Project

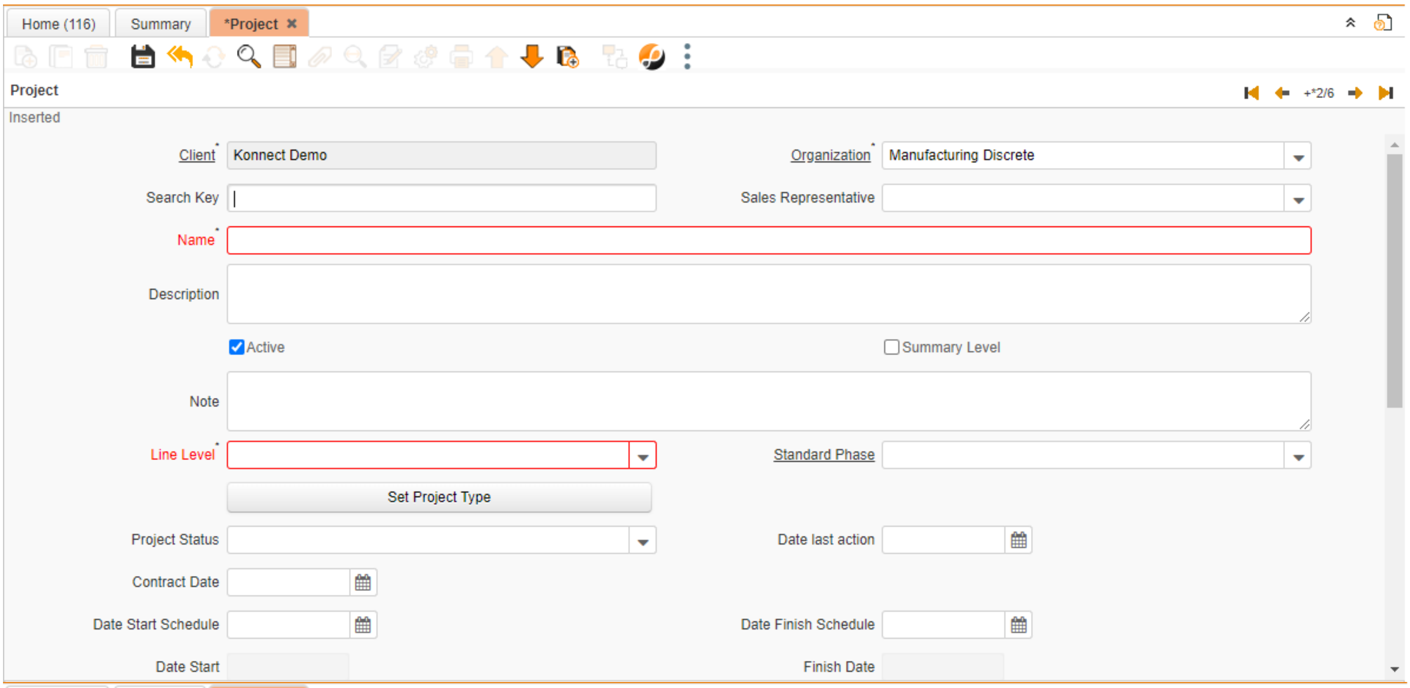
Introduction

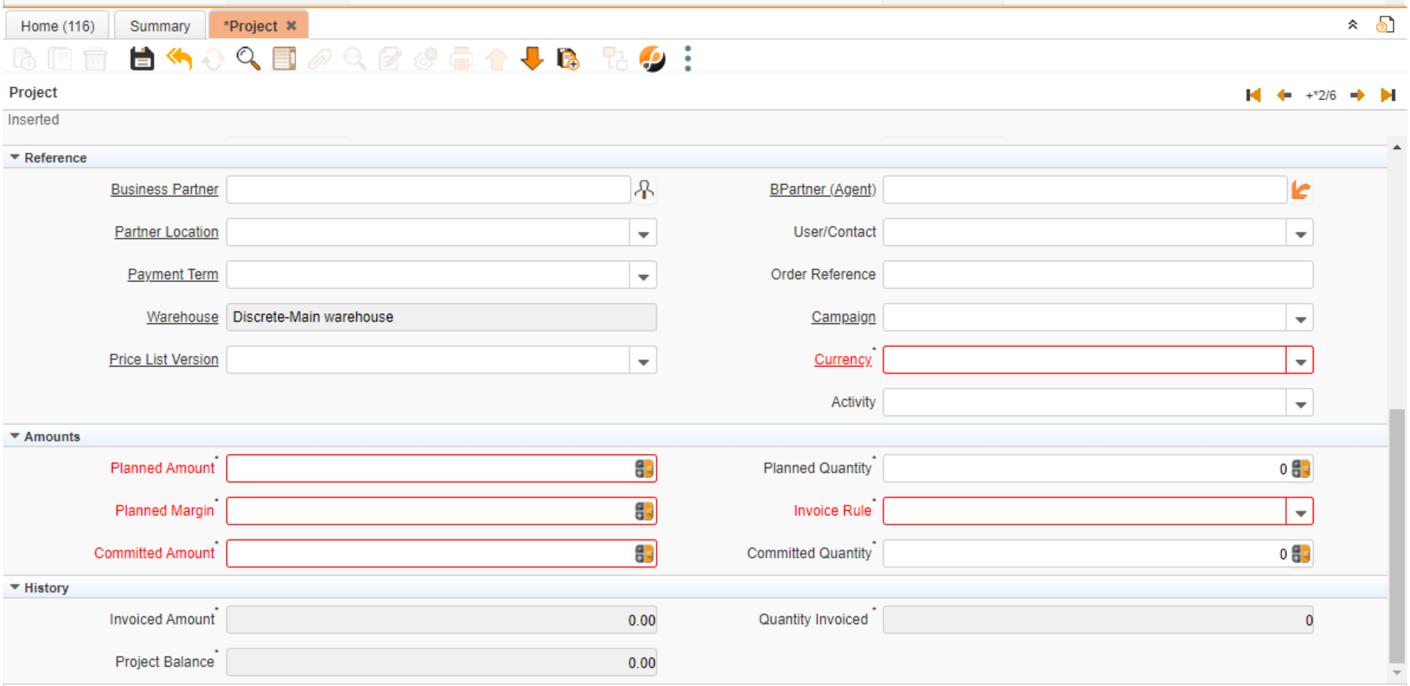
Introduction

Tabs

Tabs

Project Header





Critical Fields

1. Search key : Used to maintain unique name or code for the product

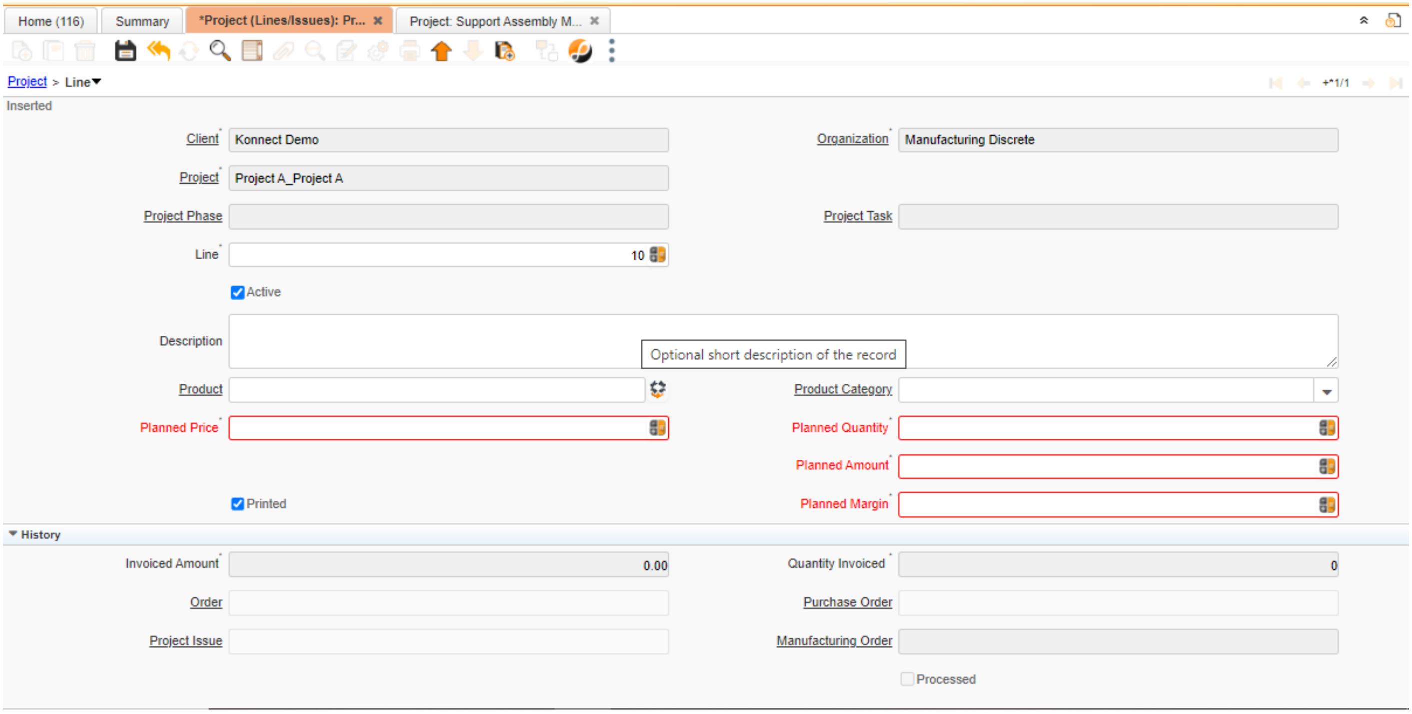
2. Name : Name of the Project
3. Line Level : Line Level details such as Project, Phase, Task.
4. Currency : Used to select the currency ISO code from the currency master. Indicates the Currency to be used when processing or reporting on this record
5. Planned Amount : This field is to mention details of planned Amount for the project
6. Planned Quantity : This field is to mention details of planned Quantity for the project
7. Planned Margin : This field is to mention details of planned Margin for the project
8. Invoice Rule : Committed Amount, None, Product Quantity, Time & Material, Time & Material Max Committed.
9. Committed Amount : This field is to mention details of Committed Amount corresponding to the project.
10. Committed Quantity : This field is to mention details of Committed Quantity Corresponding to the project.

Non-Critical Fields

1. Sales Representative: This field is used for sales rep updating purposes, It will display from the employee master when the sales rep field is checked
2. Description : To describe specifics or other information related to project
3. Note : Notes to be maintained in relation with project
4. Standard Phase : It's a Drop down to select Standard phase
5. Project Status : Current project status For example Cancelled, Initiated, In Progress, Planning, Post Completion, Suspended
6. Date last action : last date of actions
7. Contract Date : Date of contract
8. Date Start Schedule : Start schedule date
9. Date Finish Schedule Finish Schedule data
10. Business Partner : Used to select the business partner from the business partner master.
11. BPartner (Agent) : This field is to maintain BPArtner (Agent) details. It is a master data.
12. Partner Location : This field is updated automatically, based on the business partner
13. User/Contact : User/Contact details maintained in Business partner Master
14. Payment Term : The terms of payment(immediate ,30 days, etc
15. Order Reference : Order Reference details if any.

16. Warehouse: This field is for Product storage purposes, Select a warehouse where the product is stored.
17. Campaign : This field is to mention campaign details if any campaign carried out for project.
18. Price list version : Price list version for project, For Example Purchase price list, Sales price list etc
19. Activity : Activities executed for project purpose to be selected through drop down and created in activity master.

Project Lines



Critical Fields : -

1. Product : To select the product type an item, you can select the multiple products in this line item

2. Product Category : Product Category is auto-fetched from product master.(Product master)

3. Planned Price : his field is to mention details of planned Price for the project Line Product

4. Planned Quantity : This field is to mention details of planned Quantity for the project Line Product

5.Planned Amount : This field is to mention details of planned Amount for the project Line Product

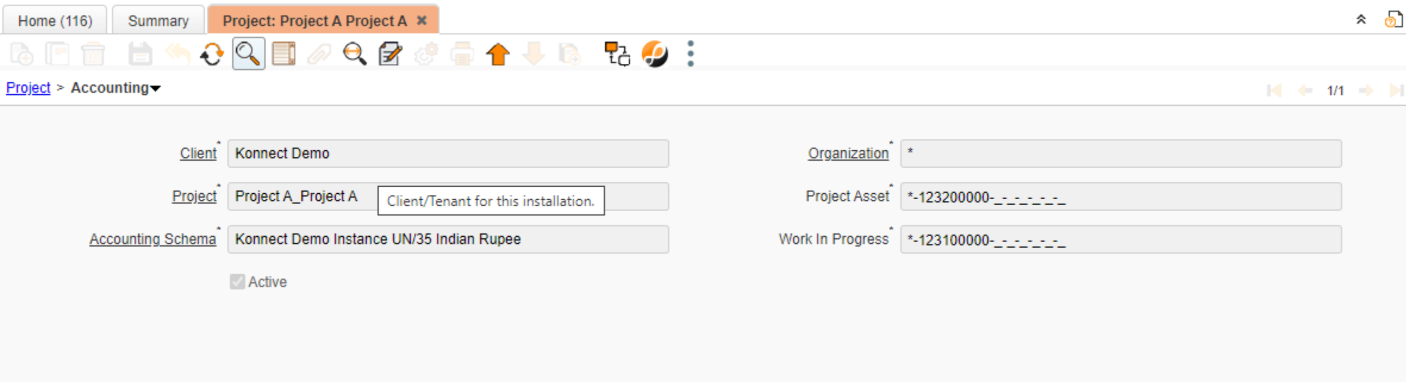
6. Planned Margin : This field is to mention details of planned Margin for the project Line product

Non-critical Fields :-

1. Description :- To Describe any specifics or notes regarding project line.

Project Lines>>Phase Activity

Accounting



This is Auto Updated Tab.

Process

Project Process

Copy Details

To Copy Lines/Phases/Tasks from other Project

Generate Order

The Generate Order process will generate a new Order document based on the project phase. A price list and warehouse/service point must be defined on the project.

Close Project

To Close project

Generate List

To generate lis

Validation

Validation

Save

1. System will check all mandatory fields.

Delete

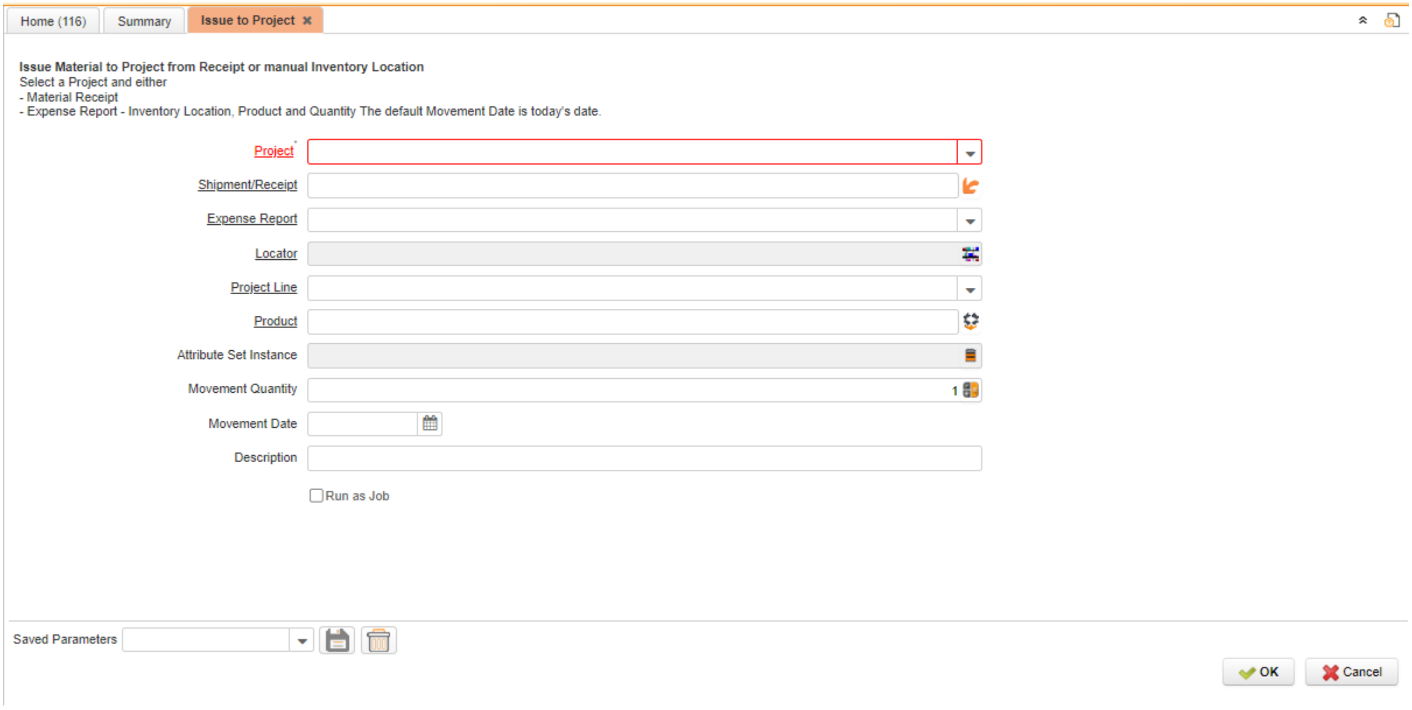
1. System will delete the order and its historical details.

Forms and Process

Forms and Process

Generate PO From Project

Issue to Project



Parameter :-

1. Project : Project is to be selected for which user wants to issue material
2. Shipment/Receipt : The project-related shipment/receipt document to be selected.
3. Expense Report : To select Expenses report in-relation with project
4. Locator : Locator to be selected accordingly or it will be auto-fetched
5. Project Line : Project line details for which user wants to issue material
6. Product : Product is be selected.
7. Attribute Set instance : Attribute set applied to product is product master is to be selected.
8. Movement Quantity : Quantity required
9. Movement Date : Date of material movement

10 .Description : Any specifics or information.

Process :-

This process is used to Issue Material to Project from Receipt or manual Inventory Location