

Project

- Introduction
 - Introduction
- Tabs
 - Project Header
 - Project Lines
 - Project Lines>>Phase Activity
 - Accounting
- Process
 - Project Process
- Validation
 - Validation
- Forms and Process
 - Generate PO From Project
 - Issue to Project

Introduction

Introduction

Introduction

Tabs

Project Header

The screenshot shows the 'Project Header' form in a software application. The form is organized into several sections:

- Project Section:** Includes fields for Client (Konnect Demo), Organization (Manufacturing Discrete), Search Key, Sales Representative, Name (highlighted with a red border), Description, Active (checked), Summary Level (unchecked), Note, Line Level (dropdown), Standard Phase (dropdown), Set Project Type button, Project Status (dropdown), Date last action (calendar), Contract Date (calendar), Date Start Schedule (calendar), Date Start, and Finish Date.
- Reference Section:** Includes Business Partner, Partner Location, Payment Term, Warehouse (Discrete-Main warehouse), Price List Version, BPartner (Agent), User/Contact, Order Reference, Campaign, Currency (dropdown), and Activity.
- Amounts Section:** Includes Planned Amount, Planned Margin, Committed Amount, Planned Quantity (0), Invoice Rule (dropdown), and Committed Quantity (0).
- History Section:** Includes Invoiced Amount (0.00), Project Balance (0.00), and Quantity Invoiced (0).

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.

Tabs

Project Lines

The screenshot shows a software interface for managing Project Lines. The form is titled "Project Lines" and is part of a "Project" record. The form contains several input fields and checkboxes. The "Planned Price", "Planned Quantity", "Planned Amount", and "Planned Margin" fields are highlighted with red borders. The "Description" field has a placeholder text "Optional short description of the record". The "History" section at the bottom shows "Invoiced Amount" as 0.00 and "Quantity Invoiced" as 0.

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.

Tabs

Project Lines >> Phase Activity

Tabs

Accounting

The screenshot shows a software interface with a tab titled "Project: Project A Project A". Below the tab is a toolbar with various icons. The main content area is titled "Project > Accounting" and contains several input fields:

Client	Konnect Demo	Organization	*
Project	Project A_Project A <input type="text" value="Client/Tenant for this installation."/>	Project Asset	*-123200000-_-_-_-_-
Accounting Schema	Konnect Demo Instance UN/35 Indian Rupee	Work In Progress	*-123100000-_-_-_-_-

There is also a checkbox labeled "Active" which is checked.

This is Auto Updated Tab.

Process

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

Validation

Save

1. System will check all mandatory fields.
-

Delete

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

Forms and Process

Generate PO From Project

Issue to Project

Home (116) Summary Issue to Project x

Issue Material to Project from Receipt or manual Inventory Location
Select a Project and either
- Material Receipt
- Expense Report - Inventory Location, Product and Quantity The default Movement Date is today's date.

Project

Shipment/Receipt

Expense Report

Locator

Project Line

Product

Attribute Set Instance

Movement Quantity

Movement Date

Description

Run as Job

Saved Parameters

OK Cancel

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