

# Project

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# Introduction

# Introduction

# Tabs

# Project Header

Home (116) Summary **\*Project x**

Project

Inserted

Client:  Organization:

Search Key:  Sales Representative:

Name:

Description:

☒ Active ☐ Summary Level

Note:

Line Level:  Standard Phase:

Project Status:  Date last action:

Contract Date:  Date Start Schedule:  Date Finish Schedule:

Date Start:  Finish Date:

Home (116) Summary **\*Project x**

Project

Inserted

Reference

Business Partner:  BPartner (Agent):

Partner Location:  User/Contact:

Payment Term:  Order Reference:

Warehouse:  Campaign:

Price List Version:  Currency:

Activity:

Amounts

Planned Amount:  Planned Quantity:

Planned Margin:  Invoice Rule:

Committed Amount:  Committed Quantity:

History

Invoiced Amount:  Quantity Invoiced:

Project Balance:

## 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

The screenshot shows a software interface for managing Project Lines. The top navigation bar includes tabs for 'Home (116)', 'Summary', and 'Project (Lines/Issues): Pr...'. The main form is titled 'Project Lines' and contains the following fields and sections:

- Client:** Konnect Demo
- Organization:** Manufacturing Discrete
- Project:** Project A\_Project A
- Project Phase:**
- Project Task:**
- Line:** 10
- Active:** ☒
- Description:** (with a placeholder 'Optional short description of the record')
- Product:**
- Product Category:**
- Planned Price:**
- Planned Quantity:**
- Planned Amount:**
- Planned Margin:**
- Printed:** ☒
- History:**
  - Invoiced Amount:** 0.00
  - Quantity Invoiced:** 0
  - Order:**
  - Purchase Order:**
  - Project Issue:**
  - Manufacturing Order:**
  - Processed:** ☐

## 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

Home (116)SummaryProject: Project A Project A ✕

Project > Accounting▼

1/1

Client

Konnect Demo

Project

Project A\_Project A

Client/Tenant for this installation.

Accounting Schema

Konnect Demo Instance UN/35 Indian Rupee

☒ Active

Organization

\*

Project Asset

\*-123200000-\_-\_-\_-\_-

Work In Progress

\*-123100000-\_-\_-\_-\_-

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** ✕

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