

Project Type

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Introduction

Introduction

Introduction

Tabs

Tabs

Project Type Header

The screenshot shows a software interface for creating a new Project Type. At the top, there are tabs: 'Home (116)', 'Summary', and '*Project Type' (which is active). Below the tabs is a toolbar with various icons for actions like save, delete, and search. The main form area is titled 'Project Type' and 'Inserted'. It contains several fields: 'Client' (text box with 'Konnect Demo'), 'Organization' (dropdown menu with 'Manufacturing Discrete'), 'Name' (text box with a red border), 'Description' (text box), 'Comment/Help' (text box), 'Active' (checkbox, checked), and 'Project Category' (dropdown menu with 'General'). Below the form, there is a 'Standard Phase' tab and a 'Standard Task' tab. Below the tabs, there is a table with 0 records. The table has columns: Organization, Project Type, Sequence, Name, Description, and Comment. The text 'No Records found' is displayed below the table.

Home (116) Summary *Project Type x

Project Type

Inserted

Client* Konnect Demo Organization* Manufacturing Discrete

Name*

Description

Comment/Help

☒ Active

Project Category* General

Standard Phase Standard Task

0 Records

Organization	Project Type	Sequence	Name	Description	Comment
No Records found					

Critical Fields :-

1. Name : Name of the Project Type
2. Project category : This field represents project category
 - 2.1. Asset project
 - 2.2. General
 - 2.3. Service (Charge) project
 - 2.4. Work order (job)

Critical & one-time setup fields

- 1) Organization Field- This Field is used to select the organization to which you are going to process for the project Type.

Non-Critical fields :-

1. Description : Used to describe specifics about a Project or any other note, information, or data corresponding to project Type
2. Comment/Help : To keep information about comments or to mention any.
3. Active (Check Box) : To enable or disable active state of project

Standard Phase

Home (116)
Summary
*Project Type: Project One ✕
Product ✕

Project Type > Standard Phase
+1/1

Client*
Konnect Demo
Organization*
Manufacturing Discrete

Project Type*
Water Jet Cutting Machine

Sequence*
10

Name*
Project One Phase One

Description
Project One Phase One

Comment/Help

☒ Active

Product

Standard Quantity*
1

Standard Task

0 Records

Organization	Standard Phase	Sequence	Name	Description	Comment/Help
No Records found					

Critical Fields :-

- 1.Sequence : To apply sequence for the phase of project to be followed. It will be auto-generated by system but user can edit accordingly.
1. Name : Name of the Phase
2. Standard Quantity : This field is to mention standard quantity of project which is mandatory

Critical & onetime setup Fields

- 1.Organization Field- This Field is used to select the organization which you are going to process the document.

Non-Critical fields :-

1. Description : Used to describe specifics about a Project Phase or any other note, information corresponding to project Phase
2. Comment/Help : To keep information about comments or to mention any.
3. Active (Check Box) : To enable or disable active state of project phase.
4. Product : Product details to add under project if required

Standard Phase>>Standard Task

Home (116) Summary *Project Type: Project One x Product x

Project Type > Standard Phase > Standard Task

Inserted

Client: Konnect Demo Organization: Manufacturing Discrete

Standard Phase: Project One Phase One_Project One

Sequence: 10

Name: Task One

Description:

Comment/Help:

☒ Active

Product:

Standard Quantity: 1

Critical Fields :-

1.Sequence : To apply sequence for the Task under project Phase to be followed. It will be auto-generated by system but user can edit accordingly.

1. Name : Name of the Task

2. Standard Quantity : This field is to mention standard quantity of project Phase task which is mandatory

Non-Critical fields :-

1.Description : Used to describe specifics about a Project Phase Task or any other note,

information corresponding to project Phase

- 2.Comment/Help : To keep information about comments or to mention any.
- 3.Active (Check Box) : To enable or disable active state of project phase task.
- 4.Product : Product details to add under project Phase task if required.

Validation

Validation

Save

1. It is used to save the records after the mandatory fields are filled.
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Delete

1. It is used to delete the records before the transactions are completed.