



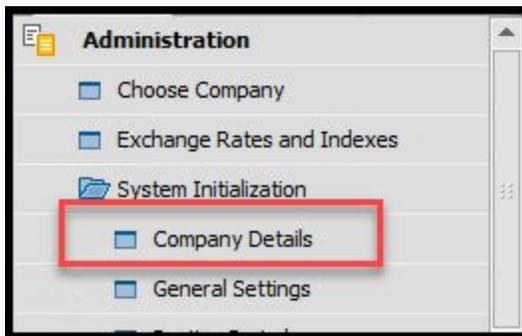
# Project Management

## Summary

This function centralizes all related transactions, resources, documents and activities for a specific project giving insight into both project management data and financial data all in one central location.

## How - To

1. Navigate to Administration > System Initialization > Company Details





2. Navigate to the *Basic Initialization* tab. Make sure the *Enable Project Management* box is checked.

The screenshot shows the 'Company Details' dialog box with the 'Basic Initialization' tab selected. The 'Enable Project Management' checkbox is checked and highlighted with a red box. Other settings include 'Chart of Accounts Template' set to 'User-Defined', 'Local Currency' and 'System Currency' set to 'US Dollar', and 'Default Account Currency' set to 'All Currencies'. The 'House Bank' section shows 'Default Bank Country' as 'USA'. The 'Calculate Depreciation By' is set to 'Month'. The 'OK' and 'Cancel' buttons are at the bottom.

Field	Value
Chart of Accounts Template	User-Defined
Local Currency	US Dollar
System Currency	US Dollar
Default Account Currency	All Currencies
Display Credit Balance with Negative Sign	<input checked="" type="checkbox"/>
Use Segmentation Accounts	<input checked="" type="checkbox"/>
Allow Negative Amounts for Reversal Transaction Posting	<input type="checkbox"/>
Permit More than One Document Type per Series	<input type="checkbox"/>
Multi-Language Support	<input type="checkbox"/>
Use Perpetual Inventory	<input checked="" type="checkbox"/>
Item Groups Valuation Method	Moving Average
Manage Item Cost per Warehouse	<input checked="" type="checkbox"/>
Allow Stock Release Without Item Cost	<input checked="" type="checkbox"/>
Manage Serial and Batch Cost By	Items Group Valuation Method
House Bank	
Default Bank Country	USA
Default Bank	
Default Account No.	
Default Branch	
Install Bank Statement Processing	<input type="checkbox"/>
Enable Fixed Assets	<input checked="" type="checkbox"/>
Calculate Depreciation By	Month
Enable Multiple Branches	<input type="checkbox"/>
Mask Credit Card Number	<input checked="" type="checkbox"/>
Enable Advanced G/L Account Determination	<input type="checkbox"/>
Allow Selection of Any Account Type for Revenue Accounts	<input type="checkbox"/>
Enable Project Management	<input checked="" type="checkbox"/>



3. Once the box is checked, close out of Company Details and navigate to Project Management > Project



4. The Project form will open in Add mode. You can switch to Find mode to find an existing project

5. To Add a new project, the following fields are required:

- Project Type: Internal or External
- BP Code
- Project Name



- Start and Due Date

The rest are optional but highly encouraged to use as they are useful.

The screenshot shows a software window titled "Project - Brand Release Marketing". The interface is divided into several sections:

- Project Information:** Includes fields for Project Type (radio buttons for External and Internal, with Internal selected), BP Code, BP Name, Contact Person, Territory, Sales Employee, and Owner (Smith, Jason). There is also a checkbox for "Project with Subprojects".
- Project Details:** Includes Project Name (Brand Release Marketing), Project No. (2), Status (Primary), Start Date (06/27/2017), Due Date (07/31/2017), Closing Date, Open Activities (0), % Complete (0%), and Financial Project (DEPT: Mktg).
- Navigation Tabs:** Overview, Stages, Summary, Remarks, Attachments.
- Overview Section:** Includes Risk Level (Low), Industry, and a Comments box containing "Marketing Plan for new Brand Release".
- Table:** A table with columns for Subprojects, Fulfillment, and Status. The table is currently empty.
- Buttons:** "Add" and "Cancel" buttons are located at the bottom left.

[View Full Sized Image Here](#)

6. From here you can go to the *Stages* tab to outline the project and the planned cost of each stage of the project.

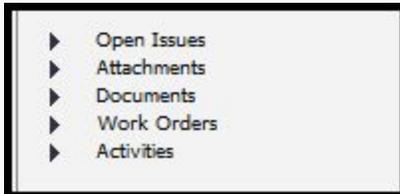
From here you can:

- Set a start day for each stage of the project
- Determine what stage each task of the project falls under



- Define tasks
- Input anticipated costs for each task
- Set a Owner for each task
- Set multiple tiers of Stage Dependence

7. Below, you will also find a list of other functions you can link to the project:



Each will drop down with a new grid allowing you to monitor open issues with the project, attach documents, link documents, create work orders and keep track of project activities.

8. The *Summary* tab will give you full insight into the project, letting you know it is on track, on budget and on time.

The screenshot displays the 'Summary' tab for a project named 'Brand Release Marketing'. The interface includes a header with project details, a navigation bar with tabs for Overview, Stages, Summary, Remarks, and Attachments, and a main content area with three tables: Budget, Profit Values, and Work Order Costs. Below these are sections for Accumulated Budget, Accumulated Profit Values, and Dates.

Budget		Profit Values		Work Order Costs	
Subproject Budget	0.00	Potential Subproject Amount	0.00	Actual Item Component Cost	0.00
Open Amount (A/P)	0.00	Open Amount (A/R)	0.00	Actual Resource Component Cost	0.00
Invoiced (A/P)	0.00	Invoiced (A/R)	0.00	Actual Additional Cost	0.00
Total (A/P)	0.00	Total (A/R)	0.00	Actual Product Cost	0.00
Total Variance	0.00	Total Variance	0.00	Actual By-Product Cost	0.00
Variance %	0.00	Variance %	0.00	Total Variance	0.00

Accumulated Budget		Accumulated Profit Values		Dates	
Accumulated Subproject Budget	0.00	Accumulated Potential Subproject Amount	0.00	Due Date	07/31/2017
Accumulated Open Amount (A/P)	0.00	Accumulated Open Amount (A/R)	0.00	Actual Closing Date	
Accumulated Invoiced (A/P)	0.00	Accumulated Invoiced (A/R)	0.00	Overdue	0
Accumulated Total (A/P)	0.00	Accumulated Total (A/R)	0.00		
Accumulated Total Variance	0.00	Accumulated Total Variance	0.00		
Variance %	0.00	Variance %	0.00		



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