

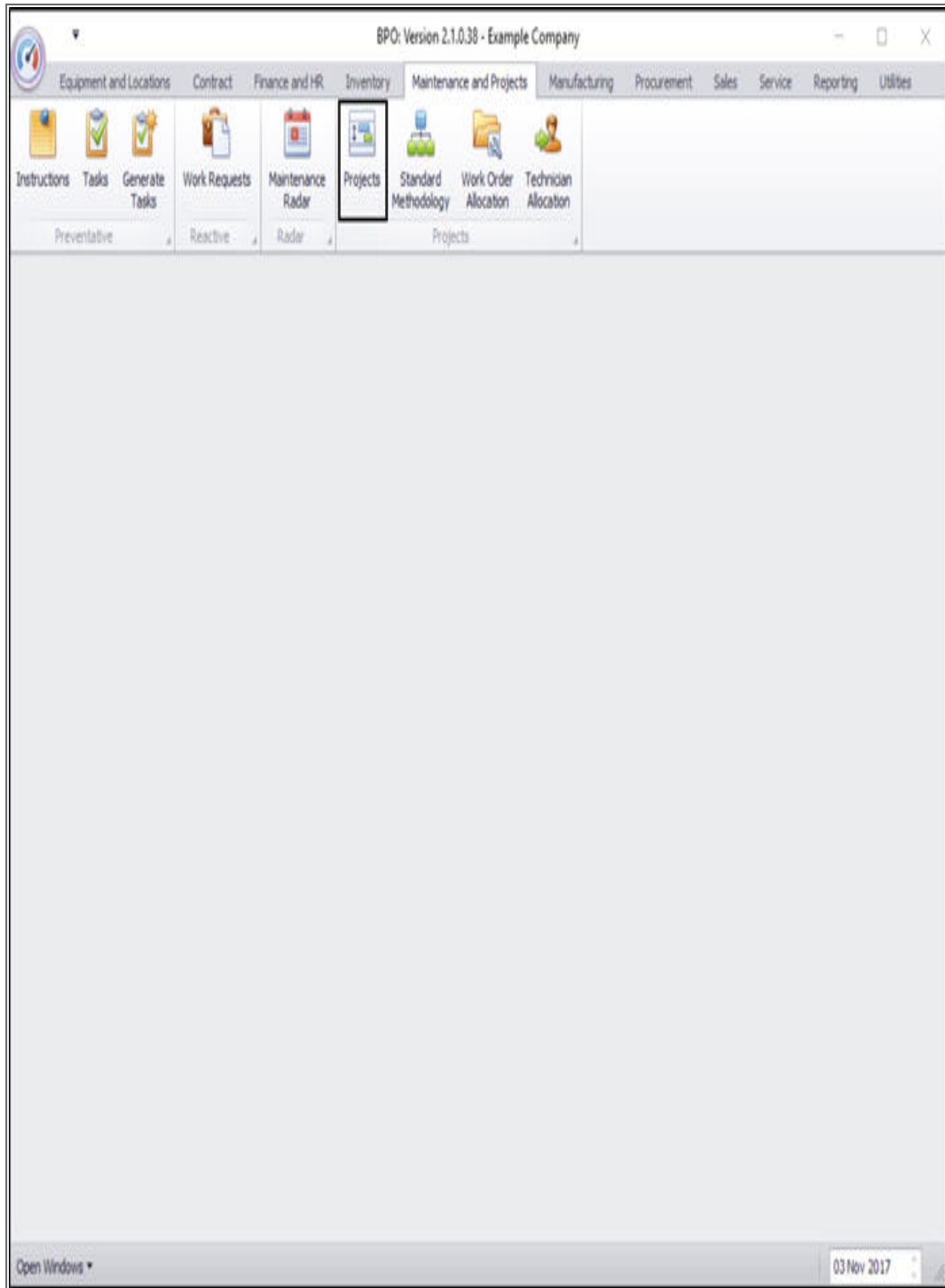
PROJECTS

PROJECT FINANCE – NEW DEAL BUDGET VS ACTUAL

In order to view Project Finance information, the project must originate from a Sales Order (New Deal Project).

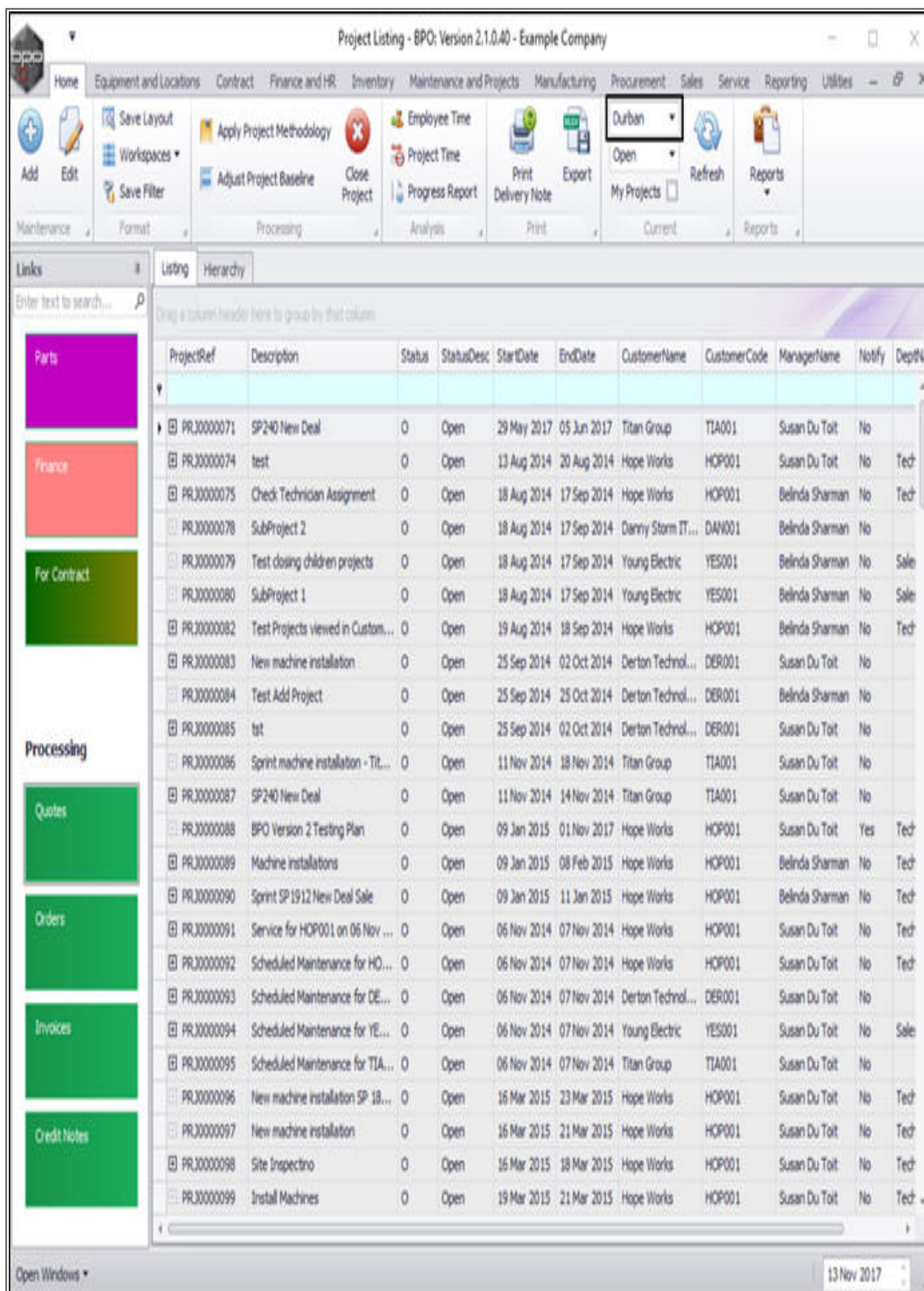
All cost items and invoiced processed against this project will be listed, along with a Net Profit total.

Ribbon Access: *Maintenance/ Projects > Projects*



The ***Projects Listing*** screen will be displayed.

- Select the **site**.
- In this image **Durban** has been selected.



Project Listing - BPO: Version 2.1.0.40 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Layout Apply Project Methodology Employee Time Project Time Progress Report Print Delivery Note Export Refresh Reports

Open My Projects

Links

Enter text to search...

Parts

Finance

For Contract

Processing

Quotes

Orders

Invoices

Credit Notes

ProjectRef	Description	Status	StatusDesc	StartDate	EndDate	CustomerName	CustomerCode	ManagerName	Notify	DeptName
PRJ0000071	SP240 New Deal	0	Open	29 May 2017	05 Jun 2017	Titan Group	TIA001	Susan Du Toit	No	
PRJ0000074	test	0	Open	13 Aug 2014	20 Aug 2014	Hope Works	HOP001	Susan Du Toit	No	Tech
PRJ0000075	Check Technician Assignment	0	Open	18 Aug 2014	17 Sep 2014	Hope Works	HOP001	Belinda Sharman	No	Tech
PRJ0000078	SubProject 2	0	Open	18 Aug 2014	17 Sep 2014	Danny Storm IT...	DAN001	Belinda Sharman	No	
PRJ0000079	Test closing children projects	0	Open	18 Aug 2014	17 Sep 2014	Young Electric	YES001	Belinda Sharman	No	Sale
PRJ0000080	SubProject 1	0	Open	18 Aug 2014	17 Sep 2014	Young Electric	YES001	Belinda Sharman	No	Sale
PRJ0000082	Test Projects viewed in Custom...	0	Open	19 Aug 2014	18 Sep 2014	Hope Works	HOP001	Belinda Sharman	No	Tech
PRJ0000083	New machine installation	0	Open	25 Sep 2014	02 Oct 2014	Derton Technol...	DER001	Susan Du Toit	No	
PRJ0000084	Test Add Project	0	Open	25 Sep 2014	25 Oct 2014	Derton Technol...	DER001	Belinda Sharman	No	
PRJ0000085	test	0	Open	25 Sep 2014	02 Oct 2014	Derton Technol...	DER001	Susan Du Toit	No	
PRJ0000086	Sprint machine installation - Tit...	0	Open	11 Nov 2014	18 Nov 2014	Titan Group	TIA001	Susan Du Toit	No	
PRJ0000087	SP240 New Deal	0	Open	11 Nov 2014	14 Nov 2014	Titan Group	TIA001	Susan Du Toit	No	
PRJ0000088	BPO Version 2 Testing Plan	0	Open	09 Jan 2015	01 Nov 2017	Hope Works	HOP001	Susan Du Toit	Yes	Tech
PRJ0000089	Machine installations	0	Open	09 Jan 2015	08 Feb 2015	Hope Works	HOP001	Belinda Sharman	No	Tech
PRJ0000090	Sprint SP1912 New Deal Sale	0	Open	09 Jan 2015	11 Jan 2015	Hope Works	HOP001	Belinda Sharman	No	Tech
PRJ0000091	Service for HOP001 on 06 Nov ...	0	Open	06 Nov 2014	07 Nov 2014	Hope Works	HOP001	Susan Du Toit	No	Tech
PRJ0000092	Scheduled Maintenance for HO...	0	Open	06 Nov 2014	07 Nov 2014	Hope Works	HOP001	Susan Du Toit	No	Tech
PRJ0000093	Scheduled Maintenance for DE...	0	Open	06 Nov 2014	07 Nov 2014	Derton Technol...	DER001	Susan Du Toit	No	
PRJ0000094	Scheduled Maintenance for YE...	0	Open	06 Nov 2014	07 Nov 2014	Young Electric	YES001	Susan Du Toit	No	Sale
PRJ0000095	Scheduled Maintenance for TIA...	0	Open	06 Nov 2014	07 Nov 2014	Titan Group	TIA001	Susan Du Toit	No	
PRJ0000096	New machine installation SP 18...	0	Open	16 Mar 2015	23 Mar 2015	Hope Works	HOP001	Susan Du Toit	No	Tech
PRJ0000097	New machine installation	0	Open	16 Mar 2015	21 Mar 2015	Hope Works	HOP001	Susan Du Toit	No	Tech
PRJ0000098	Site Inspectio	0	Open	16 Mar 2015	18 Mar 2015	Hope Works	HOP001	Susan Du Toit	No	Tech
PRJ0000099	Install Machines	0	Open	19 Mar 2015	21 Mar 2015	Hope Works	HOP001	Susan Du Toit	No	Tech

Open Windows

13 Nov 2017

- Click on the **row selector** in front of the **project** you wish to view the **finance details** of.
- Click on the **Finance** tile.

Project Listing - BPO: Version 2.1.0.40 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Layout Apply Project Methodology Employee Time
Workspaces Adjust Project Baseline Close Project Project Time
Save Filter Progress Report Print Delivery Note Export
My Projects Refresh Reports

Maintenance Format Processing Analysis Print Current Reports

Links Listing Hierarchy

Enter text to search...

Drag a column header here to group by that column

ProjectRef	Description	Status	StatusDesc	StartDate	EndDate	CustomerName	CustomerCode	ManagerName	Notify	Depth
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PRJ0000099	Install Machines	0	Open	19 Mar 2015	21 Mar 2015	Hope Works	HOP001	Susan Du Toit	No	Tech

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The **Parts for Project: []** screen will be displayed.

- Here you can view all the **project finance** information.

Parts for Project : PRJ0000071 - BPO: Version 2.1.0.40 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Back Save Layout Workspaces Refresh

Format Cut...

Drag a column header here to group by that column

fidLineType	fidItemCode	fidItemDesc	fidPlanned	fidActual	fidInvoiced
A	SALES Invoice	Sales Invoice	0.00	1 610.00	1 610.00
B	PART 204-147M	SP204 Magenta Toner	0.00	-350.00	-350.00
B	PART 204-147Y	SP204 Yellow Toner	0.00	-350.00	-350.00
B	PART 204-147C	SP204 Cyan Toner	0.00	-350.00	-350.00
B	PART 204-147K	SP204 Black Toner	0.00	0.00	0.00
B	PART SP204	SP204 Colour Copier	0.00	-350.00	-350.00
B	WOSV DEL	Delivery Fee	0.00	0.00	0.00
B	CRFT ADMN	ADMN	0.00	-750.00	0.00
B	CRFT TECH	TECH	0.00	-3 000.00	0.00
C	TOT Net	Net Profit	0.00	-3 540.00	210.00

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MNU.058.017