

PROJECTS

PROJECTS – ADD MAIN PROJECT

A Project is a collective group of jobs that need to be carried out.

By monitoring a Project, you can keep track of work that has been done, and work that still needs to be done.

- You have the ability to [Projects - Invoices](#) when complete.
- You can create a New Deal Sale / New Deal Rental Project from a Sales Order.

Projects are either '**Open**' or '**Closed**'. Once a project has been closed, it can not be re-opened.

Use **BPO2** to add a project or use the Work Order Allocation in [Work Order Allocation - Auto Create Projects](#) to create a project for Maintenance Planning work orders.

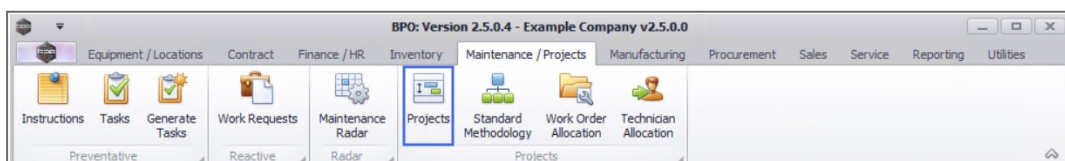


Important to Remember that Parts, Labour, Sub-Contracts and Expenses must be logged against the project before invoicing. These items cannot be added to the invoice.



Internal Services, Travel and Warranties can be added to the invoice.

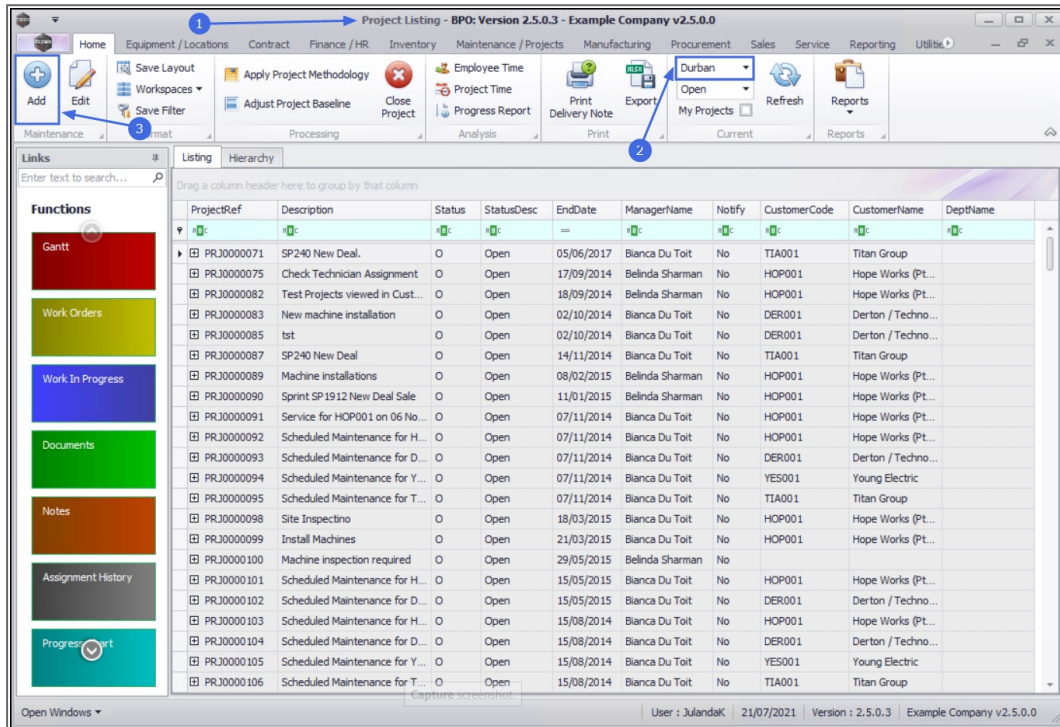
Ribbon Access: *Maintenance / Projects > Projects*



- The **Project Listing** screen will be displayed.
- Select the **Site** you wish to create the project for.
 - The example has **Durban** selected.
- Click on **Add**.



Short cut key: **Right click** to display the **All groups** menu list. Click on **Add**.



ADD MAIN PROJECT

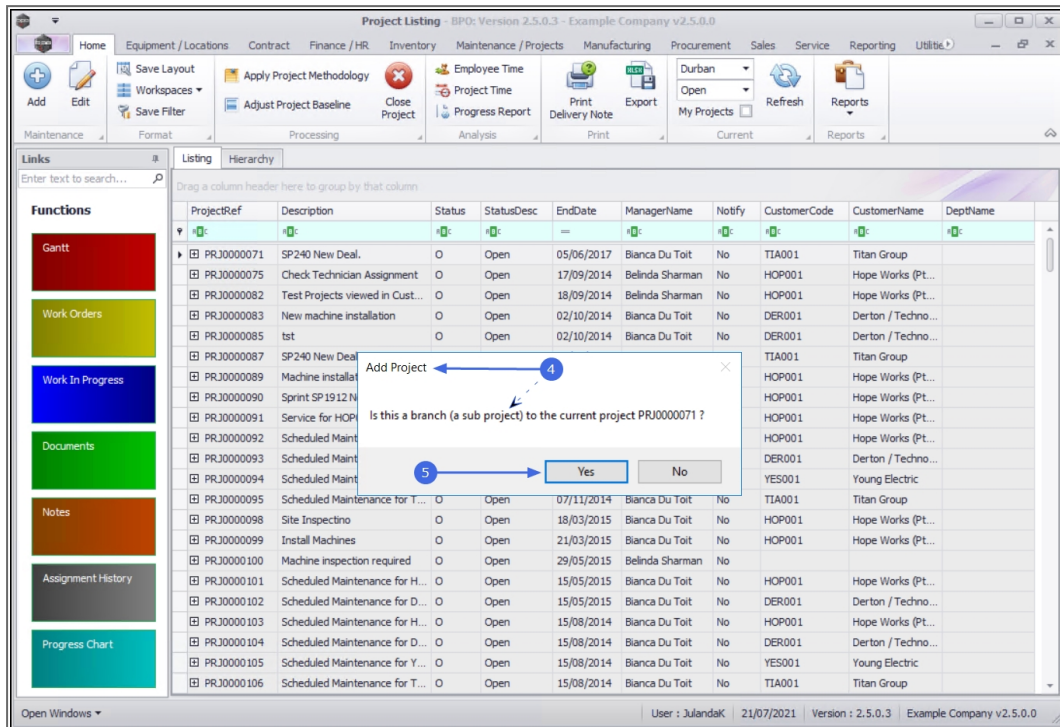


If the Project Listing screen lists projects in the Listing frame, then the first project in the list will be selected by default. You will therefore receive a message enquiring whether you are creating a sub-project for the selected project.

- You will receive an **Add Project** message requesting;
 - **Is this a branch (a sub project) to the current project PRJ**

[project ref number]?

5. Click on **No** to create the main project.



6. The **Add a new project** screen will be displayed.

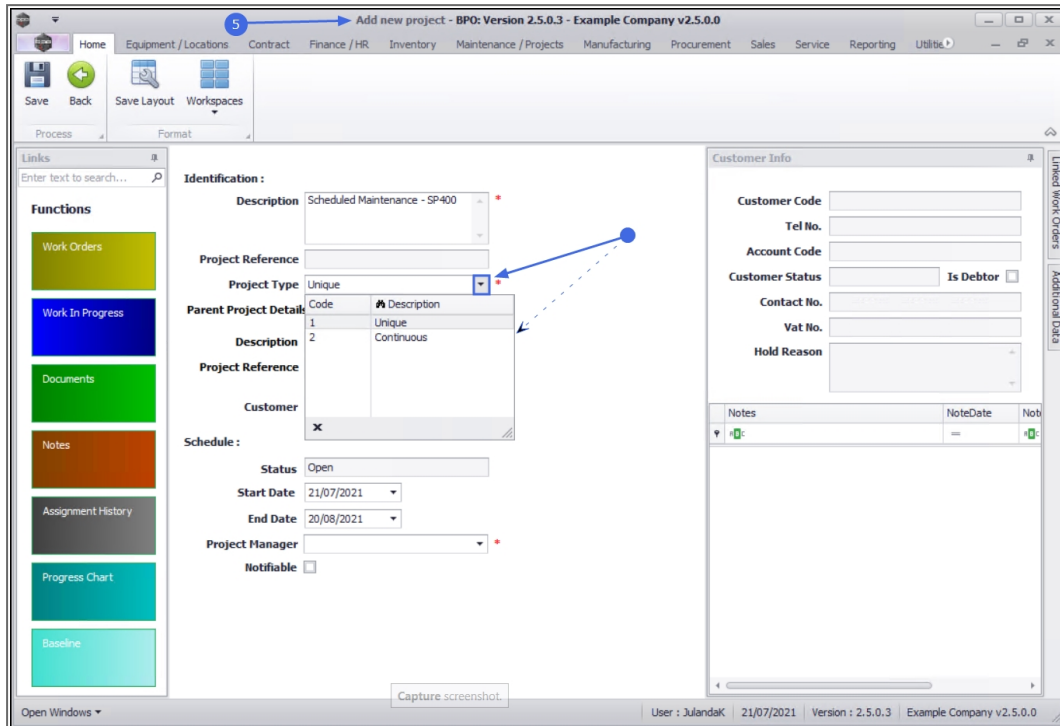
IDENTIFICATION

- **Description:** Type in a **description**¹ for the project you are creating.
- **Project Reference:** Type in the Project reference Number.

If the field is greyed out, then the Project Reference has been set to automatically issue the project reference number. Refer to **project configuration** for more information.

¹The project description is a short explanation what the project is all about, e.g. Scheduled Maintenance that needs to be performed.

- **Project Type:** Click on the down **arrow** to select the **project type**¹ that applies to the project you are creating.



PARENT PROJECT DETAILS

The fields for *Description* and *Project Reference* have been greyed out as this do not apply when creating the Main Project.

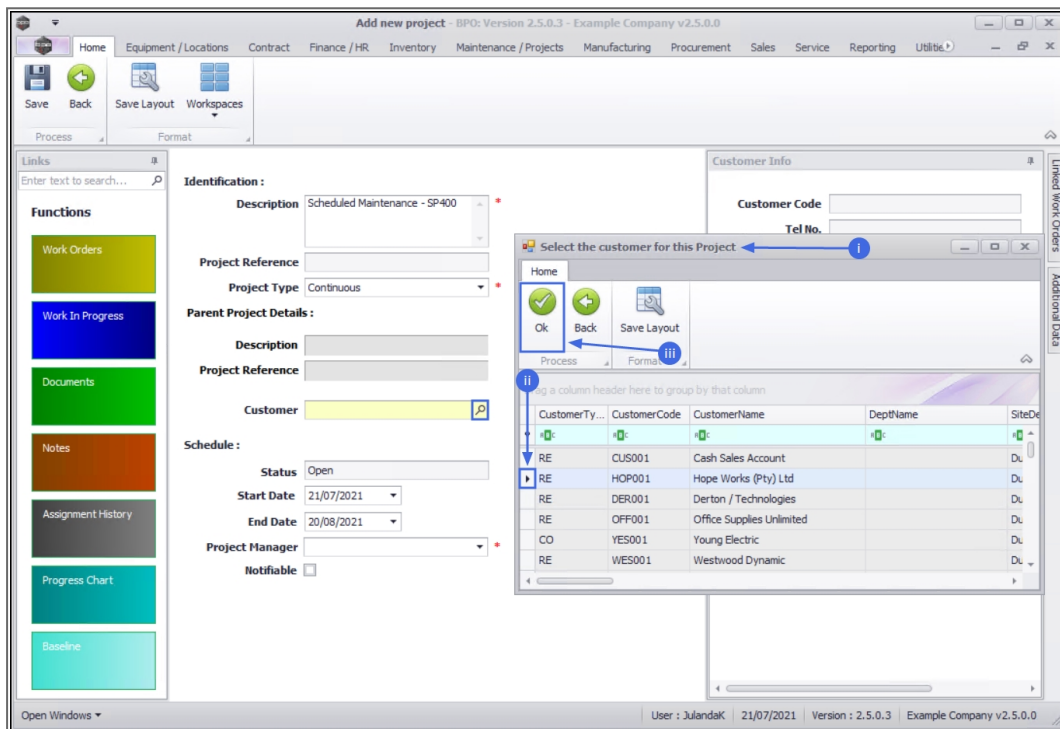
- **Customer:** Click on the **Search** button to select the customer you wish to link to the project.

¹Unique - Applies to a project that you will start work on and close, for instance a Customer Installation. Continuous - Applies to a project that will have an expanded duration, for instance a Service Agreement where maintenance may need to take place over a period of time.



This field can be left blank if the work orders created for this project have no link to customer work.

- The **Select the customer for this Project** screen will be displayed.
- Scroll and click in the **row** of the Customer you are creating the project for.
- Click on **OK**.



Add new project - BPO: Version 2.5.0.3 - Example Company v2.5.0.0

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

Save | Back | Save Layout | Workspaces

Process | Format

Links
Enter text to search...

Functions

- Work Orders
- Work In Progress
- Documents
- Notes
- Assignment History
- Progress Chart
- Baseline

Identification :

Description: Scheduled Maintenance - SP400

Project Reference:

Project Type: Continuous

Parent Project Details :

Description:

Project Reference:

Customer:

Schedule :

Status: Open

Start Date: 21/07/2021

End Date: 20/08/2021

Project Manager:

Notifiable: ☐

Customer Info

Customer Code:

Tel No.:

Select the customer for this Project

Home | Back | Save Layout

Process | Format

drag a column header here to group by that column

CustomerTy...	CustomerCode	CustomerName	DeptName	SiteDe
RE	CUS001	Cash Sales Account		Du
RE	HOP001	Hope Works (Pty) Ltd		Du
RE	DER001	Derton / Technologies		Du
RE	OFF001	Office Supplies Unlimited		Du
CO	YES001	Young Electric		Du
RE	WES001	Westwood Dynamic		Du

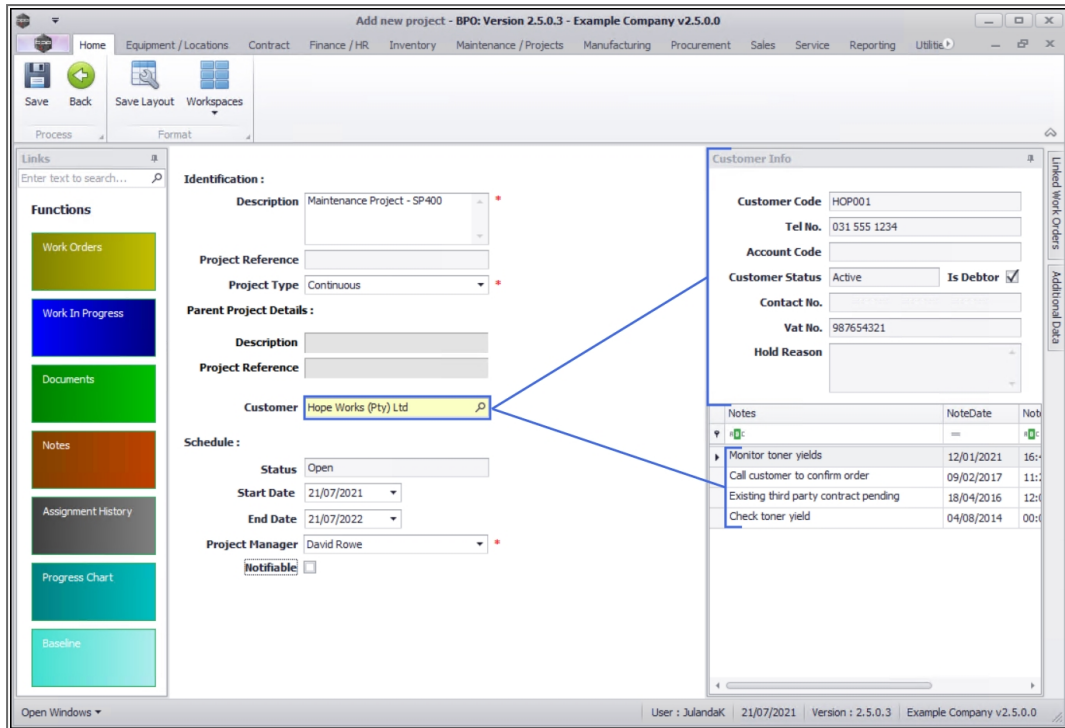
Open Windows

User : JulandaK | 21/07/2021 | Version : 2.5.0.3 | Example Company v2.5.0.0

CUSTOMER INFO FRAME

The Customer Info frame will be auto populated with the Customer information you have selected. No changes can be made to the Customer Information in this frame.

Any **Notes** linked to this customer can also be viewed here.



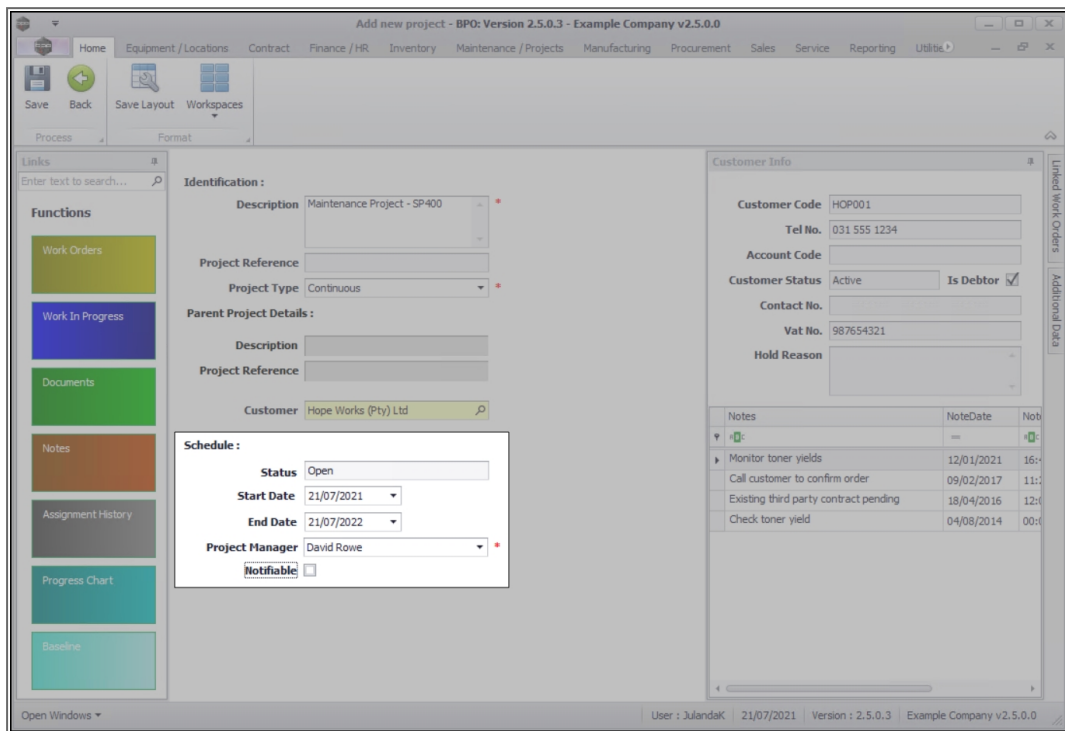
SCHEDULE

- **Status:** This is the current status for the project and will display *Open* by default. This field cannot be changed from this screen.
- **Start Date:** This will auto populate with the current date. *Type* in or click on the down *arrow* to select the starting date for the project using the Calendar function.
- **End Date:** The end date will be set a month from the start date. *Type* in or click on the down *arrow* to select the expected end date for the project using the Calendar function.
- **Project Manager:** Click on the down *arrow* to select the name of the project manager for the project.
- **Notifiable:** This option is not used by the system.



Note: For notifications, use the [Projects - Assignment History](#) to the project work order(s) function. If the [Company Configuration](#) is

set up correctly, then the technician will receive an email for the assignment.



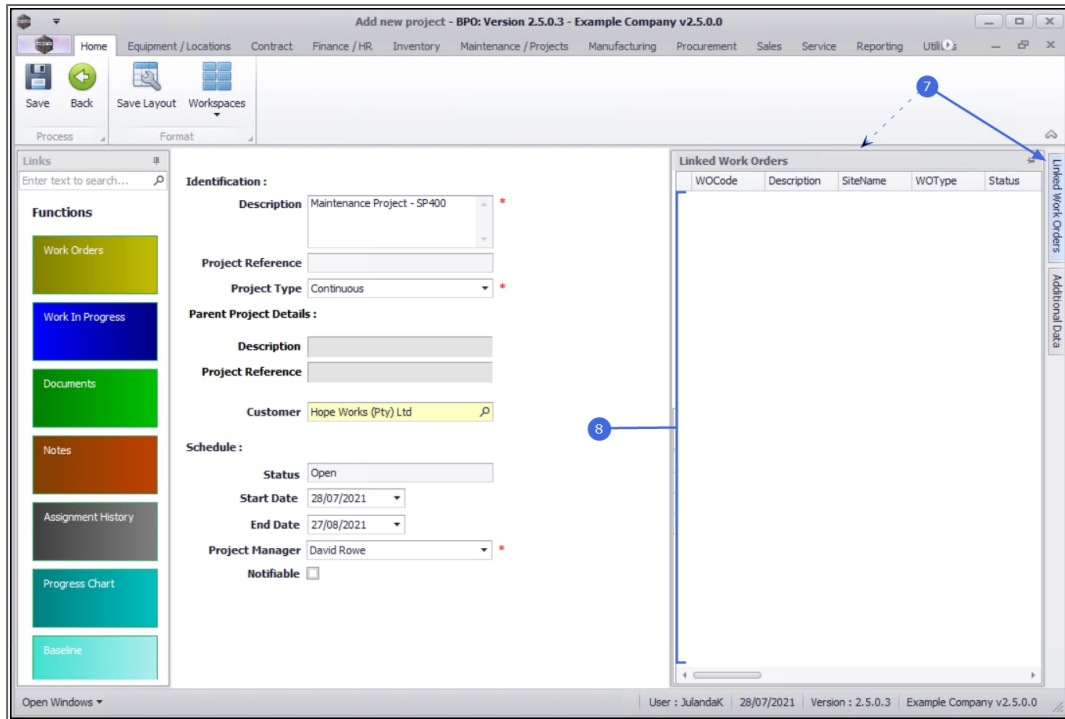
LINKED WORK ORDERS

- Click on the **Linked Work Orders** tab on the right hand side of this screen to display the **Linked Work Orders** frame.



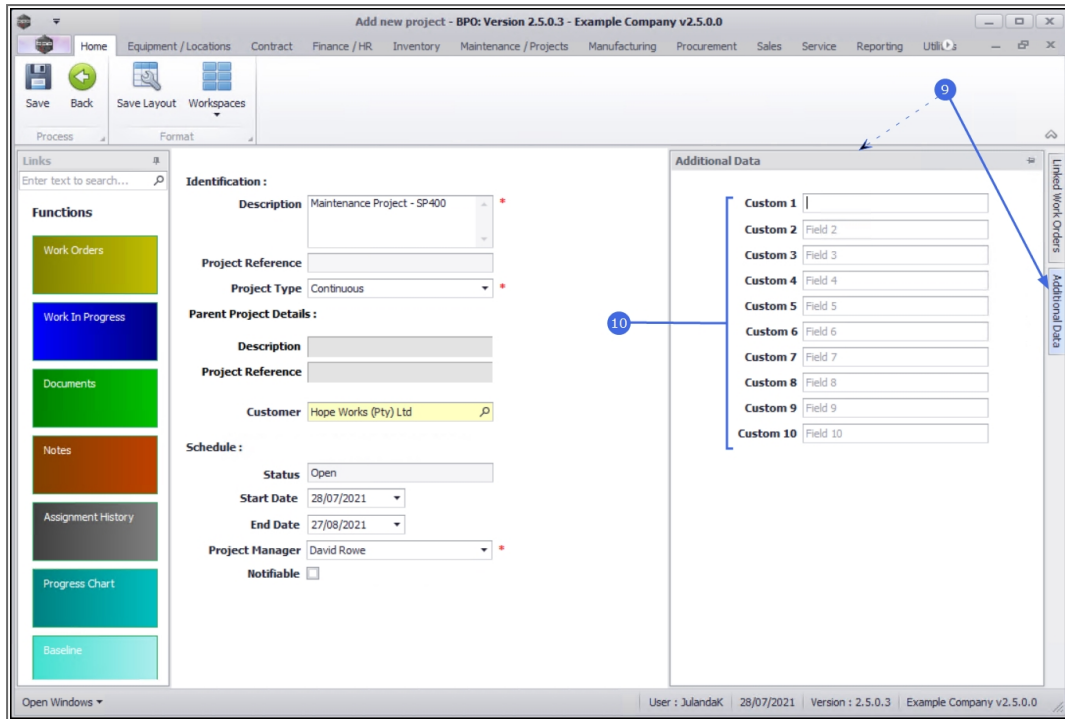
Note that this panel can be docked to leave it expanded on the screen to make it easier to work in.

- Any work order(s) linked to this project will display in this frame.



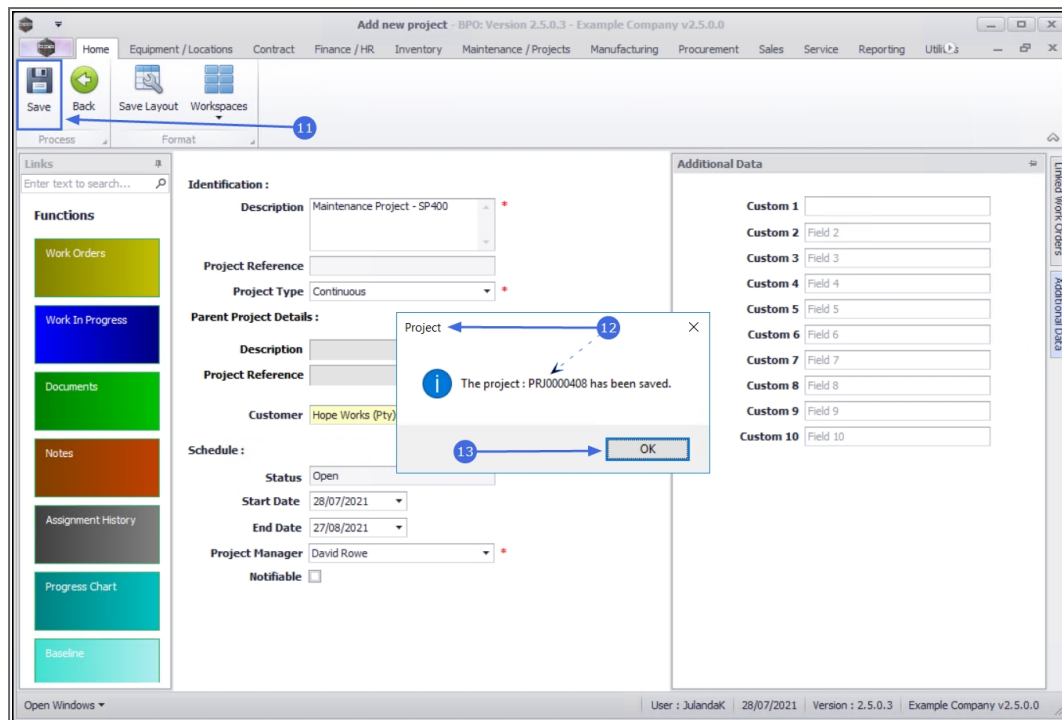
ADDITIONAL DATA

9. You may wish to include information not covered in the project frames. Click on the **Additional Data** tab to expand the **Additional Data** frame.
10. Any **extra** information can be added in the Custom 1 - 10 fields. These field names can be re-named to suit your company requirements.
 - Please contact your BPO Analyst or CO3 Support for assistance.

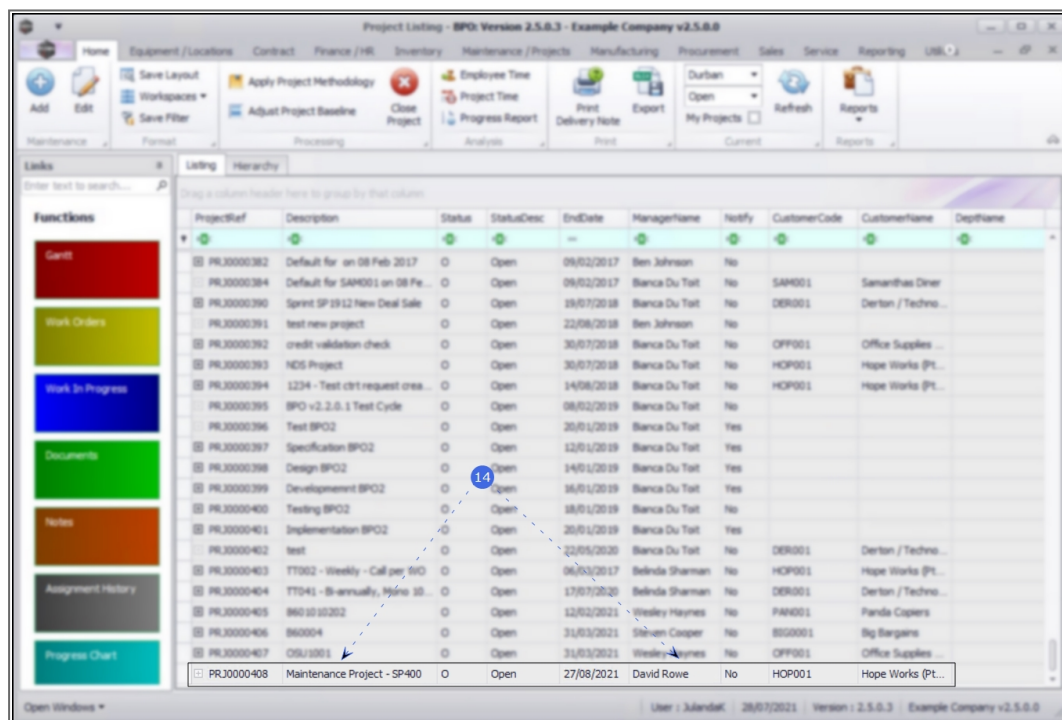


SAVE MAIN PROJECT

11. When you have finished adding details to this screen, click on **Save**.
12. Next you will receive the **Project** message informing you that;
 - **The project: [project ref number] has been saved.**
13. Click on **OK**.



14. You will return to the **Project Listing** screen where you can now view the newly created project in the Project list.



ProjectRef	Description	Status	StatusDesc	EndDate	ManagerName	Notfy	CustomerCode	CustomerName	DeptName
PRJ0000382	Default for on 08 Feb 2017	O	Open	09/02/2017	Ben Johnson	No			
PRJ0000384	Default for SAP001 on 08 Feb 2017	O	Open	09/02/2017	Bianca Du Toit	No	SAP001	Samanthas Diner	
PRJ0000390	Sprint SP 19 12 New Deal Sale	O	Open	19/07/2018	Bianca Du Toit	No	DER001	Derton / Techno...	
PRJ0000391	test new project	O	Open	22/08/2018	Ben Johnson	No			
PRJ0000392	credit validation check	O	Open	30/07/2018	Bianca Du Toit	No	OFF001	Office Supplies ...	
PRJ0000393	NCIS Project	O	Open	30/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt...	
PRJ0000394	1234 - Test cdt request crea...	O	Open	14/08/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt...	
PRJ0000395	BPO v2.2.0.1 Test Cycle	O	Open	08/02/2019	Bianca Du Toit	No			
PRJ0000396	Test BPO2	O	Open	20/01/2019	Bianca Du Toit	Yes			
PRJ0000397	Specification BPO2	O	Open	12/01/2019	Bianca Du Toit	Yes			
PRJ0000398	Design BPO2	O	Open	14/01/2019	Bianca Du Toit	Yes			
PRJ0000399	Development BPO2	O	Open	16/01/2019	Bianca Du Toit	Yes			
PRJ0000400	Testing BPO2	O	Open	18/01/2019	Bianca Du Toit	No			
PRJ0000401	Implementation BPO2	O	Open	20/01/2019	Bianca Du Toit	Yes			
PRJ0000402	test	O	Open	22/01/2019	Bianca Du Toit	No	DER001	Derton / Techno...	
PRJ0000403	TT002 - Weekly - Call pay 600	O	Open	06/03/2017	Belinda Sherman	No	HOP001	Hope Works (Pt...	
PRJ0000404	TT041 - Bi-annually, 1000 30...	O	Open	17/07/2020	Belinda Sherman	No	DER001	Derton / Techno...	
PRJ0000405	860 10 10 2021	O	Open	12/02/2021	Shelley Haynes	No	PAN001	Panda Copiers	
PRJ0000406	860004	O	Open	31/03/2021	Shelley Cooper	No	8600001	Big Bargains	
PRJ0000407	09/10/2021	O	Open	31/03/2021	Shelley Haynes	No	OFF001	Office Supplies	
PRJ0000408	Maintenance Project - SP400	O	Open	27/08/2021	David Rowe	No	HOP001	Hope Works (Pt...	

Related Topics

- [Projects - Add Sub-Project](#)
- [Projects - Edit Project](#)
- [Projects - Close Project](#)
- [Assign Technician](#)

MNU.058.001

