

SALES

CUSTOMERS - PROJECT HISTORY

The **Project History** tile in the **Customer Listing** screen, allows you to view a list of <u>all</u> the Projects linked to a <u>specific</u> customer. You will be able to monitor a Project and you can invoice a Project from the **Project History**.

You will be able to view **Closed** Projects from the **Project History** screen. You <u>cannot</u> reopen a Project once it has been closed.

Ribbon Access: Sales > Customers



- 1. The *Customer Listing* screen will be displayed.
- 2. Select the *Site* where the customer can be located.
 - The example has *Durban* selected.
- 3. Select the *Status* for the customer
 - The example has *Active* selected.
- Click in the *row* of the customer for whom you wish to view the Project History.
- 5. Click on the *Project History* tile.

Note: If the Project History tile is <u>not</u> visible from the list, move your mouse over the tiles in the *Functions* panel to display *up* and *down* arrows. Click on these arrows, or use the track ball / wheel on your mouse to *scroll* through the list.



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6. The *Project Listing for Customer: [customer code]* screen will be displayed.

Note that you can change the *Site* from this screen. This will allow you to choose a different site to work with where a customer has multiple sites.

- 7. Select the *Status* of the Projects that you require.
 - The example has **Open** selected.

You will be able to work with Projects in the *Open* Status. Projects that have been Closed, can only be <u>monitored</u>.



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PROJECT LISTING FRAME

- 8. The Project Listing screen will display the *Listing* frame by default.
- The Projects listed on the screen will be filtered using the *Status* you have selected.

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PROJECT HIERARCHY FRAME

- 10. Click on the *Hierarchy* tab to view the Projects in a tiered order.
- 11. Click on the *tree view chevron node* in front of the Project to display:
 - i. Nested *sub-projects* if there are any linked and
 - ii. any *Work Orders* linked to the Project.

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Open Windows 🕶		User : JulandaK 08/12/2020 Version : 2.4.0.11 Example Company

ADD PROJECT

- 1. From the *Project Listing for Customer : [customer code]* screen,
- 2. Ensure that the correct customer *Site* has been selected for the project you wish to add.
- 3. Click on **Add**.

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



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Progress Chart												

- 4. When you receive the *Add Project* message to confirm;
 - Is this a branch (a sub project) to the current project [project ref number]?
- 5. Click on *No* if you are creating a **Main Project**.
- 6. Click on **Yes** if you are creating a **sub project** for the selected project.



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MAIN PROJECT

If your selection was *No* to create a Main Project then;

- 7. The *Add new project* screen will be displayed.
- 8. Complete the project information for the new main project you are creating.

For a detailed handling of this topic refer to Projects - Add Main Project

9. Click on Save.



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SUB-PROJECT

If your selection was *Yes* to create a sub-project then;

- 10. The *Add new project* screen will be displayed.
- 11. The *Customer Info* frame is populated with the Customer information you have selected.
- 12. Complete the project information for the sub-project you are creating.

For a detailed handling of this topic refer to Projects - Add Sub-Project

13. Click on Save.



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EDIT PROJECT

- 1. From the *Project Listing for Customer [customer code]* screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Click on the *row* of the Project you wish to edit.
- 4. Click on *Edit*.

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



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- 5. The *Edit project : [project ref number]* screen will be displayed.
- 6. Make the required changes to the project identification information or use the Functions tiles to link Work Order or Documents to the project.

For a detailed handling of this topic refer to Projects - Edit Project

7. When you have made the required change(s), click on *Save*.



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APPLY PROJECT METHODOLOGY

When a Project Methodology is applied to a project, the layers within the methodology will generate sub-projects and work orders as set up in the methodology.

- 1. From the Project Listing for Customer [customer code] screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Click on the *row* of the Project you wish to apply a project methodology to.
- 4. Click on *Apply Project Methodology*.

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



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- 5. "The Apply Methodology screen will be displayed. " on page 2
- 6. After completing the Apply Methodology information, click on *Save*.

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- 7. You will return to the *Project Listing for Customer* screen.
- 8. When you receive the *Project* message informing you that;
 - The methodology has been applied to Project : PRJ [project ref number]
- 9. Click on *OK*.

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ADJUST PROJECT BASELINE

The baseline provides the reference points against which to compare the project progress. The baseline can be modified or reworked at any time during the project, when the scope needs to be reviewed or because the nature of the project has changed.

- 1. From the *Project Listing for Customer [customer code]* screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Click on the *row* of the Project you wish to adjust the project baseline for.



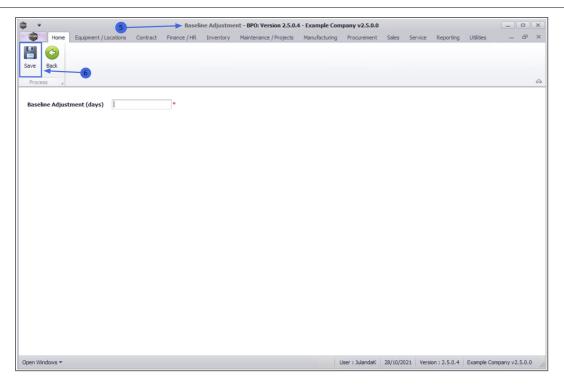
4. Click on Adjust Project Baseline.

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

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- 5. "The Baseline Adjustment screen will be displayed." on page 2
- Click on *Save* to save the baseline adjustment and return to the *Project Listing* screen.





CLOSE PROJECT

- A project is ready to be closed when the project has been completed and no further items are outstanding on the project, or the project is no longer required. You will not however be able to close the project if outstanding billable items, loan machines, un-issued stock, etc. still reflect on the project.

- Remember that once a project has been closed, it cannot be reopened. You can however still view the project information.

- 1. From the Project Listing for Customer [customer code] screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Click on the *row* of the Project you wish to close.
- 4. Click on *Close Project*.

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



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- 5. When you receive the *Project Module Closure* message informing you that;
 - The Project, Reference: PRJ[project number] has been closed.
- 6. Click on OK.



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		Default for HOP001 on 08 Fe	0	Open	09/02/2017	Ben Johnson	No	HOP001	Hope Works (Pt		
	PRJ0000363	Test save from CRM	0	Open	10/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Assignment History	PRJ0000352	test	0	Open	20/06/2018	Wesley Haynes	No	HOP001	Hope Works (Pt		
	PRJ0000351	Sprint SP 1912 New Deal Sale	0	Open	13/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
		Project meth	0	Open	18/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Progress Chart	PRJ0000344	1234	0	Open	07/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
	E PR 10000330	TT031 - Mono 1000, Colour 1	0	Open	05/05/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		

EMPLOYEE TIME

- 1. From the *Project Listing for Customer [customer code]* screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has **Durban** selected.
- 3. Click on the *row* of the Project you wish to view an employee's time sheet.
- 4. Click on *Employee Time*.



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	E PRJ	0000414	Sprint SP 1912 New Deal Sale	0	Open	30/10/2021	David Rowe	No	HOP001	Hope Works (Pt		
	E PRJ	0000412	Install Machines	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
Work Orders	E PRJ	0000411	Site Inspection	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
	E PRJ	0000410	New machine installation	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
	E PRJ	0000408	Maintenance Project - SP400	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
Work In Progress	E PRJ	0000403	TT002 - Weekly - Call per WO	0	Open	06/03/2017	Belinda Sharman	No	HOP001	Hope Works (Pt		
	E PRJ	0000394	1234 - Test ctrt request crea	0	Open	14/08/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
	E PRJ	0000393	NDS Project	0	Open	30/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
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	E PRJ	0000373	Default for HOP001 on 08 Fe	0	Open	09/02/2017	Ben Johnson	No	HOP001	Hope Works (Pt		
	E PRJ	0000372	Default for HOP001 on 08 Fe		Open	09/02/2017	Ben Johnson	No	HOP001	Hope Works (Pt		
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notes	E PRJ	0000369	Default for HOP001 on 08 Fe	0	Open	11/01/2019	Ben Johnson	No	HOP001	Hope Works (Pt		
		0000368	Default for HOP001 on 08 Fe		Open	09/02/2017	Ben Johnson	No	HOP001	Hope Works (Pt		
		0000363	Test save from CRM	0	Open	10/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Assignment History	E PRJ	0000352	test	0	Open	20/06/2018	Wesley Haynes	No	HOP001	Hope Works (Pt		
	E PRJ	0000351	Sprint SP1912 New Deal Sale	0	Open	13/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
	E PRJ	0000350	Project meth	0	Open	18/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Progress Chart	E PRJ	0000344	1234	0	Open	07/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
	E PRJ	0000330	TT031 - Mono 1000, Colour 1	0	Open	05/05/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		

5. The Time Sheet Reports screen will be displayed.

For a detailed handling of this topic refer to Projects - Employee Time Sheet



				Time	Sheet Repor	ts - BPO: Version 2.5.0.4	- Example Comp	pany v2.5.0.0					_	x
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PROJECT TIME

This process allows the Project Leader or Manager the facility to generate a Project Time Report that will list time logged against the project for each employee and work order.

- 1. From the *Project Listing for Customer [customer code]* screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Click on the *row* of the Project you wish to view the project time for.
- 4. Click on *Project Time*.



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		Sprint SP 1912 New Deal Sale	0	Open	30/10/2021	David Rowe	No	HOP001	Hope Works (Pt		
	PRJ0000412	Install Machines	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
Work Orders		Site Inspection	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
	PRJ0000410	New machine installation	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
		Maintenance Project - SP400	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
Work In Progress		TT002 - Weekly - Call per WO	0	Open	06/03/2017	Belinda Sharman	No	HOP001	Hope Works (Pt		
		1234 - Test ctrt request crea	0	Open	14/08/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
		NDS Project	0	Open	30/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Documents		Default for HOP001 on 08 Fe	0	Open	09/02/2017	Ben Johnson	No	HOP001	Hope Works (Pt		
bocancina		Default for HOP001 on 08 Fe	0	Open	09/02/2017	Ben Johnson	No	HOP001	Hope Works (Pt		
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Notes		Default for HOP001 on 08 Fe	0	Open	11/01/2019	Ben Johnson	No	HOP001	Hope Works (Pt		
		Default for HOP001 on 08 Fe	0	Open	09/02/2017	Ben Johnson	No	HOP001	Hope Works (Pt		
		Test save from CRM	0	Open	10/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Assignment History		test	0	Open	20/06/2018	Wesley Haynes	No	HOP001	Hope Works (Pt		
	PRJ0000351	Sprint SP 1912 New Deal Sale	0	Open	13/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
		Project meth	0	Open	18/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
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	E PRJ0000330	TT031 - Mono 1000, Colour 1	0	Open	05/05/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		

5. The *Project Time Report* screen will be displayed.

For a detailed handling of this topic refer to Projects - Project Time Report



⊉ =	5		Proje	ct Time Repo	ort - BPO: Version 2.5.0.4	- Example Com	pany v2.5.0.0					_ D X
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PROGRESS REPORT

In order to correctly track your progress via the Project Progress Report, ensure that the Work Order <u>Assign Required Craft</u> details have been configured on each work order within the project.

- 1. From the *Project Listing for Customer [customer code]* screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. The Progress Report can include all projects or **Projects My Projects** only.
- 4. Click on Progress Report.



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		Test Projects viewed in Cust	0	Open	18/09/2014	Belinda Sharman	No	HOP001	Hope Works (Pt			
		Machine installations	0	Open	08/02/2015	Belinda Sharman	No	HOP001	Hope Works (Pt			
Work Orders	E PRJ0000090	Sprint SP 1912 New Deal Sale	0	Open	11/01/2015	Belinda Sharman	No	HOP001	Hope Works (Pt			
	PRJ0000091	Service for HOP001 on 06 No	0	Open	07/11/2014	Bianca Du Toit	No	HOP001	Hope Works (Pt			
	PRJ0000092	Scheduled Maintenance for H	0	Open	07/11/2014	Bianca Du Toit	No	HOP001	Hope Works (Pt			
Work In Progress	PRJ0000098	Site Inspectino	0	Open	18/03/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt			
		Install Machines	0	Open	21/03/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt			
		Scheduled Maintenance for H	0	Open	15/05/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt			
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Documenta		Scheduled Maintenance for H	0	Open	12/09/2014	Bianca Du Toit	No	HOP001	Hope Works (Pt			
		Test stock issue	0	Open	14/05/2015	Belinda Sharman	No	HOP001	Hope Works (Pt			
		Hope Works Weekly Service	0	Open	08/08/2014	Belinda Sharman	No	HOP001	Hope Works (Pt			
Notes		Sprint SP 1912 New Deal Sale	0	Open	16/05/2015	Belinda Sharman	No	HOP001	Hope Works (Pt			
		Scheduled Maintenance for H	0	Open	08/05/2015	Julanda Kessler	No	HOP001	Hope Works (Pt			
		Scheduled Maintenance for H	0	Open	05/09/2014	Bianca Du Toit	No	HOP001	Hope Works (Pt			
Assignment History		Scheduled Maintenance for H	0	Open	05/06/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt			
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Progress Chart		test	0	Open	15/09/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt			
		New Deal Part Requests	0	Open	21/10/2015	George James	No	HOP001	Hope Works (Pt			

Give the system a few minutes to generate and exported the Progress Report to *Microsoft Excel*.

For a detailed handling of this topic refer to Projects - Progress Report

PRINT DELIVERY NOTE

If you have multiple items issued to the same project, printing the Project Delivery Note will allow you to view all the issues on a single document.

- 1. From the *Project Listing for Customer [customer code]* screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Click on the *row* of the project you wish to print a Net Delivery Report for.
- 4. Click on *Print Delivery Note*.



dd Edit San	rkspaces 🔻	Contract Finance / HR Inve pply Project Methodology djust Project Baseline Close Project Processing	Proj	Maintenance / F ployee Time ject Time gress Report alvsis	Print Delivery Note	Durba		Refresh Re	eports	Utilities	- 8
	4 Listing Hiera		-	4			content		porto a		
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unctions	3 ProjectRef		Status	StatusDesc	EndDate	ManagerName	Notify	CustomerCode	CustomerName	DeptName	
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Work Orders			0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
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Work In Progress			0	Open	06/03/2017	Belinda Sharman	No	HOP001	Hope Works (Pt		
				Open	14/08/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
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Documents				Open	09/02/2017	Ben Johnson	No	HOP001	Hope Works (Pt		
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				Open	09/02/2017	Ben Johnson	No	HOP001	Hope Works (Pt		
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				Open	11/01/2019	Ben Johnson	No	HOP001	Hope Works (Pt		
				Open	09/02/2017	Ben Johnson	No	HOP001	Hope Works (Pt		
Assignment History			0	Open	10/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Assignment history			0	Open	20/06/2018	Wesley Haynes	No	HOP001	Hope Works (Pt		
			0	Open	13/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
			0	Open	18/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Progress Chart			0	Open Open	07/06/2018	Bianca Du Toit Bianca Du Toit	No	HOP001 HOP001	Hope Works (Pt Hope Works (Pt		

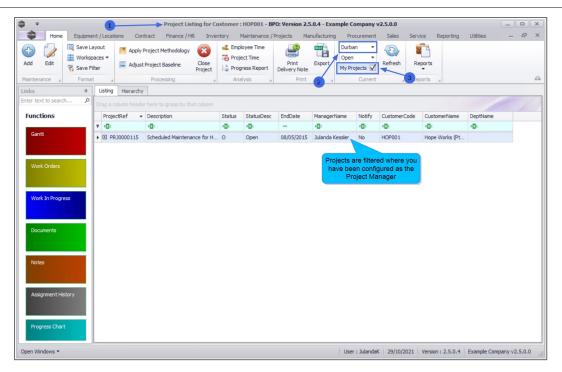
The Project Delivery Note will display in the *Report Preview* screen.

For a detailed handling of this topic refer to Projects - Print Delivery Note

MY PROJECTS

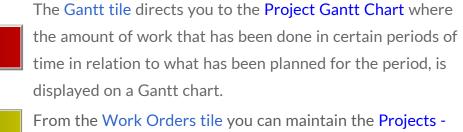
- 1. From the *Project Listing for Customer [customer code]* screen,
- 2. Ensure that the correct *Site* has been selected.
 - The example has *Durban* selected.
- 3. Click on the *My Projects* check box.
- 4. The projects will be filtered by the projects that have you assigned as the *Project Manager* (the person currently logged onto the system).





FUNCTIONS TILES

Move your mouse over the tiles in the *Functions* panel to display *up* and *down* arrows. Click on these arrows, or use the track ball / wheel on your mouse to scroll further down the list to reveal the remaining tiles.





Gantt

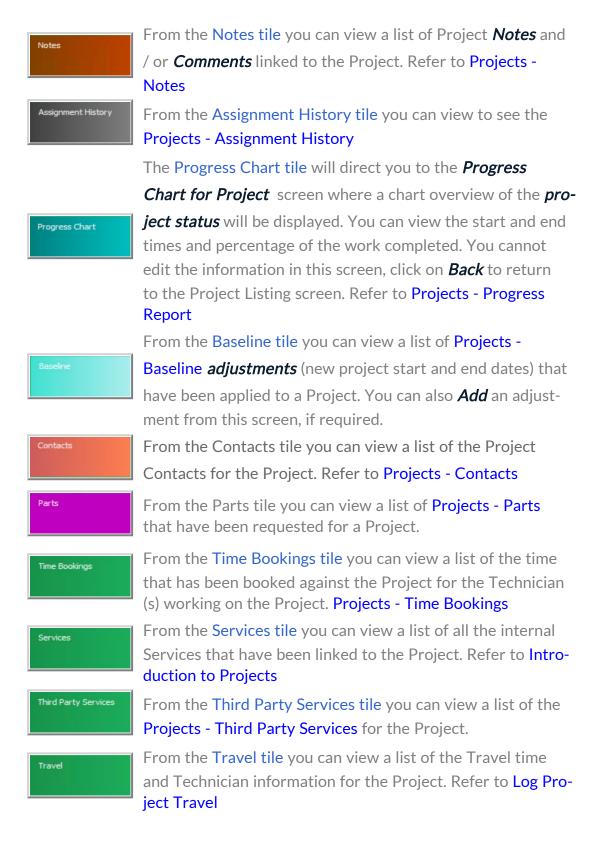
Work Orders(s) linked to the selected customer Project.

From the Work In Progress tile you can maintain the Projects - Work in Progress (WIP) for the customer project.

Documents

From the Documents tile you can Project - Documents to the selected customer Project.







Expenses

From the Expenses tile you can view a list of all the Expenses that have been logged against the Project. Refer to Projects - Expenses



From the Finance tile you can view the Finance information for the Project originated from the Sales Order (New Deal Project). Refer to New Deal Budget vs Actual



From the For Contract tile you can view a list of the Items awaiting a Contract for the Project. Refer to Projects - For Contract

Time Review

From the Time Review tile You can view how time has been allocated against each Work Order that has been linked to the project. Refer to **Projects - Time Review**

PROCESSING TILES

Quotes	From the Quotes tile you can view a list of all the Projects - Quotes linked to the project.
Orders	From the Orders tile you can view a list of all the Projects - Sales Orders that are linked to the project.
Invoices	From the Invoices tile you can view a list of all the Invoices that have been added to the project. Refer to Projects - Invoices
Credit Notes	From the Credit Notes tile you can view a list of all the Credit Notes linked to the project. Refer to Projects - Raise Credit Note

MNU.061.023