

# **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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		Scheduled Maintenance for TIA001 on 11 Sep 2014	0	Open	12/09/2014	Bianca Du Toit	No	TIA001	
		Scheduled Maintenance for TIA001 on 07 May 2015	0	Open	08/05/2015	Bianca Du Toit	No	TIA001	
Work In Progress		Scheduled Maintenance for TIA001 on 04 Jun 2015	0	Open	05/06/2015	Bianca Du Toit	No	TIA001	
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	PRJ0000338	New machine installation	0	Open	05/06/2018	Bianca Du Toit	No	TIA001	
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Notes	PRJ0000340	Install Machines	0	Open	05/06/2018	Bianca Du Toit	No	TIA001	
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	PRJ0000366	another test	0	Open	16/08/2018	Belinda Sharman	No	TIA001	
Progress Chart									



### **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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# **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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		Scheduled Maintenance for T	0	Open	12/09/2014	Bianca Du Toit	No	TIA001	Titan Group			
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Notes	PRJ0000340	Install Machines	0	Open	05/06/2018	Bianca Du Toit	No	TIA001	Titan Group			
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Assignment History	PRJ0000349	Install Machines	0	Open	04/06/2018	Bianca Du Toit	No	TIA001	Titan Group			
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	PRJ0000366	another test	0	Open	16/08/2018	Belinda Sharman	No	TIA001	Titan Group			
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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			New machine installation	n	0	Open	04/06/2018	Bianca Du Toit	No	TIA001	Titan Group				
		PRJ0000348	Site Inspectino		0	Open	01/06/2018	Bianca Du Toit	No	TIA001	Titan Group				
Assignment History		PRJ0000349	Install Machines		0	Open	04/06/2018	Bianca Du Toit	No	TIA001	Titan Group				
		PRJ0000355	test		0	Open	14/07/2018	Abigail Milne	No	TIA001	Titan Group				
		DR30000366	another test		0	Open	16/08/2018	Belinda Sharman	No	TIA001	Titan Group				
Progress Chart															

#### **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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	Project Reference						Hold R	eason			^	
Documents	•										Ŧ	
	Customer			Q			Notes			NoteDate	No	ob
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	Status	Open										
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Assignment History	End Date	18/08/2021	•									
	Project Manager			•								
Progress Chart	Notifiable											
Baseline												
						4						
Open Windows 🕶						User : Julandak	( 19/07/202	21 Version	: 2.5.0.3	Example Company	/2.5.0.	0 //

#### 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.



<b>\$</b> 7	10	Add new project	- BPO: Version 2.5.0.3	Example Company	iy v2.5.0.0			_	
Home Equipme	ent / Locations Contract	Finance / HR Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales Service	Reporting	Utilities —	₽ x
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Open Windows 🕶					User : Julanda	K 19/07/2021 Ve	rsion : 2.5.0.3	Example Company v2	.5.0.0

#### **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*.



Processing , W ker here to group by that column Description O SP240 New Deal SP240 New Deal Scheduled Maintenance for T Scheduled Maintenance for T	Status C C C C C C C C C C C C C	StatusDesc • Copen Open Open Open Open Open Open Open Open Open	Print EndDate 5/06/2017 14/11/2014 07/11/2014 15/08/2014 12/09/2014 08/05/2015	ManagerName Bianca Du Toit Bianca Du Toit Bianca Du Toit Bianca Du Toit Bianca Du Toit	Notify Notify n No No No No No	CustomerCode CustomerCode TIA001 TIA001 TIA001 TIA001 TIA001	CustomerName	DeptName	
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Sprint SP1912 New Deal Sale	0	Open	22/04/2017	Belinda Sharman	No	TIA001	Titan Group		
1234	0	Open	24/04/2018	Bianca Du Toit	No	TIA001	Titan Group		
Sprint SP1912 New Deal Sale	0	Open	19/04/2018	Bianca Du Toit	No	TIA001	Titan Group		
New machine installation	0	Open	05/06/2018	Bianca Du Toit	No	TIA001	Titan Group		
Site Inspectino	0	Open	02/06/2018	Bianca Du Toit	No	TIA001	Titan Group		
Install Machines	0	Open	05/06/2018	Bianca Du Toit	No	TIA001	Titan Group		
New machine installation	0	Open	04/06/2018	Bianca Du Toit	No	TIA001	Titan Group		
Site Inspectino	0	Open	01/06/2018	Bianca Du Toit	No	TIA001	Titan Group		
Install Machines	0	Open	04/06/2018	Bianca Du Toit	No	TIA001	Titan Group		
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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*.



ф т	5	Edit proj	ect:PRJ0000	071 - BPO: Version 2.5.	0.3 - Example Co	mpany v2.5.0.	0					x
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	Customer	Titan Group		Q			Notes			NoteDat		lot
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	Project Manager	Bianca Du Toit		•								
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Open Windows 🕶						User : Julandał	K 19/07/2	2021 Ver	sion: 2.5.0.3	Example Company	y v2.5.0.	.0 /

# **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*.



Home Equipme Que Control Cont	paces - Adjust	act Finance / HR Inventor Project Methodology Close Project Baseline Close Project Processing	🤹 Emp	intenance / Proj Noyee Time Ject Time gress Report alysis	Print Delivery Note Print	Export 2			Reporting Utiliti		8
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Gantt	PRJ0000412	Install Machines	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
		Site Inspection	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
		New machine installation	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
Work Orders	▶ E PRJ0000408	Maintenance Project - SP400	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
		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		
Work In Progress	E PRJ0000393	NDS Project	0	Open	30/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
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		test	0	Open	20/06/2018	Wesley Haynes	No	HOP001	Hope Works (Pt		
		Sprint SP1912 New Deal Sale	0	Open	13/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Assignment History		Project meth	0	Open	18/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
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		TT002 - Weekly - Call per WO	0	Open	20/06/2017	Belinda Sharman	No	HOP001	Hope Works (Pt		

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

		5	Ap	oly Methodolo	gy - BPO: Version 2.5.0.4	- Example Com	pany v2.5.0.0				_		x
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Open Windows 🕶						1	Jser : JulandaK	28/10/2021	Version : 2.5.0.4	Example Co	mpany v2	.5.0.0	11.



- 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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		H	E PRJ0000411	Site Inspection	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
Work Orders		H	PR 10000410	New machine installation	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
			E PR30000408	Maintenance Project - SP400	0	Open		David Rowe	No	HOP001	Hope Works (Pt		
		H	E PRJ0000403	TT002 - Project		8		>	< 10	HOP001	Hope Works (Pt		
Work In Progress			PRJ0000394	1234 - T	1				0	HOP001	Hope Works (Pt		
Work In Progress		H	PRJ0000393	NDS Pro	K				lo	HOP001	Hope Works (Pt		
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			E PRJ0000363	Test save from CRM	0	Open	10/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
			E PRJ0000352	test	0	Open	20/06/2018	Wesley Haynes	No	HOP001	Hope Works (Pt		
Assignment Histor	У			Sprint SP 1912 New Deal Sale	0	Open	13/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
			E PRJ0000350	Project meth	0	Open	18/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
			E PRJ0000344	1234	0	Open	07/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Progress Chart			E PRJ0000330	TT031 - Mono 1000, Colour 1	0	Open	05/05/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
			E PR 30000329	TT030 - 'Colour 1000 - Gener	0	Open	05/05/2018	Steven Cooper	No	HOP001	Hope Works (Pt		

# **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.



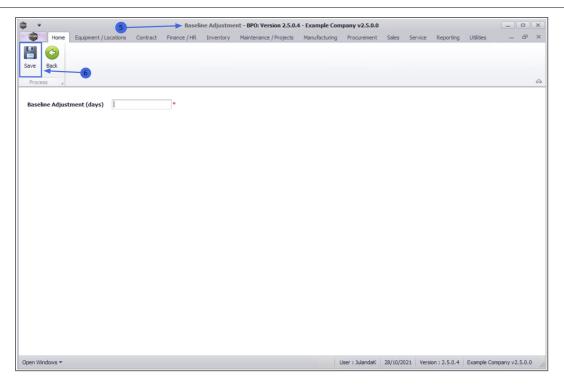
4. Click on Adjust Project Baseline.

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

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	I PR J000041	11 Site Inspection	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
	PRJ000041	10 New machine installation	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
	▶ 🗄 PR3000040	08 Maintenance Project - SP400	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
		03 TT002 - Weekly - Call per WO	0	Open	06/03/2017	Belinda Sharman	No	HOP001	Hope Works (Pt		
Work In Progress		1234 - Test ctrt request crea	0	Open	14/08/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
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	E PRJ000036	53 Test save from CRM	0	Open	10/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
		52 test	0	Open	20/06/2018	Wesley Haynes	No	HOP001	Hope Works (Pt		
Assignment History		51 Sprint SP 1912 New Deal Sale	0	Open	13/06/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
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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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		Maintenance Project - SP400	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
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Assignment History		test	0	Open	20/06/2018	Wesley Haynes	No	HOP001	Hope Works (Pt		
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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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#### **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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		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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		Maintenance Project - SP400	0	Open	26/02/2022	David Rowe	No	HOP001 HOP001	Hope Works (Pt		
		TT002 - Weekly - Call per WO	0	Open	06/03/2017	Belinda Sharman	No	HOP001	Hope Works (Pt		
Work In Progress	E PR30000394	1234 - Test ctrt request crea		Open	14/08/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
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	E 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		
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5. The *Project Time Report* screen will be displayed.

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



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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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Work In Progress		Install Machines	0	Open	21/03/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt		
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Progress Chart	PRJ0000132	test	0	Open	15/09/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt		
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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*.



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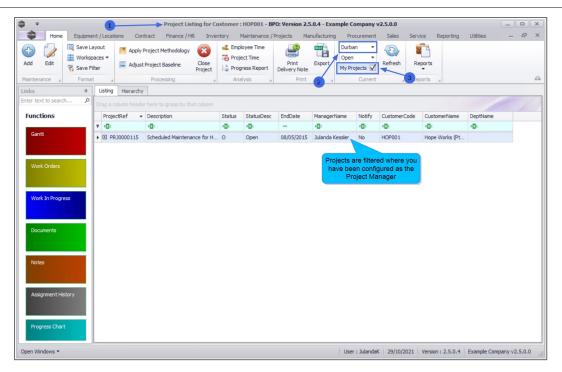
The Project Delivery Note will display in the *Report Preview* screen.

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.





Documents

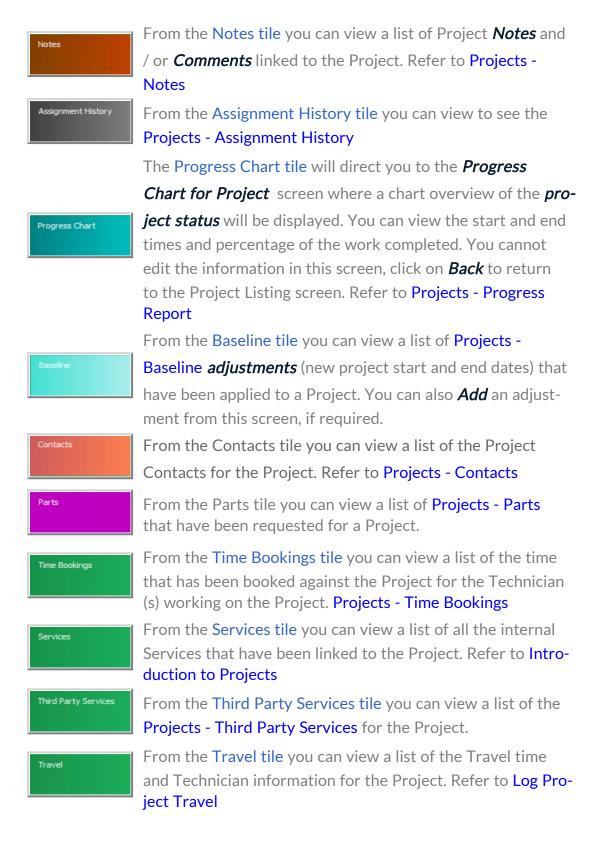
Gantt

From the Work Orders tile you can maintain the Projects -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.

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