We are currently updating our site; thank you for your patience.

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 cannot 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

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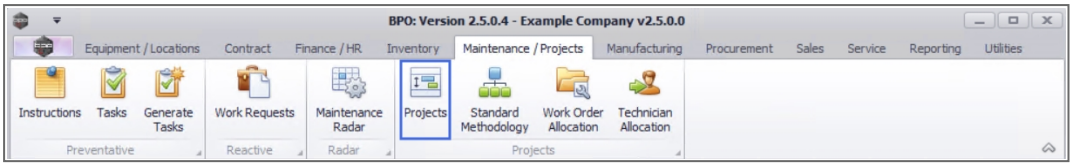
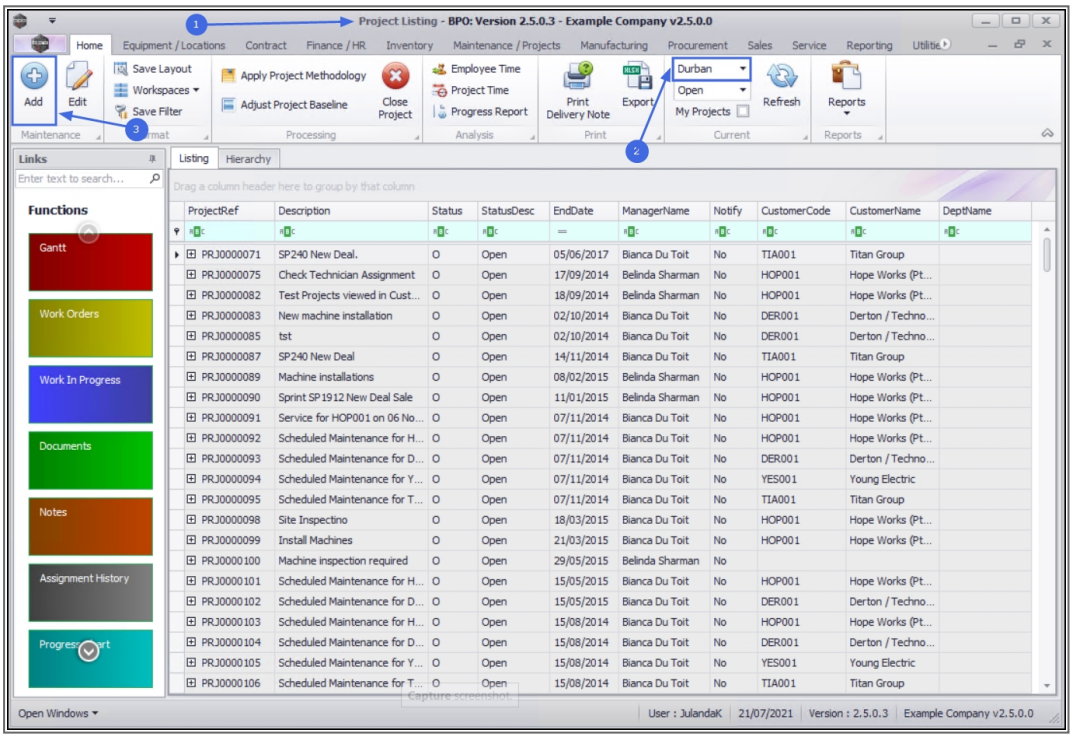


1. The **Project Listing** screen will be displayed.
2. Select the **Site** you wish to create the project for.
    - The example has **Durban** selected.
3. Click on **Add**.

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

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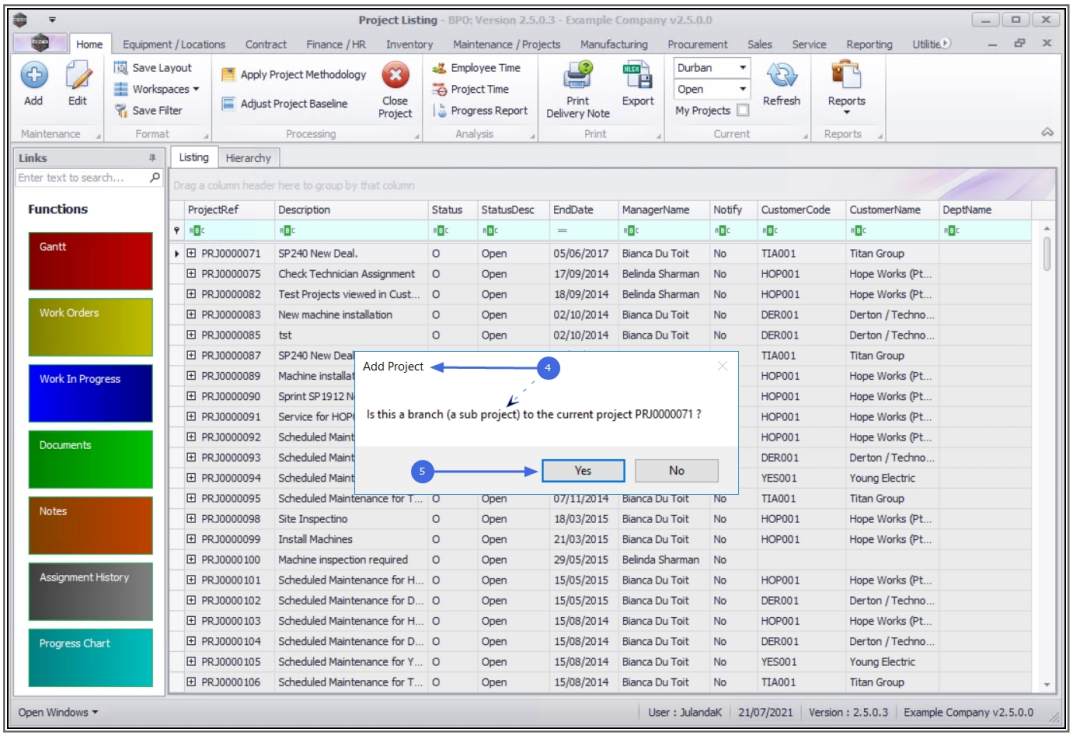
whether you are creating a sub-project for the selected project.

4. 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.

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

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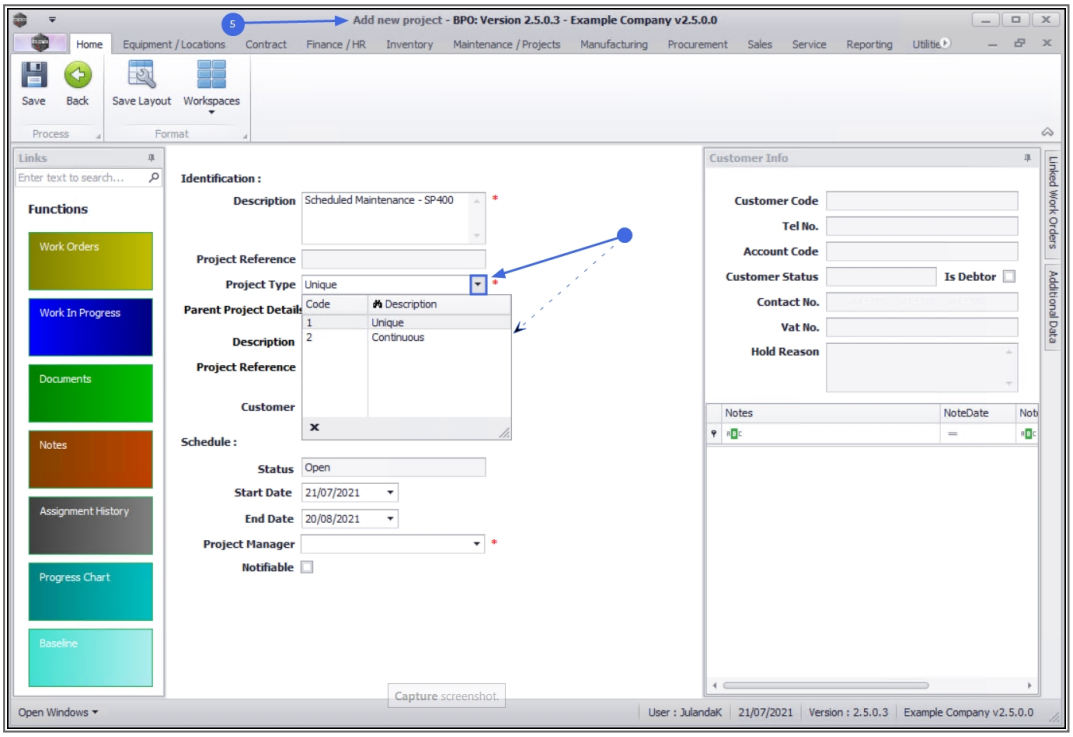
- **Project Reference:** Type in the Project reference Number.

> 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.

- **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.

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[1]Unique - 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.

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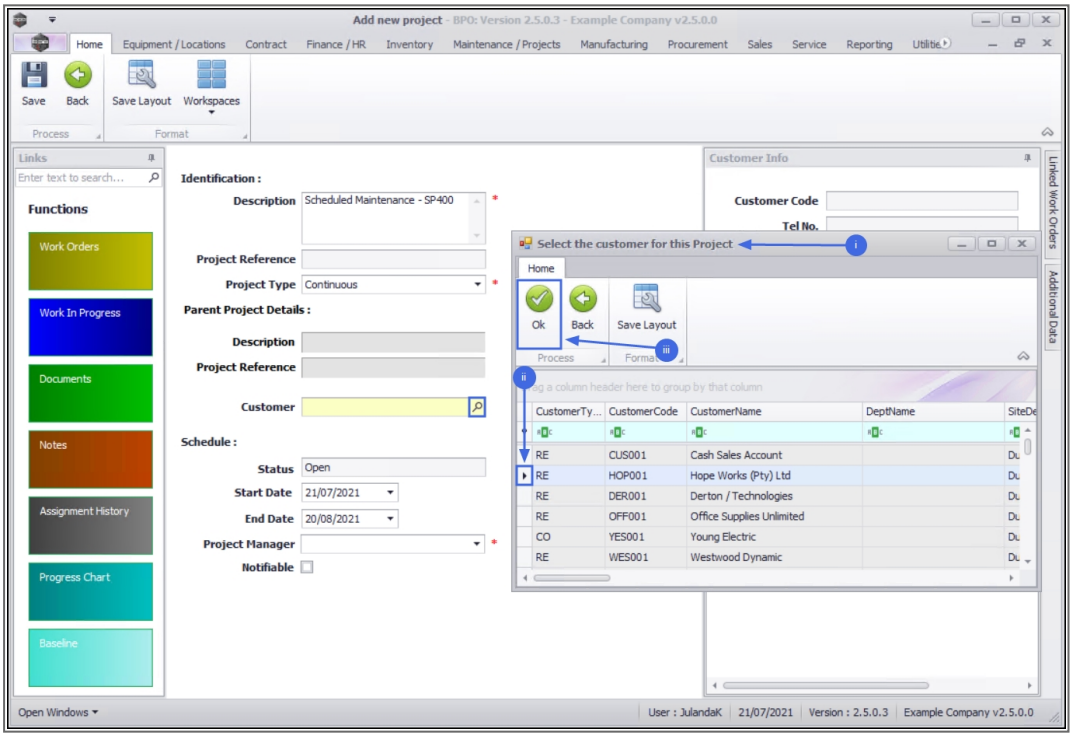
- **Customer:** Click on the **Search** button to select the customer you wish to link to the project.

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

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



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.

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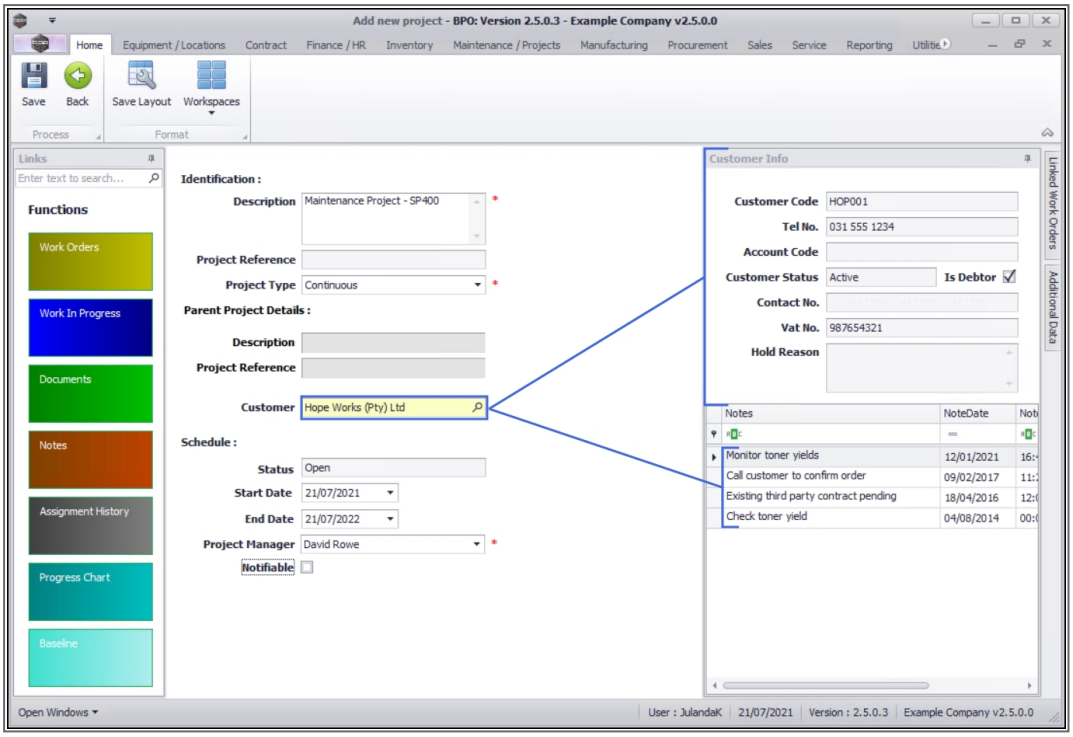
Any **Notes** linked to this customer can also be viewed here.



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.

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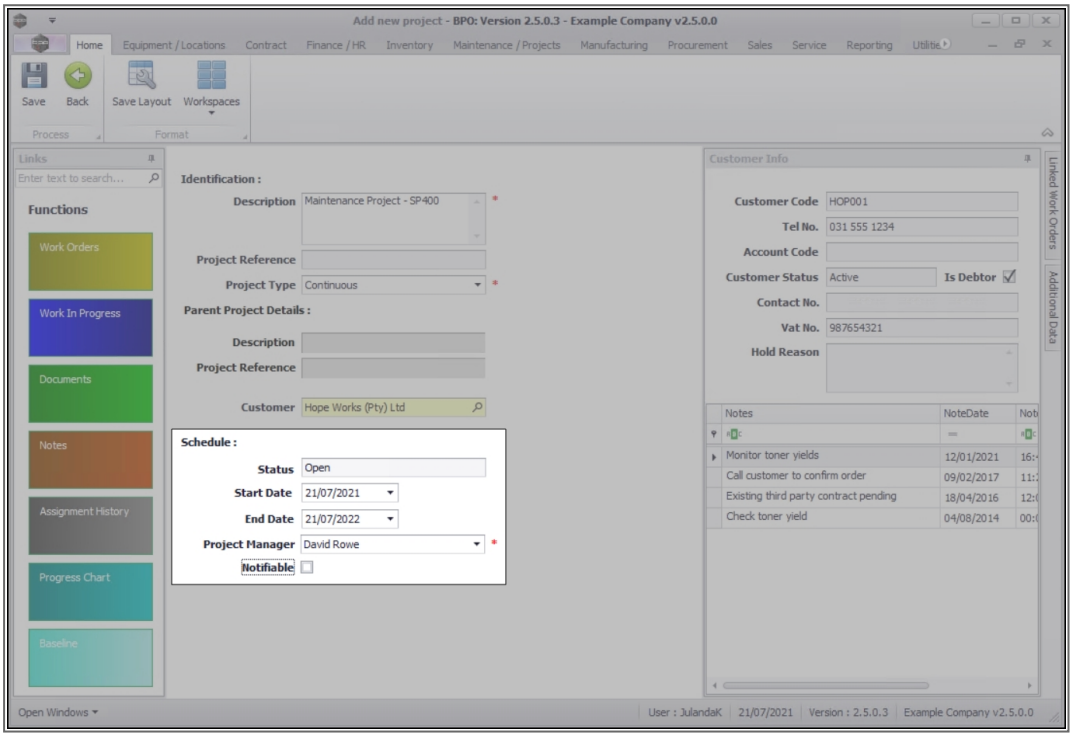
- **Notifiable:** This option is not used by the system.

> 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

7. 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.

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

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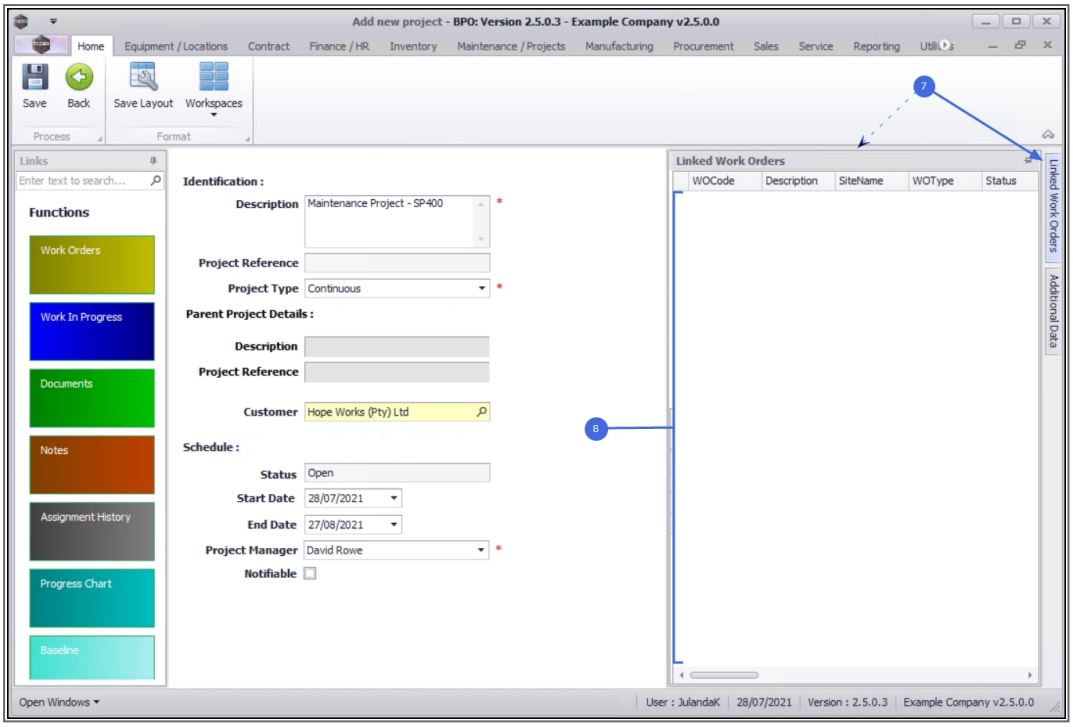

ADDITIONAL DATA

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.

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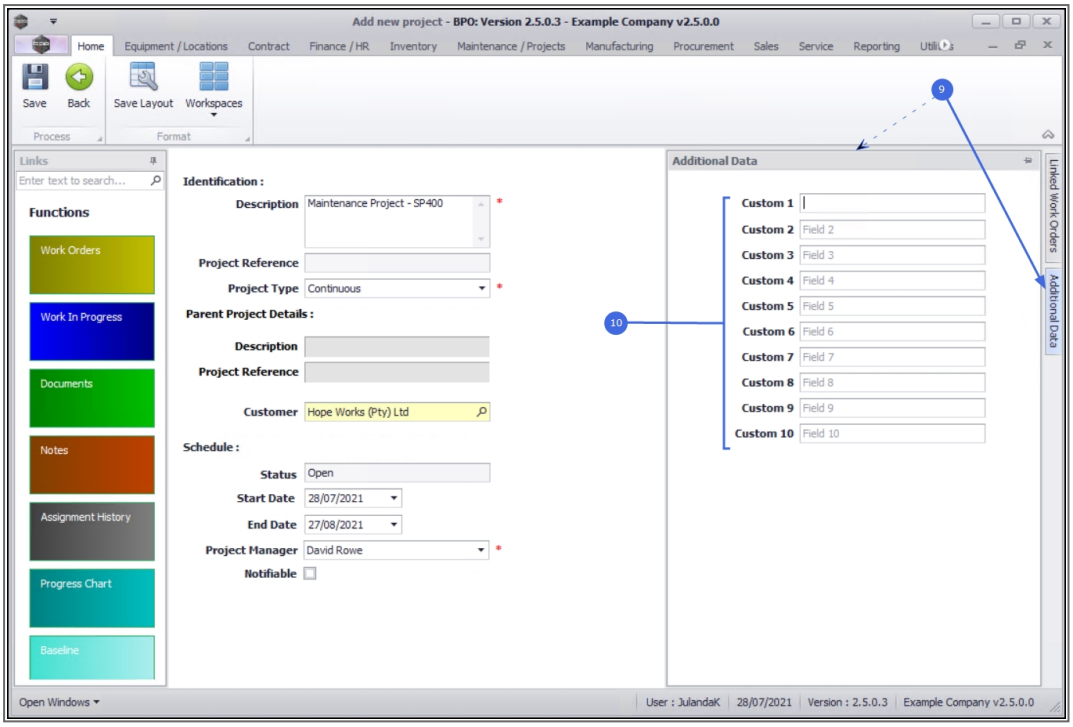

SAVE MAIN PROJECT

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**.

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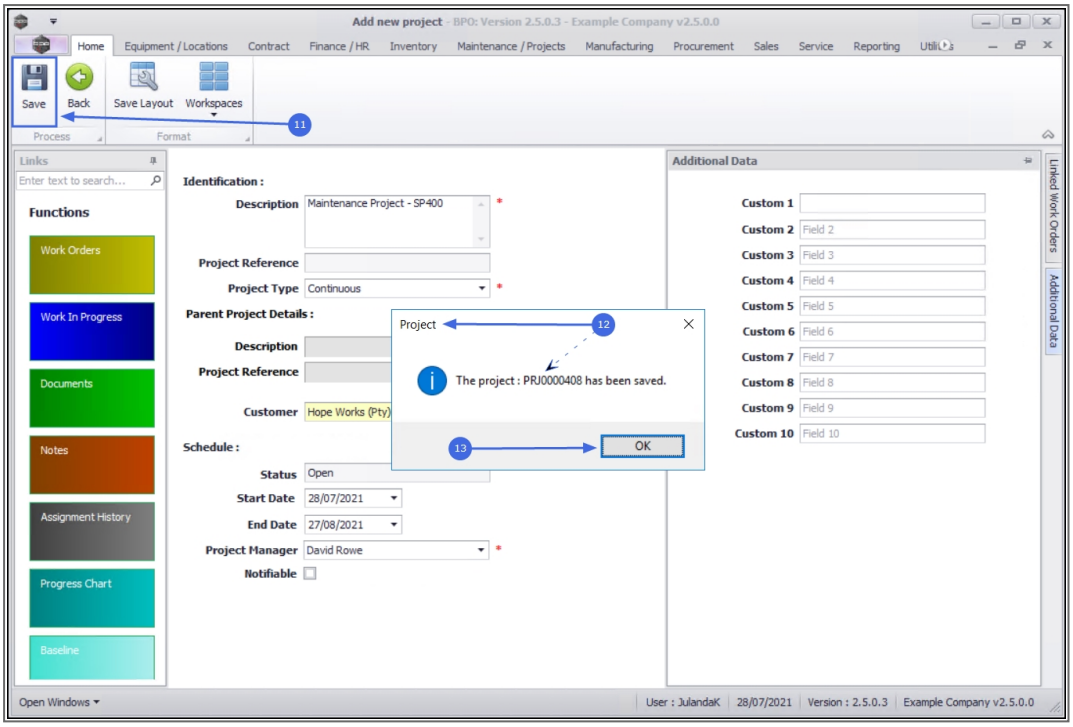
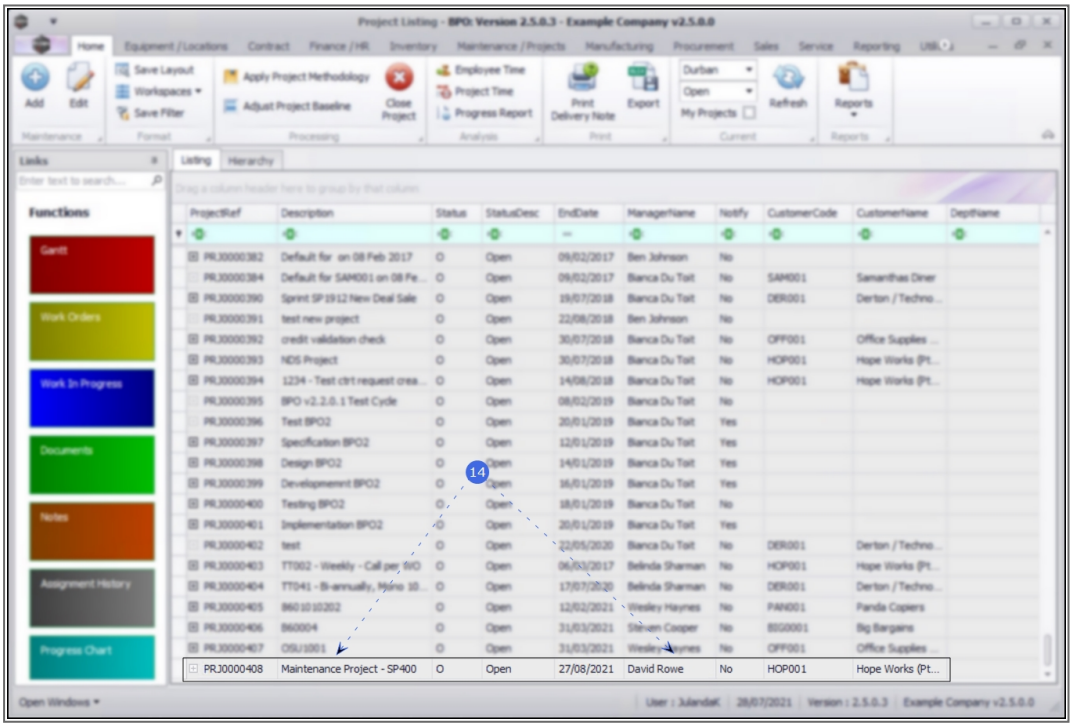


14. You will return to the **Project Listing** screen where you can now view the newly created project in the Project list.



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Related Topics

- Projects - Add Sub-Project
- Projects - Edit Project
- Projects - Close Project
- Assign Technician

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