

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

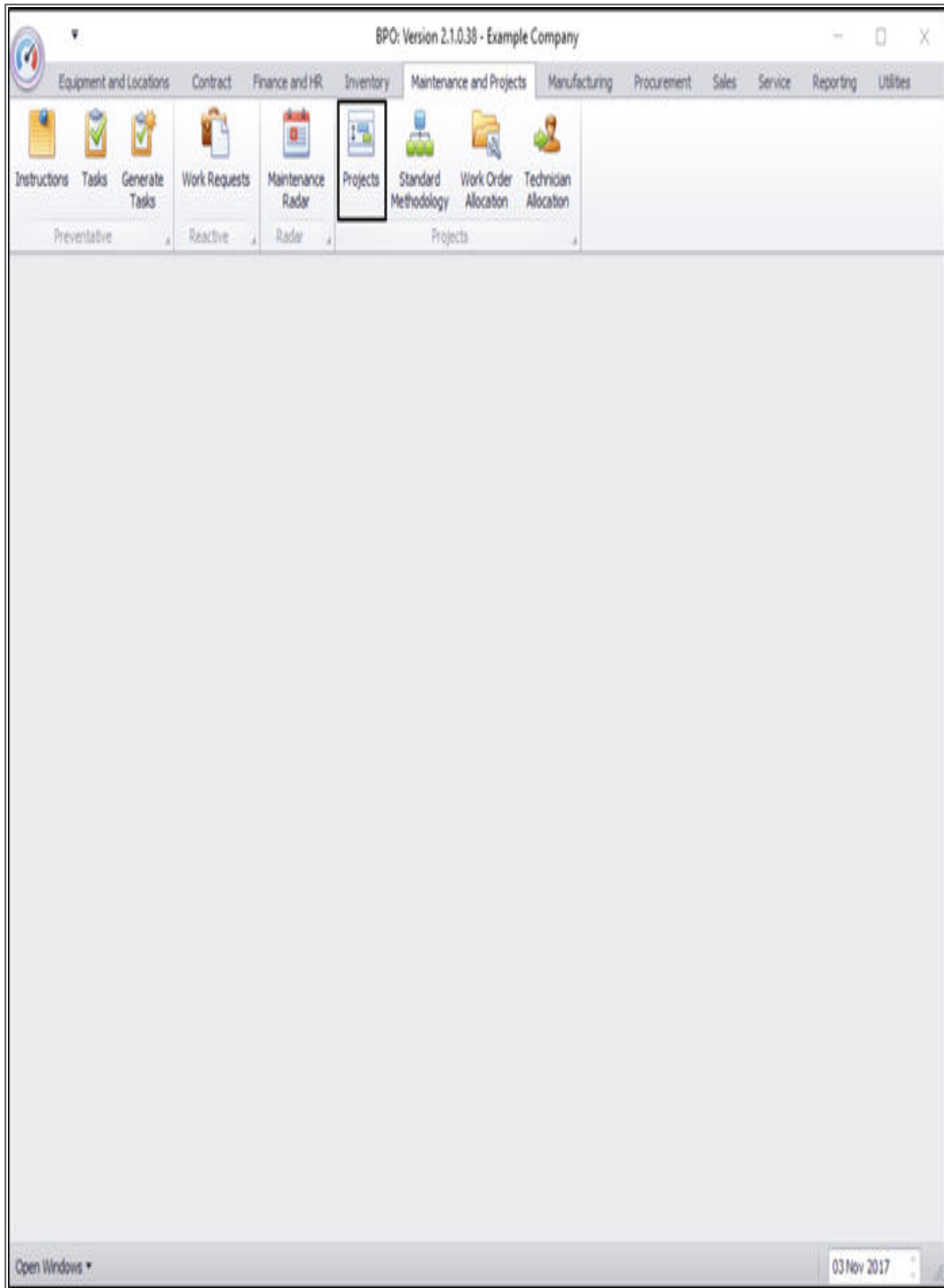
PROJECTS

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.

The screenshot shows the 'Project Listing - BPO; Version 2.1.0.40 - Example Company' interface. The top navigation bar includes tabs for Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A dropdown menu for site selection is open, showing 'Durban' as the selected option. Below the navigation bar is a toolbar with various icons for actions like Add, Edit, Save Layout, Apply Project Methodology, Adjust Project Baseline, Close Project, Progress Report, Print Delivery Note, Export, Refresh, and Reports. The main area displays a table of projects with columns for ProjectRef, Description, Status, StatusDesc, StartDate, EndDate, CustomerName, CustomerCode, ManagerName, Notify, and Depth. The table contains 20 rows of project data. On the left side, there are several colored buttons for navigation: Parts (purple), Finance (red), For Contract (green), Processing (green), Quotes (green), Orders (green), Invoices (green), and Credit Notes (green). The bottom status bar shows 'Open Windows' and the date '13 Nov 2017'.

ProjectRef	Description	Status	StatusDesc	StartDate	EndDate	CustomerName	CustomerCode	ManagerName	Notify	Depth
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 - TI...	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

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

The screenshot displays the 'Project Listing' window. The main table contains the following data:

ProjectRef	Description	Status	StatusDesc	StartDate	EndDate	CustomerName	CustomerCode	ManagerName	Notify	Depth
PRJ0000071	SP240 New Deal	0	Open	29 May 2017	05 Jun 2017	Titan Group	TIA001	Susan Du Toit	No	
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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 - TI...	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 installatons	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
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PRJ0000099	Install Machines	0	Open	19 Mar 2015	21 Mar 2015	Hope Works	HOP001	Susan Du Toit	No	Tech

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 Cur...

Drag a column header here to group by that column

fdLineType	fdItemCode	fdItemDesc	fdPlanned	fdActual	fdInvoiced
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

Open Windows 15 Nov 2017

MNU.058.017