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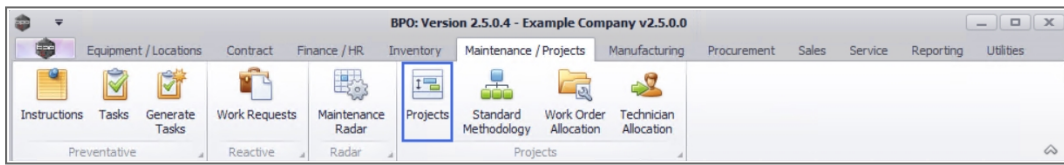
PROJECTS

PROJECTS – EDIT PROJECT

The Edit project feature allows you to make changes to the Main and/or sub-project details in either the **Open** or **Closed** status.

Making changes to the details of a Closed project does not change the status to Open. The project will remain in the Closed status.


Ribbon Access: Maintenance / Projects > Projects

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1. The **Project Listing** screen will be displayed.
2. Select the **Site** where the project you wish to edit can be located.
   - The example has **Durban** selected.
3. Select the **Status** for the project you wish to edit.
   - The example has **Open** selected.
4. Click on the **row** of the project you wish to update.
5. Click on **Edit**.

> **Short cut key: Right click** to display the **All groups** menu list. Click on **Edit**.
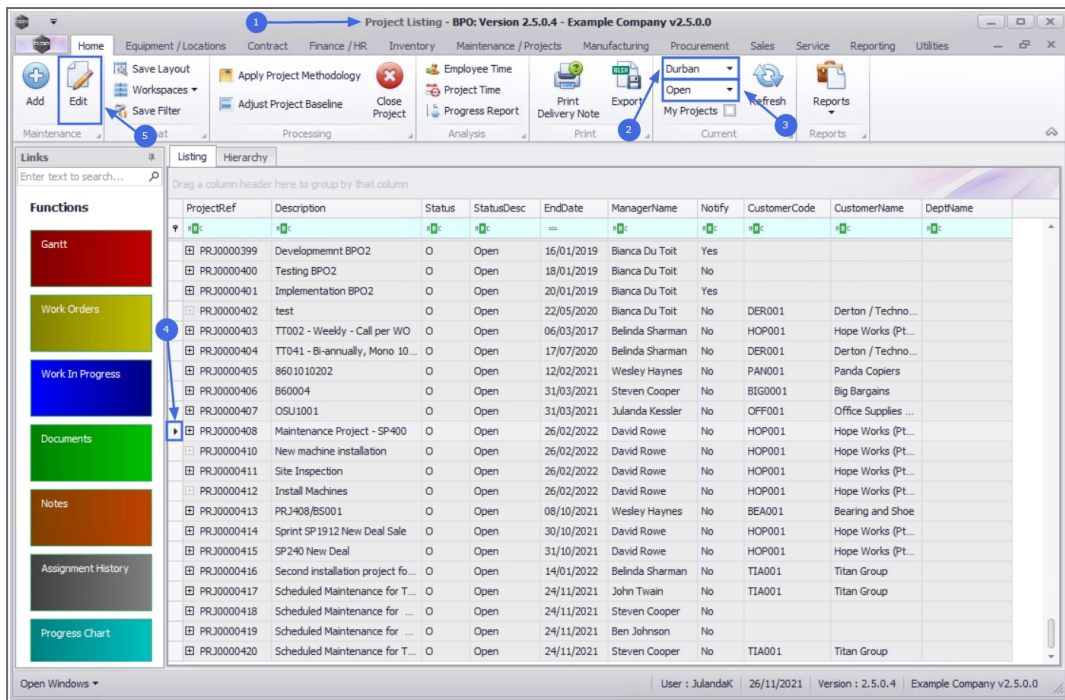
6. The **Edit project : [**project ref number**]** screen will be displayed.

IDENTIFICATION

- **Description:** Type in a description[1], or make the necessary change to this field, if required.
- **Project Reference:** The project reference field cannot be edited.
- **Project Type:** Click on the down **arrow** to select, or change the project type[2].
- **Customer:** Click on the **Search** button to select the customer you wish to link to the project.

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[1]The project description is a short explanation what the project is all about, e.g. Scheduled Maintenance that needs to be performed.
[2]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.

SCHEDULE

- **Status:** This is the status for the project and this field cannot be changed from this screen.
- **Start Date:** This will display the start date for the project. **Type** in or click on the down **arrow** to select an alternative start date for the project using the Calendar function.
- **End Date:** The date the project is scheduled to be completed is displayed. **Type** in or click on the down **arrow** to select an alternative end date for the project using the Calendar function.
- **Project Manager:** Click on the down **arrow** to select an alternative project manager for the project.
- **Notifiable:** This option is not used by the system.

CUSTOMER INFO FRAME

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

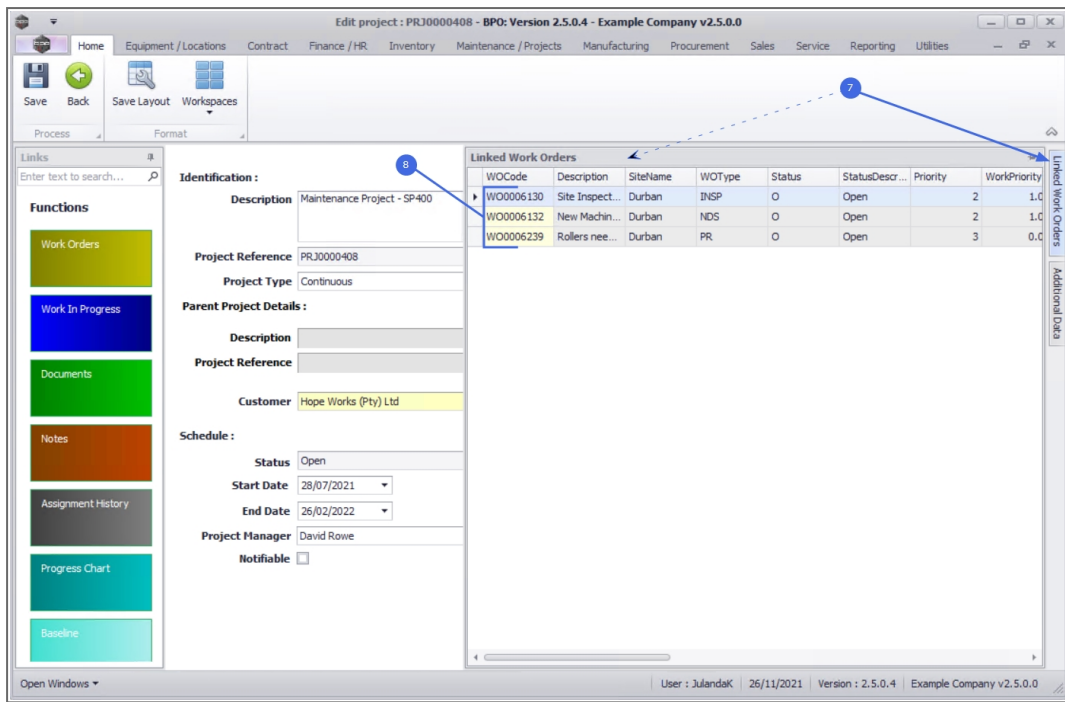- Any **Notes** linked to this customer can be viewed here.
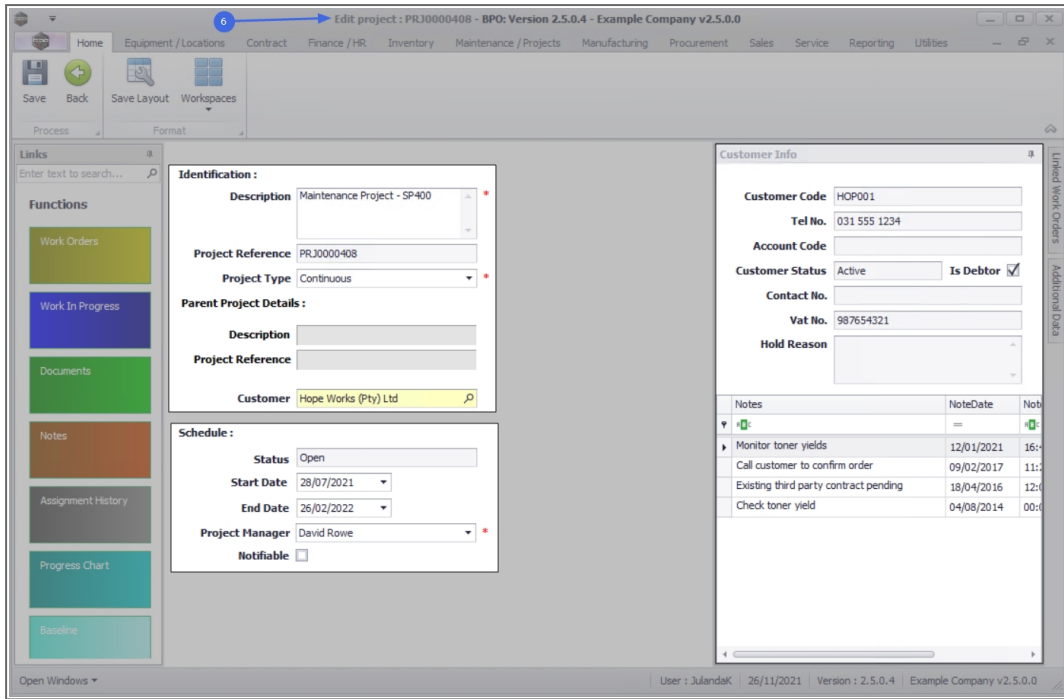
LINKED WORK ORDERS

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.

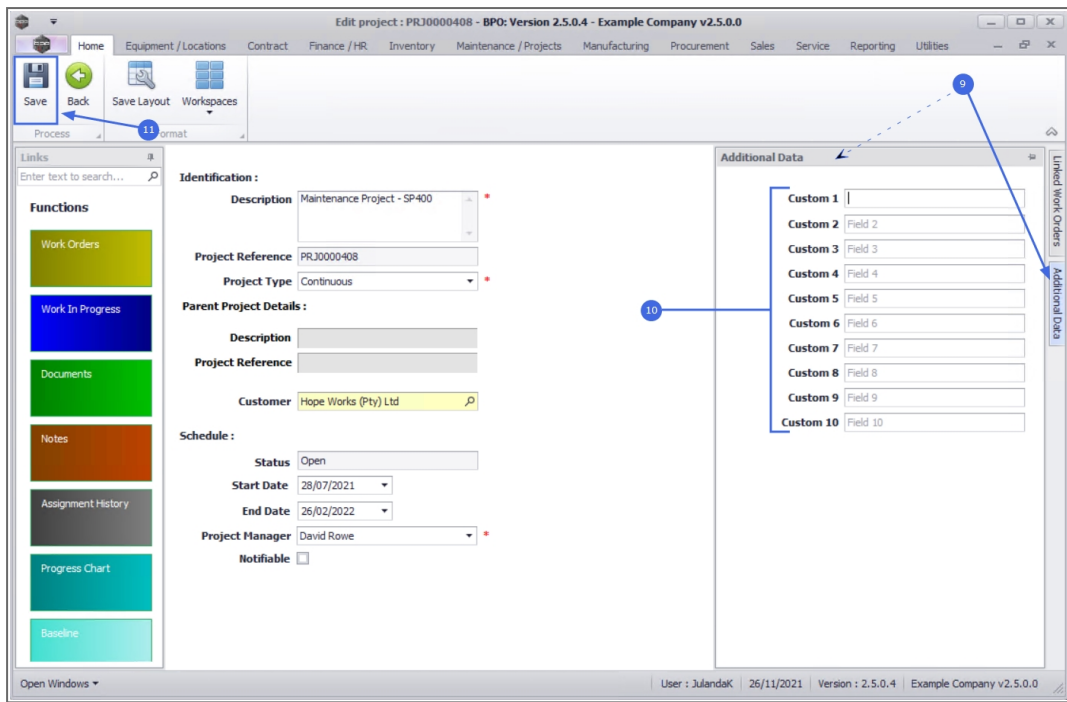8. Any work order(s) linked to this project will display in this frame.

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. The field names can be re-named to suit your company requirements.

Please contact your BPO Analyst or CO3 Support for assistance.

12. Click on **Save** to save the changes made.

MNU.058.018