

Project Setup

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System Configuration > General > Projects Setup

Projects are different from job costing.

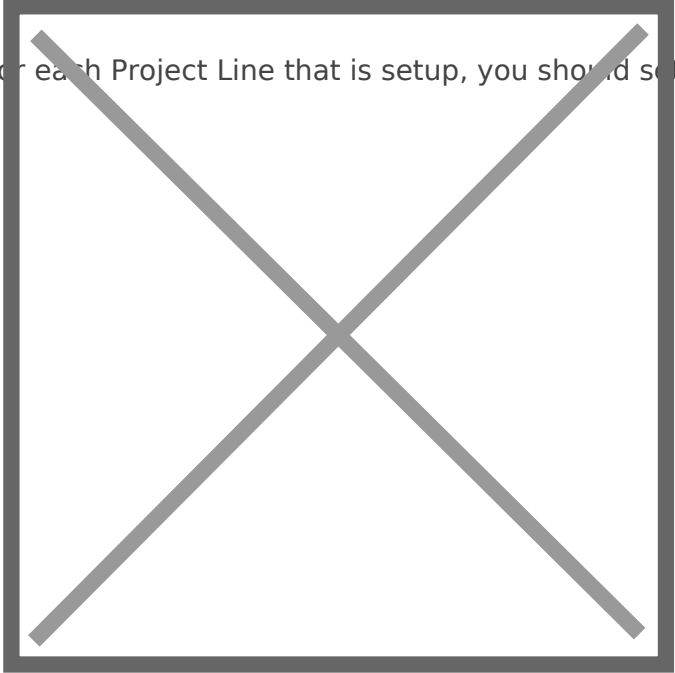
Where job costing relates to costs per job, a project can have multiple job costings allocated to it.

Projects are situated throughout the system and produce a Project Profit and Loss similar to an income statement.

In this section, you will first setup the Project Lines.

A Project Line is defined as the actual project name. Then you will setup a Project Group.

For each Project Line that is setup, you should setup a Project Group.



NOTE: Only Project Groups are shown in all the document assignments and not the Project Lines.

Project Lines Tab

Code	Allows the user to search by the project’s code.
Description	Allows the user to search by the project’s description.
Active	Search for Active or Inactive Projects
Search	Searches for Project Lines that matches the criteria entered in the Code, Description and Active fields.
Edit	Opens the edit screen where the user will be allowed to edit the selected project line.
Print Grid	Print the Current Grid
View Details	Not Available for Project Lines

Project Groups Tab

Note: If a project line is being used in a Project Group, it will be marked as inactive and not be deleted.

Code	Allows the user to search by the project's code.
Description	Allows the user to search by the project's description.
Active	Search for Active or Inactive Projects
Search	Searches for Project Groups that matches the criteria entered in the Code, Description and Active or inactive fields.
Edit	Opens the edit screen where the user will be allowed to edit the selected project Group.
Print Grid	Print the Current Grid as well as the project lines associated with the groups
View Details	View the project's related documents such a Quote, Invoice, etc.

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