

# Projects

Set up projects and allocate jobs and their costs to a project. Great for managing projects such as new builds or refurbishments.

Navigate to Finance → Projects.

The main list as seen below provides important information for each Project.

Project Name	Project Number	Reference	Start Date	End Date	Cost Information			
					Project Value	Job Costs	Purchase Orders	Remaining Budget
Cleaning			01/09/2022	01/12/2022	400,000.00	1,500.00	0.00	398,500.00
Electrical					50,000.00	0.00	0.00	50,000.00
Division A	d1	d123			50,000.00	1,000.00	200.00	48,800.00
North Contract					0.00	0.00	0.00	0.00

Click **Create** to be directed to the Create Project Screen.

The screenshot shows the 'Create Project' form with the following sections and fields:

- Project Information:** Project Name (Project 1), Project Number (MARp1), Reference (weff), Status (Pending), Is Active (Yes).
- Budget Information:** Project Value (100,000.00), Start Date (01/09/2023), End Date (30/06/2023), Percentage Complete (0.00%).
- Project Costs:** Job Costs (0.00), Purchase Orders (0.00), Other Costs (0.00), Remaining Budget (100,000.00). Includes an 'Allocate Budget to departments' button with an 'Apportionments' dropdown.
- Contact Information:** Contact Name (0000), Email (000@0000.com), Telephone (23234).
- Additional Information:** Finance Code 1-3, Default Job Budget (0.00), Team, Currency (Sterling), Colour (#20c99f).

Red arrows in the image point to the Project Information, Budget Information, Project Costs, and Contact Information sections.

Once saved you will be directed to the Project Details page where you will see the Resources, Documents & Settings Tab.

- Resources** – You can choose to select certain Resources for each Project here. Choose from the dropdown. The options for this setting:
  - **All Resources:** All resources will be available.

- **All Resources Except Selected:** All resources except the ones selected will be available.
- **Selected Resources Only:** Only the selected resources will be available

2. **Other Costs** – Create ad hoc costs that are not associated to any job.
3. **Documents** – Upload and store documents against each project.
4. **Settings** – Email, notification and project settings can be managed here.

The screenshot displays the 'Settings' interface, divided into three main sections:

- Email Settings:** Contains four rows of settings, each with a radio button for 'Yes' or 'No':
  - Send Email When Project is Close to Expiry
  - Send Email When Project is Expired
  - Send Email When Costs on Project Over Percentage
  - Send Email When Project Value has Exceeded
- Notification Settings:** Includes fields for 'Email Team' and 'Email Recipients', with a 'Help' button below.
- Other Settings:** Contains three rows of settings with radio buttons for 'Yes' or 'No':
  - Block Instruction if Project Expired
  - Block Instruction When Project Value has been Exceeded
  - Block New Job Costs If Project Value Exceeded

## Settings → Project settings.

Set up default email notification settings here (You can override these default Email notifications per project). Project numbering settings and Project approval band settings can also be set up here.

The screenshot shows the 'Project Settings' interface with three sections highlighted by red arrows:

- Project Settings:** Similar to the general settings, it includes email and block instruction settings for projects.
- Project Numbering Settings:** Includes a 'Prefix' field (set to 'MAR'), 'Enable Project Auto Numbering' (radio buttons), 'Next Project Number' (set to '25'), and 'Can Project Number be Edited' (radio buttons).
- Project Approval Band Settings:** A table listing approval bands with columns for Name, From Value, To Value, Can Confirm Lower Bands, Lower Band Confirmation Required First, and Confirmation Users.
 

Name	From Value	To Value	Can Confirm Lower Bands	Lower Band Confirmation Required First	Confirmation Users
PBand1	0	10000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2
PBand2	10001	20000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2