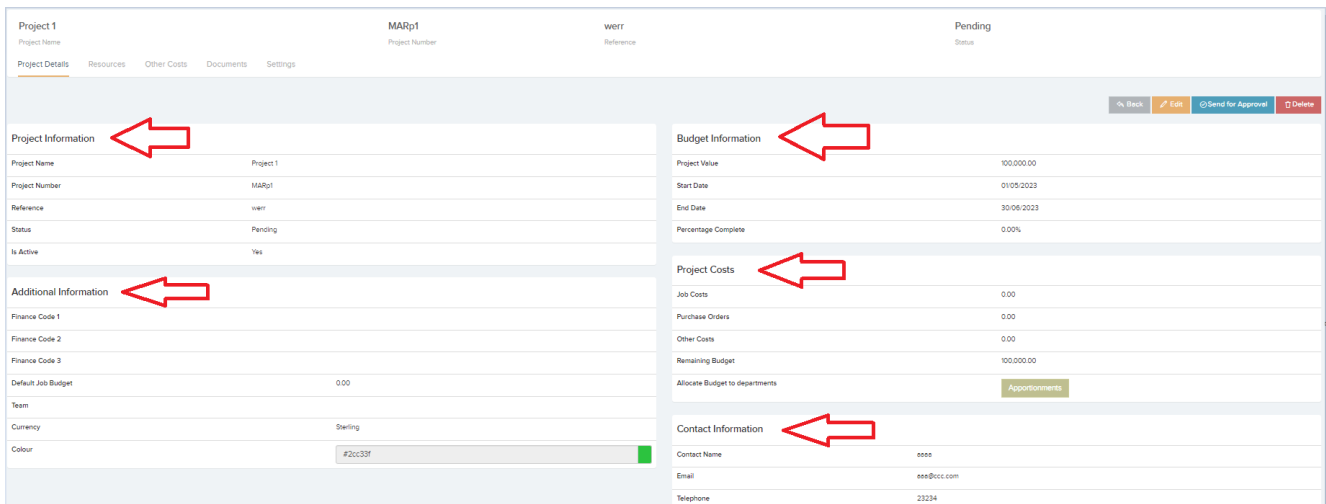# Projects

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.

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

1. **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.

Email Settings		Notification Settings
Send Email When Project is Close to Expiry	○ Yes ● No	Email Team
Send Email When Project Is Expired	○ Yes ● No	Email Recipients
Send Email When Costs on Project Over Percentage	○ Yes ● No	⑦ Help
Send Email When Project Value has Exceeded	○ Yes ● No	
⑦ Help		

Other Settings	
Block Instruction if Project Expired	○ Yes ● No
Block Instruction When Project Value has been Exceeded	○ Yes ● No
Block New Job Costs If Project Value Exceeded	○ Yes ● No
⑦ Help	

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.

Project Settings	
Send Email When Project is Close to Expiry	○ Yes ● No
Send Email When Project Is Expired	○ Yes ● No
Send Email When Costs on Project Over Percentage	○ Yes ● No
Send Email When Project Value has Exceeded	○ Yes ● No
Block Instruction if Project Expired	○ Yes ● No
Block Instruction When Project Value has been Exceeded	○ Yes ● No
⑦ Help	

Project Numbering Settings	
Prefix	MAR
Enable Project Auto Numbering	● Yes ○ No
Next Project Number	25
Can Project Number be Edited	● Yes ○ No
⑦ Help	

Project Approval Band Settings					
Name ▼	From Value ▼	To Value ▼	Can Confirm Lower Bands ▼	Lower Band Confirmation Required First ▼	Confirmation Users ▼
PBand1	0	10000	☐	☐	2
PBand2	10001	20000	☐	☐	2

⏮ ◀ 1 ▶ ⏭ 10 ▾ Items Per Page   1–2 of 2 Items

⑦ Help