

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 for 'Project 1'. The form is divided into several sections, with red arrows pointing to the following fields:

- Project Information:** Project Name (Project 1), Project Number (MARp1), Reference (weir), 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).
- Contact Information:** Contact Name (000), Email (000@000.com), Telephone (23234).

Additional sections include 'Additional Information' with Finance Code 1-3, Default Job Budget (0.00), Team, Currency (Sterling), and Colour (#20c33f).

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.

The screenshot displays three sections of the settings interface:

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

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 displays three sections of the Project Settings interface:

- Project Settings:** Contains six rows of settings, each with a radio button for 'Yes' or 'No'. The settings are: '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', 'Block Instruction if Project Expired', and 'Block Instruction When Project Value has been Exceeded'. A yellow 'Help' button is located below these settings.
- Project Numbering Settings:** Contains four rows: 'Prefix' (text input with value 'MAR'), 'Enable Project Auto Numbering' (radio buttons for 'Yes' and 'No'), 'Next Project Number' (text input with value '25'), and 'Can Project Number be Edited' (radio buttons for 'Yes' and 'No'). A yellow 'Help' button is located below these settings.
- Project Approval Band Settings:** Contains a table with columns: Name, From Value, To Value, Can Confirm Lower Bands, Lower Band Confirmation Required First, and Confirmation Users. The table has two rows: 'PBand1' and 'PBand2'. A yellow 'Help' button is located below the table.