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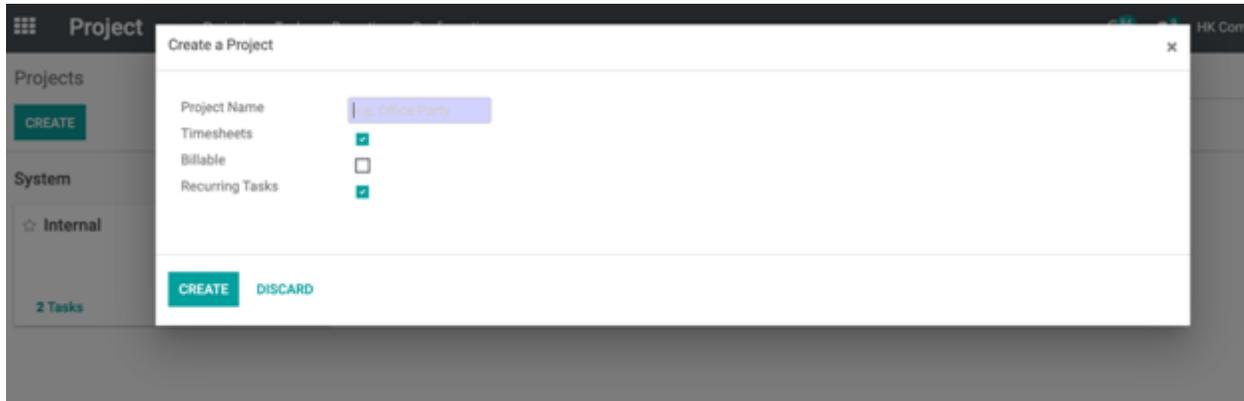
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Project Module

Project Module is used for project management, whether external or internal projects or campaigns (Manage all your projects, set Project leader, assign tasks to different employees, or even record time spent on each individual tasks)

i. Create a new project

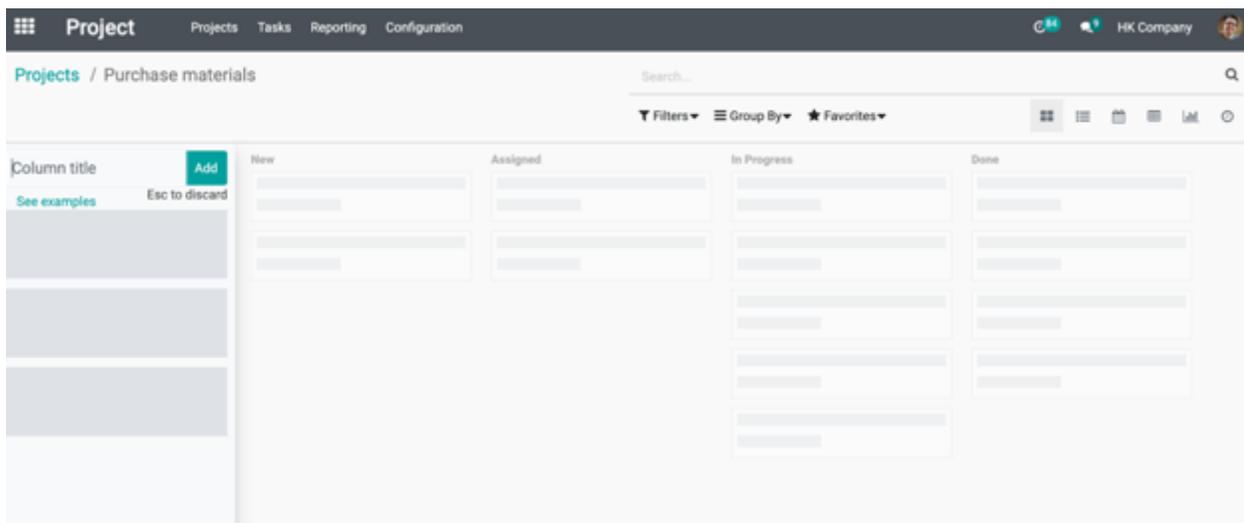
Click on **Create**. Specify the name of the project and choose which features you would like to integrate.



ii. Manage project stages

Open a project and add as many columns as there are stages in the project.

Each project stage can be characterized by a distinct set of activities, or your stages can guide you to the different steps a project has to go through. It is important to set them right as they lead you from the first idea or step to its conclusion, contributing to the overall success of your project.

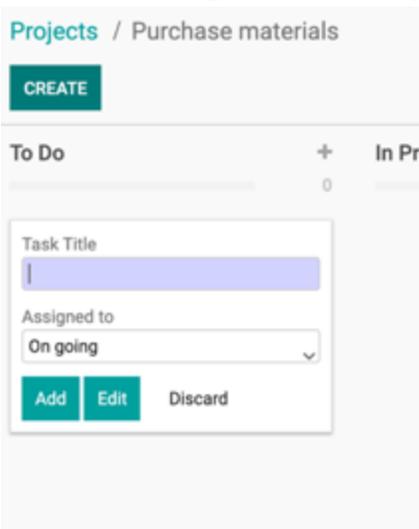


Change the project stage using the drag and drop method.

With the icons on the upper right hand side you can analyze your business opportunities from different angles such as listing, calendar, pivot, graph and activity view.

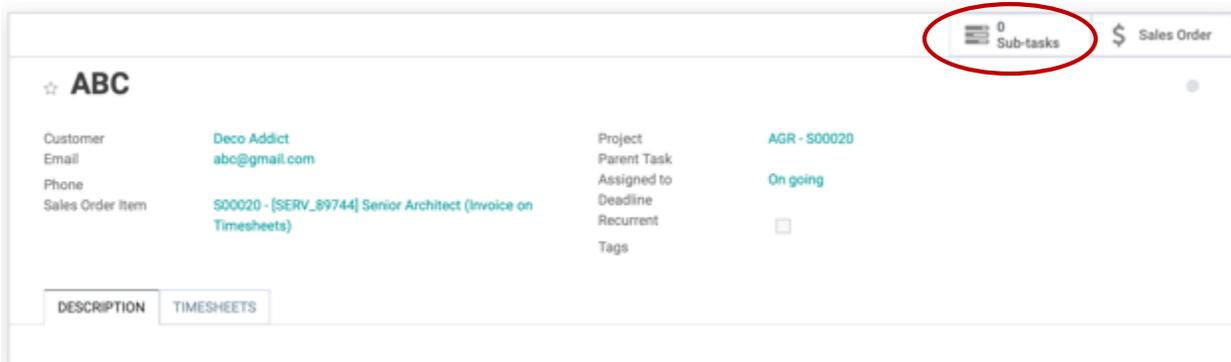
iii. Create project tasks

Enter the project you would like to create a task. Click on **Create**. Choose the responsible person for a task under **Assigned to**. Once created, add more details opening it and clicking on **Edit**. When a task is completed and ready to move to the next stage, use the drag and drop method to change to the corresponding status/stage.



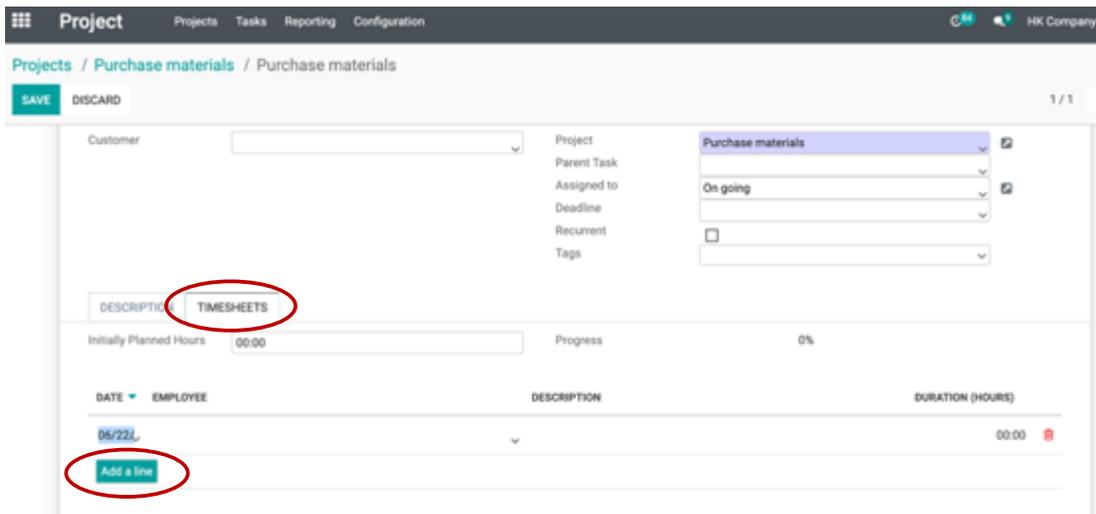
iv. Create project sub-tasks

Within a specific task, when you open it, you can also set different settings, as well as creating “Sub Tasks” which will be categorized under this as a parent task, making it easier for you to manage tasks under the same category.



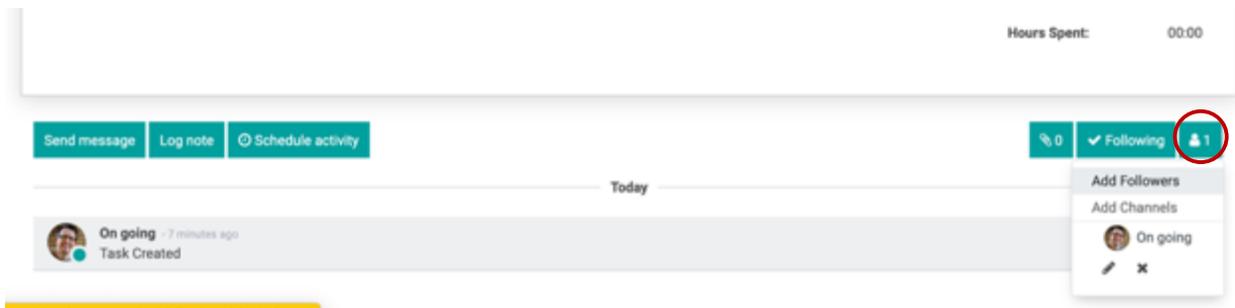
v. Manually enter timesheet for a task

Enter to the task you would like to record a timesheet, under the **Timesheet** tab, **Add a line** to specify the **Employee**, a simple **Description** of the task and the **Duration**. Then you will always be able to analyze and evaluate a project or individual tasks based on the planned time and actual spent time.



vi. Assign followers

Go the bottom right corner, and click on the figurehead that is besides the **Following** button. Select add followers to input the Recipients who should be notified of the status related to this project/task.



vii. Project settings

Click on the three dots on the top right corner of the Project, and you can adjust the different settings, such as:

- **Project manager:** Person in charge of managing the project.
- **Customer:** If it's an external project, can select the name of the customer.
- **Analytic account:** analytic account to which this project is linked for financial management. Use an analytic account to record cost and revenue on your project.
- **Visibility:** Defines the visibility of the tasks of the project.
 - Invited internal users: employees may only see the followed project and tasks.
 - All internal users: employees may see all project and tasks.
 - Invited portal and all internal users: employees may see everything. Portal users may see project and tasks followed by them or by someone of their company.
- **Timesheets:** to enable timesheet for the project.
- **Billable:** to invoice your time and material to customers.
- **Sub-tasks:** to split your tasks into subtasks.
- **Recurring tasks:** to auto-generate tasks for regular activities.

0 Documents 1 Tasks

Purchase materials

Name of the tasks: EN

DESCRIPTION

SETTINGS

Project Manager

Customer

Phone

Email

Analytic Account

Visibility

Allowed Portal Users

Company

Timesheets
Log time on tasks

Billable
Invoice your time and material to customers

Sub-tasks
Split your tasks to organize your work into sub-milestones
Sub-task Project

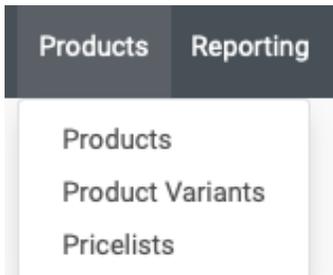
Recurring Tasks
Auto-generate tasks for regular activities

0 Following 1

viii. Trigger an automated project follow up upon confirmed Sales Order.

1. Create your company service style product.

If you have a Sales module, you can go into the module and create your own company service for sell by clicking the **upper menu bar** → **Products** → **Products**.



2. Service setup.

From the profile page once you've selected the button of **Create**. Input the service details (e.g. Name, price, unit of measure) of the service that you would like to have an automation of project trigger by confirming a sales order from the system.

*For the **Product Type**, you should select it as "Service".

Product Name: Installation service EN

Can be Sold
 Can be Purchased
 Can be Expensed

GENERAL INFORMATION | **VARIANTS** | SALES | POINT OF SALE | PRODUCT TABS | ECOMMERCE | DOCUMENTS | ACCOUNTING

Product Type: **Service**
 Product Category: All
 Internal Reference:
 Barcode:
 Sales Price: 1.00 \$ → Extra Prices
 Customer Taxes
 Cost: 0.00 \$
 Company:
 Unit of Measure: Units
 Purchase Unit of Measure: Units

Internal Notes

This note is only for internal purposes. EN

3. Define your service pricing.

You can define the way to charge your customer whenever they've selected your service with the following ways in **Service Invoicing Policy** from the **SALES** tab:

- **Order quantities:** Invoice the customer from the service quantity selected / requested of the confirmed Sales Order line.
- **Timesheets on task:** Invoice the customer by the actual time spent on their project, the time will be referred to the project team has marked from the project timesheets. Invoice create when the project has completed.

GENERAL INFORMATION | VARIANTS | **SALES** | POINT OF SALE | PRODUCT TABS | ECOMMERCE | DOCUMENTS | ACCOUNTING

Invoicing

Service Invoicing Policy

Service Tracking

Project Template

Ordered quantities
 Timesheets on tasks
 Milestones (manually set quantities on order)
 Don't create task
 Create a task in an existing project
 Create a task in sales order's project
 Create a new project but no task

Events

Is an Event Ticket

4. Trigger new project or tasks by confirming new sales order.

In the field of “**Service Tracking**”, you may request the system to trigger new project or new tasks for this confirmed service on new sales orders, it will appear as an automation and integrated with your Sales module.

GENERAL INFORMATION | VARIANTS | **SALES** | POINT OF SALE | PRODUCT TABS | ECOMMERCE | DOCUMENTS | ACCOUNTING

Invoicing

Service Invoicing Policy

Service Tracking

Project Template

Ordered quantities
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 Create a new project but no task

Events

Is an Event Ticket

You may select the scenario you want for the automation trigger:

- **Don't create task** (no automation will be formed)
- **Create a task in an existing project:** A new task will be formed and direct into your selected project file every time you confirmed this service, this action is to centralize all related project tasks in a place for specific team to follow up.
- **Create a task in sales order's project:** A new task and new project file will be formed whenever you confirmed a new sales order with this service. This project file will be formed and named as your Sales Order number for recognition. This action is to separate your projects individually by Sales Order.
- **Create a new project but no task:** A new project will be created whenever you confirmed a new sales order with this service and formed by the project template you've selected.

*You may also make use on the project you've created previous as your project template to follow and use in this selection, by clicking "**Project template**" to select the one you want to use. (You can refer back into section **i. to iv.** to see how a new project can be created.)

Once everything is set, you may click **Save** and try to sell your service by using Sales module to create new sales order.