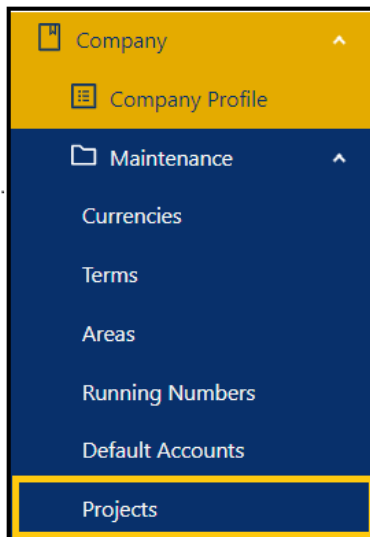# How to Add, Edit, and Delete Project

Overview:

The **Project Module** is an Add-On Module that is used mainly to categorize your transactions and able to generate Financial Reports for each category. This categorization may pertain as your Project, Branch, Location, Department and the likes.
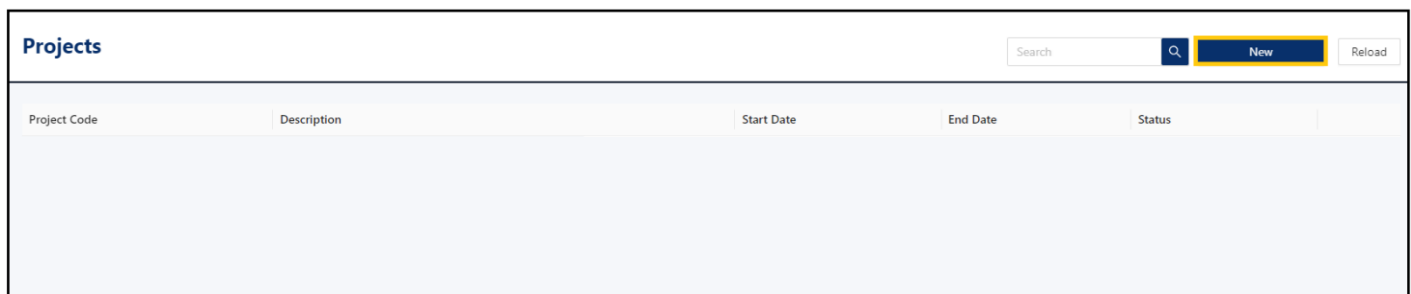
Procedure:

In **Navigation pane**, go to **Company** > **Maintenance** > **Projects**
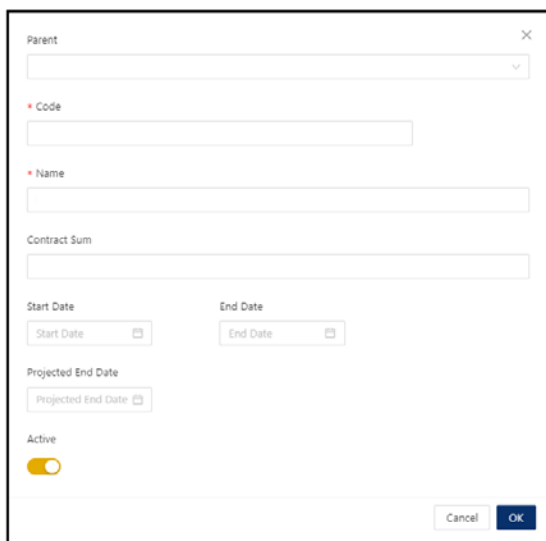

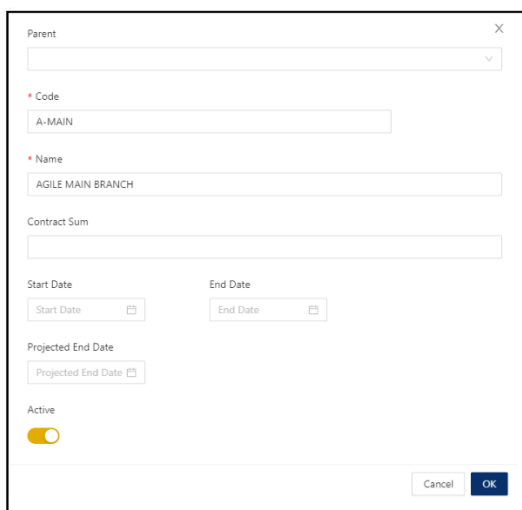How to Add New Project

1. Click **New** to add a project.

2. In *New form*, fill in all the necessary fields

- **Parent** – The mother project of created sub-projects, this is optional.
- **Code** – This is a compulsory field and should be a unique code.
- **Name** – Name of the project, this is a compulsory field.
- **Contract Sum** – The total allotted cost for the project.
- **Start Date** – The date the project actually started; this is optional.
- **End Date** – The date the project actually ended; this is optional.
- **Projected End Date** – The targeted date for the project completion, this is optional.
- **Active button** – The button to specify an active or inactive project.

3. Once done, click *OK.*

How to Add New Sub-Project

1. On the Project list view, click the **triple dot […] on** the Main Project

2. New form will open with the *default Parent Account*

Note: *Only Sub-Projects can be selected in transaction while both Main and Sub Projects can be used in filtering when generating Project Related Reports.*

How to Edit Project

1. To *Edit*, click the **three-dot button** > *Edit*

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2. Apply necessary changes. Once done, click *OK*.

How to Delete Project

1. To **delete**, click the **three-dot [...] button** > *Delete*

2. A *pop-up* will appear, click *Delete*.

Application:

The Project is now available for selection in transaction forms.

Global - Applies to the entire document.

Per Item – will apply for a specific item

For further concerns regarding this matter, please contact support to assist you or create ticket thru this link https://support.qne.com.ph