



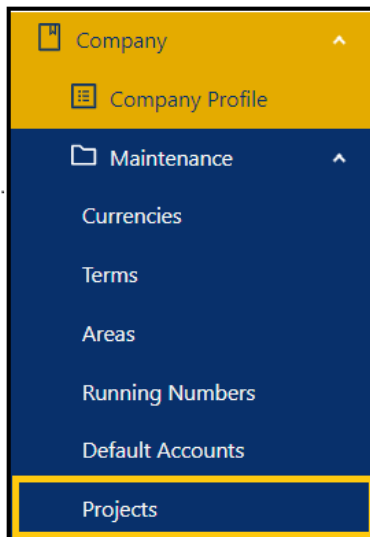
## How to Add, Edit, and Delete Project

### 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.

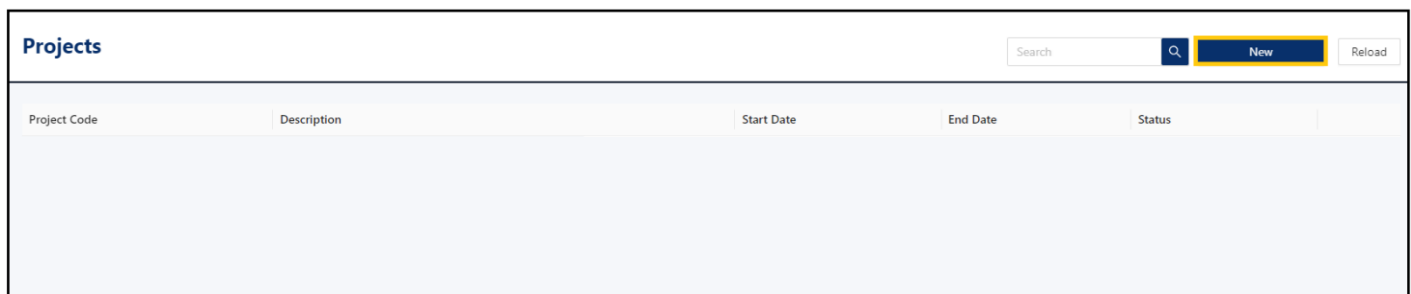
### Procedure:

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



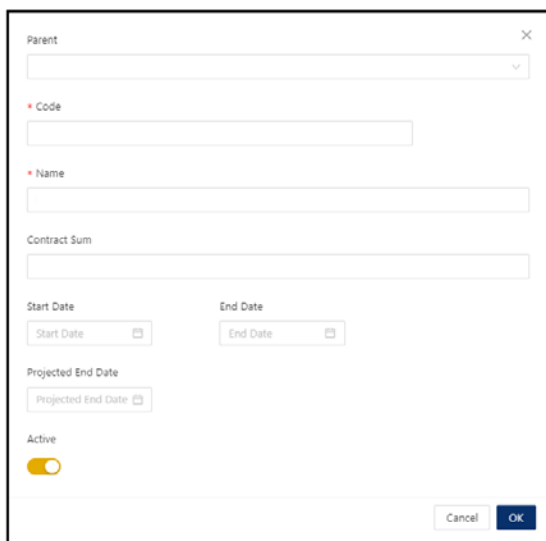
### How to Add New Project

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

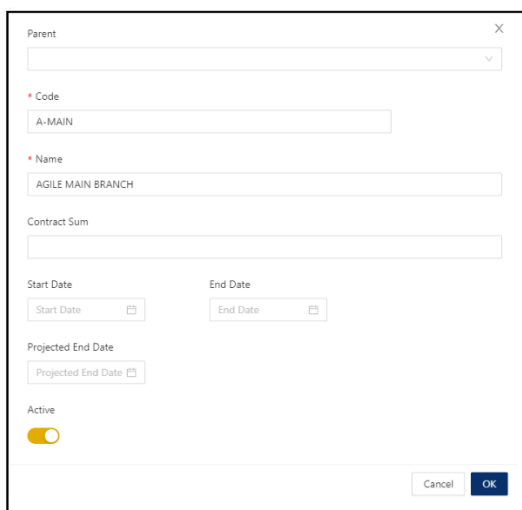


2. In **New form**, fill in all the necessary fields

- **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

Project Code	Description	Start Date	End Date	Status	
A-MAIN	AGILE MAIN BRANCH			Active	...
B-MAIN	BLISS MAIN BRANCH			Active	
C-MAIN	CARMILLA MAIN BRANCH			Active	

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**

Project Code	Description	Start Date	End Date	Status	
A-MAIN	AGILE MAIN BRANCH			Active	...
B-MAIN	BLISS MAIN BRANCH			Active	
C-MAIN	CARMILLA MAIN BRANCH			Active	

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

## How to Delete Project

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

Project Code	Description	Start Date	End Date	Status	
A-MAIN	AGILE MAIN BRANCH			Active	...
B-MAIN	BLISS MAIN BRANCH			Active	...
C-MAIN	CARMILLA MAIN BRANCH			Active	...

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.

**Sales Invoices** Cancel Save Save & New INV2403/014

\* Customer: 101-A001 ADVANCE TRADING CORPORATION Billing Address: 35, WEST OF AYALA SE. JIL PUYAT, MAKATI CITY Attention: Ms De La Cruz \* Date: 03/19/2024

Currency Rate: PHP 1.000000 \* Term: 30 DAYS Agent: CINDY Our DO #: Ref No.:

Description: SALES Project: A-B1 Delivery Term: Tax Inclusive: Deferred VAT:

Details Notes DO Address Others

#	Stock	Description	F. Desc	Qty	UOM	Unit Price	Amount	Discount	Project	Tax	W/Tax
1	AMD-XP/1800	AMD XP 1800		1.000000	UNITS	6,850.00	6,850.00		A-B1	SR-SP	
2	ASUS-EX	ASUS TECH EX MOTHERBOARD		1.000000	UNITS	2,800.00	2,800.00		A-B1	SR-SP	

**Per Item** – will apply for a specific item

**Sales Invoices** Cancel Save Save & New INV2403/014

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2	ASUS-EX	ASUS TECH EX MOTHERBOARD		1.000000	UNITS	2,800.00	2,800.00		A-B2	SR-SP	



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