

# 3.1.1. Projects

To access the list of projects, select **Project Costing** (the left panel) **Master Data Projects**.

The screenshot shows a software interface with a yellow sidebar menu on the left and a white main content area on the right. The sidebar menu includes the following items: Quick menu, CRM, Sales, Purchasing, Warehouse, Production, Money, **Project Costing** (highlighted with a red box), HR & Payroll, Asset Management, Accounting, Taxes, Analysis, Process Management, Administration, and Telegram. The main content area is organized into sections: Reports of Project Costing (Revenue Recognition), Project Costing Documents (Project Estimates, Project Costs Allocations, **Phased Revenue Recognitions** (highlighted with a red box), Project Budgets, Project Cash Flow Plan, Project Statements of Account), Project Management Documents (Project Damages/Losses Report, Project Item Pricing, Time Cards, Project Progress Reports, Request for Information (RFI), Requisitions, Resource Planning Documents, Project Scheduling), Equipment Management (Equipment Management, Resource Calendar), and Master Data (**Projects** (highlighted with a red box), Project Roles, Project Types, Project Tasks, Comment Only Estimation Row Reasons, Project Schedules, Project Tasks Statuses).

The project master data contains information about the company's external and internal projects.

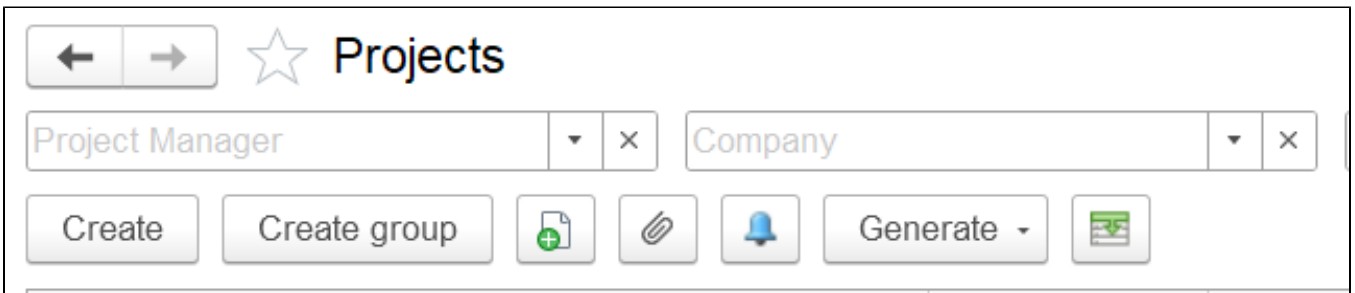
Before starting project creation, it may be necessary to create master records of the following types: [3.1.2. Project Types](#) and [3.1.3. Project Roles](#). However, all required master records of these and other types can also be created easily during the project creation process.

Description	Code	Status	Entity	Customer	Project Manager	Estimates	Budget	Cash Flow
Project Templates	00-00000002							
Al Hamra Falcon Island - Al Hamra homes, Ra...	BLD00000003	Active	MRB Engineer...	XYZ Contracting	Nellai	MEPE23-00000006	MEPE23-00000007	< n/a
CONCRETE WORKS (Milestone Invoicing)	BLD00000002	New	MRB Engineer...	moon link llc		MEPE23-00000002	< n/a >	< n/a
DAMAC Towers by Paramount Hotels & Resort...	IFD00000003	Active	MRB Engineer...	Damac	Nick	MEPE23-00000004	MEPE23-00000005	< n/a
JBT Test	MEP00000003	New	MRB Engineer...	Osama Syed		MEPE22-00000017	< n/a >	< n/a
K4 New contracting	MEP00000002	New	MRB Engineer...	Smart Choice	Danish	< n/a >	< n/a >	< n/a
KPK International - Warehouse Umm Suqeim	MEP00000001	Active	MRB Engineer...	KPK Internatio...	Pavel	ME0021-00000025	MEPE23-00000003	< n/a
moon link #1231	BLD00000001	Active	MRB Engineer...	moon link llc	Yusuf	MEPE22-00000019	MEPE22-00000023	< n/a
New project 123	IFD00000002	New	MRB Engineer...	Smart Choice		MEPE23-00000001	< n/a >	< n/a
Villa #115 - Al Hamra Village RAK	IFD00000001	Active	MRB Engineer...	Osama Syed		MEPE22-00000015	MEPE22-00000022	< n/a

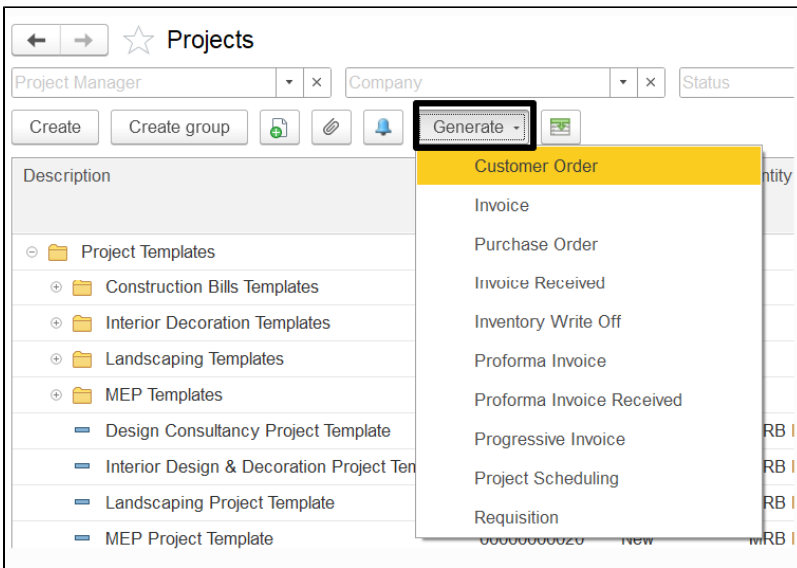
Project records can be organized in a folder (or group) structure. For example, projects can be grouped by customer, project type, or in any other logical way. No projects or folders are available by default in a newly implemented system.

The project list displays all projects in the system, organized in this hierarchical structure. If a specific project is not visible, try opening a different folder or using the **Search** field to locate the project by part of its description or the customer's name.

### The Toolbar Buttons

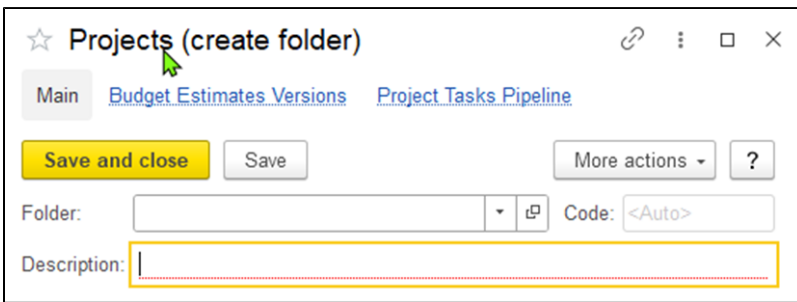


- To add a project, click the **Create** button on the toolbar. To edit an existing project, double-click the line containing its name. Alternatively, select the line, right-click it, and choose **Edit**, or use the toolbar option: **More actions Edit**.
- For a selected project in the list, the **Generate** button enables the creation of the following document types:
  - Customer Order** – Records the goods and services the customer requests for the project.
  - Invoice** – Bills the customer (client) for goods and services provided within the project.
  - Purchase Order** – Orders goods and services required for the project.
  - Invoice Received** – Registers the purchase of goods and services for the project.
  - Inventory Write-Off** – Records the issue of inventory items from a warehouse for project needs.
  - Requisition** – Requests goods and services required for the project.
  - Proforma Invoice / Payment Application** – Requests payment from the customer (client) for goods and services delivered.
  - Proforma Invoice Received** – Records a supplier's payment request for goods and services purchased for the project.
  - Progressive Invoice** – Bills the customer (client) based on project progress.
  - Requisition (for Estimate)** – Requests estimated prices of goods and services from the supplier.



### 3. Creating a folder

To add a group (folder), click the **Create Group** button on the form toolbar. This opens the **Projects (Create folder)** dialog box. In the **Description** field, enter the description of this group (folder).



To create a group within another group (a *parent group*), specify the parent group in the **Folder** field (see the figure below). This action adds a new level to the hierarchy. There is no limit to the number of hierarchy levels that can be created. After setting the parent group, click **Save and Close**.

Projects can be moved between folders either by using the drag-and-drop method or by selecting a different folder in the project card while editing the project.