

12.2 Projects

To create a new project, access the module and press the button

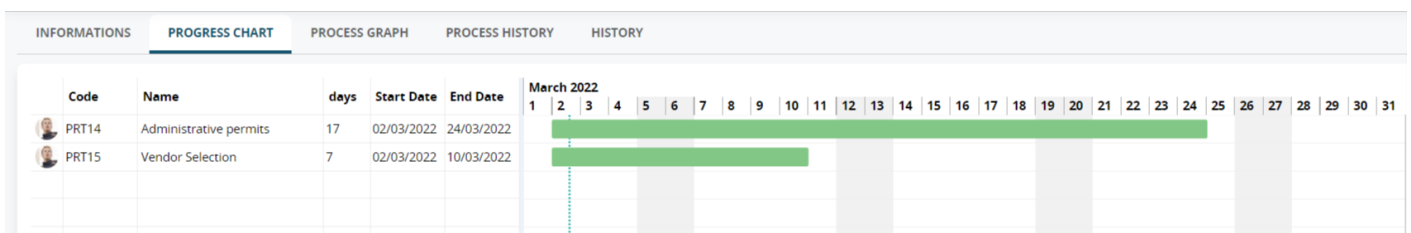
+ CREATE

The screenshot shows the vtenext web application interface. On the left is a dark blue sidebar with navigation icons and labels: Accounts, Contacts, Campaigns, Trouble Tickets, Potentials, Reports, Vendors, Purchase Order, **Projects** (highlighted), Modules, and Settings. Below these is a search bar and a 'Collapse' button. The main content area is titled 'Project vtenext Customisation Accounts module' and has tabs for INFORMATION, PROGRESS CHART, PROCESS GRAPH, PROCESS HISTORY, and HISTORY. The 'INFORMATION' tab is active, displaying 'Project Information' and 'Custom Information' sections. The 'Project Information' section includes fields for Project Name, Project No, Start Date, Target End Date, Status, In Progress, Related To, and Job Order. The 'Custom Information' section is currently empty. On the right side of the main area, there are 'SHORTCUTS' and 'RELATIONS' panels. The 'RELATIONS' panel shows counts for Project Tasks (10), Project Milestones (5), Documents (2), Activities (1), Trouble Tickets (1), Messages (1), and Processes (1).

Key fields:

Related to	Link to the customers' registry (Accounts/Contacts) present in vtenext, if the project relates to the customer. If it is an internal project, it can be left empty
Type	Customisable according to the types of projects in use in your company
Progress	Percentage value of project progress
Status	Important for knowing the state of progress of the project

In the "Progress Chart" tab you can view a Gantt chart of the project (see below, when we will link Project Tasks and Project Milestones).



Revision #1

Created 2 September 2024 07:59:06 by Admin

