



## ServiceLedger Getting Started Guides

### Getting Started with the Project Manager

The Project Manager allows you to easily create and track projects in ServiceLedger and consolidate multiple work orders from ServiceLedger under a single project. The purpose is to consolidate revenue and costing information from each work order up to the project level to allow you to perform project revenue and costing reporting.

*Note: ServiceLedger will be consolidating much of the functionality between Projects and Work Orders over the next couple of years to allow the Work Order to take over all of the existing functionality of Projects. Depending upon your needs you may want to consider Work Orders for tracking Projects since each work order can now be open perpetually with the ability for progress invoicing, task and task group management and project scheduling.*

#### **Basic Philosophy of Projects**

When creating projects, you would link the project to the account and then link all associated work orders to the project. Based upon the project setup, either the project or work orders would determine when the work would be invoiced. All revenue and costing information on each individual work order related to the project would roll-up to the project allowing you to view the revenue and costing for the project as a whole, as well as the ability to drill-down to the individual work orders to track the revenue and costing for each phase.

The Project Manager is not responsible for any “direct” scheduling. To schedule work on any project, you need to drill-down to the work order and schedule the work order.

When invoicing your projects, you can elect to have either the project handle all invoicing (a manual method) or have the work order handle all invoicing at the time of posting (an automated method).

If you invoice directly from the project, you will need to create the invoice and enter the invoice information as no information from the work order will carry over to the invoice. This method is generally recommended if you are doing progress or phase invoicing as a percentage of the overall project estimate, or you have a fixed estimate you cannot exceed.

If you invoice from the posting of the work orders, an invoice with all work order information will be automatically created at the time the work order is posted and linked to the project. This method is preferred; however it does not concern itself with any fixed estimates.

## Creating Projects

The Project Manager is a component of the Service Manager and to launch the **Project List** you can click on **Service | Projects** from the file menu or clicking on **Service | Projects** from the navigator. Click on the **Add New Record** button to add a new project.

The screenshot shows a software window titled "Project 8" with a status of "Not Started". The interface includes a toolbar with options like "Save & Close", "Save", "Print", and "Complete Project". Below the toolbar, there are dropdown menus for "Account", "Location", and "Manager". A "Summary" text area is also present. A tabbed interface at the bottom includes "Main", "Summary", "Plan", "Change", "Invoices", "Costing", "Schedules", and "Quotes". The "Main" tab is active, showing "Project Details" (Invoice Type: Work Order Only Invoicing, Type: General, Priority: Medium) and "Scheduling Details" (Expected Start Date: 11/23/2011, Target Completion Date: 11/30/2011, Expected Completion Date: empty). An "Add Time Stamp" button is located below the details sections.

1. Select an **Account** for the project pulled from your account list.
2. Select the **Location** for the project pulled from your account's location list.
3. Select the **Type** of project (this is optional and primarily used for reporting purposes only)
4. Select the **Priority** of the project.
5. Enter a Project **Manager**.
6. Enter a Project **Summary**.
7. Enter an **Expected Start Date**.

8. Enter a **Target Completion Date**.
9. Click **Save** to save the project information.

### Creating Project Plans

Project Plans allow you to define the different phases and tasks of each project and automatically create work orders for each phase and task with a click of a button. *Note: The Phases and Tasks on Projects is not the same as the Task Manager on Work Orders. If you are going to use Projects you will have to create a separate list of Phases and Tasks for Projects.*