

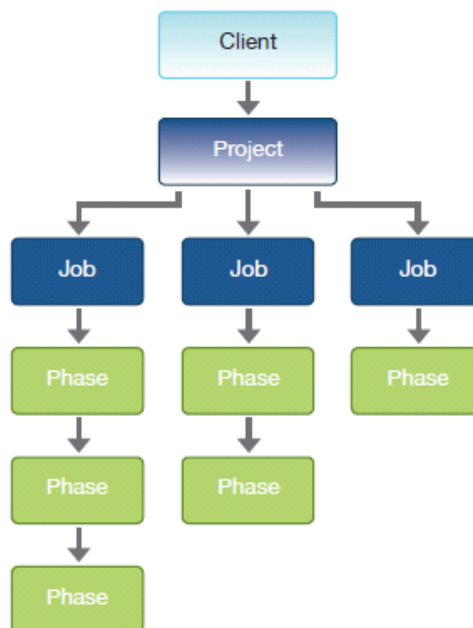


Synergist Spotlight on.....

Projects

A Synergist Project is a group of jobs. If you have a selection of jobs, that need to be linked for reporting or invoicing purposes, it is possible to group them under a **Project** within Synergist.

Project Structure



Grouping a job within a Project

In order to be able to group a job within a **Project**, the project needs to be in existence. If the project has not yet been set up, it is possible to do this at the same time as setting up the job / opportunity.

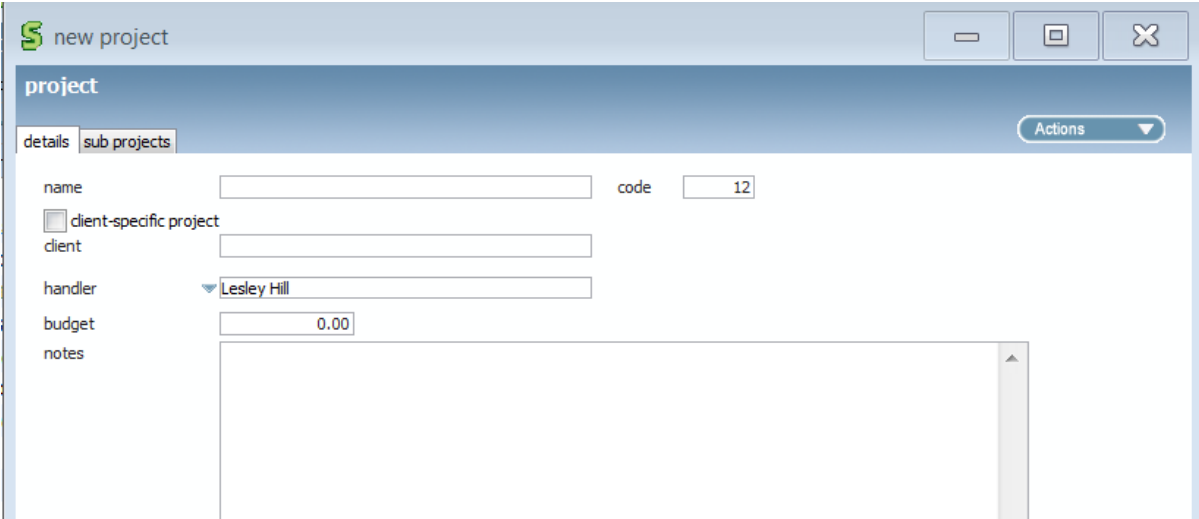
Creating a Project

New Projects can be created from within "**Projects**" shown in the menu bar at the left of the screen. Once you have selected "**Projects**" from the menu bar you will be presented with a screen listing all the existing projects and the option to create New Projects.

name	client
1891	yahoo
Change request	Links
Electric	America Works
GG 10375	Novartis



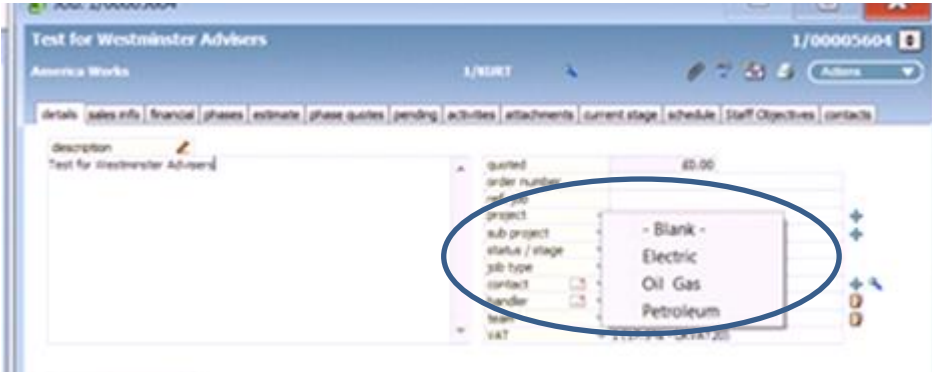
Click on the blue plus symbol  to access the details screen for the Project.



Projects can be client-specific therefore only available to the related client.

Grouping a job within a project, when the project already exists

From the detail tab on the job, click on the drop down against project, then select the required project from the list.





Grouping a job within a Project, when the Project has not yet been set up

From the details tab on the job, click on the plus button to the right hand side of the project

↑	quoted	£0.00	
	order number		
	ref. job		
	project	▼	+
	sub project	▼	+

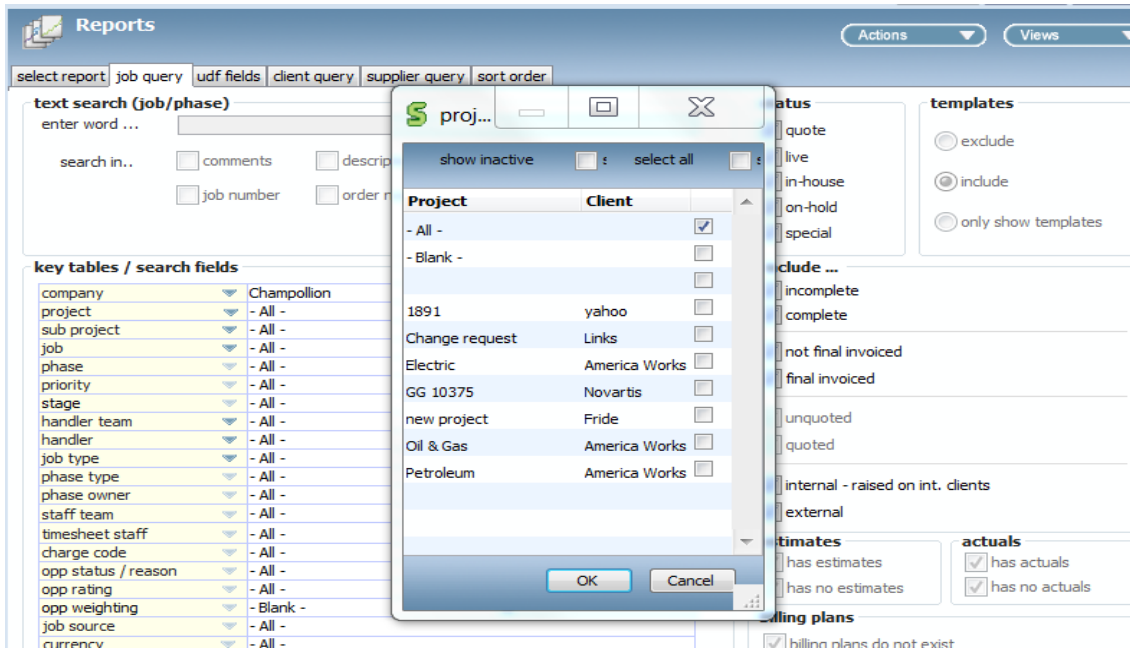
Fill out the project name, select the relevant client if it is specific to a particular client, enter a budget value if required and add any notes.

The screenshot shows a 'new project' window with the following fields and options:

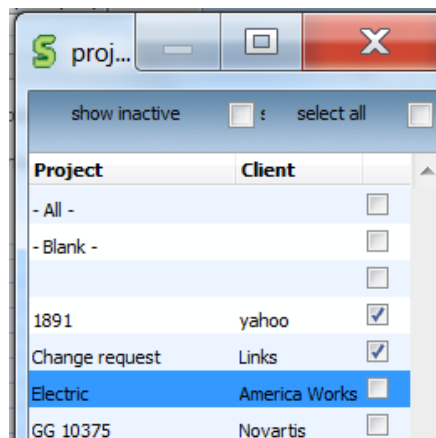
- name**: [text input]
- code**: [input with value 12]
- client-specific project**
- client**: [text input]
- handler**: [dropdown menu with 'Lesley Hill' selected]
- budget**: [input with value 0.00]
- notes**: [text area]

Navigation tabs at the top include 'details' and 'sub projects'. An 'Actions' dropdown menu is located in the top right corner.

Once a project has been linked to a group of jobs it becomes possible to report on these jobs as a project without having to select all of the individual jobs.



From the Job Query tab click on the blue triangle next to Project, a list of existing Projects will appear. To select a Project tick in the box to the right of the Project name.



You are able to print a report showing existing projects from within the projects list screen by clicking on the printer icon.



Reporting

10/04/13 4:38pm Project Report						
Project	A/h	Client	Budget	Notes	Inactive	
Spring launch campaign	LH	9/APP Apple Pty Limited	25000.00			
Summer Launch Campaign	LH	9/BLL Bovis Lend Lease	20000.00			
Visual change board - Rhodes office	RR	9/ALC Alcatel Lucent	0.00			
Winter re-branding	LH	9/BLL Bovis Lend Lease	50000.00			

You can also use the Projects report from within the general reports menu under the sub section “jobs and phases”. This report has additional criteria to show jobs associated with projects.

10/04/13 4:44pm Projects								
Project	A/h	Client	Budget	Total Costs	Total Charges	% Costs	% Charge	
Visual change board - Rhodes offi	RR	9/ALC Alcatel Lucent	0.00	0.00	0.00	0%	0%	
		Job Number	description	Costs	Charges			
		9/00900021	visual change boards for internal communications for thi	0.00	0.00			

Other Project functionality:

- Invoicing multiple jobs within a Project
- Project level Quote
- View of all Billing plans within a Project
- Project filter supported in standard reporting and Data viewer