

Overview of Projects

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This guide provides an overview of the Projects module. It is intended for general users.

A project in aACE is a tool used to group orders together based on specific clients. You can access the Projects module by navigating from the Main Menu > Order Management > Projects.

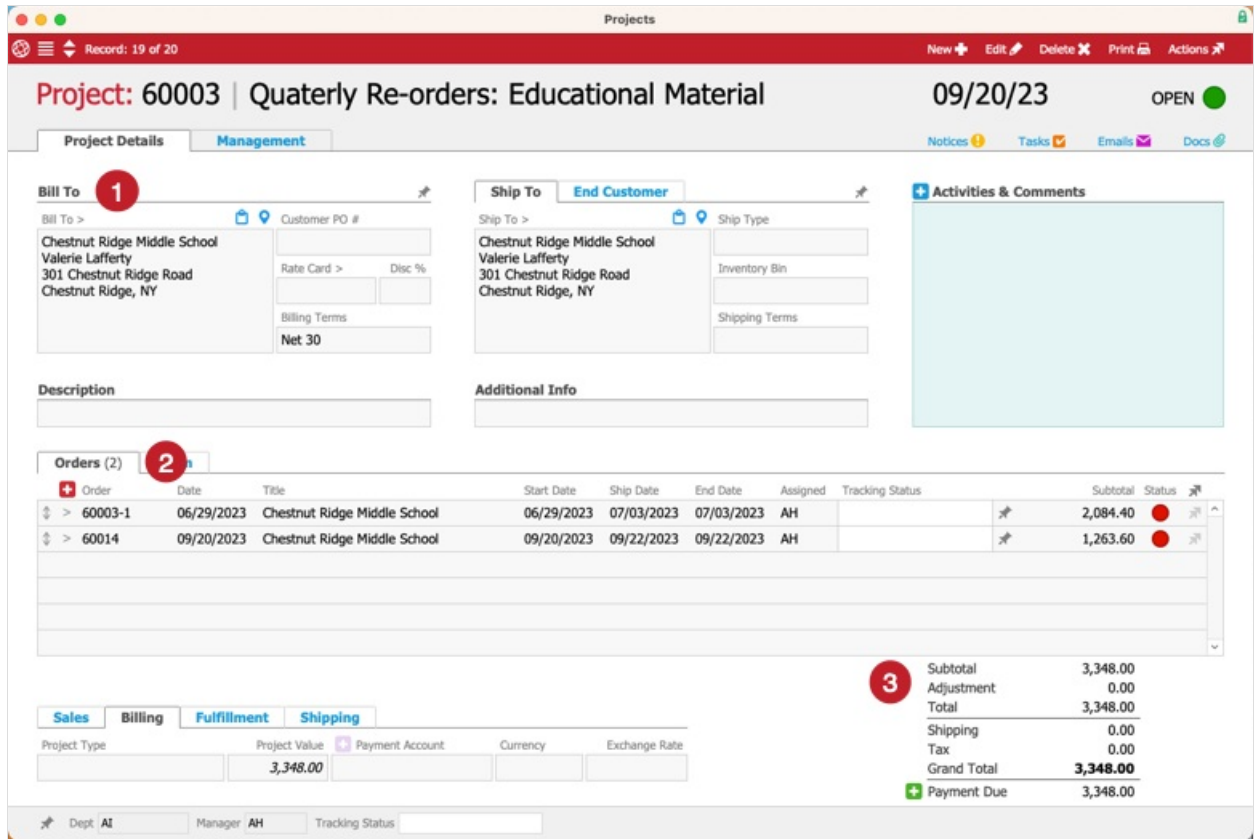
You can use projects for a variety of purposes, including:

- To represent an annual service contract or support agreement — For example, a software company can organize many orders pertaining to the same service contract for a client into a single project.
- To represent a contract for a specified number of products — For example, a magazine company can use projects to track magazine advertisers who each commit to a certain number of ads.
- To represent a retainer — For example, a service company can use projects to track the balance of work done for each client.

Your organization's unique workflows will determine the best use of the Projects module.



Project Details Tab

The Project Details tab provides customer information, orders within the project, and payment information. The layout looks similar to the [Sales / Production / Service Order tab](https://aace6.knowledgeowl.com/help/overview-of-orders#OrderTab) (<https://aace6.knowledgeowl.com/help/overview-of-orders#OrderTab>) of an order:




1. Bill To Section

The Bill To section displays customer information, including the primary contact, address, and billing terms. If the project is tied to a PO, rate card, or other discount, this section will also list that information.

To copy the customer's address, click the Clipboard icon (). To open a web browser and display the address in Google Maps, click the Location icon ().

2. Orders Section

aACE lists a project's related orders here. You can create additional orders linked to the project by clicking the Add icon ().

If a team member creates a record from the Leads or Orders module that should be linked to a project, team members with the needed privileges can connect the records:

- Connect a lead to a project — Navigate to the lead's detail view. Click Actions > Update Project.

Note: Any orders added to a lead *before* you connect the lead to the project will *not* be automatically linked to the project. You must manually update the project for those

orders.

- Connect an order to a project – Navigate to the order's detail view. Click *Admin Actions* > Update Project.

Note: You can also update the project for multiple orders: At the Orders list view, locate the needed orders, then click *Admin Actions* > Update Project in List.

3. Payment Section

This section gives an overview of the project's financial details. aACE tabulates payment details from each related order and provides a summary of the totals.

Management Tab

The Management tab provides more specific information about the orders linked to the project. Information for *all* orders in the project are included on the relevant tabs. These tabs are the same as the Management tab for an order. You can read more about these tabs in our guide [Overview of Orders](https://aace6.knowledgeowl.com/help/overview-of-orders) (<https://aace6.knowledgeowl.com/help/overview-of-orders>).
