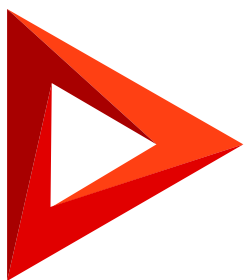


Projects

Create a project

Version 7.17



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Create a project

PRODUCTS: SALES CREATIO

For new Creatio instances this functionality is available for Creatio version 8.0.9 and earlier. Existing Creatio instances keep the Classic UI section after updating to Creatio version 8.0.10 and later.

A project is an activity intended to achieve specific results, for example, create a new product or develop a new service. Thus, a project can involve constructing a house, developing a software product, or implementing a new automated system in the company.

Use the [*Projects*] section to form a project structure, plan working time, allocate necessary resources, track deadlines, and keep a record of expenses.

This section has several pre-set [quick filters](#):

- By project start and end date (the [*Start*] and [*Worked till*] fields of the project page). The project will be displayed in the section if the dates in the filter fall to the project time period.
- By owner (the [*Owner*] field of the project page).

Add a new project

1. Go to the [*Projects*] section.
2. Click [*New*]. This will open a new page.
3. Fill out the general project information on the page that opens:

Name	The project name. Required.
Status	Project completion status. For example, "Planned," "In progress," or "Completed." By default, set to "Planned." Required.
Owner	Employee in charge of the project. By default, set to the name of the current user. Required.

4. Fill out the key project details on the [*General information*] tab:

Account	Account and/or contact that is the project customer. Filling out one of these fields is required.
Contact	
Start date	Planned start and end dates of the project.
Due date	
Type	Type of the project. For example, "Internal project" or "Complex project." Required.
Duration	Project task duration, in hours and minutes. The field is non-editable and is calculated automatically as a sum of working hours within the planned start and end dates of the project.
Deadline	Scheduled project completion date.

5. Specify connected opportunities and contractors in the [*Connected to*] detail:

Opportunity	The opportunity as part of which to perform the project.
Supplier	The company acting as a supplier in the project. Usually, this is your company.

6. Go to the [*Attachments and notes*] tab and add more information about the project, as well as attachments and links to the web resources related to the project.

7. Click [*Save*] in the top left corner.

Note. Click [*Copy*] in the section list to copy an existing project. This will also copy all tasks related to the project. The key dates of the project copy and its subordinate tasks will be offset using the current date as the start date. For example, if the project start date is 03/01/2020, the end date is 03/15/2020 and the project was copied on 03/10/2020, the start date of the project copy will be set to 03/10/2020, and the end date - to 03/25/2020.

Configure the project structure

Set up the list of tasks related to the project implementation on the [*Structure*] tab of the project page.

To add a new project task:

1. Go to the [*Structure*] tab of the project.
2. Click **+** on the [*Structure*] details and select [*Add root project task*].

To add a subordinate task to a root task, select the root task in the detail list, and select [*Add subordinate project task*] in the detail action menu.

3. Fill out the fields on the page that opens. Learn more in a separate article: [Manage project tasks](#).
4. Click [Save].

As a result, Creatio will add a new task to the project structure.

Select a task record and click [Up] or [Down] to **move the task in the task list**. You can move items of the same level only.

Note. The filter on the [Structure] detail applies only to root tasks. Subordinate tasks are not filtered.

Start a project and track its execution

The [Status] field is set to “Planned” for a new project record. To start a project, change the field value to “In progress.”

The [Completion %] field on the [General information] tab displays the actual percentage of project completion at the moment. Set this value manually or select the [Calculate automatically] checkbox. When the checkbox is selected, the field becomes non-editable, and its value is calculated as the percentage ratio of total actual working time and total estimated working time, based on the [\[List of resources \] detail](#).