



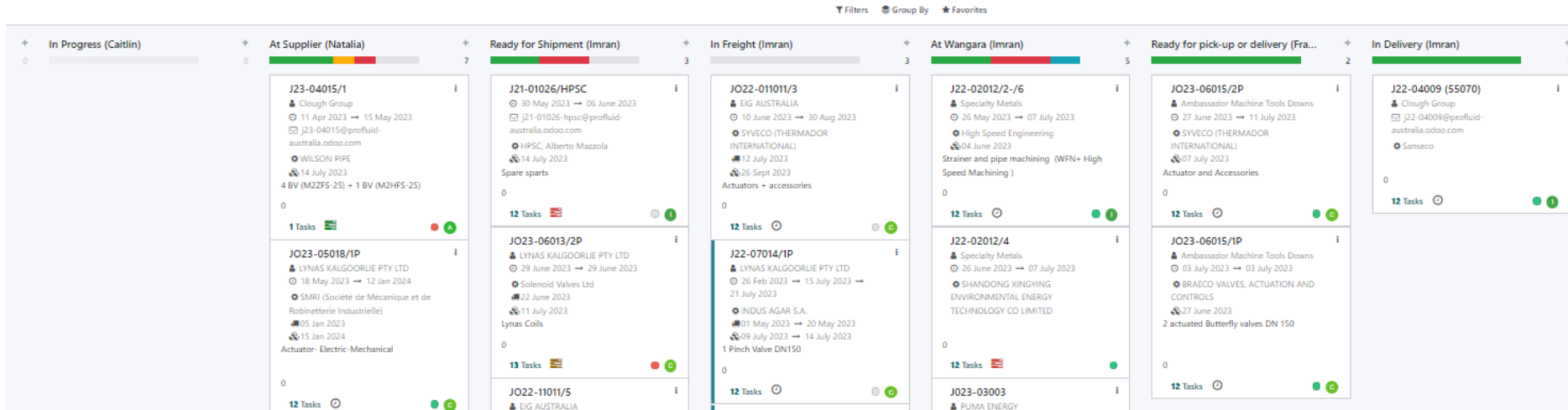
PROJECT

Dates Settings

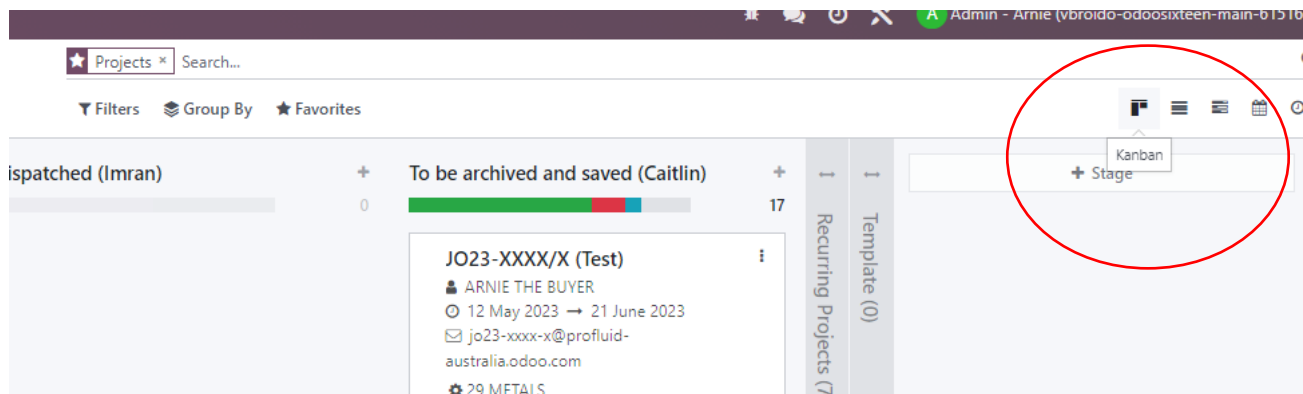


Being on the same page!

Below is the Kanban view in Project:

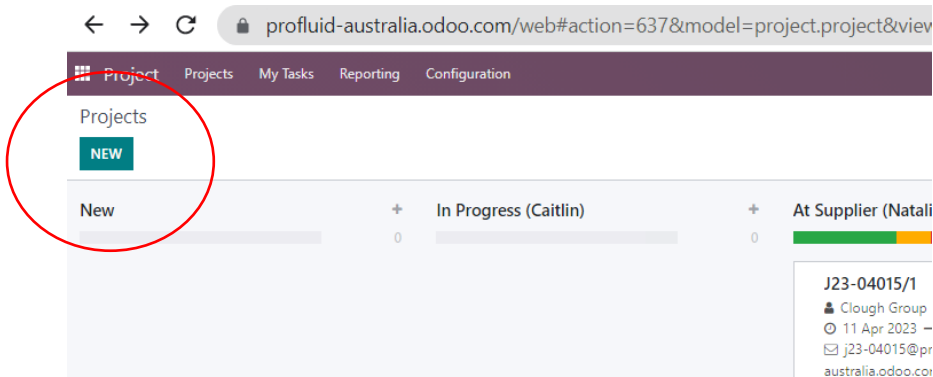


Remember: Kanban view can be selected from here:

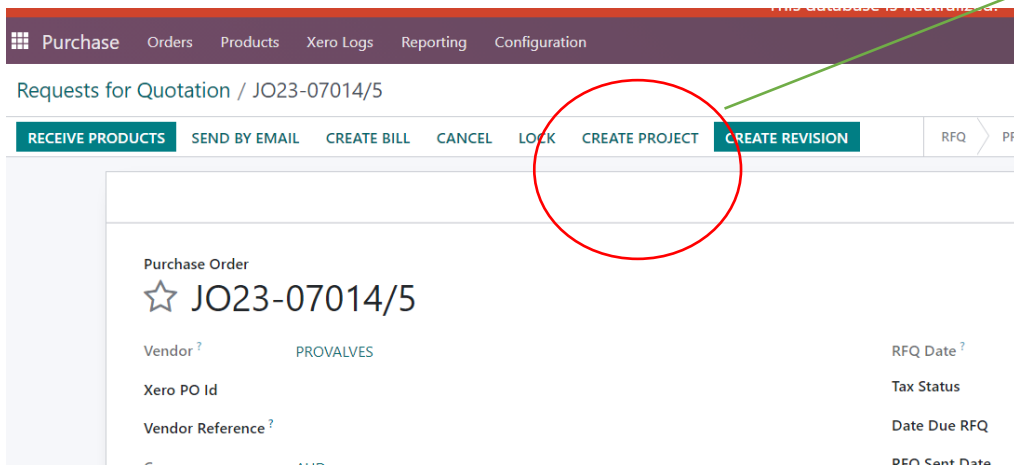


Remember projects are created from 2 ways:

1/ Manually in Project



2/Manually in Purchase:



The person in charge of the **purchase must decide if a project is required.**

Click in 'Create Project' will automatically create a Project in considering the references mentioned in Purchase and Sales. **At this stage, it is important to check the dates in Sales** ('Expected date of delivery') **and in Purchase** ('Expected date of pick-up").

Project 'label'

The screenshot shows a project card for 'J22-11017/1P'. The card contains the following information:

- Project ID:** J22-11017/1P
- Customer:** LYNAS KALGOORLIE PTY LTD
- Order Dates:** 21 Apr 2023 → 30 June 2023 → 21 July 2023
- Supplier:** INDUS AGAR S.A.
- Supplier Dates:** 01 May 2023 → 20 May 2023
- Material Dates:** 09 July 2023 → 14 July 2023
- Description:** 1 Pinch Valve DN50
- Quantity:** 0
- Tasks:** 12 Tasks

Callouts point to specific elements:

- Access to Project settings:** Points to the three-dot menu icon in the top right corner of the card.
- Customer's name mentioned in Sales Order:** Points to the customer name 'LYNAS KALGOORLIE PTY LTD'.
- Supplier's name mentioned in Purchase Order:** Points to the supplier name 'INDUS AGAR S.A.'.
- Quick description of the order (must be manually filled in in Project setting by the Coordination Department who is in charge to assign the project's tasks):** Points to the project description '1 Pinch Valve DN50'.

Dates



J22-11017/1P

LYNAS KALGOORLIE PTY LTD

21 Apr 2023 → 30 June 2023 →
21 July 2023

INDUS AGAR S.A.

01 May 2023 → 20 May 2023

09 July 2023 → 14 July 2023

1 Pinch Valve DN50

0

12 Tasks

'Planned dates'

- First date = date of customer PO (Odoo automation)
- Second date = expected date of delivery (Odoo automation)
- Third date: 'new date of delivery' (this date must be manually filled in in Sales or project sittings by the **Sales or Logistic department**. This date can be adjusted several times (in case of several delays in production and freight for example). At the same time the person who adds or changes the date should consider if the customer needs to be informed about the delay.

J22-11017/1P

LYNAS KALGOORLIE PTY LTD

21 Apr 2023 → 30 June 2023 →
21 July 2023

INDUS AGAR S.A.

01 May 2023 → 20 May 2023

09 July 2023 → 14 July 2023

1 Pinch Valve DN50

0

12 Tasks

'Pick-up dates'

- First date: 'Expected date of pickup at supplier' delivery (Odoo automation; date comes from Purchase Order)
- Second date: 'New pick-up date' (This date must be filed in Purchase by Sales department in case of production or manufacturing delay, or by **Logistic department** in case of shipment delay - At the same time the person who adds or changes the date should consider if the customer needs to be informed about the delay)

The screenshot displays a mobile application interface for a project. At the top, the project ID 'J22-11017/1P' is shown next to a three-dot menu icon. Below this, the customer name 'LYNAS KALGOORLIE PTY LTD' is listed. A timeline of dates is shown: '21 Apr 2023 → 30 June 2023 → 21 July 2023'. The supplier name 'INDUS AGAR S.A.' is listed with a gear icon. Further down, two more date ranges are shown: '01 May 2023 → 20 May 2023' and '09 July 2023 → 14 July 2023'. The item description '1 Pinch Valve DN50' is visible, followed by the number '0'. At the bottom left, there is a '12 Tasks' indicator with a clock icon. At the bottom right, there are two circular buttons, one grey and one green with a white 'C'.

'Date of arrival in Wangara'

- First date: 'Expected date of arrival in Wangara' (Odoo automation; date comes from Purchase Order – **Sales department** must fill in this date when confirming the PO)
- Second date: 'New date of arrival' (this date must be filed in Purchase by **Logistic department** in case of shipment delay - At the same time the person who adds or changes the date should consider if the customer need to be informed about the delay)

Project Setting view

All important dates can be followed from project settings:

☆ J22-07014/1P

Supplier? INDUS AGAR S.A.

Name of the tasks? Tasks

Customer? LYNAS KALGOORLIE PTY LTD

Tags?

Is Template?

Set Status

1 Purchases

1 Sales

12 Tasks

Project Manager? Caitlin Filmlter

Planned Date 26 Feb 2023 → 15 July 2023

PURCHASE

Expected Date of Pickup at Supplier? 01 May 2023

New Pickup Date? 20 May 2023

Expected date of arrival in Wangara? 09 July 2023

New date of arrival? 14 July 2023

SALE

Expected date of delivery? 17 July 2023

New date of delivery? 21 July 2023

Description Settings

1 Pinch Valve DN150

