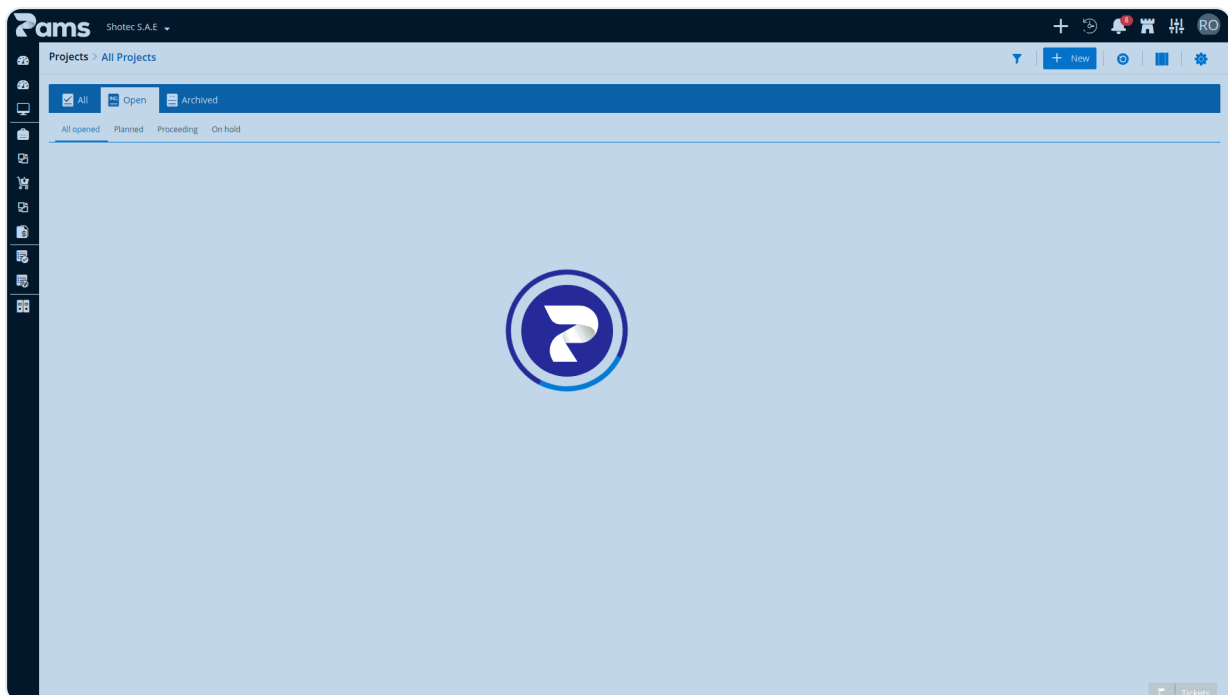


Projects

August 18, 2026

Projects

User Guide › Data › Project



Projects — Data › Projects

Overview

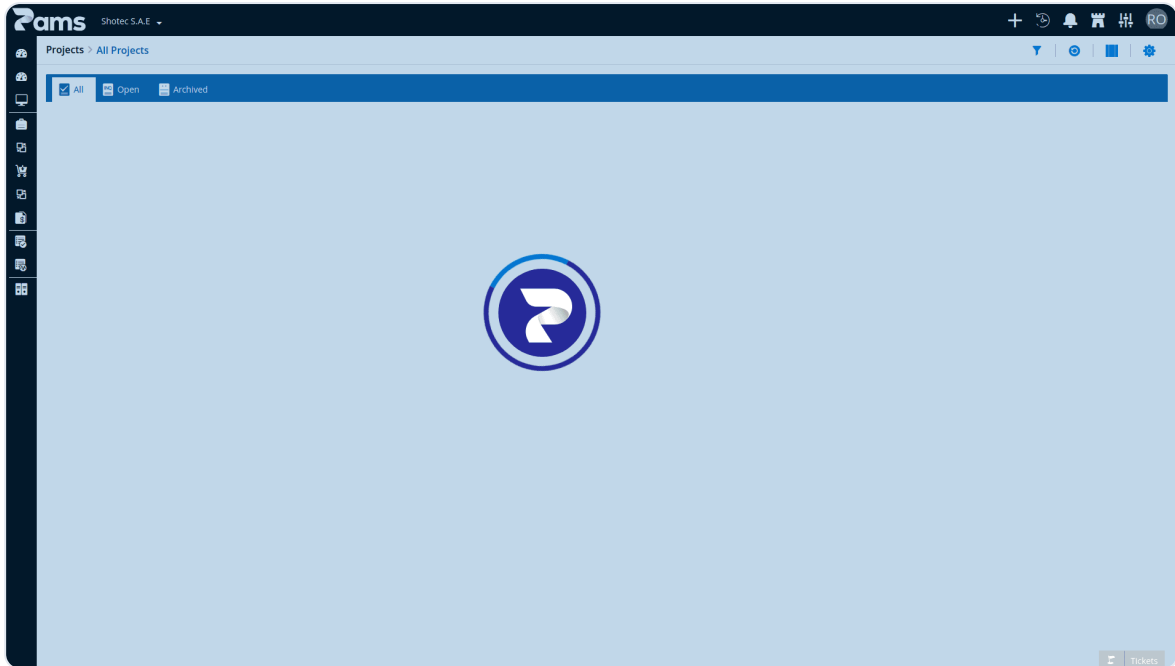
Use the Projects page to review Projects in the Data area and to work with Projects by stage. Sales representatives, Sales managers, Project managers, Purchasing officers, Warehouse managers, and Finance officers can use this page when they need to locate Project records or focus on Projects that are planned.

Before you start

You must have access to the **Data** navigation area and the **Projects** page.

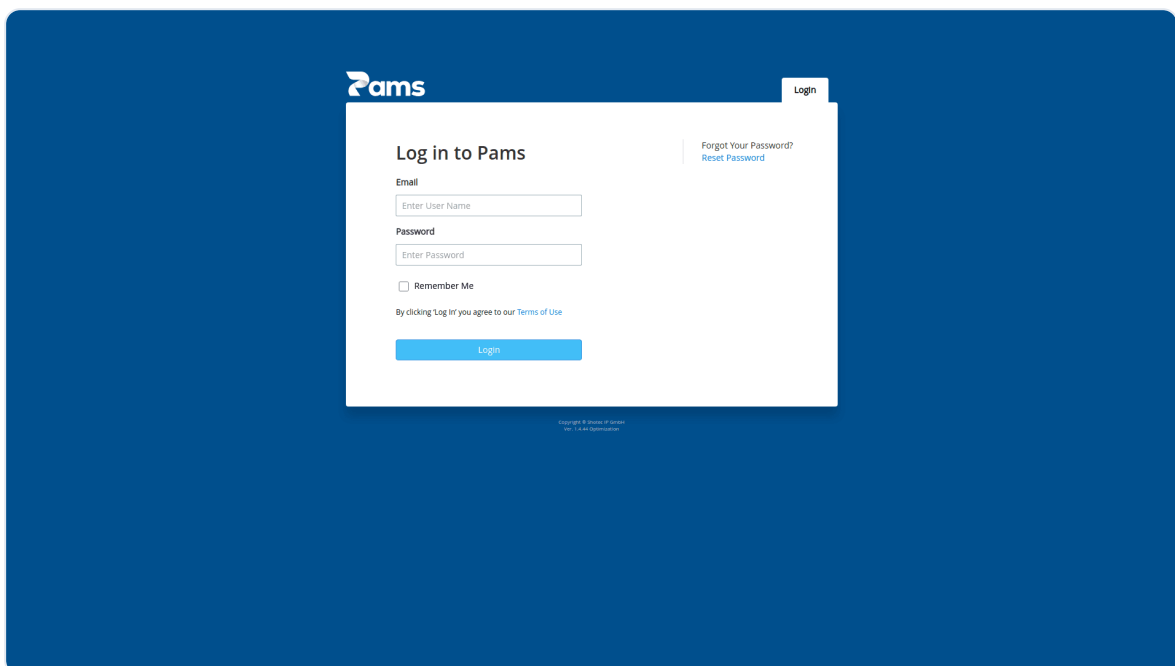
Steps

1. In the navigation bar, select **Data**, and then select **Projects**.



Projects — Data > Projects

2. Select **all** to review the complete Projects view.
3. Select **planned** when you need to review Projects in the planned stage.



Projects — Data > Projects

4. To begin a new Project, select **New**.

all

The **all** tab is the general Projects view. Use it to review Project records across the available stages and to locate the Project that you need to work with.

planned

The **planned** tab contains Projects in the planned stage. Use this tab when you need to focus on Projects that are planned rather than reviewing the broader Projects view.

Tips & cautions

Tip: Select **all** when you need a broad review of Projects, then select **planned** to focus on planned Projects.

Note: Select **New** only when you need to begin a new Project record.

Troubleshooting

- The Projects page is not visible → You may not be in the Data area → Select **Data**, then select **Projects**.
- Planned Projects are not displayed → The **all** view may be selected → Select **planned**.

Result

You have opened the Projects page and selected the Projects view appropriate to your work.

Related pages

- [Data — Overview](#)
- [Reference list](#)
- [Data — Learning Path](#)
- [VL registrations](#)
- [Configure Accounts](#)

- [Configure Contacts](#)
- **Apply Deductions
- Close Fully Paid Invoice**