

Getting Started with Projects Management

August 17, 2026

Getting Started with Projects Management

User Guide › Projects Management



Projects-Management record

Projects Management is the workspace for viewing and working with project records throughout their lifecycle. It is primarily used by Project managers, with supporting information relevant to Sales representatives, Purchasing officers, Warehouse managers, and Finance officers.

Your first session

Start by opening a project record and reviewing the information already recorded for the project.

1. Open **Projects Management**.
2. Open the project record you need to review.

3. Review the project information shown in the record.

What success looks like

The selected project record opens and displays its current project information.

Next steps

Continue in the relevant project record, or see the **Projects Management Overview** for an introduction to the area.

Related pages

- [Projects Management — Overview](#)
- [Projects Management](#)
- [Projects Management — Learning Path](#)
- [Projects Management](#)
- [Buyout to Po](#)
- [List](#)
- [Project Orders List](#)
- [orders](#)
- [delivered orders](#)
- [New Direct Order](#)
- [New Instant Job](#)
- [Production Order](#)
- [Shipping Order](#)