

Projects — Overview

September 12, 2026

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Overview

The Projects area provides a central workspace for managing project records throughout their operational lifecycle. It supports the visibility needed to coordinate project-related sales, procurement, warehouse activity, payments, and financial control.

Project managers use this area to maintain project information and review active or historical projects. Sales representatives, purchasing officers, warehouse managers, and finance officers can use project records to work with the projects relevant to their responsibilities.

Project records are organised into active and archived views, helping users separate current work from completed or inactive project information.

What you can do here

- Select **New** to create a project record.
- Select **All** to view all project records.
- Select **Open** to view open projects.
- Select **Archived** to view archived projects.
- Use the **Search box** to find a project record.
- Select **edit** to update a project record.

Related pages

- [Project List](#)

- [Projects — Learning Path](#)