Project Management

Overview

With Backstage you can group lightboxes, downloads, and financial documents into organized projects. Each project can contain multiple sub-projects, each with its own status. At the same time, the system maintains an overall status for the entire project. For example, a “Van Gogh exhibition” project may include sub-projects such as a catalog, a magazine, or a poster. This structure enables clear reporting, such as total project cost summaries.

The **Project Managemen**t module allows you to create new projects and manage existing ones.

You can create projects directly from the customer master data.

> **Note**
>
> **This module is available upon request.**
> Contact us at support@picturemaxx.com to learn how it can support your use case and to discuss activation options.

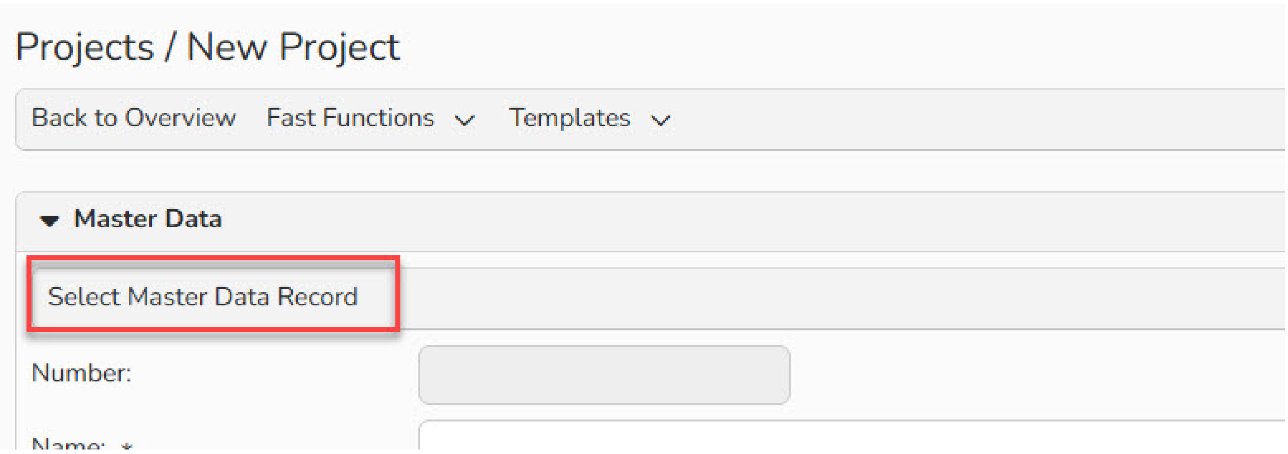
Create a new project

Follow the steps below to create a new project, directly from a customer master data or from the **Project Management** module.

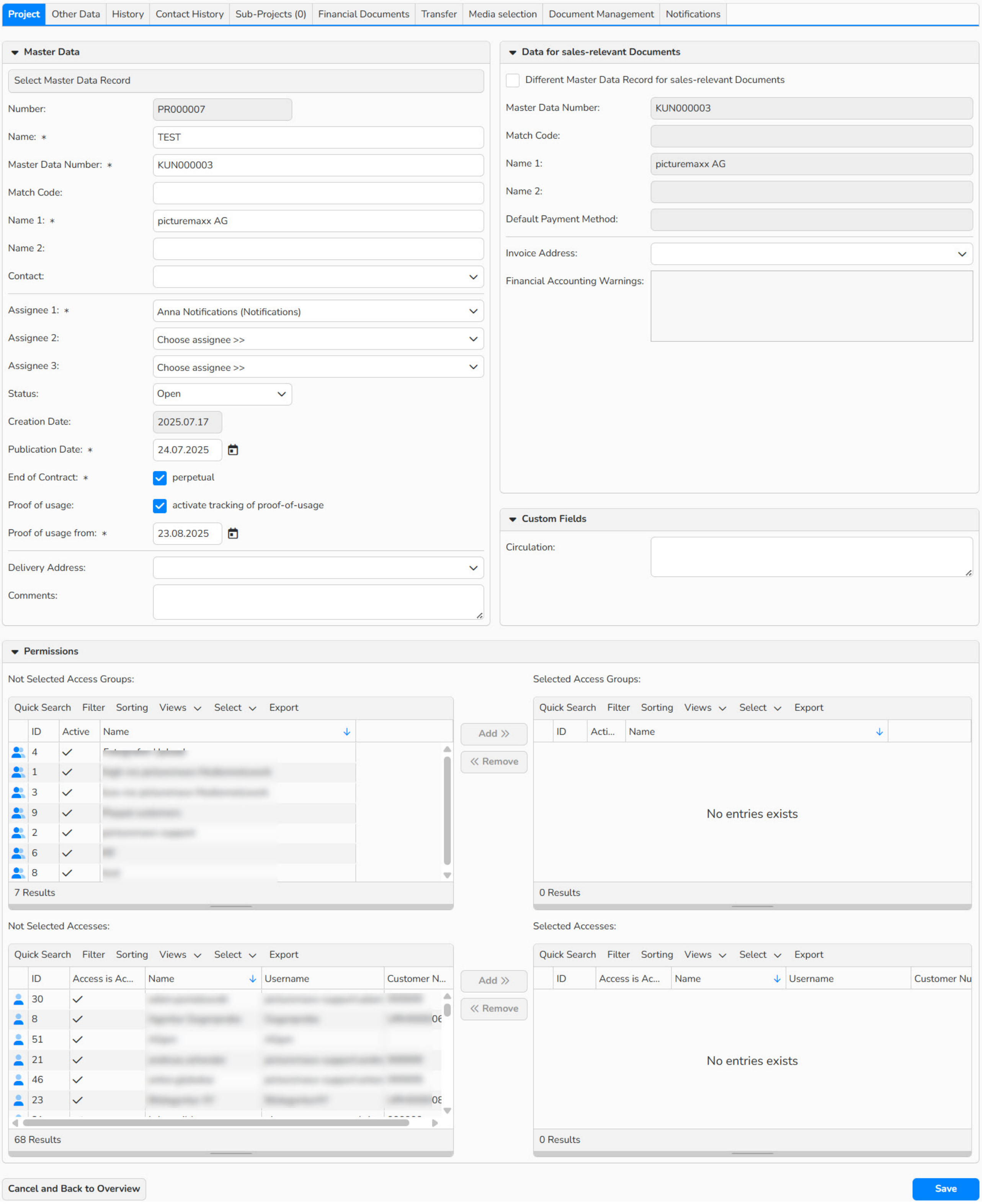
1. Open the **New Project** setup window from one of the following locations:
   - **Sales > Customers > Customers,** open a customer record, switch to the **Project** tab, and click **Create new Project**, or
   - **Project Management > Projects** and select **Edit > New.**
2. In the **New Project** window, assign the customer to the project:
   - If you started from the customer record, the customer is already preselected.
   - If you started from **Project Management > Projects,** click **Select Master Data Record.** In the **Customer Overview** dialog:
     - Select an existing customer from the list and click **Choose**, or

        - Switch to the **Create New** tab to enter new customer details.

3. Enter the project **Master Data** details (fields marked with * are mandatory).
    - Enter a name for the project.
    - The customer's name fills in automatically when the customer is assigned.
    - The **Assignee** field automatically displays the salesperson, when when the customer is assigned.
    - Set the **Status** to **Open**, **Closed**, or **Abandoned**.
    - C**reation Date** of the project is automatically set to the current date.
    - Enter **Publication Date** and **End of Contract**.
    - The **Proof of usage** tracking option is enabled by default. It sends automatic reminders if proof is not received within 30 days.
4. In the **Permissions** section, select the access groups that can view this project.
    - You can also grant customer access so the project appears in the webshop.
5. In the Custom Fields, add any project's details if available.
6. Click **Save**.



New Project setup window: Select Master Data Record

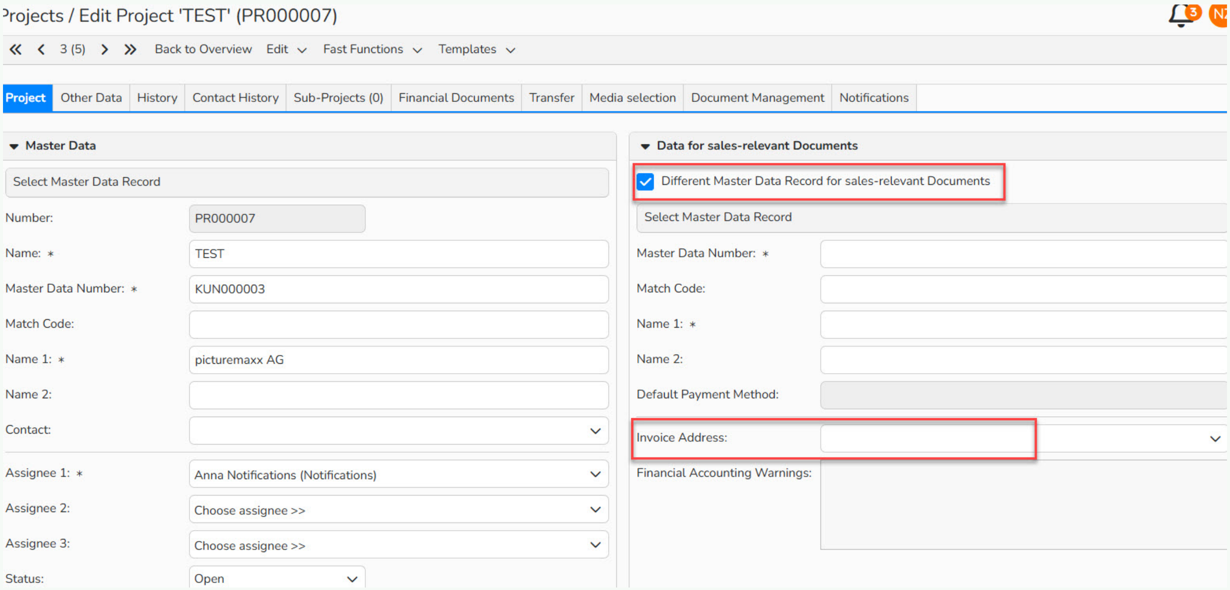


New Project setup window

> **Tip**
>
> **Different Master Data Record for sales-relevant Documents**

If you want the delivery and invoice addresses to be different in the financial documents created from the project (**Financial Documents** tab), enable **Different Master Data Record for sales-relevant Documents** and then select the invoice address.

For more information, see the Delivery and Invoice Addresses FAQ.



Different Master Data Record for sales-relevant Documents

Create a Sub-Project

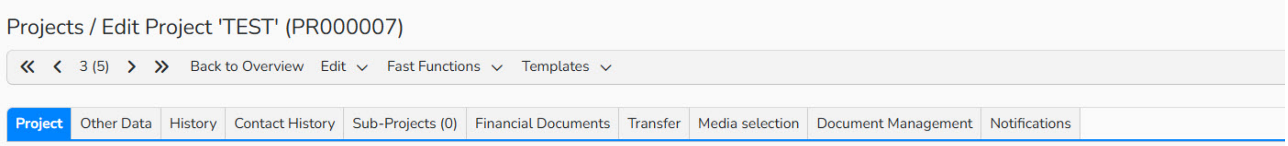
You can create one or more sub-projects related to this project. For example, a Van Gogh exhibition may include sub-projects such as a catalog, magazine, or poster.

To create a sub-project, follow these steps:

1. In **Project Management > Projects**, open an existing project, and switch to the **Sub-Projects** tab,
2. Select **Edit Sub-Projects > New**
3. Enter the sub-project details (some fields are automatically inherited from the main project).
4. Click **Save**.

Project’s tabs

The following tabs are available to manage projects and sub-projects:



Project’s tabs

Project

Displays all master data, as well as the controls to grant permissions to view the project.

History

Shows a log of all actions performed on this project.

Contact history

Displays all contact activities related to the project (such as emails, phone calls, meetings).

Sub-Projects

Lists sub-projects associated with this project. The number of sub-projects appears in parentheses.

Financial documents

Contains all financial documents linked to this project. Here, you can create a new document: select a document type and the associated project, then click **Create New**.

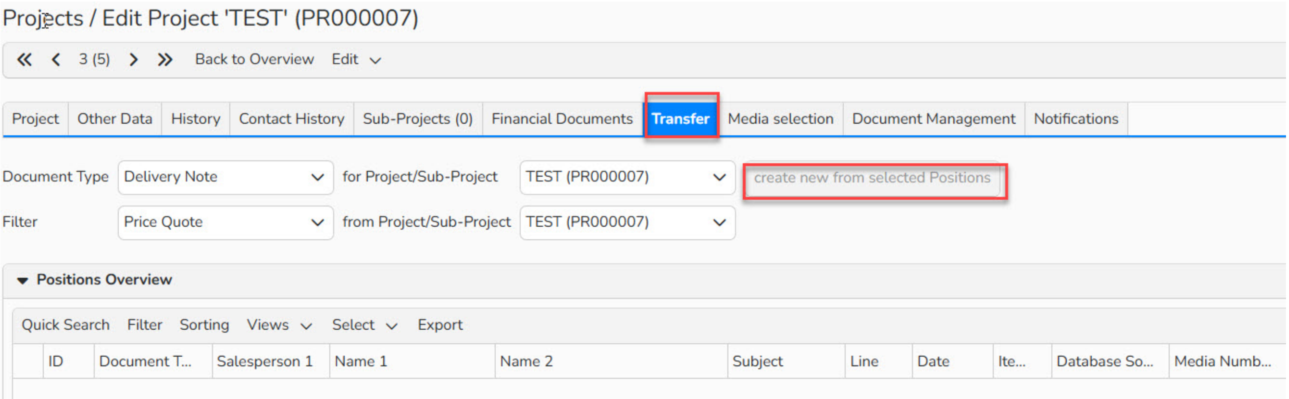
> **Note**
>
> For more information on the creation of financial documents, go to the Create Invoices and Other Sales-Related Documents FAQ.

Transfer

Contains controls to transfer data from one financial document to another. For example, from a quote to a delivery note.

1. Select the type of document you want to create and the associated project.
2. Filter the existing documents and select the associated project.

3. Select the items to add to the new document, then click **Create new from selected positions**.
4. The document is created. Click **Save**.



Edit Project > Transfer tab

Media selection

Lists all media files used within the project documents (and sub-projects).

Document management

Allows you to upload any attachments related to the project. For example, contracts, proofs of usage.

Notifications

Specify which users or access groups should receive notifications when the project changes or when its status is updated.

> **Note**
>
> The system automatically notifies the responsible person when someone adds or assigns an entry to the contact history.

Manage projects

You can access projects from:

- **Project Management > Projects**
- **Sales > Customers > Project** tab.

In the projects overview, configure the table columns to view the information you need.

> **Note**
>
> For more information, see the **Advanced Table Views** FAQ.

In the projects overview, you can:

Create a new entry

- Select **Edit > New.**

Edit an existing entry

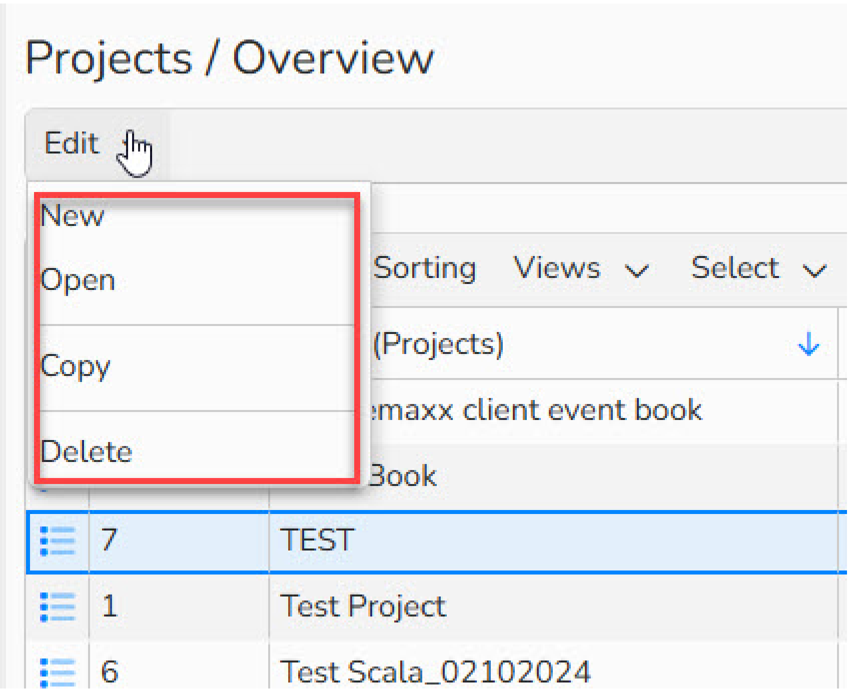
- Double-click its name or select it and click **Edit > Open.**

Copy an existing entry

- Select the record you want to copy and click **Edit > Copy.**

Delete an entry

- Select the record and click **Edit > Delete.**



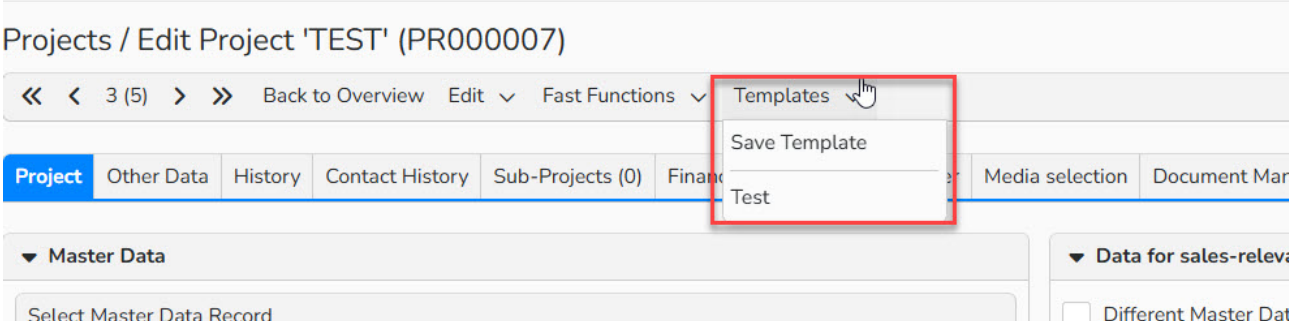
Project overview > Edit menu

Create a project template

You can create a template based on an existing project to pre-fill certain fields.

To do this, open the project and go to **Templates > Save Template**.

You can then select it from the **Templates** menu, or under **Project Management > Templates > Project Template**s.



Project window: Save Template