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User Guide to Dolibarr Projects

Dolibarr Version 11.0.4

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About This Guide

The user guide describes two applications of Dolibarr in **Projects/Collaborative Work Application**. The **Projects/Collaborative Work Application** has three modules. Each chapter of the user guide will explain one module of the application.

Dolibarr is a web-based application. Launch the application from your computer or log in to your Dolibarr account on a browser to access your account. See Dolibarr Log-in Guide.

Log in to see all of the activated applications on a horizontal menu bar on top of the page.

The **Projects/Collaborative Work Application** has three modules:

- The Projects or Leads
- Events/Agenda
- Resources

In this guide you learn how to use the three modules.

Projects/Collaborative Work Application	
The Projects or Leads	Registers leads for your prospective leads and ongoing projects.
Events/Agenda	Maintains customer-vendor relationships.
Resources	Registers the resources of the company from stationeries to properties.

Table 1: Projects Applications

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How to Apply These Terms to New Programs

1. Dolibarr Open Source ERP and CRM wiki documentation. (2007). Retrieved 10 August 2020, from https://wiki.dolibarr.org/index.php/FAQ_What_is_Dolibarr_licence_%3F

Audience

The Dolibarr user guide is intended for managers and owners of small and medium-sized enterprises, large companies, foundations, and freelancers that want to manage their projects and frontal applications on their websites.

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Projects or Leads Module

The Projects or Leads (Project) Module is one of the three modules of Dolibarr's Projects/Collaborative Work Application. Use it to register leads for your prospective leads and ongoing projects.

Activating the Projects Module

Complete the following steps to activate the Project Module:

1. Select the **Home** tab from the toolbar menu.
2. Click **Setup**.
3. Select **Modules/Applications**.
4. Scroll down to Projects/Collaborative Work application.
5. Toggle the **Projects or Leads Module.**

Note: You can search any application or module from the setup page.

Accessing the Project Module

Once you activate, the Project Module, See Activating the Projects Module on page 1, a new tab will appear at the toolbar menu. To access the module, select the **Project** tab from the toolbar menu.

On Project Area page, you see an overview of:

- Statistics - Leads amount of open projects by status
- Projects Draft
- Latest 3 modified projects

- Open projects by third parties
- Projects Open.

Viewing the List of Leads and Projects

Select **List** to view all ongoing projects and leads.

You can view projects and leads separately by selecting one of the following:

- List open leads
- List open projects.

Creating Leads and Projects

To create a new lead or project:

1. Select the **Project** tab from the toolbar menu.
2. Select **New Lead or Project** under the **Leads | Projects** menu.
3. Enter a unique reference in **Ref.** box.

Note: Dolibarr auto-fills the box by default. When you enter your reference with a relevant suffix, add a hyphen to separate it. By doing so, the automatic numbering works correctly for future projects. PJ2008-0620-MYSUFFIX is an example of a correct format.

4. **Label** the lead or project using proper keywords or the name of the project.
5. Define the **Usage** of the lead or project by checking appropriate boxes:
    - Follow opportunity
    - Follow tasks or time spent
    - Bill the time spent.

    Important: Time-sheets on tasks of project is a mandatory option to generate invoices for time spent. See Managing Time Spent on Tasks of Projects on page 11.

6. Enter a percentage estimate to identify the **lead probability.**
7. In the **Description** box, enter a brief description of the intended project or lead.

8. Select appropriate **Tags/Categories** from the formerly defined tag list. See Third Party Guide.
9. Select **CREATE DRAFT** to save the created lead or project in drafts.

Once you click the **CREATE A DRAFT**, you see a preview of your draft in a new page.

Finding a Draft Lead or Project

After you create a draft of a lead or a project See Creating Leads and Projects on page 2, you can validate, modify, clone or share it.

Immediately after you create a draft lead or project, you see a preview of your draft in a new page.

Alternatively, you can access your new draft by taking the following steps:

1. Select the **Project** tab from the toolbar menu.
2. Select the **List** from the **Leads | Projects** menu.
3. Search for the intended draft based on either of the following options:
    - Ref.
    - Label
    - Third-party
    - Start date
    - End date
    - Visibility
    - Lead status
    - Lead amount
    - Lead probability
    - Priority Status.
4. Select the draft of the intended lead or project.

You see your project draft.

Customizing the Draft Project

Customize your draft project to add more details and distinguish it from other project. To customize your draft project:

1. Open the intended draft. See Finding a Draft Lead or Project on page 3.
2. Select a **Third-Party** from the formerly created list. See Third-Party Guide.
3. Choose the **Visibility** options from the drop down menu to set privacy levels:
    - **Project Contacts** option makes the leads or projects available to users associated with the leads or projects.
    - **Everybody** option makes the Lead or Project available to the public.
4. Click on the calendar icon to set a **Start Date**.
5. Click on the calendar icon to set an **End Date**.
6. Set the **Lead Status** from the drop down menu:
    - Prospection
    - Qualification
    - Proposal
    - Negotiation
    - Won
    - Lost.
7. Enter the value of the lead in the **Lead Amount** box in default currency.
8. Enter the projected budget for the project in the **Budget** box in default currency.
9. Select the **Priority** level of the lead or project from the drop-down menu, on a scale of 1-5 (1 being the highest and 5 being the lowest.
10. Select **CREATE DRAFT** to save the created lead or project in drafts.

Once you click the **CREATE A DRAFT**, you see a preview of your draft in a new page.

Validating a Draft Lead or Project

After you create a draft of a lead or a project, See Creating Leads and Projects on page 2, you can validate, modify, clone or share it.

Immediately after you create a draft lead or project, you see a preview of your draft in a new page.

Alternatively, you can access your new draft by taking the following steps:

1. Select the **Project** tab from the toolbar menu.
2. Select the **List** from the **Leads | Projects**.
3. Search for the intended draft based on either of the following options:
    - Ref.
    - Label
    - Third-party
    - Start date
    - End date
    - Visibility
    - Lead status
    - Lead amount
    - Lead probability
    - Priority Status.
4. Select the draft of the lead or project is question.
5. Review the draft.
6. Select **VALIDATE**.

Your draft lead or project is now a confirmed and validated lead or project.

Modifying a Project

After you create a draft of a lead or a project See Creating Leads and Projects on page 2, you can modify it and change its status to an open lead or project.

To modify a draft of the project take the following steps:

1. Find the draft lead or project See Finding a Draft Lead or Project on page 3.

2. Select **MODIFY** to make intended changes.
3. New tabs appear at the top menu of the draft page.
4. The Project tab is the default tab and lets you edit the following options:

   a. Edit your unique reference in **Ref.** box.

   Note: Dolibarr auto-fills the box by default. When you enter your reference with a relevant suffix, add a hyphen to separate it. By doing so, the automatic numbering works correctly for future projects. PJ2008-0620-MYSUFFIX is an example of a correct format.

   b. Enter a proper keyword or name in the **Label** box.

   c. Edit the **Usage** of the lead or project by checking appropriate boxes:

   - Follow opportunity
   - Follow tasks or time spent
   - Bill the time spent.

   Important: You must enter time-sheet for each project tasks to generate invoices based on time and to bill customers for the time you spent on their order.See Managing Time Spent on Tasks of Projects on page 11

6. Edit the selected **Third-Party** from the formerly created list. See Third Party Guide.
7. Set privacy levels by editing the **Visibility** options from the drop down menu:

   - **Project contacts** option makes the leads or projects available to users associated with the leads or projects.
   - **Everybody** option makes the lead pr project available to the public.

8. Click on the calendar icon to set a **Start Date**.
9. Click on the calendar icon to set an **End Date**.

Modifying Leads Status

After you create a draft of a lead or a project See Creating Leads and Projects on page 2, you can modify the status of the leads:

To modify the status of the leads take the following steps:

1. Find the draft lead See Finding a Draft Lead or Project on page 3.
2. Select **MODIFY** to make intended changes.
3. Edit the **Lead Status** from the drop down menu:
    - Prospection
    - Qualification
    - Proposal
    - Negotiation
    - Won
    - Lost.
4. Edit a percentage estimate to identify the **Lead Probability**.
5. Edit the value of the lead in the **Lead Amount** box.
6. Enter the predicted budget for the project in the **Budget** box.
7. Edit the description of the lead or project in the **Description** box.
8. Select appropriate **Tags/Categories** from the formerly defined tag list. See Third Party Guide.
9. Edit the **Priority Level** of the lead or project from the drop-down menu. On a scale of 1-5 (1 being the highest and 5 being the lowest).

Modifying Contacts of Project

After you create a draft of a lead or a project See Creating Leads and Projects on page 2, you can view and modify the contacts of the leads or projects.

Viewing a List of Contacts in the Project

After you create a draft of a lead or a project, See Creating Leads and Projects on page 2, you can see the list of users and third-parties associated with the lead or project.

To view a list of the users, third parties and their contacts take the following steps:

1. Select the **Project** tab from the toolbar menu.
2. Select the **List** from the **Leads | Projects** menu.
3. Find the intended lead or project, or a draft of the lead or project. See Finding a Draft Lead or Project on page 3.
4. Select **MODIFY** to make intended changes.
5. New tabs appear at the top menu of the draft page. Click on **Contact of Project**.

Note: The number appearing next to the title of the **Contacts of Project** tab indicates the number of users associated with the leads or projects.

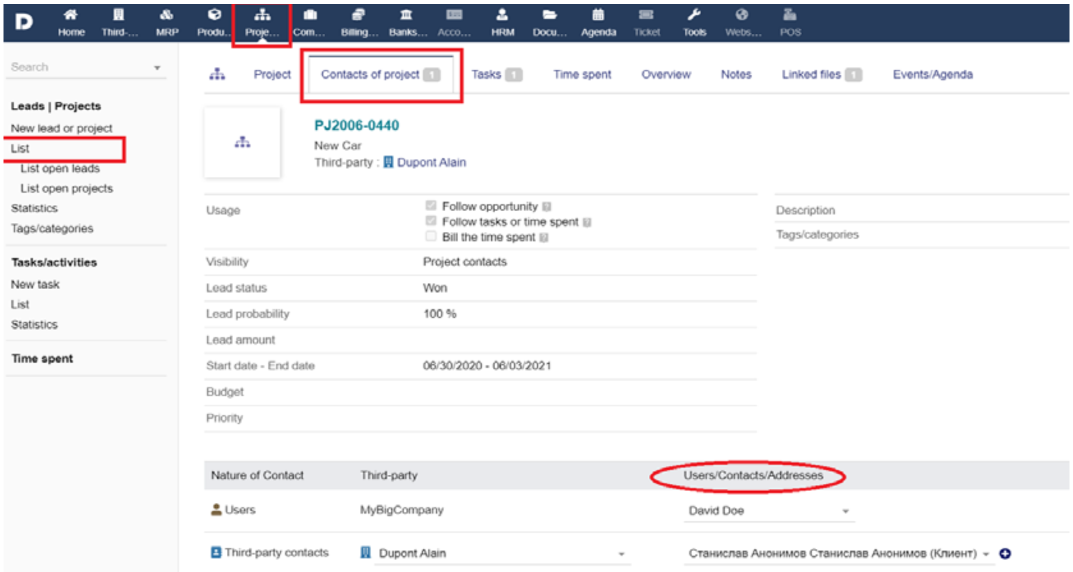
6. Scroll down the page to contacts tables. The table has two rows:
   a. **Users**: creators of the company and the Dolibarr project.
   b. **Third-Party Contacts**: contacts formerly created at the **Third Parties** tab. See Third Party Guide.

For each contact, you can change their access to your Dolibarr project.

Changing users' access

To change the **Users**' access, appearing on the first row, take the following steps:

1. Under the **Users/Contacts/Addresses** column, choose the intended user from the drop-down menu.
2. Under the **Contact Type** column, assign the intended role for the user from the drop-down menu. Dolibarr defined two roles by default:
   c. Select the **Contributor** role for a user who contributes to the project.
   d. Select the **Project Leader** role for a user who leads a project.
3. After assigning the roles, click **ADD**.



You added a user or a user contact to your project.

Note: You can create new Contact Types at Dictionaries Setup. See Dolibarr Dictionaries.

Changing Third-Party Contacts

To change the **Third-Party Contacts**' access, appearing on the second row, take the following steps:

1. Under the **Third-Party** column choose the relevant third-party contact
2. Under the **Contacts/Addresses** column, choose the intended third-party contact from the drop-down menu.

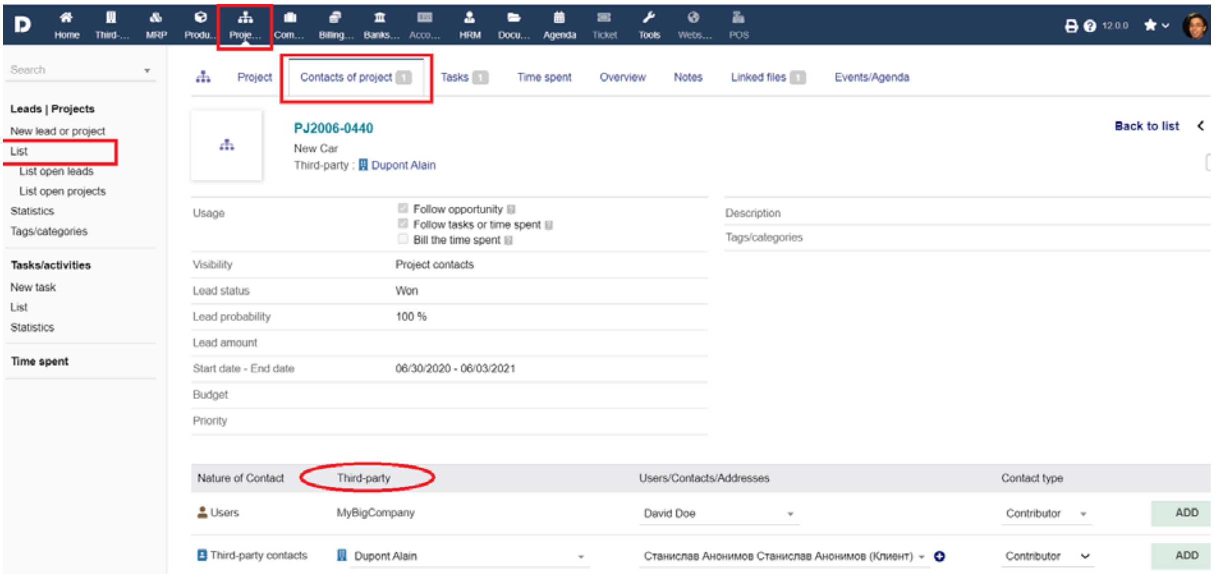
   c. Click the plus sign icon to create contact/address. See the Users & Groups Module.
3. Under the **Contact Type** column, assign the intended role for the user from the drop-down menu. Dolibarr defined two roles by default:

   d. Select the **Contributor** role for a third-party contact who contributes to the project

   e. Select the **Project Leader** role for a third-party contact who leads a project

   Note: You can create new Contact Types at **Dictionaries Setup**. See Dolibarr Dictionaries.

4. After assigning the roles, click **ADD**.



You added a user or a third-party contact to your project.

Creating Tasks for Projects

After you create a draft of a lead or a project See Creating Leads and Projects on page 2, you can tasks relevant to the intended lead or project.

To open the menu to create a task for the lead or project you can use two methods.

Method 1

1. Select the **Project** tab from the toolbar menu
2. Select the **List** from the **Leads | Projects** menu.
3. Find the intended lead or project, or a draft of the lead or project. See Finding a Draft Lead or Project on page 3.
4. Review the draft.
5. Select **MODIFY** to make intended changes.
6. New tabs appear at the top menu of the draft page. Click **Tasks**.

Note: The number appearing next to the **Task** tab indicates the number of tasks associated with the leads or projects.

7. Scroll down the page to the list of task. Click on the plus sign icon above the **Create Task** label.

Method 2

1. Select the **Project** tab from the toolbar menu.
2. Select **New Task** from the Leads | Projects menu on the left hand side, under **Tasks/Activities**.

After opening the menu to create a new task, follow the following steps to complete the process:

1. Fill in the **Label** box.
2. On the **Child of Project/Task,** choose the intended project from the drop-down menu.
3. From the **Assigned to** drop-down menu, assign the intended user for the task.
4. Click on the calendar icon to set a **Start Date**.
5. Click on the calendar icon to set an **End Date**.
6. Fill the **Planned Workload** to set the expected duration of time to complete the task.
7. Use the **Declared Progress** drop-down menu to announce the percentage of the task progressed from 0% to 100%.
8. In the **Description** box, enter a brief description of the task.
9. Select **ADD** to create the task.

Important: Task Module does not have a save draft option. Clicking **CANCEL** discards the changes.

Managing Time Spent on Tasks of Projects

Use projects to manage the time spent on each task of the project. If you enter the time and detailed information about the tasks of the projects, you will have the option to manage the time spent.

Note: Time Spent option is not mandatory to create a task but you must enter time-sheet for tasks to generate invoice(s) and bill customers based on the time spent on tasks.

1. Select **MODIFY** to make intended changes.
2. New tabs appear at the top menu of the draft page. Select the **Time Spent** tab.
3. Scroll down the page to the **List of time consumed on tasks of project**.

Note: The number appearing next to the **List of Time Consumed on Tasks of Project** table indicates the number of tasks that have a time-sheet.

4. Click on the plus sign icon above the **Create Time Spent** label.
5. Click on the calendar icon to fill the Date box.
6. Below the Date box, fill in the time in 24 hour format using the drop-down menu.
7. From the **Task** drop-down menu, choose the intended task.
8. From the **By** drop-down menu, choose the user who is assigned to the task.
9. In the **Note** box, enter a brief note about the task.
10. Fill the percentage of the task done, in the **Declared Progress**.
11. Select **ADD** to save the time sheet.

Note: Time Sheet option does not support a save draft option. Clicking **CANCEL** discards the changes.

Once you save the time sheet, based on the Lead or Project Amount See Creating Leads and Projects on page 2and the time spent, Dolibarr calculates the value of the time spent for billing purposes.

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The Events/Agenda Module

The Events/Agenda (Agenda) Module is one of the three modules of Dolibarr's Projects/Collaborative Work Application. Use the Agenda Module and the events feature to maintain customer-vendor relationships.

Activating the Agenda Module

Complete the following steps to activate the Agenda Module:

1. Select the **Home** tab from the toolbar menu.
2. Click **Setup**.
3. Select the **Modules/Applications** link.
4. Scroll down to Projects/Collaborative Work application.
5. Toggle the **Events/Agenda Module**.

Note: You can search the any application or module from the search-field in the setup page.

Accessing the Agenda Module

Once you activate the Agenda Module See Activating the Agenda Module on page 13, the Agenda tab will appear at the toolbar menu.

To access the module, select the **Agenda Module** tab from the toolbar menu.

On Agenda page, you see a monthly overview of the internal calendar.

Viewing Events

Access the Agenda tab. See Accessing the Agenda Module on page 13. In Agenda page, you see a monthly overview of the internal calendar. Change the view setting by clicking one of the following tabs:

- List view
- Month view
- Week view
- Day view
- Per user view.

Filter your agenda by the following factors:

- Type
- Events assigned to users
- Events assigned to group
- Resource
- Third-party
- Project.

Creating Events

To create an event at the Agenda, take the following steps:

1. Select the **Agenda Module** tab from the toolbar menu.
2. Click on the **New Event** link.
3. Enter a **Label** for your event.
4. Click on the calendar icon to set a **Start Date**
5. Click on the calendar icon to set an **End Date**

Note: If it is a day-long event, check the **Event on all day(s)** box.

Important: Clicking on **Now** will change the date to today's date but does not change the time of the day.

6. Choose an option to **Repeat Event** from the drop-down menu:

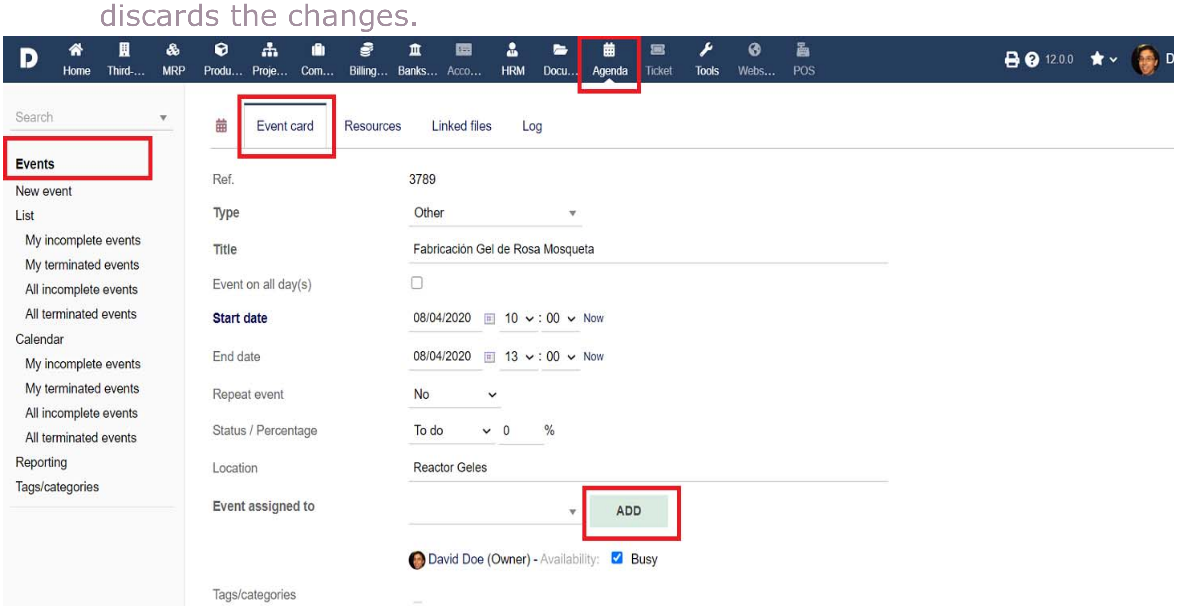
- No
- Every month
- Every week.

7. Set the **Status/Percentage** of the event from the drop-down menu to indicate the progress of the event:
    - Not applicable
    - To do
    - In progress
    - Finished.
8. Enter the **Location**, where the event takes place.
9. Assign a user to the event from the **Event Assigned To** drop-down menu.
10. Click **ADD**.

Note: You can assign more than one user to an event.

11. A delete button appears next to the user's name. Press the delete button to delete the assign user.
12. Select **ADD** to add the event.

Note: New Event does not support a save draft option. Clicking **CANCEL** discards the changes.



Customizing the Events

You can customize the events to make them suit your business's needs better. To customize an event take the following steps:

1. Find the intended event.
2. Select the **Modify**.
3. Select appropriate **Tags/Categories** from the formerly defined tag list. See Third Party Application.
4. Select the associated third-party from the **Related Company** drop-down menu.
5. Select the associated contact from the **Related Contact** drop-down menu. See Third-Party Application.
6. To select the associated project or lead do one of the followings:
    - Select a project from the **Project** drop-down menu. See Viewing the List of Leads and Projects on page 2.
    - Press the plus sign icon to create a new project. See Creating Leads and Projects on page 2.
7. Select the associated task from the **Task** drop-down menu.
8. Enter the priority of the event at your desired scale.
9. In the **Description** box, enter a brief description of the task.
10. Review the changes you made and do one of the followings:
    - If you are happy with the changes, click **Save** to save the customized changes.
    - If you want to discard the changes, click **Cancel**.

Finding the Events

After you create an event, See Creating Events on page 14, you find it in two view options:

- List View
- Calendar View.

Finding Events in List View

1- Select the **Agenda** tab from the toolbar menu.

2. Select the **List View** from the left hand side menu.
3. Choose from one of the followings:
   - List view
   - Per user view.
4. Search for the intended draft based on either of the following filters:
   - Type
   - Events assigned to users
   - Events assigned to any users in group
   - Resource See Resources Module on page 19
   - Third-Party
   - Project.
5. Press **REFRESH** to find the intended event.

Finding Events in Calendar View

1- Select the **Agenda** tab from the toolbar menu.

2. Select the **Calendar View** from the left hand side menu.
3. Choose one of the following time periods:
   - Month View
   - Week View
   - Day View.
4. Search for the intended draft based on either of the following filters:
   - Type
   - Events assigned to users
   - Events assigned to any users in group
   - Resource
   - third-Party

- Project
- Status.

5. Press **REFRESH** to find the intended event.

3

Resources Module

The Resource Module is a an optional module at Dolibarr's Projects/ Collaborative Work Application. Use it to register the resources of the company from stationeries to properties.

Activating the Resource Module

Complete the following steps to activate the Resource Module:

1. Select the **Home** tab from the toolbar menu.
2. Click **Setup**.
3. Select the **Modules/Applications**.
4. Scroll down to Projects/Collaborative Work application.
5. Toggle the **Resources Module** .

Note: You can search the any application or module from the search-field in the setup page.

Accessing the Resource Module

Once you activate the Resource Module, it appears under the **Tools** tab at the toolbar menu.

To access the module, select the **Tools** tab from the toolbar menu, it is on the menu on the left of the page.

Creating Resources

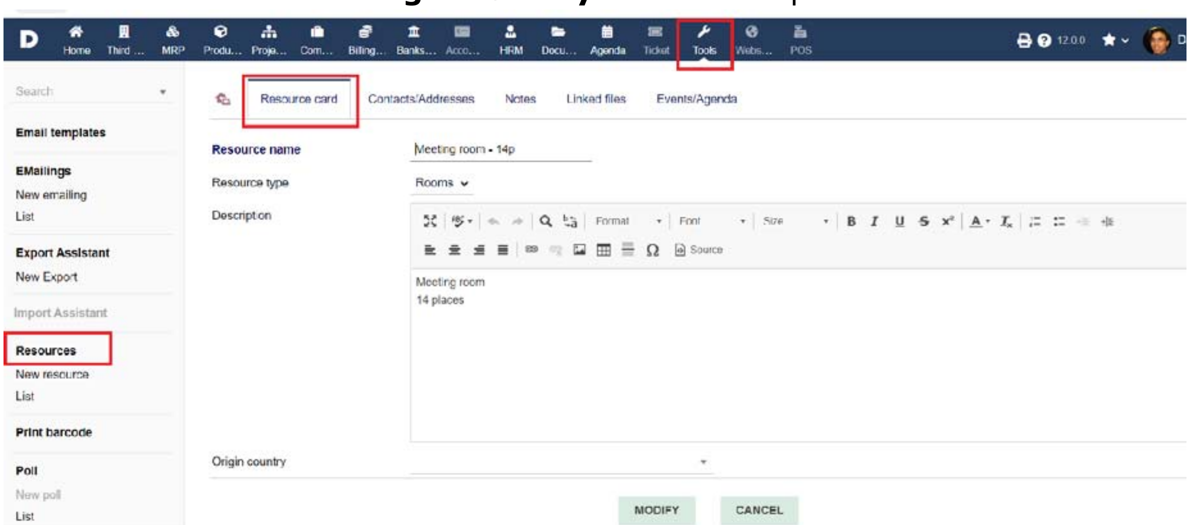
To create a new resource:

1- Select the **Tools** from the toolbar menu.

2. Select **New Resource** on the menu on the left side of the page.
3. Enter the **Resource name**.
4. Select the **Resource type** from the drop-down menu.

5- Enter a brief description of the resource.

6- Select the **Origin Country** from the drop-down menu.



Viewing Resource List

To view a list of resources:

1- Select the **Tools** from the toolbar menu.

2. Select **List** under **Resources** on the menu on the left side of the page.

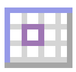
Deleting Resources

To Delete a list of resources:

1- Select the **Tools** from the toolbar menu.

2. Select **List** under **Resources** on the menu on the left side of the page.
3. Click on the delete button next to the intended resource.

Table of Icons

Icon	Icon Text	Action
	Project Module	Click the **Project Module** to manage prospective leads and current projects.
	Third-Party Module	Click the **Third Parties Module** icon to manage prospect and current customers and suppliers.
	Calendar	Click the **Calendar** icon to set a date.
	Add	Click **Add** to add an item in the relevant menu.
	Agenda Module	Click the **Agenda Module** to manage events.
	Delete	Click **Delete** to remove an item.
	Tools	Click the **Tools** icon to find access to the Resources Module.
	Resources	Click the **Resources Module to** to register the resources of the company.

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