

Grouping Project & Contracts

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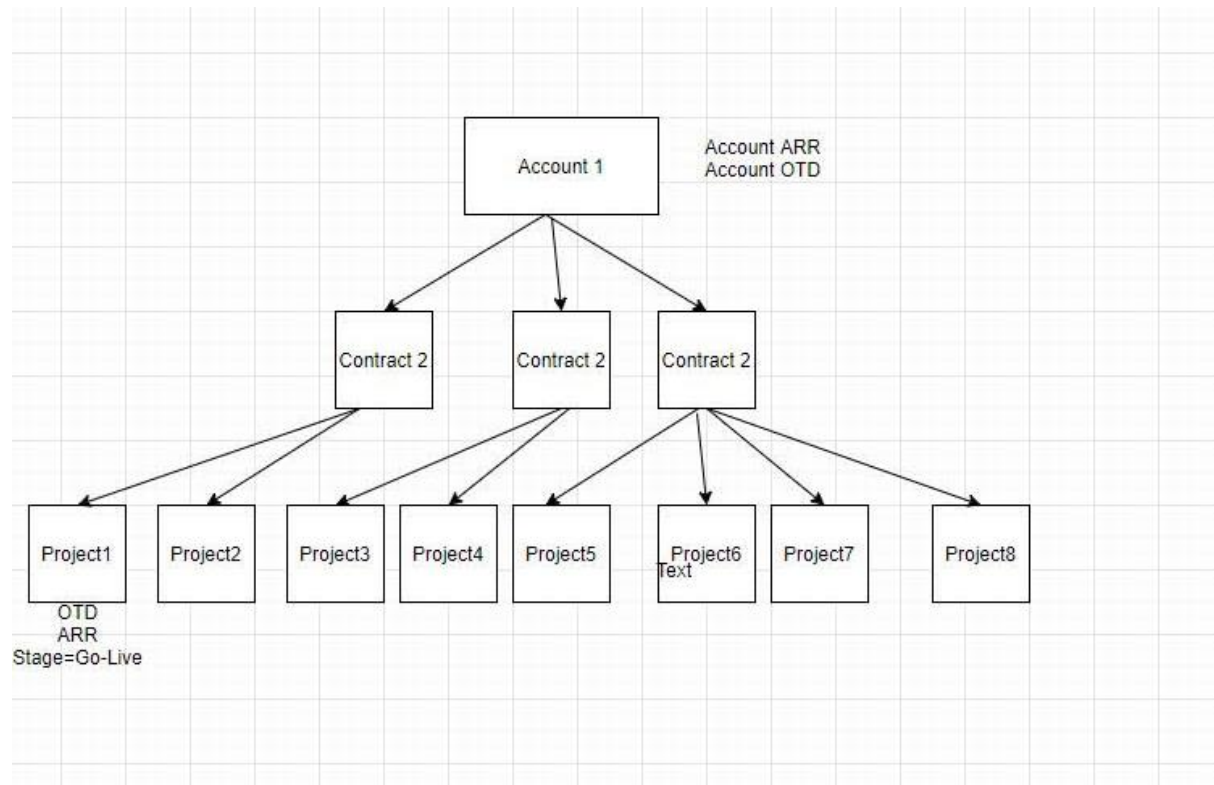


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Requirement: Based on Project grouping stamp value on Contracts and based on contracts stamp on Account

Synopsis:

- Projects are related to Contracts. One Contract can have multiple Projects. Similarly Contract is child of Account. See diagram below



- Project has a Project Stage field with values:

Yet to Kick-off
Discover
Design
Develop
UAT
Go-Live
On-Hold
Dropped

Ask is to Create a picklist field on Contract called “Contract grouped Stage” and populate the value in this field based on below

Contract grouped Stage will have picklist values:

Develop, Yet to Kick-Off, Go-Live, On-Hold, Dropped

Example : if one contract has one project with project stage as Discover , then contract will have value **Develop**. Same applies for Design, Develop & UAT

Now if there are two projects under on contract with one as GoLive and other Dropped then these two should be combined as go-Live

Similar combinations are pasted below. These should keep on happening for n number of combinations until final value is rolled up to contract

Next once the contract values are rolled up , same calculation should roll up to account based on values of all the contracts related to account.

Discover = Develop			
Design = Develop			
Develop = Develop			
UAT = Develop			
Yet to Kick-Off = Yet to Kick-Off			
Go-Live = Go-Live			
On-Hold = On-Hold			
Dropped = Dropped			
Go-Live + Dropped = Go-Live			
Yet to Kick-Off + Dropped = Yet to Kick-Off			
Go-Live + Yet to Kick-Off = Partial			
Go-Live + Develop = Partial			
Go-Live + On-Hold = Partial			
On-Hold + Develop = Develop			
Dropped + Develop = Develop			
Dropped + On-Hold = On-Hold			
Go-Live + On-Hold + Dropped = Partial			
Go-Live + Develop + On-Hold = Partial			
Go-Live + Develop + Dropped = Partial			
Go-Live + On-Hold + Dropped + Develop = Partial			
Dropped + On-Hold + Develop = Develop			
Partial+On-Hold+Develop+Go-Live+Yet To Kick Off = Partial			

Estimate Price: 5500 INR.