Purchase to Project

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The Purchase to Project SuiteApp lets project managers create and manage purchase transactions related to projects and project tasks. This SuiteApp provides a unified project purchasing experience and gives insight into project purchases. Using this SuiteApp, project managers can have better control over project spending and cash flow for project-related purchases.

Project managers can do the following using this SuiteApp:

- View purchase orders and vendor bills entered for a project or project task.
- Initiate purchase orders from a project or project task.
- Allow or prevent creation of purchase orders and vendor bills for a project or project task.
- Find and distinguish approved project vendors.
- View the total invoiced amount from billable items and expenses for a project.

This SuiteApp is available in all languages that NetSuite supports. For more information, read the help topics Configuring Multiple Languages and Choosing a Language for Your NetSuite User Interface.

Read the following to know more about this SuiteApp:

- Prerequisites for Purchase to Project
- Installing the Purchase to Project SuiteApp
- Setting Up the Purchase to Project SuiteApp
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- Best Practices in Using the Purchase to Project SuiteApp
- Limitations in Using the Purchase to Project SuiteApp

Availability

Purchase to Project is a public and managed SuiteApp. As a managed SuiteApp, it is automatically updated when enhancements or new features are added.

For instructions on installing this SuiteApp, see Installing the Purchase to Project SuiteApp.

Prerequisites for Purchase to Project

Before installing Purchase to Project, an administrator must enable the following required features:

Subtab	Feature
Company	Projects
	Project Management
	Job Costing and Project Budgeting **Note:** This feature is required to show the **Project Tasks** column in the **Procurement** subtab of the project record. For more information, see Viewing Purchase Orders and Vendor Bills Entered for a Project.
Accounting	Accounting
	A/R
SuiteCloud	Client SuiteScript
	Server SuiteScript
	SOAP Web Services
	SuiteCloud Development Framework

For information about enabling features, read the help topic Enabling Features.

Installing the Purchase to Project SuiteApp

Purchase to Project requires a NetSuite OneWorld account.

Before installing this SuiteApp, read Prerequisites for Purchase to Project.

> **Note:** Your account manager must enable required feature sets to ensure this SuiteApp works in your account. Contact your account manager for more information.

Any role with access to the SuiteApp Marketplace can install this SuiteApp. For more information about the SuiteApp Marketplace, see the help topic SuiteApp Marketplace in NetSuite.

To install the Purchase to Project SuiteApp:

1. Go to **SuiteApps**.

   The **SuiteApps** tab is not available for the following centers:

   - Advanced Partner Center
   - Customer Center
   - Employee Center
   - Partner Center
   - Support Center
   - Vendor Center
2. In the **Search SuiteApps** field, enter **Purchase to Project** to search for the SuiteApp.
3. Click the Purchase to Project SuiteApp tile.
4. On the top right corner of the page, click **Install**.

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The SuiteApp installation runs scheduled scripts and modifies records. The process may take a while to finish.

For information on the installation status, see the help topic Viewing SuiteApp Installation or Uninstallation Status.

Setting Up the Purchase to Project SuiteApp

You must set up the Purchase to Project SuiteApp after installation. For instructions, read the following topics:

- Purchase to Project SuiteApp Roles and Permissions
  - Setting Required Permissions for Purchase to Project Custom Roles
  - Setting Employee Restrictions for the Purchase to Project Custom Consultant Role
- Setting Purchase Order and Vendor Bill Preferences for Projects

Purchase to Project SuiteApp Roles and Permissions

There are no custom roles included with the Purchase to Project SuiteApp. An administrator must do the following to set up the Purchase to Project roles and permissions:

1. Create custom project manager and consultant roles or edit existing roles. For more information, see the help topic Customizing or Creating NetSuite Roles.
2. Set the required permissions for the custom consultant and project manager roles. For more information, see Setting Required Permissions for Purchase to Project Custom Roles.
3. Set the employee restrictions for the custom consultant role. For more information, see Setting Employee Restrictions for the Purchase to Project Custom Consultant Role.

Setting Required Permissions for Purchase to Project Custom Roles

To set the required permissions for custom roles:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Edit** beside the custom role.

   The following permission levels are available:

   - **View** – Users with this permission can only view records.
   - **Create** – Users with this permission can create and view records.
   - **Edit** – Users with this permission can create, view, and edit records.
   - **Full** – Users with this permission can create, view, edit, and delete records.

   Refer to the following table for the custom roles required for this SuiteApp and the corresponding minimum permissions required for these roles.

Custom Role	Subtab	Permission	Minimum Permission Level Required
Project Manager	Transactions	Bills	Edit

Custom Role	Subtab	Permission	Minimum Permission Level Required
		Invoice	View
		Purchase Order	Edit
	Lists	Customers	View
		Projects	Edit
		Project Tasks	Edit
		Vendors	View **Note:** Edit permission is required for a role to be able to tag a vendor as a project vendor. For more information, see Tagging a Vendor as a Project Vendor.
	Setup	(Optional) Import CSV File	Full
		(Optional) Set Up Company	View
Consultant	Transactions	Bills	View
		Invoice	View
		Purchase Order	Edit
	Lists	Customers	View
		Projects	View
		Project Tasks	Create
		Vendors	View **Note:** Edit permission is required for a role to be able to tag a vendor as a project vendor. For more information, see Tagging a Vendor as a Project Vendor.
	Setup	(Optional) Import CSV File	Full
		(Optional) Set Up Company	View

Setting Employee Restrictions for the Purchase to Project Custom Consultant Role

After setting permissions for the custom consultant role, an administrator must also set the employee restrictions for this role. Setting employee restrictions enables consultants to view purchase orders and vendor bills on the **Procurement** subtab of the project record.

To set employee restrictions for the custom consultant role:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Edit** beside the custom consultant role.

3. In the **Employee Restrictions** field, select from any of the following:
   - none - no default
   - none - default to own
   - own, subordinate, and unassigned
   - own and subordinates only

   > **Note:** If you select **own and subordinates only** or **own, subordinate, and unassigned**, you must also check the **Allow Viewing** box next to the **Employee Restrictions** field.

   For more information on employee restrictions, see the help topic Setting Employee Restrictions.

Setting Purchase Order and Vendor Bill Preferences for Projects

You can enable or disable preferences to allow or prevent saving of purchase orders and vendor bills entered for a project or project task.

These preferences are enabled by default in the following scenarios:

- When creating a new project record.
- When project records are created using SuiteScript and CSV import.

> **Note:** In existing project records, these preferences are enabled during SuiteApp installation.

Allowing Purchase Orders for a Project or Project Task

To allow purchase orders for a project or project task:

1. Go to Lists > Relationships > Projects.
2. Click **Edit** next to the project that you want to edit.
3. In the **Preferences** subtab of the project record, check the **Allow Purchase Orders** box.

   When this box is checked, purchase orders can be entered and saved for the project and for project tasks under it, regardless of the project status. A **Create Purchase Order** button also becomes available on the project record and on the project task records under the project.

   > **Note:** The **Allow Purchase Orders** box is checked by default. You can clear the **Allow Purchase Orders** box to prevent saving of purchase orders entered for the project and for project tasks under it.

Allowing Vendor Bills for a Project or Project Task

To allow vendor bills for a project or project task:

1. Go to Lists > Relationships > Projects.

2. Click **Edit** next to the project that you want to edit.
3. In the **Preferences** subtab of the project record, check the **Allow Vendor Bills** box.

   When this box is checked, vendor bills can be entered and saved for the project and for project tasks under it, regardless of the project status.

   > **Note:** The **Allow Vendor Bills** box is checked by default. You can clear the **Allow Vendor Bills** box to prevent saving of vendor bills entered for the project and for project tasks under it.

Tagging a Vendor as a Project Vendor

Tagging a vendor as a project vendor lets you identify vendors that provide goods and services that are specific for projects and project tasks.

When a vendor is identified as a project vendor, it becomes available for selection in the **Project Vendor** field on the **Custom Purchase Order - Projects** form. The **Project Vendor** field lets you distinguish and select only approved project vendors when entering purchase orders for a project or project task.

> **Note:** For a role to be able to tag a vendor as a project vendor, edit permission level is required for the Vendors Lists permission. For more information, see Purchase to Project SuiteApp Roles and Permissions.

To tag a vendor as a project vendor:

1. Go to Lists > Relationships > Vendors.
2. Click **Edit** next to the vendor record that you want to edit.
3. In the Classification section, check the **Project Vendor** box.

   > **Note:** The **Project Vendor** box is only available in the standard vendor form. It may not be available for some SuiteSuccess editions that have other default vendor forms. You or your administrator may need to customize the vendor form to add the **Project Vendor** box.

4. Click **Save**.

Entering Purchase Orders for Projects and Project Tasks

Using this SuiteApp, you can enter purchase orders using a custom form that is specific for projects and project tasks. The custom form also lets you transact only with approved project vendors.

> **Note:** Before entering purchase orders for projects or project tasks, make sure the preference to allow purchase orders for projects and project tasks is enabled. For more information, see Allowing Purchase Orders for a Project or Project Task.

To enter purchase orders for projects and project tasks:

1. Go to Lists > Relationships > Projects.
2. Click **View** next to the project where you want to create a purchase order or the project that has the project task where you want to create a purchase order.
3. If you are entering a purchase order for a project task, select the project task name from the Project Tasks/Milestones table on the **Schedule** subtab.
4. On the project record or project task record, click the **Procurement** subtab.
5. On the **Purchase Orders** subtab, click **Create Purchase Order**.

   When you use the **Create Purchase Order** button, the purchase orders and vendor bills you create are automatically linked to the project or project task.

   > **Note:** The **Create Purchase Order** button is only available when the preference to allow purchase orders for the project or project task is enabled. For more information, see Allowing Purchase Orders for a Project or Project Task.

6. On the purchase order form, perform the following steps:
   a. In the **Custom Form** field, select **Custom Purchase Order - Projects**.

      > **Note:** This custom form is the default form for consultant roles that use this SuiteApp. For other roles, you must manually select this form or an administrator must set this custom form as the default form for the role. For information on setting a default form for a role, see the help topic Defining Preferred Forms.

   b. In the **Project Vendor** field, select a project vendor.

      Only vendors tagged as project vendors in the vendor record are included in the list. For more information, see Tagging a Vendor as a Project Vendor.

      The project vendor you select also becomes the entry in the **Vendor** field.

   c. In the **Receive By** field, select a date when the items in the purchase order are needed.

      > **Note:** You must enter a date that is not beyond the project or project task end date.

   d. In the **Date** field, select a posting date for the purchase order.
   e. In the **Memo** field, enter a memo to describe the purchase order.
   f. Add items or expenses in the purchase order. For more information on adding items and expenses, see the help topic Entering a Purchase Order.

      > **Note:** You must associate the purchase order to the project or project task.
      >
      > - To associate the purchase order to a project, select the project name in the **Customer** column when adding items or expenses.
      > - To associate the purchase order to a project task, select the task name in the **Project Task** column when adding items or expenses.
      >
      > For more information, see Associating Purchase Orders and Vendor Bills to a Project or Project Task.

   g. Click **Save**.

Associating Purchase Orders and Vendor Bills to a Project or Project Task

When using the Purchase to Project SuiteApp, you must associate the items and expenses in a purchase order or vendor bill to a project or project task. This is to establish connection to the project or project task and to display the purchase orders and vendor bills in the **Procurement** subtab of the project record or project task record.

To associate purchase orders and vendor bills to a project or project task:

1. Enter a purchase order or vendor bill.

   For instructions, see the help topics Entering a Purchase Order and Vendor Bills.
2. When entering items or expenses in the purchase order or vendor bill, do the following:
   - To associate the purchase order or vendor bill to a project, select the project name in the **Customer** column.
   - To associate the purchase order or vendor bill to a project task, select the task name in the **Project Task** column.
3. Click **Save**.

Viewing Project Procurement Transactions

You can view procurement transactions entered for projects and project tasks from the **Procurement** subtab of the project record or project task record. For more information, read the following topics:

- Viewing the Total Invoiced Amount From Billable Items and Expenses for a Project
- Viewing Purchase Orders and Vendor Bills Entered for a Project
- Viewing Purchase Orders and Vendor Bills Entered for a Project Task

Viewing the Total Invoiced Amount From Billable Items and Expenses for a Project

To view the total invoiced amount from billable items and expenses for a project:

1. Go to Lists > Relationships > Projects.
2. Click **View** next to the project with the details you want to view.
3. On the project record, click the **Procurement** subtab.

   You can view the total invoiced amount from billable items and expenses for the project on the left corner of the subtab. The amount is in the project’s primary currency and does not include taxes.

Viewing Purchase Orders and Vendor Bills Entered for a Project

You can view purchase orders and vendor bills entered for a project from the project record. Only purchase orders and vendor bills that are associated with the project are displayed. For more information, see Associating Purchase Orders and Vendor Bills to a Project or Project Task.

To view purchase orders and vendor bills entered for a project:

1. Go to Lists > Relationships > Projects.
2. Click **View** next to the project with purchase orders or vendor bills you want to view.
3. On the project record, click the **Procurement** subtab.
4. Click the **Purchase Orders** subtab to display the purchase orders entered for the project.

   The **Purchase Orders** subtab contains a table with the following information:

Column	Description
Edit | View	Click **Edit** to open the purchase order in edit mode. Click **View** to open the purchase order in view mode.
Date	This column displays the purchase order date.
PO #	This column displays the purchase order number.
Vendor	This column displays the vendor name in the purchase order. Click the vendor name to open the vendor record.
Amount	This column displays the purchase order amount in the project's primary currency. **Note:** The amount shown does not include taxes. Open the transaction record to see the full transaction amount, including taxes.
Status	This column displays the status of the purchase order.
Receive By	This column displays the date when the items in the purchase order are needed. The value is from the **Receive By** date field in the purchase order form.
Project Tasks	This column displays the project tasks that are associated with the purchase order. Only a maximum of 300 characters or around ten project tasks can be displayed in this column. You can view all project tasks in the **Schedule** subtab of the project record **Note:** This column is only available when the Job Costing and Project Budgeting feature is enabled.

5. Click the **Vendor Bills** subtab to display the vendor bills entered for the project.

   > **Note:** The amounts shown do not include taxes. Open the transaction record to see the full transaction amount, including taxes.

   The **Vendor Bills** subtab contains a table with the following information:

Column	Description
Date	This column displays the vendor bill date.
Transaction Number	This column displays the vendor bill transaction number. Click the transaction number to open the vendor bill record.
PO #	This column displays the purchase order number of purchase orders related to the vendor bill. Only a maximum 300 characters or around ten purchase orders can be displayed in this column. You can view all purchase orders related to the vendor bill in the **Related Records** subtab of the vendor bill record or project record.
Vendor	This column displays the vendor name in the vendor bill.

Column	Description
	Click the vendor name to open the vendor record.
Amount	This column displays the vendor bill amount in the project's primary currency.
Invoiced Amount	This column displays the amount invoiced to the customer in the project's primary currency. **Note:** Only the amounts from billable items and expenses are included in the computation.
Status	This column displays the status of the vendor bill.
Project Tasks	This column displays the project tasks associated with the vendor bill. Only a maximum of 300 characters or around ten project tasks can be displayed in this column. You can view all project tasks in the **Schedule** subtab of the project record. **Note:** This column is only available when the Job Costing and Project Budgeting feature is enabled.
Customer Invoices	This column displays the customer invoices created for billable items and expenses in the vendor bill. Only a maximum of 300 characters or around ten customer invoices can be displayed in this column. You can view all customer invoices in the **Related Records** subtab of the project record.

Viewing Purchase Orders and Vendor Bills Entered for a Project Task

You can view purchase orders and vendor bills entered for a project task from the project task record. Only purchase orders and vendor bills that are associated with the project where the project task belongs are displayed. For more information, see Associating Purchase Orders and Vendor Bills to a Project or Project Task.

To view purchase orders and vendor bills entered for a project task:

1. Go to Lists > Relationships > Projects.
2. Click **View** next to the project with the project task you want to view.
3. On the **Schedule** subtab, click the project task name.
4. On the project task record, click the **Procurement** subtab.
5. Click the **Purchase Orders** subtab to display the purchase orders entered for the project task.

   The **Purchase Orders** subtab contains a table with the following information:

Column	Description
Edit | View	Click **Edit** to open the purchase order in edit mode. Click **View** to open the purchase order in view mode.
Date	This column displays the purchase order date.
PO #	This column displays the purchase order number.
Vendor	This column displays the vendor name in the purchase order. Click the vendor name to open the vendor record.

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Column	Description
Amount	This column displays the purchase order amount in the project's primary currency. **Note:** The amount shown does not include taxes. Open the transaction record to see the full transaction amount, including taxes.
Status	This column displays the status of the purchase order.
Receive By	This column displays the date when the items in the purchase order are needed. The value is from the **Receive By** date field in the purchase order form.

6. Click the **Vendor Bills** subtab to display the vendor bills entered for the project task.

   The **Vendor Bills** subtab contains a table with the following information:

Column	Description
Date	This column displays the vendor bill date.
Transaction Number	This column displays the vendor bill transaction number. Click the transaction number to open the vendor bill record.
PO #	This column displays the purchase order number of purchase orders related to the vendor bill. Only a maximum of 300 characters or around ten purchase orders can be displayed in this column. You can view all purchase orders in the **Related Records** subtab of the of the vendor bill record or project record.
Vendor	This column displays the vendor name in the vendor bill. Click the vendor name to open the vendor record.
Amount	This column displays the vendor bill amount in the project's primary currency. **Note:** The amount shown does not include taxes. Open the transaction record to see the full transaction amount, including taxes.
Status	This column displays the status of the vendor bill.

Best Practices in Using the Purchase to Project SuiteApp

Area	Best Practice
Tagging a vendor as a project vendor	Always use the vendor form to create a new vendor record and to tag the vendor as a project vendor. Do not use the **New** button in the purchase order form to create and tag a vendor as a project vendor. The project vendor is not recognized as a vendor when it is added this way. Tagging a vendor as a project vendor lets you identify vendors that provide goods and services that are specific for projects and project tasks. For instructions, see Tagging a Vendor as a Project Vendor.
Setting the default purchase order form for other Purchase to Project SuiteApp roles	The **Custom Purchase Order - Projects** custom form is the default purchase order form for consultant roles that use this SuiteApp. An administrator must set this custom form as

Area	Best Practice
	the default purchase order form for other roles that use this SuiteApp. For information on setting a default form for a role, see the help topic Defining Preferred Forms.
CSV import	When using CSV Import, set the **Run Server SuiteScript and Trigger Workflows** preference in two places so existing records are displayed when you use this SuiteApp. 1. Go to Setup > Import/Export > CSV Import Preferences and check the **Run Server SuiteScript and Trigger Workflows** box. 2. Go to Setup > Import/Export > Import CSV Records. In the Import Options of the Import Assistant, check the **Run Server SuiteScript and Trigger Workflows** box. You must set the preference in both the CSV Import Preferences and Import Options pages.
Creating purchase orders using CSV import	During mapping of values, manually enter the same value for the **Vendor** and **Project Vendor** fields. This prevents errors when using this SuiteApp.
Creating purchase orders using SuiteScript	For users that have the **Custom Purchase Order - Projects** form set as the default purchase order form, populate both the **Vendor** and **Project Vendor** fields with the same value. This prevents errors when using this SuiteApp.
Entering customer invoices	When entering customer invoices, you must select a project in the **Project** field. This is to establish connection to the project and to display the customer invoices in the **Procurement** subtab of the project record. **Note:** Only customer invoices created for billable items and expenses are displayed in the **Procurement** subtab of the project record.
Entering purchase orders and vendor bills for a project or project task	When entering purchase orders and vendor bills for a project, you must associate the items and expenses in the purchase order or vendor bill to a project. This is to establish connection to the project and to display the purchase orders and vendor bills in the **Procurement** subtab of the project record. For more information, see Associating Purchase Orders and Vendor Bills to a Project or Project Task.
	When entering purchase orders and vendor bills for a project task, you must associate the items and expenses in the purchase order or vendor bill to a project task. This is to establish connection to the project task and to display the purchase orders and vendor bills in the **Procurement** subtab of the project task record. For more information, see Associating Purchase Orders and Vendor Bills to a Project or Project Task.

Limitations in Using the Purchase to Project SuiteApp

Area	Limitation
Incompatibility with Full Multi-Book Accounting features	The SuiteApp is incompatible with accounts that use Full Multi-Book Accounting features. In some cases, the amounts might show incorrect values if any of the following Accounting features are enabled: - Adjustment Only Books - Full Multi-Book Accounting* - Chart of Accounts Mapping* - Foreign Currency Management* - Revenue and Expense Management*

Area	Limitation
	■ Extended Accounting Period Close Process * NetSuite Professional Services must implement these features. For more information, see the help topic Enabling Multi-Book Accounting Features.
Validations for users who do not have a consultant or project manager role and for users who do not have access to project records	Validations and checks for this SuiteApp are non-existent for users that do not have a consultant or project manager role. Validations and checks for this SuiteApp are also non-existent for users who do not have access to project records. These users can proceed with the following actions that are not allowed for this SuiteApp: ■ When creating a purchase order: □ Select a customer that references a project which does not allow purchase orders. □ Select a non-project vendor in the **Vendor** field for items and expenses that reference a project or project task. □ Leave the **Expected Receipt Date** blank for items that reference a project or project task. □ Enter an **Expected Receipt Date** that is earlier than the **Start Date** or later than the **End Date** of the project or project task. ■ When creating vendor bills, save a vendor bill entered for a project even when the project does not allow vendor bills.
Tagging a vendor as a project vendor	Do not use the **New** button in the purchase order form to create a new vendor and to tag it as a project vendor. The project vendor is not recognized as a vendor when it is added this way.
Tagging a vendor as a project vendor for some SuiteSuccess editions	The **Project Vendor** box is only available in the standard vendor form. It may not be available for some SuiteSuccess editions that have other default vendor forms. You or your administrator may need to customize the vendor form to add the **Project Vendor** box.
Custom purchase order form for Purchase to Project SuiteApp	When a purchase order is created using the **Custom Purchase Order - Projects** form, the **Make Copy** item in the **Actions** list is disabled by default.
Custom purchase order form for some SuiteSuccess Editions	There is no **Expected Receipt Date** column in the custom purchase order form for some SuiteSuccess Editions. No validation occurs even when the **Expected Receipt Date** column entry is mandatory for items in a purchase order when using this SuiteApp.
Number of displayed purchase orders, project tasks, and customer invoices in the **Procurement** subtab.	In the **Procurement** subtab of the project record, only a maximum 300 characters or around ten purchase orders, project tasks, or customer invoices can be displayed. You can view all purchase orders, project tasks, and customer invoices in the **Related Records** subtab of the vendor bill record or project record.