

## Project Stages

Jennifer M - 2023-05-05 - Projects & Presentation

Every project has three main stages:

### Stage 1: Negotiating & Pitching

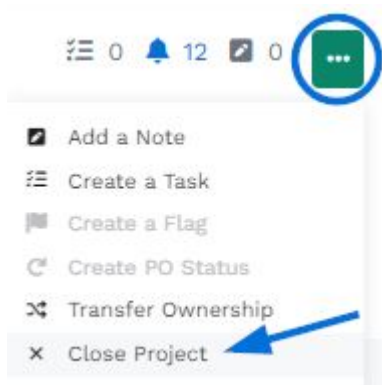
During this stage, the project will contain a presentation and/or a quote.

### Stage 2: Processing & Fulfillment

Once an order is created, either directly via the Create Order button in the Overview tab or by converting a quote to an order in the Quotes/Orders/Invoices tab, the project will move into this stage. The project will remain in this stage until a conclusion is indicated.

### Stage 3: Closed

When a project has reached its conclusion, click on the three dot icon and select Close Project.



In the Close Project window, use the Project Resolution dropdown to select the appropriate option for this project. You can also use the Note box to enter any pertinent information regarding this closure of this project. When you are finished, click on the Close Project button.

## Close Project

Closing a project

### Note

### Project Resolution

× Cancel

Close Project

The project will now be shown in the third and final stage: Closed.