Tidy Academy

PROJECTS

Tidy Enterprise

How to add project adjustments to a project

OVERVIEW

In this module, learn how to add project adjustments to projects. These adjustments can be used to document 'variations' in the project that occur after the project has started, that were not taken into account in the original plan.
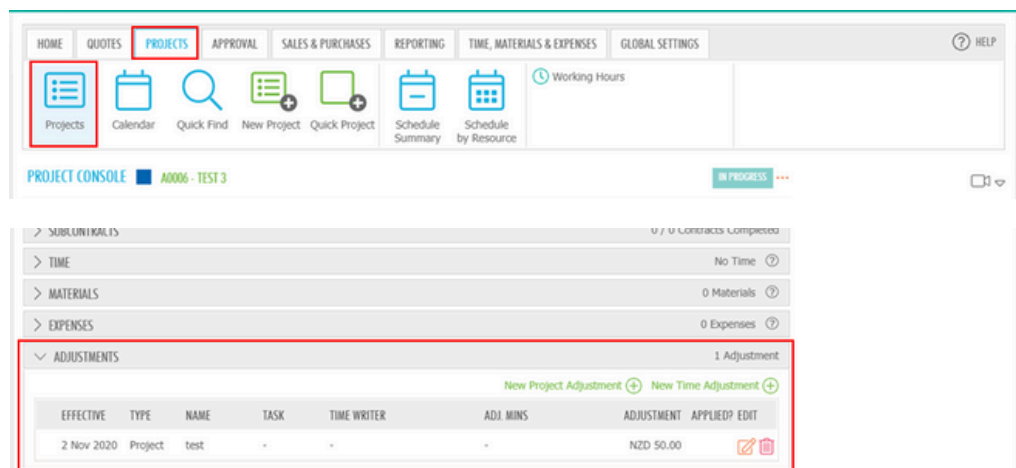
STEPS

Go to **Projects** under **Projects**. Select a project and expand the **Adjustments** section.

Click **New Project Adjustment**. Each adjustment is composed of one or more line items. A given adjustment represents either a **discount** or **markup** to the project cost.

The **green check marks** indicate whether the adjustment has been **applied** to an invoice or not. An adjustment becomes **eligible** for invoicing when its date falls into the **invoice date range**, and if a discount its value does not exceed the total of the other invoiceable items (TidyEnterprise does not currently manage credit notes).

Project Adjustments are taken into account in the both the **Actual** and **Actual Details** sections in the console Financials section. They do not show within the **Planned Details** section as there is no mechanism for **planning an adjustment**, only applying an **Actual adjustment**.

ACTUAL									
COST:	$0.00	REVENUE:	$50.00	INVOICED:	$0.00	INVOICABLE:	$50.00	PROFIT:	$50.00

∨ More details

PLANNED - DETAILS	TIME	MATERIALS	EXPENSES	MARKUP	TOTAL
REVENUE	$0.00	$0.00	$0.00	0.00 %	$0.00
COST	$0.00	$0.00	$0.00		$0.00
				PROFIT:	$0.00

ACTUAL - DETAILS	TIME	MATERIALS	EXPENSES	ADJUSTMENTS	MARKUP	TOTAL
REVENUE	$0.00	$0.00	$0.00	$50.00	45.00 %	$50.00
COST	$0.00	$0.00	$0.00			$0.00
					PROFIT:	$50.00
					VARIANCE:	$50.00

Adjustments are totaled as a NET amount In the **Actual Details** section under the **Adjustments** heading. This is a **total** of all the (negative and positive) adjustments applied to the project.

The NET adjustment amount is then included in the **Total Revenue figure**.

ACTUAL - DETAILS	TIME	MATERIALS	EXPENSES	ADJUSTMENTS	MARKUP	TOTAL
REVENUE	$0.00	$0.00	$0.00	$50.00	45.00 %	$50.00
COST	$0.00	$0.00	$0.00			$0.00
					PROFIT:	$50.00
					VARIANCE:	$50.00

Adjustments that have **not been invoiced** so are not marked as **Applied** are included in the **Invoiceable total** in the **Actual** section.

Adjustments that have been **invoiced** and are marked as **Applied** are included in the **Invoiced total** in the **Actual** section.

INVOICED:	$0.00	INVOICABLE:	$50.00

Project adjustments are also included in the same way in the **relevant reports** for specific projects and **available for invoicing**.

Adjustments can be **invoiced on their own**, (no other items are required on the invoice) or **invoiced along with Time, Materials and/or Expenses** and other Adjustments.

Adjustments will always display as a **quantity of 1**, regardless of how many child items are within the discount.

There are four levels of **detail** for Adjustments to show on an invoice, as follows:
- **Basic** - Totaled as 'Adjustments', Total Charge shows Net amount of all adjustments on the project, quantity of one, no name or description details.
- **Summary** - Shows with a preceding tag of either 'Discount' or 'Surcharge' then the top level 'Name', quantity of one and Total Charge.
- **Detailed By Task** - Shows same as Summary.
- **Detailed By Activity** - Shows same as Summary.

If there is only a **negative adjustment** available for invoicing on the project, an invoice will **be unavailable.**

If a **negative adjustment** (discount) will make an invoice a **negative amount**, it is **not included** on the invoice. It will be re-included when the **total amount** becomes **positive.**