

# Adding and Removing Projects in Acumatica

**Date:** 12 MAR 2025  
**Version #:** 02

**DOC #:** SFS-06  
**Owner:** Jordan Hollingsworth

All requests for adding and removing projects must be routed through the Lead Advisor as follows are the steps below. This will ensure continuity between all regions as to how projects are added and removed.

## 1. Add a Project to Acumatica

### 1.1. Regional Advisor Responsibilities

Collect the following information (this information can be provided from the Project Manager):

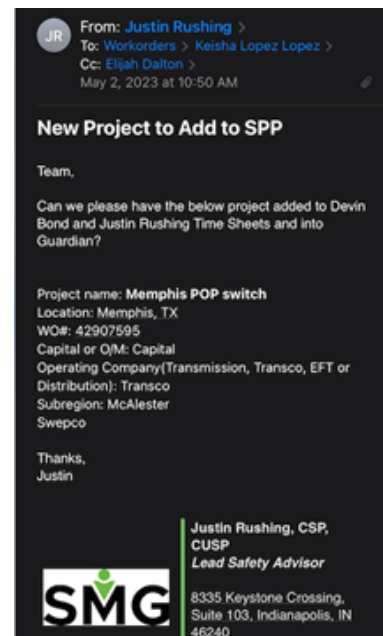
- WO Name and Number (Work Orders can be searched through Citrix > Microsoft Edge > URL is “findwoproj”)
- City
- State
- Operating Company: Transmission, Transco, Distribution, or ETT
  - If located in Texas: SWEPCO, Central or North

Forward this information to your Lead Safety Advisor to acknowledge this project needs to be added into Acumatica.

### 1.2. Lead Advisor Responsibilities

Send an email to [workorder@safetymanagementgroup.com](mailto:workorder@safetymanagementgroup.com) and the appropriate Regional Advisor to add the project into Acumatica. CC Theresa Johns & the appropriate Regional Advisor.

NOTE: Send request to [workorder@safetymanagementgroup.com](mailto:workorder@safetymanagementgroup.com) in a timely manner. Please don't send requests on weekends, or Monday when trying to complete your time sheet.



## 2. Remove a Project to Acumatica

### 1.3. Regional Advisor Responsibilities

Once the advisor is no longer performing routine visits on a project, they should:

1. Reach out to the Project Manager to ensure the job is completed
2. Inform their Lead Advisor to remove this project from Acumatica
3. Ensure the Safety Advisor Project Spreadsheets are updated and present accurate information.

### 1.4. Lead Advisor Responsibilities

Once the project is given the “OK” from the Project Manager to be removed, the lead should reach out to [workorder@safetymanagementgroup.com](mailto:workorder@safetymanagementgroup.com) to remove this project from Acumatica. CC Theresa Johns & the appropriate Regional Advisor.

There is approximately a 45-day delay for invoicing before a project can be removed from Acumatica. The project may remain on the advisor’s job list for this time before being removed.