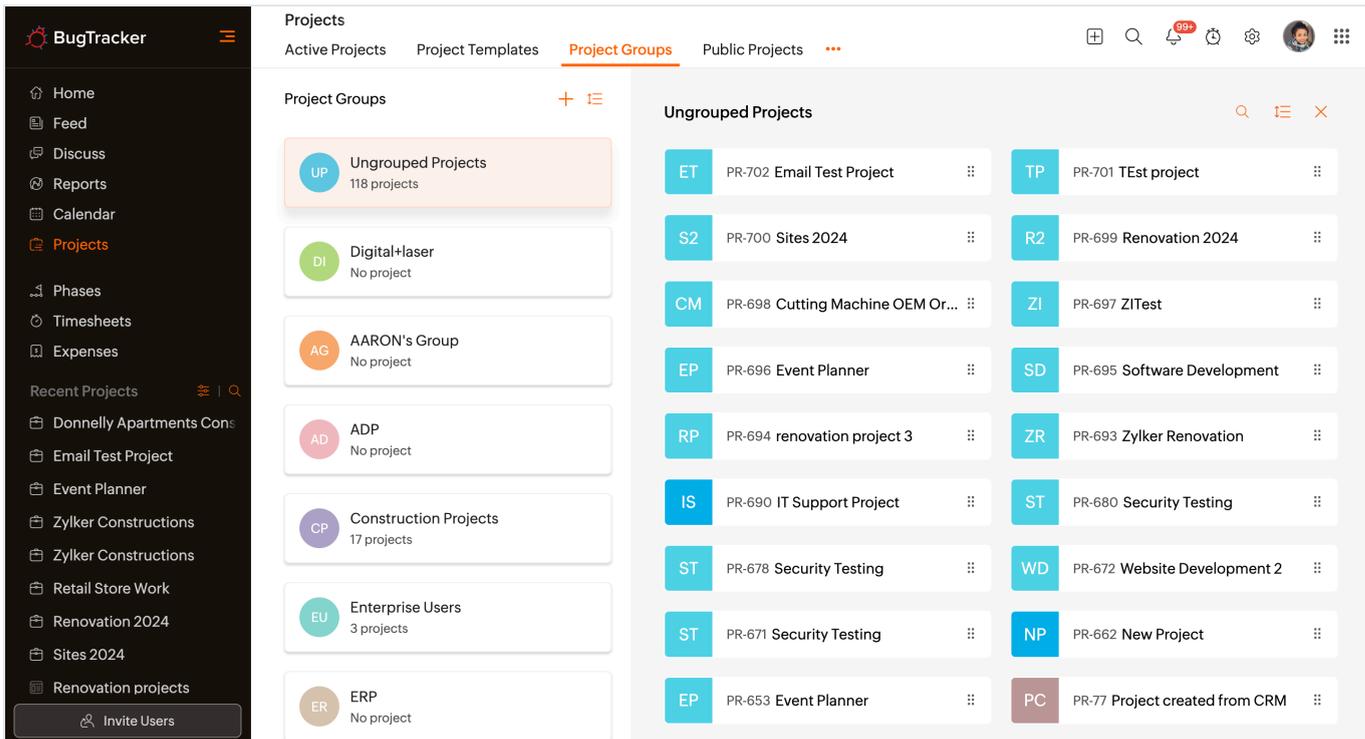




Project Groups

You can group projects based on criteria, requirements, clients, users and various other project needs. By grouping projects, you can segregate multiple projects and efficiently manage your project groups.



For instance, if you're working in a company that runs projects across departments like finance, invoices, and accounts. Selecting the projects in a particular category can be daunting, you may go baffled at times. To reduce the cumbersome process, you can group projects under similar category and fetch them when required. Now, you can group all the project related to finance, budget, accounts, price under Accounts. Project Groups will help you do this in a jiffy.

Benefits:

- Sort projects into categories
- Filter projects by groups
- Create project group prefix

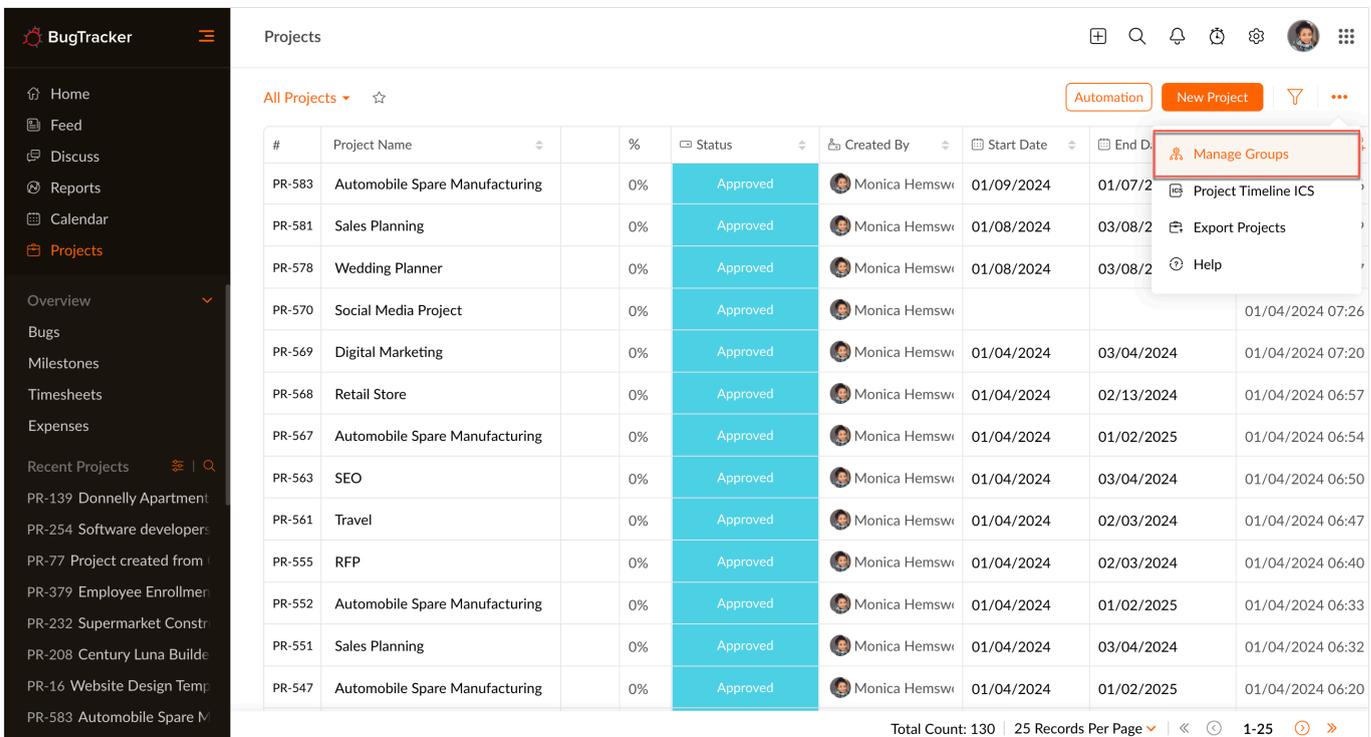
[Click to learn more about access privileges for managing groups.](#)

Create a Project Group

Create a new project group based on your business requirements.

1. Click on the Projects tab in the left panel and click **☰** in the upper-right corner.
2. Select **Manage Groups**.
3. Click + icon to create a group.
4. Enter the group name for the projects that you want to group together in the Group Name.
5. Click **Create Group** to create a project group.

You can create multiple project groups or associate multiple projects to a single project group.



The screenshot displays the BugTracker interface. On the left is a dark sidebar with navigation options: Home, Feed, Discuss, Reports, Calendar, Projects, Overview, Bugs, Milestones, Timesheets, Expenses, and Recent Projects. The main area is titled 'Projects' and shows a table of project records. A dropdown menu is open over the table, with 'Manage Groups' highlighted. The table has columns for #, Project Name, %, Status, Created By, Start Date, End Date, and a time column. The records listed are:

#	Project Name	%	Status	Created By	Start Date	End Date	
PR-583	Automobile Spare Manufacturing	0%	Approved	Monica Hemswo	01/09/2024	01/07/2025	
PR-581	Sales Planning	0%	Approved	Monica Hemswo	01/08/2024	03/08/2024	
PR-578	Wedding Planner	0%	Approved	Monica Hemswo	01/08/2024	03/08/2024	
PR-570	Social Media Project	0%	Approved	Monica Hemswo			01/04/2024 07:26
PR-569	Digital Marketing	0%	Approved	Monica Hemswo	01/04/2024	03/04/2024	01/04/2024 07:20
PR-568	Retail Store	0%	Approved	Monica Hemswo	01/04/2024	02/13/2024	01/04/2024 06:57
PR-567	Automobile Spare Manufacturing	0%	Approved	Monica Hemswo	01/04/2024	01/02/2025	01/04/2024 06:54
PR-563	SEO	0%	Approved	Monica Hemswo	01/04/2024	03/04/2024	01/04/2024 06:50
PR-561	Travel	0%	Approved	Monica Hemswo	01/04/2024	02/03/2024	01/04/2024 06:47
PR-555	RFP	0%	Approved	Monica Hemswo	01/04/2024	02/03/2024	01/04/2024 06:40
PR-552	Automobile Spare Manufacturing	0%	Approved	Monica Hemswo	01/04/2024	01/02/2025	01/04/2024 06:33
PR-551	Sales Planning	0%	Approved	Monica Hemswo	01/04/2024	03/04/2024	01/04/2024 06:32
PR-547	Automobile Spare Manufacturing	0%	Approved	Monica Hemswo	01/04/2024	01/02/2025	01/04/2024 06:20

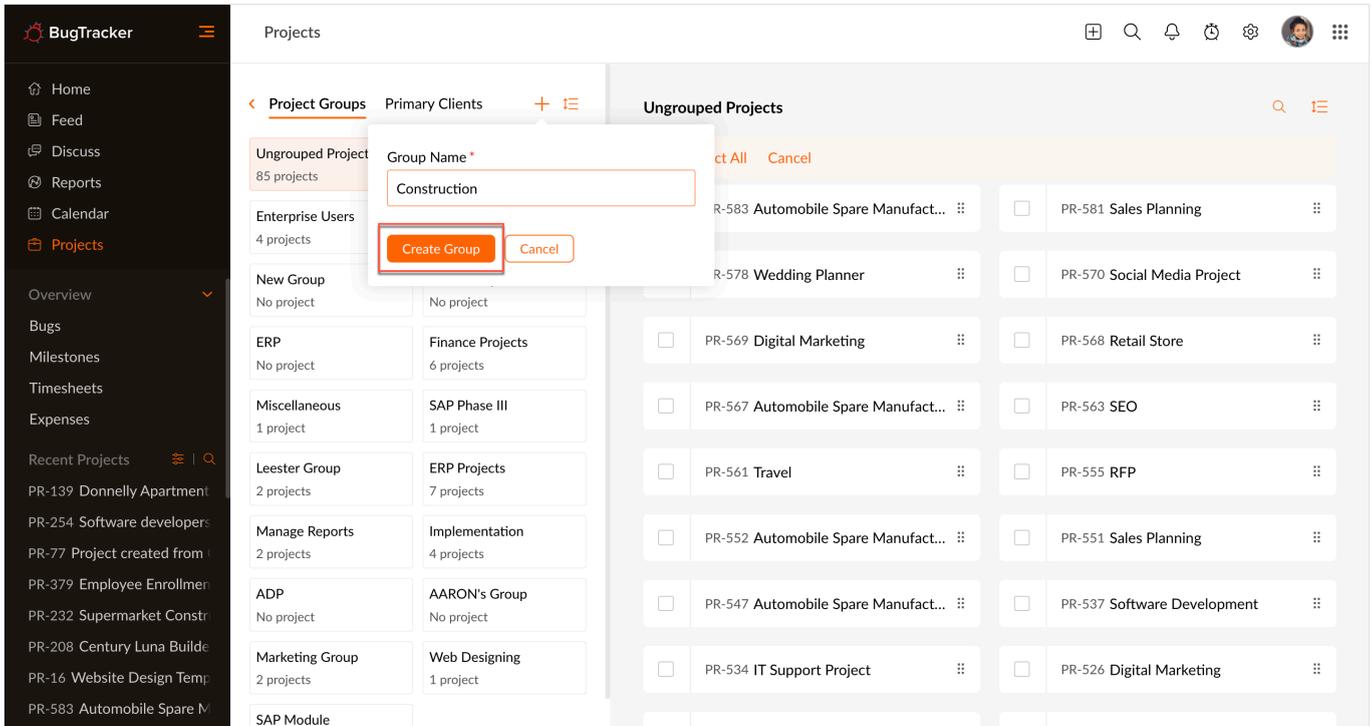
At the bottom of the table, it says 'Total Count: 130 | 25 Records Per Page | 1-25'.

Project Group Prefix

Project groups can be assigned a prefix. The prefix is appended to all projects that are part of the group. Enable this [setting](#) to create or modify project group prefix.

1. Click on the Projects tab in the left panel and click **☰** in the upper-right corner.
2. Select **Manage Groups**.
3. Click + icon to create a group.

4. Enter the group name.



5. Click **Create Group**.



- The project group prefix cannot be more than 10 characters and can contain alphabets, numbers, & hyphen only.
- The group prefix is appended to the project when user selects a group while [creating a project](#).
- For existing project groups, the project prefix is prefilled in the group prefix section when you click the edit option and can be modified.
- If a project is moved to a new group, it will take the prefix from the new group.

Manage Project Groups

After creating a project group, you can effectively organize and manage the groups according to your preferences. All the actions are right within the groups to get your work done on time.

1. Hover over the required project group and click  to edit the project group.
2. Hover over the required project group and click  to remove the project group.
3. Click  to enable reorder of project groups. Click reorder icon () next to the group and drag and drop it to its new place. Click **Save Order** to save the project group order.
4. Click a project group and view the list of projects associated with the project group.
5. Search for projects using *Project Search* in the upper-right corner of the *Active Projects*. However, it is case-sensitive.

 However, any projects associated with the project group will not be deleted instead, they will be moved into Active Projects. A warning message is displayed, when you delete a project group. Click **Ok** to delete.

Create a New Project and Associate a Project Group

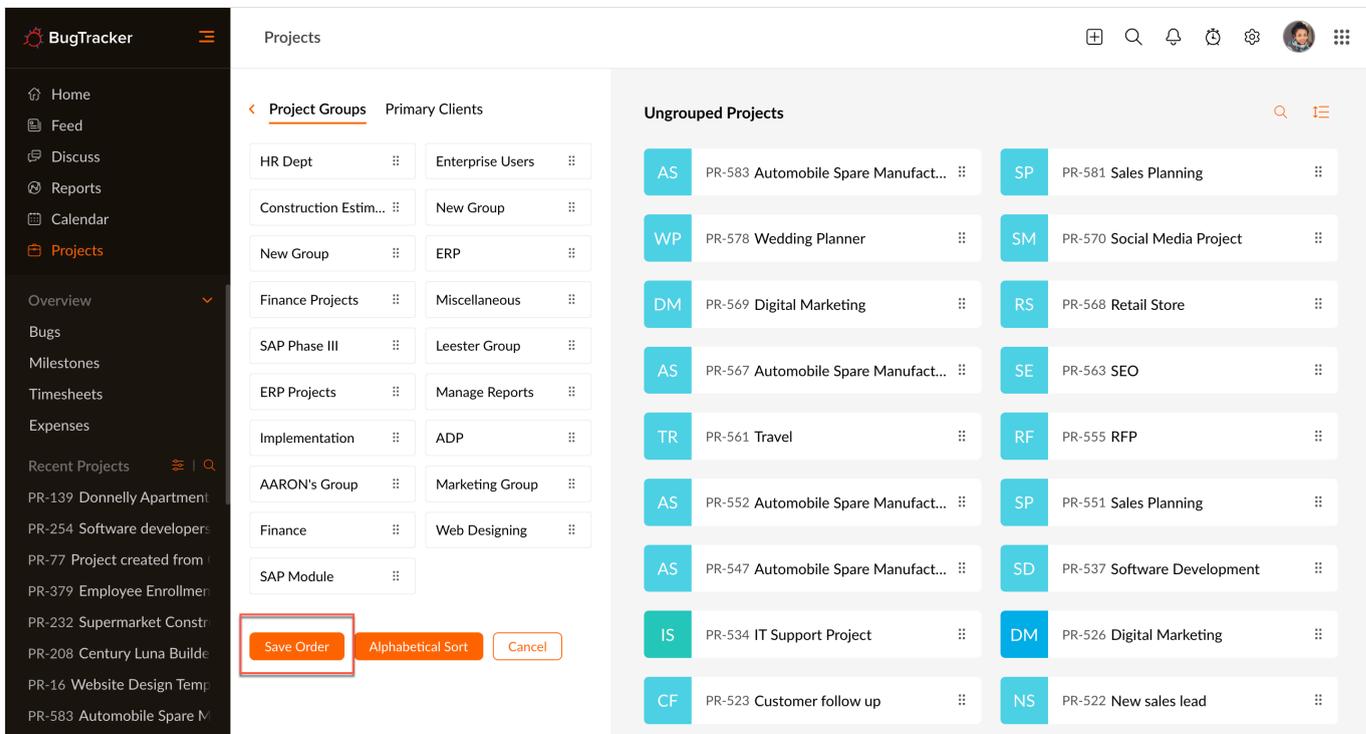
Create a new project and associate it with a project group.

1. Click **New Project** in the upper-right corner in Projects.
2. Enter the **Project Name**.
3. Select the **Project Owner** in *Owner* field.
4. Select a project template in *Choose a Template* field.
 - If you create a project from an existing project template, the Project Start Date option is enabled.
5. Select a start date for the project in *Project Start Date* field.
6. Enter a brief summary about your project in *Project Overview* field.
 - Select the *Show this project overview by default* checkbox, if you wish to display the project overview summary in the project Dashboard.
7. Select the budget option to estimate project in *Project Budget*. Projects can be estimated *Based on Amount* or *Based on Hours*.
8. Select a project group in *Group Name* to associate the project.
 - If required, hover over the *Group Name*, and then click **Add new group** to create a new project group.
9. Indicate the privileges to access the project in *Project Access*. [Learn more](#) about public and private projects.
10. Click **Add Project** to create a new project.

- 
- If required, you can also edit the project and modify its Group Name. [Learn more](#) about editing projects.
 - If available, custom fields are populated while creating or editing the projects. [Learn more](#) about custom fields.

Reorder and Alphabetically Sort Projects

Reorder projects within a project group as desired. Click the desired project group and then click the  icon to reorder the projects. You can also alphabetically sort the projects by clicking the reorder () icon and selecting the **Alphabetical Sort** button. Now, select **Save Order** to save the list.



Remove Project From a Group

1. Click the desired project group to view its associated projects.
2. Drag and drop the projects into Ungrouped Projects section.

To remove a single project, you can hover over the project and select  right next to the project to remove only that project from its project group.

Associate a Project to a Client Group

1. Click the **Primary Client** tab to view all client groups.
2. Drag and drop the ungrouped projects into the desired client group.

Projects that are not associated with any client group are available in Active Projects group.

Primary Clients

Primary clients are the client companies that are associated with the project groups.

1. Click **Primary Clients** > **Unassociated** to view the list of projects that currently have no primary client assigned.
2. Select either specific projects or choose **Select All**, and then click  to drag and drop to associate the selected projects with the Primary Clients.

More Reads

[Back to help](#)

[Public Projects](#)

[Project Dashboard](#)

[Project Custom View](#)

[Projects List View](#)