Master Data

Documentation · https://viaspaces.com/Documentation/master_data/

Reusable Projects and Items that keep your documents consistent.

Master Data is where you store the things you reuse across many documents — Projects to group related work, and Items to sell or bill the same product or service without retyping it every time.

Projects

A Project is a reusable record with its own status and date range. Attach documents to a Project to track everything tied to a specific engagement, like a renovation or a consulting assignment, and filter your Dashboard by it later.

Open **Master Data, Projects** and click **Add New Project** to create one. You'll set a Name, Code / ID, Description, Status (for example Draft or Execution), a Start and End Date, and optional Category and Subcategory fields.

The Projects table shows Name, Code / ID, and Status by default; use the gear icon to add Start Date, End Date, Description, Category, or Subcategory as columns, or reset to the default view.

Items

An Item is a reusable product or service record with its own price and identification data, so you can pull it straight into a document instead of entering the details again.

Open **Master Data, Items** and click **Add New Item** to create one. Only the Name is required — everything else (Code / ID, Description, Unit of Measurement, Currency, Unit Price, Manufacturer,

Brand, Category, Subcategory, EAN-13 / UPC / GTIN / Part Number, and Tax Rate) is optional.



Hint: Only active Items show up as line items in the Document Editor, so your dropdown always reflects what you currently sell.

Managing your lists

Both the Projects and Items lists are searchable by name, paginated, and support view, edit, and delete on each row. Projects also offer bulk actions through row checkboxes and the Actions menu.