SALESFORCE PROJECT MODULE

"How, What, When?" manual

Process Flow before Project is being created

- Customer confirms quote
- SA (Sales admin) creates SO (Sales Order) in Nav.
- SO is integrated to SFDC
- From SFDC, SA creates Project Detail Form
- SA creates JO (Job Order) in Nav
- JO is integrated to SFDC

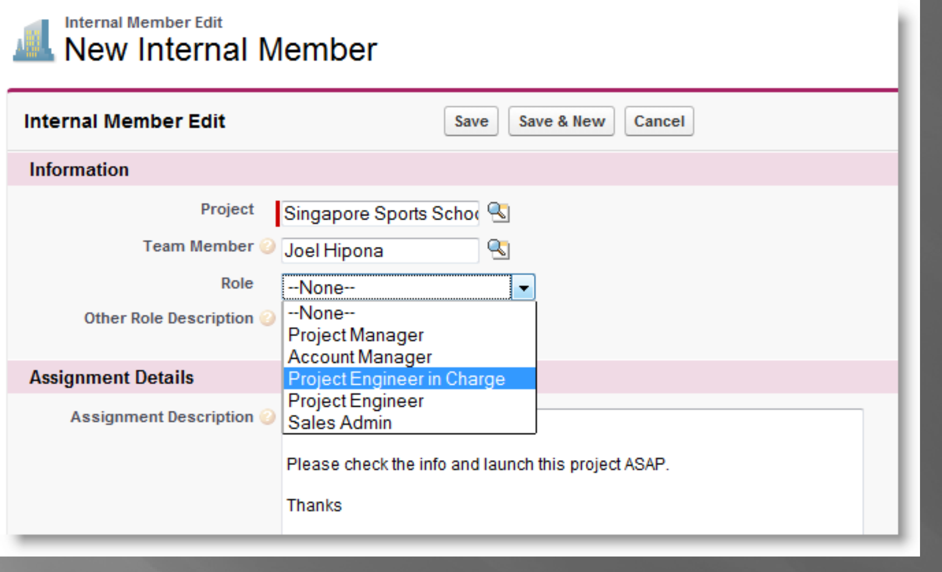
- Project Detail form is sent to Peter & Jeff to approve via email alert, once SA clicks “submit for approval”.
- Peter & Jeff will fill in subcon costs if applicable & assign engineer & click “submit for approval”.
- Form is then sent to Amela for finance approval (checking of subcon fees margin)
- Once approved, project is created.

- Project Owner is able to read Oppty details from project page

- All info in project is auto-populated from SFDC Quotation & JO.

- If there are credit terms in the quote which calls for downpayment eg. 100% DP, 30% DP, once project is created, an email notification will be sent to Finance to invoice downpayment.

- To include another member into project team Eg. RWS has 3 members in the team.



When saved, an email notification is sent to new member and write access is granted.

- **External Members** section is populated by the info from Important Client Information on Project Details Form
- New members can be added by clicking **New External Member**
- External Members must exist as Contact in the system
- If not, SA can add as contacts in system first.

External Members New External Member External Members Help ?

Action	Role	Member Contact	Company Name	Email	Phone	Mobile	Other Role Description
Edit | Del	Client Project Manager	Seepu Ning	MONSANTO BEIJING REPRESENTATIVE OFFICE	syhan34@gmail.com	6264 3394		
Edit | Del	Client Only	Joey Lim	MONSANTO BEIJING REPRESENTATIVE OFFICE	syhan34@gmail.com	6264 3394	9555 0505	
Edit | Del	End-User	Joey Lim	MONSANTO BEIJING REPRESENTATIVE OFFICE	syhan34@gmail.com	6264 3394	9555 0505	
Edit | Del	Consultant	Joey Lim	MONSANTO BEIJING REPRESENTATIVE OFFICE	syhan34@gmail.com	6264 3394	9555 0505	

Project Schedule to send to clients:

- Make use of project schedule section, info is populated from Project Details Form.
- New items can also be added by clicking “New Project Task”.
- A Gantt chart can be generated by clicking “Project Task Gantt Chart”.

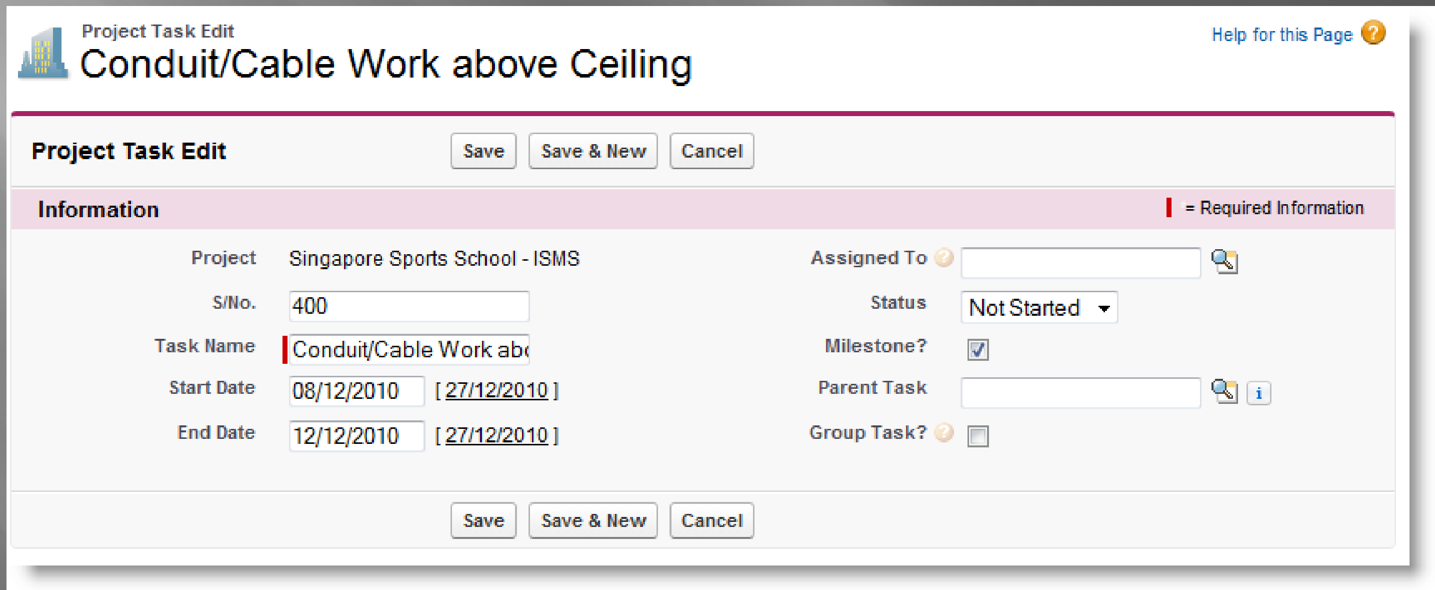
Project Schedule New Project Task | Project Task Gantt Chart — Project Schedule Help ?

Action	Task Name	S/No.	Duration	Start Date	End Date	Milestone?	Status	Assigned To
Edit | Del	Expected Commencement Date	100	1	04/12/2010	04/12/2010	✓	Not Started	
Edit | Del	First Site Meeting	300	2	04/12/2010	05/12/2010	✓	Not Started	Chee Yang Ng
Edit | Del	Conduit/Cable Work above Ceiling	400	10	06/12/2010	15/12/2010	✓	Not Started	
Edit | Del	Task Group 1	500	17	15/12/2010	31/12/2010	✓	Not Started	
Edit | Del	Task 1a	600	6	15/12/2010	20/12/2010		Not Started	
Edit | Del	Task 1b	700	12	20/12/2010	31/12/2010		Not Started	
Edit | Del	Expected Completion Date	2,000	1	31/12/2010	31/12/2010	✓	Not Started	

How to change project task

In the New Project Task screen, you enter:

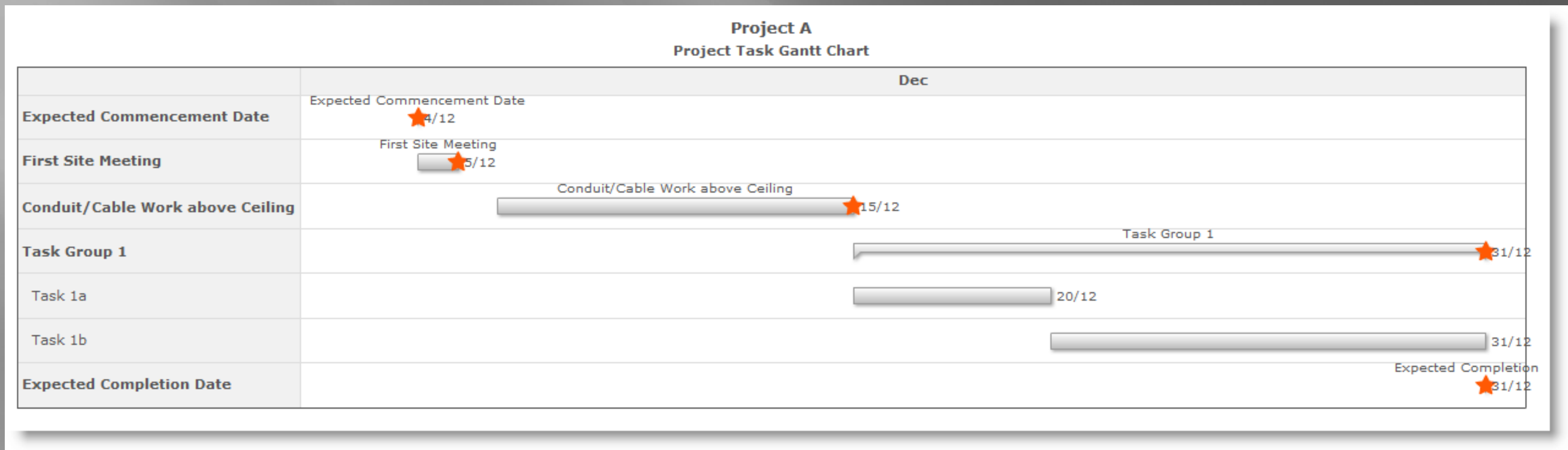
- S/No.: A serial number used for sorting
- Task Name, Start Date, End Date
- Milestone?: When checked, a red star is displayed in Gantt chart
- Group Task?: When checked, it is displayed as a group task in Gantt chart
- Parent Task: When it is a child task of a group task (parent), specify the parent here



▣ Populated from the Project Schedule list..

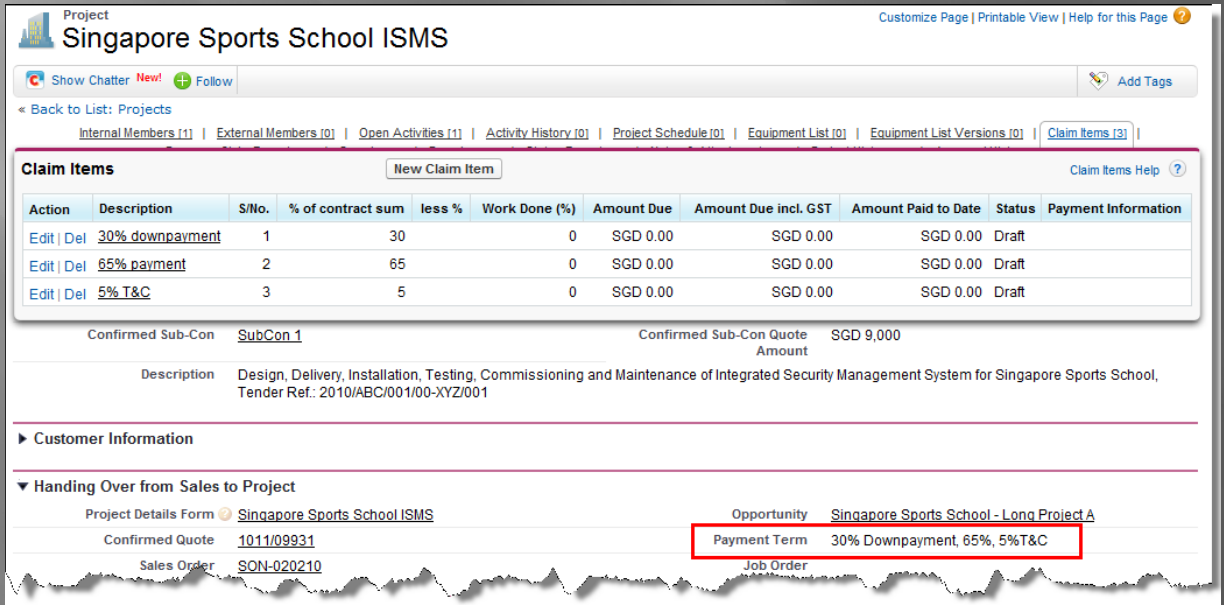
▣ Red star – represents a milestone

Project Gantt Chart:



Progress Claims/ Downpayments for invoicing purposes

- At project creation, **Claim Items** section is populated automatically, if the associated Quotation has one of the following credit terms:
  - 30% Downpayment, 65%, 5%T&C
  - 40% Downpayment, 55%, 5%T&C
  - 50% Downpayment, 45%, 5%T&C
  - 70% Downpayment, 25%, 5%T&C



Project
Singapore Sports School ISMS

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« Back to List: Projects

Internal Members [1] | External Members [0] | Open Activities [1] | Activity History [0] | Project Schedule [0] | Equipment List [0] | Equipment List Versions [0] | Claim Items [3] |

Claim Items New Claim Item — Claim Items Help

Action	Description	S/No.	% of contract sum	less %	Work Done (%)	Amount Due	Amount Due incl. GST	Amount Paid to Date	Status	Payment Information
Edit | Del	30% downpayment	1	30		0	SGD 0.00	SGD 0.00	SGD 0.00	Draft	
Edit | Del	65% payment	2	65		0	SGD 0.00	SGD 0.00	SGD 0.00	Draft	
Edit | Del	5% T&C	3	5		0	SGD 0.00	SGD 0.00	SGD 0.00	Draft	

Confirmed Sub-Con: SubCon 1 — Confirmed Sub-Con Quote Amount: SGD 9,000

Description: Design, Delivery, Installation, Testing, Commissioning and Maintenance of Integrated Security Management System for Singapore Sports School, Tender Ref.: 2010/ABC/001/00-XYZ/001

▸ Customer Information

▾ Handing Over from Sales to Project

Project Details Form: Singapore Sports School ISMS — Opportunity: Singapore Sports School - Long Project A

Confirmed Quote: 1011/09931 — Payment Term: 30% Downpayment, 65%, 5%T&C

Sales Order: SON-020210 — Job Order

Progress Claims/ Downpayments for invoicing purposes

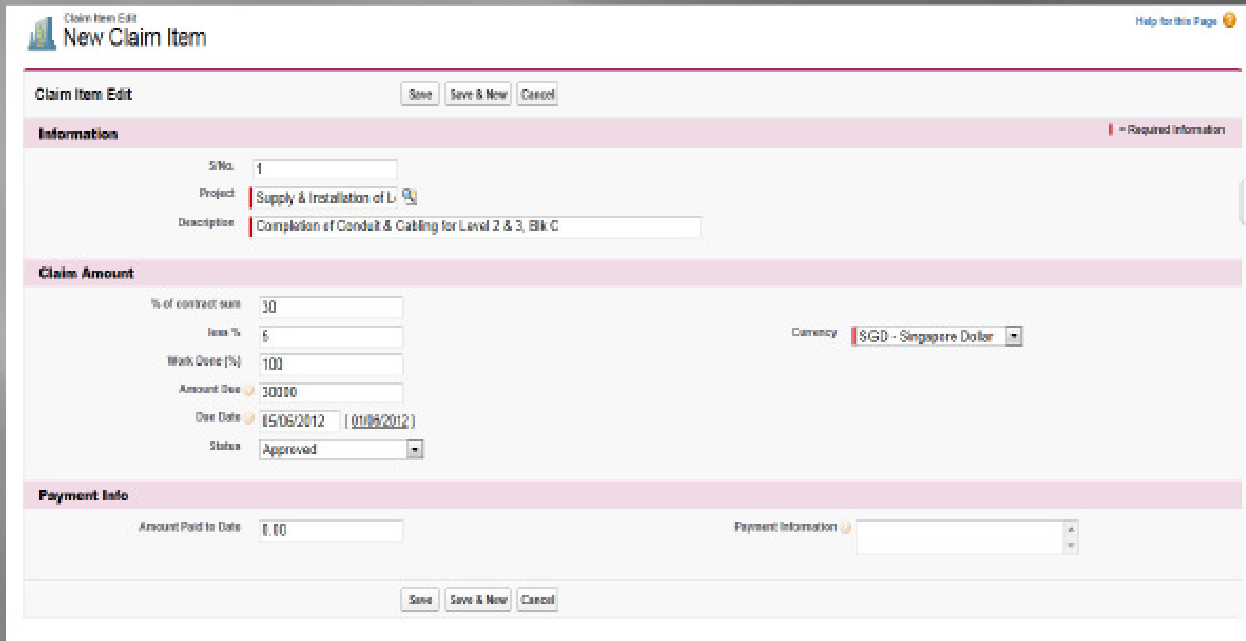
- Credit terms

  (100% downpayment, or 30% downpayment etc)

- System will auto generate email to Finance for billing once Project is created.

Progress Claims for invoicing purposes

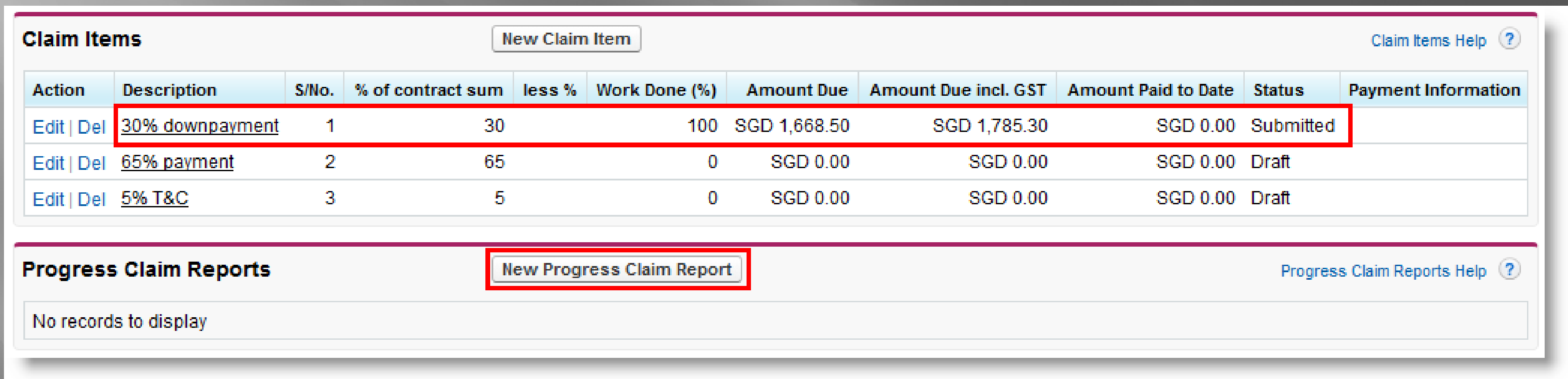
- Credit terms - Progress claim
- As project progresses, project member adds/updates appropriate Claim Item record



- Finance will be notified via email to bill once status is changed to “Approved”.

Progress Claims Report

- Once claim items are updated for a progress claim reports for the client, click the **New Progress Claim Report** button



Claim Items New Claim Item Claim Items Help ?

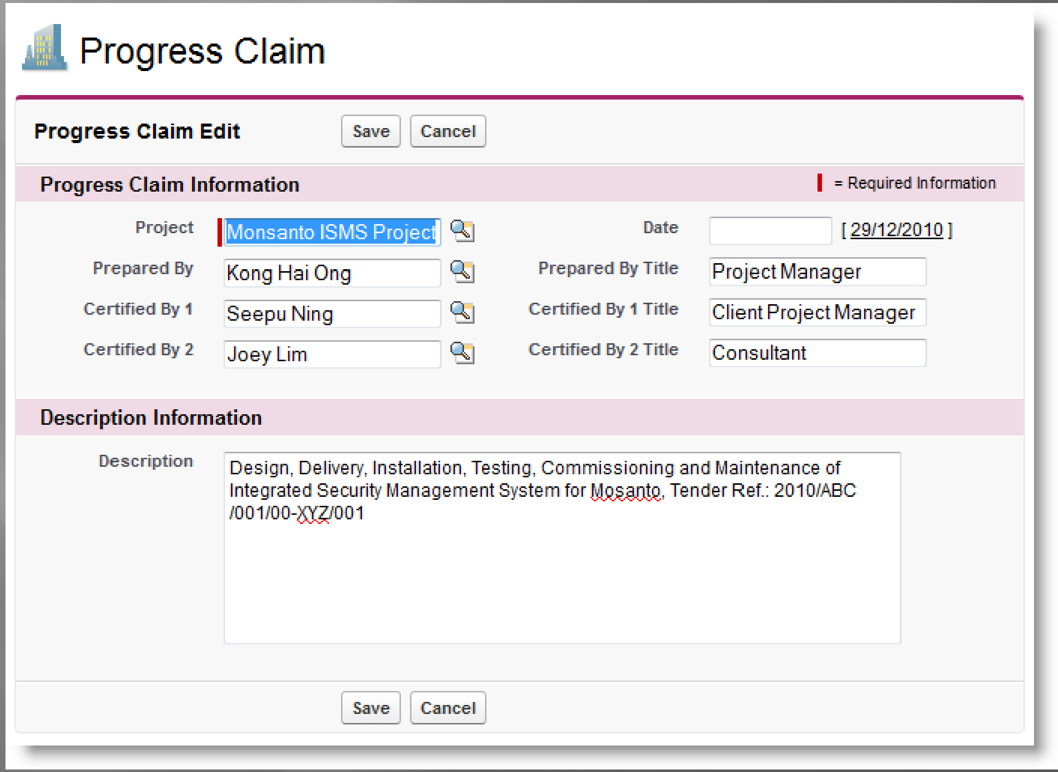
Action	Description	S/No.	% of contract sum	less %	Work Done (%)	Amount Due	Amount Due incl. GST	Amount Paid to Date	Status	Payment Information
Edit | Del	30% downpayment	1	30		100	SGD 1,668.50	SGD 1,785.30	SGD 0.00	Submitted	
Edit | Del	65% payment	2	65		0	SGD 0.00	SGD 0.00	SGD 0.00	Draft	
Edit | Del	5% T&C	3	5		0	SGD 0.00	SGD 0.00	SGD 0.00	Draft	

Progress Claim Reports New Progress Claim Report Progress Claim Reports Help ?

No records to display

Progress Claims Report

- New Progress Claim Report edit page has most fields pre- populated from the info in the project record
- Ensure all information is correct, click Save



Progress Claims Report

- Rest of the info (totals, line items) are also automatically copied from the current Claim Items
- To generate PDF, click the **Print PDF** button

Progress Claim Report Detail Edit | Delete | Clone | Print PDF

Progress Claim No.	PC-0020	Prepared By	Kong Hai Ong
Project	Singapore Sports School - ISMS	Prepared By Title	Project Manager
Date	08/12/2010	Certified By 1	SINFATT LEE
Status	Draft	Certified By 1 Title	Client Project Manager
		Certified By 2	MOHAMMAD FAUZI ANUAR
		Certified By 2 Title	Consultant
Description	Design, Supply, Delivery, Installation, Testing, Commissioning and Maintenance of Integrated Security Management System		
Created By	Joel Hipona, 08/12/2010 23:25	Last Modified By	Joel Hipona, 08/12/2010 23:25

▼ Totals

Contractual Amount	SGD 986.99	Total Amount Claimable	SGD 296.10
GST %	7%	GST Amount	SGD 20.73
		Total Amount Claimable incl. GST	SGD 316.83
Total Amount Paid to Date	SGD 0.00	Total Amount Due	SGD 316.83

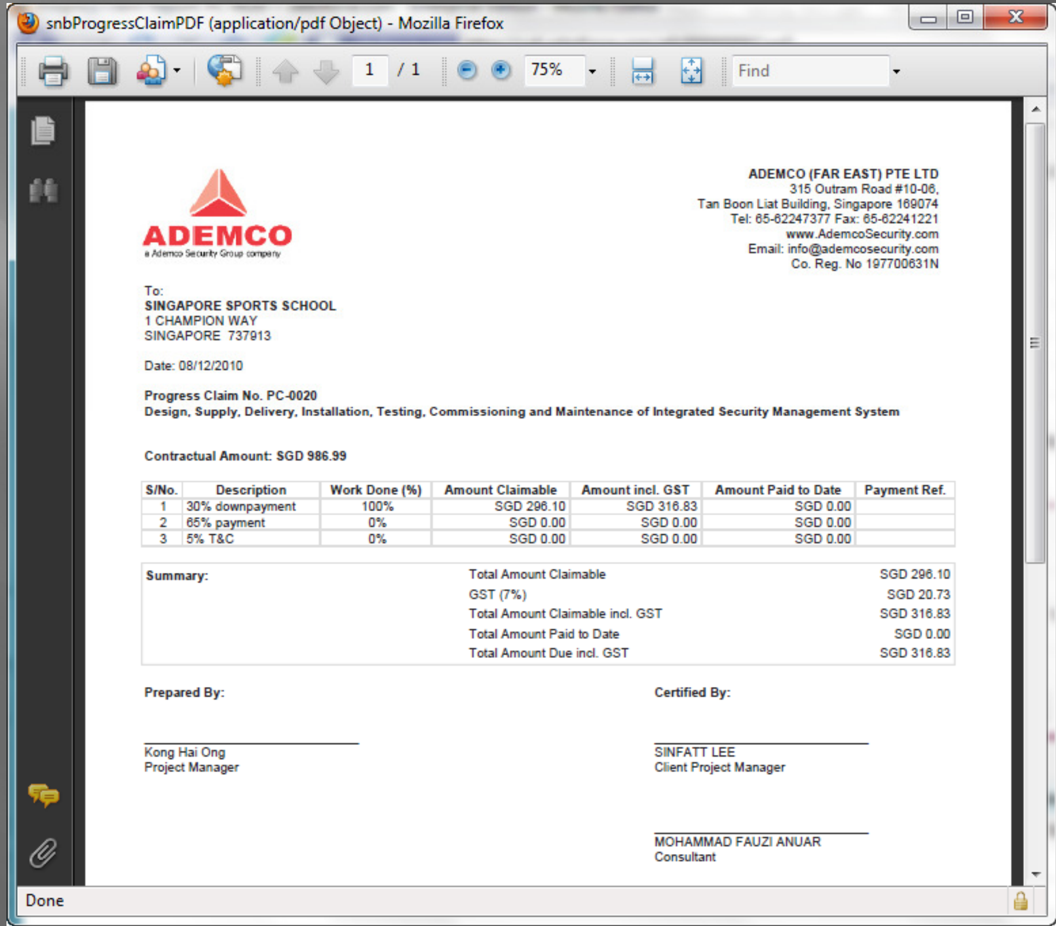
Edit | Delete | Clone | Print PDF

Progress Claim Lines Progress Claim Lines Help ?

Action	Description	S/No.	% of contract sum	less %	Work Done (%)	Amount Due	Amount Due incl. GST	Amount Paid to Date	Payment Information
Edit | Del	30% downpayment	1	30		100	SGD 296.10	SGD 316.83	SGD 0.00	
Edit | Del	65% payment	2	65		0	SGD 0.00	SGD 0.00	SGD 0.00	
Edit | Del	5% T&C	3	5		0	SGD 0.00	SGD 0.00	SGD 0.00	

Progress Claims Report

- Ensure everything is correct, print/send the PDF file, and get signatures
- Save in PDF, send to client via SFDC or email



ADEMCO
a Ademco Security Group company

ADEMCO (FAR EAST) PTE LTD
315 Outram Road #10-06,
Tan Boon Liat Building, Singapore 169074
Tel: 65-62247377 Fax: 65-62241221
www.AdemcoSecurity.com
Email: info@ademcosecurity.com
Co. Reg. No 197700631N

To:
SINGAPORE SPORTS SCHOOL
1 CHAMPION WAY
SINGAPORE 737913

Date: 08/12/2010

Progress Claim No. PC-0020
Design, Supply, Delivery, Installation, Testing, Commissioning and Maintenance of Integrated Security Management System

Contractual Amount: SGD 986.99

S/No.	Description	Work Done (%)	Amount Claimable	Amount incl. GST	Amount Paid to Date	Payment Ref.
1	30% downpayment	100%	SGD 296.10	SGD 316.83	SGD 0.00	
2	65% payment	0%	SGD 0.00	SGD 0.00	SGD 0.00	
3	5% T&C	0%	SGD 0.00	SGD 0.00	SGD 0.00	

Summary:	Total Amount Claimable	SGD 296.10
	GST (7%)	SGD 20.73
	Total Amount Claimable incl. GST	SGD 316.83
	Total Amount Paid to Date	SGD 0.00
	Total Amount Due incl. GST	SGD 316.83

Prepared By:

Kong Hai Ong
Project Manager

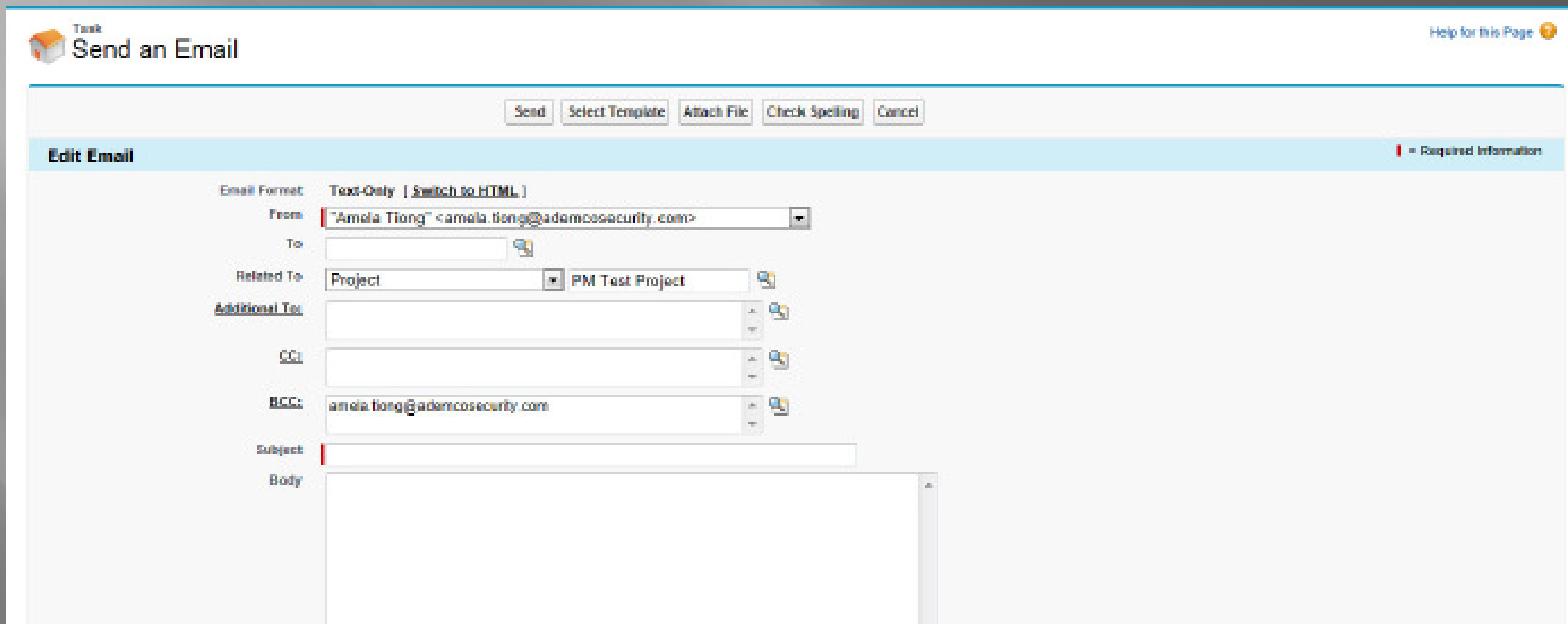
Certified By:

SINFATT LEE
Client Project Manager

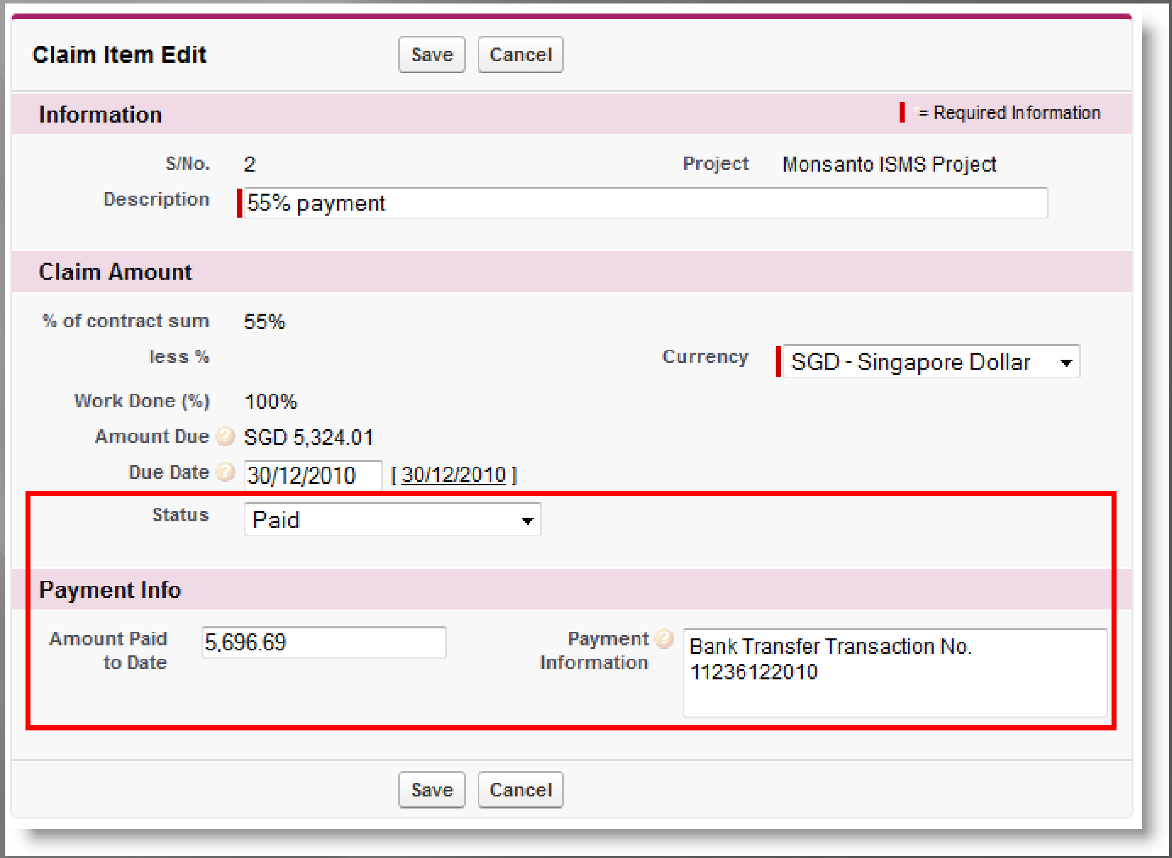
MOHAMMAD FAUZI ANUAR
Consultant

How to send email via SFDC

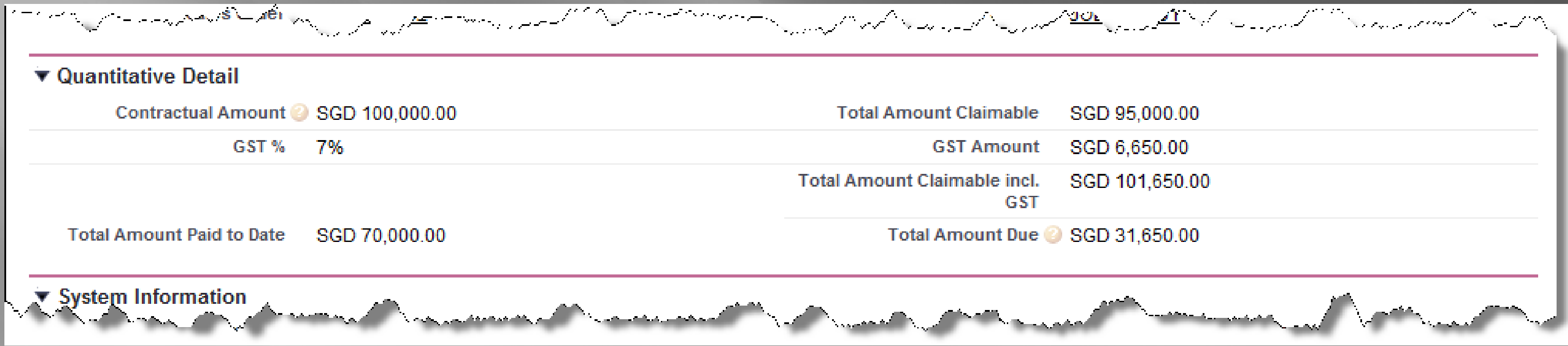
- Under "Activity History" in the same project page, click "Send an Email".
- Attach progress claim, fill in details of email, cc relevant parties.
- Advantage: email will be saved in sfdc, under Activity History



- Once client makes payment, Finance user must update the appropriate Claim Item
  - Fields to update: Status, Amount Paid to Date, Payment Information



- Updates made on Claim Items are automatically applied to the Quantitative Detail section of the Project detail page



Thank you!