

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.

Internal Member Edit
New Internal Member

Internal Member Edit [Save] [Save & New] [Cancel]

Information

Project Singapore Sports Scho

Team Member Joel Hipona

Role --None--

Other Role Description --None--

Assignment Details

Assignment Description

Please check the info and launch this project ASAP.
Thanks

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	<input checked="" type="checkbox"/>	Not Started	
Edit Del	First Site Meeting	300	2	04/12/2010	05/12/2010	<input checked="" type="checkbox"/>	Not Started	Chee Yang Ng
Edit Del	Conduit/Cable Work above Ceiling	400	10	06/12/2010	15/12/2010	<input checked="" type="checkbox"/>	Not Started	
Edit Del	Task Group 1	500	17	15/12/2010	31/12/2010	<input checked="" type="checkbox"/>	Not Started	
Edit Del	Task 1a	600	6	15/12/2010	20/12/2010	<input type="checkbox"/>	Not Started	
Edit Del	Task 1b	700	12	20/12/2010	31/12/2010	<input type="checkbox"/>	Not Started	
Edit Del	Expected Completion Date	2,000	1	31/12/2010	31/12/2010	<input checked="" type="checkbox"/>	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

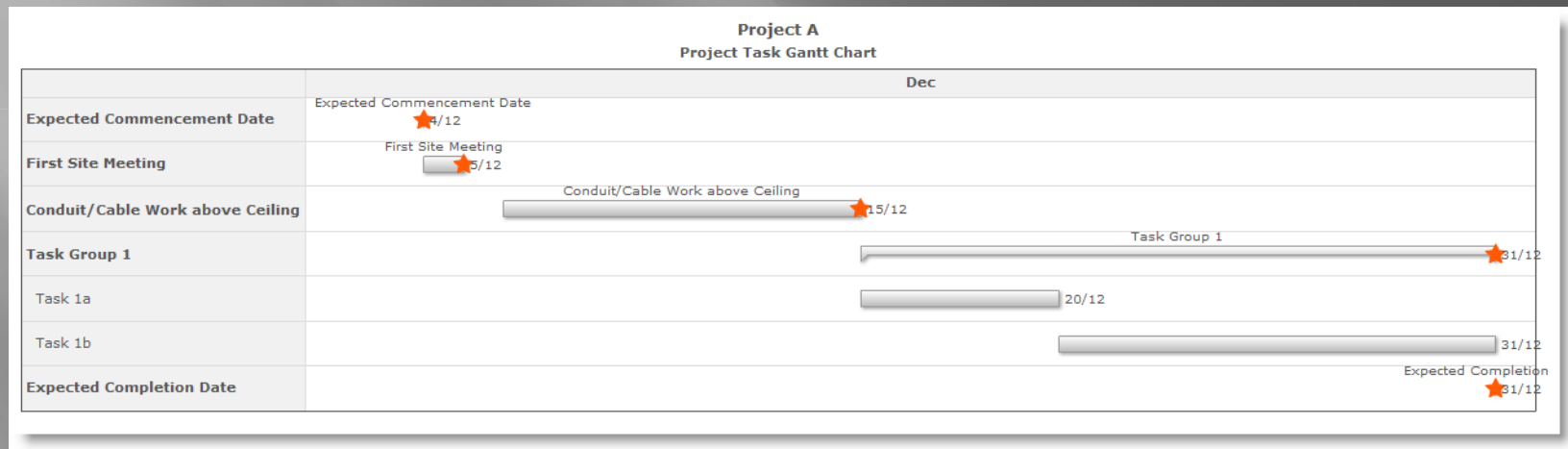
The screenshot shows a web-based form titled 'Project Task Edit' for a task named 'Conduit/Cable Work above Ceiling'. The form is divided into two main sections: 'Information' and 'Task Details'. The 'Information' section includes fields for Project (Singapore Sports School - ISMS), S/No. (400), Task Name (Conduit/Cable Work above Ceiling), Start Date (08/12/2010), and End Date (12/12/2010). The 'Task Details' section includes fields for Assigned To, Status (Not Started), Milestone? (checked), Parent Task, and Group Task? (unchecked). The form has buttons for Save, Save & New, and Cancel at the top and bottom. A legend indicates that a red bar next to a field name signifies required information.

Project Task Edit		Help for this Page ?	
Project Task Edit [Save] [Save & New] [Cancel]			
Information [Red bar] = Required Information			
Project	Singapore Sports School - ISMS	Assigned To	[?] [Icon]
S/No.	400	Status	Not Started [v]
Task Name	Conduit/Cable Work above Ceiling	Milestone?	<input checked="" type="checkbox"/>
Start Date	08/12/2010 [27/12/2010]	Parent Task	[?] [Icon]
End Date	12/12/2010 [27/12/2010]	Group Task?	<input type="checkbox"/>
[Save] [Save & New] [Cancel]			

▣ 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

The screenshot displays the 'Singapore Sports School ISMS' project page. The 'Claim Items' section is highlighted, showing a table with three items: 30% downpayment, 65% payment, and 5% T&C. Below this, the 'Confirmed Sub-Con' is 'SubCon_1' with a 'Confirmed Sub-Con Quote Amount' of 'SGD 9,000'. The 'Description' is 'Design, Delivery, Installation, Testing, Commissioning and Maintenance of Integrated Security Management System for Singapore Sports School, Tender Ref.: 2010/ABC/001/00-XYZ/001'. The 'Customer Information' section is collapsed. The 'Handing Over from Sales to Project' section shows 'Project Details Form' as 'Singapore Sports School ISMS', 'Confirmed Quote' as '1011/09931', 'Sales Order' as 'SON-020210', 'Opportunity' as 'Singapore Sports School - Long Project A', and 'Payment Term' as '30% Downpayment, 65%, 5%T&C' (highlighted with a red box). The 'Job Order' field is empty.

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

The screenshot shows a web-based form titled 'New Claim Item' with a 'Claim Item Edit' header and 'Save', 'Save & New', and 'Cancel' buttons. The form is divided into several sections:

- Information:** Includes fields for 'S.No.' (value: 1), 'Project' (value: Supply & Installation of L...), and 'Description' (value: Completion of Conduit & Cabling for Level 2 & 3, Bldg C). A red bar indicates required information.
- Claim Amount:** Includes fields for '% of contract sum' (value: 30), 'Item %' (value: 5), 'Work Done (%)' (value: 100), 'Amount Due' (value: 30000), 'Due Date' (value: 15/06/2012), and 'Status' (value: Approved). A 'Currency' dropdown is set to '\$GD - Singapore Dollar'.
- Payment Info:** Includes a field for 'Amount Paid to Date' (value: 0.00) and a 'Payment Information' field.

At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

- 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

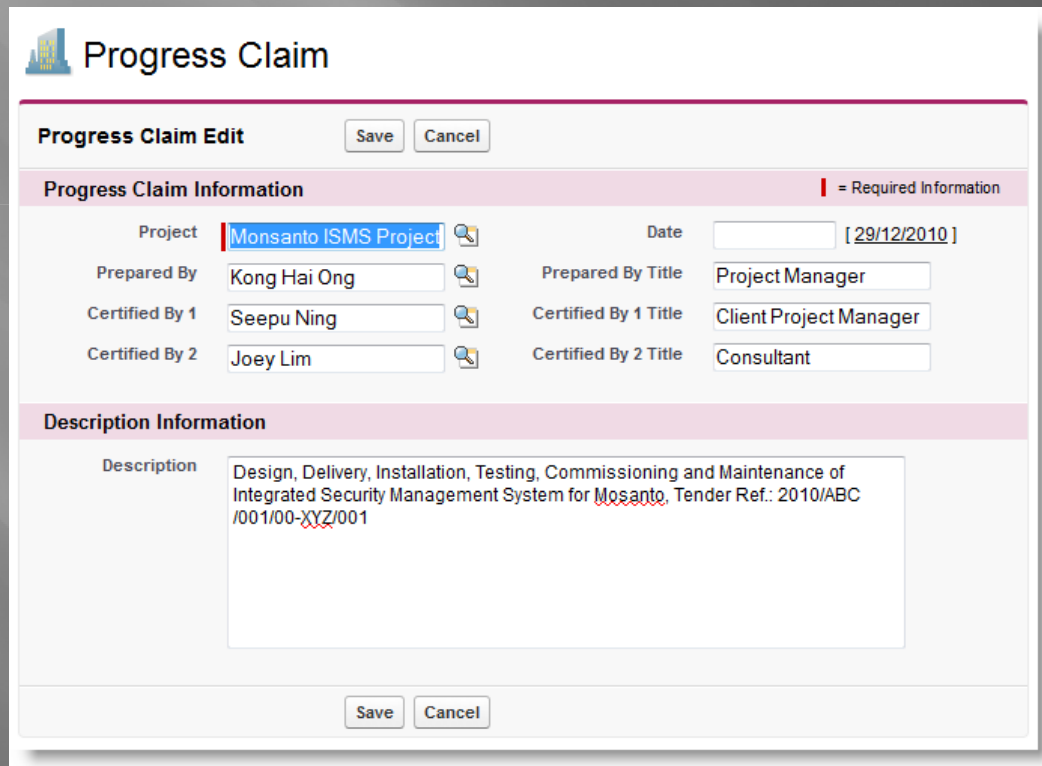
New Progress Claim Report

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



The screenshot shows a web-based form titled "Progress Claim" with a sub-header "Progress Claim Edit". The form is divided into two main sections: "Progress Claim Information" and "Description Information".

Progress Claim Information

This section contains the following fields:

- Project:** Monsanto ISMS Project (with a magnifying glass icon)
- Date:** [29/12/2010]
- Prepared By:** Kong Hai Ong (with a magnifying glass icon)
- Prepared By Title:** Project Manager
- Certified By 1:** Seepu Ning (with a magnifying glass icon)
- Certified By 1 Title:** Client Project Manager
- Certified By 2:** Joey Lim (with a magnifying glass icon)
- Certified By 2 Title:** Consultant

Description Information

This section contains a single text area labeled "Description" with the following content:

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

At the bottom of the form, there are "Save" and "Cancel" buttons.

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

EditDeleteClonePrint 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

EditDeleteClonePrint 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

snbProgressClaimPDF (application/pdf Object) - Mozilla Firefox

1 / 1 75% Find

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 298.10	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 298.10
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

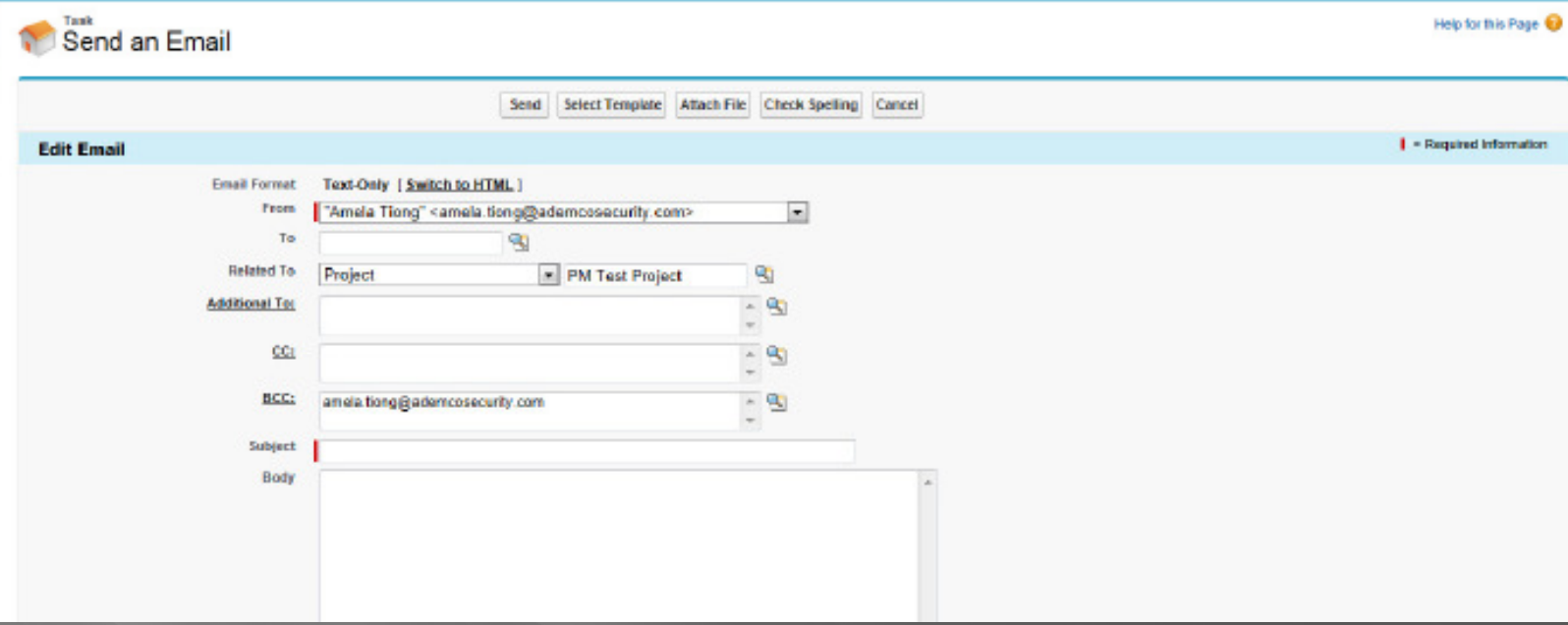
Certified By: _____
SINFATT LEE
Client Project Manager

MOHAMMAD FAUZI ANUAR
Consultant

Done

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



The screenshot shows the 'Send an Email' interface in Salesforce. At the top, there's a 'Task' icon and the title 'Send an Email'. A 'Help for this Page' link is in the top right. Below the title bar, there are buttons: 'Send', 'Select Template', 'Attach File', 'Check Spelling', and 'Cancel'. A light blue bar labeled 'Edit Email' contains a red exclamation mark icon and the text '= Required Information'. The form fields include: 'Email Format' set to 'Text-Only' with a 'Switch to HTML' link; 'From' set to 'Amela Tiong <amela.tiong@adammcosecurity.com>'; 'To' with an empty field and a search icon; 'Related To' with a dropdown set to 'Project' and a text field containing 'PM Test Project'; 'Additional To' with an empty field and a search icon; 'CC' with an empty field and a search icon; 'BCC' set to 'amela.tiong@adammcosecurity.com'; 'Subject' with an empty field; and 'Body' with a large text area.

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

Claim Item Edit

SaveCancel

Information

= Required Information

S/No. 2Project Monsanto ISMS Project

Description 55% payment

Claim Amount

% of contract sum 55%

less %

Work Done (%) 100%

Amount Due SGD 5,324.01

Currency SGD - Singapore Dollar

Due Date 30/12/2010 [30/12/2010]

Status Paid

Payment Info

Amount Paid to Date 5,696.69

Payment Information Bank Transfer Transaction No. 11236122010

SaveCancel

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

▼ Quantitative Detail			
Contractual Amount ⓘ SGD 100,000.00		Total Amount Claimable	SGD 95,000.00
GST % 7%		GST Amount	SGD 6,650.00
		Total Amount Claimable incl. GST	SGD 101,650.00
Total Amount Paid to Date SGD 70,000.00		Total Amount Due ⓘ	SGD 31,650.00
▼ System Information			

Thank you!

