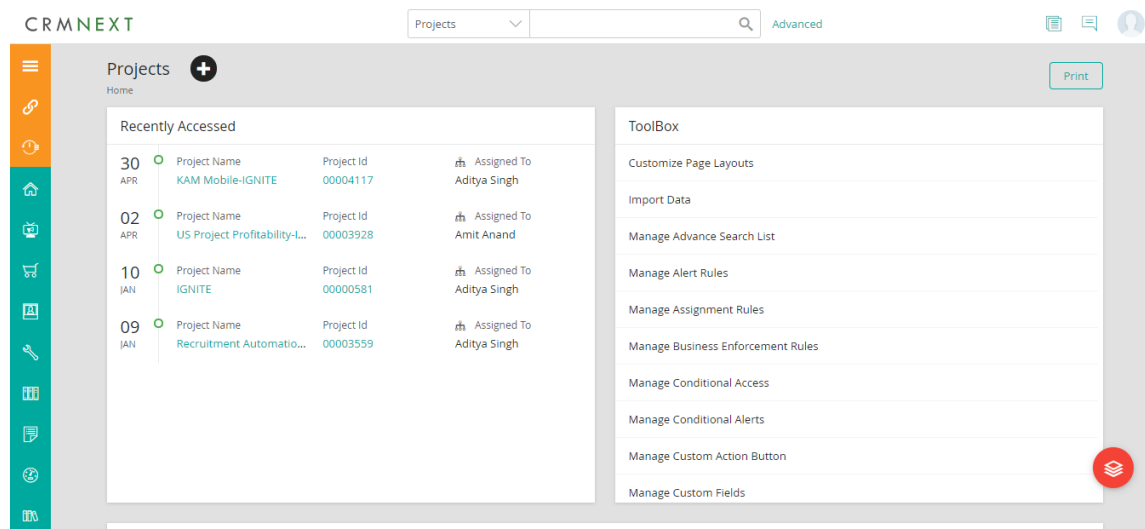


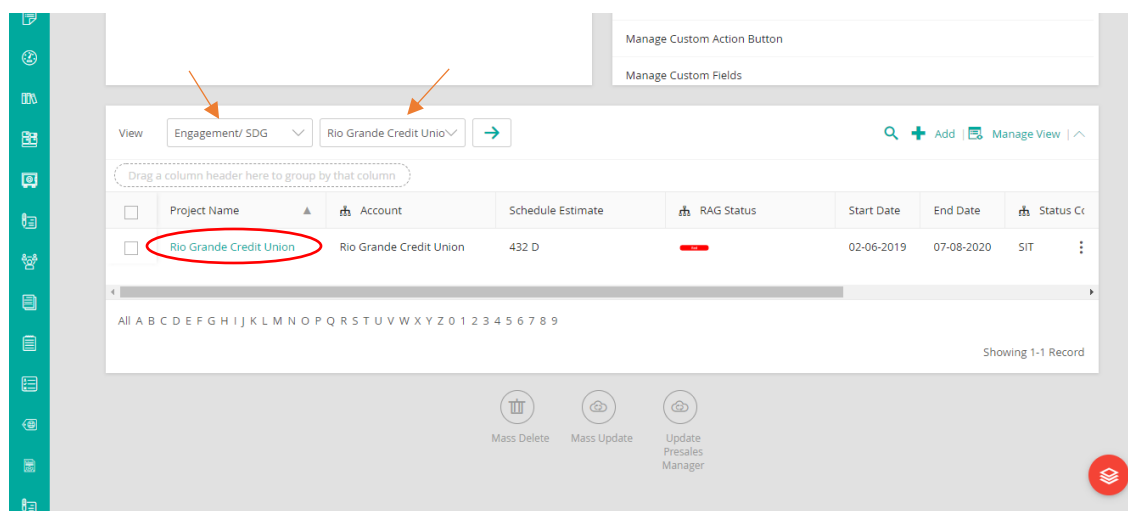
Steps: To Add a Resource in a Project

NOTE : If case is assigned regarding allotting project for timesheet -> move to invalid as the timesheet is based on a project and the project is being created by the project manager, we cannot allocate any project. So please get in touch with your (Reporting manager) for the same.

Step 1: Go to Required Object – (i.e Project in this case)

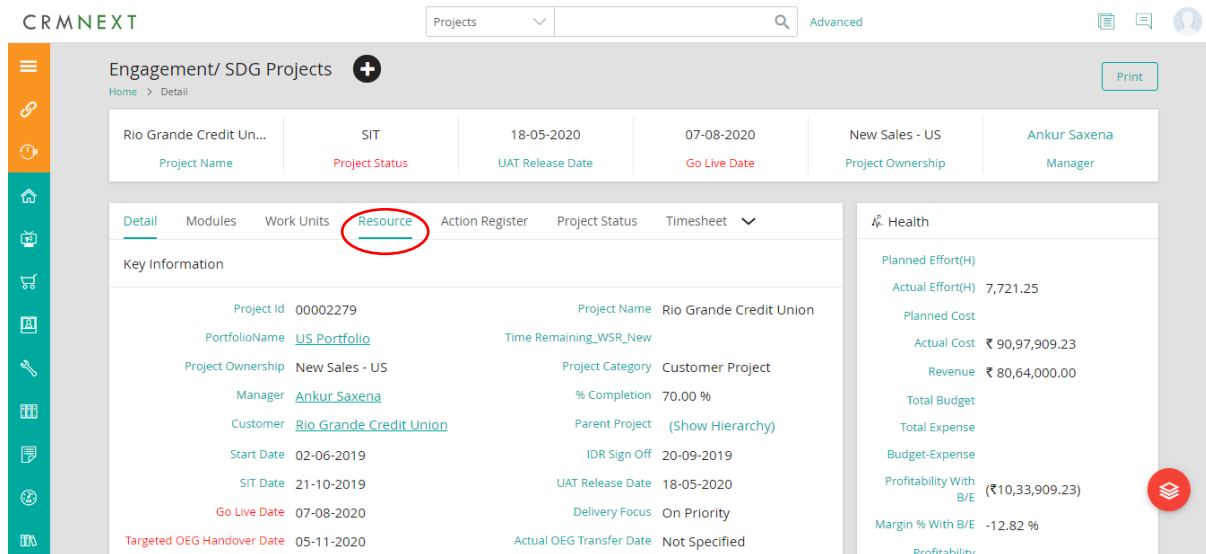


Step 2: Now Scroll down, where custom view is previewed. Select the Required view and corresponding project name in the scroll down menu respectively.



Step 3: List of related Projects would be listed down below. Click on the desired project you want to go to. (as showcased I have selected **Rio Grande Credit Union** as my Project)

Step 4: On clicking the Project name it will direct to the Project's corresponding Detail page. Locate the **Resource** tab at fourth Tab from left and click on it.



The screenshot shows the CRMNEXT interface for a project named 'Rio Grande Credit Union'. The 'Resource' tab is highlighted with a red circle. The page displays various project details and a health summary.

Project Name	Project Status	UAT Release Date	Go Live Date	Project Ownership	Manager
Rio Grande Credit Un...	SIT	18-05-2020	07-08-2020	New Sales - US	Ankur Saxena

Key Information

Project Id	00002279	Project Name	Rio Grande Credit Union
PortfolioName	US Portfolio	Time Remaining_WSR_New	
Project Ownership	New Sales - US	Project Category	Customer Project
Manager	Ankur Saxena	% Completion	70.00 %
Customer	Rio Grande Credit Union	Parent Project	(Show Hierarchy)
Start Date	02-06-2019	IDR Sign Off	20-09-2019
SIT Date	21-10-2019	UAT Release Date	18-05-2020
Go Live Date	07-08-2020	Delivery Focus	On Priority
Targeted OEG Handover Date	05-11-2020	Actual OEG Transfer Date	Not Specified

Health Summary

Planned Effort(H)	
Actual Effort(H)	7,721.25
Planned Cost	
Actual Cost	₹ 90,97,909.23
Revenue	₹ 80,64,000.00
Total Budget	
Total Expense	
Budget-Expense	
Profitability With B/E	(₹10,33,909.23)
Margin % With B/E	-12.82 %
Profitability	

Step 5: On Clicking the Resource Tab it will redirect to a Resource page where members list is defined. Now to Add a new member, go to **Manage Member** in the right corner of the header list.



CRMNEXT

Projects

Advanced

Engagement/ SDG Projects

Home > Detail

Print

Rio Grande Credit Un...	SIT	18-05-2020	07-08-2020	New Sales - US	Ankur Saxena
Project Name	Project Status	UAT Release Date	Go Live Date	Project Ownership	Manager

Detail Modules Work Units Resource Action Register Project Status Timesheet

Members List

Manage Member

Drag a column header here to group by that column

Name	EndDate	StartDate	Member Team
Abdullah Siddiqui	31-12-2019	22-07-2019	SAG
Aman Upadhyay	31-12-2019	01-04-2019	SDG
Ankur Saxena	30-06-2020	23-03-2020	ESG
Anubhav Pradhan	31-12-2019	24-07-2019	US Delivery Team

Health

Planned Effort(H)

Actual Effort(H) 7,721.25

Planned Cost

Actual Cost ₹ 90,97,909.23

Revenue ₹ 80,64,000.00

Total Budget

Total Expense

Budget-Expense

Profitability With B/E (₹10,33,909.23)

Margin % With B/E -12.82 %

Profitability

Step 6: On clicking Manage member, it will to a new window. Where one has to specify the criteria for members to be added. (For instance, let's select the column criteria as 'first name'. Operation as 'like', now enter the first name of the member to be added in the Value field.

Member Listing

Specify the Criteria for Members

New Filter

Column	Operation	Value
First Name	Like	Prithwin
-Select-		
-Select-		

Go

Member Listing

Member	Member Name	Object Type
<input type="checkbox"/>	Prithwin Sunag	User

Add Close

Generated in 0.28 s

Step 7: On clicking 'GO' button after providing the criteria. It will provide number of members related to provided criteria.



Member Listing

Go

Member Listing

<input checked="" type="checkbox"/>	Member	Member Name	Object Type
<input checked="" type="checkbox"/>	220565	Prithwin Sunag	

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Showing 1

Member Information

*Start Date 05-05-2020

*End Date 30-05-2020

Add Close

Generated in 0.28 s

Step 8: Select the desired member by clicking on the check box provided in the left side corresponding to individual listing.

Step 9: Now after selecting the member, select the Start Date and End Date in the calendar pop up menu. After Selecting the dates, click on 'Add' button to finally get the desired member added to corresponding Project.

Step 10: The respective project name is visible in the timesheet of the corresponding member.

