

Credex Project Management System User Guide



Credex Technology Inc

San Ramon, USA

SalesforceApps@credextechnology.com

www.credextechnology.com

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Document Revisions

Date	Version	Author(s)	Document Changes
05-Oct-2023	1.2	Credex Technology	Initial version

Document Approvals

Date	Name	Title / Role	Remarks
6-Oct-2023	Rajeev Bhalla	Project Manager	Reviewed & Approved

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1 Project Management System

1.1 Introduction

This document is a user manual & provides detailed information on using the Credex Project Management System.

1.2 Objective

Credex PMS is a well-designed Project management system helping companies to drive projects & business programs and achieve growth. The overall objectives of performance management are:

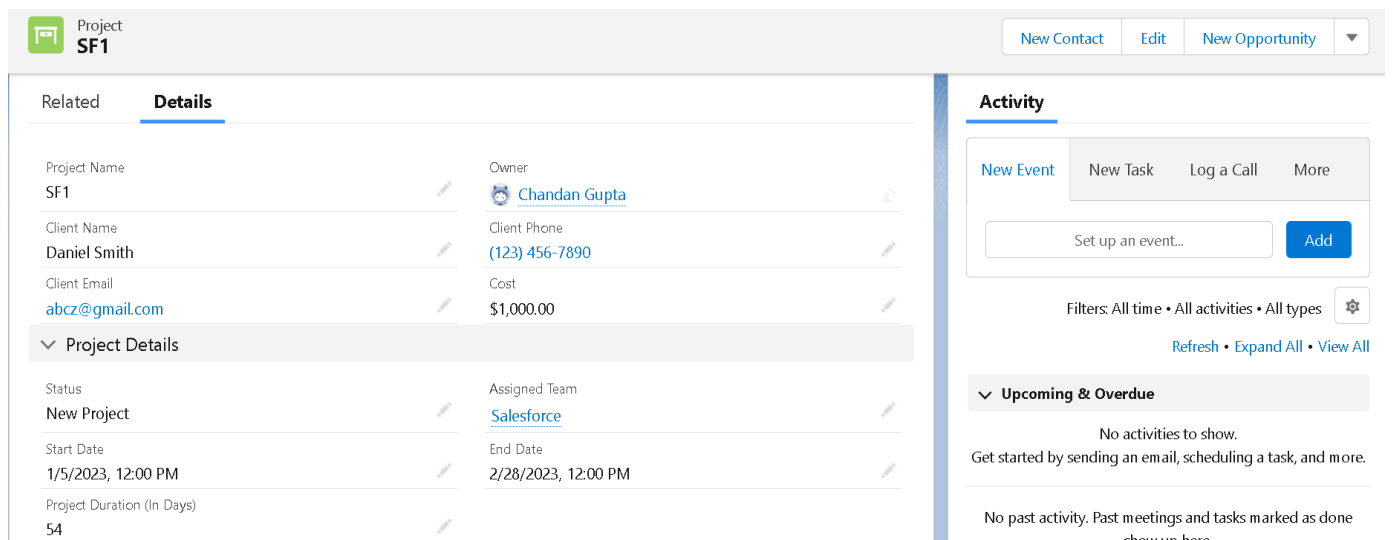
- To align and build individual objectives along with the organizational objectives of the company.
- To enhance the skills and personal development of employees, largely with the help of managers and leaders.
- To encourage work and working systems that help all employees in fulfilling their business goals.
- To effectively communicate between individuals and teams.

2 Scope

The scope of Project Management System is to bring about the common understanding of strategies and processes among all the stakeholders of a delivery team to define its overall success. The scope compromises of the all the functionalities and specifications outlined in its requirements.

3 Key PMS Features / Elements

3.1 Project



The screenshot displays the 'Project SF1' interface. At the top, there are buttons for 'New Contact', 'Edit', and 'New Opportunity'. The main content is divided into two sections: 'Details' and 'Activity'.

Details Section:

Related		Details	
Project Name	SF1	Owner	 Chandan Gupta
Client Name	Daniel Smith	Client Phone	(123) 456-7890
Client Email	abcz@gmail.com	Cost	\$1,000.00
▼ Project Details			
Status	New Project	Assigned Team	Salesforce
Start Date	1/5/2023, 12:00 PM	End Date	2/28/2023, 12:00 PM
Project Duration (In Days)	54		

Activity Section:

Activity

[New Event](#) [New Task](#) [Log a Call](#) [More](#)

[Add](#)

Filters: All time • All activities • All types 

[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue

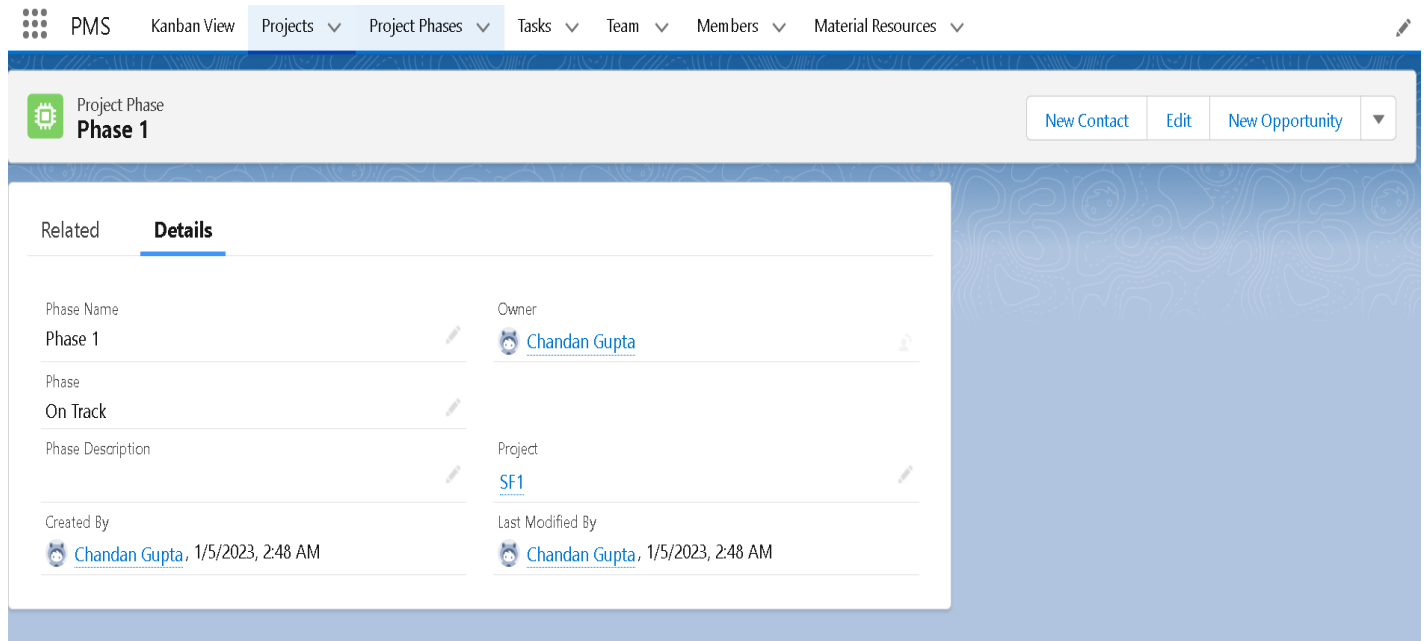
No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Users (Project Manager) can create projects using **Projects** tab and can fill all the necessary information about the Client and project like Estimated start and End Date of the Project, Cost Decided about the project etc.

Name, Client Phone, Assigned Team are the mandatory fields for the project object.

3.2 Project Phases

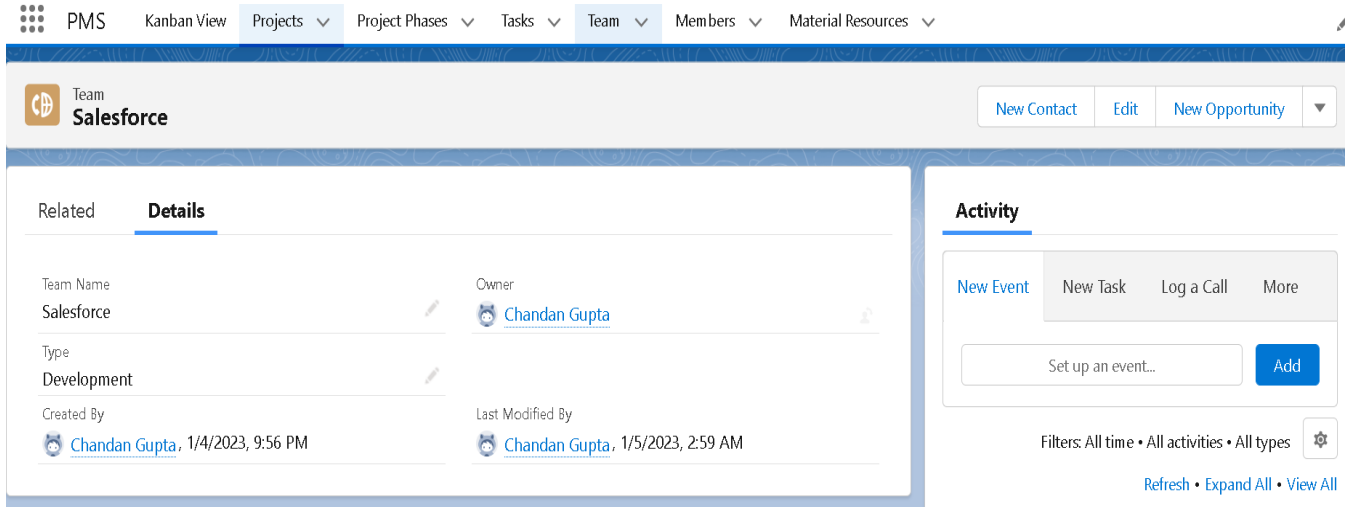


The screenshot displays the 'Project Phases' tab within the Credex Project Management System. The top navigation bar includes 'PMS', 'Kanban View', 'Projects', 'Project Phases', 'Tasks', 'Team', 'Members', and 'Material Resources'. The main header shows 'Project Phase Phase 1' with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing a table with the following data:

Related	Details
Phase Name	Owner
Phase 1	 Chandan Gupta
Phase	
On Track	
Phase Description	Project
	SF1
Created By	Last Modified By
 Chandan Gupta , 1/5/2023, 2:48 AM	 Chandan Gupta , 1/5/2023, 2:48 AM

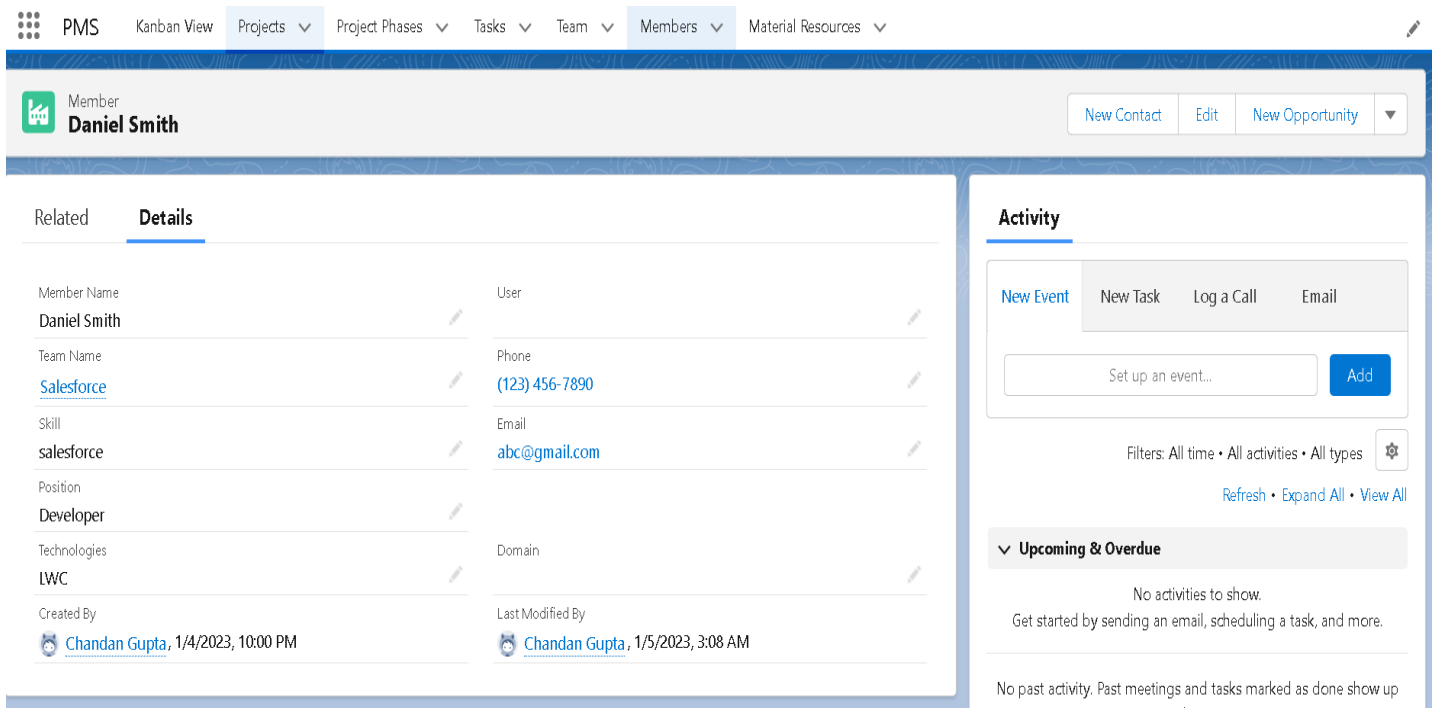
Project Phases Tab can be used to create multiple phases of the project. User can mention the description about each Phase of the project.

3.3 Team



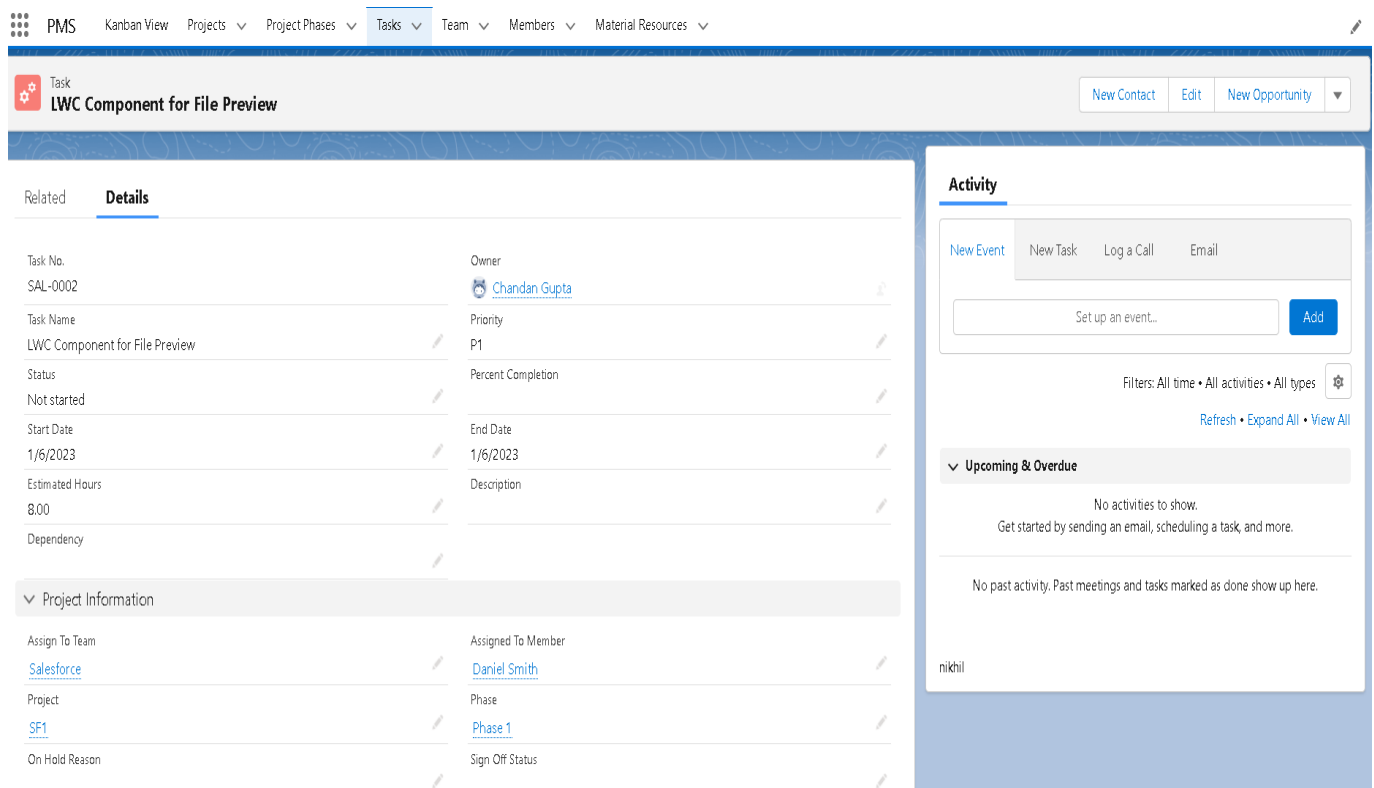
Every organization must have a Team to work in a Team Mode. So, here Team tab works same to Create Team in the organization so that we will use these teams to assign to the members of the organization.

3.4 Members



Here we can create the Members for the organization, can Assign Member to the Team Exists in the Organization. We can create the members based on the Pre-existing users in the organization some key Details can also fill about the Member like their Skills and Personal Details.

3.5 Tasks



The screenshot displays the 'Tasks' tab in the Credex Project Management System. The interface features a navigation bar at the top with options like 'PMS', 'Kanban View', 'Projects', 'Project Phases', 'Tasks', 'Team', 'Members', and 'Material Resources'. The main content area is divided into two sections: 'Details' and 'Activity'.

Details Section:

- Task No.:** SAL-0002
- Task Name:** LWC Component for File Preview
- Status:** Not started
- Start Date:** 1/6/2023
- Estimated Hours:** 8.00
- Dependency:**
- Owner:** Chandan Gupta
- Priority:** P1
- Percent Completion:**
- End Date:** 1/6/2023
- Description:**

Activity Section:

- New Event:** A button to create a new event.
- Search Bar:** A text input field with the placeholder 'Set up an event...' and an 'Add' button.
- Filters:** A dropdown menu showing 'All time', 'All activities', and 'All types'.
- Upcoming & Overdue:** A section header for activities.
- No activities to show:** A message indicating that there are no activities to display.
- Get started by sending an email, scheduling a task, and more:** A suggestion for actions.
- No past activity:** A message indicating that there are no past activities.
- Past meetings and tasks marked as done show up here:** A suggestion for actions.
- nikhil:** A name listed at the bottom of the activity section.

Task Tab is used to create and assign tasks to the members of the Project.

During the creation of the Task user must have to fill some information about the Task such as Status of the Task, Start & End Date, Estimated Hours of the Task.

There are some fields like **Assigned To Member**, **Project** and **Phase** which are dependent on **Assign To Team** field. **Assigned To Member** field will display the values according to **Assign To Team** field. Then, Project values will come as per the **Assigned To Member** field. Similarly, **Phases** will come according to the **Project** Selected. So, there is tight coupling of these fields to **Assigned To Member** field.

3.6 Material Resources

PMS Kanban View Projects Project Phases Tasks Team Members Material Resources

Material Resource **Laptop** New Contact Edit New Opportunity

Related **Details**

Resource Name	Owner
Laptop	Chandan Gupta
Work	
Development	
Cost	Task
Start Date	Finish Date
1/10/2023, 12:00 PM	1/26/2023, 12:00 PM
Categories	Duration (In Days)
IT	16
Created By	Last Modified By
Chandan Gupta, 1/5/2023, 3:33 AM	Chandan Gupta, 1/5/2023, 3:33 AM

Material Resources Tab is use to create request for the material resources needed for the task.

3.7 Kanban View

PMS Kanban View Projects Project Phases Tasks Team Members Material Resources

Select Users to see Their Tasks

Daniel Smith

Project Tickets

Not started	Code Review	In-progress	Deployed	Completed
Active time tracker Priority : P2 AssignedTo : Daniel Smith Hours : 10 Project : Airline Reservation System Status : Not started	LWC Component Priority : P3 AssignedTo : Daniel Smith Hours : 12 Project : Airline Reservation System Status : Code Review	Test class Priority : P1 AssignedTo : Daniel Smith Hours : 8 Project : Airline Reservation System Status : In-progress	Apex Trigger with test class Priority : P4 AssignedTo : Daniel Smith Hours : 15 Project : Airline Reservation System Status : Deployed	Query Handling Priority : P1 AssignedTo : Daniel Smith Hours : 8 Project : Airline Reservation System Status : Completed
Apex Class for Integration with SL... Priority : P1 AssignedTo : Daniel Smith Hours : 8 Project : Lead Management System Status : Not started	LWC Component is not working f... Priority : P3 AssignedTo : Daniel Smith Hours : 8 Project : Lead Management System Status : Code Review	component URL is not working Priority : P1 AssignedTo : Daniel Smith Hours : 10 Project : Airline Reservation System Status : In-progress	Barcode is not scanning properly Priority : P2 AssignedTo : Daniel Smith Hours : 8 Project : Lead Management System Status : Deployed	Drop down in vf page is not work... Priority : P1 AssignedTo : Daniel Smith Hours : 5 Project : Airline Reservation System Status : Completed

Kanban view is a tool which is used to see the Task Assigned to the members of the project & Organization. By using **Kanban View**, Project Managers or Team Leads can Easily Track the status of the tasks assigned to them.

This tool also helps the members to track the **Status** of the Tasks assigned to them. They can easily update the status of the Task by Using the **Drag and Drop** functionality of the Kanban view.