Capability Overview

https://pk4.tech

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PK4 Project & Time

A Salesforce-native operating system for project delivery, product execution, people, time, and project economics

This document details the breadth and scope of PK4 Project & Time for process management and optimization enterprises.

Executive Overview

PK4 helps organizations create visibility, context, and control across complex processes. PK4 Project & Time applies that same operating discipline to the work behind delivery: planning projects, structuring product work, assigning people, recording effort, governing approvals, monitoring risk, and connecting execution to cost and billing inside Salesforce.

- **One Salesforce-native system** for projects, tasks, teams, time, PTO, expenses, materials, risks, and invoices.
- **Reusable templates** and an AI-assisted project wizard accelerate setup while preserving review and control.
- **Calendar, Kanban, Gantt, Grid, Risk, Task Assignment, and Task Dependence views** support different planning styles.
- **Skills, certifications, roles, availability, and assignment load** help match people to work.
- **Live and manual time capture**, approvals, project economics, and invoicing connect delivery activity to financial outcomes.

Fit statement. PK4 provides a unified execution layer in Salesforce for product programs, customer implementations, professional services, and cross-functional initiatives.

How PK4 supports process management enterprises:

Process Management Enterprises	PK4 support	Outcome to evaluate
Customer implementation and services engagements	Templates, milestones, assignments, time, approvals, expenses, risks, and invoicing.	Consistent delivery with current effort, margin, and schedule visibility.
Product development programs	Epics, sprints, backlog items, story points, acceptance criteria, dependencies, baselines, and multi-view planning.	Connect planned product work with actual effort, capacity, blockers, and completion.
Cross-functional transformation initiatives	Project types, WBS task structures, risk registers, checklists, comments, teams, and progress measures.	A common operating record across owners, workstreams, and decision points.

Process Management Enterprises	PK4 support	Outcome to evaluate
Specialist staffing and capacity	Skills, skill levels, certifications, roles, disciplines, availability, task assignments, PTO, and shifts.	Match process, product, implementation, and technical specialists to the right work.
Portfolio and delivery oversight	My Projects, project health, budget and hours utilization, schedule progress, billable efficiency, and Salesforce reporting.	Earlier visibility into delivery risk and resource pressure.

Capability map

Area	Included capability	What it enables
Project setup	Project Wizard; reusable project/task templates; project types; automatic template application; project and task ownership.	Faster, repeatable setup for common implementation, product, or internal project patterns.
Work planning	WBS and parent-child tasks; milestones; backlog items; epics; sprints; story points; acceptance criteria; priorities; stages.	A structured path from higher-level initiative to executable work.
Scheduling and dependencies	Planned dates and duration; predecessor relationships and offsets; date recalculation; conflict detection; Calendar, Gantt, Kanban, and Grid views.	Visible sequencing, blockers, and schedule impact.
People and capacity	Project teams; task assignments; weekly availability; assigned versus logged hours; skills, levels, certifications, roles, and disciplines.	Capacity-aware staffing with qualification context.
Time and approvals	Live check-in/out; manual and multi-entry patterns; billable and nonbillable time; breaks and rounding; manager/delegate approvals; reminders.	Reliable actuals with governed review.
Risk and controls	Risk probability, impact, score, owner, due date, mitigation, contingency, and status; task blockers and dependency conflicts.	A practical risk register connected to delivery work.
Economics and billing	Estimates, rates, budget, loaded cost, billable amount, expenses, materials, invoice details, taxes, payment status, and reminders.	Traceable movement from effort and cost to client billing.
Access and extensibility	Salesforce permissions, sharing, configurable objects and fields, Flow automation, Experience Cloud access, and platform events.	Fit to customer governance and Salesforce operating standards.

Project and product execution

PK4 supports both project delivery and the execution side of product management. Teams can organize work into projects, epics, sprints, backlog items, milestones, and tasks, then relate that structure to owners, assigned people, dates, effort, dependencies, risks, and actual time.

Repeatable setup and planning

- Create reusable project and task templates with default estimates, rates, descriptions, sequence, hierarchy, offsets, durations, billable flags, milestones, priorities, and stages.
- Apply templates automatically by project type or deliberately to an eligible project, with safeguards against duplicate task creation.
- Use the Project Wizard to propose and save a project structure from a description and supporting inputs, including tasks, assignments, skills, and risks, subject to user review and configured AI services.
- Create a template from a successful project so repeatable delivery knowledge becomes reusable operational structure.

Plan, sequence, and adapt work

- Review work through Calendar, Kanban, Gantt, Grid, Risk, Task Assignment, and Task Dependence perspectives.
- Represent parent-child work, WBS order, milestones, task stages, backlog status, epics, sprints, story points, and acceptance criteria.
- Model predecessor relationships with dependency types and offsets; detect conflicts and recalculate dates when upstream work changes.
- Capture baseline project and task information for comparison with current delivery plans.
- Track blocked work, reasons, progress, assigned versus logged hours, status, priority, and completion.

Collaborate around delivery

- Use project teams, task assignments, checklists, comments, mentions, notifications, and files to keep work context attached to Salesforce records.
- Open the underlying project, task, risk, assignment, or time record for detailed review and Salesforce automation.

Time, approvals, and workforce operations

Time capture

- Capture time with live check-in/out or manual entry, including configuration-supported multi-entry and multi-day workflows.
- Record effort against projects, tasks, cases, accounts, opportunities, work types, and other configured Salesforce records.
- Separate billable and nonbillable time; calculate rounded time, breaks, regular time, overtime, and double time where configured.
- Preserve source and device context, start/end timestamps, notes, and optional location details for eligible use cases.
- Support browser, Salesforce, mobile, kiosk, Jira, Slack, and Experience Cloud entry channels according to licensed modules and configuration.

Review and approval

- Submit and review time by period, with detailed approval status, approver comments, approval timestamps, and reminders.
- Use manager and delegate relationships to scope approval work; approve eligible individual entries or groups.
- Review time on a map where location capture is enabled, including active check-ins, user/date summaries, filters, and controlled batch approval.
- Keep already approved, rejected, or still-open records from being approved through the location-review workflow.

Skills, capacity, shifts, and leave

- Maintain skills, categories, proficiency levels, certifications, roles, role levels, disciplines, departments, administrative units, and user groups.
- Compare weekly availability with current assignments and hours to inform staffing decisions.
- Plan shifts using templates, locations, staffing needs, required skills or certifications, preferences, open shifts, and swap requests
- Manage PTO types, requests, approval status, managers, dates, durations, and current balances/status.

Project economics, invoicing, and insight

Project economics

- Track estimated hours and amount, hourly rates, available budget, actual hours, approved hours, billable hours, project expenses, and fully loaded cost.
- Measure project health, hours utilization, budget utilization, schedule progress, productivity, billable efficiency, and earned-value-style indicators from Salesforce records.
- Maintain task- and user-level rates and costs where more detailed economics are required.

Expenses, materials, and invoicing

- Capture project- or task-related expenses with vendor, category, receipt, date, amount, requester, approver, and approval status.
- Track materials used, quantities, unit prices, and invoice associations.
- Generate invoice headers and details from eligible time and material information, then review totals, taxes, surcharges, payment terms, due dates, send status, payment method, balance, and collection status.
- Use branded email templates, reminders, and available QuickBooks Desktop or Xero integration touchpoints after confirming the required edition and integration design.

Operational visibility

- Use My Projects and project views for consolidated status, risk, budget, schedule, and completion visibility.
- Use packaged reports for hours by user, hours by project, and user utilization, then extend reporting with standard Salesforce reports and dashboards.
- Filter and tailor grids, columns, and views for different delivery and management roles.

Boost Productivity

100% native Agentforce Agents to free your team from time-wasting admin work.

- Create, assign, and update tasks with an AI agent. AI-triggered reminders and workflows.
- Automatic time tracking via an agent
- Get live project status, deadlines, and budget overviews
- Natural language to update project timelines, assign resources or pull reports
- Agents get smarter with every interaction, learning from your workflows.

Salesforce-native foundation and extensibility

PK4 stores project, task, time, workforce, risk, expense, and invoice information as Salesforce records. That foundation allows customers to apply their existing Salesforce identity, permissions, sharing, reporting, automation, and integration patterns.

- Role-appropriate applications and permission sets for TimeTracker, Projects, Skills and Certifications, Shift Management, community users, and administrative access.
- Configurable fields, record types, validation, Flow automation, notifications, and approval patterns without requiring a separate operational database for core records.
- Experience Cloud support for eligible partner or external-user workflows.
- Platform events and Salesforce APIs for event-driven extensions and governed integration design.
- Secure Apex patterns, sharing-aware services, and field-level checks represented in the package code; final security behavior still depends on the deployed Salesforce configuration.

Items to confirm in a focused solution review

The product breadth is substantial, while the right configuration depends on operating choices. A focused review should confirm:

- Primary use cases: product development, customer implementation, professional services, internal transformation, or a phased combination.
- Desired product hierarchy and governance, including idea intake, portfolio prioritization, releases, epics, sprints, and Jira ownership of record.
- User populations and entry channels, including Salesforce users, non-Salesforce users, mobile, Jira, Slack, kiosk, and Experience Cloud.
- Approval cycles, time policies, location requirements, privacy controls, and exception handling.
- Resource model: teams, roles, skills, certification requirements, capacity, contractors, shifts, and PTO.
- Financial scope: billable rates, loaded cost, expenses, materials, invoicing, currencies, tax, QuickBooks Desktop, Xero, or another finance system.
- Integration scope, including whether any exchange with Process360 Live is desired. No prebuilt Process360 integration was identified in the reviewed package.
- Migration, reporting, security, licensing, and implementation sequencing.

Recommended next step

Run a 60-minute customer-based solution-mapping session. Use one customer implementation, one product-delivery program, and one resource-capacity scenario. PK4 can then demonstrate each workflow end to end and return a confirmed scope covering configuration, integrations, licenses, migration, and implementation phases.