



TeamBoard For Salesforce

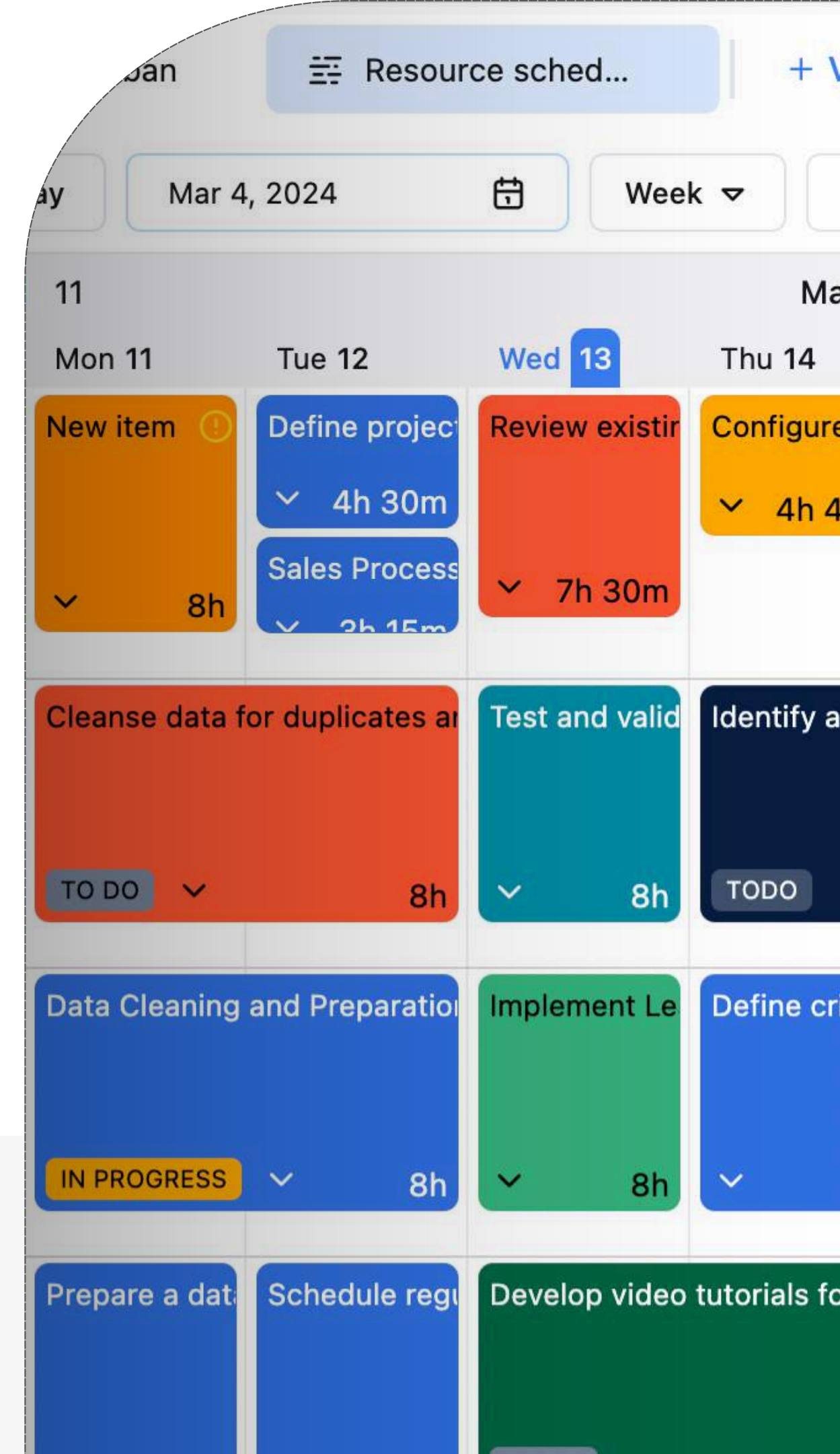
Developed By  **DevSamurai**



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ABOUT US

TEAMBOARD FOR SALESFORCE

TeamBoard for Salesforce is a premier app for resource capacity planning within Salesforce. It provides tools for *Project portfolio management, workload management, timelines, calendars, time tracking, and risk management*. This integration enhances project oversight and efficiency directly within the Salesforce environment.



Google Cloud
Infrastructure



SOC 2 TYPE II
CERTIFIED

Google Cloud infrastructure and **SOC 2 Compliance** are significant milestones for DevSamurai and are crucial to our promise to our clients. They reinforce our dedication to security and trust, principles that are deeply embedded in the fabric of **TeamBoard**





USER'S PROBLEMS



PROJECT MANAGER



TEAM LEADER



PRODUCT OWNER

Resource Allocation

Difficulty in managing and optimizing resources

Challenges in balancing workload among team

Issues with resource distribution across projects

Project Tracking

Problems with maintaining visibility of project status

Lack of real-time progress updates for teams

Difficulty in monitoring product development phases

Time Management

Inaccurate time tracking impacting project billing

Problems in assessing team's time efficiency

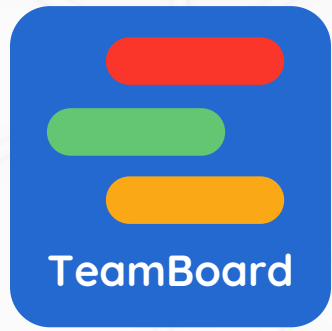
Need for precise tracking of development time for prioritization

Risk Management

Inadequate tools to foresee and mitigate risks

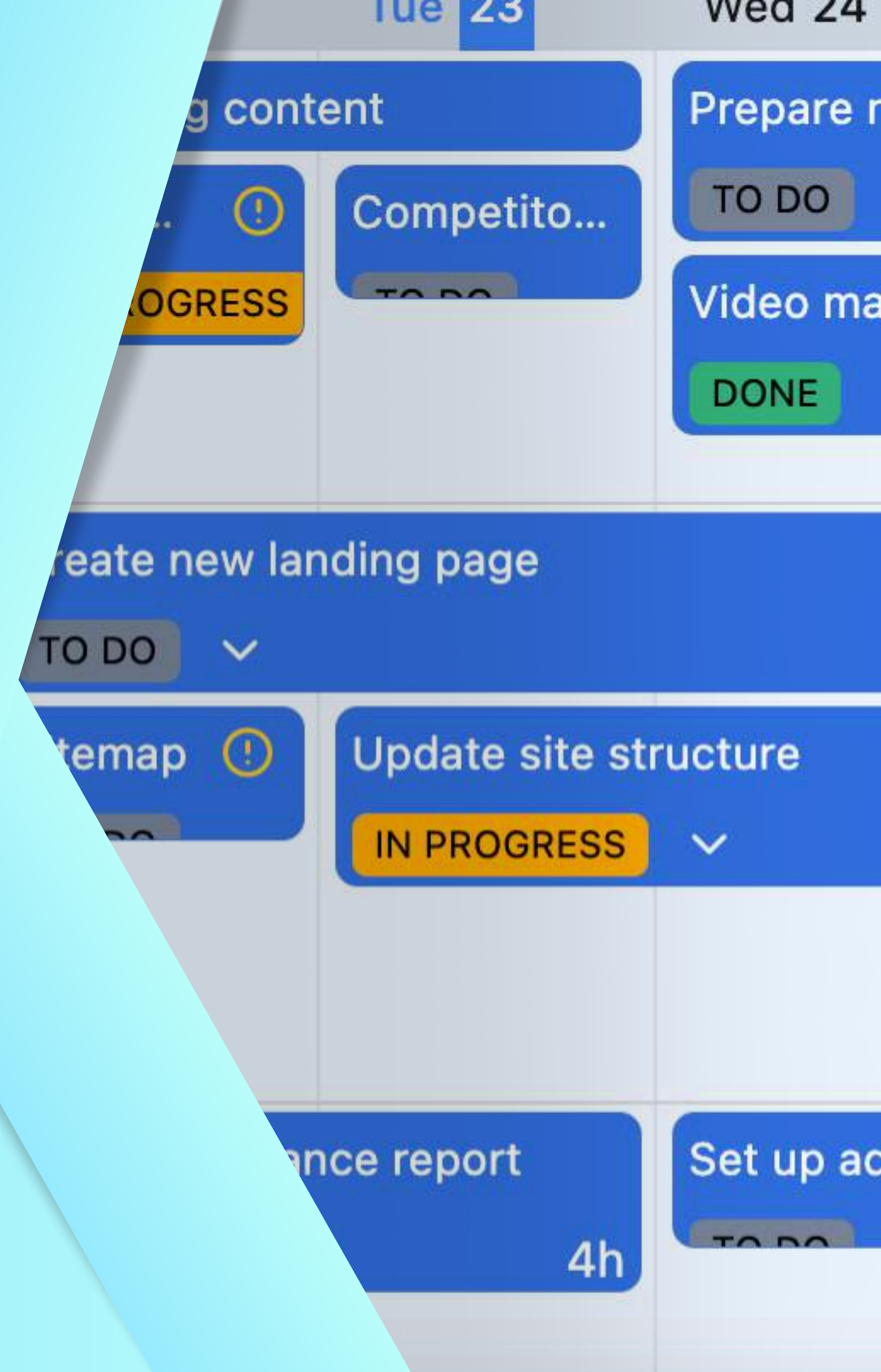
Insufficient early warning systems for project bottlenecks

Lack of proactive measures for critical deliverable risks



TEAMBOARD'S SOLUTIONS

TeamBoard provides a comprehensive solution that integrates seamlessly with Salesforce to optimize project management, enhance resource allocation, and improve risk mitigation across various organizational roles.



SOLUTIONS



TASK MANAGEMENT

Enable users to create, assign, track, and manage tasks throughout the lifecycle of a project.



RESOURCE MANAGEMENT

Assists in optimizing resource allocation and improving the distribution of workloads across projects.



TIME TRACKING

Enables precise monitoring of the time spent on specific tasks, improving accuracy in project tracking and billing.



REPORTING

Track project progress and manage resources efficiently through detail reports.



PROJECT PORTFOLIO MANAGEMENT

Effectively supervise projects, better organization, tracking, and delivery of project milestones.

TASK MANAGEMENT



Simplifies dragging & dropping tasks into various team member schedules.



Change status and plans easily for each task



Facilitates prioritization and helps keep projects on track



Visualize task status on Table, Kanban, and Resource Scheduler views

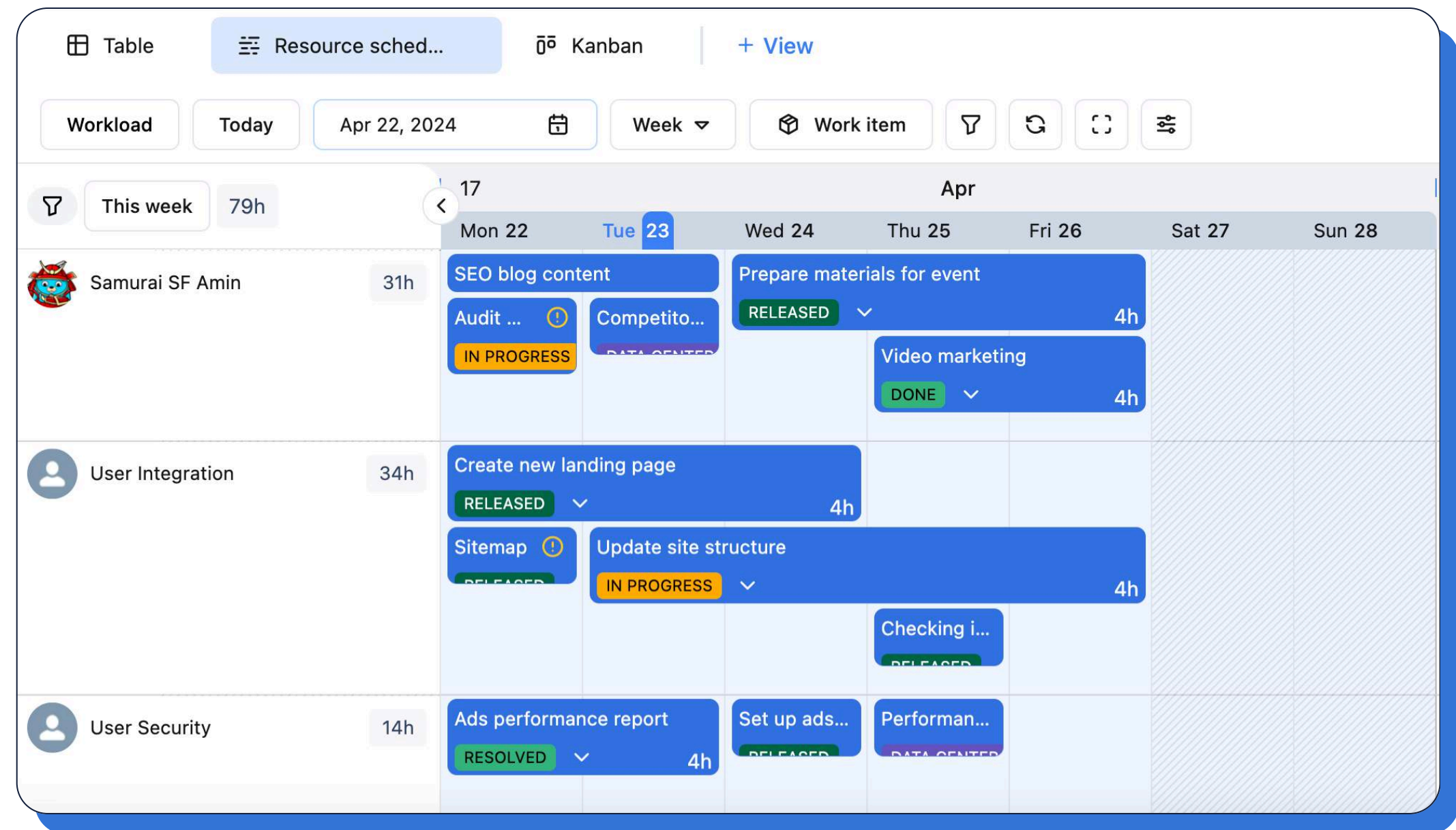
The screenshot displays the TeamBoard application interface. The top navigation bar includes "TeamBoard", "Work", "Time Tracking", "Report", "Settings", and "Team". The left sidebar shows a navigation menu with "Overview", "Favorites", "Work Zone", "Portfolio", and "New work board". The main content area is titled "21/21 Items" and shows a table of tasks. The table has columns for "#", "Name", "Assignee", "Status", "Priority", "Color", and "Start Date". The tasks are listed in descending order of start date.

#	Name	Assignee	Status	Priority	Color	Start Date
1	SEO blog content	Samurai SF Amin	RELEASED			04/22/2024
2	Audit website SEO technical	Samurai SF Amin	IN PROGRESS			04/22/2024
3	Competitor Research	Samurai SF Amin	DATA CENTER I...			04/23/2024
4	Prepare materials for event	Samurai SF Amin	RELEASED			04/24/2024
5	Video marketing	Samurai SF Amin	DONE			04/25/2024
6	Create new landing page	User Integration	RELEASED			04/22/2024
7	Update site structure	User Integration	IN PROGRESS			04/23/2024
8	Sitemap	User Integration	RELEASED			04/22/2024
9	Checking index page	User Integration	RELEASED			04/25/2024
10	Ads performance report	User Security	RESOLVED			04/22/2024
11	Set up ads campaign	User Security	RELEASED			04/24/2024
12	Performance tracking	User Security	DATA CENTER I...			04/25/2024
13	Document release	Tester No1 (standard u...	TO DO			04/22/2024

RESOURCE MANAGEMENT



- ✓ Set specific capacity hours to define working hours for each team member
- ✓ Plan for non-working days, ensure realistic project timelines.
- ✓ All-in-One solution to allocate & track employees, equipment, and budget
- ✓ Capacity & scheduled hours calculations to ensure no team member is overwhelmed or under-challenged



TIME TRACKING



- ✓ Syncing time tracking data with project estimates in Salesforce fields
- ✓ Sync with salesforce work logs, ensuring consistency across both platforms
- ✓ Comparing capacity hours, scheduled hours, and time spent in reports
- ✓ Allowing users to record time spent on specific tasks with precision & clarity

TeamBoard						
Work Time Tracking Report Settings Team						
+ Work Log My timesheet Team Table Stack Select 2024-03-11 - 2024-03-17 Export						
Items	Mon Mar 11	Tue Mar 12	Wed Mar 13	Thu Mar 14	Fri Mar 15	
10 Items	3 Work Logs	2 Work Logs	2 Work Logs	2 Work Logs	1 Work Log	1 W
11 Work Logs	11h	8h	8h	7h	8h	
Total 2d 2h						
User Training and Adoption 2 Work Logs 10h	10h	+	+	+	+	
Define project objectives and scope. 1 Work Log 1h	1h	+	+	+	+	
Cleanse data for duplicates and inaccuracies 1 Work ... 1h	+	1h	+	+	+	
Define criteria for lead scoring with sales team. 1 Work ... 7h	+	7h	+	+	+	
EEQQ 1 Work Log 1h	+	+	1h	+	+	
Data Migration and Integrity 1 Work Log 7h	+	+	7h	+	+	
Prepare a data mapping guide for migration. 1 Work L... 6h	+	+	+	6h	+	
Conduct a pilot data migration and validate. 1 Work L... 1h	+	+	+	1h	+	
Create documentation on lead scoring process. 1 Work ... 8h	+	+	+	+	8h	
Set up a knowledge base for 1 Work Log 8h	+	+	+	+	+	

REPORTING



Allowing to identification of potential bottlenecks or resource constraints with reports.



Create detailed reports to analyze performance and communicate results effectively.



Customizable reports depend on your strategies.



Lock, edit, and export your report effortlessly

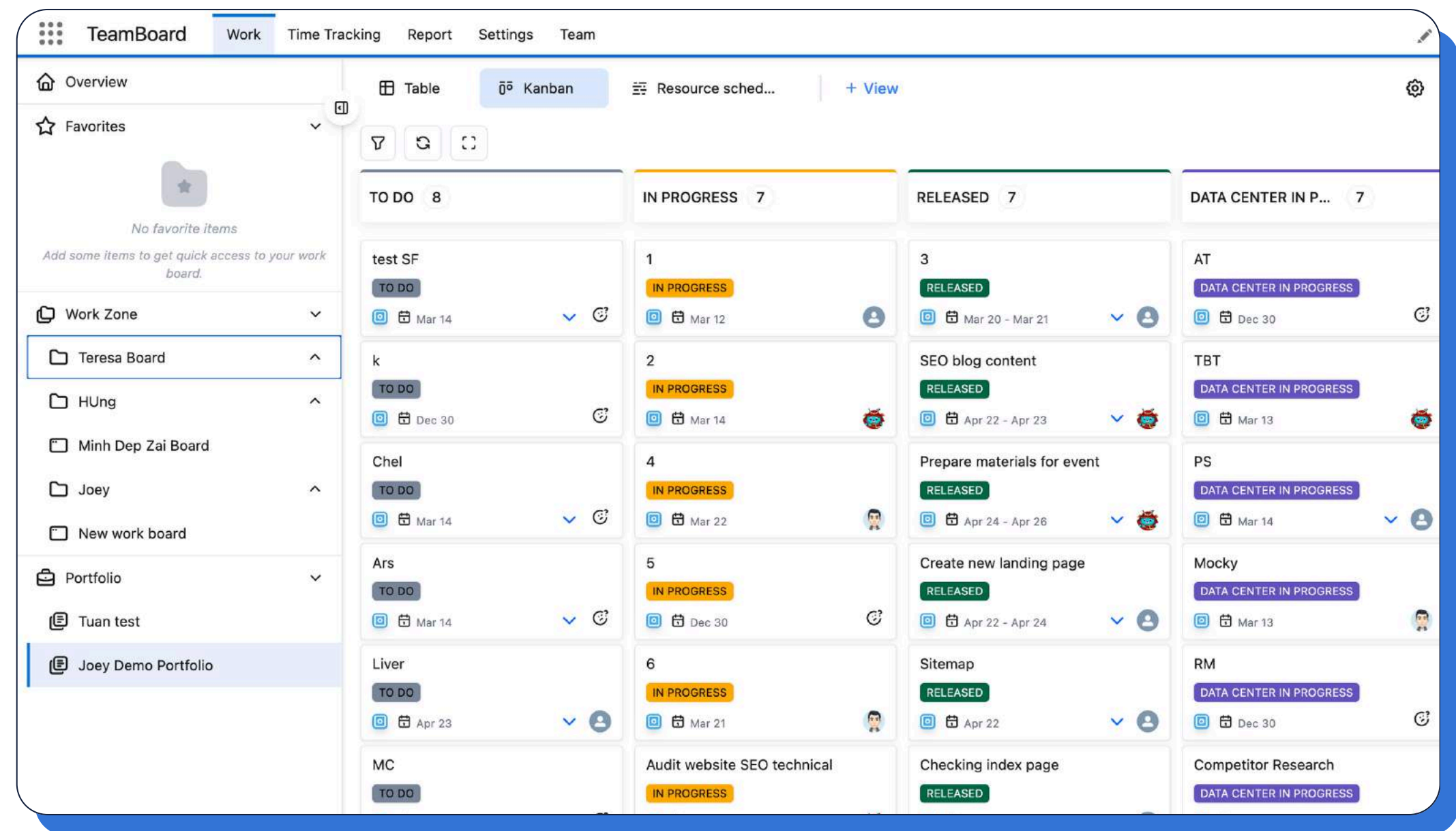
A screenshot of the TeamBoard web application. The top navigation bar includes "TeamBoard", "Work", "Time Tracking", "Report" (which is highlighted), "Settings", and "Team". A search bar is on the right. Below the navigation bar, there's a "Brian Report" section with a table of tasks. Above the table, there are buttons for "Lock", "Edit", "Export", and "Delete". A red arrow points from the "Report" tab to the "Lock" button. The table has columns for Name, Work board, Assignee, Status, Priority, Start Date, Due Date, and Scheduled Hours.

Name	Work board	Assignee	Status	Priority	Start Date	Due Date	Scheduled Hours
hehe	Lam board	Brian	TO DO	Low	Mar 14, 2024	Mar 14, 2024	
User Training and Adoption	Sales and CRM	Brian	DONE	Low	Mar 18, 2024	Mar 18, 2024	8
Identify and document sources of existing customer data	Sales and CRM	Brian		High	Mar 14, 2024	Mar 15, 2024	8
Data Migration to Salesforce	Sales and CRM	Brian	TO DO	Low	Mar 15, 2024	Mar 15, 2024	8
Execute full data migration and perform post-migration audit.	Sales and CRM	Brian	TO DO	Low	Mar 20, 2024	Mar 22, 2024	8
Create user guides and documentation	Sales and CRM	Brian	TO DO	Low	Mar 19, 2024	Mar 19, 2024	8
Story 5	Hung board	Brian	DATA CENTER IN PROGRESS - IN PROGRESS	Low	Mar 11, 2024	Mar 11, 2024	
Implement Lead Scoring	Sales and CRM	Brian		Low	Mar 13, 2024	Mar 13, 2024	8

PROJECT PORTFOLIO MANAGEMENT



- ✓ Manage multiple projects on Table, Kanban, and Resource Scheduler view
- ✓ Track and manage project timelines with project portfolio management
- ✓ Comprehensive reporting to track & analyze individual & team performance
- ✓ Manage teams and set up board permission easily





UNIQUE SELLING POINT

TeamBoard for Salesforce stands out with its seamless integration & comprehensive resource management, making it the ultimate solution for efficient and effective project management



User-friendly Interface

TeamBoard is proud of a user-friendly interface that is easy to navigate and intuitive to use, ensuring quick adoption and minimal training requirements for users at all levels of expertise.



Advanced Reporting and Analytics

TeamBoard offers advanced reporting and analytics capabilities, providing valuable insights and empowering stakeholders to make informed decisions and drive project success.



Comprehensive Resource Management

TeamBoard provides comprehensive resource management tools, including drag-and-drop planning, capacity hours tracking, and skill-based task assignment, enabling efficient allocation and utilization of resources.



Scalability and Adaptability

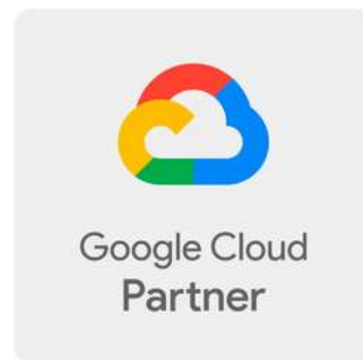
TeamBoard is designed to scale alongside growing businesses, offering the flexibility and adaptability to accommodate changing requirements and complex project environments.



Achievements

TeamBoard is developed by **DevSamurai**, a renowned software development company known for its expertise in creating innovative and reliable solutions for project management.

Proud To Be Partner Of



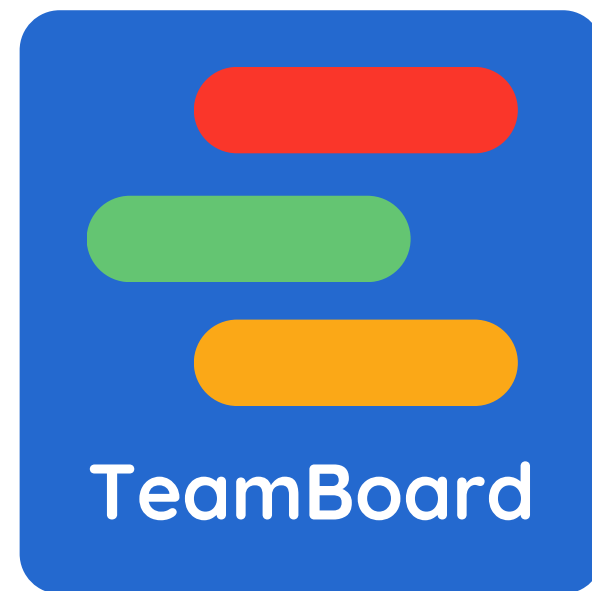
SOC 2 Type II Compliance

3.400+ installs on Atlassian Marketplace

Google Cloud infrastructure

2.900+ installs on monday Marketplace

THANK YOU



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trust.devsamurai.com