Cloud T&E Installation

Pre-installation Steps

There are no pre-installation steps for Cloud T&E

Post-installation Steps

The following are post installation steps. As part of your subscription, you may elect to have Accorto assist you in the completion of these tasks. You must be logged in with a System Administrator user to complete these steps. Detailed step by step instructions can be accessed in the appropriate links or from the Help menu directly.

Required Steps

The following actions are required to complete your installation of Accorto Cloud T&E.

Optional Steps

The following actions are optional.

To allow access to sample Chart of Accounts from Google docs
- Define Remote Site http://spreadsheets.google.com

Remote Sites Steps

Page Layout changes

To allow creation of T&E Items from Activities and Tasks:
- Add the fields T&E Hours and T&E Amount to the appropriate page layouts.
- Add Button Create T&E Item to the appropriate page layouts

Update Page Layouts Steps

Overdue Alerts

To allow enable the generation of Alerts if a T&E report is overdue define actions for the following workflow rules. Note you must have defined T&E Report frequency in at least 1 financial organization for the alerts to be triggered.

Overdue T&E Item

- Add Time Trigger
- Add Time Dependant Workflow Actions : Select Existing Action or create a new one.

Overdue T&E Report

- Add Time Trigger
- Add Time Dependant Workflow Actions : Select Existing Action or create a new one.

[Overdue Alerts Steps](#)

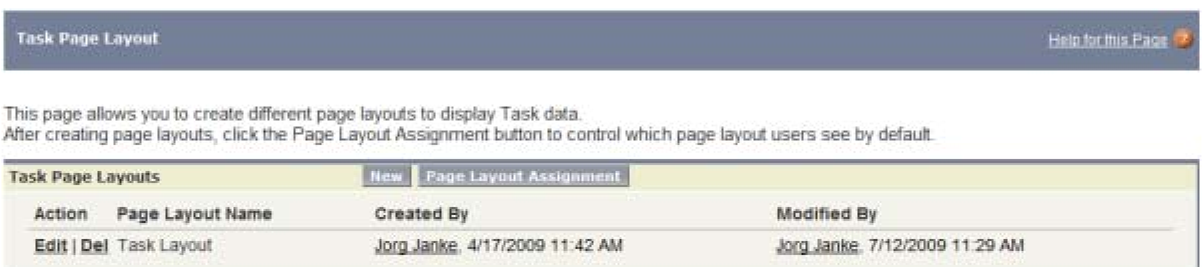
Page Layouts

Certain functions within Accorto Cloud applications require buttons and fields to be added to existing page layouts. You must be logged in as System Administrator to complete these tasks.

Allow creation of T&E Items from Tasks and Events

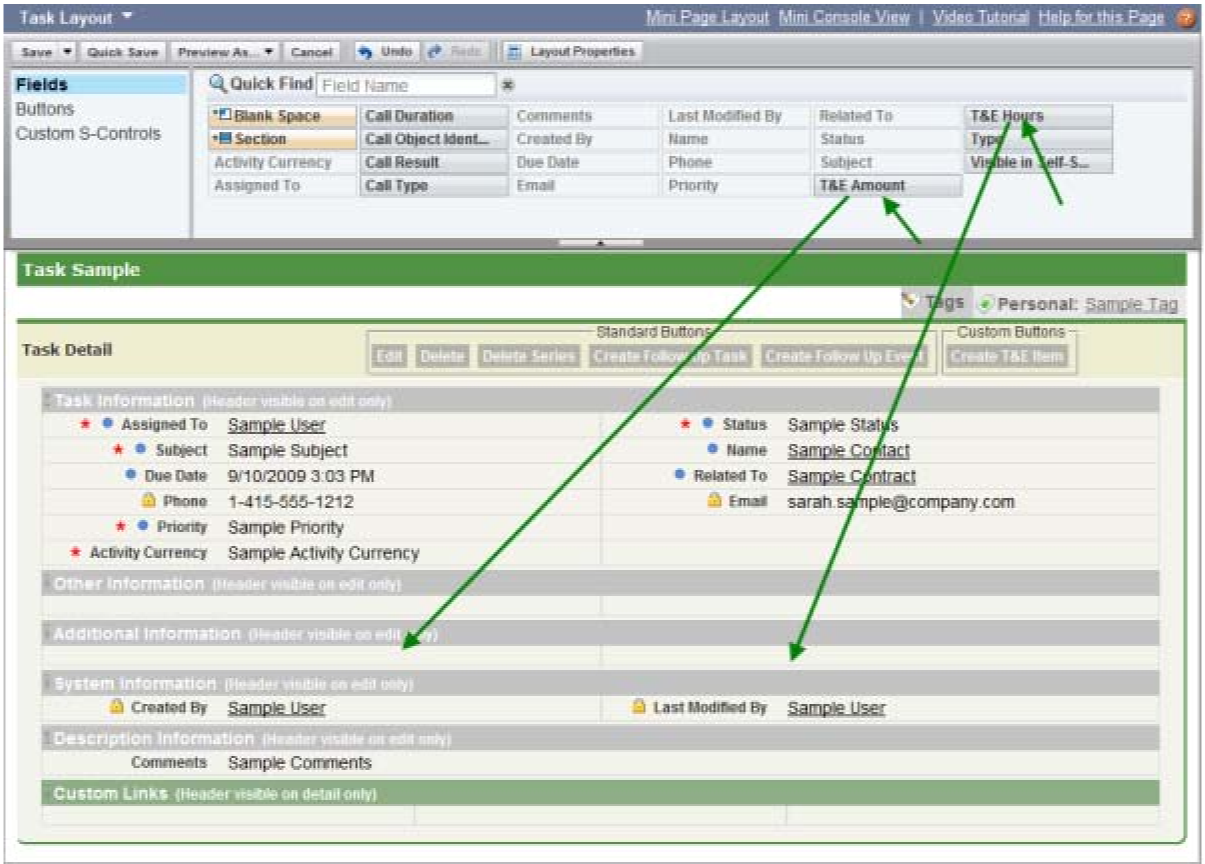
To allow creation of T&E Items from Cases, Activities, Tasks and Events you must add the fields T&E Hours and T&E Amount to the appropriate page layouts.

Navigate to App Setup > Customize > Activities > Page Layouts



- Click Edit

Note: Depending on your Salesforce CRM setup, you may have multiple page layouts. Perform the same steps for each page layout as appropriate.



- Click on T&E Amount in the field section at the top and drag it to the Additional Information section of the page layout.

- Repeat this for T&E Hours

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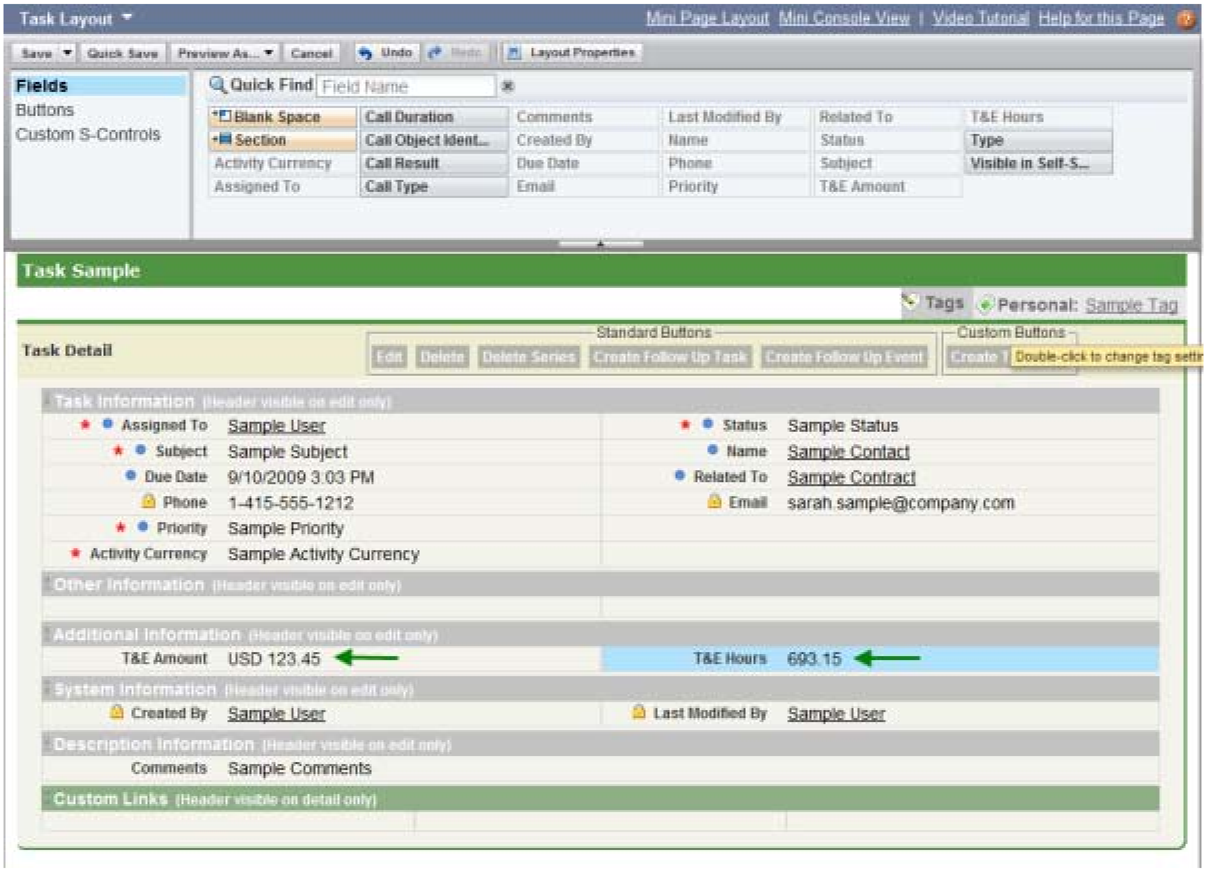
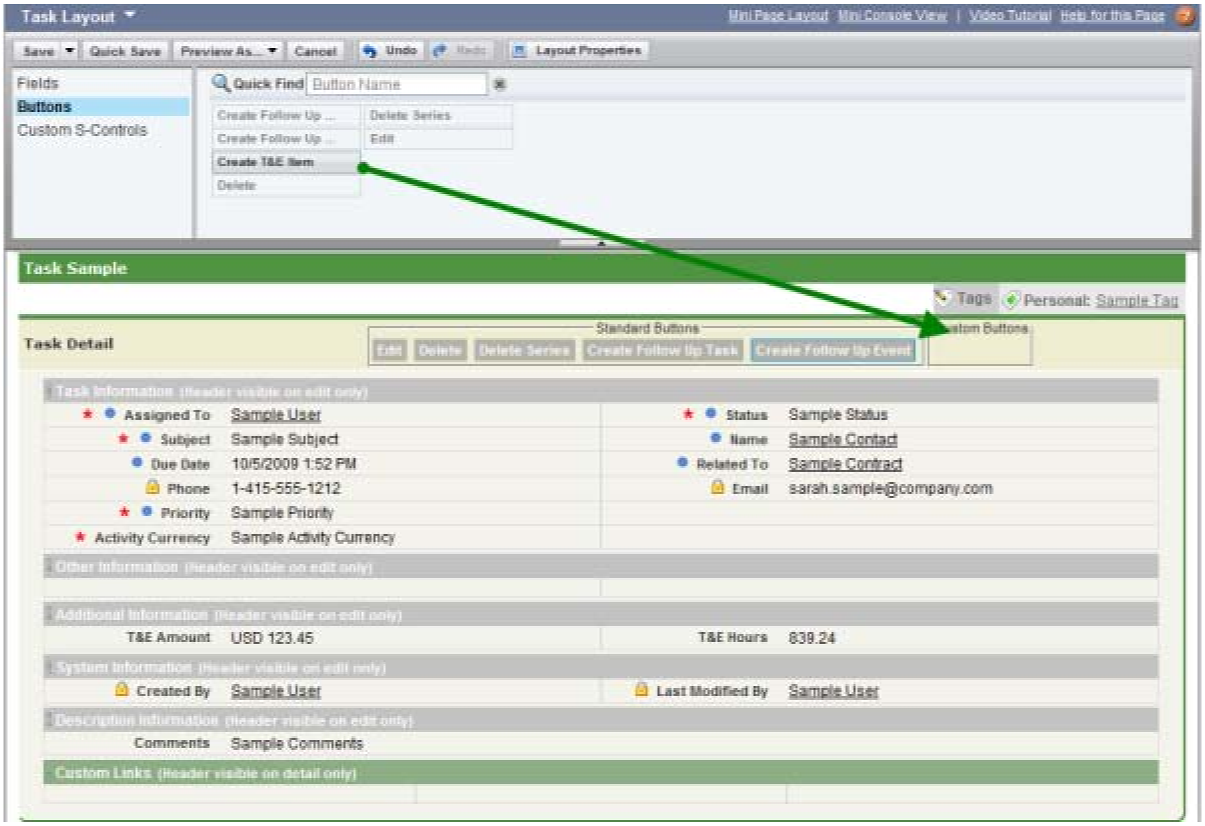
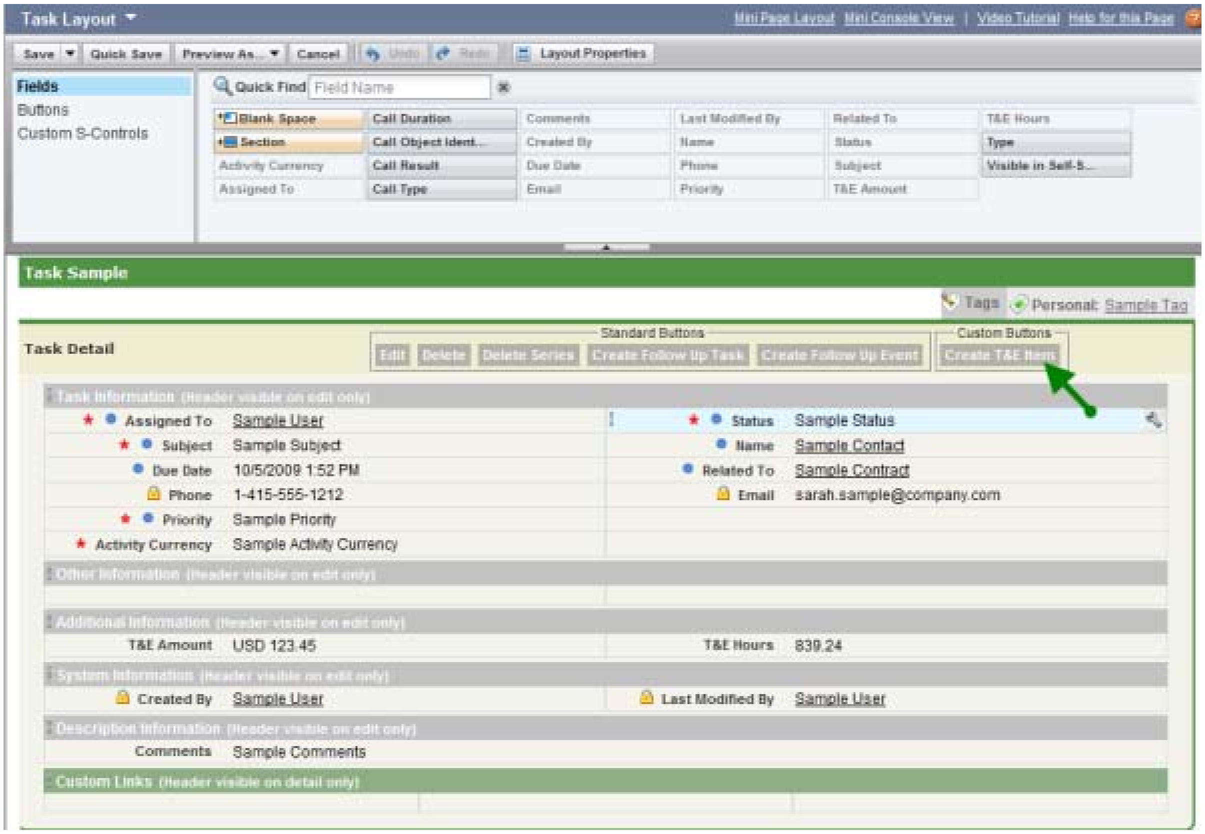


- Click Buttons in the upper left section of the form.



Click on the Create T&E Items button and drag it to the Custom Buttons section of the Page Layout



- Click the Save button to save the changes to the Page Layout

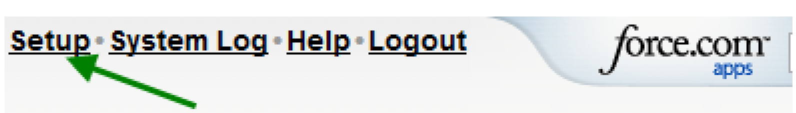
Repeat these steps for Activity - Event Page Layouts and Activity - Task Page Layouts as appropriate.

Remote Sites

Remote Sites settings allow users to access external or remote sites directly from Salesforce. You must be logged in as System Administrator to complete these tasks.

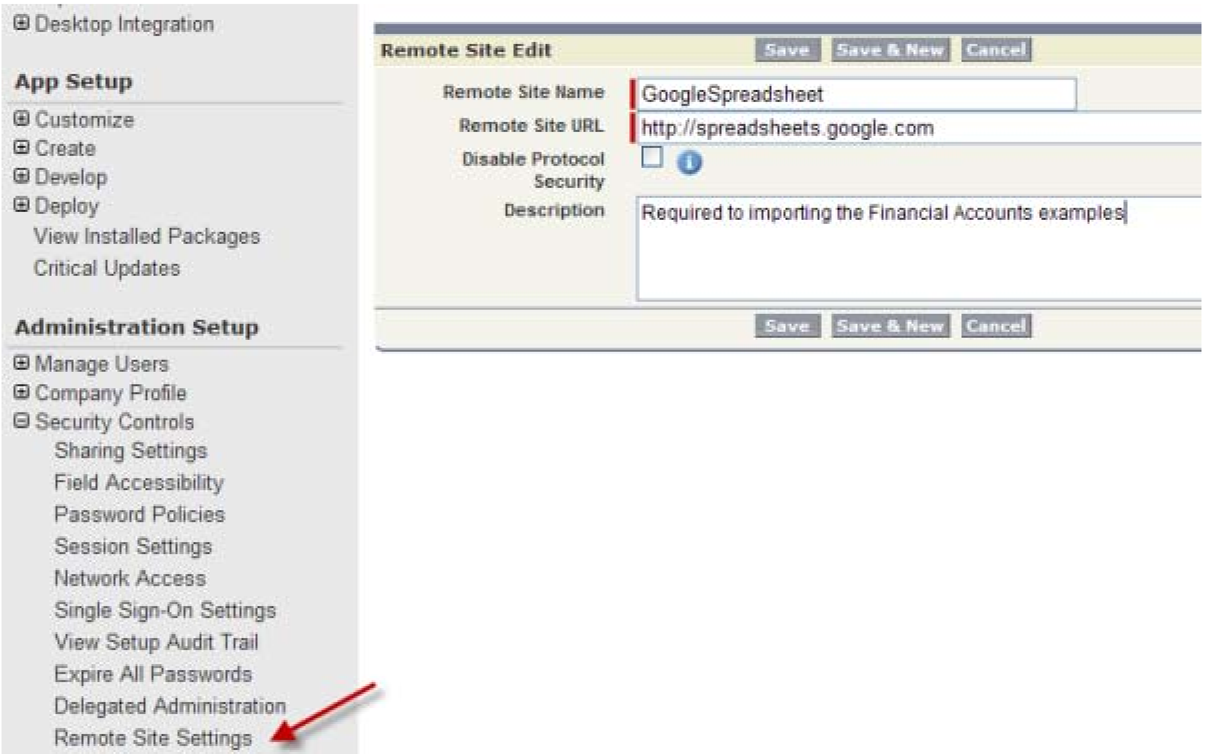
To access the sample Financial Accounts .csv file you must allow access from salesforce to google docs (this is the remote site).

From the main Salesforce window select Setup.



Navigate to Administration Setup > Security Controls > Remote Sites

- Click the New Remote Sites button



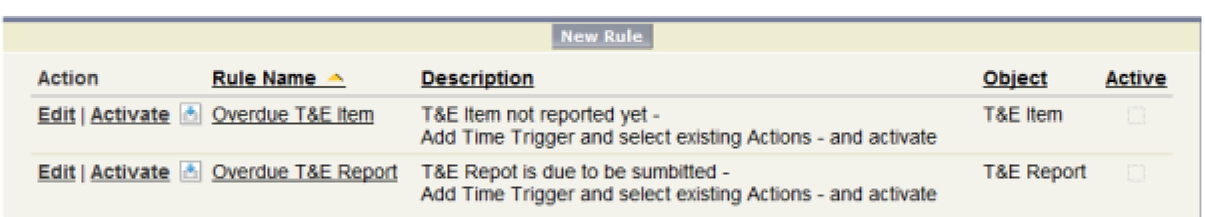
- Enter a Remote Site Name of 'Google Spreadsheets'
- Enter a Remote Site url of http://spreadsheets.google.com
- Enter a description (if desired)
- Click Save

Alerts

In Accorto, if a Report Frequency (for time and/or expenses) has been defined you can enable alerts to be sent when a report is overdue. Report frequency is defined for each [Financial Organization](#).

The necessary Workflow Rules for the Alerts have been created. This following steps describe how to activate and customize these rules for your business needs. You must be logged in as System Administrator to complete these tasks.

Navigate to Setup > App Setup > Create > Workflow & Approvals > Workflow Rules



New Rule

Action	Rule Name	Description	Object	Active
Edit | Activate	Overdue T&E Item	T&E Item not reported yet - Add Time Trigger and select existing Actions - and activate	T&E Item	
Edit | Activate	Overdue T&E Report	T&E Repot is due to be sumbitted - Add Time Trigger and select existing Actions - and activate	T&E Report	

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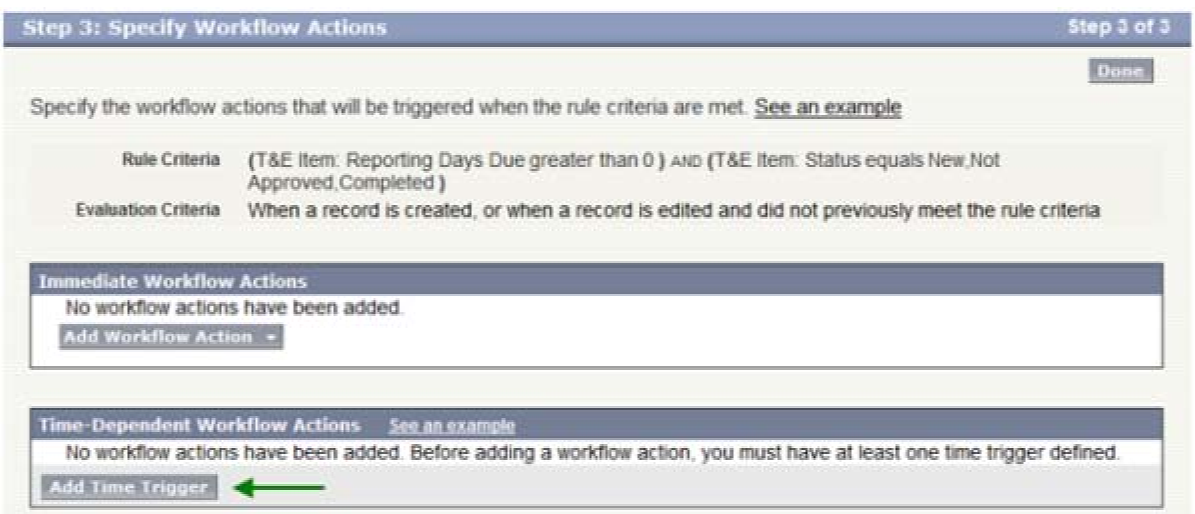
Click the Overdue T&E Item Rule Name.

Note: if the Rule is Active you must Deactivate prior to updating.

Click the Edit button in the Workflow Actions section



Click the Add Time Trigger button in the Time Dependent Workflow section.

Enter the desired number of days after the T&E due date when the alert should be sent.

Repeat this process for the Overdue T&E Reports Rule

Activate the Workflow Rules.