



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

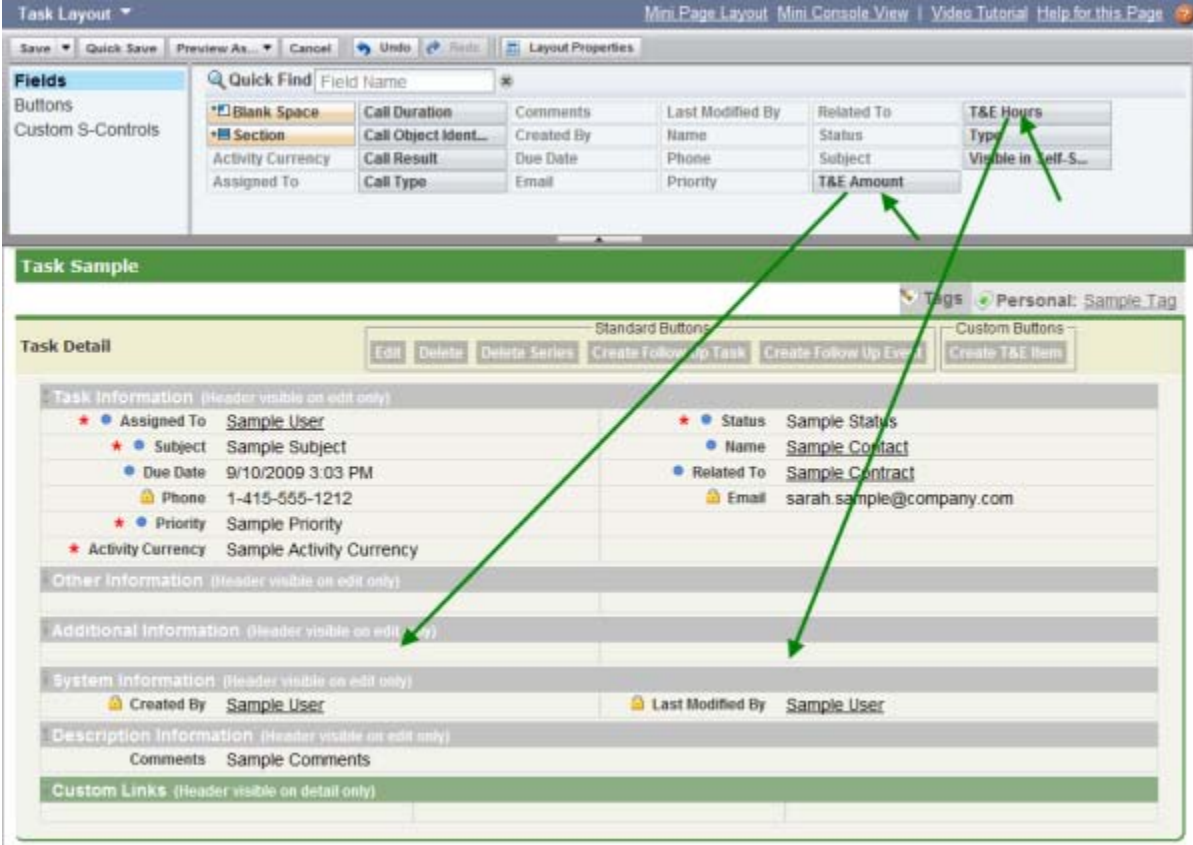
To allow creation of T&E Items from Cases, Activities, Tasks and Events you must add the fields T&E Hours and T&E Amount to the appropriate page layouts.

Navigate to App Setup > Customize > Activities > Page Layouts

Action	Page Layout Name	Created By	Modified By
Edit Del	Task Layout	Jorg Janke 4/17/2009 11:42 AM	Jorg Janke 7/12/2009 11:29 AM

- 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.



The screenshot shows the 'Task Layout' editor interface. At the top, there's a 'Fields' section with a 'Quick Find' bar and a list of fields including 'Call Duration', 'Call Object Ident...', 'Activity Currency', 'Assigned To', 'Call Result', 'Call Type', 'Comments', 'Created By', 'Due Date', 'Email', 'Last Modified By', 'Name', 'Phone', 'Priority', 'Related To', 'Status', 'Subject', 'T&E Amount', 'T&E Hours', 'Type', and 'Visible in Self-S...'. Below this is the 'Task Sample' section, which contains a 'Task Detail' form. The 'Task Detail' form has several sections: 'Task Information', 'Other Information', 'Additional Information', 'System Information', 'Description Information', and 'Custom Links'. The 'Additional Information' section is currently empty. Two green arrows indicate the process of dragging the 'T&E Amount' and 'T&E Hours' fields from the 'Fields' section into the 'Additional Information' section.

- 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

Task Layout ▾ [Mini Page Layout](#) [Mini Console View](#) | [Video Tutorial](#) [Help for this Page](#)

Save ▾ Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons
Custom S-Controls

Quick Find:

Blank Space	Call Duration	Comments	Last Modified By	Related To	T&E Hours
Section	Call Object Ident...	Created By	Name	Status	Type
Activity Currency	Call Result	Due Date	Phone	Subject	Visible in Self-S...
Assigned To	Call Type	Email	Priority	T&E Amount	

Task Sample

Tags: Personal: Sample Tag

Standard Buttons: Edit Delete Delete Series Create Follow Up Task Create Follow Up Event

Custom Buttons: Create Double-click to change tag settings

Task Detail

Task Information (Header visible on edit only)

Assigned To	Sample User	Status	Sample Status
Subject	Sample Subject	Name	Sample Contact
Due Date	9/10/2009 3:03 PM	Related To	Sample Contract
Phone	1-415-555-1212	Email	sarah.sample@company.com
Priority	Sample Priority		
Activity Currency	Sample Activity Currency		

Other Information (Header visible on edit only)

Additional Information (Header visible on edit only)

T&E Amount	USD 123.45	T&E Hours	693.15
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System Information (Header visible on edit only)

Created By	Sample User	Last Modified By	Sample User
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Description Information (Header visible on edit only)

Comments	Sample Comments
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Custom Links (Header visible on detail only)

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

Task Layout ▾ Mini Page Layout Mini Console View Video Tutorial Help for this Page

Save ▾ Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons

Custom S-Controls

Quick Find Button Name

Create Follow Up ... Delete Series

Create Follow Up ... Edit

Create T&E Item

Delete

Task Sample

Tags Personal: Sample Tag

Task Detail

Standard Buttons

Edit Delete Delete Series Create Follow Up Task Create Follow Up Event

Custom Buttons

Task Information (Header visible on edit only)

★ Assigned To	Sample User	★ Status	Sample Status
★ Subject	Sample Subject	★ Name	Sample Contact
★ Due Date	10/5/2009 1:52 PM	★ Related To	Sample Contract
★ Phone	1-415-555-1212	★ Email	sarah.sample@company.com
★ Priority	Sample Priority		
★ Activity Currency	Sample Activity Currency		

Other Information (Header visible on edit only)

Additional Information (Header visible on edit only)

T&E Amount	USD 123.45	T&E Hours	839.24
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System Information (Header visible on edit only)

Created By	Sample User	Last Modified By	Sample User
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Description Information (Header visible on edit only)

Comments	Sample Comments
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Custom Links (Header visible on detail only)

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



The screenshot shows the Accorto Task Layout editor. At the top, there's a 'Task Layout' dropdown and a 'Mini Page Layout' button. Below this is a 'Fields' section with a 'Quick Find' box and a table of fields. The 'Task Sample' section is highlighted in green. Below it, the 'Task Detail' section is expanded, showing various fields and buttons. A green arrow points to the 'Create T&E Item' button in the Custom Buttons section.

Field Name	Field Name	Field Name	Field Name	Field Name	Field Name
Blank Space	Call Duration	Comments	Last Modified By	Related To	T&E Hours
Section	Call Object Ident...	Created By	Name	Status	Type
Activity Currency	Call Result	Due Date	Phone	Subject	Visible in Self-S...
Assigned To	Call Type	Email	Priority	T&E Amount	

Task Sample

Tags: Personal: Sample Tag

Task Detail

Standard Buttons: Edit, Delete, Delete Series, Create Follow Up Task, Create Follow Up Event, Create T&E Item

Custom Buttons: Create T&E Item

Task Information (Header visible on edit only)

Assigned To	Sample User	Status	Sample Status
Subject	Sample Subject	Name	Sample Contact
Due Date	10/5/2009 1:52 PM	Related To	Sample Contract
Phone	1-415-555-1212	Email	sarah.sample@company.com
Priority	Sample Priority		
Activity Currency	Sample Activity Currency		

Other Information (Header visible on edit only)

Additional Information (Header visible on edit only)

T&E Amount	USD 123.45	T&E Hours	830.24
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System Information (Header visible on edit only)

Created By	Sample User	Last Modified By	Sample User
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Description Information (Header visible on edit only)

Comments	Sample Comments
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Custom Links (Header visible on detail only)

- 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. The 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 Report is due to be submitted - Add Time Trigger and select existing Actions - and activate	T&E Report	☐



Click the Overdue T&E Item Rule Name.

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

Workflow Rule
Overdue T&E Item (Managed) [Help for this Page](#)

[Back to List: Workflow Rules](#)

This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail [Clone](#) [Activate](#)

Rule Name	Overdue T&E Item	Object	T&E Item
Namespace Prefix	accorto	Evaluation Criteria	When a record is created, or when a record is edited and did not previously meet the rule criteria
Installed Package	Accorto Cloud Plus		
Active	☐		
Description	T&E Item not reported yet - Add Time Trigger and select existing Actions - and activate		
Rule Criteria	(T&E Item: Reporting Days Due greater than 0) AND (T&E Item: Status equals New,Not Approved,Completed)		
Created By	Kathy Pink , 9/4/2009 10:57 AM	Modified By	Kathy Pink , 9/4/2009 10:57 AM

Workflow Actions [Edit](#) 

Immediate Workflow Actions
No workflow actions have been added.

Time-Dependent Workflow Actions
No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Click the Edit button in the Workflow Actions section

Step 3: Specify Workflow Actions Step 3 of 3 [Done](#)

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	(T&E Item: Reporting Days Due greater than 0) AND (T&E Item: Status equals New,Not Approved,Completed)
Evaluation Criteria	When a record is created, or when a record is edited and did not previously meet the rule criteria

Immediate Workflow Actions
No workflow actions have been added.
[Add Workflow Action](#)

Time-Dependent Workflow Actions [See an example](#)
No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.
[Add Time Trigger](#) 

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



Add Time Trigger
T&E Item [Help for this Page](#)

Workflow Time Trigger Edit

Workflow Rule	Overdue T&E Item			
	10	Days ▾	After ▾	Rule Trigger Date ▾
Save Cancel				

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.