SalesMost

Salesmost PSA White Paper

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Ⅰ Product Introduction

What is a PSA

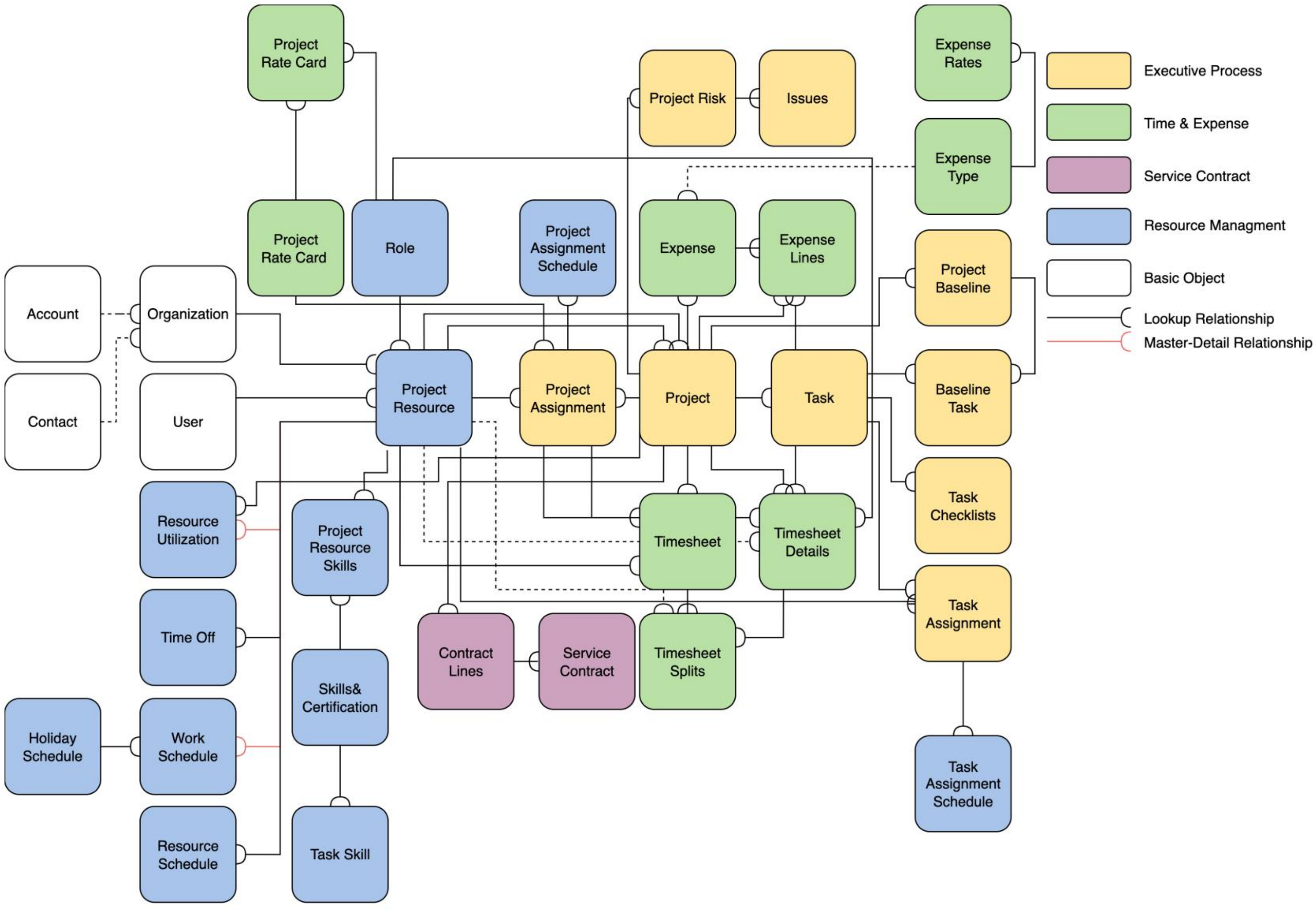
Professional Services Automation (PSA) is a software solution designed to coordinate and manage professional service teams, processes and projects. It integrates project management, resource management, time and expense tracking, and other functions to provide professional service companies with more efficient and transparent workflows and better customer experiences.
Unlike others, Salesmost PSA is 100% native to Salesforce. Provide reusable project management processes for non-profit organizations and other professional service enterprises.

Highlights

PROJECT MANAGEMENT
Streamline project execution with optimized planning. Track progress, allocate resources efficiently, and align projects with scope, time, and budget. Simplify repetitive processes using project templates and provide real-time insight into task progress using project baselines.
RESOURCE MANAGEMENT
Resource management for capacity planning, utilization monitoring & simple scheduling. Available Resource & skill seeker so the right person is being assigned.Centralize talents for streamlined staffing.
TIME & DELIVERY
Simplifies the tracking of revenue and cost for projects, while automatically pre-populating both billable and non-billable time and expense forms. Tracking project performance: see profit & margin vs actual profit & margin in clear dashboards or project detail.
ESTIMATED & FORECASTED & ACCOUNTING

Plan tasks, milestones, while providing real-time calculation of completion percentages and monitoring project health. It also offers predictions for required hours, costs, and income for project completion.

PSA Object



Ⅱ Getting Started with Salesmost

Project Management

Overview

Project management is one of the key features of Salesmost PSA, and at the center of it all is a custom object called the **Project**. In most cases, a majority of the actions you perform in Salesmost PSA will be based off a Project.

Prerequisites

User Permissions

To manage the project, the user needs to be added to one of the following permission groups:

- Salesmost User
- Salesmost Admin

Create Project

Overview

Projects are adaptable, they can be internal or customer-facing, billable or not billable. They have a large number of fields where you can add as much information as you need to improve your work efficiency.
You can think of the Project as a box where you store every element related to your project. This box has many "compartments" – for tasks, assignments, worked hours, expenses, etc. What you put inside the box is entirely up to you.
We will look at every component of the project in later chapters. For now, let's focus on creating a new Project.

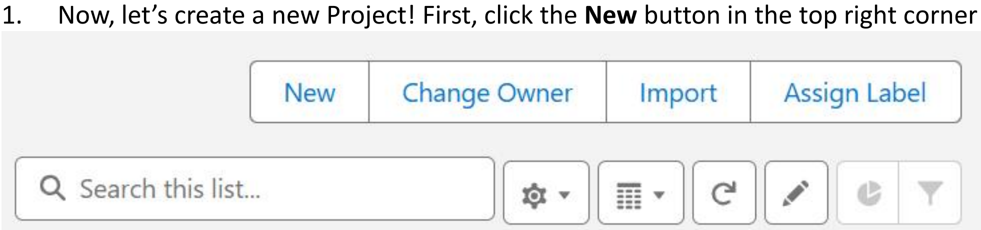
Navigate to Projects

Access the Projects tab via the App Launcher:

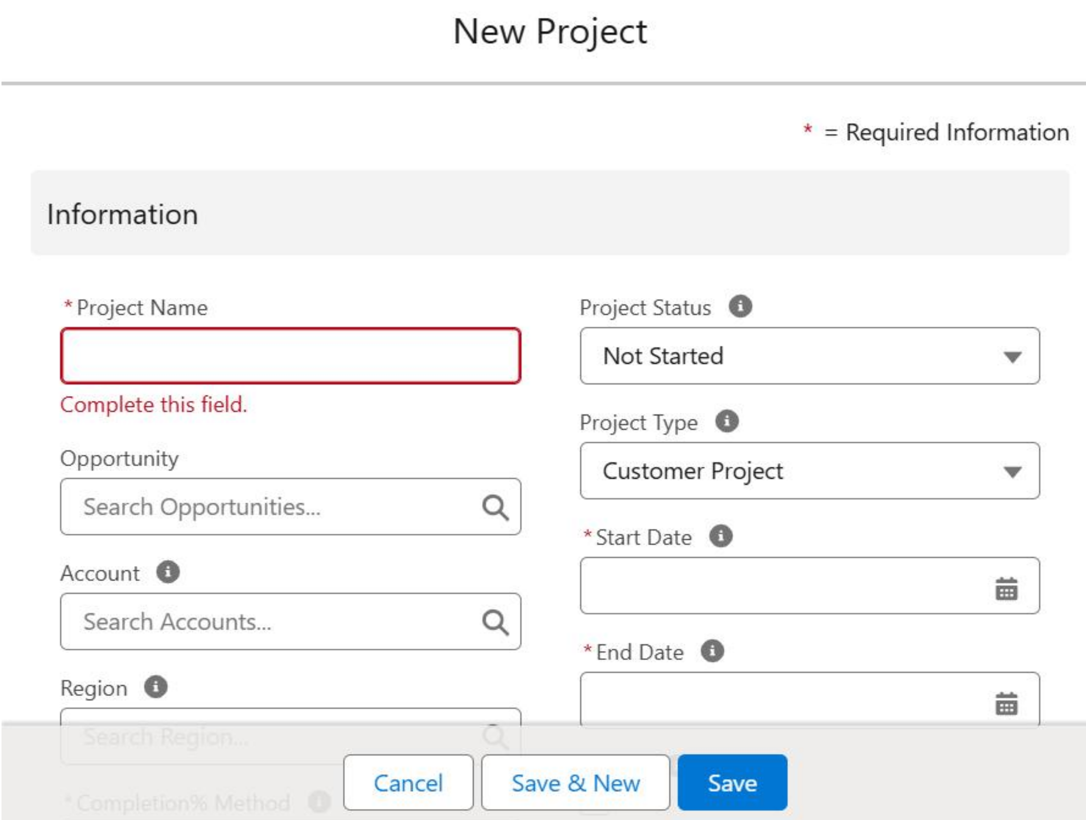
1. Click the **nine dots icon**  in the top left corner to open the **App Launcher**.
2. Type in the search bar.
3. In the search results, under **Items**, select **Projects**.

Create a Project

1. Now, let's create a new Project! First, click the **New** button in the top right corner of the Projects tab:



2. You will be taken to the **New Project form** screen:



Note: The fields described in this article are part of the default fieldset controlling the New Project form that is created for you

when you first install Salesmost PSA. Your System Administrator can customize this fieldset. As a result, the fields you see may vary from this list.
Here, you can fill in all the fields that are relevant to your project:

- **Project Name:** This will be used to identify the project throughout the platform, so make sure to pick a meaningful name. As a best practice, we recommend including the name of the customer in the project name (or a meaningful abbreviation of it). This is particularly helpful when you have projects with similar names.
    - Project Name is the only **mandatory field** on this page. All other fields below are optional and can be edited later.
- **Project Owner:** By default, the Project Resource associated with the logged-in user will be defined as Owner, but you can select a different Project Resource by typing their name.
- **Account:** Select the customer associated with this project.
- **Project Type:** The two default options of this customizable picklist are **Internal** and **Customer**.
- **Billable:** If you check this box, you will be able to generate and send invoices to the customer selected under **Account**.
- **Rate Card:** Select a Project Rate Card that sets the different Bill Rates for the various roles Project Resources can have on this project.
    - The project rate card is created to guide the resource rates used for project dispatch and reporting of work hours, used to calculate costs and revenue.
    - When calculating costs and revenue, priority will be given to using the rates on the rate cards associated with the project, followed by using the rates of project resources.
    - To learn more, read our help article on Project Rate Cards.
- **Currency:** Select the currency for all amounts within this Project.
- **Project Start Date:** Indicate when the work on the project is expected to start. This is the date on which the assigned Project Resources will be able to start logging time on their timesheets.
- **Project Status:** By default, this field will be set to **Not Started**, but you can pick a different value here.When the project completion percentage is 100%, the project status is completed.
- **Description:** Enter some information to help Users understand the nature and scope of the project.
- **Estimated Hours:** Enter the number of work hours the project is expected to take to complete. This will come in useful when creating Project Assignments and tracking progress.
- **Estimated Revenue:** Enter the estimated revenue of this project.
- **Estimated Cost:** Enter the estimated cost of this project.
- **Estimated Budget:** Enter the estimated Budget of this project.

When you are ready, click **Save** in the top right corner to create your Project.
Once the project is created, you will be taken to the Project page, from where you will be able to add tasks and assign Project Resources.

Project Task

Overview

The best way to manage large projects is to break them down into smaller tasks. For example, if you have a project to design a new website for a client, you would divide it in smaller pieces such as designing the layout, writing the content, programming the backend, and so on, and having different team members assigned to each piece based on their skills and availability.
In Salesmost PSA, these smaller pieces are called **Project Tasks**. They are linked to a Project and represent specific actions to be performed to complete the project. You can create as many Project Tasks as you want within a Project. You can even create multiple levels of task groupings to represent the various deliverables and action items within a group of related tasks, or to group tasks into project phases, for example.
In the example above, you might create a Project named **New Website** and add a Project Task called **Layout Design**. Then, you could create subtasks of that Project Task for things like **Build a Site Map**, **Design the Navigation Menu**, **Create a Home Page Mock-Up**, and so on.
You can add Project Tasks to the Project you created using the **Project Gantt**, one of Salesmost's property interfaces. It is specifically designed to create and manage complex project structures that include task dependencies.
Read on to find out how to view your Project in the Gantt and create Project Tasks from that interface.

Prerequisites

User Permissions

To create a Task, Users need to be added to one of the following Permission Set Groups:

- Salesmost User
- Salesmost Admin

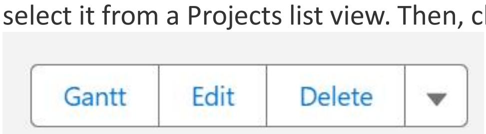
Existing Data

In order to use the Project Gantt, you will need access to at least one active Project.

Navigate to the Project Gantt

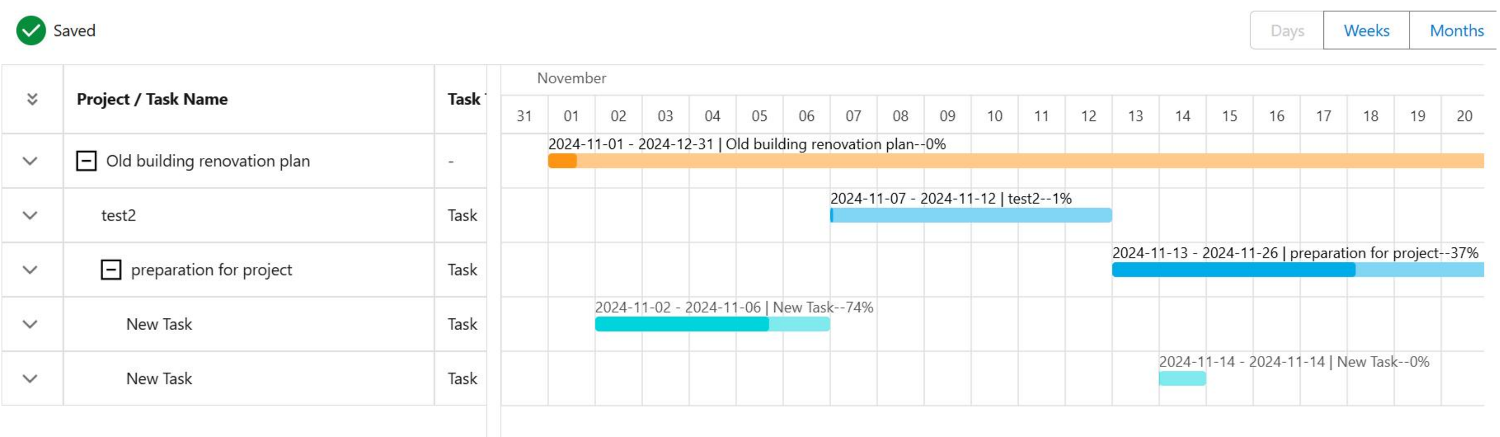
The **Project Gantt** is a highly customizable interface that allows you to manage your Project's tasks and track their progress. With its intuitive click-and-drag design, you can easily organize your work the way you like it without navigating through multiple screens.

The Project Gantt is available from any **Project detailed page**. To open a project, simply type its name in the search bar or select it from a Projects list view. Then, click the **Gantt button** in the toolbar:



The Project Gantt displays the data that resides in records linked to your project, such as Tasks. This means that if you create, delete or edit tasks from the Gantt , the changes will be saved to these records and reflected everywhere in your system.

> **Note:** When you make a change on the Gantt , make sure to wait until the green checkmark icon appears in the top left corner before changing anything else. Any edits made before a prior edit is confirmed might not save properly.



Create Project Tasks

There are two ways to create a new Task from the Gantt :

1. Click the **down arrow** next to a project to creat a task.
2. Click the **down arrow**  next to a project Task to create a **subtask** directly under this task. *(We will talk about subtasks later in this article.)*

Next, you can fill in the task related information, and save it. Repeat this process to create as many Tasks as you need.

- **Project Task Name:** A brief summary of the representative task content.
- **Task Type:** Many default options of this customizable picklist are **Task, Event, Story, Story Bug, Epic, Bug, Control, Milestone**.
- **Estimated Hours:** Enter the number of work hours the task is expected to take to complete. This will come in useful when creating Task Assignments and tracking progress.
- **Billable:** If you check this box, the customer will have to pay for this task.
- **Start Date:** Indicate when the work on the task is expected to start. The date of the task must be later than the start date of the project.
- **Due Date:** Indicates that the task cannot end later than this time.

Parent Tasks and Subtasks

In the Gantt, Project Tasks are presented as a set of cascading folders and subfolders representing the hierarchy of tasks and subtasks. The Project, in the top row, is the root folder. All the other elements in the grid are your Tasks. This hierarchy also forms what is commonly called the project's **Work Breakdown Structure** (WBS), indicated in the leftmost column of the Gantt.

Parent tasks and subtasks are key elements of the Gantt. They help you visually organize your Project. If a task has subtasks, you will see a **+/- icon** . Click the symbol to expand or collapse the triangle and view or hide the subtasks it contains.

Parent tasks and subtasks are both Tasks. It is only the location of the task in the WBS that makes it a parent task, a subtask, or neither. Parent tasks, however, do have specific behaviors in the Gantt:

- You cannot manually set the **Start Date**, **Due Date**, or **Duration** of parent tasks. These fields are automatically driven by the dates and duration of the subtasks.
- If you change the status of a parent task to **Completed**, all of its subtasks are also automatically marked as completed.

A parent task also has values in multiple fields that sum up numbers from their subtasks, such as **Total Estimated Hours from Subtasks**.

Edit a Task

When you create a Task, you might notice that some fields are already populated. Also, if the Project is billable, it is automatically marked as Billable.

Wherever the data comes from, you can always edit it directly in the Task, provided that you have the appropriate user permissions. To edit a Task, simply click the down arrow icon on the right of the tasks list and click **Edit**:

This will open the Project Task Tab, where you can view and edit the Task's details.

Delete a Task

To delete a Task, simply click the down arrow icon on the right of the tasks list and click **Delete**.

> **Note:** You cannot delete a Task if one or more Timesheet entries have been logged against it. Only the Project Owner and Task Owner have the ability to delete a task.

Assign Project Resources

Overview

Once you have created your project and divided it into tasks, the next step is to assign each task to the relevant resource. Assignments help you define who works on what, and determine the projects and tasks each Project Resource can view, work with, and select when filling in their timesheets.

In this article, we will walk you through the fundamentals of Project Assignments and Task Assignments. Then, you will learn how to assign Project Resources to your Project Tasks from the Gantt.

Prerequisites

User Permissions

To assign a Project Resource to a Task, the user needs to be added to one of the following permission groups:

- Salesmost User
- Salesmost Admin

Existing Data

In order to assign a resource to a task, you will need the following data in your system:

- At least one active Project
- At least one active Project Task within that Project
- At least one active Project Resource with a Work schedule

What are Project Assignments and Task Assignments?

As their names indicate, Project Assignments are used to assign a Project Resource to a specific Project, and Task Assignments establish a link between a Project Resource and a Project Task record. While they both use key information from related records to generate schedules, Project Assignments are mostly used during the planning phase of a project when tasks haven't been defined yet. As such, we will focus on Task Assignments for now.

Working with Task Assignments

A Task Assignment is the association of a Project Resource to a Project Task. System automatically creates a Task Assignment record when you assign a resource to a task. This record contains all of the details of the assignment, such as the start and end date of the assignment, and the number of hours the resource is expected to work on the task.

When you assign a Project Resource to a task, System looks for an existing Project Assignment for that resource on the Project, and automatically creates one if it does not exist. A Project Assignment gives the specified Project Resource access to the Project, so the resource can view the project record, contribute to the project and log time against it.

You can assign multiple resources to a single task if the work requires more than one resource. You can also assign the same Project Resource to different Project Tasks within a project.

The **Role** and **Bill Rate** fields will auto-populate with the default values associated with this Project Resource; verify this information and change it as required.

- If there is a Project Rate Card associated with your project, you can select a different role from the Project Resource's default role and system will retrieve the Bill Rate associated with that role on the Project Rate Card and use it for this Task Assignment. The Project Resource, its Role and Bill Rate associated with a Project are saved in the Task Assignment record.

Example

Roxanne Green is taking the lead on your website design project. She will be working with Jenny Red, the solution architect, and Jules Birdie, the designer.

All three resources will be working together in the initial brainstorm, but then, tasks will be split among the team. Jenny will work on the back end, Jules will design the layout, and Roxanne will write the content.

Let's assume that the Project and related Tasks already exist in system. In this scenario, the following would be created :

- Three Project Assignment records related to the **website design Project**: one each for Roxanne, Jenny and Jules.
- Three Task Assignment records related to the **brainstorm Task**: one each for Roxanne, Jenny and Jules.
- One Task Assignment record related to the **back-end Task** for Jenny.
- One Task Assignment record related to the **designTask** for Jules.
- One Task Assignment record related to the **content writing Task** for Roxanne.

Assign Tasks to Project Resources

Repeat the '**Edit a Task**' section instructed above to enter the editing page of Tasks. You can see a Resource section at the bottom. You may assign anyone avalilable to the current task, and set a time schedule:

Task Side Panel & Schedule Tab

The Schedule tab lists existing Task Assignments. It also lets you assign additional Project Resources to the selected task, and modify the details of the existing assignments:

- The Owner checkbox indicates which Project Resource is the Task Owner. Check the box next to a different Project Resource to change the Task Owner.
- The Role is typically pulled from the resource's Project Assignment. This will define the Bill Rate used mwhen the resource logs time on that task.
  - A Project Resource can have more than one Project Assignment if they have multiple roles (typically with different Bill Rates) on a project. Click the role shown here to set a different one for Project Resources who have multiple Project Assignments.
- Click the Start Date or End Date fields to edit the dates of a resource's assignment.
  - The default values are the Task's Start Date and Due date, but you can pick different dates manually for each Project Resource by double-clicking the date you want to change.
  - The Task's Start Date and Due Date will automatically adjust based on the earliest Task Assignment Start Date and the latest Task Assignment End Date. This means that if you change the date range of an assignment, it might affect the Start Date or Due Date of the Task.
- You can enter values under Hours and % to schedule working hours for each Project Resource.
  - To enter a value, click the field, type the desired number and press Enter.
  - If you make a Task Assignment based on percentage, the hours will be calculated based on the Project Resource's Work Schedule in the defined date range.
  - If you make a Task Assignment based on hours, the percentage will be calculated based on the Project Resource's Work Schedule for the defined date range.
- Click the X icon next to a Task Assignment to delete it. You cannot delete a Task Assignment if the Project Resource is marked as Owner. You must switch ownership to a different Project Resource before deleting the assignment.

Type the name of a Project Resource in the Add Resource bar to create a new assignment.

Resource Management

Overview

A Project Resource record holds information about each resource involved in projects. Fields on the Project Resource control how the system handles that resource, such as the Active and External Resource checkboxes. Other fields such as Project Role, Bill Rate and Cost Rate are used to define the default values when the resource is assigned to projects.

A Project Resource is typically linked to a user, but you can create Project Resource for people who are not Salesforce Users. You'll still be able to add them to a project and even track Timesheets and other data for them.

You can create Placeholder resources to more accurately estimate your scope of work during the sales process, so that you don't commit workload to actual resources before you are certain that the project will be hapenning.

Before assigning tasks, project resources need to be created first. Use work schedule and Holiday schedule to specify the actual working hours of project resources. And skills can be added to each project resource. These are used to calculate resource utilization and allocate tasks to resources.

Prerequisites

User Permissions

To manage the project, the user needs to be added to one of the following permission groups:
- Salesmost User
- Salesmost Admin

Work Schedule & Holiday Schedule

The Work Schedule record houses the availability of the related Project Resource. It represents a standard working day and work pattern for this user, for scheduling purposes. More specifically, it allows you to determine the availabilities of the Project Resource for each day of the week, in hours.
A Project Resource should be associated with only one Work Schedule.
When assigning tasks to project resources, calculate the number of available hours based on the work schedule and Holiday Schedule. The daily dispatch hours displayed on the resource calendar are also allocated based on the actual working hours.

Bill Rate & Cost Rate

When a resource is assigned to a Task, System creates a Project Assignment if none previously existed for the parent Project. The Cost Rate and Bill Rate of the Project Resource are added to the Project Assignment record, and it's those rates that are used by default on any related Task to which the resource is later assigned, as well as on Timesheets.

> **Note:** If a project rate card is associated with the project, the Bill Rate on the task and timesheet will be based on the Bill Rate of the corresponding project rate card role.

Request Time Off

Overview

The **Time Off** object represents a period during which a resource is normally scheduled to work, but is exceptionally absent from work. It can include vacation, sick leave, parental leave, jury duty, or any other form of absence offered by your organization and defined as a Time Off Type in your system.
There are many reasons to log your time off in System. Not only does it provide a convenient process for resources to inform their managers of their intent to be absent from work, but it also updates relevant records such as your Timesheets and Resource Utilization, so that your worked hours and availability are always up to date in the system.
Just like Timesheets and Expenses, Time Offs are subject to your manager’s approval. Next, you will learn how to create a Time Off request and submit it for approval.

Existing Data

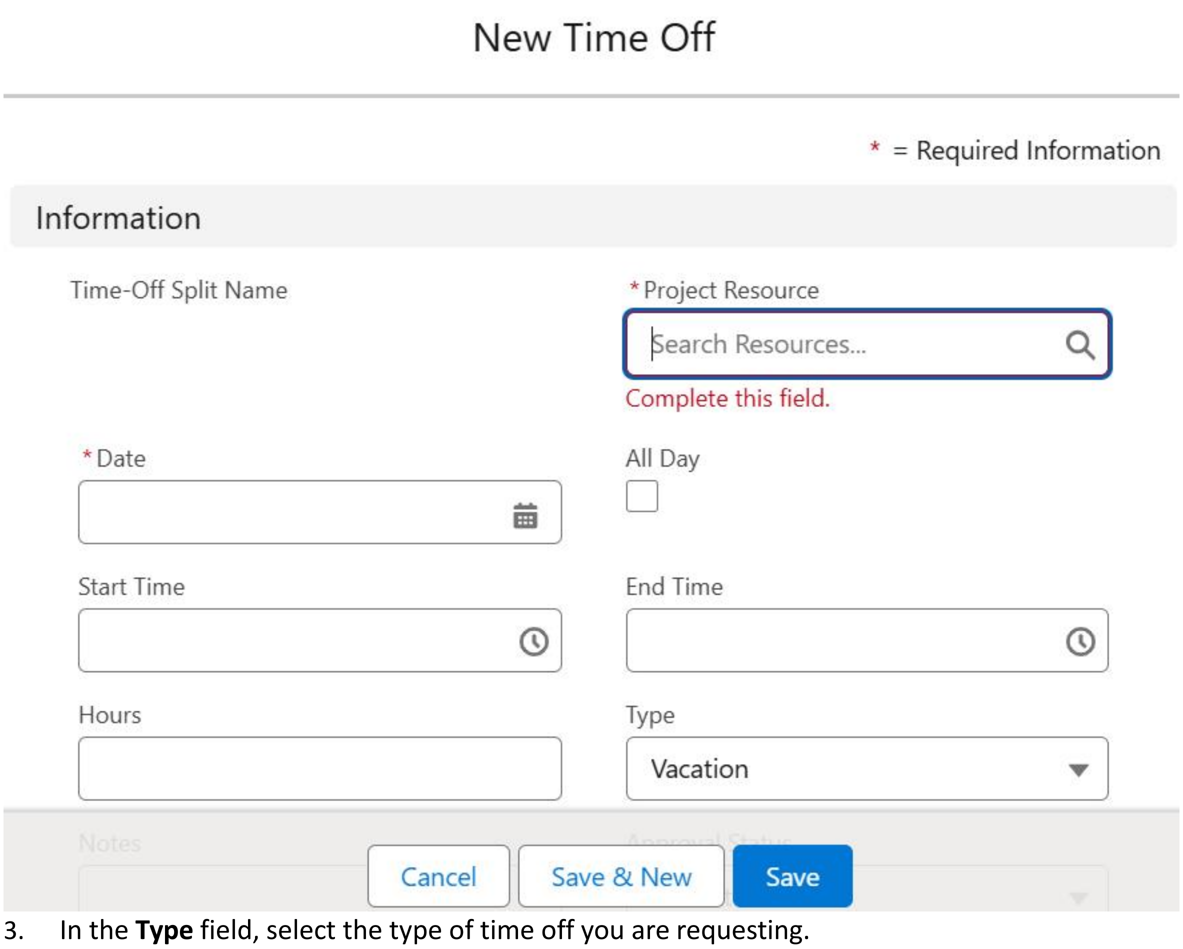
In order to create a Time Off request, you will need the following data in your system:
- A **Project Resource** associated with your User profile

Submit a Time Off Request

Requesting time off is a two-step process. First, create a new Time Off record, then send it for approval.

Create a New Time Off

1. In the **App Launcher**, search for .
2. On the Time Off tab, click **New** in the toolbar:



3. In the **Type** field, select the type of time off you are requesting.
    - The values available here are defined by your organization.
4. Enter the **Start** and **End Dates** of your Time Off.
    - If your request is for one day or less, enter the same date in both fields.
5. If right blank, the **Project Resource** field will auto-populate with the resource associated with the user creating the record. If you are creating this request for someone else, search and select the appropriate Project Resource.
6. **For requests shorter than one full day:** Enter the number of hours you are requesting in the **Hours** field. Leave this field blank if you are requesting Time Off for one full day or longer.
7. Optionally, add a short description of the time off in the **Note** field.
8. Click **Save**.

You will be taken to your new Time Off details page:

In the **Summary** section, you will see the **Total Absence** duration, in days and in hours. The Hours value represents the number of requested hours between the Time Off Start Date and End Date, as per the Project Resource's Work Schedule. Any non-working days such as weekends and holidays are therefore excluded from this duration.

The Total Absence in days tallies one day for every workable day between the Time Off Start Date and End Date. It is not a calculation of the Total Absense in hours divided by the Work Schedule of the resource. In other words, if you take a day and a half of Time Off, the **Total Absence (Days)** field will display 2.

Submit a Time Off

Time Off records require approval. First, go to the Salesforce settings interface to create an approval process.

When you are ready, click the **Submit for Approval** button in the toolbar.

The Time Off will be sent to the appropriate resource, as per the approval process defined by your organization. You can see the Approval Status of your Time Off requests from **Time Off Split** list view.

Once a Time Off request is **Approved**, a new row is added to **My Timesheet** at the corresponding dates.

Resource Planner

A Resource Planner is a tool for resource management and allocation, enabling teams to effectively plan and track the utilization of resources. It allows monitoring the total allocated and reported hours for each resource, categorized by daily, weekly, monthly, and project dimensions.

By using a Resource Planner, teams can efficiently allocate resources based on their availability and workload. It provides a comprehensive view of resource utilization, allowing teams to identify any potential over or under allocation issues and make necessary adjustments.

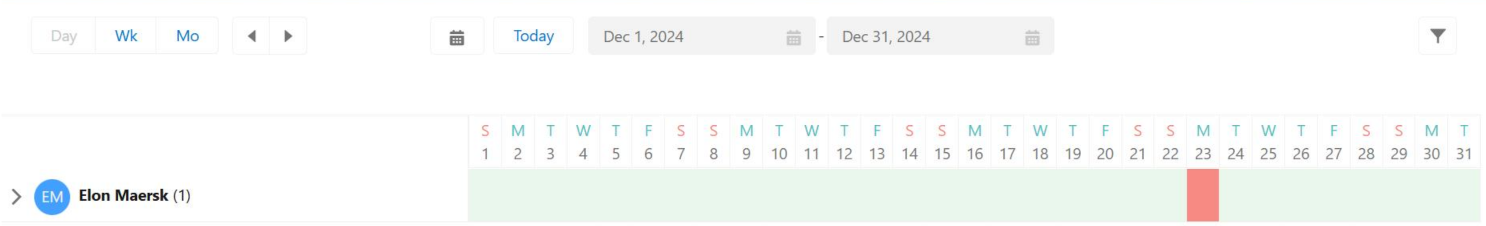
The Resource Planner also supports project-based resource allocation, enabling teams to assign specific resources to individual projects and track their utilization within those projects. This helps ensure optimal resource utilization and facilitates timely adjustments when needed.

Additionally, the Resource Planner offers a resource calendar view, allowing teams to easily visualize resource availability and schedule. This helps prevent overbooking or resource shortages during critical project phases.

In summary, a Resource Planner is a valuable tool that aids teams in effectively managing and allocating resources, ultimately improving project efficiency and success rates.

Navigation

Resource Planner is a grid-based interface that displays the scheduled and logged hours for each resource across days, weeks, and months. It provides a comprehensive overview of the total scheduled and logged hours for every project assigned to each resource. Additionally, it also showcases the breakdown of scheduled and logged hours allocated to individual tasks within each project. This optimized interface allows for improved visibility and better tracking of resource utilization and progress across different projects and tasks.



As illustrated above, the components of Resource Planner are:

A. Filter
B. Date selector
C. Assigned projects and tasks
D. Scheduled & Availibility
E. Scheduled Hours and Logged grid

After opening the Resource Planner interface, open the filter on the right side, which can be filtered using project resources or projects. Selecting a project represents viewing the scheduled hours and logging hours of the project's assigned resources under this project. By selecting resources, you can view the scheduled and logging hours of all assigned projects for these selected resources during this period.

The left side "Day, Wk, Mo" indicates that the calendar is displayed in a table dimension by day, week, or month. Click on the calendar icon and the selected date, combined with the day, week, and month, to determine the start date. The number next to the time range is used as the interval time and combined with the day, week, and month, to determine the end date.

Without filtering, the list on the left displays all project resources (which the current logged in user has permission to view). Clicking on the > icon will expand the projects to which project resources are assigned and the fixed Time Off that appears. Click the > on the top left of the project to expand the tasks assigned to project resources under this project.

If you choose Schedule, then the table on the right displays the scheduled hours and logging hours for each project and task of project resources. The left Time Off corresponds to the number of absence hours displayed on the right grid. Display the quantity based on the day, week, and month represented by each grid.

If Availability is selected, the table on the right displays the remaining working hours of project resources.

How are the hours for each grid calculated? Let's give an example to illustrate:

Example

Roxanne Green works 8 hours per day, Monday through Friday. On this particular week, Monday is a Holiday.

1. Weekly schedule: 8 hours * 5 days = 40 hours.
2. Actual work hours: 40 hours - 8 hours (Holiday) = 32 hours.
3. Weekly task assignment: 32 hours / 4 days = 8 hours per day (0 /8 / 8 / 8 / 8)
4. Remaining available hours: 0、0、0、0、0。

Time & Delivery

Overview

It is necessary to record the actual time and cost spent on each project resource during the project delivery process. After the project is completed, use this to summarize the final settlement time and cost of the project.

Prerequisites

User Permissions

To manage the project, the user needs to be added to one of the following permission groups:

- Salesmost User
- Salesmost Admin

Log Time

Overview

Anyone who works as hard as you do needs an easy way to track how they spend their time during the work week. And that is exactly what Salesmost's Timesheets are for: providing you with an intuitive interface to log your work hours.
There can be many reasons to keep track of the hours you spend on a task. For example, if your project is billable, you need to know how many hours to charge your customer. You might also want to make sure that your team doesn't go over the amount of time allocated for a task.
Now, let's have a look at how you can log your worked hours in **Timesheet** Module.

Existing Data

In order to use Timesheets, you need access to the following:

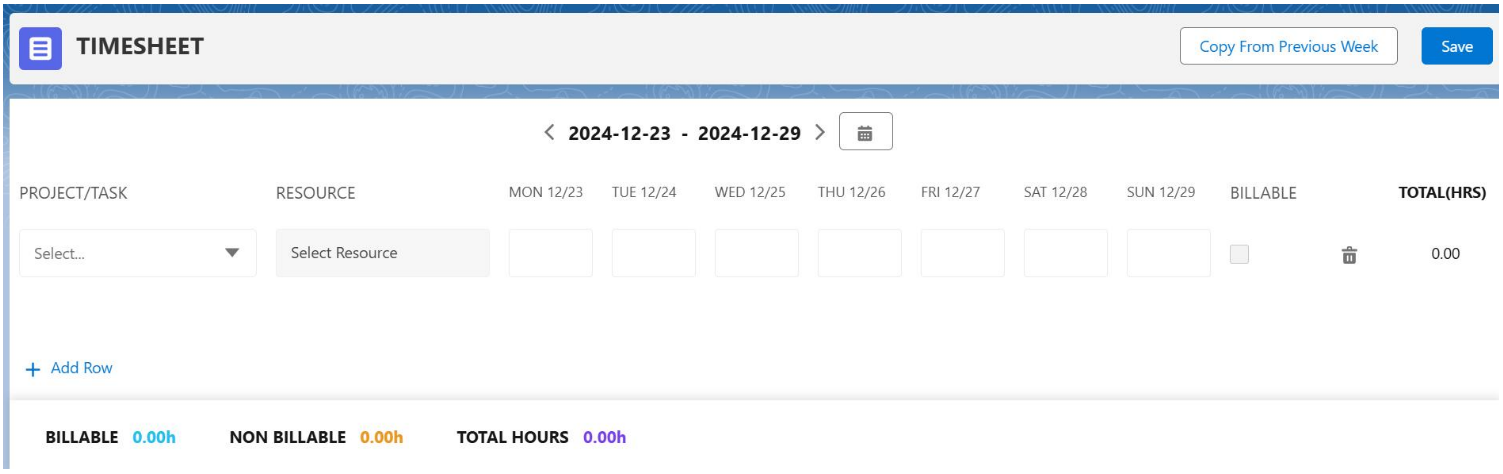
- A Project Resource with the Timesheet User box checked linked to your User profile.

Log Time From Timesheets

Timesheets is a proprietary interface that offers a quick and easy way to log the hours you worked on various Tasks. You can access it by searching My Timesheets in the App Launcher.

Navigation

Timesheets interface takes the form of a weekly grid where each row represents a Task for which you are logging hours, and each column is a day of that week. By default, Timesheets opens on the current week.



As illustrated above, the components of Timesheet are:
Timesheet footer, Date selector, Project Resource selector, Timesheet grid
In the Timesheet footer, you can view billable hours, non billable hours and total hours shown as 'BILLABLE', 'NON BILLABLE', 'TOTAL HOURS'.
With the Date Selector, you can click the arrows or select a date in the field to view a different week.
Next to the date, you can see the name of the Project Resource whose Timesheet you are viewing. By default, you will see your own timesheet. Depending on your role and permissions in your environment, you might be able to use the Project Resource selector to view a different resource and edit their Timesheet.
The Timesheet grid is the main component of Timesheet. This is where you will enter the hours you worked on projects and tasks. You will learn about the Timesheet grid in the **Enter Hours in a Timesheet** section below.

Enter Hours in a Timesheet

To create a Timesheet entry from the Timesheets tab:

1. In the Project/Task column, select the desired Project in the drop-down menu.
2. A list of active Tasks from the selected project will appear; select the desired task.

> Note: You cannot log time against Completed projects. By default, Completed tasks are also hidden from the list of tasks shown on My Timesheets.

3. Enter the number of hours in the appropriate date cell(s).
   - You must enter minutes as a decimal value, meaning 15 minutes of work must be entered as 0.25 hours, 30 minutes of work must be entered as 0.5 hours, and so on.
4. Click the speech bubble icon next to each cell, where you add hours,  to add a note about the work you performed. Keep in mind that, depending on your environment's invoice settings, notes related to Project Tasks could appear on customer invoices.
5. If you want to create additional Timesheet entries, click the + Add Row button and repeat the steps described above. To delete a row, use the trash can icon.
6. Don't forget to click Save before you navigate away from Timesheets.

When you make changes to an existing Timesheet, updated cells are highlighted in yellow until you save the changes.
It is also worth noting that once a Task is marked as Completed, existing saved hours will remain in My Timesheets, but the row will be greyed out and you will not be able to log additional hours against this task.
The Copy From Previous Week button instantly creates rows for all the Tasks on which you logged time the previous week. This is particularly helpful if you are working on long-term projects; all you need to do afterward is input your hours in the

appropriate date cells.

Holidays and Time Offs

Timesheet rows for Holidays and approved Time Offs are considered when calculating worked hours and availability. They also display on Timesheet at the corresponding date:
Holiday Timesheet rows are taken directly from the Holiday Schedule specified on the Project Resource's Work Schedule.
Time Offs need to be created in the system and approved as per the established process in order to appear on My Timesheets.
Both Holidays and Time Offs appear as greyed-out rows in Timesheet and cannot be edited or deleted.

Create an Expense

Overview

In addition to worked hours, some projects may incur additional costs in the form of **Expenses**. These expenses can include a variety of things such as materials purchased to realize a project, travel and lodging costs for a business trip, and even employee perks such as a company-issued phone.

Existing Data

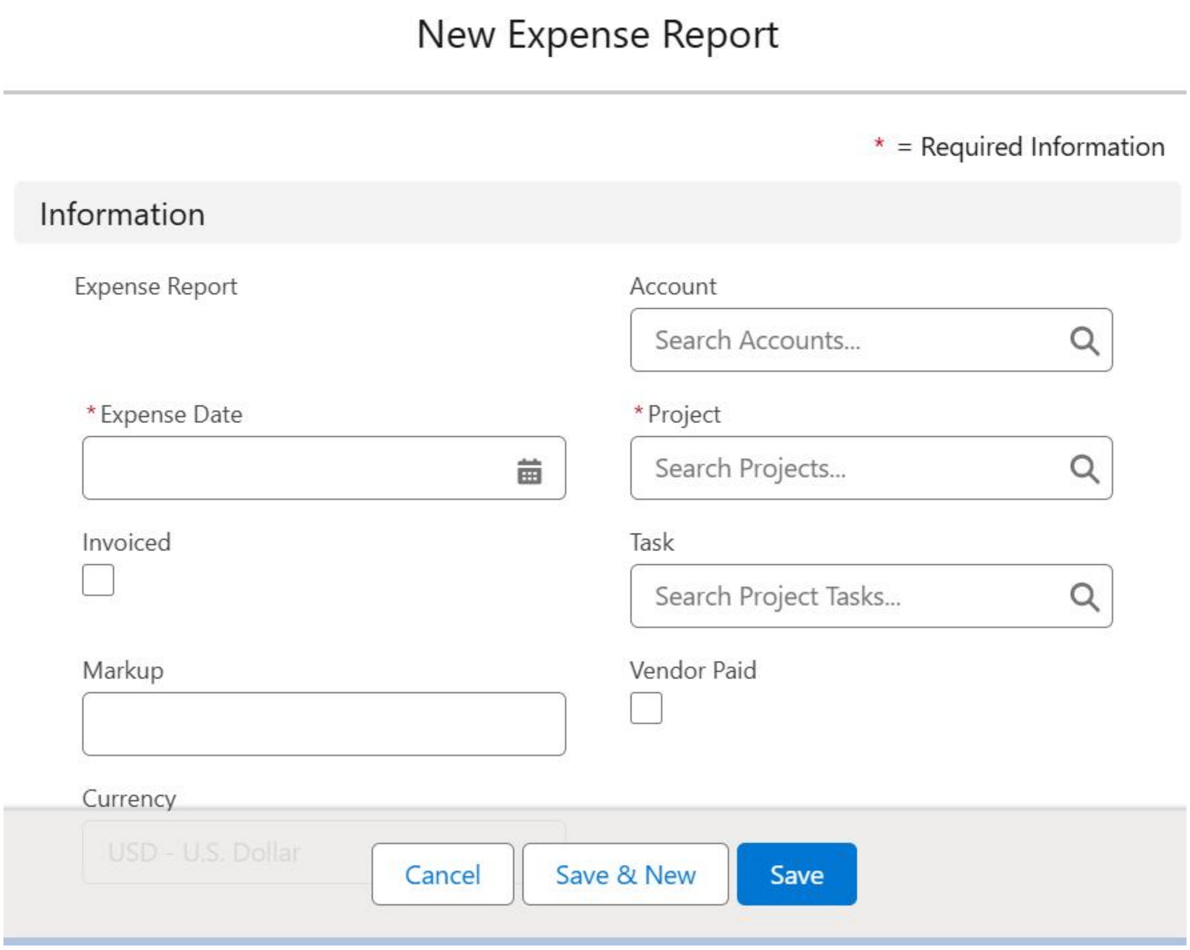
In order to create an expense, you will need access to the following data in your system:

- At least one Project record.

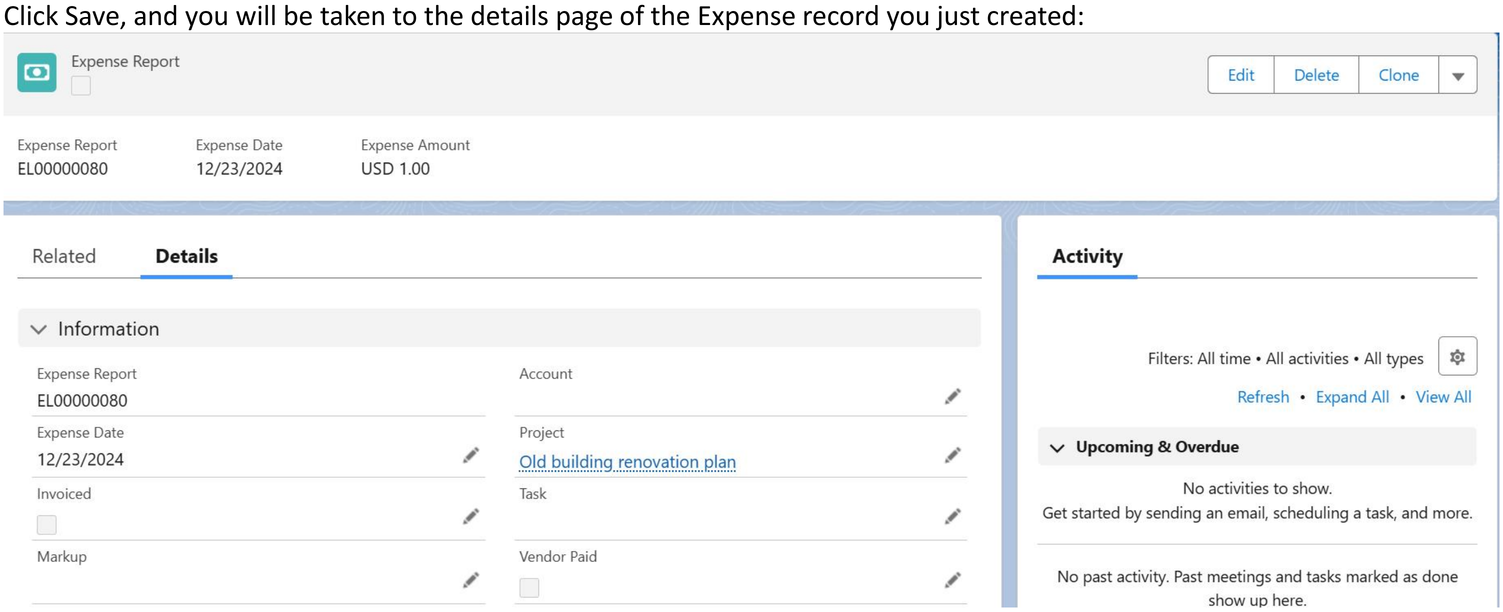
Create an Expense

Navigation

You can create new expense from the Expenses Report tab. Simply type Expenses Report in the App Launcher:
Then, on the Expense list view, click New in the toolbar:
On the New Expense Report form, the mandatory field is the Expense Date, Project and Expense Amount Expense. Date represents the date at which the report was created.



Click Save, and you will be taken to the details page of the Expense record you just created:



Estimated & Forecasted & Accounting

Overview

The previous chapters explained how to plan and create projects, assign tasks to team members, fill out timesheets and expense reports, track the status of your project. One important step remains: Calculate the revenue and costs of your work!

Accounting personnel or project managers can view the project's economic situation in real-time by viewing the project.

Prerequisites

User Permissions

To view a Project, Users need to be added to one of the following Permission Set Groups:

- Salesmost User
- Salesmost Admin

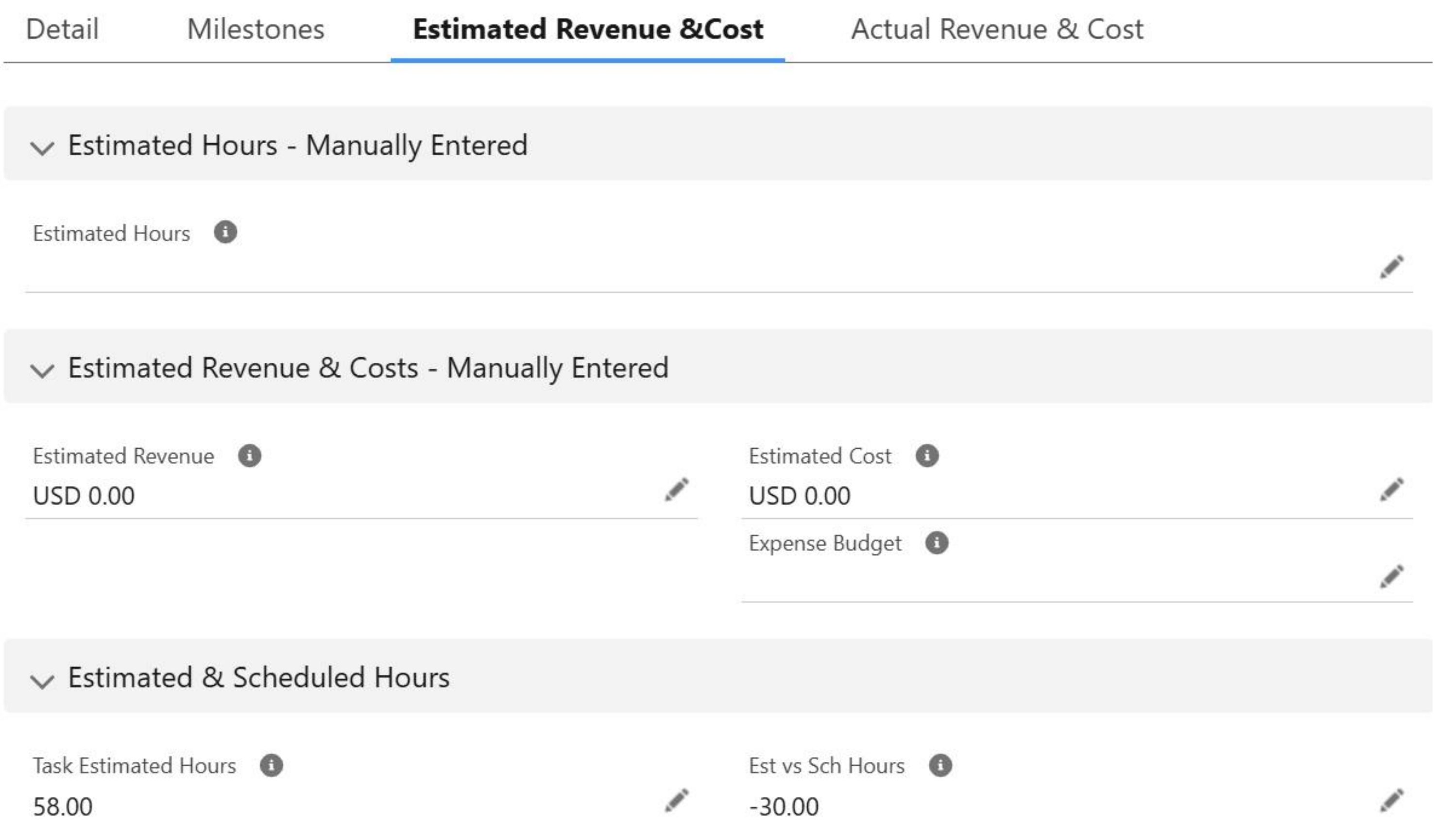
Navigate to Projects

Access the Projects tab via the App Launcher:

4. Click the **nine dots icon** in the top left corner to open the **App Launcher**.
5. Type in the search bar.
6. In the search results, under **Items**, select **Projects**.

View a Project

1. Click on the project name to enter the project details page.
2. You can view the **Time & Effort** and **Financials** parts of the project



Estimated Revenue & Cost

Field	Explanation
Estimated Hours	
Estimated Hours	When you fill in the estimated hours for each task on the project Gantt chart, this field will summarize all estimated hours on the task

Estimated Cost & Revenue	
Estimated Revenue	The estimated/budgeted revenue for this project, as entered. If Bottom-Up Planning is checked on the project, the revenue is calculated from the sum of all related Project Tasks' Expected Revenue, based on Project Resource Bill Rates.
Estimated Cost	The expected budgeted or planned costs for this project, as entered. If Bottom-Up Planning is checked on the project, the cost is calculated from the sum of all related Project Tasks' Budgeted Cost, based on Project Resources Cost Rates.
Expense Budget	The estimated Expense Budget for this project as entered. Also calculated from Expense Budget Contract Lines.
Estimated & Schaduled Hours	
Task Estimated Hours	Sum of scheduled hours of all tasks related to this project.
Scheduled Hours	The total number of planned hours for the project.A rollup of the project assignment planned hours for all resources on the project.
Hours Remaining (Estimated)	Calculated as the Estimated Project Hours - Total Logged Hours against the Project.
Hours Remaining (Scheduled)	Calculated as the Project Task Scheduled Hours - Total Logged Hours against the Project.
Est vs Sch Hours	Estimated Hours vs Scheduled Hours.
Planned Hours	an aggregation of the planned hours for all resources assigned to the project.
Estimated Hours To Complete	ETC, representing the estimated remaining work hours for project completion. Sum of all project tasks Estimated Hours To Complete field.
Estimated Hours at Completion	~~EAC, representing the estimated total working hours for project completion.~~ ~~Sum of all project tasks Estimated Hours At Completion Field.~~ An estimate of the total hours required to complete the project: Estimated Hous - Actual Hours -Hours Remaining (Scheduled)
Estimated Revenue & Costs	
Estimated Revenue At Completion	The sum of all project tasks Actual vs Estimated Revenue At Completion field value.
Estimated Cost At Completion	A sum of all project tasks Estimated Cost At Completion Field.

Actual Revenue & Cost

Field	Explanation
Logged Hours	
Billable Hours(Logged)	Total project billable hours from from all saved billable timesheets.
Actual Hours (Logged)	The total saved timesheet hours for the project, including billable and non-billable hours.
Actual Hours	
Billable Hours	Total project billable hours from from all approved billable timesheets.
Non-Billable Hours	Total project non-billable hours from all approved timesheets.
Act vs Est Hours	The sum of all related project tasks (Actual vs Estimated Hours) field value
Actual Hours	The total approved timesheet hours for the project, including billable and non-billable hours.
Actual Revenue & Costs	
Billable Amount(Logged)	Total project billable amount from from all saved billable timesheets.
Non-Billable Amount	Total project non-billable amount from all approved timesheets.
Billable Amount	Total project billable amount from all approved billable timesheets.

Milestone Amounts	A roll-up of the Milestone Payment amounts on the project tasks.
Invoiced Amount	The total amount that has been invoiced for this project. the total sum of money specified on an invoice that a buyer is required to pay to the seller for goods or services provided
Billable Cost (Logged)	Total project resource cost amount based on reource cost rate from all saved billable timesheets. ->total billable labor cost logged
Non-Billable Cost (Logged)	Total project resource cost amount based on reource cost rate from all saved non-billable timesheets. ->total nonbillable labor cost logged
Actual Costs (Logged)	Total project resource cost accumulated from all saved timesheets.Billable Cost (Logged) +Non-Billable Cost (Logged). ->total labor cost logged
Non-Billable Expense Cost (Logged)	The calculated Non-Billable Expense Costs for this project from all saved Non-Billable Expenses. Expense Cost saved but not yet been approved and not billable.
Expense Cost	The calculated Expense Costs for this project from Approved Expenses in Expense Report. It represent all the expense approved excluding labor/recource cost
Actual Costs	Total project cost amount from Approved Timesheet splits Cost Amount + Milestone Cost amount of Task.
Variance Budget	Sum of all related tasks to the project 'Variance Budget' field value.
Margins	
Margin(Logged)	The project margin is calculated as the Billable Amount (Logged timesheets) - (Total Cost Amount (Logged timesheets) - Non-Billable Expense Cost (Logged)). Recievable - cost. Profit based on logged hours.
Margin % (Logged)	Calculated as the (Margin(Logged) / Billable Amount(Logged))*100%. Profit ratio based on logged hours.
Margin	Calculated as the Invoiced Amount-Total Cost Amount-Expense Cost. Actual profit
Margin %	Calculated as the (Margin / Invoiced Amount)*100%. Actual Profit ratio

Navigate to Task

Access the Projects tab via the App Launcher:
1. Click the **nine dots icon** in the top left corner to open the **App Launcher**.
2. Type in the search bar.
3. In the search results, under **Items**, select **Project Task**.

View a Task

1. Click on the project name to enter the project details page.
2. You can view the **Task Status, Task Hours** and **Task Financials** parts of the project

Task Status

Status	
Project Task Name	Name of Task
Status	Status of Task, can be set as None, Open, Scheduled, In Progress, Blocked, Completed, Under QA, and Closed.
Invoiced?	Represents if this task has been Invoiced.
% Complete (Tasks)	The task's percentage complete, either manually entered or automatically calculated from sub-tasks.
Complete	Checked when this task is marked Complete. Automatically checked when the Task Status is set to Complete.

Task Hours

Estimated Hours	
Estimated Hours	The Estimated Hours to complete this task as entered.
Estimated Hours at Completion	Estimate at Completion based on the sum of the Hours Remaining Forecasted field and the Total Hours (Logged) field. Represents a forecast of how many hours will be entered against this task when it is completed based on the % Complete and Total Hours Logged
Estimated Hours to Complete	The projected hours remaining to finish this task as recorded.When the value is zero, the task is considered complete
Logged Hours	
Scheduled Hours	Represents the total assigned hours for all resources allocated to this task. This field aggregates data from the Hours field of Task Assignments.
Actual Hours	
Billable Hours	Approved billable timesheet hours for the task from both external and internal resources.
Non-billable Hours	Approved unbillable timesheet hours for the task from both external and internal resources.
Actual Hours	Total hours spent on the task. This rolls-up from task time entries on timsheet. Billable Hours+ Non-billable Hours
Variance Hours	
Est vs Sch Hours	Estimated Hours - Scheduled Hours of task. Estimated Hours to be scheduled
Act vs Est Hours	Actual Hours - Estimated Hours of task. Hours exceed estimation
Log vs Sch Hours	Total Logged Hours- Scheduled Hours of task. Logged Hours exceed Scheduled

Task Financials

Estimated Revenue&Cost	
Estimated Revenue	The anticipated revenue for this task as inputted.
Estimated Cost	Manually enter estimated costs for this task.
Estimated Revenue at Completion	The sum of Bill Rate multiplied by Total Scheduled Hours for each Task Assignment under the task.
Estimated Cost at Completion	The Estimated Cost at Completion (EAC) is the sum of Actual Cost and Estimated Cost to Complete (ETC).
Logged Revenue&Cost	
Billable Amount (Logged)	This refers to the total billable amount against this task, based on the resource bill rate for hours logged in timesheets but not yet approved
Actual Revenue&Cost	
Non-Billable Amount	The Total Non-Billable Amount for this Task from Approved Timesheets.
Billable Amount	The Total Billable Amount from Approved Timesheets for this Task.
Milestone Amount	An entered milestone payment amount. Invoicing uses this amount to invoice upon task completion.
Actual Cost	The Total Cost Amount for this Task.
Milestone Cost	A set cost amount allocated to this task, aggregated to the project level.
Variance Budget	The Total Billable Amount - Budgeted Cost of the task. Budget Amount That may varies(exceed) from estimated cost.