

Project

Time Based Payout

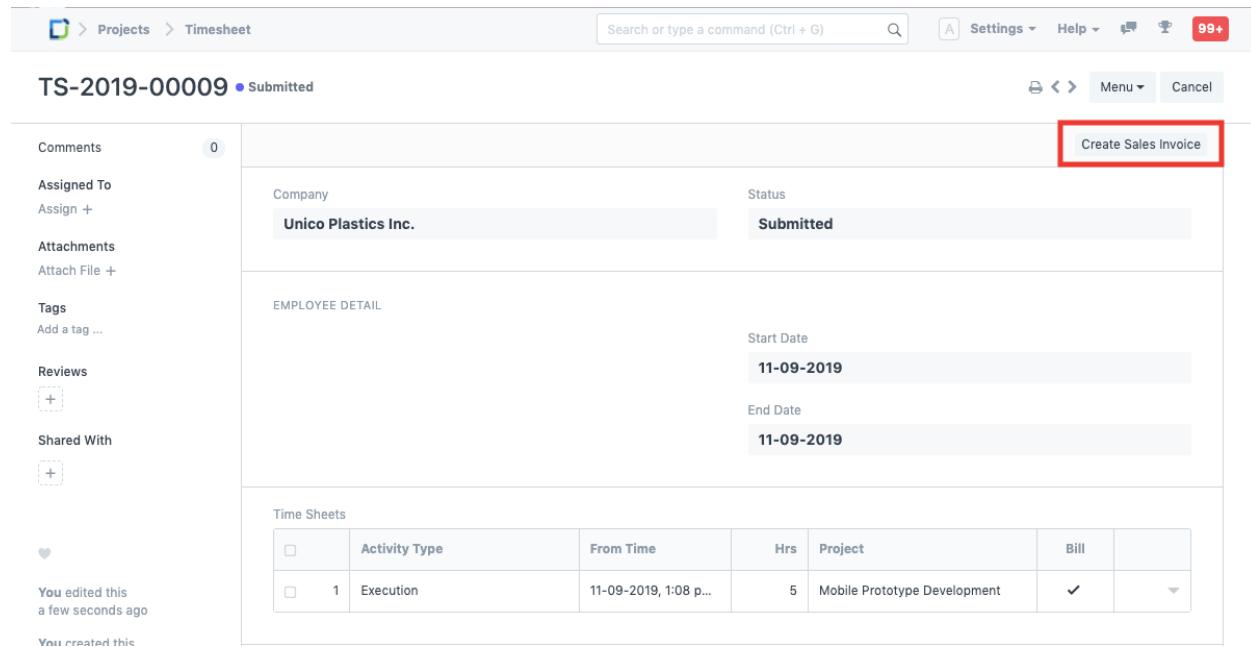
Time-based payout in DellSuite projects refers to the process of calculating and disbursing payments to employees or contractors based on the time they have spent working on specific projects or tasks.

This feature is particularly useful in industries where billing is tied to hourly rates or milestone achievements. DellSuite facilitates time-based payout by accurately tracking the time logged by individuals against project tasks or milestones. It allows organizations to set hourly rates or payment terms for different roles or projects, ensuring fair compensation for work done.

Sales Invoice from Timesheet

A customer can be billed based on the total number of hours an employee has worked for that customer. The actual number of hours of billable work can be tracked via a Timesheet.

A sales invoice can be generated from each Timesheet submitted by an employee which can be used to bill the customer.



TS-2019-00009 • Submitted

Comments 0

Assigned To

Attachments

Tags

Reviews

Shared With

You edited this a few seconds ago

You created this

Company: Unico Plastics Inc.

Status: Submitted

EMPLOYEE DETAIL

Start Date: 11-09-2019

End Date: 11-09-2019

Time Sheets

	Activity Type	From Time	Hrs	Project	Bill	
<input type="checkbox"/>	Execution	11-09-2019, 1:08 p...	5	Mobile Prototype Development	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>

1. How to Create A Sales Invoice from A Timesheet

1. Once the Timesheet is submitted, click on 'Create Sales Invoice'.

2. Enter the Item Code and name of the Customer who has to be billed against this Timesheet. The Item could be a Product as well as a Service. Click on 'Create Sales Invoice'.
3. All the details of the Timesheet will get auto-populated in the Sales Invoice.
4. The posting date and time will be set to current, you can edit after you tick the checkbox below Posting Time.
5. Optionally, you can include payments for POS or make this a credit note.
6. Save and Submit.

To fetch the details automatically in a Sales Invoice, click on the **Get items from** button. The details can be fetched from a Sales Order, Delivery Note, or a Quotation. The details like Customer PO, Address and Contact Number, Currency and Price List, Items will get auto-populated.

2. Features

Additional Details while creating a Sales Invoice from a Timesheet:

- **Accounting Dimensions:** Accounting Dimensions lets you tag transactions to a specific Territory, Branch, Project, etc. This helps in viewing accounting statements separately based on the criteria selected. To know more, visit the Accounting Dimensions page.
- **Time Sheet List:** Since the Project is created from a Time Sheet, the details of the Time Sheet will get auto-fetched. You can click on 'Add Row' to add more Time Sheets to this Invoice.

All the other details can be added as you would add them in any Sales Invoice.

3. After submitting

Once you have submitted the Sales Invoice, The details like 'Total Billed Hours', 'Total Billed Amount' and '% Amount Billed' will get updated in the Timesheet. Further, a Salary Slip can also be generated from the Timesheet.

Salary Slip from Timesheet

The salary of an employee can be calculated based on the number of hours that he has worked for on a particular project.

To enable the same, you may choose to create the Employee's Salary Slip directly from a Timesheet.

Jane Doe • Billed

Comments 2

Assigned To

Attachments

Tags

Reviews

Shared With

You edited this 4 hours ago

Search or type a command (Ctrl + G)

Settings Help 99+

TS-2019-00014

Create Salary Slip

Company: Unico Plastics Inc. Status: Billed

EMPLOYEE DETAIL

Employee: HR-EMP-00006: Jane Doe Start Date: 01-10-2019

Employee Name: Jane Doe End Date: 01-10-2019

Time Sheets

	Activity Type	From Time	Hrs	Project	Bill	
<input type="checkbox"/>	1 Research	01-10-2019, 11:23 a...	5	Mobile Prototype Development	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>

1. How to Create A Salary Slip from A Timesheet

- Once the Timesheet is submitted, and an invoice has been generated, go to the Timesheet and click on 'Create Salary Slip'.
- All the details, like the Employee, Employee Name, Posting Date, Company Name, Letter Head, etc. will get captured from the Timesheet.
- Dates:** Since this Salary Slip is getting generated out of a Timesheet, it will auto-fetch the Start Date and End Date from the Timesheet. However, the same can be changed.
- Salary Slip Timesheet:** The details of the Timesheet from which the Salary Slip was created will be captured. You can also more Timesheets here to create a single Salary Slip against multiple Timesheets.
- Save and Submit.

1.1. Additional Details while Creating a Salary Slip form a Time Sheet:

- Earnings and Deduction:** Any Earnings like HRA, Incentives etc. or Deductions like Income Tax, Provident Fund etc. in the Salary generated from the Timesheet can be mentioned here.
- Other Information:** According to the Salary Structure of the Employee, the Gross payment information, the Loan Repayment Information, and the Net Pay information will get auto-captured.

CRM Settings

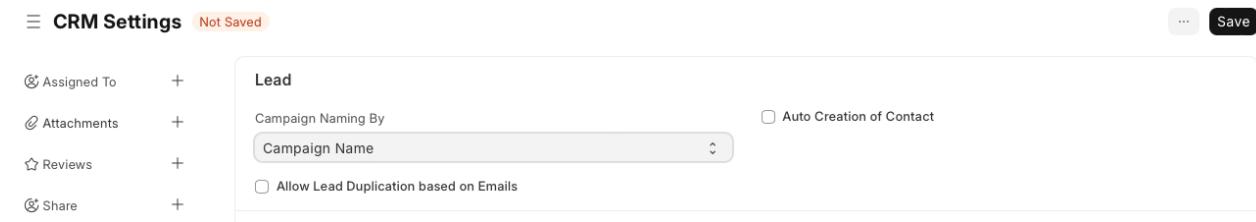
Introduced in Version 14.

CRM Settings allow you to configure your leads, opportunities, quotations and communication as per the business rules..

To access CRM Settings, go to:

Home > CRM > Settings > CRM Settings

Lead



CRM Settings Not Saved

Assigned To

Attachments

Reviews

Share

Lead

Campaign Naming By

Campaign Name

Auto Creation of Contact

Allow Lead Duplication based on Emails

Save

1. Campaign Naming By

It ensures consistency in the naming convention used by the organisation by automatically generating names for new campaigns based on predefined rules or patterns. It helps users create and maintain unique campaigns and track their effectiveness.

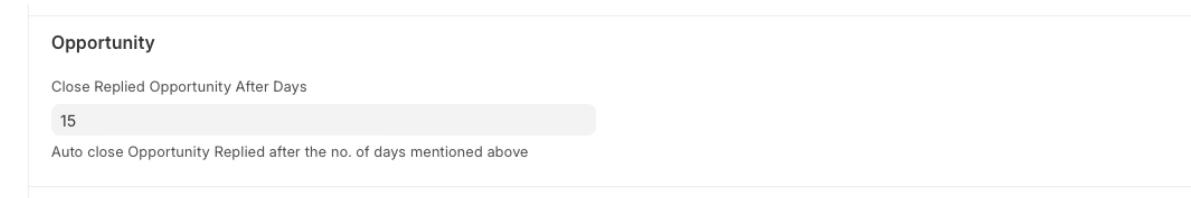
2. Allow Lead Duplication based on Emails

If this is enabled, the system will allow users to create multiple leads with the same email address at the same time.

3. Auto Creation of Contact

The system will automatically create a new Contact on creation of a Lead.

Opportunity



Opportunity

Close Replied Opportunity After Days

15

Auto close Opportunity Replied after the no. of days mentioned above

1. Close Replied Opportunity After Days

If there are many Opportunities having a status other than Open, then they will be auto-closed after the no. of days mentioned in this field if there is no action.

Quotation

Quotation
Default Quotation Validity Days
90

1. Default Quotation Validity Days

You can configure quotations to the customer to be valid only for certain days. In the Quotation, you can update Valid Till Date manually. By default, the Valid Till date is auto-set as 30 days from the Quotation's Posting Date. You can change the no. of days in this field as per your business case.

Other Settings

Other Settings
<input checked="" type="checkbox"/> Carry Forward Communication and Comments
All the Comments and Emails will be copied from one document to another newly created document(Lead → Opportunity → Quotation) throughout the CRM documents.

1. Carry Forward Communication and Comments

If this is enabled, When converting a Lead into Opportunity and Opportunity to Quotation, the system will auto copy the emails and comments from the source document.

Project Essentials

Project management in DellSuite covers various elements which are vital for successful project execution. These include project creation with key details like timelines, stakeholders, and managers, task and milestone management for granular progress tracking, resource allocation to ensure optimal utilization, time tracking for accurate project timelines, cost management for budget adherence, and robust reporting and analytics for real-time insights.

These project management essentials in DellSuite empower businesses to plan, execute, and monitor projects effectively, leading to improved productivity and project outcomes.

Project Type

A Project Type is the classification of projects into different types to group similar kind of projects.

Internal Projects, External Projects could be examples of Project types and are already created in the system. You can choose to add more Project Types. This comes handy when you are reviewing the Projects, and you want to filter the information based on Project Types.

New Project Type 2 • Not Saved

Project Type

Manufacturing Projects

Description

All the Projects which have a Manufacturing Process to be followed should be classified under Project Type 'Manufacturing'.

Save

To access Project Type, go to:

Home > Projects > Projects > Project Type

1. How to Create a Project Type

1. Go to the Project Type List and click on New.
2. Add the name of the Project Type and description
3. Save.

Project Template

A Project Template is a predefined sequence of tasks arranged in stipulated schedule.

These templates can be pulled for similar kind of Projects and the tasks therein get auto-populated at the time of creation of each new project.

To access Project Template, go to:

Home > Projects > Projects > Project Template

1. How to Create A New Project Template:

1. Go to the Project Template List and click on New.
2. Add the following details:
 - **Project Template Name:** Title of the Project Template
 - **Project Type:** Project Templates, just like projects can be classified into different project types, e.g., Internal or External.
 - **Tasks:** Each Project Template will have a set of a predefined sequence of tasks. In this table, you can select the tasks you want for this template.

Project

A Project is a planned piece of work that is designed to find information about something, to produce something new, or to improve something.

In DellSuite, project management is task-driven. You can create a Project and divide it into multiple Tasks.

A Project has a broad scope and hence can be divided into tasks. Think of coming up with a new smartphone for the next year as a Project. Then things like designing, prototyping, testing, delivery, etc. become tasks under the project.

Whilst each task within a Project can be assigned to an individual or a group of individuals, the assignment can also be done at the project level.

These Tasks can be created from a Project itself or a Task can be created separately as well.

To access Projects, go to:

Home > Projects > Projects > Project

1. How to Create a Project

1. Go to the Project list and click on New.
2. Add the following details:
 - **Project Name:** Title of the Project.
 - **Status:** The default status of a Project is going to be 'Open' which can later be changed to 'Completed' or 'Cancelled'.
 - **Expected End Date:** Enter the date on which you aim to finish the project.
3. Save.

1.1 Additional Options while creating a Project

1. **From Template:** If you have an existing Project Template, you can choose to create your project using this template.
2. **Expected Start Date:** If you have a time-line fixed for the project, you can define both expected Start Date and Expected End Date in the form.
3. **Project Type:** You can classify your projects into different types, e.g., Internal or External.
4. **Priority:** You can select the priority level of the Project based on how crucial it is. You can also add more priority levels.
5. **Department:** If the project belongs to, or is owned by a Department in the organization, you can add that here.
6. **Is Active:** A Yes/No tab, which lets you change the active status of the project at any later stage.
7. **Completion Method:** You can track the % completion of your project based on one of the three methods, viz. **Manual, Task Completion, Task Progress and Task Weight**.

Handbag Manufacturing Not Saved

Menu Save

See on Website

Comments 6

Assigned To

Attachments

Tags

Reviews

Shared With

DASHBOARD ▼

Status	Expected Start Date
Open	10-10-2019
Project Type	Expected End Date
Manufacturing	30-11-2019
Is Active	Priority
Yes	Medium
Manual Task Completion Task Progress Task Weight	
0%	

Some examples of how the Percentage Completion is calculated based on Tasks:

Project	Activity	% Progress	Weight	Status
SC001	Build	100	0.4	Completed
SC001	Operate	100	0.2	Completed
SC001	Transfer	50	0.2	Open
Method	Formula	Calculation		% Task Completed
Manual	-	-		Manual
Task Completion	Task completed / Total no. of Tasks	2/3		66.66
Task Progress	Sum of % Progress of all Tasks / Total No. of Tasks	(100+100+50)/3		83.33
Task Weight	Sum of (Task weight + % Progress)	(0.4 * 100 + 0.2 * 100 + 0.2 * 100)		70

Note: If the total weight of the Tasks is not 100, then the calculated result will be divided by the total weight. For example, if the total of task weights is 70, then percentage completed = $(70/0.8)\% = 87.5\%$.

2. Features

2.1. Customer Details, Users and Notes

- **Customer:** If a Project is being carried out for a particular Customer, the details can be fed in here.
- **Sales Order:** If a Project is based on a Sales Order from a Customer, you can fetch the details here. This would enable you to update the Customer on the Progress on the project as per the Sales Order issued.
- **Users:** You can add any website user to give them access to this Project. E.g., you can add your customer as a Website User, to enable them to have access to your project to monitor progress and/or give any inputs/remarks. Similarly, a Supplier or a Contractual Employee/Freelancer who is involved in the Project can be added as a User.

Further, you can also expand the window and select if you want to send a Welcome Email to any particular user or give them Attachment Viewing rights.

You can learn more about allowing users to view projects here.

- **Notes:** You can add any additional notes to the project.

The screenshot shows a project management interface for a 'Handbag Manufacturing' project. The top navigation bar includes 'File', 'Edit', 'View', 'Menu', and a 'Save' button. The left sidebar displays audit logs: 'You edited this 2 hours ago' and 'You created this 3 days ago'. The main content area is divided into sections: 'CUSTOMER DETAILS' (Customer: Closet Textiles Ltd., Sales Order: SAL-ORD-2019-00006), 'USERS' (Project will be accessible on the website to these users, listing 'bruce@example.com' and 'matt@example.com' with checkboxes for 'View a...' and 'Attachment Viewing rights'), and 'NOTES' (Notes: 'This project is being created against the Purchase Order by Closet Textiles to manufacture 50 handbags for them.' with rich text editor tools like bold, italic, underline, etc.).

2.2. Start and End Dates

- **Actual Start Date:** Basis the Actual Start of the project, tracked via Timesheets, the Actual Start Date and Time of the Project will get recorded automatically.
- **Actual End Date:** Basis the Actual End of the project, tracked via the last update of the Timesheet, the Actual End Date and Time of the Project will get recorded automatically. To know more about Timesheets, click [here](#).



2.3. Costing and Billing

- **Estimated Cost:** Enter the Estimated Cost of the Project.
- **Total Sales Amount:** If you have already linked the Project with a Sales Order, the Total Sales Order Amount will be auto-populated here.
- **Total Costing Amount:** The system will automatically fetch the Total Costing Amount from all the Timesheets linked to this project.
- **Total Billable Amount:** The system will automatically fetch the Total Billable Amount from all the Timesheets linked to this project.
- **Total Expense Claim:** Based on the expenses claimed by an Employee for the completion of the Project, the Total Expense Claim will be auto-calculated.
- **Total Billed Amount:** The Total Billed Amount gets auto-populated in the system using the Sales Invoice created against the Sales Order.
- **Total Purchase Cost:** The Total Purchase Cost of a Project is the cost fetched from the Purchase Invoices that get created against a Purchase Order issued for supply of Materials required for a Project.
- **Total Consumed Material Cost:** Using the Stock Entry made as per the requirement of Materials in the Project, the Total Consumed Material Cost gets captured.

2.4. Margin

- **Gross Margin:** Gross Margin would give you the margin you have between your Total Costing Amount and the Total Billed Amount.

Gross Margin = (Total Sales Amount + Total Billable Amount) - Total Costing Amount + Total Billable Amount + Total Expense Claim + Total Purchase Cost + Total Consumed Material Cost)

- **Gross %:** The percentage of the Total Billed Amount spent in the Total Costing Amount makes for the Gross %.

((Total Sales Amount + Total Billable Amount) - Total Costing Amount + Total Billable Amount + Total Expense Claim + Total Purchase Cost + Total Consumed Material Cost) / Total Sales Amount)* 100

Handbag Manufacturing Not Saved

Save

COSTING AND BILLING	
Estimated Cost	₹ 30,000.00
Total Costing Amount (via Timesheets)	₹ 5,315.00
Total Expense Claim (via Expense Claims)	₹ 6,200.00
Total Purchase Cost (via Purchase Invoice)	₹ 6,000.00
Company	Unico Plastics Inc.
Default Cost Center	Main - U
MARGIN	
Gross Margin	₹ 19,985.00
Gross Margin %	53.29%

2.5. Monitor progress

When you enable the 'Collect Progress' option by checking the box, it will enable you to add monitoring details to the project. A report on the progress of the project shall be sent to all stakeholders of the project.

- **Holiday List:** You can select the Holiday List for your company. This will allow you to collect the Progress Reports only on the Working Days.
- **Frequency:** You can set the frequency at which you wish to get the reports. It can be set to an hourly, twice daily, daily or on a weekly frequency.

MONITOR PROGRESS ^

Collect Progress

Holiday List
2019-20

Frequency To Collect Progress
Weekly

Day to Send
Wednesday

Time to send
12:00:0

Message

Please find attached the Progress Report on the Project 'Handbag Manufacturing' for your reference.

Message will sent to users to get their status on the project

Tasks

In project management, a task is an actionable unit or activity which needs to be completed.

Task

Reports ▾
ID Subject Mobile Prototype De...
Menu ▾ Refresh New

Add Filter	Last Modified On <input type="button" value="▼"/>			
<input type="checkbox"/> ● Subject	Status	Project	Is Group	6 of 6
<input type="checkbox"/> ● Support	● Open	Mobile Prototype De...	TASK-2019-00016	14 d <input type="button" value="..."/> 0
<input type="checkbox"/> ● Documentation	● Open	Mobile Prototype De...	TASK-2019-00015	14 d <input type="button" value="..."/> 0
<input type="checkbox"/> ● Testing	● Open	Mobile Prototype De...	TASK-2019-00014	14 d <input type="button" value="..."/> 0
<input type="checkbox"/> ● Implementation	● Open	Mobile Prototype De...	TASK-2019-00013	14 d <input type="button" value="..."/> 0
<input type="checkbox"/> ● Analysis	● Overdue	Mobile Prototype De...	TASK-2019-00012	14 d <input type="button" value="..."/> 0
<input type="checkbox"/> ● Requirement Gathering	● Overdue	Mobile Prototype De...	TASK-2019-00011	14 d <input type="button" value="..."/> 0

To access Tasks, go to,

Home > Projects > Projects > Task

1. How to Create a Task

1. Go to the Task List and click on New.
2. Add the subject of the task.

3. Save.

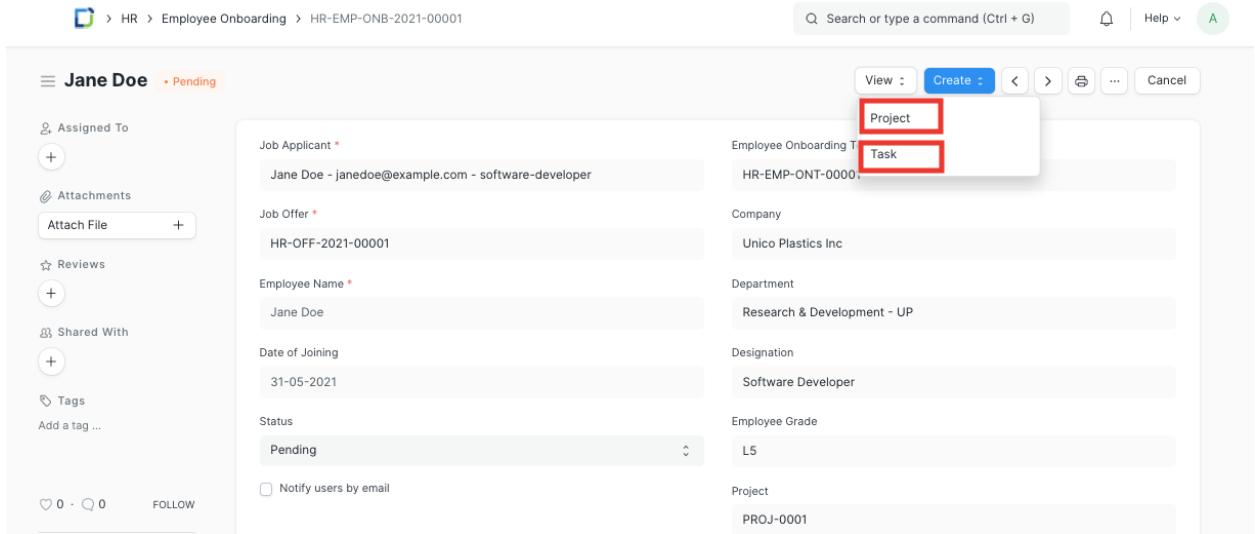
Alternatively, a task can also be created from a Project in the following way:

1. Go to the Project for which you want to create a new task.
2. Go to Task under the Project section on the Dashboard. The plus icon '+' here would direct you to the task creation page.
3. Add the subject of the task.
4. Save.

1.1 Additional Options while creating a Project

The following additional details can be added when editing a new task:

- **Status:** You can add the status of the Project or change the same whenever needed, e.g., from 'Open' to 'Working', 'Overdue', 'Pending Review', 'Completed', or 'Cancelled'
- **Project:** In case a task is added independently, you may choose to link the task to a particular Project. If the task is created from a Project, the details of the Project will get automatically added.
- **Priority:** You can choose to define the priority of the task, viz., Low, Medium, High or Urgent.
- **Issue:** If the task is an actionable that arises out of an Issue, that issue can be tagged here with the Task.
- **Weight:** If a particular task carries some weightage out of a project, or otherwise, the weightage can be specified here. This weightage gets calculated in the Percentage Task Completion Method by Task Weight.
- **Type:** If your task can be defined under a particular Task Type, say, User Training or User Demo, you can enter the Task Type here. It can be used to filter the Tasks based on Task Types.
- **Color:** Each task can be recognized by a different color. This helps in identifying a task while creating Gantt Charts.
- **Is Group:** This box can be checked to indicate that a task is a parent task, and can be further divided into multiple sub-tasks.
- **Is Template:** This box can be checked to indicate that this task is a template task, and is meant to be used in a Project Template.
- **Parent Task:** If a particular task is a part of a group task, the parent task can be linked to the task from this field.



2. Features

2.1. Timeline and Details

- **Expected Start Date:** You can enter the date on which you expect the Task to be started.
- **Expected End Date:** You can enter the date on which you expect this Task to be finished.
- **Expected Time:** You can enter the number of hours which you expect are going to be spent on this task.
- **Progress:** You can enter the Progress Percentage of a Task.
- **Begin:** If the task is a template task, this field can be used to specify the day on which this task should begin after the project is commenced.
- **Duration:** If the task is a template task, this field can be used to assign a specific number of days to this task.
- **Is Milestone:** This box can be checked in the cases where a particular task is a Milestone in a Project.
- **Description:** You can add a description of the task here.

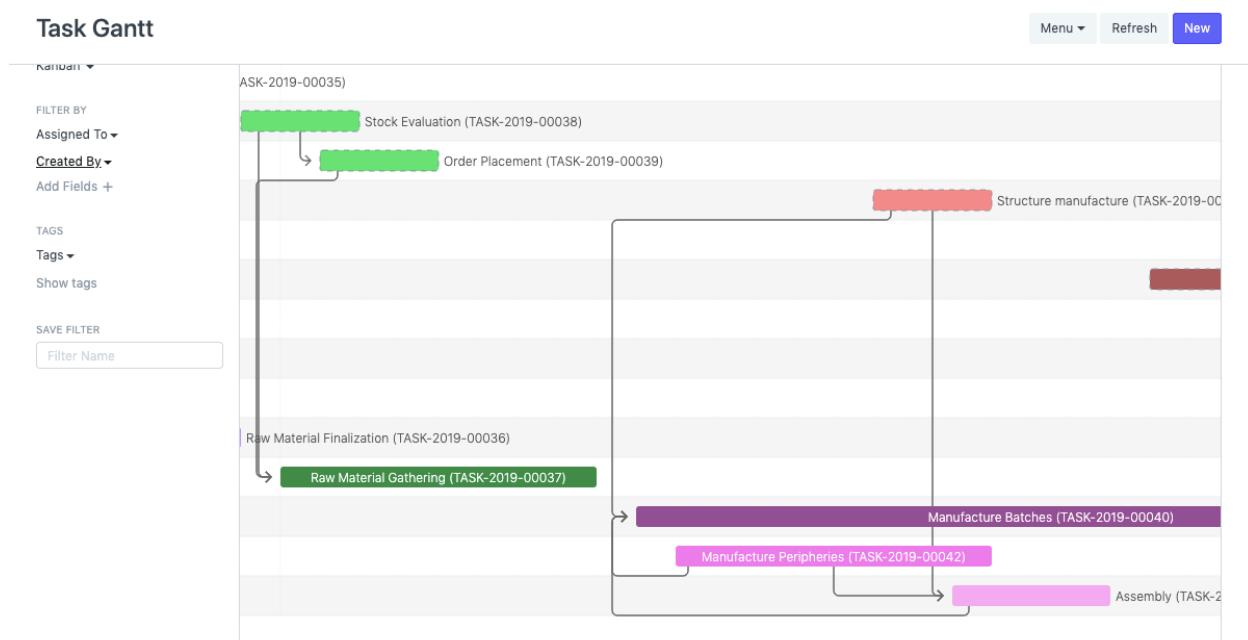
Note: Based on the values of **Begin** and **Duration** field, the **Expected Start Date** and **Expected End Date** gets calculated for Project Tasks created using Project Template. This calculation skips holidays based on the holiday list of your company.

TIMELINE ▾	
Expected Start Date	Expected End Date
18-12-2020	22-12-2020
Expected Time (in hours)	% Progress
0.000	0.000
Begin On (Days)	Duration (Days)
2	4
<input type="checkbox"/> Is Milestone	
DETAILS	
Task Description	
Normal B I U A A ” „ ↶ ↷ ↶↶ ↷↷ ≡ ≡≡ Table ↶ ↷	
Create a unique Handbag design according to the order placed by Closet Textiles.	

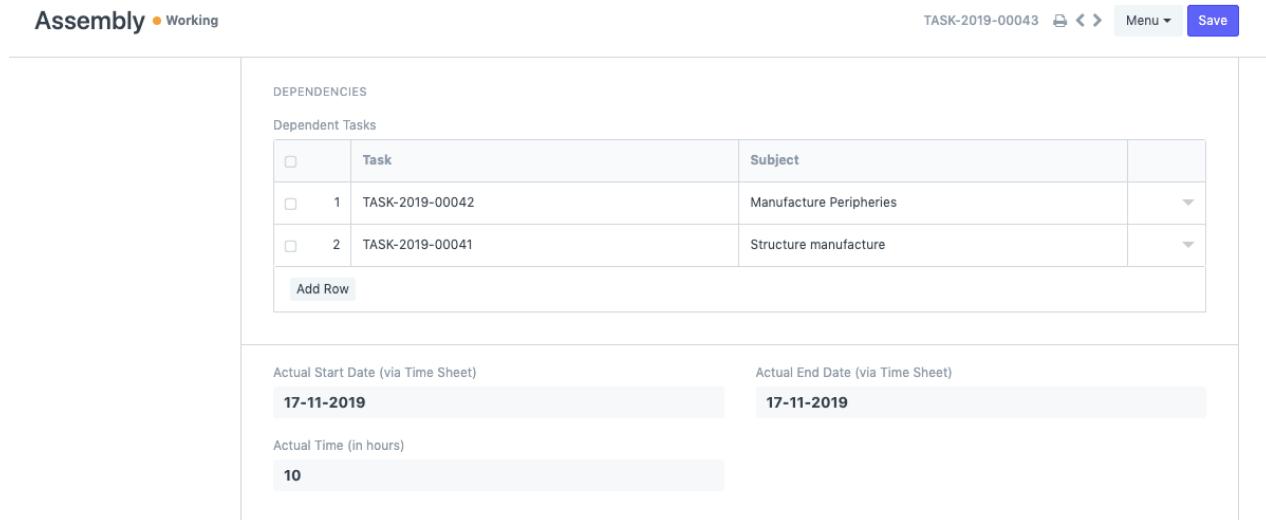
2.2. Dependencies and Actual Time

- **Dependent Tasks:** Dependent tasks indicate that a particular task is dependent on another task, and the former cannot be completed before the completion of the latter.

Task dependencies can be viewed in the Gantt Charts in the following way.



- **Actual Start Date:** The actual date and time on which the Task is started get recorded basis the Timesheets.
- **Actual End Date:** The actual date and time on which the task was finished get recorded here via the Timesheets.



The screenshot shows a task management interface for a task named 'Assembly'. The top navigation bar includes 'Working' status, a task ID 'TASK-2019-00043', and a 'Save' button. The main content area is divided into sections: 'DEPENDENCIES' (listing two dependent tasks, both of which are 'Manufacture Peripheries'), 'Actual Start Date (via Time Sheet)' (set to 17-11-2019), 'Actual End Date (via Time Sheet)' (set to 17-11-2019), and 'Actual Time (in hours)' (set to 10).

	Task	Subject
<input type="checkbox"/>	1 TASK-2019-00042	Manufacture Peripheries
<input type="checkbox"/>	2 TASK-2019-00041	Structure manufacture

Actual Start Date (via Time Sheet): 17-11-2019

Actual End Date (via Time Sheet): 17-11-2019

Actual Time (in hours): 10

2.3. Costing

- **Total Costing Amount:** The Total Costing Amount gets captured here via the Timesheets submitted by the user while working on this task.
- **Total Billing Amount:** The Total Amount with which the Customer is to be billed via this task gets recorded here from the Timesheets.
- **Total Expense Claim:** The Total Amount of Expense claimed by an Employee for the completion of this Task gets recorded and reflected here.

2.4. More Info

- **Department:** You can enter the Owner Department for the task. Irrespective of the Owner department of the Project, each task can be carried out by a different department.
- **Company:** You can change the Company for which this Task is being carried out. This can be used in cases where A company is carrying out the Task for its Sister Company or its Parent Company or a Subsidiary.

Assembly • Not Saved

TASK-2019-00043     

COSTING ▾	
Total Costing Amount (via Time Sheet) ₹ 750.00	Total Billing Amount (via Time Sheet) ₹ 450.00
Total Expense Claim (via Expense Claim) ₹ 400.00	
MORE INFO ▾	
Department Production - U	
Company Unico Plastics Inc.	

Project Update

A Project Update is the status of the Project which can be sent to all the stakeholders of the Project.

Each time you want to update the stakeholders about the project, you can send a Project Update to them.

≡ UPDATE-PROJ-0001-240621-0001 Submitted < > ...

<input checked="" type="checkbox"/> Assigned To	+	Project *	PROJ-0001	Date	21-06-2024
<input checked="" type="checkbox"/> Attachments	+	<input checked="" type="checkbox"/> Sent		Time	16:40:55
<input checked="" type="checkbox"/> Tags	+				
<input checked="" type="checkbox"/> Share	+				
Users					
<input type="checkbox"/>	No.	User *	Full Name	View attachments	
<input checked="" type="checkbox"/>	1	Pushkar Joshi	Pushkar Joshi	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	2	Umair Sayyed	Umair Sayyed	<input checked="" type="checkbox"/>	

Heart 0 · Comment 0 FOLLOW

You last edited this · just now

You created this · just now

To access Project Update, go to:

Home > Projects > Projects > Project Update

1. How to Create a Project Update

1. Go to the Project Update List and click on New.
2. Add the name of the Project for which you want to send an update.
3. Add the name of the Users to whom you want to send the Project Update in the Child Table. These Users could be your Customers or any other Internal or External Stake Holders.

4. Save and Submit.

Once you have submitted the Project Update, an email is sent to the selected stakeholders with project updates.

1.1. Additional Details

When you expand the table which has the names of the Users, you will be able to add the following details:

1. You can select whether you want to send a Welcome Email to any particular User while sending them the Project Update.
2. You can select whether you want any particular User to view Attachments in the Project Update.
3. You can add the description of the Current Status of the Project in the 'Project Status' field which will indicate the progress of the project.

Project Costing

Each project has multiple tasks associated with it. To track the actual cost of a Project, primarily in terms of services, a User has to create a Timesheet based on the time spent on a Task within a Project. You can track the service cost against a Project in the following ways.

Activity Type

Activity Type is a master of services offered by your personnel. You can add a new Activity type from:

Home > Projects > Activity Type > New

Activity Cost

Activity Cost is a master where you can track billing and costing rate for each Employee, for each Activity Type.

Ronn Stark for Designing the product

PROJ-ACC-00002 [Menu](#)

Comments	1	Activity Type	Employee Name
Assigned To		Designing the product	Ronn Stark
Assign +			
Attachments		Employee	
Attach File +		HR-EMP-00014	
Tags		Billing Rate	Costing Rate
Add a tag ...		500.00	1,000.00
Reviews		per hour	per hour
Shared With			

Timesheet

Based on the time spent on the Project-Task, an Employee will create a Timesheet.

TS-2019-00013

[Menu](#)

Comments	2		Create Sales Invoice														
Assigned To		Company	Status														
Assign +		Unico Plastics Inc.	Submitted														
Attachments																	
Attach File +																	
Tags		EMPLOYEE DETAIL															
Add a tag ...																	
Reviews		Start Date															
		22-09-2019															
Shared With		End Date															
		22-09-2019															
You edited this		Time Sheets															
3 days ago		<table border="1"><thead><tr><th></th><th>Activity Type</th><th>From Time</th><th>Hrs</th><th>Project</th><th>Bill</th><th></th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>1</td><td>Planning</td><td>22-09-2019, 1:08 p...</td><td>8</td><td>Mobile Prototype Development</td><td><input checked="" type="checkbox"/></td></tr></tbody></table>		Activity Type	From Time	Hrs	Project	Bill		<input type="checkbox"/>	1	Planning	22-09-2019, 1:08 p...	8	Mobile Prototype Development	<input checked="" type="checkbox"/>	
	Activity Type	From Time	Hrs	Project	Bill												
<input type="checkbox"/>	1	Planning	22-09-2019, 1:08 p...	8	Mobile Prototype Development	<input checked="" type="checkbox"/>											
You created this		Total Working Hours															
3 days ago		8															

On selection of the Activity Type in the Time Log, Billing and Costing Rate will be fetched for that Employee from the respective Activity Cost.

Multiplying these rates with total no. of hours in the Time Log gives Costing Amount and Billing Amount for the specific Time Log.

Costing in Project and Task

Based on all the Timesheets created for specific Tasks, its costing will be updated in the respective Task.

Assembly Not Saved

TASK-2019-00043 Save

COSTING ^ <div style="display: flex; justify-content: space-between;"> <div>Total Costing Amount (via Time Sheet) ₹ 750.00</div> <div>Total Billing Amount (via Time Sheet) ₹ 450.00</div> </div> <div style="display: flex; justify-content: space-between;"> <div>Total Expense Claim (via Expense Claim) ₹ 400.00</div> </div>	
MORE INFO ^ <div style="display: flex; justify-content: space-between;"> <div>Department Production - U</div> <div>Company Unico Plastics Inc.</div> </div>	

Same way, the Project cost will be updated based on Timesheets created against each of its associated tasks and the cost of the Project gets updated simultaneously.

Handbag Manufacturing Not Saved

TASK-2019-00043 Save

COSTING AND BILLING ^ <div style="display: flex; justify-content: space-between;"> <div>Estimated Cost ₹ 30,000.00</div> <div>Total Sales Amount (via Sales Order) ₹ 37,500.00</div> </div> <div style="display: flex; justify-content: space-between;"> <div>Total Costing Amount (via Timesheets) ₹ 5,315.00</div> <div>Total Billable Amount (via Timesheets) ₹ 5,925.00</div> </div> <div style="display: flex; justify-content: space-between;"> <div>Total Expense Claim (via Expense Claims) ₹ 6,200.00</div> <div>Total Billed Amount (via Sales Invoices) ₹ 37,500.00</div> </div> <div style="display: flex; justify-content: space-between;"> <div>Total Purchase Cost (via Purchase Invoice) ₹ 6,000.00</div> <div>Total Consumed Material Cost (via Stock Entry) ₹ 0.00</div> </div> <div style="display: flex; justify-content: space-between;"> <div>Company Unico Plastics Inc.</div> <div>Default Cost Center Main - U</div> </div>	
MARGIN ^ <div style="display: flex; justify-content: space-between;"> <div>Gross Margin ₹ 19,985.00</div> <div>Gross Margin % 53.29%</div> </div>	

Project Profitability

Project and related activities are generally active for longer periods. While developments keep happening on the Project, various transactions are done against each project. While new

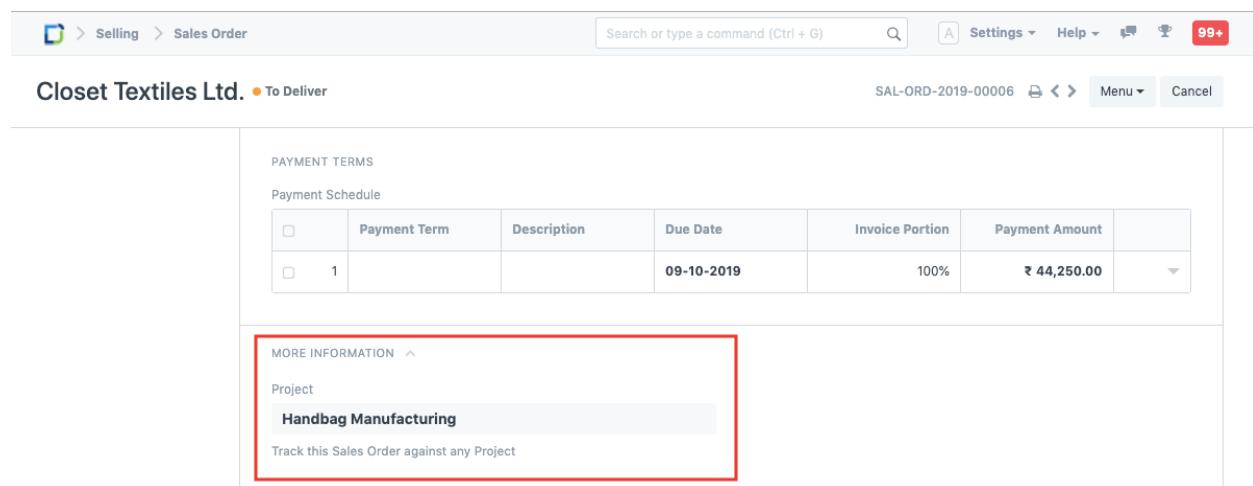
developments keep happening on a project, it may lead to more investment in terms of time, money, and material. Hence, it becomes important to track the Profitability of a Project to ensure that you don't overspend.

In simple terms, Project Profitability is the difference between the revenue generated from a project versus the costs associated with it.

Project in Sales Transactions

You can link a Project in all sales transactions like Sales Order, Delivery Note, Sales Invoice, and Payment. Linking your project with the sales transactions will help you track the income received against that Project.

In sales transactions, Project field is generally available in the More Information section.



The screenshot shows the Zoho Inventory Sales Order interface. At the top, there's a navigation bar with 'Selling' and 'Sales Order' selected. The main area shows a sales order for 'Closet Textiles Ltd.' with a due date of '09-10-2019'. Below the header, there's a 'PAYOUT TERMS' section with a table for 'Payment Schedule'. The table has columns for 'Payment Term', 'Description', 'Due Date', 'Invoice Portion', and 'Payment Amount'. One row is visible with a payment term of '1' and a due date of '09-10-2019'. At the bottom of the screen, there's a 'MORE INFORMATION' section with a red box highlighting the 'Project' field, which contains the value 'Handbag Manufacturing'. A note below says 'Track this Sales Order against any Project'.

Project in Purchase Transactions

You can also link your project to the purchase transactions like Purchase Order, Purchase Receipt, and Purchase Invoice.

In the purchase transactions, the option to link a project is available in the Item table. This is because you could be procuring material for multiple projects from the same purchase entry.

Mitali • To Receive

	Billed Amt ₹ 6,000.00	Cancel
ITEM WEIGHT DETAILS		
WAREHOUSE AND REFERENCE		
Warehouse Stores - UP	Blanket Order Rate ₹ 0.00	
To be delivered to customer		
Project Handbag Manufacturing		
Qty as per Stock UOM 300	Received Qty 0	
ACCOUNTING DETAILS		
Expense Account Cost of Goods Sold - UP		

Budgeting against Project

You can create a Budget for a project as well. The expense limit defined in the Budget will be validated in the expense transactions.

New Budget 1 • Not Saved

Budget Against Project	Monthly Distribution Monthly Project Distribution
Company Unico Plastics Inc.	
Project Handbag Manufacturing	
Fiscal Year 2019-2020	

Project Profitability

Based on all the income and expense entries created for the Project, you can get its profitability.

Accounting > Profitability Analysis

You can filter the report by Project to check Project-wise Profitability.

Profitability Analysis

Menu ▾ Refresh

Unico Plastics Inc.		Project	2019-2020		01-04-2019		31-03-2020		<input type="checkbox"/> Show zero values
	Project	Currency	Income	Expense	Gross Profit / ...				
1	Handbag Manufacturing	INR	₹ 37,500.00	₹ 6,600.00	₹ 30,900.00				
2									
3	Total		₹ 37,500.00	₹ 6,600.00	₹ 30,900.00				

[Collapse All](#)

For comparison, use >5, <10 or =324. For ranges, use 5:10 (for values between 5 & 10).

Execution Time: 0.1 sec

Project Views

As projects are time-sensitive, we need different kind of views to convey information in a visual manner to users viewing them.

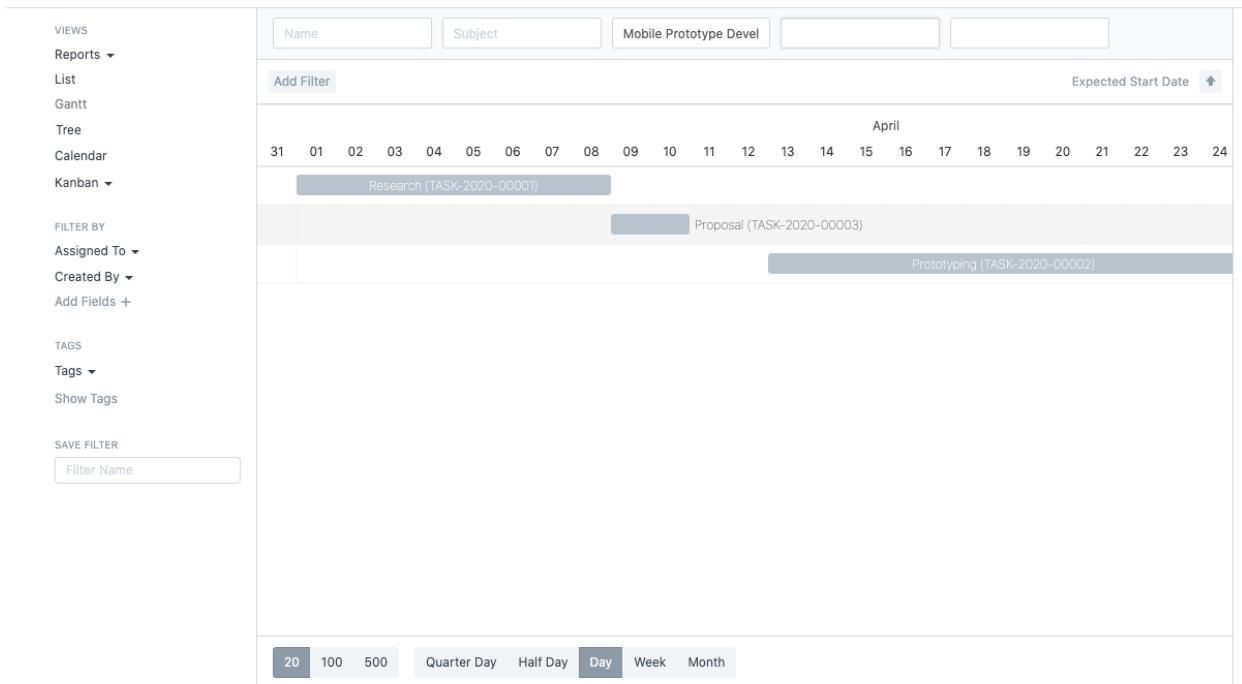
Apart from the generic list and report views for projects and tasks, DellSuite also provides Gantt, Kanban, and Calendar views for tasks. You can access these views by going to the Task list and selecting them via the left sidebar.

Gantt View

A Gantt Chart shows how tasks are linked to each other and shows their execution sequence, based on start and end dates set in the tasks along with any dependencies, if available.

Task Gantt

Menu ▾ Refresh New



Gantt Chart for Tasks

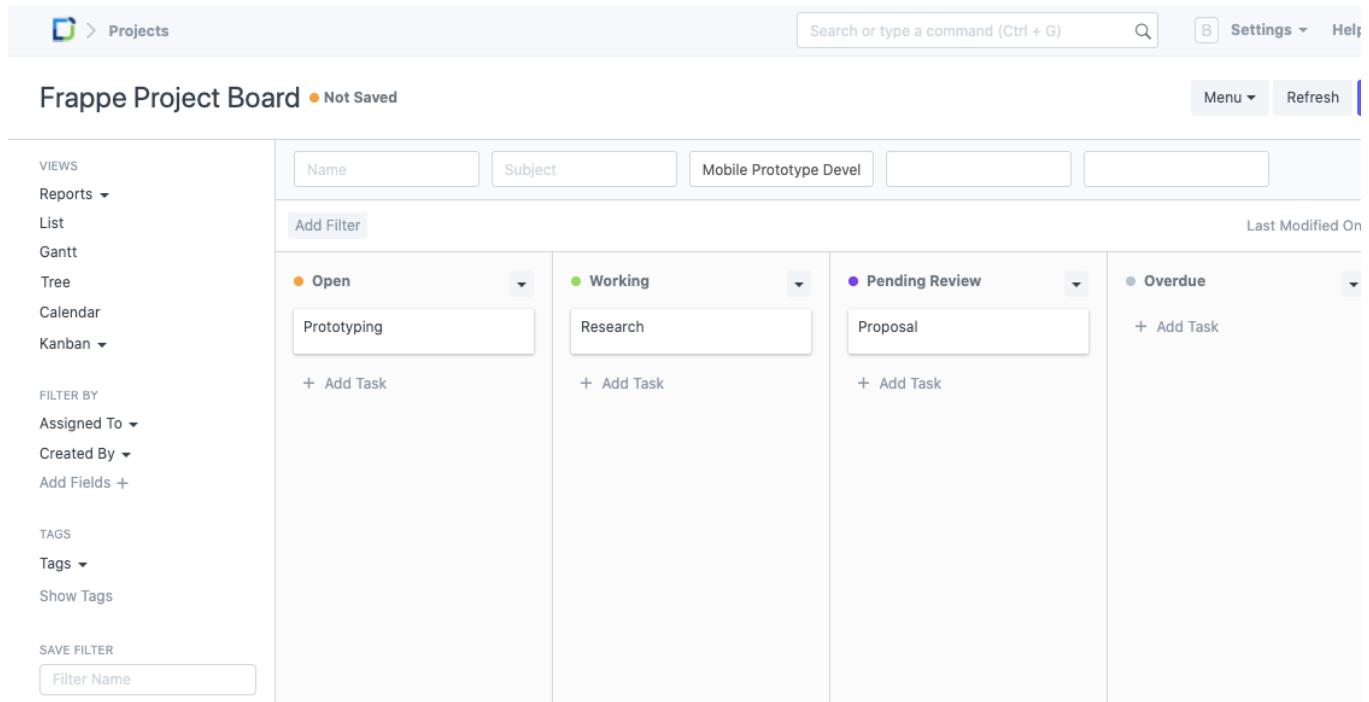
You can update the range of the chart by selecting one of Quarter Day, Half Day, Day, Week, or Month.

Dragging a task along the dates will update the start and end date of a task.

If you want to further customize the chart and make it more colorful, read this article

Kanban View

Kanban in Japanese means "billboard" or "signboard" as the task management method traces its origin back to Toyota's lean manufacturing process. In a typical kanban board setup, you have a board or wall which is divided into section which represent different stages of execution or realization. Tasks go up on the board as sticky notes or Post Its and move through the board updating its current stage in the process.



Views Reports ▾ List Gantt Tree Calendar Kanban ▾

Assigned To ▾ Created By ▾ Add Fields +

Tags ▾ Show Tags

SAVE FILTER Filter Name

Name Subject Mobile Prototype Devel

Add Filter

Last Modified On

Open	Working	Pending Review	Overdue
Prototyping	Research	Proposal	+ Add Task
+ Add Task	+ Add Task	+ Add Task	

DellSuite Kanban Board

DellSuite renders the Kanban view for tasks based on its status. You can update the status of a task by moving the representative card from one column to the next. You can also assign colors to these columns for visual reference.

Read [customizing Kanban board](#) to learn more.

Calendar View

Like the Gantt chart, the calendar view also shows the task and the planned number of days it'll take to complete. However, this one shows the task spread across your regular calendar.

Task Calendar

Views Reports ▾ List Gantt Tree Calendar Kanban ▾

Filter By Assigned To ▾ Created By ▾ Add Fields +

Tags Tags ▾ Show Tags

Save Filter Filter Name

Search or type a command (Ctrl + G) Settings ▾ Help ▾

April 2020 today month week day

SUN	MON	TUE	WED	THU	FRI	SAT
29	30	31	1	2	3	4
12a Research						
5	6	7	8	9	10	11
Research			12a Proposal			
12	13	14	15	16	17	18
12a Prototyping						
19	20	21	22	23	24	25
Prototyping						
26	27	28	29	30	1	2

Calendar View for Tasks

Time Tracking

Project time tracking in DellSuite plays a pivotal role in ensuring accurate project management and resource utilisation.

By allowing employees to log time against specific tasks or projects, DellSuite provides a clear visibility to time spent on various activities. This feature helps in monitoring project progress, identifying bottlenecks, and optimizing resource allocation. Time tracking in the project management modules allows project managers to make informed decisions based on real-time data, ultimately contributing to more efficient project execution and successful outcomes.

Activity Type

Activity Type in DellSuite helps you maintain different types of activities against which a Timesheet can be made.

To access Activity Type, go to,

Home > Projects > Time Tracking > Activity Type

Activity Type			
List View ... + Add Activity Type			
Filter Last Updated On			
ID	Status	Activity Type	5 of 5
<input type="checkbox"/> ID	Enabled	Planning	1y 0 · Heart
<input type="checkbox"/> Planning	Enabled	Research	1y 0 · Heart
<input type="checkbox"/> Research	Enabled	Proposal Writing	1y 0 · Heart
<input type="checkbox"/> Proposal Writing	Enabled	Execution	1y 0 · Heart
<input type="checkbox"/> Execution	Enabled	Communication	1y 0 · Heart
<input type="checkbox"/> Communication			

1. How to create Activity Type

1. Go to the Activity Type List and click on New.
2. Add the subject of the Activity Type.
3. Specify 'Default Costing Rate' if any.
4. Mention 'Default Billing Rate' is applicable.
5. Save.

By default, the following Activity Types are created in DellSuite.

- Planning
- Research
- Proposal Writing
- Execution
- Communication

Further, The Default Costing Rate and the Default Billing Rate for Individual Employees can also be configured using Activity Cost.

Activity Cost

Activity Cost records the per-hour billing rate and costing rate of an Employee against a particular Activity Type.

The system pulls this rate while making Timesheets. It is used to determine the Project Cost.

Ronn Stark for Designing the product

PROJ-ACC-00002

Comments	1	Activity Type	Employee Name
Assigned To		Designing the product	Ronn Stark
Attachments		Employee	HR-EMP-00014
Tags		Billing Rate	Costing Rate
Reviews		500.00	1,000.00
Shared With		per hour	per hour

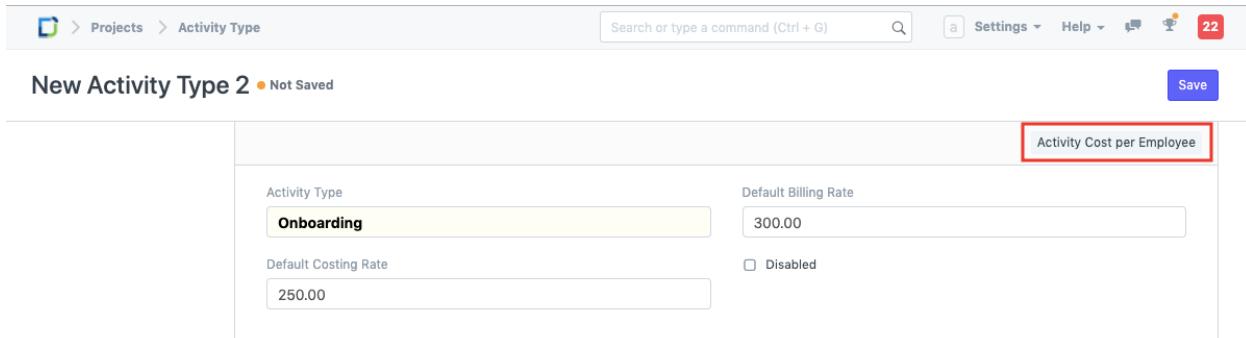
To access Activity Cost, go to,

Home > Projects > Time Tracking > Activity Cost

1. How to create Activity Cost

1. Go to the Activity Cost list and click on New.
2. Add the name of the Employee for whom you are configuring the Activity Cost.
3. Add the Costing Rate and the Billing Rate for the Employee.
4. Save.

Alternatively, an Activity Cost can also be created via the Activity List.



New Activity Type 2 • Not Saved

Activity Type	Default Billing Rate
Onboarding	300.00
Default Costing Rate	<input type="checkbox"/> Disabled
250.00	

Timesheet

A Timesheet is the record of the number of hours spent by an employee on completion of each task.

The Timesheet can also be used to calculate the billable towards an employee, to calculate their salaries, or to track an employee's contribution towards a Project or a Task.

In DellSuite, a Timesheet can have an account of a particular employee working on multiple Tasks or Projects in a tabular format.

TS-2019-00013 • Submitted

Comments 2 Create Sales Invoice

Assigned To Company Status
Assign + Unico Plastics Inc. Submitted

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

Heart You edited this 3 days ago

Heart You created this 3 days ago

EMPLOYEE DETAIL Start Date 22-09-2019
End Date 22-09-2019

Time Sheets

	Activity Type	From Time	Hrs	Project	Bill	
<input type="checkbox"/>	1 Planning	22-09-2019, 1:08 p...	8	Mobile Prototype Development	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>

Total Working Hours 8

To access Timesheet, go to,

Home > Projects > Time Tracking > Timesheet

1. How to create a Timesheet

1. Go to Timesheet list and Click on New.
2. Enter the Company name and the Employee Code.
3. Add the following details to the field 'Time Sheets'.
 - **Activity Type:** Add the type of activity for which the Time Sheet has been created.
 - **From Time:** Enter the date and time at which the work was started.
 - **Hrs:** Enter the number of hours for which this Time Sheet has been created. One Timesheet can be used to track the work hours on multiple days as well.
 - **Project:** If this Time Sheet needs to be tagged to a particular Project, you can add the name of the Project here.
 - **Bill:** This box needs to be checked if this particular Time Sheet is a billable.
4. Click on 'Add Row' to add more such Time Sheets.
5. Save.

6. After saving the Timesheet, according to the details entered in the different Time Sheets, the Start Date, End Date and the Total Working Hours will get updated automatically.
Click Submit.

1.1. Alternatively, a Timesheet can also be created from a Task in the following way:

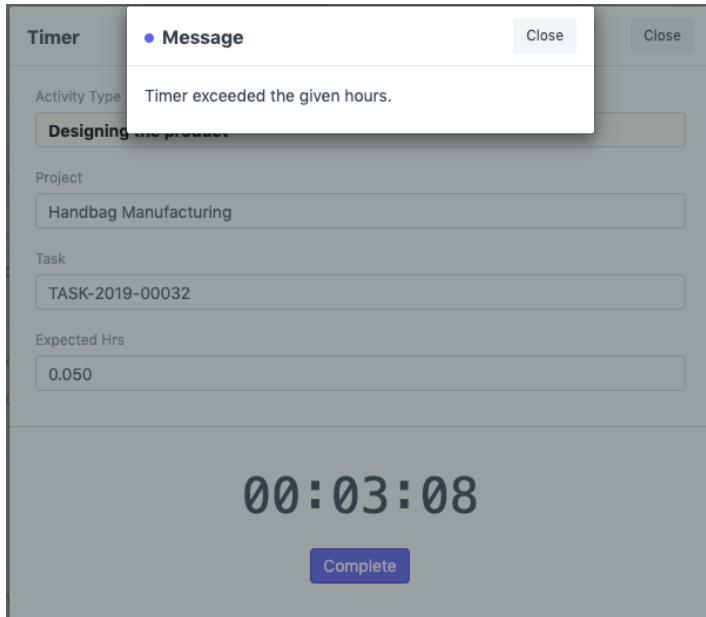
1. Go to the Task for which you want to create a new Timesheet.
2. Go to 'Timesheet' under the Activity section on the Dashboard. The plus icon '+' here would re-direct you to the Timesheet creation page.
3. Follow the steps to create a Time Sheet.

1.2. Timer in Timesheet

A Timer can be used to record the actual time taken by an employee to finish a particular activity in a Timesheet.

1.2.1. *Steps to start a Timer:*

- In a Timesheet On clicking **Start Timer** a dialog box pops up and you are required to enter the following details:
 - **Activity Type:** The Activity for which you are recording the Time.
 - **Project:** The Project for which you are creating the Timesheet.
 - **Task:** The Task for which you are recording the time in the Timesheet.
 - **Expected Hrs:** Enter the number of hours that you expect the Task to finish in.
- Once you have completed the Task, click on Complete. A new entry will be created in the Timesheet, and the time will get recorded as a Time Sheet in the Time Sheets Table in the Timesheet.
- If the time exceeds the 'Expected Hrs', an alert box appears.



1.3. Additional Options while creating the Timesheet

The Time Sheet when expanded, allows you to enter the following details to it:

- **Expected Hours:** Enter the tentative time required to complete the Tasks on the Time Sheets.
- **To Time:** Enter the date and time at which the work was completed.
- **Completed:** This box needs to be checked if the Task has been completed while submitting the Timesheet.
- **Task:** If this Time Sheet needs to be tagged to a particular Task, you can do it here.
- **Billing Hours:** This number of hours for which the customer needs to be billed for this Timesheet.
- **Billing Rate:** The rate at which the customer needs to be billed for this work.
- **Costing Rate:** This is the actual cost of work done. It is fetched from the activity cost (per employee) or from activity type and can be edited.
- **Billing Amount:** The billing amount gets auto-calculated based on the billable number of hours and the billing Rate.
- **Costing Amount:** The costing amount gets auto-calculated based on the number of hours and the costing rate.

TS-2019-00009 Not Started

Editing Row #1

Activity Type: Execution

From Time: 11-09-2019 13:08:1

Expected Hrs: 0.000

Hrs: 5.000

To Time: 11-09-2019 18:08:1

Completed

Project: Mobile Prototype Development

Task:

Bill

Billing Hours: 5.000

Billing Rate: 200.00

Costing Rate: 150.00

Billing Amount: ₹ 1,000.00

Costing Amount: ₹ 750.00

Save

2. Features

2.1 Billing Details

- **Total Billable Hours:** Based on the Timesheet, the Total Billable Hours will be auto-fetched here.
- **Total Billable Amount:** Based on the Timesheet, the Total Billable Amount will be auto-fetched here.
- **Total Billed Hours:** Once the Timesheet has been submitted, you will get an option to create a Sales Invoice from the Timesheet. The number of hours for which the Customer shall be billed will be fetched over here, and once the Sales Invoice is submitted, the Total Billed Hours will be fetched.
- **Total Billed Amount:** In a similar fashion as how the Total Billed Hours are fetched, the Total Billed Amount will also be fetched.
- **Total Costing Amount:** Based on the Timesheet, the Total Costing Amount, as specified by the Employee gets tagged here.
- **% Amount Billed:** Once the Timesheet is submitted, and a Sales Invoice is created from the Timesheet, the percentage of the Amount out of the Total Billable Amount which has been amounted for the Total Billed Amount gets calculated and is reflected here.

BILLING DETAILS ^	
Total Billable Hours	Total Billable Amount
2	₹ 1,000.00
Total Billed Hours	Total Billed Amount
2	₹ 1,000.00
Total Costing Amount	% Amount Billed
₹ 2,000.00	100%

3. After Saving the Time Sheet

Once a Timesheet is saved and submitted, the details like Billing Rate and Costing rate get locked, and cannot be changed. The following DocTypes can be created after submitting a Timesheet.

- Sales Invoice
- Salary Slip