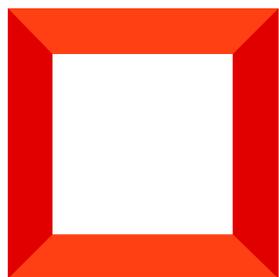
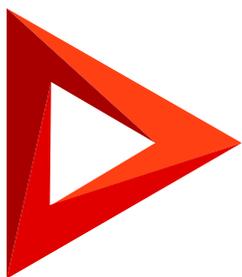


Projects

Version 7.18



This documentation is provided under restrictions on use and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this documentation, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Table of Contents

Create a project	4
Add a new project	4
Configure the project structure	5
Start a project and track its execution	6
Manage project tasks	6
Add a root project task	6
Add task resources	7
Change the task timeframe	8
Manage project resources and budget	8
Add a resource	8
Add a cash flow	9
Calculate financial indicators	10

Create a project

PRODUCTS: SALES CREATIO

For new Creatio instances this functionality is available for Creatio version 8.0.9 and earlier. Existing Creatio instances keep the Classic UI section after updating to Creatio version 8.0.10 and later.

A project is an activity intended to achieve specific results, for example, create a new product or develop a new service. Thus, a project can involve constructing a house, developing a software product, or implementing a new automated system in the company.

Use the [*Projects*] section to form a project structure, plan working time, allocate necessary resources, track deadlines, and keep a record of expenses.

This section has several pre-set [quick filters](#):

- By project start and end date (the [*Start*] and [*Worked till*] fields of the project page). The project will be displayed in the section if the dates in the filter fall to the project time period.
- By owner (the [*Owner*] field of the project page).

Add a new project

1. Go to the [*Projects*] section.
2. Click [*New*]. This will open a new page.
3. Fill out the general project information on the page that opens:

Name	The project name. Required.
Status	Project completion status. For example, "Planned," "In progress," or "Completed." By default, set to "Planned." Required.
Owner	Employee in charge of the project. By default, set to the name of the current user. Required.

4. Fill out the key project details on the [*General information*] tab:

Account	Account and/or contact that is the project customer. Filling out one of these fields is required.
Contact	
Start date	Planned start and end dates of the project.
Due date	
Type	Type of the project. For example, "Internal project" or "Complex project." Required.
Duration	Project task duration, in hours and minutes. The field is non-editable and is calculated automatically as a sum of working hours within the planned start and end dates of the project.
Deadline	Scheduled project completion date.

5. Specify connected opportunities and contractors in the [*Connected to*] detail:

Opportunity	The opportunity as part of which to perform the project.
Supplier	The company acting as a supplier in the project. Usually, this is your company.

6. Go to the [*Attachments and notes*] tab and add more information about the project, as well as attachments and links to the web resources related to the project.

7. Click [*Save*] in the top left corner.

Note. Click [*Copy*] in the section list to copy an existing project. This will also copy all tasks related to the project. The key dates of the project copy and its subordinate tasks will be offset using the current date as the start date. For example, if the project start date is 03/01/2020, the end date is 03/15/2020 and the project was copied on 03/10/2020, the start date of the project copy will be set to 03/10/2020, and the end date - to 03/25/2020.

Configure the project structure

Set up the list of tasks related to the project implementation on the [*Structure*] tab of the project page.

To add a new project task:

1. Go to the [*Structure*] tab of the project.
2. Click **+** on the [*Structure*] details and select [*Add root project task*].

To add a subordinate task to a root task, select the root task in the detail list, and select [*Add subordinate project task*] in the detail action menu.

3. Fill out the fields on the page that opens. Learn more in a separate article: [Manage project tasks](#).
4. Click [Save].

As a result, Creatio will add a new task to the project structure.

Select a task record and click [Up] or [Down] to **move the task in the task list**. You can move items of the same level only.

Note. The filter on the [Structure] detail applies only to root tasks. Subordinate tasks are not filtered.

Start a project and track its execution

The [Status] field is set to “Planned” for a new project record. To start a project, change the field value to “In progress.”

The [Completion %] field on the [General information] tab displays the actual percentage of project completion at the moment. Set this value manually or select the [Calculate automatically] checkbox. When the checkbox is selected, the field becomes non-editable, and its value is calculated as the percentage ratio of total actual working time and total estimated working time, based on the [\[List of resources \] detail](#).

Manage project tasks

PRODUCTS: SALES CREATIO

For new Creatio instances this functionality is available for Creatio version 8.0.9 and earlier. Existing Creatio instances keep the Classic UI section after updating to Creatio version 8.0.10 and later.

The project structure consists of tasks that must be finished in time to consider the project completed.

Add root tasks and their subordinate tasks, manage task dates, assign task owners, and allocate resources required for task completion.

Add a root project task

1. In the [Projects] section, open the needed project.
2. Click the [Structure] tab.
3. Click [Add root project task] in the action menu of the [Structure] detail and populate the task page that opens:
 - a. Populate the general task information:

Name	Project task name. The field is required.
Status	Project completion status, for example, "Planned" or "In Progress." By default, the "Planned" value is set. The field is required.
Owner	Creatio user, responsible for carrying out the project task. Set to the name of the current user by default. The field is required.

b. Populate the fields on the [*General information*] tab:

Account	The customer of the project task.
Contact	The contact who is a customer of the project task.
Start date	Planned date and time for the project task.
Due date	
Deadline	Deadline for the project task.

4. Navigate to the [*Attachments and notes*] tab to add files and links related to the task. For example, add documents or useful links related to the project on the [*Attachments*] detail.

5. Click [*Save*].

As a result, a new root task will be added to the project structure.

To **add a subordinate task**, select the task on the [*Structure*] detail and click [*Add subordinate project task*] in the detail action menu. Populate the page that opens in the same manner as the root project task page.

Add task resources

1. In the [*Projects*] section, open the needed project.
2. Navigate to the [*Structure*] tab and click the needed record in the menu of the [*Structure*] detail.
3. On the page that opens, click on the [*Resources*] detail.
A resource item page open will open.
4. Populate the page fields:

Task	The task the resource is added to. This is a non-editable field.
Resource	Resource name. For example, an employee's name or role in the project: "Analyst," "Developer," or "Designer." The field is required.
Expected working time, h	The man-hours needed for the employee to complete the project.
Actual working time, h	Employee's working time actually spent on the project task. This is a non-editable field. The [<i>Calculate actual working time</i>] action automatically calculates the value for this field.

5. Click [*Save*].

As a result, a new item will be added to the resources required for task completion.

Change the task timeframe

Offset the timeframe of a project task and its subordinate project tasks for the specified time period. To do this:

1. In the [*Projects*] section, open the needed project.
2. Navigate to the [*Structure*] tab and select the needed record in the menu of the [*Structure*] detail.
3. Select [*Edit project task timeframe*] in the detail action menu.
4. On the page that opens, select "Next" or "Back" and populate the [*Quantity of days*] field to specify the number of days to offset the timeframe.
5. Click [*Save*].

As a result, the dates of the task will change accordingly.

Manage project resources and budget

PRODUCTS: SALES CREATIO

For new Creatio instances this functionality is available for Creatio version 8.0.9 and earlier. Existing Creatio instances keep the Classic UI section after updating to Creatio version 8.0.10 and later.

Add a resource

Project resources are employees or roles required to complete the project.

To add a resource:

1. Go to the [*Projects*] section and open the needed record.

2. Click **+** in the [*List of resources*] detail on the [*General information*] tab.

Project	The name of the current project. This is a non-editable field.
Name	Resource name. For example, an employee's name or role in the project: "Analyst," "Developer," or "Designer." The field is required.
Contact	A Creatio contact who will work with the project. The field is required.
Expected working time, h	Employee's planned working hours within the project. The field is non-editable and is calculated by the system automatically as a sum of all planned working hours of the project tasks within the project. Planned working time for the project task is stored on the [<i>Resources</i>] detail.
Actual working time, h	The number of hours actually spent on the project by the employee. This is a non-editable field. The [<i>Calculate actual working time</i>] action automatically calculates the value for this field.
Wage	The prime cost of the resource for the company. The field is filled in automatically if the external fee specified on the [<i>Wages</i>] detail for the selected contact is valid at the project start date.
External fee	Cost of employee's work for the customer. The field is filled in automatically if an external fee, valid at the project start date, is specified on the [<i>External fees</i>] detail for the selected contact.

3. Click [*Save*].

As a result, a new resource will be added to the plan record page.

Add a cash flow

Keep a record of the project financial operations using the [*Cash flows*] detail on the [*Financial indicators*] tab

To add a new cashflow:

1. Go to the [*Projects*] section and open the needed record.
2. Click **+** in the [*Cash flows*] detail on the [*Financial indicators*] tab.

Number	Operation sequence number. This is an automatically populated non-editable field.
Type	Type of the cash flow, for example, "Inflow" or "Outflow". The field is required.
Date	Planned or actual cash flow date.
Purpose	Cash flow purpose.
Amount, base currency	Total cash flow amount in the base currency. The field is populated by the user in the currency in which the operation was performed and is automatically recalculated taking into account the exchange rates.
Project	Name of the project the operation is related to. This is a non-editable field.
Status	Operation status - "Budget," "Completed" or "Canceled." The field is required.
Category	Cash flow category, for example, "Compensation of expenses" or "General expenses."

3. Click [Save].

As a result, a new cash flow operation will be added to the plan record page.

Calculate financial indicators_

The project's financial information is based on the data from the [*Cash flows*] and the [*List of resources*] details. When calculating the financial indicators, Creatio includes the rates from the project tasks' [*Resources*] details and the project's [*List of resources*] detail.

To calculate:

1. Go to the [*Projects*] section and open the needed record.
2. On the [*Cash flows*] detail on the [*Financial indicators*] tab, click .

As a result, the following financial indicators will be calculated:

Revenue	Expected	Expected revenue amount of the project. The calculation is done based on cash flows of the “Inflow” type that have the “Budgeted” status.
	Actual	Actual revenue amount of the project. The calculation is done based on cash flows of the “Inflow” type that have the “Performed” status.
Total outflow	Expected	Expected outflow amount of the project. The calculation is done based on cash flows of the “Inflow” type that have the “Budgeted” status.
	Actual	Actual outflow amount of the project. The calculation is done based on cash flows of the “Outflow” type that have the “Budgeted” status.
Total cost	Plan	The expected estimated cost of the project for the customer. The value is calculated as a sum of products of expected working time and external fees for the project participants.
	Actual	The actual estimated cost of the project for the customer. The value is calculated as a sum of products of actual working time and external fees for the project participants.
Prime cost	Plan	The expected estimated cost of the project for the company. The value is calculated as a sum of products of expected working time and wages for the project participants.
	Actual	The actual estimated cost of the project for the company. The value is calculated as a sum of products of actual working time and wages for the project participants.
Margin	Plan	The expected financial result of the project. The value is calculated by subtracting the expected outflows and prime cost from the project's expected revenue.
	Actual	The actual financial result of the project. The value is calculated by subtracting the actual outflows and prime cost from the project's actual revenue.
Margin, %	Plan	Percentage of expected margin to expected revenues of the project.
	Actual	Percentage of actual margin to actual revenues of the project.
Deviation	Deviation of the obtained values from the planned values. The value is calculated as a difference between actual and expected values, for example, between actual and expected revenues.	
Deviation, %	Percentage of deviation from the expected value.	

