



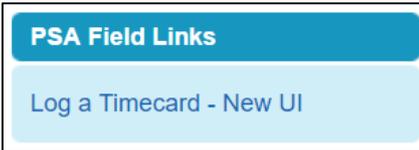
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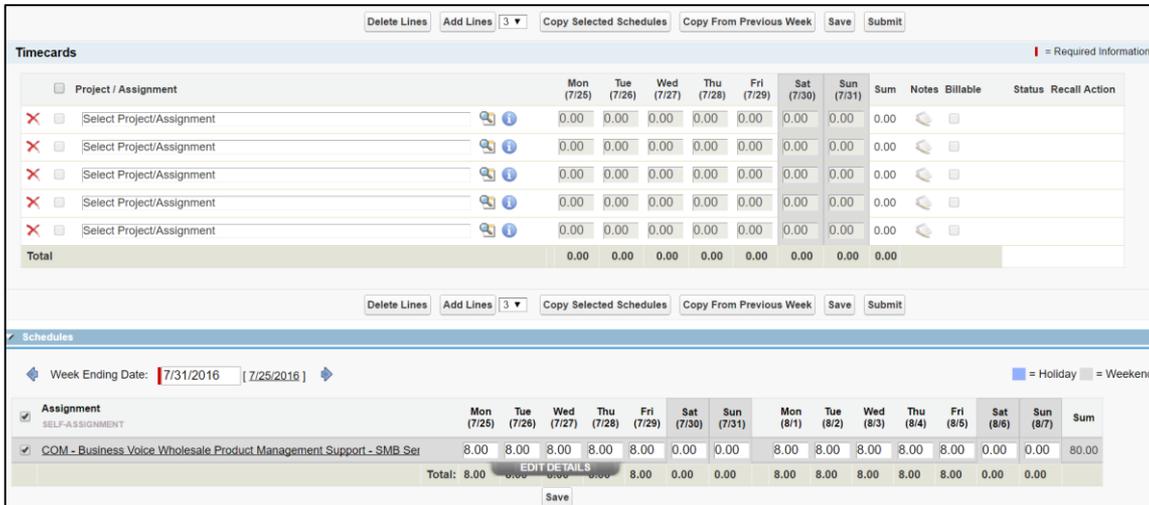
TIMECARD ENTRY IN SALESFORCE

- Timecards should be completed and submitted on a weekly basis (by Monday for the previous week). Only the Client Projects that a Resource is “assigned to” will be available for time entry. Billable Time is entered on separate “rows” for each Project/Assignment. Non-Billable time is also entered on separate rows from the list of “Global Projects.”
- The hours that a Resource is “scheduled” to work for each Project/Assignment is shown in the “Schedules” section at the bottom, and can be copied to the “Entry” section (if appropriate) to facilitate the process.
- For Employees, any Non-Billable time is entered on separate rows from the list of “Global Projects” which includes Non-billable, PTO, Holiday, Training, Business Development, Company Events, etc. For Contractors, Non-Billable time is entered on separate rows as “Non-Billable” from the list of Global Projects.
- The minimum # of hours that must be entered for a timecard “week” is 40, which equals the sum of the individual timecard rows for the week. You will not be able to submit a weekly timecard, unless the total hours for the week equals a minimum of 40.
- For Payroll purposes, EMPLOYEES ONLY are required to enter the Project Location when submitting their timecards. Project Locations are set up when the project is initially created based on where the work is expected to be performed. All projects will have a Location called “Employee’s Home Office” to be used for Billable work performed from the Employee’s home, as well as for any Non-Billable time entered (from the list of “Global Projects”).
- Timecards can be entered/submitted for a future time period.
- EMPLOYEES ONLY should submit timecards which include estimated hours through the end of the month by the 20th of each month, so that we can process month-end payroll on a timely basis.
- Contractors need to continue to submit their bi-monthly invoices to invoices@sandcherryassociates.com at least 2 business days in advance of the scheduled payment dates on the 15th and 30th of each month. The hours shown on Contractor invoices should match the billable hours that have been submitted on their timecards in Salesforce.
- All Timecards are set up to be sent to Finance (Mark Whitfield) for Approval. The Project Manager on the project will also receive an email with a copy of the timecard being submitted, however the Project Manager does not need to approve the timecard.
- When a timecard is Approved, the Resource will receive notification of the Approval. If a timecard is “Rejected” the Resource will receive notification of the reason it was rejected, and will subsequently need to make any corrections and resubmit the timecard.
- If any Hours for a Timecard submitted/approved in advance end up changing, please contact Mark Whitfield so that the Timecard can be adjusted accordingly.

1. Login into Salesforce using your Salesforce credentials
 - [Web Address: Login.salesforce.com](https://login.salesforce.com)
 - Login information = email address and password (set by you during activation)
2. Navigate to the left hand rail, and select “Log a Timecard – New UI”. This will populate the current week’s timecard



- Note: If previous timecards have not been completed, it will prompt you to complete them
3. This will display your timecard entry screen as well as your projected schedule



Timecards

Project / Assignment	Mon (7/25)	Tue (7/26)	Wed (7/27)	Thu (7/28)	Fri (7/29)	Sat (7/30)	Sun (7/31)	Sum	Notes	Billable	Status	Recall	Action
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00					

Schedules

Week Ending Date: 7/31/2016 [7/25/2016]

Assignment	Mon (7/25)	Tue (7/26)	Wed (7/27)	Thu (7/28)	Fri (7/29)	Sat (7/30)	Sun (7/31)	Mon (8/1)	Tue (8/2)	Wed (8/3)	Thu (8/4)	Fri (8/5)	Sat (8/6)	Sun (8/7)	Sum
COM - Business Voice Wholesale Product Management Support - SMB Ser	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00	8.00	8.00	0.00	0.00	80.00
Total:	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00	8.00	8.00	0.00	0.00	

- Your assigned projects and estimated schedule for the current and following week will appear in the “schedules” section below your timecard.

Schedules

Week Ending Date: [7/31/2016] [7/25/2016]

Assignment	Mon (7/25)	Tue (7/26)	Wed (7/27)	Thu (7/28)	Fri (7/29)	Sat (7/30)	Sun (7/31)	Mon (8/1)	Tue (8/2)	Wed (8/3)	Thu (8/4)	Fri (8/5)	Sat (8/6)	Sun (8/7)	Sum
COM - Business Voice Wholesale Product Management Support - SMB Ser	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00	8.00	8.00	0.00	0.00	80.00
Total:	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00	8.00	8.00	0.00	0.00	

EDIT DETAILS

Save

- To expedite entry, copy your schedule to your timecard by clicking on the “copy selected schedule” button at the top of the page. This will fill in both your project and your scheduled hours. You can also select “copy from previous week” if appropriate.

Timecard Entry

Week Ending Date: [7/31/2016] [7/25/2016] Showing timecards regardless of status Resource: [Wilhelmina Bush-Kennedy]

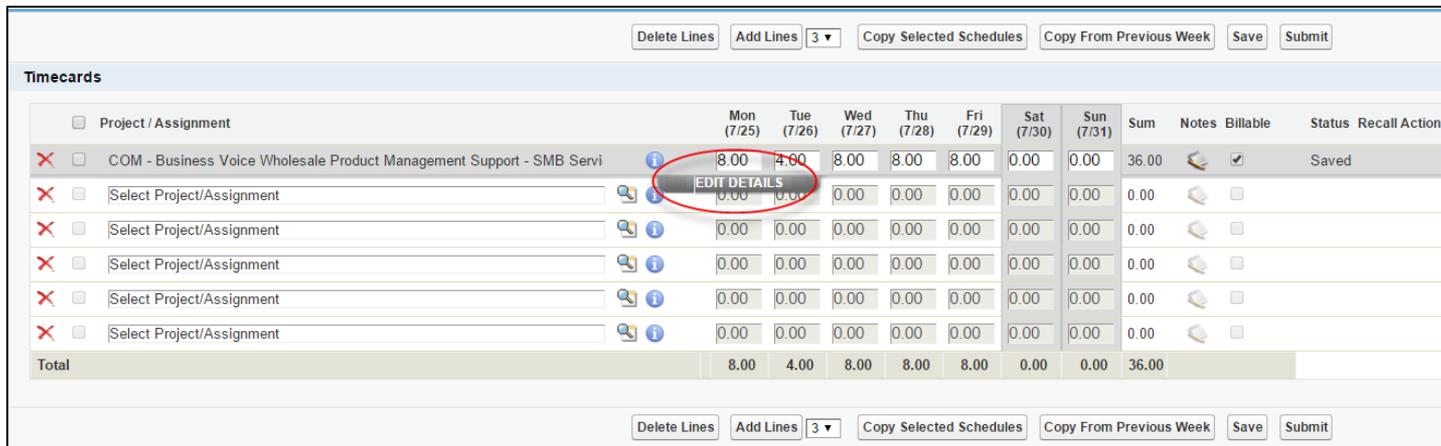
Delete Lines Add Lines [3] Copy Selected Schedules Copy From Previous Week Save Submit

Project / Assignment	Mon (7/25)	Tue (7/26)	Wed (7/27)	Thu (7/28)	Fri (7/29)	Sat (7/30)	Sun (7/31)	Sum	Notes	Billable	Status	Recall Action
COM - Business Voice Wholesale Product Management Support - SMB Servi	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00		<input checked="" type="checkbox"/>	Unsaved	
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
Total	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00				

Delete Lines Add Lines [3] Copy Selected Schedules Copy From Previous Week Save Submit

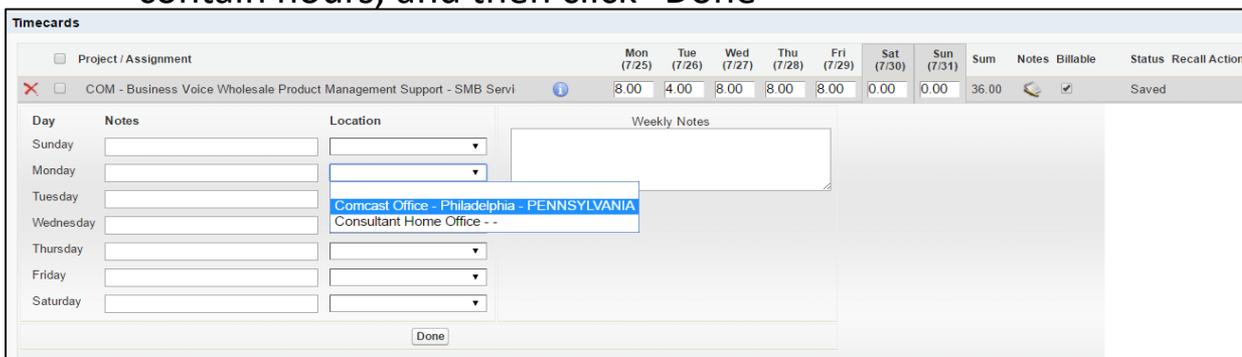
The Location at which the work was performed for your project will need to be added

5. To add the location or notes, hover over the project line and click “edit details”.



Project / Assignment	Mon (7/25)	Tue (7/26)	Wed (7/27)	Thu (7/28)	Fri (7/29)	Sat (7/30)	Sun (7/31)	Sum	Notes	Billable	Status	Recall Action
COM - Business Voice Wholesale Product Management Support - SMB Servi	8.00	4.00	8.00	8.00	8.00	0.00	0.00	36.00		<input checked="" type="checkbox"/>	Saved	
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
Total	8.00	4.00	8.00	8.00	8.00	0.00	0.00	36.00				

- This will display an entry screen for locations by day. It will include all locations related to the project, including “Employee’s Home Office”. Enter the Location for each day that contain hours, and then click “Done”

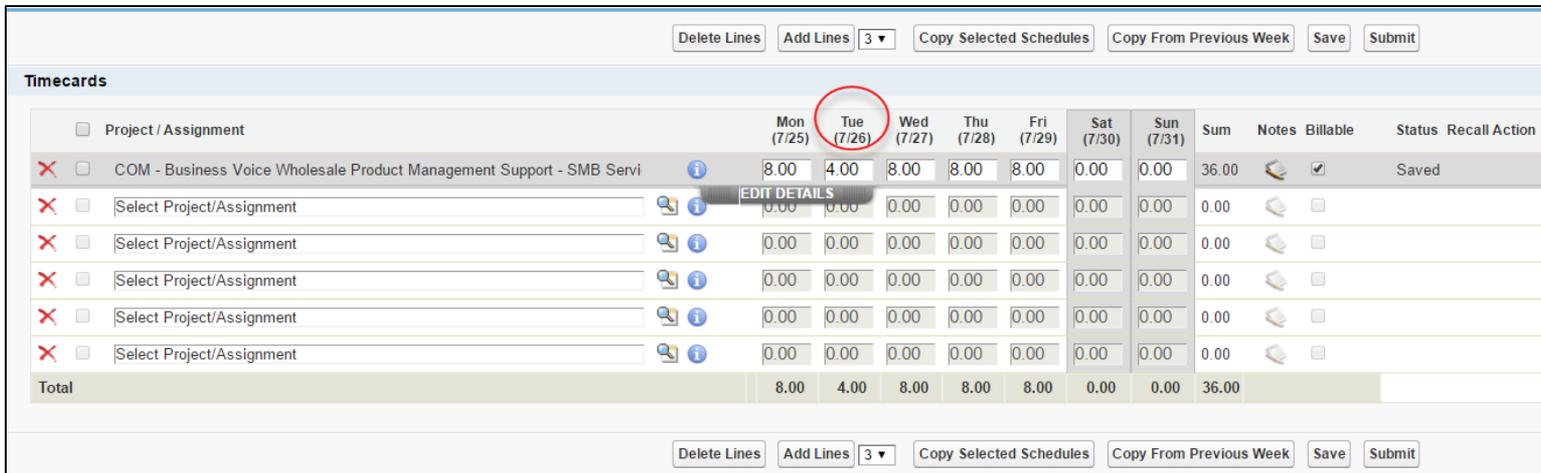


Day	Notes	Location	Weekly Notes
Sunday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Monday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tuesday	<input type="text"/>	Comcast Office - Philadelphia - PENNSYLVANIA	<input type="text"/>
Wednesday	<input type="text"/>	Consultant Home Office - -	<input type="text"/>
Thursday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Friday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Saturday	<input type="text"/>	<input type="text"/>	<input type="text"/>

For Employees, Non-Billable time is entered on separate rows from the list of “Global Projects” which includes Non-Billable, PTO, Holiday, Training, Business Development, Company Events, etc. The Location for any type of Non-Billable time should be “Employee’s Home Office.”

Contractors should enter any Non-Billable time on a separate row as “Non-Billable.”

1. Adjust in line hours for current project



Project / Assignment		Mon (7/25)	Tue (7/26)	Wed (7/27)	Thu (7/28)	Fri (7/29)	Sat (7/30)	Sun (7/31)	Sum	Notes	Billable	Status	Recall	Action
<input checked="" type="checkbox"/>	COM - Business Voice Wholesale Product Management Support - SMB Servi	8.00	4.00	8.00	8.00	8.00	0.00	0.00	36.00		<input checked="" type="checkbox"/>	Saved		
<input checked="" type="checkbox"/>	Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>			
Total		8.00	4.00	8.00	8.00	8.00	0.00	0.00	36.00					

- Search for related non-billable time by clicking on the magnifying glass and select the appropriate option

Recent Project/Assignments Search results

My Assignments

Name

[COM - Business Voice Wholesale Product Management Support - SMB Services Lead](#)

Global Projects

Name	Account
Business Development	Sand Cherry Associates
Holiday	Sand Cherry Associates
Non-Billable	Sand Cherry Associates
PTO	Sand Cherry Associates
Training	Sand Cherry Associates

- Add applicable hours by day, in line

Timecards

<input type="checkbox"/> Project / Assignment	Mon (7/25)	Tue (7/26)	Wed (7/27)	Thu (7/28)	Fri (7/29)	Sat (7/30)	Sun (7/31)	Sum	Notes	Billable	Status	Recall Action
<input checked="" type="checkbox"/> COM - Business Voice Wholesale Product Management Support - SMB Servi	8.00	4.00	8.00	8.00	8.00	0.00	0.00	36.00		<input checked="" type="checkbox"/>	Unsaved	
<input checked="" type="checkbox"/> Non-Billable	0.00	4.00	0.00	0.00	0.00	0.00	0.00	4.00		<input type="checkbox"/>	Unsaved	
<input checked="" type="checkbox"/> Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
<input checked="" type="checkbox"/> Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
<input checked="" type="checkbox"/> Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
<input checked="" type="checkbox"/> Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
Total	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00				

3. The total hours entered for a week must be a minimum of 40 hours, which is the sum of the hours from all Timecard rows. If no additional adjustments need to be made, you can either:
 - “Save” your timecard to work on at a later date
 - “Submit” your timecard: Due weekly (by the following Monday)
 - Employees: Deadline for month-end is by the 20th (pre-fill estimated hours for remainder of the month)
 - Contractors: Deadline is 2 business days prior to the schedule payment dates of 15th and the 30th each month (pre-fill estimated hours for the remainder of the month). Contractors must also submit their bi-monthly invoice for processing to invoices@sandcherryassociates.com .
 - In order to capture all Salesforce hours for the month, a Timecard submitted for the last week of the month may actually include some hours for the following month (ie. last day of the month falls on a Wednesday, therefore Salesforce timecard for that week will actually include hours through Sunday).

Timecard Entry

Week Ending Date: [7/25/2016] Showing timecards regardless of status Resource:

3

Timecards

Project / Assignment	Mon (7/25)	Tue (7/26)	Wed (7/27)	Thu (7/28)	Fri (7/29)	Sat (7/30)	Sun (7/31)	Sum	Notes	Billable	Status	Recall Action
<input checked="" type="checkbox"/> COM - Business Voice Wholesale Product Management Support - SMB Servi	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00		<input checked="" type="checkbox"/>	Unsaved	
<input checked="" type="checkbox"/> Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
<input checked="" type="checkbox"/> Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
<input checked="" type="checkbox"/> Select Project/Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		<input type="checkbox"/>		
Total	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00				

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