TIMECARD ENTRY
IN SALESFORCE
SUMMARY

- 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, Training, Business Development, and Holiday. 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 “Consultant Home Office” to be used for Billable work performed from the Consultant’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 should submit timecards which include estimated hours through the end of the month by the 22nd of each month, so that we can process month-end payroll on a timely basis. If an Employee’s actual hours end up being different from what was previously estimated and submitted on a timecard, please notify Mark Whitfield and Michelle Chamberlain so that the previously submitted timecard can be adjusted accordingly.

- Contractors need to continue to submit their bi-monthly invoices (to “invoices” email) 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.

- Resources can “save” a timecard to work on later, however once finalized it must be “submitted” for Approval.

- All Timecards are currently set up to be sent to Finance (Mark) for Approval. 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.
1. Login into Salesforce using your Salesforce credentials
   - [Web Address: Login.salesforce.com](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
HOW TO LOG TIME

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

4. To expedite entry, copy your schedule to your timecard by clicking on the “copy to timecard” button at the top of the page. This will fill in both your project and your scheduled hours.
For Employees Only, 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”

- This will display an entry screen for locations by day. It will include all locations related to the project, including “Consultant’s Home Office”. Enter the Location for each day that contains hours, and then click “Done”. Repeat this process for all timecard rows.
For Employees, non-billable time is entered on separate rows from the list of “Global Projects” which includes Non-Billable, Business Development, Holidays, PTO and Training. The Location for Non-Billable time is “Consultant’s Home Office”

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

6. Adjust in line hours for current project
7. Search for related non-billable time by clicking on the magnifying glass and select the appropriate option.

8. Add applicable hours by day, in line.
9. The sum of all of the time entered for a week must be a minimum of 40 hours. 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 22\textsuperscript{nd} (pre-fill estimated hours for remainder of the month)
     • Contractors: Deadline is 2 business days prior to the schedule payment dates of 15\textsuperscript{th} and the 30\textsuperscript{th} each month (Contractors continue to submit their bi-monthly invoices)