

Out with the old, in with the new

Projects in Teamleader Focus

Projects in Teamleader Focus: out with the old, in with the new

CONTENT WEBINAR

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CURRENT STATUS

Development and status of the new module

02

MIGRATION

Tips for a smooth transition from old to new Projects

03

COMPARISON

What is different about the new project module?

04

CHECKLIST

Prepare you and your team for a smooth migration

QUESTIONS?

QUESTIONS TAB



CURRENT STATUS

Projects: out with the old, in with the new

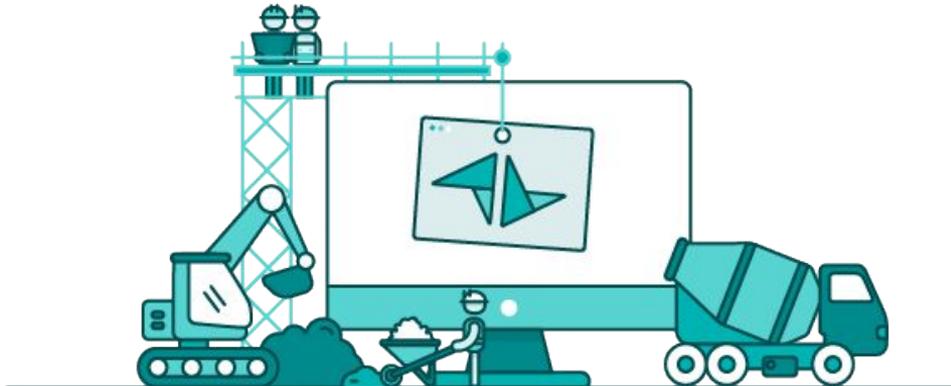
CURRENT STATUS

Development

Complete overhaul

- Smoother management
- More flexibility
- Define your workflow

🎯 A project management tool that adapts to the user's way of working and not the other way around.



THREE PILLARS

**Operational
efficiency**

**Increased
flexibility**

**Improved
cashflow**

Easily convert work from a quotation to a project to an invoice, whenever you want.

CURRENT STATUS

MIGRATION

- From old to new
- Migration batches
- Migration flow ( SOON)

: “When can I migrate?”



MIGRATION

Projects: out with the old, in with the new

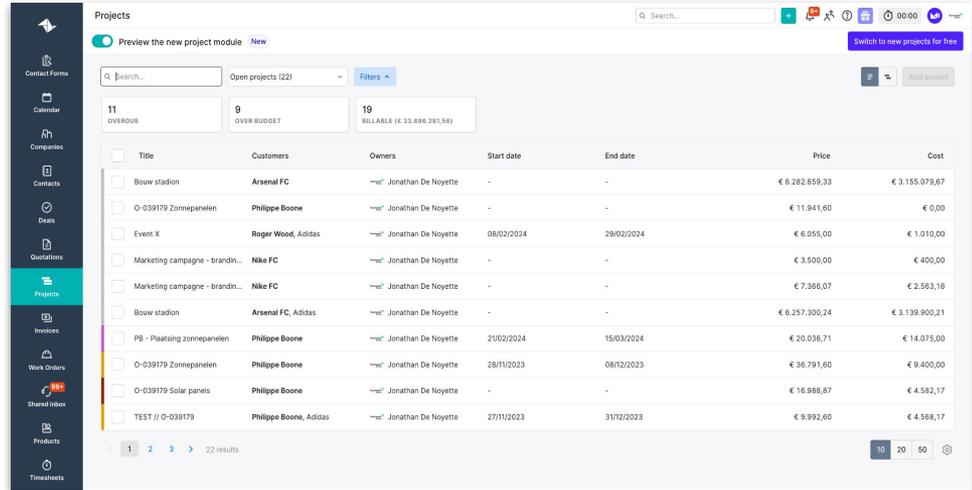
MIGRATION

MIGRATION FLOW

- Preview slider
- Project visualisation
- Only **admins** can migrate

 The migration is irreversible

 Importance of internal communication



The screenshot shows the 'Projects' module in Teamleader. At the top, there's a search bar and a 'Switch to new projects for free' button. Below that, there are summary statistics: 11 OVERDUE, 9 OVER BUDGET, and 19 BILLABLE (€ 33.896.281,58). The main part of the interface is a table of projects.

<input type="checkbox"/>	Title	Customers	Owners	Start date	End date	Price	Cost
<input type="checkbox"/>	Boww stadion	Arsenal FC	Jonathan De Noyette	-	-	€ 6.282.659,33	€ 3.155.079,67
<input type="checkbox"/>	O-039179 Zonnepanelen	Philippe Boone	Jonathan De Noyette	-	-	€ 11.941,60	€ 0,00
<input type="checkbox"/>	Event X	Roger Wood, Adidas	Jonathan De Noyette	08/02/2024	29/02/2024	€ 6.055,00	€ 1.010,00
<input type="checkbox"/>	Marketing campagne - brandin...	Nike FC	Jonathan De Noyette	-	-	€ 3.500,00	€ 400,00
<input type="checkbox"/>	Marketing campagne - brandin...	Nike FC	Jonathan De Noyette	-	-	€ 7.366,07	€ 2.563,16
<input type="checkbox"/>	Boww stadion	Arsenal FC, Adidas	Jonathan De Noyette	-	-	€ 6.257.300,24	€ 3.139.900,21
<input type="checkbox"/>	PS - Plaatsing zonnepanelen	Philippe Boone	Jonathan De Noyette	21/02/2024	15/03/2024	€ 20.036,71	€ 14.075,00
<input type="checkbox"/>	O-039179 Zonnepanelen	Philippe Boone	Jonathan De Noyette	08/12/2023	08/12/2023	€ 38.791,60	€ 9.400,00
<input type="checkbox"/>	O-039179 Solar panels	Philippe Boone	Jonathan De Noyette	-	-	€ 16.988,87	€ 4.582,17
<input type="checkbox"/>	TEST // O-039179	Philippe Boone, Adidas	Jonathan De Noyette	27/11/2023	31/12/2023	€ 9.992,60	€ 4.566,17

MIGRATION

Tips **before** the switch

CHECK YOUR ACTIVE PROJECTS

- Unfinished projects?
- Ongoing time trackings?
- Outstanding invoices?

Finish them first. Go **out with the old first** before going in with the new.



MIGRATION

Tips *after* the switch

DETERMINE YOUR WORKFLOW

- Choose your way to manage your projects
 - Work Breakdown and invoicing method
- Evaluate how you work with quotations
 - Is quotation or project your starting point?
- Create a few *dummy* projects



MIGRATION

CHECKLIST

- Important considerations when migrating
- Ensure a smooth transition
- Compare both modules



COMPARISON

Projects: out with the old, in with the new

COMPARISON

*From **old** to **new***

OVERVIEW MODULES

Projects overview	Project timeline	Project info	Work Breakdown
Tasks	Materials	Billing method	Time tracking
Link to quotations	Link to invoice	General	Settings

Support article: Old projects vs new projects

Projects

Q Search... Active

Nr	Name	Customer	Provided budget	Invoiced	Profit	Paid	End date	Phase
30	Migration project	YVES ROCHER FRANCE	-	€ 0,00	€ 0,00	€ 0,00	22/12/2023	Phase 1
29	O-039179 Panneaux solaires B...	Philippe Boone	€ 10.441,60	€ 0,00	€ 0,00	€ 0,00	21/12/2023	Matériaux
28	Abonnement - VARCOFISC	VARCOFISC sprl	€ 31.500,00	€ 21.700,00	+ € 7.560,00	€ 0,00	04/05/2023	Abonnement
25	Bijbestellingen - Testcase - Plug	Plug	€ 1.000,00	€ 0,00	€ 0,00	€ 0,00	29/03/2023	Fase 1
24	Basisbestelling / Testcase - Plug	Plug	€ 2.000,00	€ 1.423,00	+ € 258,00	€ 0,00	06/04/2023	Basisbestelling
22	copy-cabinet (modèle)		€ 25.000,00	€ 0,00	+ € 114,75	€ 0,00	26/06/2023	Phase 1
21	Agence X	Arsenal FC	€ 2.545,00	€ 1.365,00	+ € 691,25	€ 0,00	28/05/2023	Done
18	Temps restant		-	€ 0,00	+ € 330,00	€ 0,00	17/03/2023	Time tracked on other task
17	Deal €	Big company	€ 15,00	€ 0,00	€ 0,00	€ 0,00	27/02/2023	Fase 1
16	Projet Cabinet	Adidas	€ 10.000,00	€ 500,00	+ € 427,50	€ 0,00	31/05/2023	Phase 1

OLD

Q Search... Open projects (22) Filters

11 OVERDUE 9 OVER BUDGET 19 BILLABLE (€ 33.896.291,56)

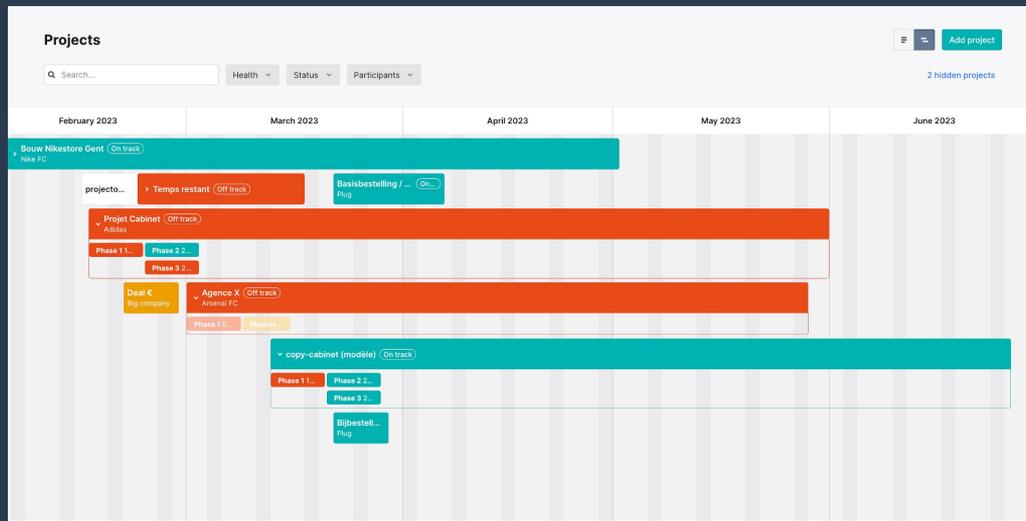
No.	Title	Customers	Owners	Budget	End date	Project status	Price	Cost	Budget progress
26	Bouw stadion	Arsenal FC	Jonathan De N...	€ 6.000.000,00	-	Open	€ 6.282.659,33	€ 3.155.079,67	€ 6.282.659,33 € 6.000.000,00
25	O-039179 Zonnepan...	Philippe Boone	Jonathan De N...	€ 10.441,60	-	Open	€ 11.941,60	€ 0,00	€ 8.851,60 € 10.441,60
24	Event X	Roger Wood, Adidas	Jonathan De N...	-	29/02/2024	Open	€ 6.055,00	€ 1.010,00	€ 460,00 -
23	Marketing campagn...	Nike FC	Jonathan De N...	€ 9.775,00	-	Open	€ 3.500,00	€ 400,00	€ 3.500,00 € 9.775,00
21	Marketing campagn...	Nike FC	Jonathan De N...	€ 9.775,00	-	Open	€ 7.366,07	€ 2.563,16	€ 7.366,07 € 9.775,00
20	Bouw stadion	Arsenal FC, Adidas	Jonathan De N...	€ 6.330.300,00	-	Open	€ 6.257.300,24	€ 3.139.900,21	€ 6.257.300,24 € 6.330.300,00
19	PB - Plaatsing zonne...	Philippe Boone	Jonathan De N...	€ 20.000,00	15/03/2024	Open	€ 20.036,71	€ 14.075,00	€ 27.044,31 € 20.000,00
17	O-039179 Zonnepan...	Philippe Boone	Jonathan De N...	€ 35.441,60	08/12/2023	Open	€ 36.791,60	€ 9.400,00	€ 39.121,60 € 35.441,60
16	O-039179 Solar pan...	Philippe Boone	Jonathan De N...	€ 10.441,60	-	Open	€ 16.988,87	€ 4.582,17	€ 16.988,87 € 10.441,60
15	TEST // O-039179	Philippe Boone, Adi...	Jonathan De N...	€ 50.000,00	31/12/2023	Open	€ 9.992,60	€ 4.568,17	€ 9.992,60 € 50.000,00

NEW

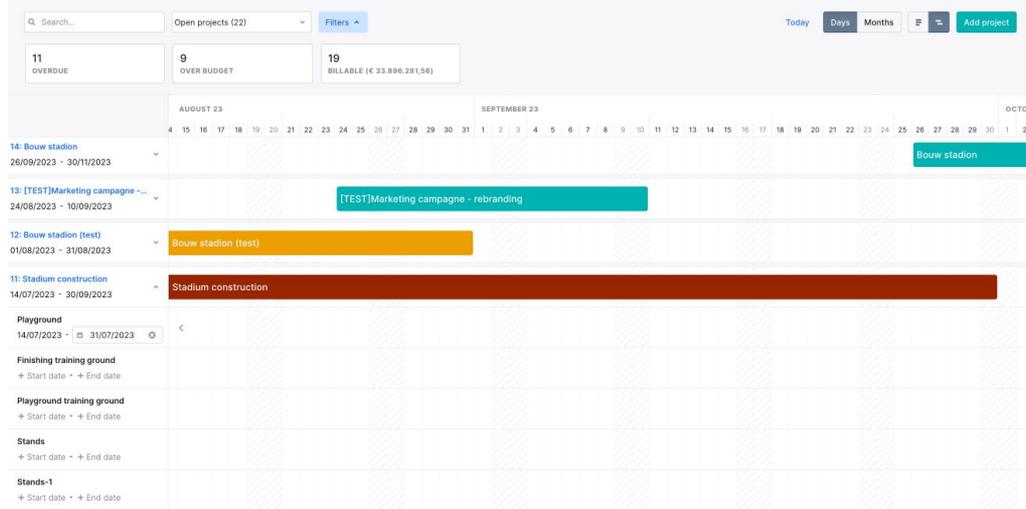
PROJECT OVERVIEW

	<u>Old</u>	<u>New</u>
Search bar	✓	✓
Filter on user	✓(segment)	✓(search)
Filter on customer	✓(segment)	✓(search)
Filter on billable projects	✓	✓
Filter on project status	✓	✓
Filter on overdue projects	✓	✓
Filter on over budget projects	✓	✓
Filter on date range	✓	🏠
Segments	✓	✗
Projects export	✓	🏠
Projects import	✓	🏠
Colour indication	✗	✓

OLD



NEW



PROJECTS TIMELINE

	<u>Old</u>	<u>New</u>
Projects show up on timeline	✓	✓
Groups show up on timeline	✓	✓
Search bar	✓	✓
Status filter	✓	✓
Assignee filter	✓	✗
Health filter	✓	✗
Colourisation	✓(health)	✓(custom)
Hide projects on timeline	✓	✗
View project/group details	✓	✓
Edit project/group details	✗	✓
Interact with timeline to edit dates	✗	✓
Move to project that is out of view	✗	✓

OLD

O-039179 Panneaux solaires Boone Philippe On track

Details

Project number: 29
 Customer: Philippe Boone
 Phase: Active Matériaux
 Dates: 07/12 - 21/12/2023
 Deal: O-039179 Panneaux solaires Boone Philippe (5)
 Quotation: O-039179 Panneaux solaires
 EXTRA INFO
 Custom field: Nee

Description

Work breakdown

Phase	Time tracked	Time estimated	Due date
Matériaux	-	17h00	14/12/2023
Installation & inspection	-	17h00	21/12/2023

Budget spent (0.0%)	Profit & loss	Time tracked	Details
- / € 10.441,60	This project doesn't contain billables or costs yet	0h00	
Time	- Track time or add materials to get real-time profit insights.	Billable	0h00
Materials	-	Non-billable	0h00

Forecast: with 28h00 of work remaining, this project will stay € 9.041,60 under budget

Phase budgets

Progress

Entire project Rollup Breakdown

30 — Remaining time (h)
— Left remaining time

NEW

O-039179 Solar panels Show header

Work breakdown 21 Kanban **Project info** Invoices 1

Budget spent (162.7%)	Margin	Time tracked
€ 16.988,87 / € 10.441,60	+ € 12.406,70	16h38
Tasks € 931,67	Price € 16.988,87	Billable (100%) 16h38
Materials € 16.057,20	Cost € 4.582,17	Non-billable (0%) 0h00

Details

DETAILS	FINANCIALS
Owners Jonathan De Noyette (You)	Billing method Time and materials
Assignees Philippe Boone	Budget € 10.441,60
Customers Teamleader	Cost budget + Budget
Company entity D-039179 Solar panels Boone Philippe	EXTRA INFO
Deals O-039179 Solar panels, O-039179-2	Champ personnalisé + Champ personnalisé
Quotations Additional solar panels order	Custom field + Custom field
Time budget + Time budget	Dit is geen standaardveld + Dit is geen standaardveld
PLANNING	Website klant + Website klant
Start date + Start date	
End date + End date	

Description

Add description

PROJECT INFO

	<u>Old</u>	<u>New</u>
Details	✓	✓
Description	✓	✓
Custom user rates	✓	✓
Forecast	✓	✗
Progress charts (Gantt, burndown, timeline)	✓	✗
Multi-currency	✓	🔒
Link invoices	✓	✓
Link deals	✓	✓
Link multiple deals	✗	✓
Link tickets	✓	✗
Link calls	✓	✗
Project custom fields	✓	✓
Auto-incrementing custom fields	✓	✗
Required custom fields	✓	✗

OLD

Open tickets +

No open tickets related to this project found.

Invoices +

No invoices related to this project found.

External costs +

No external costs linked to this project.

Co-workers ✎

Jonathan De Noyette
Division Manager
 jonathan.denoyette.demo@gmail.com
 Mobile: +32 495 67 42 34

Customer +

Philippe Boone
jonathan.denoyette.demo@gmail.com
 External access

Activities Email tracking

[+ Add note](#)

Show all ▾

Info

O-039179 Solar panels

Work breakdown 21 Kanban **Project info** Invoices 1

End date + End date

Description

Add description

Customers (1)

Philippe Boone ✎
jonathan.denoyette.demo@gmail.com

Files (0) +

No files have been added to this project. Easily add files here.

[+ Add file\(s\)](#)

Analyse van het project

[+ Analyse van het project](#)

Activities Email tracking

[+ Add note](#)

Show all ▾

Project
Jonathan De Noyette has created a project.

20/11/2023 14:05 ⋮

Show header ⋮

- Change colour
- Customise header
- View timesheet
- Export timesheet
- Set user rates
- Manage preferences
- Duplicate project
- Close project
- Delete project

NEW

KANBAN & HEADER

16 O-039179 Solar panels

Hide header

Owners	Jonathan De Noyette (You)	End date	+ End date	Margin	+ € 12.406,70
Assignees		Time estimated	94h00	Budget	€ 10.441,60
Customers	Philippe Boone	Time tracked	16h38	Cost budget	+ Budget
Deals	O-039179 Solar panels Boone Philippe	Billing method	Time and materials	Website klant	+ Website klant
Quotations	O-039179 Solar panels, O-039179-2 Additional so...	Price	€ 16.988,87 (163%)		
Start date	+ Start date	Cost	€ 4.582,17		

Work breakdown 21 **Kanban** Project info Invoices 1

Type ⊘ ⊘ M RG Add task

TO DO (8)	IN PROGRESS (3)	ON HOLD (2)	DONE (6)
<div> Installation (2p) Installatie & inspection-1 No end date 16h00 </div>	<div> Inspection post-date Installatie & inspection-1 No end date 1h00 </div>	<div> Power meter 3-Phase Materials No end date 1 Eenheid </div>	<div> Solar panels JA SOLAR 405wp Materials No end date 8 items </div>
<div> Solar panel JA SOLAR 405wp Materials No end date 4 Eenheid </div>	<div> Inspection post-date Installation & inspection No end date 1h00 </div>	<div> Installation (2p) Installation & inspection No end date 8h00 </div>	<div> Home battery Huawei 5kw Materials No end date 1 Eenheid </div>
<div> Solar panel JA SOLAR 405wp Materials No end date 4 Eenheid </div>	<div> Measurement advisor Free services No end date 1h00 </div>		<div> Motherboard Huawei Materials No end date 1 Eenheid </div>
<div> Power meter 3-Phase Materials No end date 1 Eenheid </div>			<div> Power meter 3-Phase Materials No end date 1 Eenheid </div>
<div> Installation (2p) Installation & inspection </div>			<div> Installation (2p) Installatie & inspection </div>

PROJECT INFO

	<u>Old</u>	<u>New</u>
Parties on projects custom field	✓	✗
Decision maker / Primary customer	✓	✓
Files	✓	✓
Activity feed	✓	✓
Project templates	✓	🏠
Download project report PDF	✓	🏠
Budget spent widget	✓	✓
Margin widget	✓	✓
Time tracked widget	✓	✓
Costs widget (when non-billable)	✗	✓
Billing method	✗	✓
Duplicate project	✗	✓
Project kanban view	✗	✓
Project colour	✗	✓
Customisable header	✗	✓

O-039179 Panneaux solaires Boone Philippe On track

Details	Description
<p>Project number 29</p> <p>Customer Philippe Boone</p> <p>Dates 07/12 - 31/12/2023</p> <p>Budget € 10.441,60</p> <p>Deal O-039179 Panneaux solaires Boone Phil...</p> <p>Show 4 more fields</p>	<p>There's no description yet.</p>

TIME TRACKED **8h27** TIME ESTIMATED **28h00** COMPLETED **2/6**

Filters Time

Add phase Add task

Matériaux	Time tracked	Time estimated	Due date
Panneaux solaires JA SOLAR 405wp	8h27	8h00	14/12/2023
Batterie domestique Huawei Skw	2h00	1h00	14/12/2023
Carte mère Huawei	-	1h00	14/12/2023
Compteur de puissance triphasé	-	1h00	14/12/2023

+ Add task

2/4 completed

OLD

O-039179 Solar panels

Hide header

Owners	Jonathan De Noyette (You)	End date	+ End date	Margin	+ € 12.406,70
Assignees	Philippe Boone	Time estimated	94h00	Budget	€ 10.441,60
Customers	Philippe Boone	Time tracked	16h38	Cost budget	+ Budget
Deals	D-039179 Solar panels Boone Philippe	Billing method	Time and materials	Website klant	+ Website klant
Quotations	D-039179 Solar panels, D-039179-2 Additional so...	Price	€ 16.988,87 (163%)		
Start date	+ Start date	Cost	€ 4.582,17		

Work breakdown Kanban Project info Invoices

Type	Status	Assignees	Status	End date	Price	Cost	Margin	Start date
Materials	30/12/2023	€ 8.851,60	€ 4.000,00	+ € 4.851,60	29/11/2023			
Solar panels JA SOLAR 405wp	Management	Done	-	€ 7.007,60	€ 4.000,00	+ € 3.007,60	-	
Home battery Huawei Skw	Jacques De Noyette	Done	-	€ 1.495,00	€ 0,00	+ € 1.495,00	-	
Motherboard Huawei	Frank Sinatra	Done	-	€ 250,00	€ 0,00	+ € 250,00	-	
Power meter 3-Phase	Nicardo Dos Santos	On hold	-	€ 99,00	€ 0,00	+ € 99,00	-	
Installation & inspection	30/12/2023	€ 931,67	€ 582,17	+ € 349,50	-			
General meeting (ancering branding)	No meeting	-	€ 0,00	€ 0,00	€ 0,00	-		
Installation (Zpi)	Jonathan De Noyette	In progress	-	€ 781,67	€ 547,17	+ € 234,50	-	
Inspection post-date	Rick Grimes	Done	-	€ 150,00	€ 35,00	+ € 115,00	-	

NEW

WORK BREAKDOWN

	<u>Old</u>	<u>New</u>
Individual task lines	✓	✓
Individual material / external cost lines	✗	✓
Meetings	✓	✓
Meeting placeholders	✗	✓
Work orders	✓	✓
Phases / groups lines	✓	✓
Phase / group custom fields	✓	✗
Type filter	✓	✓
Drag and drop to group	✓	✓
Drag and drop anything	✗	✓
Inline edit	✗	✓

OLD

Filters Time Add phase Add task

2 PHASES OPEN 2 PHASES OVERDUE 4 WORK TO DO 4 WORK OVERDUE 0 WORK DUE TODAY

Matériaux		Time tracked	Time estimated	Due date
Matériaux		8h27	11h00	14/12/2023
📄	Carte mère Huawei	-	1h00	14/12/2023
📄	Compteur de puissance triphasé	-	1h00	14/12/2023
+ Add task				
0/2 completed				
Installation & inspection		Time tracked	Time estimated	Due date
Installation & inspection		-	17h00	21/12/2023
📄	Installation (2p)	-	16h00	21/12/2023
📄	Inspection après date	-	1h00	21/12/2023
+ Add task				

NEW

Work breakdown 21 Kanban Project info Invoices 1

Type Status Assignees Add group Add task

Title	Assignees	Status	End date	Price	Cost	Margin	Start date
Materials	FS, JB, M, +1		30/12/2023	€ 8.851,60	€ 4.000,00	+ € 4.851,60	29/11/2023
📄 Solar panels JA SOLAR 405wp	Management M	Done	-	€ 7.007,60	€ 4.000,00	+ € 3.007,60	
📄 Home battery Huawei 5kw	Jacques De Noyette JB	Done	-	€ 1.495,00	€ 0,00	+ € 1.495,00	
📄 Motherboard Huawei	Frank Sinatra FS	Done	-	€ 250,00	€ 0,00	+ € 250,00	
📄 Power meter 3-Phase	Ricardo Dos Santos RS	On hold	-	€ 99,00	€ 0,00	+ € 99,00	
+ Add line							
Installation & inspection	A, R		-	€ 931,67	€ 582,17	+ € 349,50	
📅 General meeting: lancering branding	A	No meeting	-	€ 0,00	€ 0,00	€ 0,00	
📄 Installation (2p)	Jonathan De Noye...	In progress	-	€ 781,67	€ 547,17	+ € 234,50	
📄 Inspection post-date	Rick Orimes R	Done	-	€ 150,00	€ 35,00	+ € 115,00	
+ Add line							

CUSTOMISE COLUMNS

- Assignees
- Start date
- End date
- Status
- Billing status
- Billing method
- Quantity
- Time estimated
- Time progress
- Time tracked
- Price
- Cost
- Margin
- Unit price

WORK BREAKDOWN

	<u>Old</u>	<u>New</u>
Customisable columns	✗	✓
Column sorting	✗	✓
Assignee filter	✗	✓
Bulk select	✗	✓
Duplicate lines	✗	✓
Duplicate groups	✗	✓
Duplicate meetings	✗	✓
Duplicate bulk selection	✗	✓
Optional phases / groups	✗	✓
Custom ordering	✗	✓

OLD

Projects overview

O-039179 Panneaux solaires Boone Philippe On track

TIME TRACKED 12h27 TIME ESTIMATED 28h00 COMPLETED 2/6

Filters Time Add phase Add task

Matériaux	Time tracked	Time estimated	Due date
Matériaux	8h27	11h00	14/12/2023
Panneaux solaires JA SOLAR 405wp	0h27	8h00	Done
Batterie domestique Huawei Skw	2h00	1h00	Done
Carte mère Huawei	-	1h00	14/12/2023
Compteur de puissance triphase	-	1h00	14/12/2023
+ Add task			
2/4 completed			
Installation & inspection	4h00	17h00	21/12/2023
Installation (2p)	4h00	16h00	21/12/2023
Inspection après date	-	1h00	21/12/2023
+ Add task			
0/2 completed			

View task detail

Installation (2p)

Add description

Assigned to Jonathan De Noyette

DETAILS

Phase Installation & Inspection

Work type Administrate

PLANNING

Due date 21/12/2023

Time estimated 16h00

Time tracked 4h00

Mark as done

NEW

O-039179 Solar panels

Owners Jonathan De Noyette (You) End date + End date Margin

Assignees Philippe Boone Time estimated 94h00 Budget

Customers Philippe Boone Time tracked 16h38 Cost budget

Deals D-039179 Solar panels Boone Philippe Billing method Time and materials Website klant

Quotations O-039179 Solar panels, O-039179-2 Additional so... Price € 16.988,87 (163%)

Start date + Start date Cost € 4.582,17

Work breakdown 31 Kanban Project info Invoices 1

Type Status Assignees

Title	Assignees	Status	End date	Price
Materials			30/12/2023	€ 8.851,60
Solar panels JA SOLAR 405wp	Management	Done	-	€ 7.007,60
Home battery Huawei Skw	Jacques De Noyette	Done	-	€ 1.495,00
Motherboard Huawei	Frank Sinants	Done	-	€ 250,00
Power meter 3-Phase	Ricardo Dos Santos	On hold	-	€ 99,00
+ Add line				
Installatie & inspection			-	€ 931,67
General meeting (ancering branding)	A	No meeting	-	€ 0,00
Installation (2p)		In progress	15/05/2024	€ 781,67
Inspection post-date	Rick Grimes	Done	-	€ 150,00

Installation (2p) In progress

Installation of the solar panels

DETAILS

Assignees

Group Installatie & Inspection

Work type Development

View task details

PLANNING

Start date 01/04/2024

End date 15/05/2024

Time estimated 16h00

Time planned 08h00

View planning

Time tracked 15h38

View time trackings

Add time tracking

FINANCIALS

Billing method Work type rate

Price € 781,67 (54%)

View calculation

Unit price € 50,00/h (Work type rate)

Start timer

TASKS

	<u>Old</u>	<u>New</u>
Tasks show up on the dashboard	✓	✓
Link a project when adding a task outside of projects	✓	✓
End date	✓	✓
Start date	✗	✓
Multiple assignees on project tasks	✗	✓
Multiple assignees on loose tasks	✗	✗
Status	✗	✓
Billing method	✗	✓
Notification when being assigned to project task	✓	

OLD

WORK BREAKDOWN PROJECT INFO Search... +

External costs					
Name	Items	Unit cost	Purchase price (incl. Sales price)	Sales price (incl)	
General costs	1	€ 1.000,00	€ 1.210,00	€ 1.751,90	€ 2.119,80

NEW

16 O-039179 Solar panels

Owners: Jonathan De Noyette (You) | End date: + End date | Margin: -

Assignees: Philippe Boone | Time estimated: 94h00 | Budget: -

Customers: Philippe Boone | Time tracked: 16h38 | Cost budget: -

Deals: O-039179 Solar panels Boone Philippe | Billing method: Time and materials | Website klant: -

Quotations: O-039179 Solar panels, O-039179-2 Additional so... | Price: € 16.968,87 (163%) |

Start date: + Start date | Cost: € 4.582,17

Work breakdown 21 Kanban Project info Invoices 1

Type Status Assignees

Title	Assignees	Status	End date	Price	Unit cost
Materials	FR, BR, NL, DE	Progress	30/12/2023	€ 8.851,60	€ 4.000,00/item
Solar panels JA SOLAR 405wp	FR, NL	Done	-	€ 7.007,60	€ 7.007,60
Home battery Huawei Skw	Jacques De Noyette	Done	-	€ 1.495,00	-
Motherboard Huawei	Frank Sinatra	Done	-	€ 250,00	-
Power meter 3-Phase	Ricardo Dos Santos	On hold	-	€ 99,00	-
Installatie & inspection	FR, BR	Progress	-	€ 931,67	€ 931,67

Solar panels JA SOLAR 405wp

Done

Add material description...

Details

Assignees: FR, NL

Group: Materials

Product: 0882: JA SOLAR 405wp

Stock: 70

Planning

Start date: + Start date

End date: + End date

Financials

Billing method: Unit price

Quantity: 8

Price: € 7.007,60 (100%)

Unit price: € 875,95/item

Budget: € 7.007,60

Cost: € 4.000,00

Unit cost: € 500,00/item

MATERIALS

	<u>Old</u>	<u>New</u>
Link products to material / external cost	✓	✓
Link orders to projects	✓	✗
See stock	✗	✓

OLD

2/4 completed

Installation & inspection		Time tracked	Time estimated	Due date
Details		4h00	17h00	21/12/2023
📅 Installation (2p)	👤	4h00	16h00	21/12/2023
📅 Inspection après date	👤	-	1h00	21/12/2023

+ Add task

0/2 completed

BUDGET

Billing method Select...

Budget Time and materials

Spent budget Fixed price
Non-billable

🗑️ ✎️ Close phase

NEW

18 O-039179 Solar panels

Owners	Jonathan De Noyette (You)	End date	+ End date
Assignees		Time estimated	94h00
Customers	Philippe Boone	Time tracked	16h38
Deals	D-039179 Solar panels Boone Philippe	Billing method	Time and materials
Quotations	O-039179 Solar panels, O-039179-2 Additional so...	Price	Time and materials Bill according to spent time and materials.
Start date	+ Start date	Cost	Fixed price Bill according to a set fixed price. Non-billable Do not bill this.

Work breakdown 21 Kanban Project info Invoices 1

Type Status Assignees

Financials

Billing method Work type rate

Price User rate
Bill according to the external rate of the users that tracked time.

Unit price Work type rate
(Work type ra) Bill according to the external rate of the work type.

Budget Custom rate
Bill according to a set custom rate.

Cost Fixed price
Bill according to a set fixed price.

Unit cost Non-billable
(Internal rate) Do not bill this.

Cost budget

Financials

Billing method Unit price

Quantity Unit price
Bill according to a set unit price and quantity.

Price Fixed price
Bill according to a set fixed price.

Unit price Non-billable
Do not bill this.

Budget

Cost € 4.000,00

Unit cost € 500,00/item

BILLING METHODS

	<u>Old</u>	<u>New</u>
Phase/group: time and materials	✗	✓
Phase/group: fixed price	✓	✓
Phase/group: non-billable	✓	✓
Phase/group: project fixed price	✓	✓
Task: user rate	✓	✓
Task: work type rate	✓	✓
Task: custom rate	✓	✓
Task: fixed price	✗	✓
Task: parent fixed price	✗	✓
Individual task billing methods	✗	✓
Project: time and materials	✗	✓
Project: fixed price	✗	✓
Project: non-billable	✗	✓

OLD

Projects overview

O-039179 Panneaux solaires Boone Philippe On track

TIME TRACKED **12h27** TIME ESTIMATED **28h00** COMPLETED **2/6**

Filters Time Add phase Add task

Matériaux	Time tracked	Time estimated	Due date
Panneaux solaires JA SOLAR 405wp	6h27	8h00	14/12/2023
Batterie domestique Huawei 5kw	2h00	1h00	Done
Carte mère Huawei	-	1h00	14/12/2023
Compteur de puissance triphasé	-	1h00	14/12/2023

2/4 completed

Installation & inspection	Time tracked	Time estimated	Due date
Installation (2p)	4h00	16h00	21/12/2023
Inspection après date	-	1h00	21/12/2023

0/2 completed

View task detail

Installation (2p)

Add description

Assigned to Jonathan De Noyette

DETAILS

Phase: Installation & inspection

Work type: Administrative

PLANNING

Due date: 21/12/2023

Time estimated: 16h00

Time tracked: 4h00

Track time

Mark as done

NEW

O-039179 Solar panels

Owners: Jonathan De Noyette (You)

End date: 15/05/2024

Margin: 163%

Assesses: Philippe Boone

Time estimated: 84h00

Budget: € 16,988.87

Customers: Philippe Boone

Time tracked: 16h38

Cost budget: € 4,582.17

Deals: D-039179 Solar panels Boone Philippe

Billing method: Time and materials

Website klant

Quotations: O-039179 Solar panels, O-039179-2 Additional so...

Price: € 16,988.87 (163%)

Start date: Start date

Cost: € 4,582.17

Work breakdown Kanban Project info Invoices 1

Type	Status	Assignees	Billing method	End date	€
Materials	Done	Jonathan De Noyette, Philippe Boone	Time and materials	30/12/2023	€ 8,000.00
Solar panels JA SOLAR 405wp	Done	Jonathan De Noyette	Unit price	-	€ 1,000.00
Home battery Huawei 5kw	Done	Jacques De Noyette	Unit price	-	€ 1,000.00
Motherboard Huawei	Done	Frank Sinatra	Unit price	-	€ 1,000.00
Power meter 3-Phase	On hold	Ricardo Dos Santos	Unit price	-	€ 1,000.00
Installation & inspection	In progress	Rick Grimes	Time and materials	-	€ 1,000.00
General meeting: lancering branding	Not started	Rick Grimes	Custom rate	-	€ 1,000.00
Installation (2p)	In progress	Rick Grimes	Work type rate	15/05/2024	€ 1,000.00
Inspection post-date	Done	Rick Grimes	Custom rate	-	€ 1,000.00

Installation (2p) In progress

Installation of the solar panels

DETAILS

Assignees: Jonathan De Noyette, Philippe Boone

Group: Installation & inspection

Work type: Development

View task details

PLANNING

Start date: 01/04/2024

End date: 15/05/2024

Time estimated: 16h00

Time planned: 08h00

View planning

Time tracked: 15h38

View time trackings

Add time tracking

Assignee: Jonathan De Noyette Date: 23/04/2024

Start time: 23:08 End time: 23:30

Duration: 00h22

Billable

Cancel Add time tracking Start timer

TIME TRACKING

	<u>Old</u>	<u>New</u>
Track time on phase/group	✓	✗
Track time on a project task	✓	✓
View timesheet of a project	✓	✓
Do an export of all time trackings per project	✓	✓
Extra cost on time tracking linked to project	✓	🏗️
Add a task to a project when adding a time tracking	✗	✓
Start timer from project task	✗	✓

Contact

Company entity: Teamleader

Assignee: Jonathan De Noyette

CloudSign activity: Offline

Date created: 29/11/2023

Date accepted: 15/12/2023

DETAIL PREVIEW FOLLOW-UP

Add Project

PROJECT

Project title: D-039179 Solar panels Booi Customer: Philippe Boone

Template: Don't use Start date: 24/04/2024

End date: Budget planning: € 10.441,60

PO number: Assigned to: Jonathan De Noyette

Show on timeline:

EXTRA INFO

Custom field:

PHASE 1

Name: Materials Assigned to: Jonathan De Noyette

Billing method: Time & Material Budget planning: € 8.851,60

Start date: 24/04/2024 Due date: 01/05/2024

PHASE 2

Name: Installatie & inspectie Assigned to: Jonathan De Noyette

Billing method: Time & Material Budget planning: € 1.590,00

Start date: 02/05/2024 Due date: 08/05/2024

Cancel **Next step**

Pipeline

Sales Pipeline

Total excluding VAT: € 10.441,60

Total including VAT: € 12.634,34

Margin: + € 10.441,60 (100%)

Convert to invoice Send quotation

OLD

Convert quotation to project

7 lines selected Cancel Create new project

7 Selected Change to task Change to material Change to meeting Unit price Quantity Add to existing project

<input checked="" type="checkbox"/>	Materials	-	-	€ 8.851,60
<input checked="" type="checkbox"/>	Solar panels JA SOLAR 405wp	€ 875,95/Eenheid	8	€ 7.007,60
<input checked="" type="checkbox"/>	Home battery Huawei Skw	€ 1.495,00/Eenheid	1	€ 1.495,00
<input checked="" type="checkbox"/>	Motherboard Huawei	€ 250,00/Eenheid	1	€ 250,00
<input checked="" type="checkbox"/>	Power meter 3-Phase	€ 99,00/Eenheid	1	€ 99,00
<input checked="" type="checkbox"/>	Installatie & inspectie	-	-	€ 1.590,00
<input type="checkbox"/>	Installation (2p)	€ 90,00/h	16h00	€ 1.440,00
<input checked="" type="checkbox"/>	Inspection post-date	€ 150,00/h	01h00	€ 150,00
<input type="checkbox"/>	Free services	-	-	€ 0,00
<input type="checkbox"/>	Measurement advisor	€ 0,00/h	01h00	€ 0,00

NEW

LINK TO QUOTATIONS

	<u>Old</u>	<u>New</u>
Convert phase/group of quotation to project	✓	✓
Convert quotation to new project	✓	✓
Convert quotation to existing project	✗	✓
Convert individual quotation lines to project	✗	✓

OLD

Invoices

No invoices related to this project found.

Create Invoice for Project

Type ⁺ Company entity Customer ⁺

[Advanced filters](#)

PICK THE PHASES YOU WANT TO INVOICE:

Matériaux € 2.174,40

Installation & inspection € 1.590,00

Go

NEW

Work breakdown 21 Kanban Project info **Invoices 1**

Type Status Invoice up until Amount: € 4.534,47

Title	Billing method	Quantity	Billable amount (excl. VAT)	Subtotal (excl. VAT)	Billing status
Materials	Time and materials	-	€ 0,00	€ 8.851,60	Billed
Installatie & inspection	Time and materials	-	€ 931,67	€ 931,67	Bilable
General meeting: lancering branding	Custom rate	0 h	€ 0,00	€ 0,00	Bilable
Installation (2p)	Work type rate	15,63 h	€ 781,67	€ 781,67	Bilable
Inspection post-date	Custom rate	1 h	€ 150,00	€ 150,00	Bilable
Installatie & inspection-1	Time and materials	-	€ 0,00	€ 0,00	Bilable
Materials	Time and materials	-	€ 3.602,80	€ 3.602,80	Bilable
Solar panel JA SOLAR 405wp	Unit price	4 Eenheid	€ 3.503,80	€ 3.503,80	Bilable

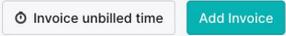
Work breakdown 21 Kanban Project info **Invoices 1**

52% Total price (excl. VAT) € 16.988,87 Amount billed (excl. VAT) € 8.851,60 Amount paid (incl. VAT) € 10.710,44

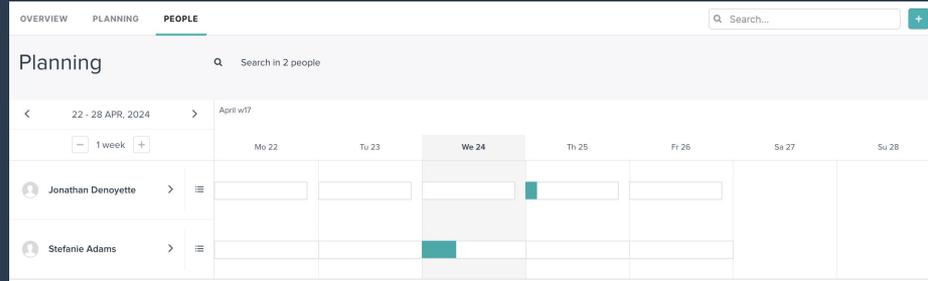
Invoice nr. Customer

2023 / 66 (TLF) Philippe Boone

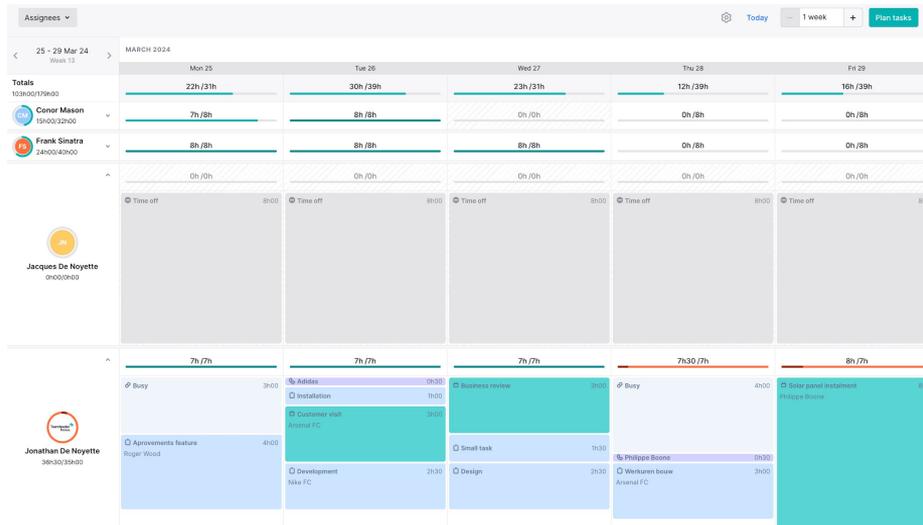
LINK TO INVOICES

	<u>Old</u>	<u>New</u>
Project time trackings show up under invoice unbilled time 	✓	✗ (alternative: use bulk invoice option instead)
Compensate for advance invoice	✓	🏠
Partially paid status	✓	✗
Project custom fields are included in the invoice remarks after conversion	✓	✗
Convert phase/group of project to invoice	✓	✓
Convert project to new invoice	✓	✓
Convert individual project lines to invoice	✗	✓
Invoice up until certain date	✗	✓
Bulk invoice projects	✗	✓

OLD



NEW



ADD-ONS

	<u>Oud</u>	<u>Nieuw</u>
Public API endpoints	✓	✓
Project webhooks	✓	✓
People planning	✓	✓
Project planning	✓	✗
Dropbox files sync	✓	✗
CloudProject	✓	
Projects appear in global search	✓	

Projects

Get deadline notifications to stay up-to-date on your schedule. Giving your client external access? Get them to login to a customized page and manage what they'll be able to see.

Preferences

Limit access to financial information on projects

Budgets are only displayed to Admins, Decision Makers and Users with Inviting. Users with access to External Costs can always see costs they added.

Default billing method

Warnings

Announce my deadlines via email

Send email when my phases go over budget

Also keep me up to date about phases I am not responsible for

Conditions for delivery notes templates

Company entity	Language	Name

Project templates

Template	Actions
Cabinet	
Project-template commissie NL	
project de 5 années	

OLD

Projects

Access

Project planning

Profit on projects

External costs

Projects

Preferences

Default billing method of projects

NEW

Projects

Access

Show financials on projects

Show costs on projects

Project preferences

PROJECT ACCESS RIGHTS

Who can edit the project info?

SETTINGS

	<u>Old</u>	<u>New</u>
Permissions: Access to projects module	✓	✓
Permissions: Access based on assignment	✓	✓
Permissions: Admin access to all projects	✓	✓
Permissions: Access to projects financials	✓ (account)	✓ (user)
Permissions: Show costs on projects	✓	✓
Default billing method	✓	✓

CHECKLIST

Projects: out with the old, in with the new

CHECKLIST

BEFORE MIGRATION:

- Check internal processes / current flow:** what is your ideal workflow?
 - Evaluate your quotations: can quotation lines one-to-one be converted to project lines?
 - Create one or more dummy projects according to your ideal scenario.
 - Make sure your active projects are up-to-date.

- Inform your colleagues**
 - General videos on how it works in our Support Centre.
 - Communicate when the new way of working will take effect
 - Tip: designate a (number of) responsible person(s) internally to collect/answer questions.

CHECKLIST

AFTER MIGRATION:

- Update the dummy projects
- Go over active projects and update what is new:
 - project header
 - Columns in the work breakdown
 - Project lines: billing method, status, assigned employees, ...

CHECKLIST

ADDITIONAL PREPARATION:

- Did you see features that are not (yet) present in the new projects?
- Documenting your new process?
- Test new workflow in advance?
- Create a test account (link in the chat)

SOON:

Download the checklist in our support centre. Available soon together with the recording.
Support centre > Training videos > Projects.

CONCLUSION

EXAMINATE

EVALUATE

COMMUNICATE

Prepare yourself and your team well for the migration so that you can fully enjoy your start with new projects.

END OF WEBINAR

Projects: out with the old, in with the new