

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

01

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

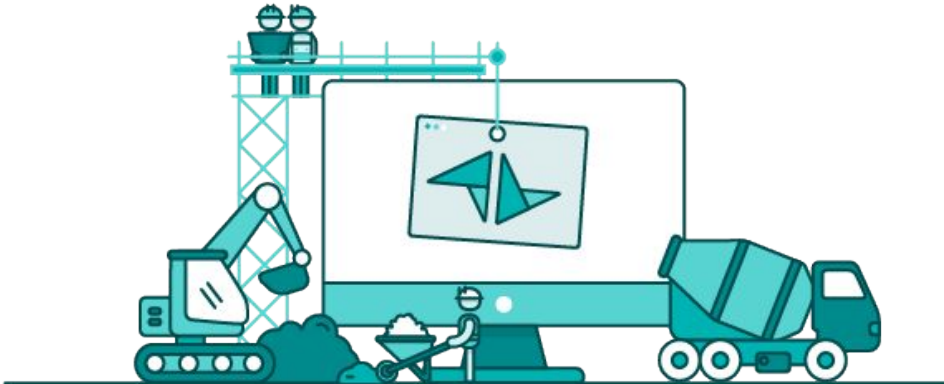
CURRENT STATUS

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**

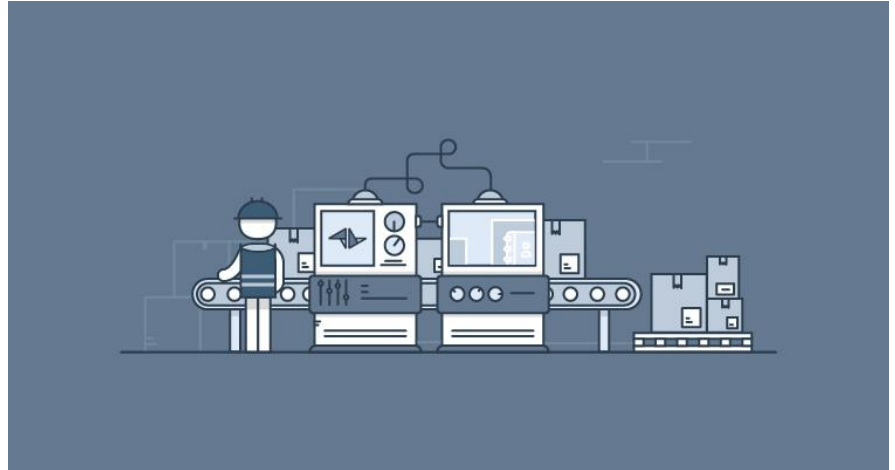
Easily convert work from a quotation to a project to an invoice, whenever you want.

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. It includes a sidebar with navigation options like Contact Forms, Calendar, Companies, Contacts, Deals, and Projects (highlighted). The main area displays a list of projects with the following data:

Title	Customers	Owners	Start date	End date	Price	Cost
Bouw stadion	Arsenal FC	Jonathan De Noyette	-	-	€ 6.282.659,33	€ 3.155.079,67
O-039179 Zonnepanelen	Philippe Boone	Jonathan De Noyette	-	-	€ 11.941,60	€ 0,00
Event X	Roger Wood, Adidas	Jonathan De Noyette	08/02/2024	29/02/2024	€ 6.055,00	€ 1.010,00
Marketing campagne - brandin...	Nike FC	Jonathan De Noyette	-	-	€ 3.500,00	€ 400,00
Marketing campagne - brandin...	Nike FC	Jonathan De Noyette	-	-	€ 7.366,07	€ 2.563,16
Bouw stadion	Arsenal FC, Adidas	Jonathan De Noyette	-	-	€ 6.257.300,24	€ 3.139.900,21
PS - Plaatsing zonnepanelen	Philippe Boone	Jonathan De Noyette	21/02/2024	15/03/2024	€ 20.036,71	€ 14.075,00
O-039179 Zonnepanelen	Philippe Boone	Jonathan De Noyette	28/11/2023	08/12/2023	€ 38.791,60	€ 9.400,00
O-039179 Solar panels	Philippe Boone	Jonathan De Noyette	-	-	€ 16.988,87	€ 4.582,17
TEST // O-039179	Philippe Boone, Adidas	Jonathan De Noyette	27/11/2023	31/12/2023	€ 9.992,60	€ 4.566,17

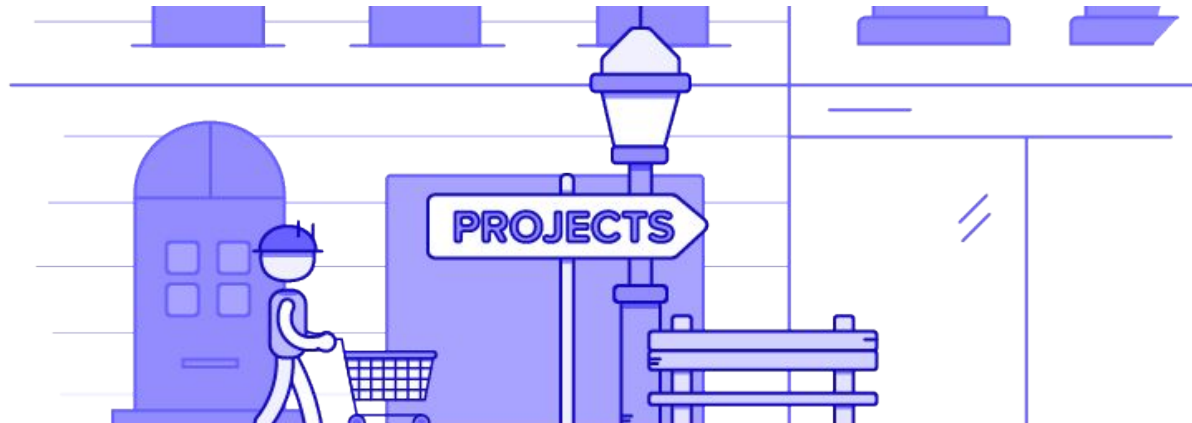
MIGRATION

*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.

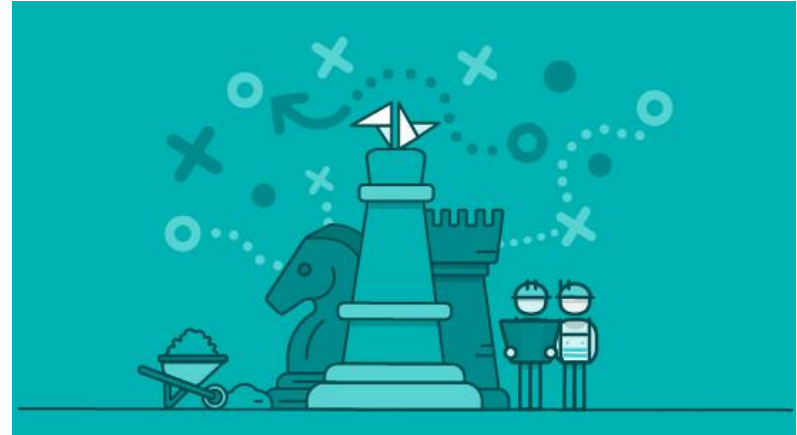


MIGRATION

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

OLD

Projects

Q Search...

Active



Export

Add project

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



Page 1 of 2



Total: 20

10

20

50



NEW

Q Search...

Open projects (22)

Filters



Add project

11
OVERDUE9
OVER BUDGET19
BILLABLE (€ 33.896.281,56)

<input type="checkbox"/>	No.	Title	Customers	Owners	Budget	End date	Project status	Price	Cost	Budget progress
<input type="checkbox"/>	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
<input type="checkbox"/>	25	O-039179 Zonnepan...	Philippe Boone	Jonathan De N...	€ 10.441,60	-	Open	€ 11.941,60	€ 0,00	€ 8.851,60 € 10.441,60
<input type="checkbox"/>	24	Event X	Roger Wood, Adidas	Jonathan De N...	-	29/02/2024	Open	€ 6.055,00	€ 1.010,00	€ 460,00 -
<input type="checkbox"/>	23	Marketing campagn...	Nike FC	Jonathan De N...	€ 9.775,00	-	Open	€ 3.500,00	€ 400,00	€ 3.500,00 € 9.775,00
<input type="checkbox"/>	21	Marketing campagn...	Nike FC	Jonathan De N...	€ 9.775,00	-	Open	€ 7.366,07	€ 2.563,16	€ 7.366,07 € 9.775,00
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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

1 2 3 22 results

10

20

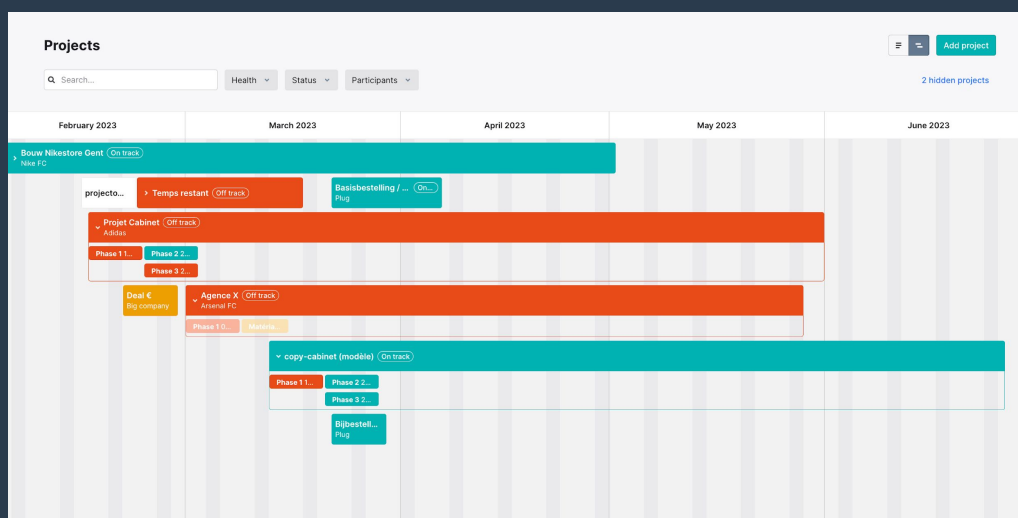
50



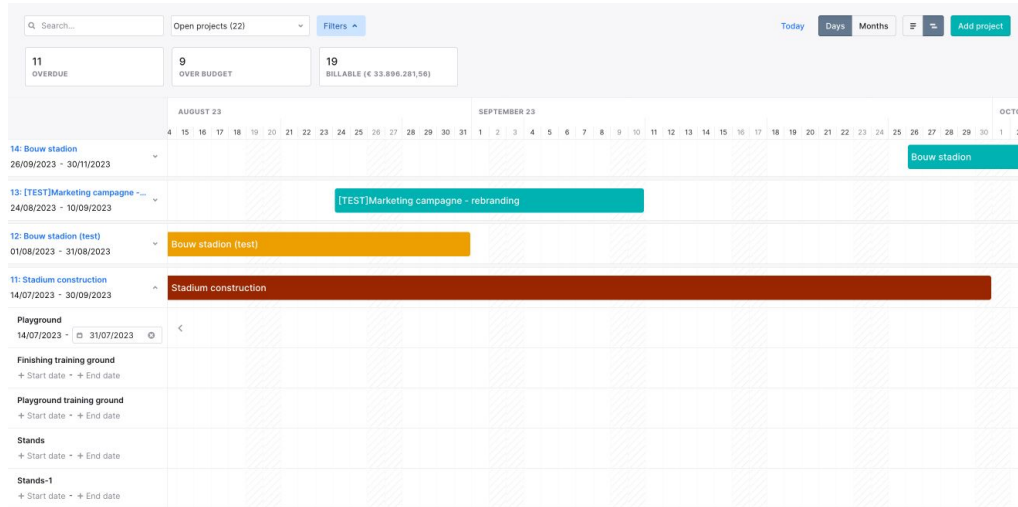
PROJECT OVERVIEW

	<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	✗	✓


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

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


Details

DETAILS

Owners

 Jonathan De Noyette (You)

Assignees

 **Philippe Boone**

Customers

Teamleader

Company entity

D-039179 Solar panels Boone Philippe

Deals

D-039179 Solar panels, D-039179-2
Additional solar panels order

Quotations

+ Time budget

Time budget

+ Start date

+ End date

FINANCIALS

Billing method

Budget

Cost budget

EXTRA INFO

Champ personnalisé

Custom field

Dit is geen standaardveld

Website klant

Time and materials

€ 10.441,60

+ Budget

+ Champ personnalisé

+ Custom field

+ Dit is geen standaardveld

+ Website klant

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

+ Add note

Show all

Email tracking

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

+ Add note

Show all

Email tracking

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	D-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

[Add task](#)



TO DO (8)

-  Installation (2p)
Installatie & inspection-1
No end date 16h00
-  Solar panel JA SOLAR 405wp
Materials
No end date 4 Eenheid
-  Solar panel JA SOLAR 405wp
Materials
No end date 4 Eenheid
-  Power meter 3-Phase
Materials
No end date 1 Eenheid
-  Installation (2p)
Installatie & inspection






IN PROGRESS (3)

-  Inspection post-date
Installatie & inspection-1
No end date 1h00
-  Inspection post-date
Installation & inspection
No end date 1h00
-  Measurement advisor
Free services
No end date 1h00

ON HOLD (2)

-  Power meter 3-Phase
Materials
No end date 1 Eenheid
-  Installation (2p)
Installation & inspection
No end date 8h00

DONE (6)

-  Solar panels JA SOLAR 405wp
Materials
No end date 8 items
-  Home battery Huawei 5kw
Materials
No end date 1 Eenheid
-  Motherboard Huawei
Materials
No end date 1 Eenheid
-  Power meter 3-Phase
Materials
No end date 1 Eenheid
-  Installation (2p)
Installatie & inspection

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	✗	✓

OLD

Projects overview

O-039179 Panneaux solaires Boone Philippe

On track

Details

Project number29

CustomerPhilippe Boone

Dates07/12 - 14/12/2023

Budget€ 10.441,60

DealO-039179 Panneaux solaires Boone Phill...

Show 4 more fields

Description

There's no description yet.

TIME TRACKED8h27

TIME ESTIMATED28h00

COMPLETED2/6

Filters

Time

Add phase

Add task

Matériaux

Details

	Time tracked	Time estimated	Due date
Panneaux solaires JA SOLAR 405wp	8h27	8h00	14/12/2023
Batterie domestique Huawei 5kw	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

NEW

O-039179 Solar panels

Hide header

OwnersJonathon De Noyette (You)

AssigneesJonathon De Noyette (You)

CustomersPhilippe Boone

DealsO-039179 Solar panels Boone Philippe

QuotationsO-039179 Solar panels, O-039179-2 Additional so...

Start dateStart date

End dateEnd date

Time estimated84h00

Time tracked16h38

Billing methodTime and materials

Price€ 16.988,87 (163%)

Cost€ 4.582,17

Margin+ € 12.406,70

Budget€ 10.441,60

Cost budget+ Budget

Website klant+ Website klant

Work breakdown

KanbanProject infoInvoices 1

TypeStatusAssignees

Add groupAdd task

Title	Assignees	Status	End date	Price	Cost	Margin	Start date
Materials	Jonathon De Noyette (You)	Progress	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 5kw	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	Ricardo Dos Santos	On hold	-	€ 96,00	€ 0,00	+ € 96,00	-
Installation & inspection	Jonathon De Noyette (You)	No meeting	-	€ 931,67	€ 582,17	+ € 349,50	-
General meeting (ancering branding)	Jonathon De Noyette (You)	In progress	-	€ 781,67	€ 547,17	+ € 234,50	-
Installation (2pl)	Jonathon De Noyette (You)	Done	-	€ 150,00	€ 35,00	+ € 115,00	-

+ Add line

Completed 3/6

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	✗	✓

NEW

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

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

Panneaux solaires JA SOLAR 405wp 8h27 8h00 Done

Batterie domestique Huawei Skw 2h00 1h00 Done

Carte mère Huawei - 1h00 14/12/2023

Compteur de puissance triphasé - 1h00 14/12/2023

+ Add task

2/4 completed

Installation & inspection

Installation (2p) 4h00 16h00 21/12/2023

Inspection après date - 1h00 21/12/2023

+ Add task

0/2 completed

+ Add phase

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

Mark as done

NEW

O-039179 Solar panels

Owners Jonathan De Noyette (You)

Assignees Philippe Boone

Customers D-039179 Solar panels Boone Philippe

Deals O-039179 Solar panels, O-039179-2 Additional so...

Quotations

Start date + Start date

End date + End date

Time estimated 94h00

Time tracked 16h38

Billing method Time and materials

Price € 16.988,87 (163%)

Cost € 4.582,17

Margin

Budget

Cost budget

Website klant

Work breakdown 21 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 Sinatta Done - € 250,00

Power meter 3-Phase Ricardo Dos Santos On hold - € 99,00

Installation & inspection

General meeting (ancering branding) No meeting - € 0,00

Installation (2p) 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

View time trackings

Add time tracking

Financials

Billing method Work type rate

Price € 781,67 (54%)

Unit price € 50,00/h

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	✓	🔔

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

O-039179 Solar panels

Owners

Jonathan De Noyette

You

Assignees

Philippe Boone

D-039179 Solar panels Boone Philippe

Customers

D-039179 Solar panels, O-039179-2 Additional so...

Deals

+ Start date

Quotations

+ Start date

Start date

End date

+ End date

Time estimated

94h00

Time tracked

16h38

Billing method

Time and materials

Price

€ 16.988,87 (163%)

Cost

€ 4.582,17

Margin

Budget

Cost budget

Website klant

Work breakdown

21

Kanban

Project info

Invoices 1

Type

Status

Assignees

Type	Status	Assignees	Status	End date	Price	Cost
<input type="checkbox"/> Title				15/05/2024	€ 16.988,87	€ 4.582,17
<input checked="" type="checkbox"/> Materials				30/12/2023	€ 8.851,60	€ 4.000,00
<input checked="" type="checkbox"/> Solar panels JA SOLAR 405wp			Done	-	€ 7.007,60	€ 4.000,00
<input checked="" type="checkbox"/> Home battery Huawei Sky		Jacques De Noyette	Done	-	€ 1.495,00	-
<input checked="" type="checkbox"/> Motherboard Huawei		Frank Sinatra	Done	-	€ 250,00	-
<input checked="" type="checkbox"/> Power meter 3-Phase		Ricardo Dos Santos	On hold	-	€ 99,00	-
+ Add line						
<input checked="" type="checkbox"/> Installatie & inspection				-	€ 931,67	€ 931,67

Solar panels JA SOLAR 405wp

Add material description...

Details

Assignees

Group

Product

Stock

Planning

Start date

End date

Financials

Billing method

Quantity

Price

Unit price

Budget

Cost

Unit cost

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

Fixed price

Non-billable

Spent budget

Close phase

NEW

18 O-039179 Solar panels

Owners

Jonathan De Noyette (You)

End date

+ End date

Assignees

Philippe Boone

Time estimated

94h00

Customers

Philippe Boone

Time tracked

16h38

Deals

O-039179 Solar panels Boone Philippe

Billing method

Time and materials

Quotations

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

Price

Start date

+ Start date

Cost

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

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

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	8h27	11h00	14/12/2023
Batterie domestique Huawei 5kw	6h27	8h00	Done
Carte mère Huawei	2h00	1h00	Done
Compteur de puissance triphasé	-	1h00	14/12/2023
	-	1h00	14/12/2023

+ Add task

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

+ Add task

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)

Assignees Philippe Boone

Customers D-039179 Solar panels Boone Philippe

Deals D-039179 Solar panels, O-039179-2 Additional so...

Quotations

Start date

End date

Time estimated 94h00

Time tracked 16h38

Billing method Time and materials

Price € 16.988,87 (163%)

Cost € 4.582,17

Margin

Budget

Cost budget

Website klant

Work breakdown Kanban Project info Invoices 1

Type Status Assignees

Type	Status	Assignees	Status	Billing method	End date	€
Materials	Done	Jonathan De Noyette	Done	Time and materials	30/12/2023	€ 8.000,00
Solar panels JA SOLAR 405wp	Done	Jonathan De Noyette	Done	Unit price	-	€ 1.000,00
Home battery Huawei 5kw	Done	Jacques De Noyette	Done	Unit price	-	€ 1.000,00
Motherboard Huawei	Done	Frank Sinatra	Done	Unit price	-	€ 1.000,00
Power meter 3-Phase	On hold	Ricardo Dos Santos	On hold	Unit price	-	€ 1.000,00
Installation & inspection	In progress	Jonathan De Noyette	In progress	Time and materials	-	€ 1.000,00
General meeting: lancering branding	No meeting	Jonathan De Noyette	No meeting	Custom rate	-	€ 1.000,00
Installation (2p)	In progress	Jonathan De Noyette	In progress	Work type rate	15/05/2024	€ 1.000,00
Inspection post-date	Done	Rick Grimes	Done	Custom rate	-	€ 1.000,00

+ Add time

Installation (2p) In progress

Installation of the solar panels

Details

Assignees

Group

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

Assigned 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	✗	✓

OLD

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

Quotation

Title

Materials

Solar panels JA SOLAR 405wp

Home battery Huawei 5kw

Motherboard Huawei

Power meter 3-Phase

Installatie & inspectie

Installation (2p)

Inspection post-date

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

Subtotal

€ 7.007,60

€ 1.495,00

€ 250,00

€ 99,00

€ 1.440,00

€ 150,00

NEW

Convert quotation to project

7 lines selected

Cancel

Create new project

Add to existing project

7 Selected

Change to task

Change to material

Change to meeting

	Unit price	Quantity	
Materials	-	-	€ 8.851,60
Solar panels JA SOLAR 405wp	€ 875,95/Eenheid	8	€ 7.007,60
Home battery Huawei 5kw	€ 1.495,00/Eenheid	1	€ 1.495,00
Motherboard Huawei	€ 250,00/Eenheid	1	€ 250,00
Power meter 3-Phase	€ 99,00/Eenheid	1	€ 99,00
Installatie & inspectie	-	-	€ 1.590,00
Installation (2p)	€ 90,00/h	16h00	€ 1.440,00
Inspection post-date	€ 150,00/h	01h00	€ 150,00
Free services	-	-	€ 0,00
Measurement advisor	€ 0,00/h	01h00	€ 0,00

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 *

Invoice based on phase

Company entity

Teamleader

Customer *

Philippe Boone

Advanced filters

PICK THE PHASES YOU WANT TO INVOICE:

Matériaux

According to used time and costs

€ 2.174,40

Installation & inspection

According to budget

€ 1.590,00

Go

NEW

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

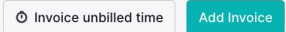
Type Status Invoice up until DD/MM/YYYY Amount: € 4.534,47 Cancel Create invoice

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	Billable
General meeting: lancering branding	Custom rate	0 h	€ 0,00	€ 0,00	Billable
Installation (2p)	Work type rate	15,63 h	€ 781,67	€ 781,67	Billable
Inspection post-date	Custom rate	1 h	€ 150,00	€ 150,00	Billable
Installatie & inspection-1	Time and materials	-	€ 0,00	€ 0,00	Billable
Materials	Time and materials	-	€ 3.602,80	€ 3.602,80	Billable
Solar panel JA SOLAR 405wp	Unit price	4 Eenheid	€ 3.503,80	€ 3.503,80	Billable

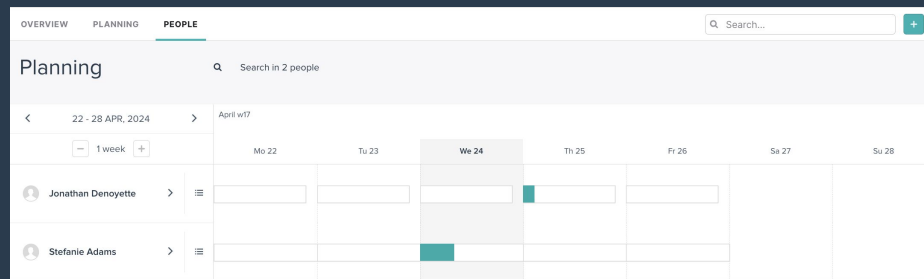
Work breakdown 21 Kanban Project info **Invoices 1**

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		

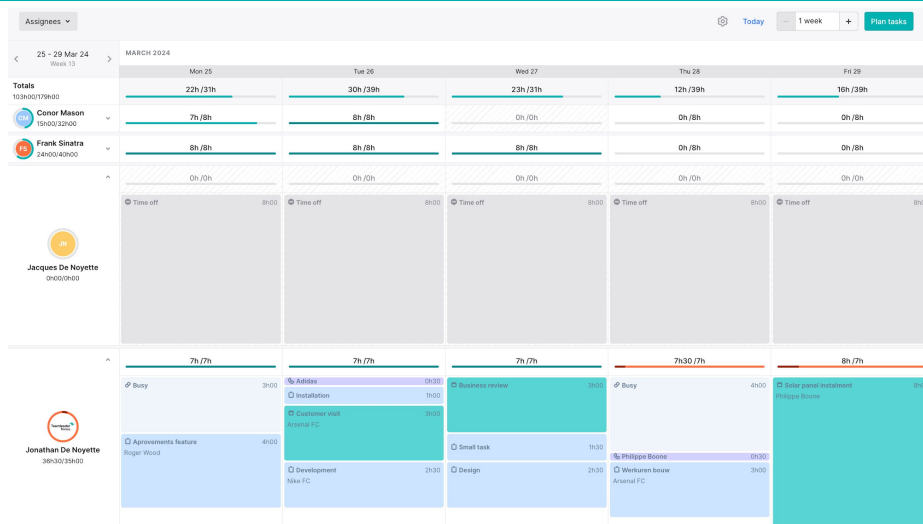
LINK TO INVOICES

	<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	✓	🔧

OLD

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 YES

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

Default billing method Time & Material

Warnings

Announce my deadlines via email YES

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	

Projects

Access

According to participation

Project planning

Profit on projects

External costs

NEW

Projects

Preferences

Default billing method of projects

Time and materials

Projects

Access

According to participation

Show financials on projects

Show costs on projects

Project preferences

PROJECT ACCESS RIGHTS

Who can edit the project info?

Owners only

Cancel

Save

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