

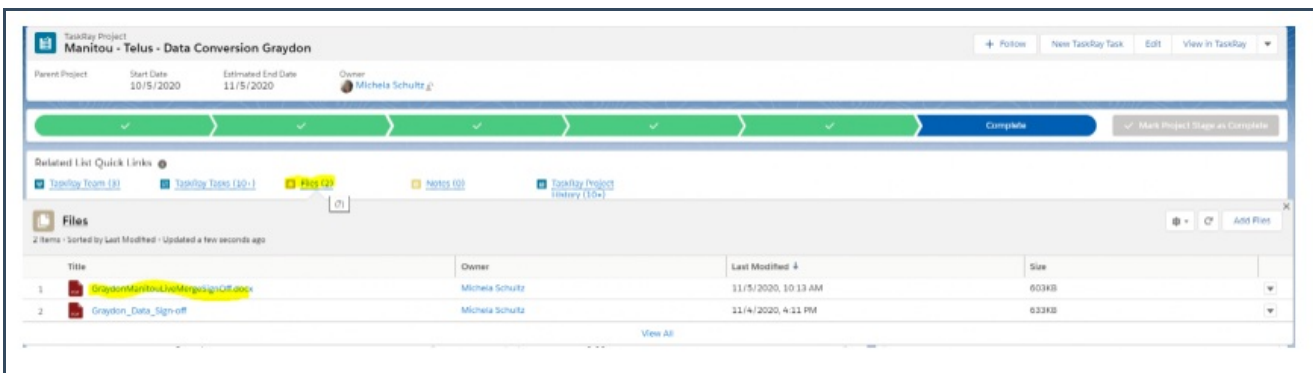
Implementations - How To Complete Project in Sales Force

01/09/2024 10:46 am EST

This guide explains how to complete and close a project in Salesforce after completing project tasks and receiving a signed copy of the Project Sign-Off from the customer (if applicable).

Step 1: Verify Project/Data Sign-off is Attached to Project

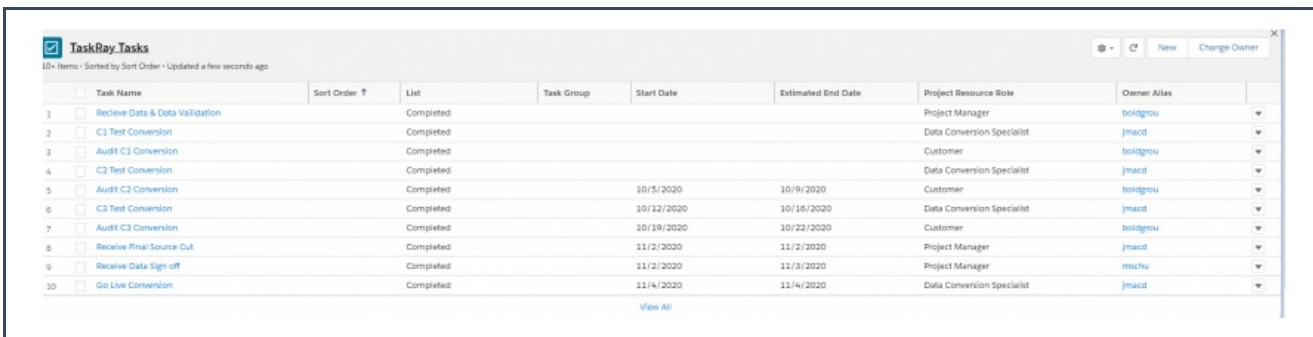
At the Project Page Find the Files Short Cut Icon and ensure the Sign-Off has been uploaded



Step 2: Verify All Tasks Have Been Completed

At the Project Level, navigate to the TaskRay Tasks Short Cut on the Project Page ensure all tasks have been marked as completed

*Note if there are over 10 tasks you will have to click the view all at the bottom of the list



Step 3: Change Project Status to Complete

From the Project Page, advance the project stages until you reach Complete status.

TaskRay Project
Manitou - Telus - Data Conversion Graydon + Follow New TaskRay Task Edit View in TaskRay

Parent Project Start Date 10/5/2020 Estimated End Date 11/5/2020 Owner Michèle Schultz

Progress bar: 6 stages (5 green, 1 blue 'Complete') Mark Project Stage as Complete

Related List Quick Links

- TaskRay Team (3)
- TaskRay Tasks (10)
- Files (2)
- Notes (0)
- TaskRay Project History (10)

Ensure that the Completed Project Information Autofills

Completed Project Information

Completed <input checked="" type="checkbox"/>	Actual Duration	32
Actual Completion Date	11/5/2020	