



Simple Timesheet User Documentation

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Employees

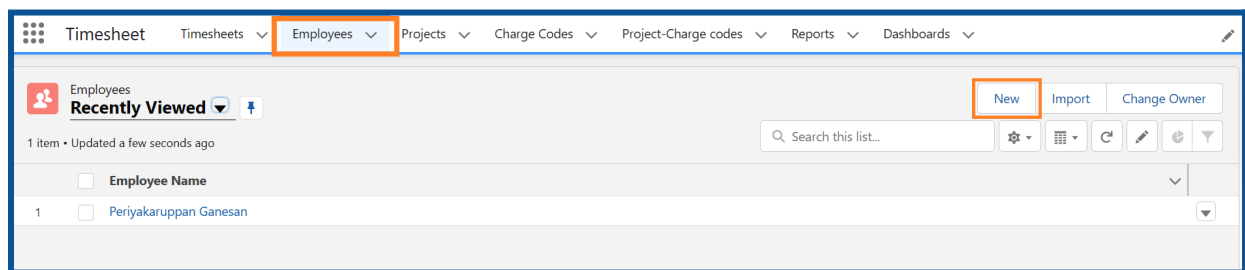
Employees can only be created by the HR Admin.

Go to the Timesheet App, click on the Employees tab, and then click the New button. Employee records are created by the HR Admin when an employee joins the organization.

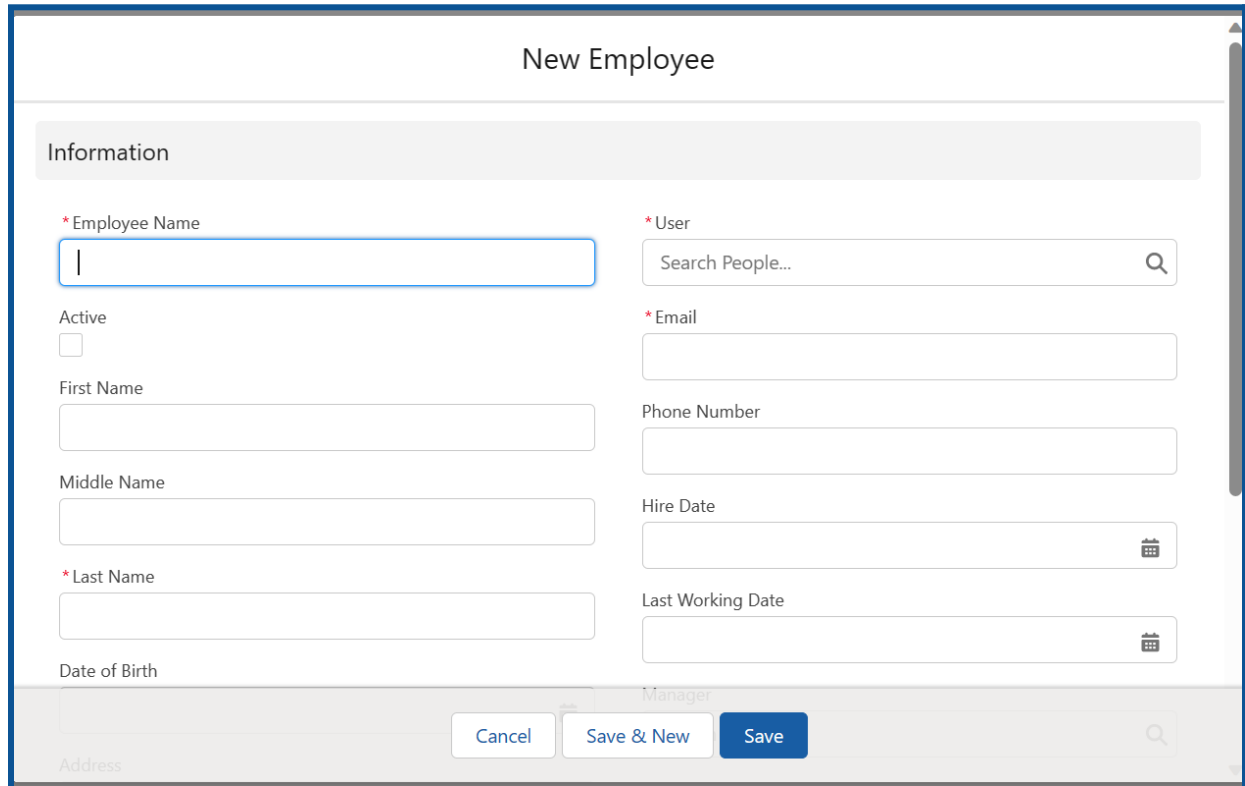
The required fields for creating an Employee are:

- . Employee Name
- . Last Name
- . User
- . Email
- . Employment Type

In Employee records Name, Email, Manager fields auto populates from related User record. To update any of these fields, the User record needs to be updated first.



The screenshot shows the 'Employees' tab in the Timesheet app. The top navigation bar includes 'Timesheet', 'Timesheets', 'Employees' (highlighted with an orange box), 'Projects', 'Charge Codes', 'Project-Charge codes', 'Reports', and 'Dashboards'. Below the navigation bar, there's a header for 'Employees' with a 'Recently Viewed' dropdown and a 'New' button (highlighted with an orange box). A search bar and several icons are also present. The main content area shows a list of employees with one item: 'Periyakaruppan Ganesan'.



The screenshot shows the 'New Employee' form. The title 'New Employee' is at the top. Below it is the 'Information' section. The form contains several fields: 'Employee Name' (required, marked with a red asterisk), 'User' (required, marked with a red asterisk, with a search icon), 'Active' (checkbox), 'First Name', 'Middle Name', 'Last Name' (required, marked with a red asterisk), 'Date of Birth', 'Email' (required, marked with a red asterisk), 'Phone Number', 'Hire Date' (with a calendar icon), and 'Last Working Date' (with a calendar icon). At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons. A 'Manager' field with a search icon is also visible at the bottom right.

The Employee Name entered by the user will be overwritten like this “<First Name>, <Last Name>”.

Projects

Projects can only be created by the HR Admin. Go to the Timesheet App and click on **Projects** tab and then click the **New** button.

The image shows two screenshots from the Timesheet app. The top screenshot displays the 'Projects' tab in the navigation menu, which is highlighted with an orange box. Below the navigation bar, the 'Projects' section is visible, showing a 'Recently Viewed' list with two items: 'Albany' and 'DBT'. A 'New' button is highlighted with an orange box in the top right corner of the Projects section. The bottom screenshot shows the 'New Project' form. It has a title 'New Project' and a section titled 'Information'. The form contains the following fields: 'Project Name' (required, marked with an asterisk), 'Active' (checkbox), 'Start Date' (calendar icon), 'End Date' (calendar icon), and 'Billable' (required, marked with an asterisk, with a dropdown menu showing '--None--'). At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

Every Project has to be either Billable or Non Billable.

When you add **Project Activities** under a specific **Project**, those activities become linked to that project. Later, when you open or select that project record, the related activities will automatically appear under the **Activity** tab on the Project page.

Project DBT

Active ☒ Start Date End Date

Details Activity Employee

Project Name DBT Active ☒

Start Date End Date

Billable Yes

Created By anantha rajesh, 9/7/2025, 2:42 AM Last Modified By anantha rajesh, 9/7/2025, 9:26 AM

Project Activities (2) 2 Items • Updated 2 minutes ago

☐ Project Activity Name

1	☐ Abc
2	☐ test

[View All](#)

Project - Employees

Project Employees can only be created by the HR Admin. The purpose of this object is to assign projects with employees. Go to the Timesheet App and click on the Projects **Employee** tab and then click the **New** button.

Project Employees All

6 items • Sorted by Project Employee Name • Filtered by All project employees • Updated a few seconds ago

[New](#) [Import](#) [Printable View](#)

	Project Employee Name ↑	Project	Employee
1	☐ PE-000004	DBT	Dummy User PK
2	☐ PE-000005	Client One	Saichand Ballagiri
3	☐ PE-000006	DBT	P K
4	☐ PE-000007	Client Two	Saichand Ballagiri
5	☐ PE-000008	DBT	Saichand Ballagiri
6	☐ PE-000011	Timesheet	P K

HR Admin can use the below form to link employees to projects so that time tracking and billing can be recorded accurately. The Employee must already exist in the **Employees** tab before being assigned to a project.

Only active projects will show in the Project lookup field.

If the Project is selected as Billable, the Hourly rate field will be used to calculate the Billing amount in the Timesheet.

New Project Employee

* = Required Information

Information

Project Employee Name

* Employee

Search Employees...

* Project

Search Projects...

Hourly Rate

Cancel

Save & New

Save

Charge Codes

Charge Codes can only be created by the HR Admin. Go to the Timesheet App and click on **Charge Codes** tab and then click the **New** button

Timesheet

Timesheets

Employees

Projects

Charge Codes

Project-Charge codes

Reports

Dashboards

Charge Codes

Recently Viewed

0 items • Updated a few seconds ago

New

Import

Change Owner

Search this list...

Charge Code Name

New Charge Code

Information

* Charge Code Name

Owner

Saichand Ballagiri

Description

Cancel

Save & New

Save

Project - Charge Codes

HR Admin can associate the Project and the Charge Code by creating Project Charge Codes. Go to the Timesheet App and click on **Project Charge Codes** tab and then click the **New** button.

Timesheet

Timesheets

Employees

Projects

Charge Codes

Project-Charge codes

Reports

Dashboards

Project-Charge codes

Recently Viewed

0 items • Updated a few seconds ago

Q Search this list...

New

Import

Project-Charge code Name

New Project-Charge code

Information

* Project-Charge code Name

* Start Date

* Project

Search Projects...

* End Date

* Charge Code

Search Charge Codes...

Description

System Information

Created By

Last Modified By

Cancel

Save & New

Save

Timesheets

Timesheets are automatically created for all the active Employees on Monday at 12:00 AM with the name format as **Timesheet for 2025-06-30 to 2025-07-06** (Monday to Sunday).

If a new Employee joins the company after Monday of the week, the HR Admin creates the Timesheet record Manually ONLY for the current week. Scheduled Trigger flow automatically creates the Timesheets for the respective employees from the second week.

Timesheets can only be manually created by the **HR Admin**. To create a new Timesheet record go to the Timesheet App and click on the **Timesheets** tab and then click the **New** button.

Timesheet is a Parent record which contains the Timesheet Line Items for the dates between **Start Date** and **End Date** of the Timesheet.

Timesheet

Timesheets

Employees

Projects

Charge Codes

Project-Charge codes

Reports

Dashboards

Timesheets

All

New

Import

Change Owner

Printable View

8 items • Sorted by Timesheet Name • Filtered by All timesheets • Updated a few seconds ago

Search this list...

	Timesheet Name ↑	Employee	Manager	Start Date	End Date	Owner ...	Status
1	☐ Timesheet for 2023-04-10 to 2023-04-16	Periyakaruppan Ganesan	Srini Chappidi	4/10/2023	4/16/2023	pkaru	New
2	☐ Timesheet for 2023-04-10 to 2023-04-16	Prameela Bodduluri	Srini Chappidi	4/10/2023	4/16/2023	pbodd	Submitted
3	☐ Timesheet for 2023-04-10 to 2023-04-16	Saichand Ballagiri	Srini Chappidi	4/10/2023	4/16/2023	sball	New
4	☐ Timesheet for 2023-04-10 to 2023-04-16	Diviya Bharathi	Srini Chappidi	4/10/2023	4/16/2023	dbhar	Submitted
5	☐ Timesheet for 2023-04-10 to 2023-04-16	Shoba Rajesh	Srini Chappidi	4/10/2023	4/16/2023	sraje	Submitted

New Timesheet

Information

* Timesheet Name

Complete this field.

Employee

Search Employees...

Manager

Search People...

Owner

Saichand Ballagiri

Start Date

End Date

Status

New

Cancel

Save & New

Save

In the detail page of the Timesheet, we display the roll up summary fields Billable Hours, Non Billable Hours, Total Billable Amount, Absence Hours and Total Hours.

Timesheet

Timesheet for 2025-06-30 to 2025-07-06

Clone

Change Owner

Printable View

Sharing

Sharing Hierarchy

Submitted

Approved

Mark Status as Complete

Details

Timesheet Line Items

Approvals

Timesheet Name

Timesheet for 2025-06-30 to 2025-07-06

Manager

Sriini Chappidi

Start Date

6/30/2025

Status

Submitted

Billable Hours

40.00

Non Billable Hours

0.00

Total Billable Amount

\$0

Created By

Anusha Priya, 6/30/2025, 12:00 AM

Employee

Manoj Ravipati

Owner

Manoj Ravipati

End Date

7/6/2025

Absence Hours

0.00

Total Hours

40.00

Met Weekly Hours

☒

Last Modified By

Manoj Ravipati, 7/10/2025, 1:08 PM

Timesheet Line Items

Timesheet Line Items will be created by the **Employee, Manager** and **HR Admin**. Go to the Timesheet page and open the Timesheet for which you want to enter the line items. Inside the Timesheet record page select the **Timesheet Line Items** tab and click **Add Project** or **Add Absence** to add Duration for Projects or Absence for any particular dates.

Timesheet

Timesheet for 2025-07-14 to 2025-07-20

Submit for Approval

Edit

Delete

Clone

Change Owner

New

Submitted

Approved

Mark Status as Complete

Details

Timesheet Line Items

Approvals

Weekly Timesheet View

Select a previous Timesheet to copy

Copy

Refresh

Save

ACTIVITY NAME	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	ACTION
Total Hours	6	0	0	0	0	0	0	
Projects Hours	6	0	0	0	0	0	0	
DBT	6.0	0.0	0.0	0.0	0.0	0.0	0.0	
Testing	Timesheet testing							
Absence Hours	0	0	0	0	0	0	0	

Add Project

Add Absence

Refresh

Save

How to fill out your Timesheet

Here's how to add your hours to the timesheet:

A. Add Projects:

- a. **Click on Add a Project (Button):** Click the **Add Project** button at the bottom left. This will create a new blank row where you will select Project, Activity, Duration and Description.
- b. **Select Project (Dropdown):** Project is required to save a record. Use the dropdown to select a **Project**. Only Projects, which are associated with the Timesheet record Employee will show.
- c. **Select Activity (Dropdown):** Activity is required to save a record. Use the dropdown to select an Activity for the Project.
- d. **Edit Activity Picklist (Optional):** If the required Activity is not available, you can edit the Activity picklist. To do this, go to **Setup > Object Manager > [Timesheet Line Item Object] > Fields & Relationships > Activity field**, and update the picklist values as needed.
- e. **Enter Duration Hours (Input):** For each row, enter the hours you worked for each day of the week in the corresponding boxes. Project duration hours cannot be smaller than 0 and greater than 24.

B. Add Absence:

- a. **Click on Add Absence (Button):** To add any absence hour (like: holiday, sick leave etc.) click on this button to add a row.
- b. **Select Absence (Dropdown):** Absence is required to save a record. Use the dropdown to select an Absence.
- c. **Enter Duration Hours (Input):** For each row, enter the hours you worked for each day of the week in the corresponding boxes. Project Absence hour cannot be greater than 8 .

C. Save Timesheet Line Items:

- a. **Save (Button):** After finishing entering your details, click the **Save** button.

D. Other Functionality:

- a. **Refresh (Button):** This button will refresh or reset the Timesheet line items details to the last saved data.
- b. **Select old Timesheet data and Copy (Picklist and Button):** To make life easier you can select an old timesheet and clicking the Copy button will copy that data into this Timesheet. Then you can make edits if required and Save.

While Inserting the Duration hours the **Billable Amount**, **Total Hours**, and **Projects Hours** rows at the top will automatically reflect values.

Once Saved, Refresh The whole page. After you have reviewed everything, click **Submit for Approval** at the top of the page.

An Employee's total duration for a single date cannot exceed the **Maximum working hours per day** mentioned in the Custom Metadata.

Submitting the Timesheet for Approval

The screenshot shows the 'Timesheet' application interface. The top navigation bar includes 'Timesheet', 'Timesheets', 'Employees', 'Projects', 'Charge Codes', 'Project-Charge codes', 'Reports', and 'Dashboards'. The 'Timesheets' tab is selected. Below the navigation bar, the 'Timesheet for 2023-04-10 to 2023-04-16' is displayed. A 'Submit for Approval' button is highlighted with an orange box. Other buttons include 'Edit', 'Delete', 'Clone', and 'Change Owner'. A progress bar shows the status: 'New' (active), 'Submitted', and 'Approved'. The 'Details' tab is selected, showing the following information:

Field	Value
Timesheet Name	Timesheet for 2023-04-10 to 2023-04-16
Manager	Srini Chappidi
Start Date	4/10/2023
Status	New
Billable Hours	0.00
Non Billable Hours	44.00
Employee	Prameela Bodduluri
Owner	Prameela Bodduluri
End Date	4/16/2023
Absence Hours	0.00
Total Hours	44.00
Met Weekly Hours	☒

When the Total Hours field on the Timesheet is greater than or equal to the Working Hours Per Day multiplied with Working Days Per Week the Employee will be able to see the **Submit for Approval** button and submit the Timesheet for Approval.

Once the Timesheet is submitted for Approval, it will get locked and will only unlock if the submittal is recalled.

Once the Timesheet is Approved by the Manager, the Timesheet will be locked and the Employee will never be able to edit it. In case of any unforeseen circumstances it can be edited by HR Admin.

The Manager can also enter the Timesheet Line Items for his Timesheets and submit it for Approval.

The Weekly Timesheet page displays all logged working hours for the selected week, allowing users to review their entries and make any necessary edits.

PTO Accrual

Simple Timesheet automatically calculates employee PTO accrual when a timesheet is approved. This helps organizations manage employee accrued hours and absence tracking without manual calculations or external HR systems.

- PTO is calculated only after a Timesheet is **approved**.
- Only **Billable Attendance** hours are considered for accrual calculations.
- PTO begins accruing only after the employee's configured **Accrual Start Date**.
- The accrued hours are calculated using the employee's configured **Accrual Divisor**.

Formula

Accrued Hours = Billable Hours/Accrual Divisor

Employee Configuration

Each Employee record contains the information required for PTO calculations:

- **Accrual Start Date** – The date from which PTO begins to accrue.
- **Accrual Divisor** – Determines how many worked hours are required to earn one hour of PTO.
- **Extra Accrued Hours** – Additional accrued hours that can be added manually by HR.
- **Extra Absence Hours** – Additional absence hours that can be recorded manually by HR.

Automatic Calculations

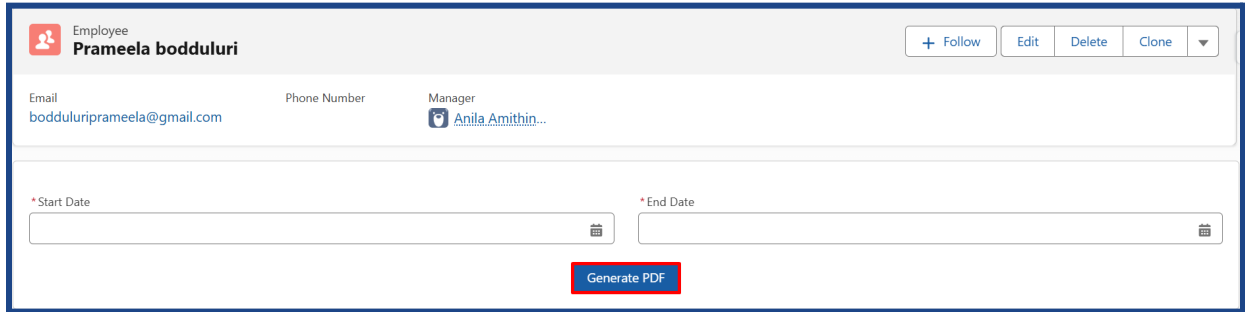
Whenever an approved timesheet is created, updated, deleted, or restored, Simple Timesheet automatically updates the employee's:

- Total Accrued Hours
- Total Absence Hours

These totals include any manual adjustments entered by HR through **Extra Accrued Hours** and **Extra Absence Hours**, ensuring employee PTO information remains accurate and up to date.

Employee Timesheet pdf

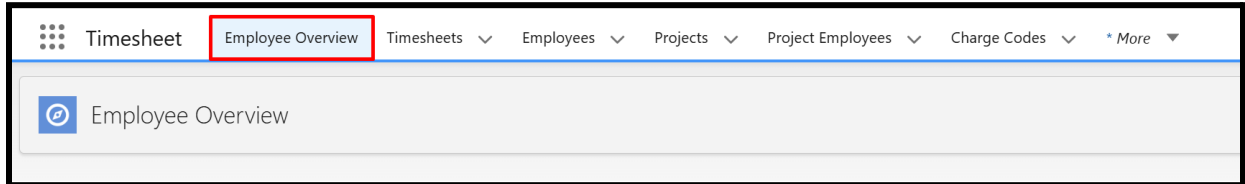
To generate a Timesheet PDF for an employee, open the employee record, select the Start Date and End Date, and click the Generate PDF button. The PDF will include the employee's timesheet details for the selected date range.



The screenshot shows an employee record for Prameela bodduluri. At the top, there's a header with the employee's name and a set of action buttons: Follow, Edit, Delete, Clone, and a dropdown arrow. Below this, the employee's details are listed: Email (bodduluriprameela@gmail.com), Phone Number, and Manager (Anila Amithin...). At the bottom, there are two date selection fields labeled '* Start Date' and '* End Date', each with a calendar icon. A red box highlights the 'Generate PDF' button located below these date fields.

Employee Overview Dashboard

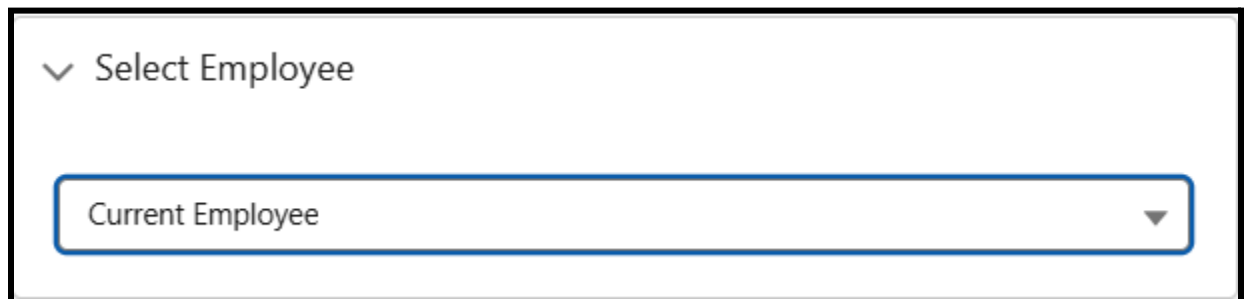
This is the Home of the Timesheet app, providing a high-level summary of an employee's data.



The screenshot shows the navigation bar of the Timesheet app. The 'Employee Overview' tab is highlighted with a red box. The navigation bar includes the following items: Timesheet, Employee Overview, Timesheets (with a dropdown arrow), Employees (with a dropdown arrow), Projects (with a dropdown arrow), Project Employees (with a dropdown arrow), Charge Codes (with a dropdown arrow), and * More (with a dropdown arrow). Below the navigation bar, the 'Employee Overview' section is visible.

Select Employee

Users with manager permission can use this. This drop down is to select different employees to show their data. Only own user employees and subordinate employees will be available to select.



The screenshot shows a dropdown menu titled 'Select Employee'. The dropdown is currently set to 'Current Employee' and has a dropdown arrow on the right side.

Employee Details

Quick details of an Employee data. The fields are Name, PhoneNumber, Email, HireDate, LastWorkingDate, ClientManager, ClientManagerEmail, Projects, TotalBillableHours, TotalNonBillableHours, TotalAbsenceHours, TotalHours, VacationsTaken.

These fields will be shown into Employee details in a 3 column view.

Employee Details					
Name:		Prameela bodduluri	Projects:		sample1
Email:		bodduluriprameela@gmail.com	Total Billable Hours:		0
			Total Non Billable Hours:		8
			Total Absence Hours:		112
			Total Hours:		120
			Vacations Taken:		14

From the edit page System Administrator can choose which fields to show and their position.

Page > dashboardProfile

Column 1 Fields ⓘ

Name,PhoneNumber,Email,HireDate,LastWorkin

Column 2 Fields ⓘ

ClientManager,ClientManagerEmail,Projects

Column 3 Fields ⓘ

TotalBillableHours,TotalNonBillableHours,TotalA

☐ Show Null Value Fields ⓘ

Set Component Visibility

Filters

+ Add Filter

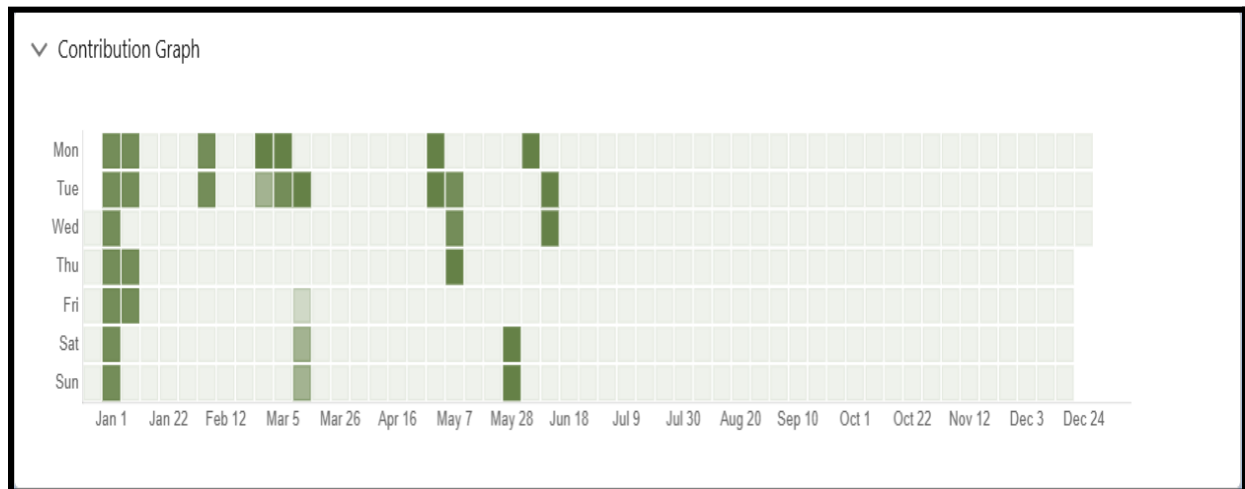
contribution graph

This is a heat map or calendar-style graph that shows an employee's activity over the current year.

X-axis (Months): A timeline showing the months of the year.

Y-axis (Days): The days of the week (Mon, Wed, Fri, Sun).

Colored Squares: Each square represents a day. The color indicates the level of activity hour. A darker green shade signifies more activity, while lighter or uncolored squares mean less or no activity.



Weekly Chart

This is a bar chart that visualizes an employee's weekly work activity with more details.

X-axis (Days): Shows the days of the week (Mon to Sun).

Y-axis (Hours): Represents the number of hours.

Target (Grey line): A horizontal line indicating the daily target of 8 hours.

Duration (Dark green bar): Shows the hours worked on a given day.

Absence (Red bar): Indicates the hours the employee was absent.

Projects (Shades of Green): Indicates different Projects hours for a day.

Users can click on the labels to hide or show them and cycle through different data representations.

Clicking on the "Previous week" or "Next Week" will change the selected week.



Overall Time

This is a donut or pie chart that visualizes the distribution of an employee's time for selected duration.

Duration (Dark green): Represents the Total hour (Attendance + absence).

Remaining (Light grey): Shows the total time that has not been accounted for and the employee does not meet the required target hour.

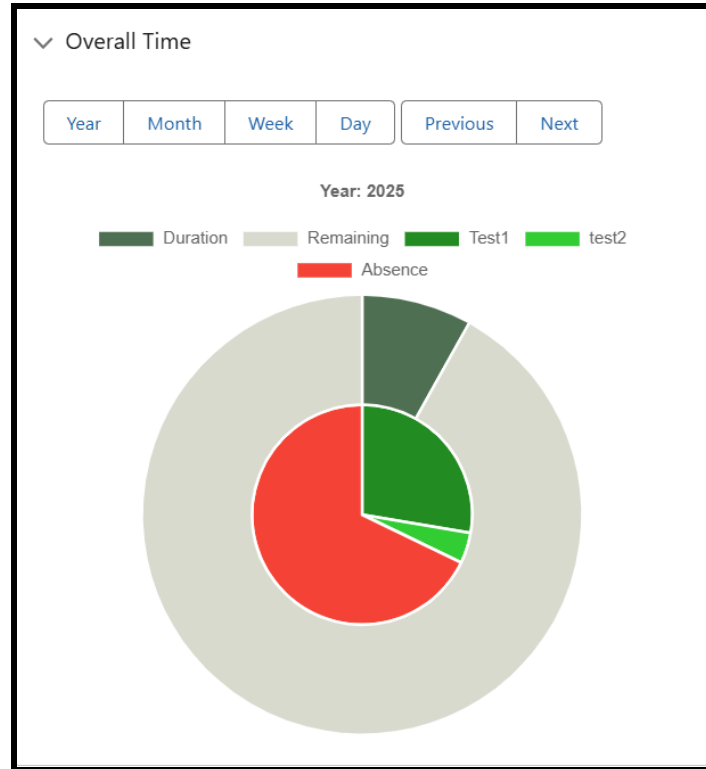
Absence (Red): Represents the employee's time spent in absence.

Projects (Shades of Green): The projects employee has worked will show.

Users can click on the labels to hide or show them and cycle through different data representations.

Clicking on the Year, Month, Week, Day will show that period's data.

Clicking on the Previous or Next will change the selected period.



Recalculation of Accrual Hours for Existing Timesheet Data

For employees, accrual hours need to be recalculated based on the **Accrual Start Date** (from which accrual calculation should begin) and the **Accrual Divisor**.

Total Accrued Hours on Employee is calculated as:
SUM (Timesheet Billable Hours / Accrual Divisor)

After updating the required fields, you can run the following script from:
Setup → Developer Console → Asynchronous Execute

Paste the below code and execute it to recalculate accrual hours for existing timesheet data.

```
TimesheetAccrualBatch batch = new TimesheetAccrualBatch();
```

```
Database.executeBatch(batch, 200);
```

Permissions

Timesheet User

The access of Timesheet users is strictly limited to the Timesheet object and Timesheet Line Item object, precluding visibility into other objects.

At the conclusion of each week, the Users shall submit their timesheets for approval, the corresponding manager responsible for evaluating and providing authorization.

Timesheet user has access to the following objects

1. **Timesheet** - Read, Tab visible
2. **Timesheet Line Item** - Create, Edit, Delete, Tab Hidden

Timesheet Manager

The Manager possesses the capability to **create, modify, and delete** his or her own **timesheet line item records**, in addition to possessing **equivalent access privileges** to those of their **subordinates**.

At the conclusion of each week, Timesheet users shall submit their records to the Manager, who shall subsequently evaluate and approve the records of their respective subordinates.

Manager has access to the following objects

1. **Timesheet** - Read, Tab visible
2. **Timesheet Line Item** - Create, Edit, Delete, Tab Hidden
3. **Employee** - Read, Tab visible
4. **Project** - Read, Tab visible
5. **Reports and Dashboard** - Tabs visible

Timesheet HR Admin

HR Admin has full access to all objects in the Timesheet app.

HR Admin has access to the following objects

1. **Timesheet** - Create, Edit, Delete, Modify All, View All, Tab visible
2. **Timesheet Line Item** - Create, Edit, Delete, Modify All, View All, Tab visible
3. **Employee** - Create, Edit, Delete, Modify All, View All, Tab visible
4. **Project** - Create, Edit, Delete, Modify All, View All, Tab visible

5. **Reports and Dashboard** - Tab visible
6. **Project Charge Code** - Create, Edit, Delete, Modify All, View All, Tab visible
7. **Charge Code** - Create, Edit, Delete, Modify All, View All, Tab visible
8. **Project Employee** - Create, Edit, Delete, Modify All, View All, Tab visible

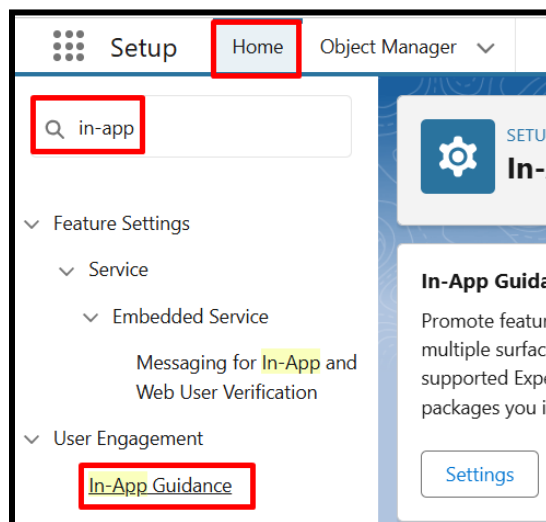
Flows

Flow Name	Type of Flow	Description	Time	Status
Absence management Flow STF	Schedule Trigger Flow	If any Employee exceeds their allotted absence, this will send In app Notification and Email Notification to the User and Manager.	12 AM (Daily)	Active
Timesheets Creation STF	Schedule Trigger Flow	Automatically creates Timesheets for Active Employees.	12 AM (Weekly)	Active
In-app Guidance using STF	Schedule Trigger Flow	If employees do not submit their Timesheet. This will remind employees using Salesforce In-App Guidance.	5 PM (Every Friday)	Active
Timesheet Remainder STF	Schedule Trigger Flow	Send a Timesheet Reminder to employees to submit their Timesheet for the current week.	8 PM (Every Friday)	Active
Timesheet Submission Follow-up Email STF	Schedule Trigger Flow	Send a Timesheet Submission Follow-up Email (STF) to employees who have not submitted their timesheet by the end of Sunday.	8 PM (Every Friday)	Active
Employee Name RTF	Record Trigger Flow	If user enters First Name and Last Name Apex trigger will concatenate name fields and update in the employee name field Also It will update Manager name from the user record in Employee		

		Object If Manager assigned in Employee object, User record will Update		
Deactivating Inactive Employee User RTF	Record Trigger Flow	When an employee is marked as inactive, this flow will automatically deactivate the associated user. However, if the user is part of any email alerts, approval processes, or similar configurations, manual deactivation may be required.		Deactivate

In-App Guidance Steps :

1. Navigate to In-App Guidance: Go to **Setup** → **In-App Guidance**.



2. Locate the Timesheet Submission Prompt: Find **Timesheet Submission** and click **Edit**.

SETUP

In-App Guidance

Add

In-App Guidance

Promote feature discovery, onboard users to new processes or experiences, and provide guided training across multiple surfaces, all in the flow of work. Add prompts and walkthroughs in Lightning Experience pages and apps or in supported Experience Cloud site pages. Specify when your in-app guidance is available and who can see it. Some packages you install can also include in-app guidance. [Tell Me More](#)

Settings

Start Testing

1 Item

Q Search this list...

	Name	Type	App	Page	Created By	Views	Completes	Package	Active	
1	Timesheet Submis...	Floating Prompt	Timesheet	Any	Anushapriya Suba...	1	0%			Clone Preview

3. Open Scheduling Options: Click the **Gear icon** → **Schedule** → **In Date Range**.

In-App Guidance Builder

Edit your in-app guidance

In-App Guidance on This Page

Timesheet Submission

Search...

Timesheet

Employee Overview

Timesheets

Employees

Projects

4. Update the Start Date: Change the **Start Date** to today's date and save.

In-App Guidance Settings

✓ Action
○ **Schedule**
● Profiles
● Permissions
● Details

Schedule

Choose a date range for the in-app guidance to appear. Then, decide if it should appear once or repeat.

Date Range
Specify when the in-app guidance should start and optionally stop. The default start is today's date.

* Start Date: Mar 23, 2025
End Date:

Frequency
Specify how often you want to show the in-app guidance. We determine whether to show it again or cancel scheduled recurrences by detecting how users interact. If you want to show the in-app guidance more than once, also specify the number of days in between scheduled recurrences.
[Tell Me More](#)

☒ Show when the page loads ⓘ

*Times to Show: 10
*Days In Between: 7

[Back](#) [Next](#)

Switching from Classic to Lightning in Mobile

If you don't see the Lightning option directly in the Salesforce mobile app, follow these steps using Chrome:

1. Open **Chrome** on your phone.
2. Log into Salesforce (you'll likely see Classic or Salesforce1 view).
3. Tap the **three dots** ⋮ (menu) in Chrome.
4. Select "**Request Desktop Site.**"

Refresh the page — now the user menu should show the "**Switch to Lightning Experience**" link.