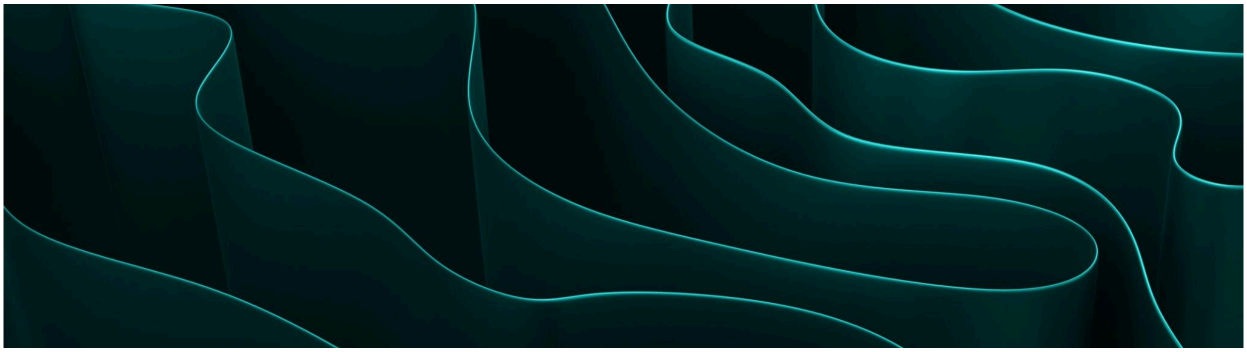


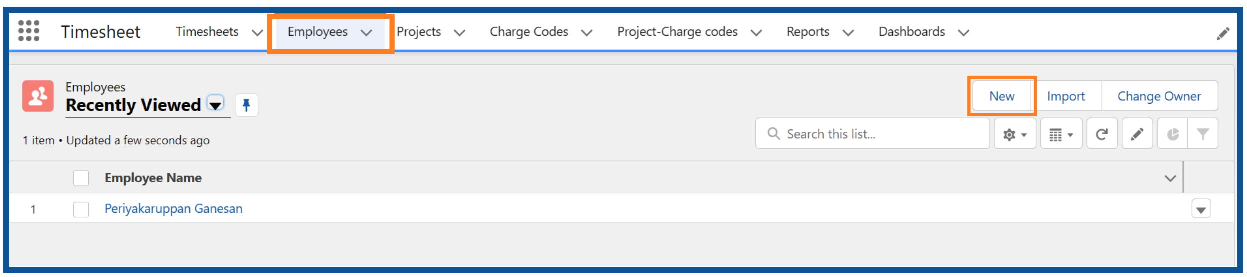
Simple Timesheet User Documentation

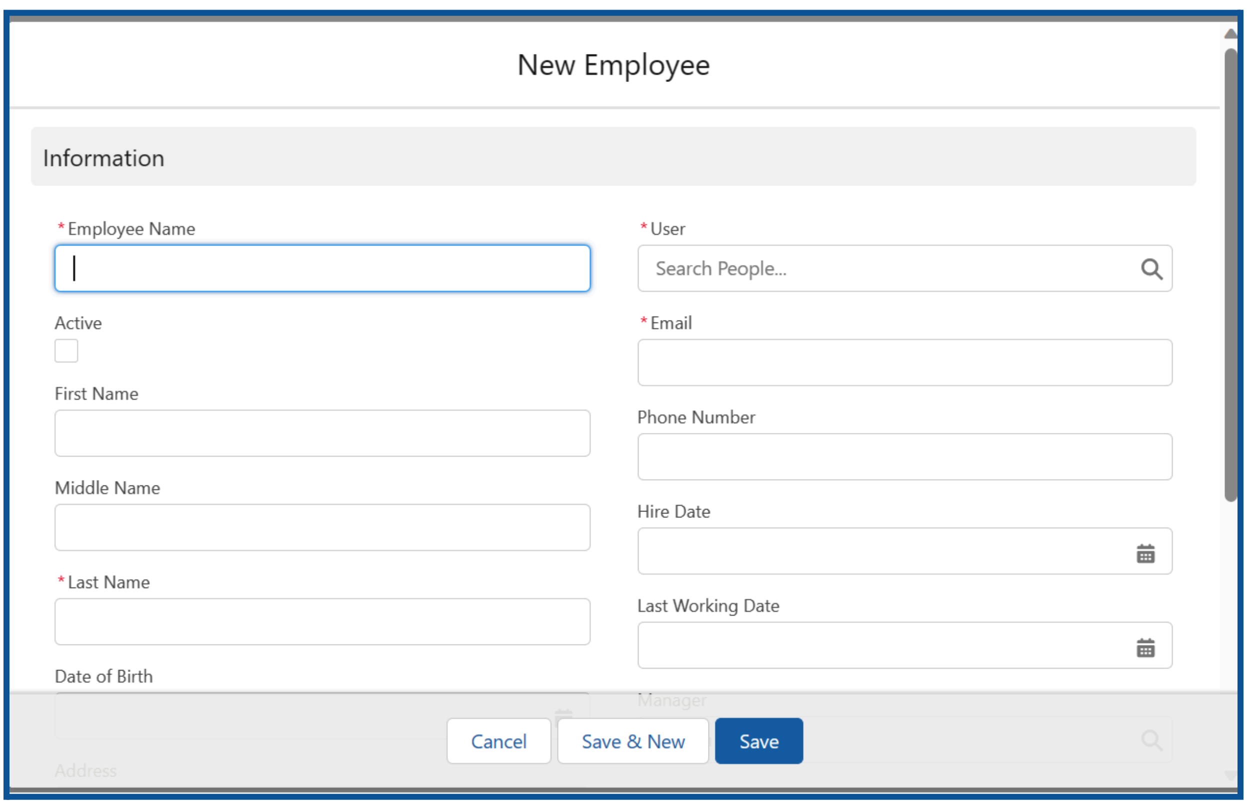
Employees

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.

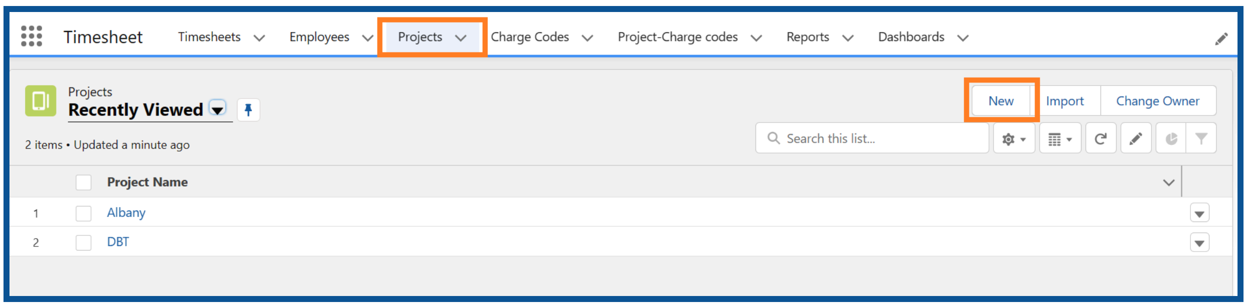


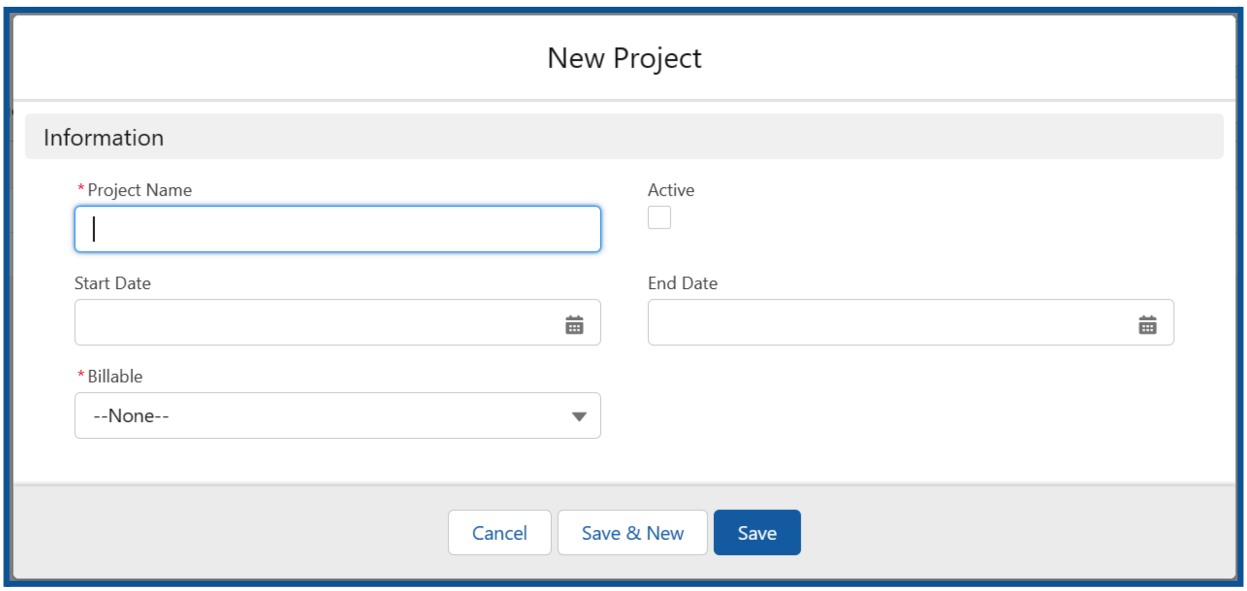


The Employee Name entered by the user will be overwritten like this “<First Name>, <Last Name>”.

Projects

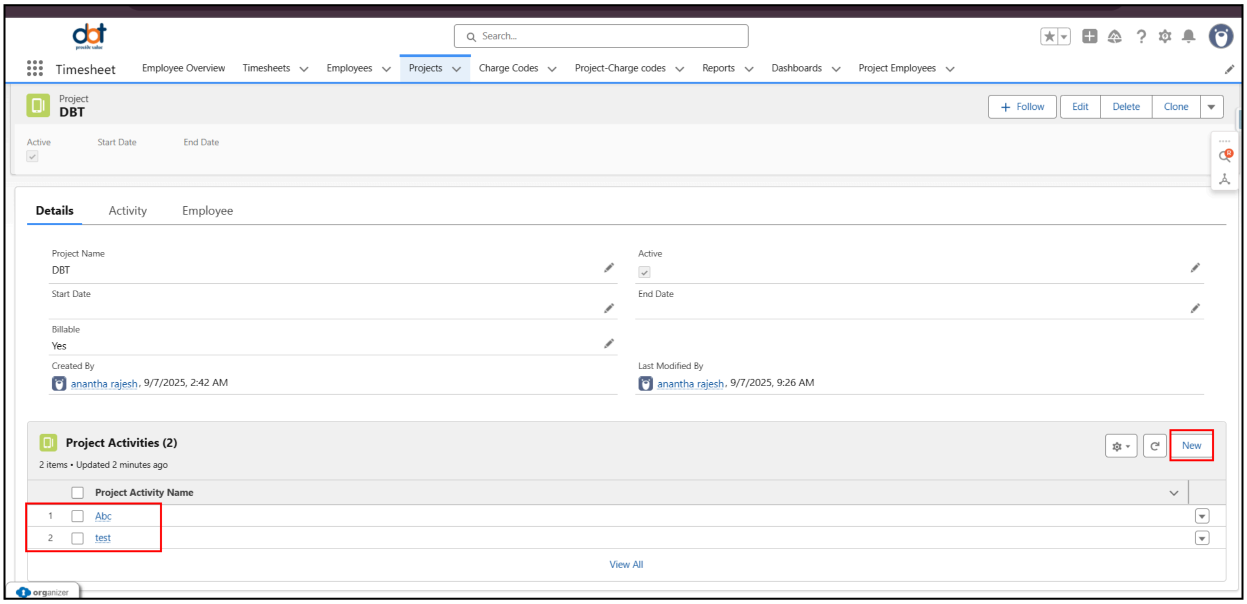
Projects can only be created by the HR Admin.Go to the Timesheet App and click on **Projects** tab and then click the **New** button.





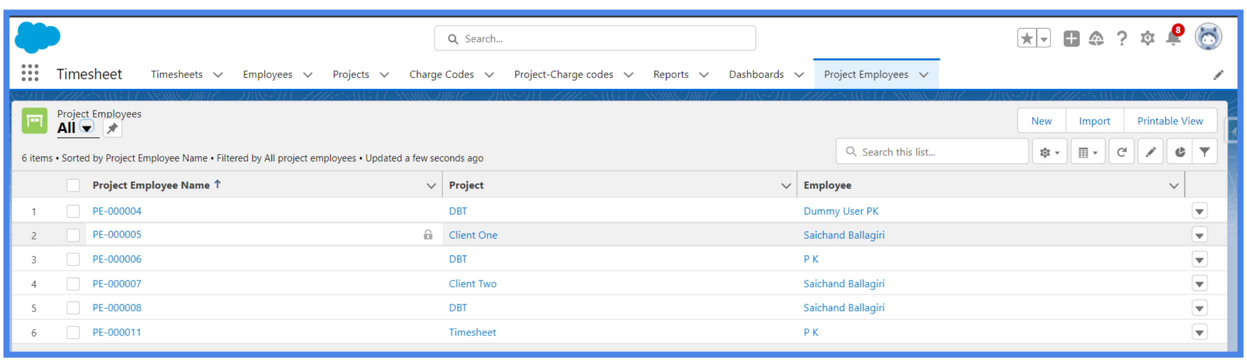
Every Project has to be either Billable or Non Billable.

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.

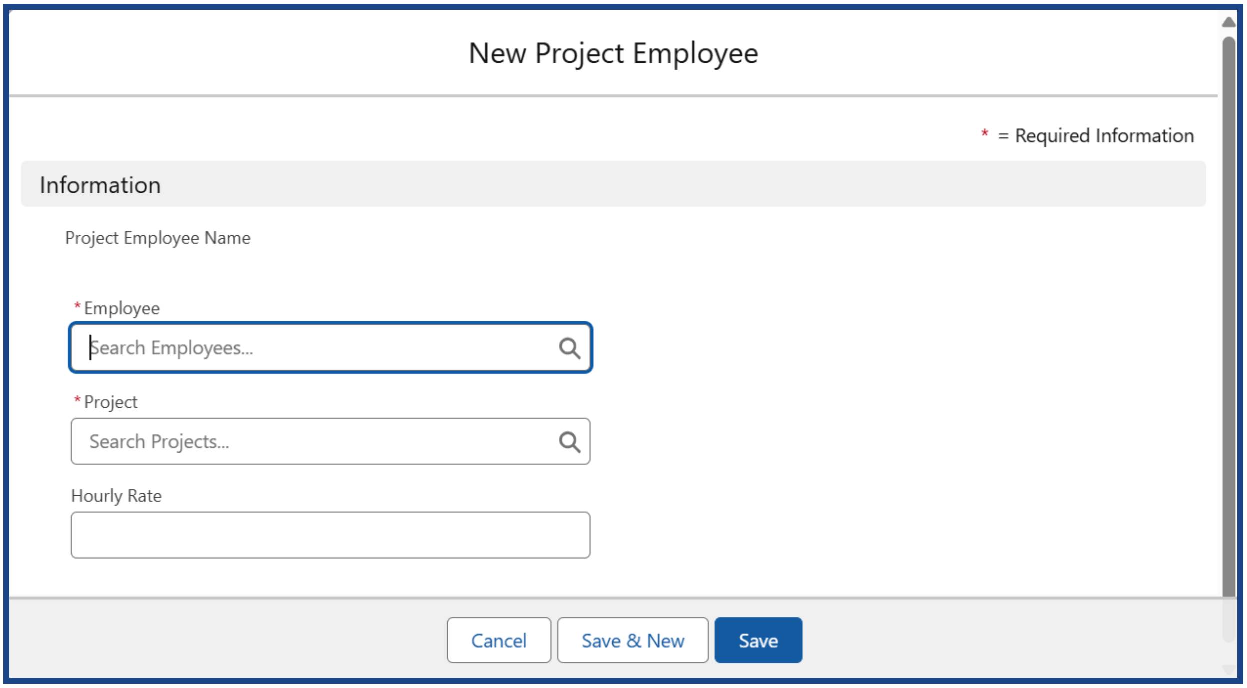


Project - Employees

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.

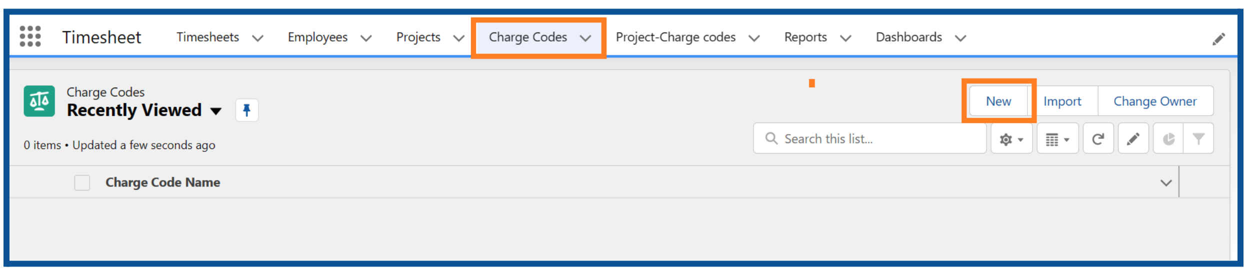


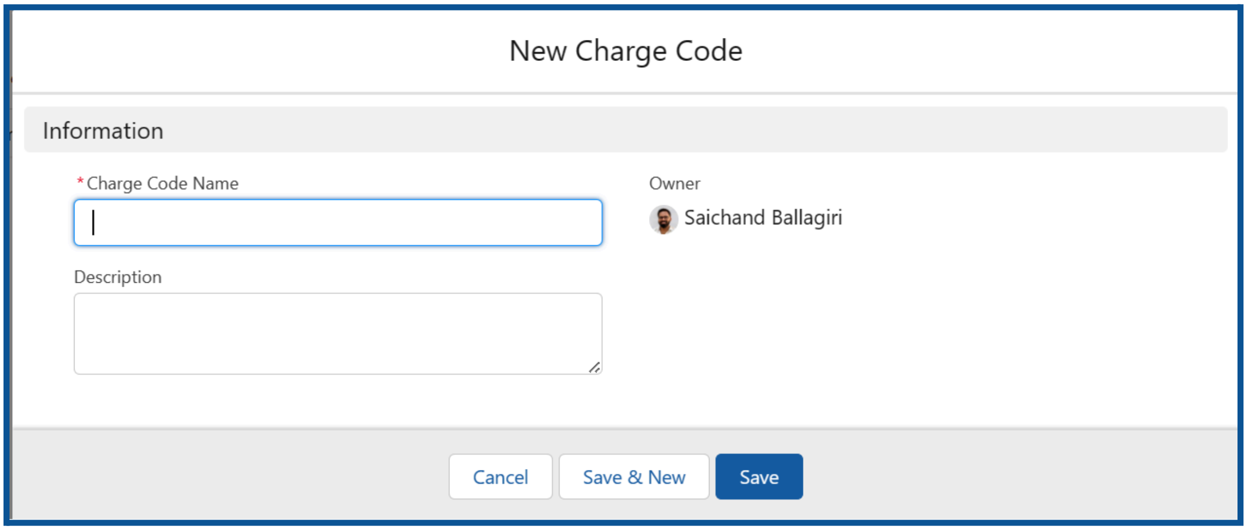
HR Admin can use the below form to link employees to projects so that time tracking and billing can be recorded accurately. The Employee must already exist in the **Employees** tab before being assigned to a project.
Only active projects will show in the Project lookup field.
If the Project is selected as Billable, the Hourly rate field will be used to calculate the Billing amount in the Timesheet.



Charge Codes

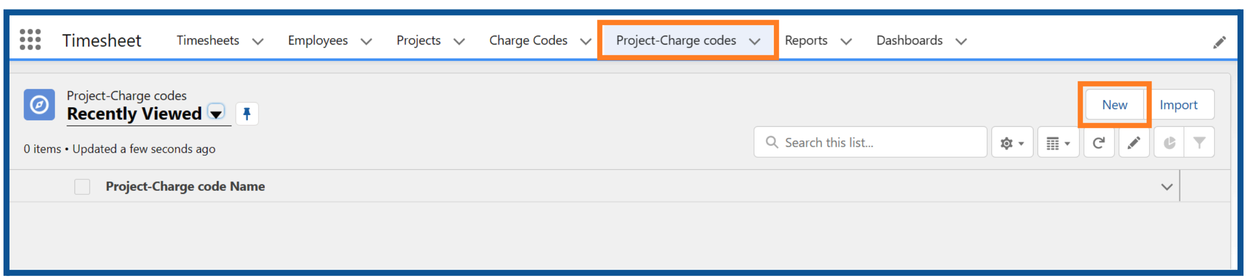
Charge Codes can only be created by the HR Admin.Go to the Timesheet App and click on **Charge Codes** tab and then click the **New** button

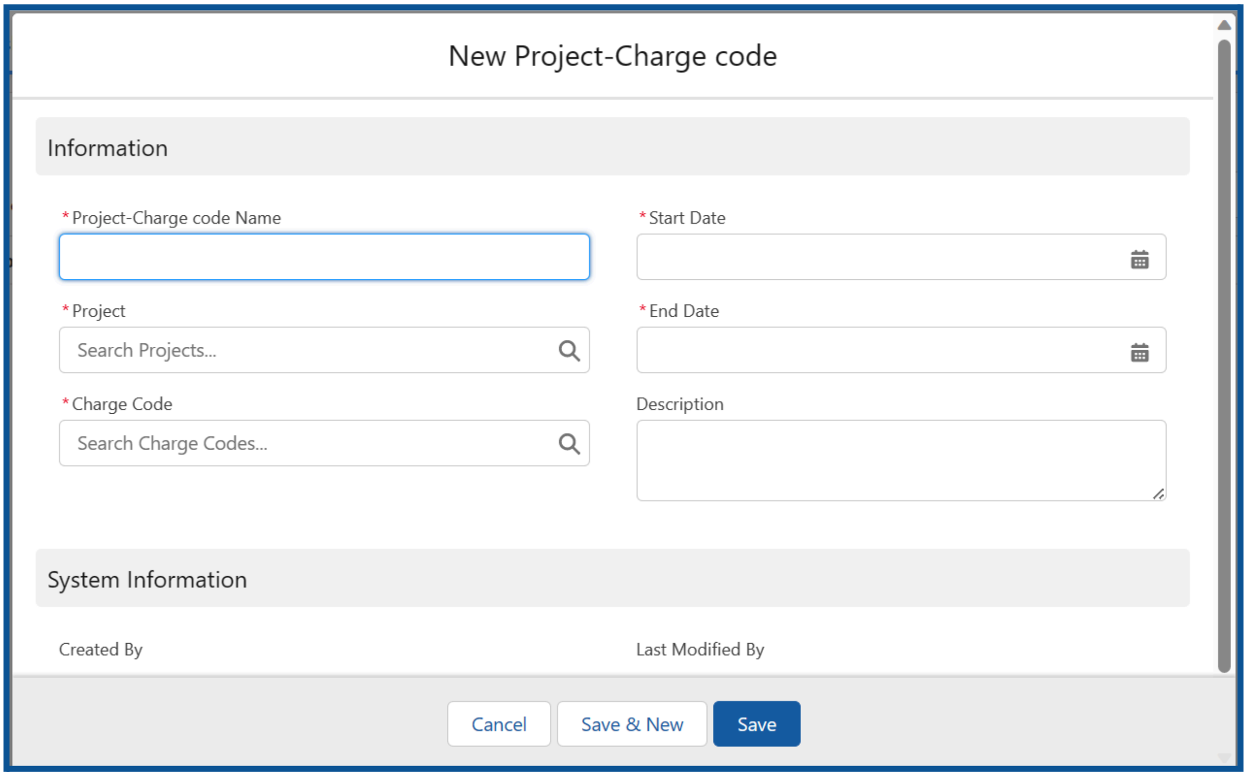




Project - Charge Codes

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.

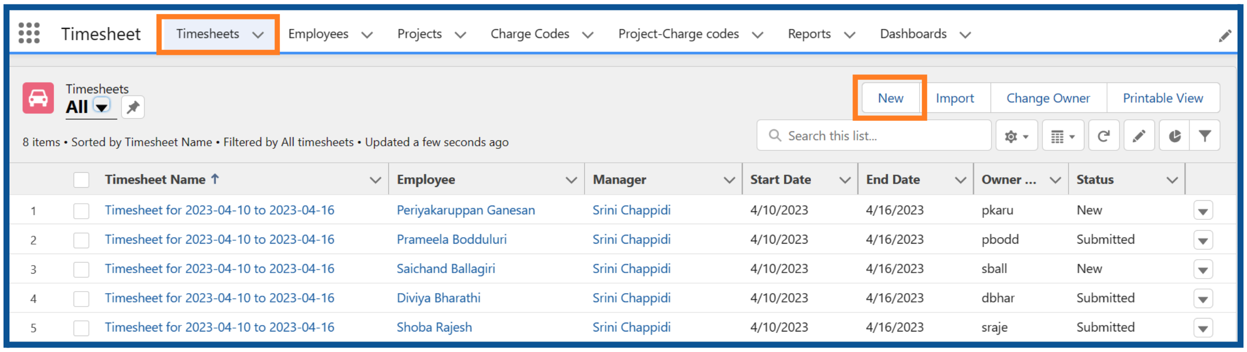


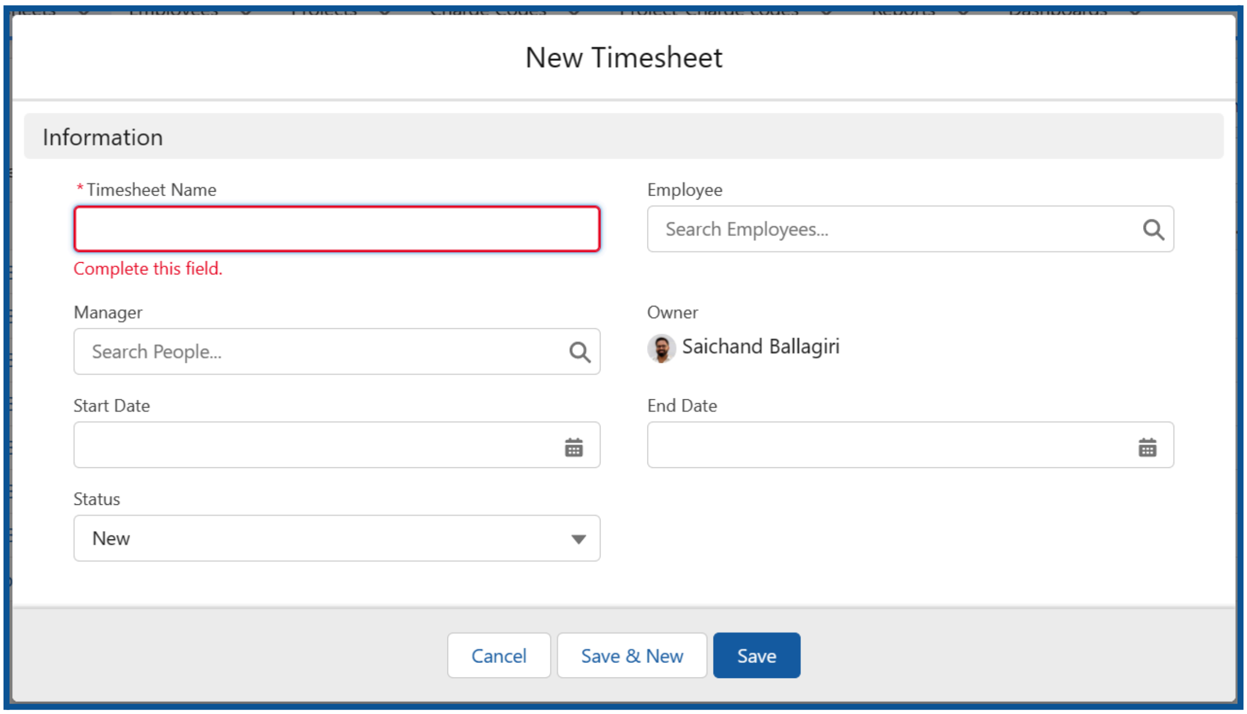


Timesheets

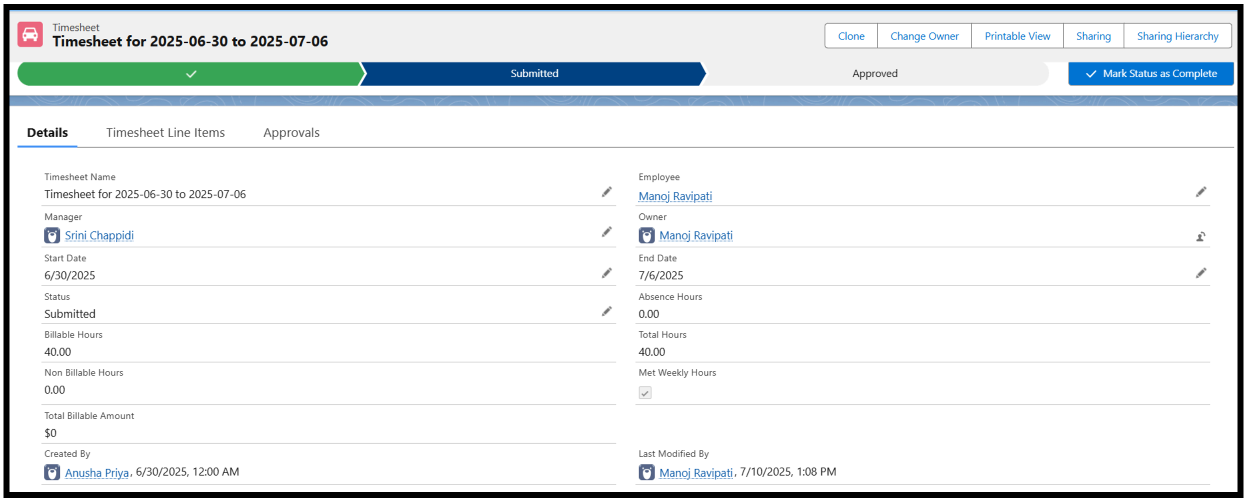
Timesheets are automatically created for all the active Employees on Monday at 12:00 AM with the name format as **Timesheet for 2025-06-30 to 2025-07-06** (Monday to Sunday).
If a new Employee joins the company after Monday of the week, the HR Admin creates the Timesheet record Manually ONLY for the 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.





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 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.

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:

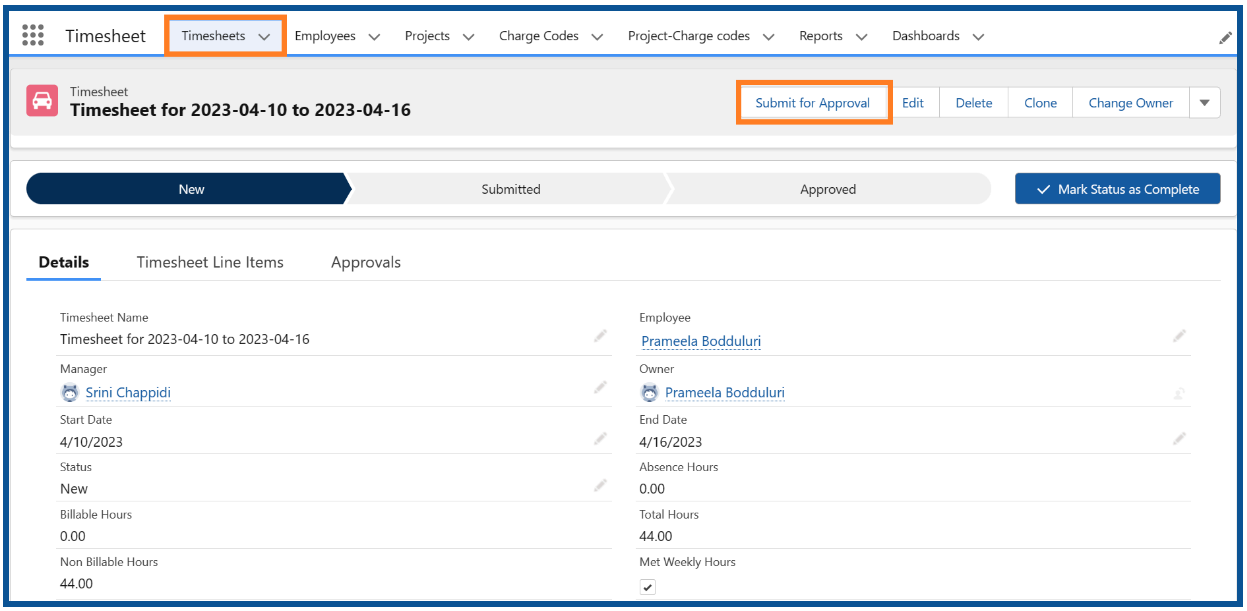
a. Refresh (Button): This button will refresh or reset the Timesheet line items details to the last saved data.
b. Select old Timesheet data and Copy (Picklist and Button): To make life easier you can select an old timesheet and clicking the Copy button will copy that data into this Timesheet. Then you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



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:

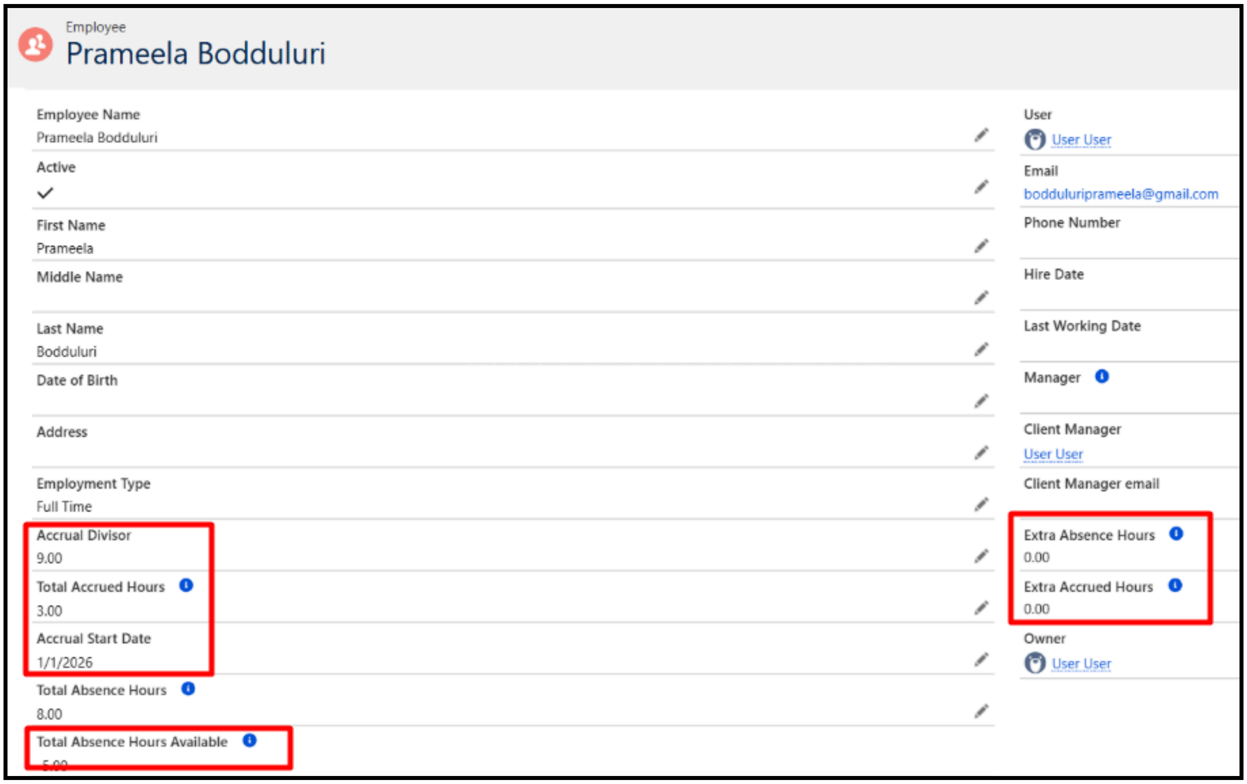
- **Accrual Start Date** – The date from which PTO begins to accrue.
- **Accrual Divisor** – Determines how many worked hours are required to earn one hour of PTO.
- **Extra Accrued Hours** – Additional accrued hours that can be added manually by HR.
- **Extra Absence Hours** – Additional absence hours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

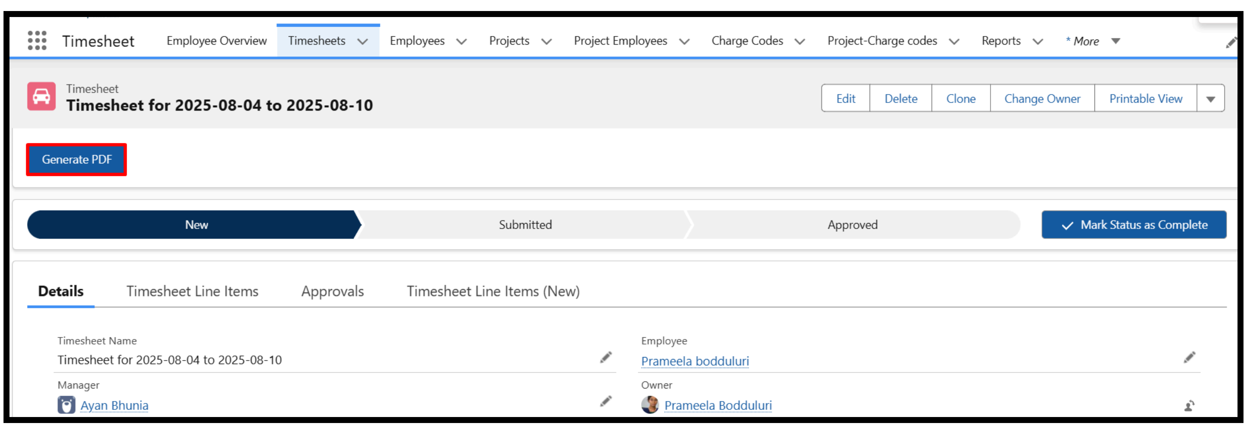
These totals include any manual adjustments entered by HR through **Extra Accrued Hours** and **Extra Absence Hours**, ensuring employee PTO information remains accurate and up to date.



Generating Timesheet Pdf

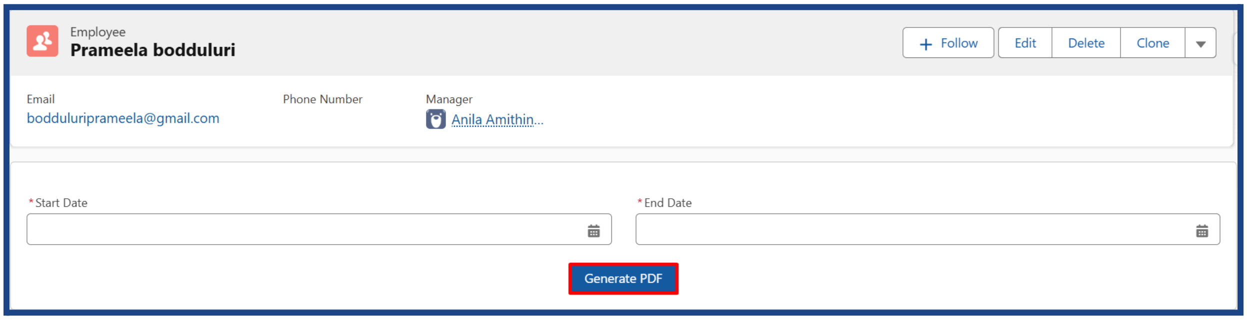
Timesheet Pdf

By clicking the Generate PDF button on Timesheet record page, the system generates a PDF version of that week's timesheet, which can then be saved or shared for approval and record-keeping.



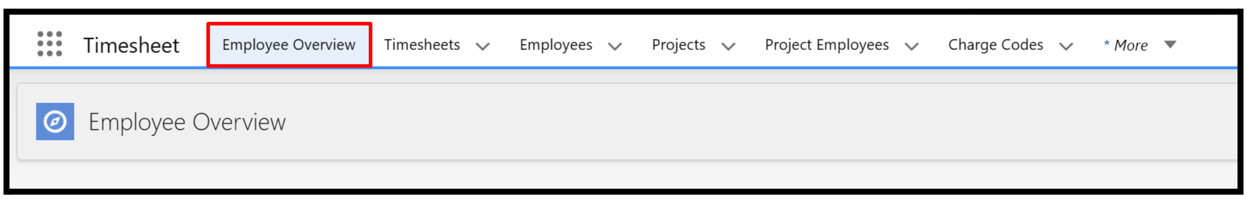
Employee Timesheet pdf

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.



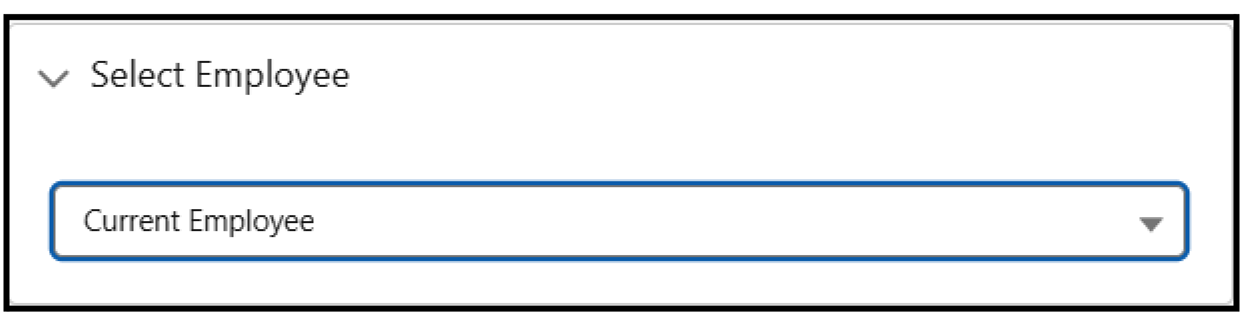
Employee Overview Dashboard

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



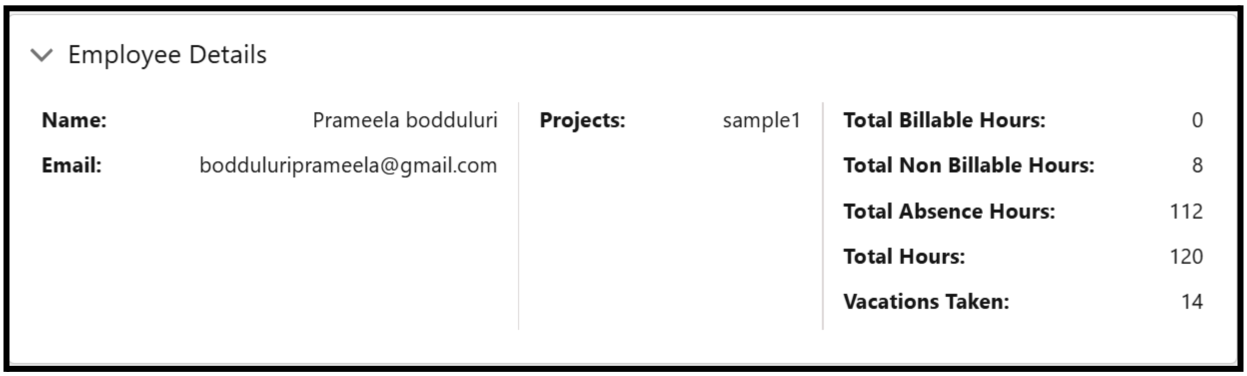
Select Employee

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.

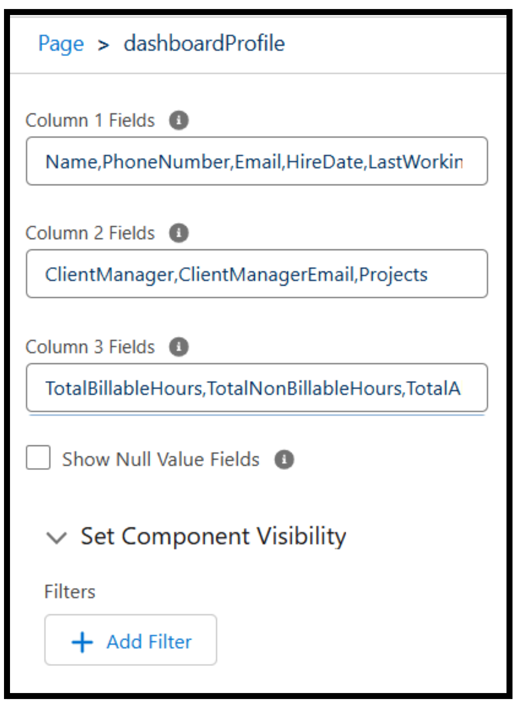


Employee Details

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.



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



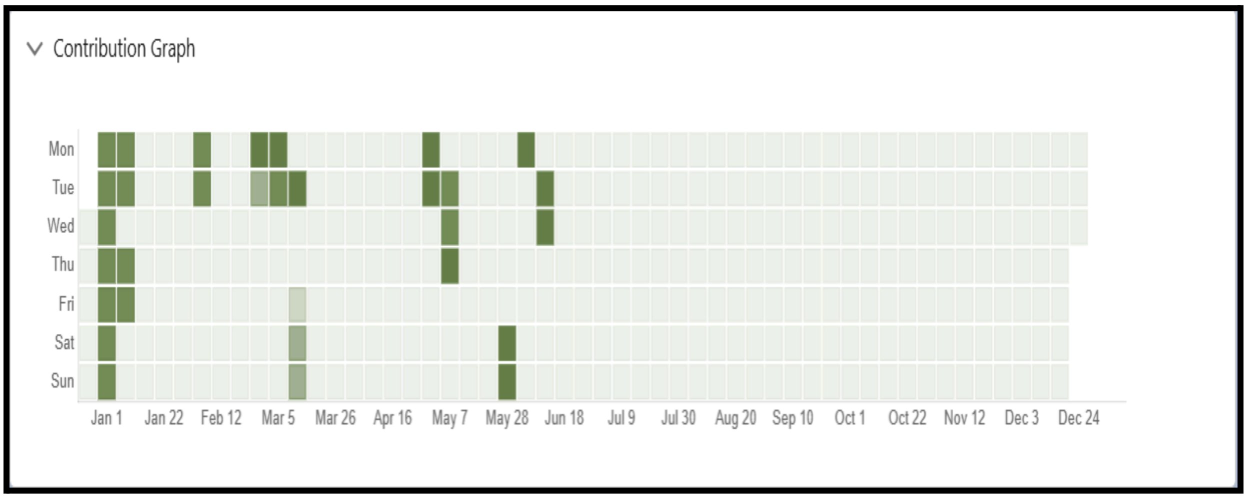
contribution graph

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.

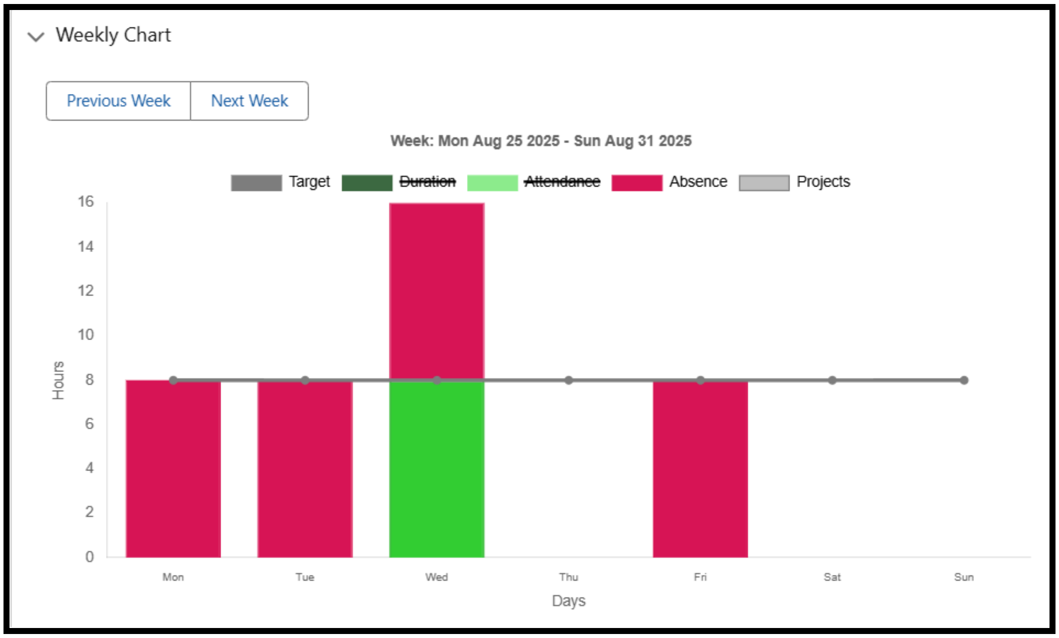
Duration (Dark green bar): Shows the hours worked on a given day.

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.

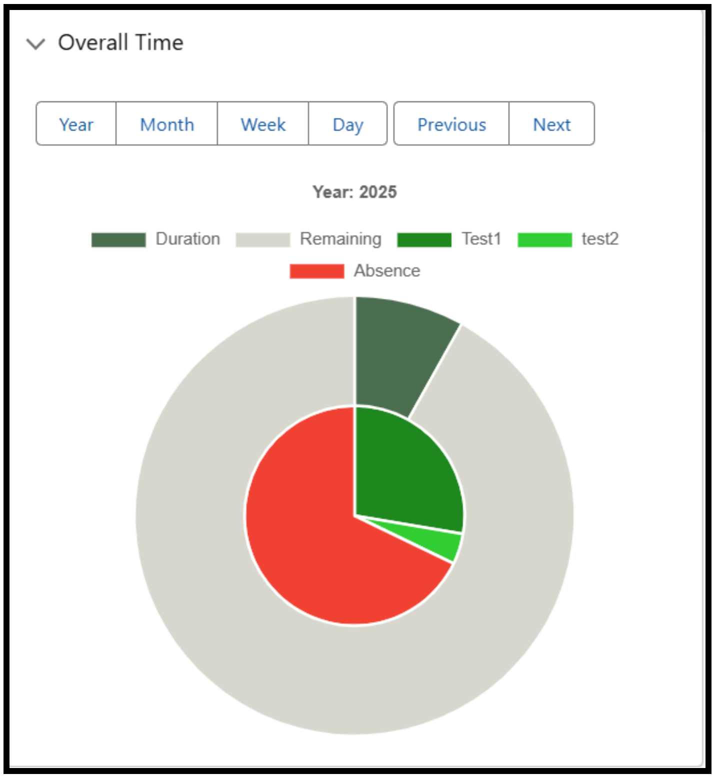


Overall Time

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

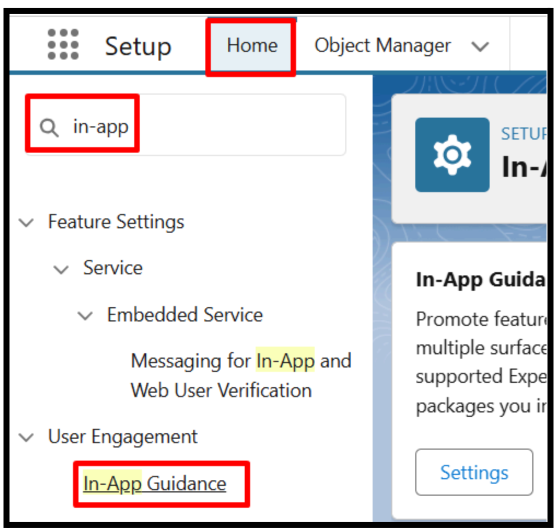
Flows

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		

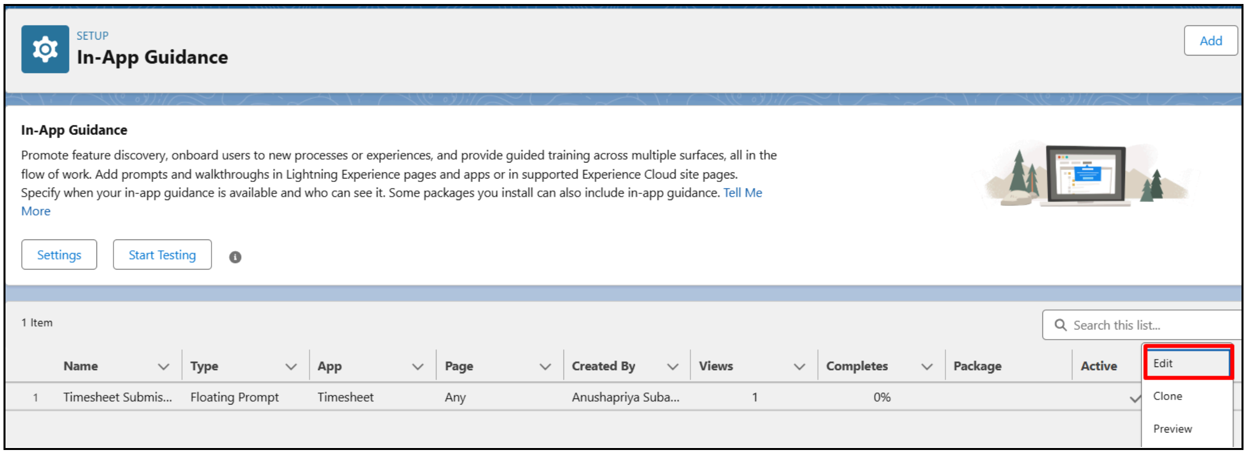
		Object If Manager assigned in Employee object, User record will Update		
Deactivating Inactive Employee User RTF	Record Trigger Flow	When an employee is marked as inactive, this flow will automatically deactivate the associated user. However, if the user is part of any email alerts, approval processes,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

In-App Guidance Steps :

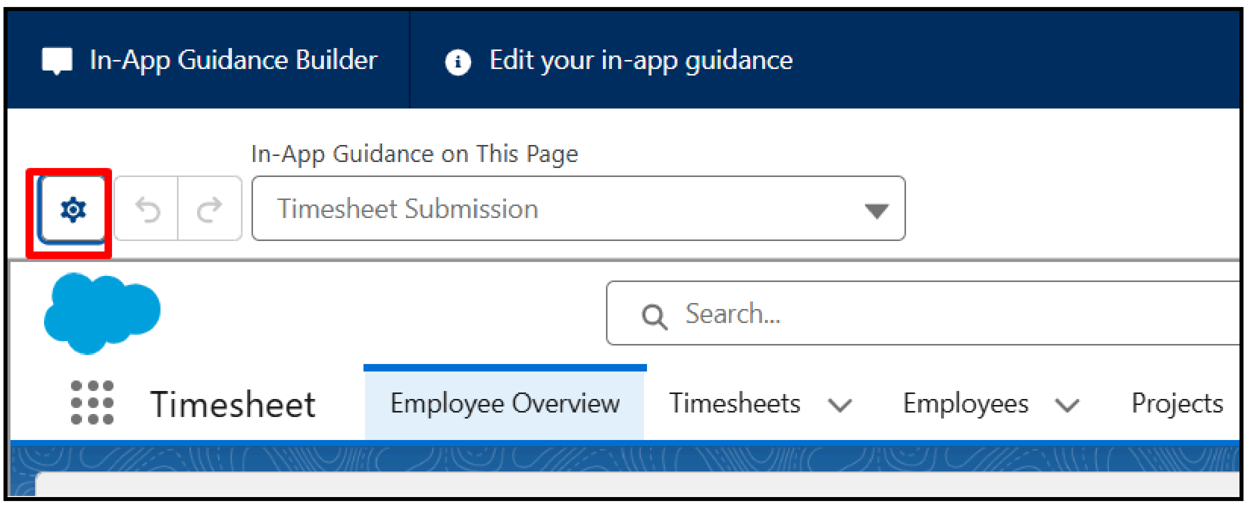
1. Navigate to In-App Guidance: Go to **Setup** → **In-App Guidance**.



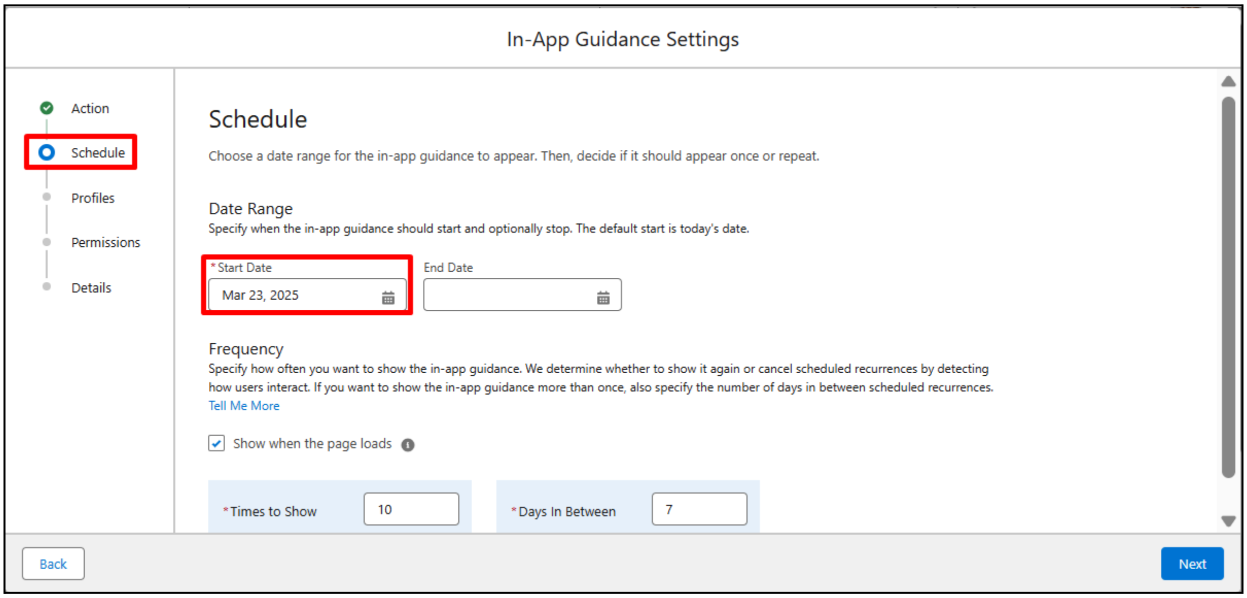
2. Locate the Timesheet Submission Prompt: Find **Timesheet Submission** and click **Edit**.



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



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



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.