

SIMPLE TIMESHEET

Complete FAQ & Product Guide

Product: Simple Timesheet | Platform: Salesforce AppExchange | Publisher: Digital Biz Tech

General

What is Simple Timesheet?

Answer

Simple Timesheet is a native Salesforce time tracking application that helps organizations record employee work hours, manage projects, track PTO and absences, automate approvals, generate reports, and improve workforce productivity — all without leaving Salesforce.

It is designed for organizations that want to eliminate spreadsheets and disconnected time tracking tools while keeping all employee and project data inside Salesforce.

Why should I use a native Salesforce timesheet app?

Answer

- No third-party database — all data stays inside Salesforce
- Uses Salesforce security and permission sets
- Works with existing Salesforce reports and dashboards
- Supports Salesforce Flow automation
- Easily customizable with standard Salesforce tools
- Centralized employee and project management

What business problems does Simple Timesheet solve?

Answer

Simple Timesheet helps organizations:

- Replace Excel and manual timesheets
- Track employee working hours accurately
- Monitor billable and non-billable project work
- Track project costs and resource utilization
- Manage PTO accrual and employee leave
- Automate weekly timesheet creation
- Simplify manager approval workflows
- Generate payroll-ready reports and PDFs

- Improve project visibility and billing accuracy

Who can use Simple Timesheet?

Answer

Simple Timesheet is suitable for:

- Consulting companies
- IT and software development companies
- Professional services firms
- Nonprofit organizations
- Government organizations
- Engineering and manufacturing companies
- Marketing agencies
- Healthcare organizations

Is Simple Timesheet built completely inside Salesforce?

Answer

Yes. Simple Timesheet is a 100% native Salesforce application. All data remains inside Salesforce and follows Salesforce security, permissions, reporting, and automation capabilities. There is no third-party database and no external login required.

What makes Simple Timesheet different from other Salesforce timesheet apps?

Answer

Simple Timesheet is a 100% native Salesforce application that combines employee time tracking, project management, PTO accrual, leave management, approvals, dashboards, reporting, and automation in one free solution.

Unlike standalone time tracking tools, all data stays inside Salesforce, allowing organizations to use Salesforce security, reports, dashboards, Flow automation, and integrations without maintaining another platform.

Which Salesforce editions are supported?

Answer

- Professional
- Enterprise
- Unlimited
- Performance
- Developer

Why choose Simple Timesheet?

Answer

Simple Timesheet combines employee time tracking, PTO management, project tracking, approvals, dashboards, automation, and reporting into one native Salesforce application — helping organizations improve productivity, simplify payroll preparation, and gain better visibility into employee and project performance.

It is free, fully native, and ready to use from day one with no per-user fees, no trial limits, and no external platforms to maintain.

Time Tracking & Timesheets

Does Simple Timesheet automatically create weekly timesheets?

Answer

Yes. The application automatically creates weekly timesheets for all active employees every Monday through Salesforce Scheduled Flows. This eliminates manual timesheet creation entirely.

If a new employee joins mid-week, the HR Admin creates their timesheet manually for the current week only. From the second week onwards, the scheduled flow handles creation automatically.

Can employees enter daily work hours?

Answer

Yes. Employees can enter working hours for every day of the week directly inside Salesforce. Each timesheet supports multiple projects, multiple activities, descriptions, and daily hours entry through a weekly grid view.

Can employees track multiple projects?

Answer

Yes. Employees can log time against multiple projects in the same week. Each project can contain different activities and billing information.

Does the app support activities or task categories?

Answer

Yes. Every timesheet entry includes an Activity field. Organizations can customize activity picklist values to match their business processes.

Common examples: Development, Testing, Documentation, Meetings, Training, Support.

Does Simple Timesheet support employee attendance tracking?

Answer

Yes. Organizations can use Simple Timesheet to record employee working hours, attendance, billable hours, non-billable hours, and absences — providing managers with complete visibility into employee productivity.

Does the app prevent employees from entering excessive hours?

Answer

Yes. Simple Timesheet validates maximum working hours per day, maximum absence hours per day, and total daily hours. Validation rules help maintain accurate and compliant timesheet records.

Can employees copy a previous week's timesheet?

Answer

Yes. Users can select any prior timesheet and copy its project line items into the current week with one click — reducing repetitive data entry for teams with recurring project assignments.

Is Simple Timesheet mobile friendly?

Answer

Yes. Since it is a native Salesforce application, employees can access and submit timesheets through the Salesforce Mobile app on iOS and Android without any additional setup or separate login.

Projects & Billing

Does the app support billable and non-billable projects?

Answer

Yes. Projects can be marked as Billable or Non-Billable. Billable projects automatically calculate billing amounts using the configured hourly rate per employee.

Summary fields on each timesheet show Billable Hours, Non-Billable Hours, Total Billable Amount, Absence Hours, and Total Hours.

Can organizations assign projects to employees?

Answer

Yes. HR Administrators and Project Managers can assign projects to specific employees. Employees only see projects assigned to them when filling in their weekly timesheets.

Does the app support charge codes?

Answer

Yes. Organizations can create Charge Codes and associate them with projects. This is particularly useful for government contractors, consulting firms, and cost-centre-based billing that requires granular time allocation.

Can Simple Timesheet be used for project time tracking?

Answer

Yes. Employees can log hours against multiple projects, activities, clients, and charge codes. Managers can monitor project effort, billable utilization, and overall project costs through Salesforce reports and dashboards.

Can Simple Timesheet help with payroll preparation?

Answer

Yes. Approved timesheets provide accurate employee working hours that can be exported as PDFs or integrated with payroll systems. Organizations can automate payroll preparation using Salesforce Flow, Apex, or external integrations.

PTO Accrual & Leave Management

Does Simple Timesheet support PTO and leave tracking?

Answer

Yes. Employees can record Vacation, Sick Leave, Public Holidays, Personal Leave, and other absence types within the same weekly timesheet. Leave hours are tracked separately from project hours.

Does Simple Timesheet support PTO accrual?

Answer

Yes. The application includes automated PTO Accrual functionality. Organizations can configure the Accrual Start Date and Accrual Divisor per employee.

For each approved timesheet, the system calculates:

$$\text{Accrued Hours} = \text{Billable Hours} \div \text{Accrual Divisor}$$

The calculation begins only after the employee's configured Accrual Start Date. Calculated hours are automatically added to the employee's Total Accrued Hours balance.

How are employee leave balances calculated?

Answer

Simple Timesheet automatically maintains employee leave balances using three values:

$$\text{Total Accrued Hours} = \text{Accrued PTO} + \text{Extra Accrued Hours}$$

$$\text{Total Absence Hours} = \text{Leave Taken} + \text{Extra Absence Hours}$$

$$\text{Available Leave Balance} = \text{Total Accrued Hours} - \text{Total Absence Hours}$$

Employees and managers always have real-time visibility into available PTO from the employee record.

Can HR manually adjust PTO balances?

Answer

Yes. HR Administrators can update Extra Accrued Hours and Extra Absence Hours directly on the employee record. These adjustments are automatically included in the employee's balance after the next approved timesheet.

Can employees see their available leave balances?

Answer

Yes. Employee records display Total Accrued Hours, Total Absence Hours, and Available Absence Hours so employees and managers can understand remaining leave entitlement at any time.

Does Simple Timesheet automate leave management?

Answer

Yes. Simple Timesheet automates:

- PTO Accrual calculation after each approved timesheet
- Leave balance tracking and real-time updates
- Vacation, sick leave, and absence hour recording
- Automated alerts when absence hours exceed configured limits
- Approval workflow for submitted timesheets containing leave

Approvals & Reminders

Does the application support manager approvals?

Answer

Yes. Employees submit completed timesheets for manager approval. Managers can Review, Approve, or Reject timesheets. Once approved, the timesheet becomes read-only and cannot be edited by the employee.

In exceptional circumstances, HR Admins retain full access and can edit any approved timesheet.

What automated reminders does Simple Timesheet send?

Answer

Simple Timesheet sends three automated reminders through built-in Salesforce Flows:

- Every Friday at 5 PM — Salesforce In-App Guidance notification
- Every Friday at 8 PM — Email reminder to employees who have not submitted
- Every Sunday evening — Follow-up email for employees still outstanding

Additionally, an automated alert is sent to the employee and their manager if absence hours exceed the configured daily limit.

Can HR administrators manage all employees?

Answer

Yes. HR Administrators have complete access to Employees, Projects, Charge Codes, Timesheets, Reports, Dashboards, PTO, and Project Assignments. They can create, edit, and override any record in the application.

Dashboards, Reports & PDF Export

Can managers monitor employee performance?

Answer

Yes. The Employee Overview Dashboard provides:

- Employee Details Panel — Name, email, hire date, projects, total hours summary
- Contribution Heat Map — GitHub-style calendar showing daily activity across the year
- Weekly Bar Chart — Duration, Attendance, Absence, and Project hours per day
- Overall Time Donut Chart — Billable, Non-Billable, Absence, and Remaining hour distribution

Does the application include dashboards?

Answer

Yes. The application provides interactive dashboards showing Total Hours, Billable Hours, Non-Billable Hours, Leave Hours, Project Distribution, Weekly Activity, and Employee Productivity.

What reports and analytics are available?

Answer

Organizations can analyze using native Salesforce Reports and Dashboards:

- Employee productivity and utilization
- Project hours and billable amounts
- Non-billable hours and leave summaries
- Weekly and monthly activity trends
- Team productivity and resource utilization
- Timesheet compliance and submission rates
- Project profitability and cost tracking

Does Simple Timesheet generate PDFs?

Answer

Yes. The application generates professional PDF reports for:

- Weekly Timesheets — generated directly from any individual timesheet record
- Employee Timesheets — generated from the employee record across any custom date range

PDFs are used for payroll submission, client invoicing, audits, compliance, and record keeping.

Integrations, Automation & Customization

Can the app automate timesheet management?

Answer

Yes. Simple Timesheet includes several built-in Salesforce Flows:

- Automatic Timesheet Creation — runs every Monday at midnight for all active employees
- Absence Management Alert — daily check; notifies employee and manager if absence limit exceeded

- In-App Guidance Reminder — every Friday at 5 PM for unsubmitted timesheets
- Timesheet Reminder Email — every Friday at 8 PM
- Follow-up Submission Email — every Sunday evening for outstanding timesheets
- Employee Name Auto-Update — record trigger that auto-formats name from first + last name
- User Deactivation Flow — automatically deactivates the Salesforce user when employee is marked inactive

Can Simple Timesheet integrate with QuickBooks?

Answer

Yes. Although QuickBooks integration is not included in the standard AppExchange package, it can be implemented as a customer-specific customization using Salesforce APIs, Apex, Flow, or middleware.

Digital Biz Tech has implemented a Salesforce–QuickBooks integration for a nonprofit customer that included:

- Creating Bills from Salesforce in QuickBooks
- Creating Invoices from Salesforce in QuickBooks
- Synchronizing Payment Status, Paid Amount, and Payment Date
- Sending approved employee timesheets to QuickBooks Payroll automatically
- Reducing manual data entry through end-to-end automation

Has Simple Timesheet been integrated with QuickBooks?

Answer

Yes. For a nonprofit customer, Digital Biz Tech implemented a Salesforce–QuickBooks integration that automated financial and payroll processes. Approved timesheets were synchronized with QuickBooks Payroll, allowing payroll processing to begin automatically after manager approval.

Can approved timesheets be sent to payroll systems?

Answer

Yes. Simple Timesheet can be customized to automatically send approved timesheets to payroll systems. For one customer implementation, approved timesheets were synchronized with QuickBooks Payroll, allowing payroll processing to begin automatically after manager approval.

Can Simple Timesheet integrate with ERP and accounting systems?

Answer

Yes. Simple Timesheet can integrate with QuickBooks, ERP systems, accounting software, payroll systems, HR systems, and third-party applications using Salesforce APIs, Apex, Flow, Platform Events, or middleware.

Is the application customizable?

Answer

Yes. Organizations can customize using standard Salesforce tools:

- Objects and Fields
- Approval Processes
- Flows and Automation
- Reports and Dashboards
- Notifications and Alerts
- Validation Rules
- Integrations
- Activity and Absence picklist values

Does Simple Timesheet support reporting and analytics?

Answer

Yes. Organizations can analyze Employee Productivity, Project Hours, Billable Hours, Non-Billable Hours, PTO Usage, Leave Trends, Timesheet Compliance, Resource Utilization, Payroll Hours, and Project Profitability using native Salesforce Reports and Dashboards.