TrueTimeTracker Guide

Welcome to TrueTimetracker

Welcome to the True Time Tracker! In this guide, we will walk you through the various features and functionalities of our Time Tracker app, designed to help you manage and optimize your time efficiently. But before we dive into the app, let's talk about why we are here.

Why are we tracking time?

- To accurately bill clients.
- To keep projects on track.
- To improve how we price projects.
- To create more accurate estimates.
- To work together better as a team

In today's fast-paced world, every minute counts. Time tracking isn't just about monitoring how you spend your day. It's about gaining valuable insights into your productivity, identifying areas for improvement, and ultimately, achieving your goals more efficiently.

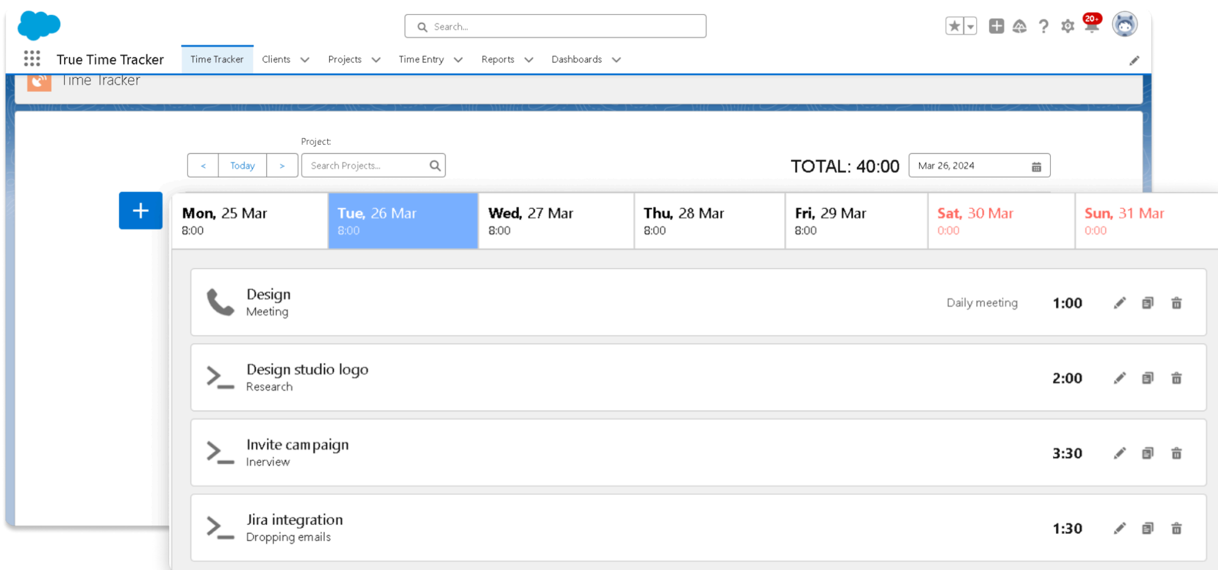
An introduction to TrueTimeTracker

Options for tracking time

- Track during your work
- Enter the time for the day or week all at once

Different people prefer different methods for tracking their time. Make sure your team is aware of all their options, so they can find what works best for them. They can enter time into their timesheets for a longer stretch of time or duplicate recurring tasks. Track time during your work or at the end of the day.

Stay in the loop and never miss a beat with our new notifications feature. Receive real-time updates on fill in time entries directly to your e-mail. With customizable alerts, you can ensure that you're always informed and ready to take action. Want to discover how notifications can enhance your workflow? Reach out to us at help@truesolv.com for more information.



Installing

Step 1: Accessing the Installation Link:

Go to AppExchange or just click [here](#):

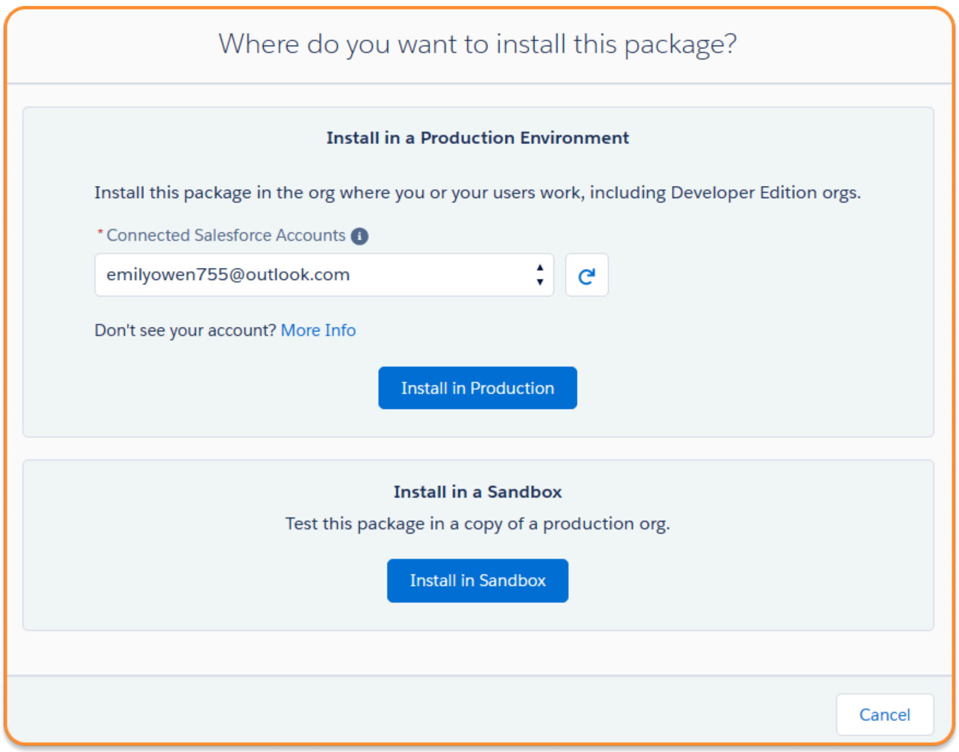
- Open your web browser and navigate to the Salesforce AppExchange platform.
- In the search bar, type "True Time Tracker" and press enter.
- Locate our Time Tracker application in the search results and click on it to access the application page.

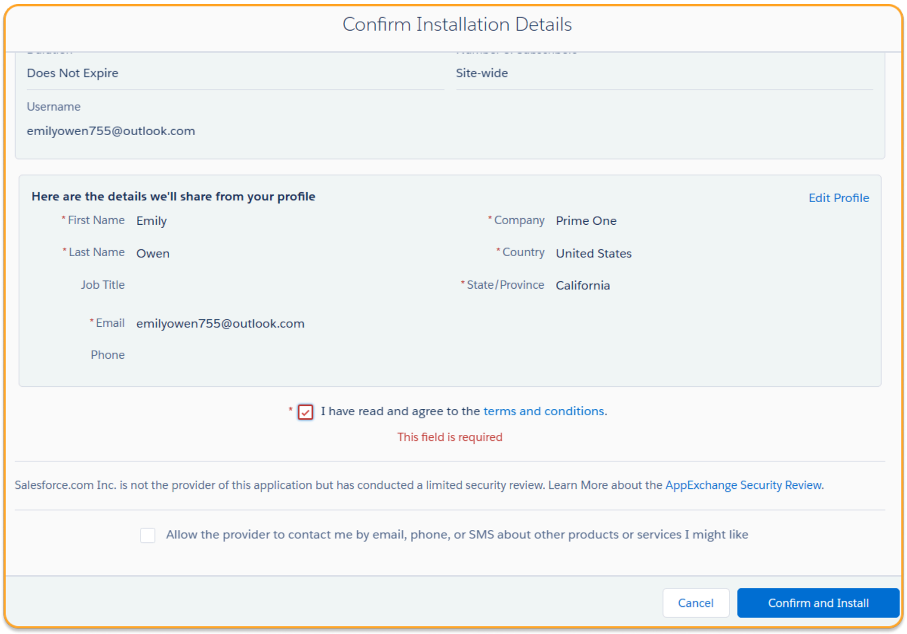
Step 2: Initiating Installation:

- Once you're on the application page, look for the "Get It Now" button and click on it to initiate the installation process.

Step 3: Confirm Installation details:

- Review the permissions required by the Time Tracker application to ensure they align with your organization's policies and requirements.
- Click on the "Confirm and Install" to proceed with the installation.





Step 4: Choosing Your Role:

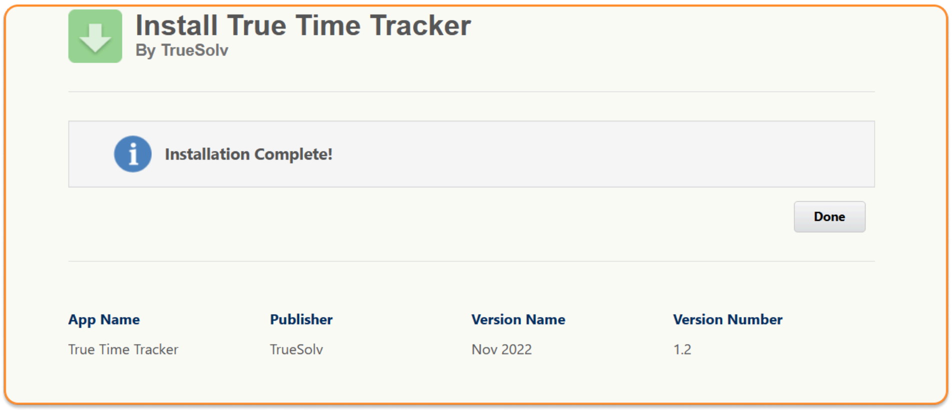
- You will be prompted to choose your role or user type within your Salesforce organization. Select the role that best aligns with your responsibilities and access needs.

Step 5: Installation Confirmation:

- After confirming the installation, you may be prompted to log in to your Salesforce account if you haven't already done so.

- Follow the on-screen instructions to complete the installation process. You may need to agree to additional terms and conditions.

  After installation, you will receive e-mail letter from Salesforce support about successfully installing of our application.



Next Steps

1. Create client

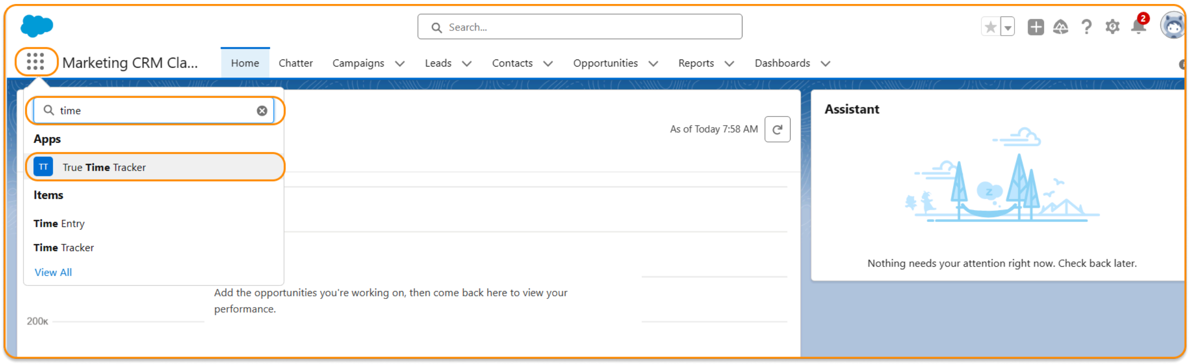
Open TrueTimeTracker- Clients — New — Fill in details — Save — Relate to the Project

Note: As an initial setup, please create at least 1 Project and 1 Client. Then you can create Time Entries.

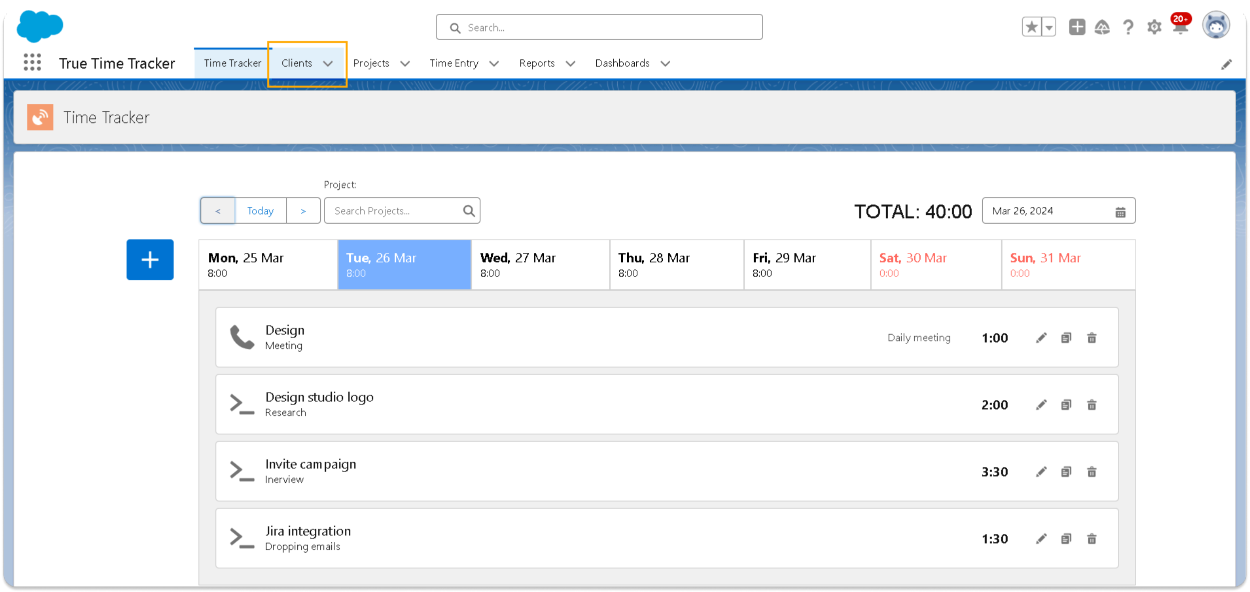
You need this setting only if your project is connected with your client. In other cases, you can directly go to the next step and mark your project as internal.

Step 1: Open TrueTimeTracker.

- To locate our application on the main screen, first, locate the menu icon and click on it. Next, navigate to the search function within the menu. Then, type in the name of our application. Finally, select our application from the search results.

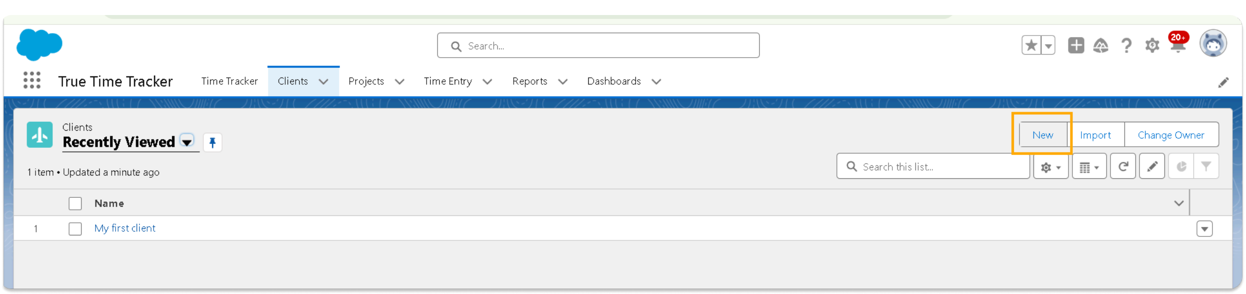


- Navigate to Clients: find the "Clients" section in the application. It's located in the main dashboard or a dedicated menu item.



Step 2: Add a New Client

Click on "New": In the client management interface, look for an option to add a new client. It is a "new" button.

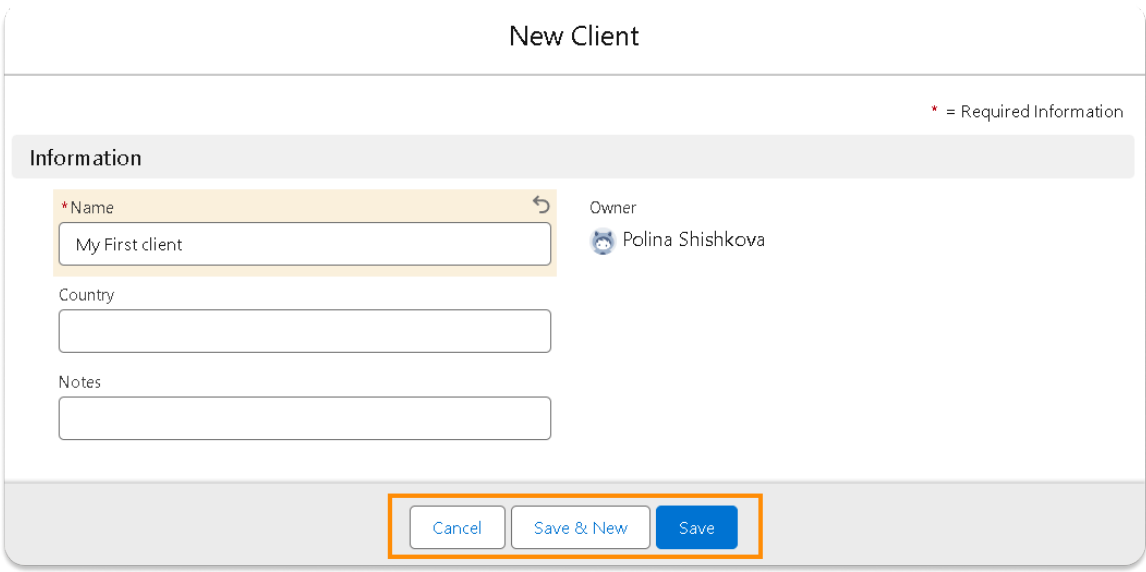


Fill in Client Details: A form will appear where you can input the details of the new client.

You'll need to provide at least the following information:

- Client Name: Enter the name of the client or the company name.
- Contact Information: It is not necessary, but you can add country and include relevant contact details such as email address, phone number in notes.

Save: Once you've filled in the necessary information, click on the “Save” button to add the client to your list.

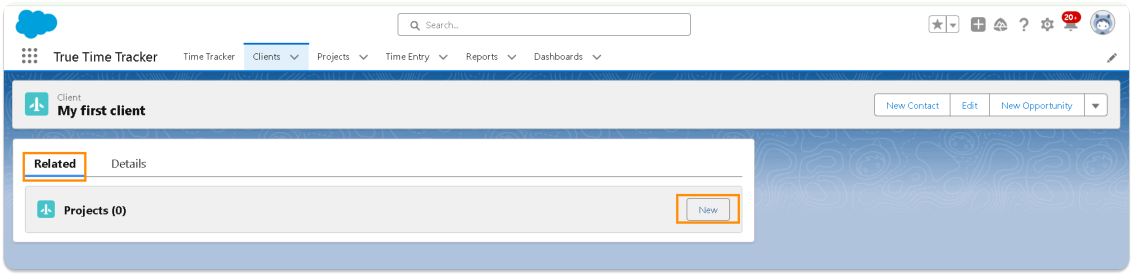


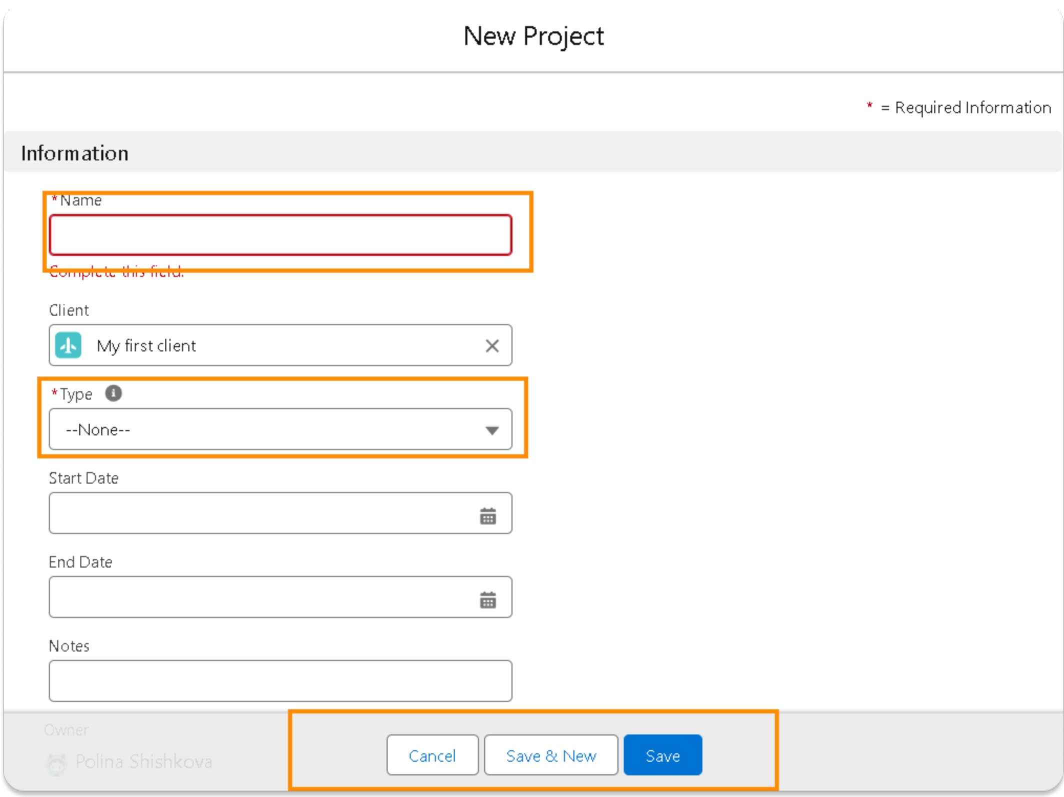
Step 3: Relate Client to the Project

Access Client Details: After creating the client, you'll be redirected to the client's details page.

Add Projects: Look on “related” page, you will be able to add projects, related with this client there.

Fill in Project Details: You can create a new project or choose any project that you already created. Similar to adding a client, you'll need to provide details about the project associated with this client.





Repeat if Necessary: If you have several clients, repeat the above steps to add all clients in app.

Step 4: Manage Client and Projects

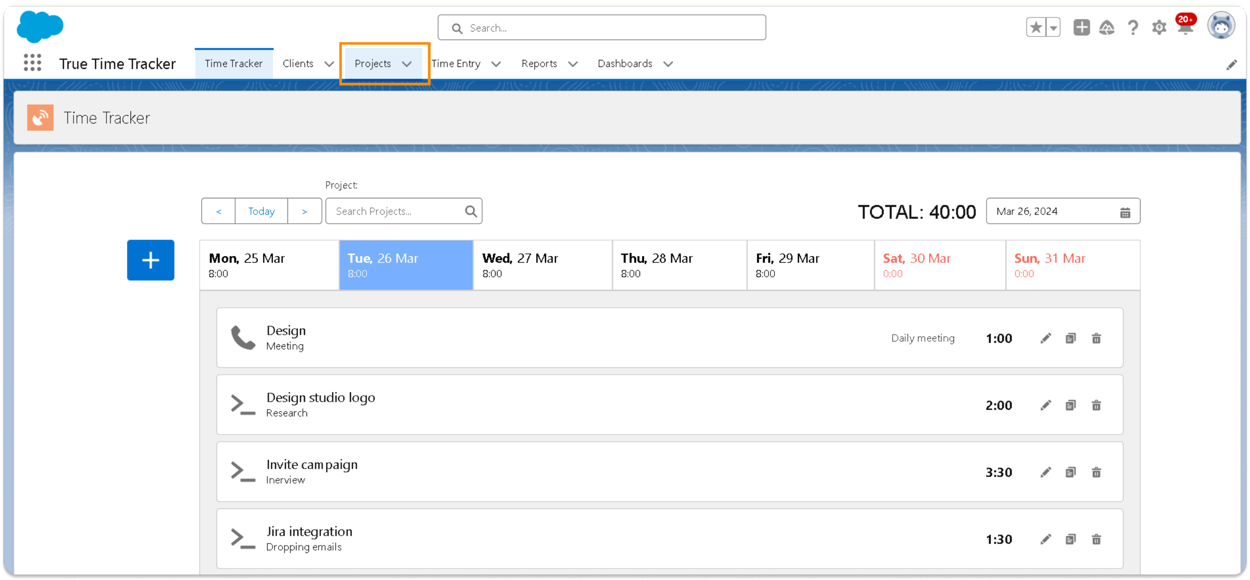
View Client Overview: After adding projects, you'll see an overview of the client's details along with a list of associated projects.

Creating a Project

True Time Tracker — Projects — New — Fill in details — Save

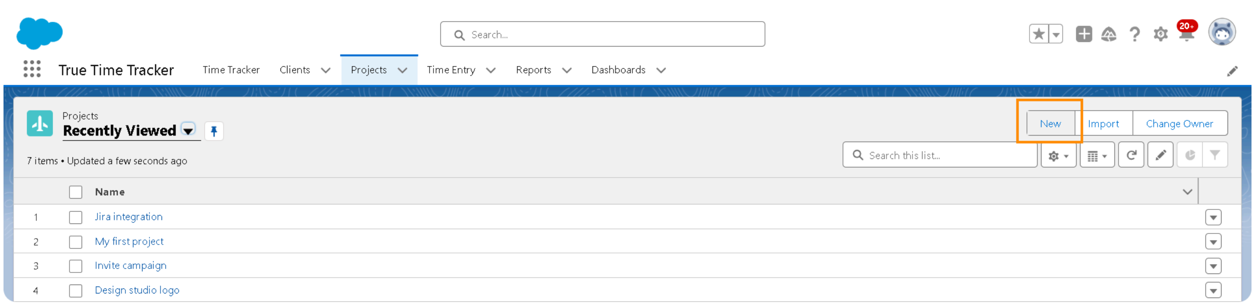
Step 1: Navigate to Projects:

Look for the “Projects” tab in the navigation menu. Click on it to enter the projects section.



Step 2: Add New Project:

Locate the "New" button and click on it. You'll be prompted to fill in details about the project.

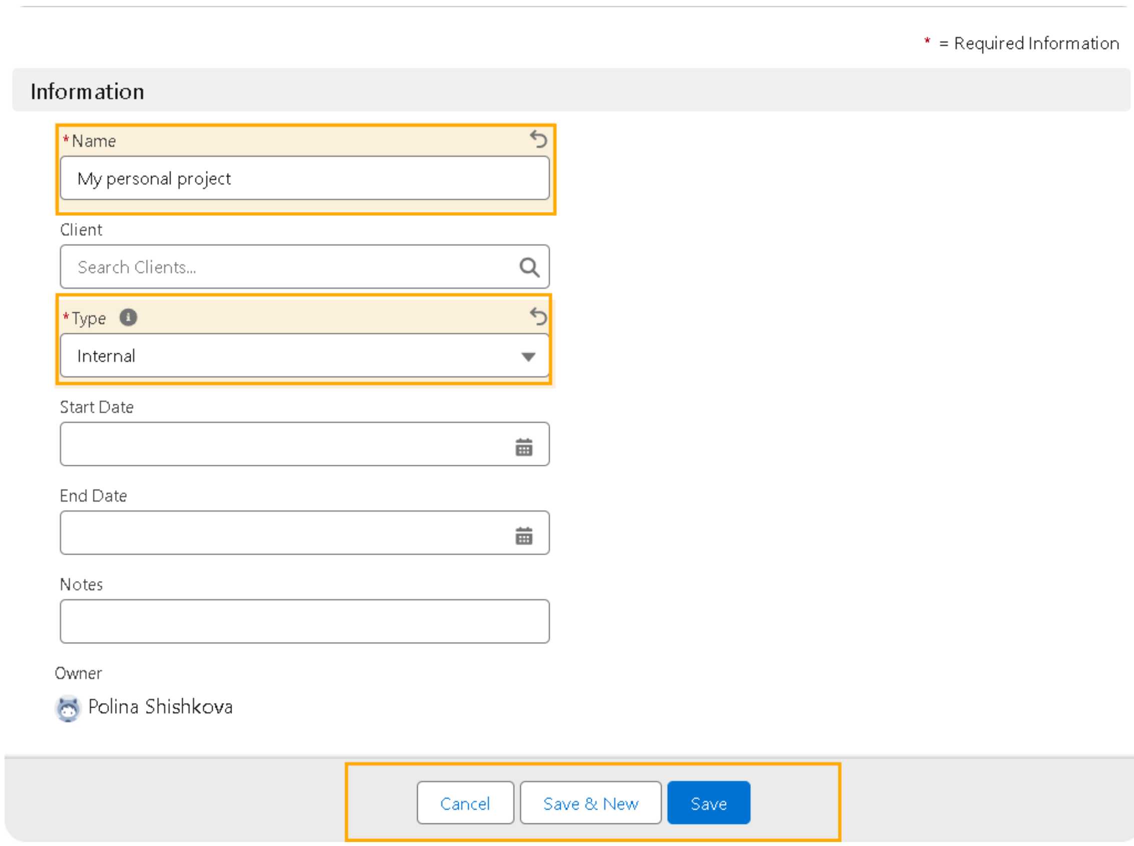


Step 3: Fill in Project Details:

Provide essential information about the project, such as the project name, client (if needed), project type, and any other relevant details. Only red fields are necessary to fill.

Step 4: Save Project:

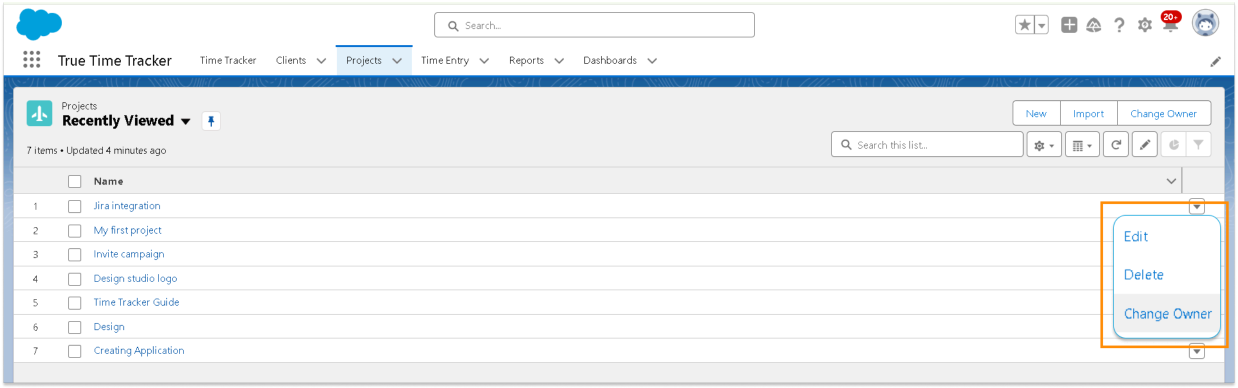
Once you've filled in the necessary information, save the project.



Step 6: Verify Project Creation: Double-check that the project has been successfully created and appears in your list of projects!

Edit or Delete: you can edit client and project details or delete them if necessary. Look for options like “Edit” within the client and project pages. Also, you can change project owner if necessary

Note: you are free to make 5 clients and 10 projects.



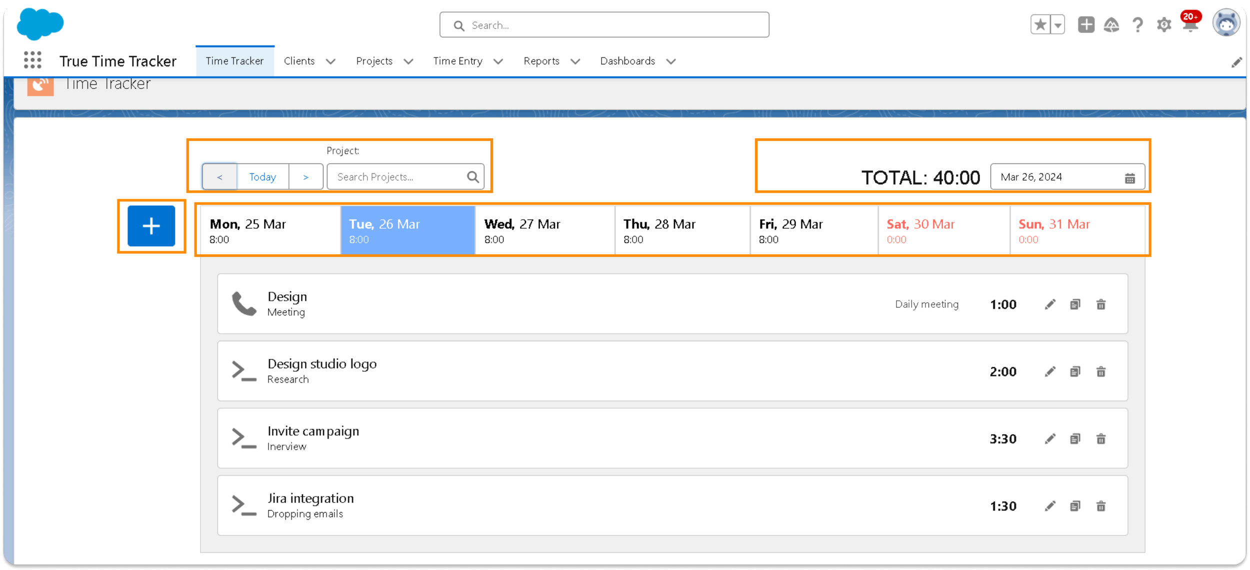
Track Time: Once projects are set up, you can start tracking time spent on each project. This helps in monitoring progress and billing clients accurately. Let's go!

Main Functionalities

Track your time

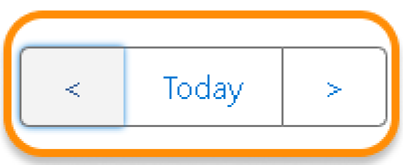
Your time will be more accurate, since you're tracking it at the moment instead of trying to remember what you did, and you can leave a note about each thing you work on. Plus, it saves you from having to worry about your timesheets at the end of the week

Welcome to the main page of your true time tracker! Let's take a look, what we have here.



Week Switch Buttons

At the top of the page, you'll find week switch buttons that allow you to navigate through different weeks. These buttons enable you to quickly switch between weeks to view and manage your time entries.



Filter by Projects

Next to the week switch buttons, you can search any project. It will show you details such as the project name, date, start and end times, and any notes attached to the entry.

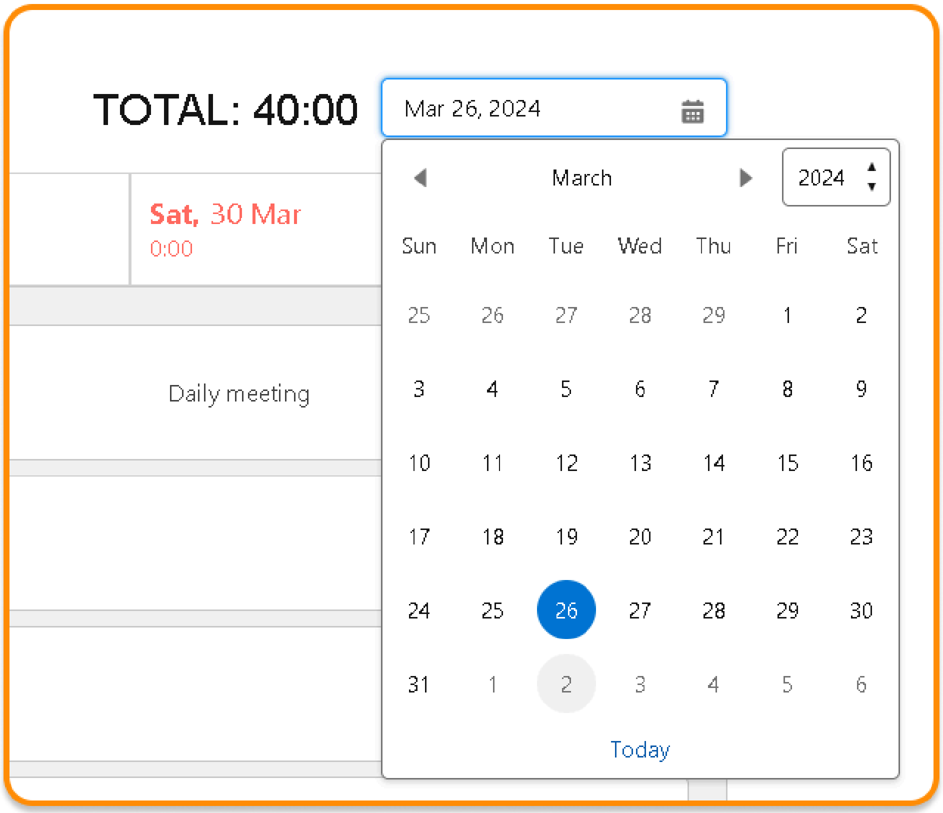
Total Working Time for Current Week

Adjacent to the time entries, you'll find the total working time for the current week. This total reflects the combined duration of all time entries recorded within the selected week.

*Take control of your time like never before. With our **expanded total time** feature, you can track and manage your hours with unprecedented granularity. Interested in learning more? Drop us an email at help@truesolv.com to explore how this feature can benefit you.*

Choose a Specific Date to Jump To

If you need to view time entries for a specific date, you can easily jump to that date using the date picker feature. Simply click on the date picker icon, select the desired date, and the page will automatically update to display time entries for that date.

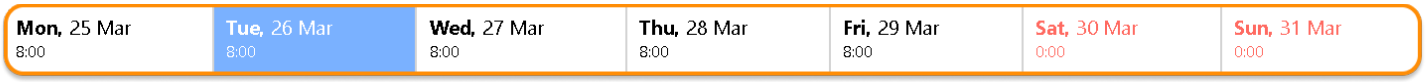


Create a New Time Entry

To add a new time entry, click on the “+” button. This action will open a modal window where you can enter details such as the project, date, start and end times, and any additional notes. Once you've filled in the required information, click “Save” to create the new time entry.

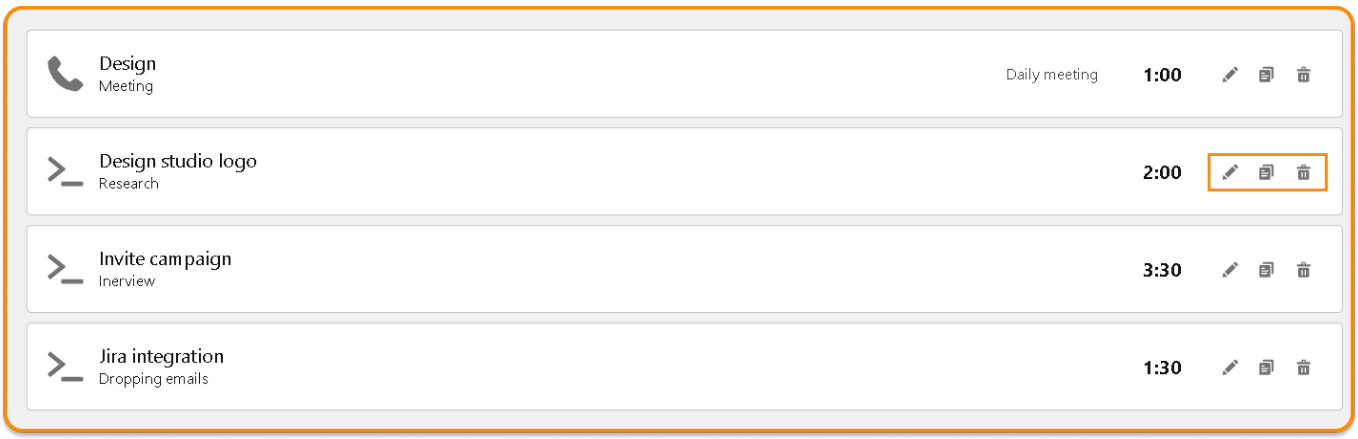
Choose Day of the Week to Show

Next to the date picker, you'll find a dropdown menu that allows you to choose a specific day of the week to display. This feature is particularly useful if you want to focus on time entries for a particular day without switching between weeks.



Time Entries Space

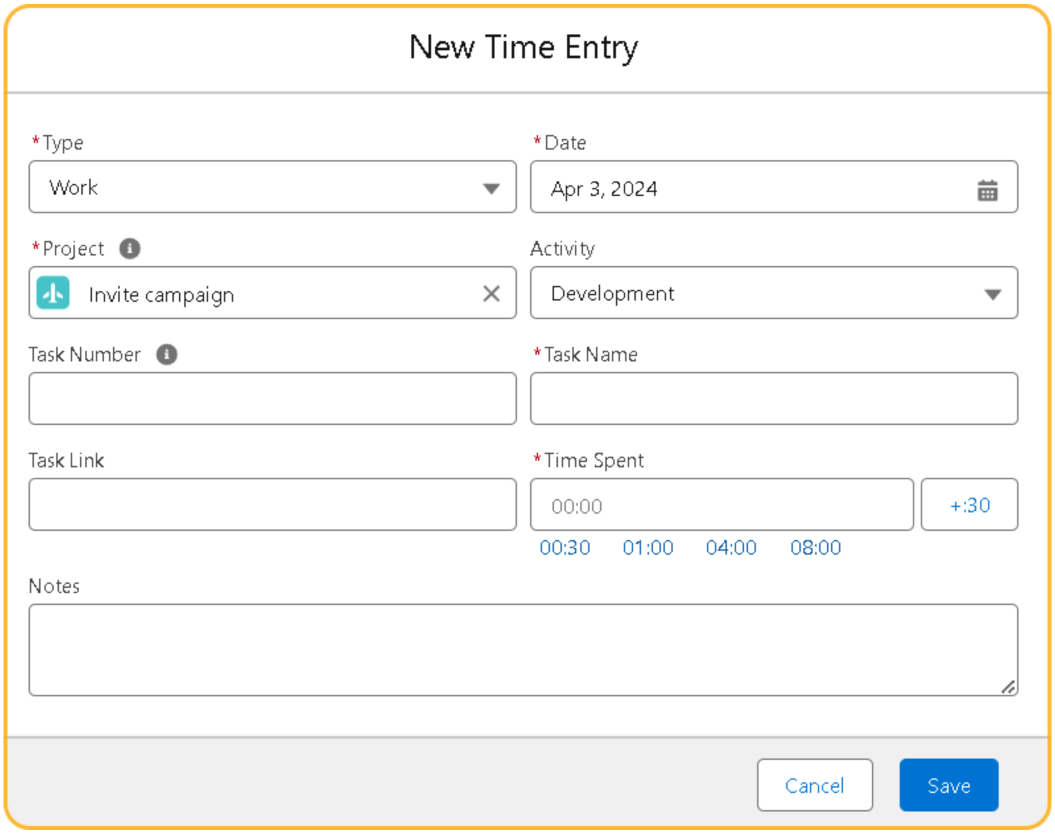
The main section of the page is dedicated to displaying your time entries. Here, you'll see a chronological list of all recorded time entries, organized by date and time. You can scroll through this space to review past entries and make any necessary edits or additions.



New Time Entry Modal

The New Time Entry Window allows you to input details about the time you've spent on various activities. It includes fields for specifying the type of time entry, logging date, project, activity type, task details, time spent, and additional notes.

All red strokes are necessary to fill.

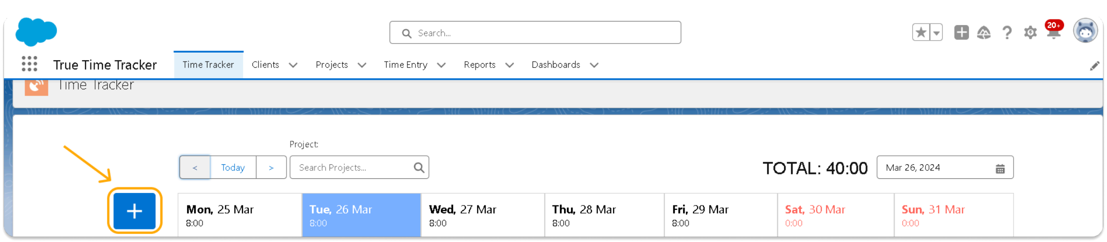


Adding a New Time Entry

+ — Fill in details — Save

Open the New Time Entry Window:

- Navigate to the "+" section and click on the corresponding button to open the New Time Entry Window. In this window firstly you should choose type of time entry such as work, holidays, vacation, or sick.



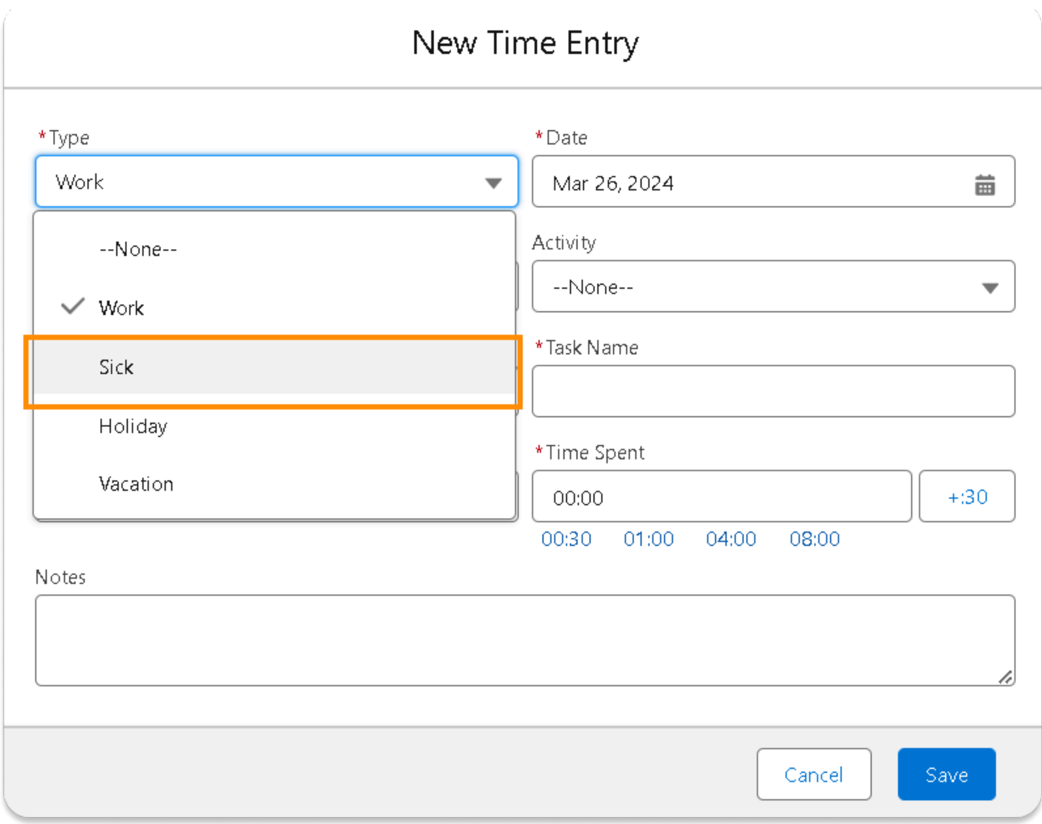
Sick Time Entry

Step 1: Open Time Entry Section:

- Open the Time Tracker app on your device

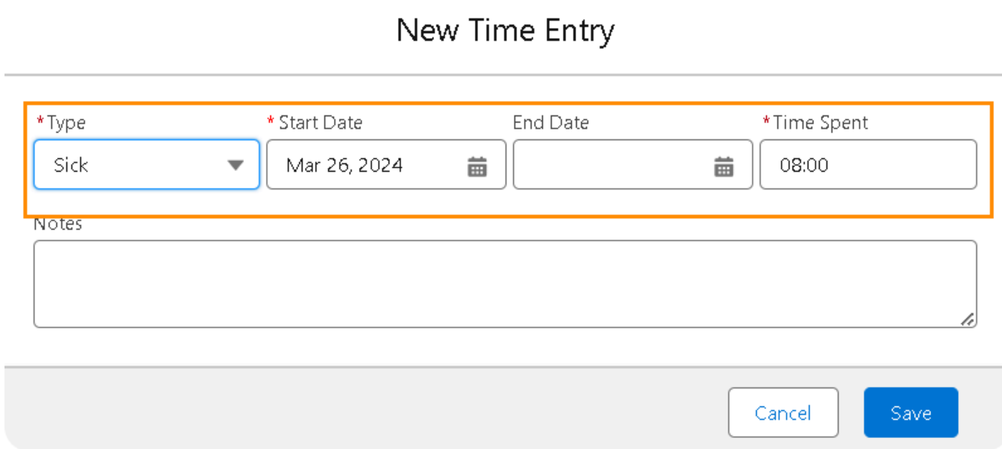
Step 2: Create New Time Entry:

- Look for the option to create a new time entry. This is a “+” button. Click on it to initiate the process of creating a new time entry.



Step 3: Choose Sick as Activity:

- In the new time entry form, you'll see a field labeled “Activity” or “Type.” Click on this field to reveal a dropdown menu of activity types.
- Scroll through the options and select “Sick” as the activity type. This categorizes your time entry as sick leave.



Step 4: Specify Start and End Date:

- Next, you'll need to specify the start and end date for your sick leave. Click on the fields labeled “Start Date” and “End Date” to enter the dates when your sick leave begins and ends.

- Use the date picker or manually input the dates in the required format.

Step 5: Add Notes (Optional):

- If you'd like to provide any additional details or notes about your sick leave, you can do so in the “Notes” field. Click on the field to enter your notes.

Step 6: Save the Time Entry:

- Once you've filled in all the necessary information, review the details to ensure accuracy.

- If everything looks correct, locate the “Save” button and click on it to save your sick leave time entry.

Step 7: Review:

You can review your time entries in the time entry section of the app to verify that the sick activity has been recorded accurately.

Vacation time Entry

Step 1: Open Time Entry Section:

- Navigate to the time entry section within the app if you're already logged in.

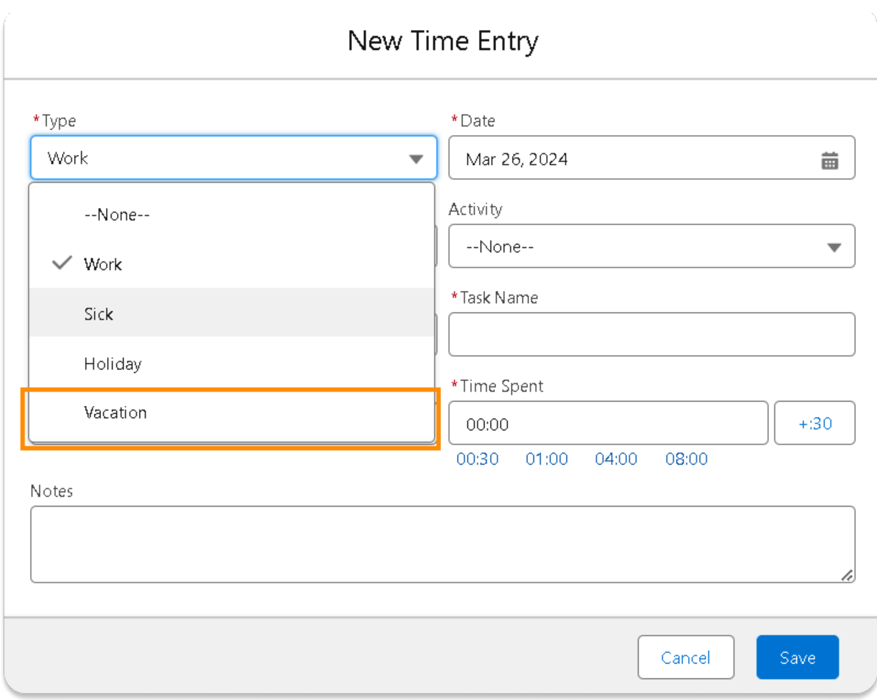
Step 2: Create New Time Entry:

- Look for the option to create a new time entry. This is a "+" button. Click on it to initiate the process of creating a new time entry.

Step 3: Choose Vacation as Activity:

- In the new time entry form, you'll see a field labeled “Activity” or “Type" Click on this field to reveal a dropdown menu of activity types.

- Scroll through the options and select “Vacation” as the activity type. This categorizes your time entry as vacation leave.



Step 4: Specify Start and End Date:

- Next, you'll need to specify the start and end date for your vacation leave. Click on the fields labeled “Start Date” and “End Date” to enter the dates when your vacation begins and ends.

- Use the date picker or manually input the dates in the required format.

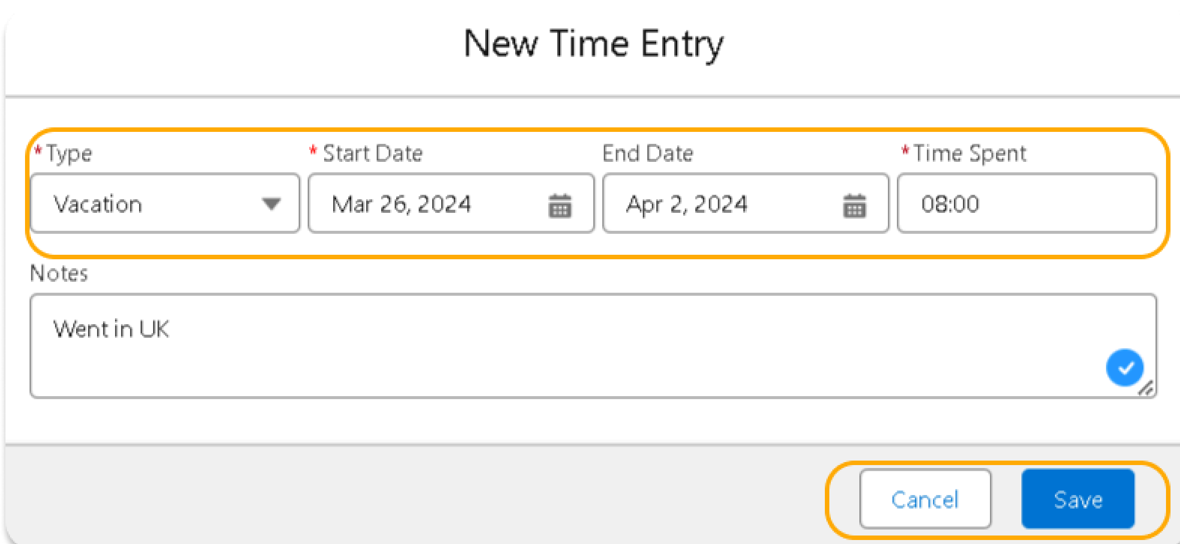
Step 5: Add Notes (Optional):

- If you'd like to provide any additional details or notes about your vacation leave, you can do so in the “Notes” field. Click on the field to enter your notes.

Step 6: Save the Time Entry:

- Once you've filled in all the necessary information, review the details to ensure accuracy.

- If everything looks correct, locate the “Save” or “Submit” button and click on it to save your vacation leave time entry.



Step 7: Review:

- You can review your time entries in the time entry section of the app to verify that the vacation activity has been recorded accurately.

Achieve a better work-life balance with our vacation tracker feature. Easily schedule and manage your time off, view upcoming holidays, and coordinate with your team effortlessly. Curious about how our vacation tracker can simplify your time off management? Shoot us an email at help@truesolv.com to find out more.

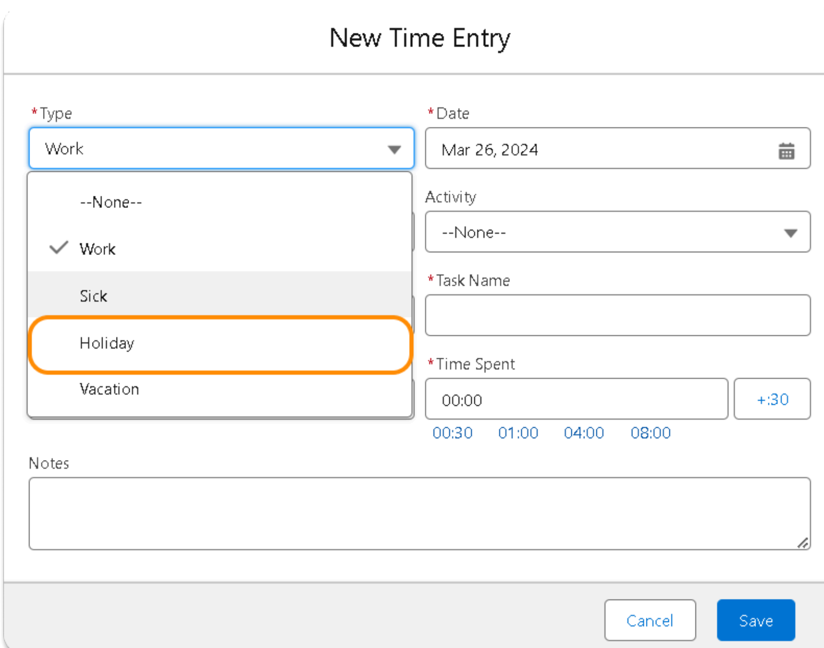
Holiday time Entry

Create New Time Entry:

- Navigate to the "+" section on the main page.

Choose Holiday:

- Within the time entry form, select the option for "Holiday" from the activity dropdown menu. This indicates that you are requesting time off for a holiday.



Specify Start and End Date:

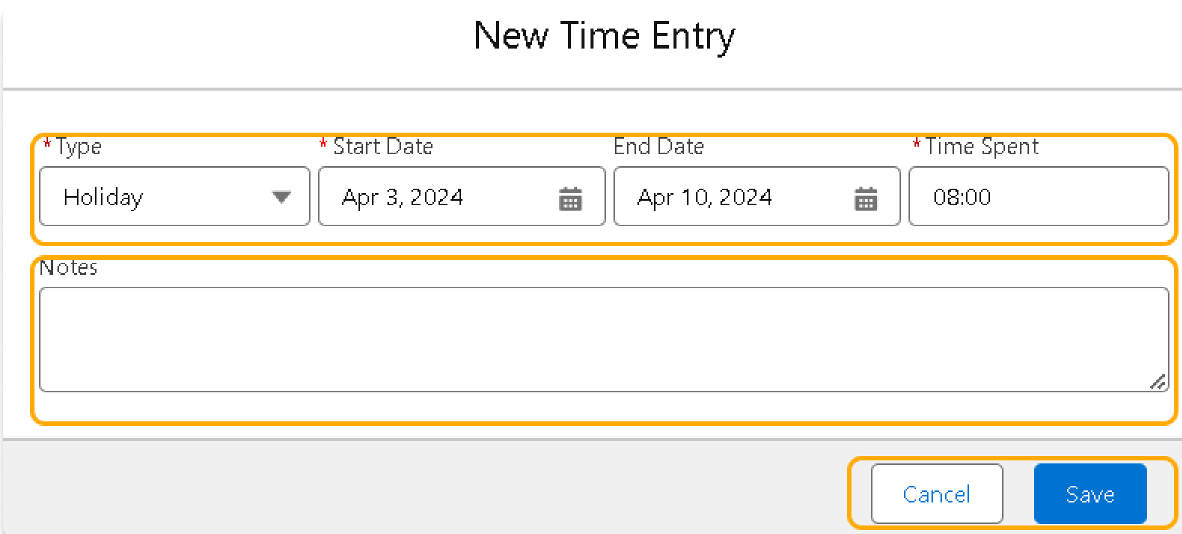
- Enter the start and end dates for the holiday period. This indicates the duration for which you will be off work due to the holiday.

Add Notes (If Necessary):

- Optionally, you can add notes to provide additional context or information regarding your holiday request. This could include details about the holiday or any special arrangements.

Save Time Entry:

- Review the details of your holiday request to ensure accuracy. Once satisfied, click on the “Save” or “Submit” button to save the time entry. This notifies your manager of your holiday request.



Work time entry

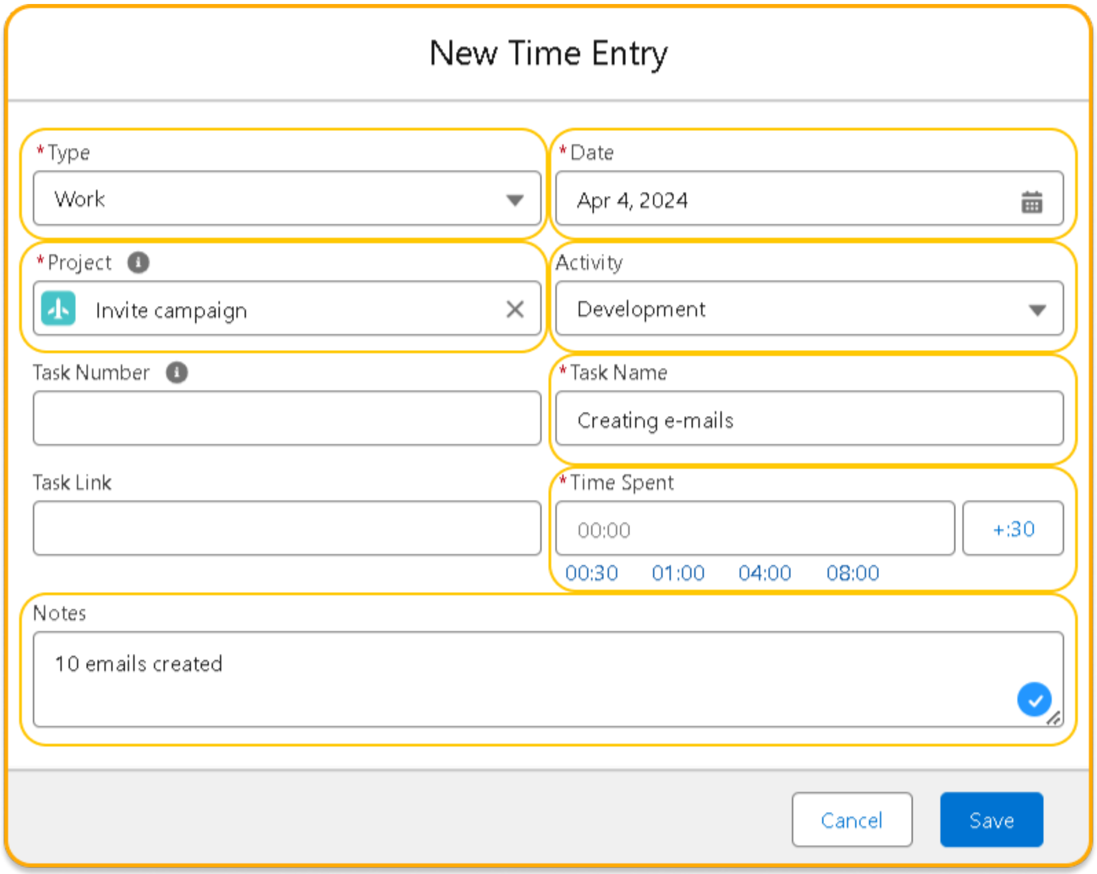
Step 1. Create time entry.

- Navigate to the “+” section on the main page.

- Within the time entry form, select the option for “Work” from the activity dropdown menu. This type of activity will always be selected by default.

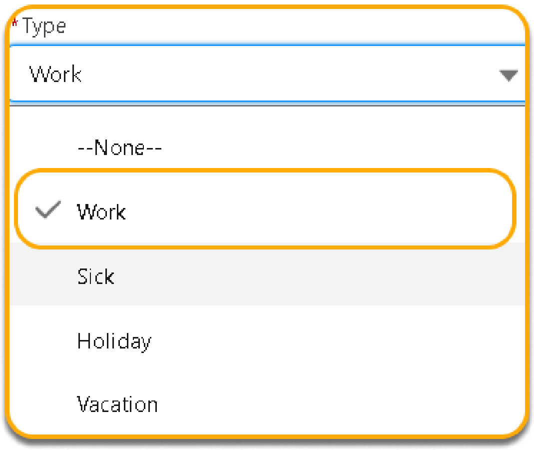
Step 2. Fill in details :

- Enter the required information into each field of the New Time Entry Window, including the type of time entry, logging date, project name, activity type, task details, time spent, and any additional notes.



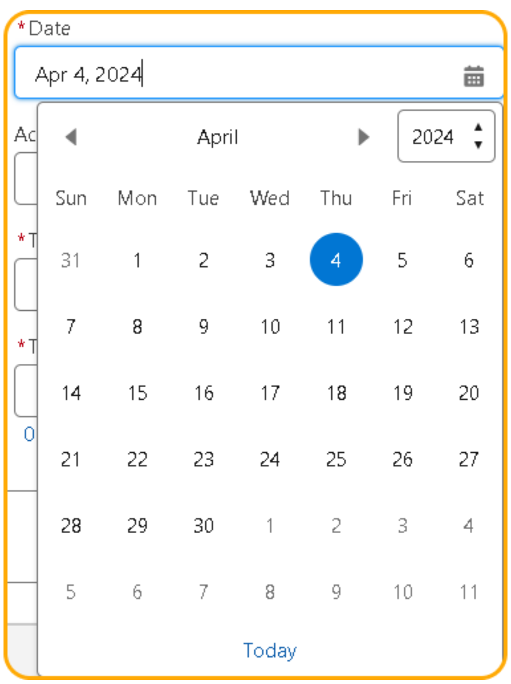
Type of Time Entry (Work)

Choose the type of time entry from predefined options. This helps in categorizing different types of time off or leave.



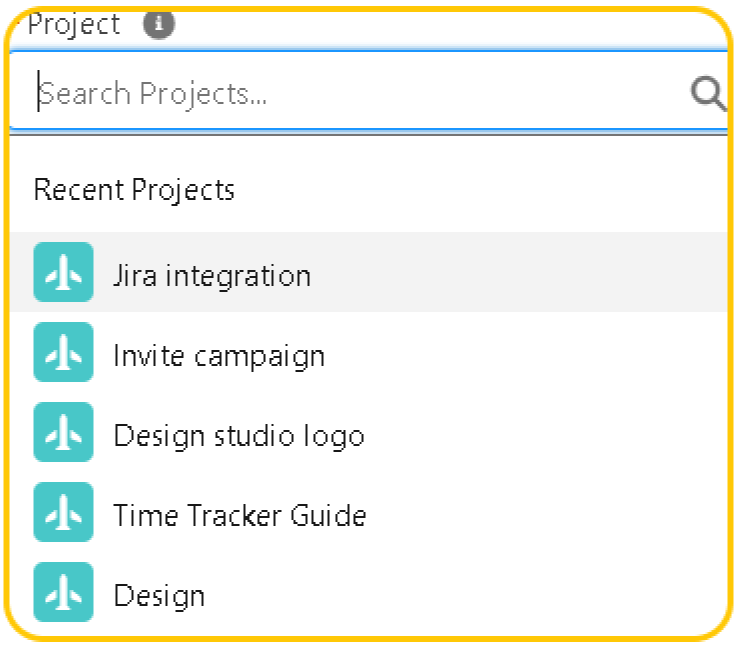
Logging Date (Today by Default)

By default, the logging date is set to today's date. However, you can manually select a different date if you're entering time for a past or future date.



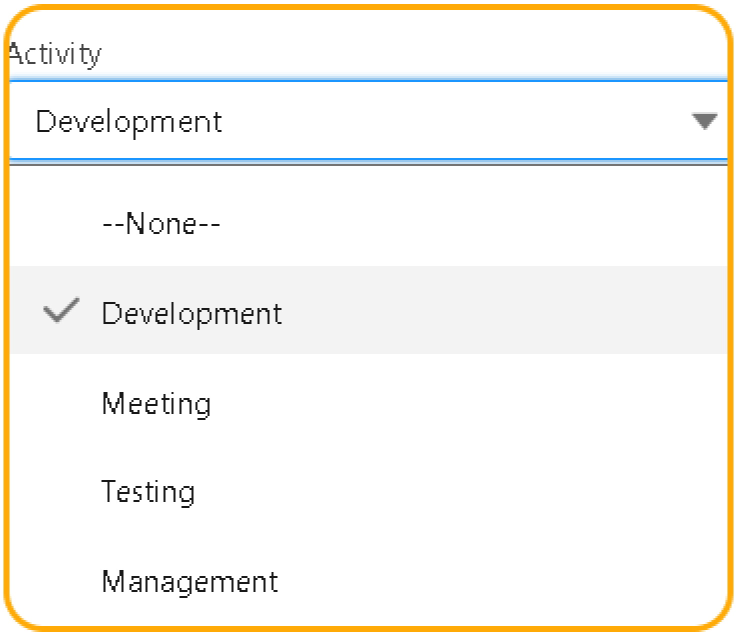
Project Name

Select the project associated with the time entry from a list of available projects. This allows you to allocate time spent on specific projects accurately. By default, you will see the last project which you track and work on in this field.



Type of Activity (Development, Meeting, Testing, Management):

Choose the type of activity performed during the time entry. This could include development tasks, meetings, testing activities, or management-related tasks.

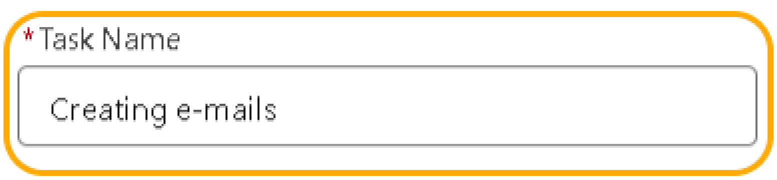


Task Number

Enter the task number associated with the time entry, if applicable. This helps in tracking time spent on specific tasks within a project.

Task Name

Provide a descriptive name for the task associated with the time entry. This helps in identifying the nature of the work performed.

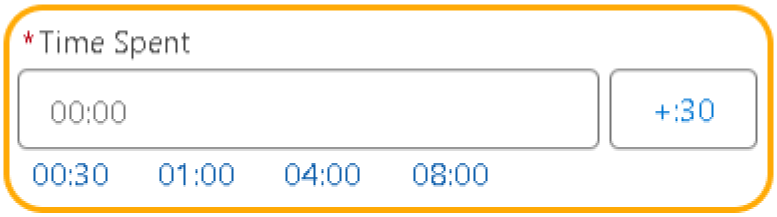


Task Link

Optionally, include a link to the task or project management tool where more details about the task can be found. This facilitates easy access to relevant task information. You can use integration with Gitlab and Jira if it is relevant for you. Eager to explore the possibilities of integrations? Drop us a line at help@truesolv.com and let's discuss how this feature can optimize your workflow.

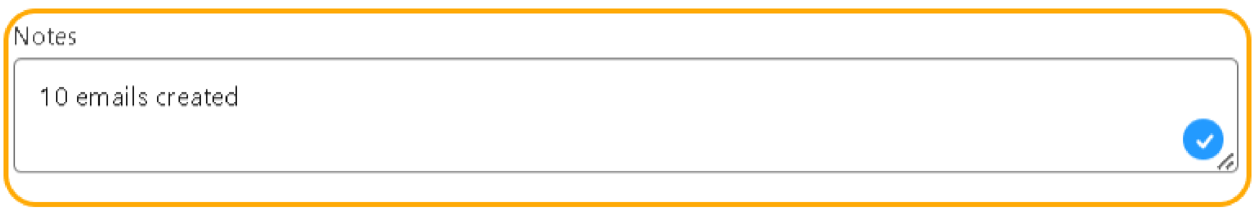
Time Spent

Specify the duration of time spent on the activity. This could be entered in hours and minutes to accurately reflect the time allocation.



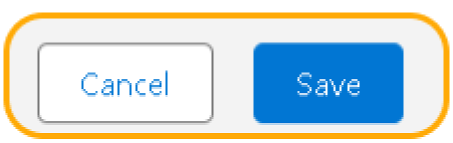
Notes

Include any additional notes or comments related to the time entry. This could provide context about the work done, milestones achieved, or any other relevant details.



Step 3. Save the Entry:

- Once you've filled in all the necessary details, click on the "Save" button to create the new time entry.

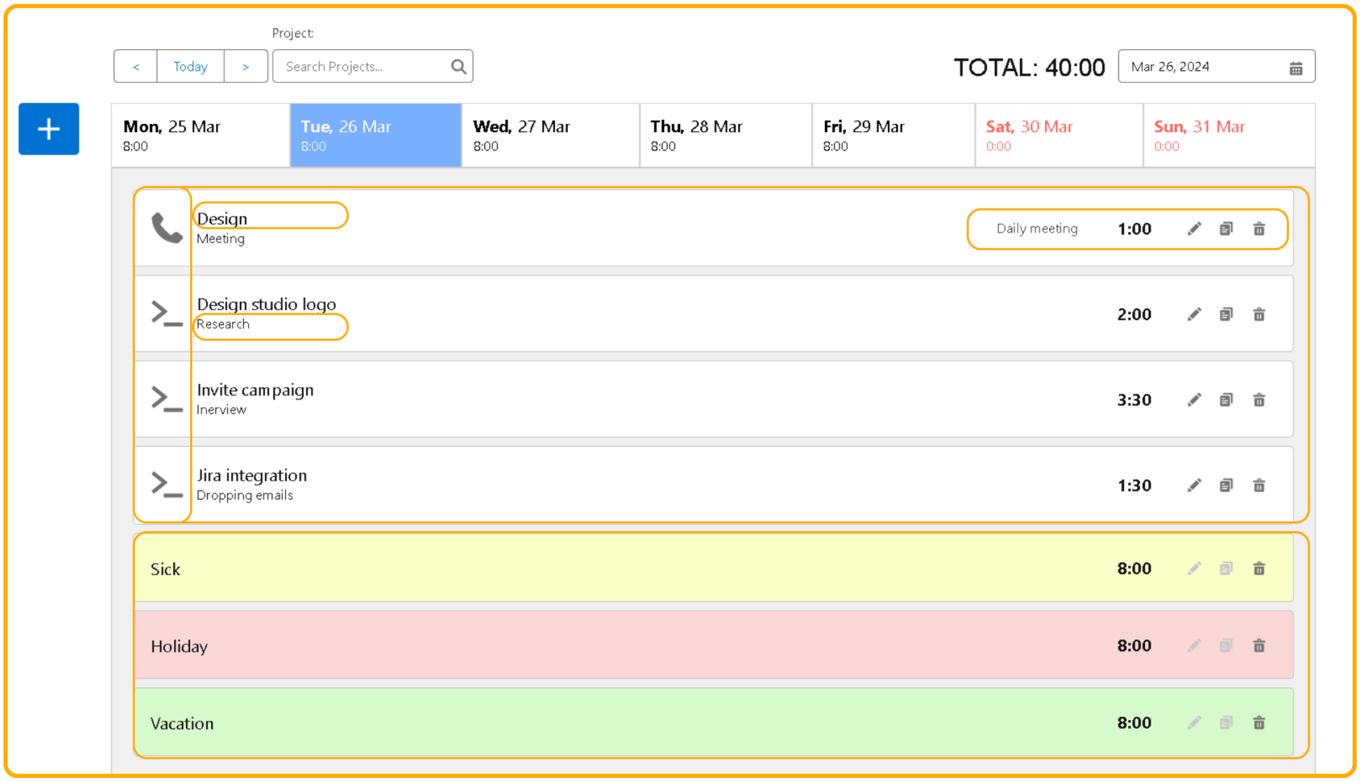


Step 4. Review and Edit:

- After saving the entry, review the details to ensure accuracy. If needed, you can edit the entry later to make any necessary changes.

The New Time Entry Window in your time tracker application provides a streamlined interface for capturing and documenting your work activities. By understanding each field and accurately inputting relevant information, you can maintain precise records of your time allocation and improve your productivity and project management processes.

Time Entries List

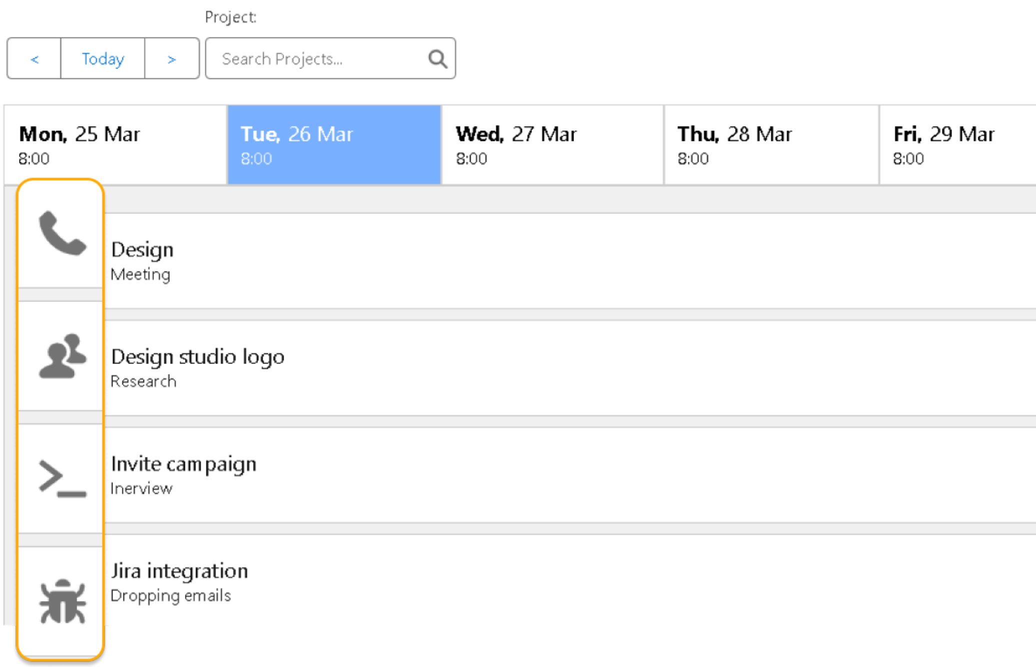


The Time Entry Tile provides a compact and informative view of each time entry. It contains essential details about the activity, project, task, notes, time spent, and options to edit, clone, or delete the entry.

Components of the Time Entry Tile:

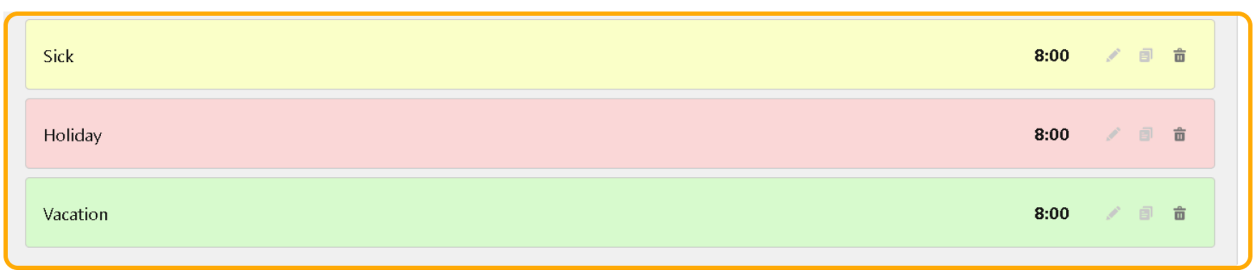
Activity (Work Subtype)

Indicates the type of activity performed during the time entry. This could be categorized into different work subtypes such as meetings, managing, developing etc. It helps in tracking how time is allocated across different types of work.



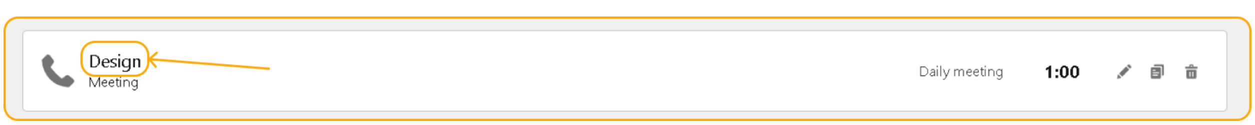
Nonwork Time Entries

If the time entry is for a non-work-related activity, such as vacation, holiday or sick, it will be clearly labeled as such to distinguish it from work-related entries.



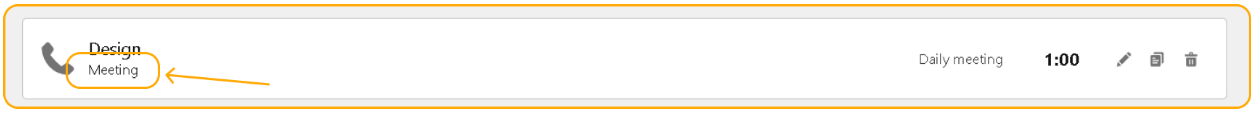
Selected Project

Displays the project associated with the time entry. This helps in categorizing time spent on different projects for billing, reporting, and project management purposes.



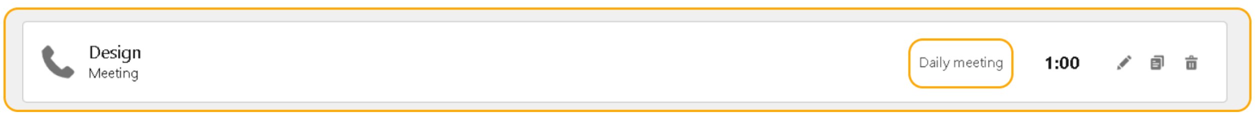
Task

Shows the task related to the time entry, typically in the format [Task Number – Task Name]. Additionally, if there is a URL associated with the task, it may be provided to enable quick access to relevant task details.



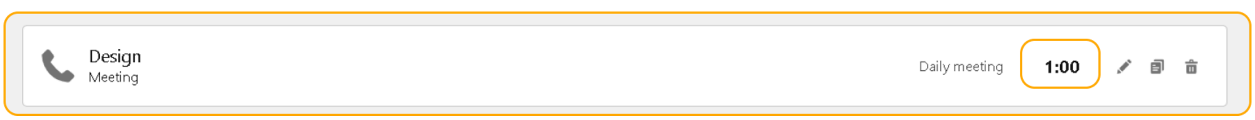
Notes

Provides any additional information or context related to the time entry. Users can add notes to describe the work done, milestones achieved, or any other relevant details.



Time Spent

Indicates the duration of time spent on the activity. This could be displayed in hours and minutes, making it easy to track and analyze time allocation.



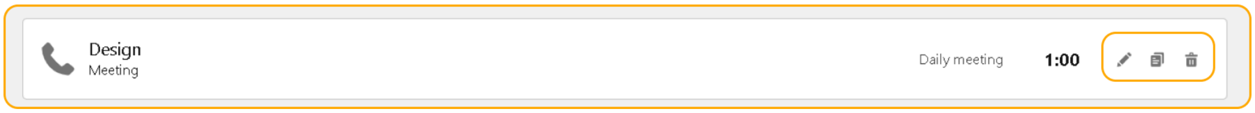
Edit, Duplicate, Delete Buttons

Offers options to modify or manage the time entry.

- Edit. Allows users to make changes to the details of the time entry, such as the activity, project, task, notes, or time spent. Click on the “Edit” button to modify any aspect of the time entry, then save your changes.

- Clone. Enables users to duplicate the same time entry for different days. Use the “Clone” button to duplicate a time entry with similar details.

- Delete. Allows users to remove the time entry from the records if it was created in error or is no longer relevant. Click on the “Delete” button to remove the time entry from the records. Confirm the action to permanently delete the entry.



Viewing Time Entries. Scroll through the list of Time Entry Tiles to review past entries and their details.

The Time Entry Tile in your time tracker application provides a concise yet comprehensive view of your time entries, allowing you to manage your work activities effectively. By understanding its components and how to interact with them, you can maintain accurate records of your time allocation and improve your productivity and project management processes.

Reports and Dashboards

Using dashboards and reports is essential for data-driven decision-making, improving operational efficiency, and driving business success. By harnessing the power of data visualization and analysis, you can unlock valuable insights and optimize performance. This features will help you to

- Visualize Data
- Gain Insights
- Track Progress
- Identify Opportunities and Risks
- Enhance Communication and Collaboration
- Optimize Resource Allocation

- Measure Performance

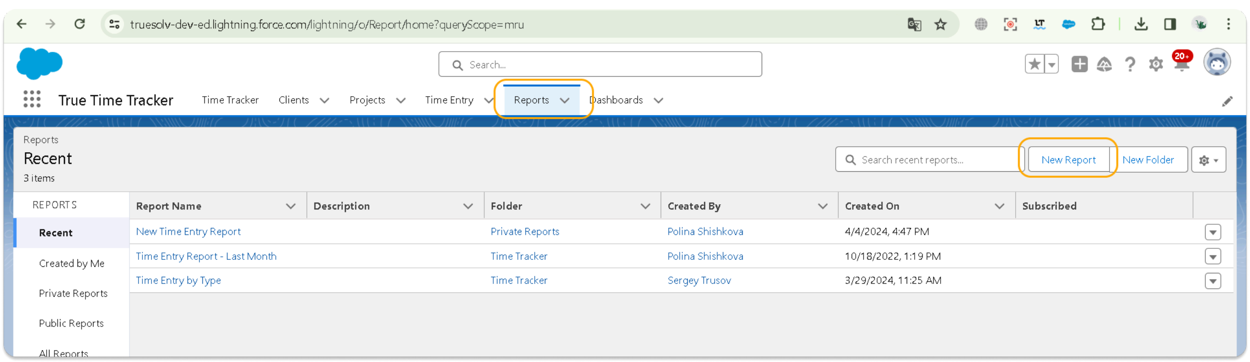
If you're already a Salesforce user, you'll find creating dashboards and reports in our Time Tracker Application to be a breeze. However, we understand that new features can sometimes be daunting, so we've prepared a small instruction to guide you through the process seamlessly.

Creating a Report:

Reports - New - Select report type - Use Filters, Groups and Columns - Save - Fill in details - Run

Navigate to Reports:

- Log in to your Salesforce account and locate the "Reports" tab in the navigation menu.

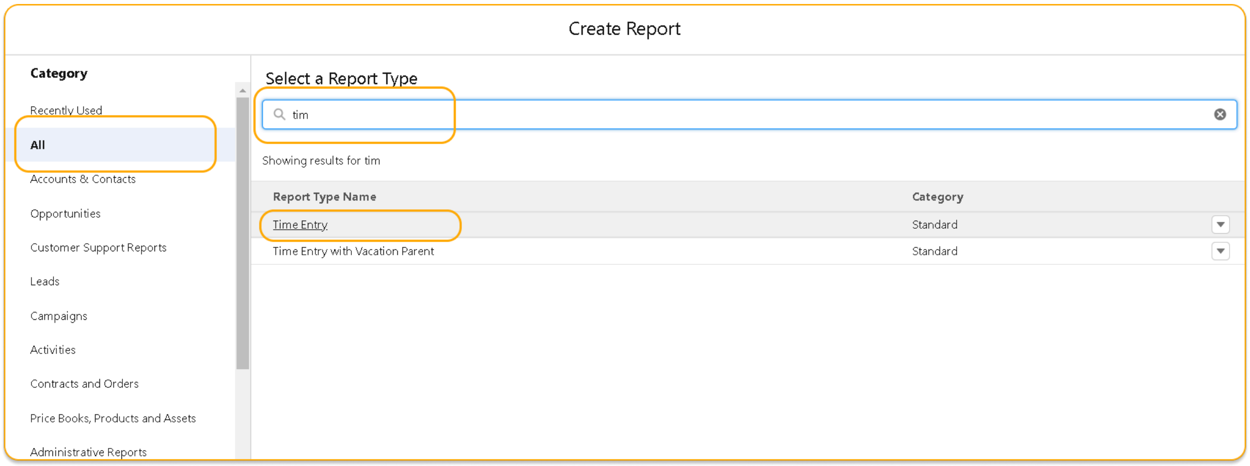


Create a New Report:

- Click on the “New” button to begin creating a new report.

Select Report Type:

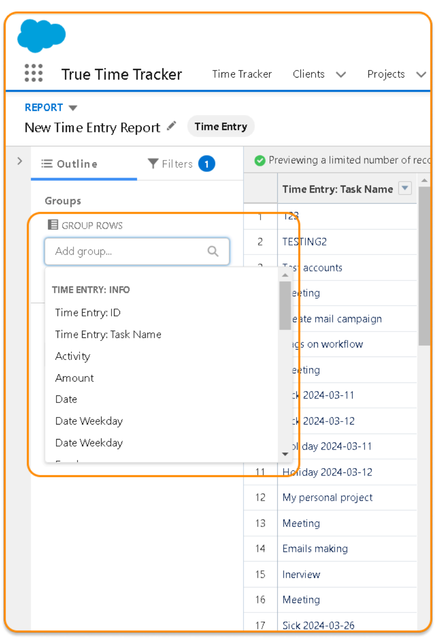
- In the “Select Report Type” window, scroll down or use the search bar to find and select “Time Entry” as the report type.

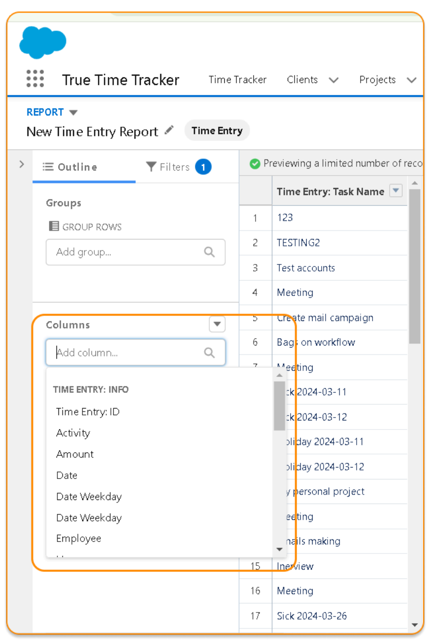


__Note: we create two types of reports for you, such as time entry and time entry with vacation parent. Fell free to use both of it!__

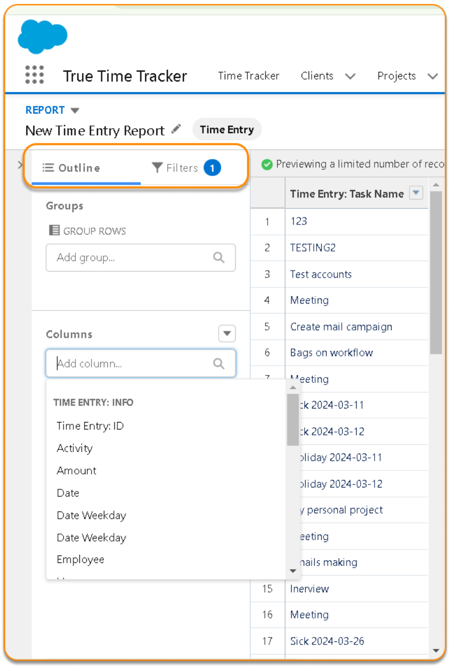
Customize Report Layout:

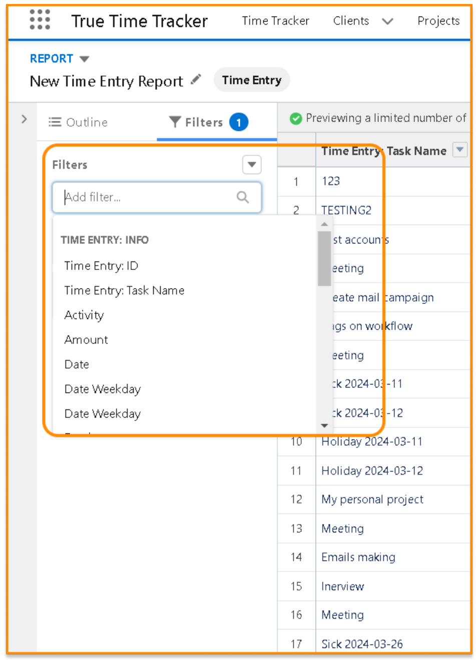
- Once you've selected the report type, you'll be taken to the report builder interface. Here, you can customize the layout of your report.
- Use the "Columns" pane to add fields to the report, and the "Groupings" pane to group data by specific criteria.





- You can also add filters to refine your data by clicking on the "Filters" pane and selecting the desired filter criteria from the pick-list.



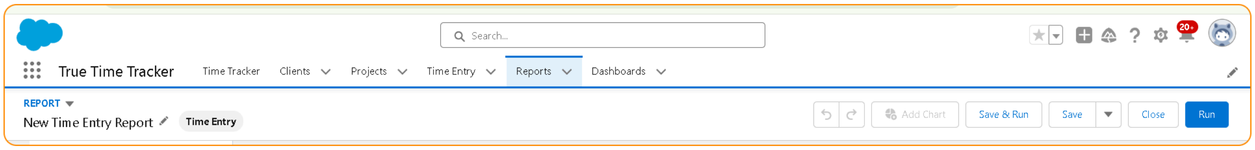


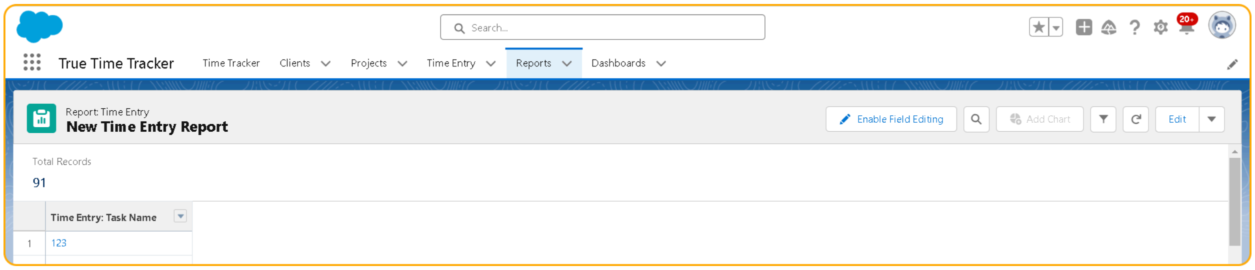
Save and Run Report:

- After customizing the report layout, click on the "Save & Run" button.

- Fill in the report name, description, and choose a folder to save the report in. Creating folders can help with organization.

- Click "Save" to save the report. You can edit the report at any time by clicking on the "Edit" button.





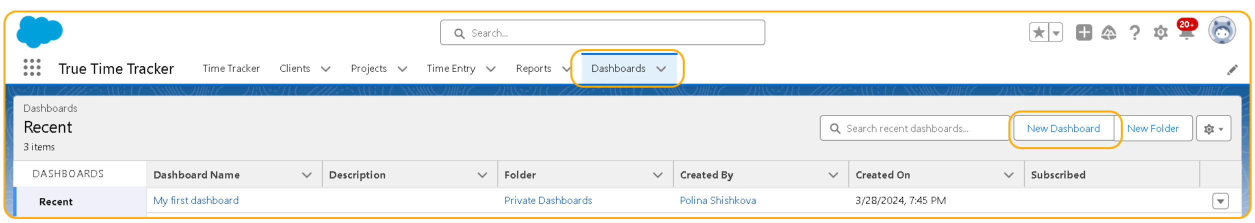
Creating a Dashboard:

Navigate to Dashboards:

- From the Salesforce home page, locate the “Dashboards” tab in the navigation menu and click on it.

Create a New Dashboard:

- Click on the “Create New Dashboard” button to start creating a new dashboard.

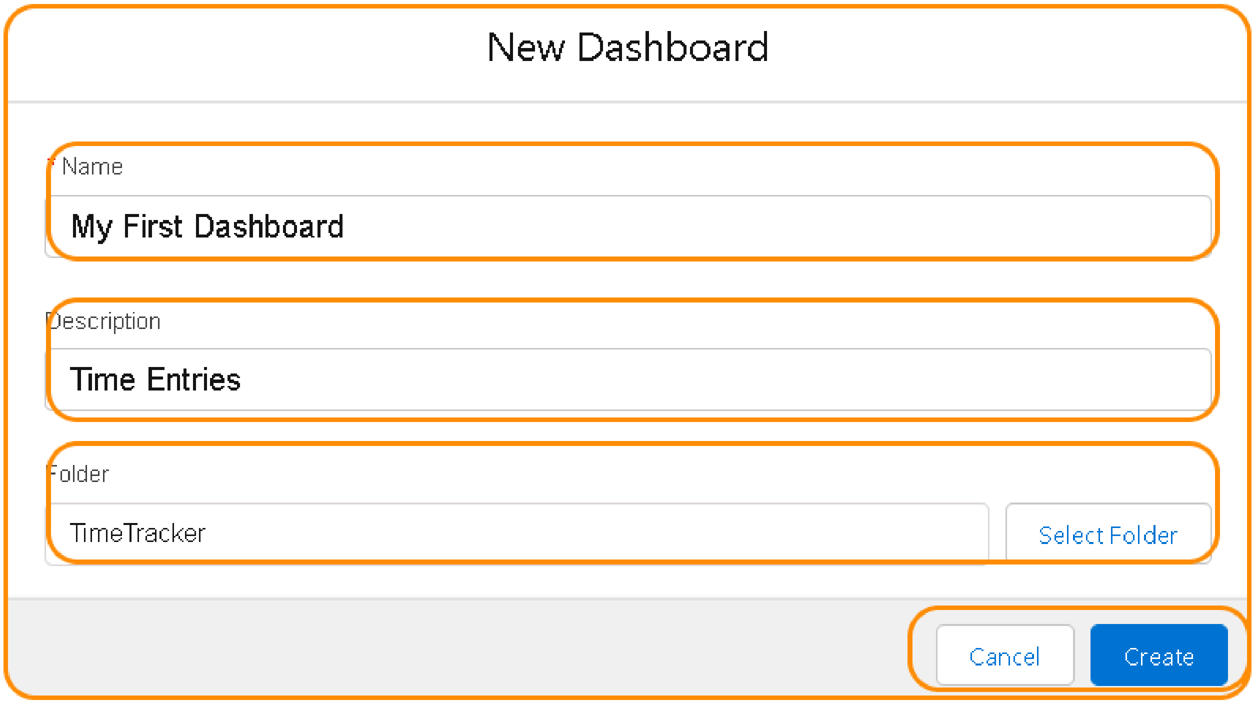


Add Details:

- In the “New Dashboard” window, enter the name and description for your dashboard.

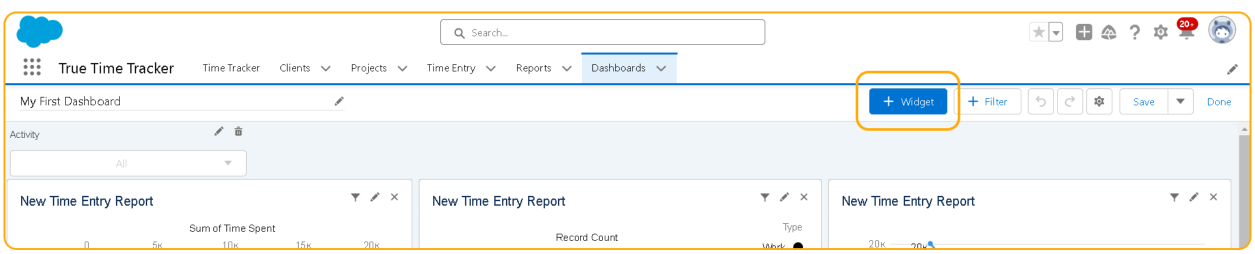
Select Folder:

- Choose a folder to save your dashboard in. If you haven't created a folder yet, you can do so by clicking on the “Create New Folder” button.



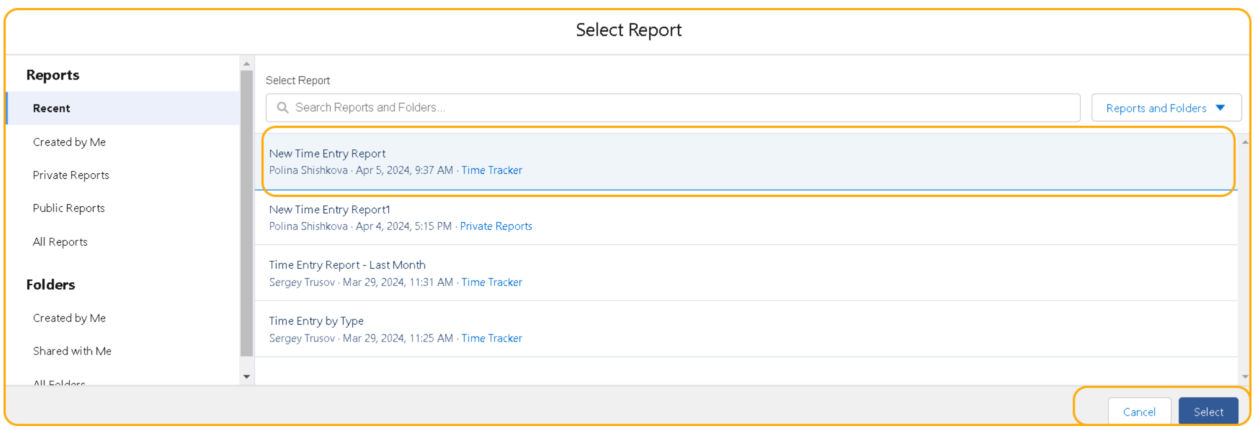
Add Widget:

- After creating the dashboard, click on the “+ Widget” button to add components to your dashboard.
- You can add various types of widgets such as charts, tables, text, or images.



Select Report:

- Select the report you created earlier from the dropdown menu. This report will serve as the data source for your dashboard widget.

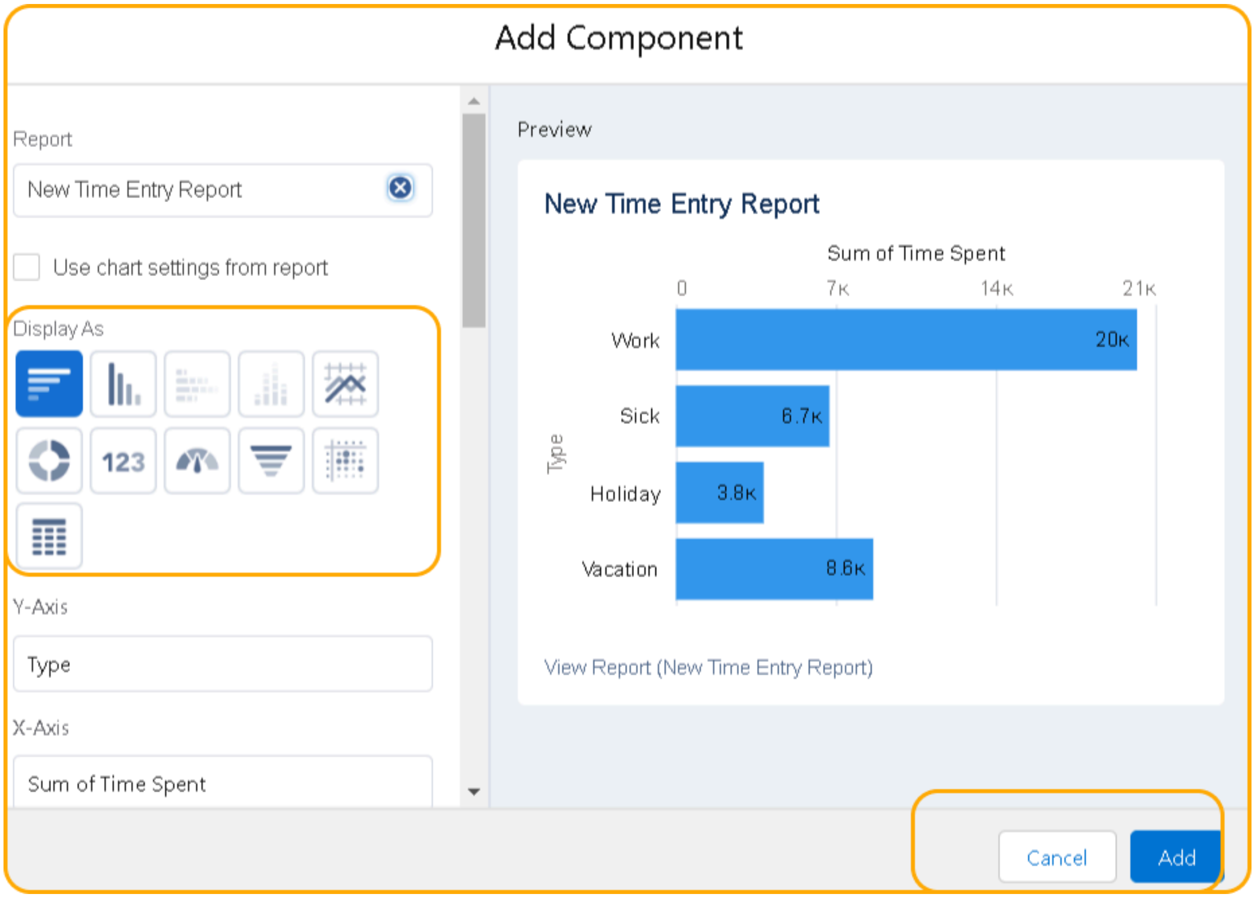


Fill in Details:

- Fill in the details for the widget, including the chart type and any customization options.
- Choose any chart type that suits your data visualization needs, such as bar charts, line charts, or pie charts.

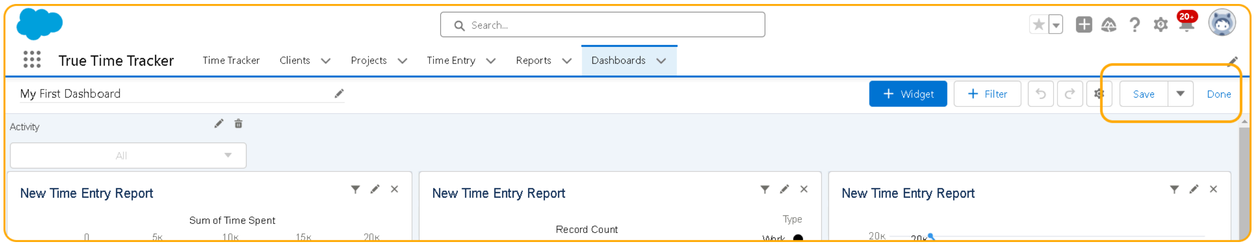
Customize Chart:

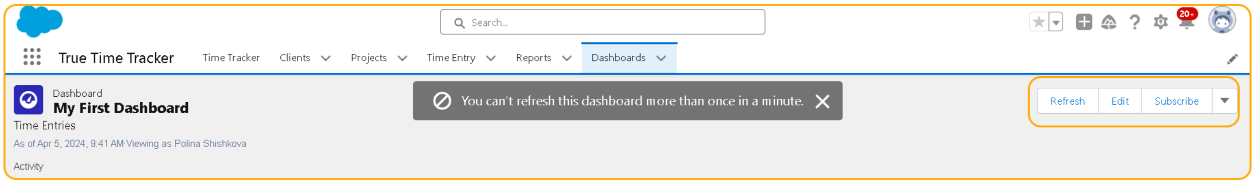
- Customize the chart as required, such as adjusting colors, labels, axes, etc., to make it more visually appealing and informative.



Save and Edit:

- Once you're satisfied with your dashboard widget, click on the "Save" button to save your dashboard. Click "Done" if you finish creating.
- You can edit your dashboard at any time by clicking on the "Edit" button.





Congratulations! You have successfully created reports and dashboards in the Time Tracker Application. These powerful tools will enable you to gain valuable insights into your time tracking data, helping you make informed decisions and optimize your workflow.

If you have any questions or require further assistance, don't hesitate to reach out to our support team on **help@truesolv.com** . Happy reporting and dashboarding!

Let's sum up our journey!

As you embark on your journey with our Time Tracker Application, we extend our warmest wishes to you. May this tool empower you to manage your time effectively, optimize your workflow, and achieve your goals with ease. May it bring clarity to your tasks, efficiency to your processes, and success to your endeavors.

Remember, each moment you track brings you closer to your aspirations and dreams. Embrace the power of time management, and let our app be your faithful companion on your path to productivity and fulfillment.

Wishing you all the best in your endeavors!

Warm regards,

TrueSolv team

Contact us

Need Help or Have Questions?

Have a question about our time tracker or experiencing an issue? Don't hesitate to reach out! Our dedicated support team is here to assist you every step of the way. Whether you require guidance on using a feature, encounter a technical issue, or simply want to share your feedback, we're just an email away.

Contact us anytime at **help@truesolv.com**, and we'll get back to you as soon as possible. Your satisfaction is our top priority, and we're committed to ensuring that you have a seamless experience with our time tracker.

Thank you for choosing True Time Tracker! We look forward to assisting you!

Warm regards,

TrueSolv team

TrueTimeTracker
by TrueSolv