Service Time Manager

Administrator Guide

Package Version 1.0

Last Updated 16th July 2020

Alscient

Contents

Introduction 3

Installation and Setup 4

User Instructions 6

Introduction

This package provides a simple tool for tracking time spent on Cases within Salesforce directly. This provides visibility on time spent on similar cases as well as the time individuals spend on cases.

Additionally, work can be scheduled on a case so the next steps to resolution are clear to all parties.

Installation and Setup

1. Click the 'Get It Now' button on the AppExchange listing

2. Log into the Salesforce account you wish to install the package in.

3. Choose who you would like to install the package for. If you choose to install the package for admins only, you will be able to grant other users access to the reports and dashboard later.

4. Wait to receive an email confirming that the package has been successfully installed.

5. Verify the package has installed as expected by navigating to Setup > Installed Packages.

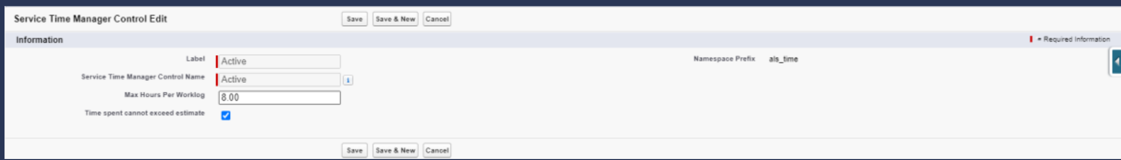
Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Service Time Manager	Alscient	1.0	als_time	02/07/2020, 15:26	✓	0	0	2	Not Passed

6. Navigate to Setup > Custom Metadata Types and select *Manage Records* on the *Service Time Manager Control* type.

Action	Label	Installed Package	Namespace Prefix	Visibility	Api Name	Record Size	Description
Manage Records	Service Time Manager Control	Service Time Manager	als_time	Public	als_time__Service_Time_Manager_Control__mdt	169	

7. Select Edit on the record named *Active*:
    a. Enter the maximum desired numbers hours allowed per worklog
    b. Set whether the total time in all Work Logs on a case should be allowed to exceed the estimated time on a Case.



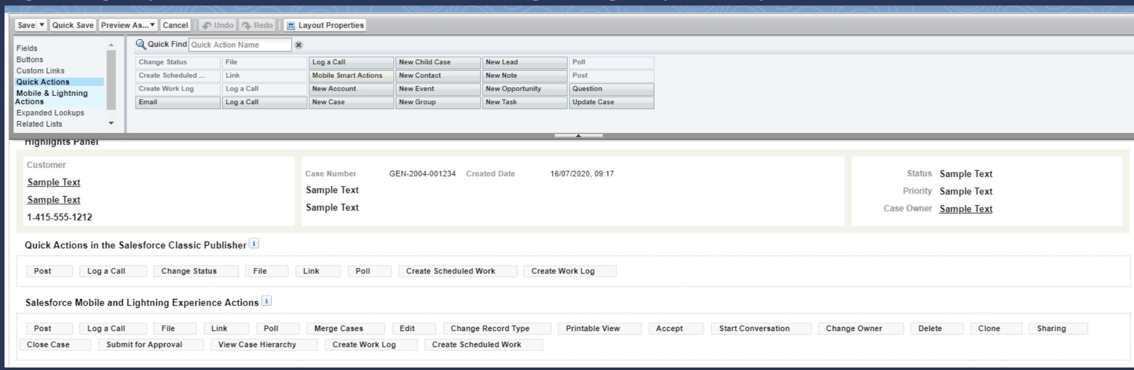
8. Add the Estimate to Complete (Hours) and Time Spent Fields to the desired Case Page layouts. Do so by navigating to Object Manager > Case > Case Page Layouts.

Estimate to Complete (Hours)	als_time__EstimatetoCompleteHours__c	Number(16, 2)
Time Spent	als_time__TimeSpent__c	Roll-Up Summary (SUM Work Log)

9. Add the *Create Scheduled Work* and *Create Work log* actions to the desired page layouts.

Create Scheduled Work	Create_Scheduled_Work	Create a Record	Action Layout Editor
Create Work Log	Create_Work_Log	Create a Record	Action Layout Editor

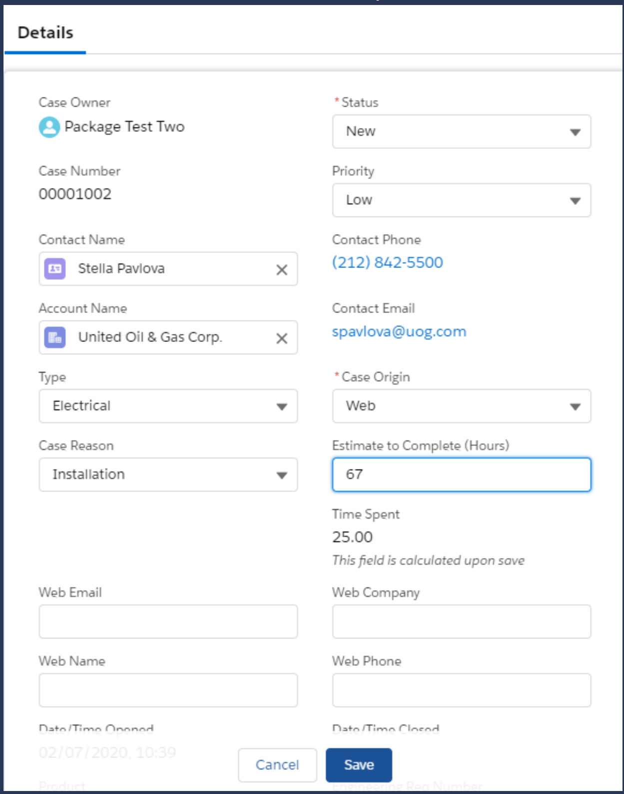
10. Add these to the *Quick Actions in the Salesforce Classic Publisher* or *Salesforce Mobile and Lightning Experience Actions* for Classic or Lightning respectively.



11. Ensure users intended to create Work Logs or Scheduled work have create permission on the relevant object and edit access on all fields. Note: users will need to be able to view Scheduled Work records should they need to add this to a Work Log record they are creating.

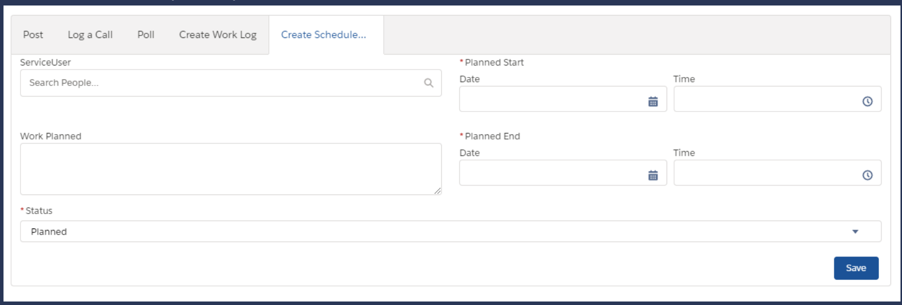
User Instructions

1. Set the estimated time for completion on a case.



Tip: consider automating this using a Flow or Process for standard Cases.

2. If desired, schedule work using the *Create Scheduled Work* Quick Action. These can be assigned to a resource (User) in the ServiceUser field.



3. Add work logs for completed work using the *Create Work Log* Quick Action, you can assign a Work Log record to a Scheduled Work record by populating the Schedule Work field.