Jpetto Project Manager

Salesforce Installation & User Guide

LEGENDARY
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Quick Info

App Details

Version Name: Jpetto Project Manager ver 1.7.0

First Release: 01/24/2025

Latest Release: 03/31//2025

Supported Features

Package Contents

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Custom Tabs: 8

Custom Apps: 2

Lightning Components

Global:

App Builder:

Community Builder:

Languages

English

Getting Started

- Jpetto is a native Salesforce app developed to help Salesforce partners, entrepreneurs and freelancers track and manage projects, project budget expenses, work items and timesheet entries.
- Jpetto enables users to leverage the platform's familiar interface, customization capabilities, and data integration.
- Jpetto provides a centralized, all-in-one project management solution that enhances productivity, collaboration, and cost-effectiveness.

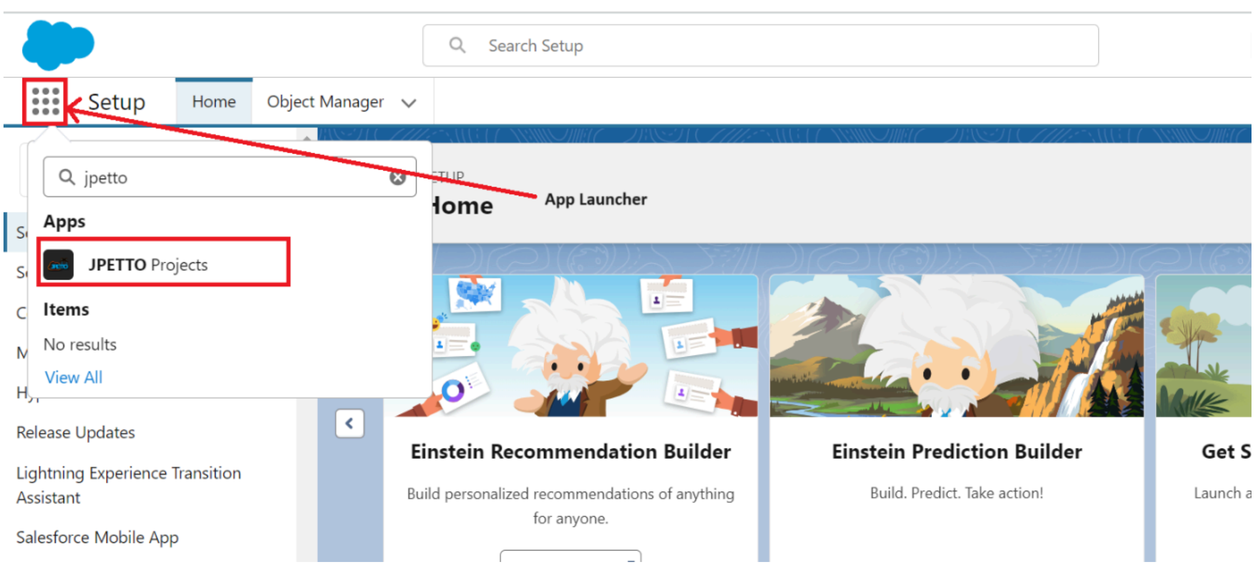
Product Overview

Jpetto is a comprehensive project management application built directly within the Salesforce platform. Key features include:

- Project Planning and Scheduling: Create project plans, set milestones, and assign tasks.
- Collaboration and Communication: Foster seamless collaboration through task comments, file sharing, and real-time messaging within the Salesforce environment.
- Task Management: Track progress, manage deadlines, and assign work items.
- Reporting and Analytics: Generate customizable reports and gain insights into project performance.
- Salesforce Integration: Jpetto fully integrates with Salesforce, leveraging data synchronization and custom object integration capabilities.
- Customization: Empower users to tailor Jpetto to their needs using Salesforce's robust customization options.
- Cost Savings: Consolidate multiple app licenses into a single Jpetto subscription, reducing monthly licensing costs.

Steps to access Jpetto

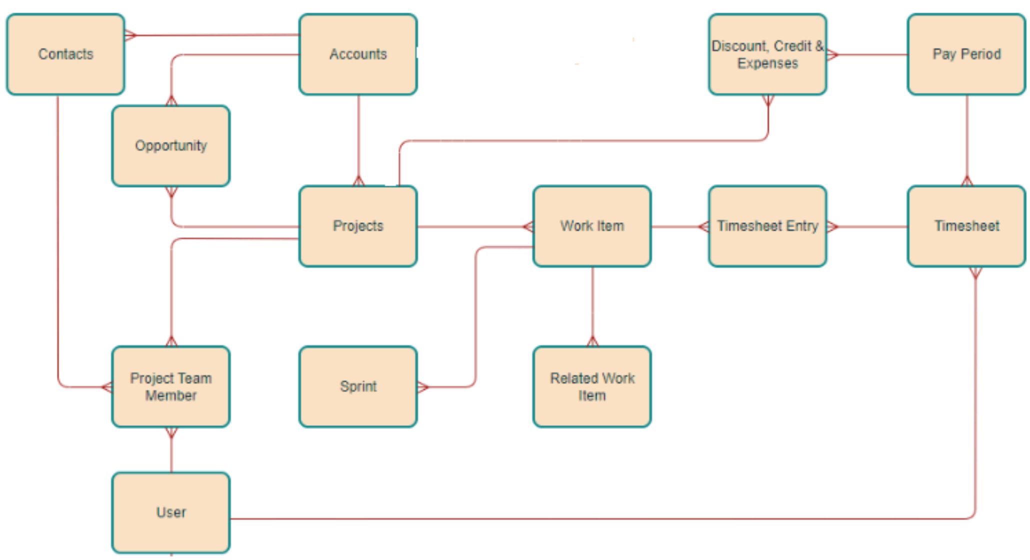
1. Install the Jpetto package into your Salesforce org.
2. Assign the Jpetto package licenses to the required users on Salesforce org.
3. Open App Launcher. In the search box, type **Jpetto** then click on the **Jpetto Projects** displayed as shown in the image below.



Supported Salesforce Objects

1. Account
2. Contact
3. Discount, Credit, or Expense
4. Error Log
5. Opportunity
6. Pay Period
7. Project
8. Project Team Member
9. Related Work Item
10. Sprint
11. Timesheet
12. Timesheet Entry
13. User
14. Work Item

Schema of Jpetto



Permission Set to work with Jpetto

To start working with Jpetto, you need to ensure that you have the necessary permissions to perform the basic operations. Additionally, if you want to implement and use new

Jpetto features, you may need to have additional permission sets granted. Please check below for the required permissions you will need to use Jpetto and its available capabilities.

Essential Permissions Sets to Work with Jpetto (Mandatory)

These permission sets are necessary to perform the most basic operations within the Jpetto product and access Jpetto's package metadata, such as objects, fields, pages, page layouts, etc. Without these permissions, you cannot use the Jpetto functionalities.

Permission Set	Package	Description	Target Users
Jpetto Full Access	Jpetto	This permission set grants full access to most of the essential functionalities of Jpetto. It grants ● CRUD permissions on all objects of Jpetto ● Access to all custom functionalities/components that depend on Jpetto objects.	Administrators, Project Managers and other users who need to manage accounts and projects.
Jpetto Minimum Access	Jpetto	This permission set grants access to core functionalities of Jpetto such as creating and editing of work items, timesheet entries and submitting timesheets for approval.	Developers, QA Testers, Business Analysts, any users need to work on requirements.

Additional Permission Sets for Jpetto Features (Optional)

In addition to the essential Jpetto functionalities, Jpetto offers additional features you may want to use. Please ensure you have the following permission sets assigned to use those features.

Permission Set	Package	Description	Target Users
Jpetto Finance Access	Jpetto	This permission is needed for users to get read and edit access for the finance-related fields of Jpetto objects.	Administrators, Project Managers, Finance Managers, Payroll Teams, etc..

Jpetto Objects & Fields

1. **Accounts (Standard Object)**
    - In Jpetto, all clients/partners are considered as accounts. Managing projects, work items and timesheet entries will start with an account object.
    - Account Record Fields: Below is the description of all the relevant fields in an account record.

      Details:
        - **Account Name:** Name of your client/partner company with whom you will work.
        - **Address:** Address of your client/partner organization.
        - **Active:** Select this checkbox if the client/partner project work is in progress.
        - **Fax:** Fax information of the client/partner organization.
        - **Industry:** You can select the sector your client/partner organization belongs (Consulting, Education, Health Care, etc.) in this field.
        - **Parent Account:** If any parent account is available for this account, please specify it in this field.
        - **Phone:** Phone of client/partner.
        - **Status:** Please specify the current status of the client/partner organization.
        - **Type:** You can select the type to which the client/partner organization belongs to.
        - **Website:** Website of the client/partner organization.
2. **Contact (Standard Object)**
    - All the users related to the account are added as contacts along with the organization's internal users, who are further used as project team members in individual projects.
    - Contact Record Fields: Below is the description of all the relevant fields in a contact record.

      Details:
        - **Account Name:** You can select the client/partner organization account the user belongs to in this field.
        - **Address:** Address of the users.

- **Department:** Mention the department to which the user belongs, in this field.
- **Email:** Add the email address of the user with whom to communicate.
- **First Name:** Holds the first name of the user.
- **Last Name:** Holds the last name of the user.
- **Level:** Specify the hierarchy of users in the client organization(primary, secondary, territory) to contact for requirements.
- **Mobile:** Add the user's mobile number.
- **Reports To:** In this field, you can select the contact user to whom the current user reports.
- **Title:** Mention the designation/title of the user here.

3. **Discount, Credit, or Expense (Custom Object)**
    - This object is used to maintain all the discounts, credits and expenses records of each project, which are further used to calculate the project finances such as budget, expenses, revenue and profit.
    - Discount Record Fields: Below is the description of all the relevant fields in a Discount, Credit, or Expense record.

      Details:
        - **Amount:** This field holds the amount value of the discount record.
        - **Expense Name:** Generated auto number for the new Discount, Credit, or Expense record created.
        - **Pay Period:** This field represents the pay period to which this Discount, Credit, or Expense record is related.
        - **Project:** From this field, you can navigate directly to the project record for this Discount, Credit, or Expense record.
        - **Record Type:** In this field, please specify the record type of the Discount, Credit, or Expense record.
        - **Title:** Name given to your Discount, Credit, or Expense record.
4. **Error Log (Custom Object)**
    - This object is used to capture the run-time exceptions of the apex classes and triggers.
    - Error Log Record Fields: Below is the description of all the relevant fields in an Error Log record.

      Details:

        - **Details:** This field stores the error description of the exception occurring in the apex classes/triggers at run-time.
        - **Error Log Name:** Generated auto number for the new Error Log record created.

5. **Opportunity (Standard Object)**
    - This object is used to represent the opportunity records of the accounts.
    - Opportunity Record Fields: Below is the description of all the relevant fields in an Opportunity record.

      Details:
        - **Account Name:** This field represents the account to which the opportunity record belongs.
        - **Close Date:** The date when the opportunity will be closed.
        - **Description:** In this field, please provide a description of the opportunity.
        - **Opportunity Name:** Name of the opportunity.
        - **Stage:** You can select the current stage of the opportunity.

6. **Pay Period (Custom Object)**
    - This object is used to create recurring time records over which employee time is recorded and paid.
    - Pay Period Record Fields: Below is the description of all the relevant fields in a Pay Period record.

      Details:
        - **End Date:** This field displays the end date of the period of the pay period record created.
        - **Pay Period Name:** Generated auto number for the new Pay Period record created.
        - **Start Date:** This field displays the start date of the time period of pay period record created.

7. **Project (Custom Object)**
    - Based on the budget-type, client requirements are created as projects in Jpetto Devops. Processing of client requirements starts with Projects.
    - Project Record Fields: Below is the description of all the relevant fields in a Project record.

      Details:
        - **Actual Go-Live Date:** The date when the project goes live.

- **Anticipated Go-Live Date:** The date when the project is expected to go live.
- **Billable Hours (Current Month):** This field stores the total number of billable hours logged on the project for the current month.
- **Billable Hours (Last Month):** This field stores the total number of billable hours logged on the project in the previous month.
- **Billing Cycle:** In this field, please specify the billing cycle that the project falls under.
- **Budget Type:** Select the budget type used for project billing.
- **Budgeted Hours (per period):** This field stores the number of budgeted hours allotted per period(Monthly, Bi-Weekly, Milestone, etc) for the project.
- **Budgeted Hours (total):** This field stores the total budgeted hours allotted for the project.
- **Budgeted Hours Consumed (Total Billable):** This field displays the total number of billable budgeted hours consumed on the project to date.
- **Budgeted Hours Consumed (Total):** This field displays the total number of budgeted hours(billable+non-billable) consumed on the project till date.
- **Client Account:** From this field, you can navigate directly to the account record of this project record.
- **Hours Remaining in Budget (Total):** This field displays the number of hours left in the project budgeted hours.
- **Kick-off Date:** The official date upon which the Project begins.
- **Project Name:** Name given to your project.
- **Project Overview:** Description to add details/requirements of the project.
- **Record Type:** In this field, please specify the record type of the Project.
- **Service Rate:** This field shows the rate of service at which the client is billed.
- **Status:** Please specify the current status of the project.
- **Total Discounts, Credits, and Expenses:** This field shows the total amount spent on the project as discount, credit and expenses.

8. **Project Team Member (Custom Object)**
   - All the users/contacts, both internal and external working on the project are added as Project Team Members.

- Project Team Members Record Fields: Below is the description of all the relevant fields in a Project Team Member record.
  Details:
    - **Active:** Select this checkbox if the user is active as a team member.
    - **Email:** This field holds the email address of the team member.
    - **External Team Member:** In this field, please specify the contact record of the project team member.
    - **External User:** Select this checkbox if the team member added belongs to the client/partner organization.
    - **Internal Team Member:** In this field, please specify the project team member's user record.
    - **Project:** From this field, you can navigate directly to the project record of this project team member.
    - **Project Team Name:** Generated auto number for the new Project Team Member record created.
    - **Role:** You can select the role of the project team member in this field. It can be developer or tester or manager.

9. **Related Work Item (Custom Object)**
    - This object is used to represent the child objects of the parent Work Item created under the projects.
    - Related Work Item Record Fields: Below is the description of all the relevant fields in a Related Work Item record.
      Details:
        - **Primary Work Item:** In this field, please specify the primary parent work item to which the child work item belongs.
        - **Related Work Item Name:** Generated auto number for the new Related Work Item record created.
        - **Secondary Work Item:** In this field, please specify the secondary parent work item to which the child work item belongs.
        - **Type:** Select the type of child work item created here.

10. **Sprint (Custom Object)**
    - sprint is a set period of time during which specific work has to be completed and made ready for review

- Sprint Record Fields: Below you will find the description of all the relevant fields in a Sprint record.

  Details:

  - **Client Account:** In this field, please specify the client account to which the sprint belongs.
  - **End Date:** Date when the sprint should be completed.
  - **Project:** This field specifies the project to which the sprint belongs.
  - **Sprint Duration:** Period of time allotted to complete the sprint work.
  - **Sprint Name:** Name given to the sprint.
  - **Sprint Outline:** A description field to add details about the sprint.
  - **Start Date:** Date when the sprint starts.
  - **Status:** This field shows the status of the sprint.
  - **Type:** This field shows the type (QA, development,etc…) of the sprint.

11. Timesheet (Custom Object)

- This object helps to bind the users in the org with pay periods, which are further used to check time logged on the work items.
- Timesheet Record Fields: Below is the description of all the relevant fields in a Timesheet record.

  Details:

  - **Active:** Select this checkbox if the timesheet is active now.
  - **End Date:** End date of the timesheet.
  - **Hours Logged (Billable):** This field stores the total number of billable hours the user logs within this timesheet duration.
  - **Hours Logged (Total):** This field stores the total number of hours (Billable + Non-Billable) the user logs within this timesheet duration.
  - **Normalized Rate of Pay:** This field shows average hourly rate of user logged hours.
  - **Pay Period:** This field specifies the pay period the timesheet is tied to.
  - **Period:** This field displays the pay period duration.
  - **Previous Status:** This field shows the last status of the timesheet.
  - **Start Date:** Start date of the timesheet.
  - **Status:** This field shows the status of the timesheet.
  - **Submission Comments:** Stores the comments added by the user to the timesheet while submitting it for approval.

- **Timesheet Name:** Generated auto number for the new Timesheet record created.
- **Total Cost:** This shows the total cost for the hours the user logged on the timesheet.
- **User:** In this field, please specify the user to whom this timesheet belongs.
- **User Id:** This field shows the user Id of the user that the timesheet belongs.

12. Timesheet Entry (Custom Object)

- This object helps the users to log no.of hours they worked on work items each day.
- Timesheet Entry Record Fields: Below is the description of all the relevant fields in a Timesheet Entry record.

  Details:

  - **Add Hours to Roll-Up:** This checkbox is used to run automations by apex in the backend.
  - **Billable Amount:** This field holds the billable amount.
  - **Billable to Client:** When this checkbox is enabled, if the timesheet entry hours are client billable.
  - **Budget Status:** This field shows the budget status of the entries.
  - **Client Account:** This field helps to check to which account the timesheet entry belongs.
  - **Cost of Labor:** The labor rate for the user hours logged in the timesheet entry.
  - **Date Approved:** Holds the timesheet entry approved date after user approver approval.
  - **Date Submitted:** Holds the date the timesheet entry is submitted for approval by the user.
  - **Date Worked:** Date when the user worked on the work item.
  - **Day worked:** The day the user worked on the work item.
  - **Description:** A text field provided to add the details about the work done on the work item for logged hours.
  - **Hours:** Hours the user spent on the work item for the day.

- **Leave Approval Status:** From this field, you can check the status of leaves sent for approval.
- **Non-Billable Reason:** In this field, you can specify the reason for logging non-billable hours.
- **Project:** This field helps to check to which project the timesheet entry belongs.
- **Project Id:** This field shows the ID of the project attached to the timesheet entry.
- **Rate:** Service rate for the hours of the timesheet entry project.
- **Status:** This field shows the status of the timesheet.
- **Timesheet:** From this field, you can navigate directly to the timesheet of this timesheet entry record.
- **Timesheet Entry Name:** Generated auto number for the new Timesheet record created.
- **Type:** In this field, you can specify the type of work(Admin, development, audit, etc) the user has done on the work item for the logged hours.
- **User:** In this field, please specify the user to whom this timesheet entry belongs.
- **User Id:** This field shows the ID of the user attached to the timesheet entry.
- **Work Item:** This field refers to the work item, you are logging hours.

13. User (Standard Object)

- Employees are created as users in the organization.
- User Record Fields: Below is the description of all the relevant fields in an User record.

  Details:

  - **Auto-Generate Timesheets:** Select this checkbox to create timesheets for the user with scheduled batch class.
  - **Availability:** In this field, please specify the total number of hours the user is available for work.
  - **Bereavement Hours:** In this field, please specify the total number of bereavement hours assigned for users per year.
  - **Bereavement Leave:** This field holds the no.of bereavement leaves the user has used till date.

- **Billable Rate:** Used to specify the billable rate of the user.
- **Date of Hire:** The date when the user was hired.
- **Email:** Holds the user's email address.
- **Employment Type:** This field is used to specify the type of user employment.
- **Floating Holiday:** In this field, please specify the total number of floating holidays granted to users per year.
- **First Name:** Holds the first name of the user.
- **Last Name:** Holds the last name of the user.
- **Maternity/Paternity Hours:** In this field, please specify the total number of maternity/paternity hours assigned for users per year.
- **Paid Leave:** In this field, please specify the total number of paid leaves granted to users per year.
- **Rate of Pay:** In this field, please specify the user's per hour cost.
- **Sick Leave Hours:** In this field, please specify the total number of sick leave hours assigned for users per year.
- **Staffing Source:** Used to specify the source of the user recruitment.
- **Total Hours Worked:** This field specifies the total number of hours a user has worked till date.
- **Unpaid Leave:** In this field, please specify the total number of unpaid leaves allotted for users per year.
- **User Name:** This field is used to add the username of the user.
- **Vacation Hours:** In this field, please specify the total number of vacation hours assigned for users per year.

14. Work Item (Custom Object)

- Project requirements are split into small tasks called work items based on the type of work to be done.
- Work Item Record Fields: Below is the description of all the relevant fields in a Work Item record.

  <u>Details:</u>

  - **Assigned Contact:** In this field, used to assign the work item to the community/portal users(contact) to work.
  - **Assigned User:** In this field, specify the user to whom this work item is assigned to work.

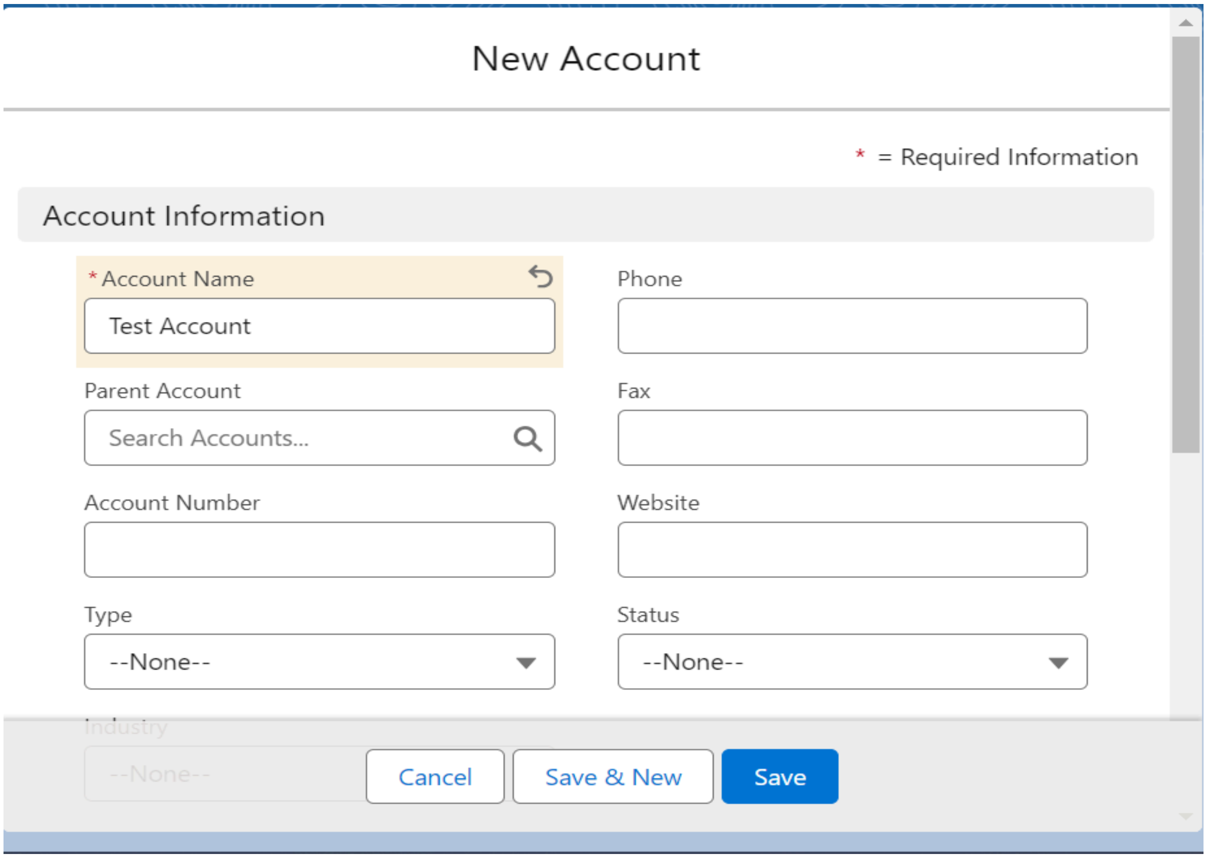
- **Billable Hours (Current Month):** This field stores the total number of billable hours logged on the work item for the current month.
- **Billable Hours (Current Week):** This field stores the total number of billable hours logged on the work item for the current week.
- **Billable Hours (Last Month):** This field stores the total number of billable hours logged on the work item in the previous month.
- **Billable Hours (Last Week):** This field stores the total number of billable hours logged on the work item for the last week.
- **Client Account:** This field specifies to which client account the work item belongs.
- **Delivery Date:** The official date, the work item is delivered to the client.
- **Description:** Text field to add a description of the work item.
- **Due Date:** Date, the work item is completed and ready for delivery.
- **Estimated Hours:** Shows the estimated hours for completion of work items.
- **Hours (Estimated to Actual):** This field shows the percentage of hours consumed on the work item.
- **Hours Logged (Billable):** This field displays the total number of billable hours consumed till date on the work item.
- **Hours Logged to Work Item (Total):** This field displays the total number of hours(billable+non-billable) consumed till date on the work item.
- **Hours Remaining in Project Budget:** This field displays the number of hours left in the project budgeted hours.
- **Hours Remaining in Work Item Budget:** This field displays the number of hours left in the work item budgeted hours.
- **My Work Item:** This field is true when the current logged in user and Assigned User are the same.
- **Non-Billable Hours (Current Month):** This field stores the total number of non-billable hours logged on the work item for the current month.
- **Non-Billable Hours (Current Week):** This field stores the total number of non-billable hours logged on the work item for the current week.
- **Non-Billable Hours (Last Month):** This field stores the total number of non-billable hours logged on the work item in the previous month.

- **Non-Billable Hours (Last Week):** This field stores the total number of non-billable hours logged on the work item last week.
- **Parent Work Item:** Use this field to specify the parent work item related to the current work item, if applicable.
- **Priority:** Used to specify the priority of the work item.
- **Project:** From this field, you can navigate directly to the project record of this work item record.
- **Record Type:** In this field, please specify the record type of the Work Item record.
- **Severity:** Used to specify the severity of the work item.
- **Sprint:** In this field, please specify the sprint to which the work item belongs.
- **Status:** Please specify the current status of the work item.
- **Steps to Reproduce:** A description field in the work item to add steps to reproduce the bug raised in the org.
- **Title:** Name given to the work item.
- **Work Item Name:** Generated auto number for the new Work Item record created.
- **Work Item Type:** This field is used to select the work item type.

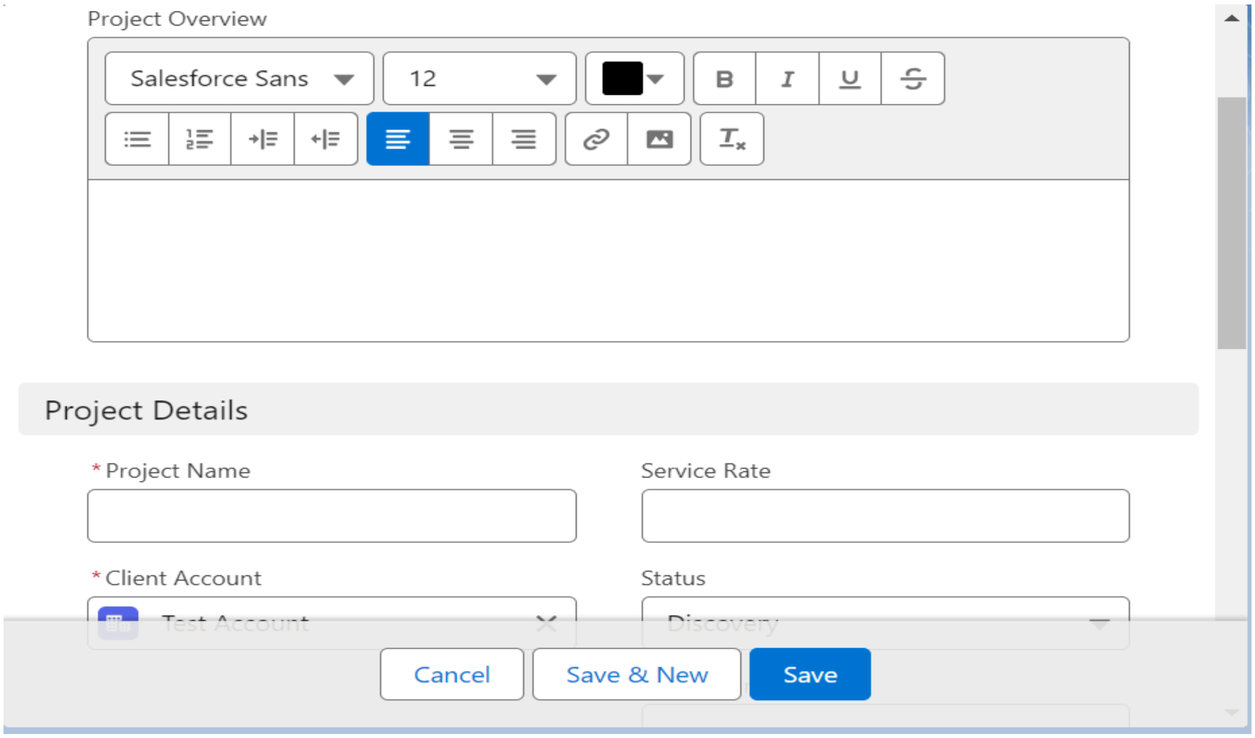
Creation of records in Jpetto

1. **Creating an Account**

   To create an account, click the New button on the list view of the Account tab. Enter the applicable fields and click save.

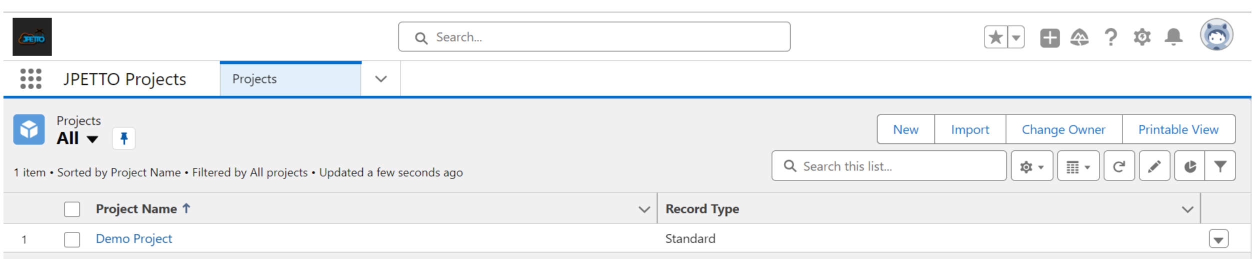


2. **Creating a Project**
   a. **From Accounts Related list:**
   - To Create a Project, click the **New** button on the Projects tab of the Related list on the Account record to which you want the project to relate.
   - Select the appropriate record type of the project on the following screen.
   - Enter the applicable fields and save the project.



b. From New button on project tab:

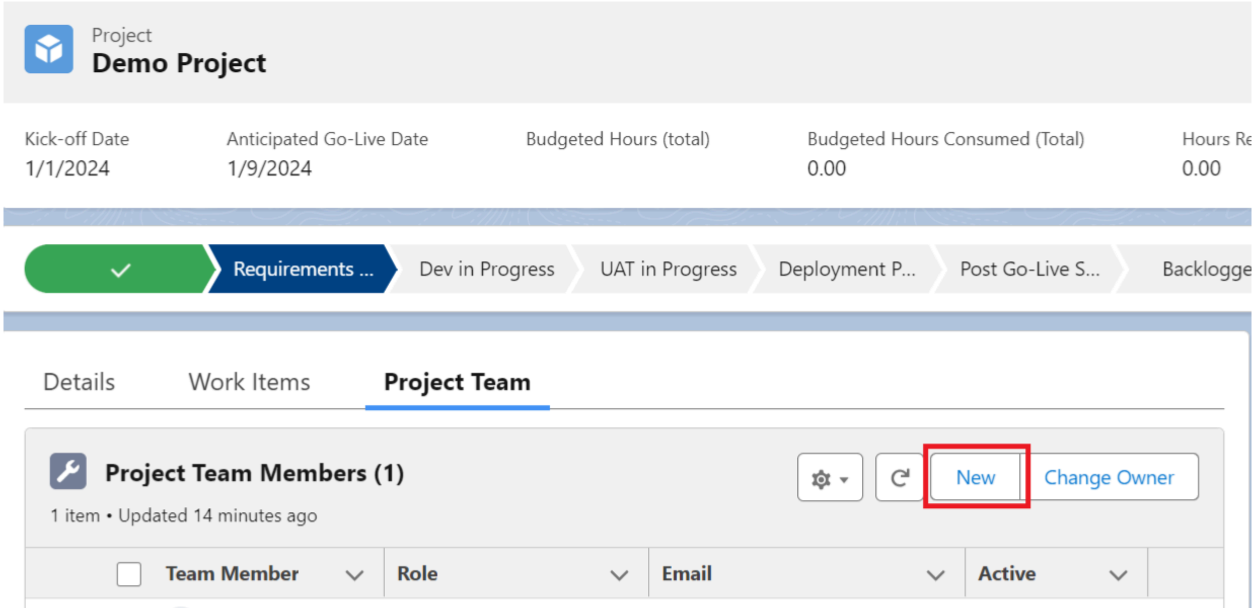
- Alternatively, you can create a new project by clicking the New button on the list view of the project tab.
- Select the appropriate record type of the project on the following screen.
- Enter the applicable details and click save.



3. Creating a Project Team Member

a. From Project Team Tab:

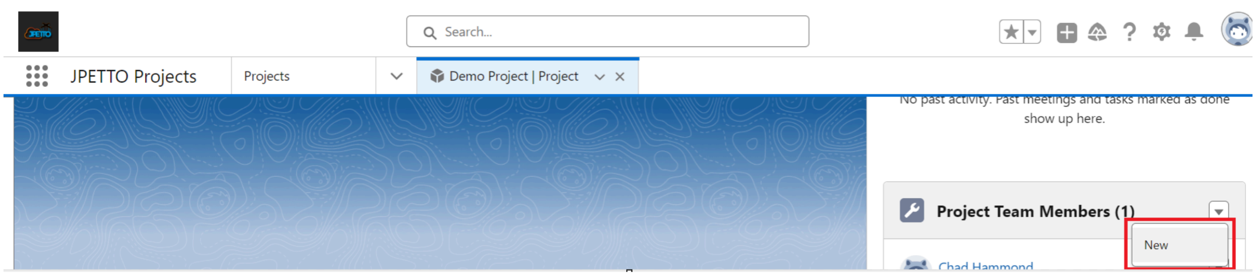
- To Create a Project Team Member, on the 'Project Team' tab click the New button on the Project Team Members of Related list on the Project record you want the Project Team Member to relate to.



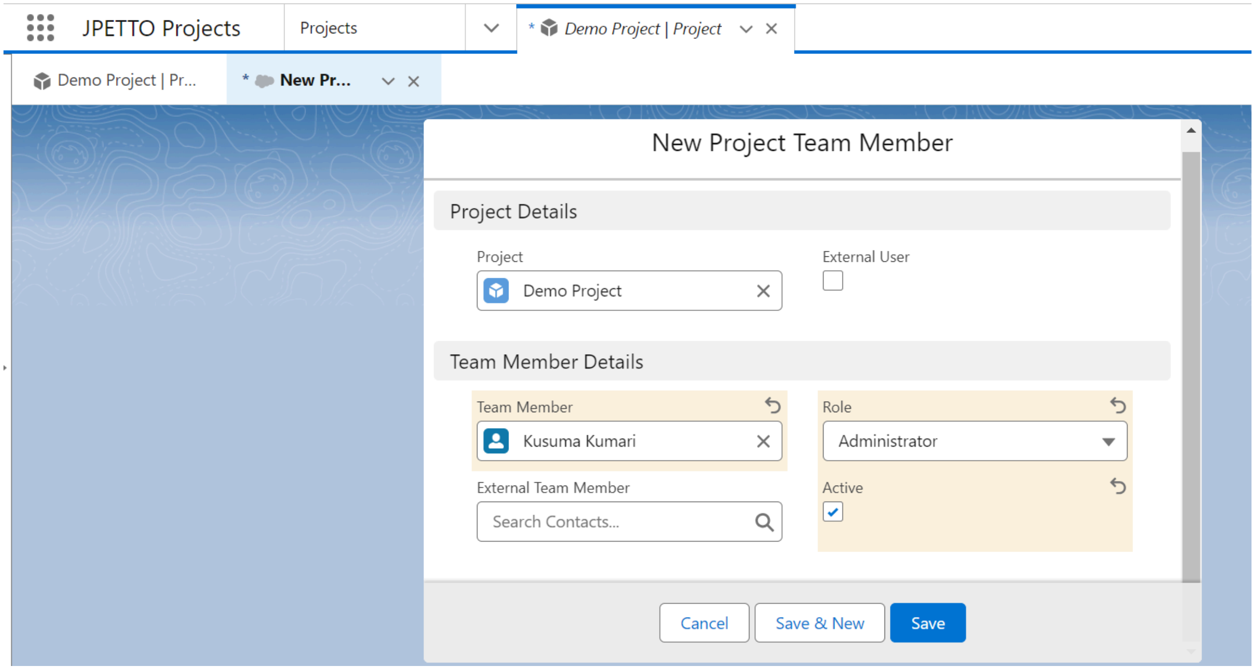
- Enter the applicable fields and save the Project team Member.

b. From Project Related List:

- To Create a Project Team Member, click the New button on the Project Team Members of Related list on the Project record you want the Project Team Member to relate to.



- Enter the applicable fields and save the Project Team Member.

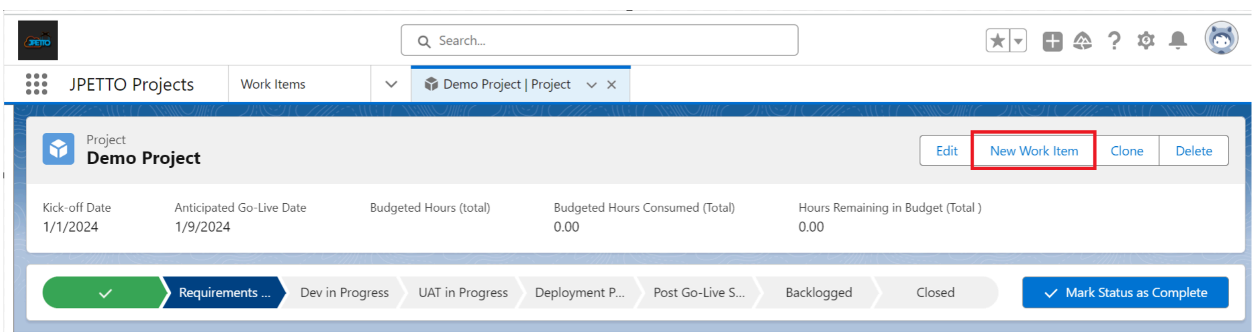


4. Creating a Work Item

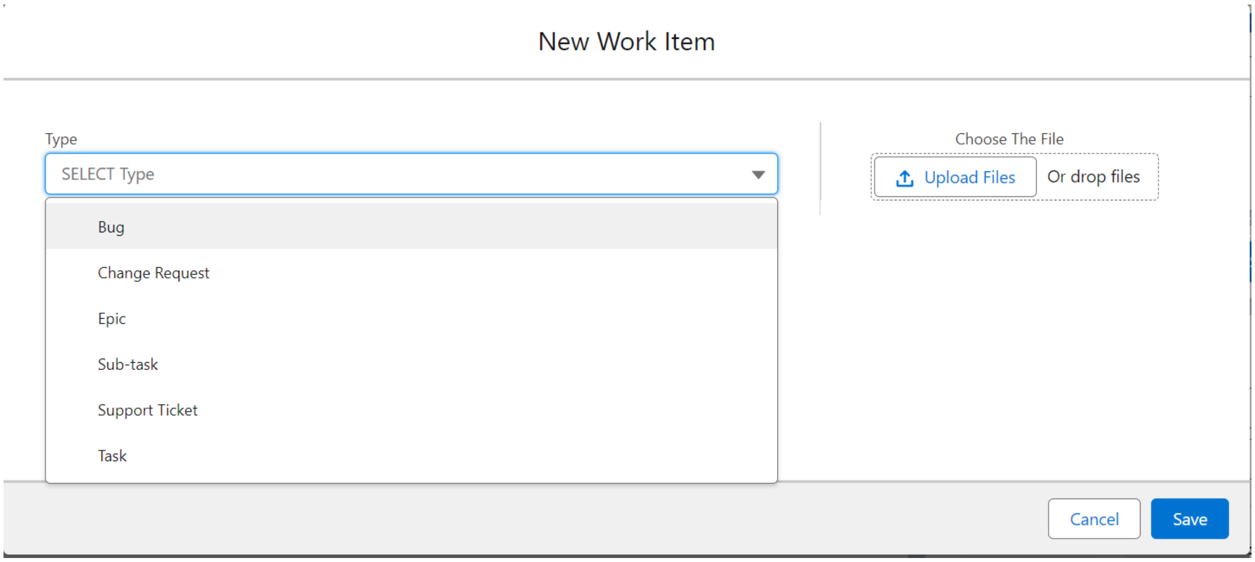
Note: To assign user to Work Item while creating, add assignee user as Project Team Member to the respective project as mentioned [here](#).

a. From Project Quick Action Button:

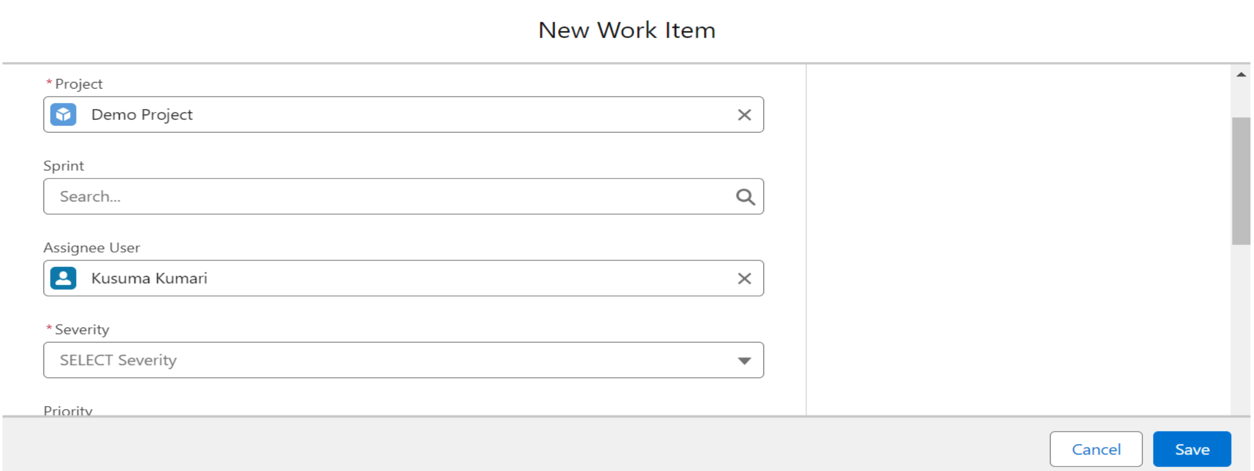
- To create a Work Item, click on the **New Work Item** button on the Project Record page of the project record to which you want the Work Item to relate.



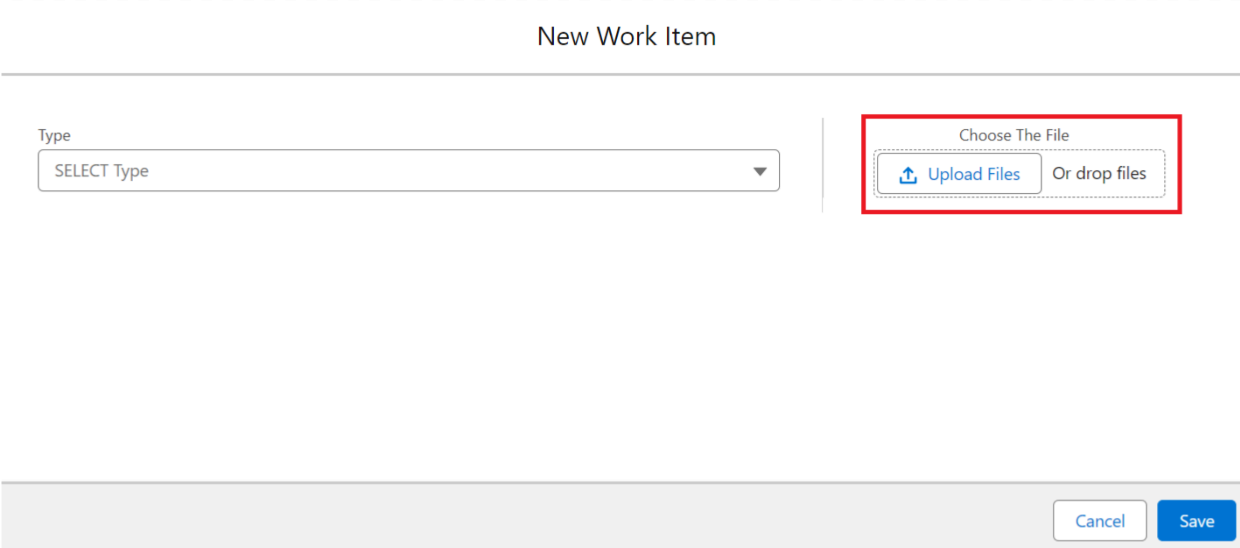
- Select the appropriate record type of the Work Item on the following screen.



- Enter the applicable fields and save the Work Item.

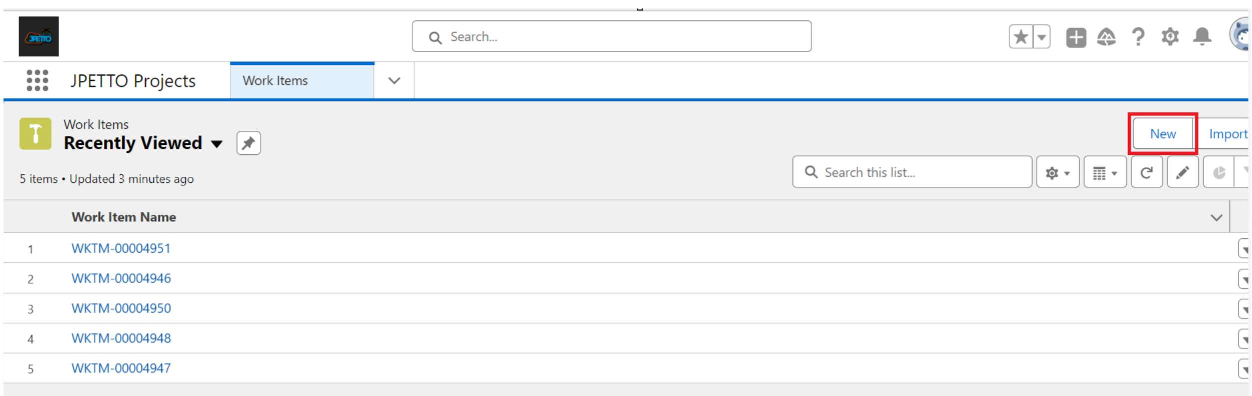


- Supporting files can be uploaded using the **Upload Files or Drop Files** button while creating the work item with this quick action button.



b. From New button on Work Item tab:

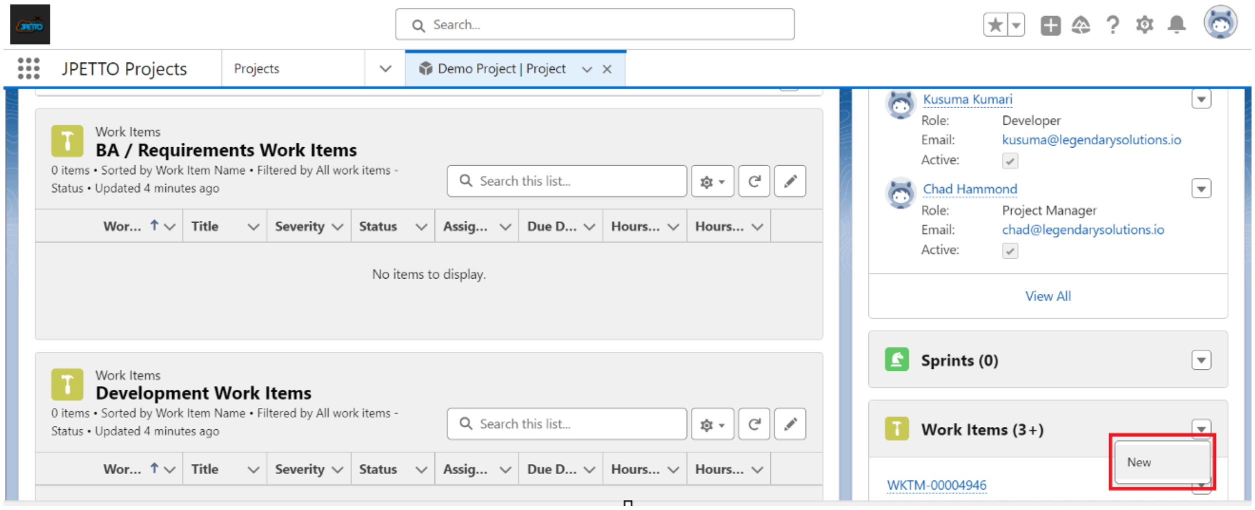
- Alternatively, you can create a new work item by clicking the New button on the list view of the work item tab.



- Select the appropriate record type of the work item on the following screen.
- Enter the applicable details and click save.

c. From Project Related list:

- To Create a Work Item, click a New button on the Work Items tab of Related list on the Project record you want the work item to relate to.

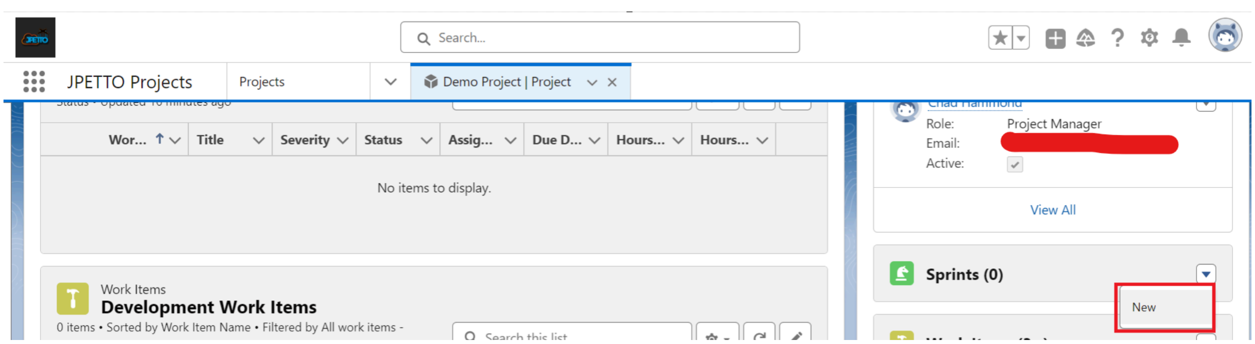


- Select the appropriate record type of the work item on the following screen.
- Enter the applicable fields and save the work item.

5. Creating a Sprint

a. From Project Related list:

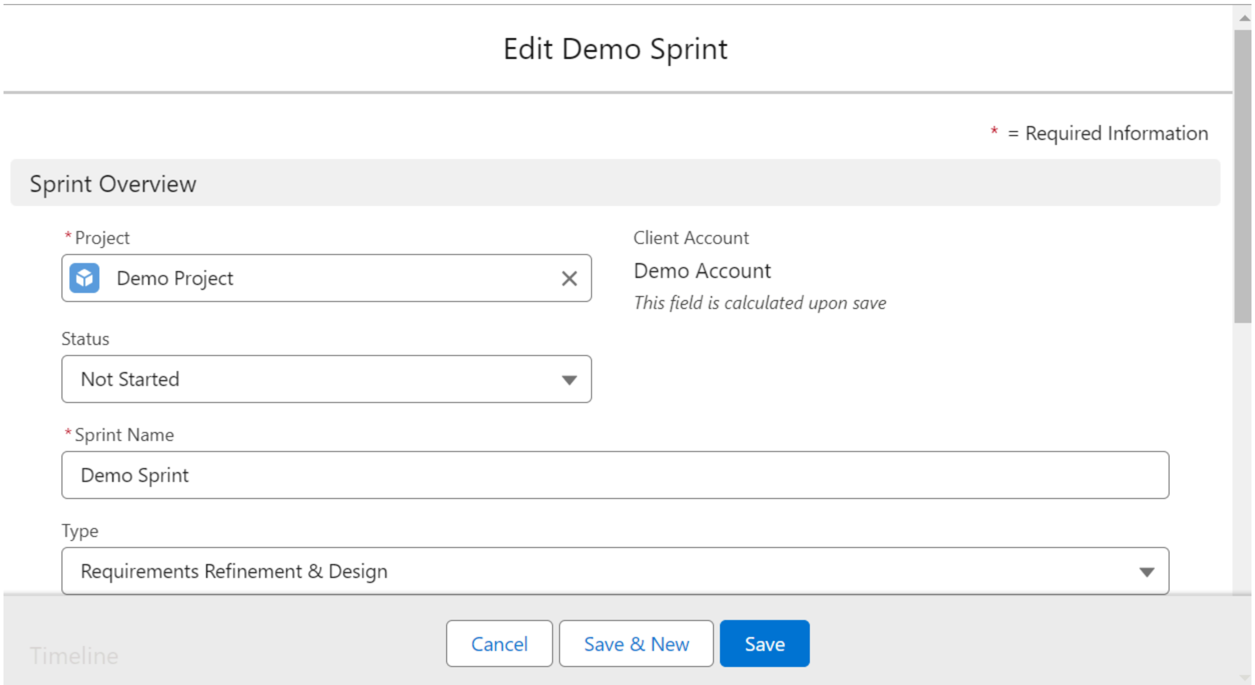
- To create a Sprint, click the New button on the Sprint tab of the Related list on the Project record to which you want the sprint to relate.



- Enter the applicable fields and click save.

b. From New button on Sprint tab:

- Alternatively, you can create a new sprint by clicking the New button on the list view of the sprint tab.
- Enter the applicable fields and click save.

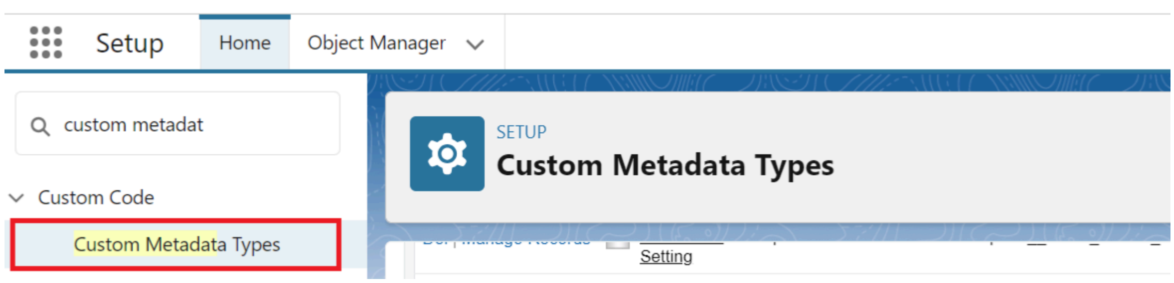


6. Creating a Pay Period

- Before scheduling, system admin can create the initial pay period by running the first batch manually in an anonymous window, as mentioned [here](#).
- The creation of pay period records is handled by the batch class in Jpetto. To enable the process, the admin has to schedule the respective batch class and update the custom metadata records as shown below.

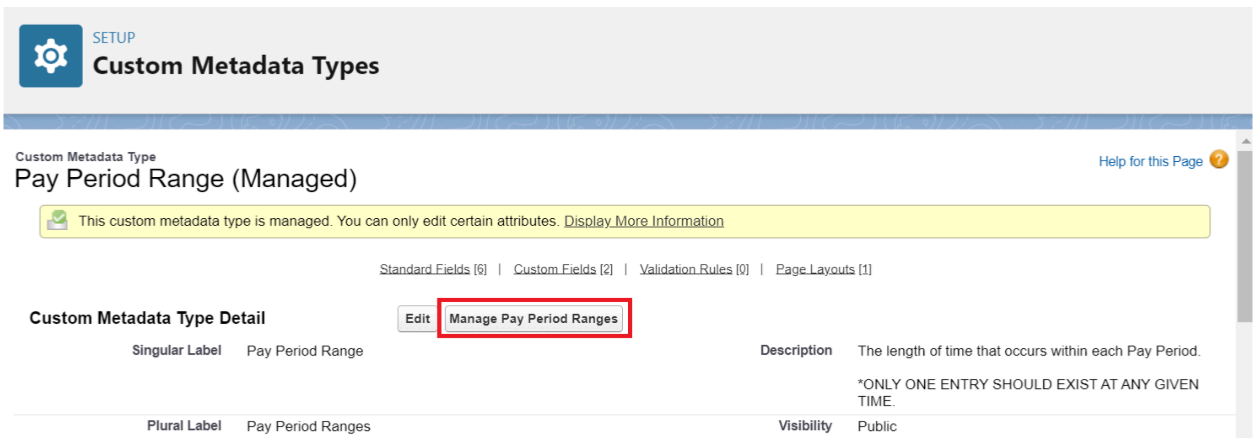
  Update Custom Metadata Record:

  - From the **Setup**, in the search box, type custom metadata and then select the **Custom Metadata Types** from the list below the search box as shown in Fig.



  - Select the **Pay Period Range** custom metadata type from the list.

- Click on the **Manage Pay Period Ranges** button.



- Select the **Default** record from the list and click on the **Edit** button to update the record.
- Update the **Range Type** and **Range Duration** fields of the record as per the organization's requirements. These fields are further used while creating the pay period record when batch class is scheduled.

  Range Type: Specify the frequency (Daily, Weekly, Monthly) of pay period to be created for every scheduled batch run.

  Note: Schedule the batch class on 1st or 16th of every month if **Range Type** is selected as 'Half Month' (Half Month is useful to create semi-monthly pay period records one for 1-15th and another for 16-last day of month as per schedule).

  Range Duration: Used to define the time interval for the selected **Range Type**.

Scenario: If an organization admins/project managers want to check the hours logged by the employees weekly instead of finding the hours from the long list.

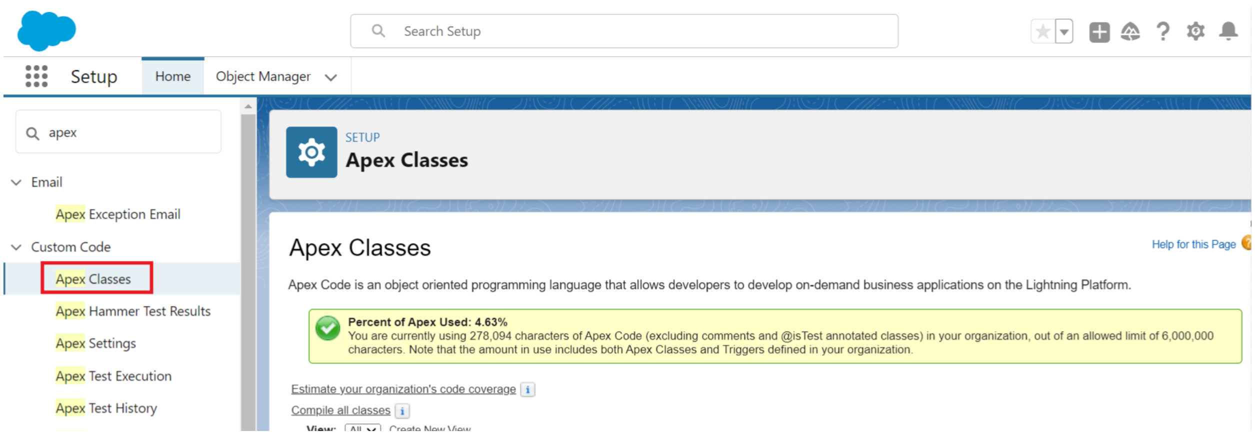
Solution: To solve the above problem, the organization admin has to update the “Default” record of the “Pay Period Range” custom metadata type object as below:

Range Type: Weekly

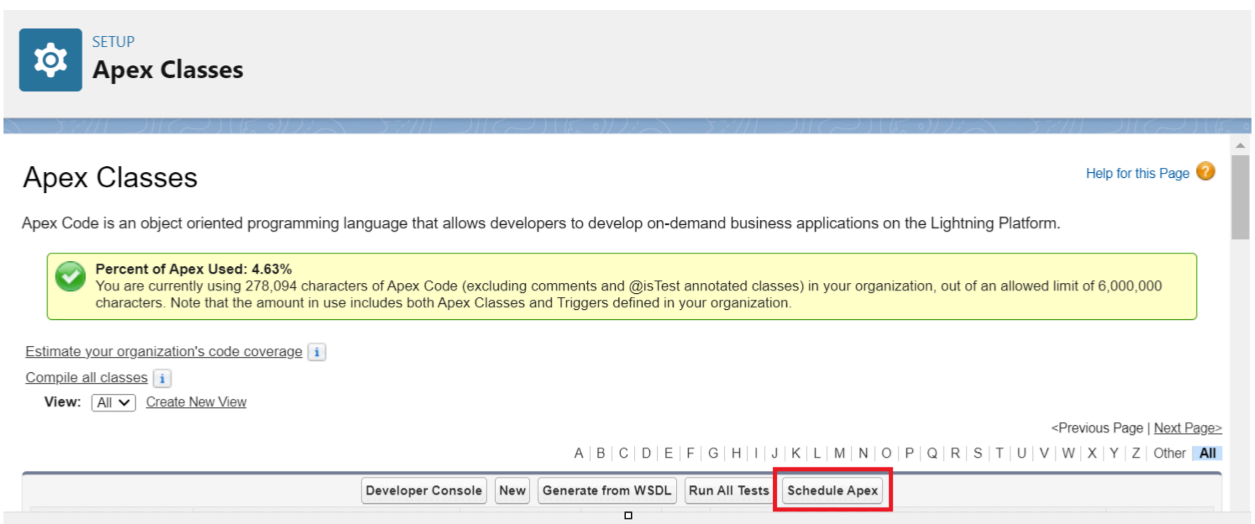
Range Duration: 1

Schedule the Batch Class:

- From the **Setup**, in the search box, type Apex Classes and then select the **Apex Classes** from the list below the search box as shown in fig.



- Click on the **Schedule Apex** button.



Step 1: Enter your preferred name to the schedule.

Step 2: Select the “PayPeriodBatchScheduler” apex class on the Apex Class lookup field.

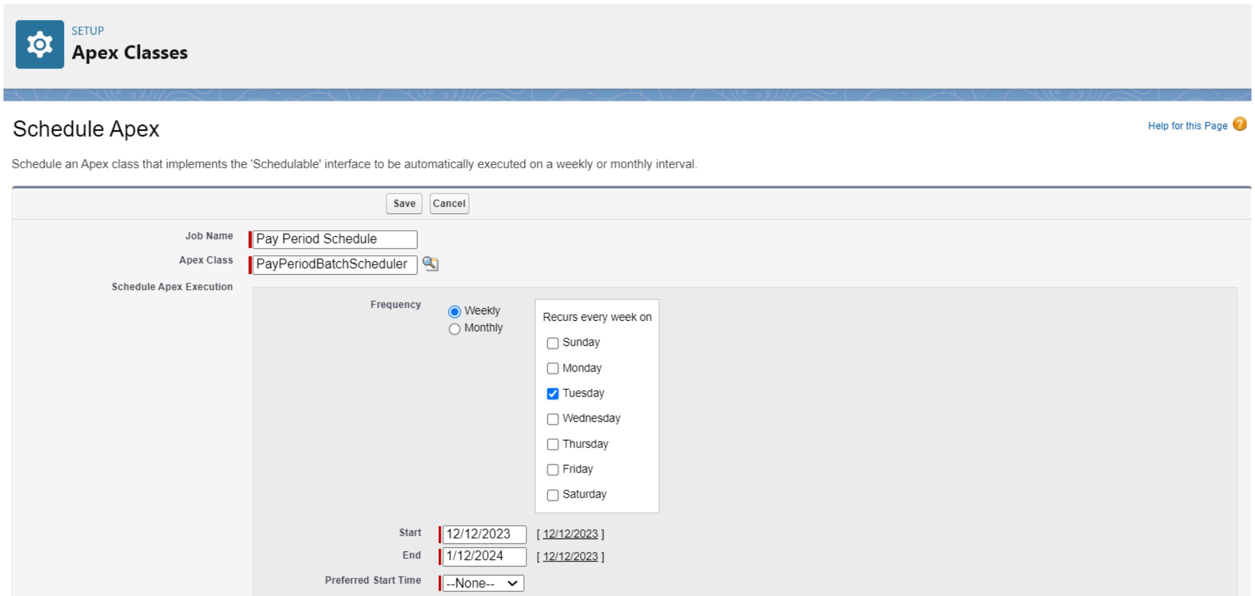
Step 3: Select frequency as Weekly or Monthly as per your preference.

Step 4: If the frequency is 'Weekly' then specify the **Recurs every week on** to run the batch.

Step 5: Specify the Start Date and End Date of the schedule.

Step 6: Select the preferred time of the schedule.

Step 7: Click 'Save'.



Scenario: If an organization's admins/project managers want to check the hours logged by the employees weekly instead of finding the hours from the long list, the week should start on Monday and end on Sunday.

Solution: To solve the above problem, the organization admin has to update the "Default" record of the "Pay Period Range" custom metadata type object as below:

Range Type: Weekly

Range Duration: 1,

While scheduling the batch class, select the below values:

Frequency: Weekly

Recurs every week on: Monday

7. Creating a Timesheet

- Timesheet records are created for all active users whose **Auto Generate Timesheets** checkbox is true.
- Before scheduling, system admin can create the initial timesheets by running the first batch manually in an anonymous window, as mentioned [here](#).

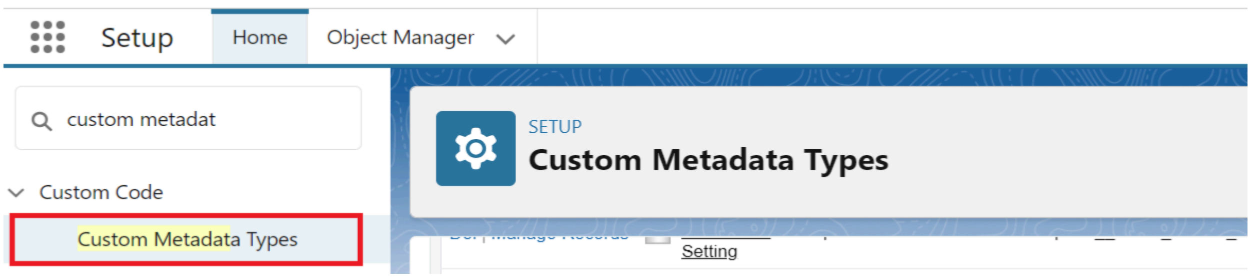
- The creation of Timesheet records is handled by the batch class in Jpetto. To enable the process, the admin has to schedule the respective batch class and update the custom metadata record as shown below.

  <u>Update/Create Custom Metadata Record:</u>

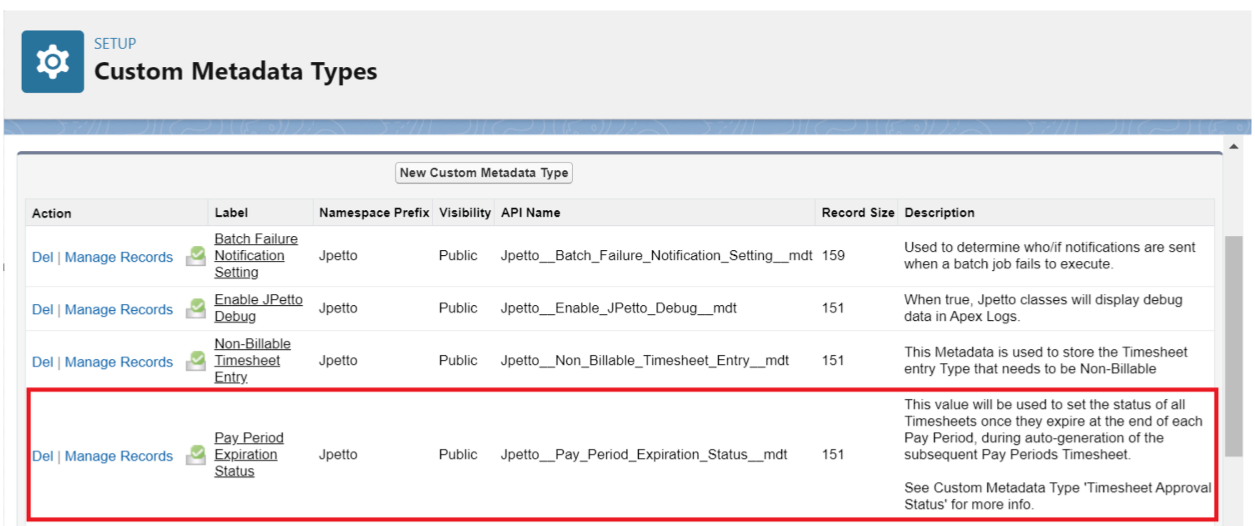
  - Before scheduling the timesheet batch class, the admin needs to update/create two custom metadata types.
    1. Pay Period Expiration Status
    2. Timesheet Approval Status

  <u>Update Pay Period Expiration Status Record:</u>

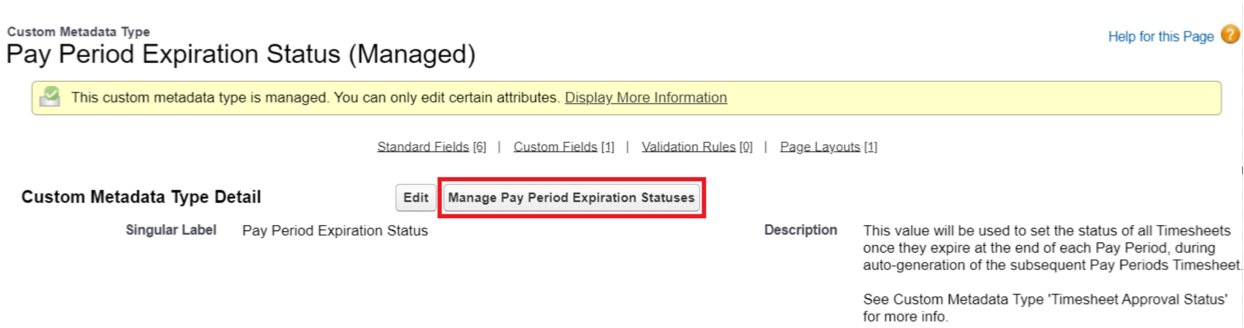
  - From the **Setup**, in the search box, type custom metadata and then select the **Custom Metadata Types** from the list below the search box as shown in fig.



  - Select the **Pay Period Expiration Status** custom metadata type from the list.



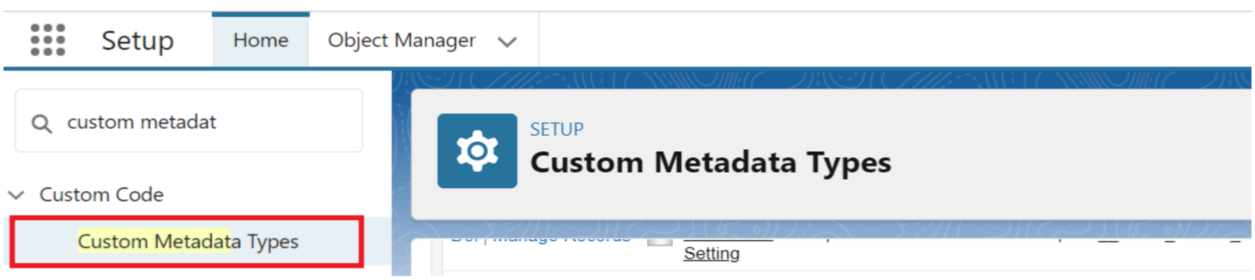
  - Click on the **Manage Pay Period Expiration Statuses** button.



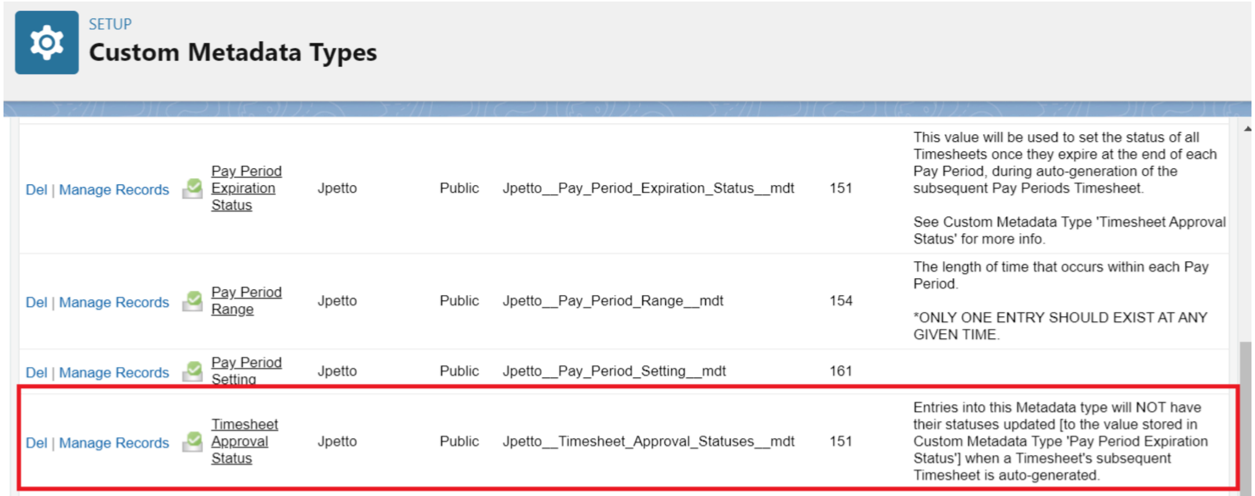
- Select the **DefaultStatus** record from the list and click the **Edit** button to update the record.
- Update the **Status** fields of the record as per the organization requirements. This is further used to update the status of previous pay period timesheets while creating the new pay period timesheet records when a batch class is scheduled. **Status:** This field holds the value that will be used to set the status of all Timesheets once they expire at the end of each Pay Period, during auto-generation of the subsequent Pay Period Timesheets.

Create Timesheet Approval Status Records:

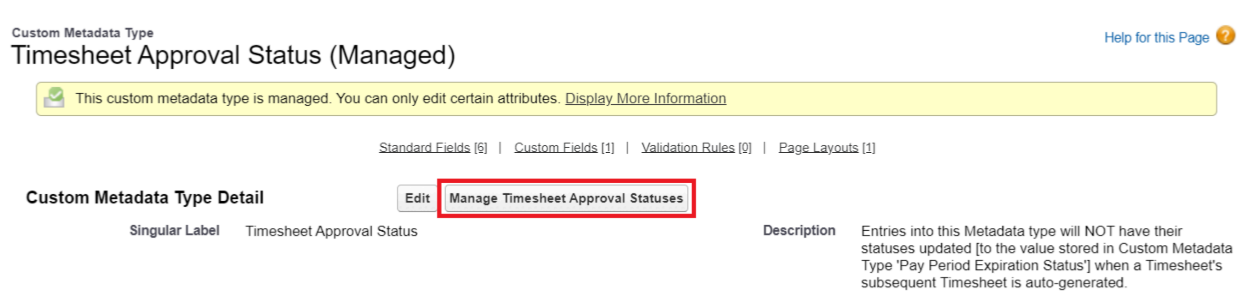
- From the **Setup**, in the search box, type custom metadata and then select the **Custom Metadata Types** from the list below the search box as shown in fig.



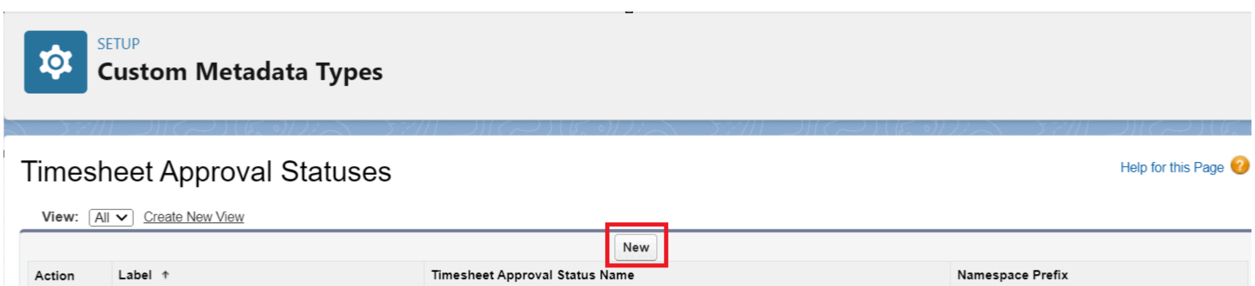
- Select the **Timesheet Approval Status** custom metadata type from the list.



- Click on the **Manage Timesheet Approval Statuses** button.



- Click on the **New** button to create the record.



Step 1: Enter your preferred name to the record on the Label field.

Step 2: Select the “Status” field value from the available picklist.

Step 3: Click on Save.

Step 4: Repeat the same process for multiple status records.

Status: Timesheets with the status of this Metadata type status value will NOT have their statuses updated [to the value stored in Custom Metadata Type 'Pay Period Expiration Status'] when a Timesheet's subsequent Timesheet is auto-generated.

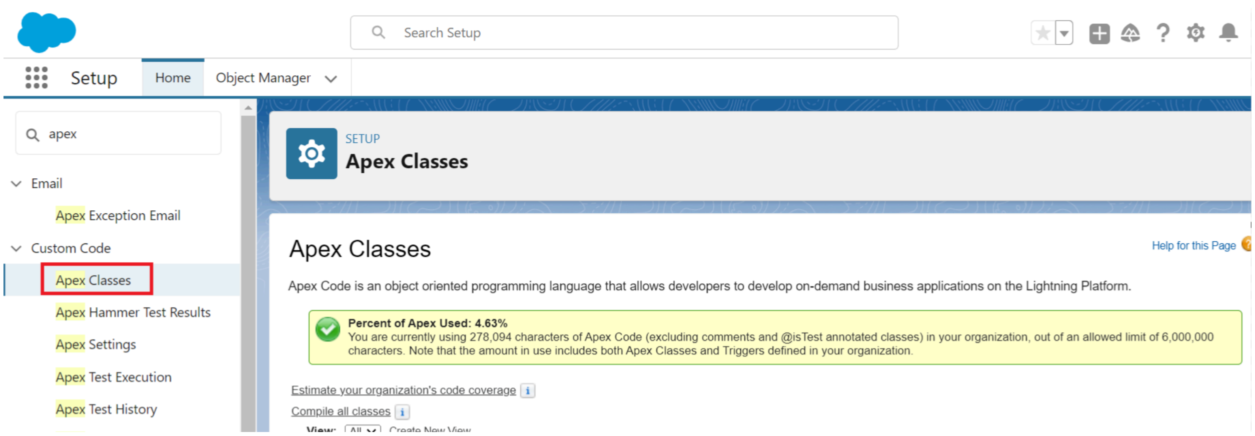
Scenario: If an organization's admins/project managers want to update the user timesheet status to overdue if they are not in either "Submitted for Approval", "Approved" to "Overdue" at the time the new timesheet is created for the user for a new pay period to identify the unsubmitted/unattended timesheets.

Solution: To solve the above problem the organization admin has to

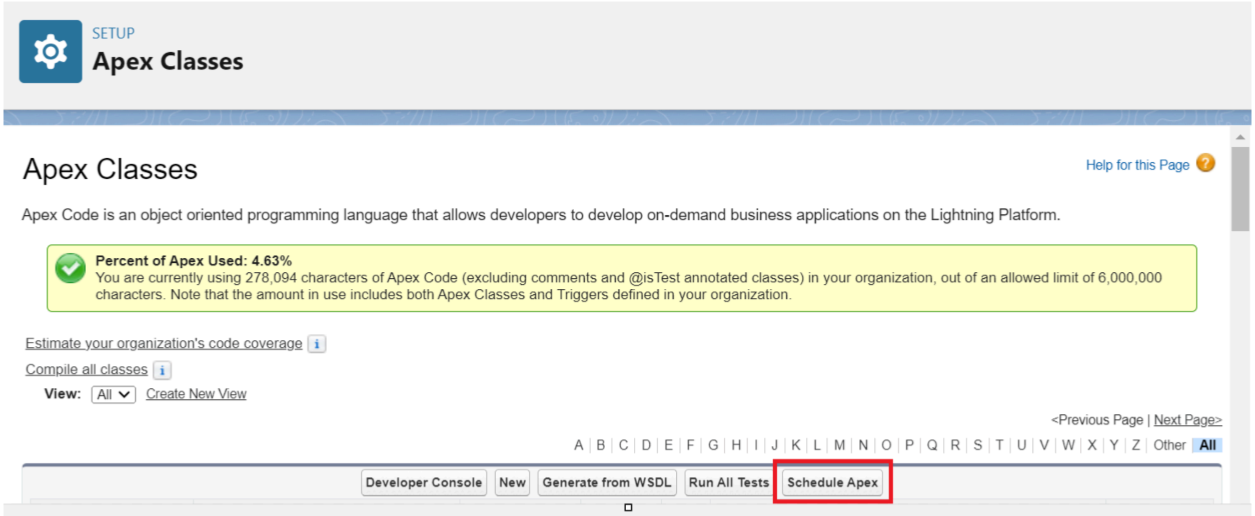
1. Create two records under the "Timesheet Approval Status" custom metadata type object, one with the status value **Submitted for Approval** and another with the status value **Approved**.
2. Update the "DefaultStatus" record of the "Pay Period Range" custom metadata type object as below:
   Status: Overdue.

Schedule the Batch Class:

- From the **Setup**, in the search box, type Apex Classes and then select the **Apex Classes** from the list below the search box as shown in fig.



- Click on the **Schedule Apex** button.



Step 1: Enter your preferred name to the schedule.

Step 2: Select the "TimesheetBatchScheduler" apex class on the Apex Class lookup field.

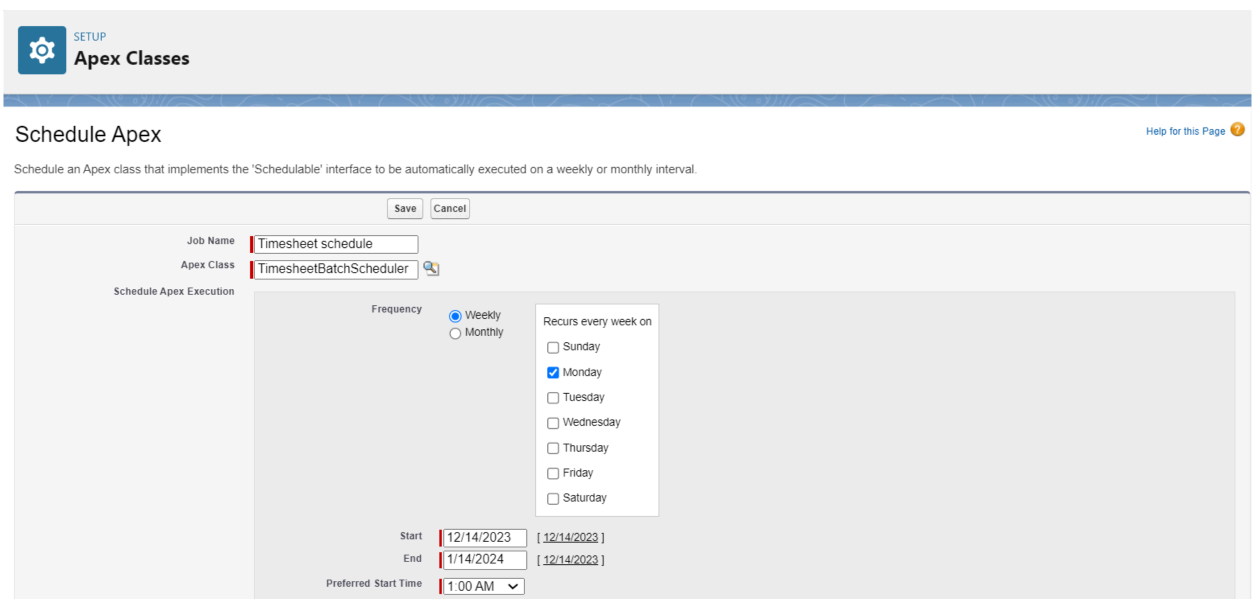
Step 3: Select frequency as Weekly or Monthly as per your preference.

Step 4: If the frequency is 'Weekly' then specify the **Recurs every week on** to run the batch.

Step 5: Specify the Start Date and End Date of the schedule.

Step 6: Select the preferred time of the schedule.

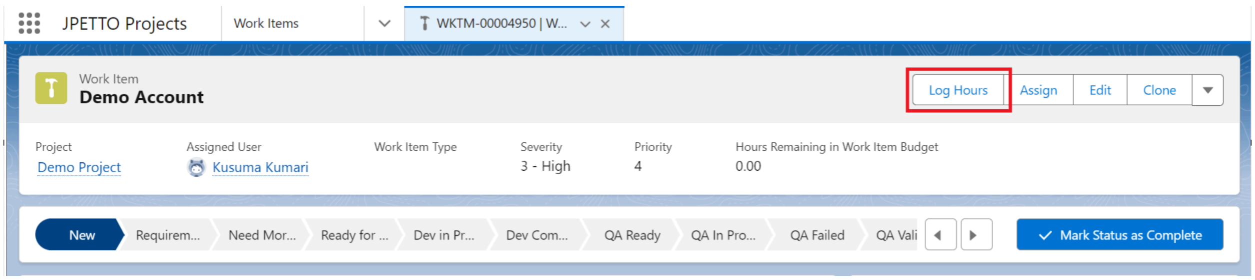
Step 7: Click 'Save'.



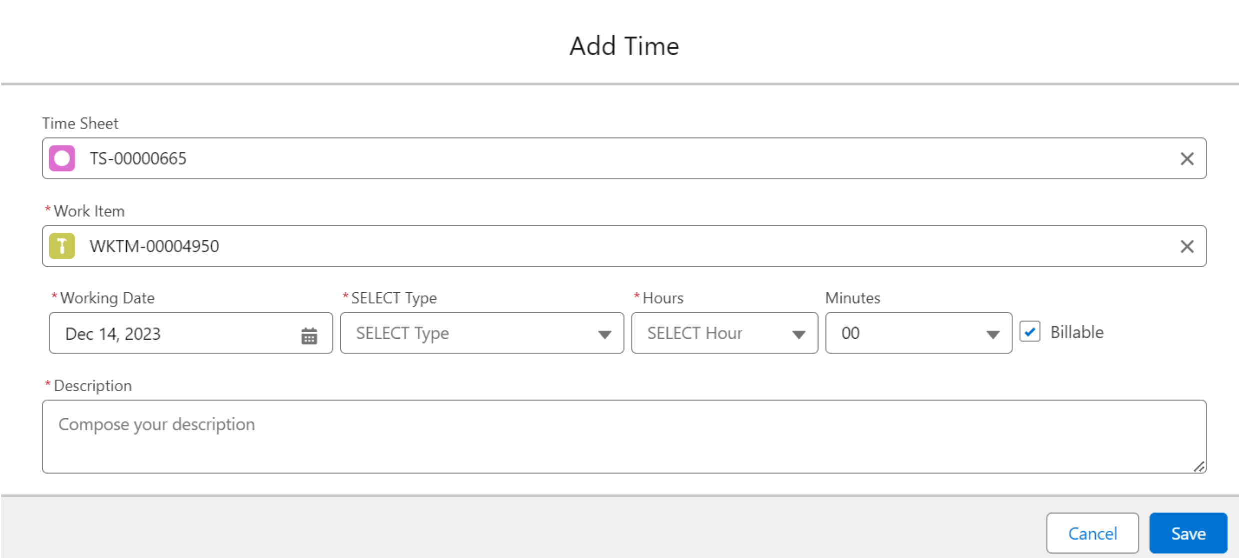
8. Creating a Timesheet Entry

a. From WorkItem Quick Action Button:

- To create a Timesheet Entry, click on the **Log Hours** button on the Work Item Record page of the Work Item record to which you want the Timesheet Entry to relate.

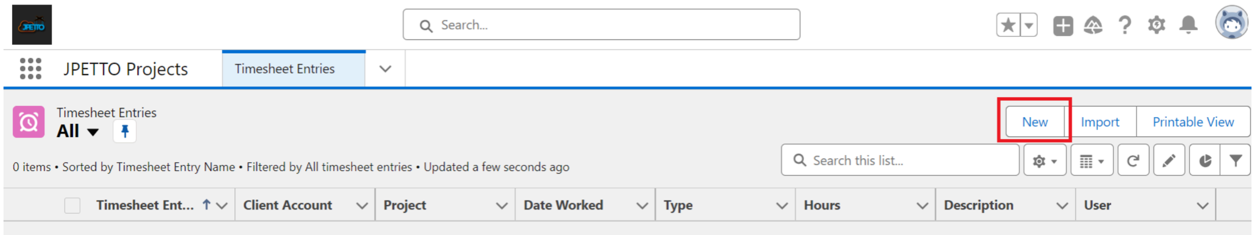


- Timesheet, Work Item and Working Date fields are auto-populated for the entry as follows:
  - The timesheet is pre-populated with the most recent timesheet record created for the user.
  - Work Item is pre-populated with the current work item record from where the **Log Hours** button is initiated.
  - The current Day date is pre-populated on the Working Date field.
- Enter the applicable fields and save the Timesheet Entry.

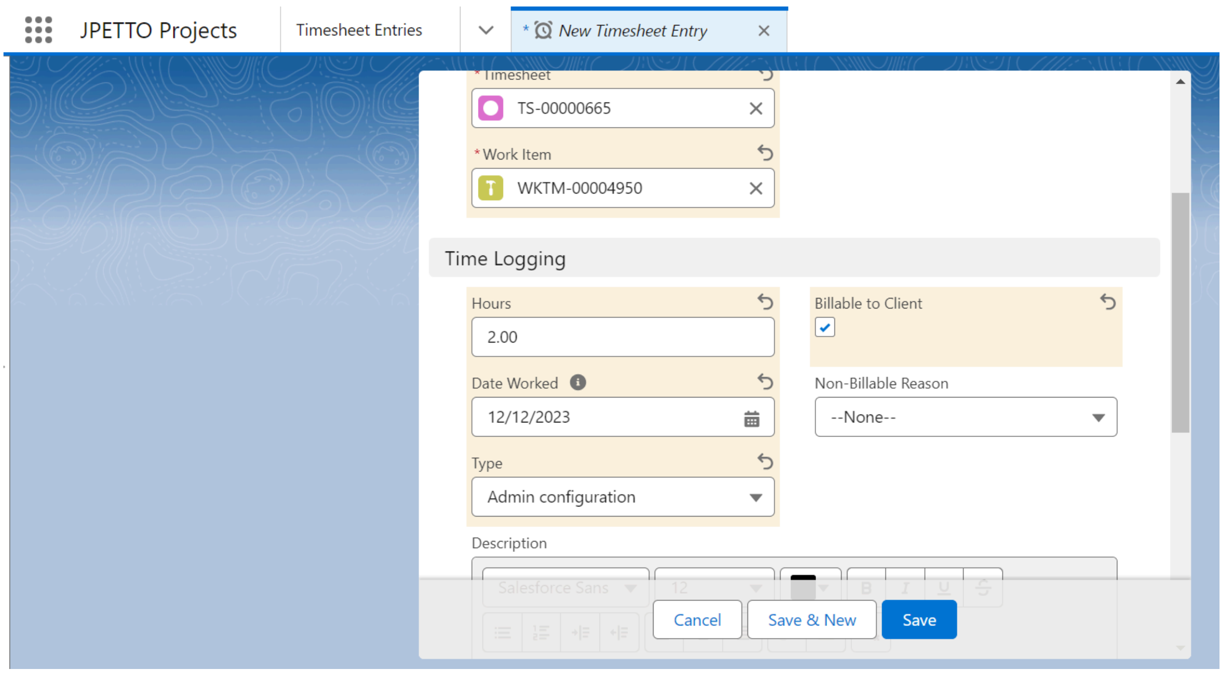


b. From New button on Timesheet Entry tab:

- Alternatively, you can create a new Timesheet Entry by clicking the New button on the list view of the Timesheet Entry tab.



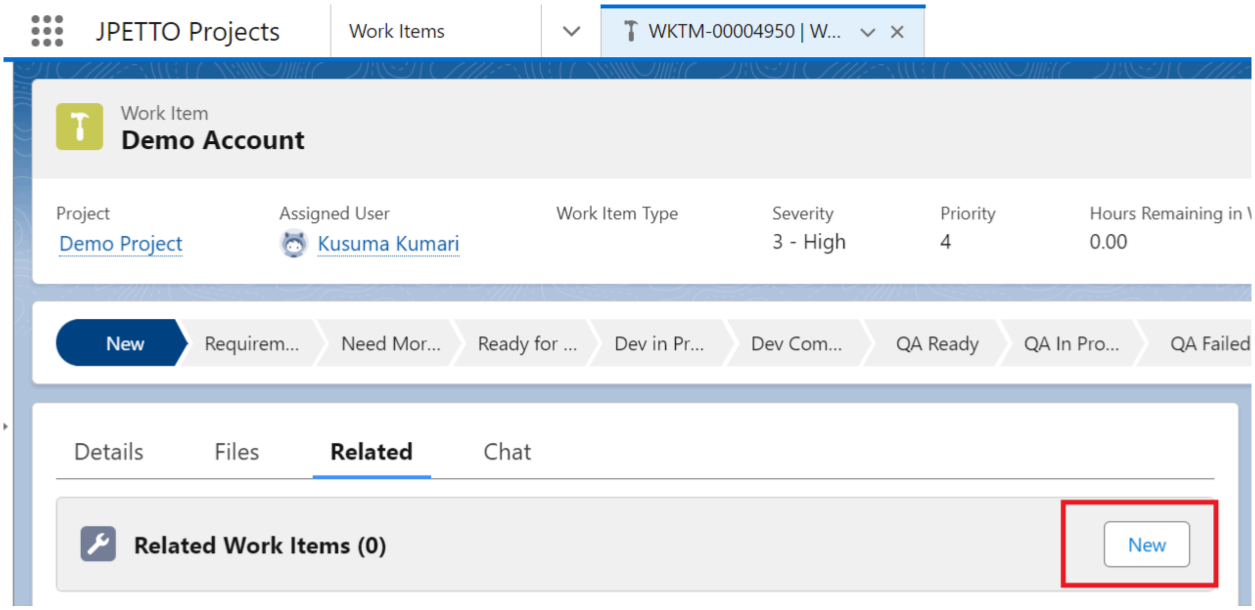
- Enter the applicable details and click save.



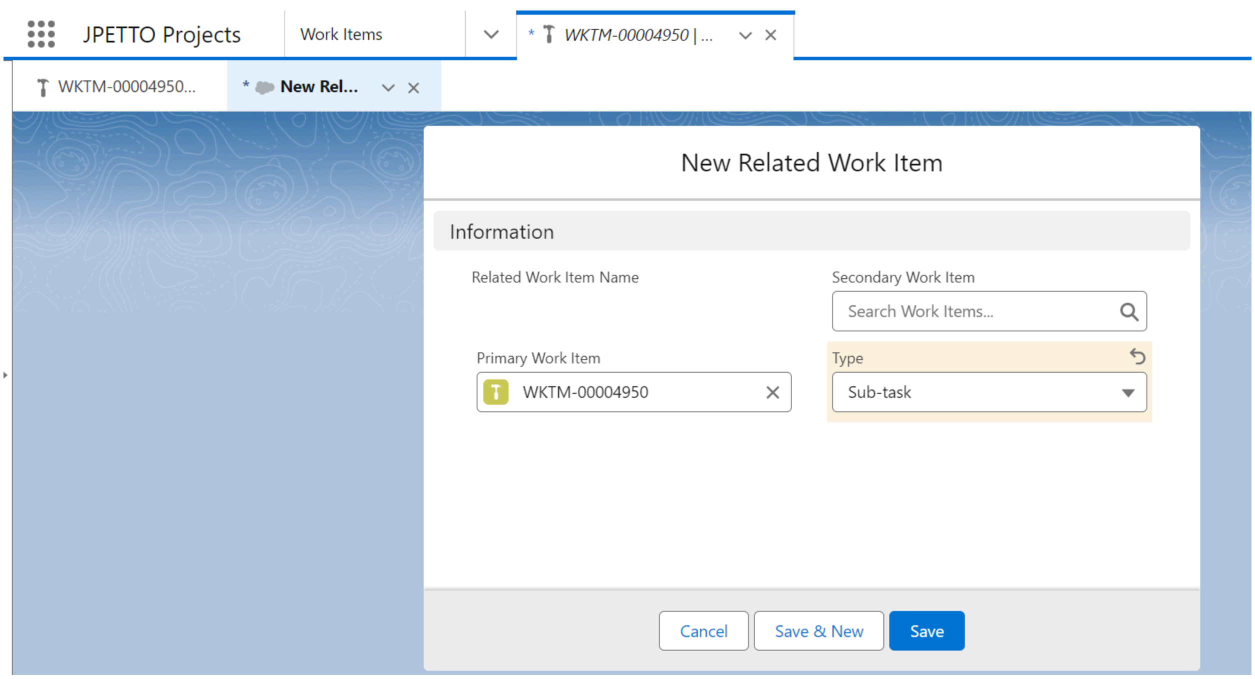
9. Creating a Related Work Item

a. From Work Item Related List:

- To Create a Related Work Item, on the ‘Related’ tab click the New button on the Related Work Items tab of the Related list on the Work Item record you want the Related Work Item to relate to.



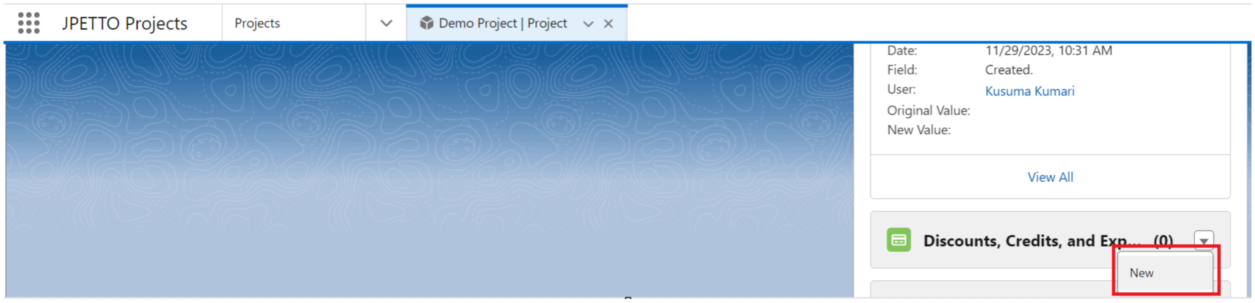
- Enter the applicable fields and save the Related Work Item.



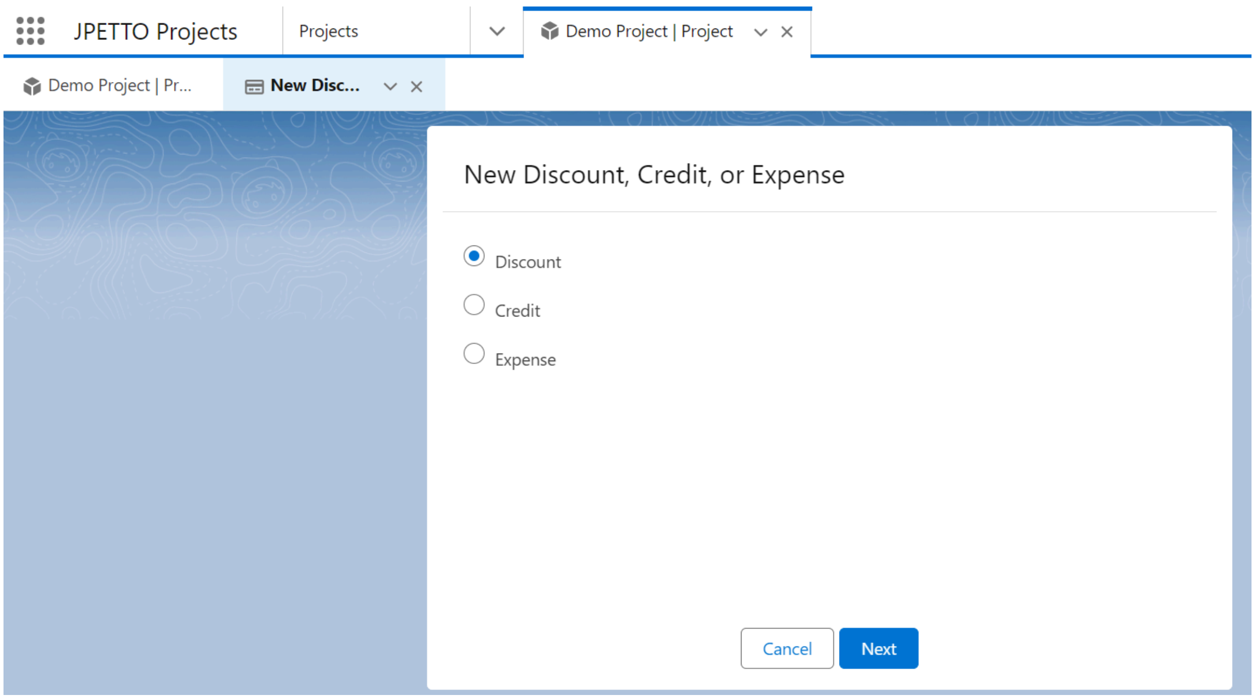
10. Creating a Discount, Credit, or Expense

a. From Project Related List:

- To create a Discount, Credit, or Expense, click on the New button on the Discount, Credit, or Expense of Related list on the Project record to which you want the Discount, Credit, or Expense to relate.



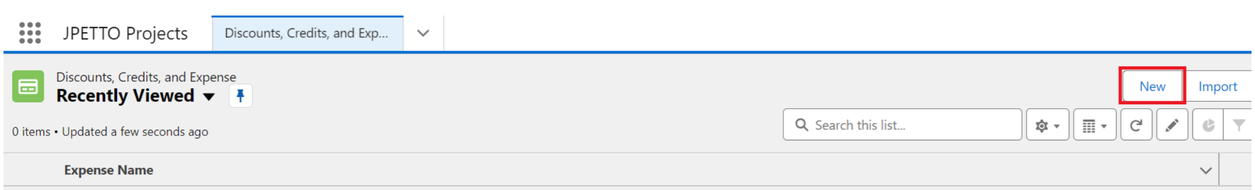
- Select the appropriate record type for the Discount, Credit, or Expense on the following screen.



- Enter the applicable fields and save the Discount, Credit, or Expense.

b. From New button on Discount, Credit, or Expense tab:

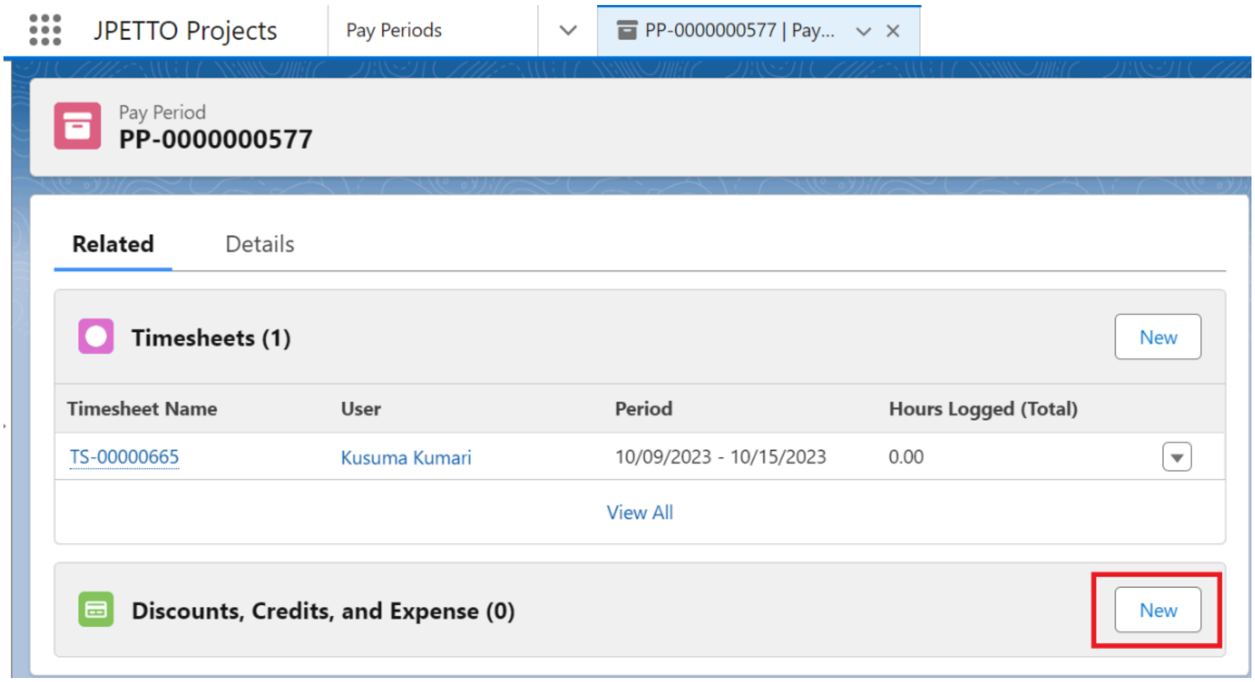
- Alternatively, you can create a new Discount, Credit, or Expense by clicking the New button on the list view of the Discount, Credit, or Expense tab.



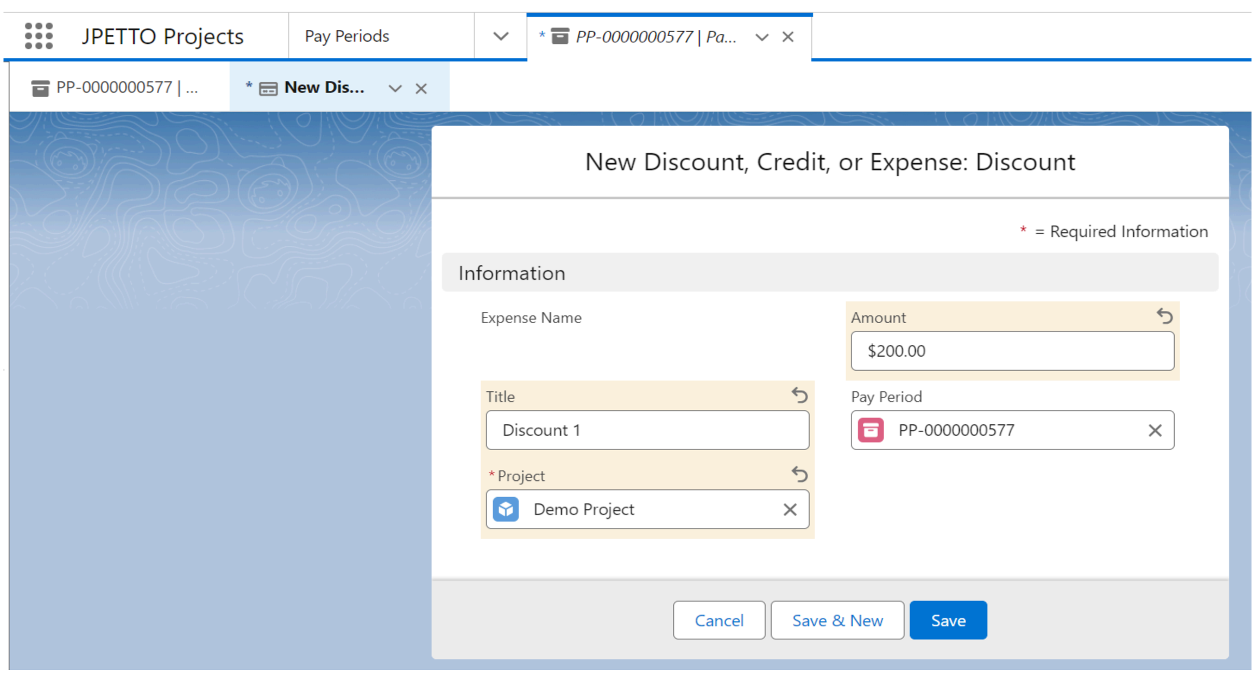
- Select the appropriate record type for the Discount, Credit, or Expense on the following screen.
- Enter the applicable details and click save.

c. **From Pay Period Related list:**

- To Create a Discount, Credit, or Expense, click a New button on the Discount, Credit, or Expense tab of the Related list on the Pay Period record you want the Discount, Credit, or Expense to relate to.



- Select the appropriate record type for the Discount, Credit, or Expense on the following screen.
- Enter the applicable fields and save the Discount, Credit, or Expense.



Additional Features of Jpetto

There are a few additional features available in Jpetto for users along with the basic & special features of Jpetto.

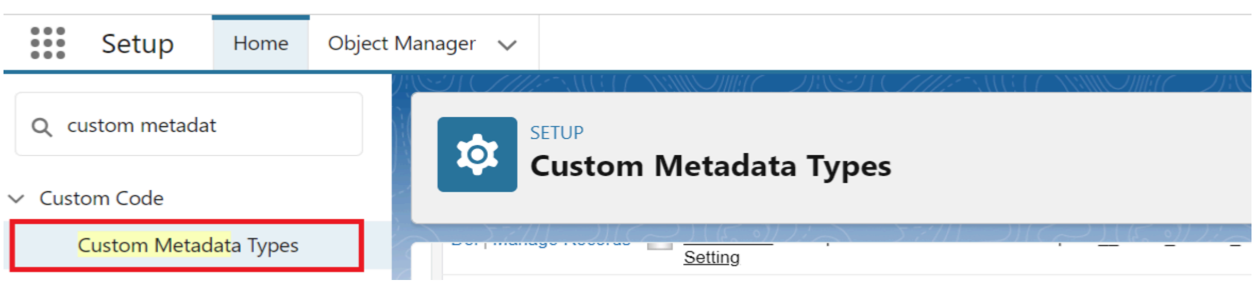
Below is the list of additional features available:

1. Batch Job Failure Notification
2. Enabling Debug Statements in Logs
3. Non-Billable Timesheet Entries
4. Enable/Disable Triggers
5. Allotting Vacation Days for Employees
6. Vacation Hours settings
7. Vacation Leave Approval Request
8. Consumed Hours Component
9. Assign Work Item with Quick Action
10. Setup Salesforce with Google Single Sign-on(SSO)
11. Share Access from Project Team Members
12. Disable **Show Error Message on Delete WorkItems** flow
13. Communication Templates for Batch Failures
14. Restrict to add duplicate PTM (Project Team Members)

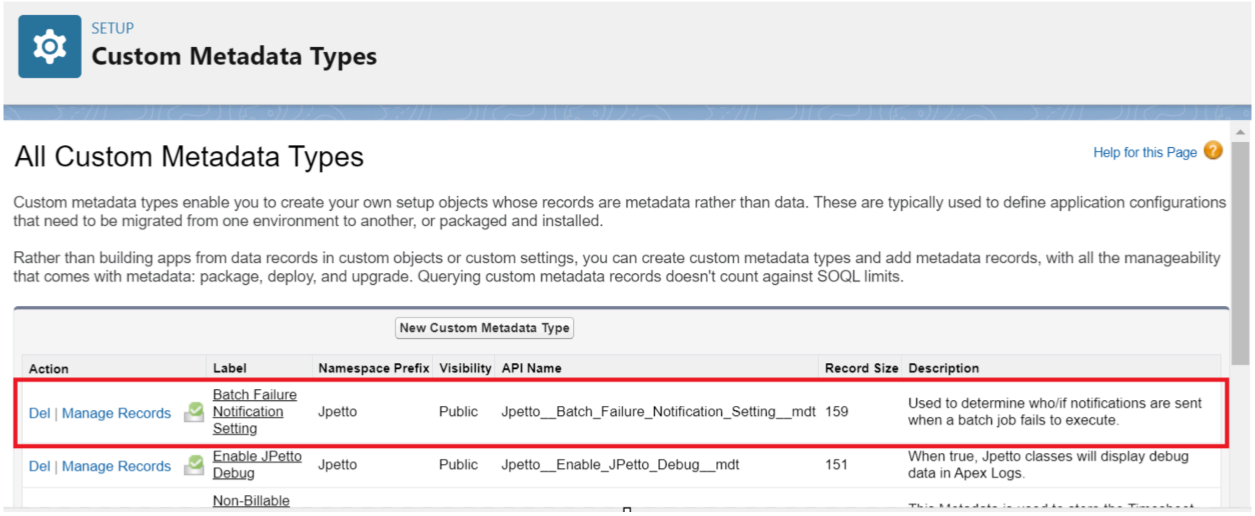
1. Batch Job Failure Notification

- This feature is used to notify the specified user by email if any of the scheduled batch jobs fails while running.
- To enable this feature, follow the below steps:

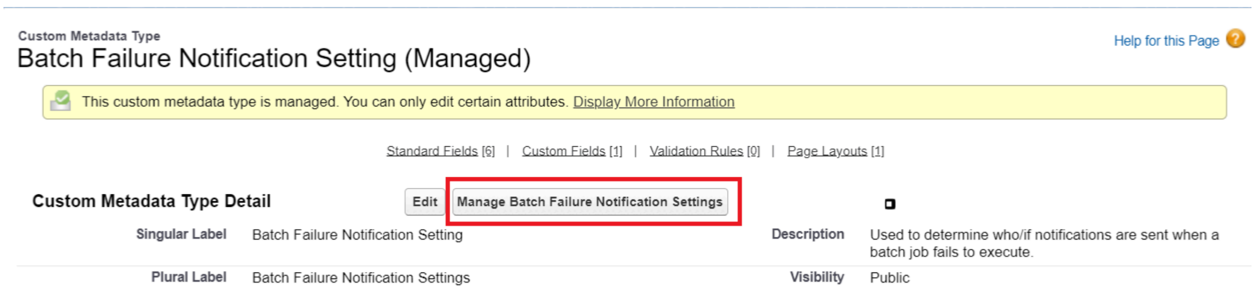
  Step 1: From the **Setup**, in the search box, type custom metadata and select the **Custom Metadata Types** from the list below the search box as shown in fig.



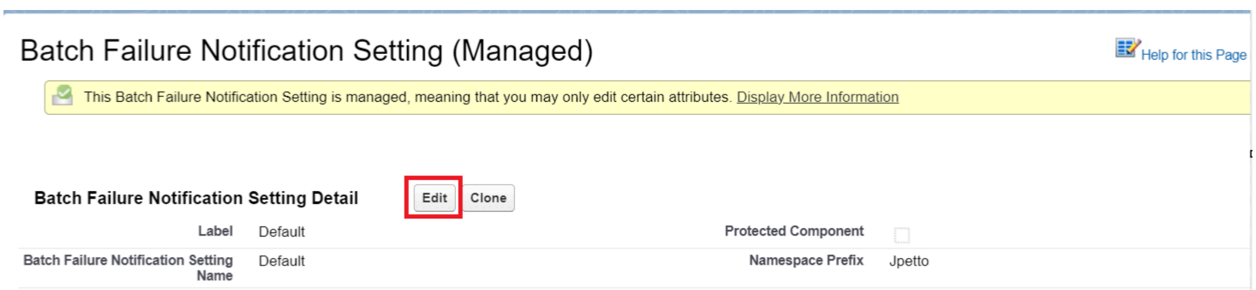
  Step 2: Select the **Batch Failure Notification Setting** custom metadata type from the list.



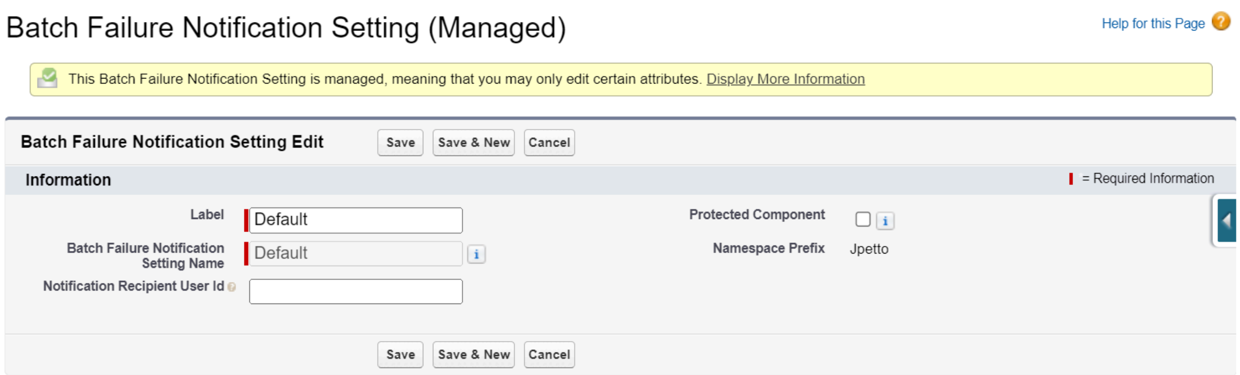
Step 3: Click on the **Manage Batch Failure Notification Settings** button.



Step 4: Select the **Default** record from the list and click the **Edit** button to update the record.



Step 5: Update the **User ID** of the user in the **Notification Recipient User Id** field to receive an email notification, if any scheduled batch job fails.

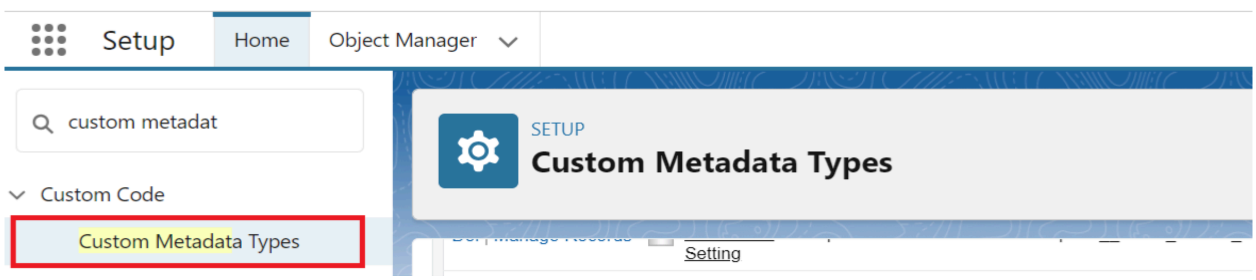


Step 6: Click **Save**.

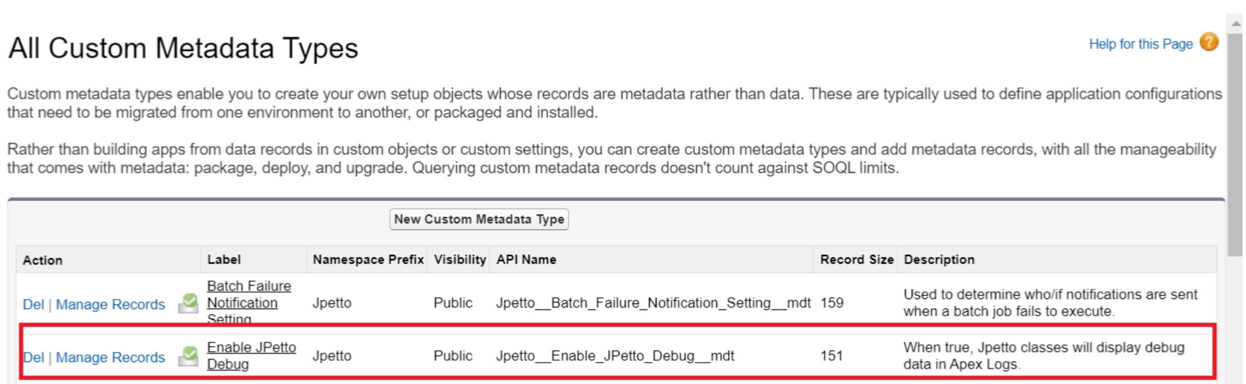
2. Enabling Debug Statements in Logs

- This feature is used to display debug statements of managed package apex classes in debug logs which helps to resolve bugs.
- To enable this feature follow the below steps:

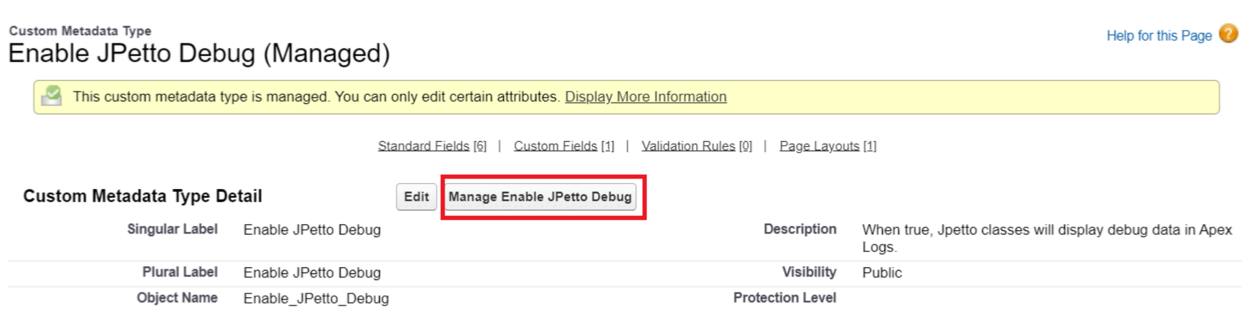
  Step 1: From the **Setup**, in the search box, type custom metadata and select the **Custom Metadata Types** from the list below the search box as shown in fig.



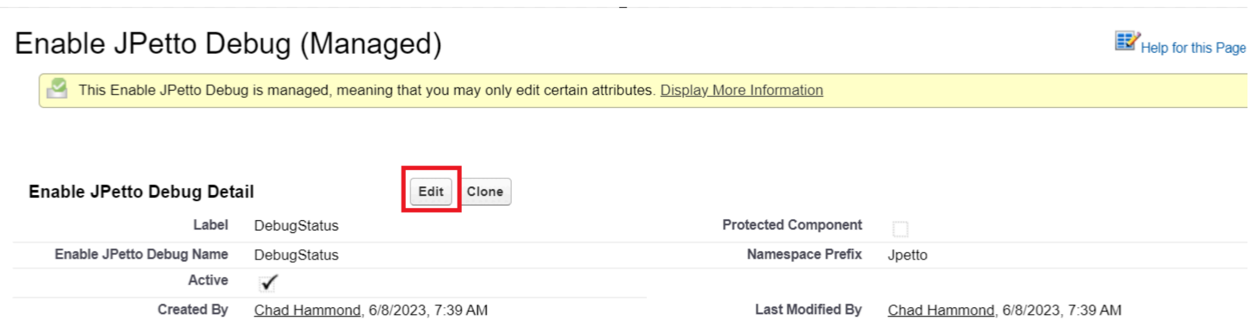
Step 2: Select the **Enable JPetto Debug** custom metadata type from the list.



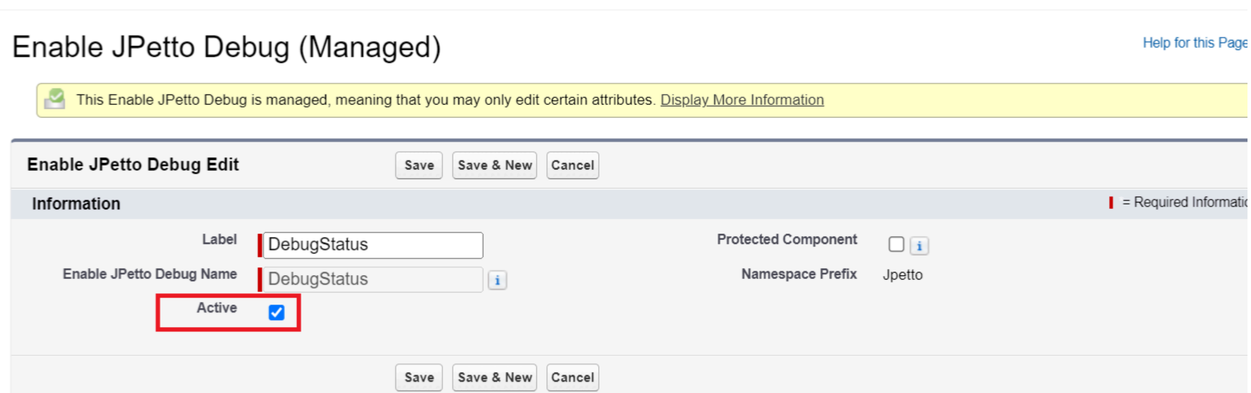
Step 3: Click on the **Manage Enable JPetto Debug** button.



Step 4: Select the **DefaultStatus** record from the list and click the **Edit** button to update the record.



Step 5: Check the **Active** checkbox to enable debug statements in Apex logs.

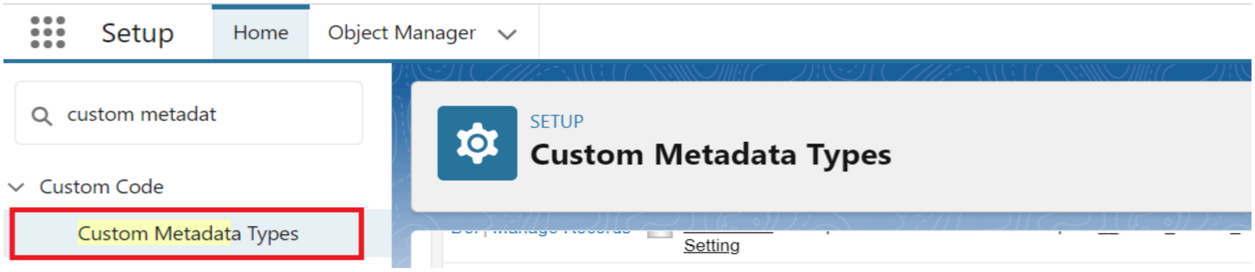


Step 6: Click **Save**.

3. Non-Billable Timesheet Entries

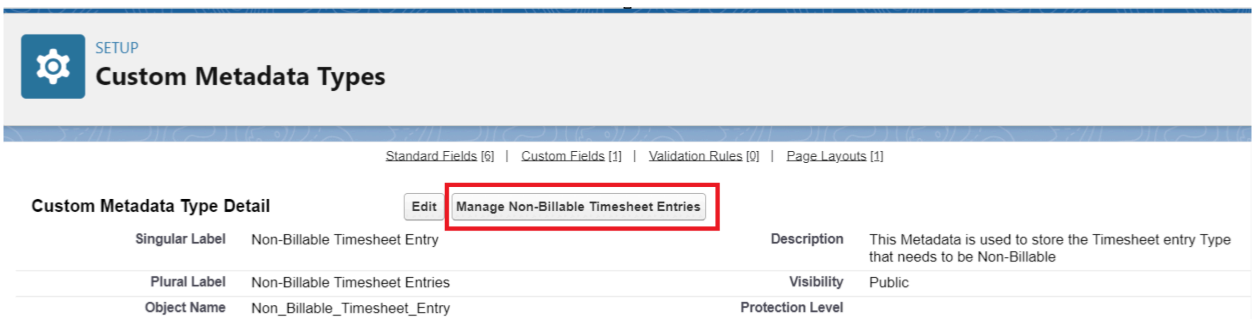
- This feature stores the Timesheet entry Type that needs to be Non-Billable.
- To enable this feature follow the below steps:

  Step 1: From the **Setup**, in the search box, type custom metadata and select the **Custom Metadata Types** from the list below the search box as shown in fig.

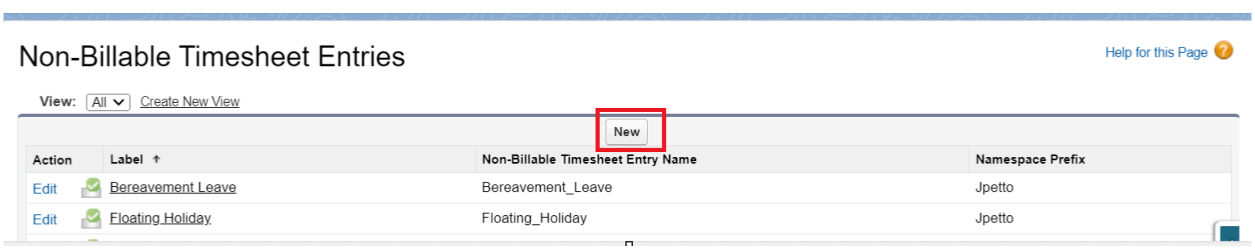


Step 2: Select the **Non-Billable Timesheet Entries** custom metadata type from the list.

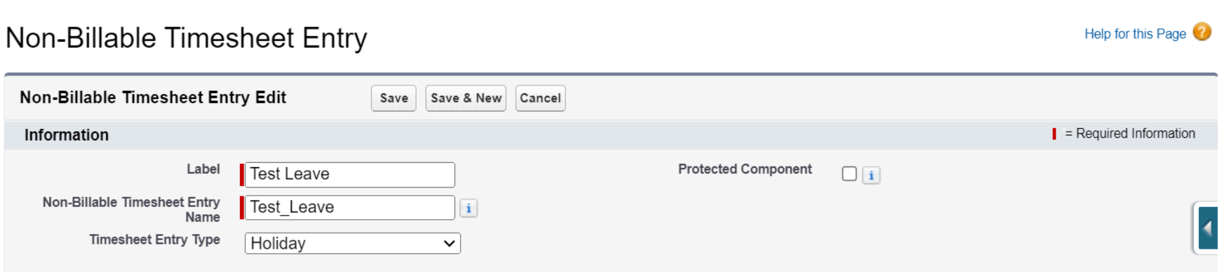
Step 3: Click on the **Manage Non-Billable Timesheet Entries** button.



Step 4: A few timesheet entry types are already added to the list. To add a new click on the **New** button.



Step 5: Give your preferred name on the **Label** field and select the type which you want to make non-billable from the picklist values of the **Timesheet Entry Type** field.

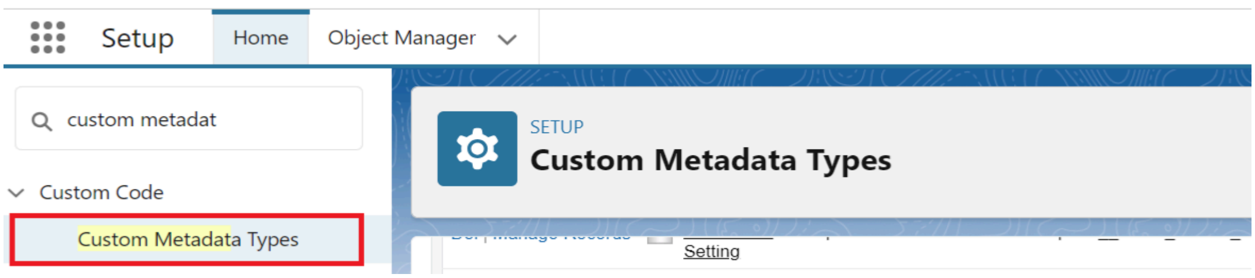


Step 6: Click **Save**.

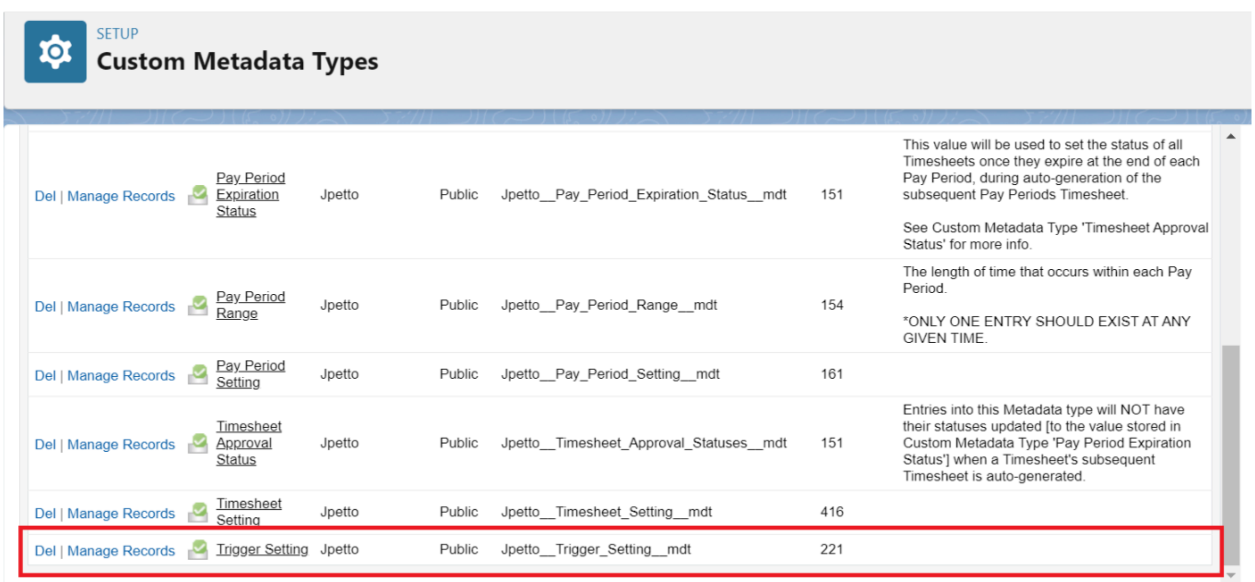
4. Enable/Disable Triggers

- This feature is used to enable/disable the existing triggers of Jpetto to run(all the trigger functionalities will run after enabling the trigger events in this custom metadata).
- To enable this feature follow the below steps:

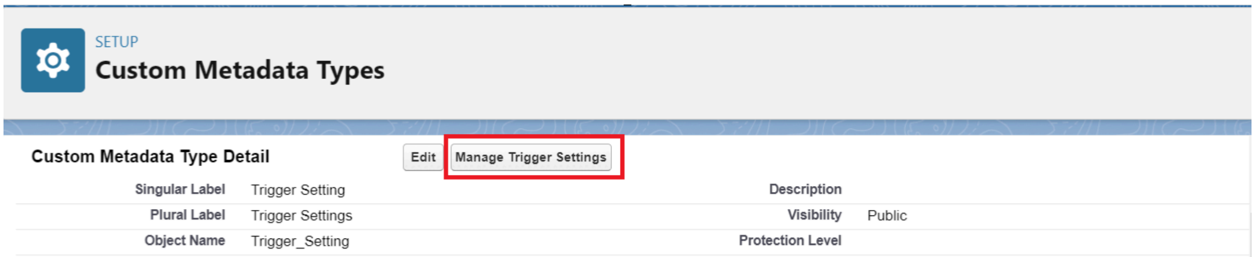
Step 1: From the **Setup**, in the search box, type custom metadata and select the **Custom Metadata Types** from the list below the search box as shown in fig.



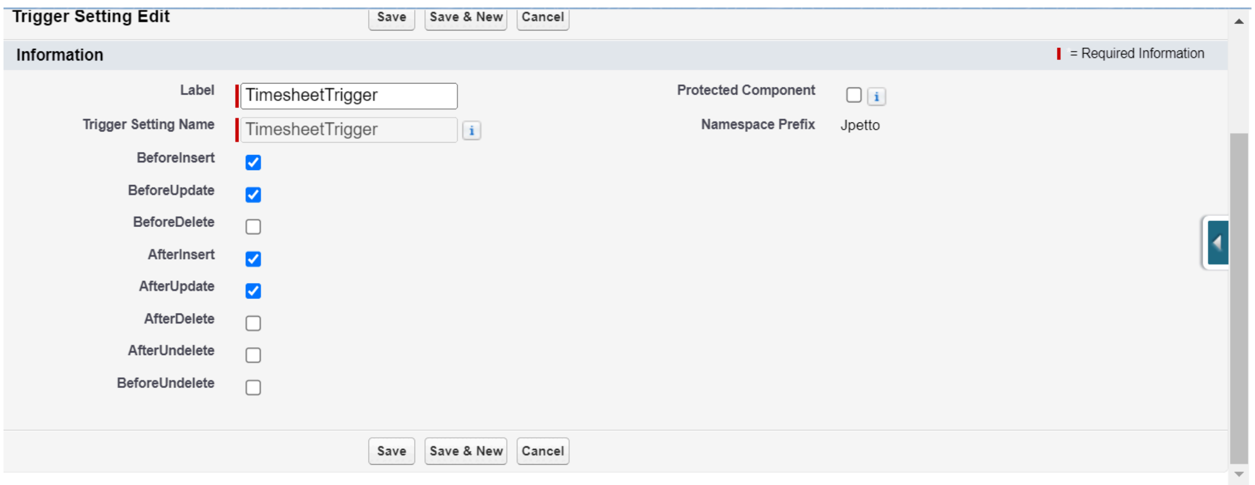
Step 2: Select the **Trigger Settings** custom metadata type from the list.



Step 3: Click on the **Manage Trigger Settings** button.



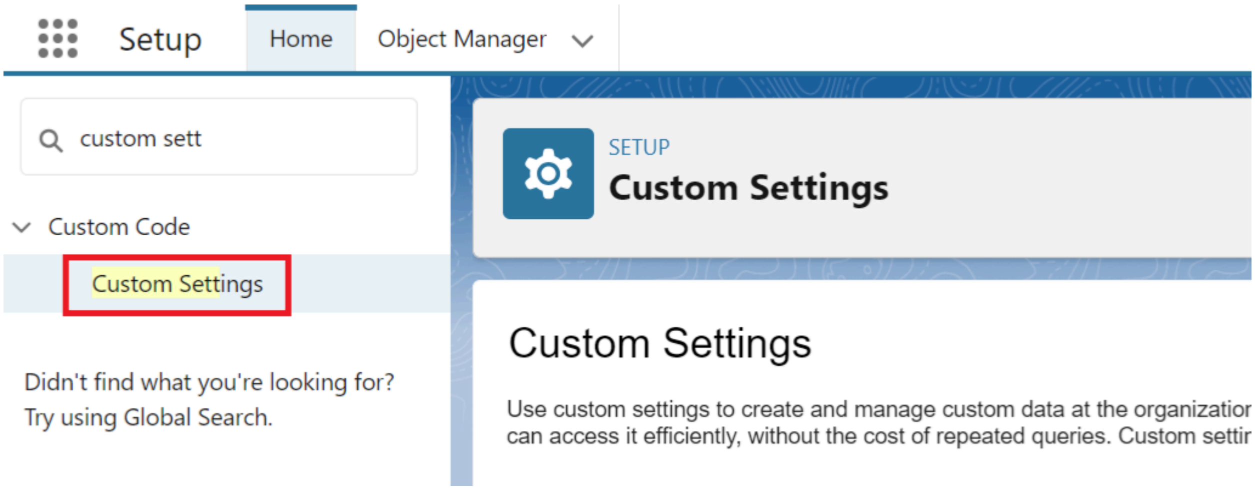
Step 4: All the triggers available in Jpetto are added to the custom metadata type list, update the checkboxes of the trigger event fields to run.By default, all the trigger events checkboxes are enabled.



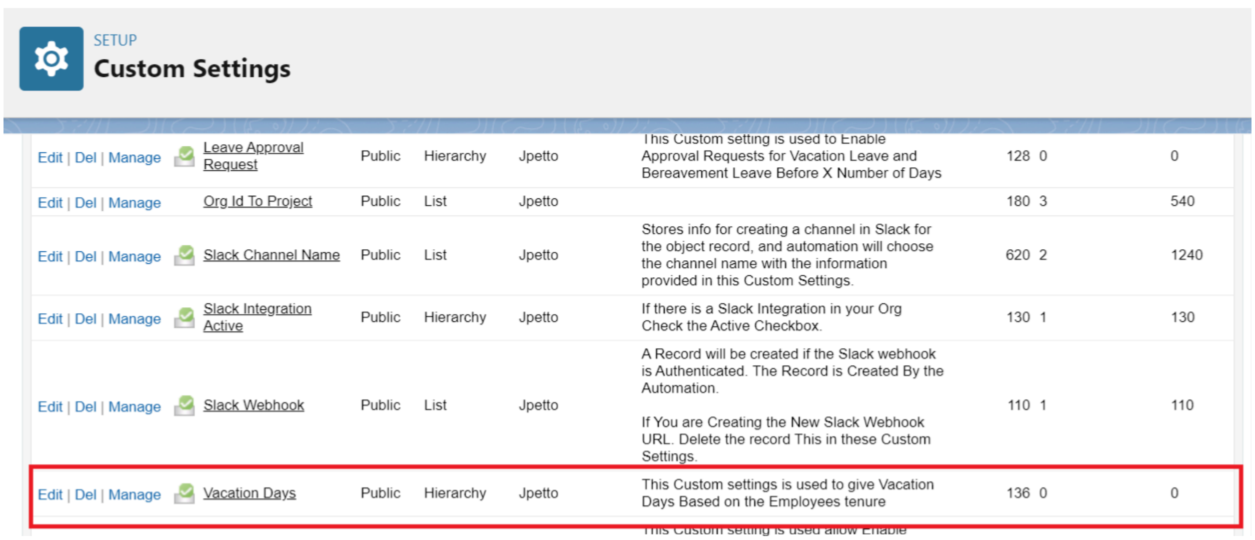
5. Allotting Vacation Days for Employees

- For each employee of the organization, a few vacation days are allowed to go & enjoy vacation based on the employee tenure can be defined by this custom setting.
- To enable this feature follow the below steps:

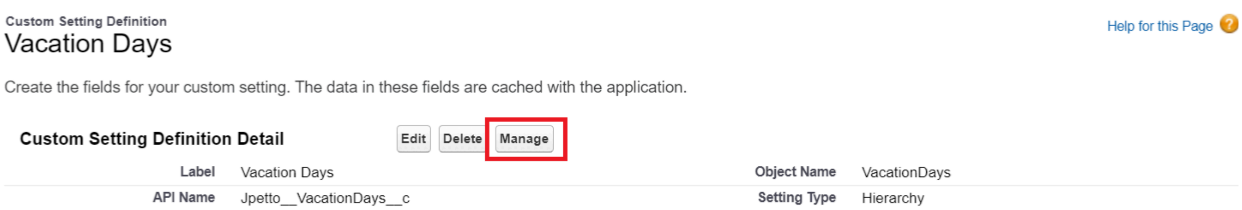
  Step 1: From the **Setup**, in the search box, type custom settings and then select the **Custom Settings** from the list below the search box as shown in fig.



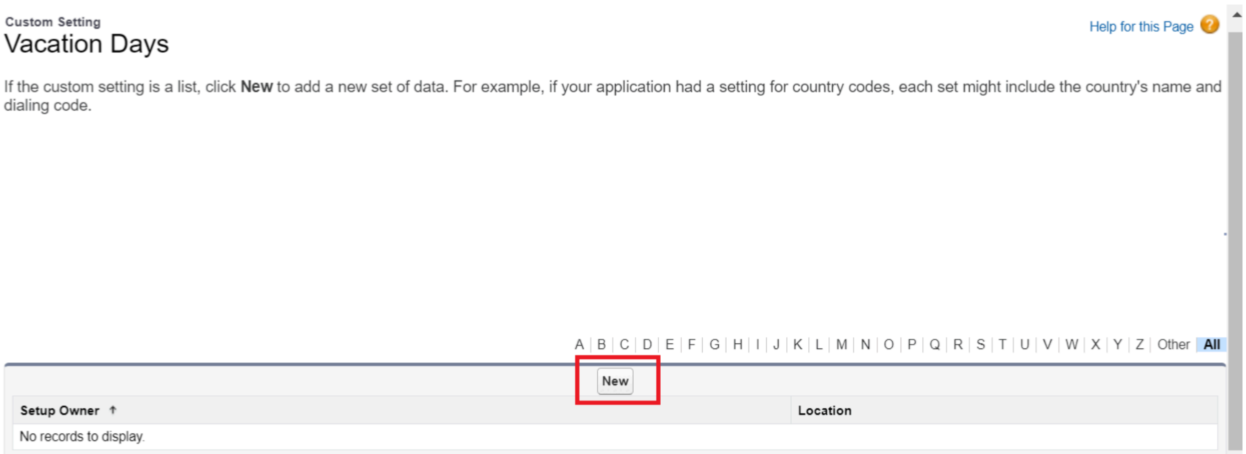
Step 2: Select the **Vacation Days** custom settings from the list.



Step 3: Click on the **Manage** button.



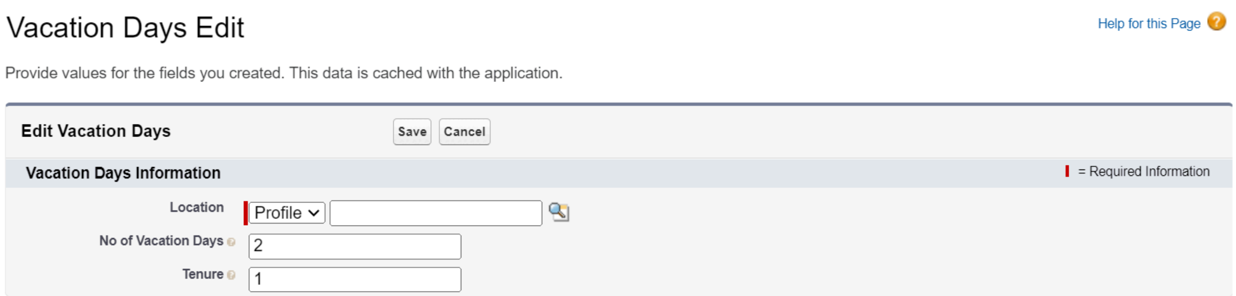
Step 4: If a record is available, edit the existing record; otherwise create a new record by clicking on the **New** button as below.



Step 5: Enter the no.of vacation days allotted for the tenure below as per your organization policy in the **No of Vacation Days** field.

Step 6: Enter the tenure of the employee in the **Tenure** field to whom the vacation days value entered in the above step needs to apply.

Note: For 1 Year Tenure, Enter 1. For two years tenure Enter 2. For 3 Years, Enter 3. For the probation period, enter 0.



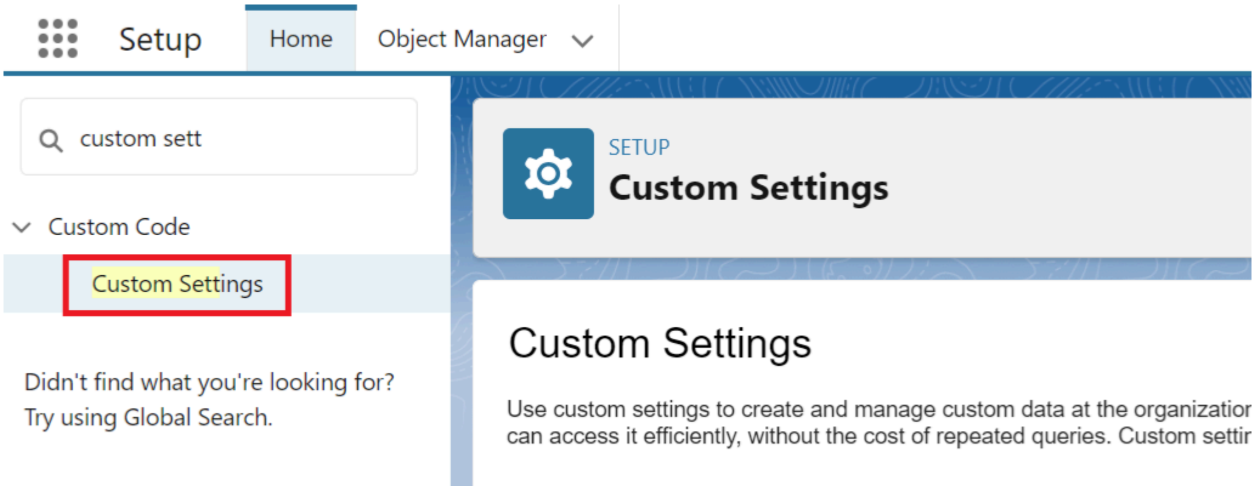
Step 7: Click **Save**.

Step 8: Repeat the steps from 3 to 7 to create records for different tenures.

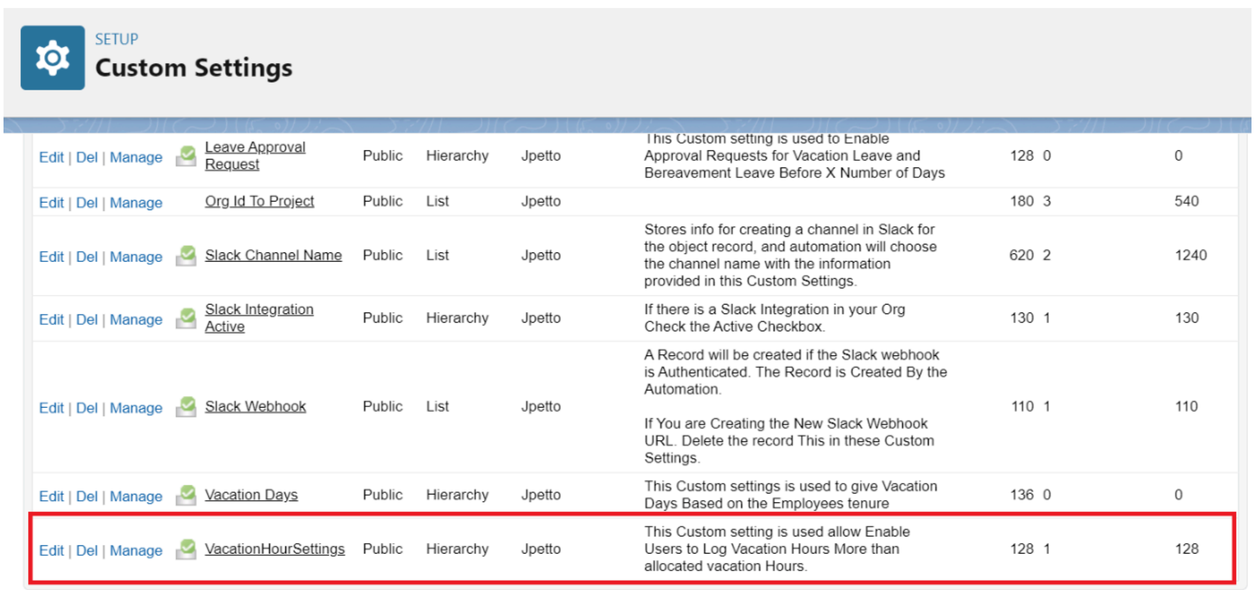
6. Vacation Hours settings

- This feature is used to mention how many hours employees can exceed the vacation hours than the vacation days allotted to them based on their tenure.
- To enable this feature follow the below steps:

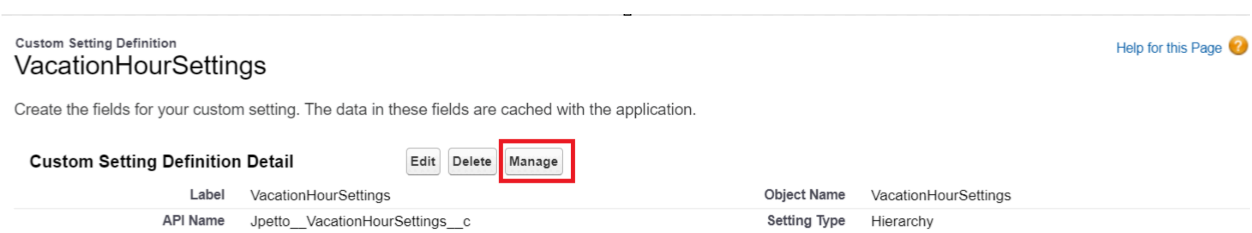
  Step 1: From the **Setup**, in the search box, type custom settings and select the **Custom Settings** from the list below the search box as shown in fig.



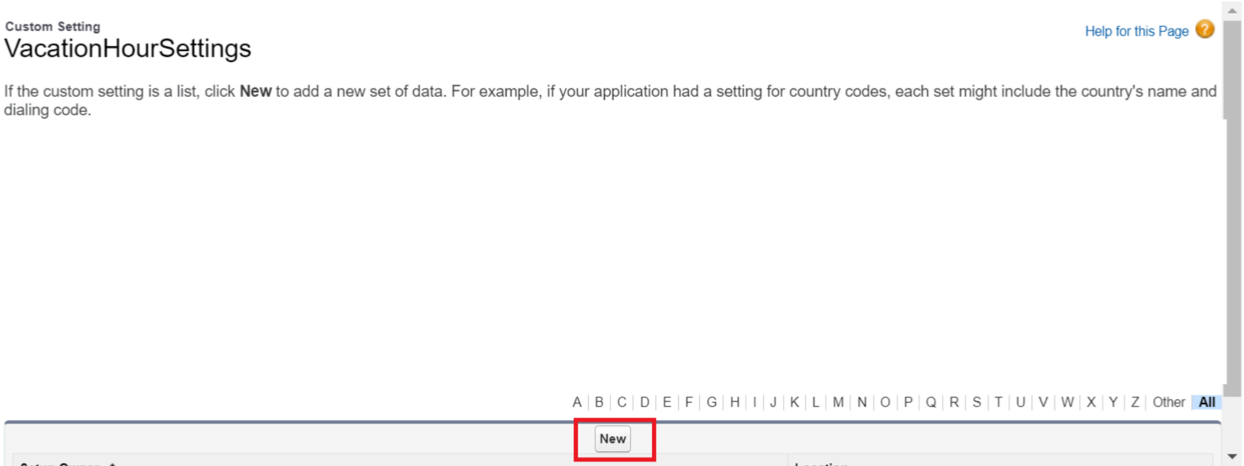
Step 2: Select the **VacationHourSettings** custom settings from the list.



Step 3: Click on the **Manage** button.

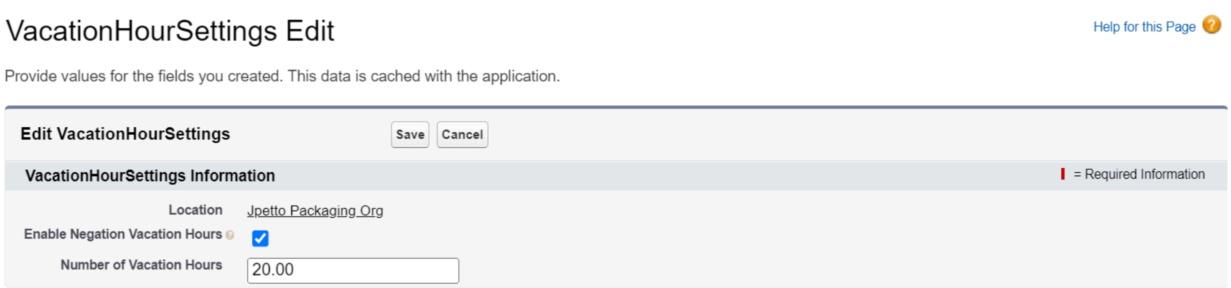


Step 4: If a record is available, edit the existing record; otherwise create a new record by clicking on the **New** button as below.



Step 5: Check the checkbox of **Enable Negation Vacation Hours** field.

Step 6: Enter the no.of hours in the **Number of Vacation Hours** field.

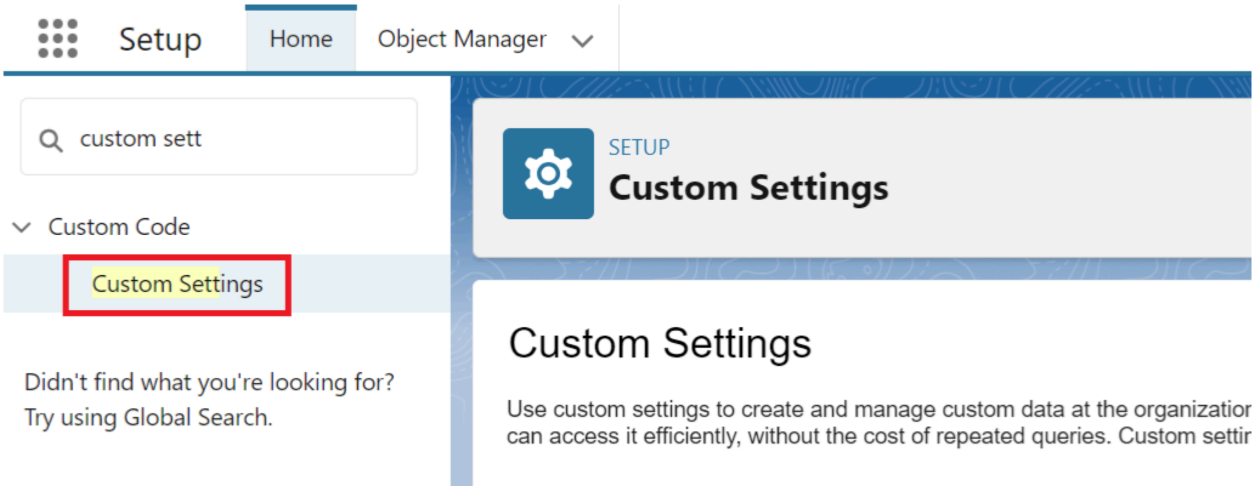


Step 7: Click **Save**.

7. Vacation Leave Approval Request

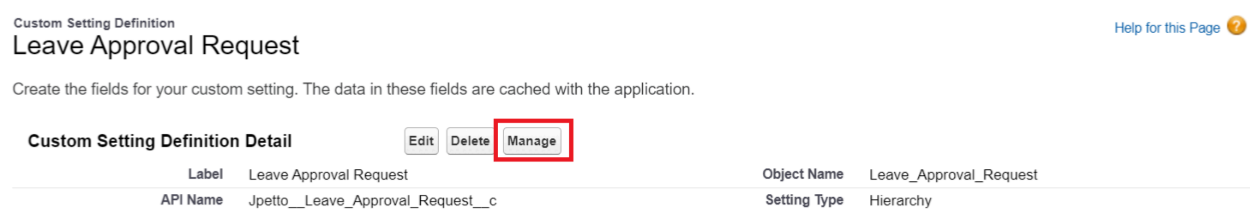
- This feature is used to enable the approval process for vacation leaves & Bereavement leaves before how many no.of days.
- To enable this feature follow the below steps:

  Step 1: From the **Setup**, in the search box, type custom settings and select the **Custom Settings** from the list below the search box as shown in fig.

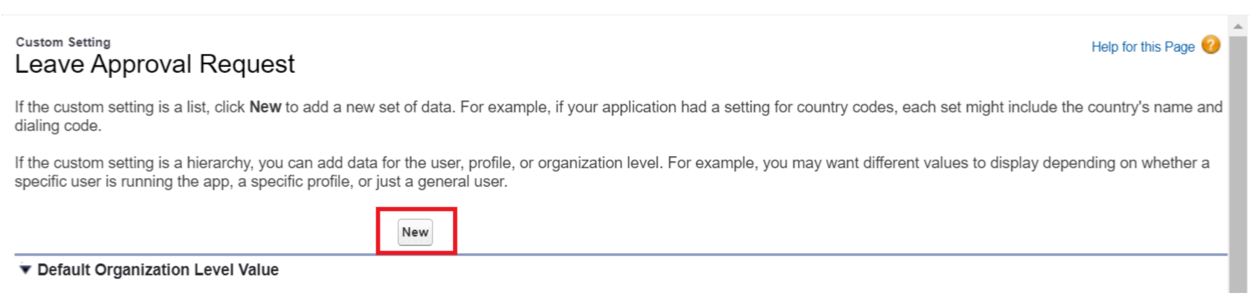


Step 2: Select the **Leave Approval Request** custom settings from the list.

Step 3: Click on the **Manage** button.

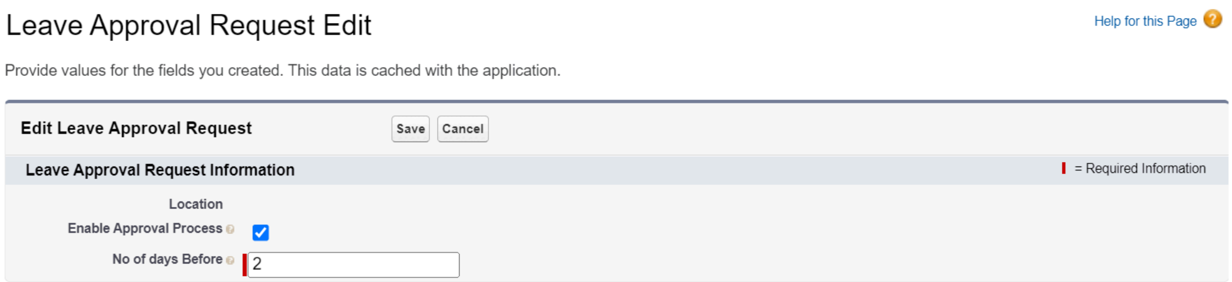


Step 4: If a record is available, edit the existing record; otherwise create a new record by clicking on the **New** button as below.



Step 5: Check the checkbox of the **Enable Approval Process** field.

Step 6: Enter the no.of days in the **No of days Before** field.



Step 7: Click **Save**.

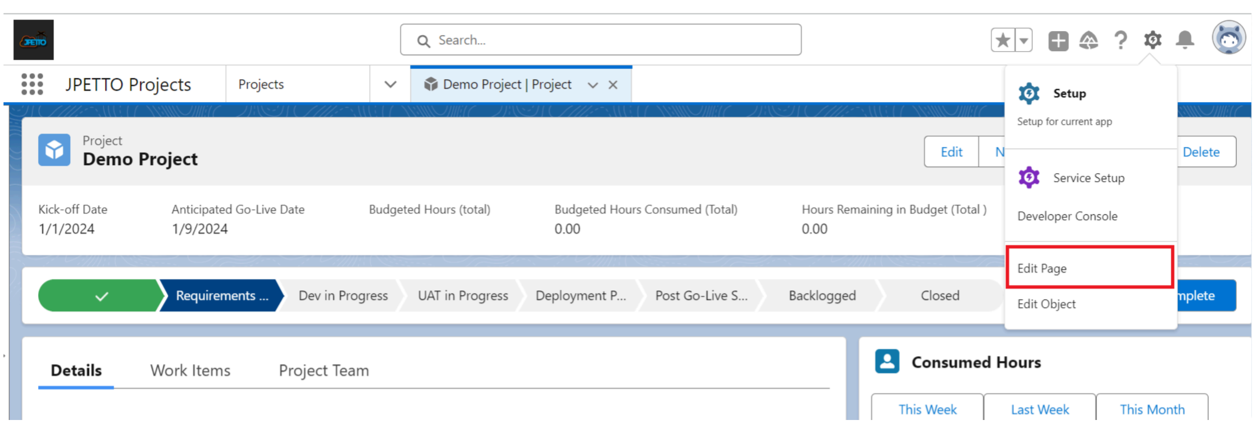
8. Consumed Hours Component

- This component is used to get the total hours logged by the users on the Account/ Project/Work Item for a selected period.
- You can use this component on the Account or Project or Work Item record pages.
- From this component Project Managers/Admins can get the total billable hours/total non-billable hours/total hours logged by the users for the Current Week/Last Week/Current Month/Last Month/All Time/Custom Time.
- Along with the logged hours we can get the cost details for the selected time with respect to the hours logged by the users for that particular period by assigning the required permission set.
- To use this component follow the below steps:

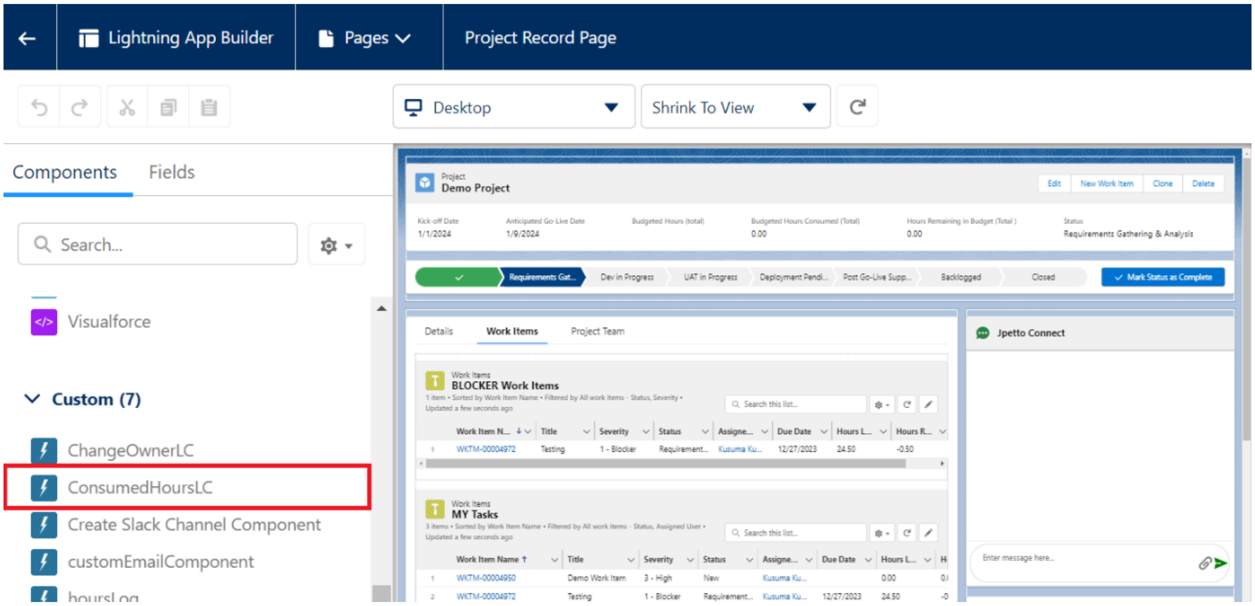
  Step 1: Go to the record page of the object (Account or Project or Work Item) where you want to use the **Consumed Hours Component** and check whether the Consumed Hours Component is available on the page or not.

  Step 2: If the component is not available on the page, follow the below steps to add it; otherwise skip till step 5.

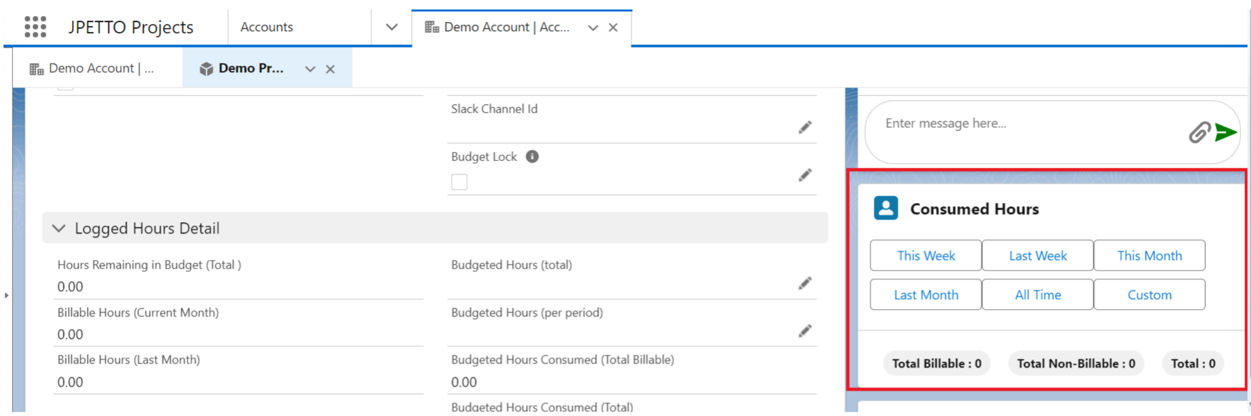
  Step 3: Click on the **Gear** icon of the page and then click on the **Edit Page** option.



Step 4: Drag the **ConsumedHoursLC** custom component from the components list to the desired position on the record page.



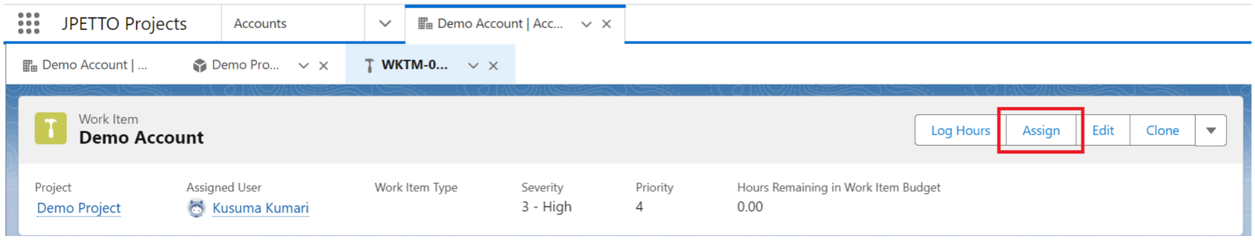
Step 5: Save the changes and go back to the record page.



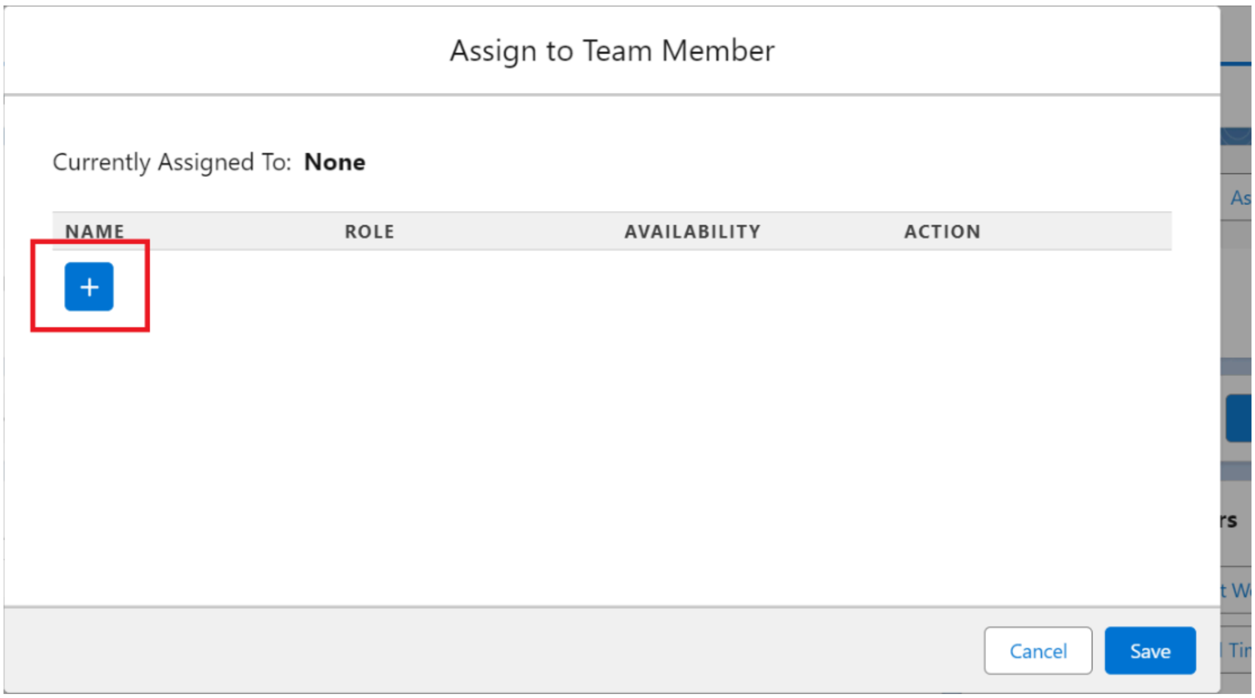
Step 6: Select the required buttons among the 6 (This Week, Last Week, This Month, Last Month, All Time, Custom) on the Consumed Hours component to get the details of hours logged by the users.

9. Assign Work Item with Quick Action

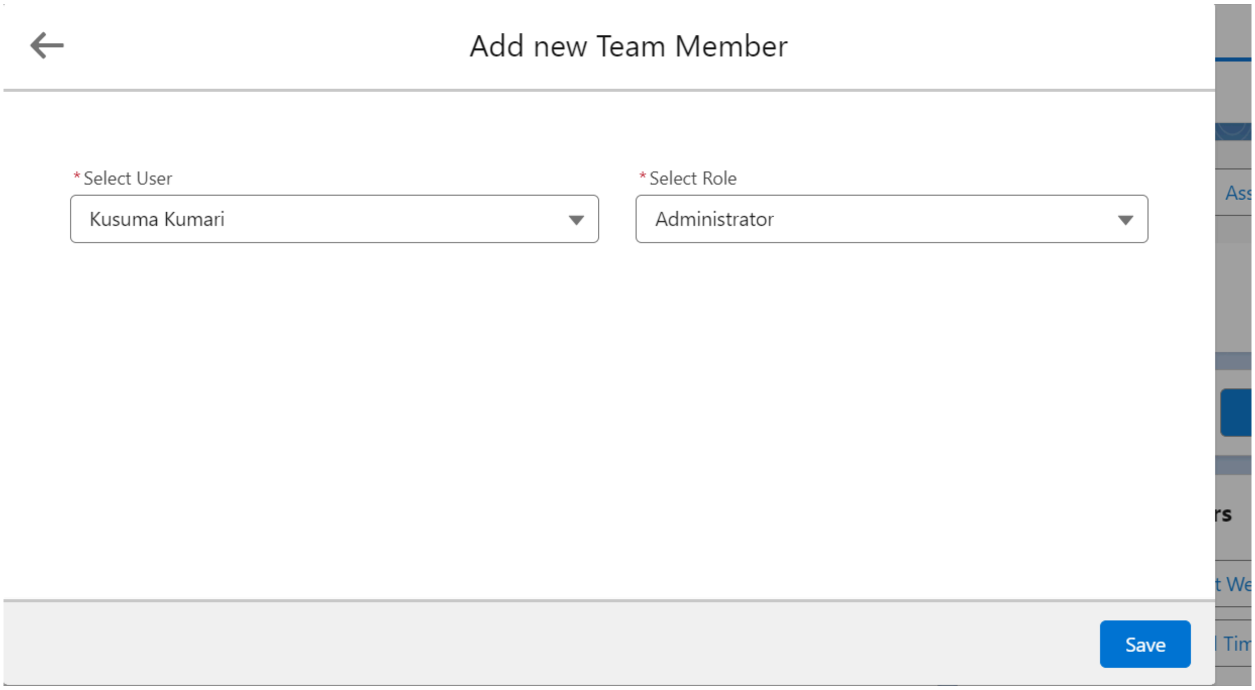
- This Quick action button in the work item record page is used to add new team members to the project and quickly assign the work item to the newly added or existing team members with just 2 or 3 clicks.
- Go to the work item record page and click on the **Assign** quick action button.



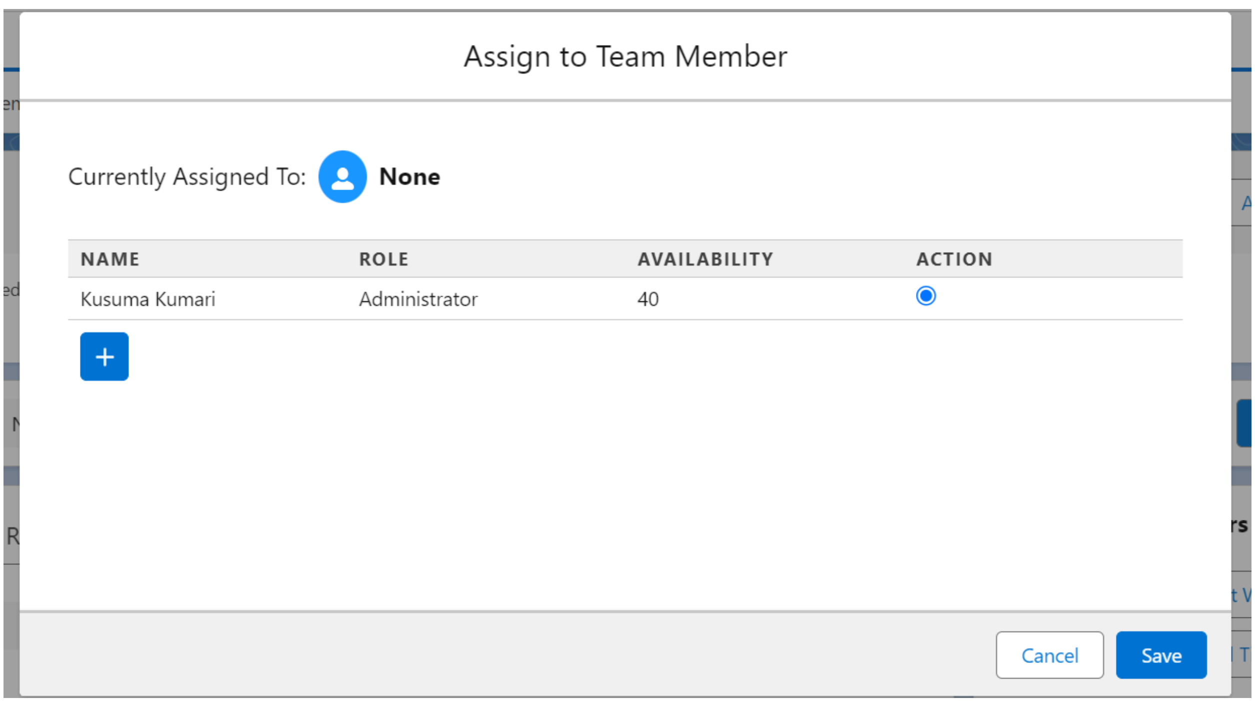
- Click on the **'+'** symbol on the pop-up screen.



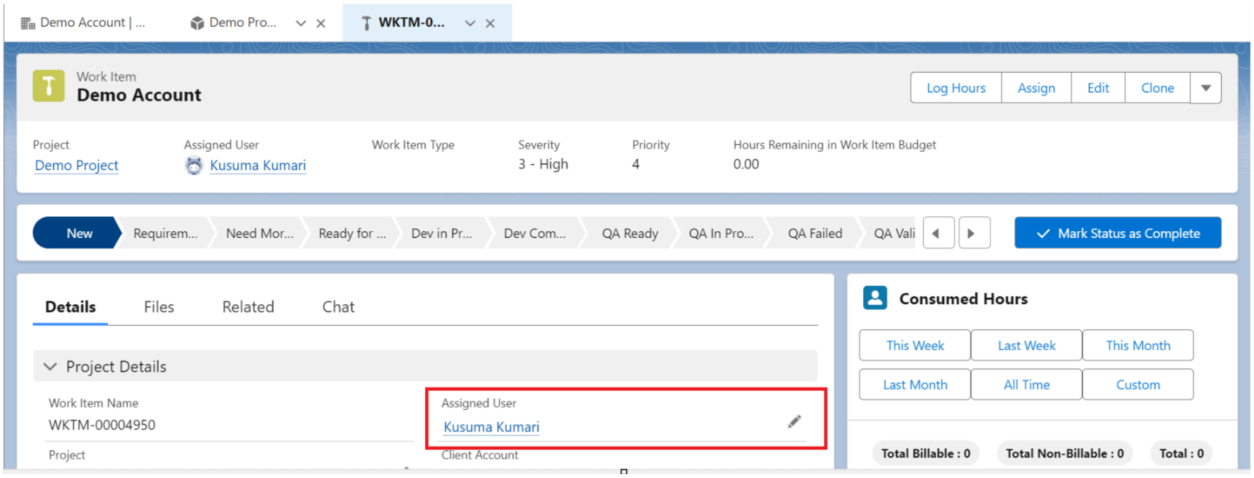
- Select the user from the picklist of the **Select User** field, the role of the selected user in the **Select Role** field.



- Click **Save**.
- On the next screen, select the radio button of the **Action** column for the user to whom the work item is to be assigned.



- Click **Save** to assign the work item to the user.



10. Set Up Salesforce With Google Single Sign-On (SSO)

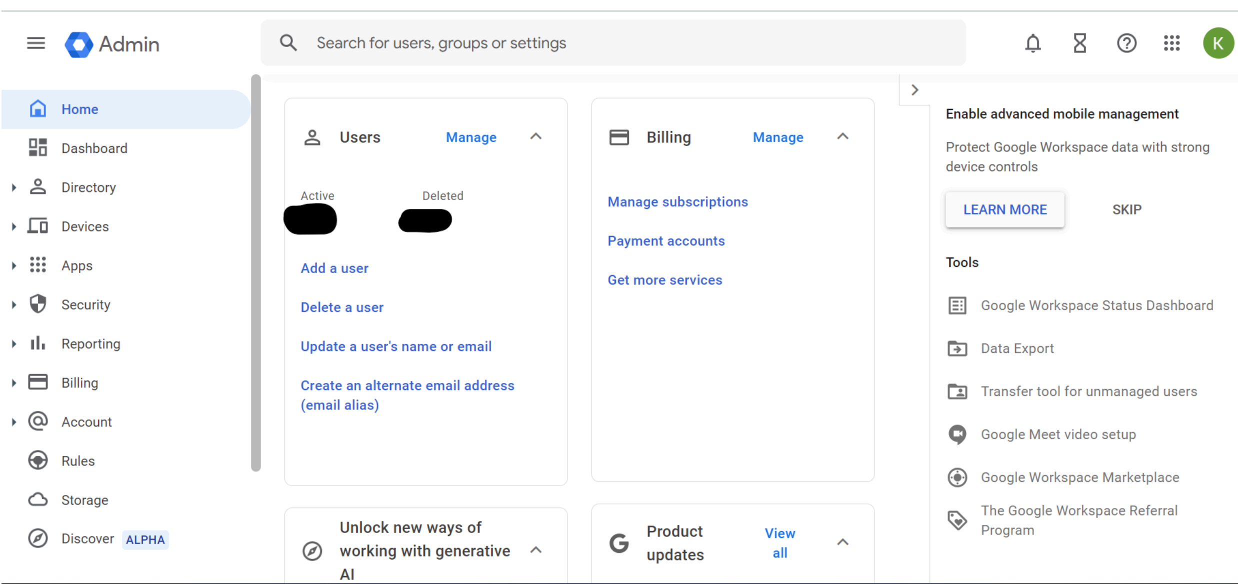
Pre-requisites:

1. You must be a GSuite and a Salesforce admin to accomplish this SSO.
2. You should have already enabled and set up **"My Domain"** on your Salesforce.

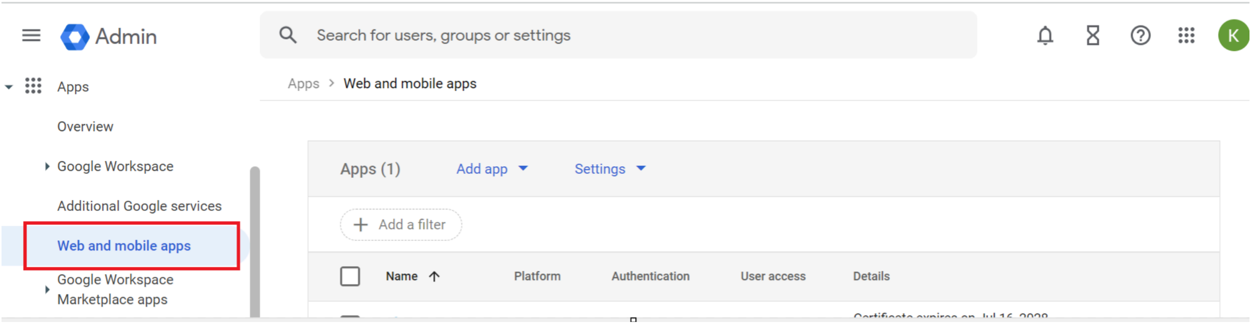
Instructions:

Within Google/GSuite Admin Console

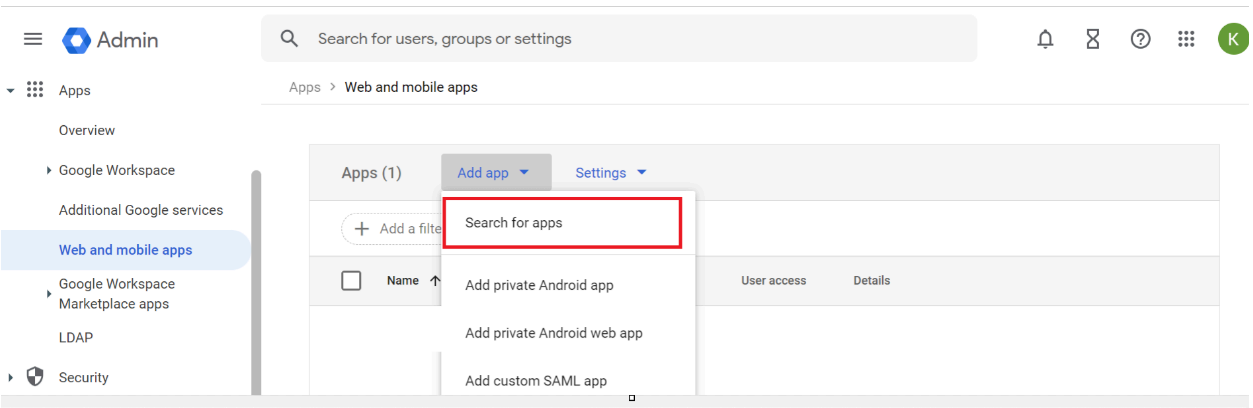
Step 1: Go to your GSuite Admin Console and login: https://admin.google.com/



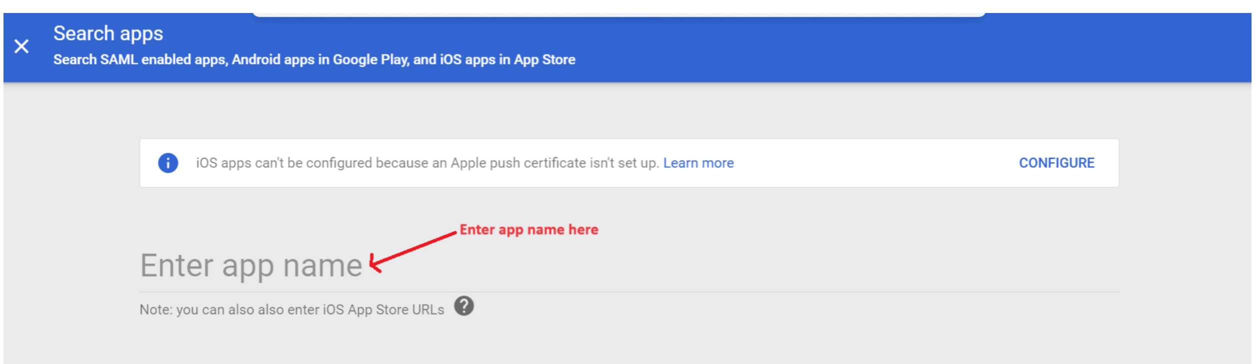
Step 2: Go to APPS and click **"Web and mobile apps"** .



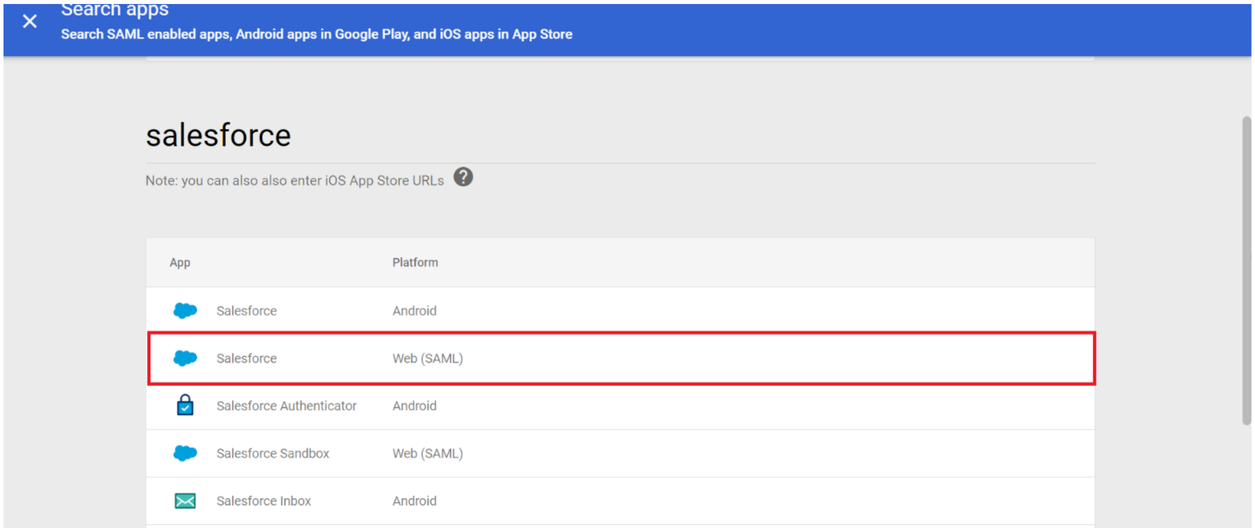
Step 3: Select **Search for apps** under the “Add App” drop-down.



Step 4: Type **salesforce** on the input field.

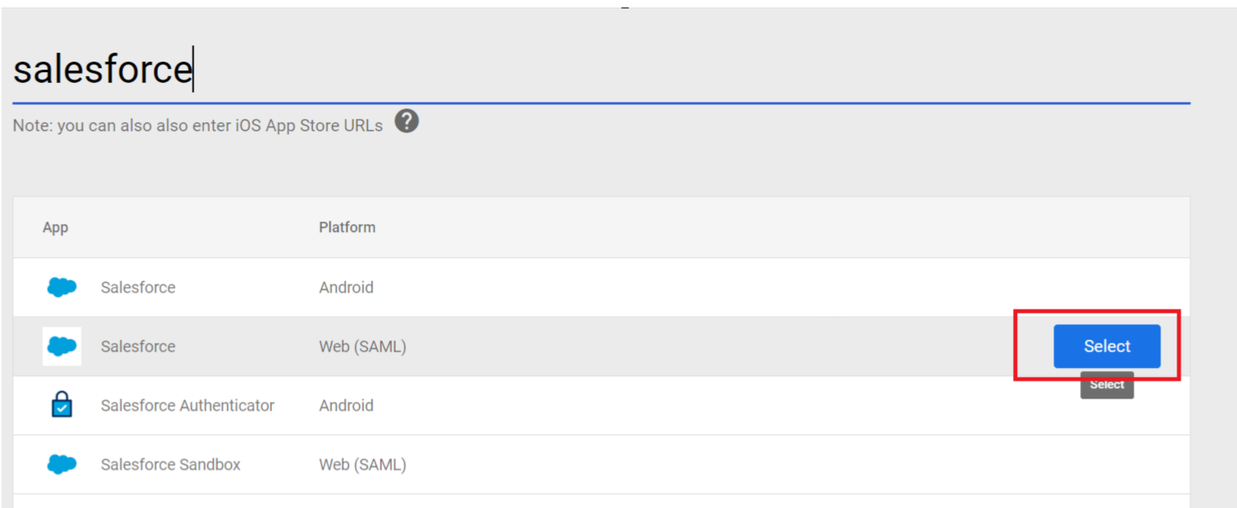


Step 5: Select the Salesforce or Salesforce Sandbox app (depending on the org you are connecting) with Web(SAML) under the platform column.

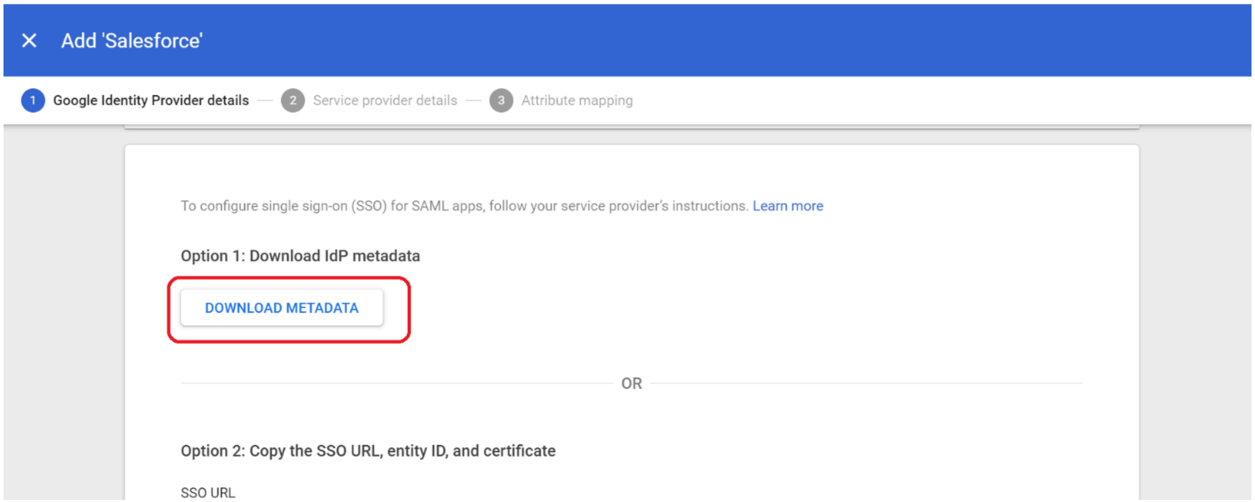


Step 6: click on the **Select** button of the app.

To see the select button, move your cursor to the end of the selected app row.



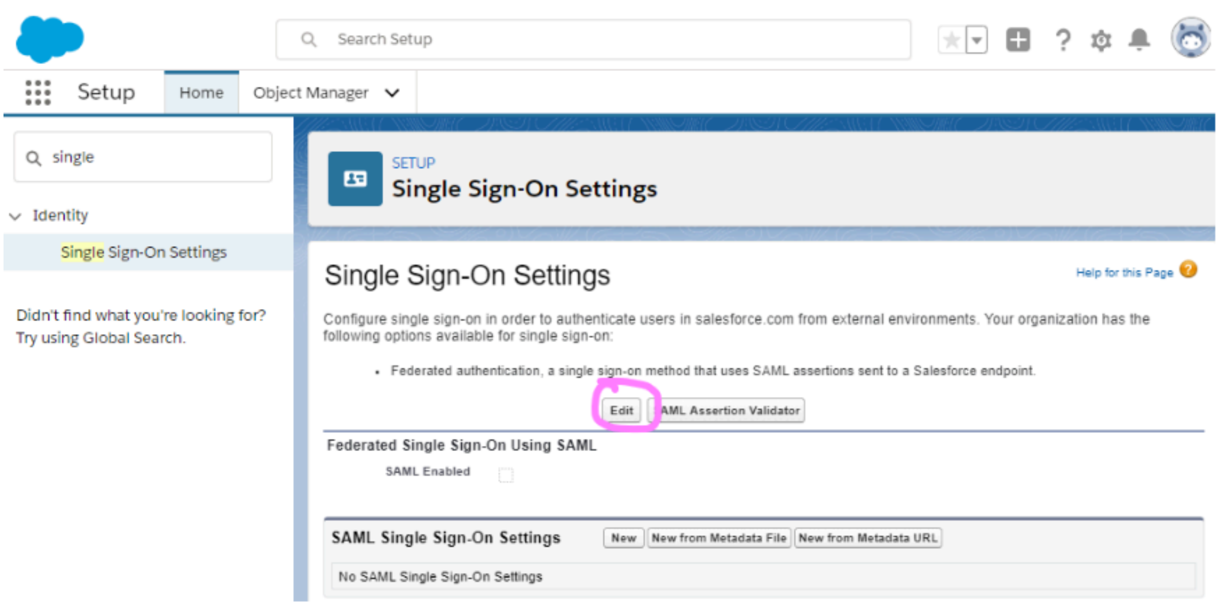
Step 7: On the following screen, download IDP metadata using the “1st option” (see red highlight on screenshot below).



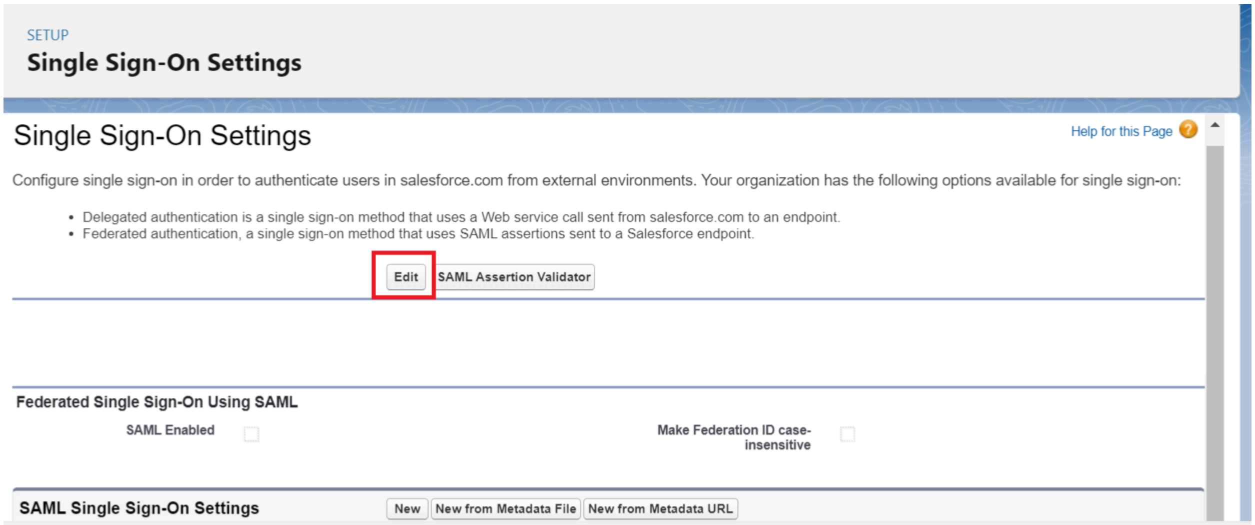
Step 8: Press **Continue** and leave where you are as it is, and open a new tab to log in to the Salesforce account. You'll come back to it later.

Within Salesforce

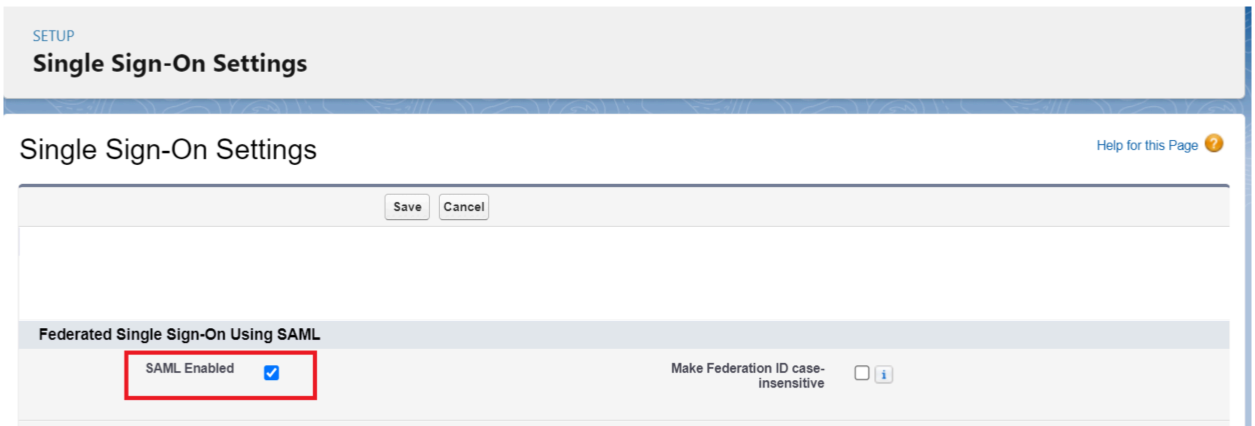
Step 9: Log in to the salesforce org to set up SSO, navigate to Setup – Identity – Single Sign-On Settings (or, within Setup, type "Single" into either of the search bars).



Step 10: Click **Edit**.

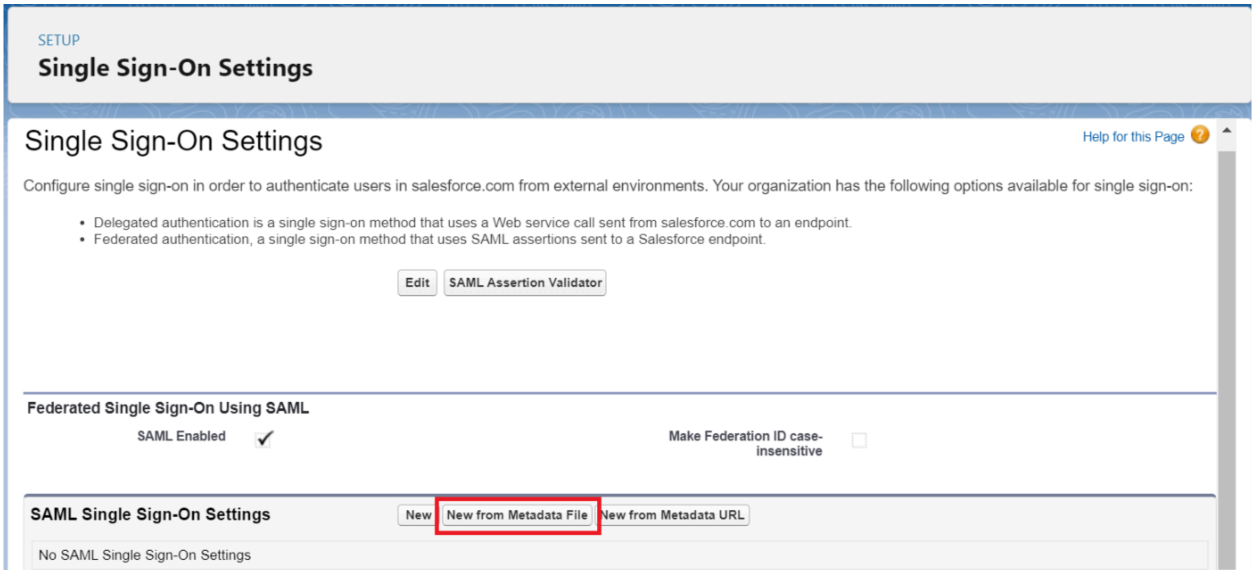


Step 11: Check the **SAML Enabled** checkbox and click **Save**.

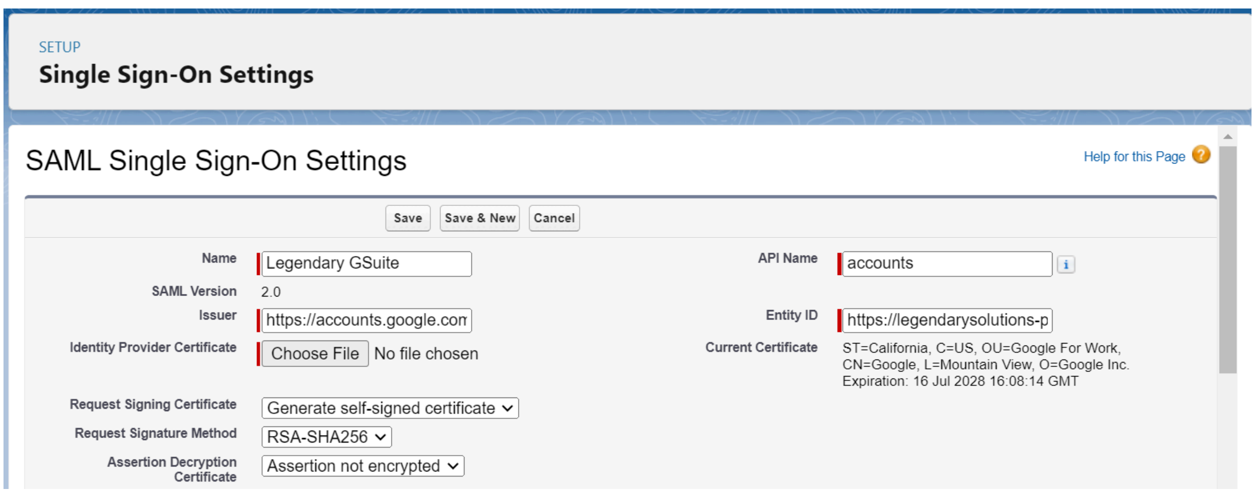


Step 12: You'll be returned to the screen of Step 10.

Step 13: Click **New from Metadata File**, choose the GoogleIDPMetadata XML file you downloaded in Step 7 and then click **Create**.

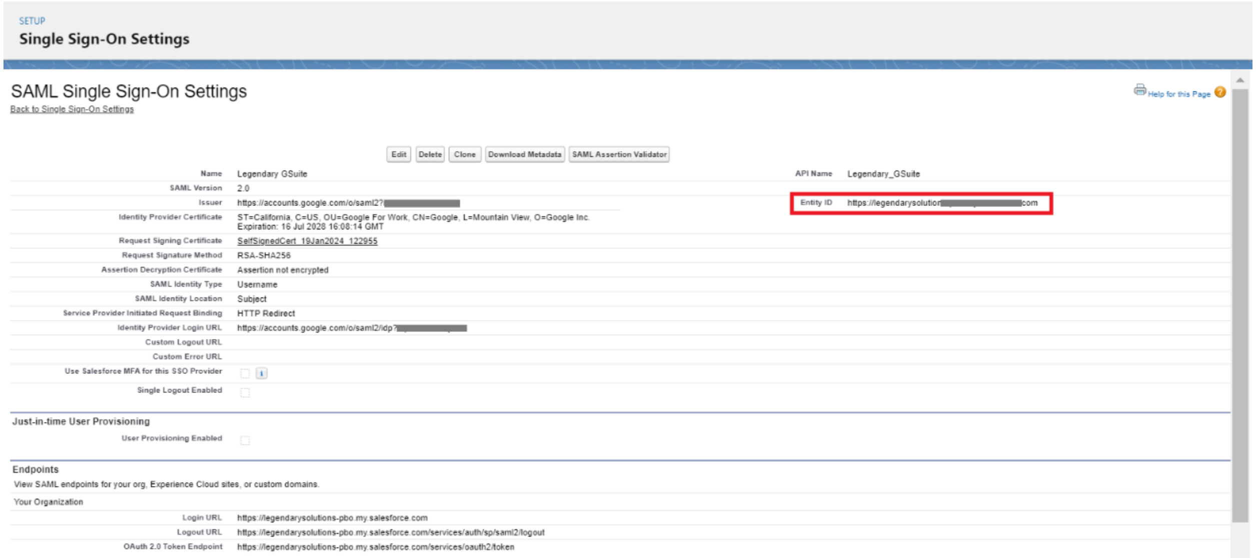


Step 14: On the next screen (see screenshot below) you will want to change the "Name" and "API Name" to something meaningful; this will also be displayed to your end users who are logging in. Don't worry too much though – you can change the Name and API Name later on, without impacting anything else.



Step 15: Click **Save**.

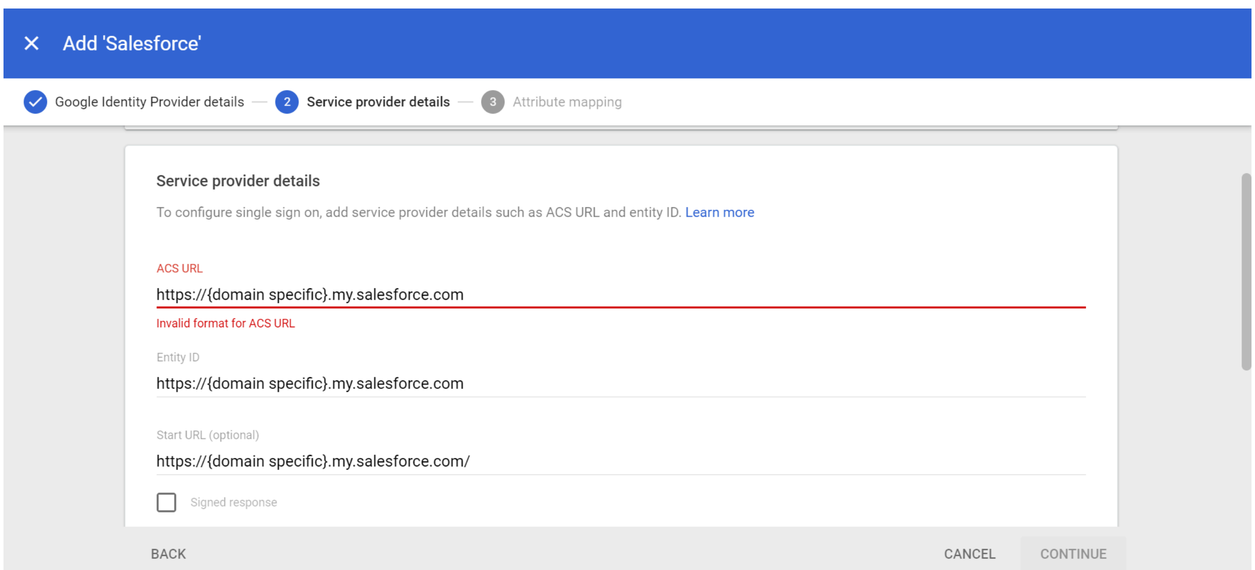
Step 16: This is the screen that appears when you press "Save". Make a note of the **Entity ID** (copy it to Notepad/computer memory) as you'll need it for Step 18.



Within Google/GSuite Admin Console again

We’re continuing from **Step 8** here,

Step 17: You’ll see a screen like this:



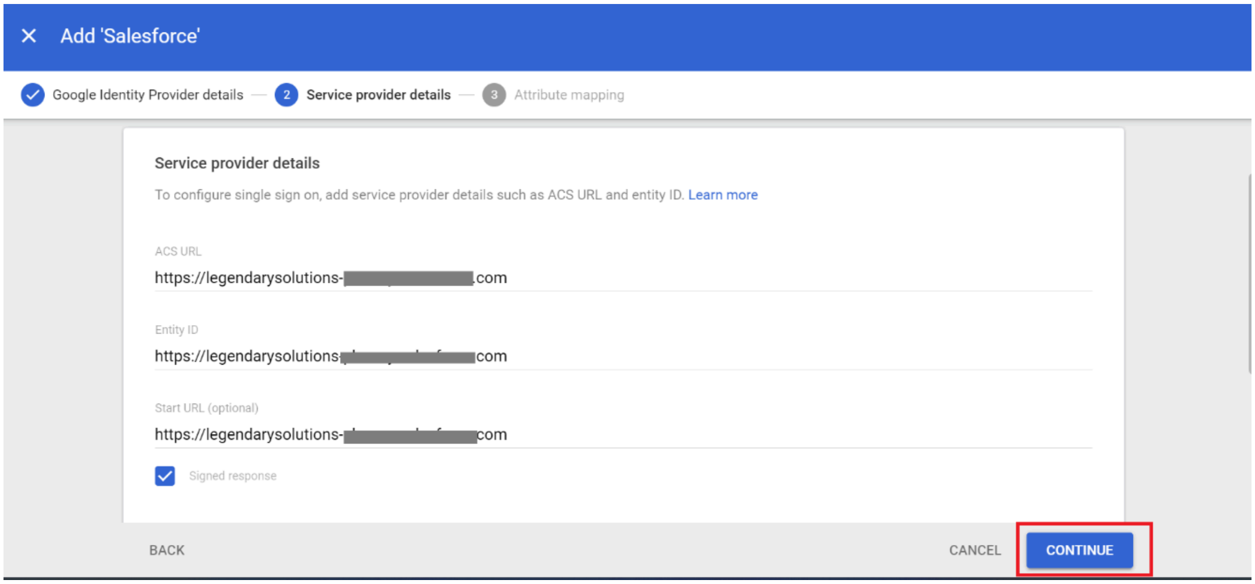
Step 18: These are the details you’ll need to fill in:

- ➔ ACS URL: The “Entity ID” from the previous SAML Single Sign-On Settings screen (see Step 16).
- ➔ Entity ID: The “Entity ID” from the previous SAML Single Sign-On Settings screen (see Step 16).
- ➔ Start URL: The “Entity ID” from the previous SAML Single Sign-On Settings screen (see Step 16).

➔ Signed Response: Yes / Tick / True.

Note: In step 16, make sure your Entity ID field is copied EXACTLY from the Entity ID field in your Salesforce SAML configuration.

Step 19: It will look something similar to the screenshot below (just with your own org's details):

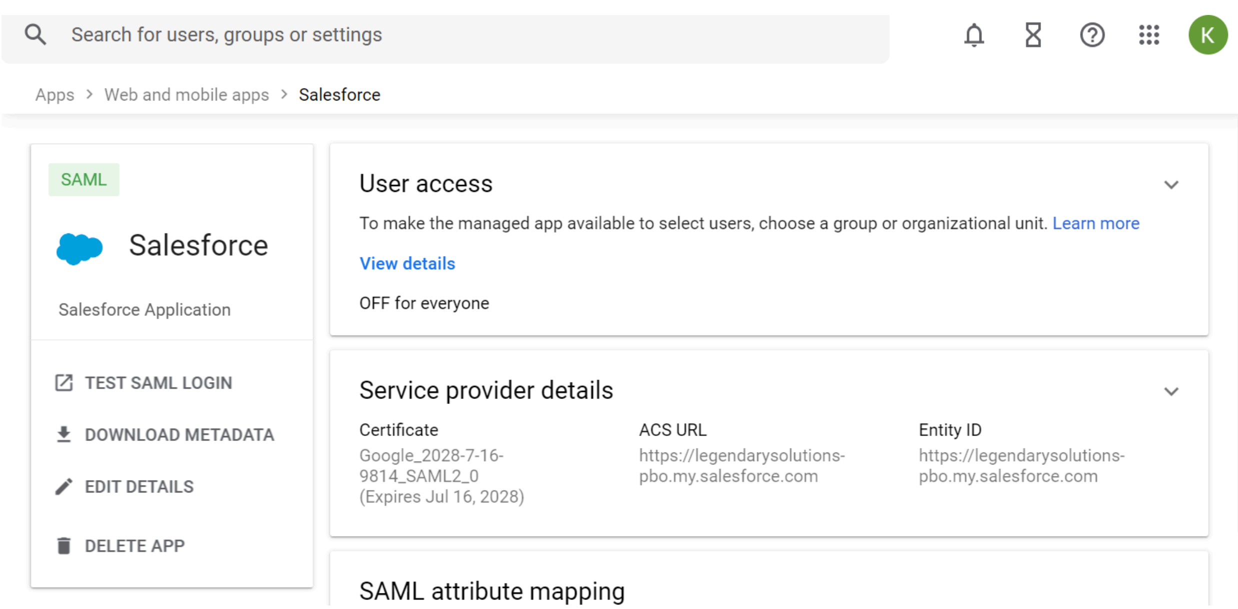


Step 20: Click **Continue**.

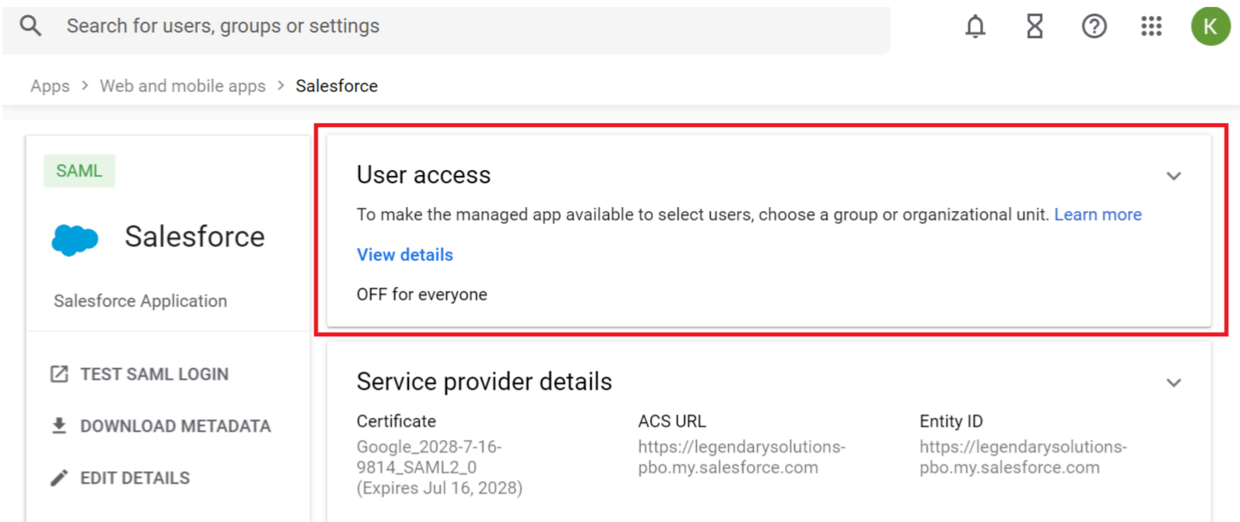
Step 21: In the following screen, you can map the attributes of Gmail with salesforce as per your requirement. Otherwise, you can skip this step as it is optional.

Step 22: Click **Finish.**

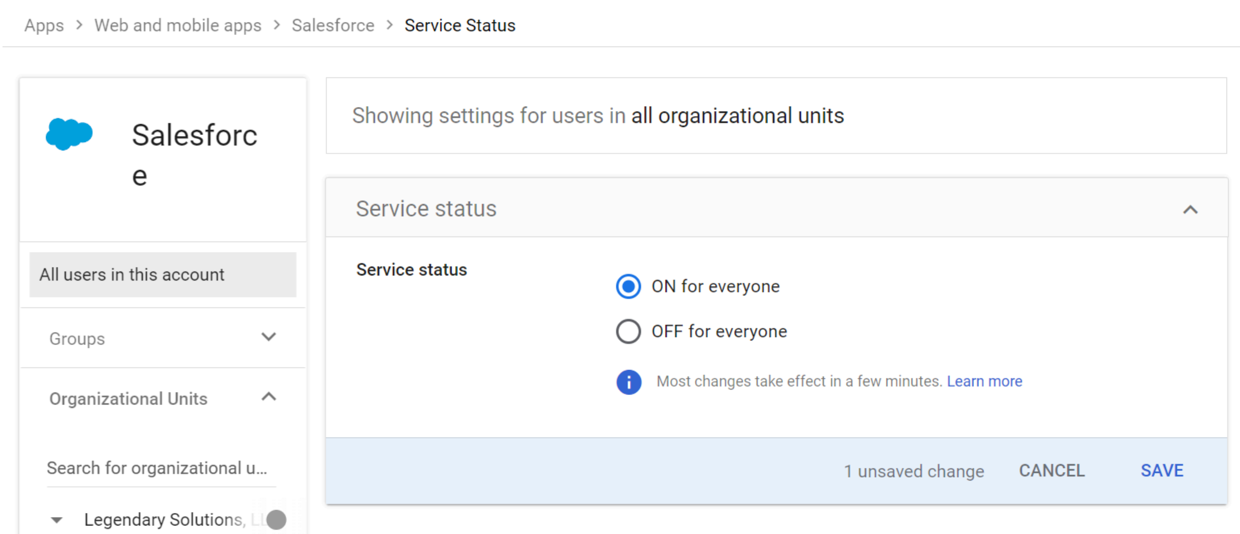
Step 23: After pressing "Finish", you will be redirected to the below screen:



Step 24: Click **User Access,** and select **ON for everyone.**



Step 25: Press **Save**.

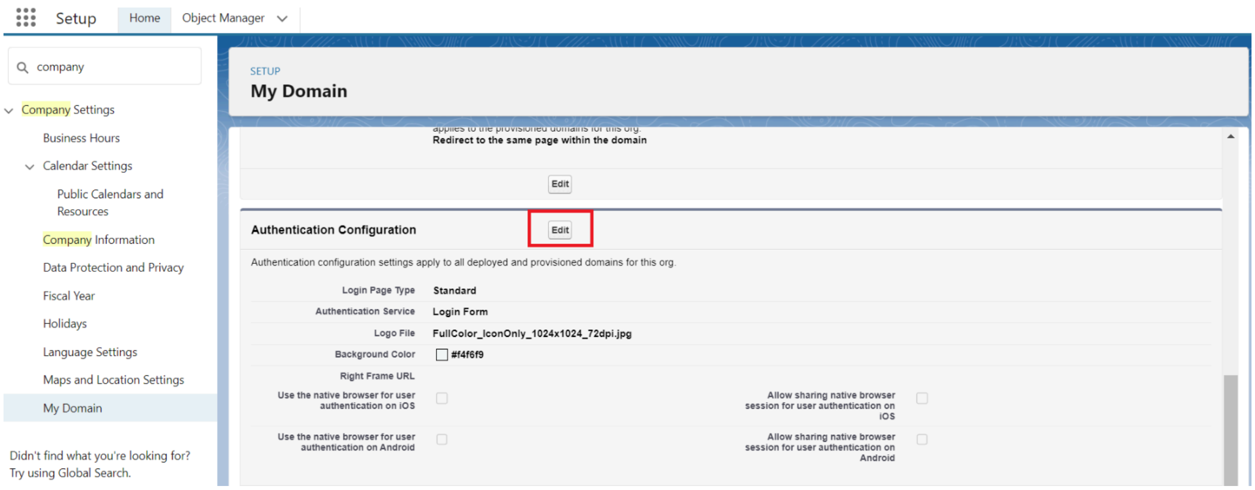


Step 26: This change **can take up to 24 hours**, even for small organizations. You still need to complete a few more steps (see below).

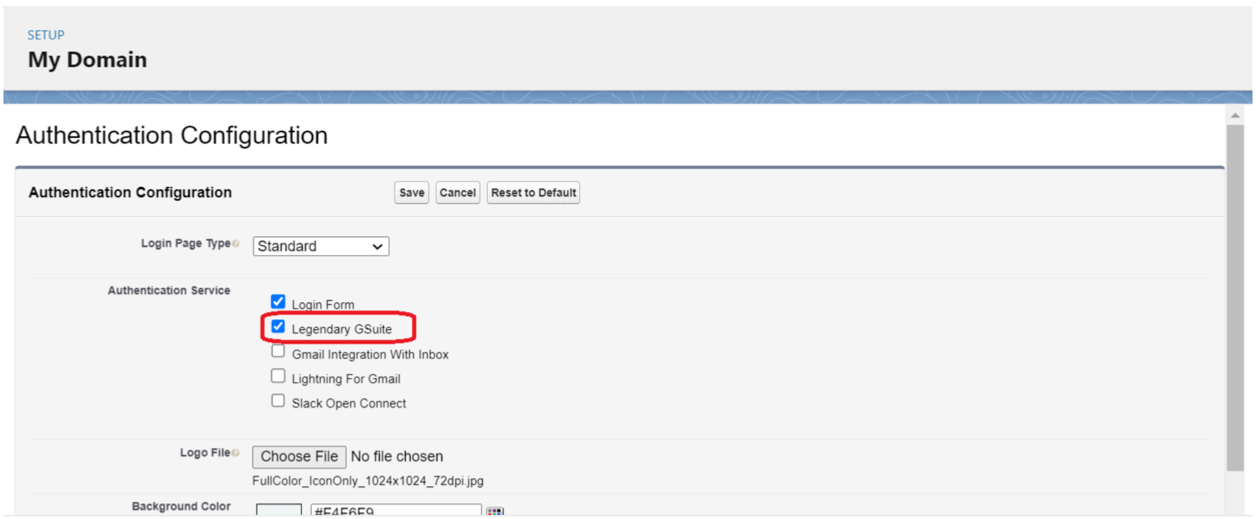
Back in Salesforce

Step 27: Navigate to Setup – Company Settings – My Domain.

Step 28: Click **Edit** by "Authentication Configuration" (highlighted in the screenshot below).



Step 29: Tick the **Name** that you chose earlier in step 14.



Step 30: Untick **Login Form** in the above screenshot if required.

Tip: Unticking Login hides the "login" box (asking for Salesforce username and password) from the user's initial screen.

Step 31: Actually **we're done** but do read the Epilogue as annual "maintenance" will be required.

Epilogue

After a period of time, perhaps one or two years, you'll receive an email about "SFDC Expiring Certificate Notification" in your inbox.

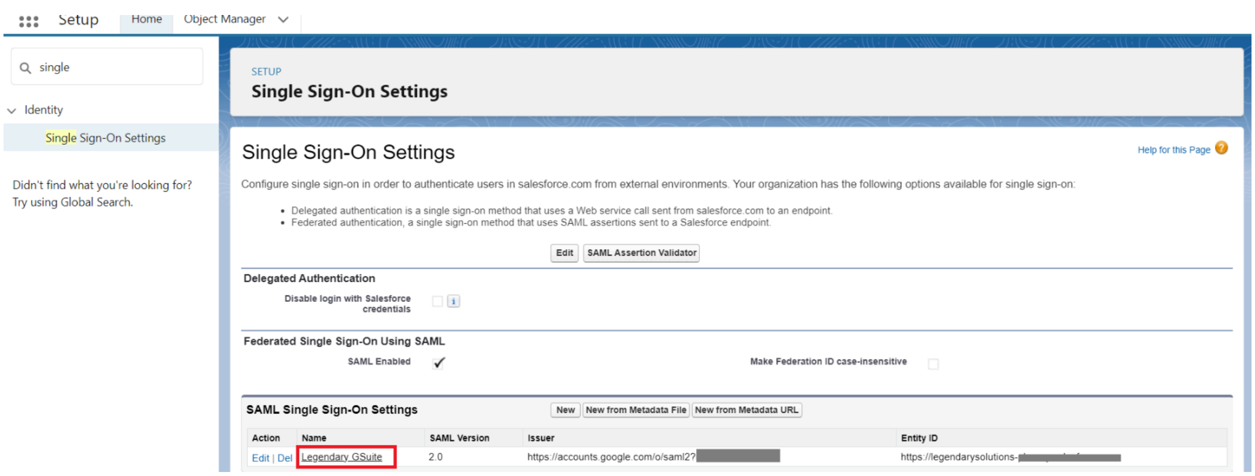
From: **Do not reply** <noreply@salesforce.com>
Date: [redacted]
Subject: SFDC Expiring Certificate Notification
To: [Salesforce System Administrators]

You have one or more certificates in your Salesforce org [redacted] that will expire soon.
Review the list below and visit Certificate and Key Management from Setup to make an update.

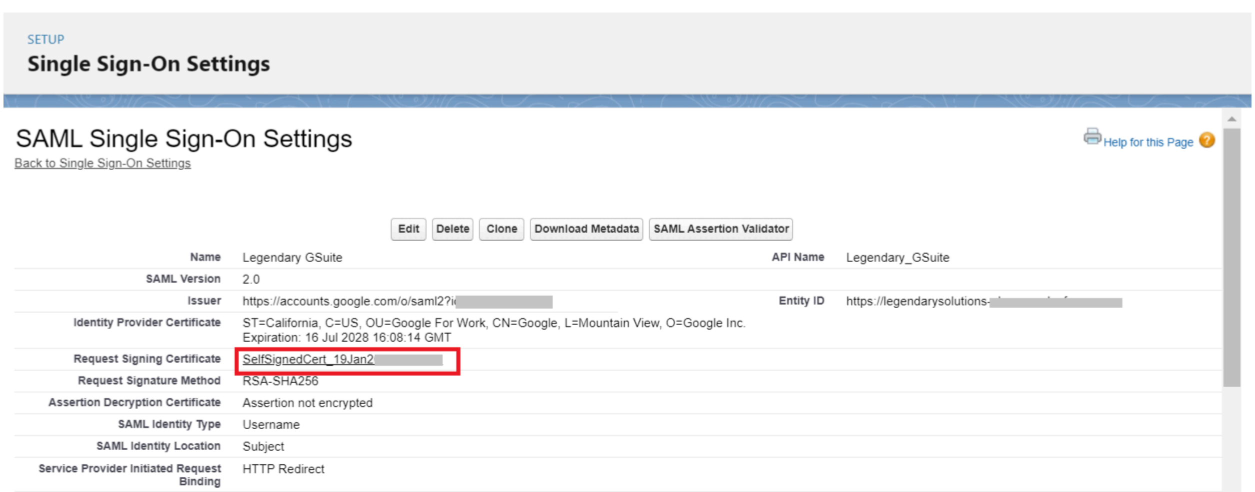
- Self Signed [redacted] Self-Signed, expires on [redacted] Warning: This certificate will expire in 30 day(s).

It is easy to fix!

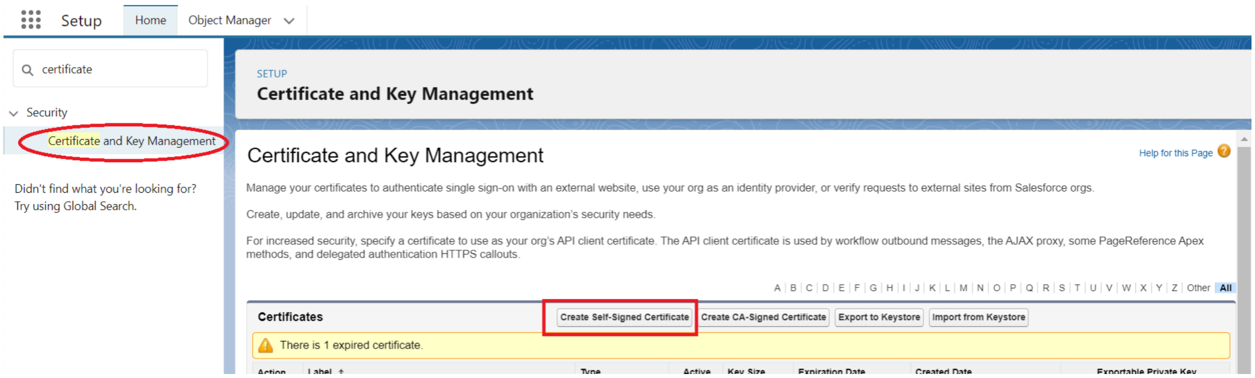
Step 1: Within Salesforce's Setup, go to Single Sign-On Settings within Setup, then click on the SAML Single Sign-On Settings you created previously.



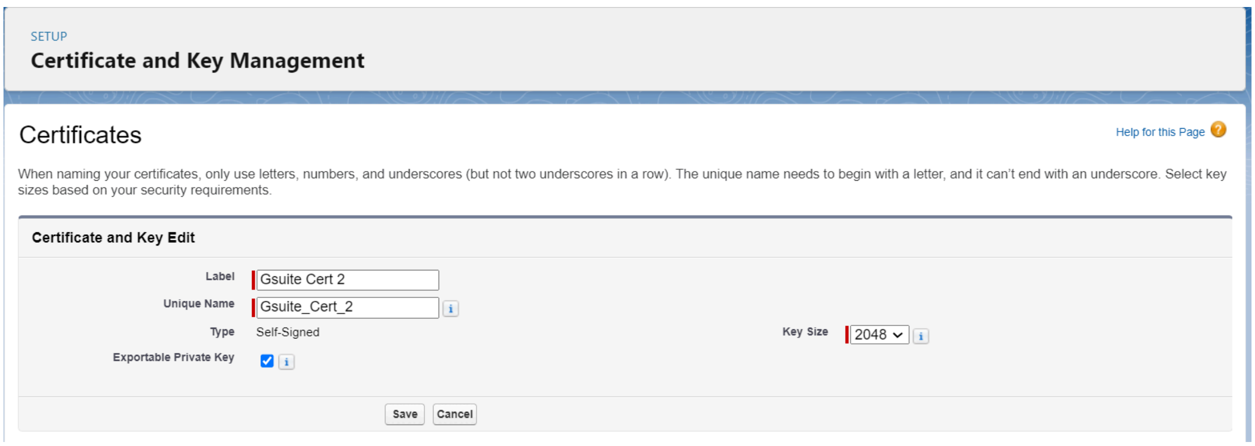
Step 2: Check the certificate name matches the one you received an email about.



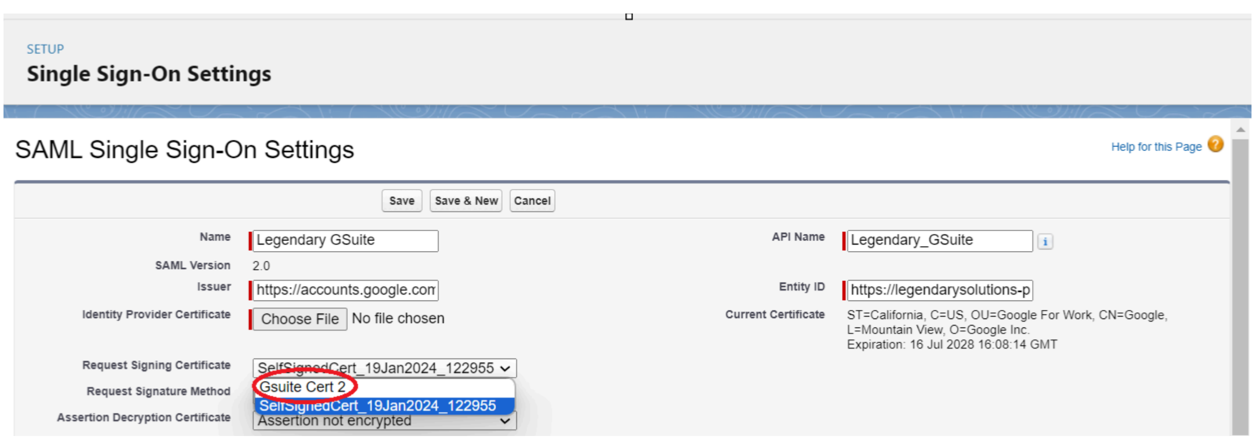
Step 3: Go to Certificate and Key Management (within Setup) and click “Create Self-Signed Certificate”.



Step 4: Now create your new self-signed certificate (and give it a better name!); click “Save” at the end.



Step 5: Pop back to the SAML Single Sign-On Settings screen in Step 2, click “Edit” and choose your new certificate.

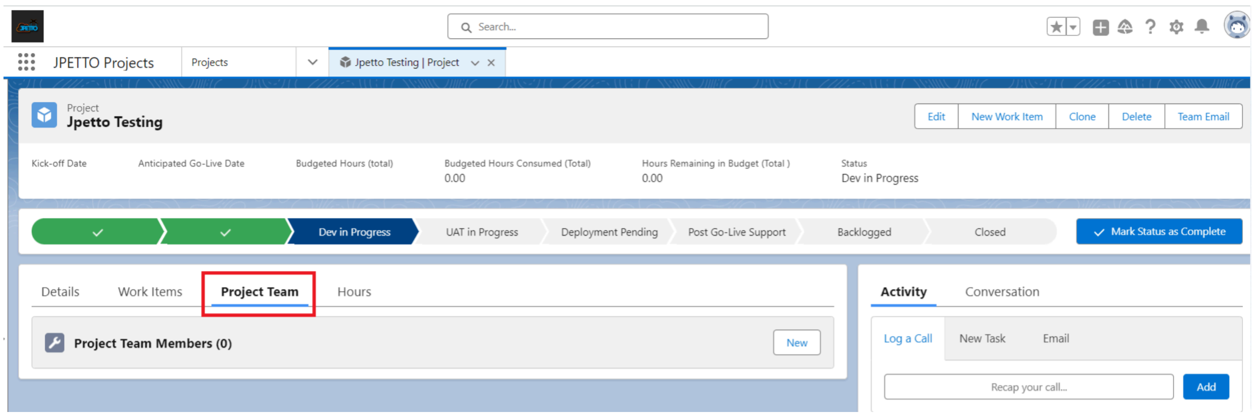


Step 6: Press “Save” and it's all done!

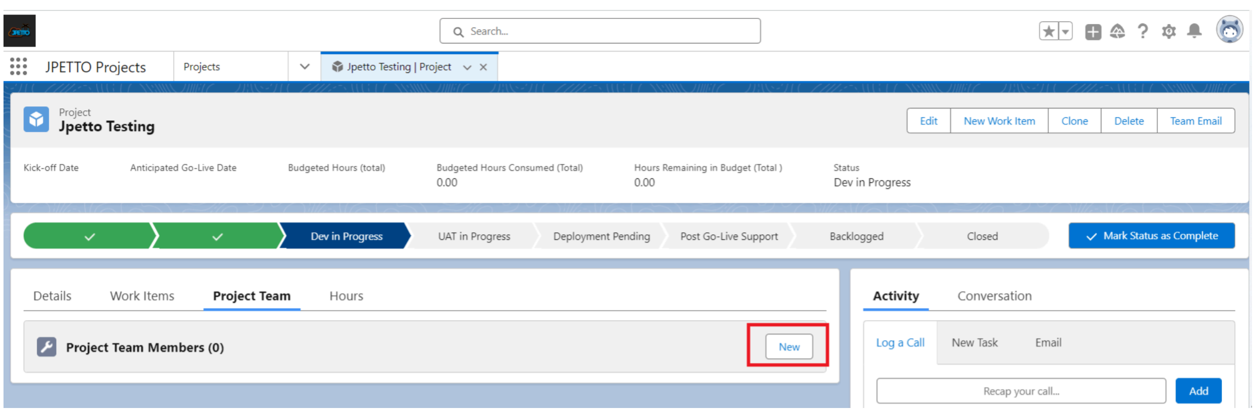
11. **Share Access from Project Team Members**

- Admins/Project Managers can share access to the project for users by adding users as project team members(PTM).

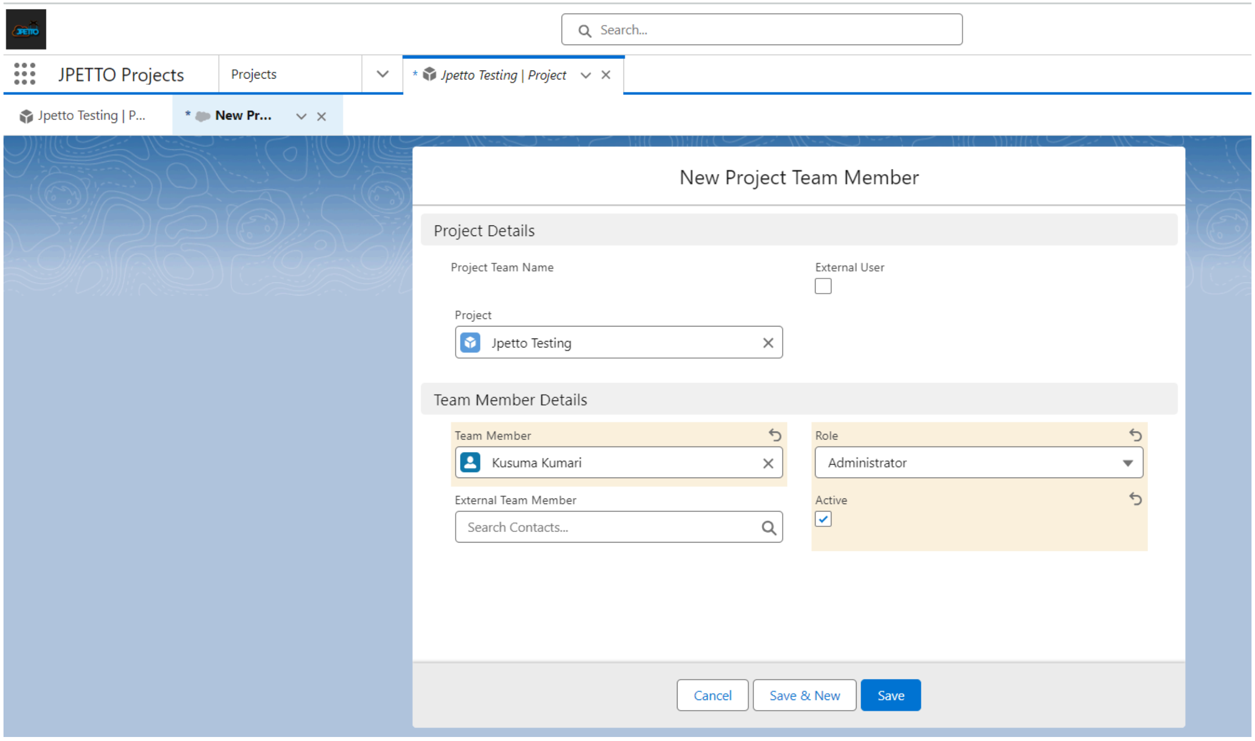
1. **Share Access when creating PTM:**
    - Go to the projects tab in the Jpetto.
    - Select the project to which the user needs access.
    - Go to the **Project Team** tab on the project record page.



    - Click the **New** button on the Project Team Members related list.



    - Fill out the required details and select the **Active** checkbox as shown in the figure below.



- Click **Save**.
- Once the record is saved, the user will get access to the project and related work items.

2. **Share Access by updating PTM:**
    - Share access by updating the PTM: is helpful to reactivate/reshare access for inactive project team members.
    - Go to the project, the user needs access
    - Select the project team member from the list to whom the project access needs to be reshared. Make sure the active checkbox is **false** for the selected project team member.
    - Check the active checkbox to **true** and save the record.
    - Once the record is saved, the user will get access to the project and related work items.

12. Disable Show Error Message on Delete WorkItems flow

- In the Jpetto Package a flow named **Show Error Message on Delete WorkItems** is created to avoid deleting Work items, if timesheet entries (Logged hours) are created on them.
- This flow is not mandatory, end users(Generally admins of the organization) can decide whether they want to run this flow or not as per their business requirements.

- To enable the flow to run, follow the below path:
  Set Up ⇒ **Custom Settings** ⇒ **Flow Settings** ⇒ **Manage** ⇒ **New** ⇒ Enable the **Run Flow** checkbox.
- To disable the flow to run, follow these steps:
  Set Up ⇒ **Custom Settings** ⇒ **Flow Settings** ⇒ **Manage** ⇒ **New/Edit** (If already record exists) ⇒ Disable the **Run Flow** checkbox.

13. Communication Templates for Batch Failures

- As there are only a few batch classes(for pay period, Timesheet,.. etc.) available in the Jpetto package, we have added functionality to trigger an email to the Job scheduler if the job fails to run as specified.
- For emails sent, a default template with relevant text is created to notify the scheduler that the job failed to run.
- The Default template we added may or may not match the requirements of your organization; in that case you can add your own template.
- Create your own classic email template for the respective batch class to use and update it in the **Communication Template** custom metadata type as follows:
  Set Up ⇒ **Custom Metadata Types** ⇒ **Communication Template** ⇒ **Manage** ⇒ Select the required batch class record ⇒ Update the API Name of your template in the **Override Template API Name** field.

14. Restrict to add duplicate PTM (Project Team Members)

- An additional functionality added in the package to on/off as per your organization's requirement.
- This helps users in the organization to restrict duplicating the project team members with the same user and same role.
- To take advantage of this functionality go to **Set Up** ⇒ **Flows** ⇒ **Duplicate PTM Check** ⇒ **Activate the flow**

Approval Processes of Jpetto

There are a few approval processes that need to be created in the subscriber's orgs after installation of the **Jpetto** package.

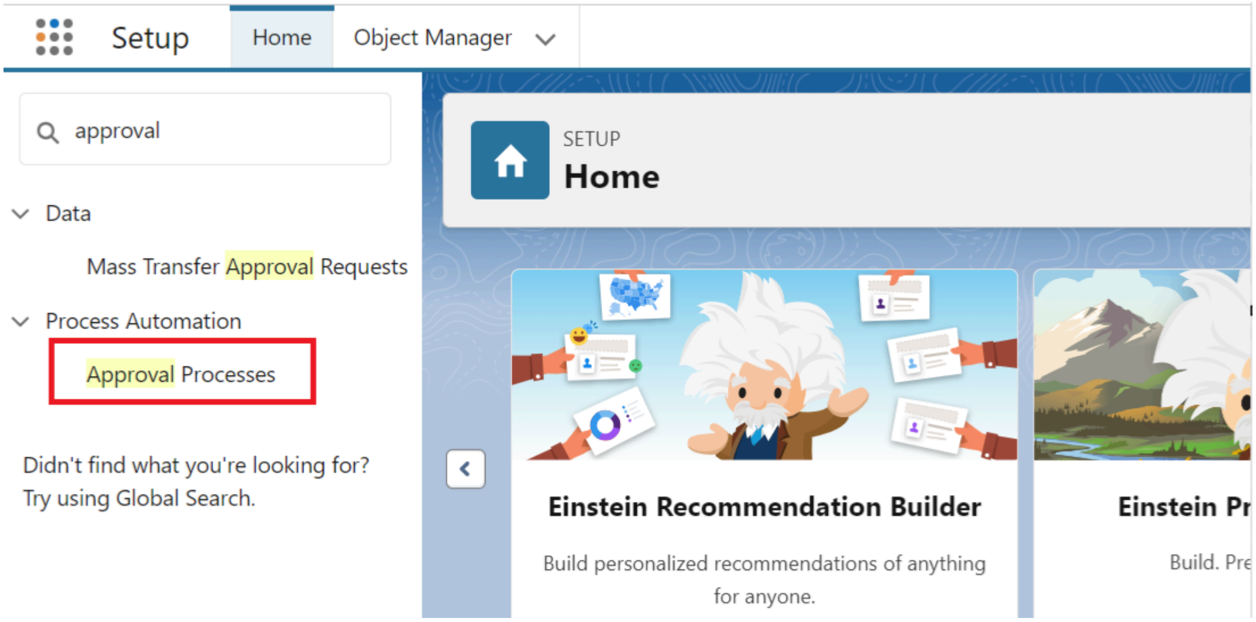
Approval Processes that need to be added in Jpetto are

1. Timesheet Approval
2. Bereavement Leave Approval
3. Vacation Leave Approval

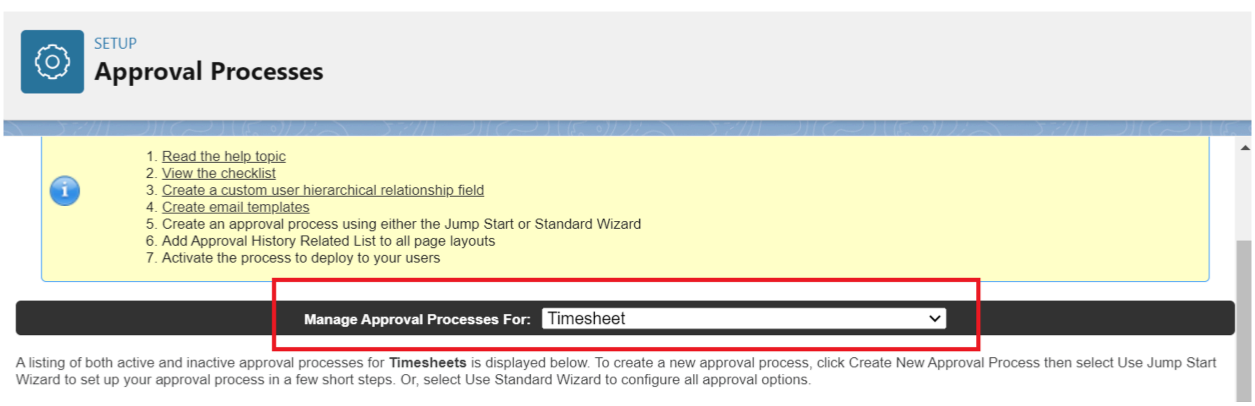
1. Timesheet Approval Process

- This approval process has to be created by the organization admins based on their organization requirements. It helps to send the timesheets for approval to their user's manager or admin after logging hours for a pay period.
- To create this approval process, follow the below steps:

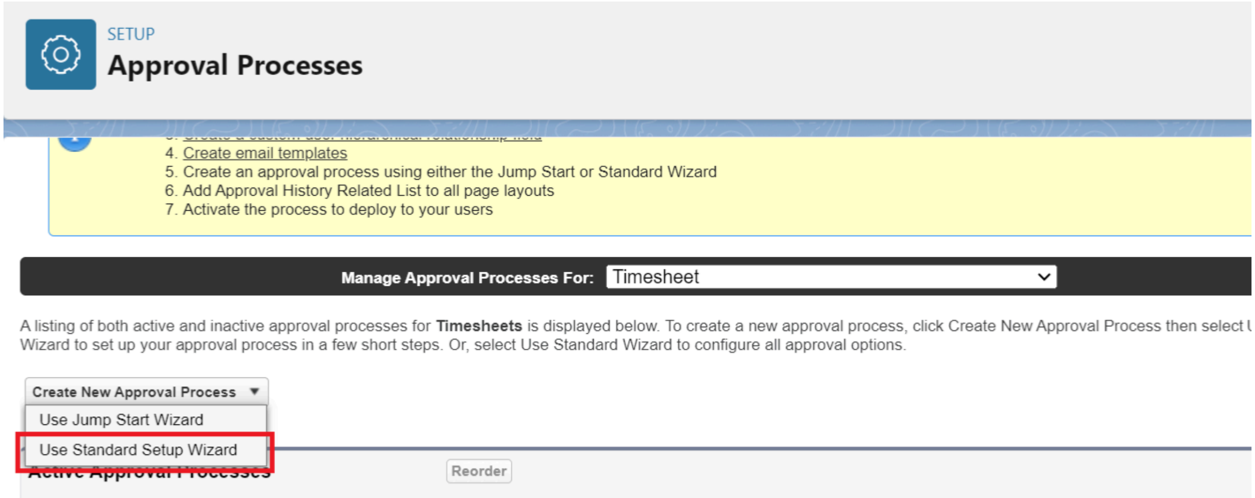
  Step 1: From the **Setup**, in the search box, type the approval process and select the **Approval Processes** from the list below the search box as shown in fig.



Step 2: Select the **Timesheet** object from the picklist of **Manage Approval Processes For**.

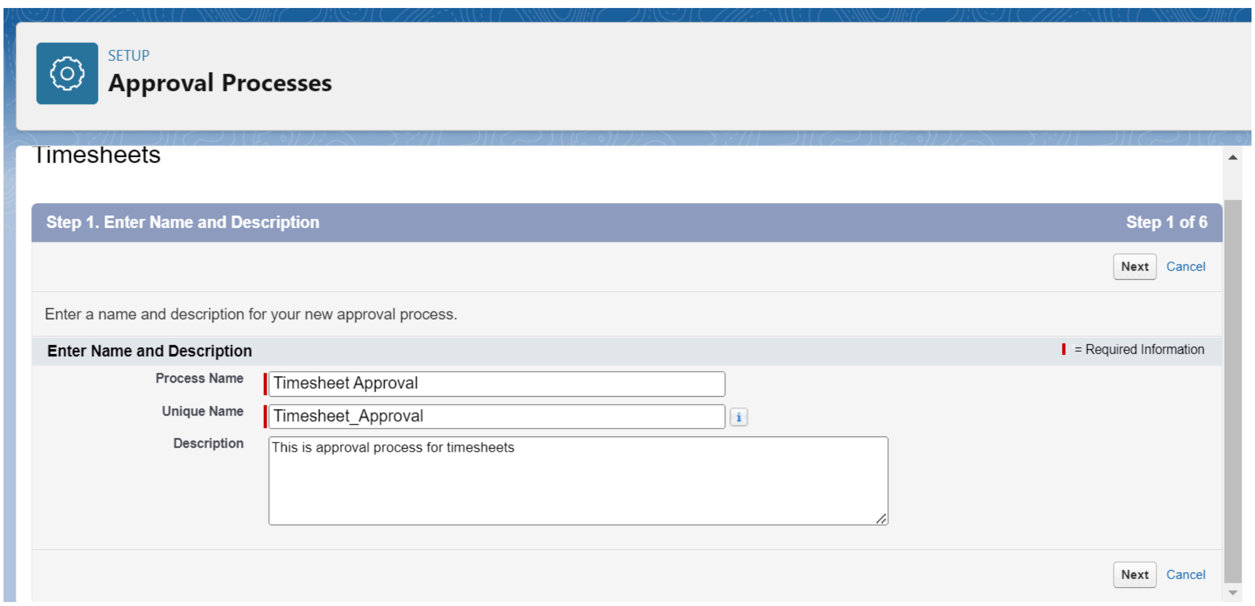


Step 3: Select the **Use Standard Setup Wizard** from the **Create New Approval Process** dropdown list.



Step 4: Add **Timesheet Approval** name on **Process Name** field, **Unique Name** field will be auto-generated.

Step 5: Description is optional, you can add details as required.

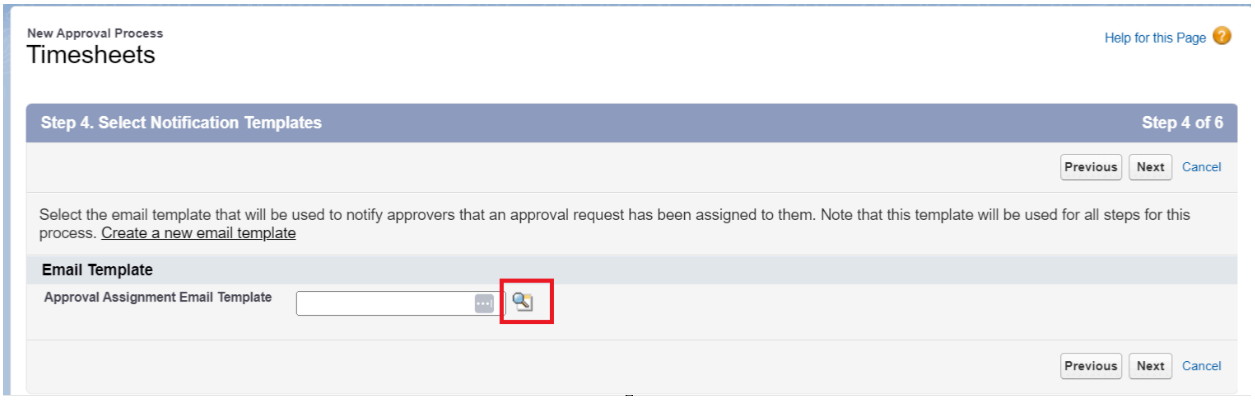


Step 6: Click **Next**.

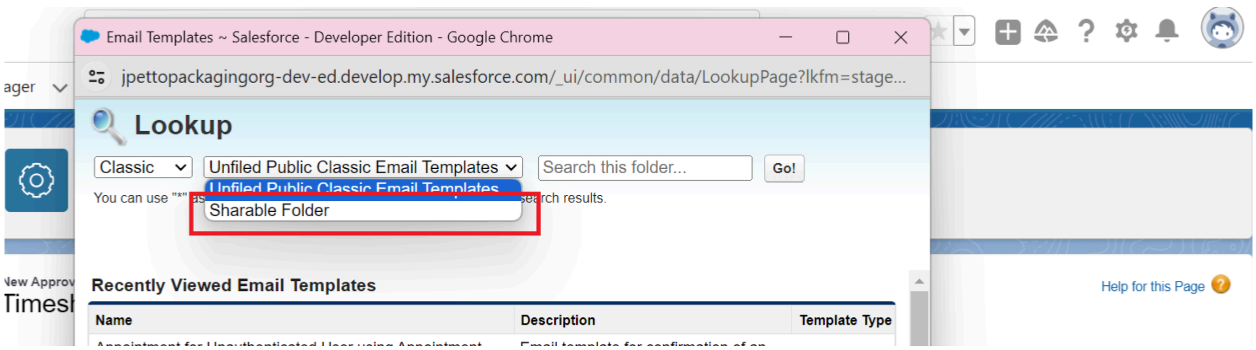
Step 7: Click **Next**.

Step 8: Click **Next**.

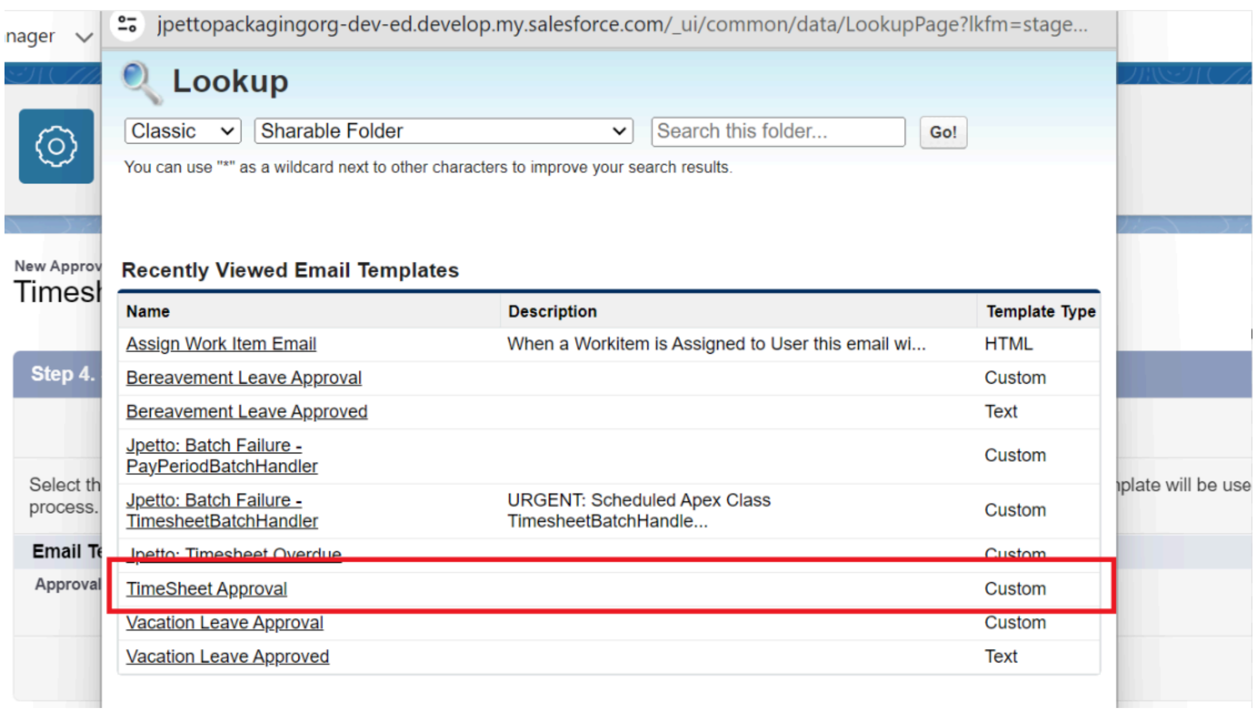
Step 9: Click on the **Look Up** icon of the **Approval Assignment Email Template** field.



Step 10: On the pop-up screen select **Classic** from the drop-down, **Shareable Folder** from the drop-down.

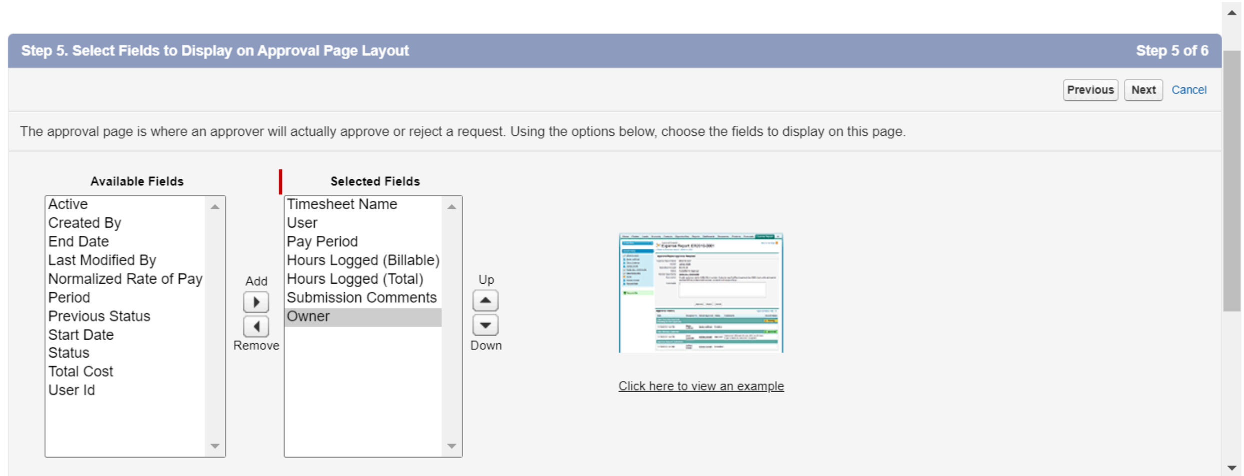


Step 11: Select the **Timesheet Approval** email template from the list.



Step 12: Click **Next**.

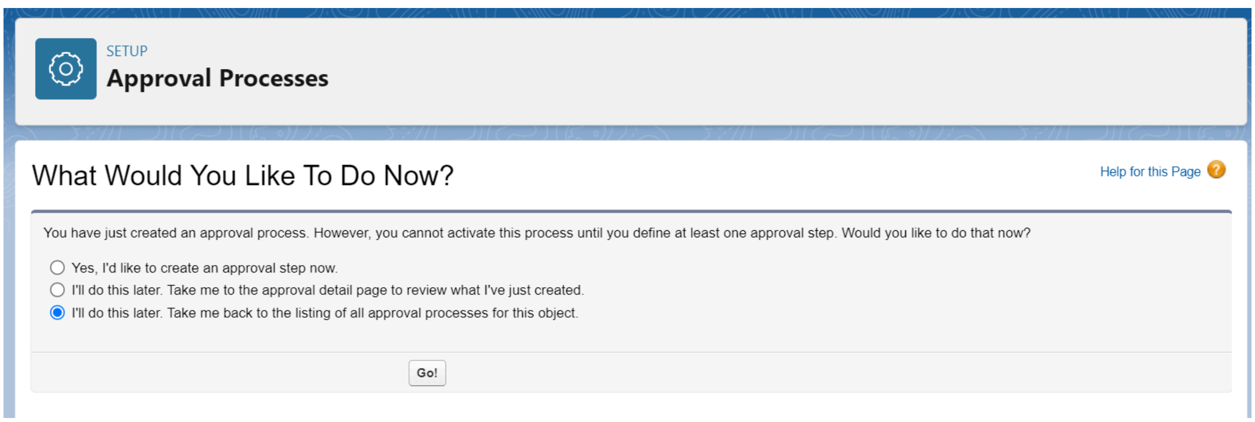
Step 13: Select all the fields you want to display to the approver on the approver page of the timesheet in the **Selected Fields** sections.



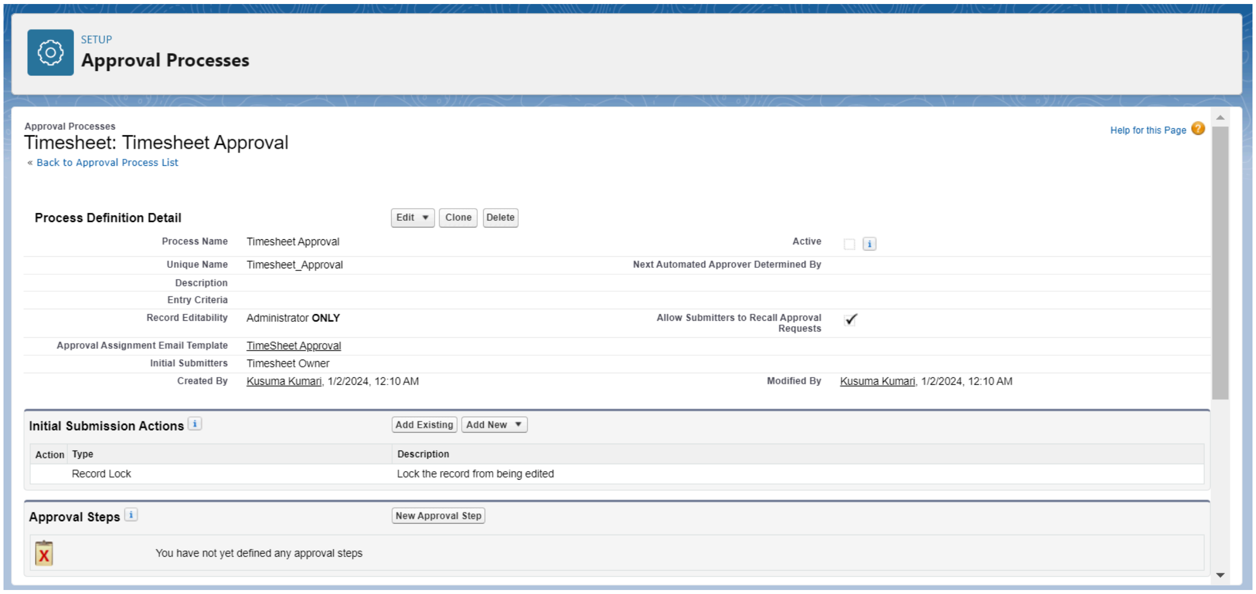
Step 14: Click **Next**.

Step 15: Click **Save**.

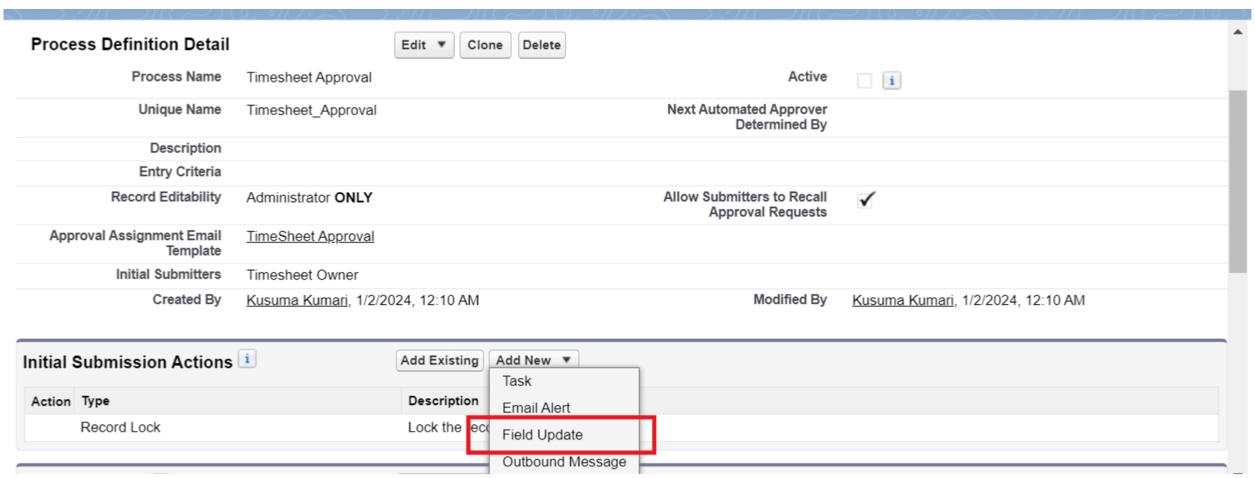
Step 16: Select **I'll do this later. Take me back to the listing of all approval processes for this object** and click **Go**.



Step 17: Go back to the approval process detail page to add actions and approval steps.

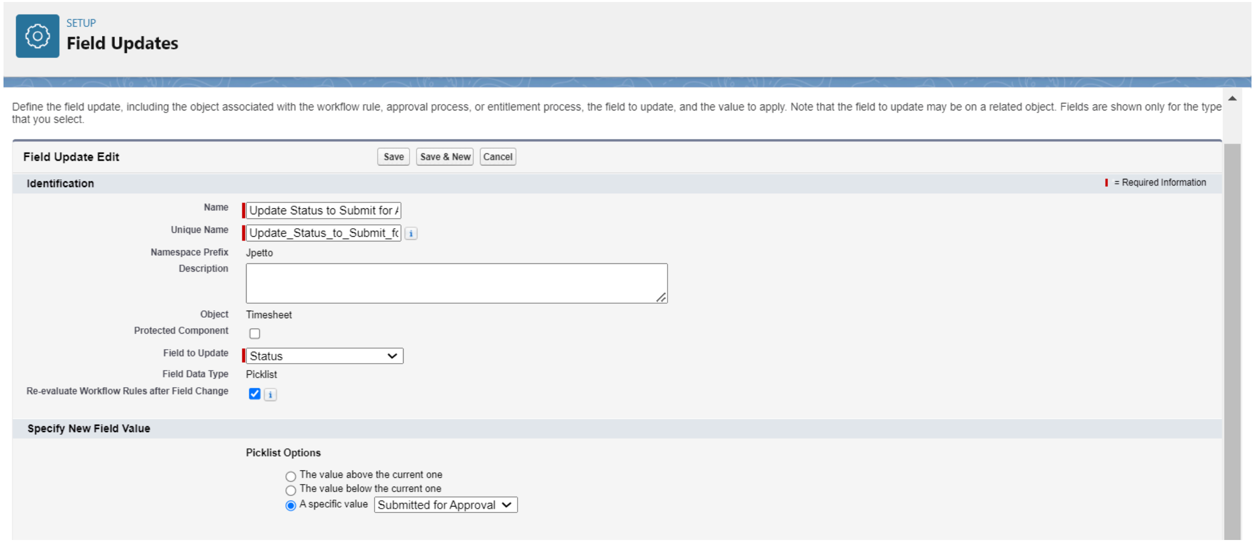


Step 18: Select the **Field Update** option from the **Add New** drop-down of **Initial Submission Actions** section.



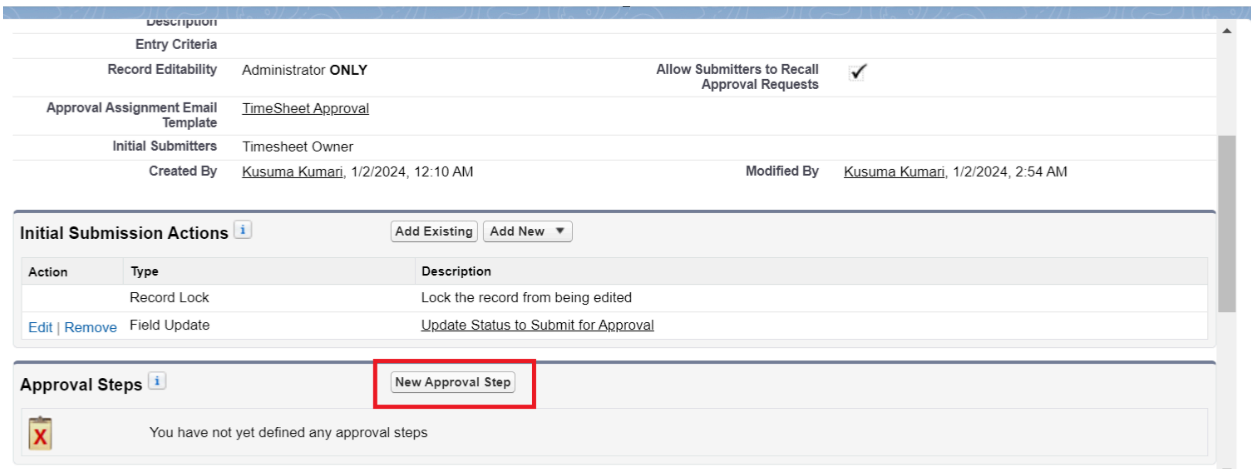
Step 19: Give your preferred name to the field update, select the **Status** field from the picklist of **Field to Update** field, and check the checkbox of **Re-evaluate Workflow Rules after Field Change**.

Step 20: Select **Submitted for Approval** from the picklist of **A specific value** field under **Specify New Field Value** section.



Step 21: Click **Save**.

Step 22: Click the **New Approval Step** button in the Approval Steps section.

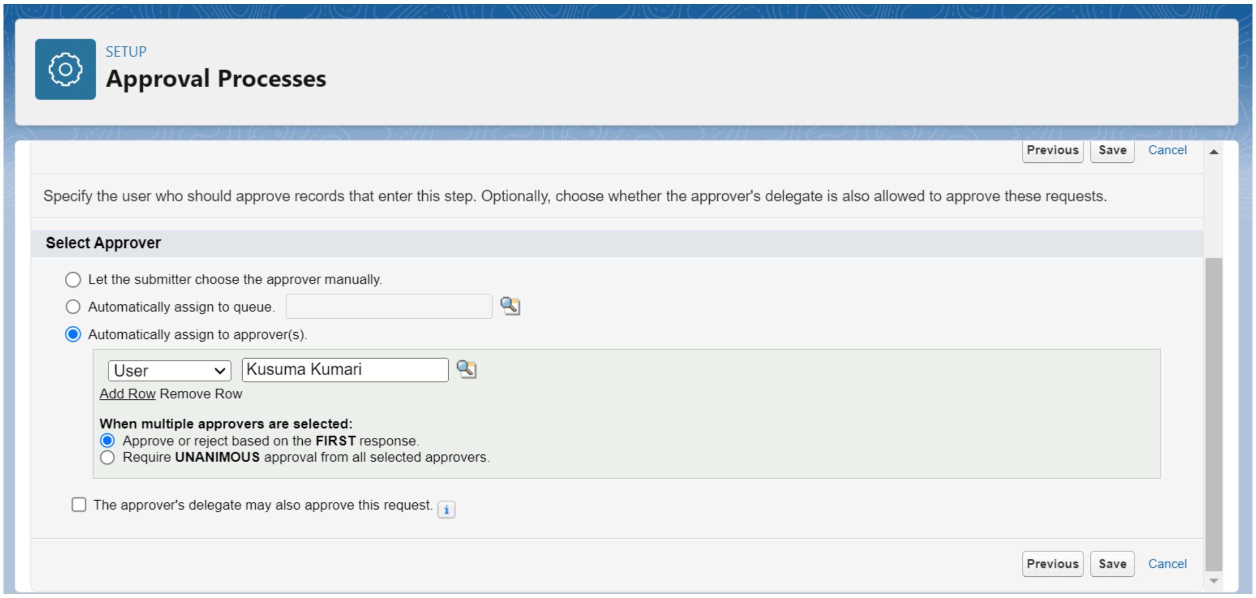


Step 23: Give your preferred name to the approval step and click **Next**.

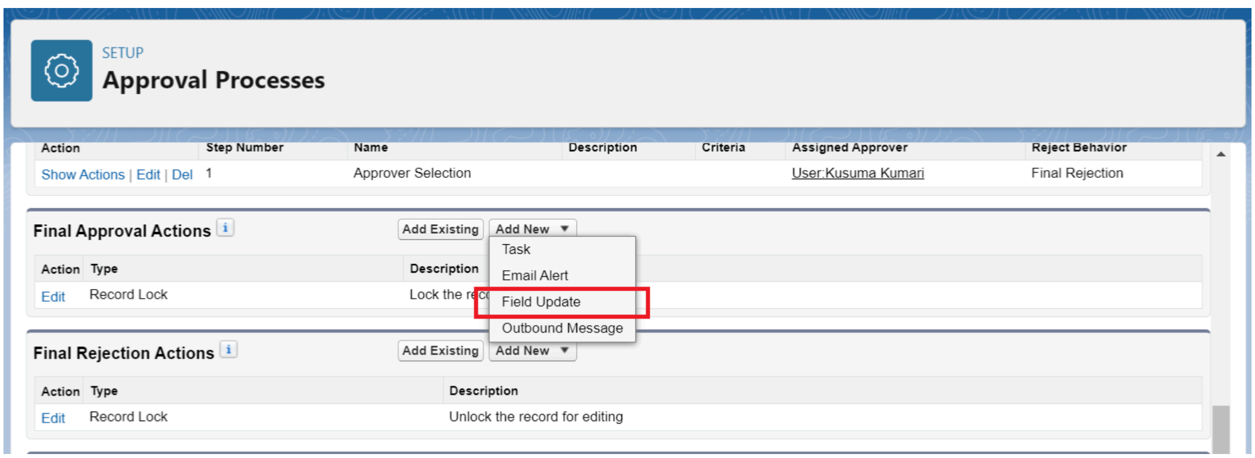
Step 24: Click **Next**.

Step 25: Select the option from the screen as per your business requirement.

Step 26: Click **Save**.

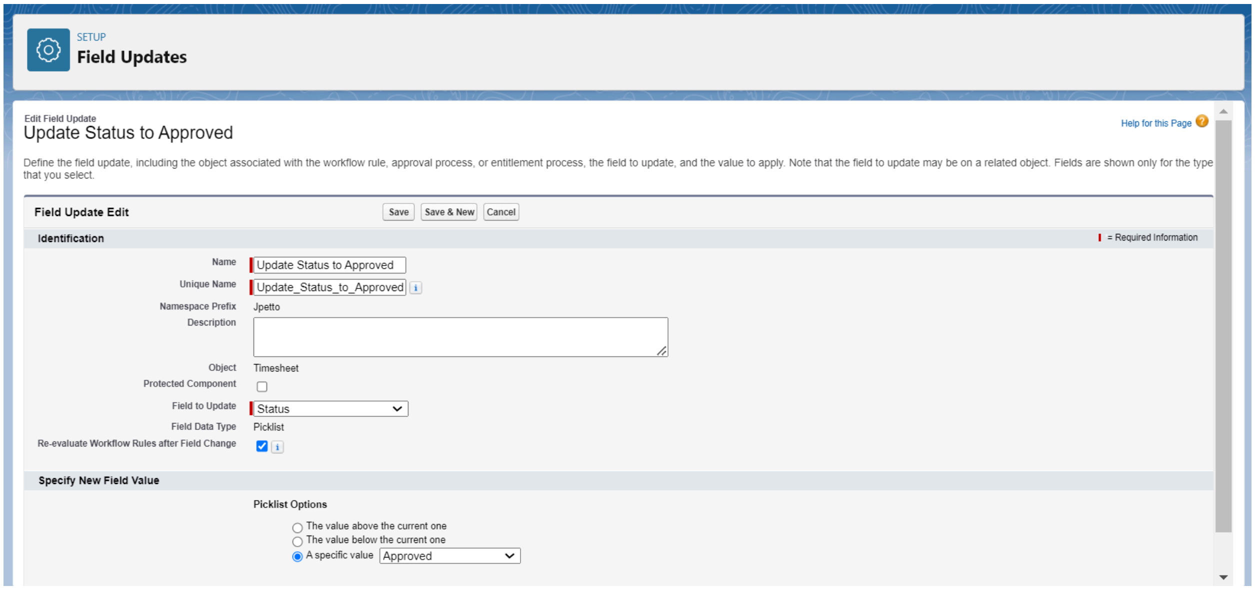


Step 27: Go back to the approval process detail page to add actions and approval steps. Select **Field Update** option from the **Add New** drop-down of the **Final Approval Actions** section.



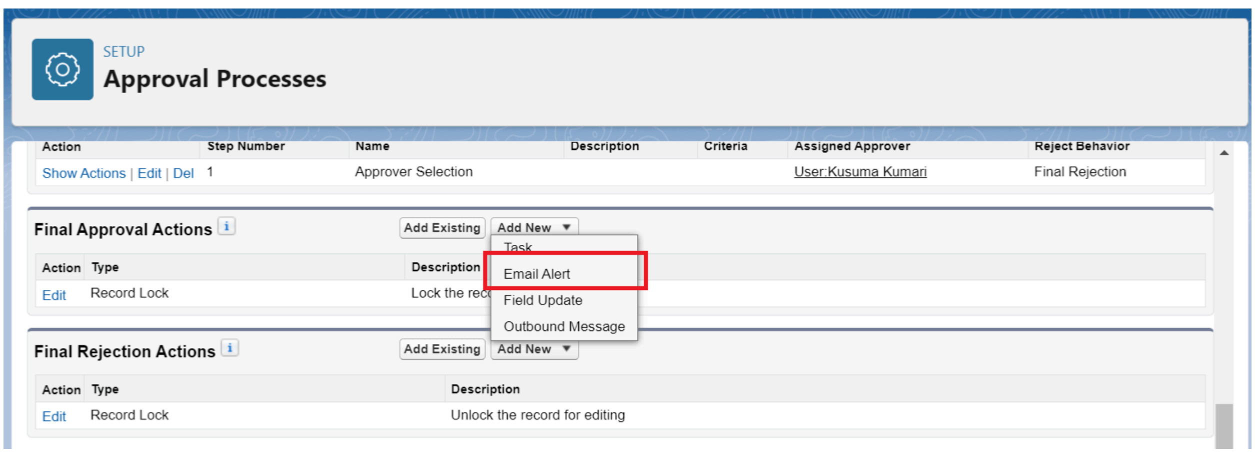
Step 28: Give your preferred name to the field update, select the **Status** field from the picklist of **Field to Update** field, and check the checkbox of **Re-evaluate Workflow Rules after Field Change**.

Step 29: Select **Approved** from the picklist of **A specific value** field under the **Specify New Field Value** section.

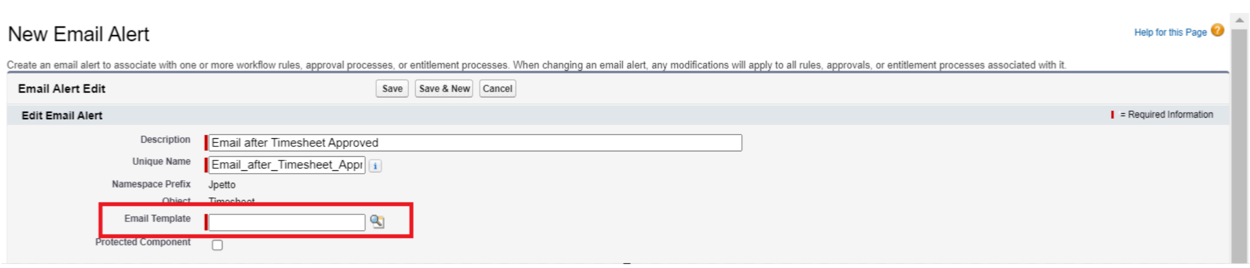


Step 30: Click **Save**.

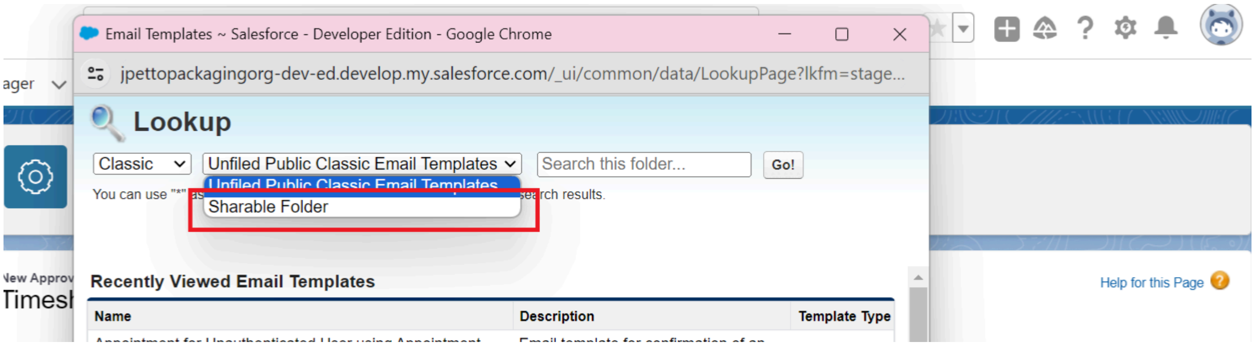
Step 31: Go back to the approval process detail page to add actions and approval steps, Select **Email Alert** option from the **Add New** drop-down of **Final Approval Actions** section.



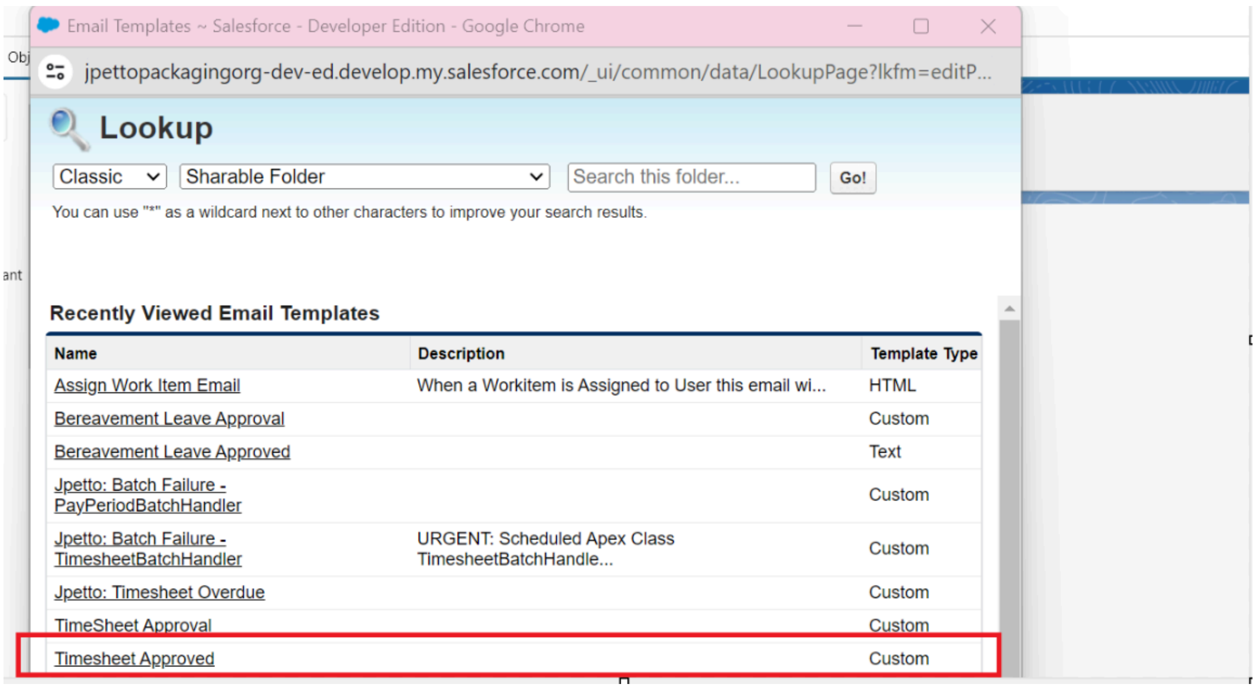
Step 32: Give your preferred name to the email alert, click on the **Lookup** of **Email Template** field.



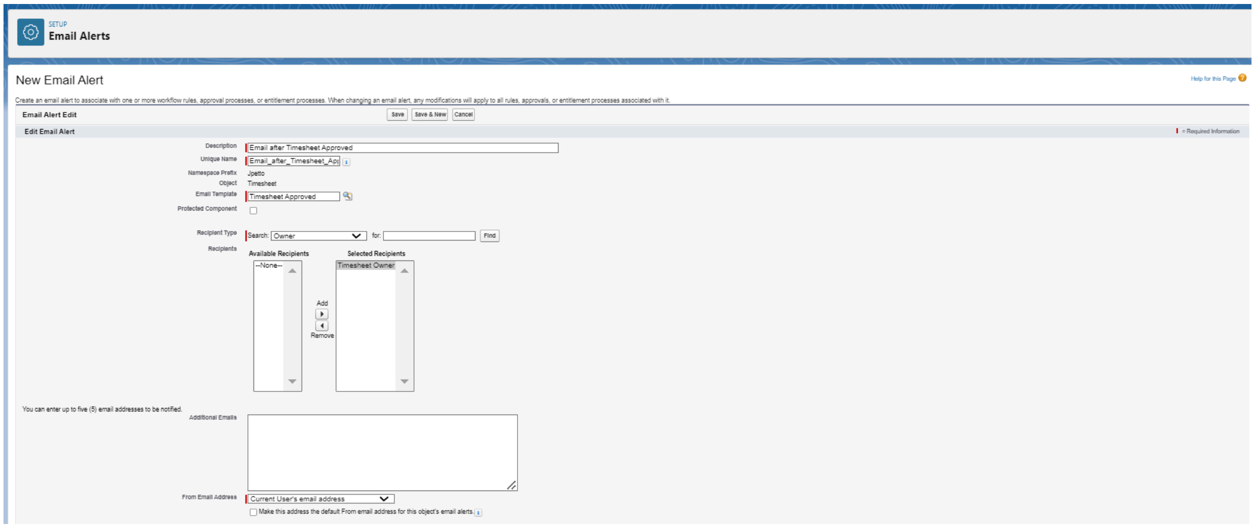
Step 33: On the pop-up screen select **Classic** from the drop-down, **Shareable Folder** from the drop-down.



Step 34: Select **Timesheet Approved** email template from the list.

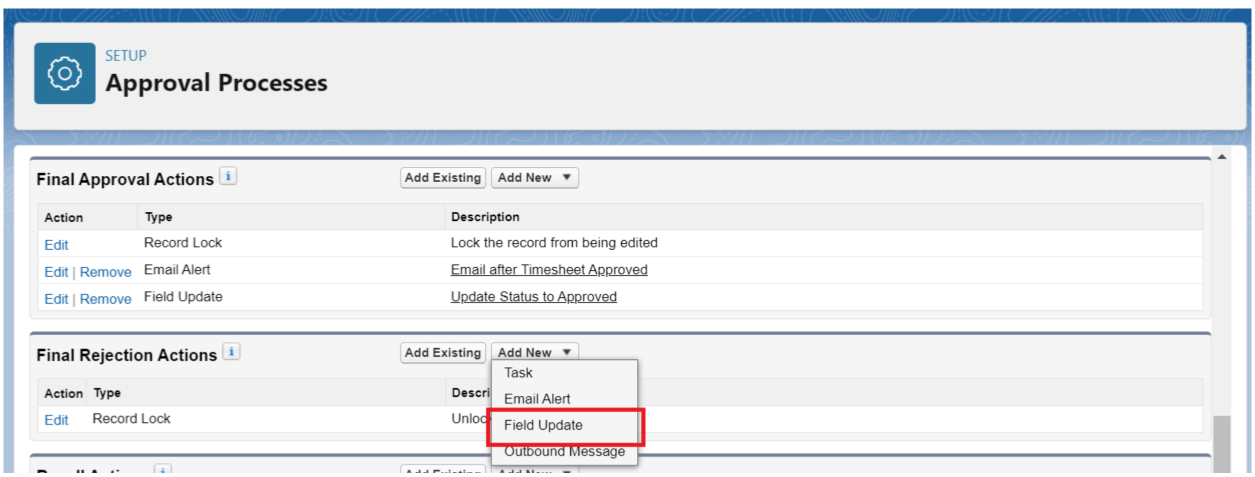


Step 35: Remove all the users added in the **Selected Recipients** and add the **Timesheet Owner**.



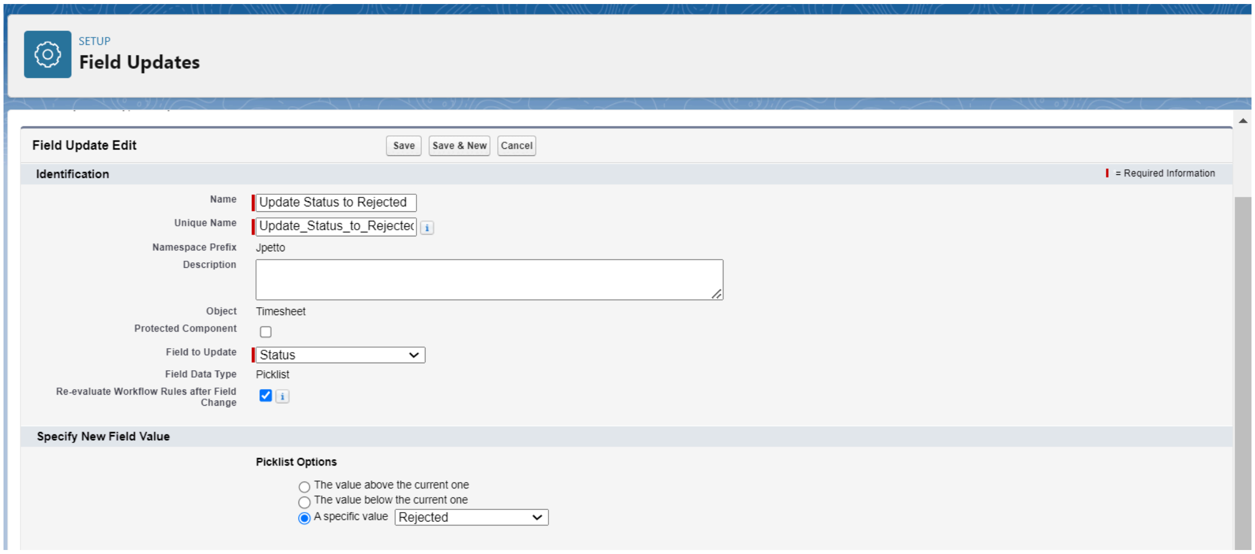
Step 36: Click **Save**.

Step 37: Go back to the approval process detail page to add actions and approval steps, Select **Field Update** option from the **Add New** drop-down of **Final Rejection Actions** section.



Step 38: Give your preferred name to the field update, select **Status** field from the picklist of **Field to Update** field, and check the checkbox of **Re-evaluate Workflow Rules after Field Change**.

Step 39: Select **Rejected** from the picklist of **A specific value** field under **Specify New Field Value** section.



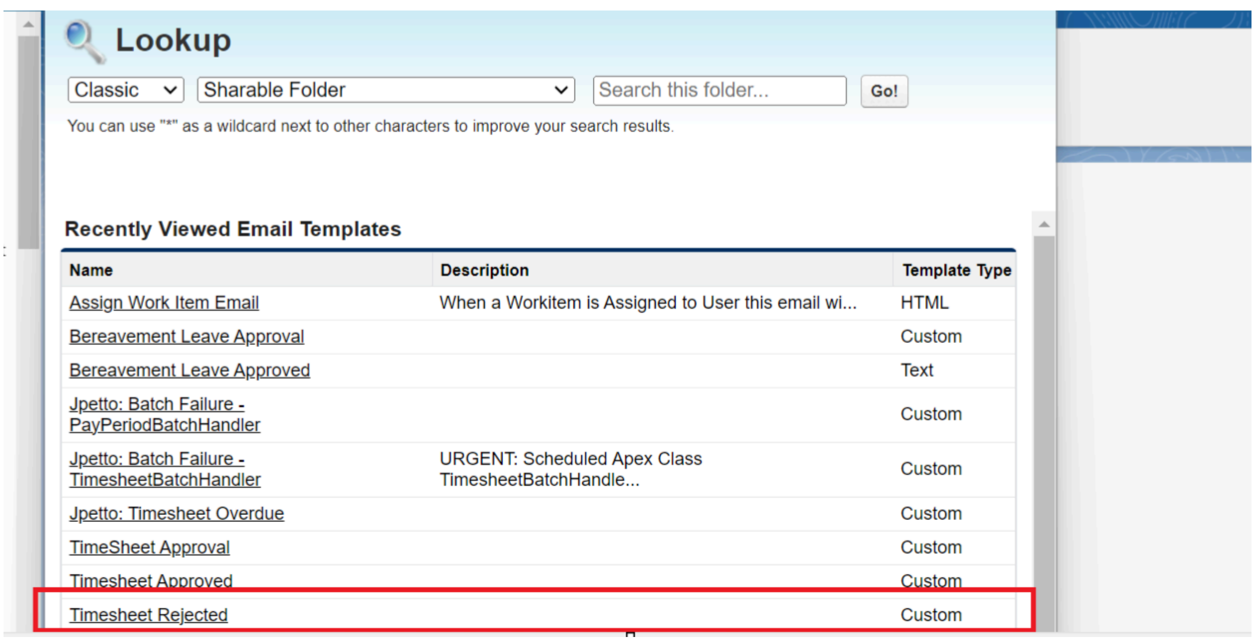
Step 40: Click **Save**.

Step 41: Go back to the approval process detail page to add actions and approval steps, Select **Email Alert** option from the **Add New** drop-down of **Final Rejection Actions** section.

Step 42: Give your preferred name to the email alert, and click on the **Lookup** of **Email Template** field.

Step 43: On the pop-up screen select **Classic** from the drop-down, **Shareable Folder** from the drop-down.

Step 44: Select **Timesheet Rejected** email template from the list.

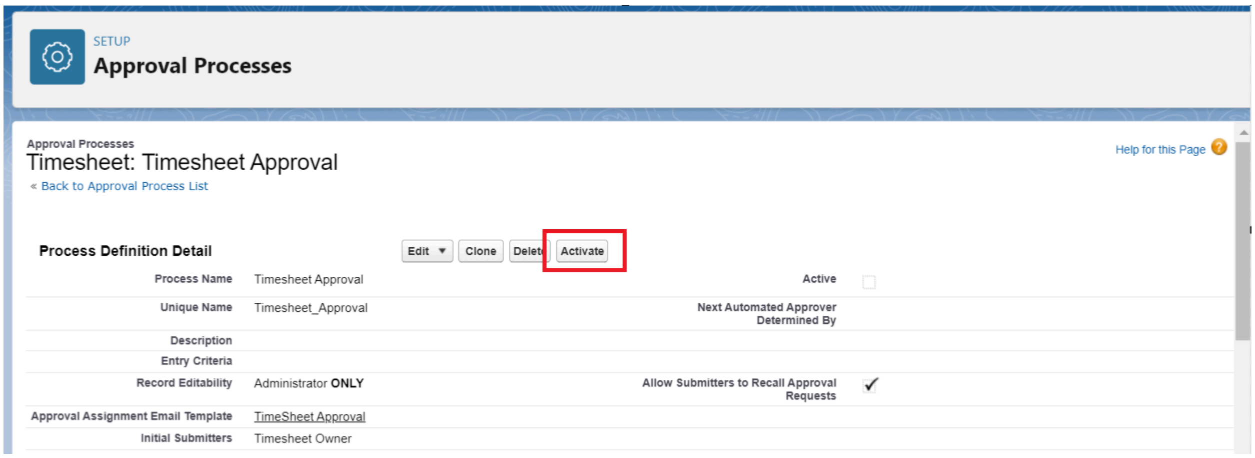


Step 45: Remove all the users added in the **Selected Recipients** and add the **Timesheet Owner**.

Step 46: Click **Save**.

Step 47: Go back to the approval process detail page to activate it.

Step 48: Click on the **Activate** button.

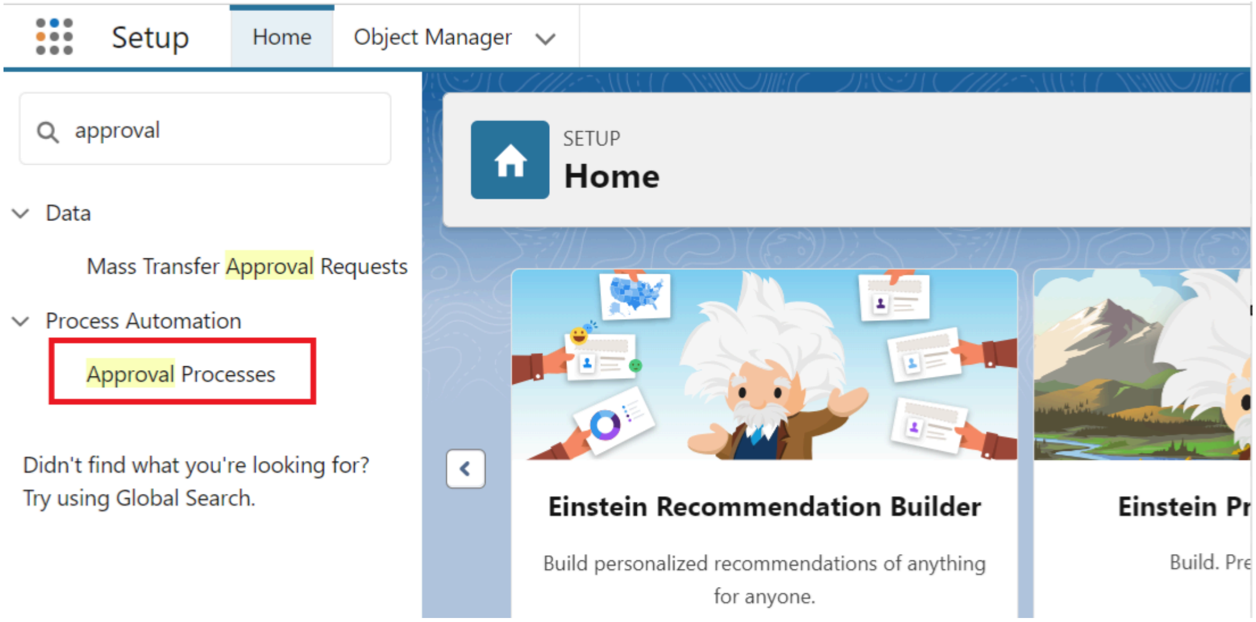


Now, the approval process is activated and ready to use.

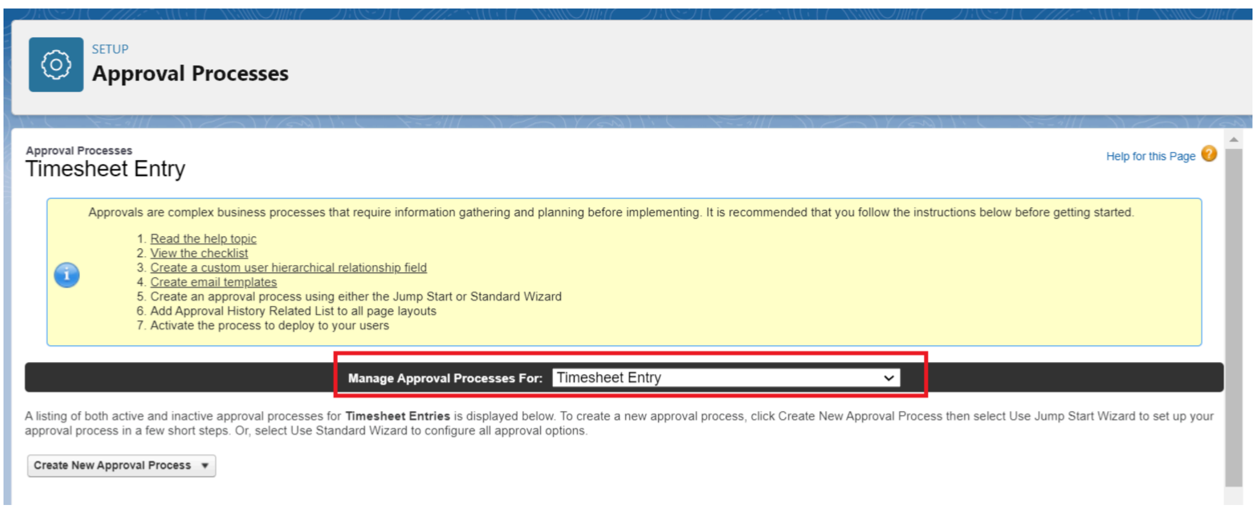
2. Bereavement Leave Approval

- This approval process has to be created by the organization admins based on their organization requirements. It helps to send the timesheet entries of bereavement leaves for approval to their user's manager or admin.
- To create this approval process follow the below steps:

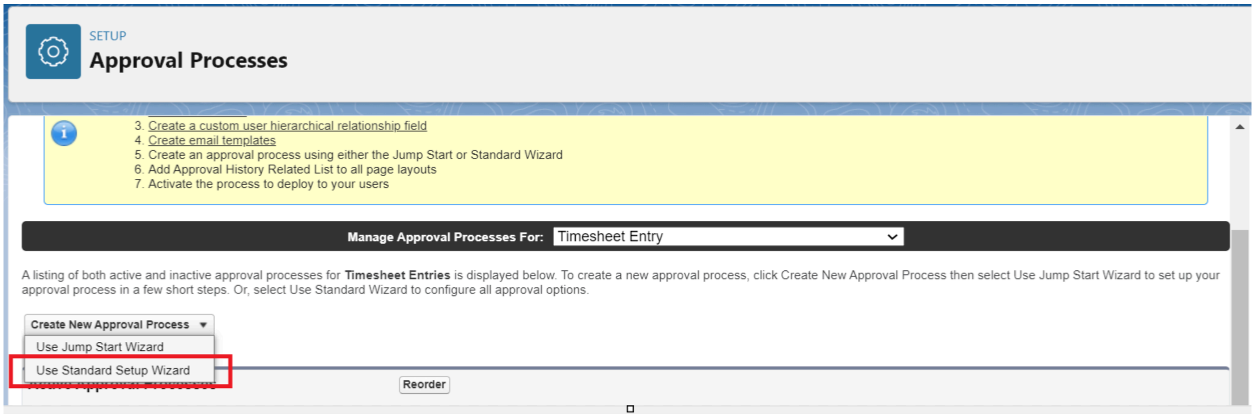
  Step 1: From the **Setup**, in the search box, type approval process and select the **Approval Processes** from the list below the search box as shown in fig.



Step 2: Select the **Timesheet Entry** object from the picklist of **Manage Approval Processes For**.

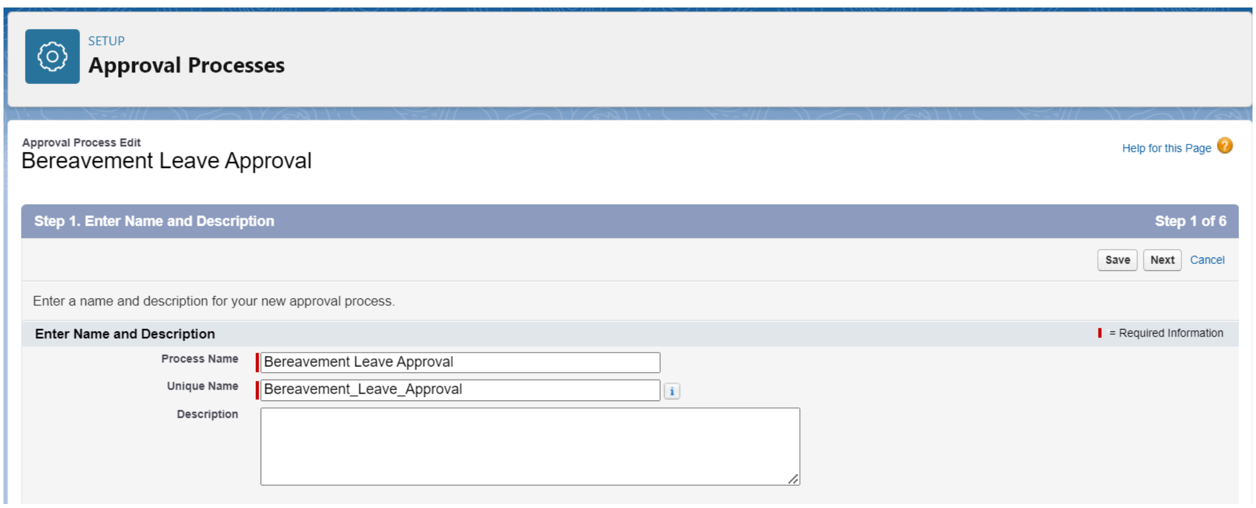


Step 3: Select the **Use Standard Setup Wizard** from **Create New Approval Process** dropdown list.



Step 4: Add the name of **Bereavement Leave Approval** on the **Process Name** field, the **Unique Name** field will be auto-generated.

Step 5: Description is optional, you can add details as per your requirement.



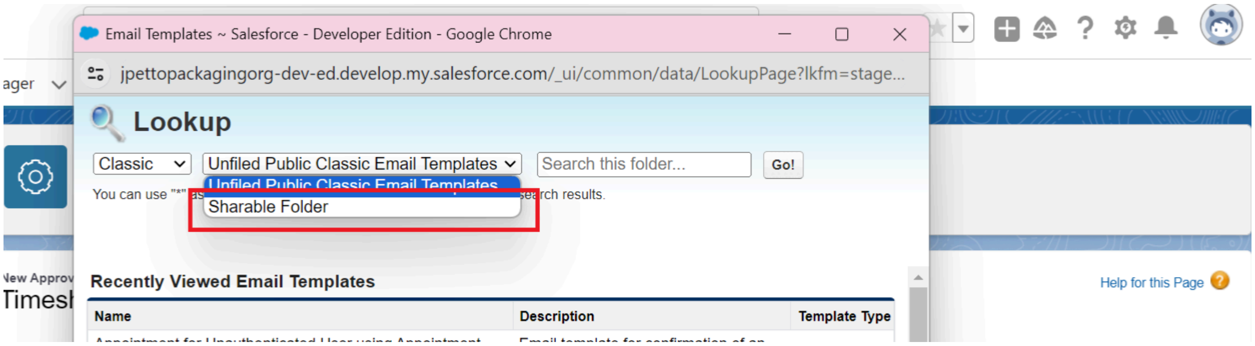
Step 6: Click **Next**.

Step 7: Click **Next**.

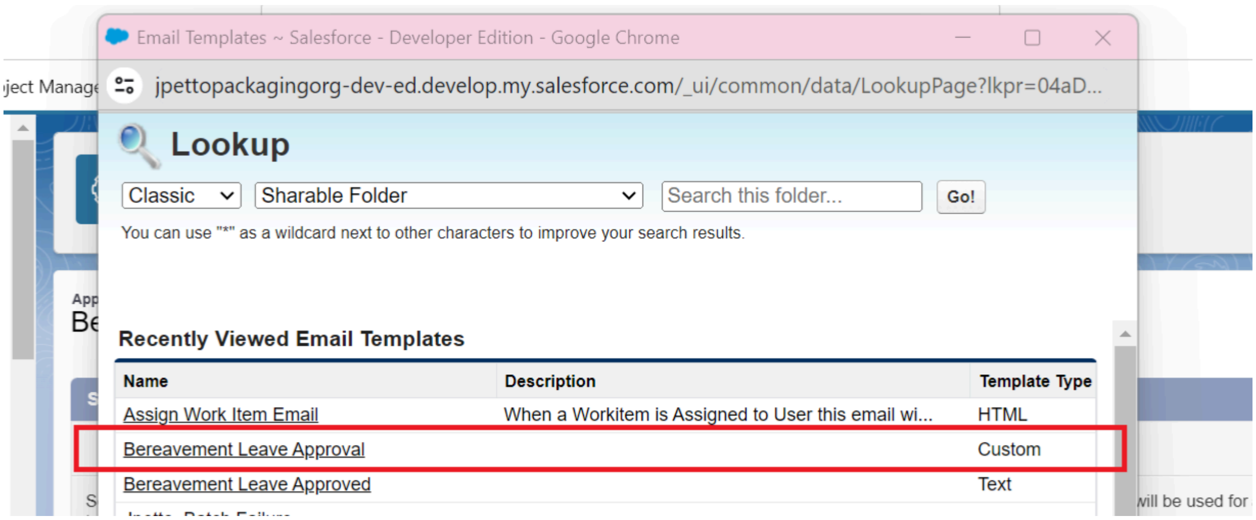
Step 8: Click **Next**.

Step 9: Click on the **Look Up** icon of **Approval Assignment Email Template** field.

Step 10: On the pop-up screen select **Classic** from the drop-down, **Shareable Folder** from the drop-down.

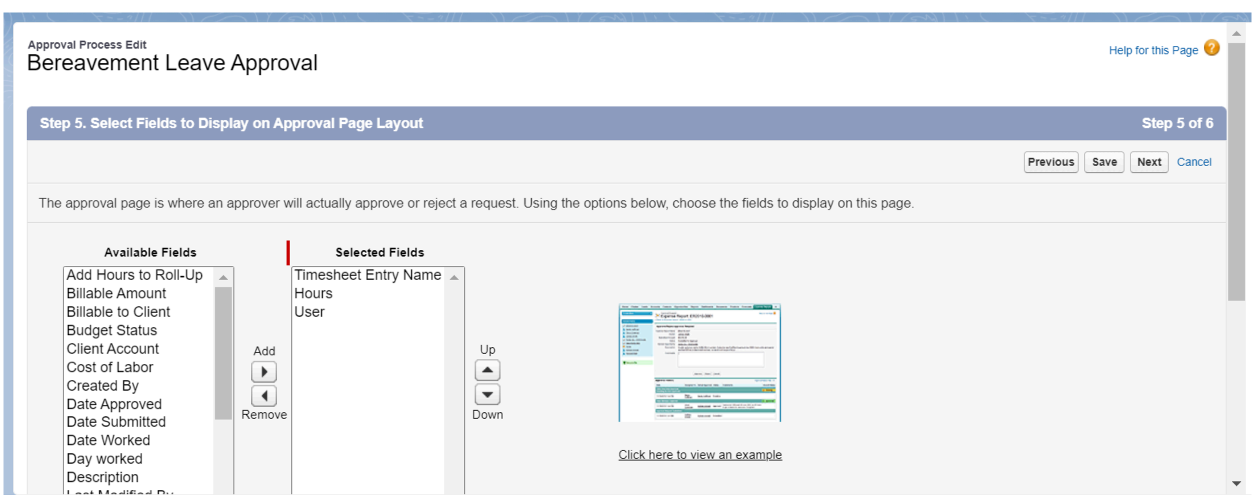


Step 11: Select **Bereavement Leave Approval** email template from the list.



Step 12: Click **Next**.

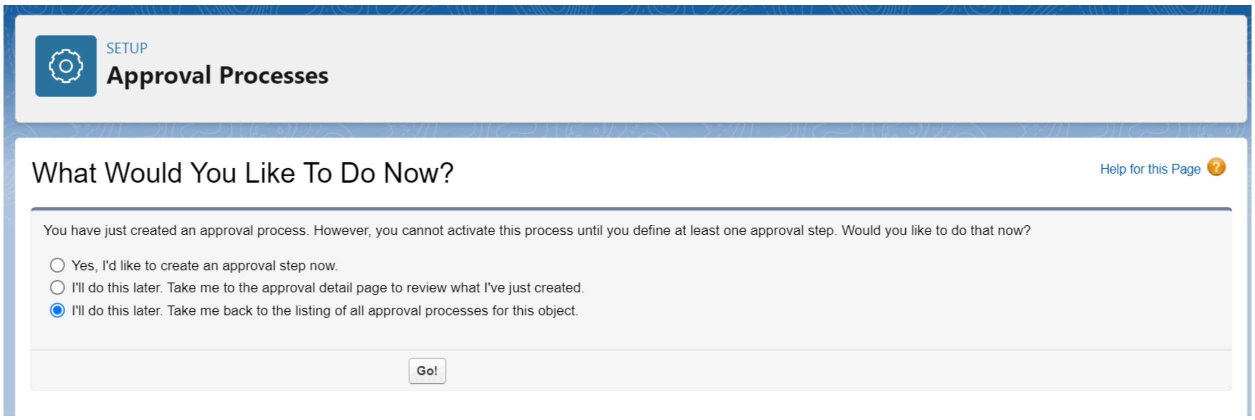
Step 13: Select all the fields you want to display to the approver on the approver page of the timesheet into the **Selected Fields** sections.



Step 14: Click **Next**.

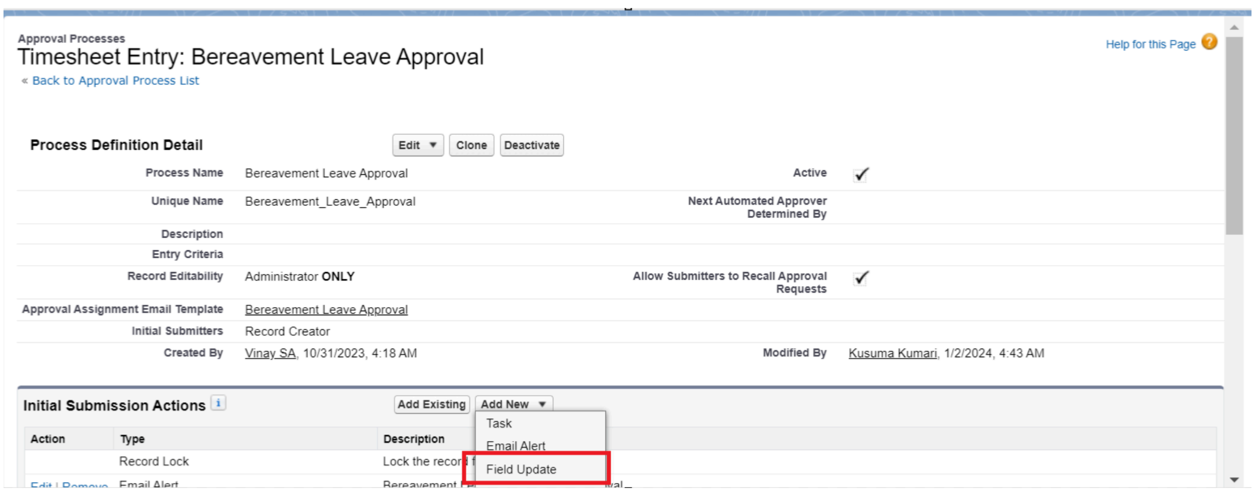
Step 15: Remove all the users added to the **Selected Recipients**, add the **Record Creator** to it and click **Save**.

Step 16: Select **I'll do this later. Take me back to the listing of all approval processes for this object** and click **Go**.



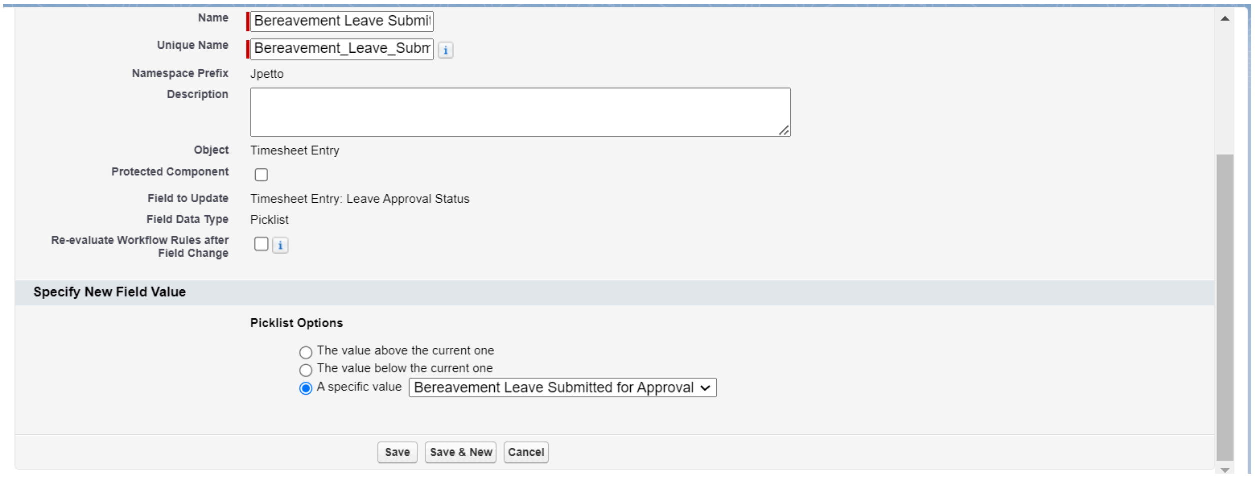
Step 17: Go back to the approval process detail page to add actions and approval steps.

Step 18: Select **Field Update** option from the **Add New** drop-down of **Initial Submission Actions** section.



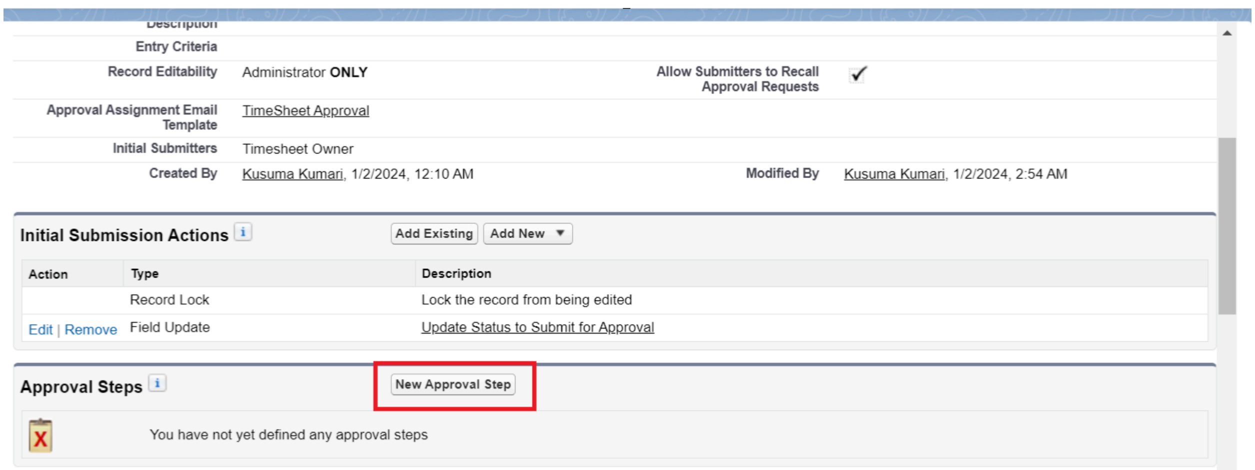
Step 19: Give your preferred name to the field update, select **Leave Approval Status** field from the picklist of **Field to Update** field, and check the checkbox of **Re-evaluate Workflow Rules after Field Change**.

Step 20: Select **Bereavement Leave Submitted for Approval** from the picklist of **A specific value** field under **Specify New Field Value** section.



Step 21: Click **Save**.

Step 22: Click the **New Approval Step** button in the Approval Steps section.

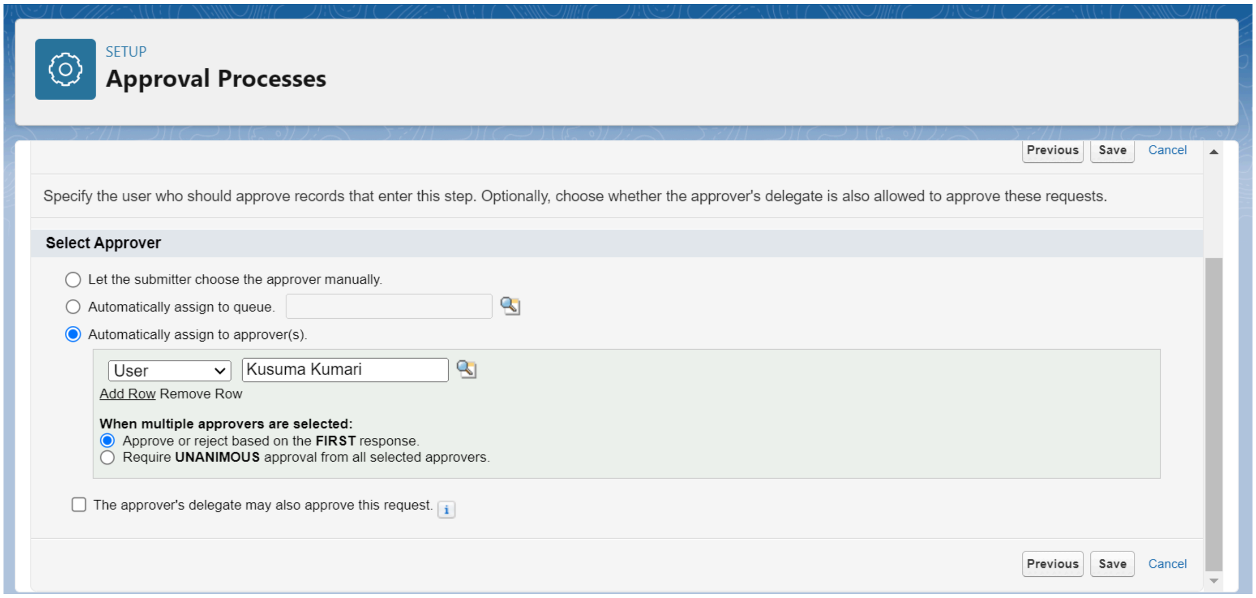


Step 23: Give your preferred name to the approval step and click **Next**.

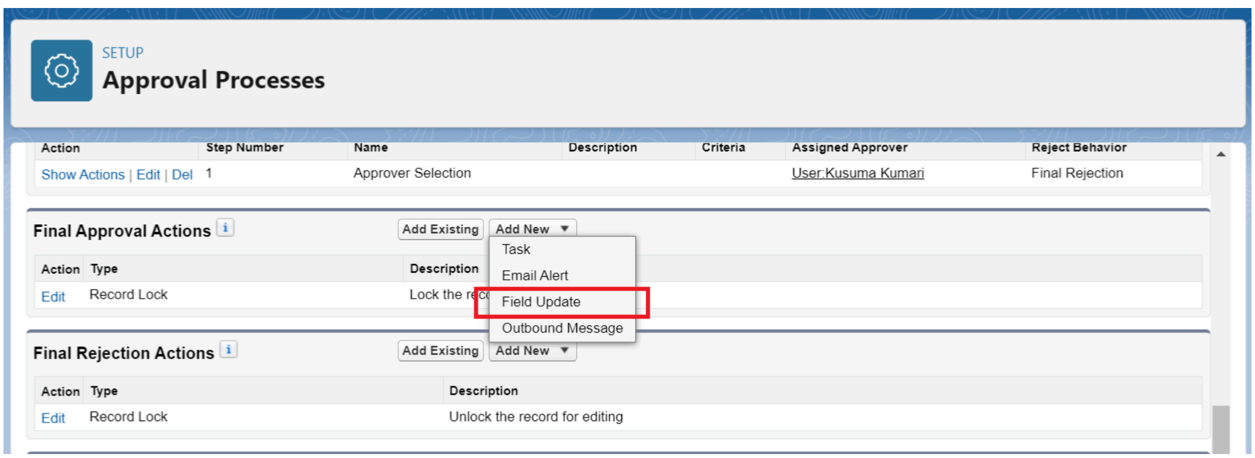
Step 24: Click **Next**.

Step 25: Select the option from the screen as per your business requirement.

Step 26: Click **Save**.

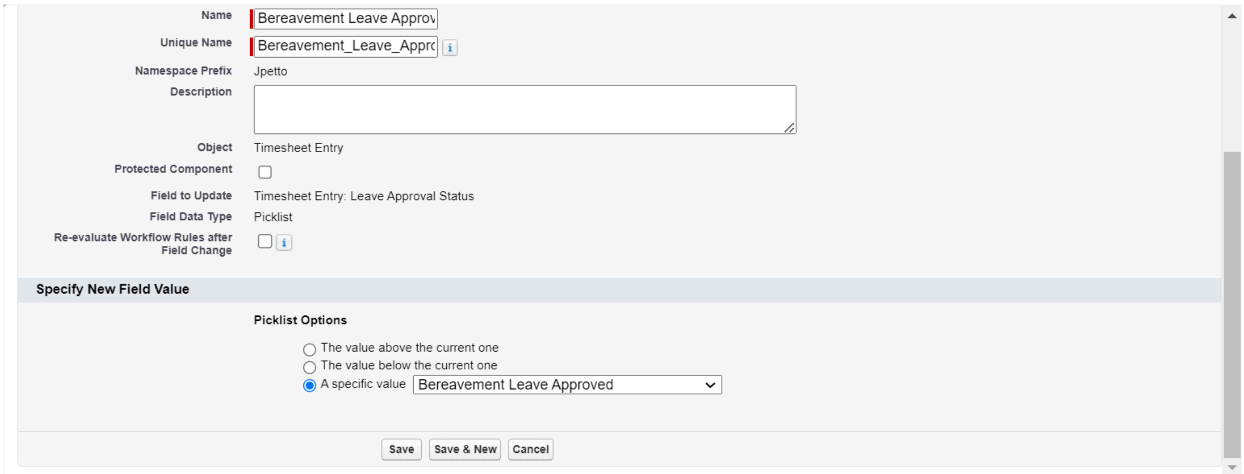


Step 27: Go back to the approval process detail page to add actions and approval steps, Select **Field Update** option from the **Add New** drop-down of **Final Approval Actions** section.



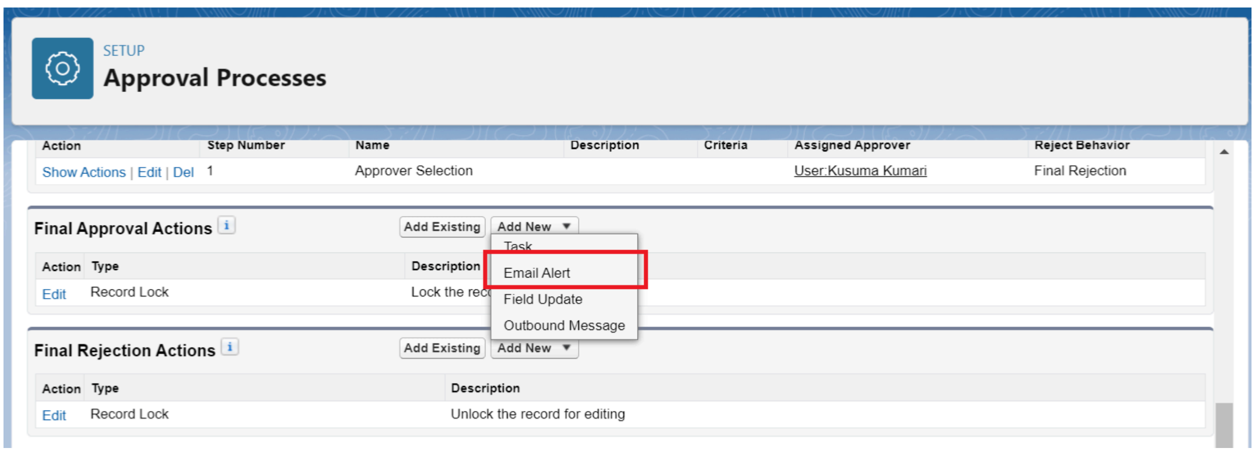
Step 28: Give your preferred name to the field update, select **Leave Approval Status** field from the picklist of **Field to Update** field, and check the checkbox of **Re-evaluate Workflow Rules after Field Change**.

Step 29: Select **Bereavement Leave Approved** from the picklist of **A specific value** field under **Specify New Field Value** section.



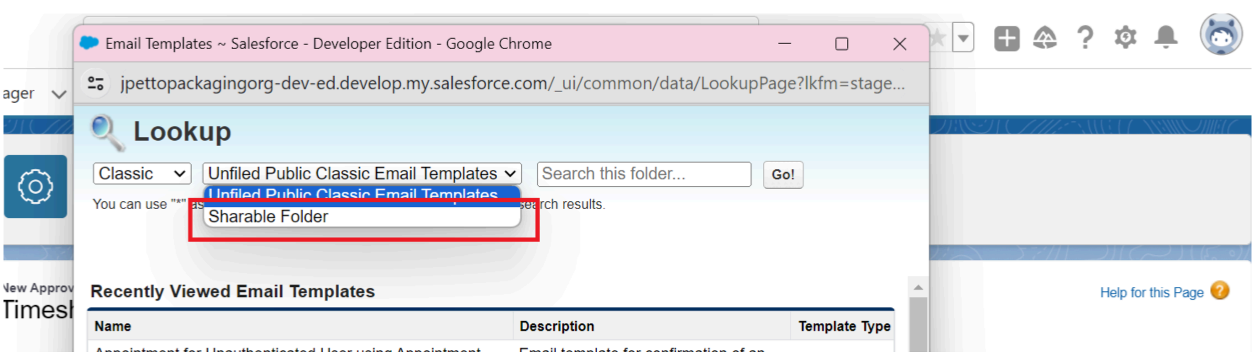
Step 30: Click **Save**.

Step 31: Go back to the approval process detail page to add actions and approval steps, Select **Email Alert** option from the **Add New** drop-down of **Final Approval Actions** section.

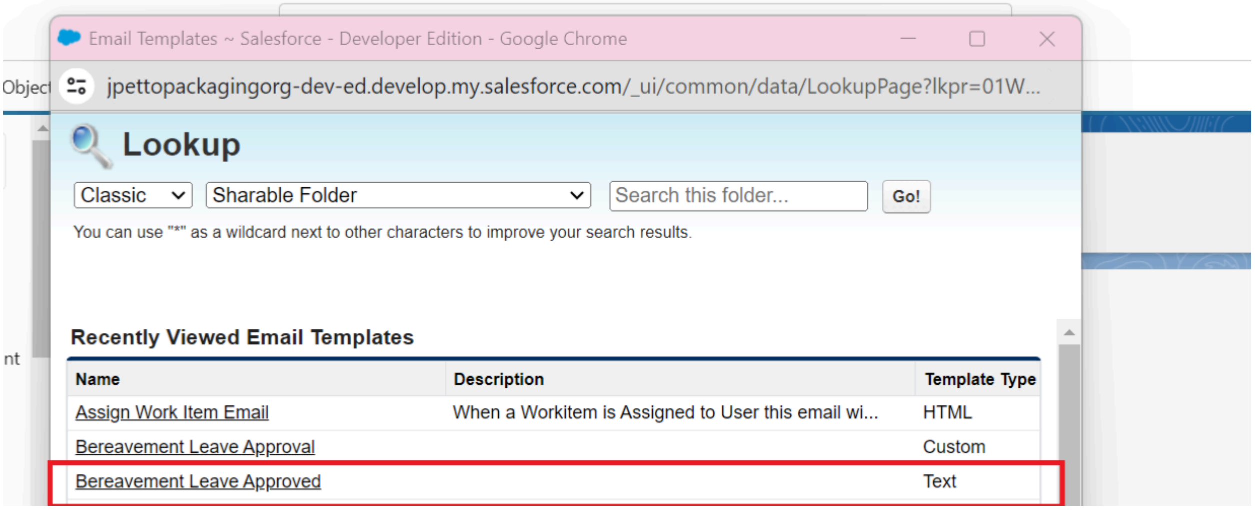


Step 32: Give your preferred name to the email alert, and click on the **Lookup** of **Email Template** field.

Step 33: On the pop-up screen select **Classic** from the drop-down, **Shareable Folder** from the drop-down.



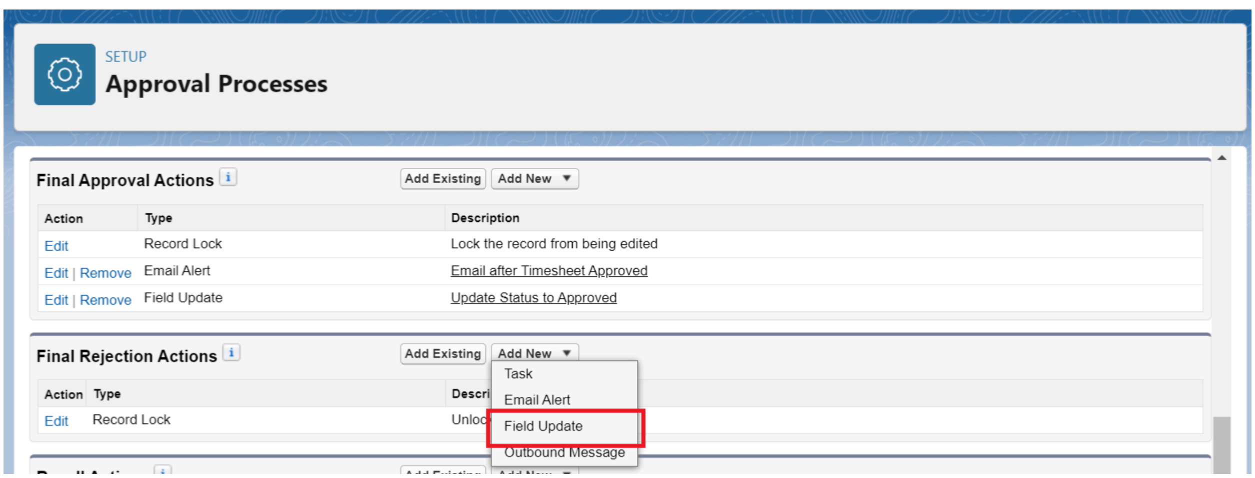
Step 34: Select **Bereavement Leave Approved** email template from the list.



Step 35: Remove all the users added in the **Selected Recipients** and add the **Record Creator** to it.

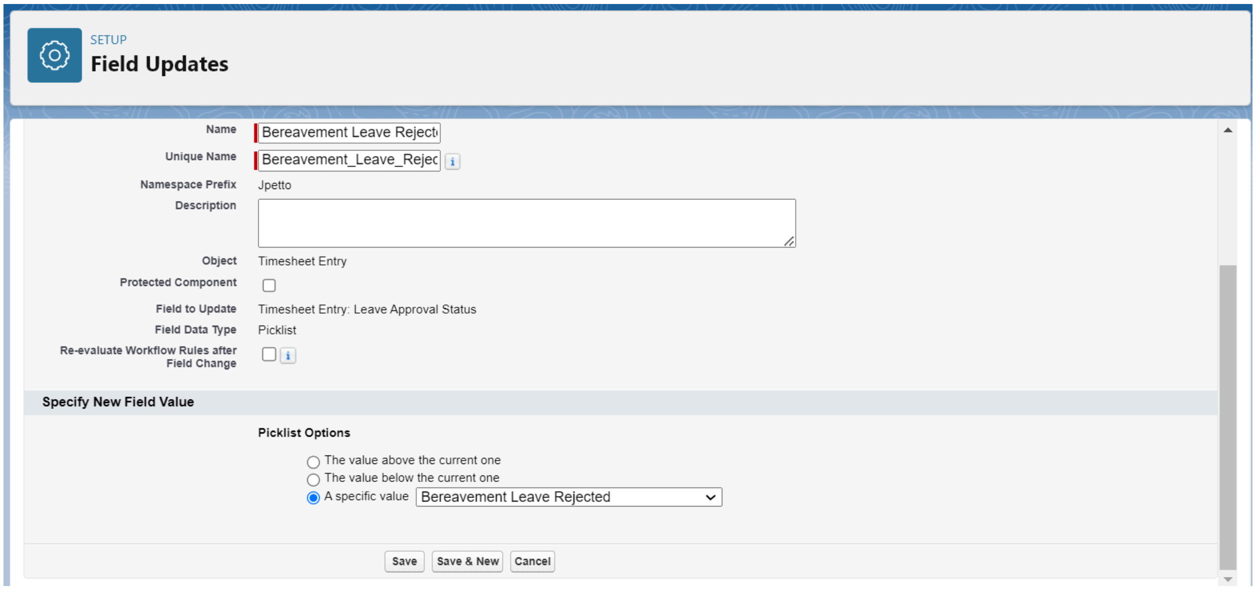
Step 36: Click **Save**.

Step 37: Go back to the approval process detail page to add actions and approval steps, Select **Field Update** option from the **Add New** drop-down of **Final Rejection Actions** section.



Step 38: Give your preferred name to the field update, select **Leave Approval Status** field from the picklist of **Field to Update** field, and check the checkbox of **Re-evaluate Workflow Rules after Field Change**.

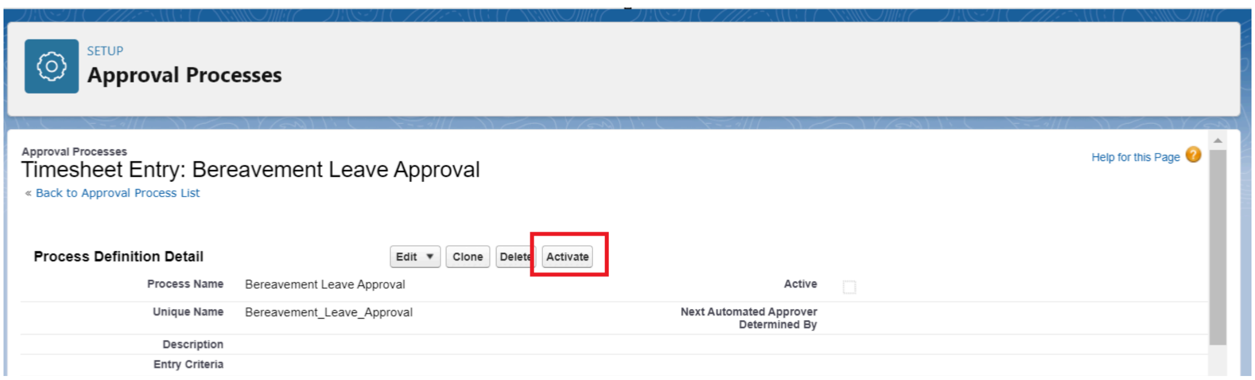
Step 39: Select **Bereavement Leave Rejected** from the picklist of **A specific value** field under **Specify New Field Value** section.



Step 40: Click **Save**.

Step 41: Go back to the approval process detail page to activate it.

Step 42: Click on the **Activate** button.

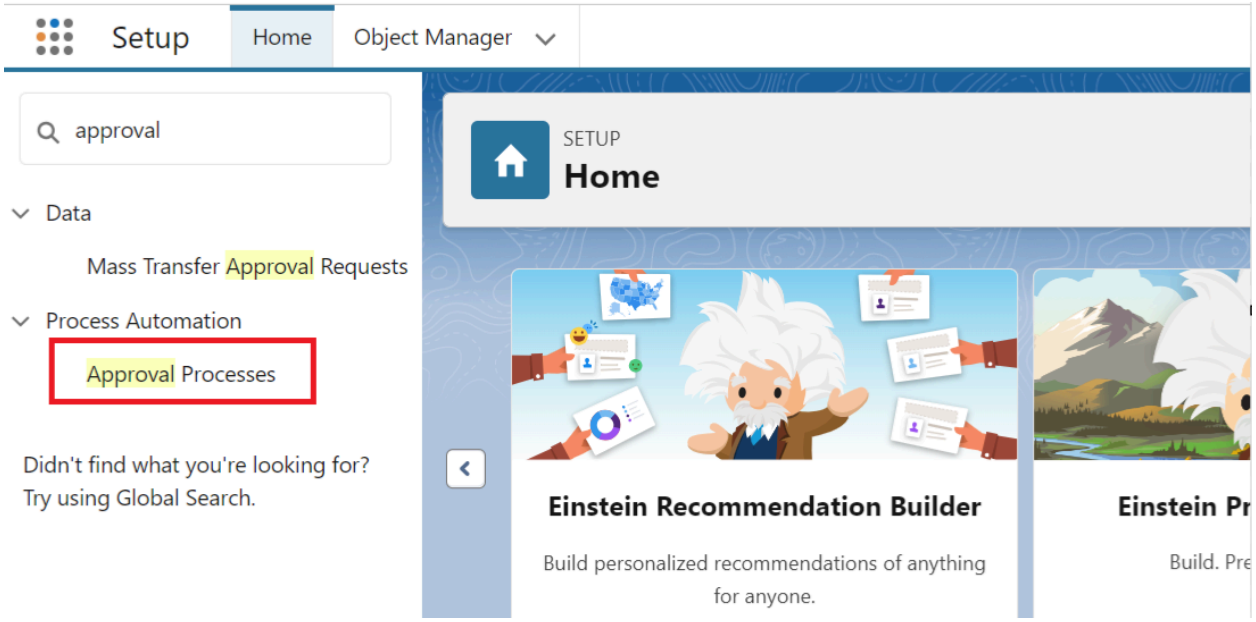


Now, the approval process is activated and ready to use.

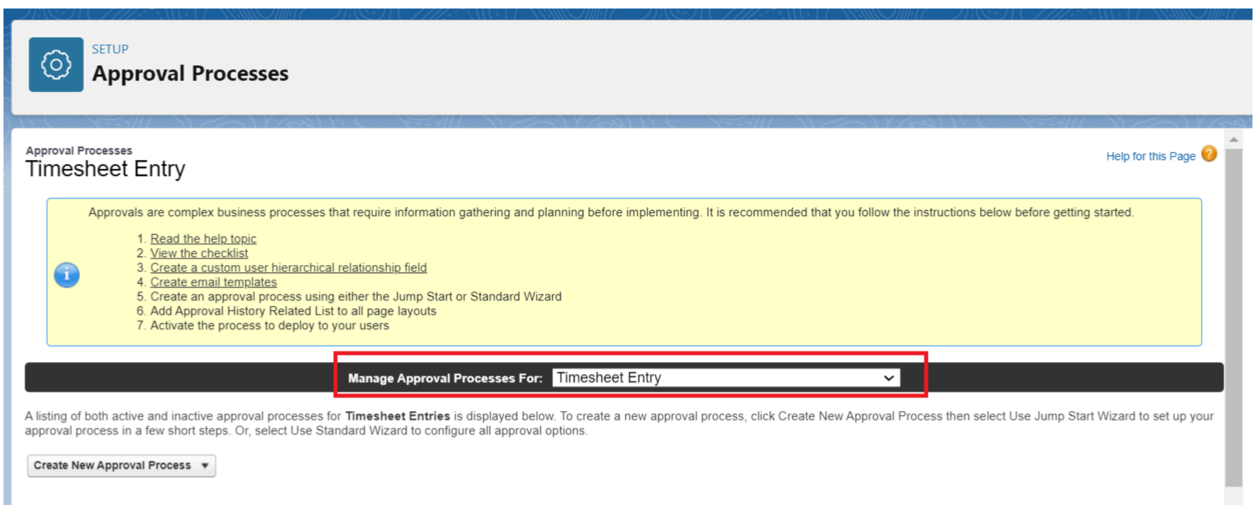
3. Vacation Leave Approval

- This approval process has to be created by the organization admins based on their organization requirements. It helps to send the timesheet entries of vacation leaves for approval to their user's manager or admin.
- To create this approval process follow the below steps:

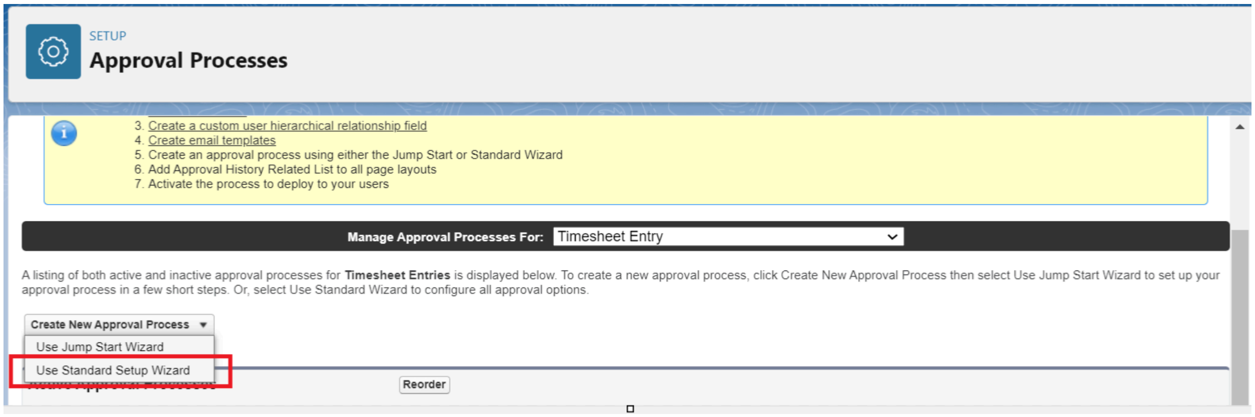
  Step 1: From the **Setup**, in the search box, type approval process and select the **Approval Processes** from the list below the search box as shown in fig.



Step 2: Select the **Timesheet Entry** object from the picklist of **Manage Approval Processes For**.

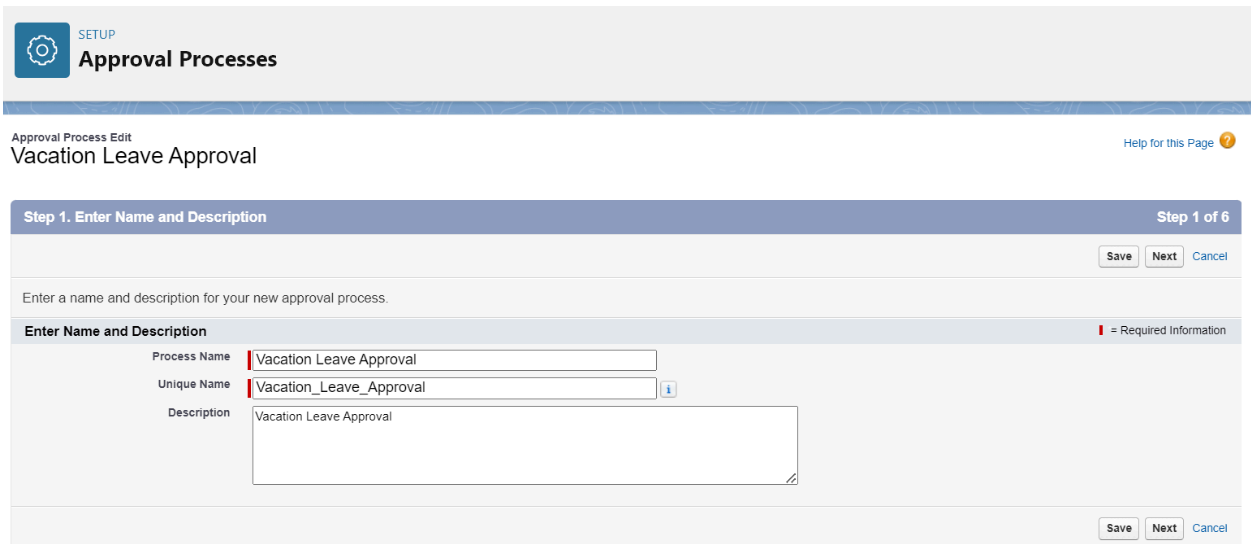


Step 3: Select the **Use Standard Setup Wizard** from **Create New Approval Process** drop-down list.



Step 4: Add **Vacation Leave Approval** name on **Process Name** field, **Unique Name** field will be auto-generated.

Step 5: Description is optional, you can add details as per your requirement.



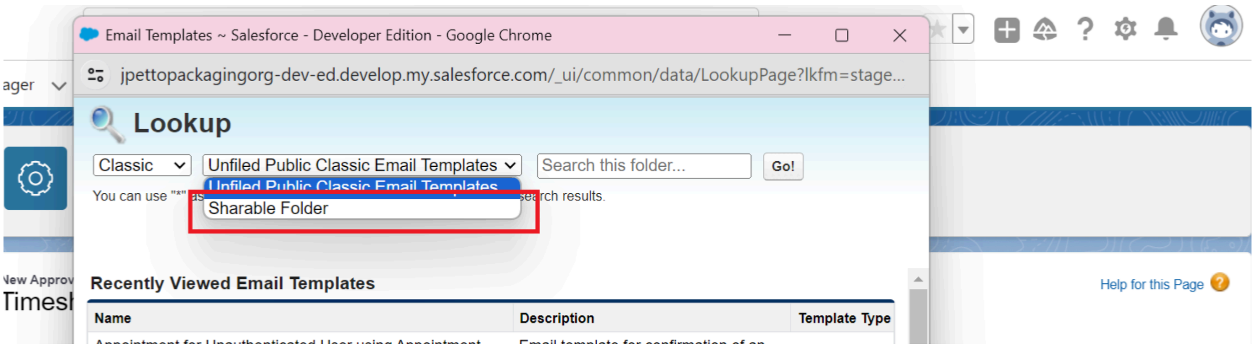
Step 6: Click **Next**.

Step 7: Click **Next**.

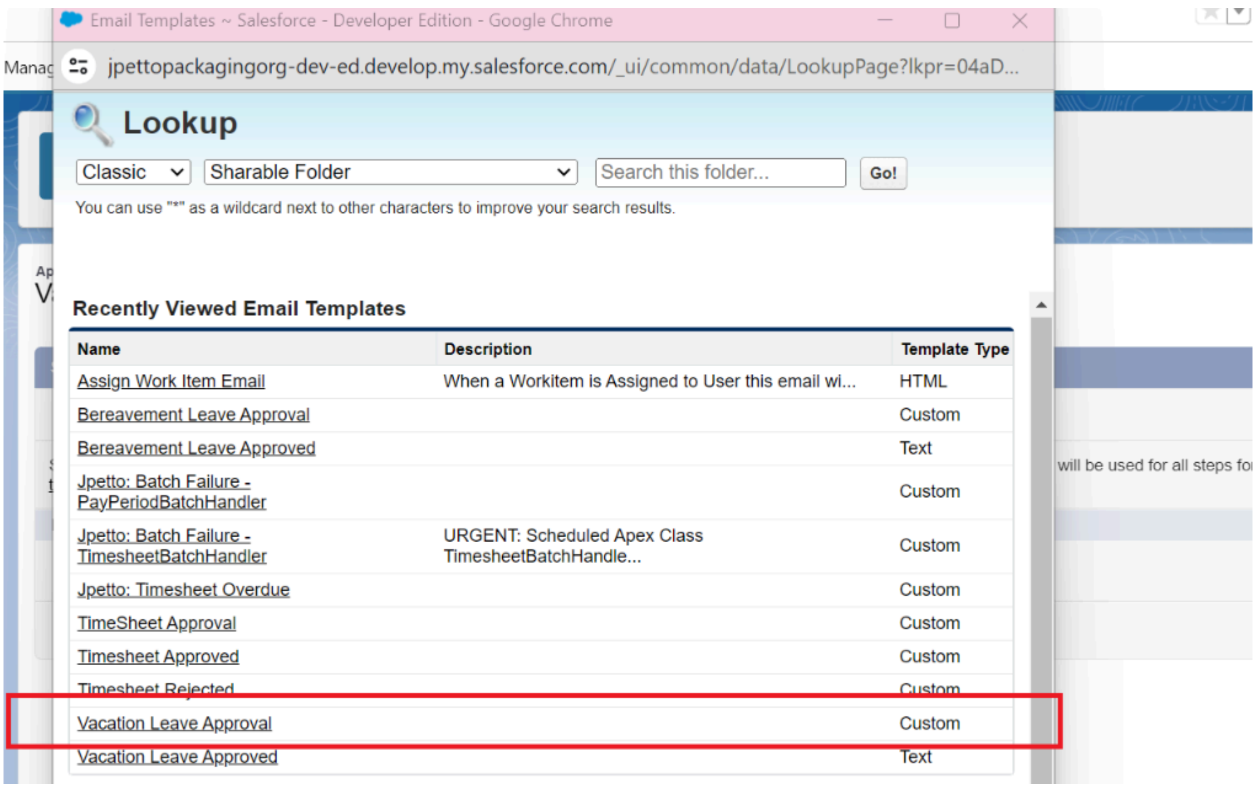
Step 8: Click **Next**.

Step 9: Click on the **Look Up** icon of **Approval Assignment Email Template** field.

Step 10: On the pop-up screen select **Classic** from the drop-down, **Shareable Folder** from the drop-down.

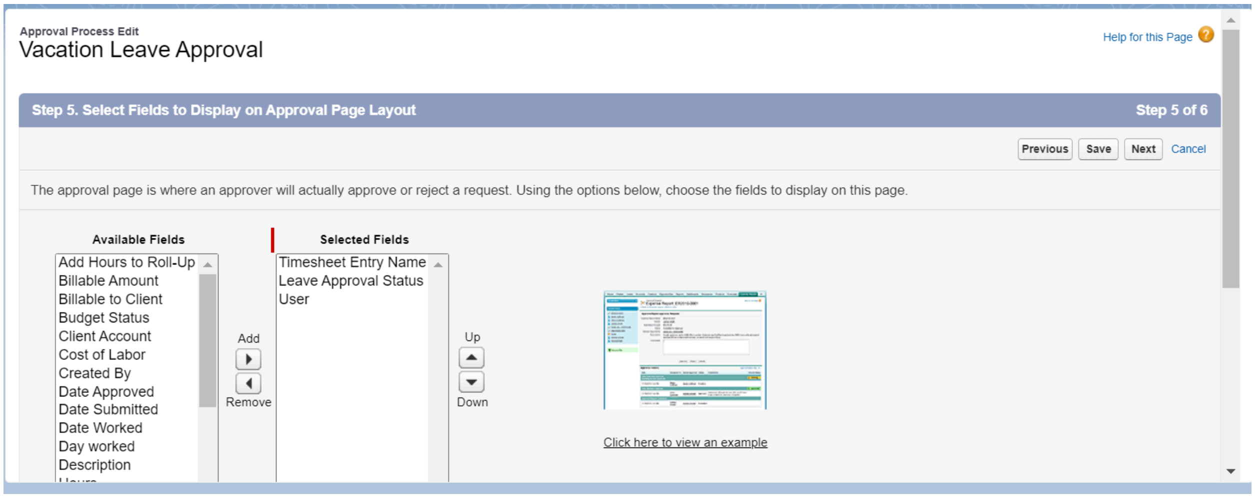


Step 11: Select **Vacation Leave Approval** email template from the list.



Step 12: Click **Next**.

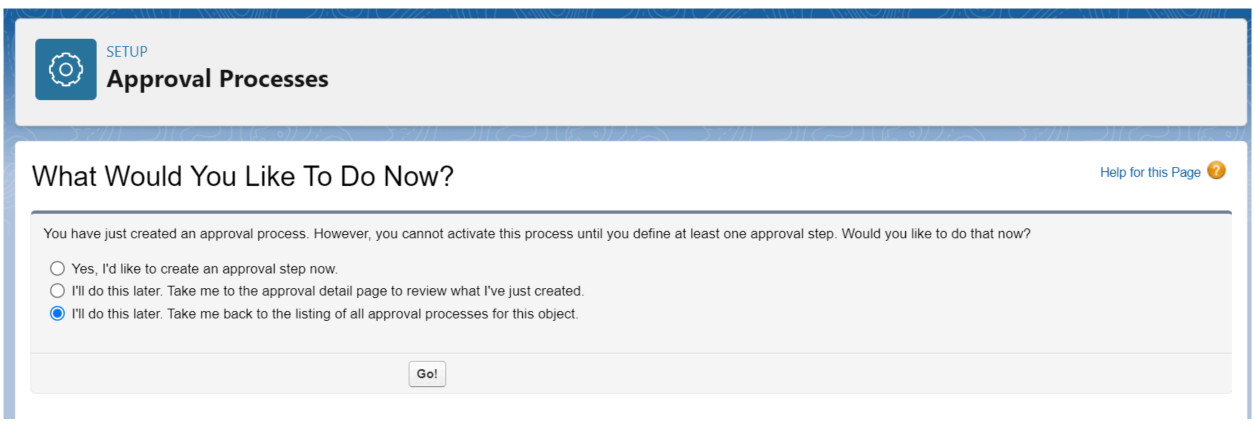
Step 13: Select all the fields you want to display to the approver on the approver page of the timesheet into the **Selected Fields** sections.



Step 14: Click **Next**.

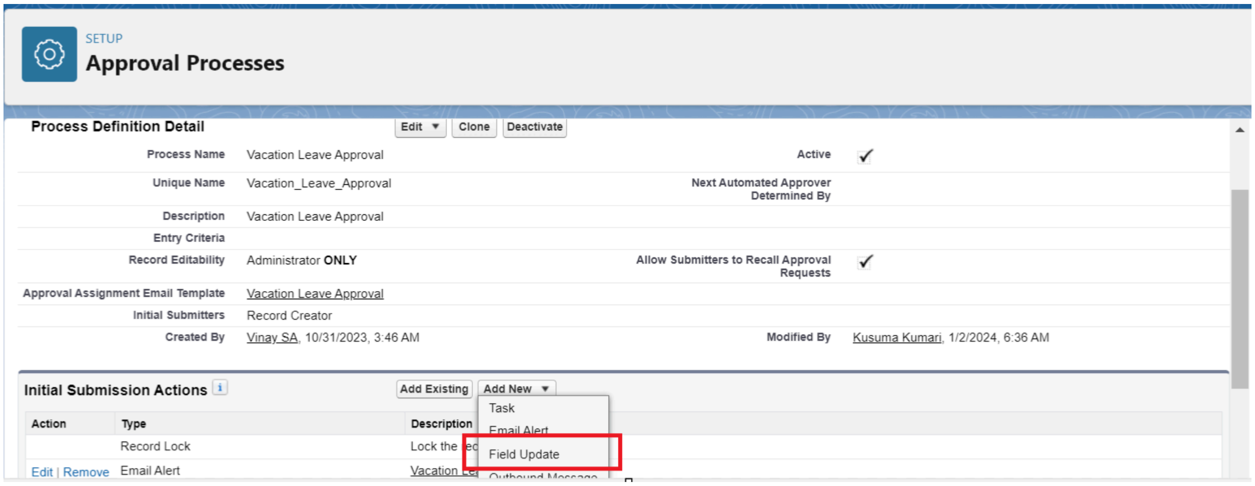
Step 15: Remove all the users added in the **Selected Recipients**, add the **Record Creator** to it and click **Save**.

Step 16: Select **I'll do this later. Take me back to the listing of all approval processes for this object** and click **Go**.



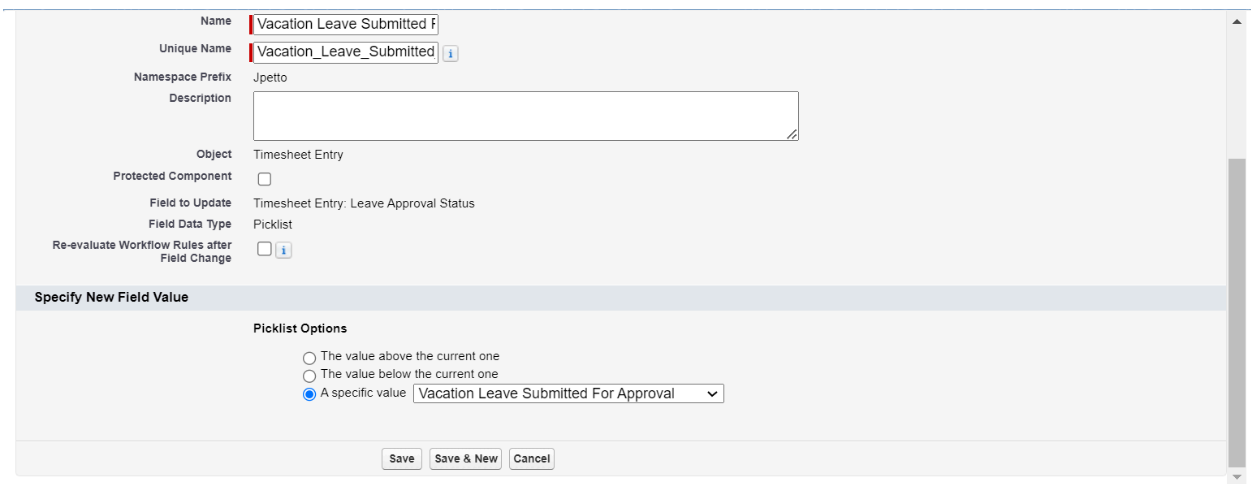
Step 17: Go back to the approval process detail page to add actions and approval steps.

Step 18: Select **Field Update** option from the **Add New** drop-down of **Initial Submission Actions** section.



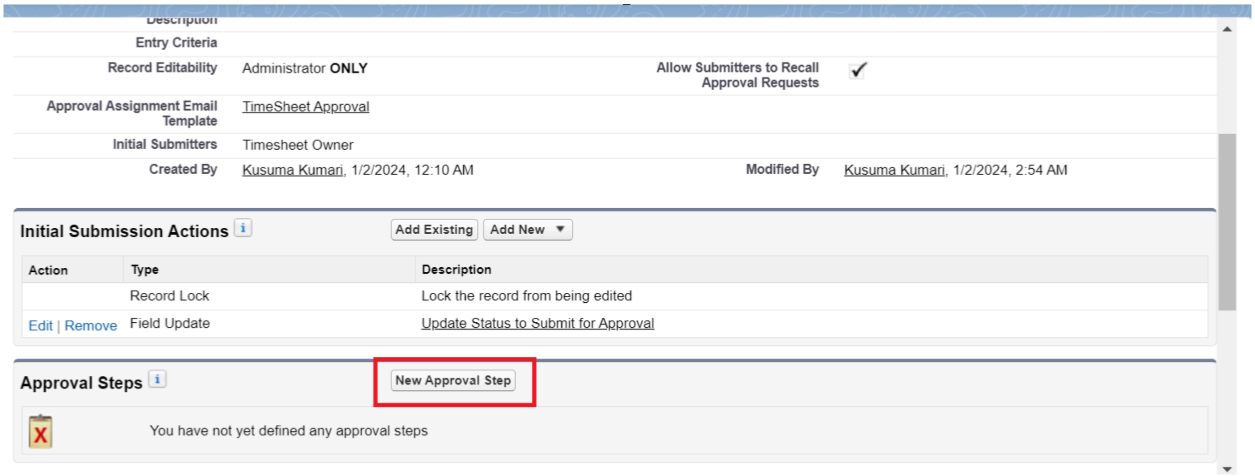
Step 19: Give your preferred name to the field update, select **Leave Approval Status** field from the picklist of **Field to Update** field, and check the checkbox of **Re-evaluate Workflow Rules after Field Change**.

Step 20: Select **Vacation Leave Submitted for Approval** from the picklist of **A specific value** field under **Specify New Field Value** section.



Step 21: Click **Save**.

Step 22: Click the **New Approval Step** button in the Approval Steps section.

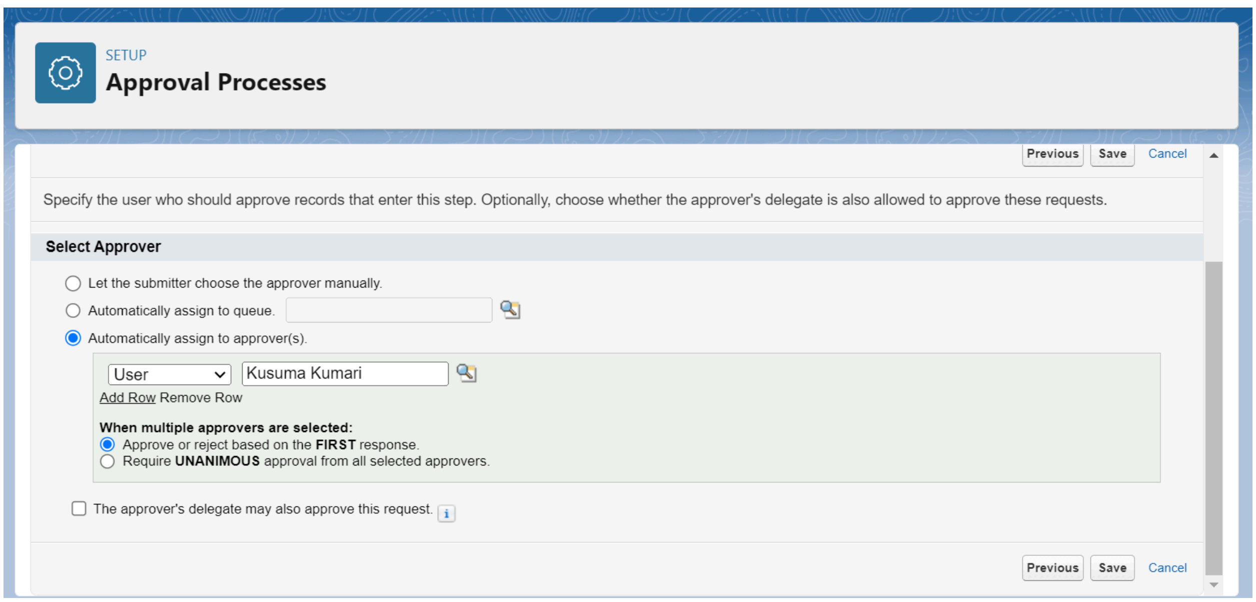


Step 23: Give your preferred name to the approval step and click **Next**.

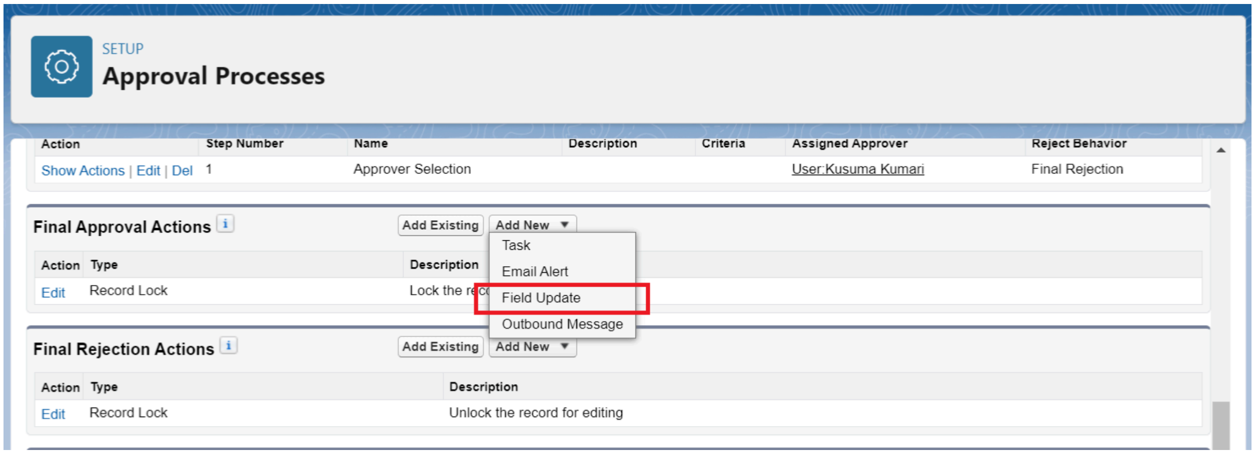
Step 24: Click **Next**.

Step 25: Select the option from the screen as per your business requirement.

Step 26: Click **Save**.

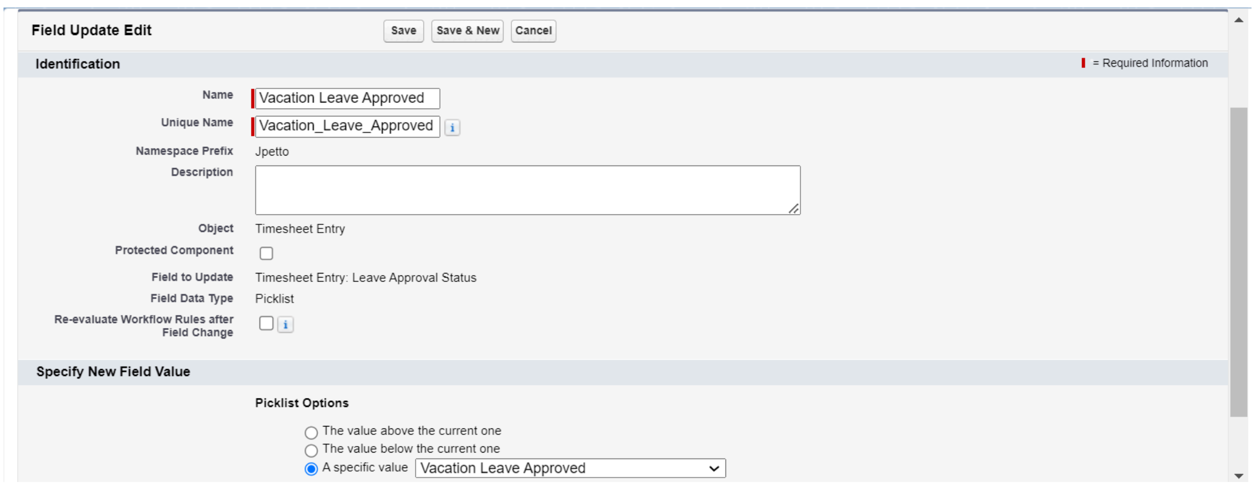


Step 27: Go back to the approval process detail page to add actions and approval steps, Select **Field Update** option from the **Add New** drop-down of **Final Approval Actions** section.



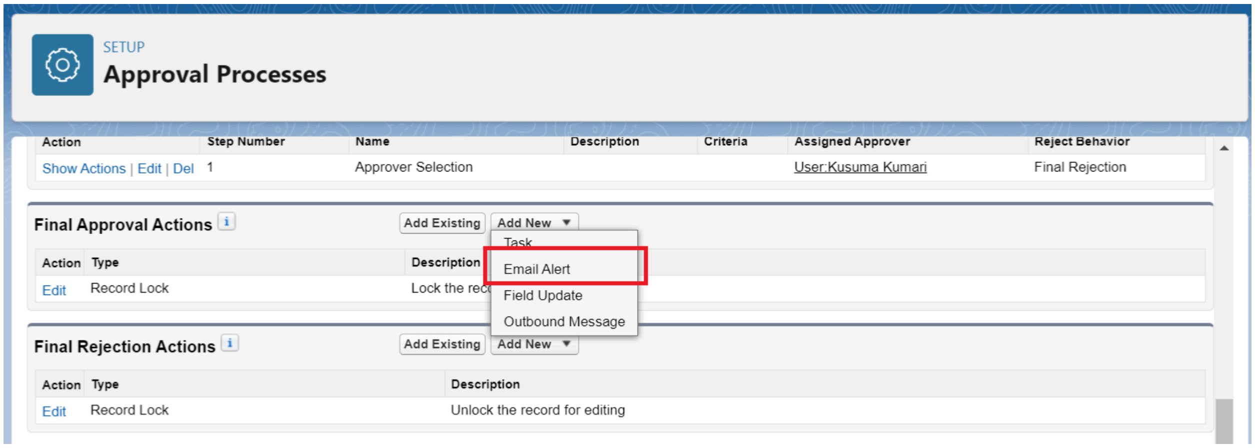
Step 28: Give your preferred name to the field update, select **Leave Approval Status** field from the picklist of **Field to Update** field, and check the checkbox of **Re-evaluate Workflow Rules after Field Change**.

Step 29: Select **Vacation Leave Approved** from the picklist of **A specific value** field under **Specify New Field Value** section.



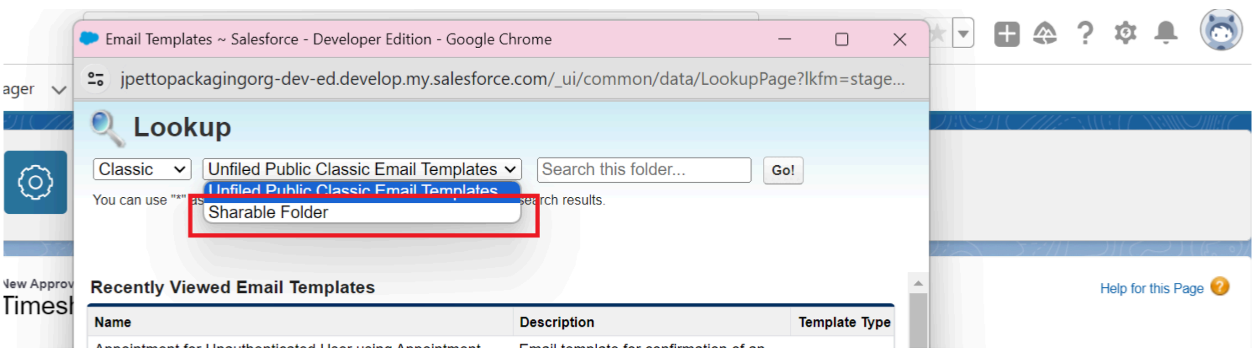
Step 30: Click **Save**.

Step 31: Go back to the approval process detail page to add actions and approval steps, Select **Email Alert** option from the **Add New** drop-down of **Final Approval Actions** section.

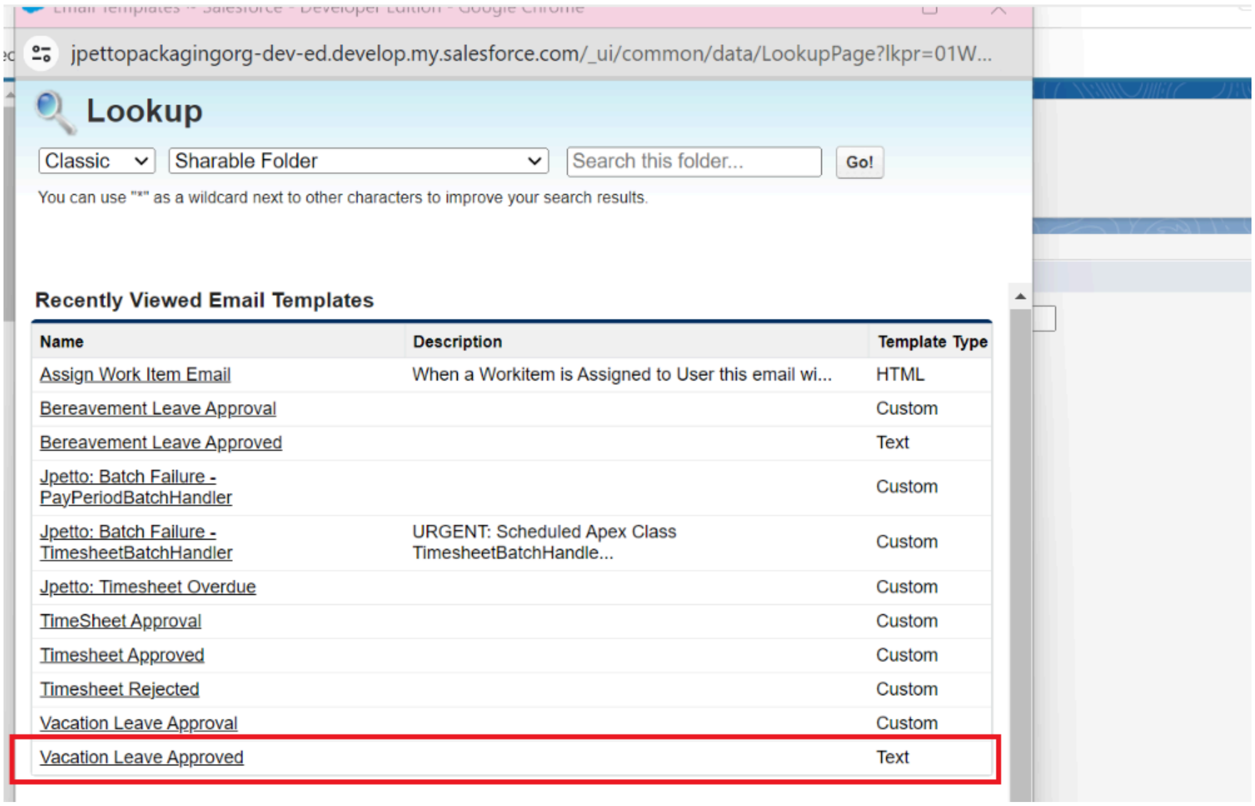


Step 32: Give your preferred name to the email alert, and click on the **Lookup** of **Email Template** field.

Step 33: On the pop-up screen select **Classic** from the drop-down, **Shareable Folder** from the drop-down.



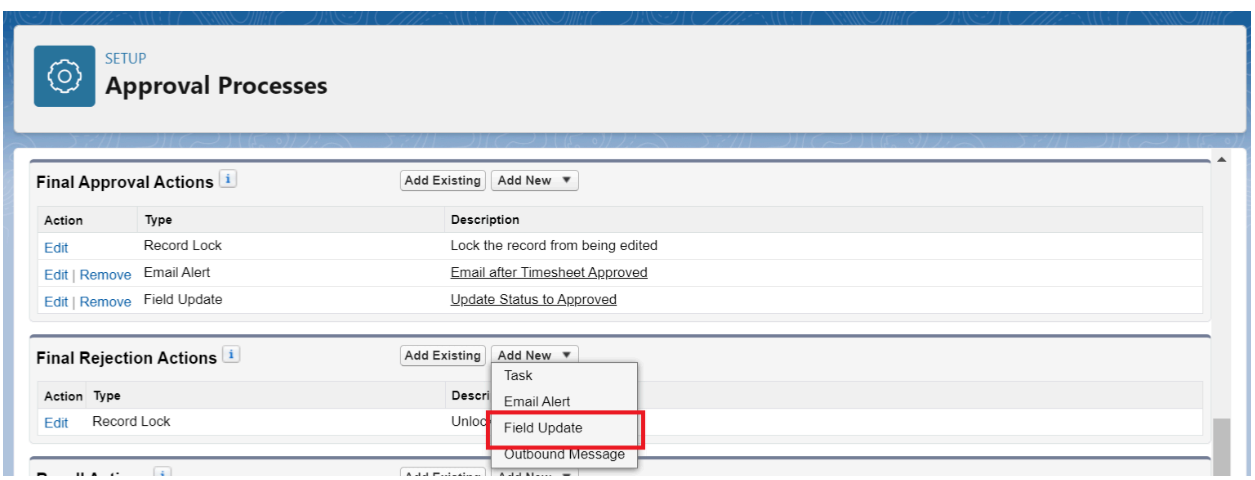
Step 34: Select **Vacation Leave Approved** email template from the list.



Step 35: Remove all the users added in the **Selected Recipients** and add the **Record Creator** to it.

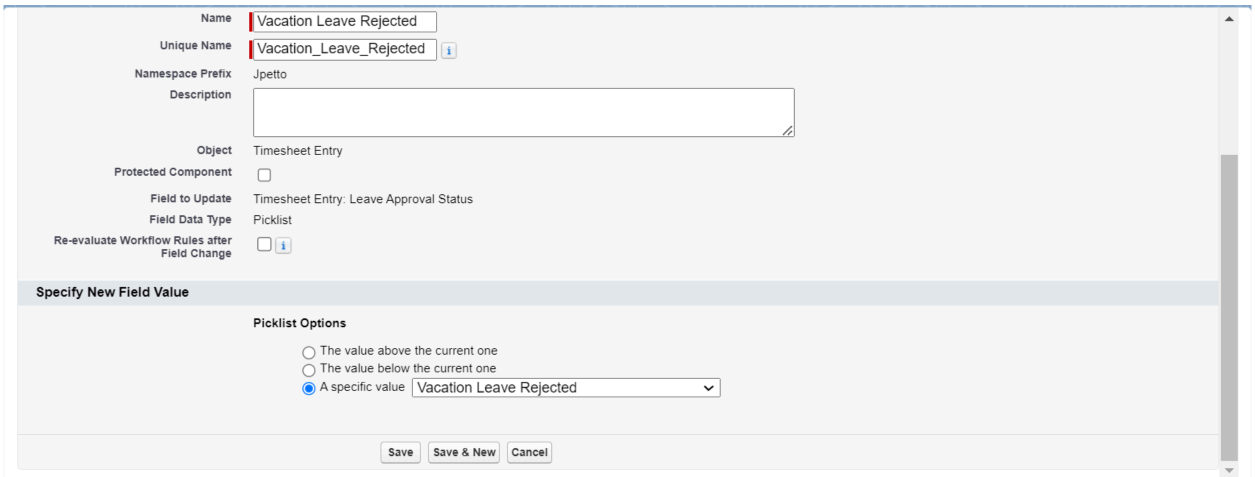
Step 36: Click **Save**.

Step 37: Go back to the approval process detail page to add actions and approval steps, Select **Field Update** option from the **Add New** drop-down of **Final Rejection Actions** section.



Step 38: Give your preferred name to the field update, select **Leave Approval Status** field from the picklist of **Field to Update** field, and check the checkbox of **Re-evaluate Workflow Rules after Field Change**.

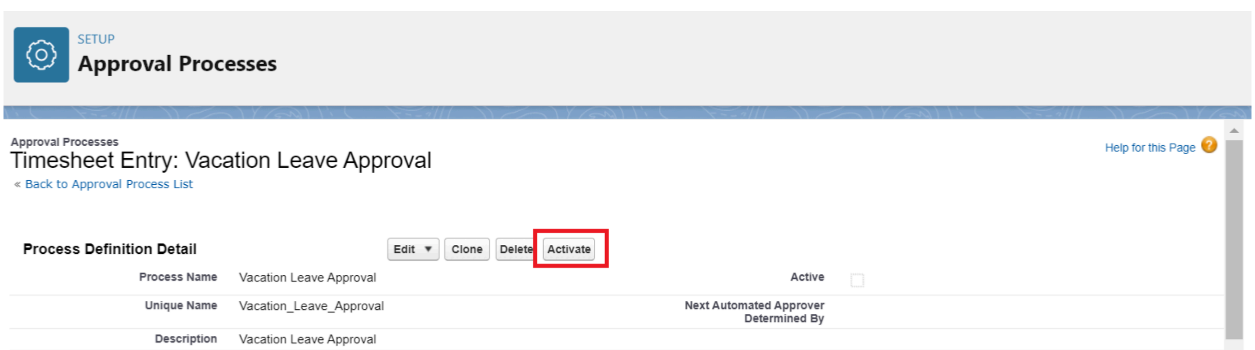
Step 39: Select **Vacation Leave Rejected** from the picklist of **A specific value** field under **Specify New Field Value** section.



Step 40: Click **Save**.

Step 41: Go back to the approval process detail page to activate it.

Step 42: Click on the **Activate** button.



Now, the approval process is activated and ready to use.

Validation Rules

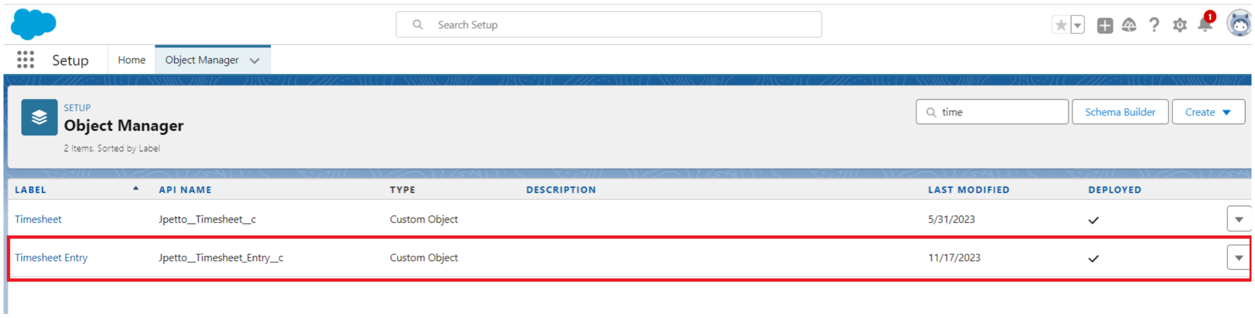
Below are a few of the validation rules for user's knowledge to set up as per their preferences.

Admins/Project Managers can set the validation rules below in their orgs as per the business requirement.

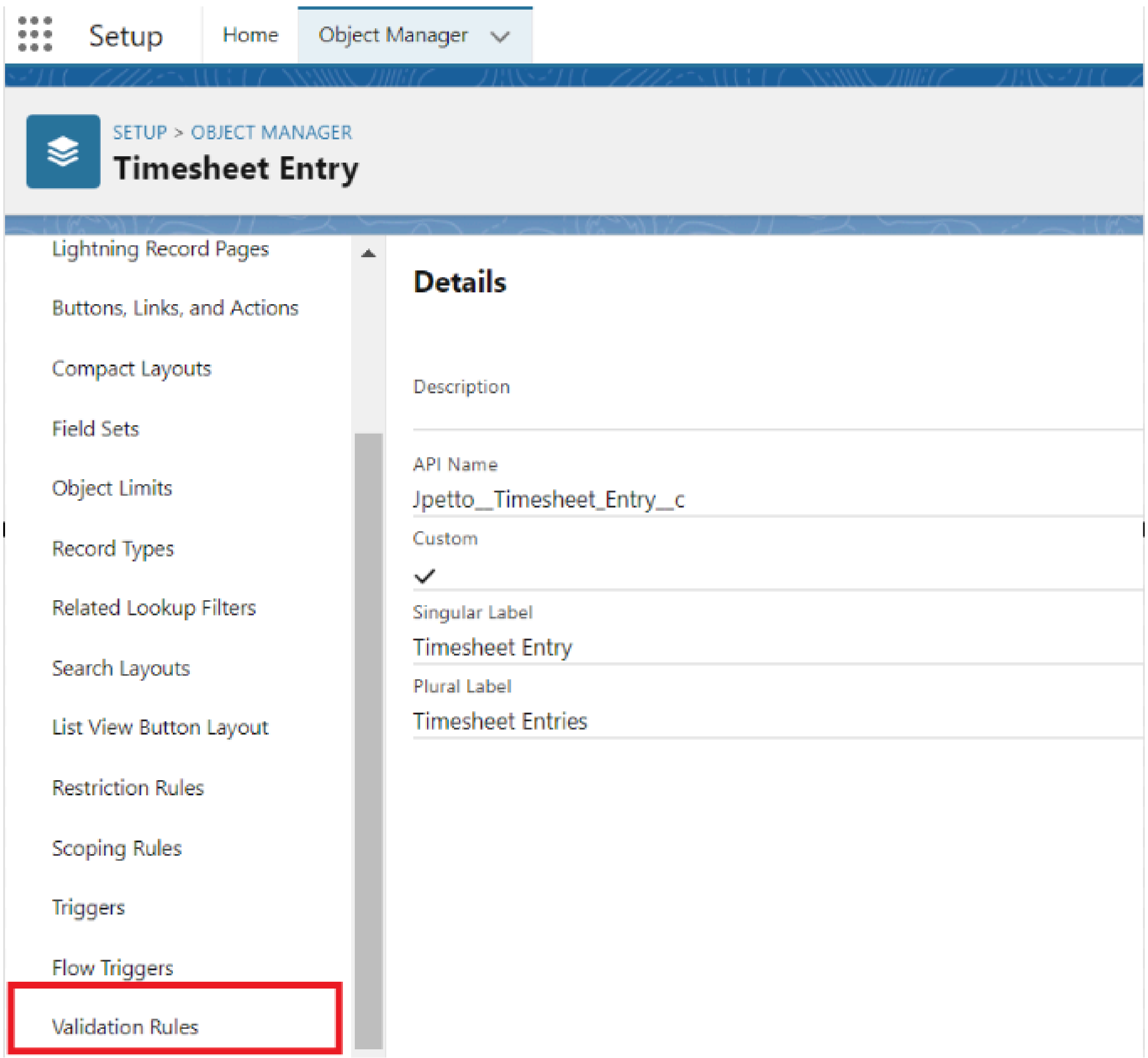
1. **Validation rule to restrict users/employees from logging zero hours of timesheet entry.**

To add this rule follow the below procedure:

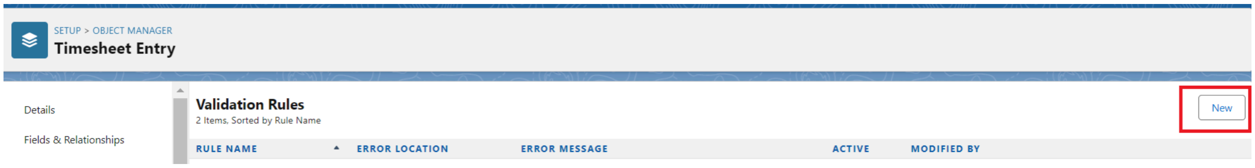
Step 1: From **Object Manager** select the **Timesheet Entry** object.



Step 2: Click on the **Validation Rule** section in the list.



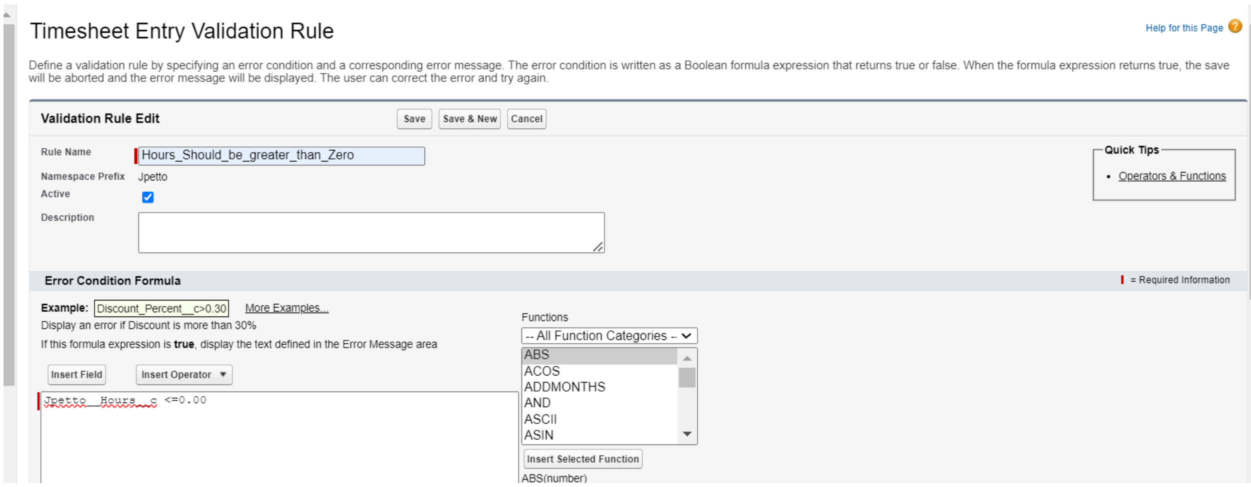
Step 3: Click on the **New** button.



Step 4: Enter the preferred name under **Rule Name**.

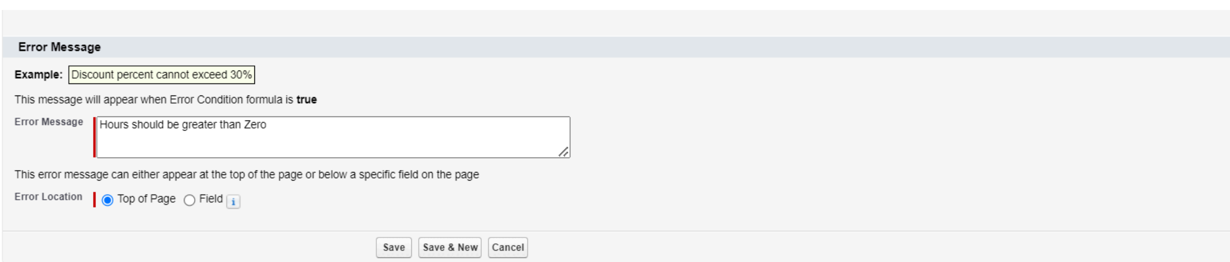
Step 5: Add the formula mentioned below to the **Error Condition Formula** section.

Formula: Jpetto__Hours__c <=0.00



Step 6: Enter the below message under the **Error Message** section.

Message: Hours should be greater than Zero



Step 7: Save the validation rule.

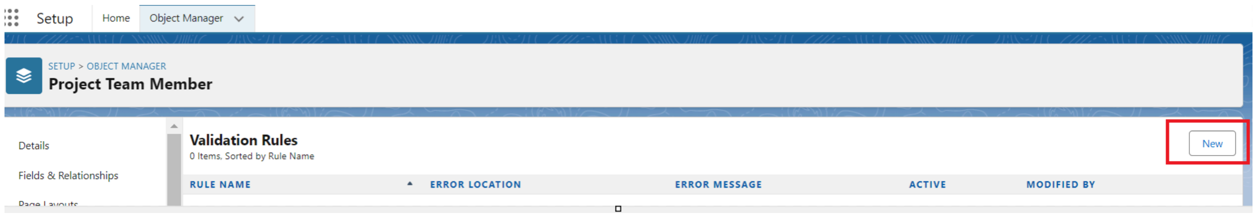
2. **Validation rule to restrict the users from adding both internal and external team members to the same record.**

   To add this rule follow the below procedure:

   Step 1: From **Object Manager** select the **Project Team Member** object.

Step 2: Click on the **Validation Rule** section in the list.

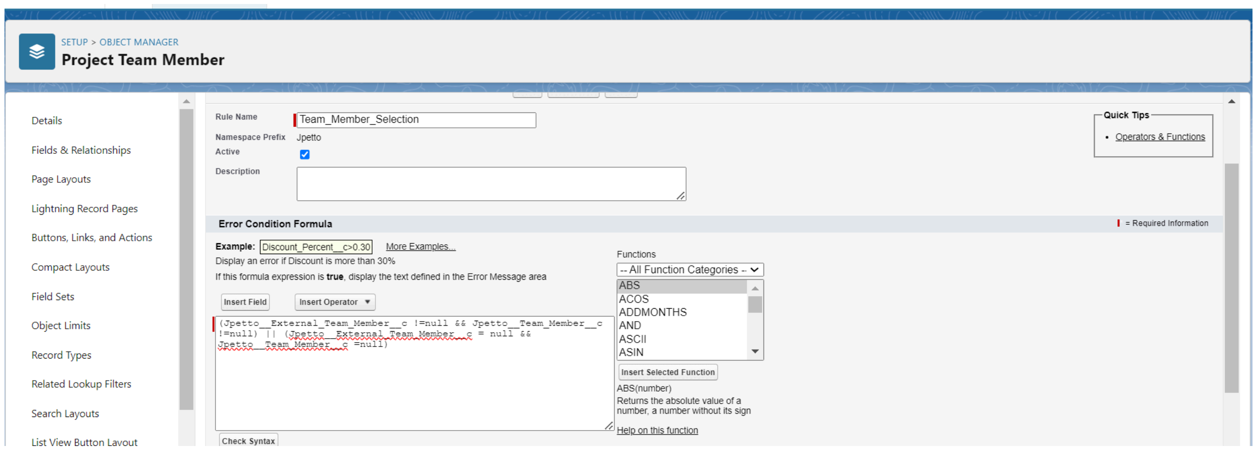
Step 3: Click on the **New** button.



Step 4: Enter the preferred name under **Rule Name**.

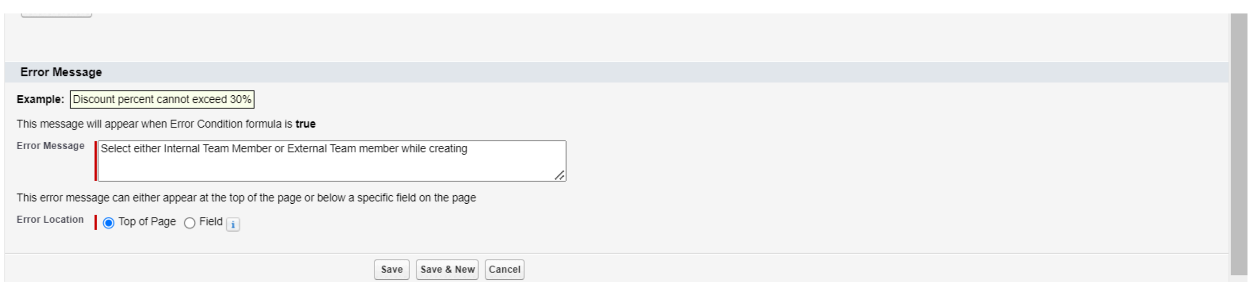
Step 5: Add the formula mentioned below to the **Error Condition Formula** section.

Formula: (Jpetto__External_Team_Member__c !=null && Jpetto__Team_Member__c !=null) || (Jpetto__External_Team_Member__c = null && Jpetto__Team_Member__c =null)



Step 6: Enter the below message under the **Error Message** section.

Message: Select either an Internal Team Member or an External Team member while creating

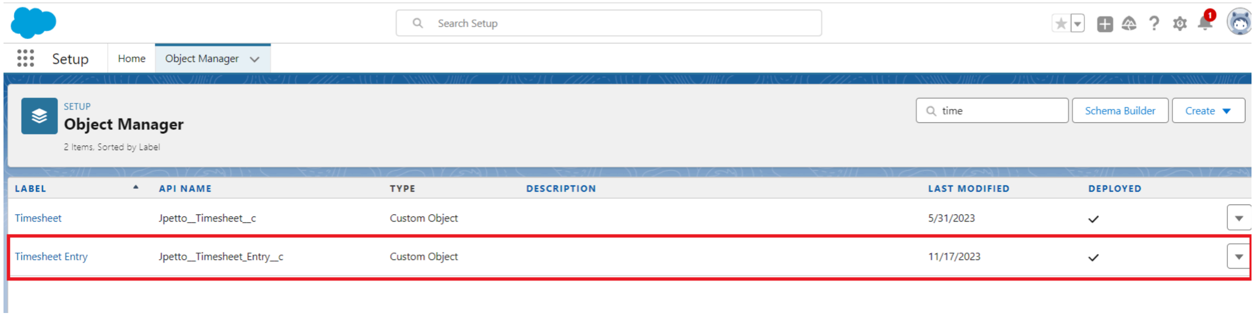


Step 7: Save the validation rule.

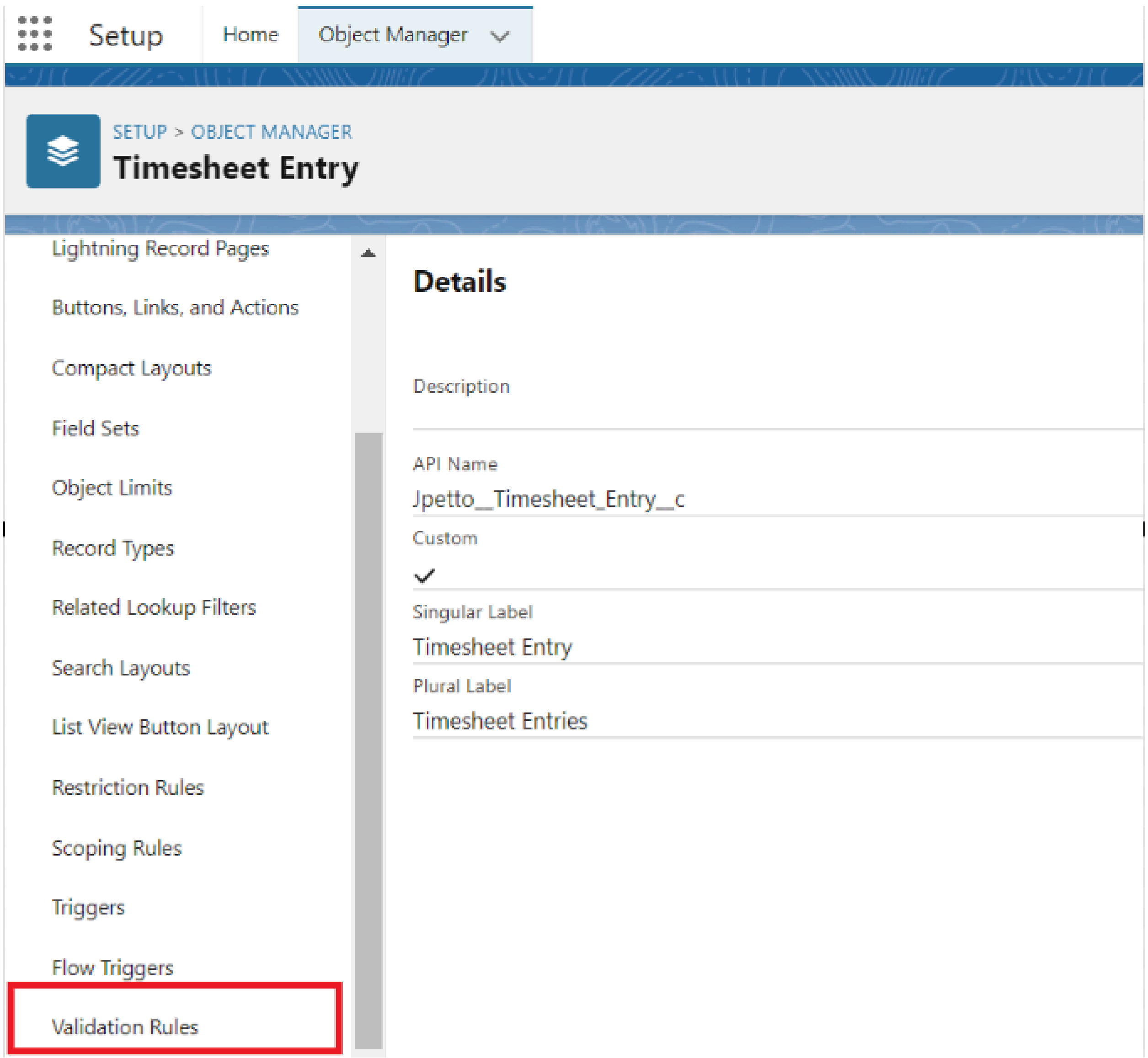
3. **Validation rule to restrict users/employees to log timesheet entries in the future.**

   To add this rule follow the below procedure:

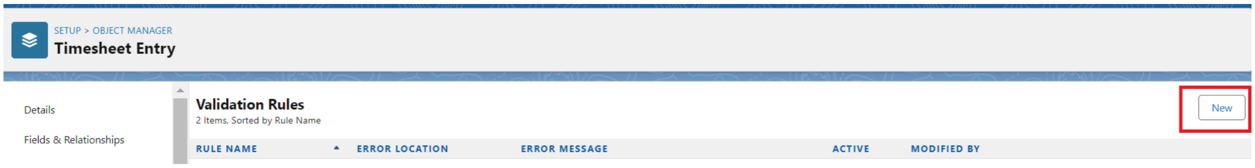
Step 1: From **Object Manager** select the **Timesheet Entry** object.



Step 2: Click on the **Validation Rule** section in the list.



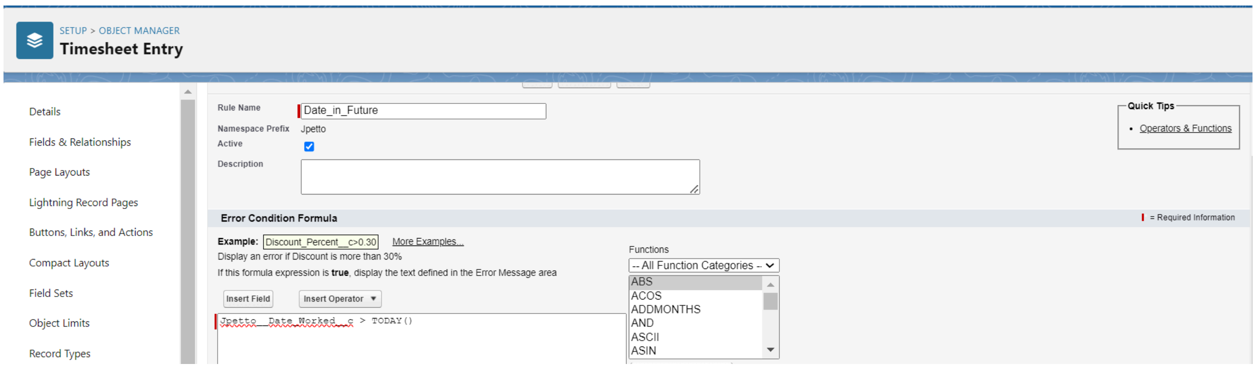
Step 3: Click on the **New** button.



Step 4: Enter the preferred name under **Rule Name**.

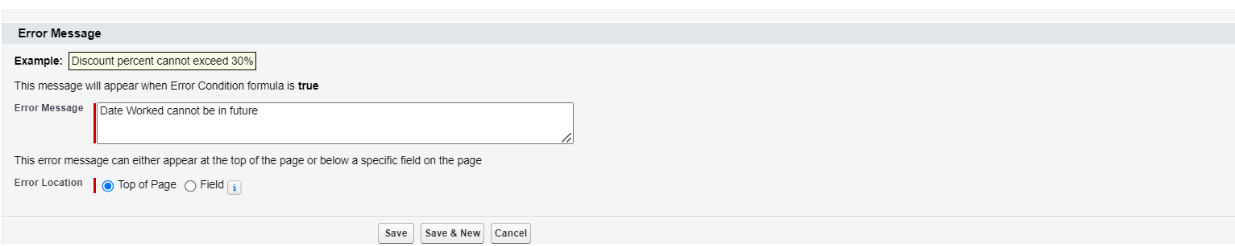
Step 5: Add the formula mentioned below in the **Error Condition Formula** section.

Formula: Jpetto__Date_Worked__c > TODAY()



Step 6: Enter the below message under the **Error Message** section.

Message: Date Worked cannot be in the future



Step 7: Save the validation rule.

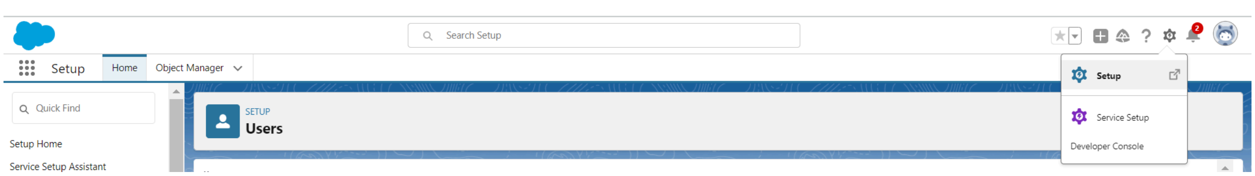
Run batch class in anonymous mode

Batch classes can be run manually by organization administrators instantly as per the requirement without waiting until the scheduled job runs.

Follow the below steps to run the batch class manually:

1. **PayPeriodBatchClass**

Step 1: Open **Developer Console** in salesforce org.



Step 2: Click on **Open Execute Anonymous Window** from the “Debug” dropdown.

Step 3: Place the below code on the pop-up window to run the **PayPeriodBatchClass**

```
Jpeto.PayPeriodBatchHandler payBatch= new Jpeto.PayPeriodBatchHandler();
Id payBatchId= Database.executeBatch(payBatch);
```

Step 4: After clicking on the **Execute** button the batch class will run.

2. **TimesheetBatchClass**

   To run the **TimesheetBatchClass** manually, repeat the steps mentioned in "PayPeriodBatchClass" by replacing the below code in Step 3.

```
Jpeto.TimesheetBatchHandler timeBatch= new Jpeto.TimesheetBatchHandler();
Id timeBatchId= Database.executeBatch(timeBatch);
```

Salesforce Path

What is Path, and why would I want to use it?

Salesforce Path is a feature that provides a visual representation of the stages a record progresses through in a Salesforce process. It appears in a chevron diagram at the top of a record's detail page and guides users through each stage of the process. Users can easily understand where a record stands in the process at a glance. Jpetto users may find it helpful to use on the Project and Work Item pages to show what their current statuses are.

How to Set up Path

1. In Salesforce Setup, search for and click Path Settings. If the 'Enable Path' button appears click it. Click 'New Path'.
2. Name the Path, select the object (Project or Work Item), and record type. It is important to note that the path will only appear on record pages that have this record type. For example, on the Project page, find the 'Record Type' field. If the record type chosen for the Path does not match this record type, the path will not appear on that page.
3. Select 'Status' from the picklist field and click 'Next'. Path can be based on any picklist field (the picklist values will display from left to right, following how they are ordered in setup).
4. For each stage, configure the relevant picklist fields that need to be displayed. These fields will be editable directly from the Path.
5. Click Next
6. Click to activate the path, and then click Finish.
7. Next, navigate to the record page, and select 'edit page' from the gear icon.
8. Drag the 'Path' component onto the record layout.

9. Click Save, then click Activation, Assign as Org Default, select the appropriate form factor, click Next, then Save.
10. Click the back arrow at the top left to return to the record page.
11. The path should now appear on the page (you may need to refresh the page).

Adding the New Task Button

The **New Task** button allows a task to be created directly from the Work Item page without leaving the page. If the New Task button does not appear on the Work Item page, follow the below steps to add it.

1. From Setup, enter Global Actions in the Quick Find box, then select Global Actions.
2. Click ‘Edit’ next to New Task
3. Set the record type to Default.
4. Note that if there is no default record type, then one will need to be created as follows:
    - From the Object Manager select the Task object.
    - Click ‘Record Types’
    - Click ‘New’
    - Enter ‘Default’ for Record Type Label (Record Type Name autofills)
    - Click ‘Next’
    - Click ‘Save’

How to use Lightning Console with Platform Starter

Salesforce Lightning Console provides a dynamic workspace for optimizing customer interactions and workflows within the Salesforce ecosystem. It is available as an add-on feature or included with select license types such as Service Cloud, catering to diverse business needs and preferences.If your org has purchased Lightning Console permission set licenses, you can assign the licenses to users with Salesforce Platform licenses to add access to Lightning console apps as described below. For more details on Salesforce Lightning Console licensing, you can refer to the official Salesforce documentation here:
https://help.salesforce.com/s/articleView?id=sf.console_lex_intro.htm&type=5.
Once you have acquired the license, it will appear as described below.

1. Create permission set with lightning console user permission
    - From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
    - Click New.

- Enter Lightning Console for the name.
- From the License dropdown menu, select Lightning Console.
- Click Save.

The Permission Set Overview page shows the new permission set. Now add user permissions to the set.

- Click System Permissions to open the list of user permissions enabled by the Lightning Console permission set. Then click Edit.
- Enable Lightning Console User.
- Click Save.

2. Assign to users

- Click Manage Assignments and then click Add Assignments.
- Select the users with Salesforce Platform licenses who need access to Lightning console apps, then click Done.
- When you assign the permission set to users, Salesforce auto-assigns the Lightning Console permission set license to those users.
- After you assign the permission set, make sure to add the user's profile to the Lightning console app. Go to App Manager in Setup and edit the Lightning console app.

How to Add Users

Follow the below steps to add a user to your salesforce org.

1. From Setup, enter 'Users' and click on "Users."
2. Click on the "New User" button at the top of the page to create a new user.
3. Fill in the required user information such as First Name, Last Name, Email, Username, and Profile.
4. Assign a Role to the user if necessary. Roles determine what data the user can access in Salesforce.
5. Optionally, assign a Permission Set to grant additional permissions to the user beyond what is defined in their Profile.
   a. Scroll down to the "Permission Set Assignments" section and click "Edit Assignments." Here you can assign permission sets to the user.
   b. Check the box next to the permission set(s) you want to assign to the user. Permission sets extend the user's permissions beyond what is defined in their profile, granting additional access or functionality.

    c. After selecting the appropriate permission sets, click "Save" to apply the assignments.
6. Set the user's License type, which determines the features and functionality available to the user.
7. Define the user's time zone and locale settings as needed.
8. Configure any additional settings or permissions for the user based on your organization's requirements.
9. Review the information entered for accuracy, then click "Save" to create the user.

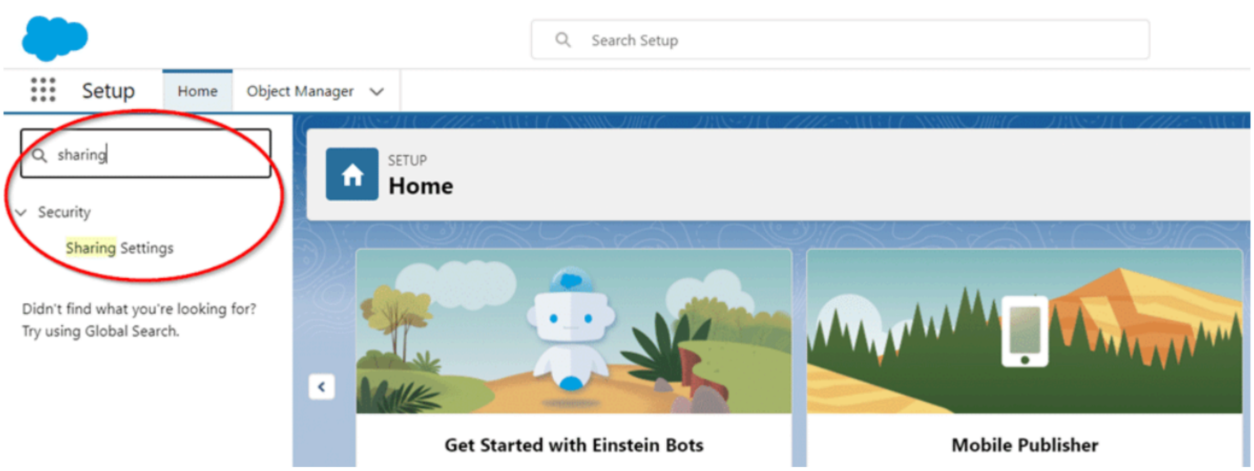
Sharing Rules

Sharing Rules allow you to share specific records with selected users or groups based on predefined criteria.Consider a scenario where there is a manager who is managing two teams: TeamA and TeamB. The manager can access records belonging to both teams via the role hierarchy method; however, what if TeamB wants to access records belonging to TeamA? This cannot be done through the role hierarchy method as both teams are at the peer level. Here we can use sharing rules to provide access.

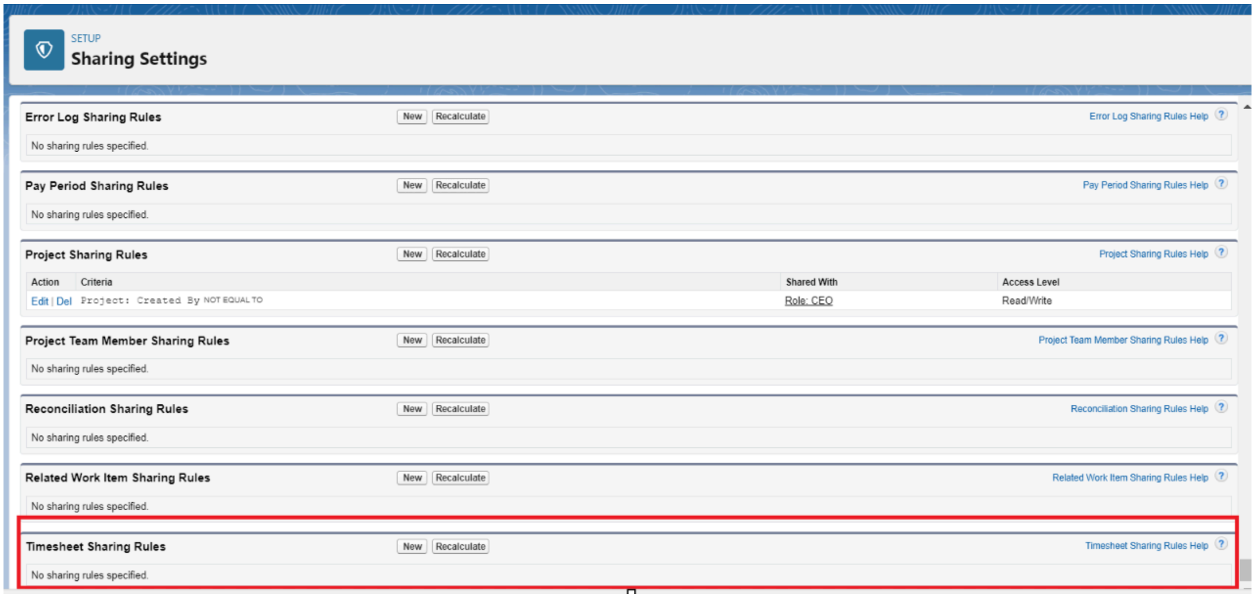
Note: If the Organization Wide Default (OWD) of an object is **Public or Public Read/Write** then there is no need to create sharing rules.

Creating a Sharing Rule to share timesheets owned by other users in Salesforce:

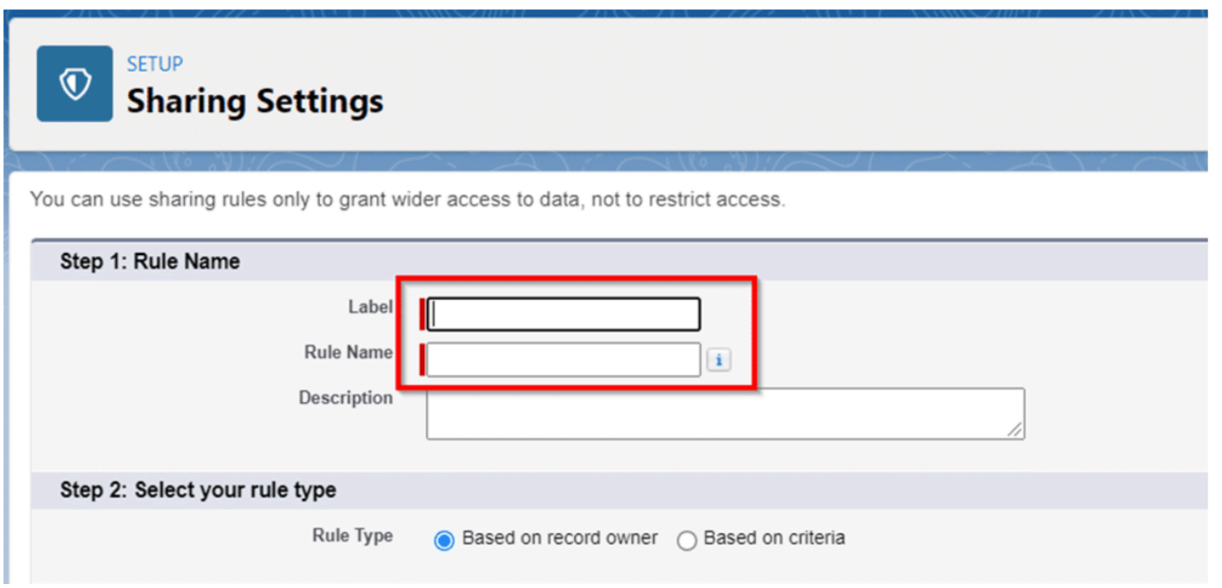
Step 1: Go to Sharing Settings, which can be found under the Quick Find section.



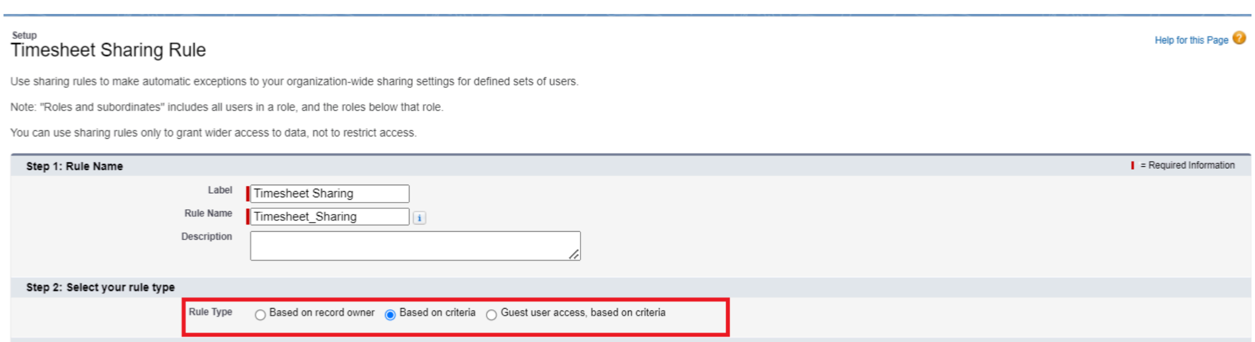
Step 2: Scroll down to the **Timesheet** object, and then click on New to create a new sharing rule.



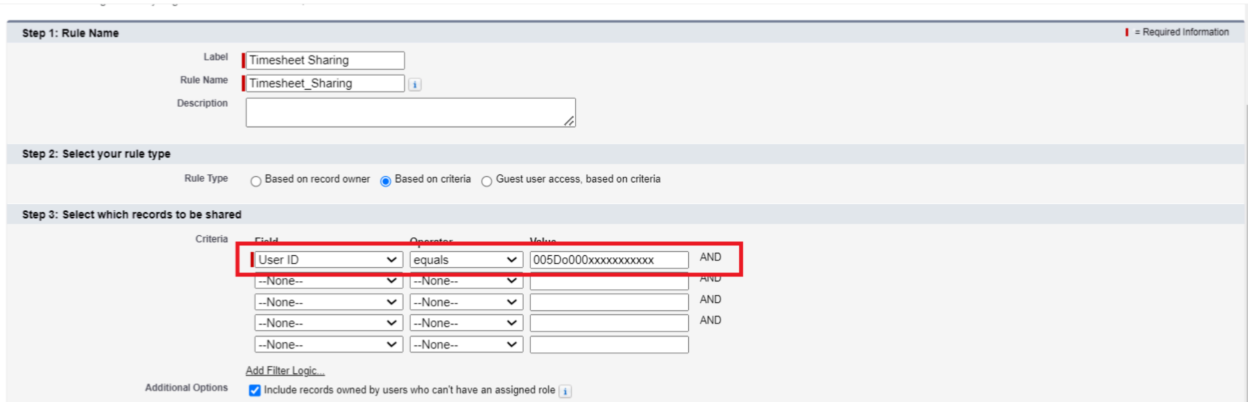
Step 3: Add the label of the sharing rule you want to create.



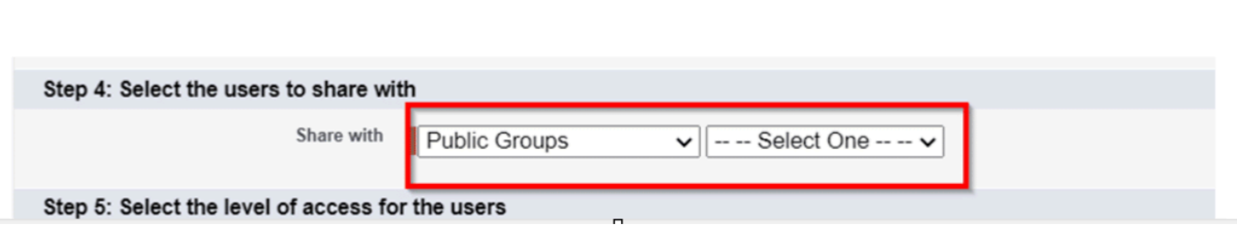
Step 4: Choose ‘based on criteria’ for the rule type.



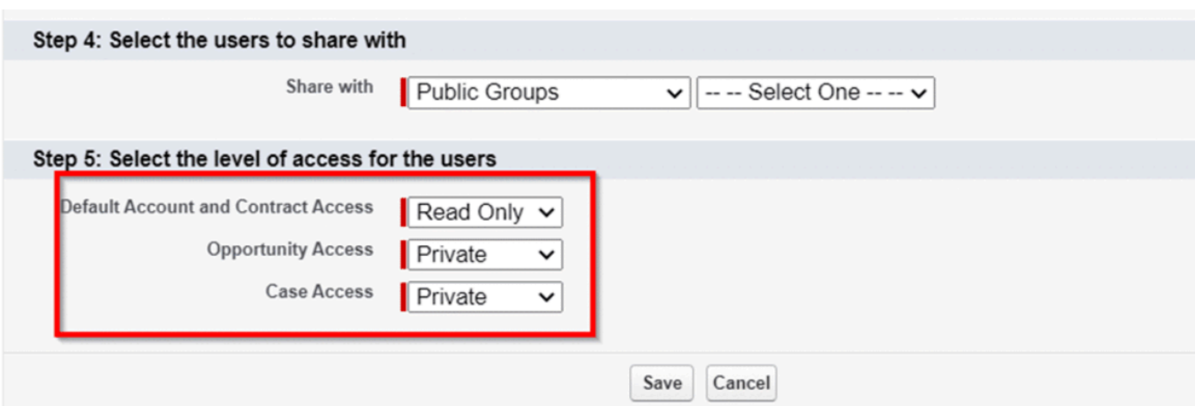
Step 5: Copy the 15 or 18-digit User Id of the user whose timesheet access needs to share and update the criteria as shown in below figure.



Step 6: Select the users with whom the records are to be shared.



Step 7: Finally, select the level of access to be provided, and click on Save.



Your sharing rule is now created.