

Jpetto Project Manager

Salesforce Installation & User Guide



P.O. Box 1085 Woodbury, CT 06798

Table of Contents

Quick Info

App Details	4
Package Contents	4
Lightning Components	4
Languages	4
Getting Started	4
Product Overview	4

Jpetto Quick Start

Steps to Access Jpetto	5
Supported Salesforce Objects	6
Jpetto Schema	7
Permission Sets	7
Additional Permission Sets of Jpetto	8

Jpetto Objects & Fields

Account (Standard Object)	8
Contact (Standard Object)	9
Discount, Credit, or Expense (Custom Object)	10
Error Log (Custom Object)	10
Opportunity (Standard Object)	10
Pay Period (Custom Object)	11
Project (Custom Object)	11
Project Team Member (Custom Object)	12
Related Work Item (Custom Object)	13
Sprint (Custom Object)	13
Timesheet (Custom Object)	14
Timesheet Entry (Custom Object)	15
User (Standard Object)	16
Work Item (Custom Object)	17

Record Creation in Jpetto

Creating an Account	19
Creating a Project	20
Creating a Project Team Member	21
Creating a Work Item	22
Creating a Sprint	25
Creating a PayPeriod	26
Creating a Timesheet	29
Creating a Timesheet Entry	35
Creating a Related Work Item	36
Creating a Discount, Credit, or Expense	37

Additional Amazing Features of Jpetto	40
Batch Job Failure Notification	40
Enabling Debug Statements in Logs	42
Non-Billable Timesheet Entries	43
Enable/Disable Triggers	45
Allotting Vacation Days for Employees	46
Vacation Hours settings	48
Vacation Leave Approval Request	50
Consumed Hours Component	52
Assign Work Item with Quick Action	53
Setting Up Salesforce with Google Single Sign-On (SSO)	56
Share Access from Project Team Members	68
Disable Show Error Message on Delete WorkItems flow	69
Communication Templates for Batch Failures	70
Restrict to add duplicate PTM (Project Team Members)	70
Jpetto Approval Processes	
Timesheet Approval Process	71
Bereavement Leave Approval	82
Vacation Leave Approval	91
Tutorials	
Validation Rules	101
Run batch class in anonymous mode	106
Salesforce Path	107
What is Path, and why would I want to use it?	107
How to Set up Path	107
Adding the New Task Button	108
How to use Lightning Console with Platform Starter	108
How to Add Users	109
Sharing Rules	110

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

Custom Objects: 14

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.

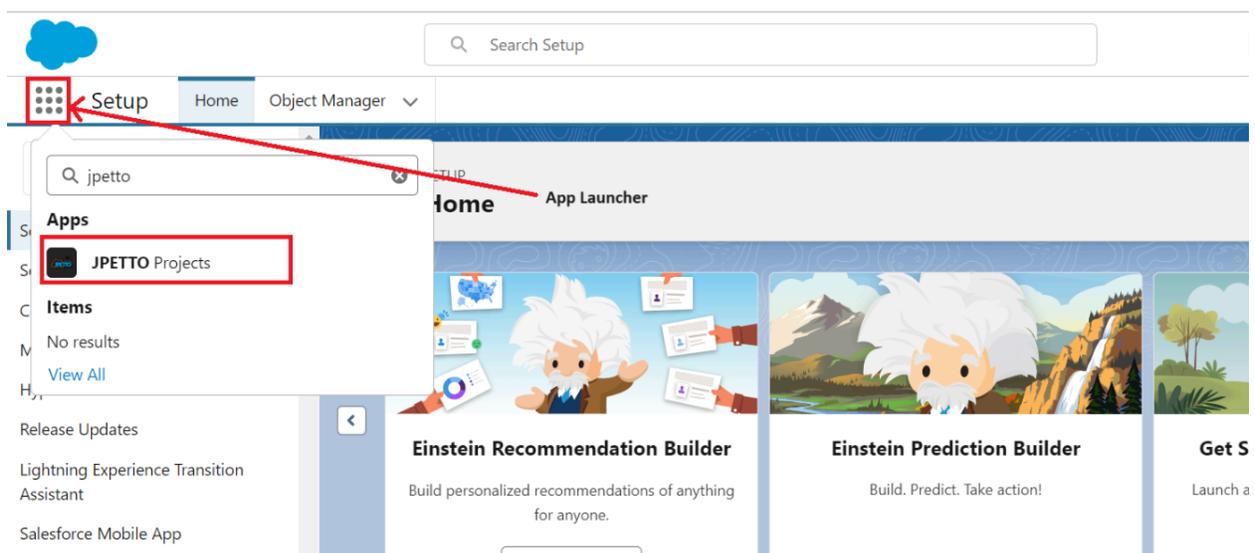
Product Overview

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

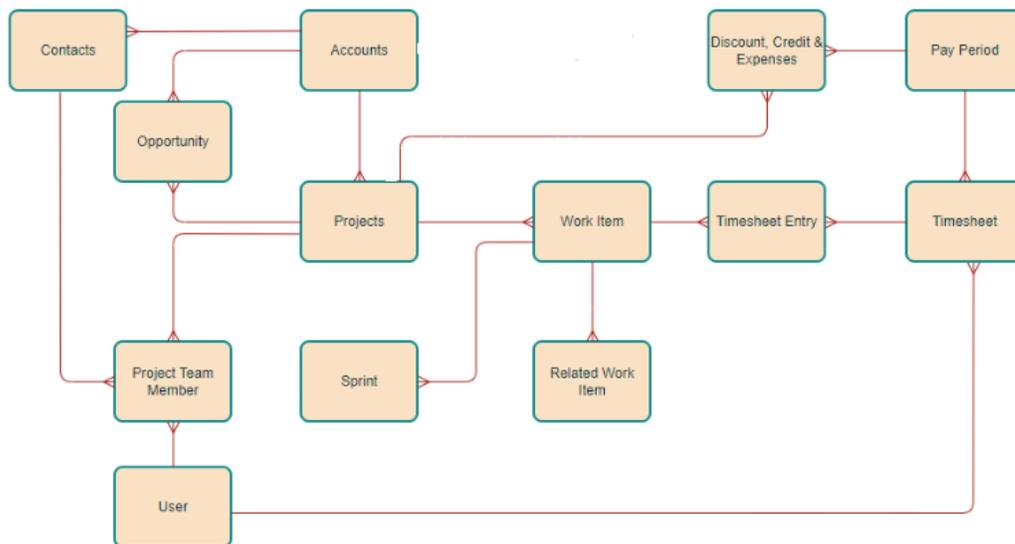
1. Install the Jpetto package into your Salesforce org.
2. Assign the Jpetto package licenses to the required users on Salesforce org.
3. Open App Launcher. In the search box, type **Jpetto** then click on the **Jpetto Projects** displayed as shown in the image below.



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



I

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 <ul style="list-style-type: none"> • 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.

Details:

- **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.

New Account

* = Required Information

Account Information

<p>* Account Name ↶ <input type="text" value="Test Account"/></p> <p>Parent Account <input type="text" value="Search Accounts..."/> 🔍</p> <p>Account Number <input type="text"/></p> <p>Type <input type="text" value="--None--"/> ▼</p>	<p>Phone <input type="text"/></p> <p>Fax <input type="text"/></p> <p>Website <input type="text"/></p> <p>Status <input type="text" value="--None--"/> ▼</p>
--	---

Industry

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.

Project Overview

Salesforce Sans 12 B I U

Project Details

* Project Name Service Rate

* Client Account Status

Test Account Discovery

Cancel Save & New Save

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.

JPETTO Projects Projects

Projects All

1 item • Sorted by Project Name • Filtered by All projects • Updated a few seconds ago

Project Name	Record Type
1 Demo Project	Standard

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.

Project **Demo Project**

Kick-off Date	Anticipated Go-Live Date	Budgeted Hours (total)	Budgeted Hours Consumed (Total)	Hours Re
1/1/2024	1/9/2024		0.00	0.00

✓ Requirements ...
 Dev in Progress
UAT in Progress
Deployment P...
Post Go-Live S...
Backlogge

Details Work Items **Project Team**

Project Team Members (1) ⚙️ ↻ **New** Change Owner

1 item • Updated 14 minutes ago

<input type="checkbox"/>	Team Member	Role	Email	Active

- 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.

JPETTO Projects Projects Demo Project | Project

No past activity. Past meetings and tasks marked as done show up here.

Project Team Members (1) ⚙️ ↻ **New**

Chad Hammond

- 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.

Kick-off Date	Anticipated Go-Live Date	Budgeted Hours (total)	Budgeted Hours Consumed (Total)	Hours Remaining in Budget (Total)
1/1/2024	1/9/2024		0.00	0.00

Progress bar: Requirements ... Dev in Progress UAT in Progress Deployment P... Post Go-Live S... Backlogged Closed

Buttons: Edit, **New Work Item**, Clone, Delete

Button: Mark Status as Complete

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

New Work Item

Type

SELECT Type ▼

- Bug
- Change Request
- Epic
- Sub-task
- Support Ticket
- Task

Choose The File

[Upload Files](#) Or drop files

[Cancel](#) [Save](#)

- Enter the applicable fields and save the Work Item.

New Work Item

* Project

[Demo Project](#) ×

Sprint

Search... 🔍

Assignee User

[Kusuma Kumari](#) ×

* Severity

SELECT Severity ▼

Priority

[Cancel](#) [Save](#)

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

New Work Item

Type
SELECT Type ▼

Choose The File
[Upload Files](#) Or drop files

Cancel

Save

b. From New button on Work Item tab:

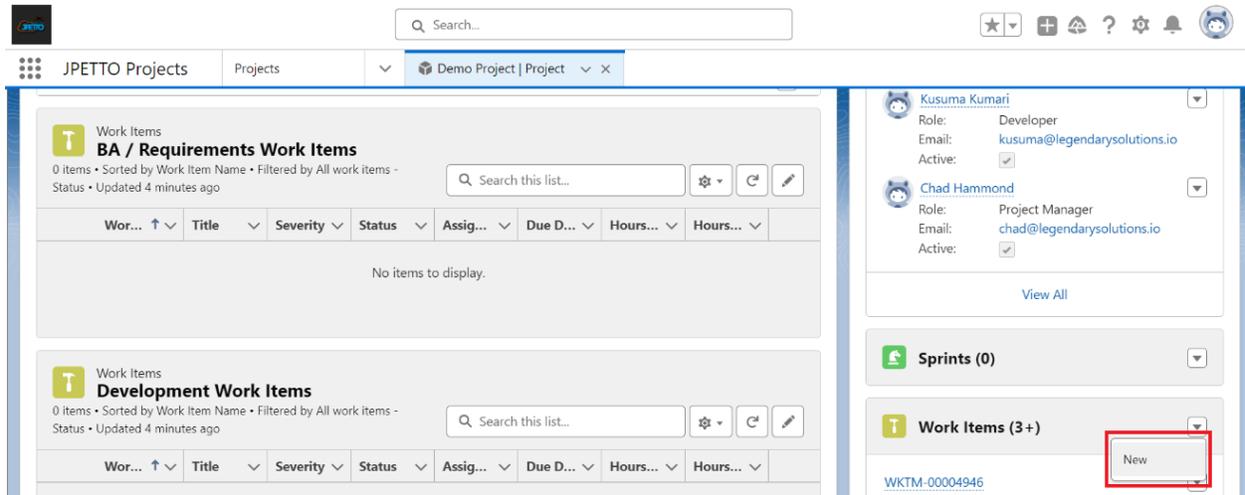
- Alternatively, you can create a new work item by clicking the New button on the list view of the work item tab.

The screenshot shows the JPetto Projects interface. At the top, there is a search bar and navigation icons. Below that, the 'Work Items' tab is selected. The main area displays a list of work items under the heading 'Work Items Recently Viewed'. The list contains five items with IDs: WKTM-00004951, WKTM-00004946, WKTM-00004950, WKTM-00004948, and WKTM-00004947. In the top right corner of the list view, there is a 'New' button highlighted with a red box, and an 'Import' button next to it.

- 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.

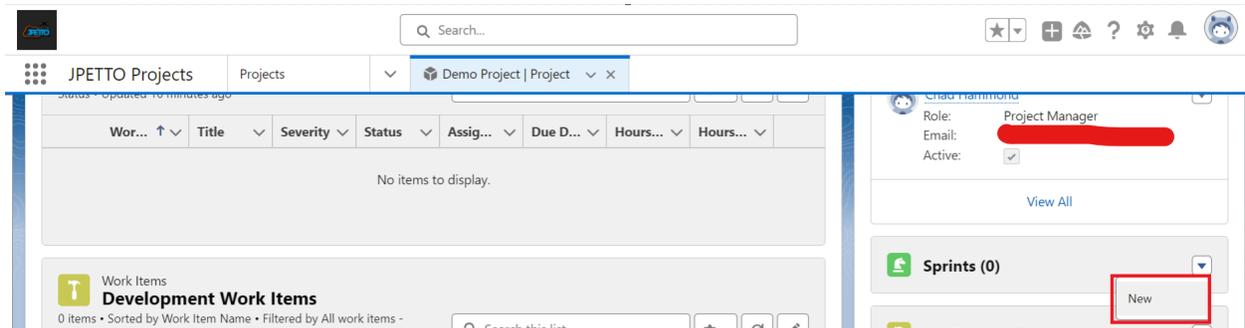


- Select the appropriate record type of the work item on the following screen.
- Enter the applicable fields and save the work item.

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.

Edit Demo Sprint

* = Required Information

Sprint Overview

* Project Client Account
 Demo Account
This field is calculated upon save

Status

* Sprint Name

Type

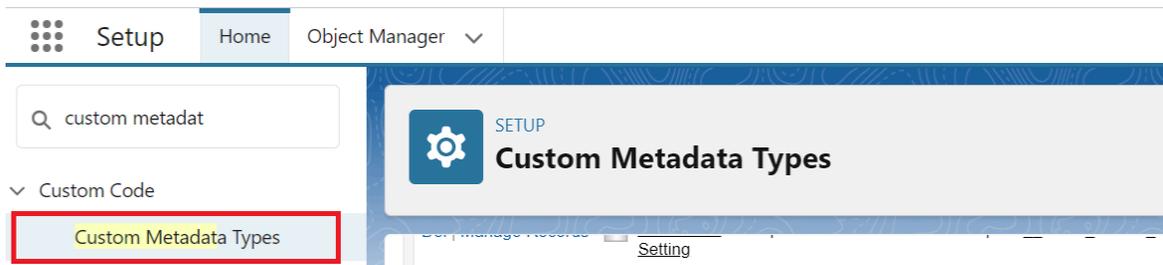
Timeline

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.

SETUP Custom Metadata Types							
Del Manage Records		Enable JPetto Debug	Jpetto	Public	Jpetto__Enable_JPetto_Debug__mdt	151	When true, Jpetto classes will display debug data in Apex Logs.
Del Manage Records		Non-Billable Timesheet Entry	Jpetto	Public	Jpetto__Non_Billable_Timesheet_Entry__mdt	151	This Metadata is used to store the Timesheet entry Type that needs to be Non-Billable
Del Manage Records		Pay Period Expiration Status	Jpetto	Public	Jpetto__Pay_Period_Expiration_Status__mdt	151	This value 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 Periods Timesheet. See Custom Metadata Type 'Timesheet Approval Status' for more info.
Del Manage Records		Pay Period Range	Jpetto	Public	Jpetto__Pay_Period_Range__mdt	154	The length of time that occurs within each Pay Period. *ONLY ONE ENTRY SHOULD EXIST AT ANY GIVEN TIME.

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

SETUP Custom Metadata Types

Custom Metadata Type
Pay Period Range (Managed) [Help for this Page](#)

This custom metadata type is managed. You can only edit certain attributes. [Display More Information](#)

Standard Fields [6] | Custom Fields [2] | Validation Rules [0] | Page Layouts [1]

Custom Metadata Type Detail

Manage Pay Period Ranges

Singular Label	Pay Period Range	Description	The length of time that occurs within each Pay Period. *ONLY ONE ENTRY SHOULD EXIST AT ANY GIVEN TIME.
Plural Label	Pay Period Ranges	Visibility	Public

- 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.

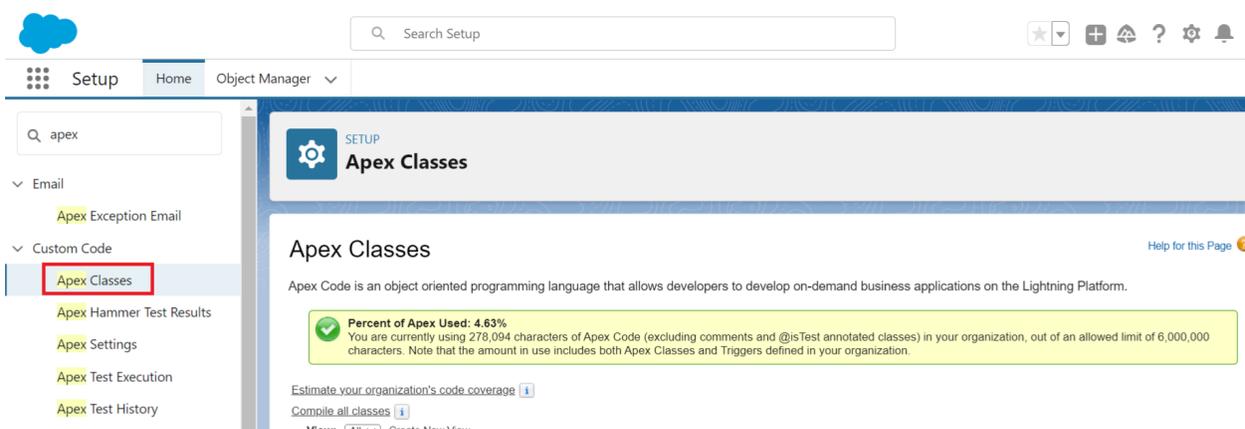
Solution: To solve the above problem, the organization admin has to update the “Default” record of the “Pay Period Range” custom metadata type object as below:

Range Type: Weekly

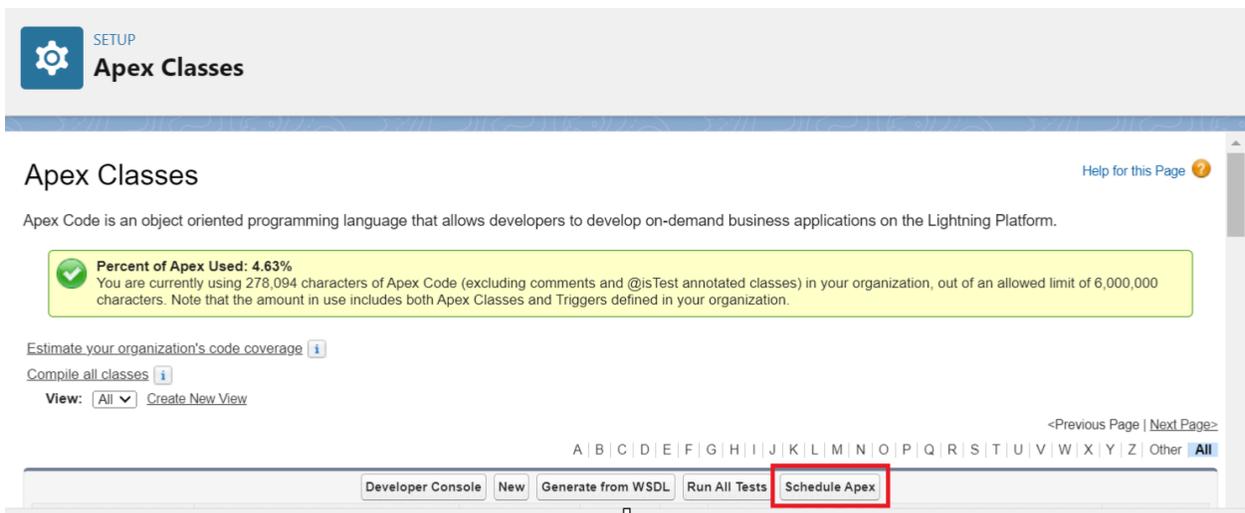
Range Duration: 1

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'.

SETUP
Apex Classes

Schedule Apex

Help for this Page

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Save Cancel

Job Name Pay Period Schedule

Apex Class PayPeriodBatchScheduler

Schedule Apex Execution

Frequency Weekly Monthly

Recurs every week on

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Start 12/12/2023 [12/12/2023]

End 1/12/2024 [12/12/2023]

Preferred Start Time [--None--]

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](#).

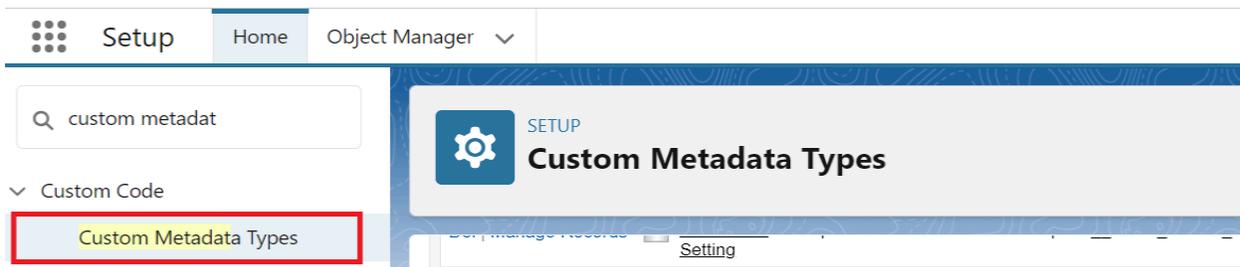
- The creation of Timesheet records is handled by the batch class in Jpetto. To enable the process, the admin has to schedule the respective batch class and update the custom metadata record as shown below.

Update/Create Custom Metadata Record:

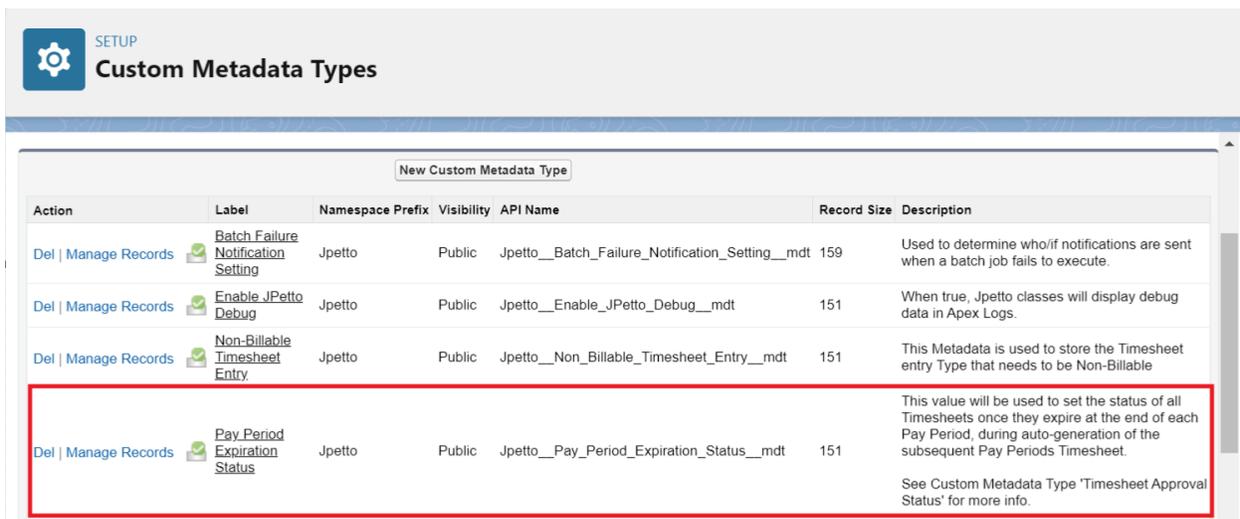
- Before scheduling the timesheet batch class, the admin needs to update/create two custom metadata types.
 1. Pay Period Expiration Status
 2. Timesheet Approval Status

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



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

This custom metadata type is managed. You can only edit certain attributes. [Display More Information](#)

[Standard Fields](#) [6] | [Custom Fields](#) [1] | [Validation Rules](#) [9] | [Page Layouts](#) [1]

Custom Metadata Type Detail

[Edit](#) [Manage Pay Period Expiration Statuses](#)

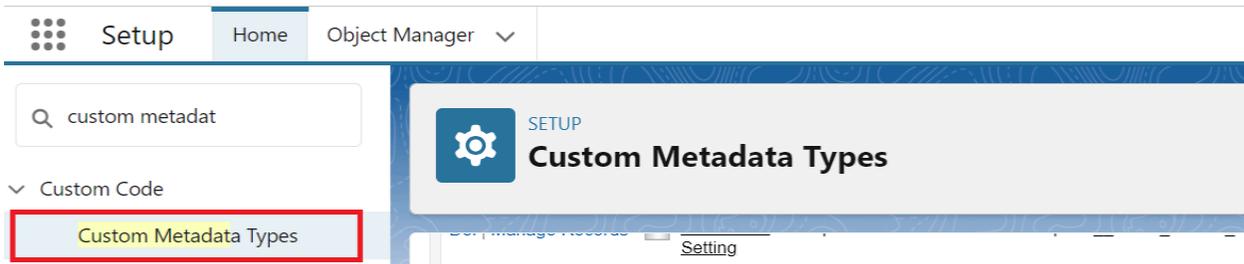
Singular Label Pay Period Expiration Status

Description This value 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 Periods Timesheet.
See Custom Metadata Type 'Timesheet Approval Status' for more info.

- 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.

SETUP
Custom Metadata Types

Del Manage Records	Pay Period Expiration Status	Jpetto	Public	Jpetto__Pay_Period_Expiration_Status__mdt	151	This value 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 Periods Timesheet. See Custom Metadata Type 'Timesheet Approval Status' for more info.
Del Manage Records	Pay Period Range	Jpetto	Public	Jpetto__Pay_Period_Range__mdt	154	The length of time that occurs within each Pay Period. *ONLY ONE ENTRY SHOULD EXIST AT ANY GIVEN TIME.
Del Manage Records	Pay Period Setting	Jpetto	Public	Jpetto__Pay_Period_Setting__mdt	161	
Del Manage Records	Timesheet Approval Status	Jpetto	Public	Jpetto__Timesheet_Approval_Statuses__mdt	151	Entries into this Metadata type 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.

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

Custom Metadata Type

Timesheet Approval Status (Managed)

[Help for this Page](#)

This custom metadata type is managed. You can only edit certain attributes. [Display More Information](#)

[Standard Fields \[6\]](#) | [Custom Fields \[1\]](#) | [Validation Rules \[0\]](#) | [Page Layouts \[1\]](#)

Custom Metadata Type Detail

[Edit](#) [Manage Timesheet Approval Statuses](#)

Singular Label Timesheet Approval Status

Description Entries into this Metadata type 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.

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

SETUP
Custom Metadata Types

Timesheet Approval Statuses

[Help for this Page](#)

View: [All](#) [Create New View](#)

[New](#)

Action	Label ↑	Timesheet Approval Status Name	Namespace Prefix
--------	---------	--------------------------------	------------------

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.

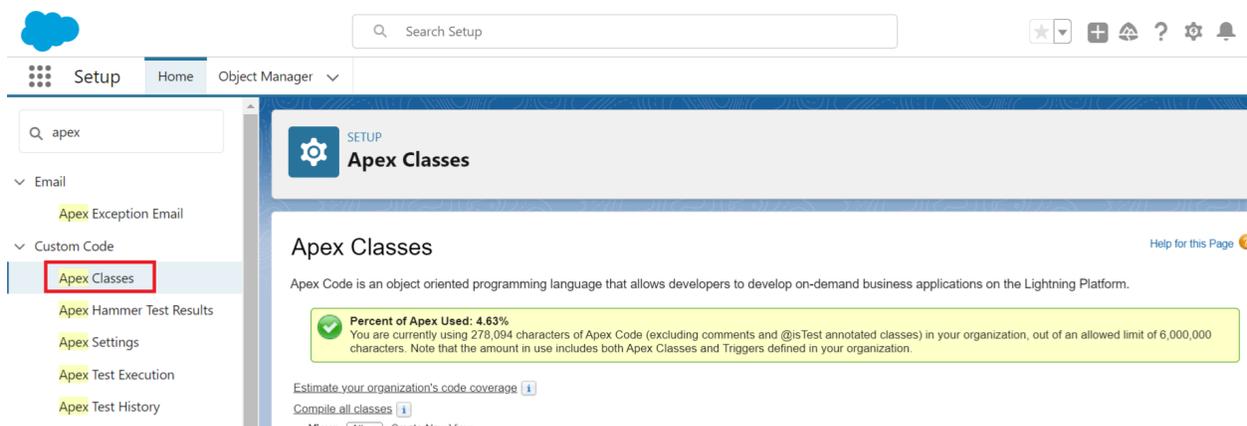
Solution: To solve the above problem the organization admin has to

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.

Apex Classes

Help for this Page ?

Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Lightning Platform.

Percent of Apex Used: 4.63%
You are currently using 278,094 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Estimate your organization's code coverage [i](#)

Compile all classes [i](#)

View: [All](#) [Create New View](#)

<Previous Page | [Next Page](#)>

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other [All](#)

Developer Console | New | Generate from WSDL | Run All Tests | **Schedule Apex**

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 **Rekurs 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’.

Schedule Apex

Help for this Page ?

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Save Cancel

Job Name

Apex Class [🔍](#)

Schedule Apex Execution

Frequency Weekly Monthly

Rekurs every week on

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Start [

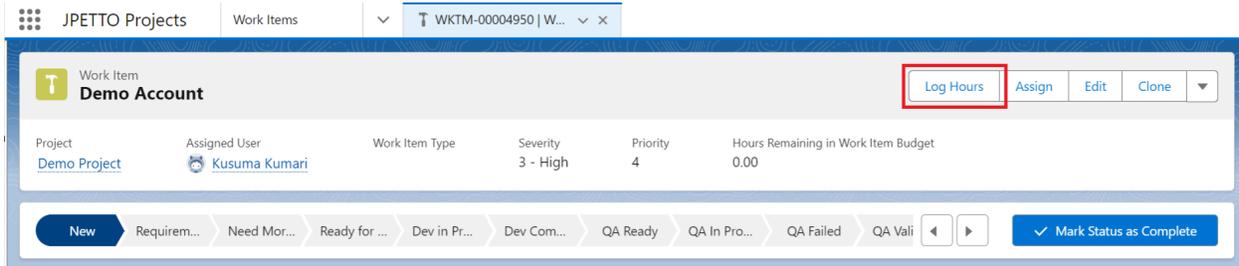
End [

Preferred Start Time

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.

Add Time

Time Sheet

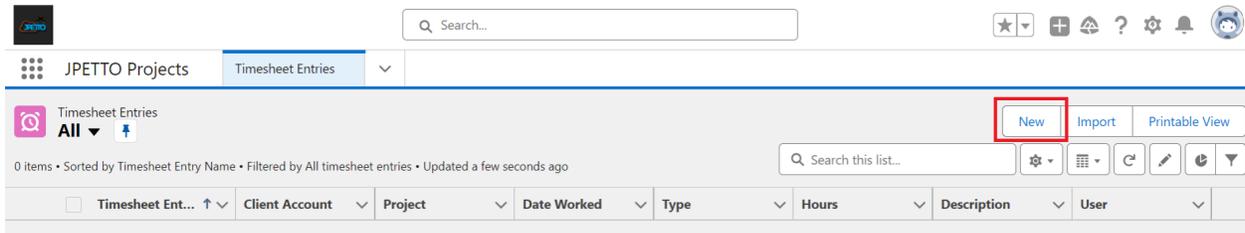
* Work Item

* Working Date * Hours Minutes Billable

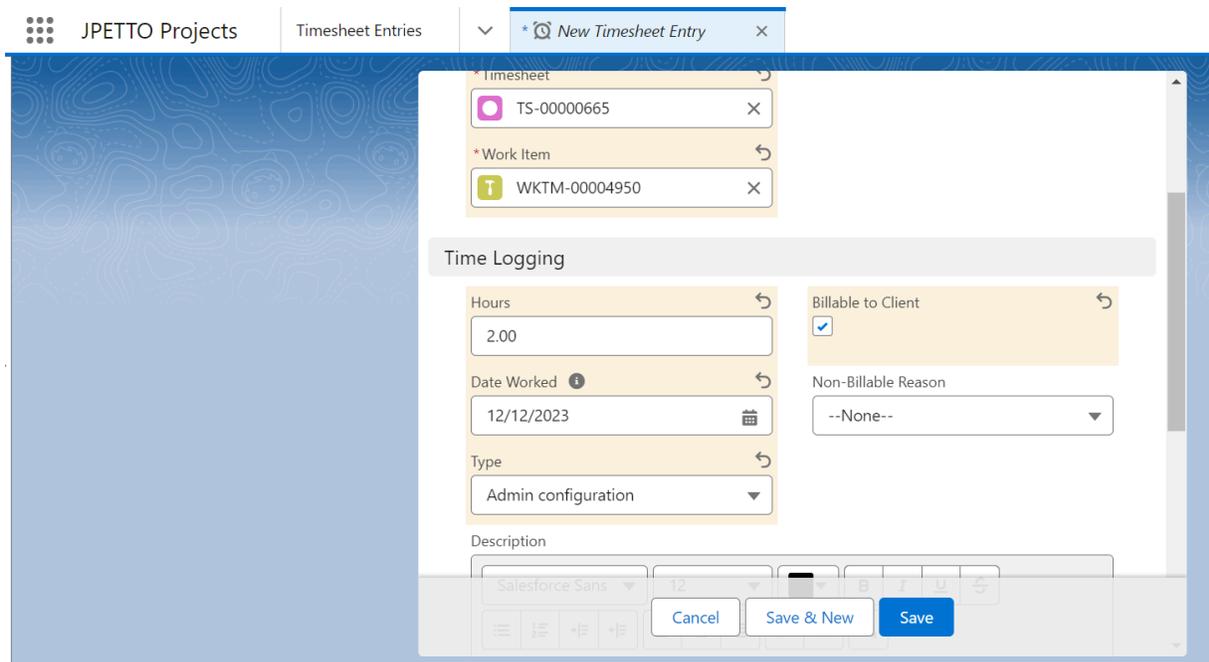
* Description

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.

The screenshot shows the JPETTO Projects interface. At the top, there are tabs for 'JPETTO Projects' and 'Work Items'. A dropdown menu shows 'WKTM-00004950 | W...'. Below this, a 'Work Item' card for 'Demo Account' is displayed. The card includes fields for Project (Demo Project), Assigned User (Kusuma Kumari), Work Item Type, Severity (3 - High), Priority (4), and Hours Remaining in (0.00). A progress bar below the card shows stages: New, Requirement..., Need Mor..., Ready for ..., Dev in Pr..., Dev Com..., QA Ready, QA In Pro..., and QA Failed. The 'New' button is highlighted in blue. Below the progress bar, there are tabs for 'Details', 'Files', 'Related', and 'Chat'. The 'Related' tab is active, showing 'Related Work Items (0)' and a 'New' button highlighted with a red box.

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

The screenshot shows the 'New Related Work Item' form. The form is titled 'New Related Work Item' and has an 'Information' section. It includes the following fields:

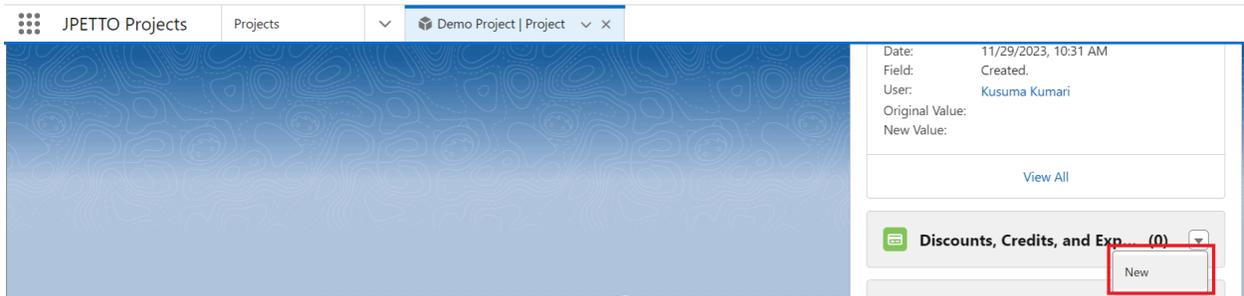
- Related Work Item Name:** A text input field.
- Secondary Work Item:** A search input field with the placeholder text 'Search Work Items...' and a search icon.
- Primary Work Item:** A dropdown menu showing 'WKTM-00004950' with a close button (X).
- Type:** A dropdown menu showing 'Sub-task' with a refresh icon (↺).

 At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

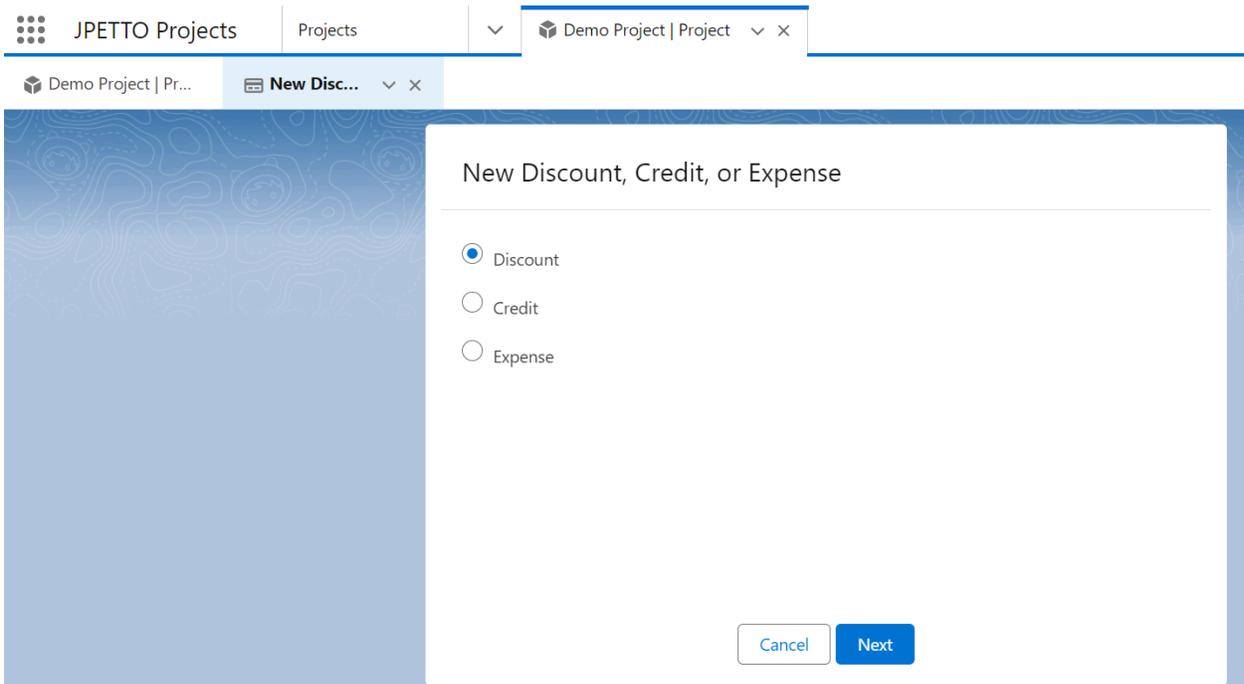
10. Creating a Discount, Credit, or Expense

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.



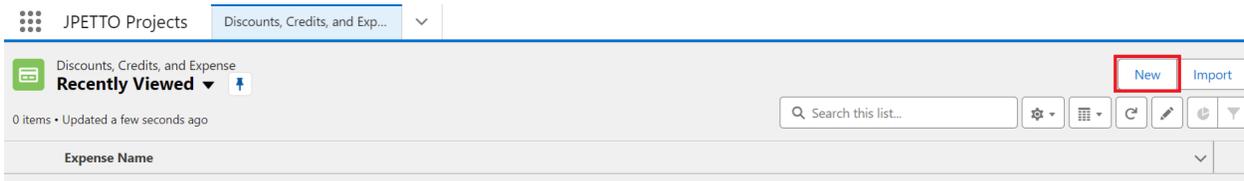
- Select the appropriate record type for the Discount, Credit, or Expense on the following screen.



- 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.

Pay Period
PP-0000000577

Related Details

Timesheets (1) New

Timesheet Name	User	Period	Hours Logged (Total)
TS-00000665	Kusuma Kumari	10/09/2023 - 10/15/2023	0.00

[View All](#)

Discounts, Credits, and Expense (0) New

- 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.

New Discount, Credit, or Expense: Discount

* = Required Information

Information

Expense Name Amount \$200.00

Title Discount 1 Pay Period PP-0000000577

*Project Demo Project

Cancel Save & New Save

Additional Features of Jpetto

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

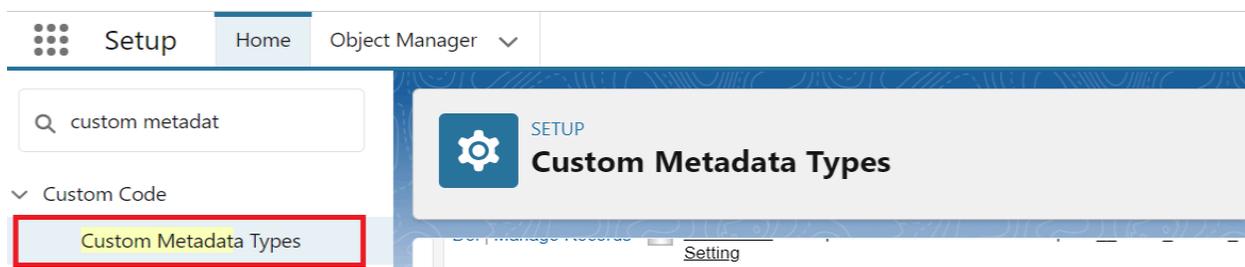
Below is the list of additional features available:

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.



SETUP

Custom Metadata Types

All Custom Metadata Types

[Help for this Page](#)

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

New Custom Metadata Type						
Action	Label	Namespace Prefix	Visibility	API Name	Record Size	Description
Del Manage Records	Batch Failure Notification Setting	Jpetto	Public	Jpetto__Batch_Failure_Notification_Setting__mdt	159	Used to determine who/if notifications are sent when a batch job fails to execute.
Del Manage Records	Enable JPetto Debug	Jpetto	Public	Jpetto__Enable_JPetto_Debug__mdt	151	When true, Jpetto classes will display debug data in Apex Logs.
	Non-Billable					This Metadata is used to store the Timeout

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

Custom Metadata Type

Batch Failure Notification Setting (Managed)

[Help for this Page](#)

This custom metadata type is managed. You can only edit certain attributes. [Display More Information](#)

[Standard Fields \[6\]](#) | [Custom Fields \[1\]](#) | [Validation Rules \[0\]](#) | [Page Layouts \[1\]](#)

Custom Metadata Type Detail

[Edit](#) [Manage Batch Failure Notification Settings](#)

Singular Label Batch Failure Notification Setting

Description Used to determine who/if notifications are sent when a batch job fails to execute.

Plural Label Batch Failure Notification Settings

Visibility Public

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

Batch Failure Notification Setting (Managed)

[Help for this Page](#)

This Batch Failure Notification Setting is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Batch Failure Notification Setting Detail

[Edit](#) [Clone](#)

Label Default

Protected Component

Batch Failure Notification Setting Name Default

Namespace Prefix Jpetto

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.

Batch Failure Notification Setting (Managed)

[Help for this Page](#)

This Batch Failure Notification Setting is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Batch Failure Notification Setting Edit Save Save & New Cancel

Information = Required Information

Label	<input type="text" value="Default"/>	Protected Component	<input type="checkbox"/>
Batch Failure Notification Setting Name	<input type="text" value="Default"/>	Namespace Prefix	Jpetto
Notification Recipient User Id	<input type="text"/>		

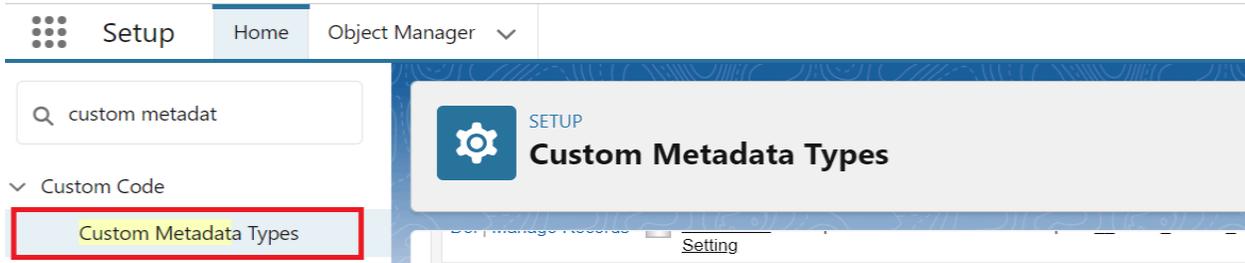
Save Save & New Cancel

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.

All Custom Metadata Types

[Help for this Page](#)

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

New Custom Metadata Type

Action	Label	Namespace Prefix	Visibility	API Name	Record Size	Description
Del Manage Records	<input checked="" type="checkbox"/> Batch Failure Notification Setting	Jpetto	Public	Jpetto__Batch_Failure_Notification_Setting__mdt	159	Used to determine who/if notifications are sent when a batch job fails to execute.
Del Manage Records	<input checked="" type="checkbox"/> Enable JPetto Debug	Jpetto	Public	Jpetto__Enable_JPetto_Debug__mdt	151	When true, Jpetto classes will display debug data in Apex Logs.

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

Enable JPetto Debug (Managed)

This custom metadata type is managed. You can only edit certain attributes. [Display More Information](#)

Standard Fields [6] | Custom Fields [1] | Validation Rules [0] | Page Layouts [1]

Custom Metadata Type Detail

Edit

Manage Enable JPetto Debug

Singular Label	Enable JPetto Debug	Description	When true, Jpetto classes will display debug data in Apex Logs.
Plural Label	Enable JPetto Debug	Visibility	Public
Object Name	Enable_JPetto_Debug	Protection Level	

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

Enable JPetto Debug (Managed)

This Enable JPetto Debug is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Enable JPetto Debug Detail

Edit

Clone

Label	DebugStatus	Protected Component	<input type="checkbox"/>
Enable JPetto Debug Name	DebugStatus	Namespace Prefix	Jpetto
Active	<input checked="" type="checkbox"/>		
Created By	Chad_Hammond, 6/8/2023, 7:39 AM	Last Modified By	Chad_Hammond, 6/8/2023, 7:39 AM

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

Enable JPetto Debug (Managed)

This Enable JPetto Debug is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Enable JPetto Debug Edit Save Save & New Cancel

Information ! = Required Information

Label	<input type="text" value="DebugStatus"/>	Protected Component	<input type="checkbox"/> ?
Enable JPetto Debug Name	<input type="text" value="DebugStatus"/> ?	Namespace Prefix	Jpetto
Active	<input checked="" type="checkbox"/>		

Save Save & New Cancel

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.

Setup Home Object Manager

custom metadat

Custom Code

Custom Metadata Types

SETUP Custom Metadata Types

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

SETUP Custom Metadata Types

Del	Manage Records	Batch Failure Notification Setting	Jpetto	Public	Jpetto__Batch_Failure_Notification_Setting__mdt	159	Used to determine who/if notifications are sent when a batch job fails to execute.
		Enable JPetto Debug	Jpetto	Public	Jpetto__Enable_JPetto_Debug__mdt	151	When true, Jpetto classes will display debug data in Apex Logs.
		Non-Billable Timesheet Entry	Jpetto	Public	Jpetto__Non_Billable_Timesheet_Entry__mdt	151	This Metadata is used to store the Timesheet entry Type that needs to be Non-Billable

This value will be used to set the status of all

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

SETUP Custom Metadata Types

Standard Fields [6] | Custom Fields [1] | Validation Rules [0] | Page Layouts [1]

Custom Metadata Type Detail

Edit Manage Non-Billable Timesheet Entries

Singular Label	Non-Billable Timesheet Entry	Description	This Metadata is used to store the Timesheet entry Type that needs to be Non-Billable
Plural Label	Non-Billable Timesheet Entries	Visibility	Public
Object Name	Non_Billable_Timesheet_Entry	Protection Level	

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

Non-Billable Timesheet Entries

View: All Create New View

New

Action	Label	Non-Billable Timesheet Entry Name	Namespace Prefix
Edit	Bereavement Leave	Bereavement_Leave	Jpetto
Edit	Floating Holiday	Floating_Holiday	Jpetto

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.

Non-Billable Timesheet Entry

[Help for this Page](#)

Non-Billable Timesheet Entry Edit Save Save & New Cancel

Information = Required Information

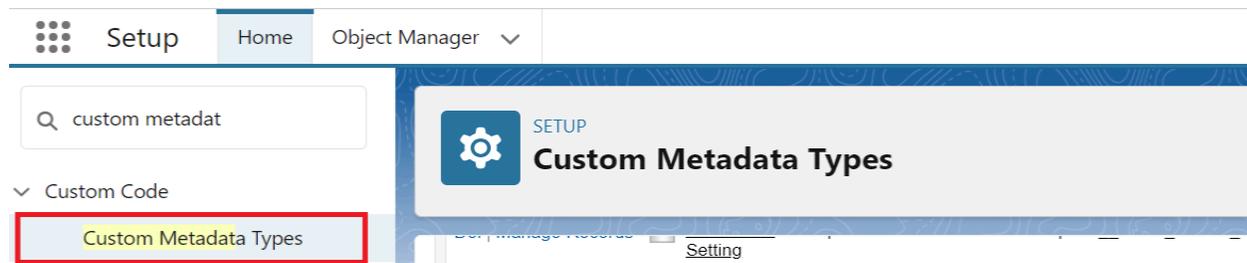
Label	<input type="text" value="Test Leave"/>	Protected Component	<input type="checkbox"/>
Non-Billable Timesheet Entry Name	<input type="text" value="Test_Leave"/>		
Timesheet Entry Type	<input type="text" value="Holiday"/>		

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.

The screenshot shows the 'Custom Metadata Types' list in the Salesforce Setup interface. The list contains several rows, each representing a custom metadata type. The row for 'Trigger Settings' is highlighted with a red box. The table columns include: Action (Del | Manage Records), Status (checked), Name, Object, Visibility, Key, Length, and Description.

Action	Status	Name	Object	Visibility	Key	Length	Description
Del Manage Records	<input checked="" type="checkbox"/>	Pay Period Expiration Status	Jpetto	Public	Jpetto__Pay_Period_Expiration_Status__mdt	151	This value 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 Periods Timesheet.
Del Manage Records	<input checked="" type="checkbox"/>	Pay Period Range	Jpetto	Public	Jpetto__Pay_Period_Range__mdt	154	The length of time that occurs within each Pay Period. *ONLY ONE ENTRY SHOULD EXIST AT ANY GIVEN TIME.
Del Manage Records	<input checked="" type="checkbox"/>	Pay Period Setting	Jpetto	Public	Jpetto__Pay_Period_Setting__mdt	161	
Del Manage Records	<input checked="" type="checkbox"/>	Timesheet Approval Status	Jpetto	Public	Jpetto__Timesheet_Approval_Statuses__mdt	151	Entries into this Metadata type 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.
Del Manage Records	<input checked="" type="checkbox"/>	Timesheet Setting	Jpetto	Public	Jpetto__Timesheet_Setting__mdt	416	
Del Manage Records	<input checked="" type="checkbox"/>	Trigger Setting	Jpetto	Public	Jpetto__Trigger_Setting__mdt	221	

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

SETUP
Custom Metadata Types

Custom Metadata Type Detail Edit **Manage Trigger Settings**

Singular Label	Trigger Setting	Description	
Plural Label	Trigger Settings	Visibility	Public
Object Name	Trigger_Setting	Protection Level	

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.

Trigger Setting Edit Save Save & New Cancel

Information ! = Required Information

Label	<input type="text" value="TimesheetTrigger"/>	Protected Component	<input type="checkbox"/> ⓘ
Trigger Setting Name	<input type="text" value="TimesheetTrigger"/> ⓘ	Namespace Prefix	Jpetto

BeforeInsert	<input checked="" type="checkbox"/>
BeforeUpdate	<input checked="" type="checkbox"/>
BeforeDelete	<input type="checkbox"/>
AfterInsert	<input checked="" type="checkbox"/>
AfterUpdate	<input checked="" type="checkbox"/>
AfterDelete	<input type="checkbox"/>
AfterUndelete	<input type="checkbox"/>
BeforeUndelete	<input type="checkbox"/>

Save Save & New Cancel

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.

Setup Home Object Manager

Q custom sett

Custom Code

Custom Settings

Didn't find what you're looking for?
Try using Global Search.

Custom Settings

Use custom settings to create and manage custom data at the organization can access it efficiently, without the cost of repeated queries. Custom settir

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

SETUP Custom Settings

Edit Del Manage	Leave Approval Request	Public	Hierarchy	Jpetto	This Custom setting is used to Enable Approval Requests for Vacation Leave and Bereavement Leave Before X Number of Days	128	0	0
Edit Del Manage	<u>Org Id To Project</u>	Public	List	Jpetto		180	3	540
Edit Del Manage	Slack Channel Name	Public	List	Jpetto	Stores info for creating a channel in Slack for the object record, and automation will choose the channel name with the information provided in this Custom Settings.	620	2	1240
Edit Del Manage	Slack Integration Active	Public	Hierarchy	Jpetto	If there is a Slack Integration in your Org Check the Active Checkbox.	130	1	130
Edit Del Manage	Slack Webhook	Public	List	Jpetto	A Record will be created if the Slack webhook is Authenticated. The Record is Created By the Automation. If You are Creating the New Slack Webhook URL. Delete the record This in these Custom Settings.	110	1	110
Edit Del Manage	Vacation Days	Public	Hierarchy	Jpetto	This Custom settings is used to give Vacation Days Based on the Employees tenure	136	0	0

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

Custom Setting Definition [Help for this Page](#)

Vacation Days

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail

Edit Delete **Manage**

Label	Vacation Days	Object Name	VacationDays
API Name	Jpetto__VacationDays__c	Setting Type	Hierarchy

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

Vacation Days

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

New

Setup Owner ↑	Location
No records to display.	

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.

Vacation Days Edit

Provide values for the fields you created. This data is cached with the application.

Edit Vacation Days Save Cancel

Vacation Days Information ! = Required Information

Location Profile 🔍

No of Vacation Days 2

Tenure 1

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.

Setup Home Object Manager

Q custom sett

Custom Code

Custom Settings

Didn't find what you're looking for?
Try using Global Search.

Custom Settings

Use custom settings to create and manage custom data at the organization can access it efficiently, without the cost of repeated queries. Custom settir

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

SETUP Custom Settings

Edit Del Manage	Leave Approval Request	Public	Hierarchy	Jpetto	This Custom setting is used to Enable Approval Requests for Vacation Leave and Bereavement Leave Before X Number of Days	128	0	0
Edit Del Manage	Org Id To Project	Public	List	Jpetto		180	3	540
Edit Del Manage	Slack Channel Name	Public	List	Jpetto	Stores info for creating a channel in Slack for the object record, and automation will choose the channel name with the information provided in this Custom Settings.	620	2	1240
Edit Del Manage	Slack Integration Active	Public	Hierarchy	Jpetto	If there is a Slack Integration in your Org Check the Active Checkbox.	130	1	130
Edit Del Manage	Slack Webhook	Public	List	Jpetto	A Record will be created if the Slack webhook is Authenticated. The Record is Created By the Automation. If You are Creating the New Slack Webhook URL. Delete the record This in these Custom Settings.	110	1	110
Edit Del Manage	Vacation Days	Public	Hierarchy	Jpetto	This Custom settings is used to give Vacation Days Based on the Employees tenure	136	0	0
Edit Del Manage	VacationHourSettings	Public	Hierarchy	Jpetto	This Custom setting is used allow Enable Users to Log Vacation Hours More than allocated vacation Hours.	128	1	128

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

Custom Setting Definition [Help for this Page](#)

VacationHourSettings

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail Edit Delete **Manage**

Label	VacationHourSettings	Object Name	VacationHourSettings
API Name	Jpetto__VacationHourSettings__c	Setting Type	Hierarchy

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

VacationHourSettings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.



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.

VacationHourSettings Edit

Provide values for the fields you created. This data is cached with the application.

A screenshot of the 'Edit VacationHourSettings' form. The form has a title bar with 'Edit VacationHourSettings' and 'Save' and 'Cancel' buttons. Below the title bar is a section titled 'VacationHourSettings Information' with a legend 'I = Required Information'. The form contains the following fields:

- Location: Jpnetto Packaging_Org
- Enable Negation Vacation Hours:
- Number of Vacation Hours:

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.

Setup Home Object Manager

Q custom sett

Custom Code

Custom Settings

Didn't find what you're looking for?
Try using Global Search.

SETUP Custom Settings

Custom Settings

Use custom settings to create and manage custom data at the organization can access it efficiently, without the cost of repeated queries. Custom settir

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

SETUP Custom Settings

Edit Del Manage	Connect Users	Public	Hierarchy	Jpetto	Put the SlackBot Token in the Instance Record fields which You will get when these values from respective Jpetto Connect Integrations.	377 3	1131
Edit Del Manage	Leave Approval Request	Public	Hierarchy	Jpetto	This Custom setting is used to Enable Approval Requests for Vacation Leave and Bereavement Leave Before X Number of Days	128 0	0

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

Custom Setting Definition [Help for this Page](#)

Leave Approval Request

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail [Edit](#) [Delete](#) [Manage](#)

Label	Leave Approval Request	Object Name	Leave_Approval_Request
API Name	Jpetto__Leave_Approval_Request__c	Setting Type	Hierarchy

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

Custom Setting [Help for this Page](#)

Leave Approval Request

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

[New](#)

▼ Default Organization Level Value

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.

Leave Approval Request Edit

[Help for this Page](#) ?

Provide values for the fields you created. This data is cached with the application.

Edit Leave Approval Request Save Cancel

Leave Approval Request Information ! = Required Information

Location

Enable Approval Process

No of days Before

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:

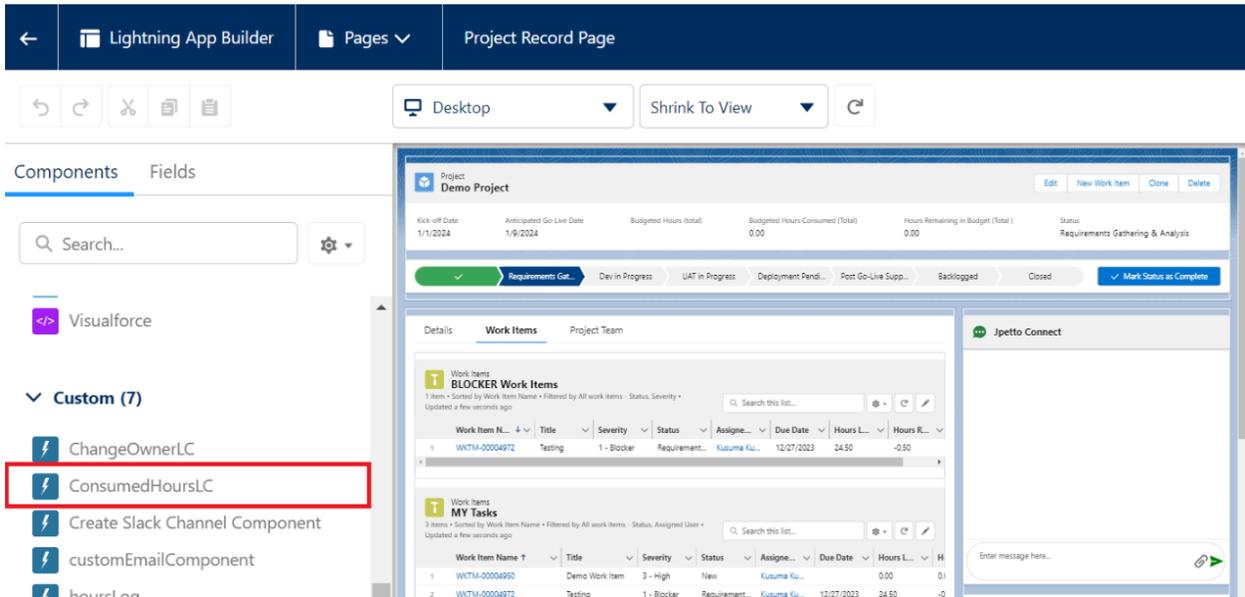
Step 1: Go to the record page of the object (Account or Project or Work Item) where you want to use the **Consumed Hours Component** and check whether the Consumed Hours Component is available on the page or not.

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

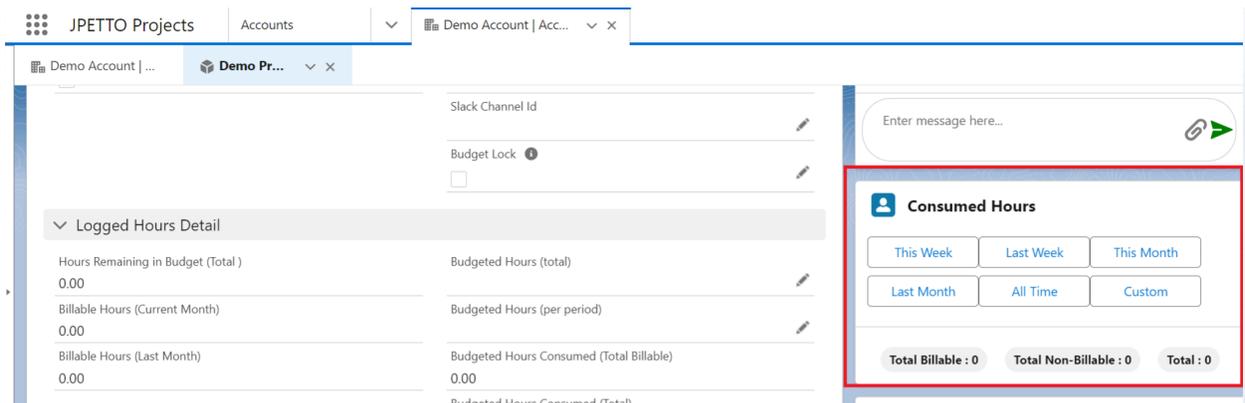
Step 3: Click on the **Gear** icon of the page and then click on the **Edit Page** option.

The screenshot shows a software interface for a project record. At the top, there is a search bar and navigation icons. Below that, the breadcrumb trail reads 'JPETTO Projects > Projects > Demo Project | Project'. The main content area displays project details for 'Demo Project', including 'Kick-off Date' (1/1/2024), 'Anticipated Go-Live Date' (1/9/2024), 'Budgeted Hours (total)', 'Budgeted Hours Consumed (Total)' (0.00), and 'Hours Remaining in Budget (Total)' (0.00). A progress bar below these details shows stages: Requirements (checked), Dev in Progress, UAT in Progress, Deployment P..., Post Go-Live S..., Backlogged, and Closed. A gear icon in the top right corner is open, showing a menu with options: Setup, Service Setup, Developer Console, Edit Page (highlighted with a red box), and Edit Object. At the bottom, there are tabs for 'Details', 'Work Items', and 'Project Team', and a 'Consumed Hours' section with filters for 'This Week', 'Last Week', and 'This Month'.

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.

The screenshot shows a web application interface. At the top, there are tabs for 'JPETTO Projects', 'Accounts', and 'Demo Account | Acc...'. Below this, there are more tabs for 'Demo Account | ...', 'Demo Pro...', and 'WKTm-0...'. The main content area displays a 'Work Item' titled 'Demo Account'. To the right of the title are buttons for 'Log Hours', 'Assign', 'Edit', and 'Clone'. The 'Assign' button is highlighted with a red box. Below the title, there is a table with the following data:

Project	Assigned User	Work Item Type	Severity	Priority	Hours Remaining in Work Item Budget
Demo Project	Kusuma Kumari		3 - High	4	0.00

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

The screenshot shows a pop-up window titled 'Assign to Team Member'. It displays the text 'Currently Assigned To: None'. Below this is a table with the following structure:

NAME	ROLE	AVAILABILITY	ACTION
			

At the bottom right of the pop-up, there are 'Cancel' and 'Save' buttons.

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



Add new Team Member

*Select User

Kusuma Kumari

*Select Role

Administrator

Save

- 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.

Assign to Team Member

Currently Assigned To:  **None**

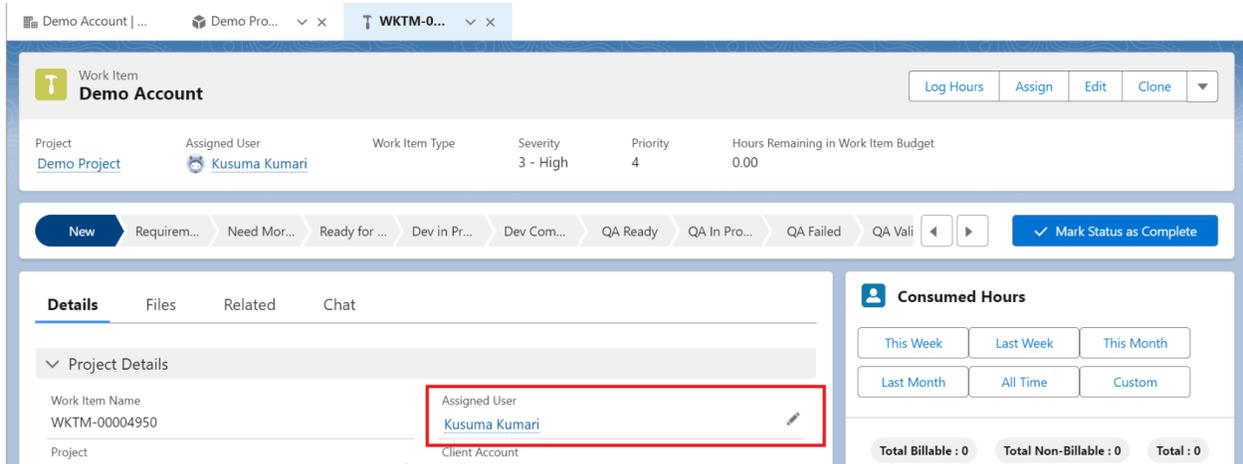
NAME	ROLE	AVAILABILITY	ACTION
Kusuma Kumari	Administrator	40	<input checked="" type="radio"/>



Cancel

Save

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



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

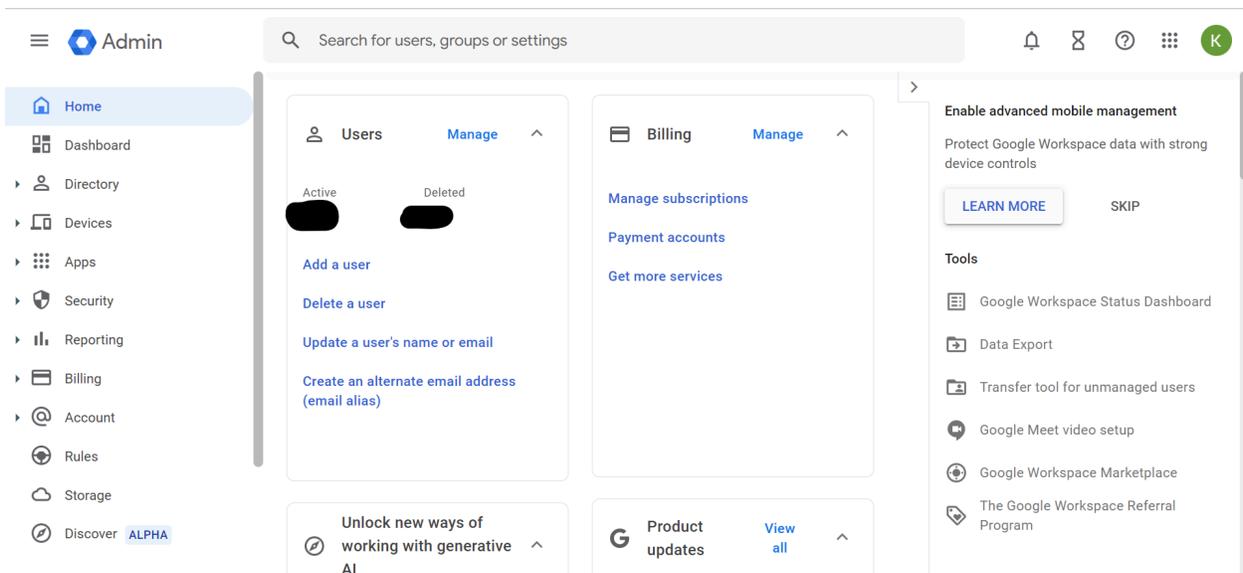
Pre-requisites:

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.

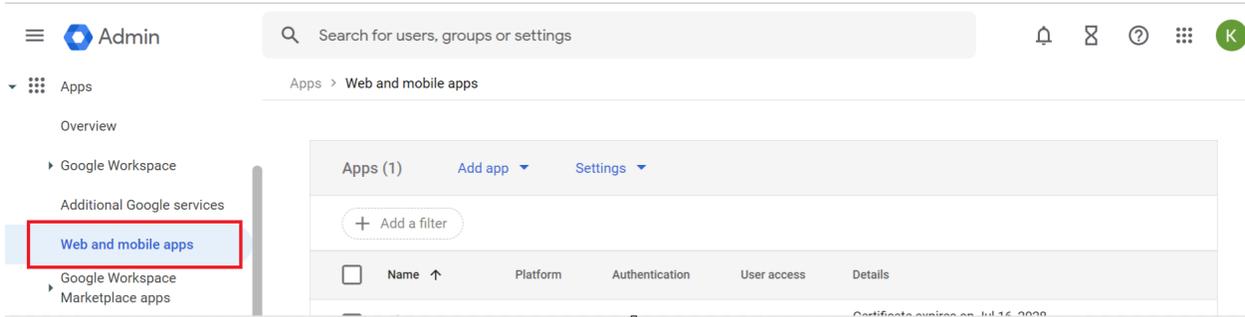
Instructions:

Within Google/GSuite Admin Console

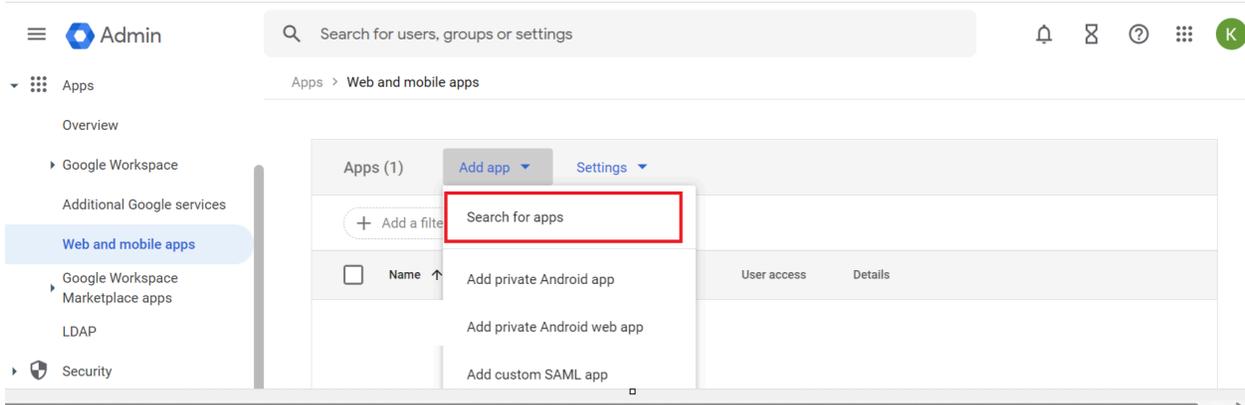
Step 1: Go to your GSuite Admin Console and login: <https://admin.google.com/>



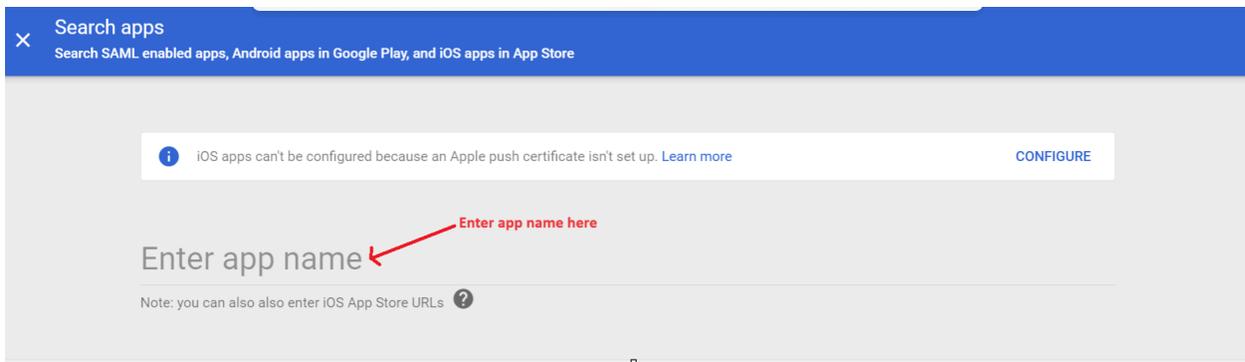
Step 2: Go to APPS and click “Web and mobile apps” .



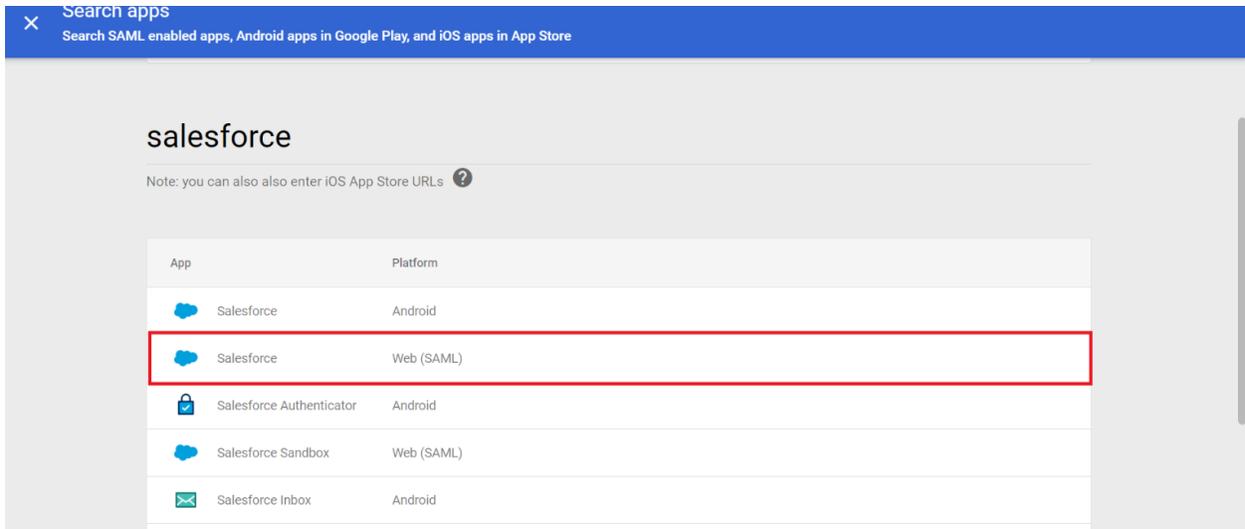
Step 3: Select **Search for apps** under the “Add App” drop-down.



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.

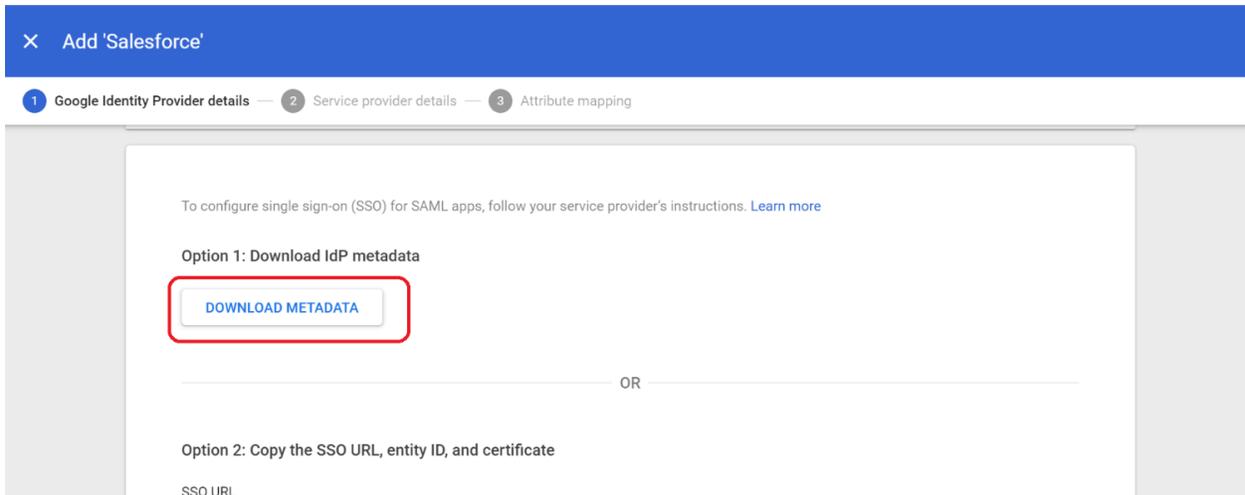


Step 6: click on the **Select** button of the app.

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



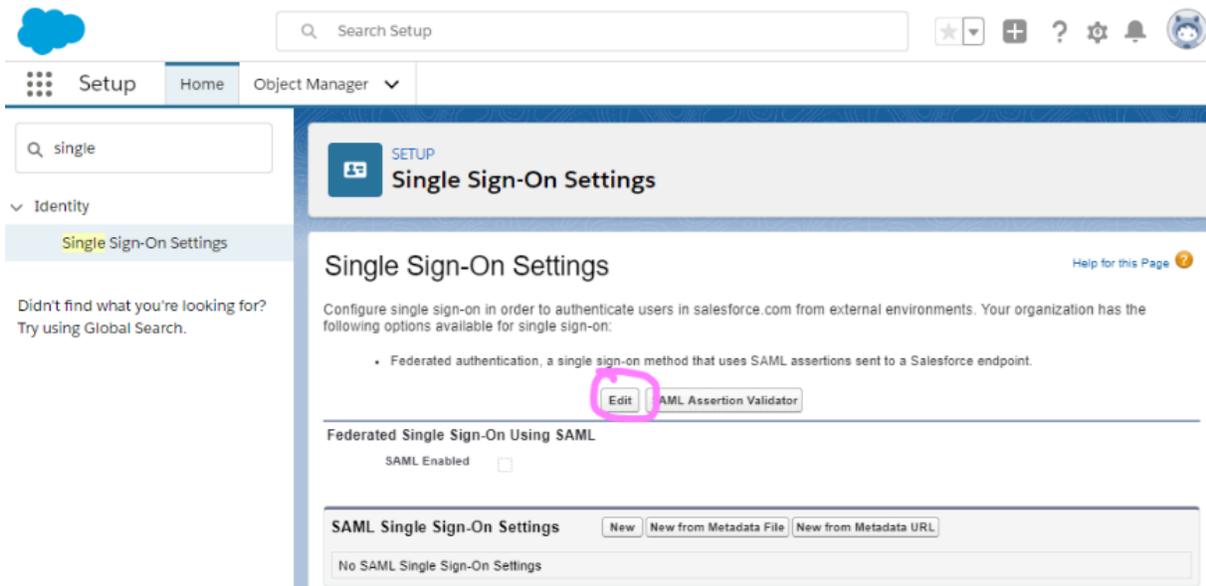
Step 7: On the following screen, download IDP metadata using the “1st option” (see red highlight on screenshot below).



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**.

SETUP

Single Sign-On Settings

Single Sign-On Settings

Help for this Page ?

Configure single sign-on in order to authenticate users in salesforce.com from external environments. Your organization has the following options available for single sign-on:

- Delegated authentication is a single sign-on method that uses a Web service call sent from salesforce.com to an endpoint.
- Federated authentication, a single sign-on method that uses SAML assertions sent to a Salesforce endpoint.

Edit SAML Assertion Validator

Federated Single Sign-On Using SAML

SAML Enabled

Make Federation ID case-insensitive

SAML Single Sign-On Settings

New New from Metadata File New from Metadata URL

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

SETUP

Single Sign-On Settings

Single Sign-On Settings

Help for this Page ?

Save **Cancel**

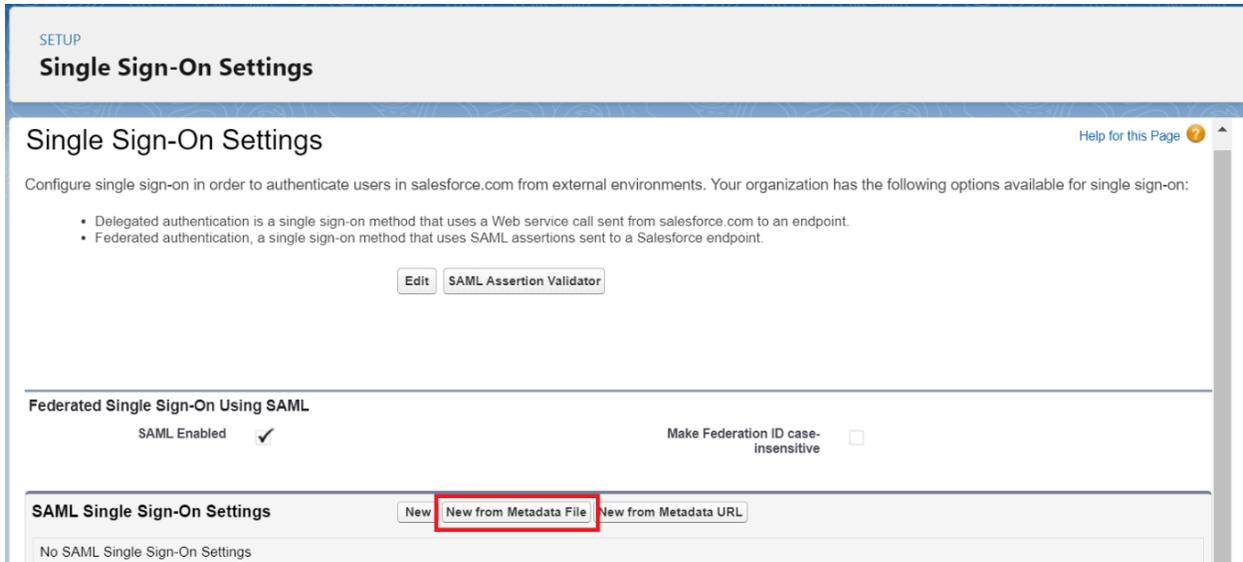
Federated Single Sign-On Using SAML

SAML Enabled

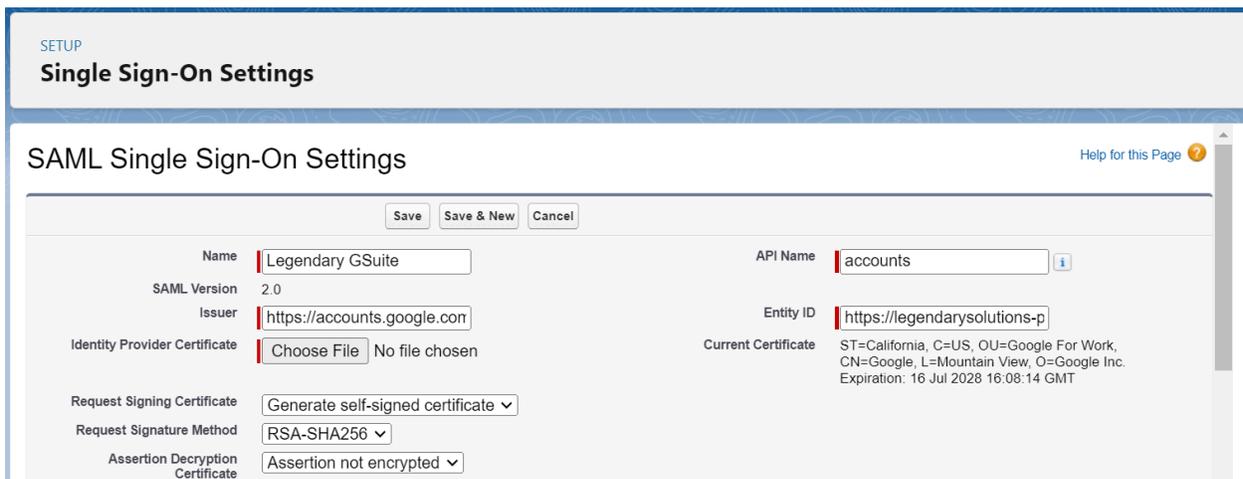
Make Federation ID case-insensitive ?

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.

SETUP
Single Sign-On Settings

SAML Single Sign-On Settings help for this Page

Back to Single Sign-On Settings

Edit Delete Clone Download Metadata SAML Assertion Validator

Name	Legendary GSuite	API Name	Legendary_GSuite
SAML Version	2.0	Entity ID	https://legendarysolution.com
Issuer	https://accounts.google.com/o/saml2/		
Identity Provider Certificate	ST=California, C=US, OU=Google For Work, CN=Google, L=Mountain View, O=Google Inc. Expiration: 16 Jul 2026 16:08:14 GMT		
Request Signing Certificate	SamlSignCert_19Jan2024_122955		
Request Signature Method	RSA_SHA256		
Assertion Encryption Certificate	Assertion not encrypted		
SAML Identity Type	Username		
SAML Identity Location	Subject		
Service Provider Initiated Request Binding	HTTP Redirect		
Identity Provider Login URL	https://accounts.google.com/o/saml2/idp/		
Custom Logout URL			
Custom Error URL			
Use Salesforce MFA for this SSO Provider	<input type="checkbox"/>		
Single Logout Enabled	<input type="checkbox"/>		

Just-in-time User Provisioning

User Provisioning Enabled

Endpoints

View SAML endpoints for your org, Experience Cloud sites, or custom domains.

Your Organization

Login URL	https://legendarysolutions-pbo.my.salesforce.com
Logout URL	https://legendarysolutions-pbo.my.salesforce.com/services/authorization/logout
OAuth 2.0 Token Endpoint	https://legendarysolutions-pbo.my.salesforce.com/services/oauth2/token

Within Google/GSuite Admin Console again

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

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

✕ Add 'Salesforce'

Google Identity Provider details —
 2 Service provider details —
 3 Attribute mapping

Service provider details

To configure single sign on, add service provider details such as ACS URL and entity ID. [Learn more](#)

ACS URL

https://(domain specific).my.salesforce.com

Invalid format for ACS URL

Entity ID

https://(domain specific).my.salesforce.com

Start URL (optional)

https://(domain specific).my.salesforce.com/

Signed response

BACK CANCEL CONTINUE

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):

× Add 'Salesforce'

✓ Google Identity Provider details — 2 Service provider details — 3 Attribute mapping

Service provider details

To configure single sign on, add service provider details such as ACS URL and entity ID. [Learn more](#)

ACS URL
https://legendarysolutions-██████████.com

Entity ID
https://legendarysolutions-██████████.com

Start URL (optional)
https://legendarysolutions-██████████.com

Signed response

BACK CANCEL **CONTINUE**

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:

Search for users, groups or settings

Apps > Web and mobile apps > Salesforce

SAML

Salesforce

Salesforce Application

User access

To make the managed app available to select users, choose a group or organizational unit. [Learn more](#)

[View details](#)

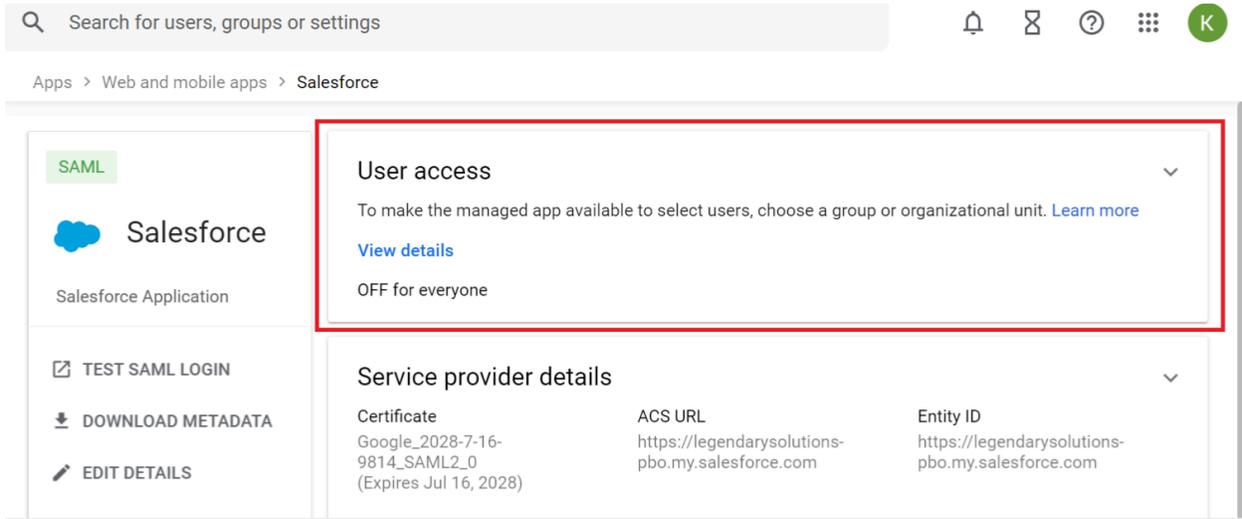
OFF for everyone

Service provider details

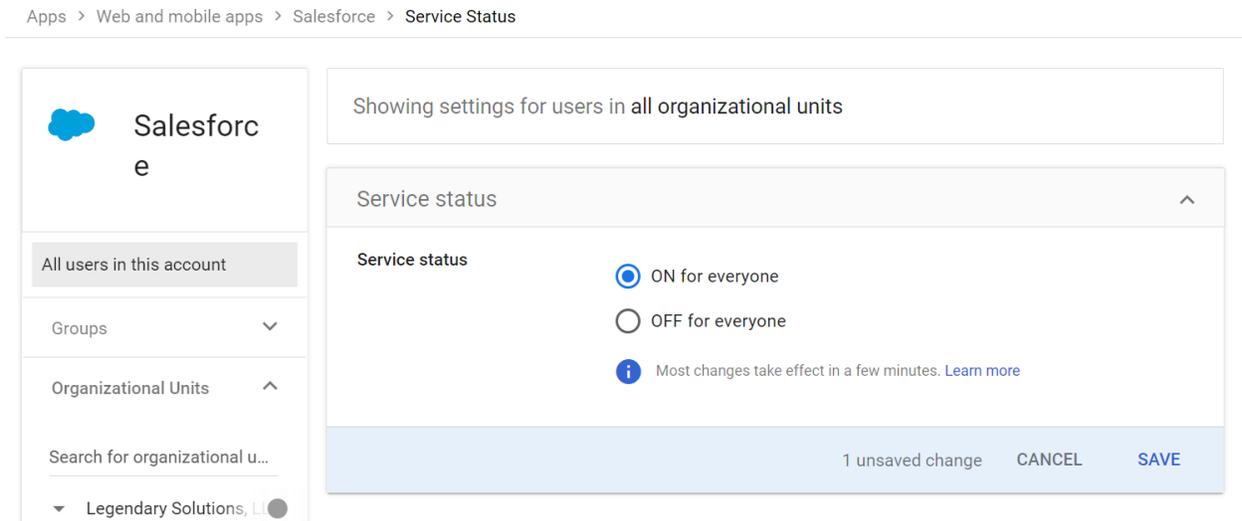
Certificate	ACS URL	Entity ID
Google_2028-7-16-9814_SAML2_0 (Expires Jul 16, 2028)	https://legendarysolutions-pbo.my.salesforce.com	https://legendarysolutions-pbo.my.salesforce.com

SAML attribute mapping

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



Step 25: Press Save.

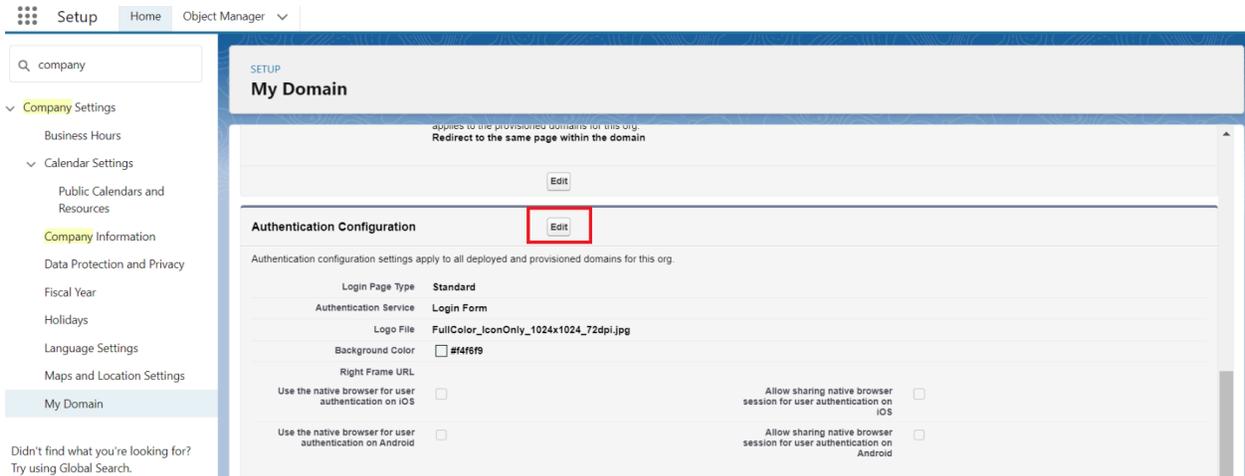


Step 26: This change **can take up to 24 hours**, even for small organizations. You still need to complete a few more steps (see below).

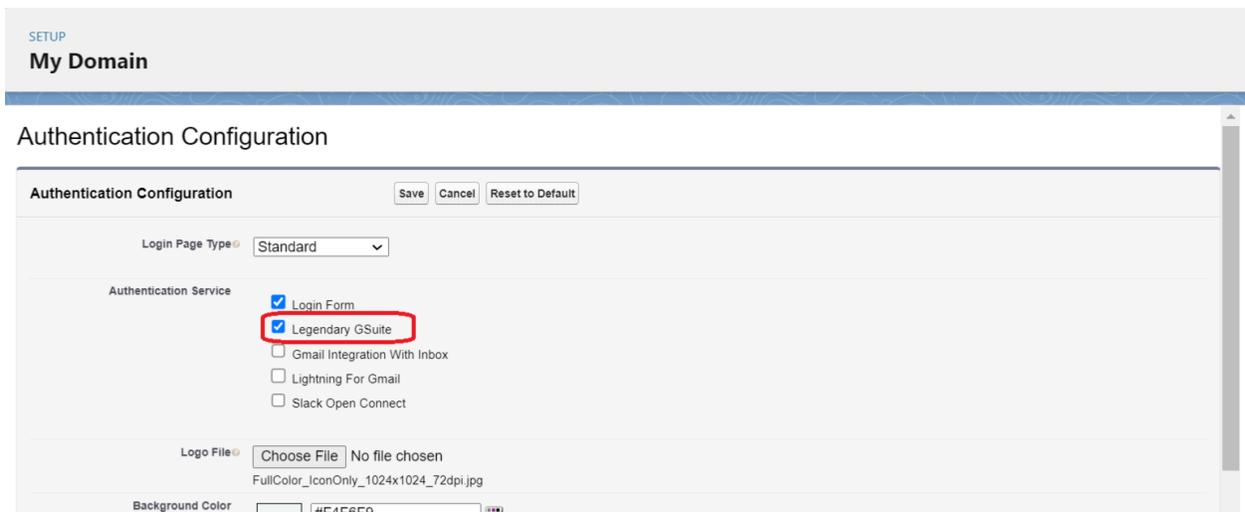
Back in Salesforce

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.

Setup Home Object Manager

Search: single

Identity

Single Sign-On Settings

Didn't find what you're looking for? Try using Global Search.

Single Sign-On Settings

Configure single sign-on in order to authenticate users in salesforce.com from external environments. Your organization has the following options available for single sign-on:

- Delegated authentication is a single sign-on method that uses a Web service call sent from salesforce.com to an endpoint.
- Federated authentication, a single sign-on method that uses SAML assertions sent to a Salesforce endpoint.

[Edit](#) [SAML Assertion Validator](#)

Delegated Authentication

Disable login with Salesforce credentials

Federated Single Sign-On Using SAML

SAML Enabled Make Federation ID case-insensitive

SAML Single Sign-On Settings [New](#) [New from Metadata File](#) [New from Metadata URL](#)

Action	Name	SAML Version	Issuer	Entity ID
Edit Del	Legendary_GSuite	2.0	https://accounts.google.com/o/saml2?i=[REDACTED]	https://legandarysolutions-[REDACTED]

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

Setup

Single Sign-On Settings

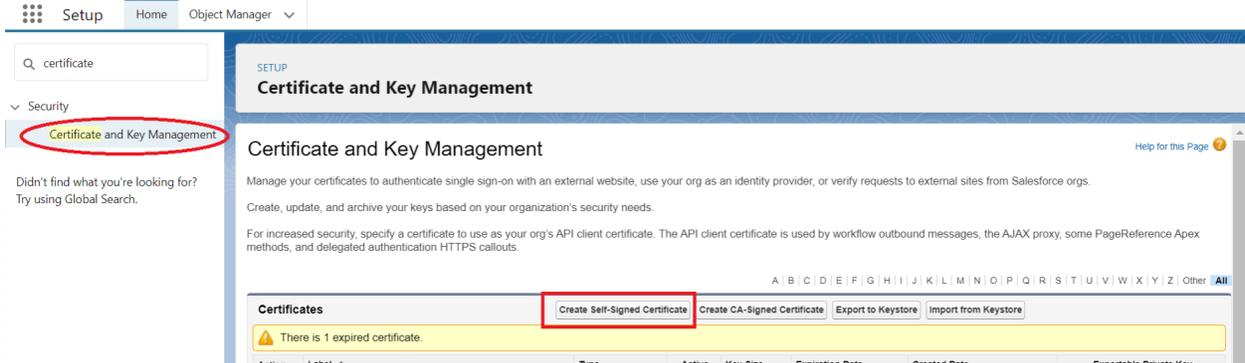
SAML Single Sign-On Settings

[Back to Single Sign-On Settings](#) [Help for this Page](#)

[Edit](#) [Delete](#) [Clone](#) [Download Metadata](#) [SAML Assertion Validator](#)

Name	Legendary GSuite	API Name	Legendary_GSuite
SAML Version	2.0	Issuer	https://accounts.google.com/o/saml2?i=[REDACTED]
Identity Provider Certificate	ST=California, C=US, OU=Google For Work, CN=Google, L=Mountain View, O=Google Inc. Expiration: 16 Jul 2028 16:08:14 GMT	Entity ID	https://legandarysolutions-[REDACTED]
Request Signing Certificate	SelfSignedCert_19Jan2 [REDACTED]		
Request Signature Method	RSA-SHA256		
Assertion Decryption Certificate	Assertion not encrypted		
SAML Identity Type	Username		
SAML Identity Location	Subject		
Service Provider Initiated Request Binding	HTTP Redirect		

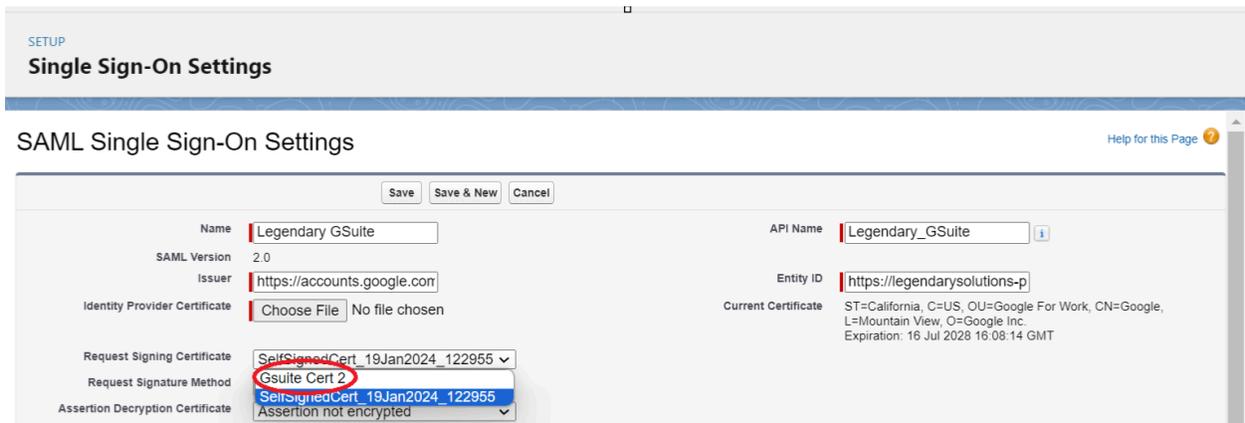
Step 3: Go to Certificate and Key Management (within Setup) and click “Create Self-Signed Certificate”.



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.



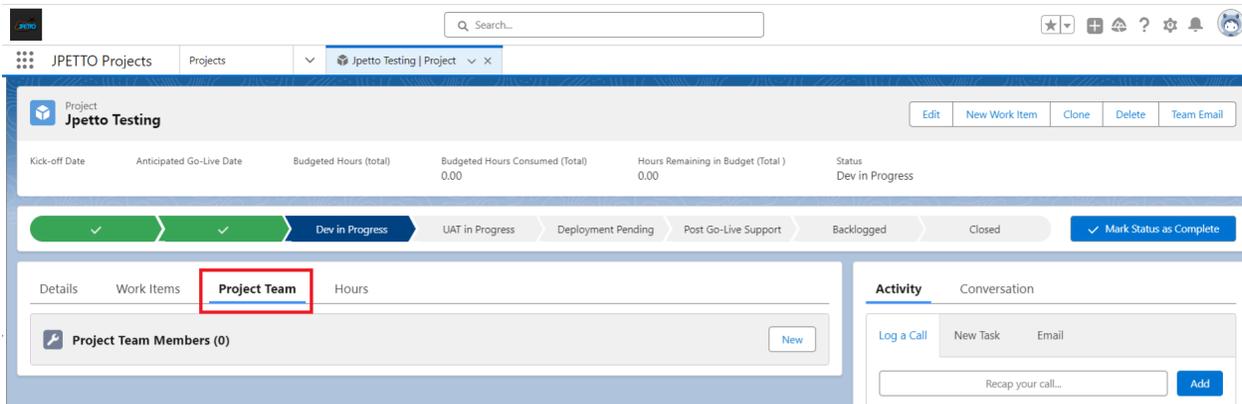
Step 6: Press “Save” and it's all done!

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).

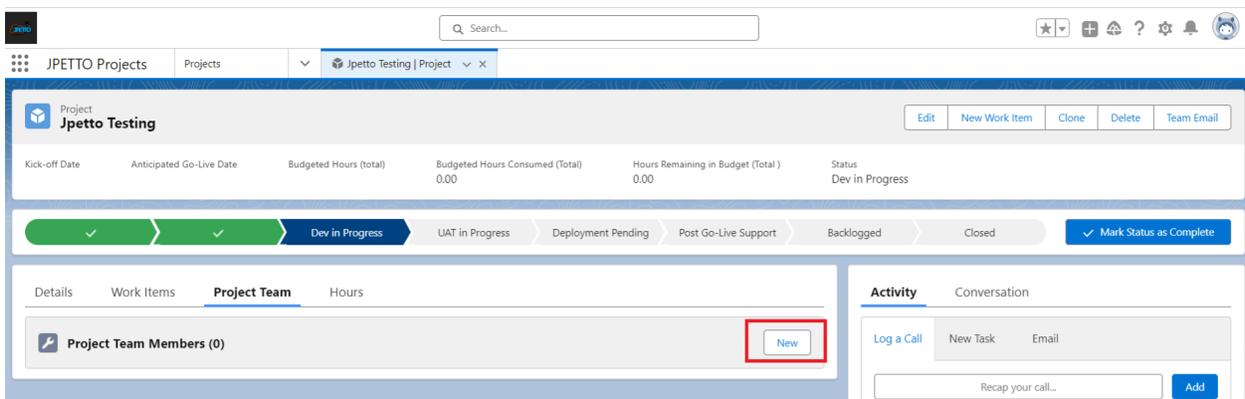
1. Share Access when creating PTM:

- 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.



The screenshot shows the Jpetto interface for a project named 'Jpetto Testing'. The 'Project Team' tab is highlighted with a red box. The page displays project details such as 'Kick-off Date', 'Anticipated Go-Live Date', 'Budgeted Hours (total)', 'Budgeted Hours Consumed (Total)', 'Hours Remaining in Budget (Total)', and 'Status' (Dev in Progress). A progress bar shows the current status as 'Dev in Progress'. Below the tabs, there is a section for 'Project Team Members (0)' with a 'New' button. The right sidebar shows an 'Activity' section with options for 'Log a Call', 'New Task', and 'Email'.

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



This screenshot is similar to the previous one, but the 'New' button in the 'Project Team Members (0)' section is highlighted with a red box. The rest of the page content, including the project details and progress bar, remains the same.

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

The screenshot shows a web application interface for adding a new project team member. The page title is "New Project Team Member". It contains two main sections: "Project Details" and "Team Member Details".

Project Details:

- Project Team Name: (Empty text input)
- External User:
- Project: (Dropdown menu showing "Jpetto Testing")

Team Member Details:

- Team Member: (Dropdown menu showing "Kusuma Kumari")
- Role: (Dropdown menu showing "Administrator")
- External Team Member: (Text input with "Search Contacts..." placeholder)
- Active:

At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save".

- 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.

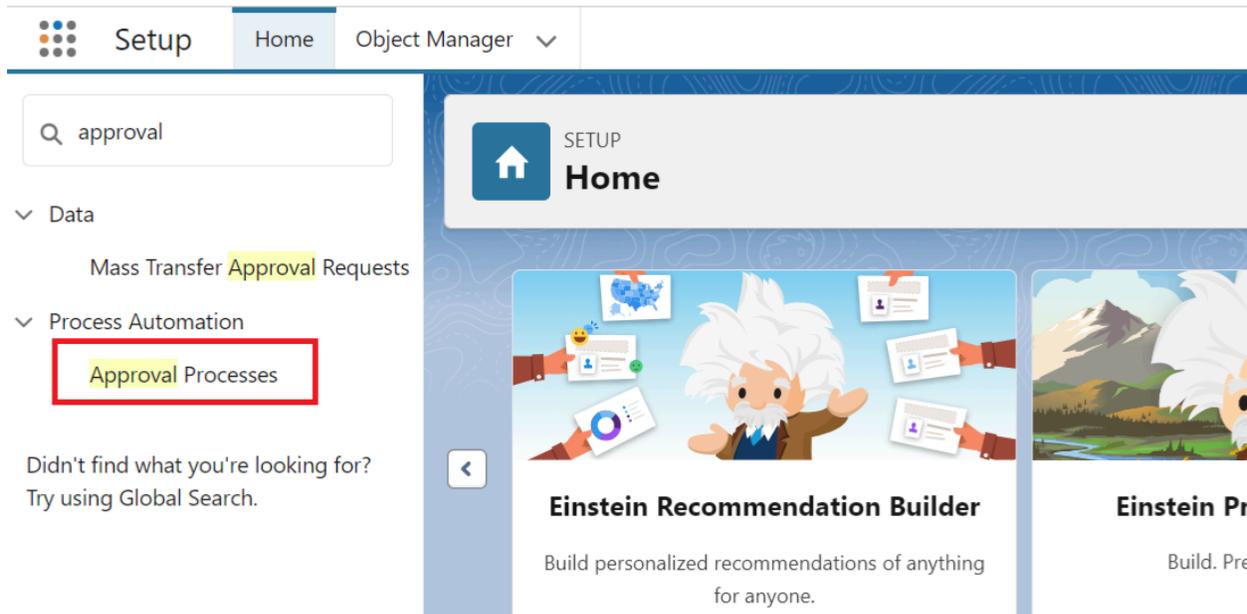
Approval Processes that need to be added in Jpetto are

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

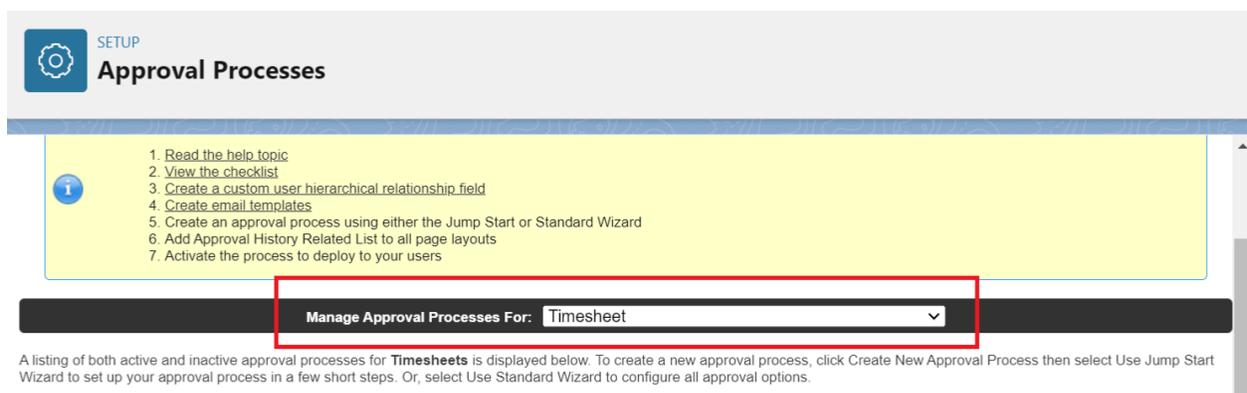
1. Timesheet Approval Process

- 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.



SETUP

Approval Processes

4. [Create email templates](#)
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: Timesheet

A listing of both active and inactive approval processes for **Timesheets** is displayed below. To create a new approval process, click Create New Approval Process then select Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

- Create New Approval Process
- Use Jump Start Wizard
- Use Standard Setup Wizard

Reorder

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.



SETUP

Approval Processes

Timesheets

Step 1. Enter Name and Description

Step 1 of 6

Next Cancel

Enter a name and description for your new approval process.

Enter Name and Description

! = Required Information

Process Name Timesheet Approval

Unique Name Timesheet_Approval

Description This is approval process for timesheets

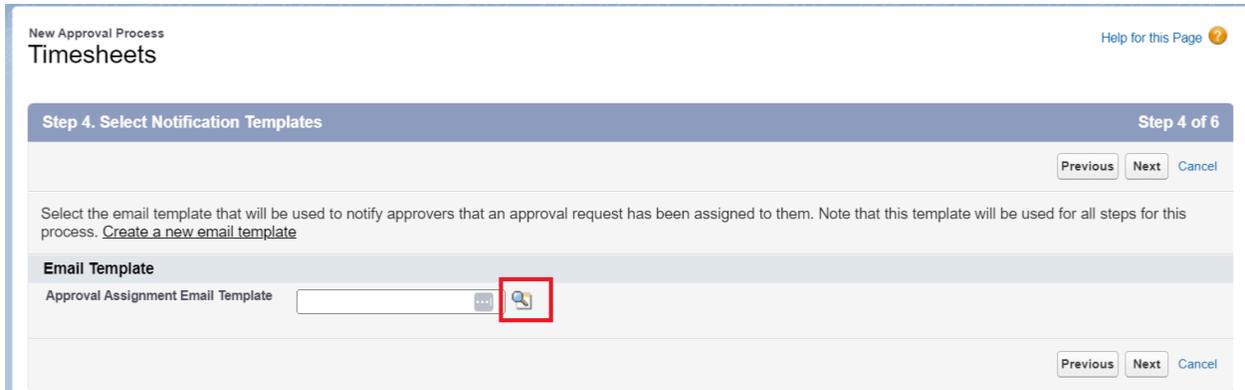
Next Cancel

Step 6: Click **Next**.

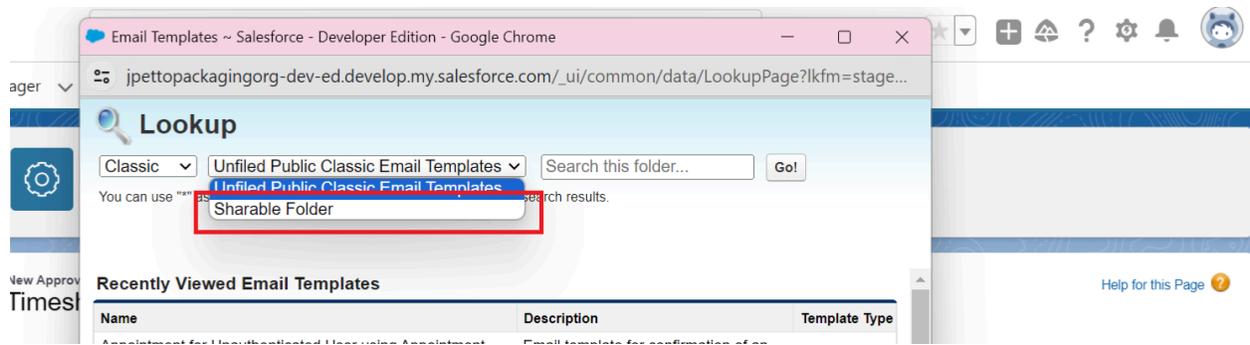
Step 7: Click **Next**.

Step 8: Click **Next**.

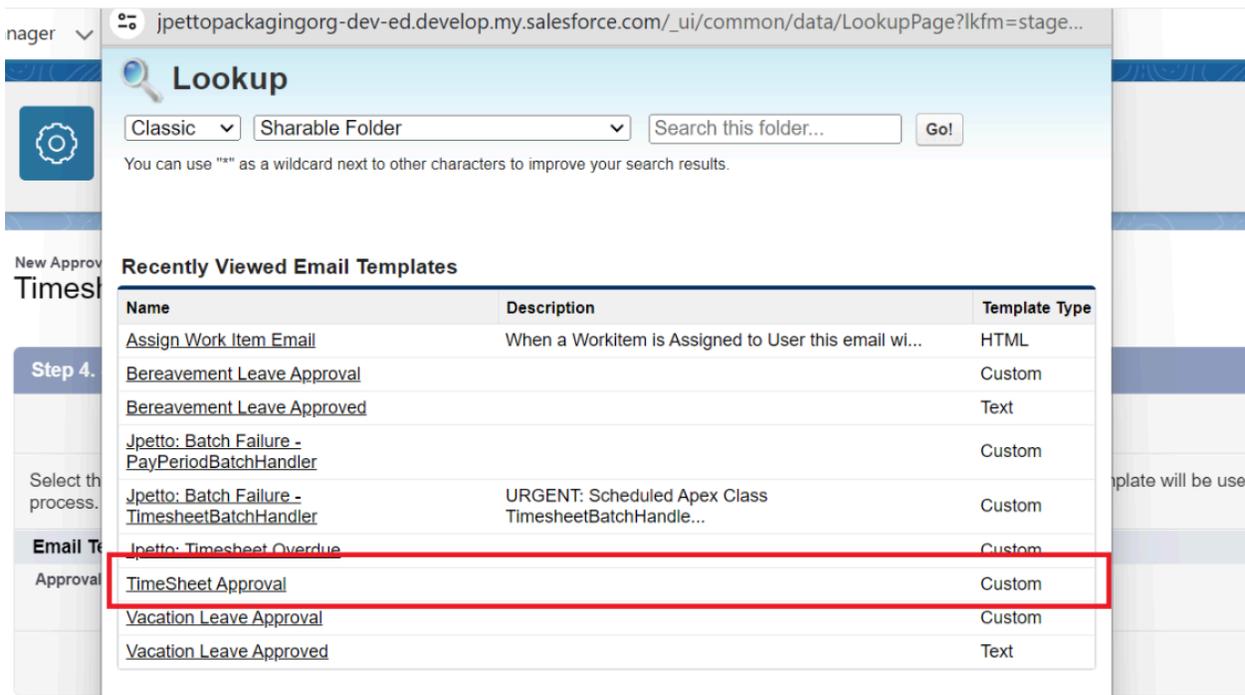
Step 9: Click on the **Look Up** icon of the **Approval Assignment Email Template** field.



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 5. Select Fields to Display on Approval Page Layout Step 5 of 6

[Previous](#) [Next](#) [Cancel](#)

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Available Fields	Selected Fields
Active	Timesheet Name
Created By	User
End Date	Pay Period
Last Modified By	Hours Logged (Billable)
Normalized Rate of Pay	Hours Logged (Total)
Period	Submission Comments
Previous Status	Owner
Start Date	
Status	
Total Cost	
User Id	

[Click here to view an example](#)

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**.

SETUP **Approval Processes**

What Would You Like To Do Now? [Help for this Page](#)

You have just created an approval process. However, you cannot activate this process until you define at least one approval step. Would you like to do that now?

- Yes, I'd like to create an approval step now.
- I'll do this later. Take me to the approval detail page to review what I've just created.
- I'll do this later. Take me back to the listing of all approval processes for this object.

[Go!](#)

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

Approval Processes

Approval Processes
Timesheet: Timesheet Approval

Process Definition Detail

Process Name	Timesheet Approval	Active	<input type="checkbox"/>
Unique Name	Timesheet_Approval	Next Automated Approver Determined By	
Description			
Entry Criteria			
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	TimeSheet Approval		
Initial Submitters	Timesheet Owner		
Created By	Kusuma Kumari, 1/2/2024, 12:10 AM	Modified By	Kusuma Kumari, 1/2/2024, 12:10 AM

Initial Submission Actions

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

You have not yet defined any approval steps

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

Process Definition Detail

Process Name	Timesheet Approval	Active	<input type="checkbox"/>
Unique Name	Timesheet_Approval	Next Automated Approver Determined By	
Description			
Entry Criteria			
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	TimeSheet Approval		
Initial Submitters	Timesheet Owner		
Created By	Kusuma Kumari, 1/2/2024, 12:10 AM	Modified By	Kusuma Kumari, 1/2/2024, 12:10 AM

Initial Submission Actions

Action	Type	Description
Record Lock		Lock the record from being edited

Initial Submission Actions dropdown menu:

- Task
- Email Alert
- Field Update**
- Outbound Message

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.

SETUP **Field Updates**

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit Save Save & New Cancel

Identification ! = Required Information

Name **Update Status to Submit for A**
 Unique Name **Update_Status_to_Submit_fm**
 Namespace Prefix Jpetto
 Description
 Object Timesheet
 Protected Component
 Field to Update **Status**
 Field Data Type Picklist
 Re-evaluate Workflow Rules after Field Change

Specify New Field Value

Picklist Options

The value above the current one
 The value below the current one
 A specific value **Submitted for Approval**

Step 21: Click Save.

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

Description

Entry Criteria

Record Editability Administrator **ONLY** Allow Submitters to Recall Approval Requests

Approval Assignment Email Template **TimeSheet Approval**

Initial Submitters Timesheet Owner

Created By **Kusuma Kumari**, 1/2/2024, 12:10 AM Modified By **Kusuma Kumari**, 1/2/2024, 2:54 AM

Initial Submission Actions ! Add Existing Add New

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Update Status to Submit for Approval

Approval Steps ! New Approval Step

 You have not yet defined any approval steps

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.

SETUP Approval Processes

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Select Approver

Let the submitter choose the approver manually.
 Automatically assign to queue.
 Automatically assign to approver(s).

When multiple approvers are selected:
 Approve or reject based on the **FIRST** response.
 Require **UNANIMOUS** approval from all selected approvers.

The approver's delegate may also approve this request.

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.

SETUP Approval Processes

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Approver Selection			User: Kusuma Kumari	Final Rejection

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record

Final Rejection Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

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.

SETUP
Field Updates

Edit Field Update
Update Status to Approved Help for this Page

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit Save Save & New Cancel

Identification Required Information

Name: Update Status to Approved
 Unique Name: Update_Status_to_Approved
 Namespace Prefix: Jpetto
 Description:
 Object: Timesheet
 Protected Component:
 Field to Update: Status
 Field Data Type: Picklist
 Re-evaluate Workflow Rules after Field Change:

Specify New Field Value

Picklist Options

The value above the current one
 The value below the current one
 A specific value: Approved

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.

SETUP
Approval Processes

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Approver Selection			User Kusuma Kumari	Final Rejection

Final Approval Actions Add Existing Add New

Action	Type	Description
Edit	Record Lock	Lock the record

Final Rejection Actions Add Existing Add New

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

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

SETUP
New Email Alert Help for this Page

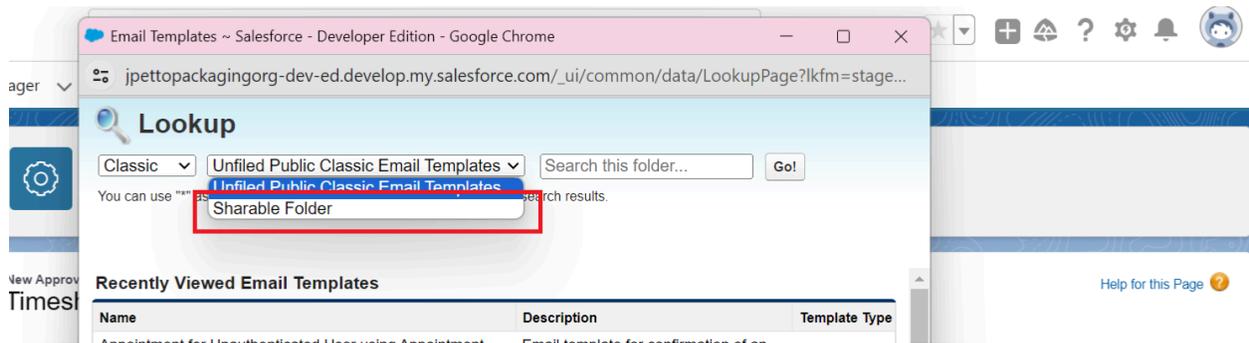
Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit Save Save & New Cancel

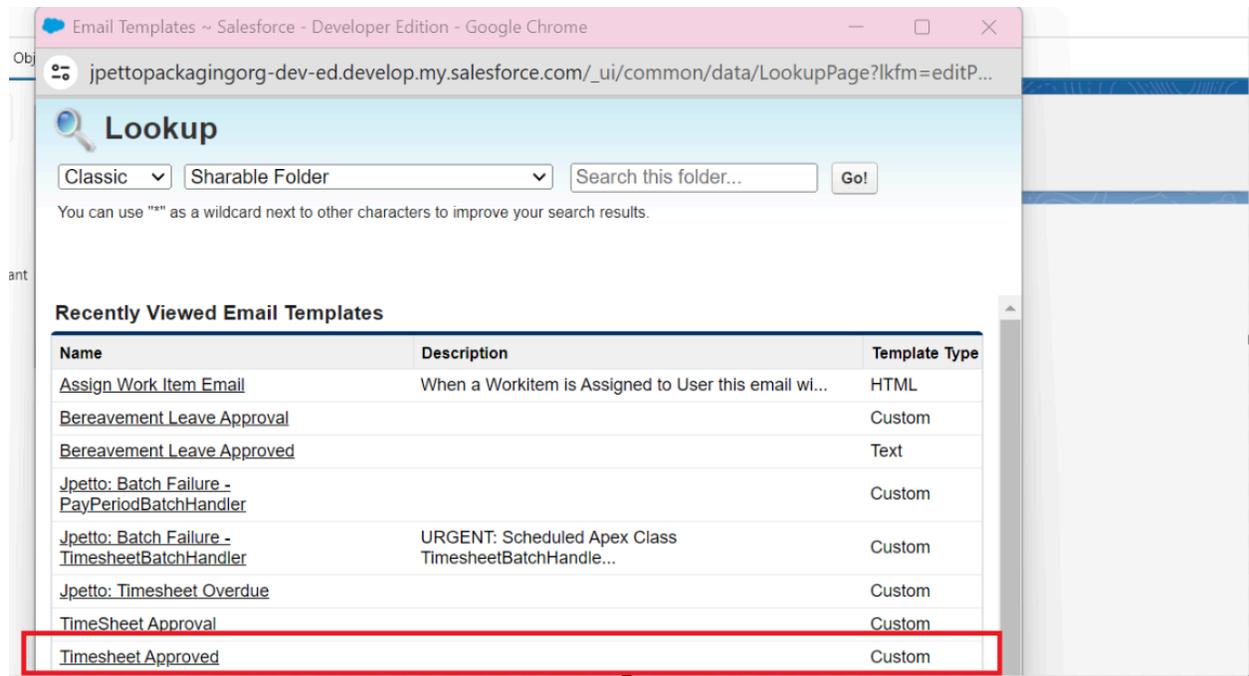
Edit Email Alert Required Information

Description: Email after Timesheet Approved
 Unique Name: Email_after_Timesheet_Appr
 Namespace Prefix: Jpetto
 Object: Timesheet
 Email Template:
 Protected Component:

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**.

SETUP
Email Alerts

New Email Alert Help for this Page

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit Save New & New Cancel

Edit Email Alert

Description: Email after Timesheet Approved
 Unique Name: Email_After_Timesheet_Approved
 NameSpace Prefix: juno
 Object: Timesheet
 Email Template: Timesheet Approved
 Protected Component:

Recipient Type: Search: Owner for: Find

Recipients:

Available Recipients	Selected Recipients
-None-	Timesheet Owner

Additional Email:

From email address: Current User's email address
 Make this address the default From email address for the object's email alerts.

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.

SETUP
Approval Processes

Final Approval Actions Add Existing Add New

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Email Alert	Email after Timesheet Approved
Edit Remove	Field Update	Update Status to Approved

Final Rejection Actions Add Existing Add New

Action	Type	Description
Edit	Record Lock	Unlock

Dropdown menu options: Task, Email Alert, **Field Update**, Outbound Message

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.

Field Updates

Field Update Edit [Save] [Save & New] [Cancel]

Identification ⓘ = Required Information

Name: Update Status to Rejected

Unique Name: Update_Status_to_Rejecter ⓘ

Namespace Prefix: Jpetto

Description: [Text Area]

Object: Timesheet

Protected Component:

Field to Update: Status

Field Data Type: Picklist

Re-evaluate Workflow Rules after Field Change: ⓘ

Specify New Field Value

Picklist Options

The value above the current one

The value below the current one

A specific value: Rejected

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.

Lookup

Classic | Sharable Folder | Search this folder... | Go!

You can use "*" as a wildcard next to other characters to improve your search results.

Recently Viewed Email Templates

Name	Description	Template Type
Assign Work Item Email	When a Workitem is Assigned to User this email wi...	HTML
Bereavement Leave Approval		Custom
Bereavement Leave Approved		Text
Jpetto: Batch Failure - PayPeriodBatchHandler		Custom
Jpetto: Batch Failure - TimesheetBatchHandler	URGENT: Scheduled Apex Class TimesheetBatchHandle...	Custom
Jpetto: Timesheet Overdue		Custom
TimeSheet Approval		Custom
Timesheet Approved		Custom
Timesheet Rejected		Custom

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.

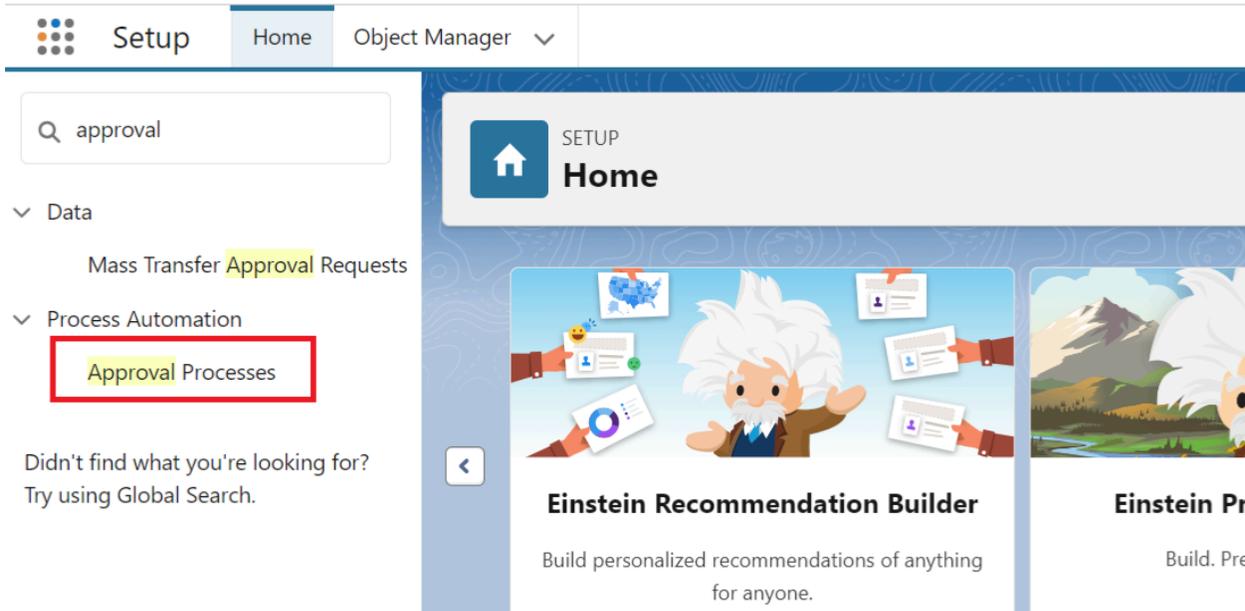
The screenshot shows the 'Approval Processes' setup page for 'Timesheet Approval'. The page title is 'Approval Processes' and the sub-title is 'Timesheet: Timesheet Approval'. There is a 'Help for this Page' link with a question mark icon. Below the title, there is a 'Process Definition Detail' section with several fields and buttons. The 'Activate' button is highlighted with a red box. The fields include: Process Name (Timesheet Approval), Unique Name (Timesheet_Approval), Description, Entry Criteria, Record Editability (Administrator ONLY), Approval Assignment Email Template (TimeSheet Approval), and Initial Submitters (Timesheet Owner). There are also buttons for 'Edit', 'Clone', 'Delete', and 'Activate'. A checkbox for 'Active' is present and unchecked. A 'Next Automated Approver Determined By' field is also visible.

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

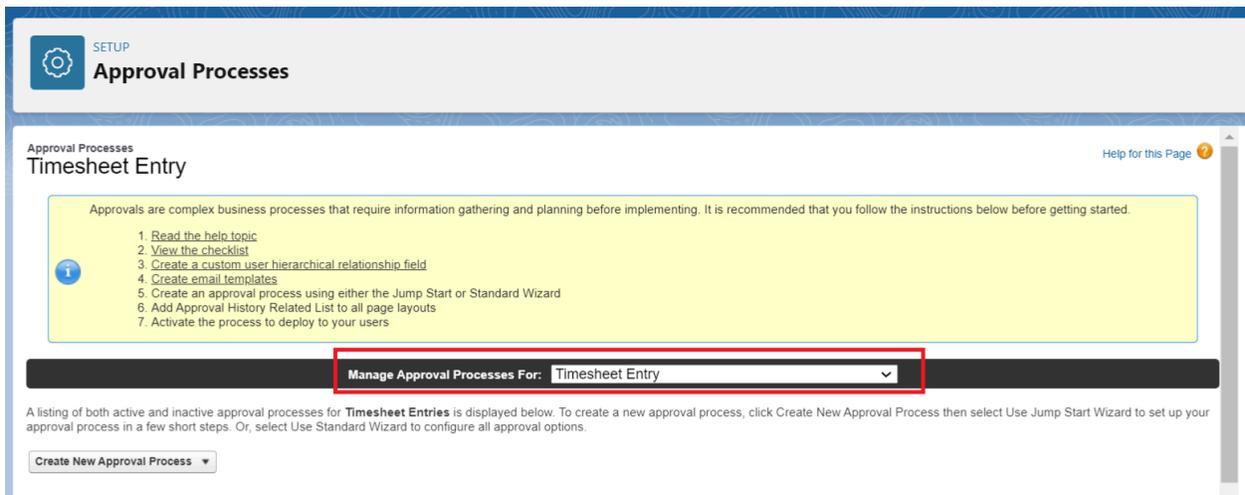
2. Bereavement Leave Approval

- 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.

SETUP
Approval Processes

3. Create a custom user hierarchical relationship field
4. Create email templates
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: Timesheet Entry

A listing of both active and inactive approval processes for **Timesheet Entries** is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

- Use Jump Start Wizard
- Use Standard Setup Wizard

Reorder

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.

SETUP
Approval Processes

Approval Process Edit
Bereavement Leave Approval

Help for this Page

Step 1. Enter Name and Description Step 1 of 6

Save Next Cancel

Enter a name and description for your new approval process.

Enter Name and Description ⓘ = Required information

Process Name: Bereavement Leave Approval

Unique Name: Bereavement_Leave_Approval ⓘ

Description:

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.

Approval Process Edit
Bereavement Leave Approval

Help for this Page

Step 4. Select Notification Templates Step 4 of 6

Previous Save Next Cancel

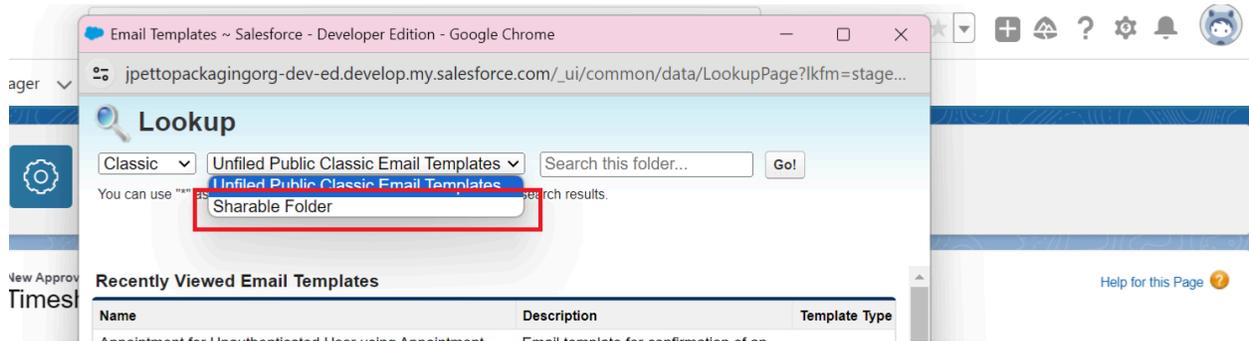
Select the email template that will be used to notify approvers that an approval request has been assigned to them. Note that this template will be used for all steps for this process. [Create a new email template](#)

Email Template

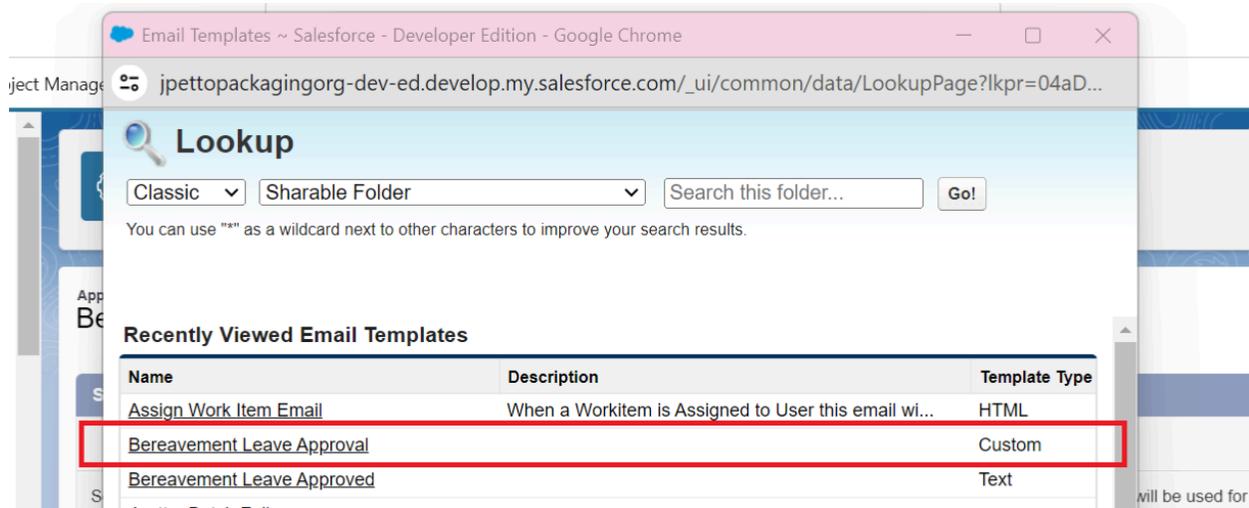
Approval Assignment Email Template ⓘ

Previous Save Next Cancel

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

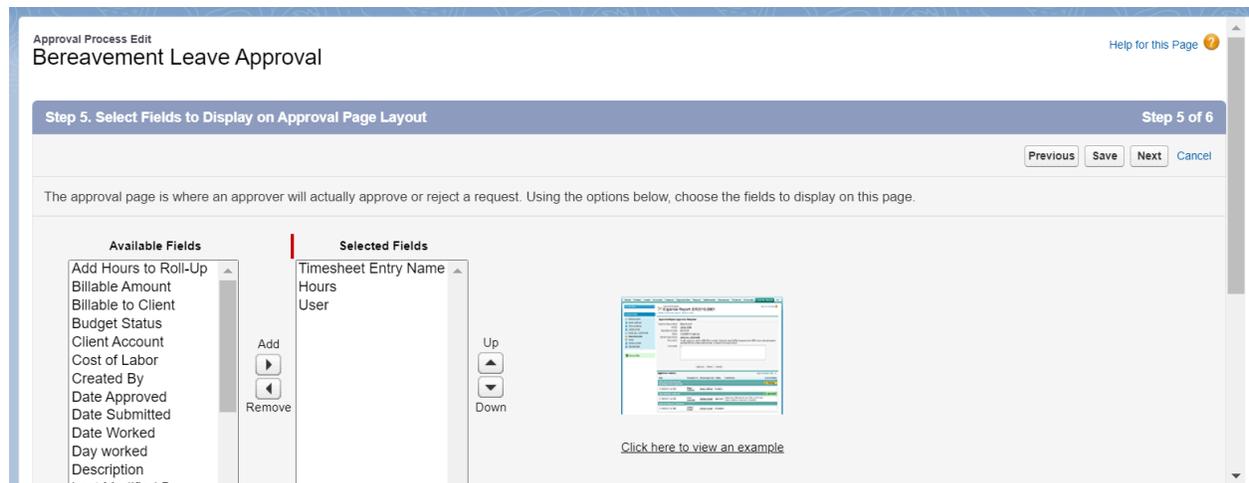


Step 11: Select **Bereavement Leave Approval** email template from the list.



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**.

SETUP
Approval Processes

What Would You Like To Do Now? [Help for this Page](#)

You have just created an approval process. However, you cannot activate this process until you define at least one approval step. Would you like to do that now?

Yes, I'd like to create an approval step now.

I'll do this later. Take me to the approval detail page to review what I've just created.

I'll do this later. Take me back to the listing of all approval processes for this object.

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.

Approval Processes
Timesheet Entry: Bereavement Leave Approval
[Back to Approval Process List](#) [Help for this Page](#)

Process Definition Detail

Process Name	Bereavement Leave Approval	Active	<input checked="" type="checkbox"/>
Unique Name	Bereavement_Leave_Approval	Next Automated Approver Determined By	
Description			
Entry Criteria			
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	Bereavement Leave Approval		
Initial Submitters	Record Creator		
Created By	Vinay SA, 10/31/2023, 4:18 AM	Modified By	Kusuma Kumari, 1/2/2024, 4:43 AM

Initial Submission Actions

Action	Type	Description
	Record Lock	Lock the record
	Email Alert	Bereavement Leave Approval

Task
Email Alert
Field Update

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.

Name

Unique Name

Namespace Prefix

Description

Object Timesheet Entry

Protected Component

Field to Update Timesheet Entry: Leave Approval Status

Field Data Type Picklist

Re-evaluate Workflow Rules after Field Change

Specify New Field Value

Picklist Options

The value above the current one

The value below the current one

A specific value

Step 21: Click **Save**.

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

Description

Entry Criteria

Record Editability Administrator **ONLY** Allow Submitters to Recall Approval Requests

Approval Assignment Email Template TimeSheet Approval

Initial Submitters Timesheet Owner

Created By Kusuma Kumari, 1/2/2024, 12:10 AM Modified By Kusuma Kumari, 1/2/2024, 2:54 AM

Initial Submission Actions

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit Remove	Field Update	<u>Update Status to Submit for Approval</u>

Approval Steps

 You have not yet defined any approval steps

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.

Name: Bereavement Leave Approv

Unique Name: Bereavement_Leave_Appr

Namespace Prefix: Jpetto

Description:

Object: Timesheet Entry

Protected Component:

Field to Update: Timesheet Entry: Leave Approval Status

Field Data Type: Picklist

Re-evaluate Workflow Rules after Field Change:

Specify New Field Value

Picklist Options

The value above the current one

The value below the current one

A specific value: Bereavement Leave Approved

Buttons: Save, Save & New, Cancel

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.

SETUP Approval Processes

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Approver Selection			User:Kusuma Kumari	Final Rejection

Final Approval Actions

Add Existing Add New

Action	Type	Description
Edit	Record Lock	Lock the record

Task

Email Alert

Field Update

Outbound Message

Final Rejection Actions

Add Existing Add New

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

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.

Email Templates ~ Salesforce - Developer Edition - Google Chrome

Lookup

Classic Unfiled Public Classic Email Templates Search this folder... Go!

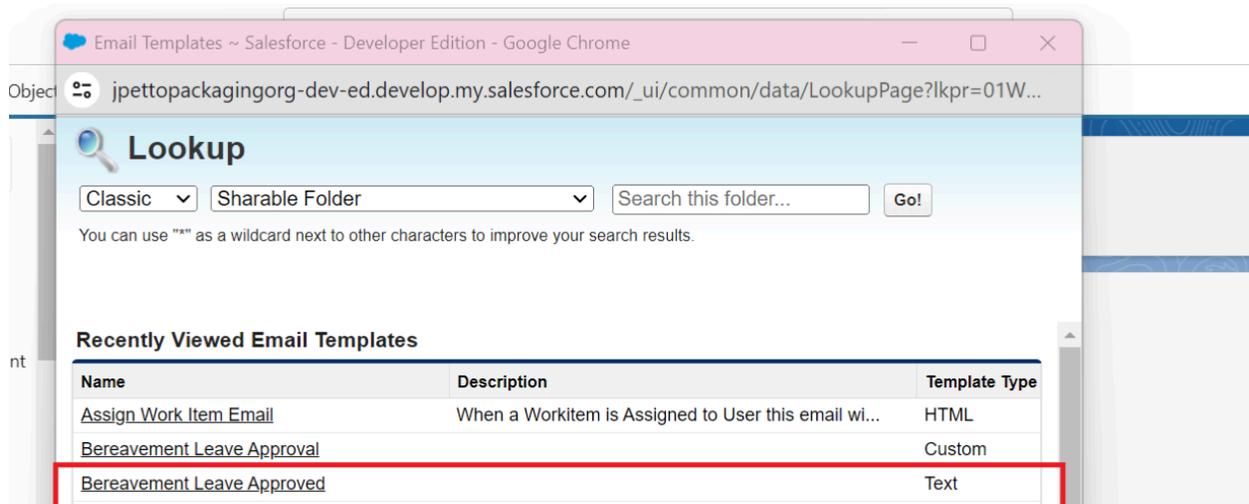
You can use "Unfiled Public Classic Email Templates" search results.

Sharable Folder

Recently Viewed Email Templates

Name	Description	Template Type
Appointment for Unauthenticated Users using Appointment	Email template for confirmation of ap	

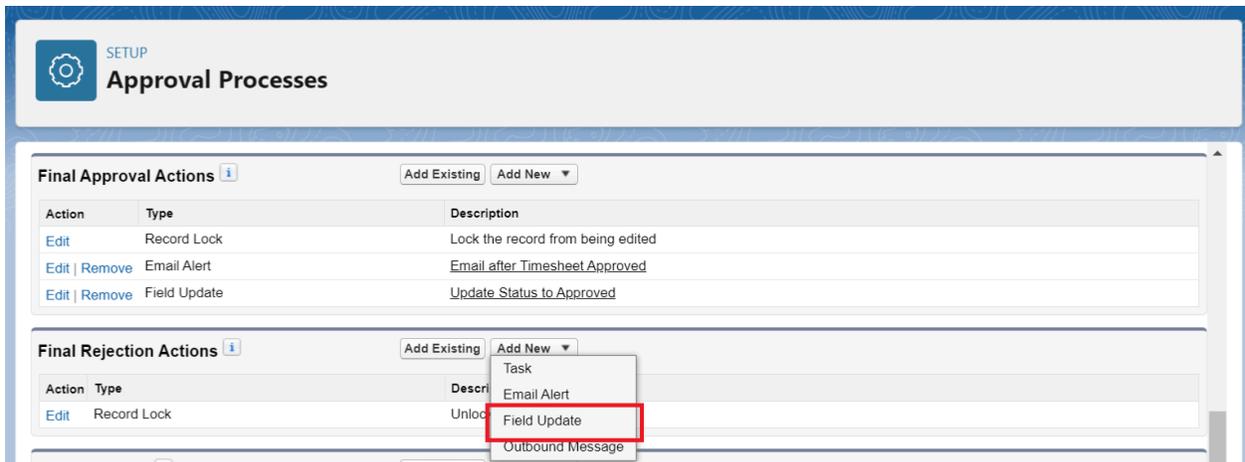
Step 34: Select **Bereavement Leave Approved** email template from the list.



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.

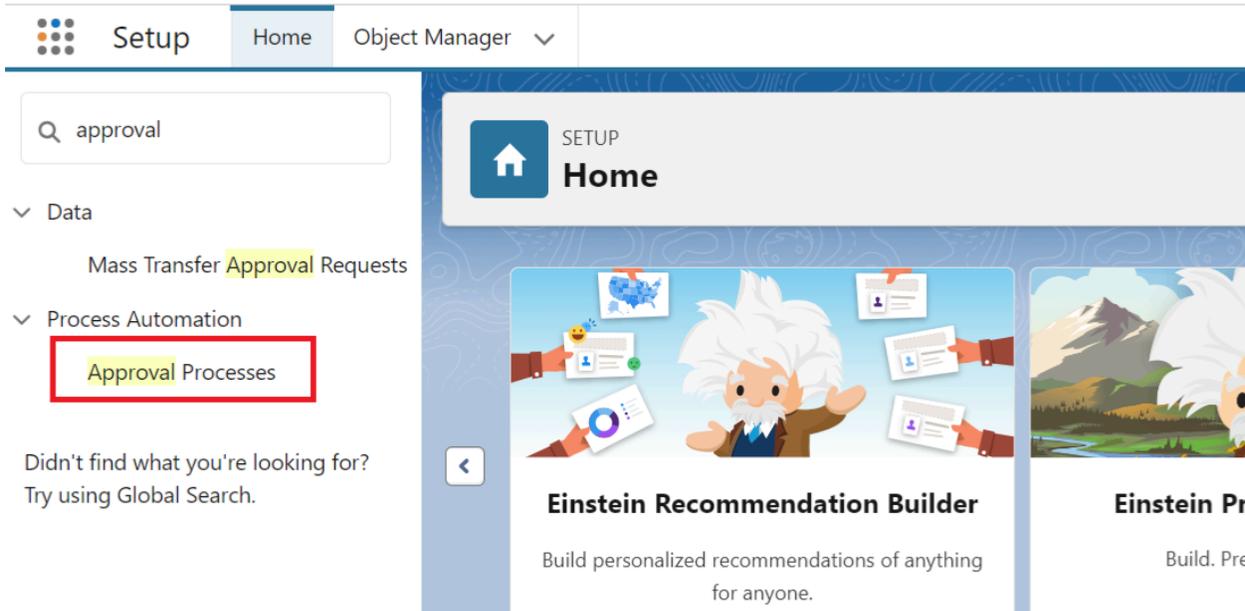
Step 42: Click on the **Activate** button.

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

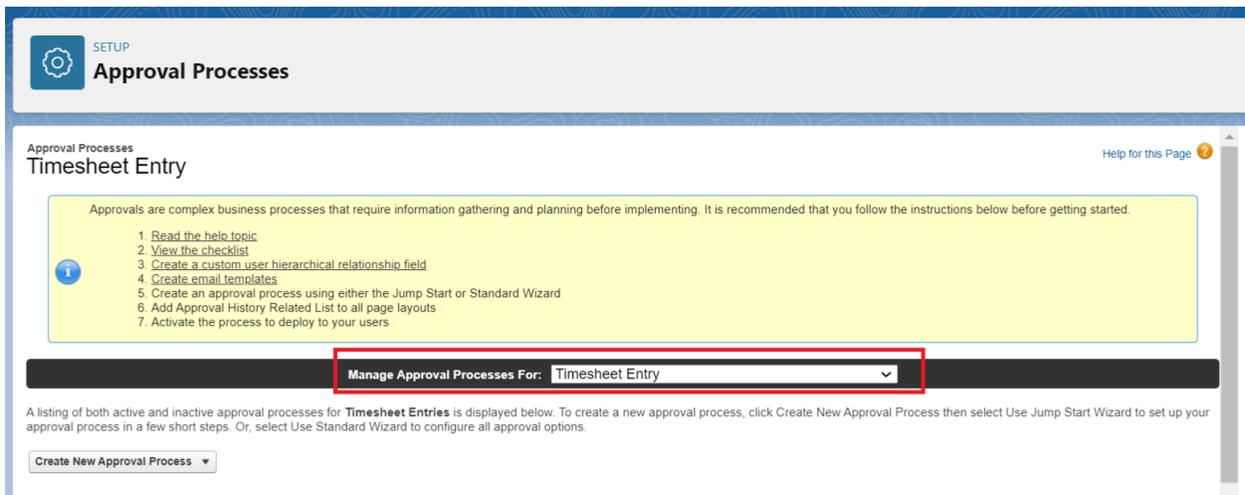
3. Vacation Leave Approval

- 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.

SETUP
Approval Processes

3. Create a custom user hierarchical relationship field
4. Create email templates
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: Timesheet Entry

A listing of both active and inactive approval processes for **Timesheet Entries** is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

- Use Jump Start Wizard
- Use Standard Setup Wizard

Reorder

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.

SETUP
Approval Processes

Approval Process Edit
Vacation Leave Approval

Help for this Page

Step 1. Enter Name and Description Step 1 of 6

Save Next Cancel

Enter a name and description for your new approval process.

Enter Name and Description = Required Information

Process Name: Vacation Leave Approval

Unique Name: Vacation_Leave_Approval

Description: Vacation Leave Approval

Save Next Cancel

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.

Approval Process Edit
Bereavement Leave Approval

Help for this Page

Step 4. Select Notification Templates Step 4 of 6

Previous Save Next Cancel

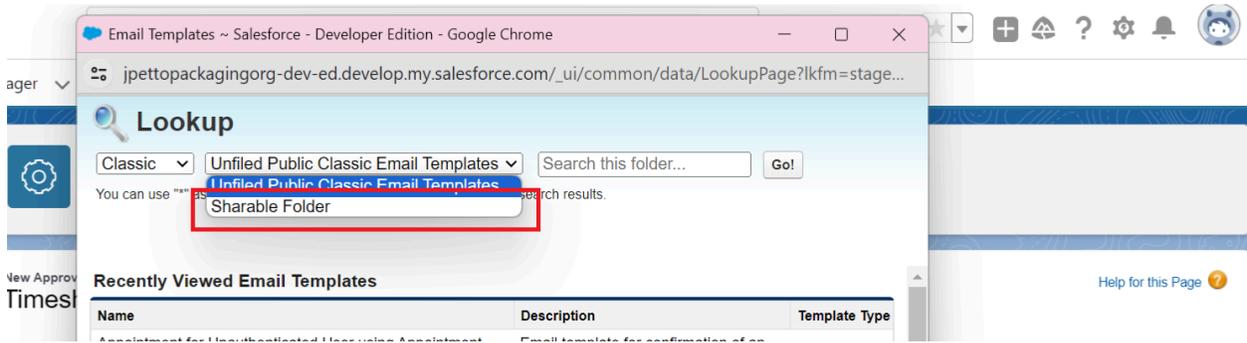
Select the email template that will be used to notify approvers that an approval request has been assigned to them. Note that this template will be used for all steps for this process. [Create a new email template](#)

Email Template

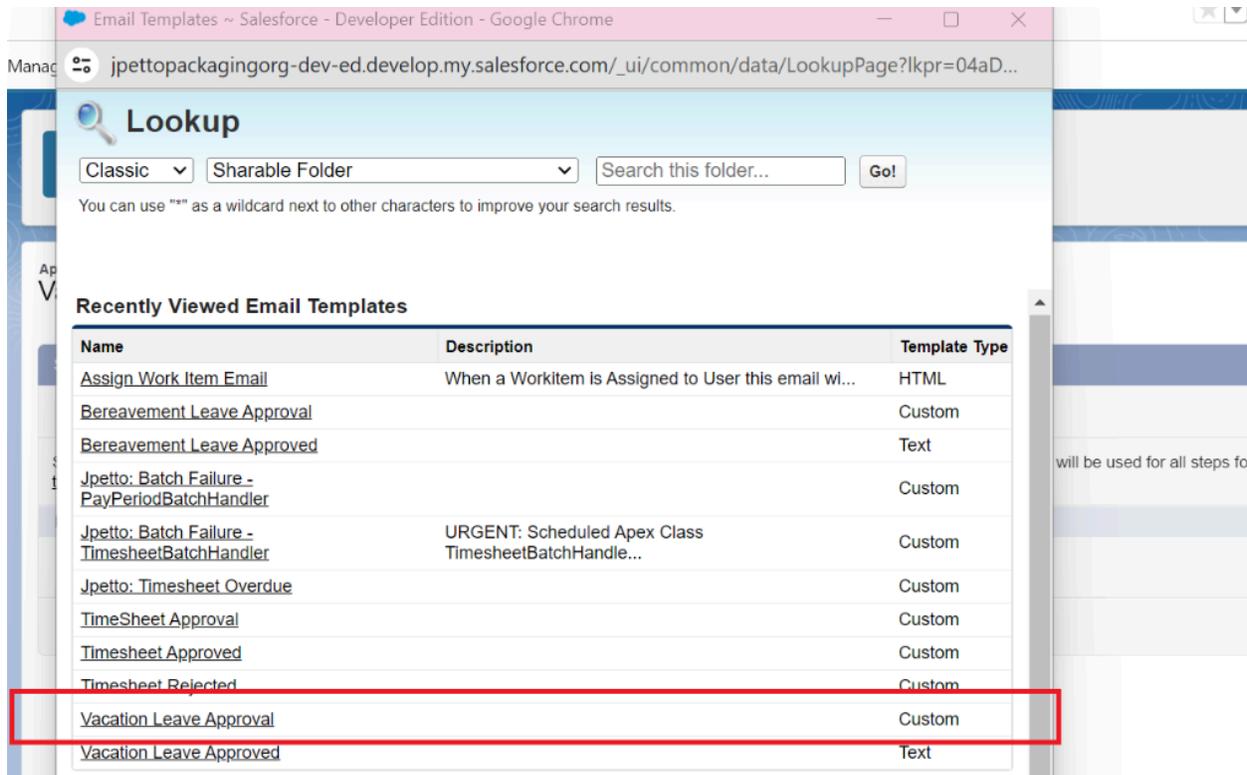
Approval Assignment Email Template

Previous Save Next Cancel

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.

Approval Process Edit
Vacation Leave Approval Help for this Page ?

Step 5. Select Fields to Display on Approval Page Layout Step 5 of 6

Previous Save Next Cancel

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Available Fields	Selected Fields
Add Hours to Roll-Up	Timesheet Entry Name
Billable Amount	Leave Approval Status
Billable to Client	User
Budget Status	
Client Account	
Cost of Labor	
Created By	
Date Approved	
Date Submitted	
Date Worked	
Day worked	
Description	
Hours	

[Click here to view an example](#)

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**.

SETUP
Approval Processes

What Would You Like To Do Now? Help for this Page ?

You have just created an approval process. However, you cannot activate this process until you define at least one approval step. Would you like to do that now?

Yes, I'd like to create an approval step now.
 I'll do this later. Take me to the approval detail page to review what I've just created.
 I'll do this later. Take me back to the listing of all approval processes for this object.

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.

Approval Processes

Process Definition Detail [Edit] [Clone] [Deactivate]

Process Name	Vacation Leave Approval	Active	<input checked="" type="checkbox"/>
Unique Name	Vacation_Leave_Approval	Next Automated Approver Determined By	
Description	Vacation Leave Approval		
Entry Criteria			
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	Vacation Leave Approval		
Initial Submitters	Record Creator		
Created By	Vinay SA, 10/31/2023, 3:46 AM	Modified By	Kusuma Kumari, 1/2/2024, 6:36 AM

Initial Submission Actions [Add Existing] [Add New]

Action	Type	Description
Record Lock		Lock the record
Email Alert		Vacation Leave Approval
		Field Update

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.

Name: Vacation Leave Submitted For Approval

Unique Name: Vacation_Leave_Submitted

Namespace Prefix: Jpetto

Description: [Empty text box]

Object: Timesheet Entry

Protected Component:

Field to Update: Timesheet Entry: Leave Approval Status

Field Data Type: Picklist

Re-evaluate Workflow Rules after Field Change:

Specify New Field Value

Picklist Options

The value above the current one

The value below the current one

A specific value: Vacation Leave Submitted For Approval

[Save] [Save & New] [Cancel]

Step 21: Click **Save**.

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

Description	
Entry Criteria	
Record Editability	Administrator ONLY Allow Submitters to Recall Approval Requests <input checked="" type="checkbox"/>
Approval Assignment Email Template	TimeSheet Approval
Initial Submitters	Timesheet Owner
Created By	Kusuma Kumari, 1/2/2024, 12:10 AM Modified By Kusuma Kumari, 1/2/2024, 2:54 AM

Initial Submission Actions Add Existing Add New ▼

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Update Status to Submit for Approval

Approval Steps New Approval Step

You have not yet defined any approval steps

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**.

SETUP

Approval Processes

Previous Save Cancel

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Select Approver

Let the submitter choose the approver manually.

Automatically assign to queue.

Automatically assign to approver(s).

User ▼

Kusuma Kumari

🔍

[Add Row](#) [Remove Row](#)

When multiple approvers are selected:

Approve or reject based on the **FIRST** response.

Require **UNANIMOUS** approval from all selected approvers.

The approver's delegate may also approve this request. i

Previous Save Cancel

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.

Approval Processes

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Approver Selection			User Kusuma Kumari	Final Rejection

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record

Final Rejection Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

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.

Field Update Edit [Save] [Save & New] [Cancel]

Identification ⓘ = Required Information

Name: Vacation Leave Approved

Unique Name: Vacation_Leave_Approved ⓘ

Namespace Prefix: Jpetto

Description: [Text Area]

Object: Timesheet Entry

Protected Component:

Field to Update: Timesheet Entry: Leave Approval Status

Field Data Type: Picklist

Re-evaluate Workflow Rules after Field Change: ⓘ

Specify New Field Value

Picklist Options

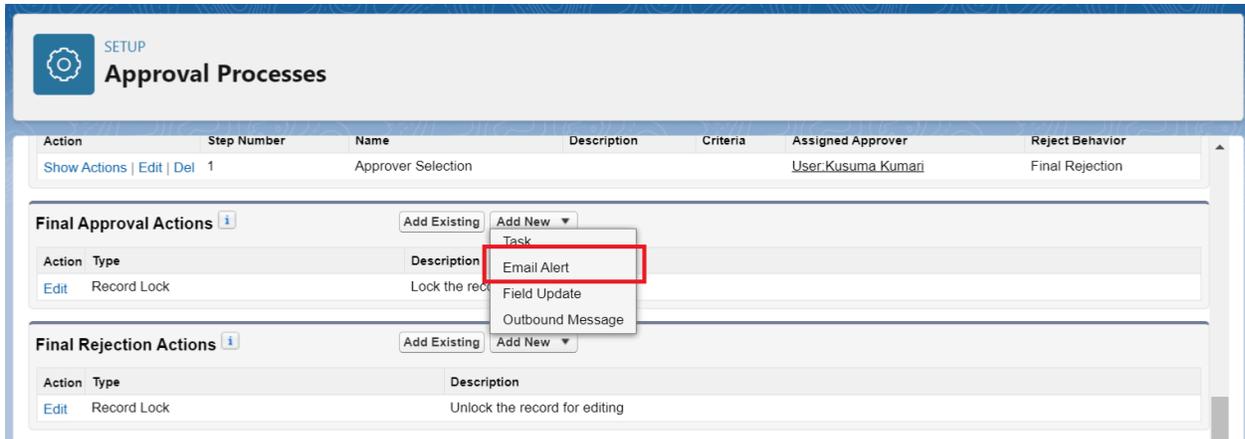
The value above the current one

The value below the current one

A specific value: Vacation Leave Approved

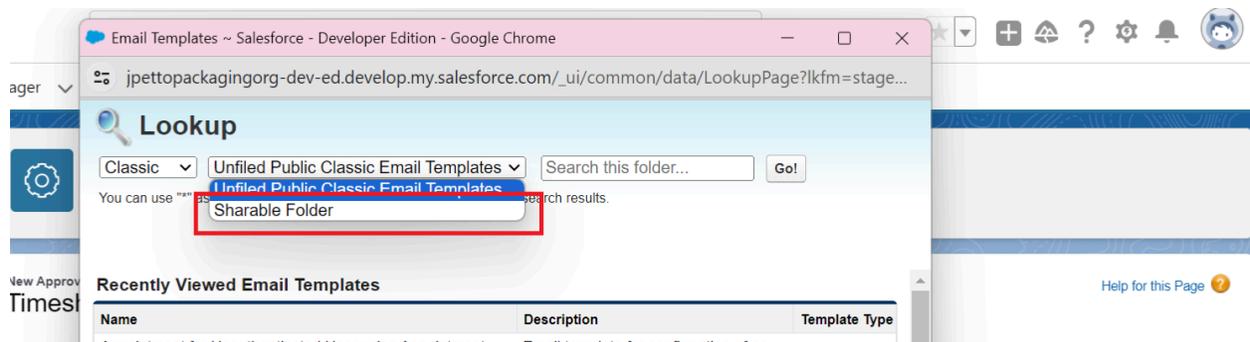
Step 30: Click **Save**.

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.

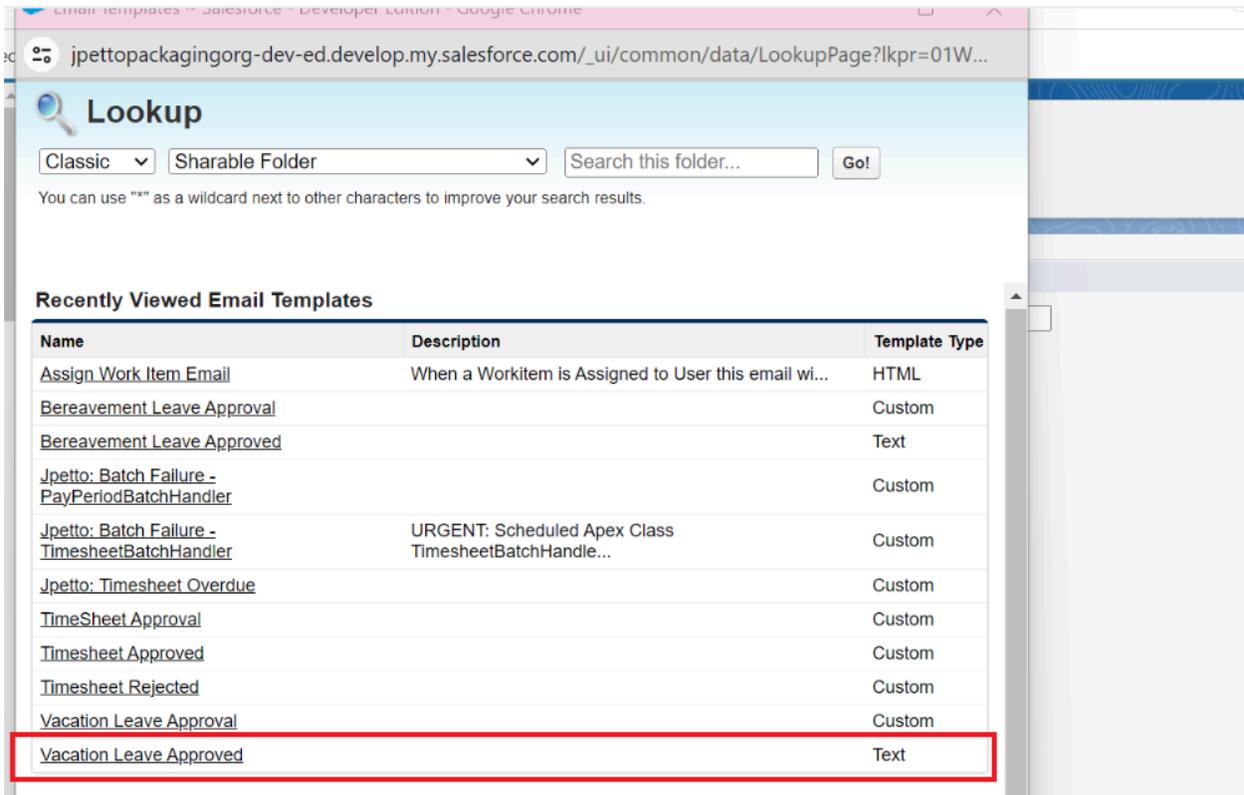


Step 32: Give your preferred name to the email alert, and click on the **Lookup** of **Email Template** field.

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



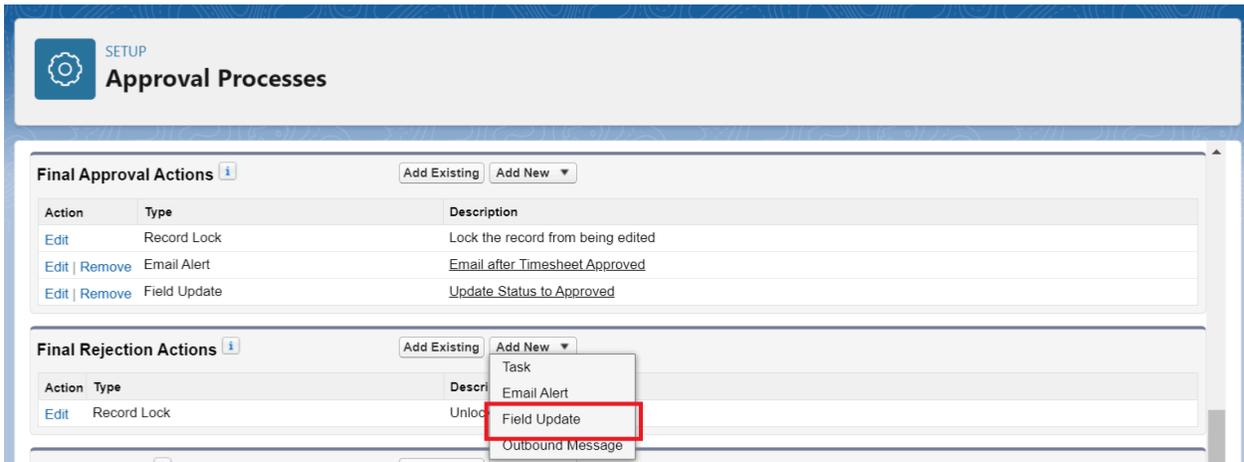
Step 34: Select **Vacation Leave Approved** email template from the list.



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.

Name: Vacation Leave Rejected
Unique Name: Vacation_Leave_Rejected
Namespace Prefix: Jpetto
Description: [Empty text area]
Object: Timesheet Entry
Protected Component: [Unchecked]
Field to Update: Timesheet Entry: Leave Approval Status
Field Data Type: Picklist
Re-evaluate Workflow Rules after Field Change: [Checked]

Specify New Field Value

Picklist Options

The value above the current one
 The value below the current one
 A specific value: Vacation Leave Rejected

Save Save & New Cancel

Step 40: Click **Save**.

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

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

Approval Processes
Timesheet Entry: Vacation Leave Approval
Back to Approval Process List

Process Definition Detail

Edit Clone Delete **Activate**

Process Name	Vacation Leave Approval	Active	<input type="checkbox"/>
Unique Name	Vacation_Leave_Approval	Next Automated Approver	Determined By
Description	Vacation Leave Approval		

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

Validation Rules

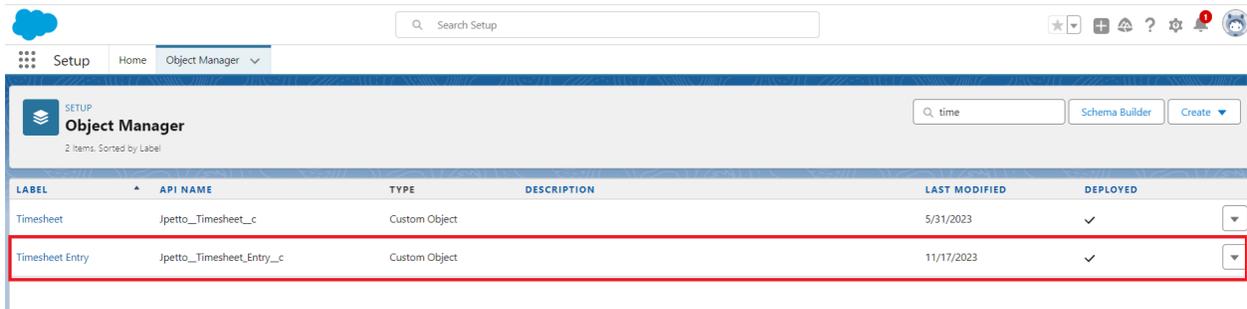
Below are a few of the validation rules for user's knowledge to set up as per their preferences.

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:

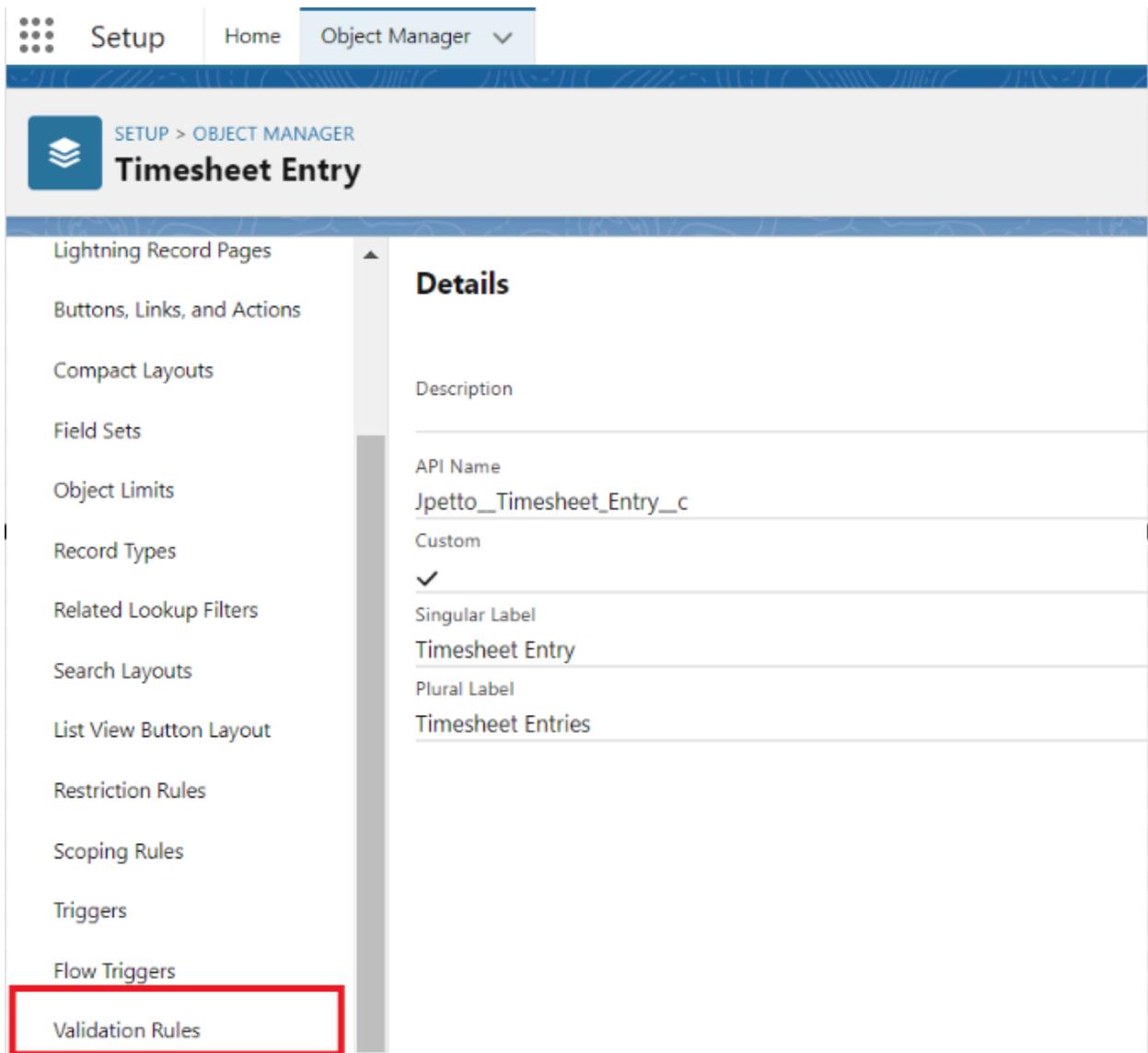
Step 1: From **Object Manager** select the **Timesheet Entry** object.



The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the text "Search Setup". Below the navigation tabs (Setup, Home, Object Manager), the "Object Manager" section is active. It displays a list of objects with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. Two objects are listed: "Timesheet" and "Timesheet Entry". The "Timesheet Entry" row is highlighted with a red border.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Timesheet	Jpetto_Timesheet_c	Custom Object		5/31/2023	✓
Timesheet Entry	Jpetto_Timesheet_Entry_c	Custom Object		11/17/2023	✓

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



The screenshot shows the Salesforce Object Manager interface for the "Timesheet Entry" object. The left sidebar contains a list of configuration sections: Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The "Validation Rules" section is highlighted with a red border. The main content area shows the "Details" for the "Validation Rule" section, with the following fields: Description, API Name (Jpetto_Timesheet_Entry_c), Custom (checked), Singular Label (Timesheet Entry), and Plural Label (Timesheet Entries).

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

SETUP > OBJECT MANAGER
Timesheet Entry

Details
Fields & Relationships

Validation Rules
2 Items. Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
-----------	----------------	---------------	--------	-------------

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`

Timesheet Entry Validation Rule Help for this Page

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit Save Save & New Cancel

Rule Name:

Namespace Prefix:

Active:

Description:

Error Condition Formula Required Information

Example: `Discount_Percent__c > 0.30` [More Examples...](#)
Display an error if Discount is more than 30%
If this formula expression is **true**, display the text defined in the Error Message area

`Jpetto__Hours__c <= 0.00`

Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

ABS(number)

Quick Tips
• [Operators & Functions](#)

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

Message: `Hours should be greater than Zero`

Error Message

Example: `Discount percent cannot exceed 30%`
This message will appear when Error Condition formula is **true**

Error Message:

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field

Save Save & New Cancel

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.

Setup Home Object Manager

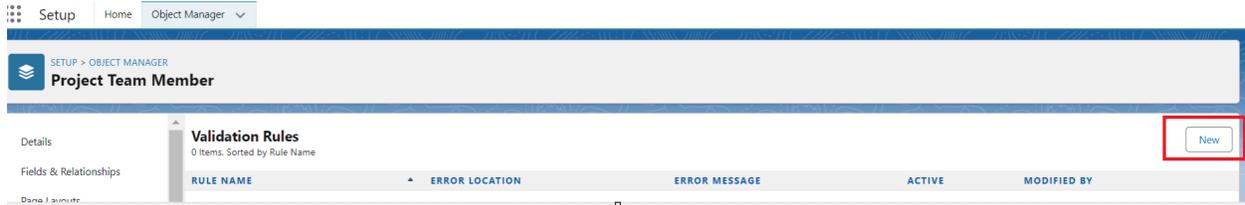
Object Manager 1 Items. Sorted by Label

Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Project Team Member	Jpetto__Project_Team_Member_c	Custom Object		6/15/2023	✓

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

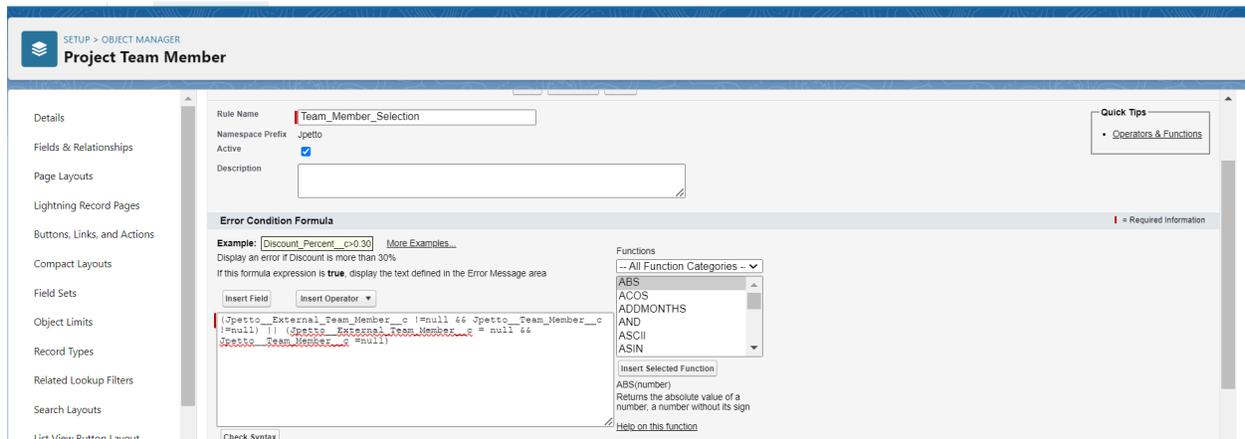
Step 3: Click on the **New** button.



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

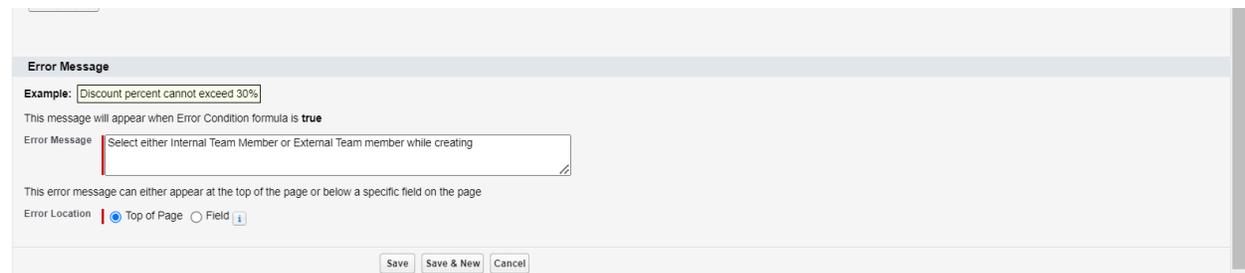
Step 5: Add the formula mentioned below to the **Error Condition Formula** section.

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 Internal Team Member or an External Team member while creating`

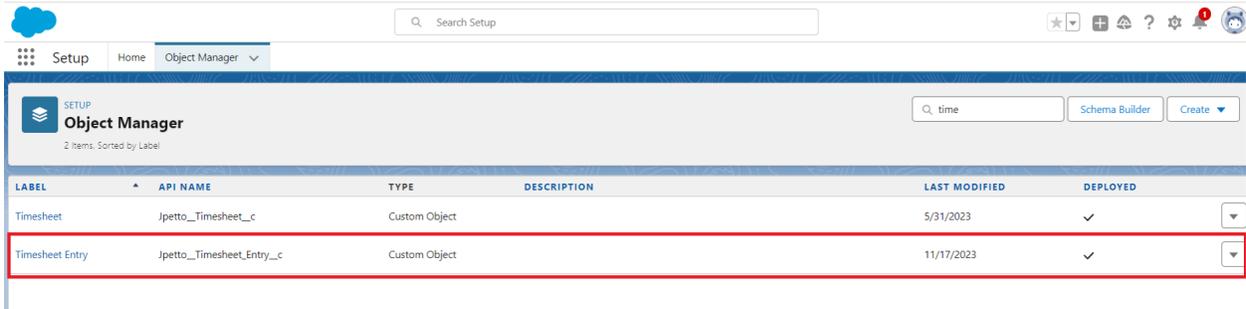


Step 7: **Save** the validation rule.

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

To add this rule follow the below procedure:

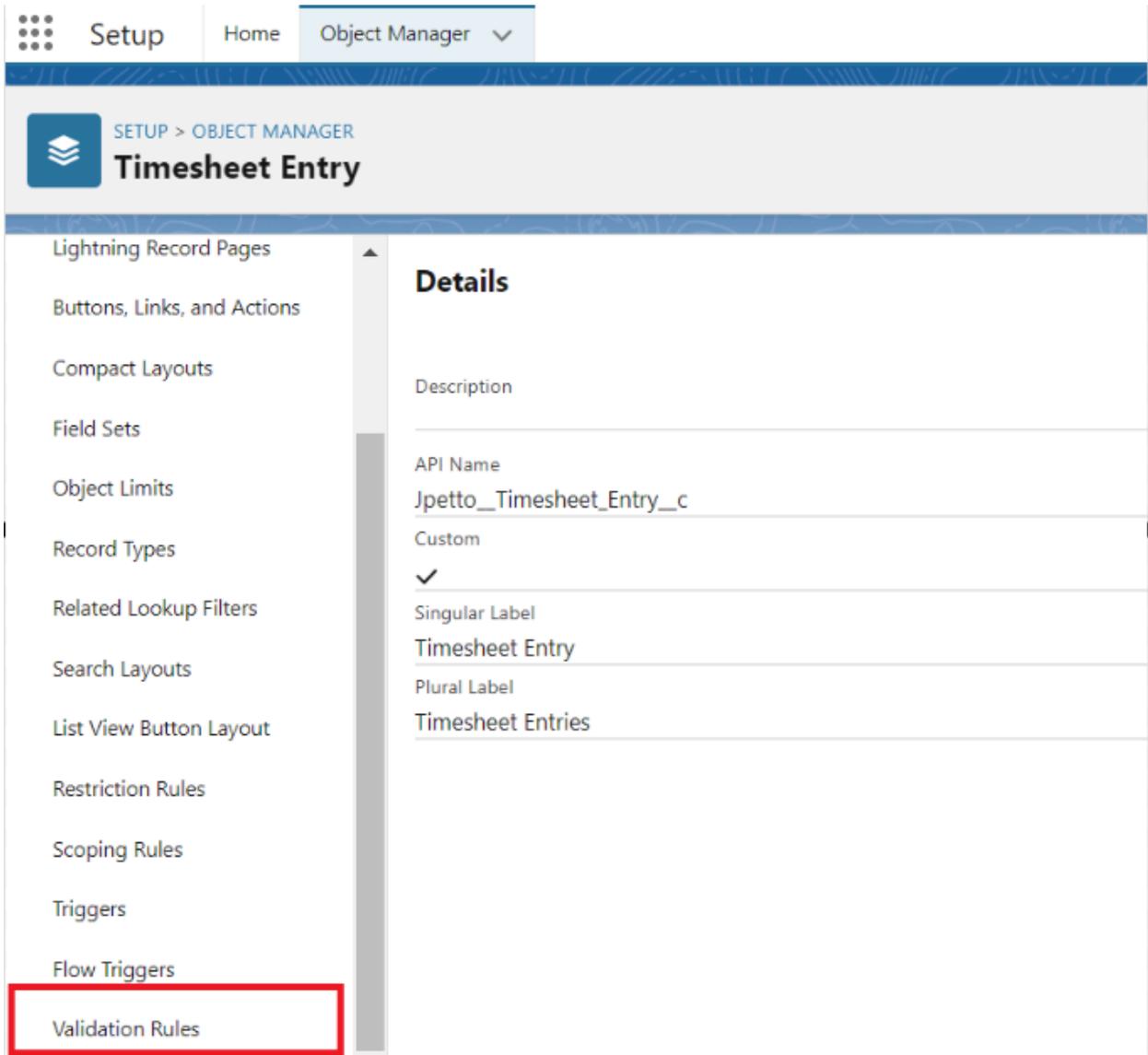
Step 1: From **Object Manager** select the **Timesheet Entry** object.



The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the text "Search Setup". Below the search bar, there are navigation tabs for "Setup", "Home", and "Object Manager". The main content area displays a table of objects. The table has columns for "LABEL", "API NAME", "TYPE", "DESCRIPTION", "LAST MODIFIED", and "DEPLOYED". Two objects are listed: "Timesheet" and "Timesheet Entry". The "Timesheet Entry" row is highlighted with a red border.

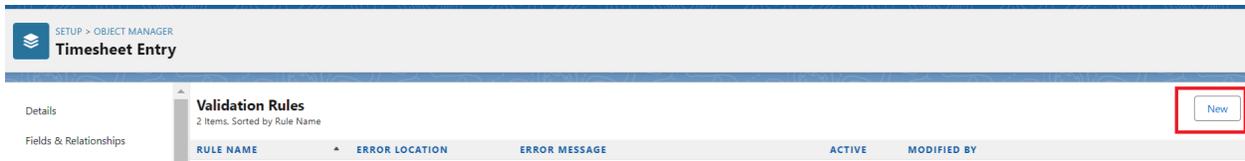
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Timesheet	Jpetto_Timesheet_c	Custom Object		5/31/2023	✓
Timesheet Entry	Jpetto_Timesheet_Entry_c	Custom Object		11/17/2023	✓

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



The screenshot shows the Salesforce Object Manager interface for the "Timesheet Entry" object. The left sidebar contains a list of configuration sections: "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", "Object Limits", "Record Types", "Related Lookup Filters", "Search Layouts", "List View Button Layout", "Restriction Rules", "Scoping Rules", "Triggers", "Flow Triggers", and "Validation Rules". The "Validation Rules" section is highlighted with a red border. The main content area displays the "Details" section for the object, showing fields for "Description", "API Name" (Jpetto_Timesheet_Entry_c), "Custom" (checked), "Singular Label" (Timesheet Entry), and "Plural Label" (Timesheet Entries).

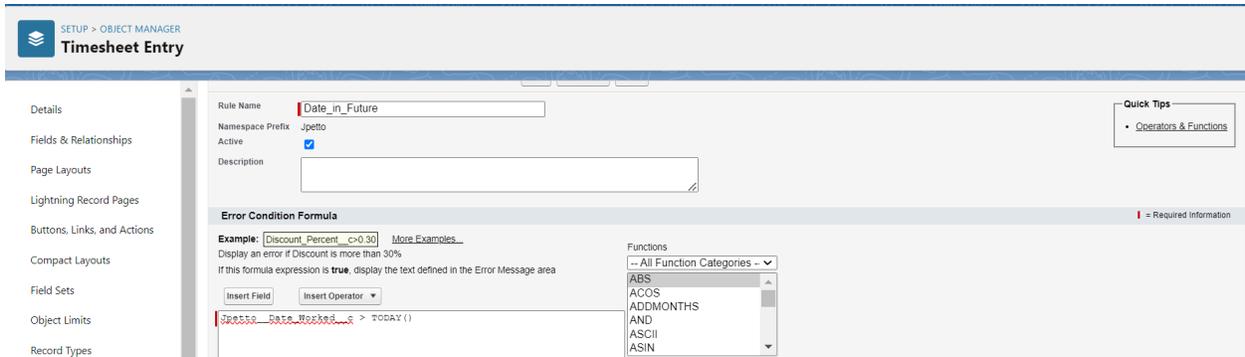
Step 3: Click on the **New** button.



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.

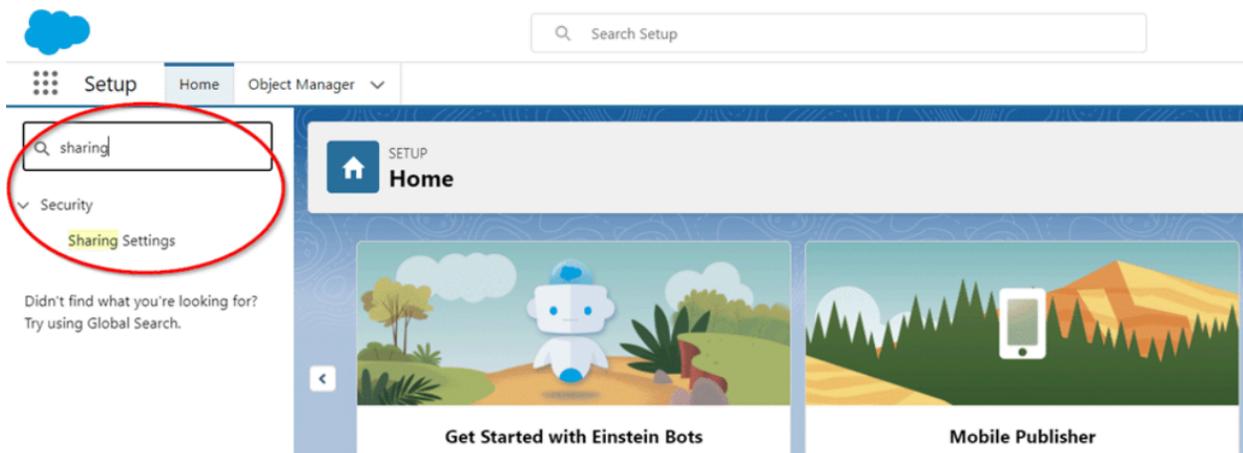
Sharing Rules

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.

SETUP Sharing Settings

Error Log Sharing Rules [New](#) [Recalculate](#) [Error Log Sharing Rules Help](#)

No sharing rules specified.

Pay Period Sharing Rules [New](#) [Recalculate](#) [Pay Period Sharing Rules Help](#)

No sharing rules specified.

Project Sharing Rules [New](#) [Recalculate](#) [Project Sharing Rules Help](#)

Action	Criteria	Shared With	Access Level
Edit Del	Project: Created By NOT EQUAL TO	Role: CEO	Read/Write

Project Team Member Sharing Rules [New](#) [Recalculate](#) [Project Team Member Sharing Rules Help](#)

No sharing rules specified.

Reconciliation Sharing Rules [New](#) [Recalculate](#) [Reconciliation Sharing Rules Help](#)

No sharing rules specified.

Related Work Item Sharing Rules [New](#) [Recalculate](#) [Related Work Item Sharing Rules Help](#)

No sharing rules specified.

Timesheet Sharing Rules [New](#) [Recalculate](#) [Timesheet Sharing Rules Help](#)

No sharing rules specified.

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

SETUP Sharing Settings

You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name

Label

Rule Name ⓘ

Description

Step 2: Select your rule type

Rule Type Based on record owner Based on criteria

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

Setup **Timesheet Sharing Rule** [Help for this Page](#)

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name ⓘ = Required Information

Label

Rule Name ⓘ

Description

Step 2: Select your rule type

Rule Type Based on record owner Based on criteria Guest user access, based on criteria

Step 3: Select which records to be shared

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.

The screenshot shows the configuration steps for a sharing rule:

- Step 1: Rule Name**
 - Label: Timesheet Sharing
 - Rule Name: Timesheet_Sharing
 - Description: (empty text area)
- Step 2: Select your rule type**
 - Rule Type: Based on record owner, Based on criteria, Guest user access, based on criteria
- Step 3: Select which records to be shared**
 - Criteria table:

Criteria	Field	Operator	Value	
	User ID	equals	005D000xxxxxxxxxxx	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
 - Additional Options: Include records owned by users who can't have an assigned role

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

The screenshot shows the configuration steps for sharing users and access levels:

- Step 4: Select the users to share with**
 - Share with: Public Groups (selected), --- Select One ---
- Step 5: Select the level of access for the users**
 - (This section is partially visible in this screenshot)

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

The screenshot shows the configuration steps for sharing users and access levels:

- Step 4: Select the users to share with**
 - Share with: Public Groups (selected), --- Select One ---
- Step 5: Select the level of access for the users**
 - Default Account and Contract Access: Read Only (selected)
 - Opportunity Access: Private (selected)
 - Case Access: Private (selected)

Buttons: Save, Cancel

Your sharing rule is now created.