MYTECHBESTFRIEND

PROJECT MANAGEMENT EXPRESS

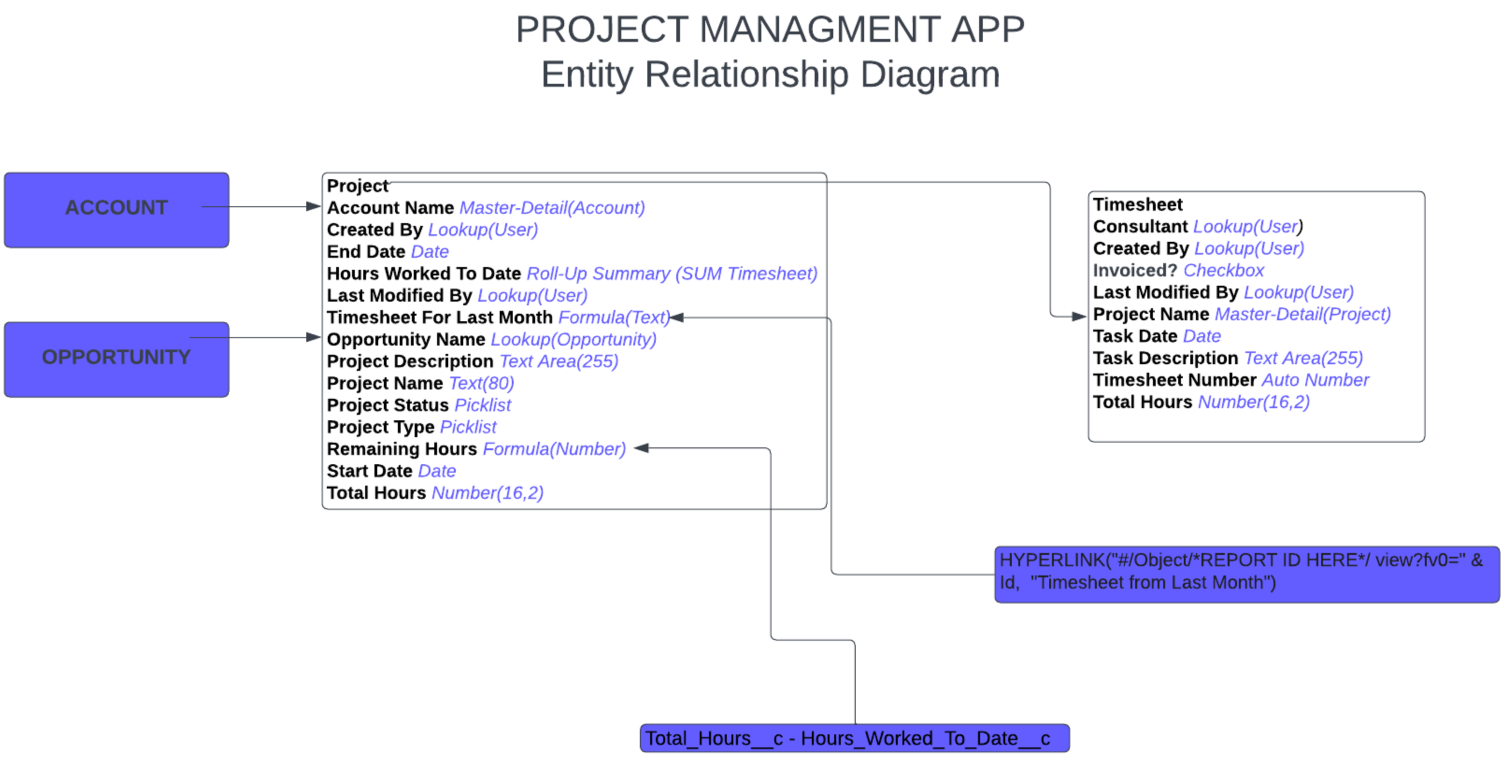
2023

INNOVATIVE & COLLABORATIVE

MAIA YOUNG

Contents

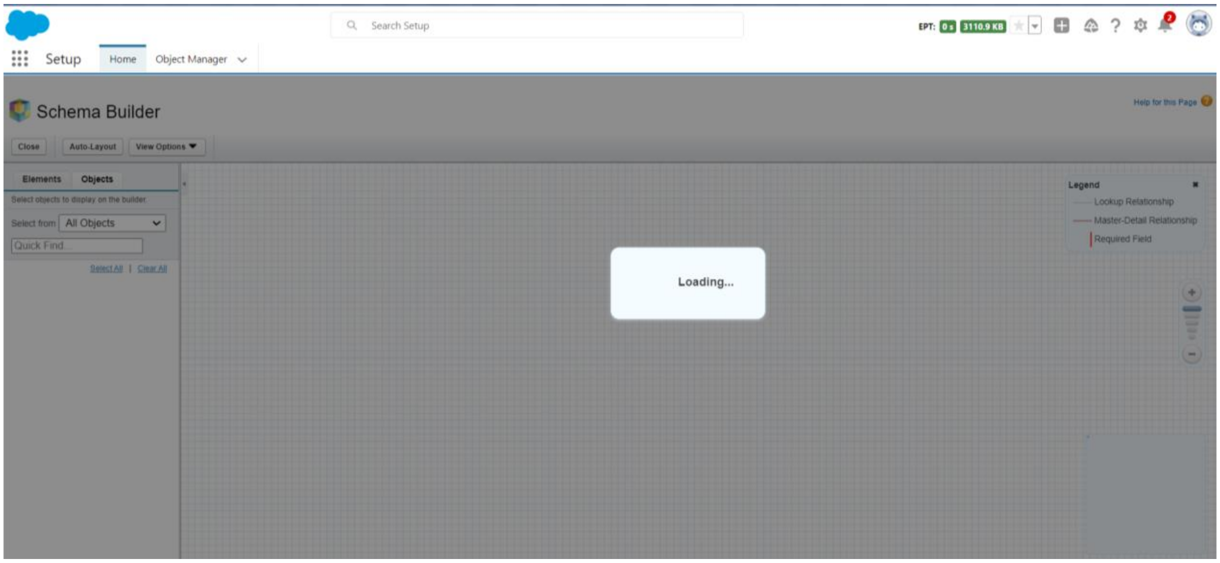
App Outline



Project Management Express is a project management application that allows project managers to view the details of their assigned projects easily. As well as the start and end dates, project Management Express displays the project type, such as fixed price or time and material, and the status of the project, such as "not started", "ongoing", or "completed". Project Managers can also log their work hours, submit Timesheets, and see their total hours allotted to complete the project. They can also view any remaining hours as well as their current hours worked for a particular project. Additionally, there is a field for invoicing that shows whether a Timesheet has been invoiced or not. PM Express is a quick and easy-to-use application that can help your team stay on track. It can help you minimize payroll by accurately managing time and compensation.

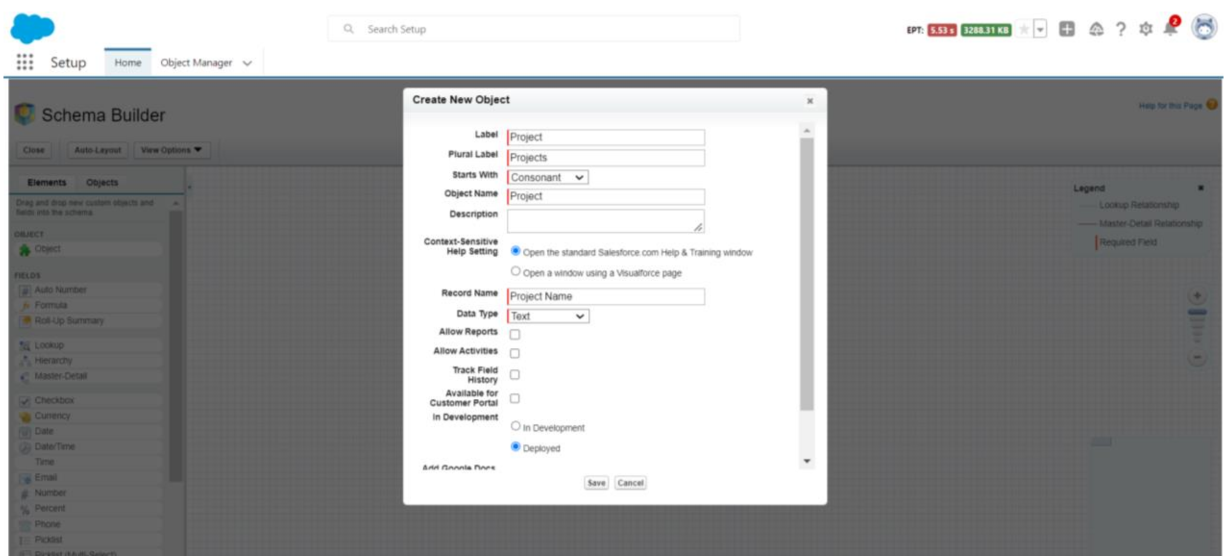
Create Objects and Fields

Search Schema Builder in Quick Find

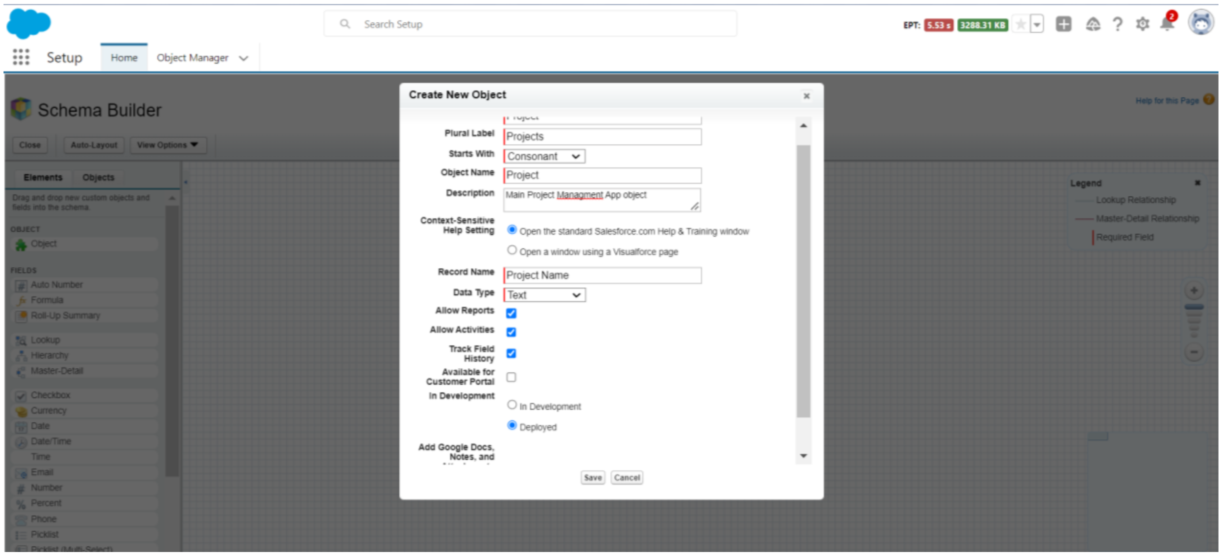


Click Clear all

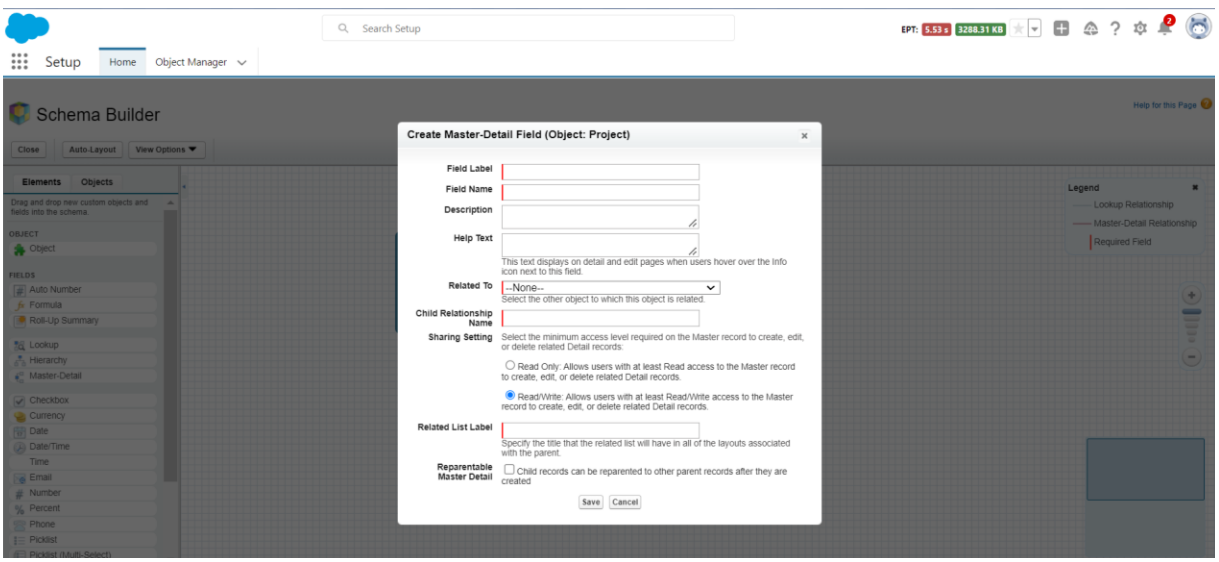
Go to Elements tab -> Create a new object -> label it Project



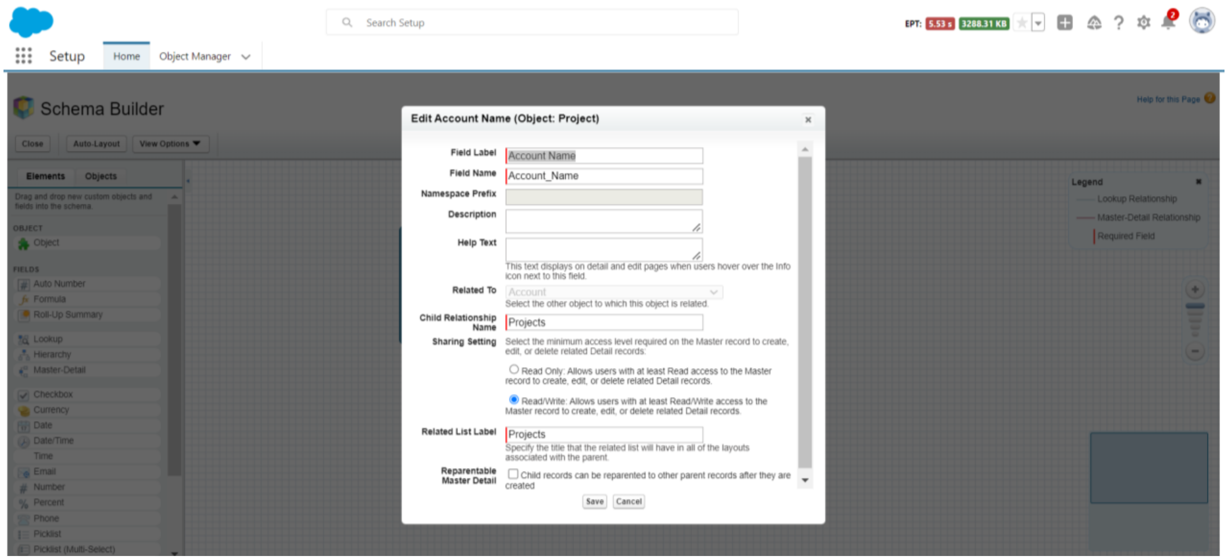
Allow Reports and Activities -> Click Save



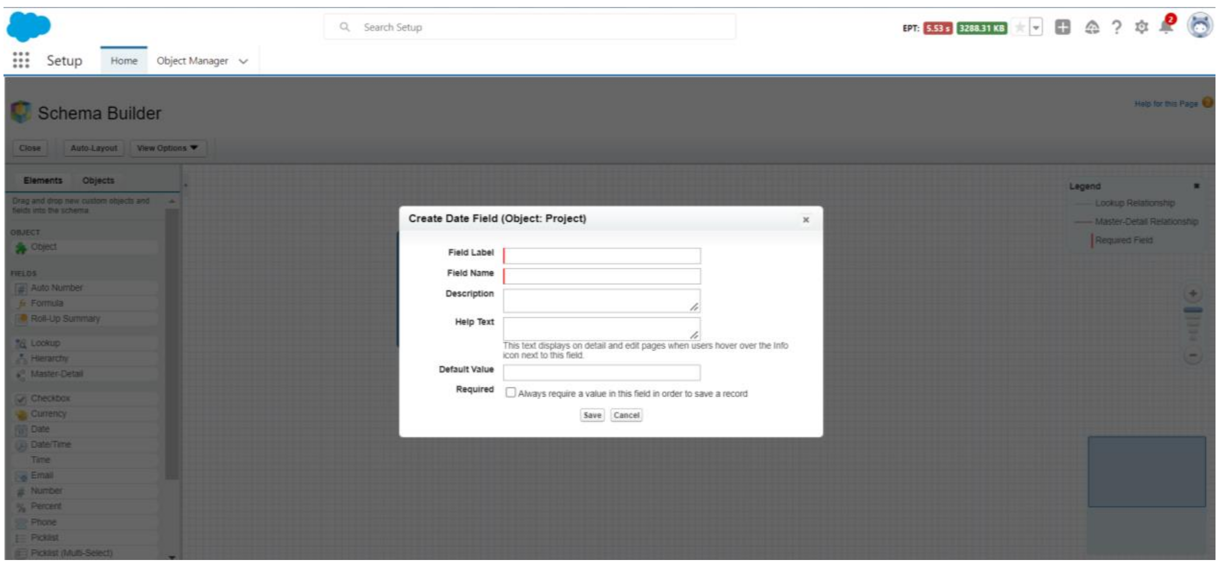
Next add a Master – Detail relationship to the account so that every project will be associated with an account



Fill Account Name -> Related to Accounts (child relationship auto populates to Project) -> Save



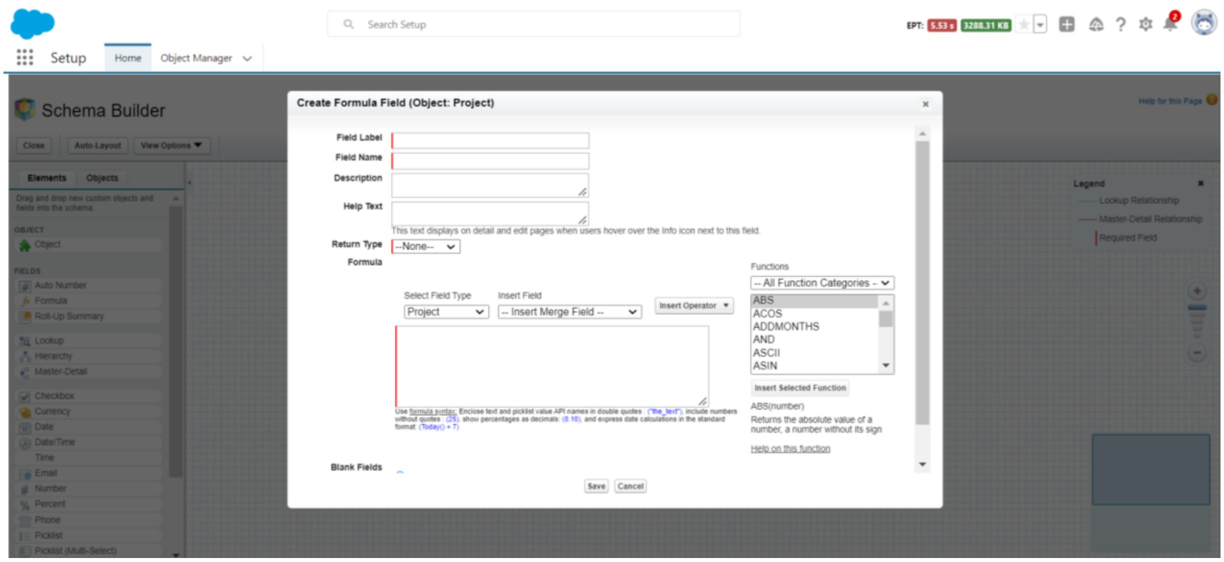
Next create a Date Field -> Drag and drop Date field into the schema builder



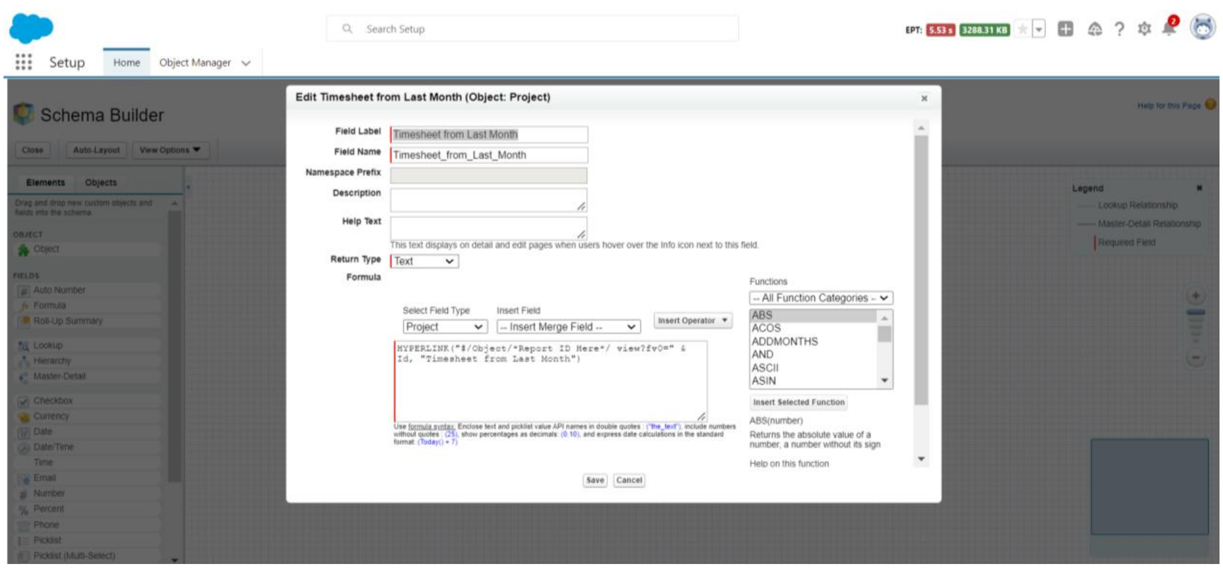
Field Label should be End Date -> click Save

Next Create the Timesheet Object by selecting Formula, this will link to a Timesheet report for the given project.

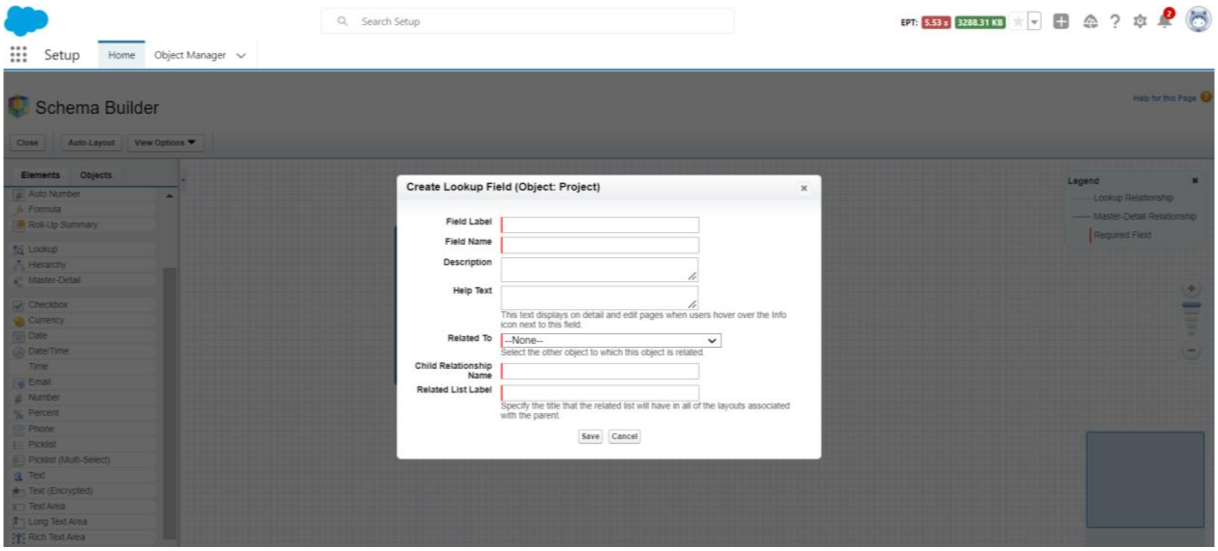
Drag and Drop Formula into the Schema Builder



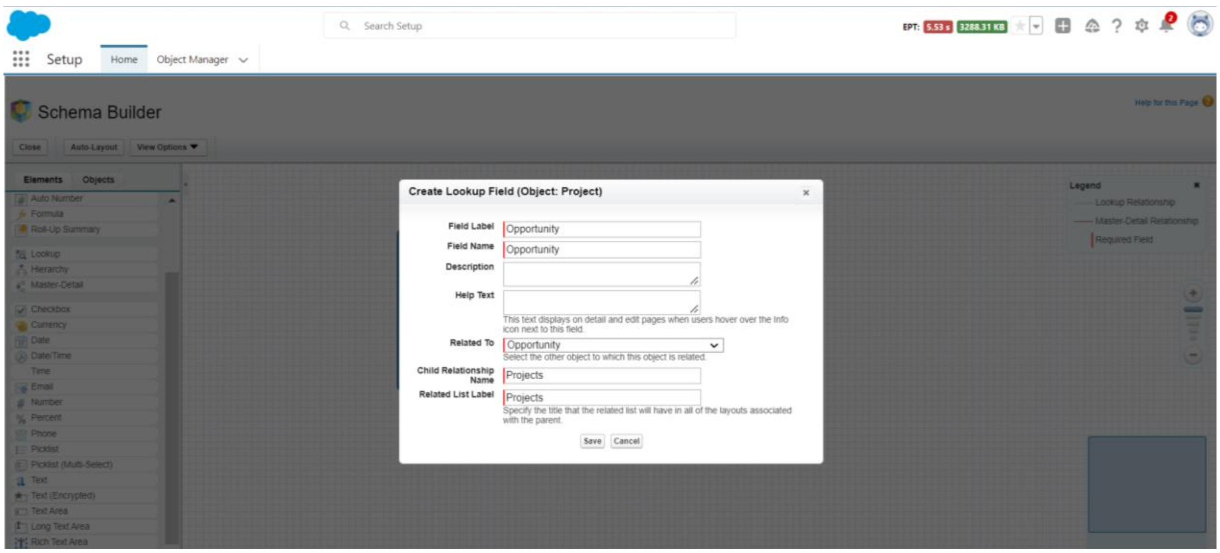
Insert your formula -> select Text for Return Type -> Click Save



Next field is the Opportunity. We want to link our Projects to opportunities. Select Lookup field and drag into schema.

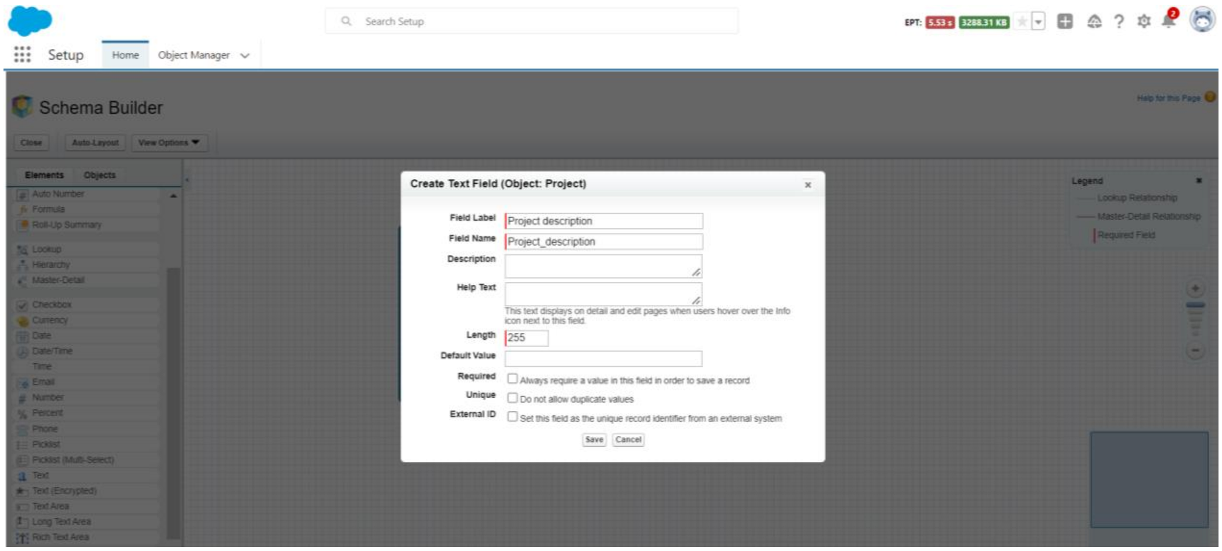


Fill in Opportunity and Relate to Opportunity -> Click Save

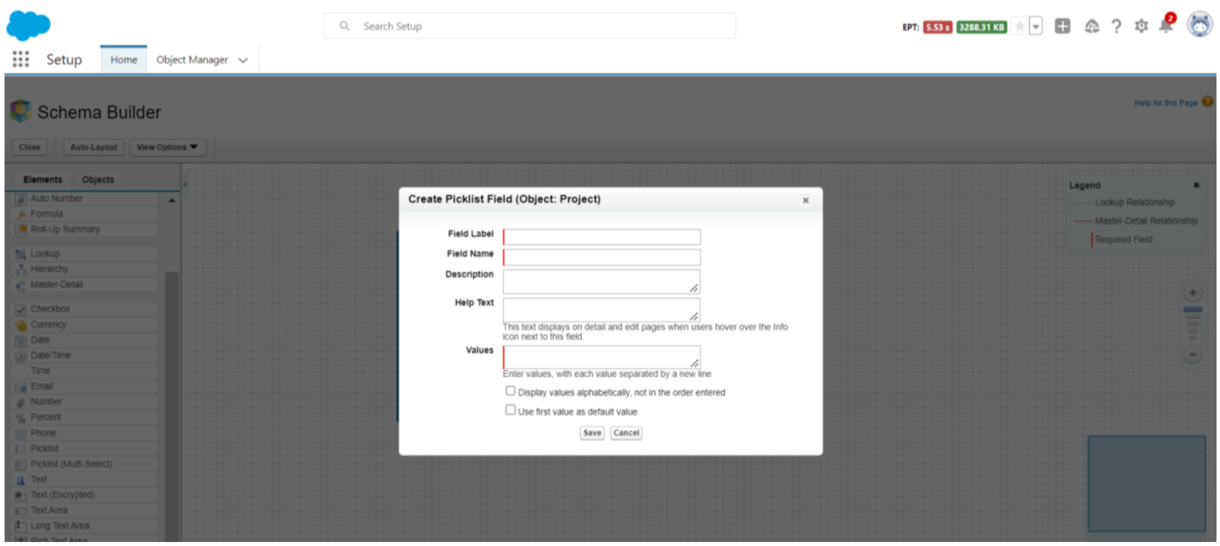


Now add the Project description. Select Text and drag and drop into schema

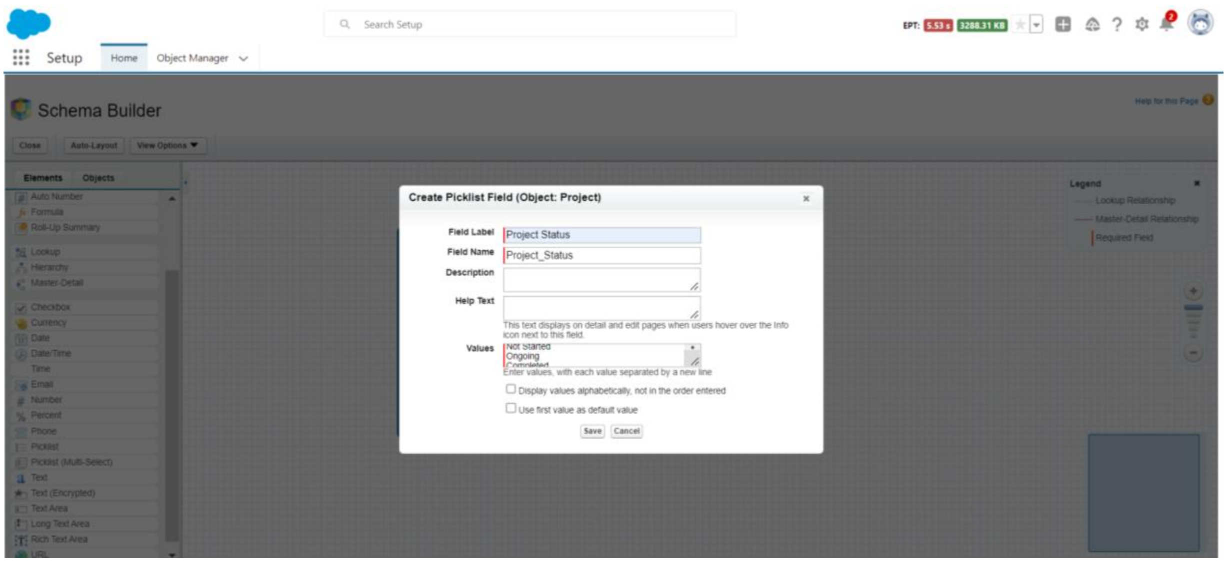
Fill in Project Description as feild Label and make it 255 Characters -> Click save



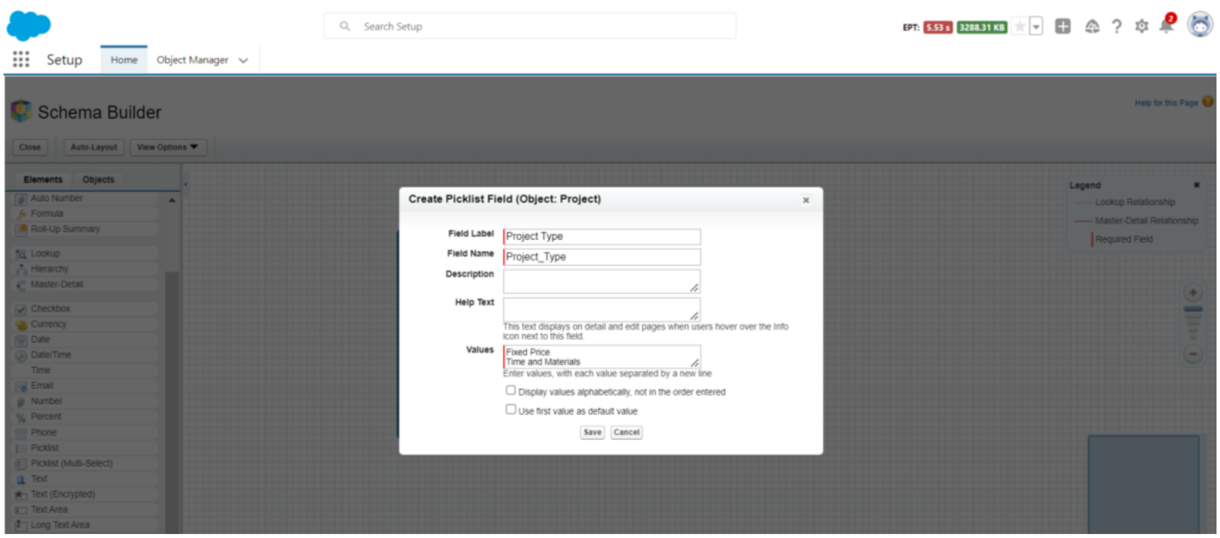
Now create project status which will be a Picklist. Drag and drop Picklist into the schema builder



Make Field Label Project Status and for Values you will have "Not Started", "Ongoing", and "Complete".



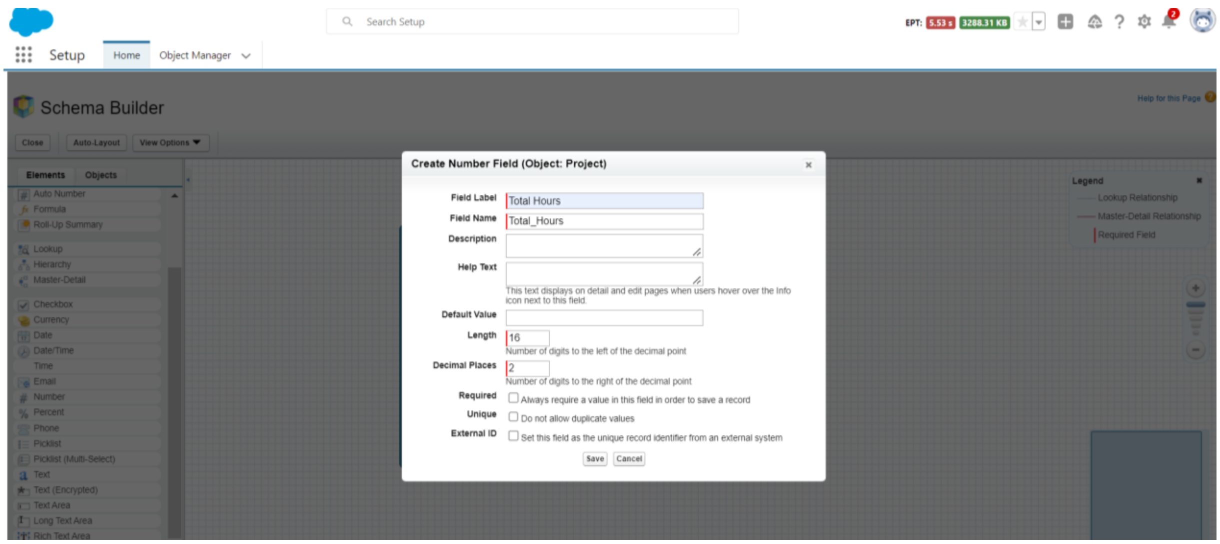
Create a Project Type by dragging and dropping Picklist into Schema Builder -> Insert values necessary for your org and Save



Start Date is a Date Field so drag and drop int schema builder Fill in Start Date and click Save

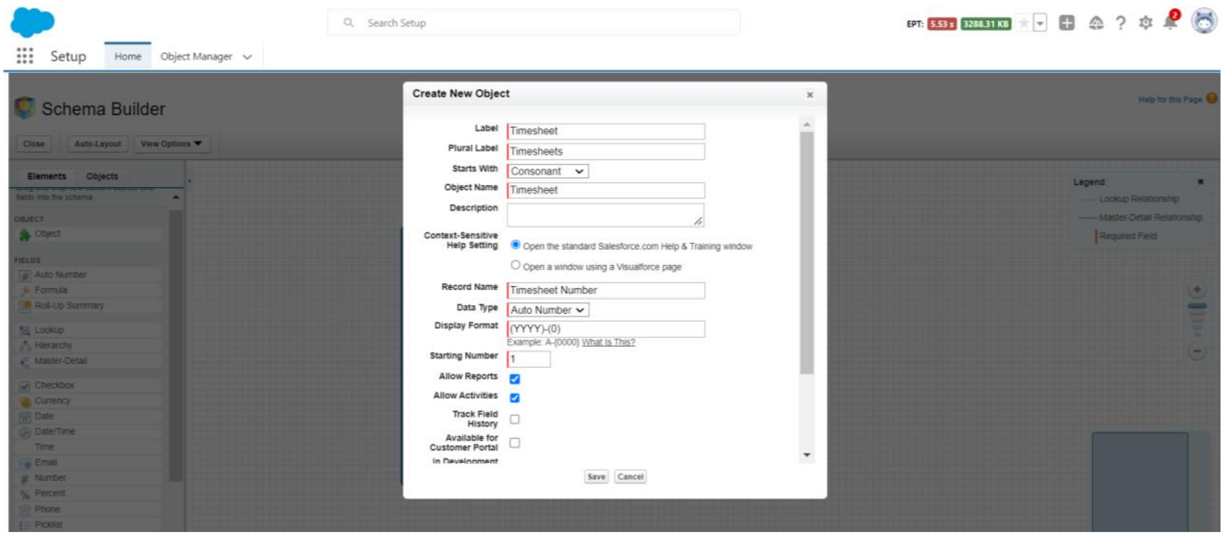
Total Hours is a number Field so drag and drop Number into schema builder

Make it a length of 16 with 2 decimals -> Click Save


Setup
Home
Object Manager
Search Setup
Schema Builder
Close
Auto-Layout
View Options
Elements
Objects
Create Number Field (Object: Project)
Field Label
Total Hours
Field Name
Total_Hours
Description
Help Text
This text displays on detail and edit pages when users hover over the Info icon next to this field.
Default Value
Length
16
Number of digits to the left of the decimal point
Decimal Places
2
Number of digits to the right of the decimal point
Required
Always require a value in this field in order to save a record
Unique
Do not allow duplicate values
External ID
Set this field as the unique record identifier from an external system
Save
Cancel
Legend
Lookup Relationship
Master-Detail Relationship
Required Field

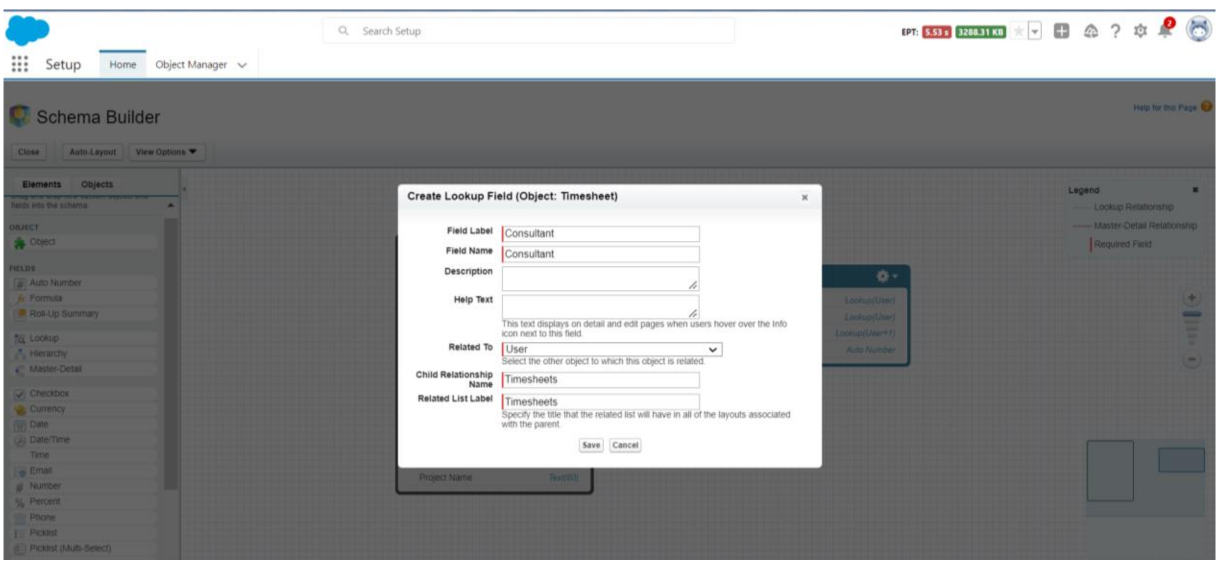
Create a new Object

Label it Timesheet-> Change Record name to Timesheet Number -> Set Data Type as Auto Number -> Allow Reports, Allow Activities -> Set Display Format to {YYYY}-{0} -> Click Save



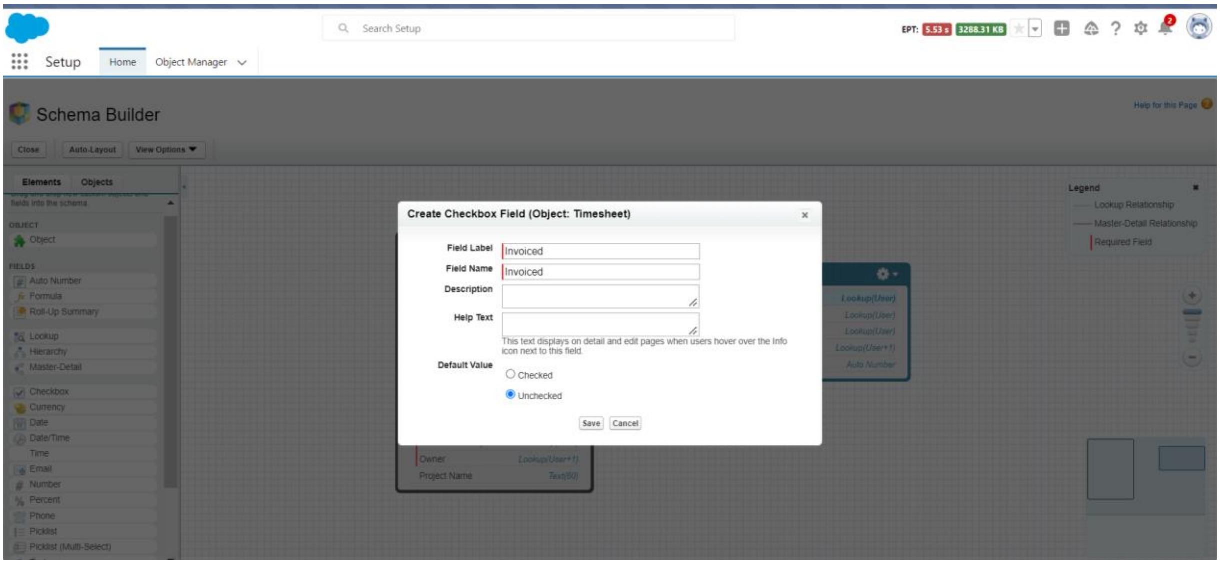
Now Create a Lookup field by dragging and dropping Lookup Field into the new Object

Label it Consultant and relate it to the User Table -> Click Save

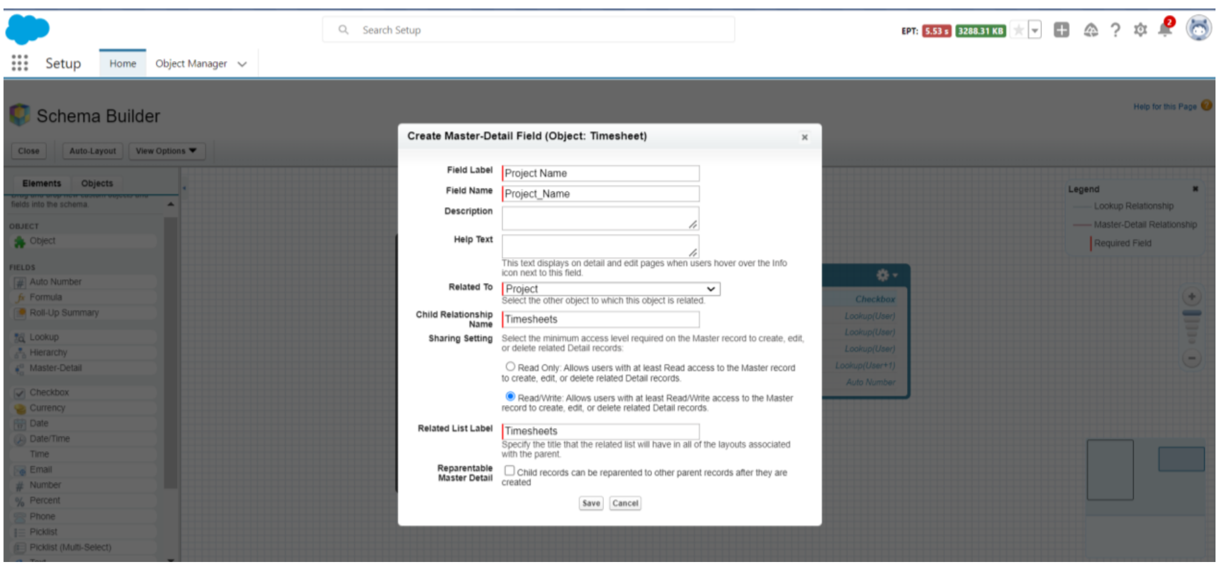


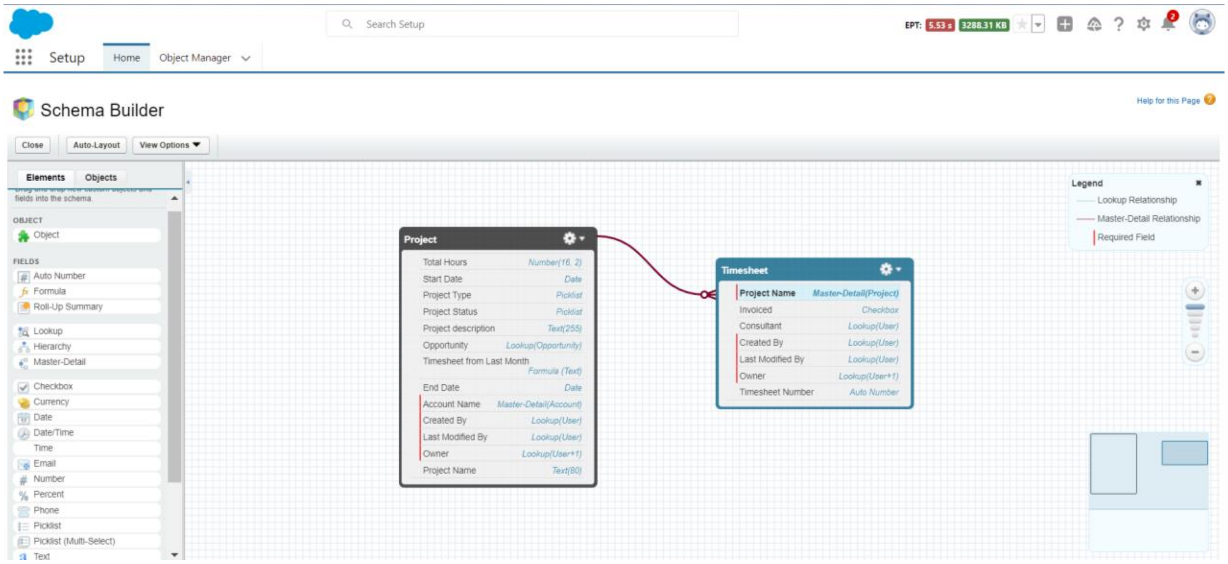
Now to denote whether a particular timesheet line item has been invoiced create a checkbox field.

Drag and drop Checkbox into the new object field -> Label it Invoiced -> leave it Unchecked -> Click Save

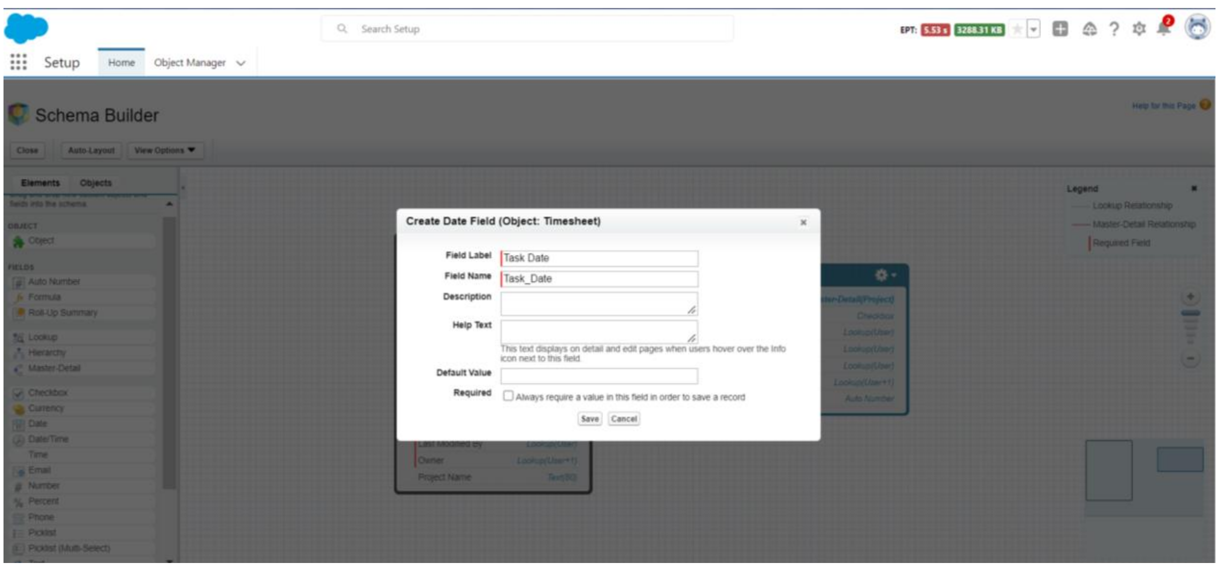


Now we want to relate it to the Project Object. Create a Master Detail Relationship by dragging and dropping into the new Object -> Label It Project Name and Project which will auto populate the parent child relationship to Timesheets -> Click Save

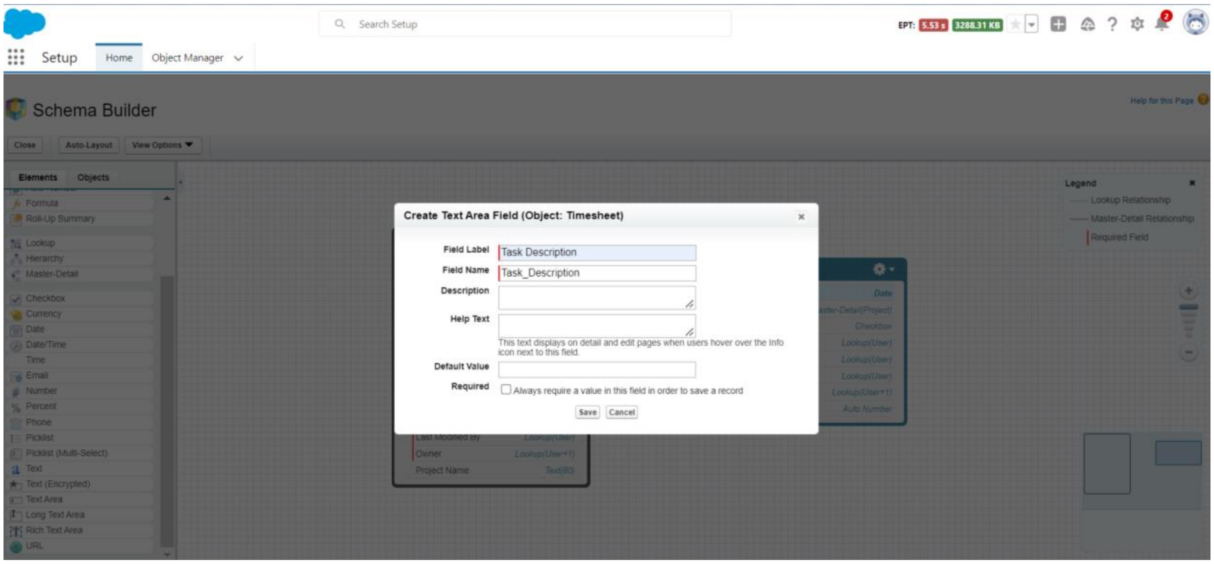




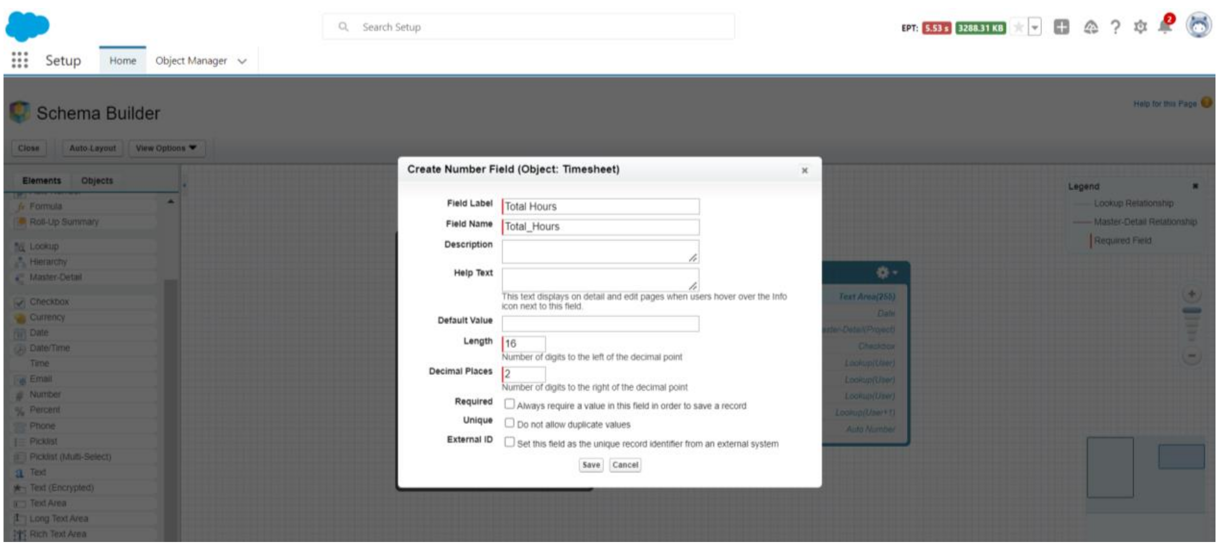
Now we want to add a date field to track what day the Timesheet was written for Label it Task Date



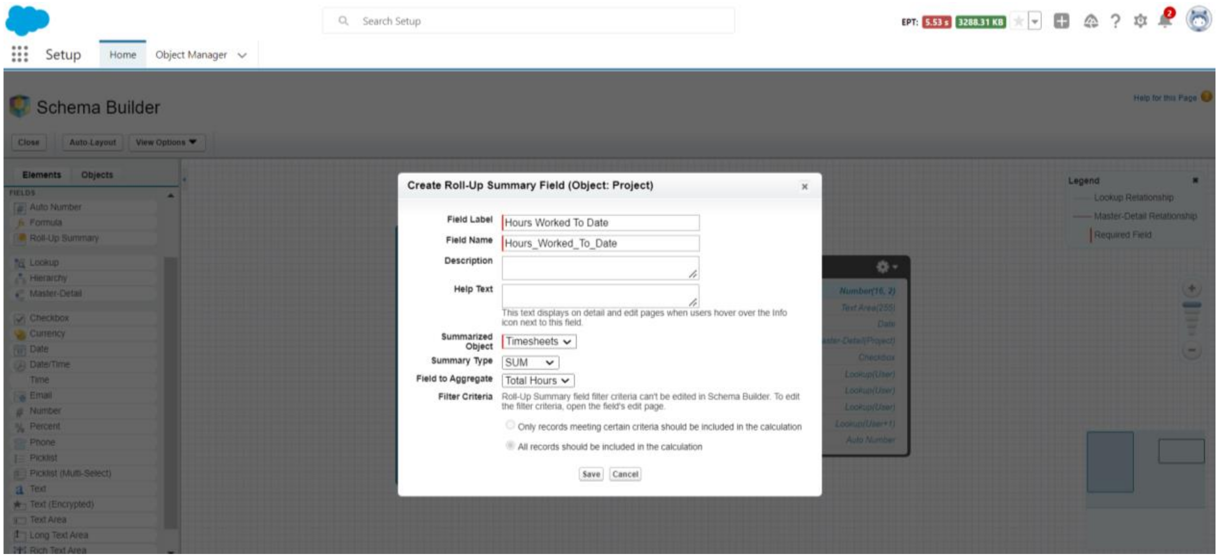
We want to add a Description field to describe what kind of work we have done. Add a Text Area -> label it Task Description -> Click Save



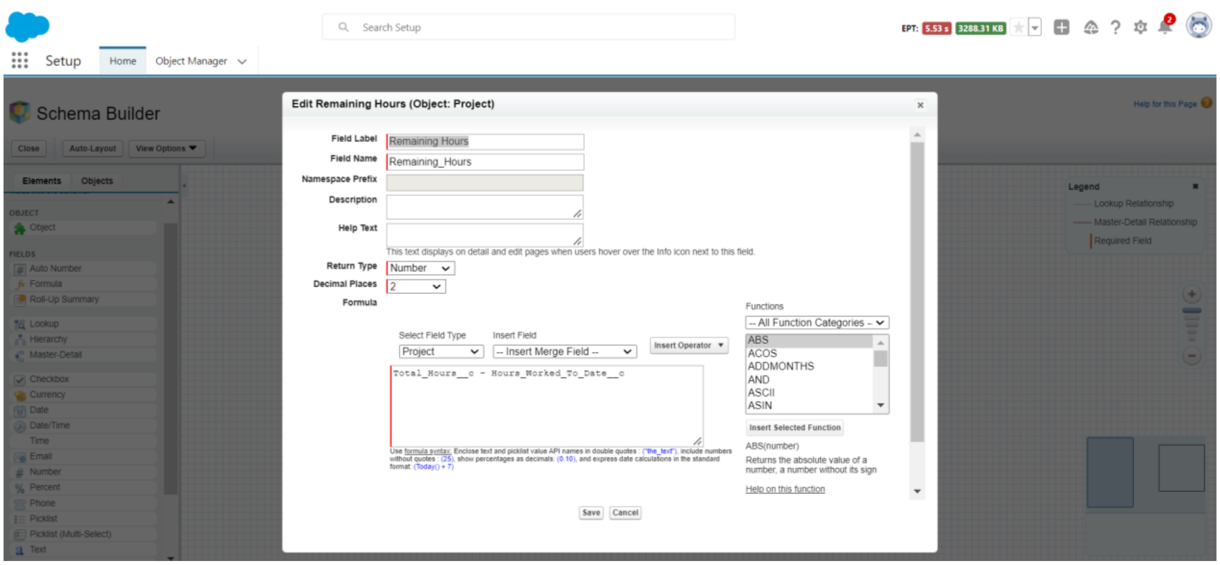
Lastly total Hours for a given line item is going to be a Number



Now for our Project Object we want to create an Hours Worked to date roll-up summary field. Drag and Drop Roll-up Summary field into Project -> Label it Hours Worked To Date -> Use timesheet Object in Summarized Object -> SUM for Summary Type -> Total Hours for Field to Aggregate

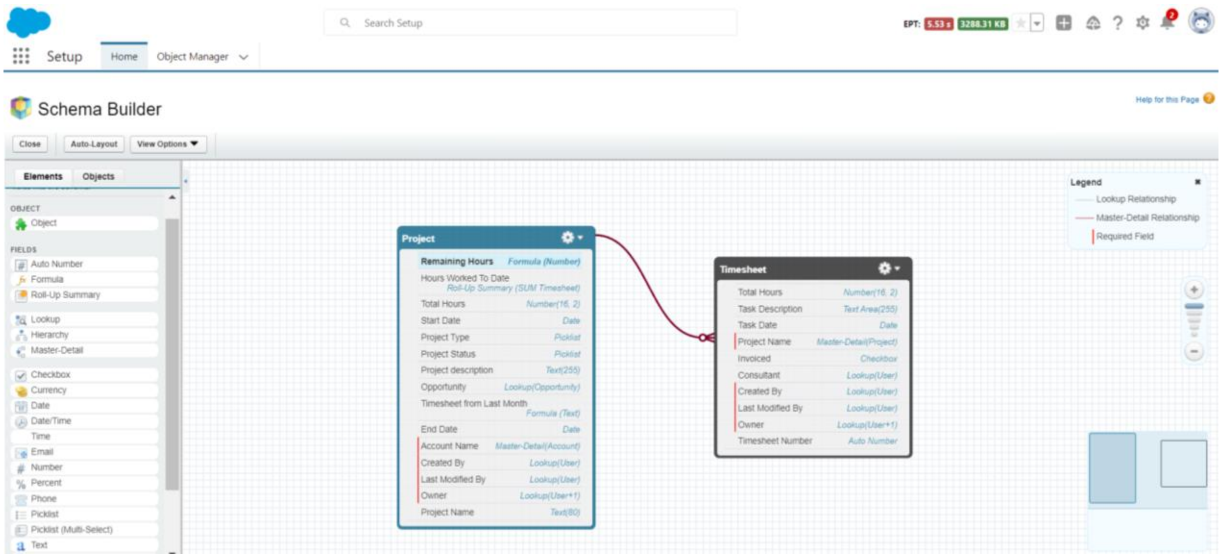


Lastly we need a Formula for Remaining hours which will be Remaining Hours -> Return type Number -> 2 decimal places -> Formula is Total_Hours__c - Hours_Worked_To_Date__c -> Click Save.

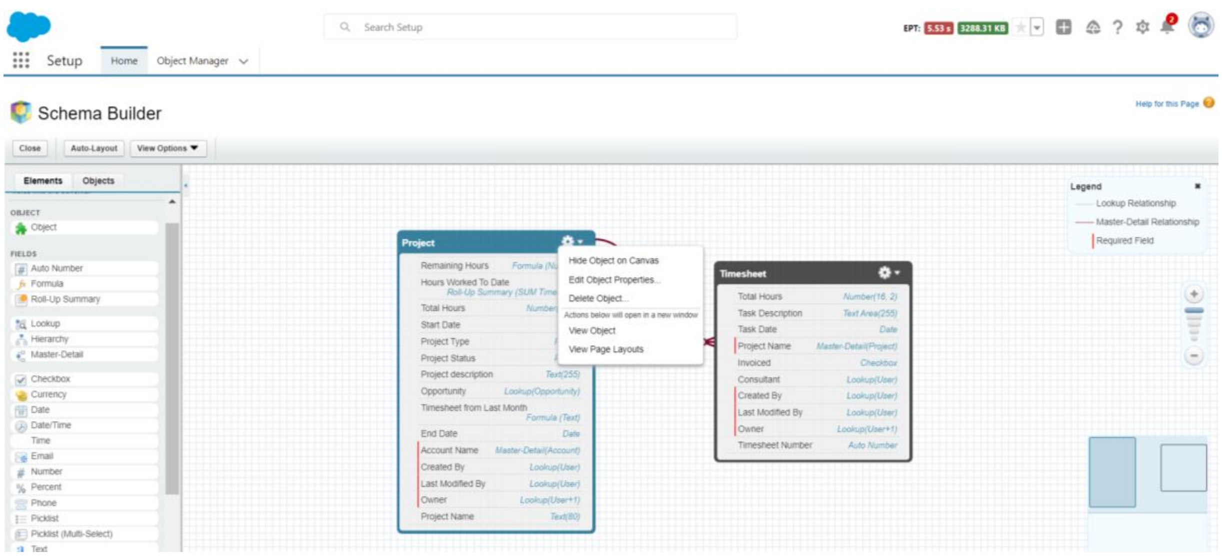


The Schema Is done now we edit our layout.

Edit Object Page Layout



From the project Object -> Click the Drop down and go to Object -> Click Page Layouts -> Project layouts



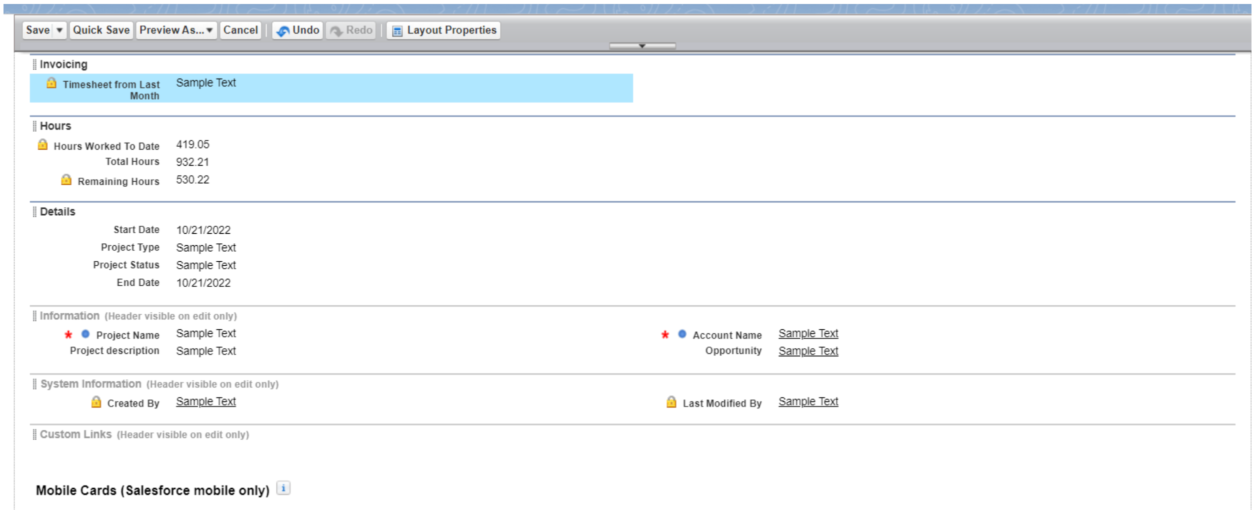
In Project Layout move elements around to your liking -> Add Project Description under Project Detail -> Add Opportunity under Project Detail.

Add a Section, label it "Detail" leave everything else default, add Project type, Start Date & End Date and Project Status.

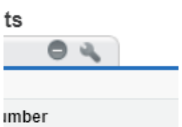
Drop in another Section call it "Hours", inside of hours we want to add Total Hours, Hours Worked To Date and Remaining Hours.

Drop in another section call it "Invoicing", add Timesheets from last month.

Under Related Lists add Timesheets and Click Save.

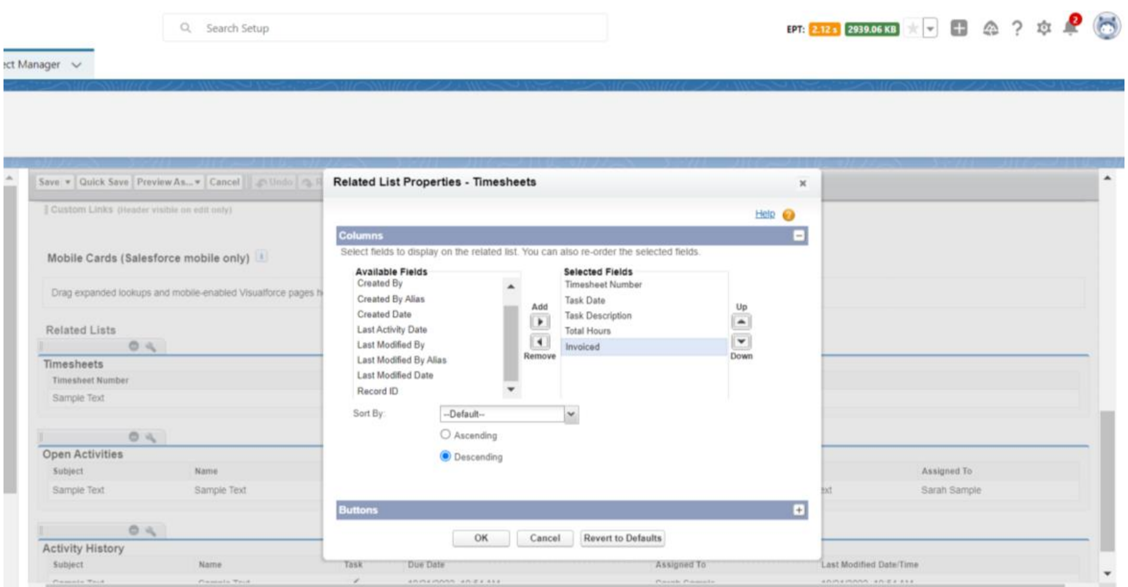


Now edit your related lists to include more relevant information for Timesheets by clicking the wrench icon

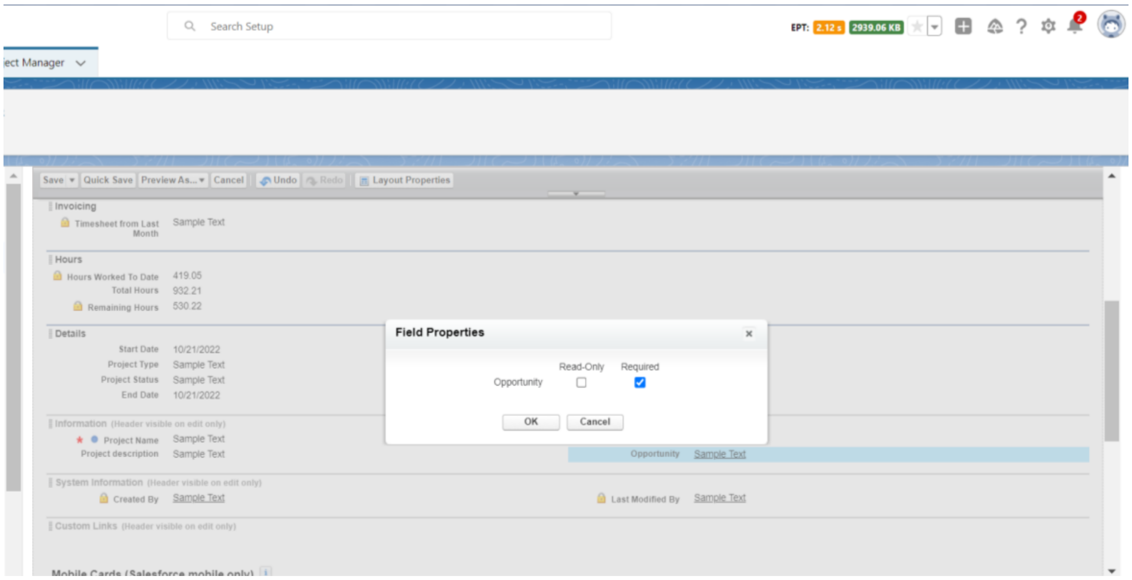


Add Task Date as the First Column , Task Description as second Column, Total hours as third column, Whether its been invoiced and Timesheet Number

Default in descending order

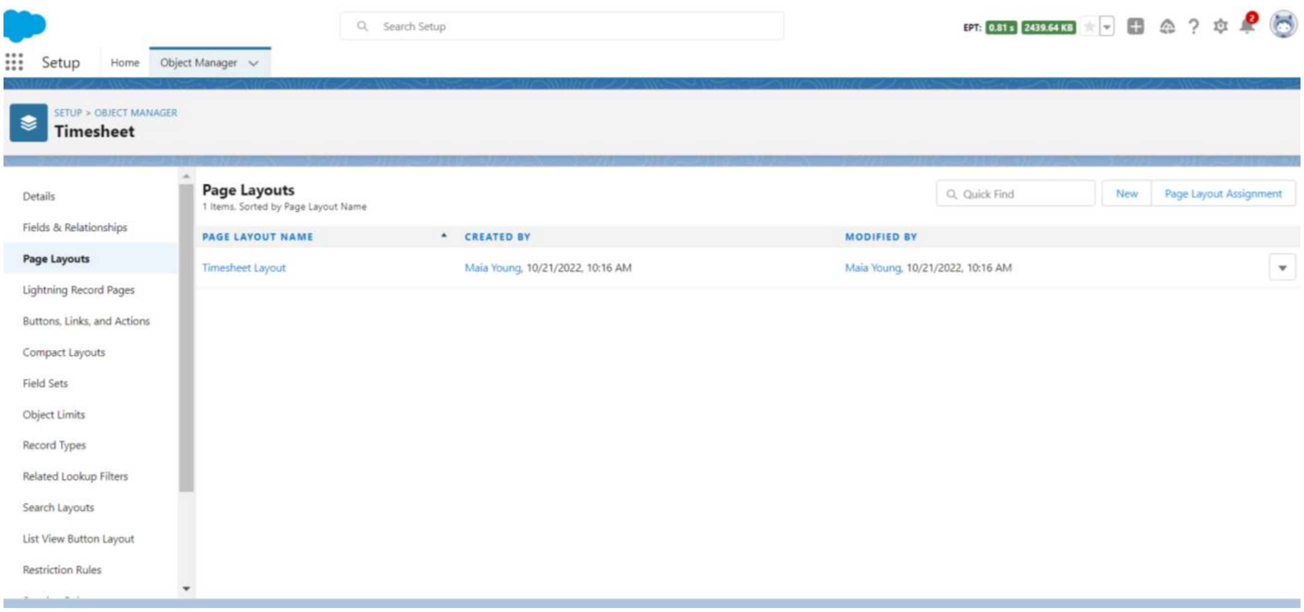


Next Make Opportunity a required Field -> Click on wrench icon near Opportunity -> Select Required

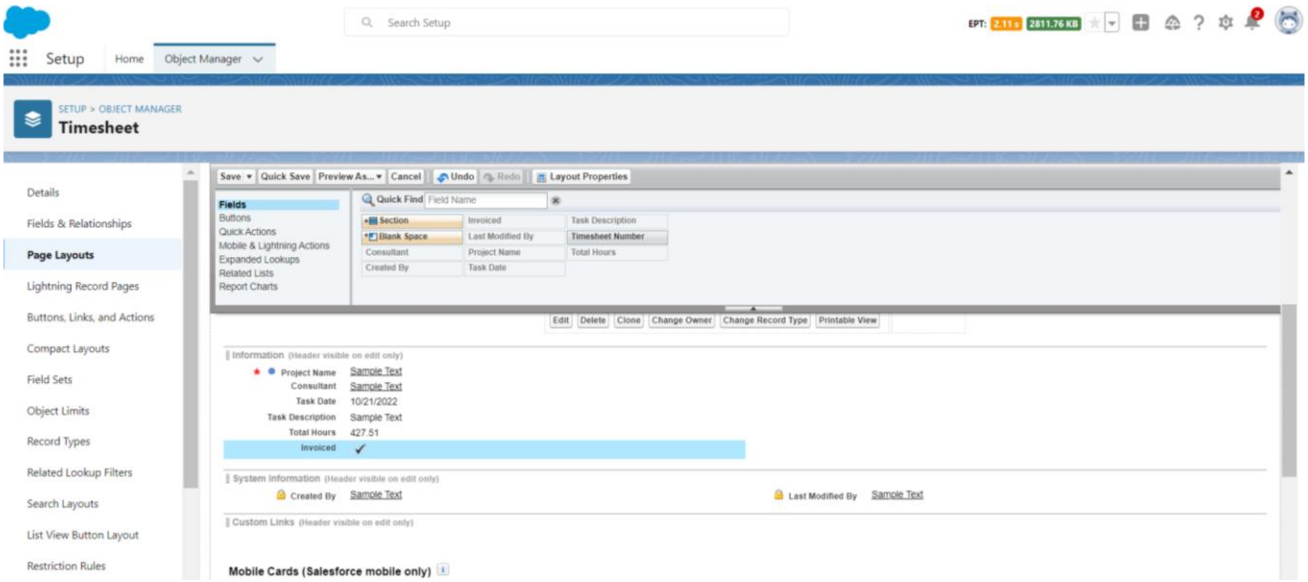


Click Save

Go back to Object Manager and go to Timesheet Object -> Click Page Layouts



Remove Timesheet Number -> Add Project Name, Consultant, Task Date, Task Description, Total Hours, and Invoiced -> Click Save



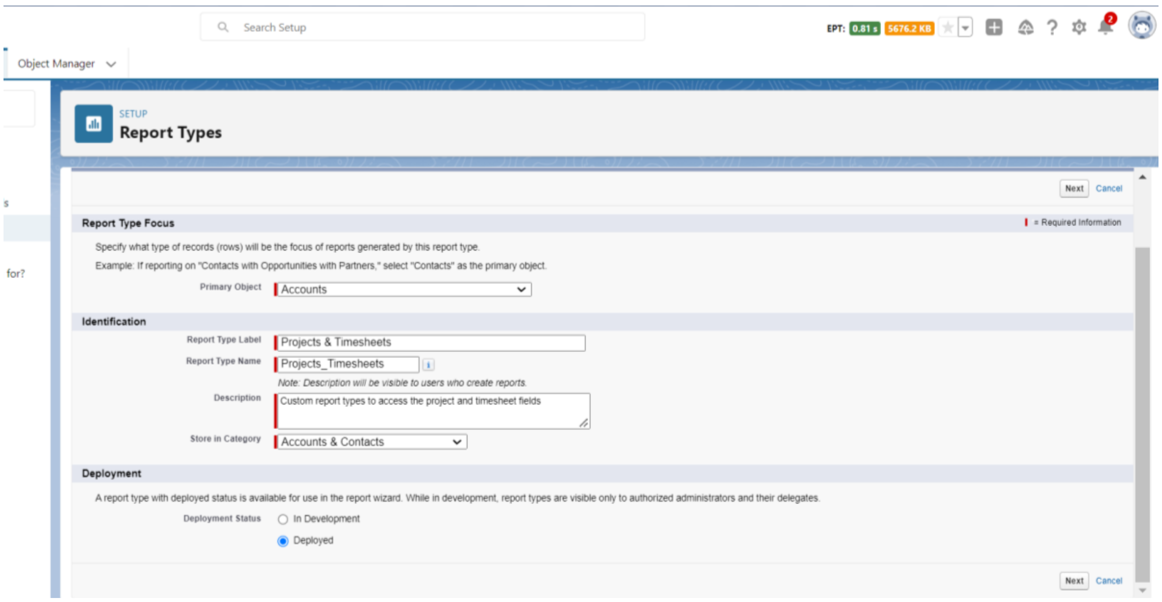
Now lets work on the report that will display the timesheet line items

Create A Report Type

Go to Quick find and type in Report Types

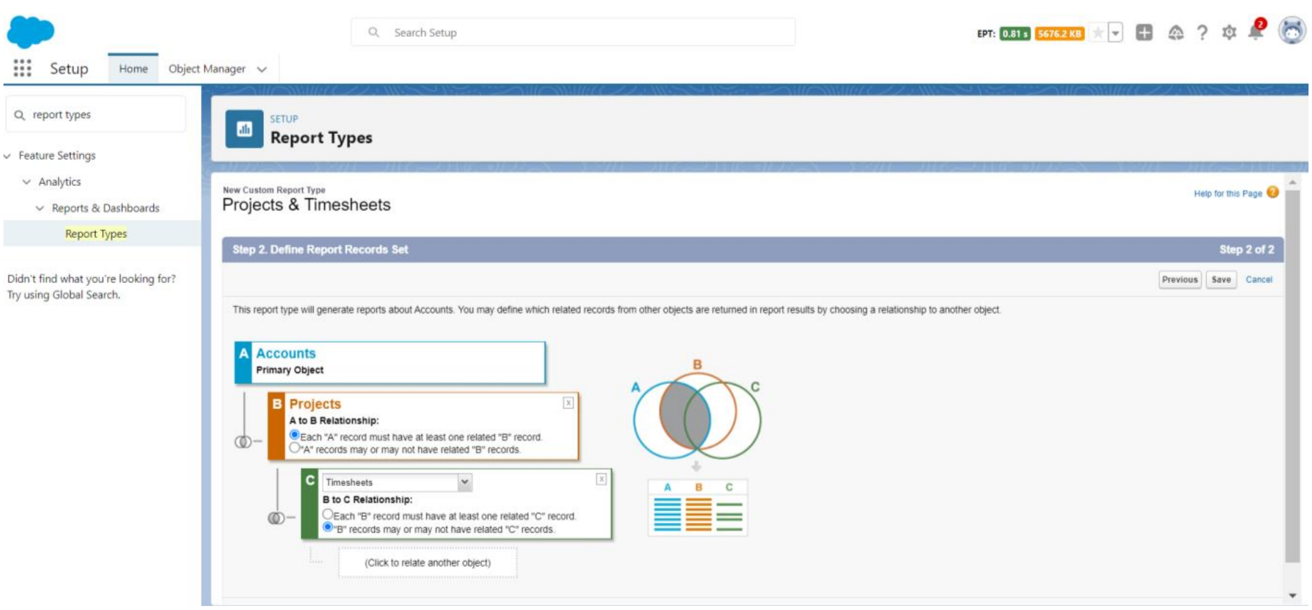
Click New Report Types

Primary Objects will be Accounts, Report Type Labe will Be Projects and Timesheets, Description is Custom report type to access the project and timesheet fields, Store in category will be Accounts and Contacts Group, Mark it as Deployed. -> Click Next



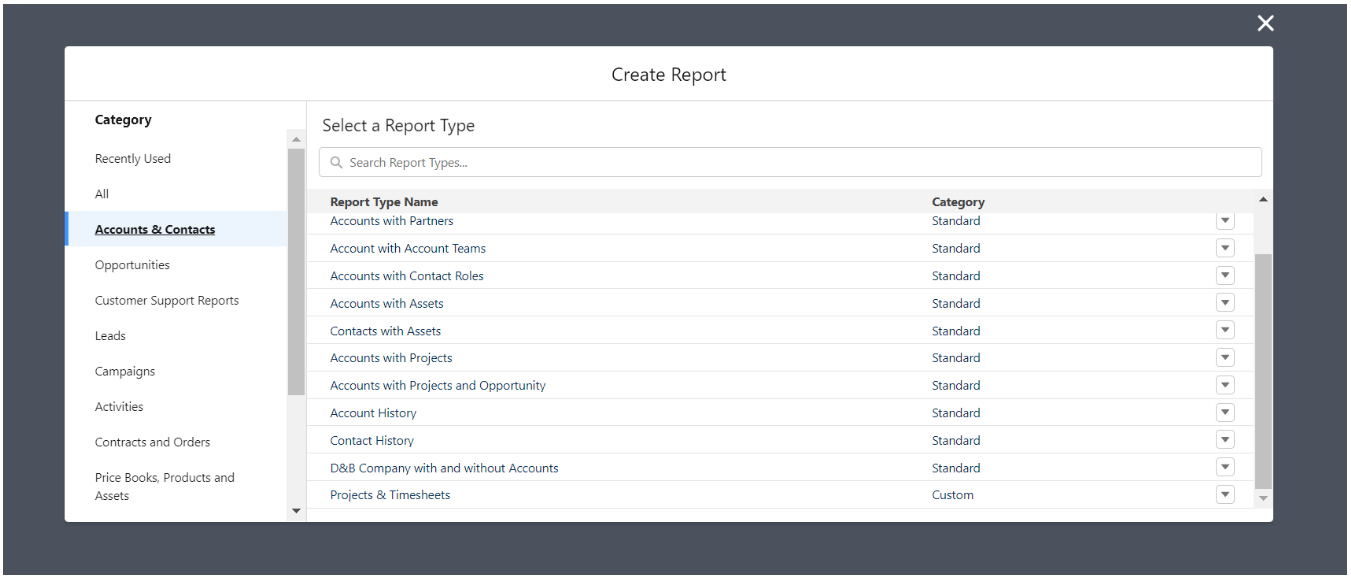
Next Account will relate to Projects, and the Projects will relate to the timesheets.

Projects will Report on any account which has projects so select the first radio button. Select the second radio button under Timesheets to report whether the are timesheets or not. -> Click Save

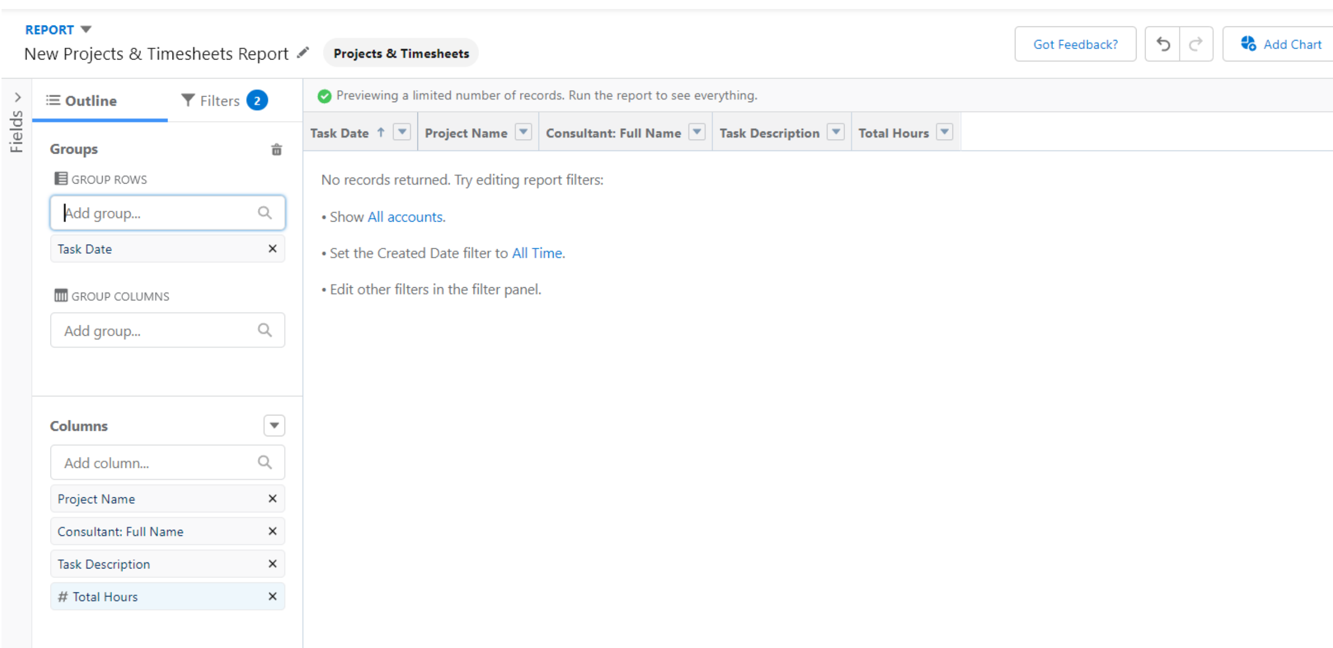


Create A Report

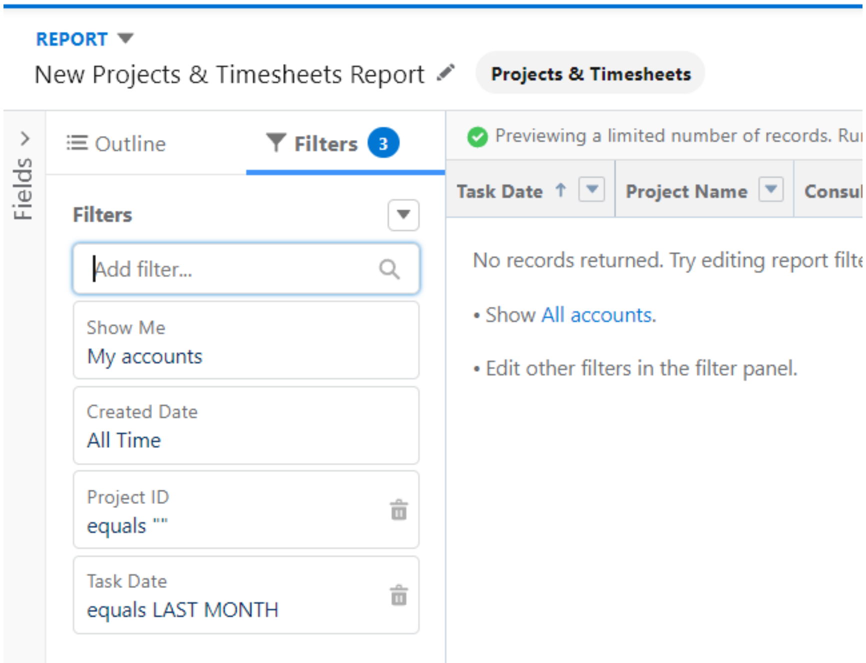
Go to Sales App and Select New Report -> Lick Account and Contacts -> Projects and Timesheets



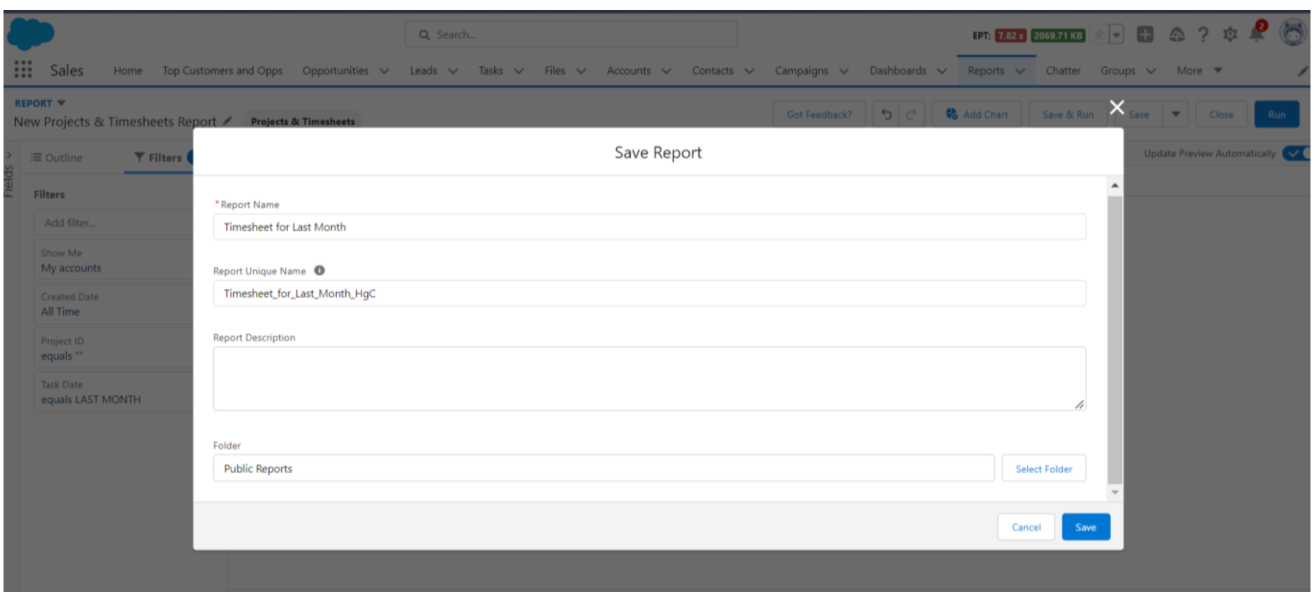
Under Columns on the left panel remove Account Name and Timesheet Number, add Consultant Name, Add Task Description and Timesheet total hours. Next Group Columns by Task Date

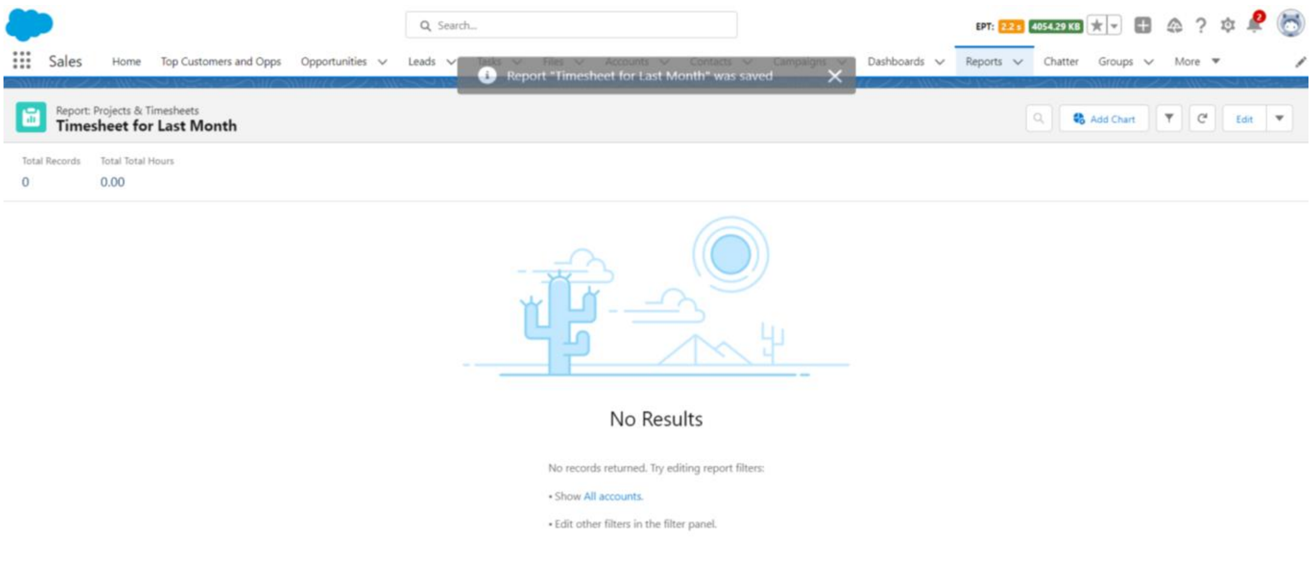


Now go to Filters and Show All Accounts, Created Date Show All Time, Project ID equals "" (a blank value), add Task Date Relative date "Last Month"-> Apply -> Save as Timesheet for Last Month



Make Public so anyone can access it -> Click Save





Sharing Settings

Go to setup and type Sharing Settings in Quick Find Box

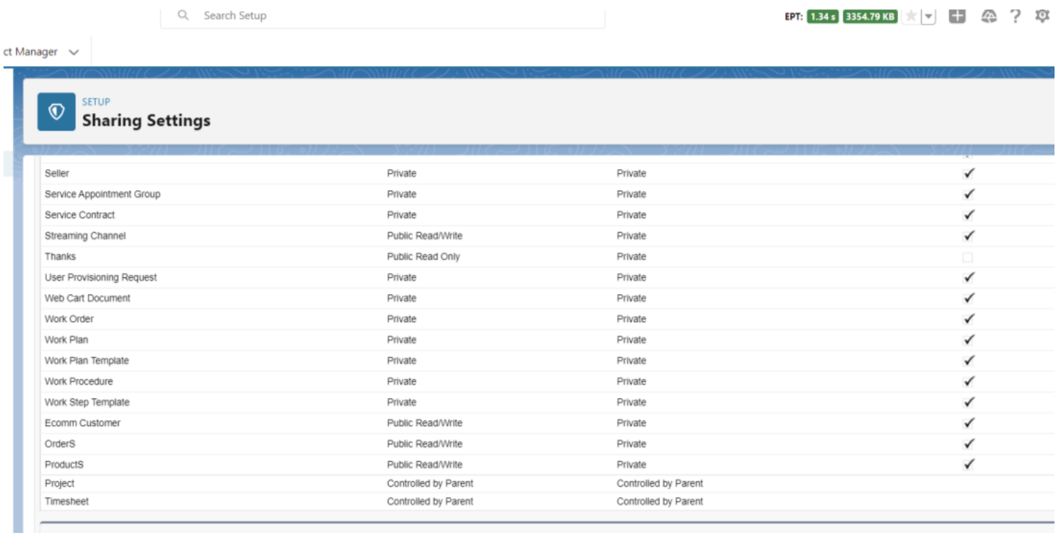
Make sure Account object sharing setting is set to “Public/Read/Write”

Default Sharing Settings

Organization-Wide Defaults

Object	Default Internal Access	Default External Access	Grant Access Using Hierarc
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓

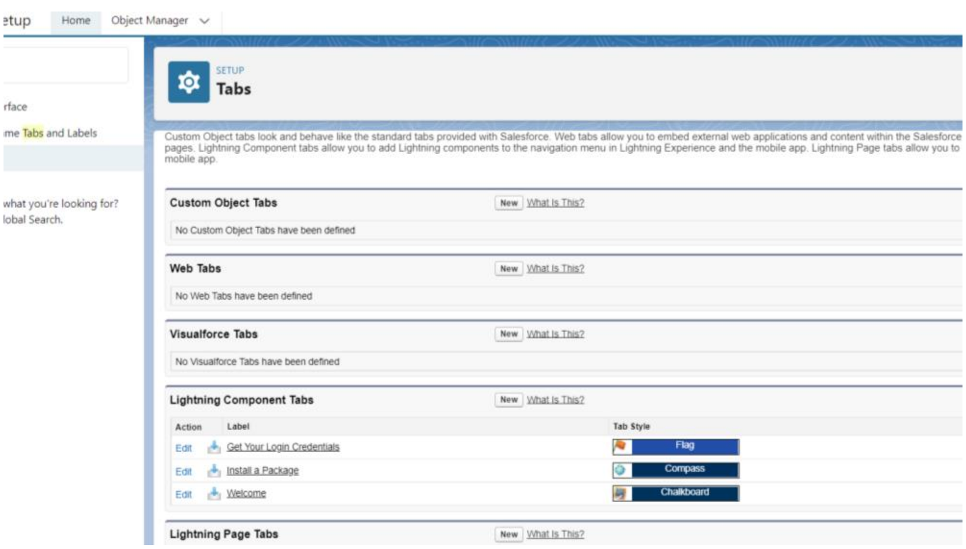
Next, check Project and Timesheet object and make sure it is set to “Controlled by Parent”



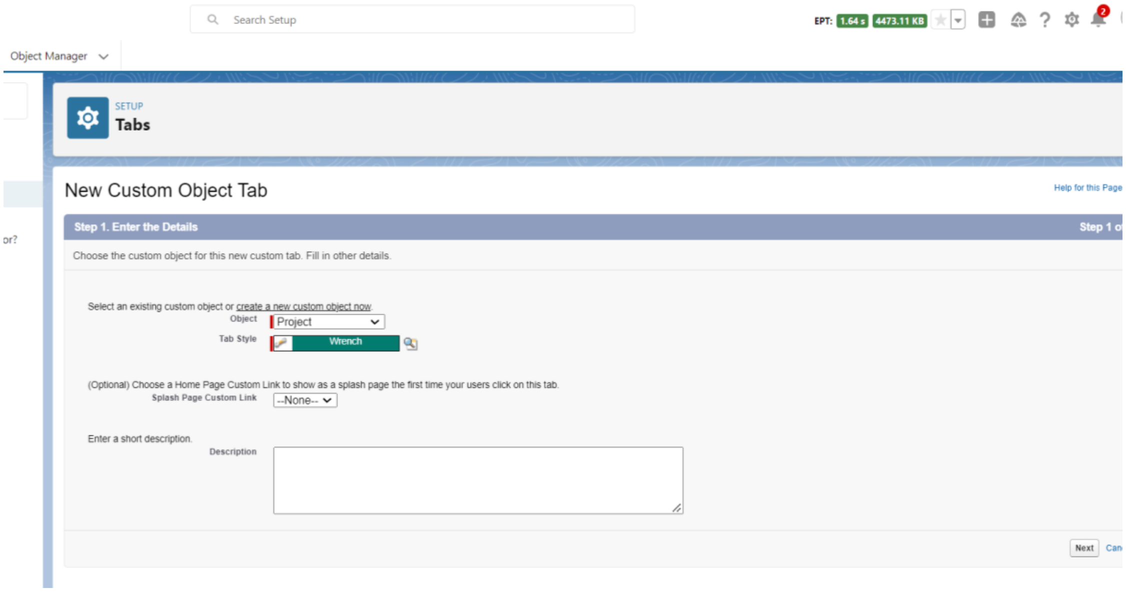
Now let's create our Tabs so we can access our objects

Search tabs in quick find and select

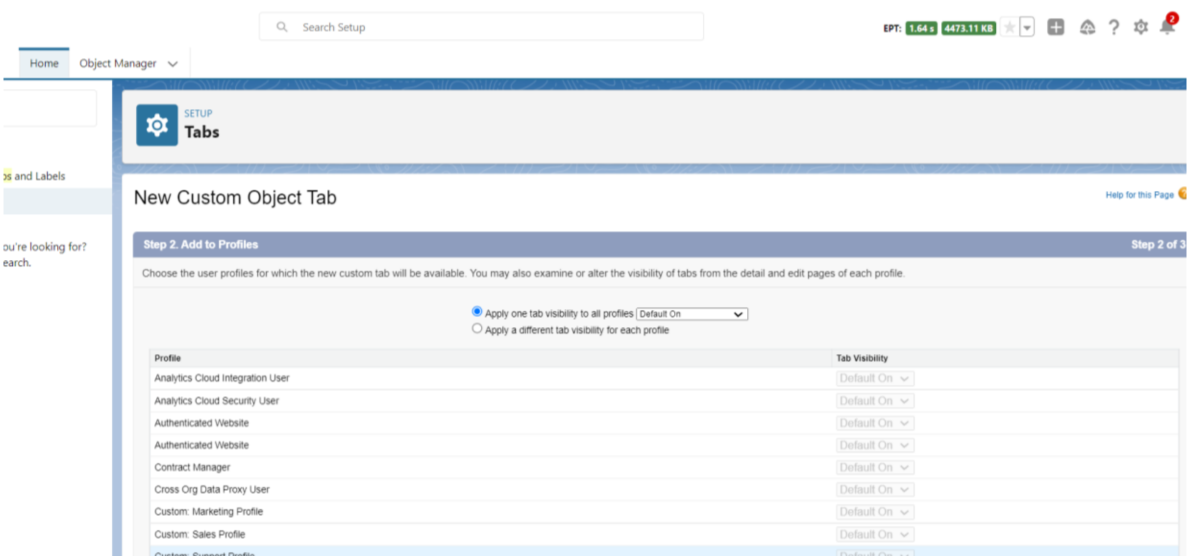
Under Custom objects Tabs select Create New



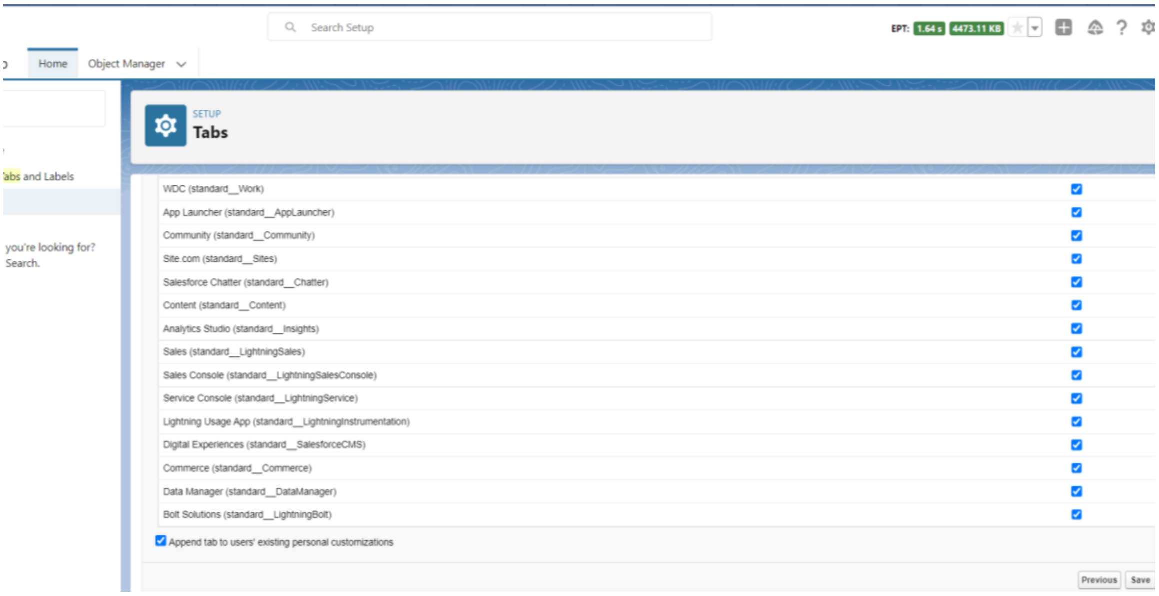
Select Project as object and give it a tab style of your choosing -> Click Next



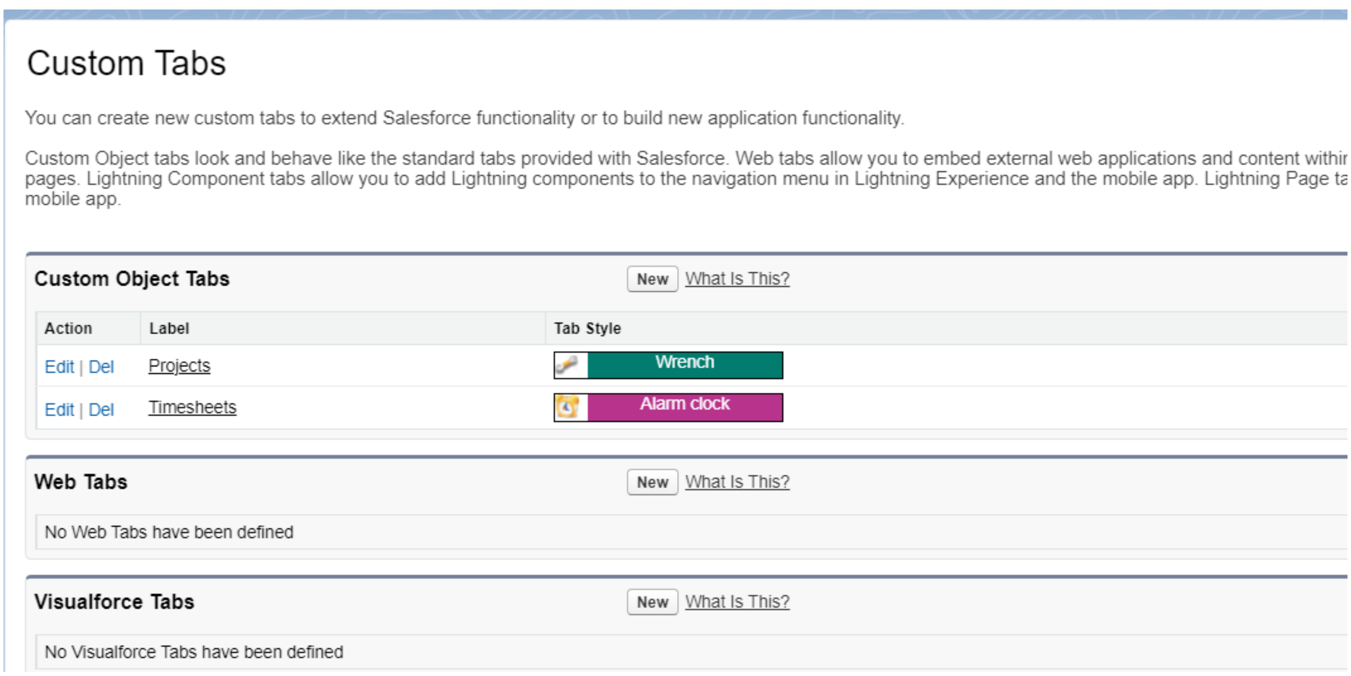
Default on for all profiles -> Click Next



Include in All apps -> Click Save



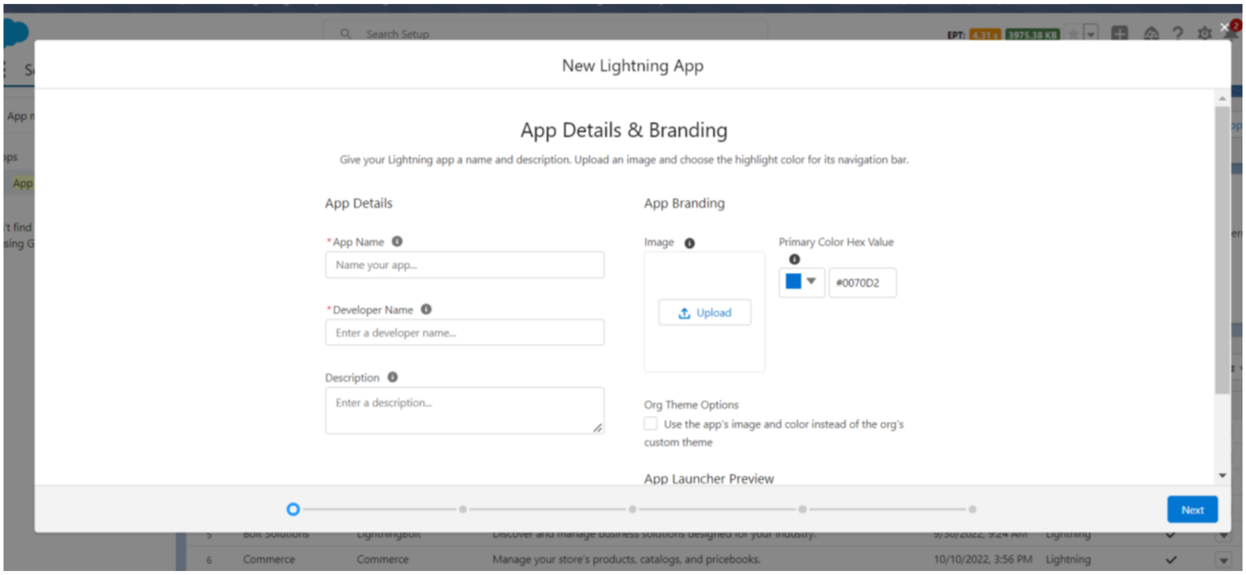
Do the same for the Timesheet object



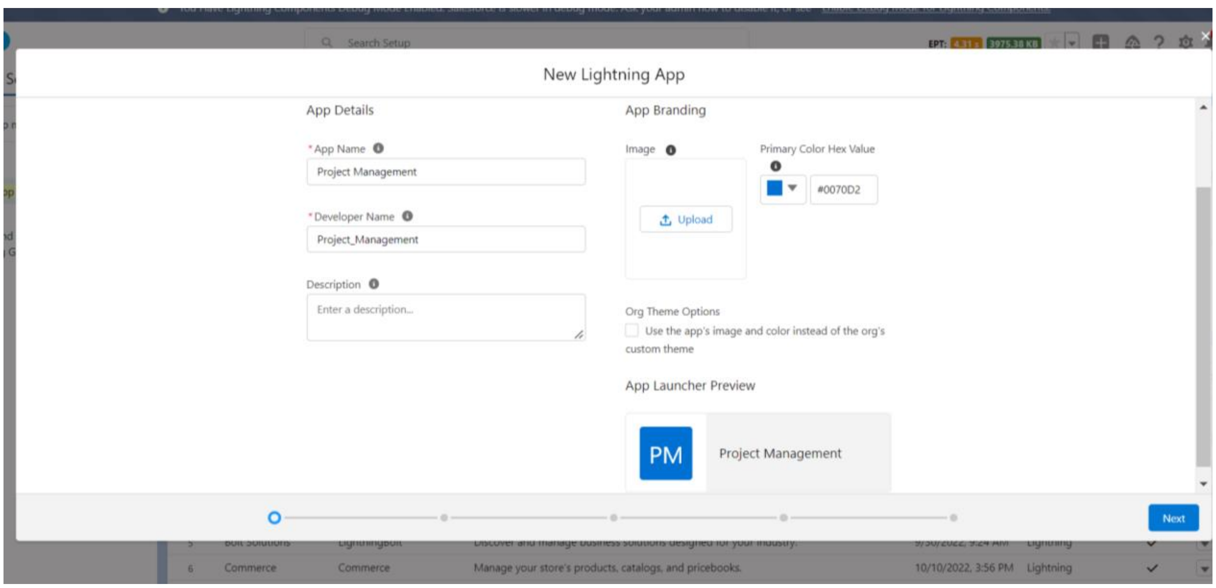
Next lets create an App to tie it all together

Create a Lightning App

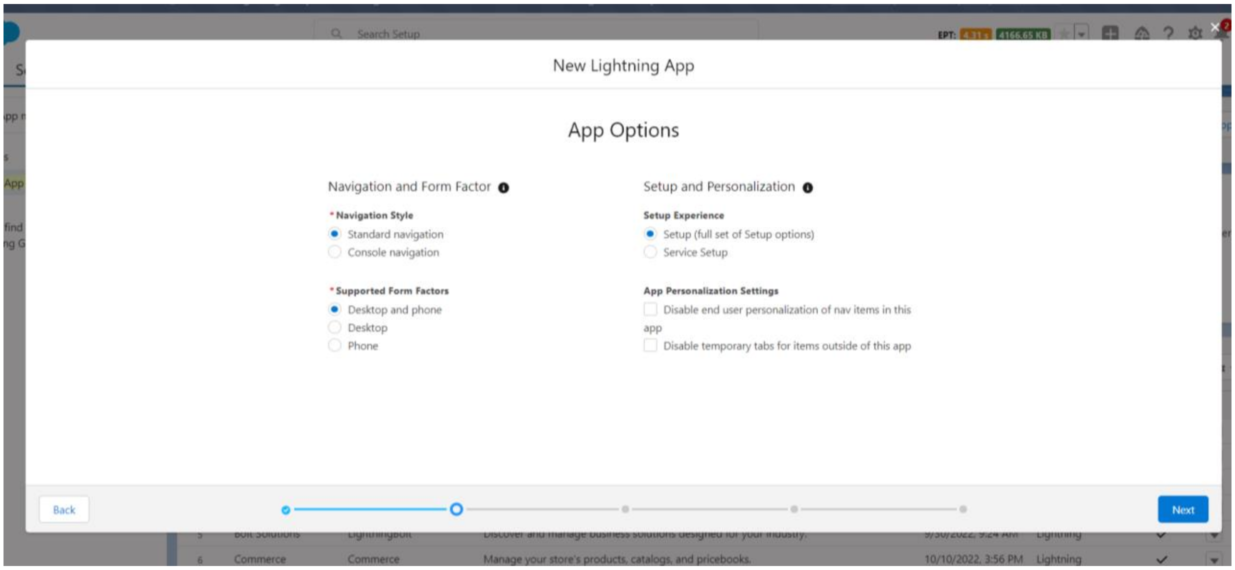
Go to the App Manager -> New Lightning App



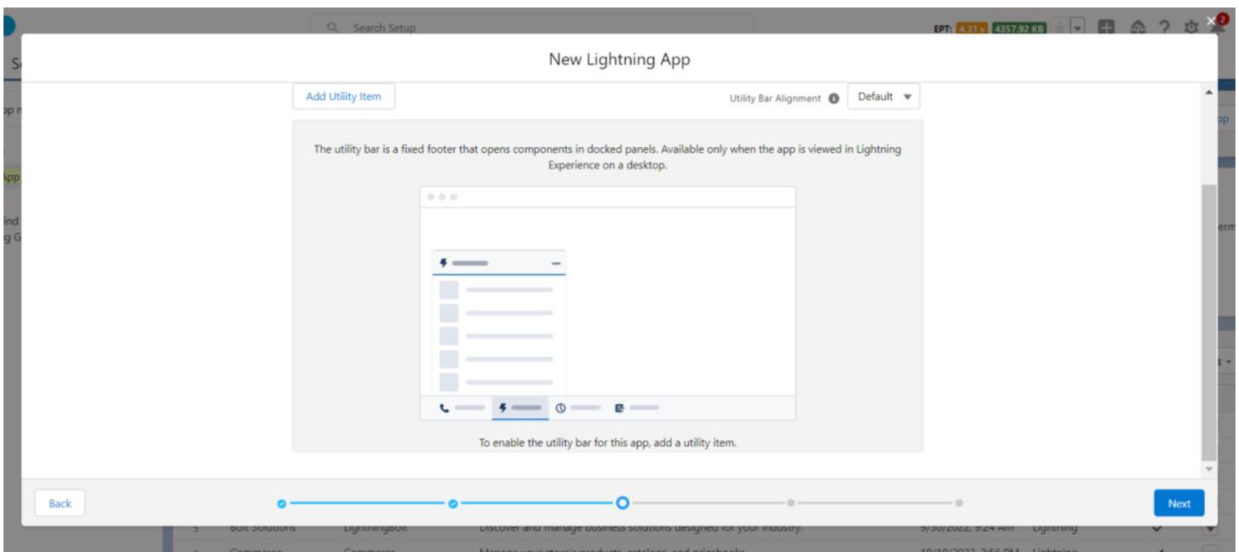
Label the app Project management and customize the Apps Branding if you like -> Click Next



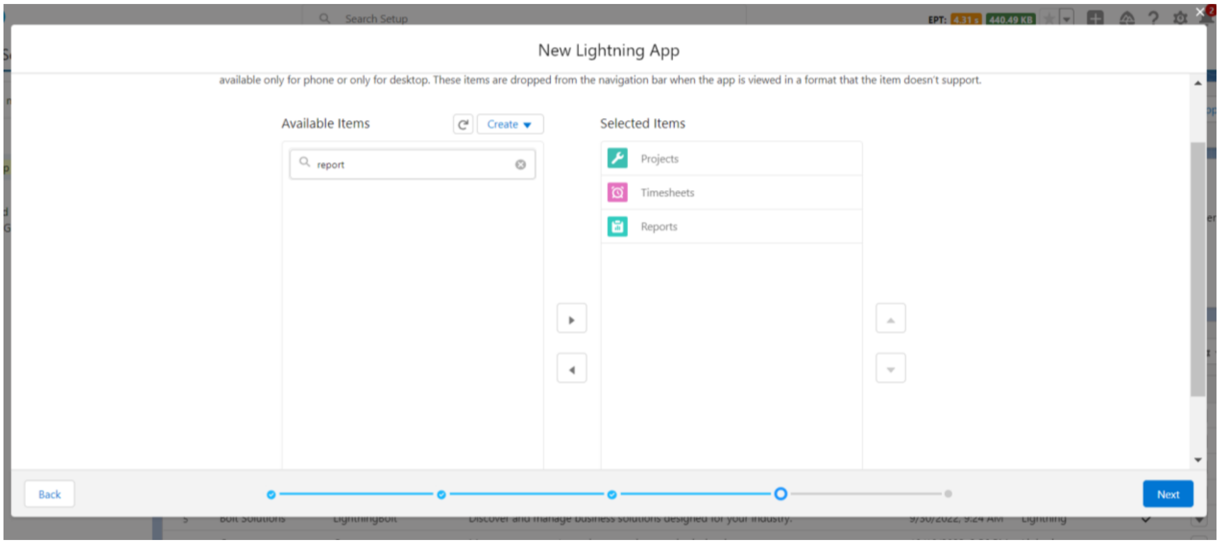
Leave everything as is -> Click Next



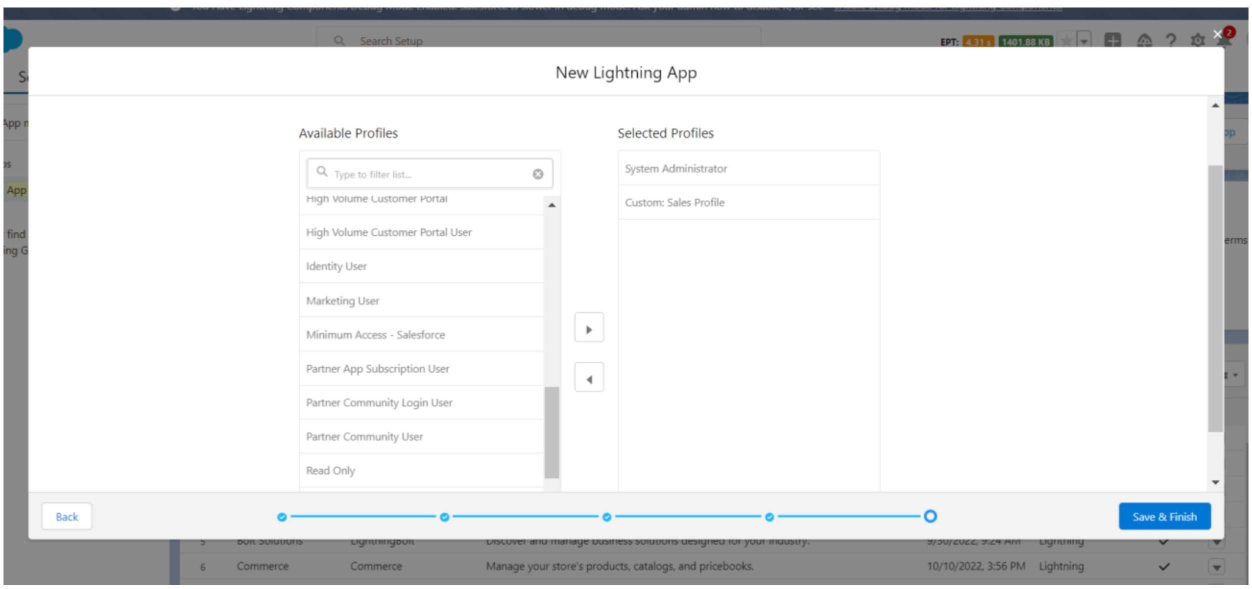
Click Next we don't want any utility items



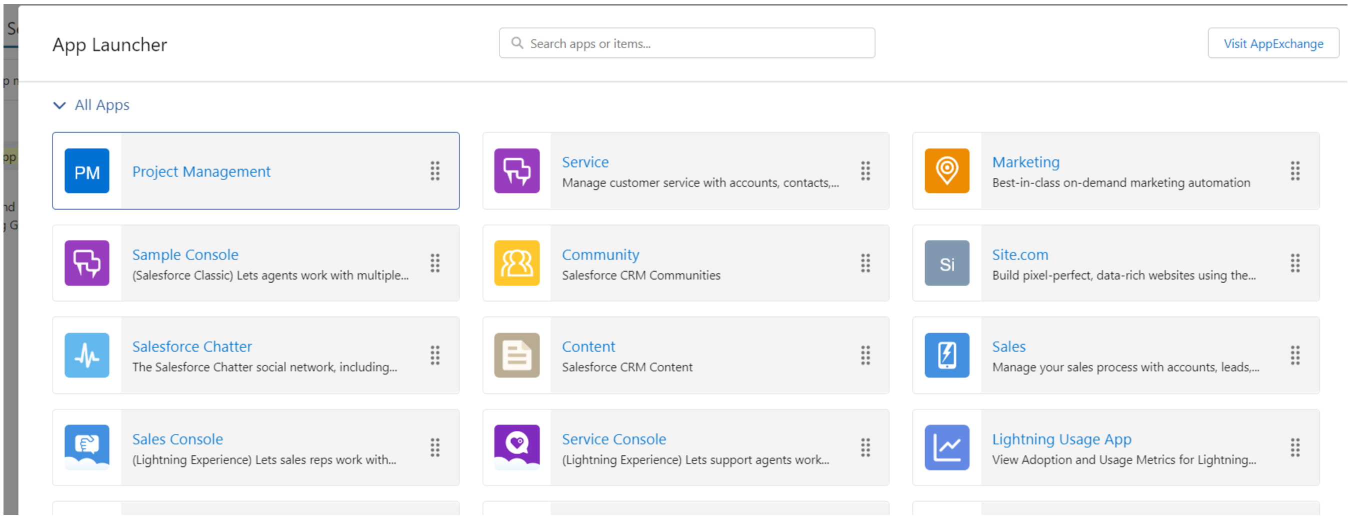
Under Navigation items search Project, Timesheets and Reports and add them to your selected items -> Click Next



Under User Profiles grant access to your specified Users -> Click Save & Finish

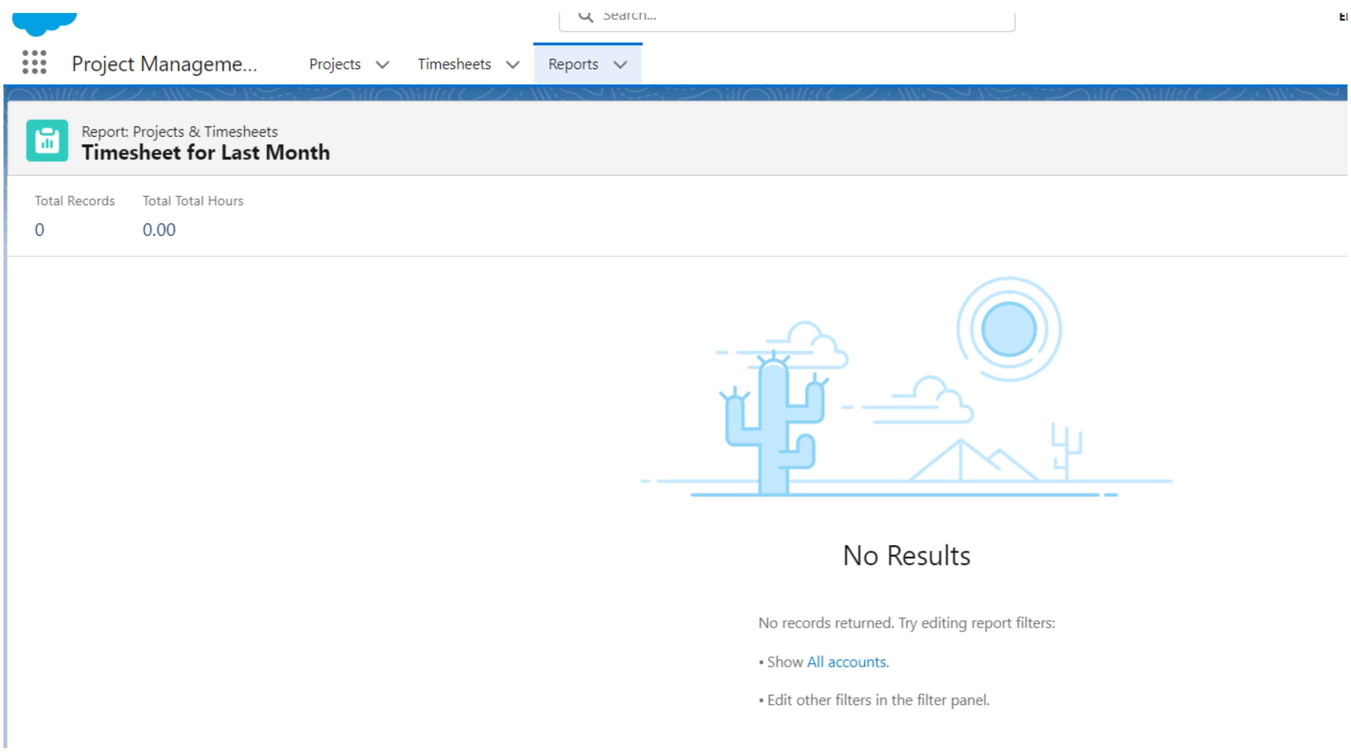


Now you have a New App in salesforce called Project Management



Lastly, we need to modify our formula for Last Months timesheet

Go to reports in your Project Management App and click on "Timesheets for Last Month" Report



Click on the address bar and select the Report ID, copy the Report ID

Next, click on Projects and then the gear icon and select edit Object -> Fields and Relationships -> Timesheet for Last Month-> Go to Formula Field and replace "//*Report ID Here*//" with the Report ID you copied.

14 items, Sorted by Field Label

Opportunity	Opportunity__c	Lookup(Opportunity)
Project description	Project_description__c	Text(255)
Project Name	Name	Text(80)
Project Status	Project_Status__c	Picklist
Project Type	Project_Type__c	Picklist
Remaining Hours	Remaining_Hours__c	Formula (Number)
Start Date	Start_Date__c	Date
Timesheet from Last Month	Timesheet_from_Last_Month__c	Formula (Text)
Total Hours	Total_Hours__c	Number(16, 2)

Project Custom Field

Timesheet from Last Month

Back to Project

Custom Field Definition Detail

Edit | Set Field-Level Security | View Field Accessibility | Where is this used?

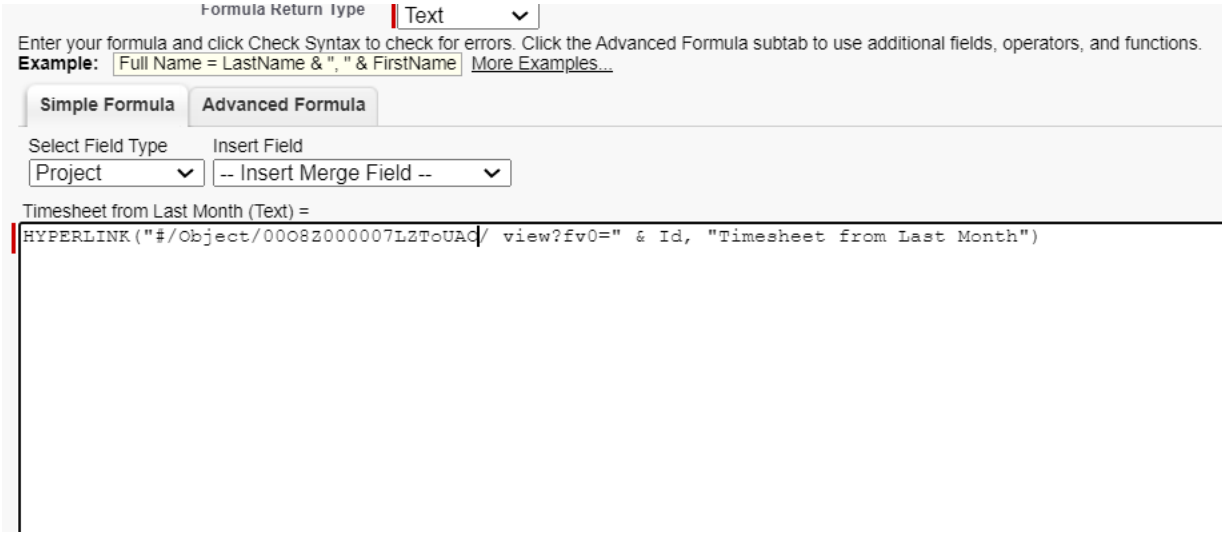
Field Information

Field Label	Timesheet from Last Month
Field Name	Timesheet_from_Last_Month
API Name	Timesheet_from_Last_Month__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Maia Young, 10/21/2022, 9:38 AM

Formula Options

Data Type	Formula

HYPERLINK("#/Object/*Report ID Here*/ view?fv0=" & Id, "Timesheet from Last Month")

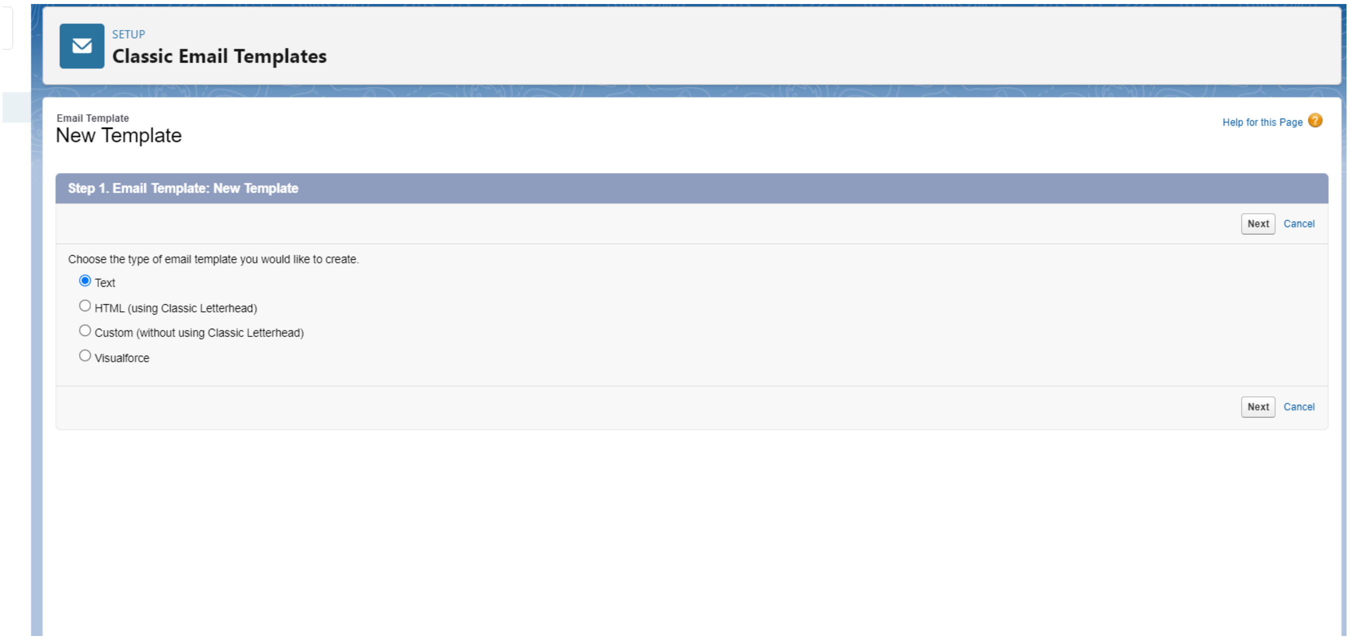


Click Save

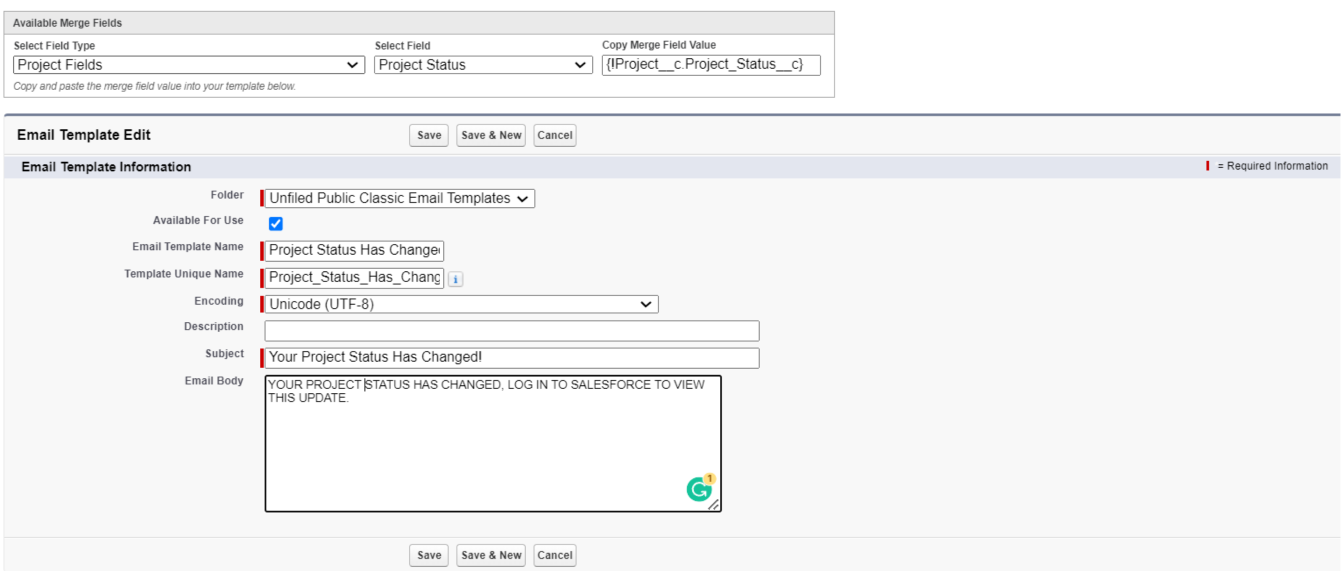
Now let’s create a custom email template to send when an opportunity stage changes

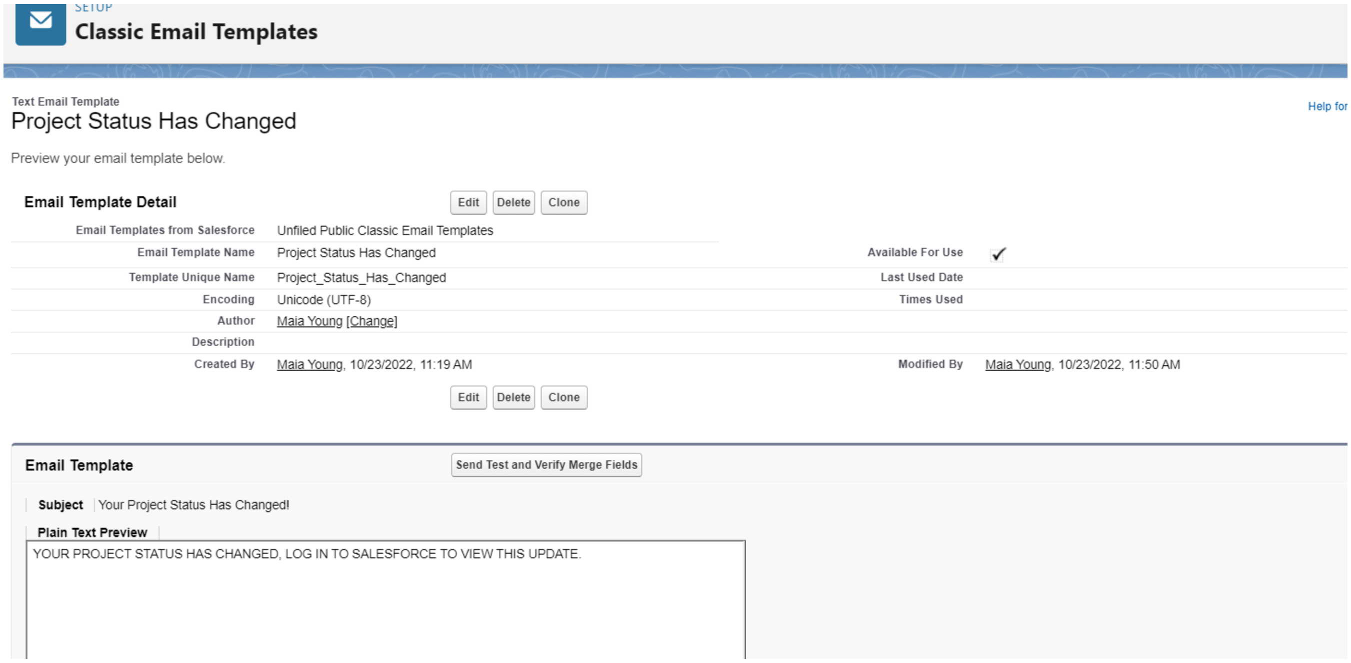
Create Custom Email Template

Go to Setup -> Type in quick find Email templates -> Select Classic and New Email Template -> Select text and click Next



Now select Project Fields under Field Type -> Select Project Status -> Click the checkbox Available For Use -> Add Email template Name, Subject and fill in the Email body -> Save

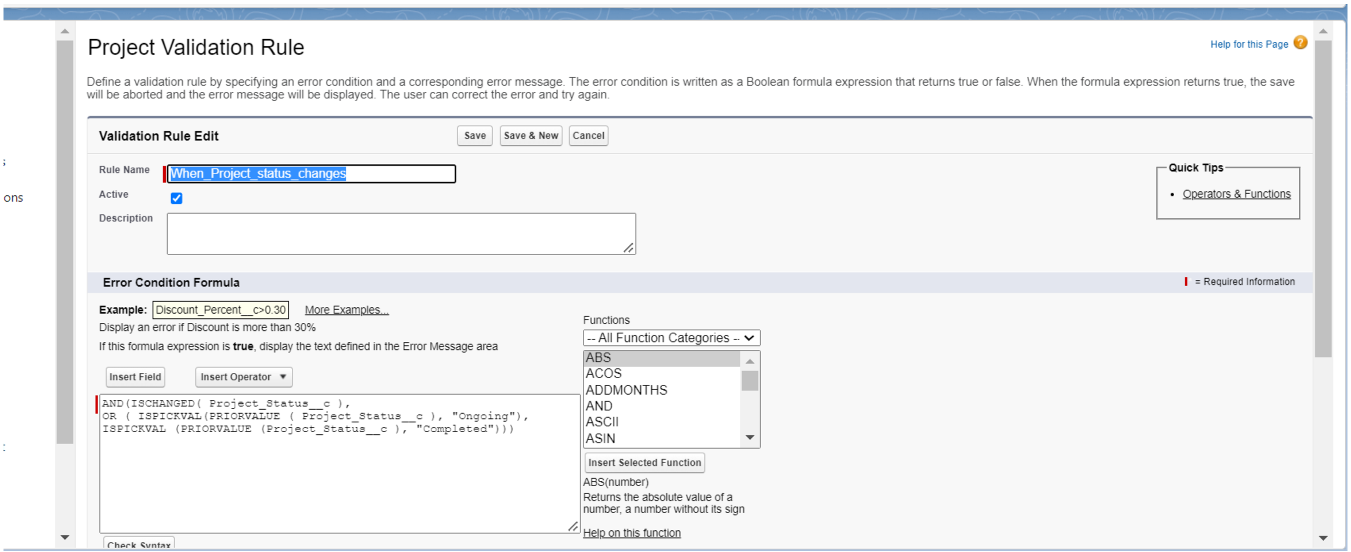




Next we need to Create a validation Rule to trigger the email alert

Validation Rules

Go to Setup and then Object Manager -> select the Project Object and select Validation Rules in side panel-> Click new



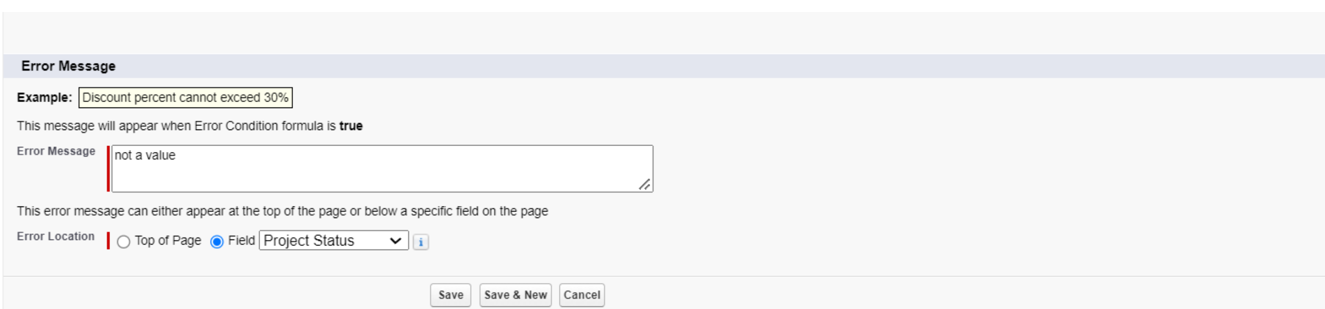
Fill in the Rule name -> check Active and insert your formula

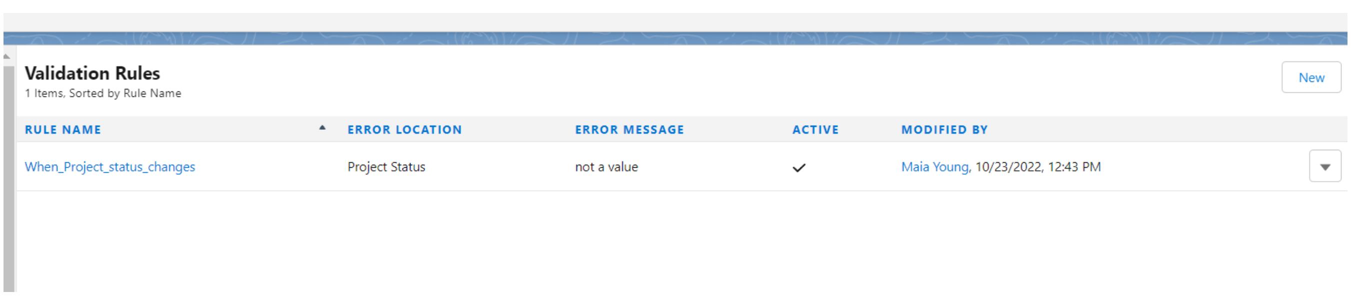
AND(ISCHANGED(Project_Status__c),

OR (ISPICKVAL(PRIORVALUE (Project_Status__c), "Ongoing"),

ISPICKVAL (PRIORVALUE (Project_Status__c), "Completed")))

Next add an error message and click Save

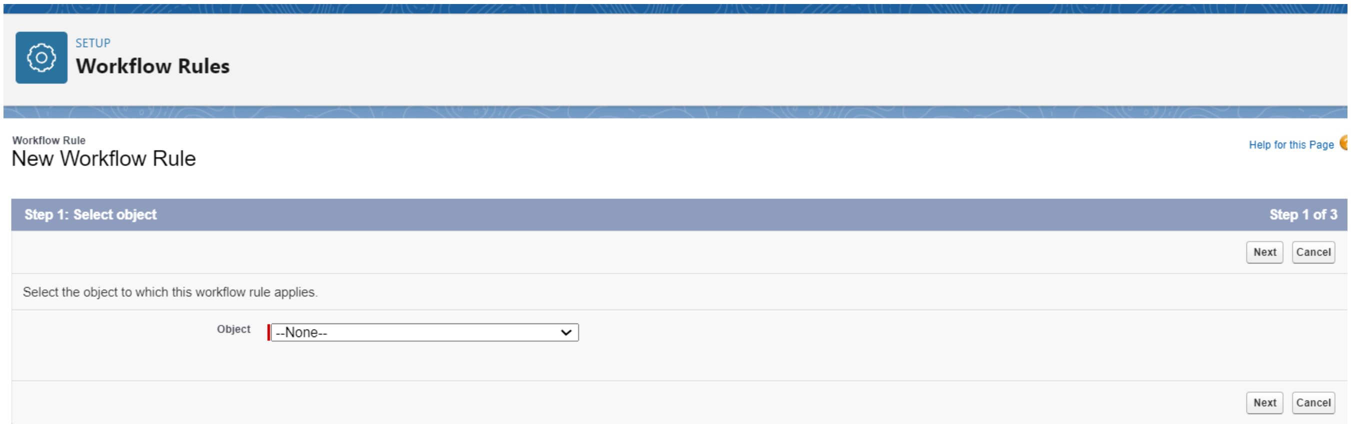




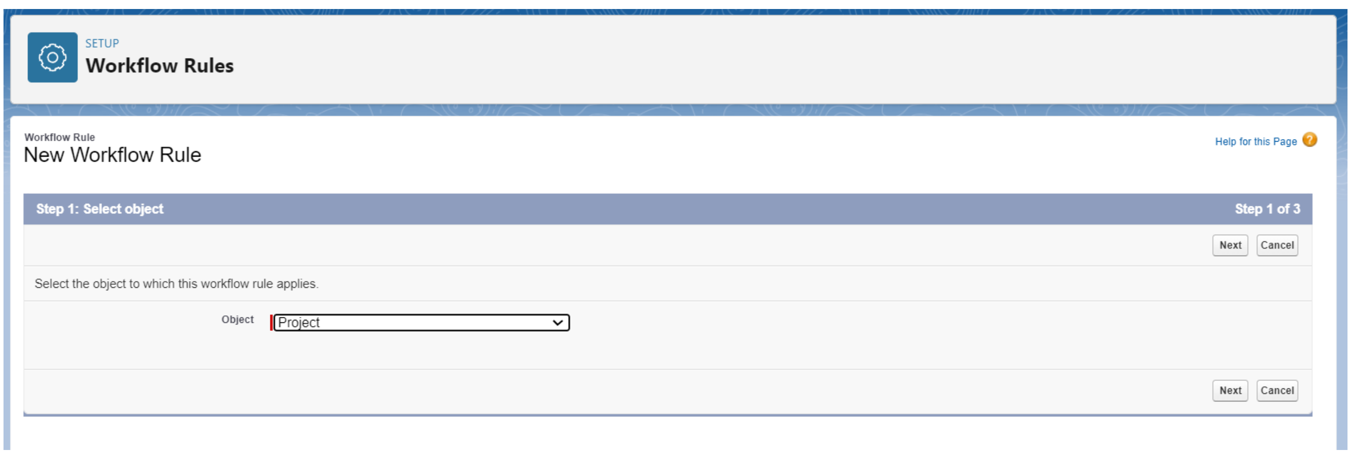
Next we need to set up an Email Workflow Rule to send the Email when the Status changes

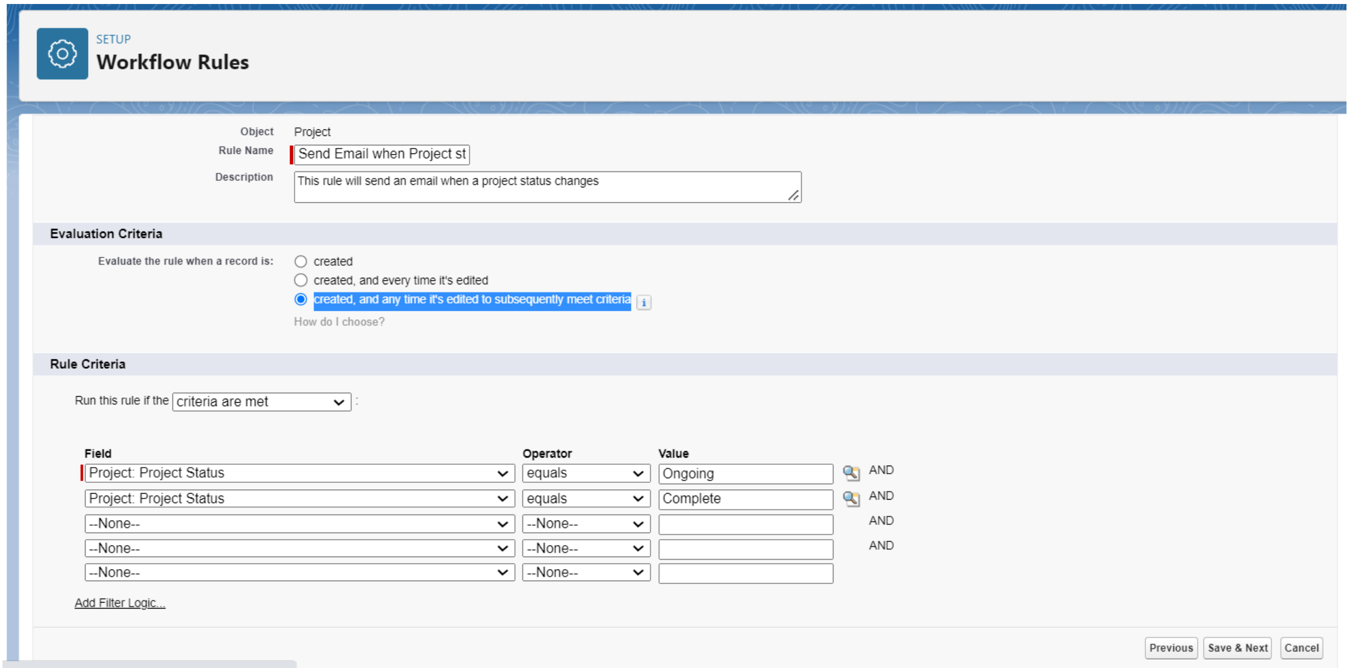
Workflow Rules & Email Notification

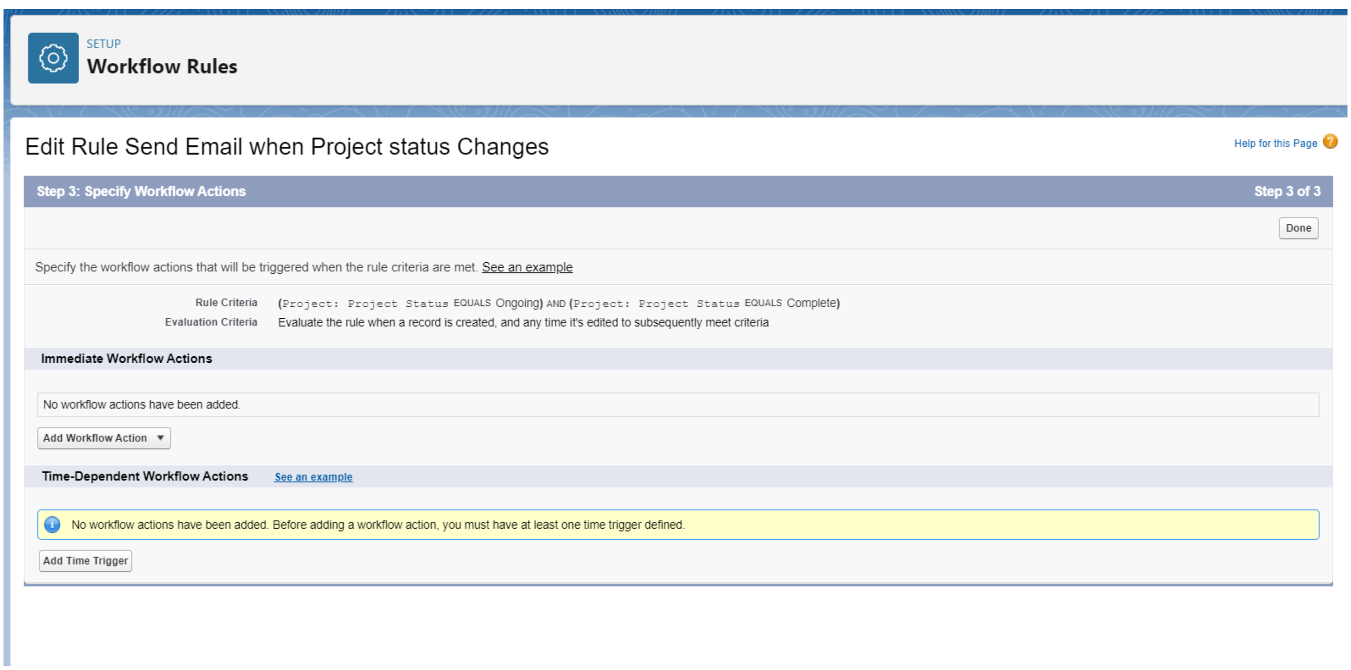
Go to setup-> Search for Workflow Rules -> Continue -> Click New



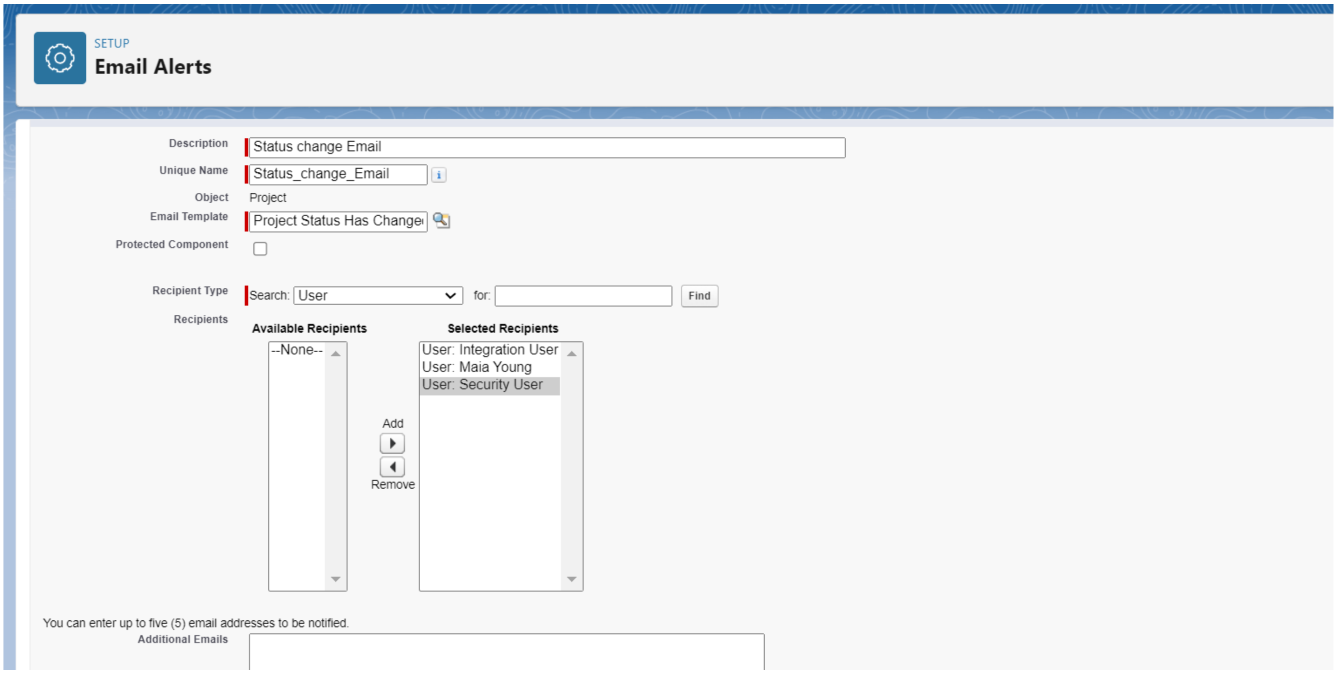
Select the Project object -> click Next -> Rule Name will be "Send Email when Project Status Changes" -> Fill in your description -> Select "created, and any time it's edited to subsequently meet criteria" -> Select "Run this Rule if the Criteria Are Met" -> Fill in criteria shown below and click Save & Next

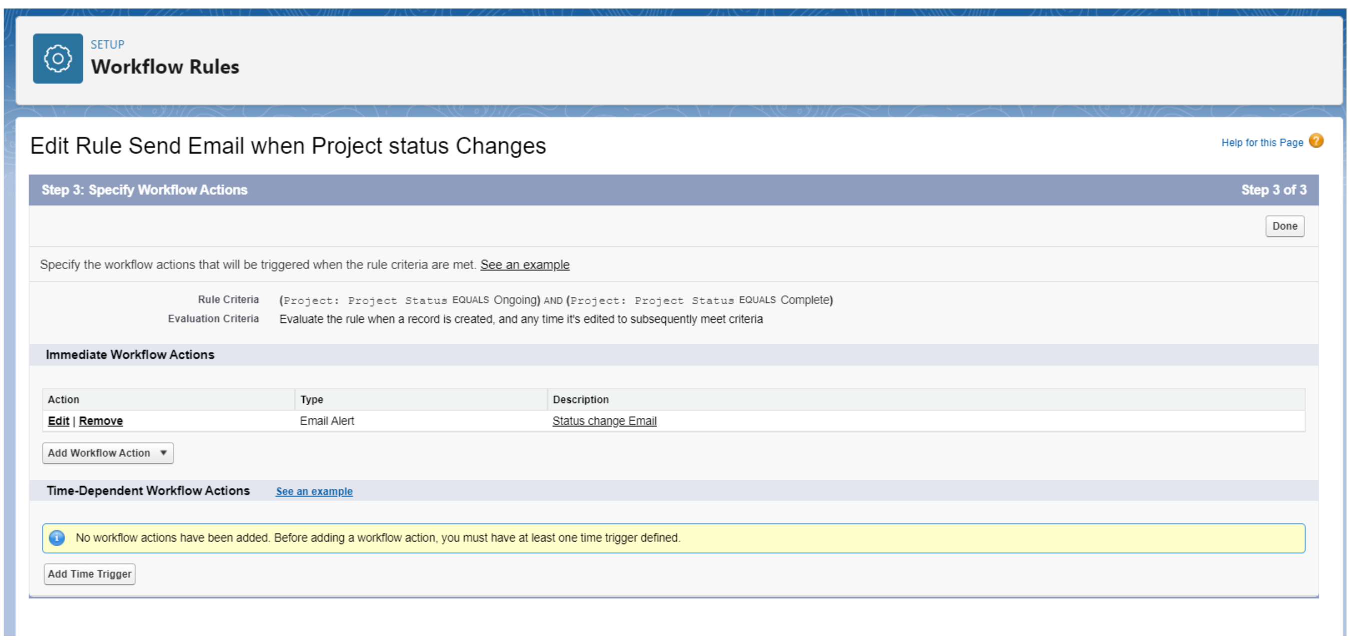






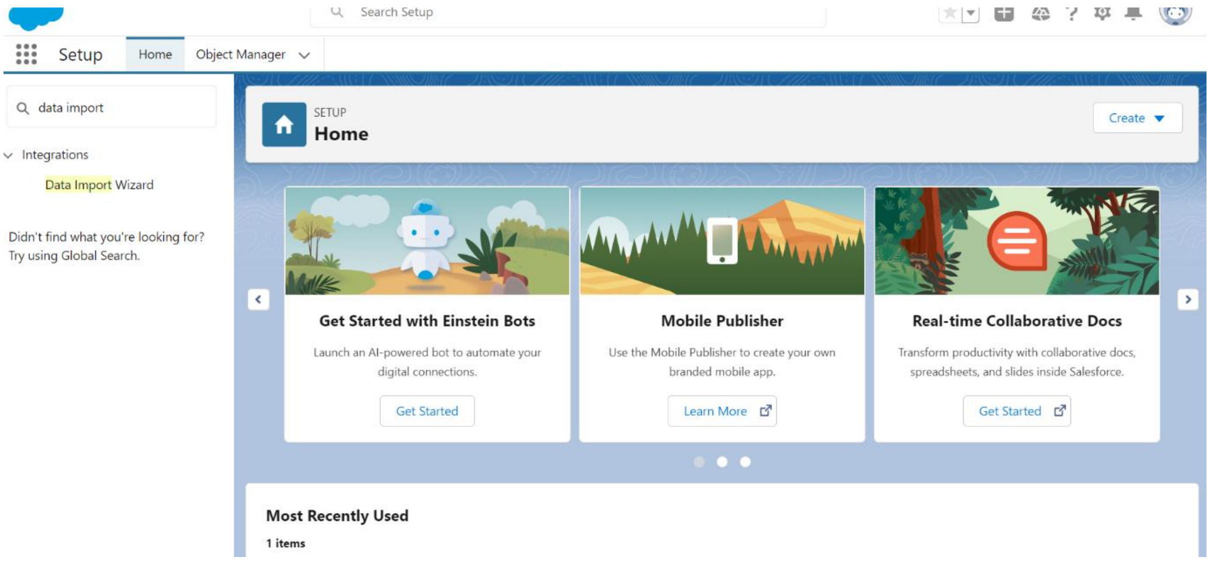
Now Add a Workflow action-> Click New Email Alert -> Fill out description field and Select your email template that you created -> Select Users and enter any additional email addresses you need up to 5 -> Click Save & Done


SETUP
Email Alerts
Description
Status change Email
Unique Name
Status_change_Email
Object
Project
Email Template
Project Status Has Change
Protected Component
Recipient Type
Search: User
for:
Find
Recipients
Available Recipients
Selected Recipients
--None--
User: Integration User
User: Maia Young
User: Security User
Add
Remove
You can enter up to five (5) email addresses to be notified.
Additional Emails

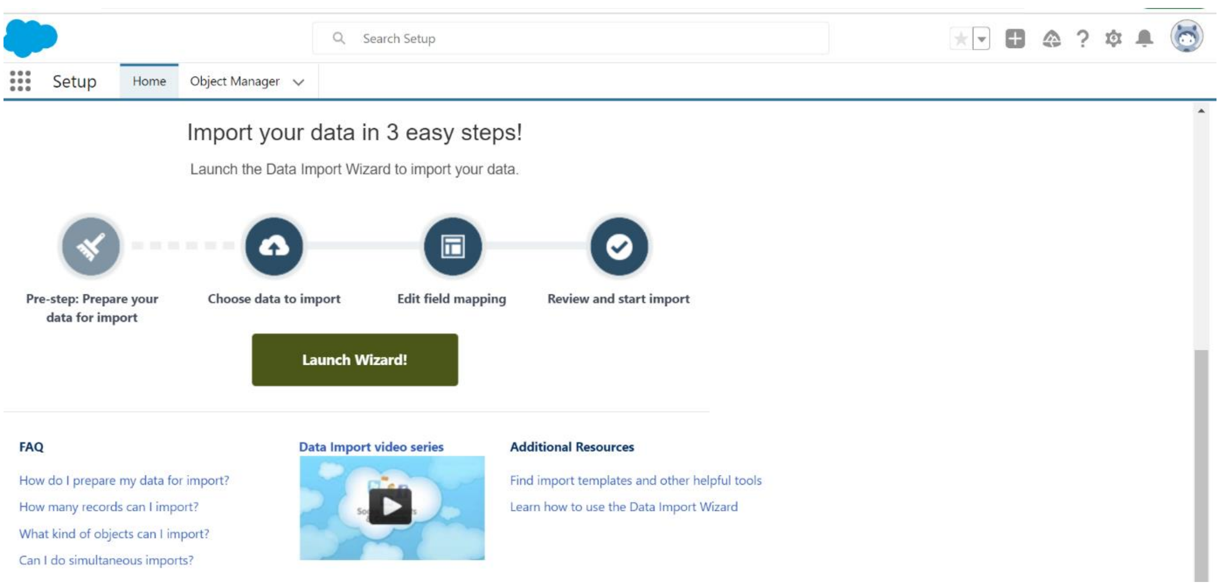

SETUP
Workflow Rules
Edit Rule Send Email when Project status Changes
Help for this Page
Step 3: Specify Workflow Actions
Step 3 of 3
Done
Specify the workflow actions that will be triggered when the rule criteria are met. See an example
Rule Criteria
(Project: Project Status EQUALS Ongoing) AND (Project: Project Status EQUALS Complete)
Evaluation Criteria
Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Immediate Workflow Actions
Action
Type
Description
Edit | Remove
Email Alert
Status change Email
Add Workflow Action
Time-Dependent Workflow Actions
See an example
No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.
Add Time Trigger

Import Data

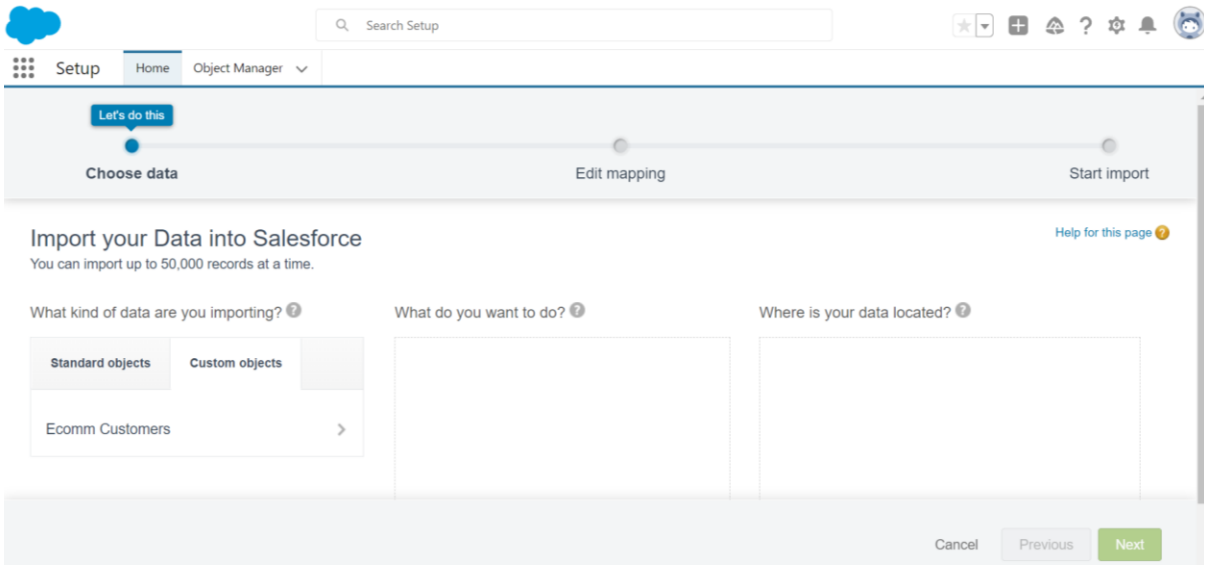
Navigate to Setup and type Data Import into search box.



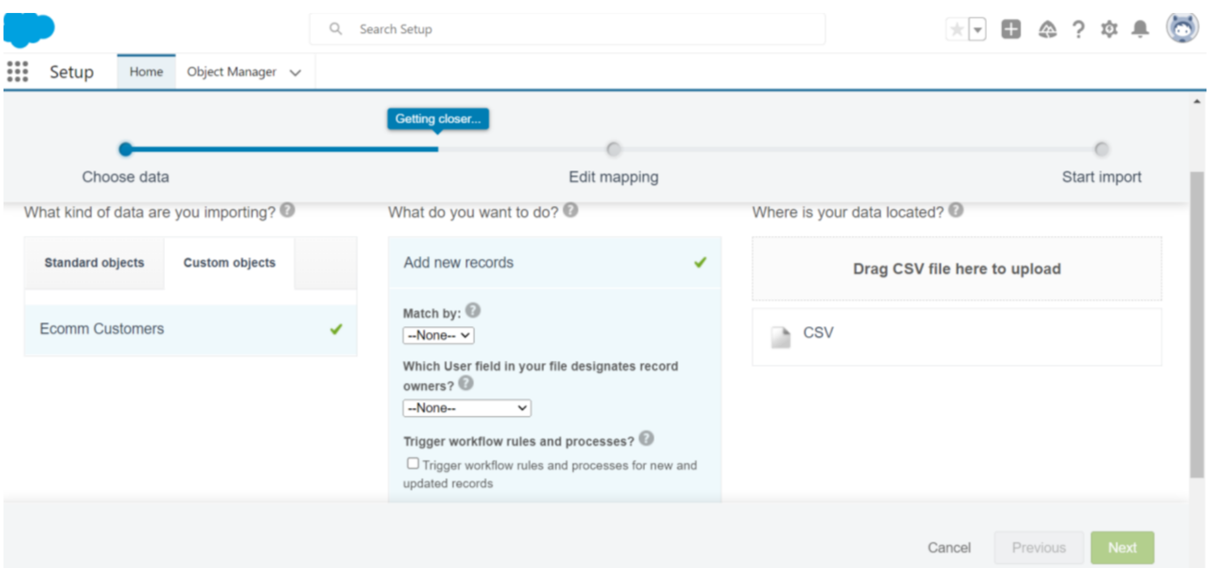
Click on data Import Wizard scroll and click Launch wizard.



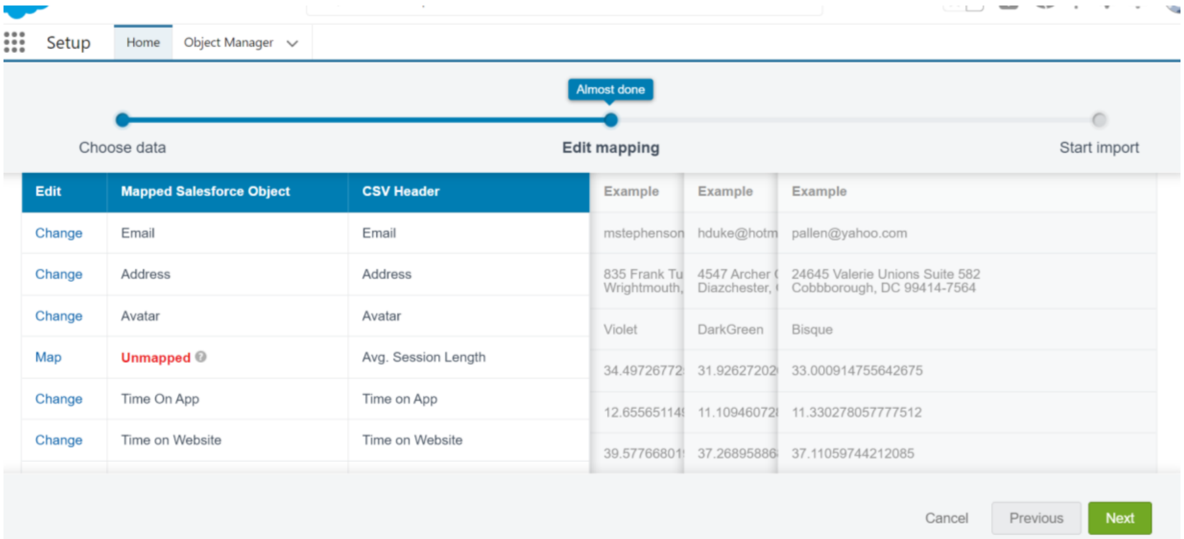
Click on Custom Objects, Select the object



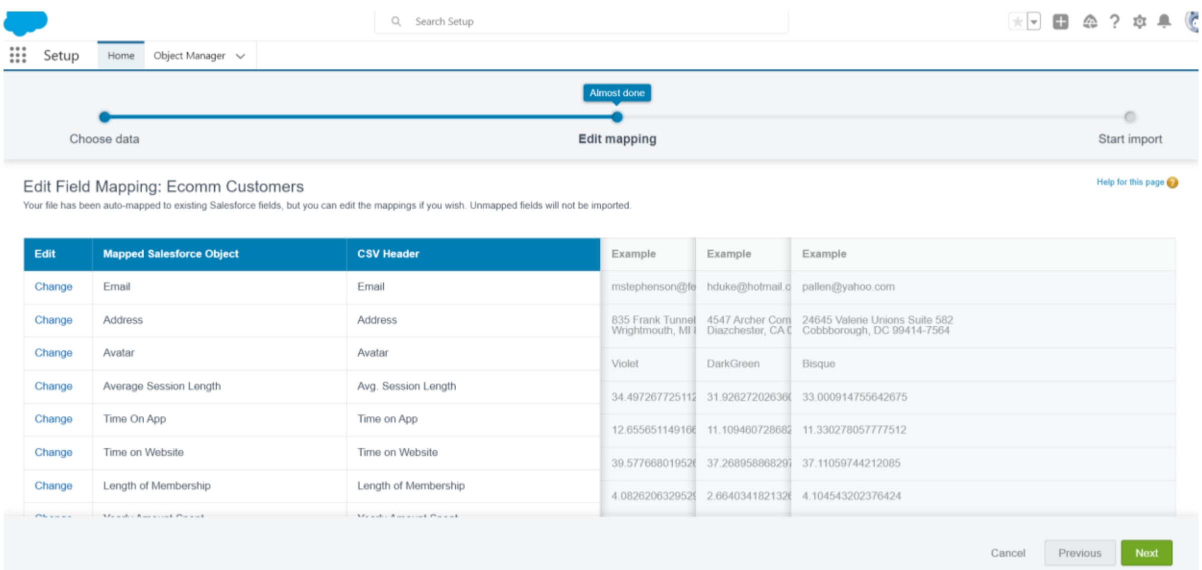
You will be asked if you are updating existing records, adding new records or updating and adding new records. Select whichever option applies.



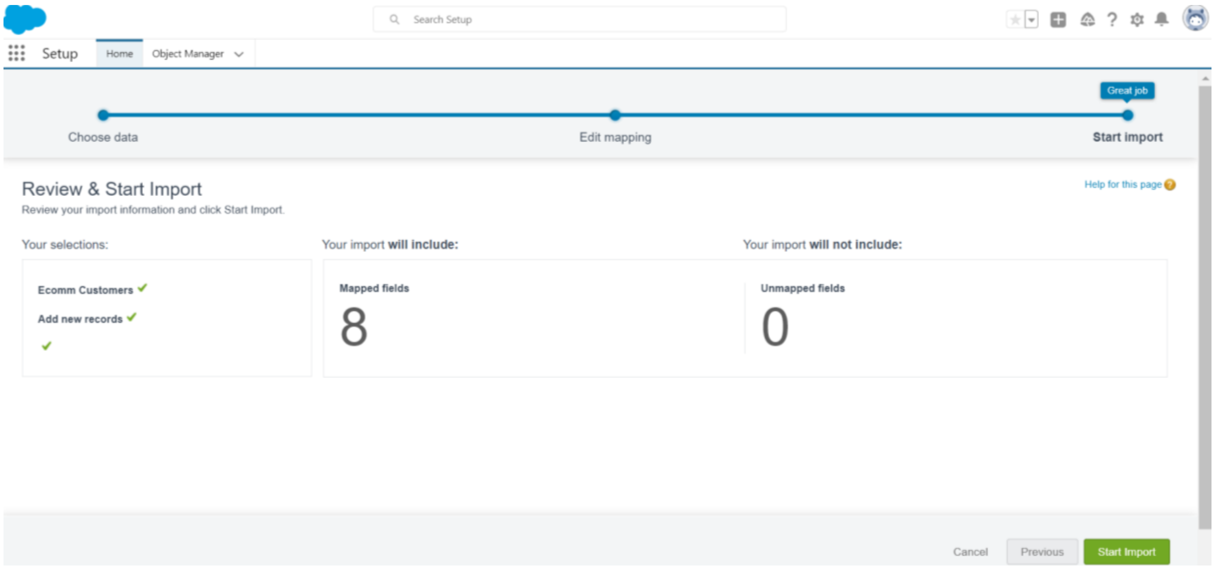
Adjust options to fit your needs and select the CSV file you wish to upload. Drag & Drop or upload by searching on your computer.

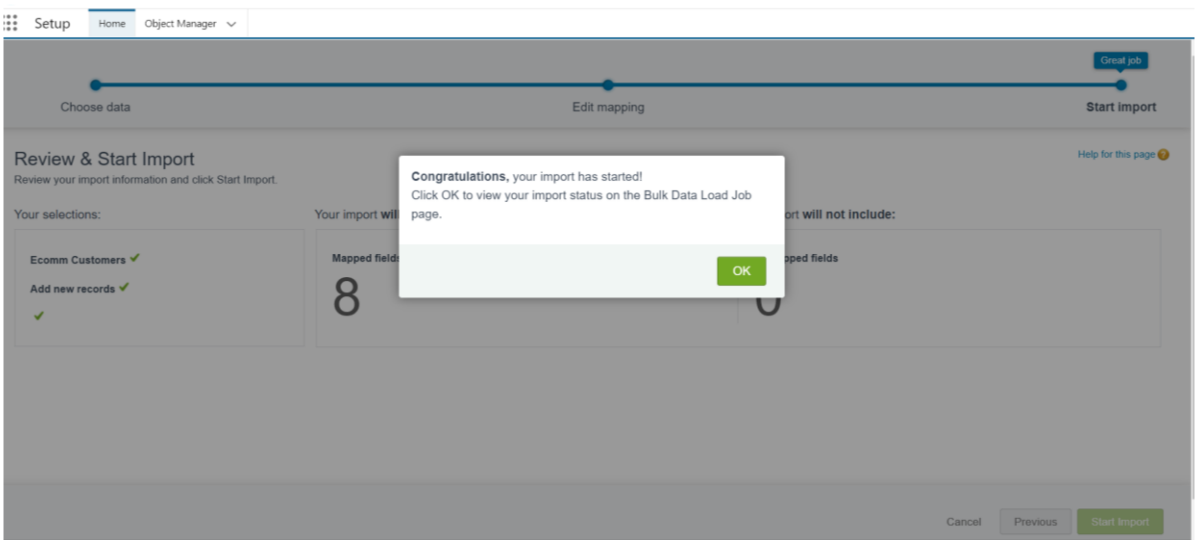


Upload and make sure all data Maps to the correct Field.

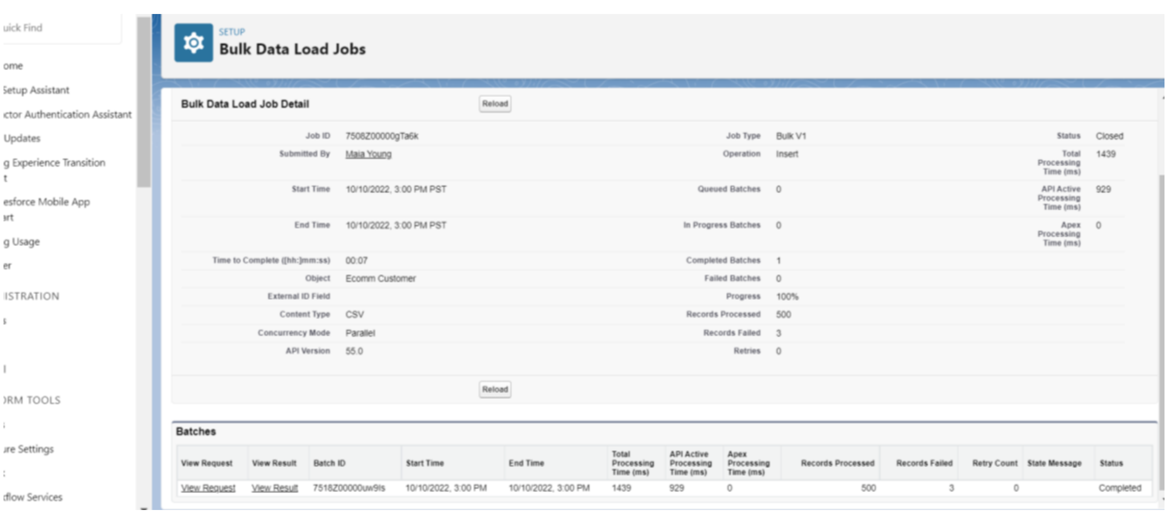


Click Next and Start Import





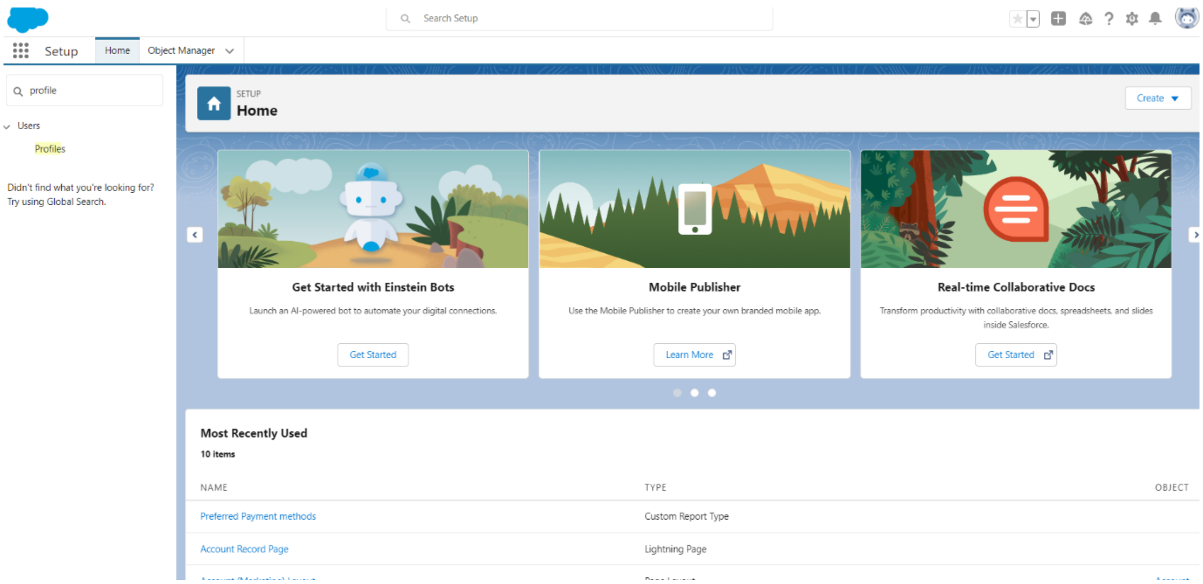
View your completed import



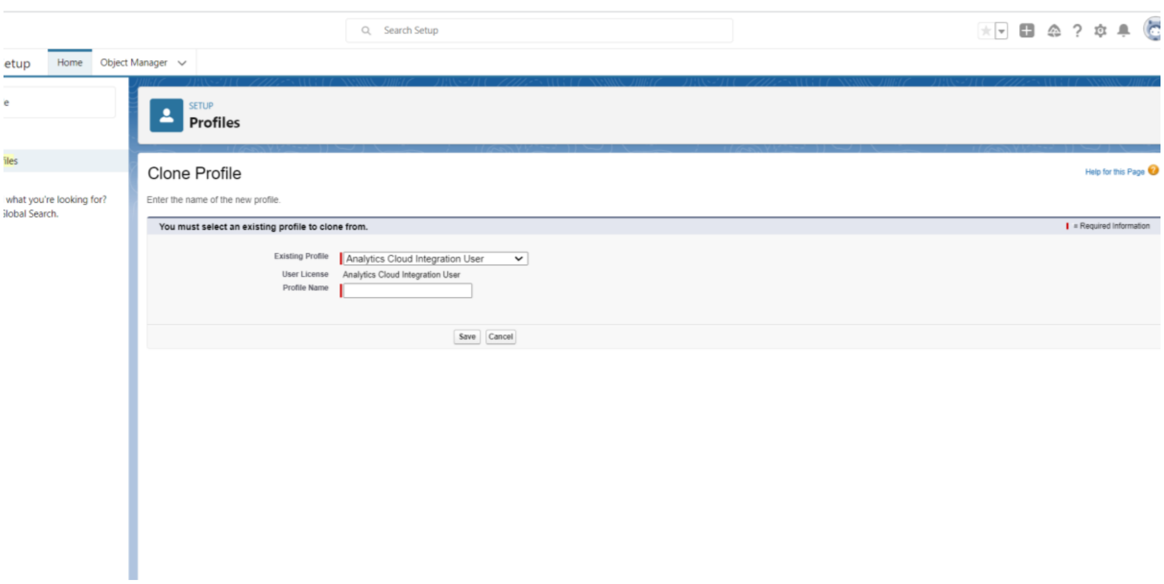
Create a Profile in Salesforce

Click the gear icon and click Setup

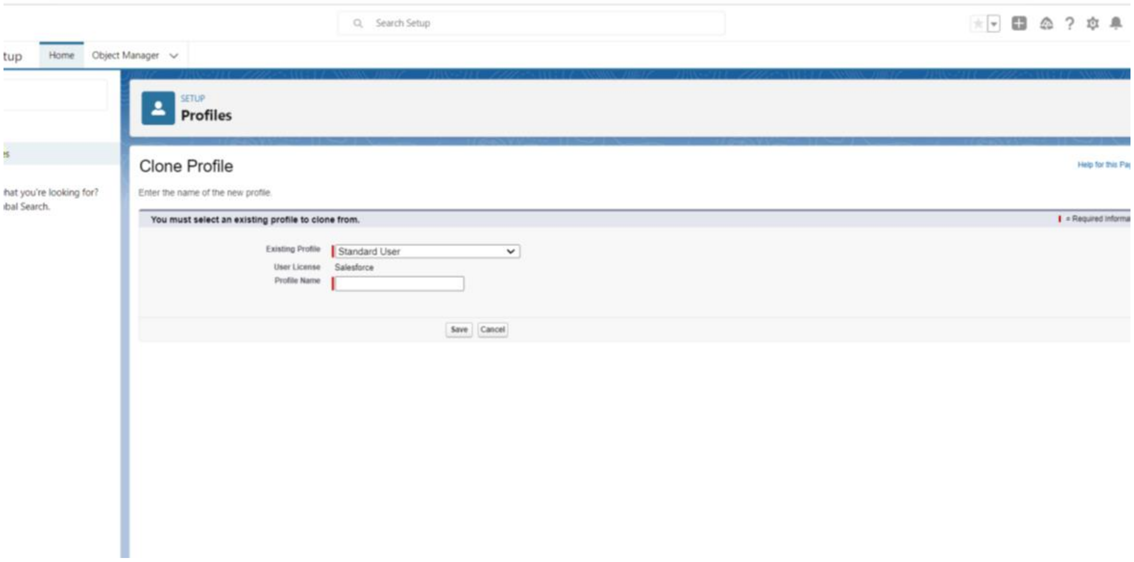
Type Profiles in Quick find and click Profiles



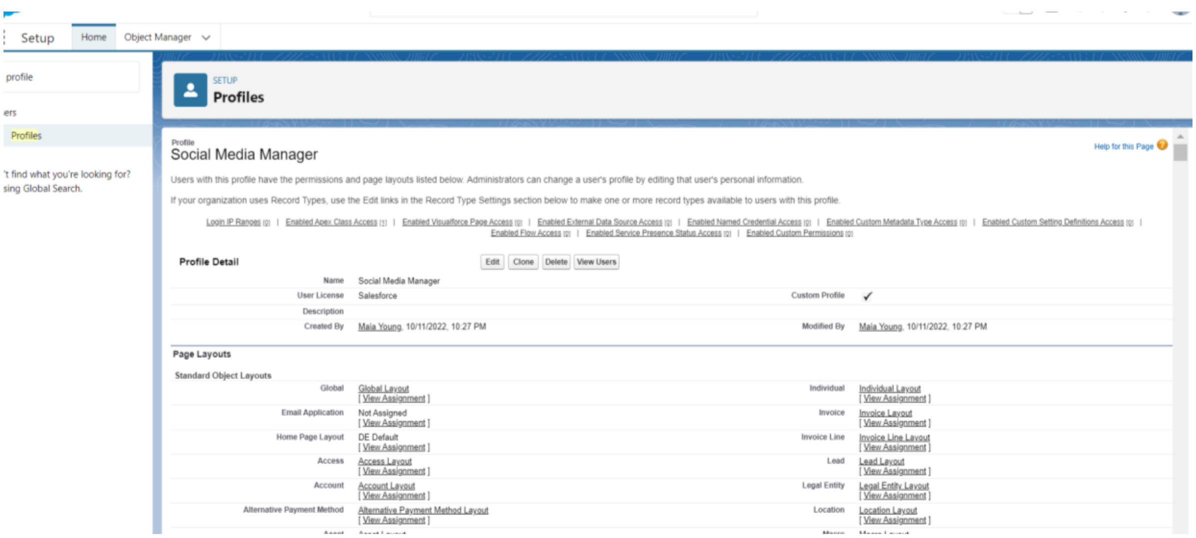
Click Create New Profile



Click a profile to clone from



Enter a Profile Name and click Save



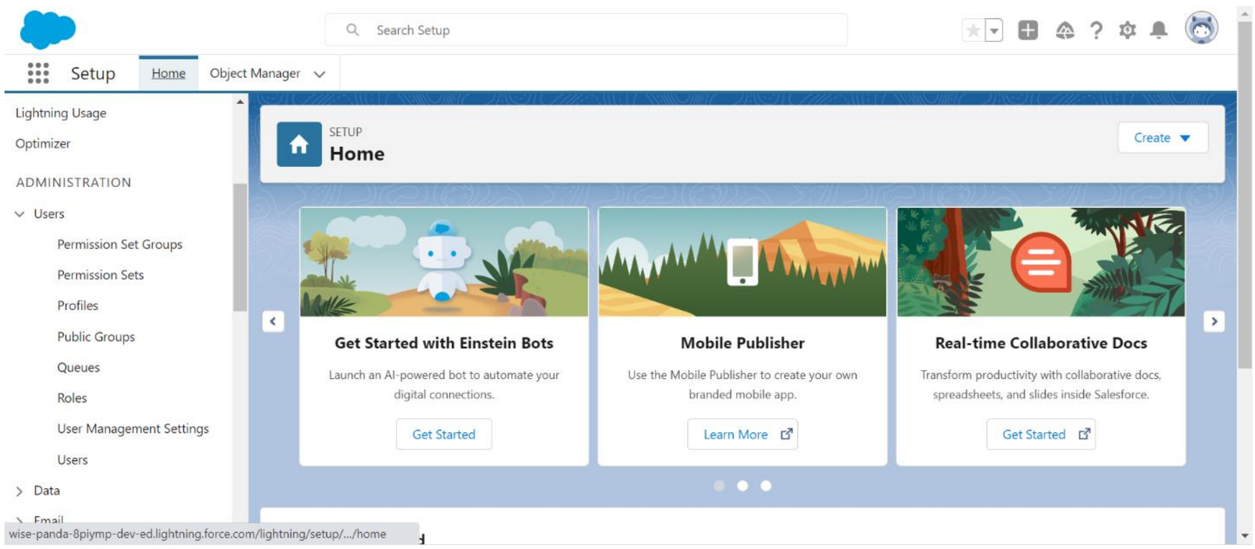
You can edit Permissions and Layouts.

Create a Profile for Social media Manager and one for Social Media Strategist

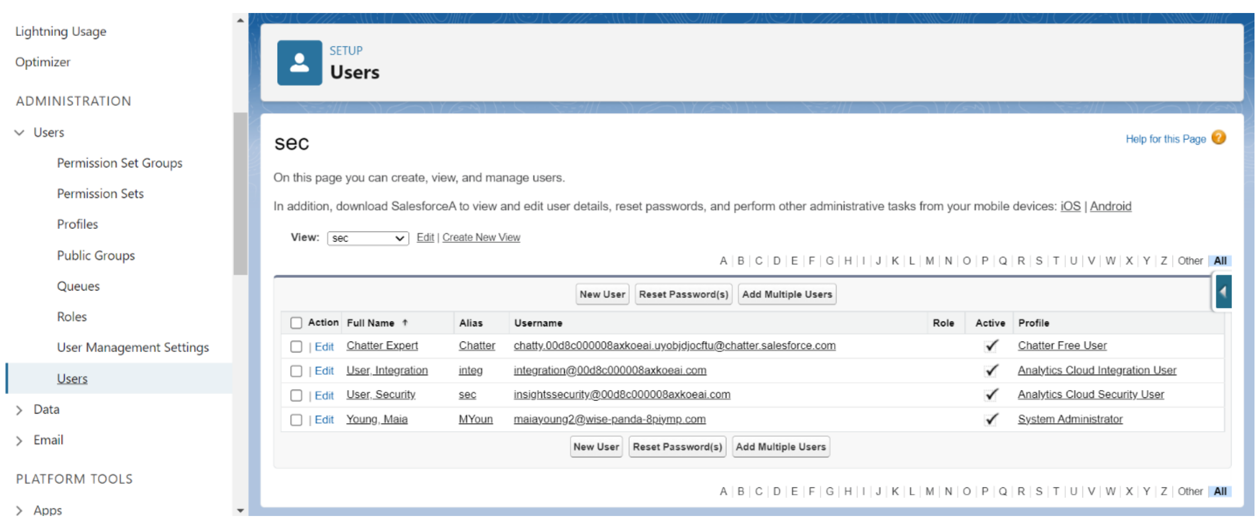
Create a User

Click on gear icon and go to **Setup**.

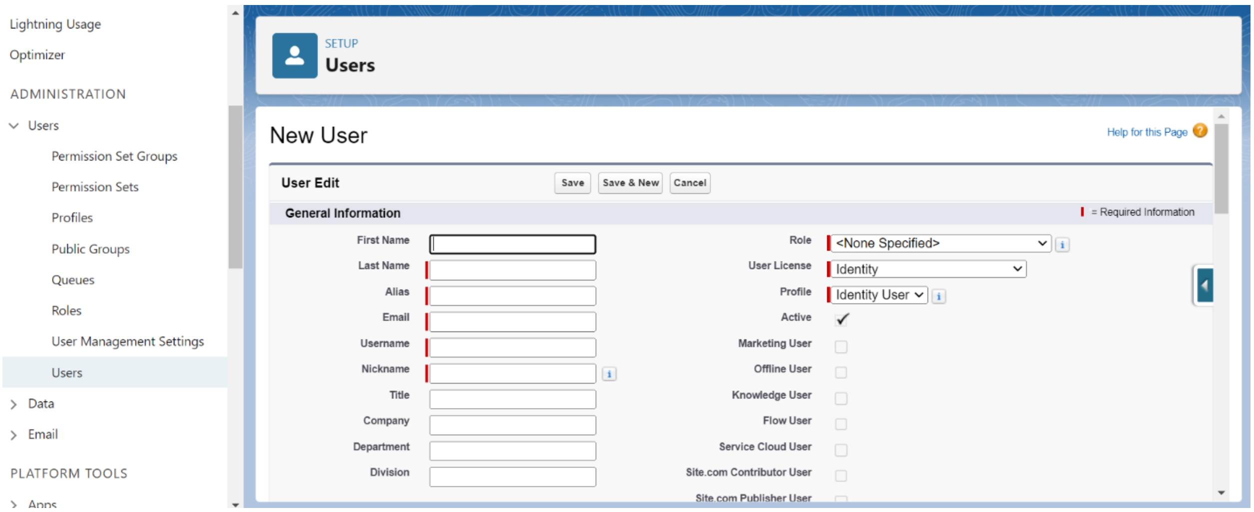
Once in setup search **User** in quick find box.



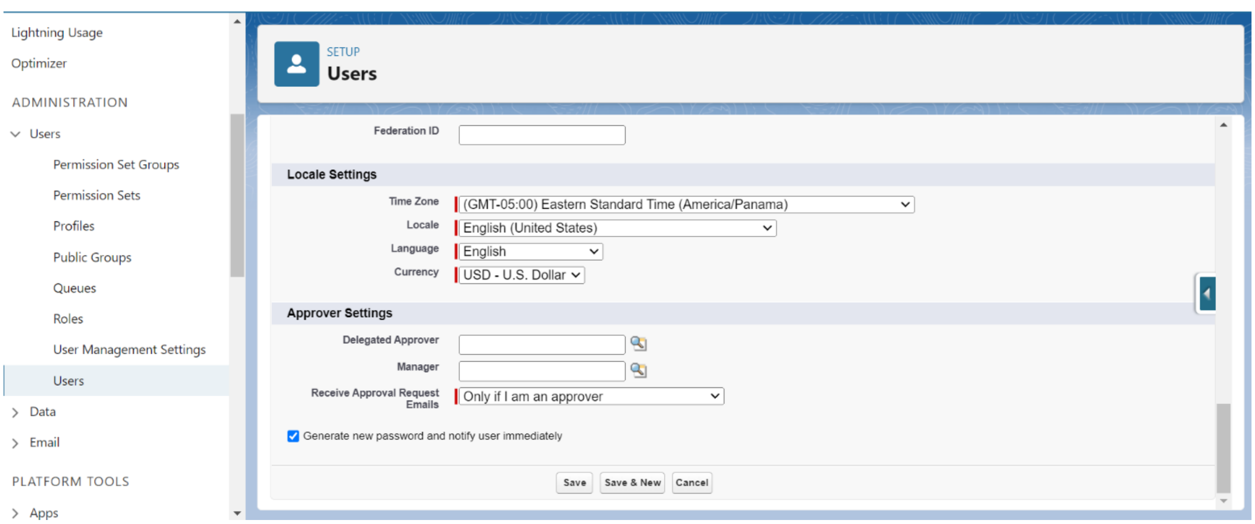
Click **Users** to see current **Users**



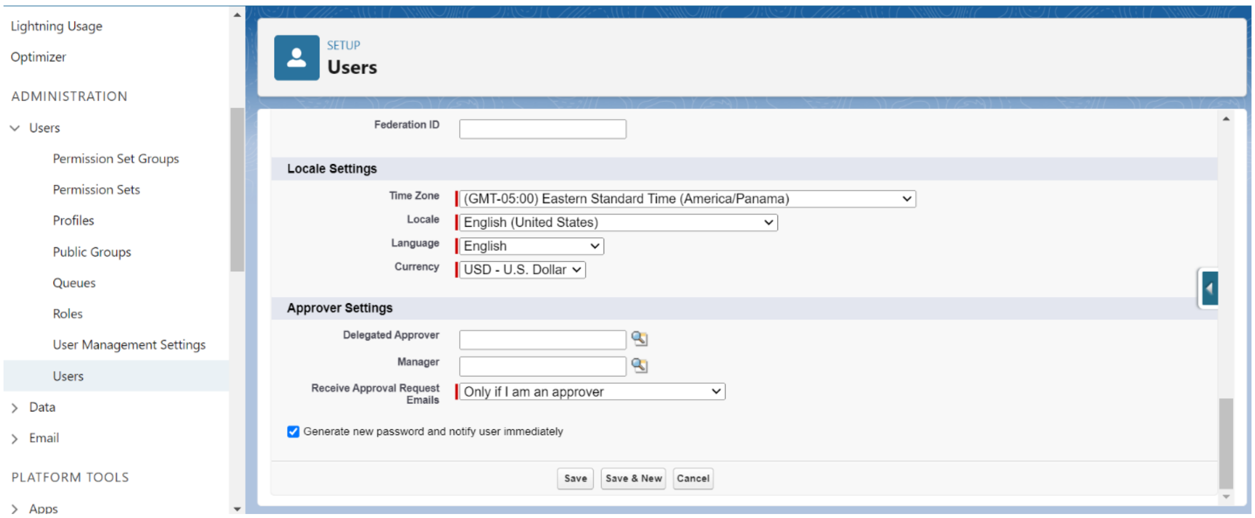
Click **New User** and fill out General Information. All fields marked with red are mandatory. Be sure to click in User License and select the correct license for the specified role of the user in the organization.

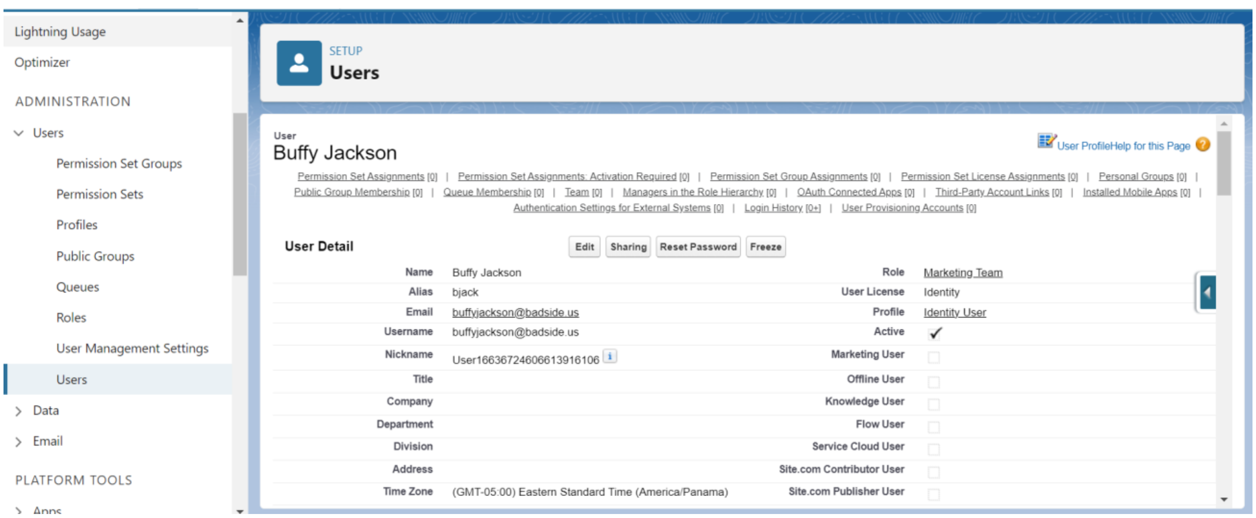


Scroll to complete **Mailing Address**, **Single Sign** on Information, **Locale settings** and **Approver Settings**.

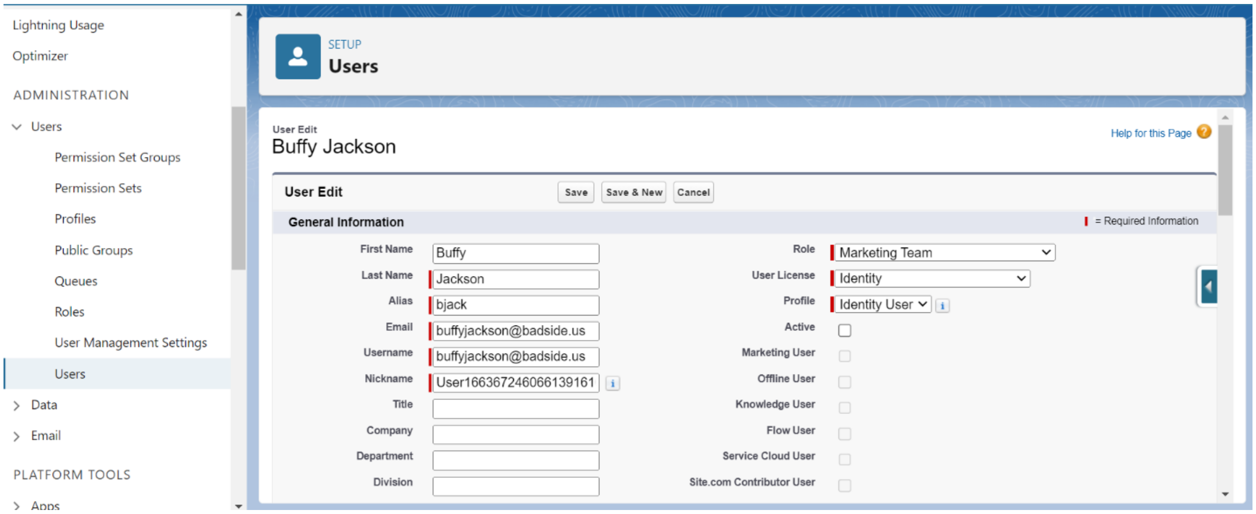


Be sure to click the box to "Generate New Password Automatically" if you are adding a New User to the organization who needs to be able to sign in and click **Save** to save your new user profile.



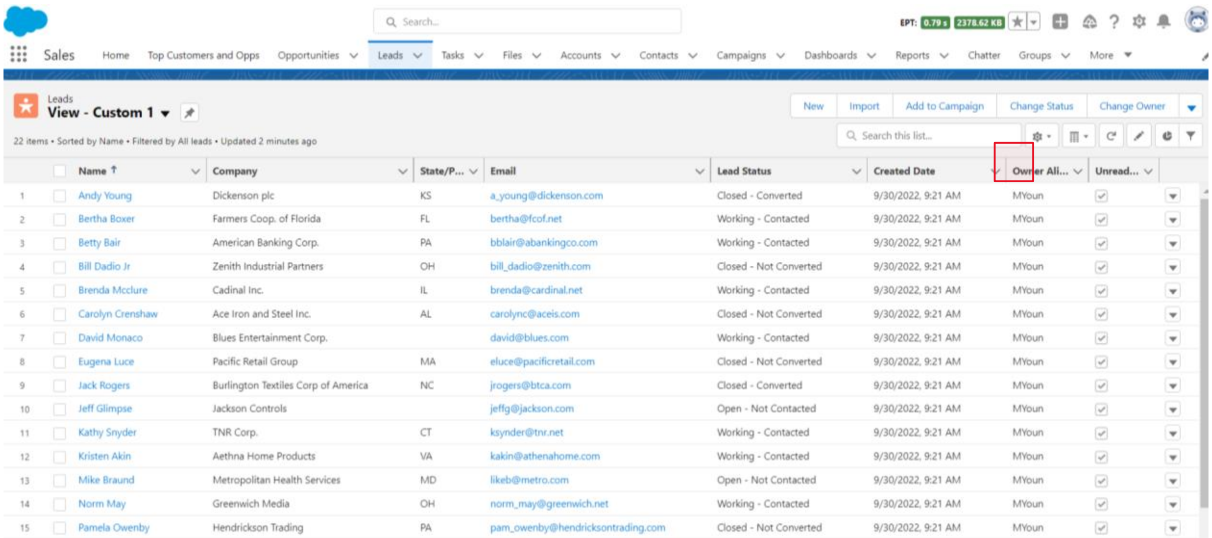


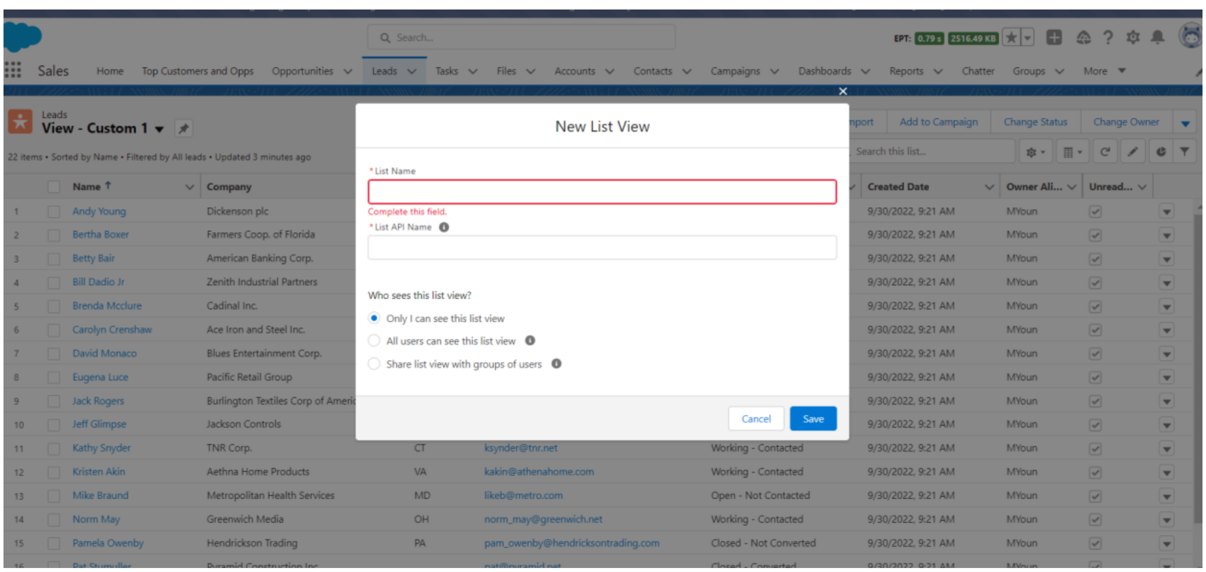
To Deactivate a **User** click on edit and uncheck the **Active** box and click Save to make the user inactive.



Create List View Customizations

Go to Leads tab in your org and click on the gear icon and select New





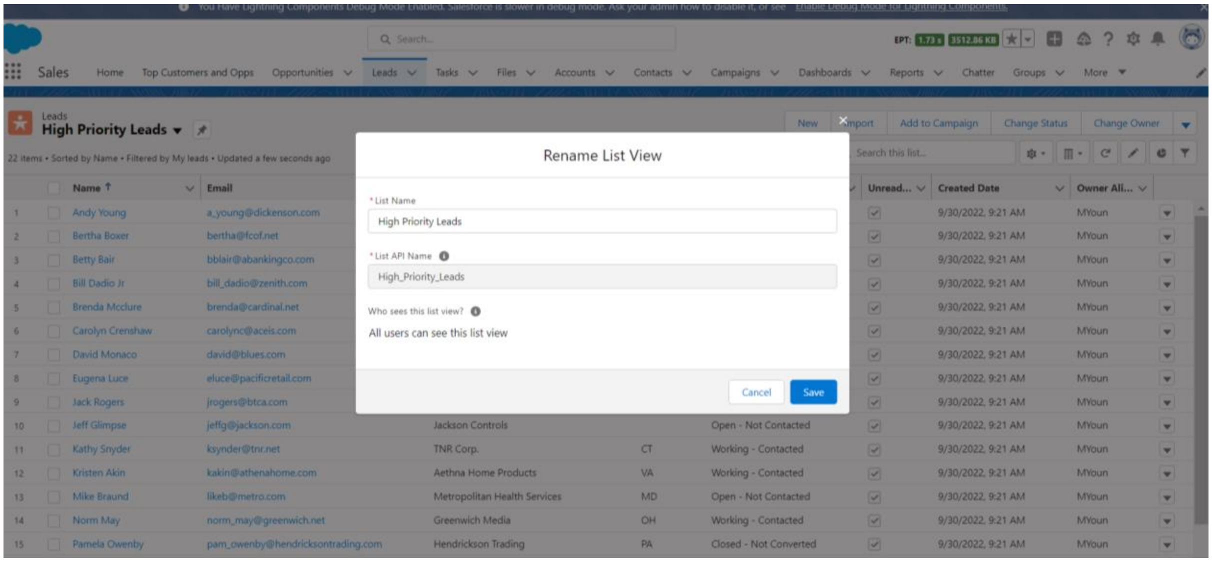
Select New.

Enter a new name in the List Name field.

The List API Name is auto generated.

Select who should be able to see this list.

Click Save.

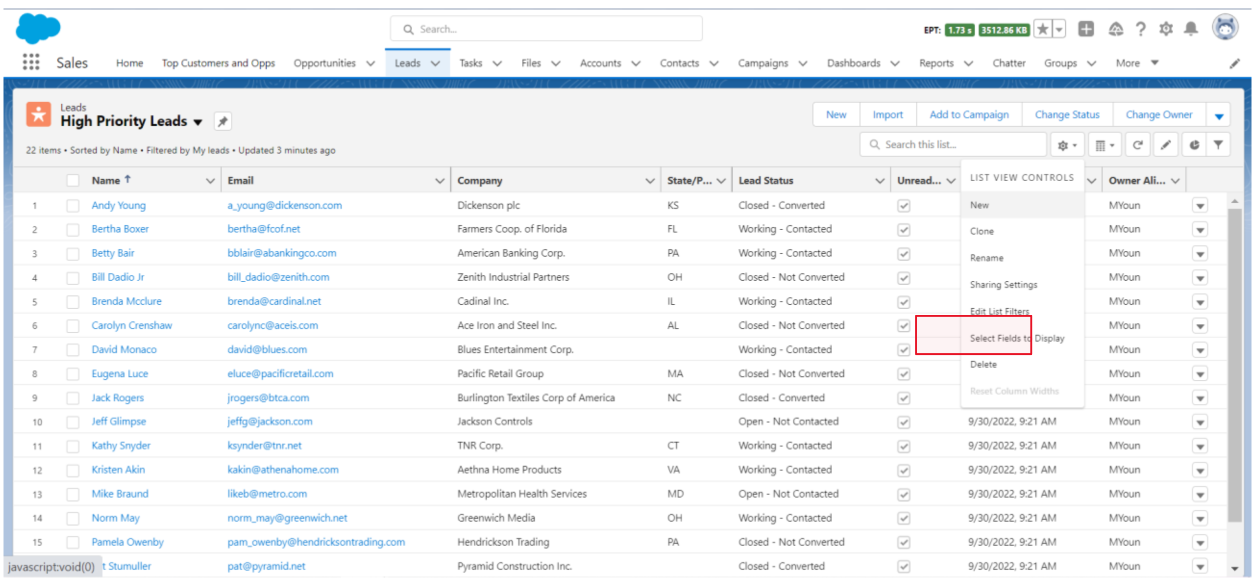


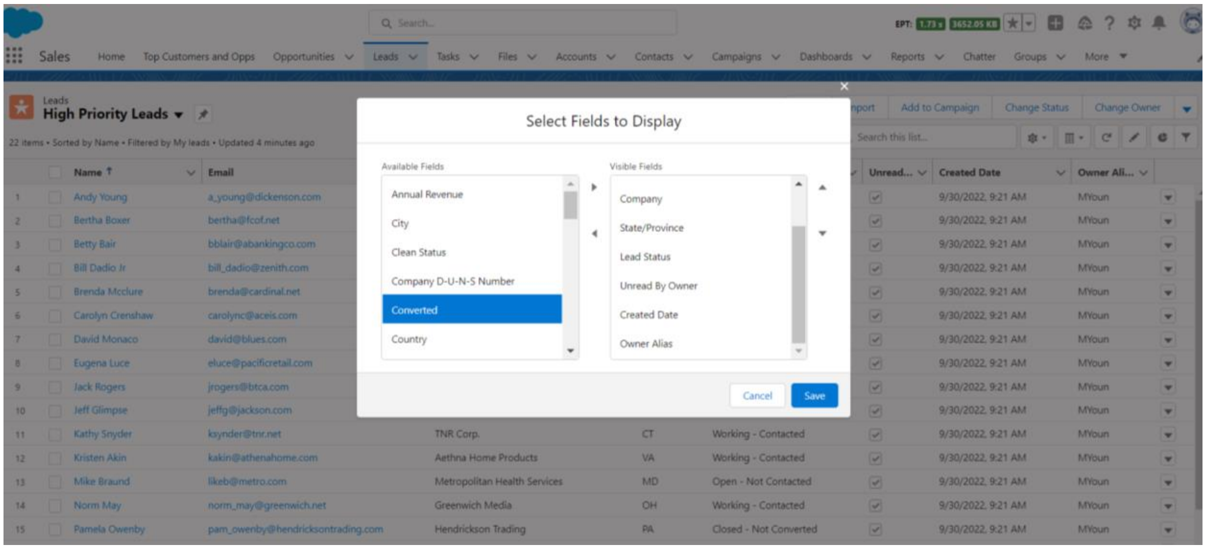
Click the List View Controls icon.

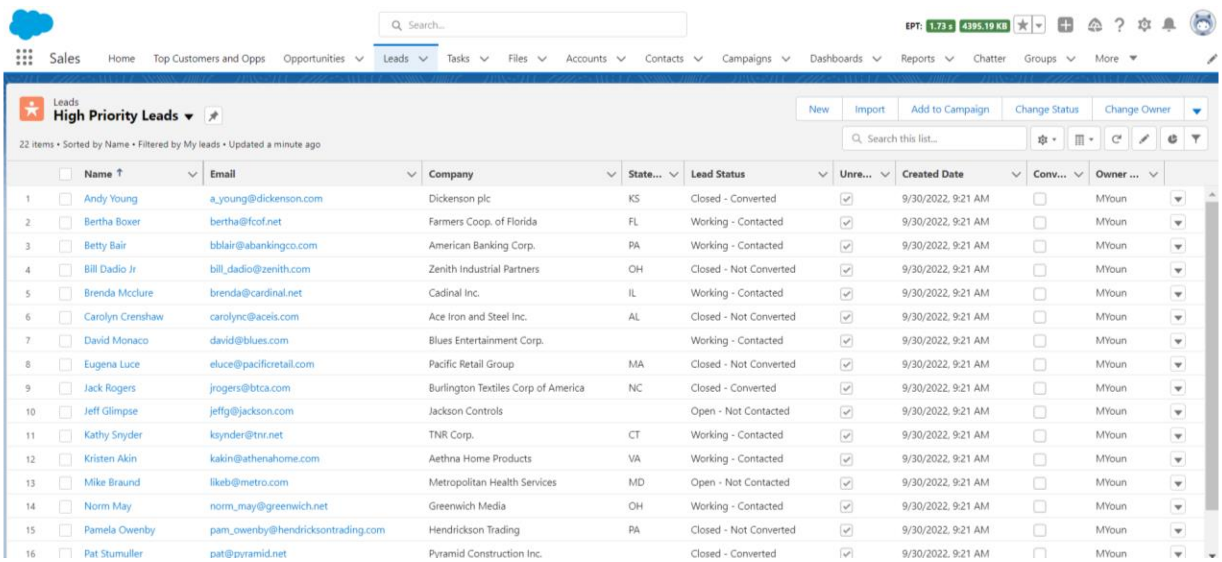
Click Select Fields to Display.

Move 1 or 2 fields from the Visible Fields to the Available Fields.

Click Save and notice that the fields you removed are no longer visible in this list.

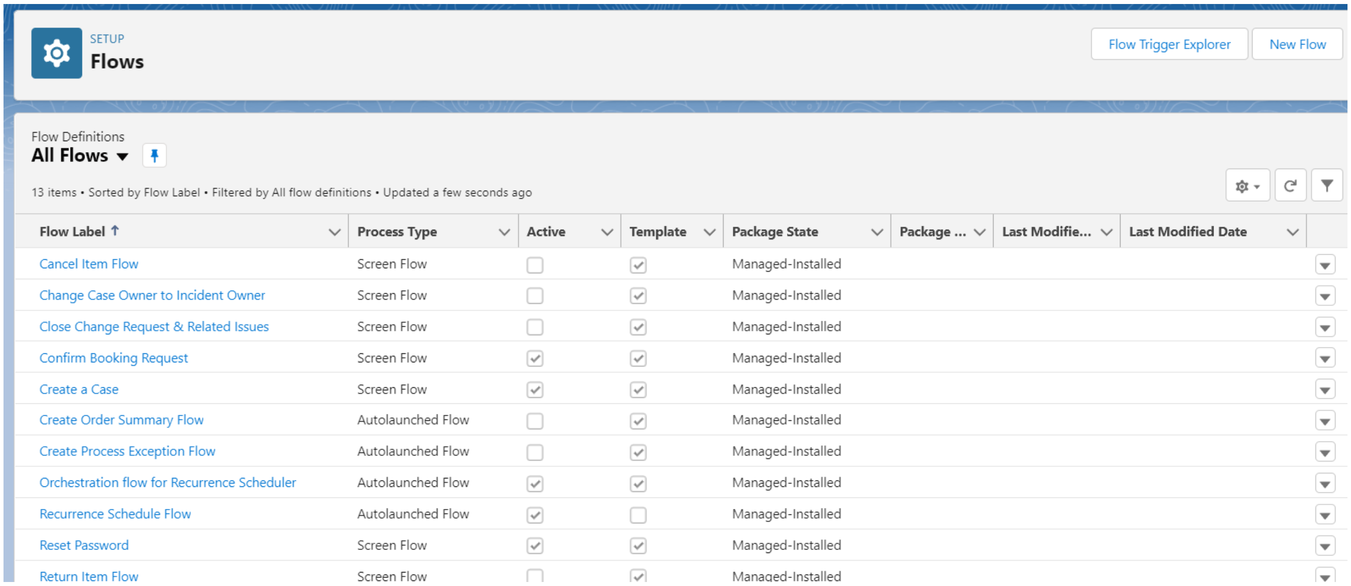



Sales
Home
Top Customers and Opps
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
More
Leads
High Priority Leads
22 items • Sorted by Name • Filtered by My leads • Updated 4 minutes ago
Select Fields to Display
Available Fields
Annual Revenue
City
Clean Status
Company D-U-N-S Number
Converted
Country
Visible Fields
Company
State/Province
Lead Status
Unread By Owner
Created Date
Owner Alias
Cancel
Save
Add to Campaign
Change Status
Change Owner
Name
Email
Unread...
Created Date
Owner Ali...
Andy Young
Bertha Boxer
Betty Bair
Bill Dadio Jr
Brenda Mcclure
Carolyn Crenshaw
David Monaco
Eugena Luce
Jack Rogers
Jeff Glimpse
Kathy Snyder
Kristen Akin
Mike Braund
Norm May
Pamela Owenby

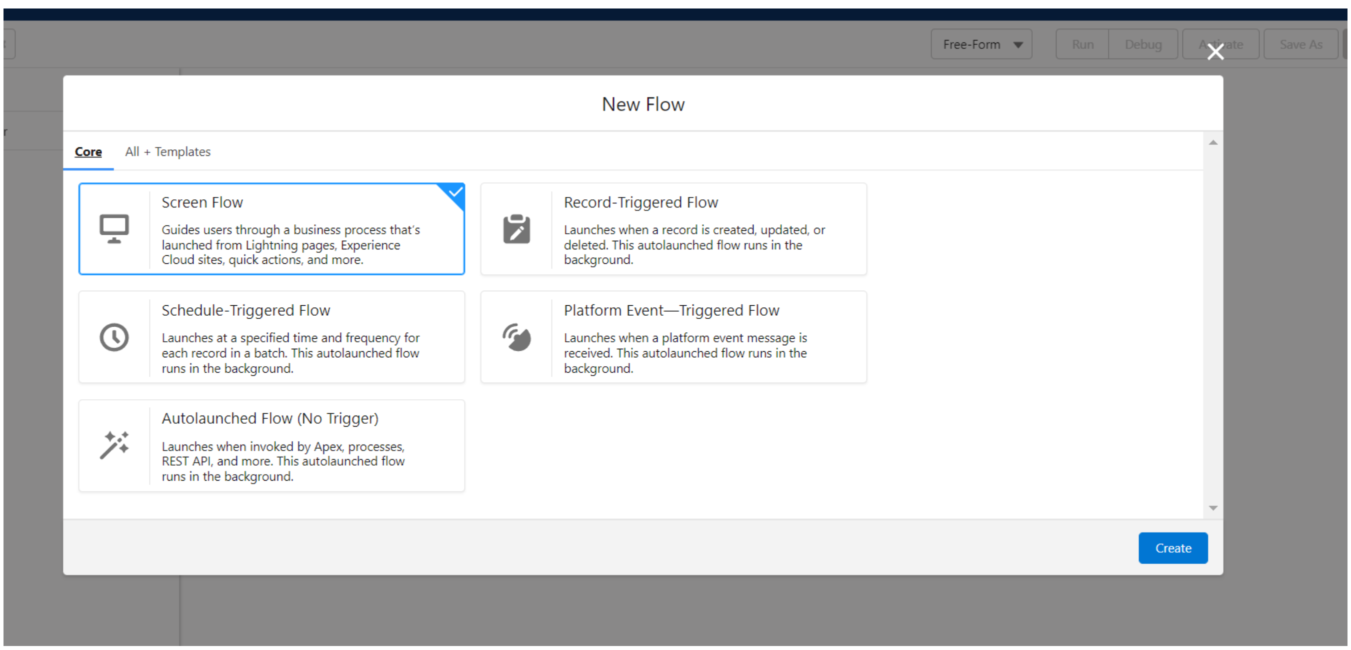

Sales
Home
Top Customers and Opps
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
More
Leads
High Priority Leads
22 items • Sorted by Name • Filtered by My leads • Updated a minute ago
New
Import
Add to Campaign
Change Status
Change Owner
Search this list...
Name
Email
Company
State...
Lead Status
Unre...
Created Date
Conv...
Owner ...
Andy Young a_young@dickenson.com Dickenson plc KS Closed - Converted 9/30/2022, 9:21 AM MYoun
Bertha Boxer bertha@fcof.net Farmers Coop. of Florida FL Working - Contacted 9/30/2022, 9:21 AM MYoun
Betty Bair bblair@abankingco.com American Banking Corp. PA Working - Contacted 9/30/2022, 9:21 AM MYoun
Bill Dadio Jr bill_dadio@zenith.com Zenith Industrial Partners OH Closed - Not Converted 9/30/2022, 9:21 AM MYoun
Brenda Mcclure brenda@cardinal.net Cadinal Inc. IL Working - Contacted 9/30/2022, 9:21 AM MYoun
Carolyn Crenshaw carolync@aceis.com Ace Iron and Steel Inc. AL Closed - Not Converted 9/30/2022, 9:21 AM MYoun
David Monaco david@blues.com Blues Entertainment Corp. Working - Contacted 9/30/2022, 9:21 AM MYoun
Eugena Luce eluce@pacificretail.com Pacific Retail Group MA Closed - Not Converted 9/30/2022, 9:21 AM MYoun
Jack Rogers jrogers@btca.com Burlington Textiles Corp of America NC Closed - Converted 9/30/2022, 9:21 AM MYoun
Jeff Glimpse jeffg@jackson.com Jackson Controls Open - Not Contacted 9/30/2022, 9:21 AM MYoun
Kathy Snyder ksynder@tnr.net TNR Corp. CT Working - Contacted 9/30/2022, 9:21 AM MYoun
Kristen Akin kakin@athenahome.com Aethna Home Products VA Working - Contacted 9/30/2022, 9:21 AM MYoun
Mike Braund likeb@metro.com Metropolitan Health Services MD Open - Not Contacted 9/30/2022, 9:21 AM MYoun
Norm May norm_may@greenwich.net Greenwich Media OH Working - Contacted 9/30/2022, 9:21 AM MYoun
Pamela Owenby pam_owenby@hendricksontrading.com Hendrickson Trading PA Closed - Not Converted 9/30/2022, 9:21 AM MYoun
Pat Stumuller pat@pyramid.net Pyramid Construction Inc. Closed - Converted 9/30/2022, 9:21 AM MYoun

Create a Timesheet Screen Flow

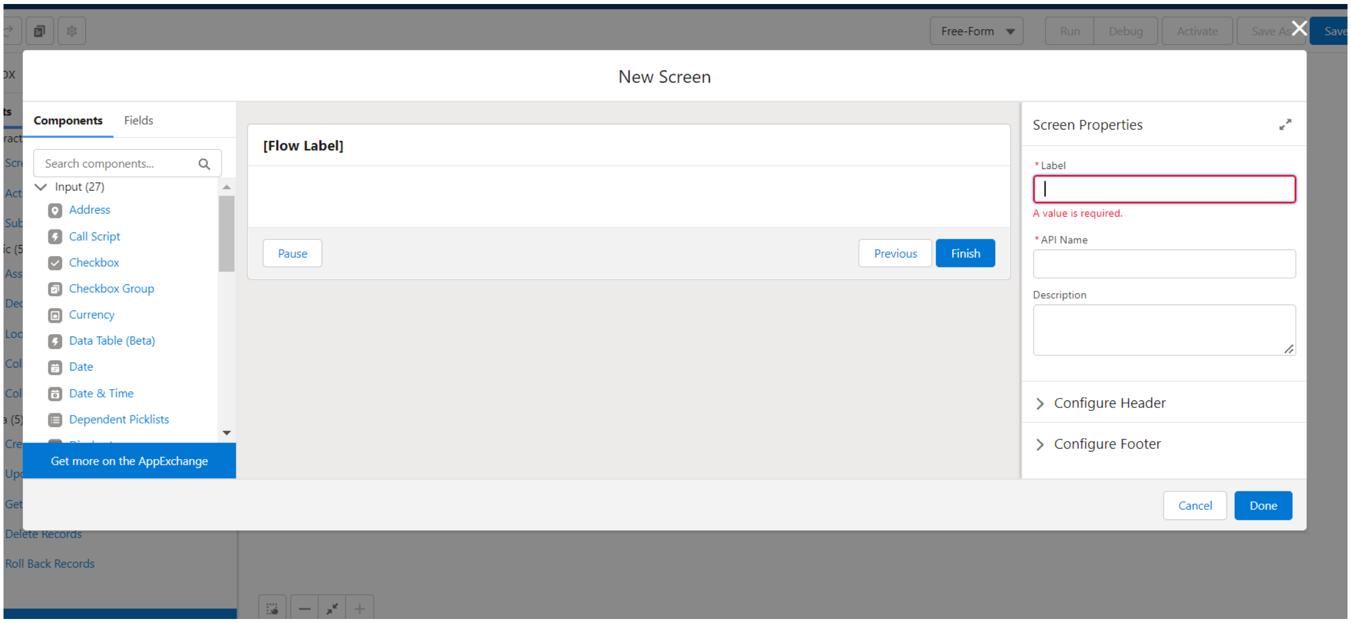
In Setup type Flows into quick find box -> Select Flows and Create a New Flow



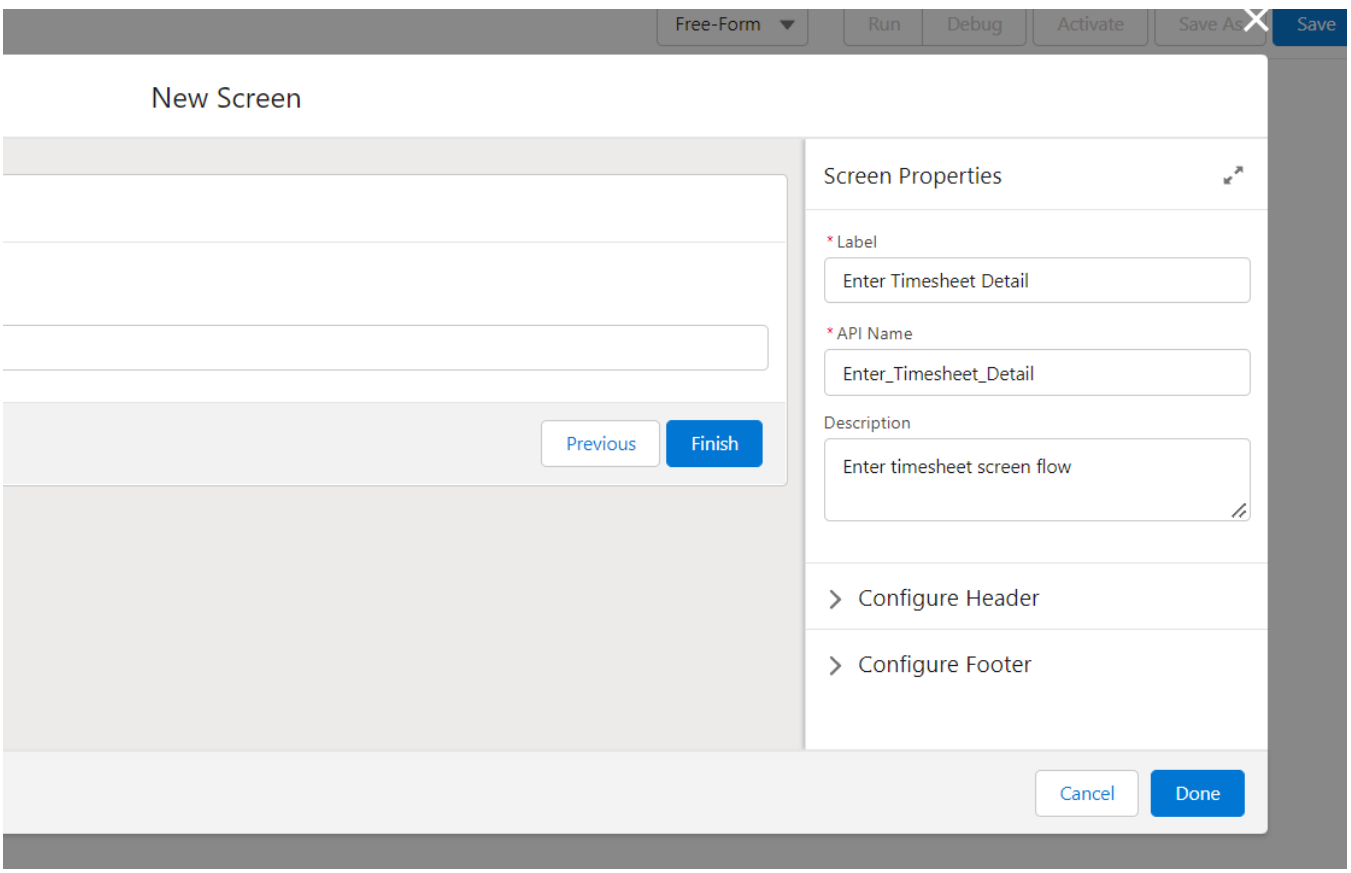
Select Screen Flow -> Click Next



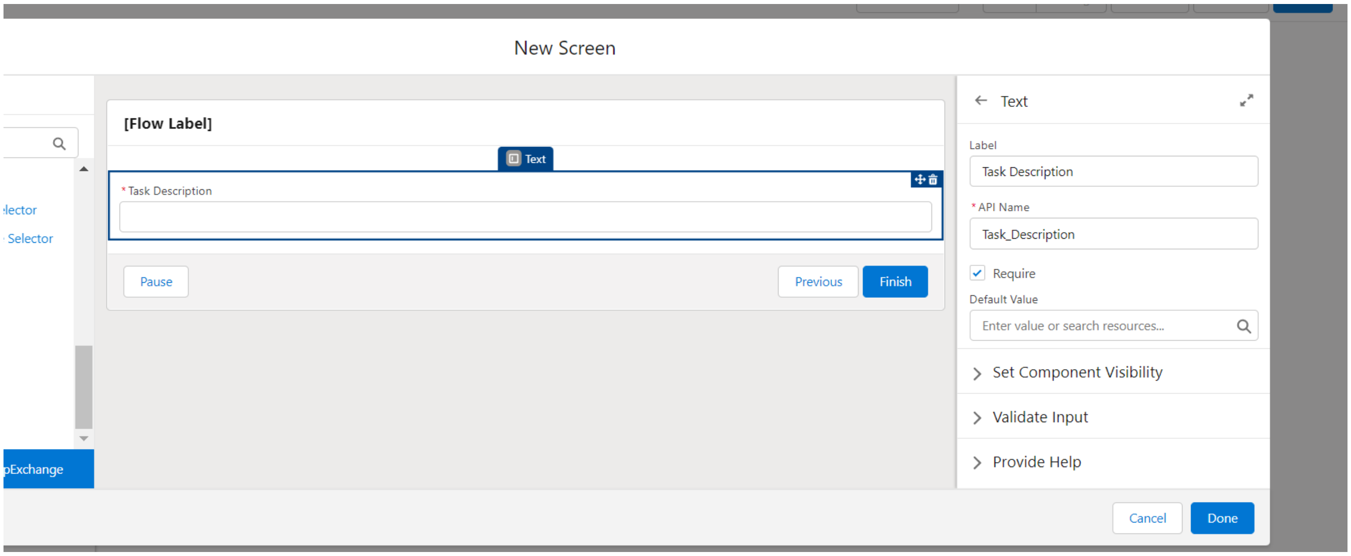
Click the drop –down and select Free Form -> Drag Screen from the side panel into the window



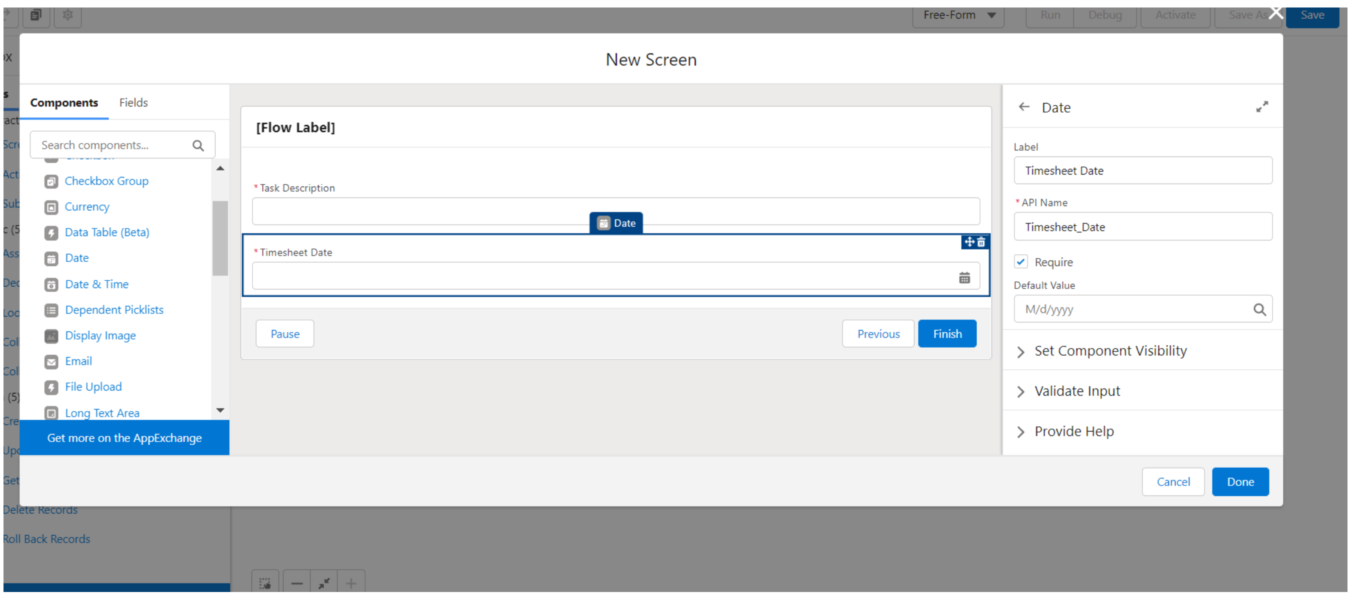
Fill in Screen properties -> Label is Enter Timesheet Detail, be sure to add a description



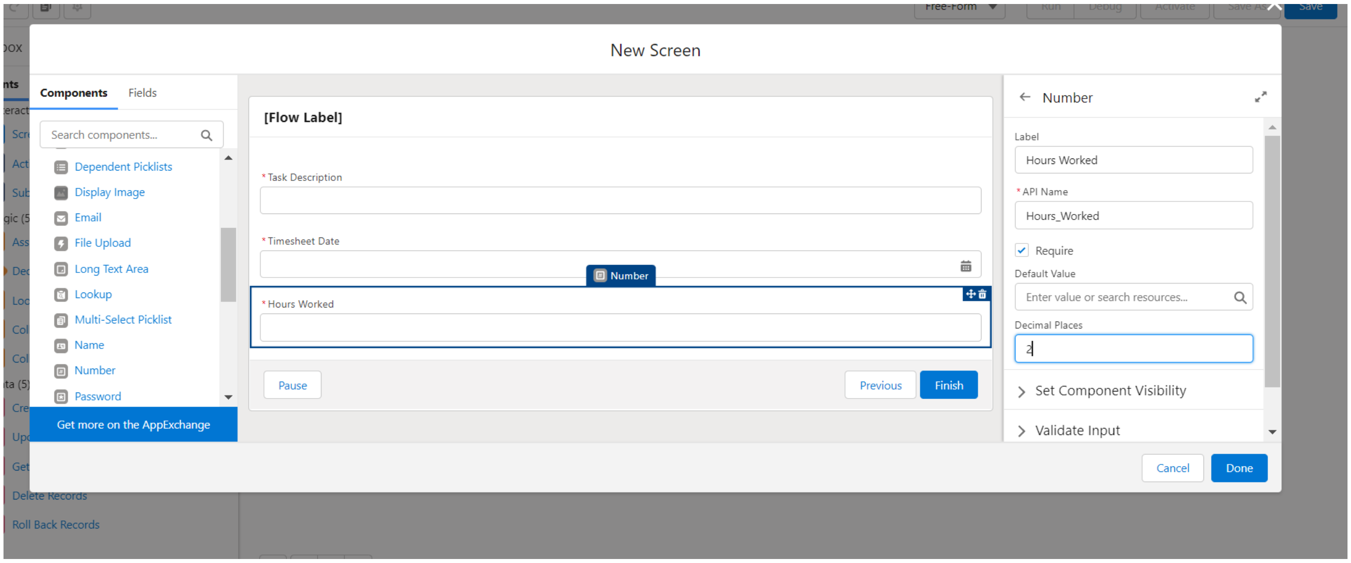
Next Drag and drop Text from the components panel into the Flow Label area -> Fill out Label as Task Description -> check the Required box



Drag and drop Date into the screen -> Label Timesheet Date -> Make it required



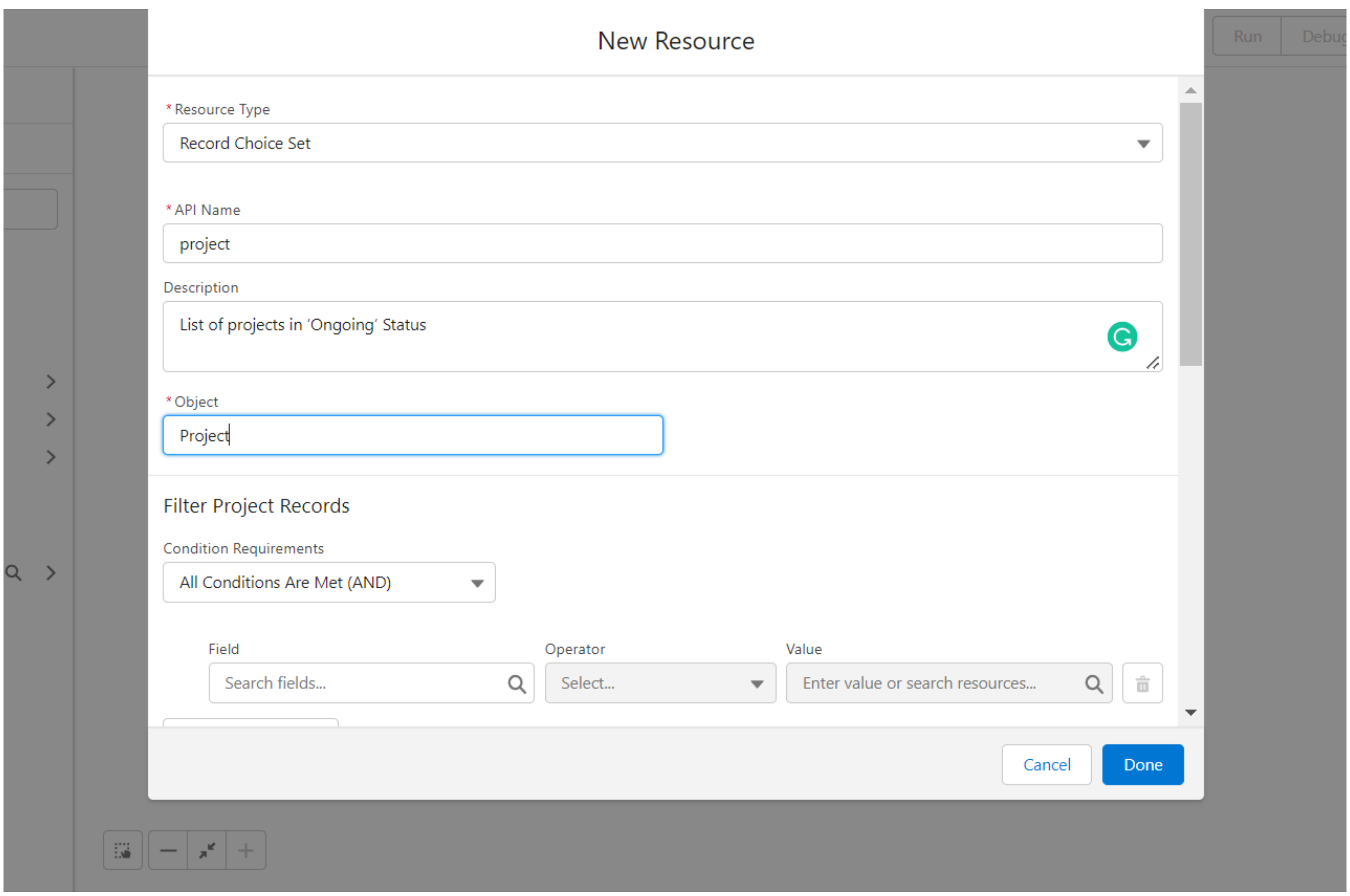
Next will be a Number so click number and add it to the screen -> Label it Hours Worked -> make it Required and add 2 decimal places



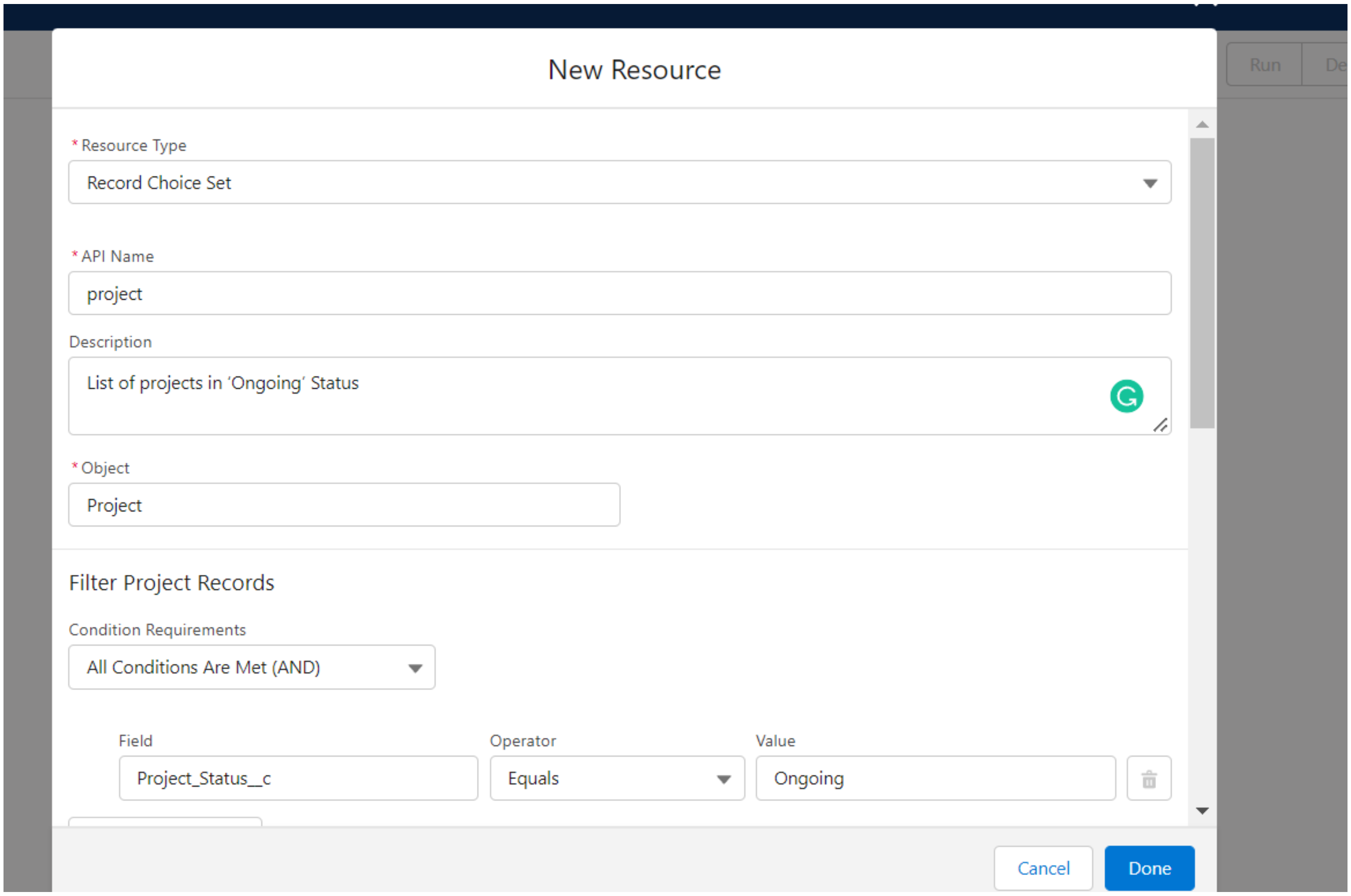
Click Done

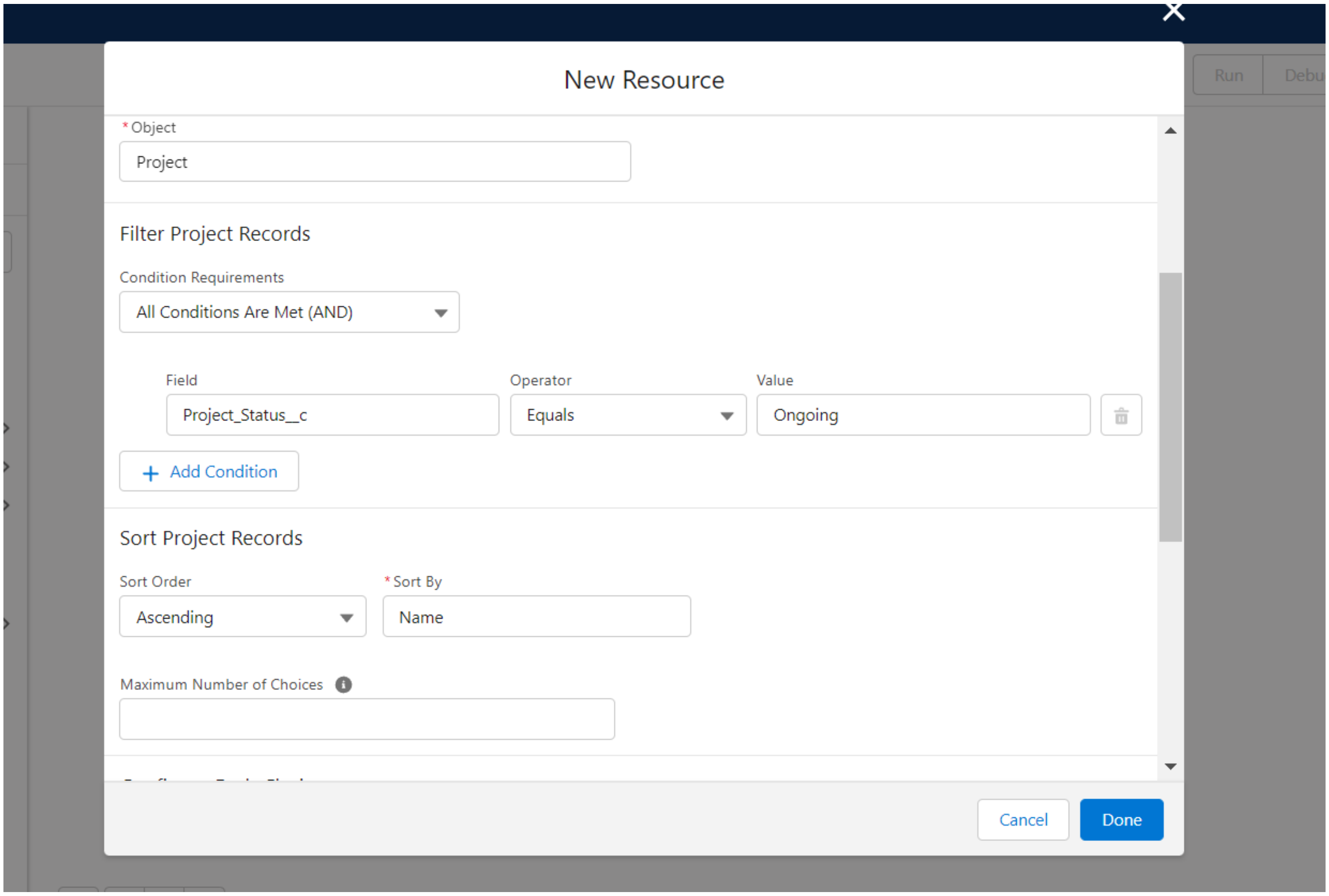
Now let's work on our Drop down menu

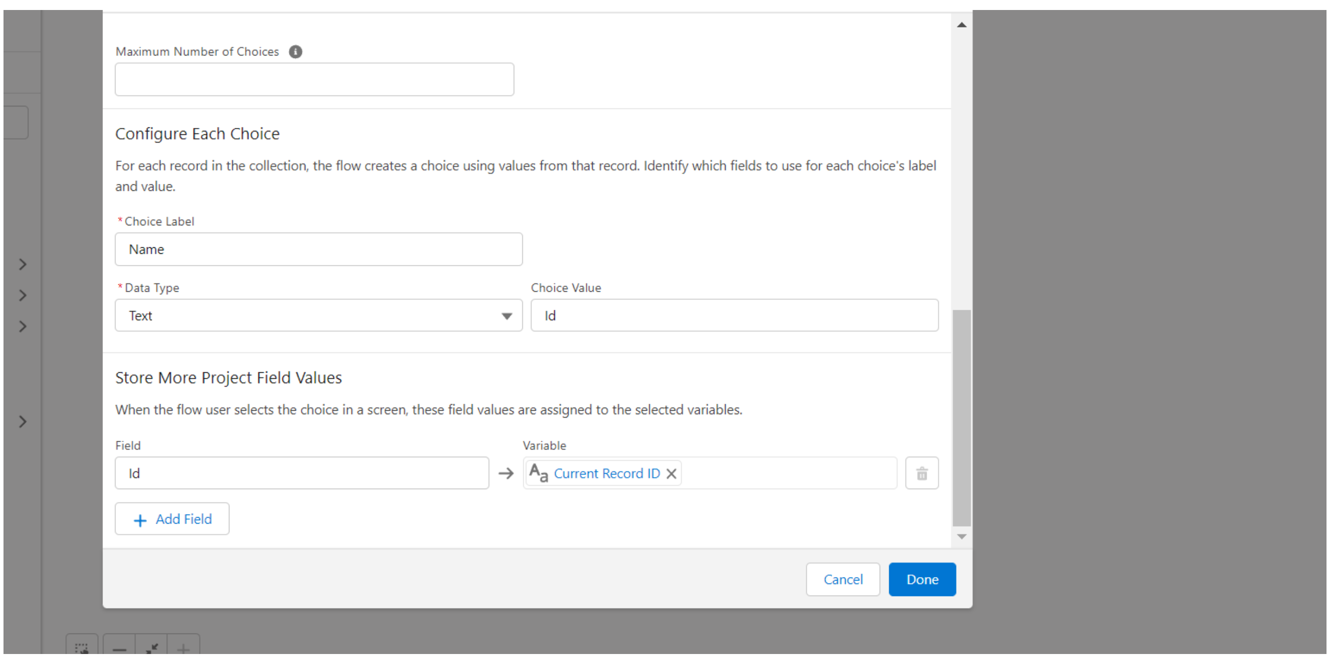
Go to Manager in side panel -> Click New Resource -> under Resource Type Select Record Choice Set -> Under API type Projects -> Description should be "List of projects in 'Ongoing' Status ->the object will be Project



Under Filter field select project status -> equals -> Ongoing -> sort list in ascending order by project name -> leave max number of choice blank -> choice label pull list of project names -> Data type is text -> Choice value is record ID -> Store Record ID -> variable click on Flow Global and select Current Record -> Click done

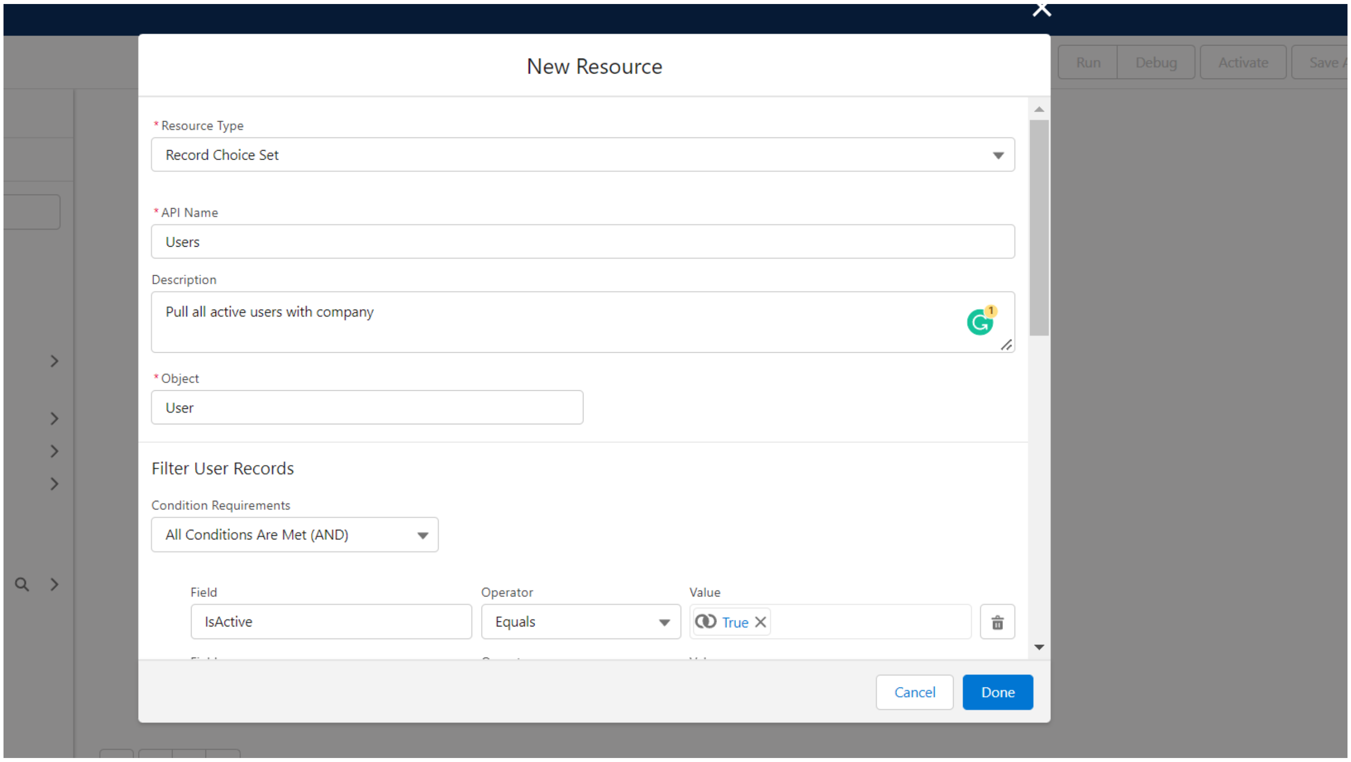


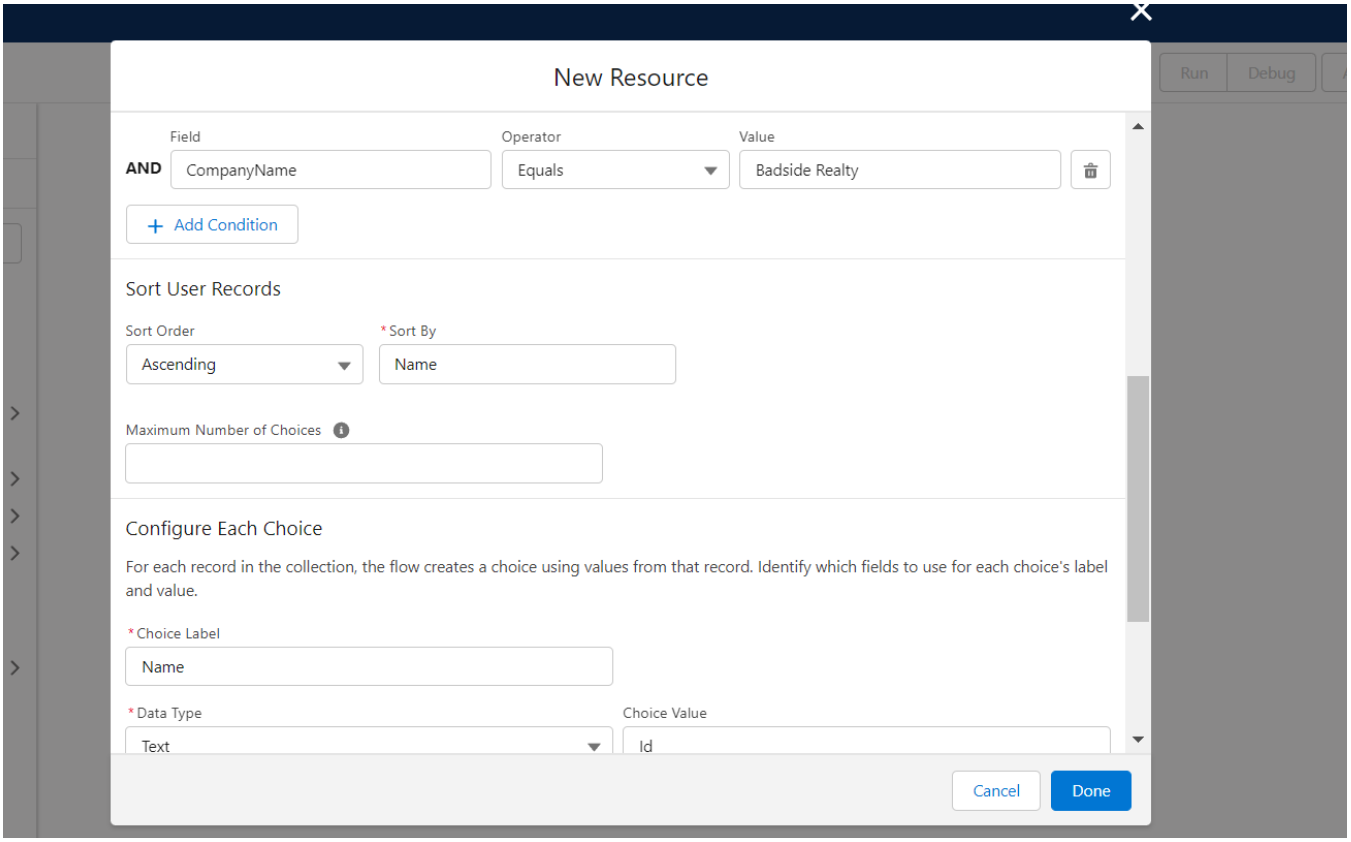


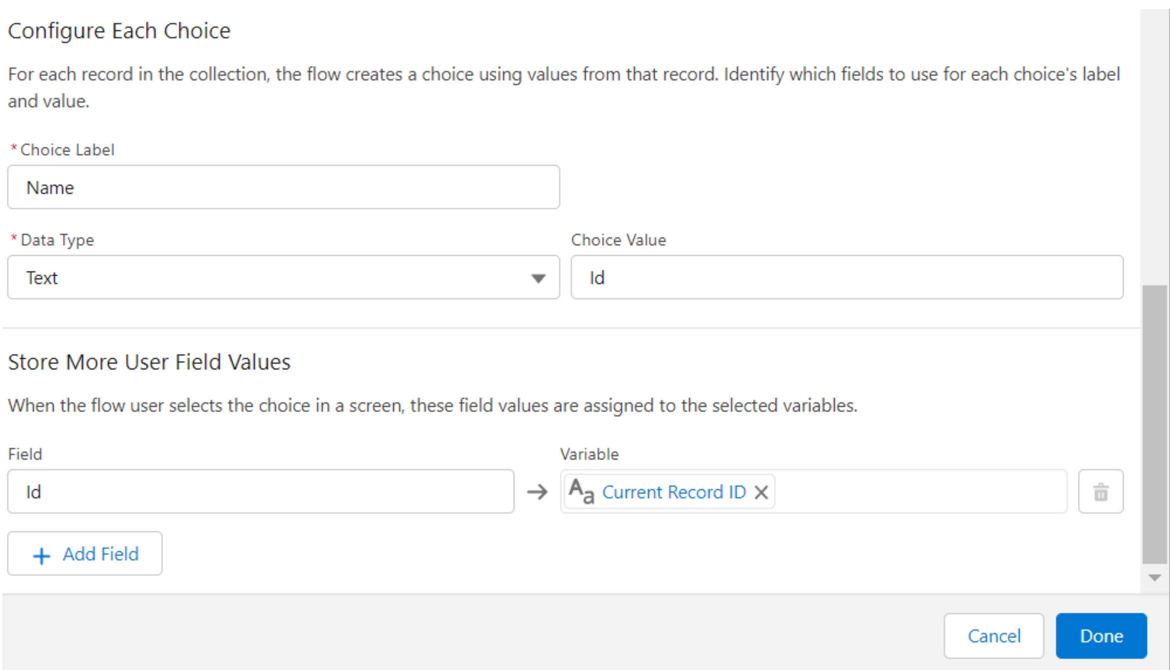


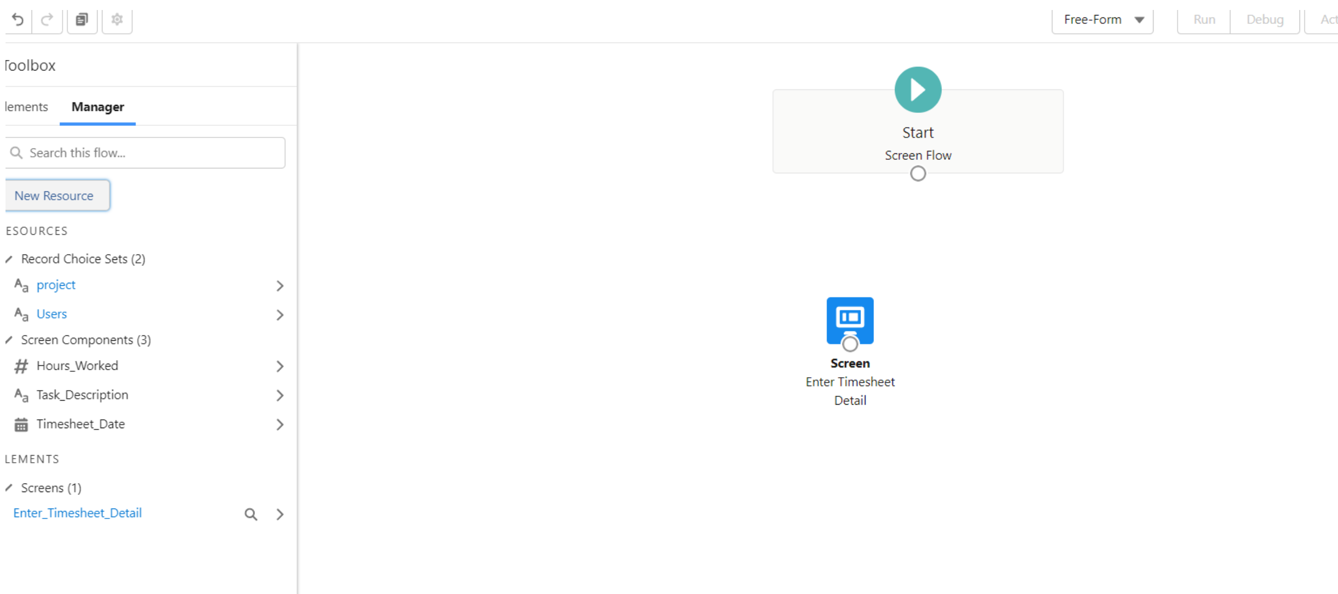
Now click New resource again -> Record Choice Set -> API Name Users -> Description "Pull all active users with company" -> User Object -> under Filters select isActive – Equals – GlobalConstantTrue -> add a condition -> Company Name – equals – 'your company name' ->

Sort in Ascending order -> by Name (Full Name) -> leave Max choices blank -> Choose label Name (Full Name) -> Type Text -> Choice Value User ID -> Store User id -> Variable click Global variable and select Current Record -> Done

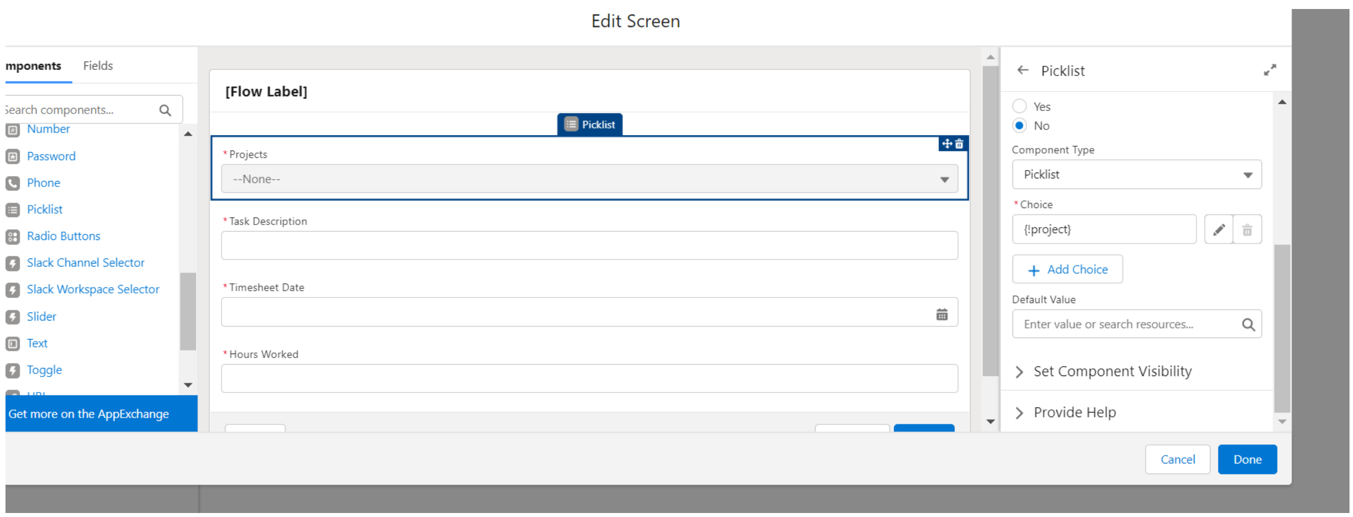



New Resource
Run
Debug
Field
Operator
Value
AND
CompanyName
Equals
Badside Realty
Add Condition
Sort User Records
Sort Order
* Sort By
Ascending
Name
Maximum Number of Choices
Configure Each Choice
For each record in the collection, the flow creates a choice using values from that record. Identify which fields to use for each choice's label and value.
* Choice Label
Name
* Data Type
Choice Value
Text
Id
Cancel
Done

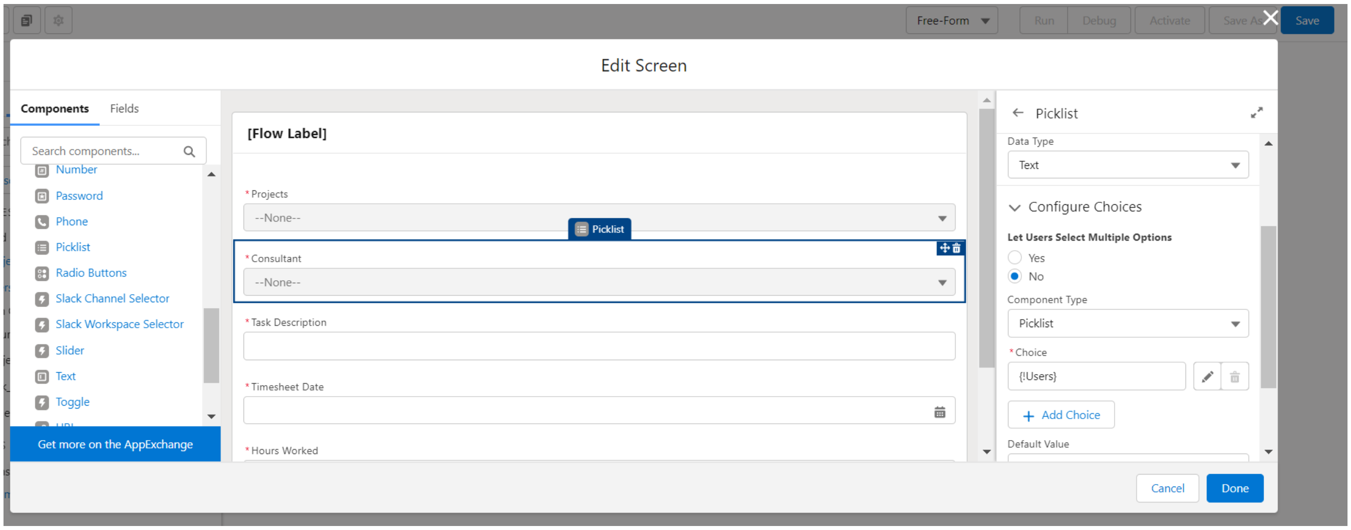

Configure Each Choice
For each record in the collection, the flow creates a choice using values from that record. Identify which fields to use for each choice's label and value.
* Choice Label
Name
* Data Type
Choice Value
Text
Id
Store More User Field Values
When the flow user selects the choice in a screen, these field values are assigned to the selected variables.
Field
Variable
Id
Current Record ID
Add Field
Cancel
Done



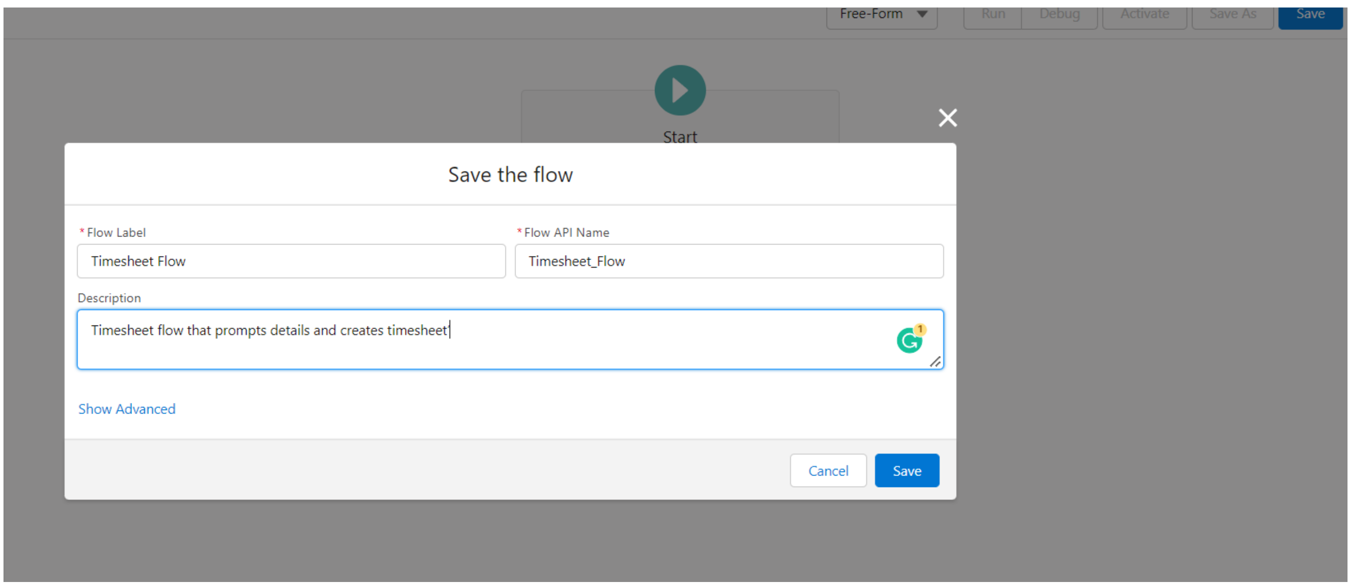
Double the screen-> Add Picklist above task Description field -> Label it Projects -> Data Type is Text -> no Default value -> Choice is Projects -> Done



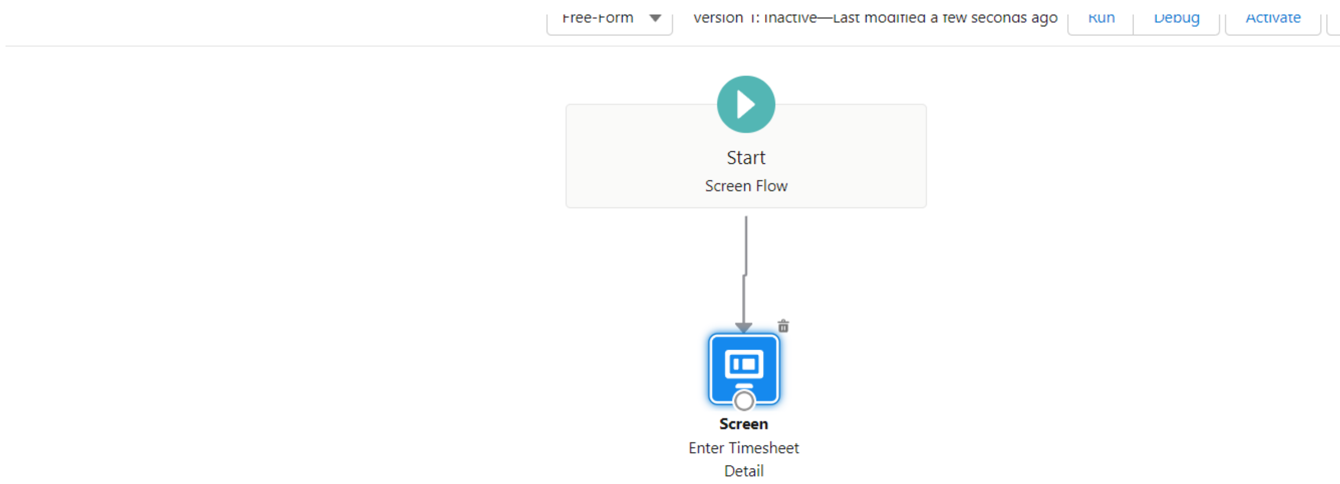
Add another Picklist add under Projects field -> Label it Consultant -> Data Type is Text -> no Default value -> Choice is Users -> Done



Click Save -> Label it Timesheet Flow -> Description 'Timesheet flow that prompts details and creates timesheet'- > Click Save



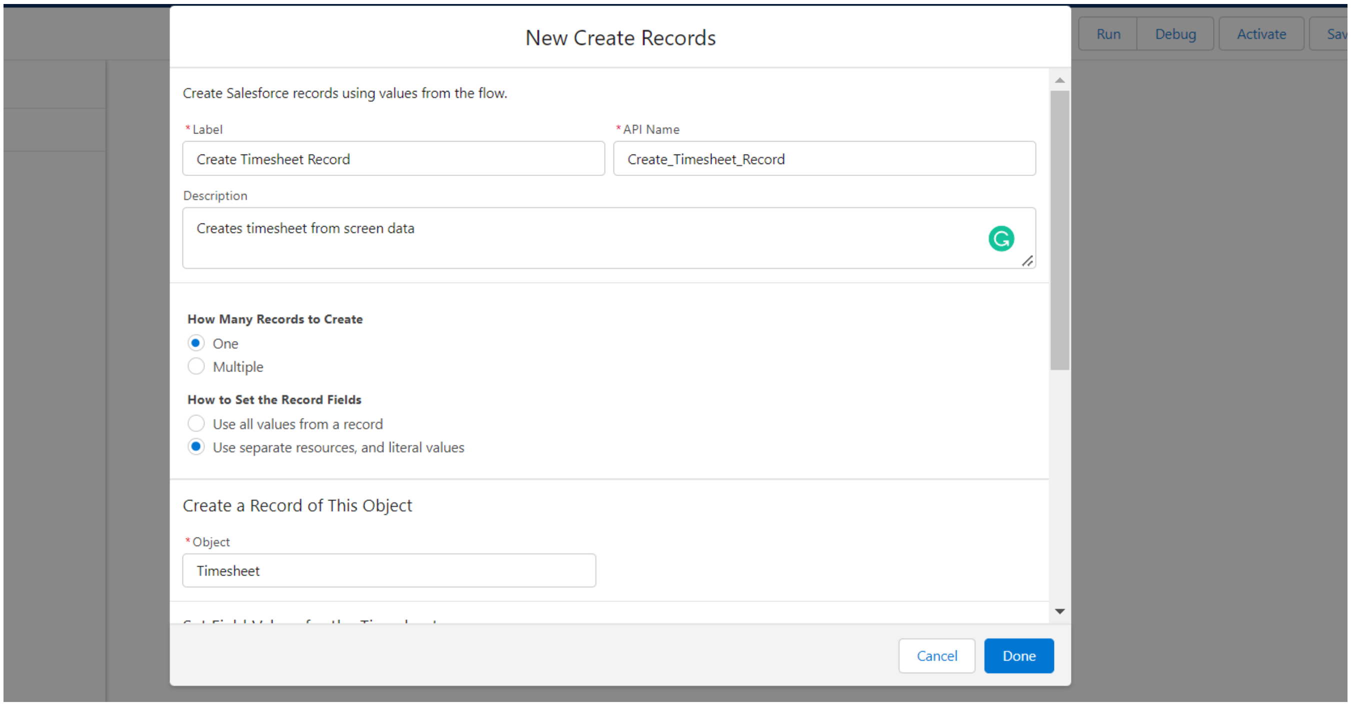
Now you need to connect the screen flow to activate it. Select the circle under Start and connect it to the circle on Screen and click Save.

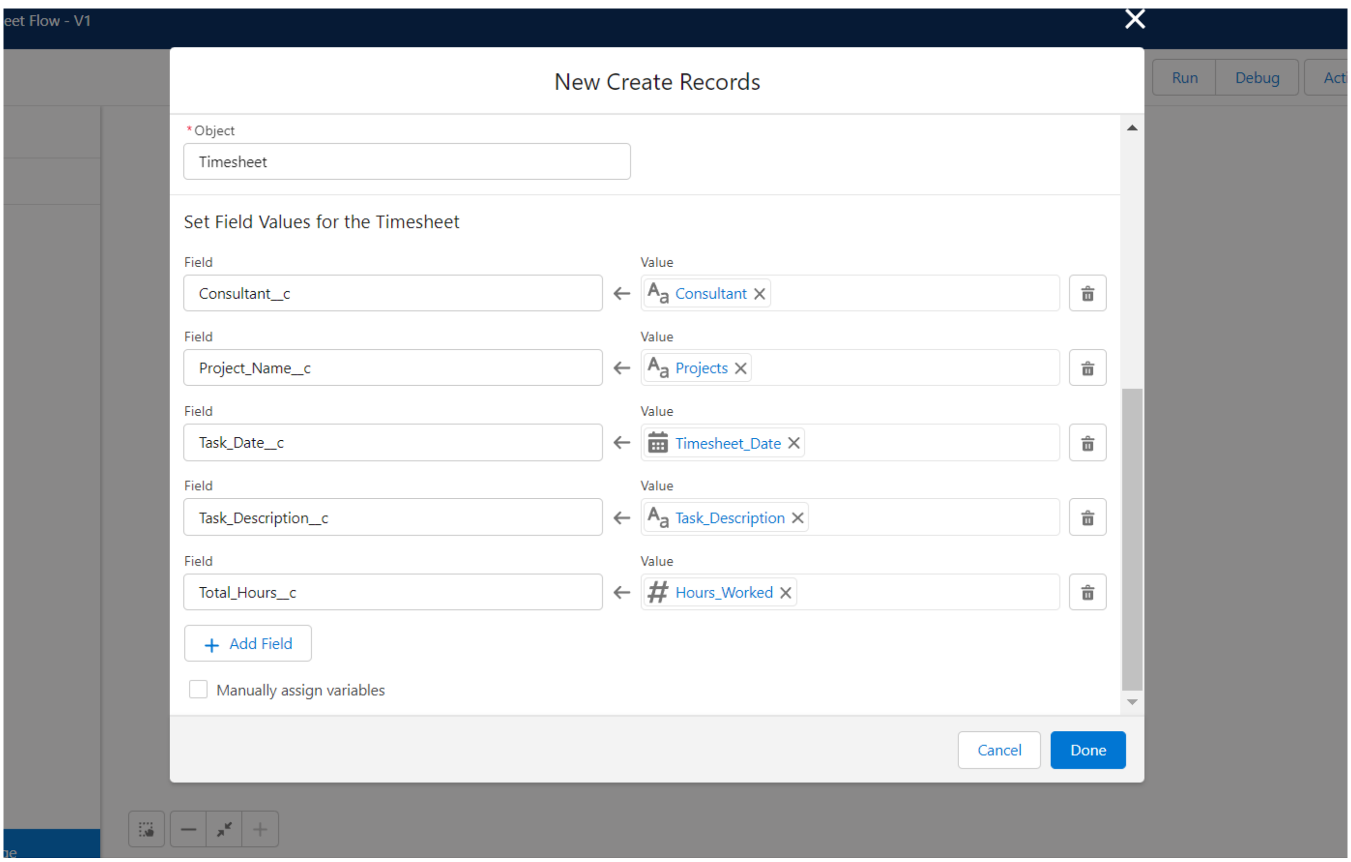


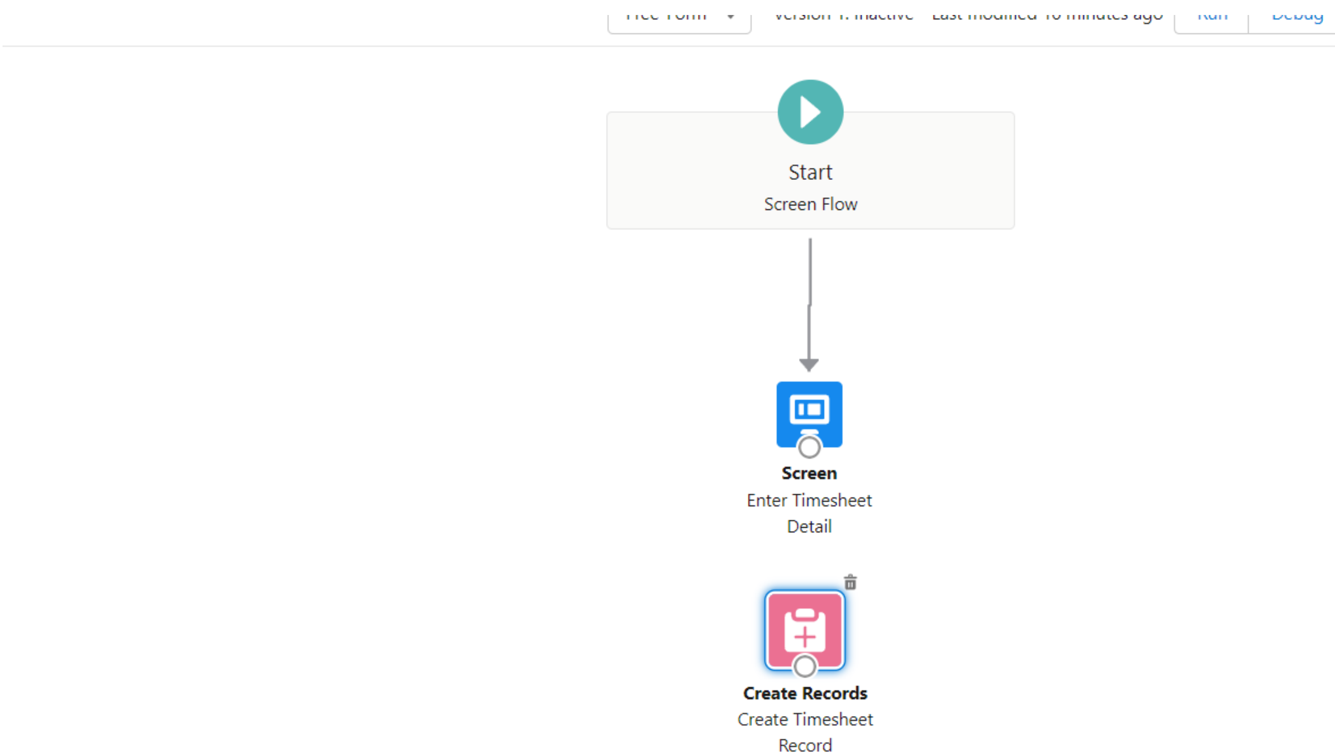
Click Run to see what you have in the fields

Now lets create a Record

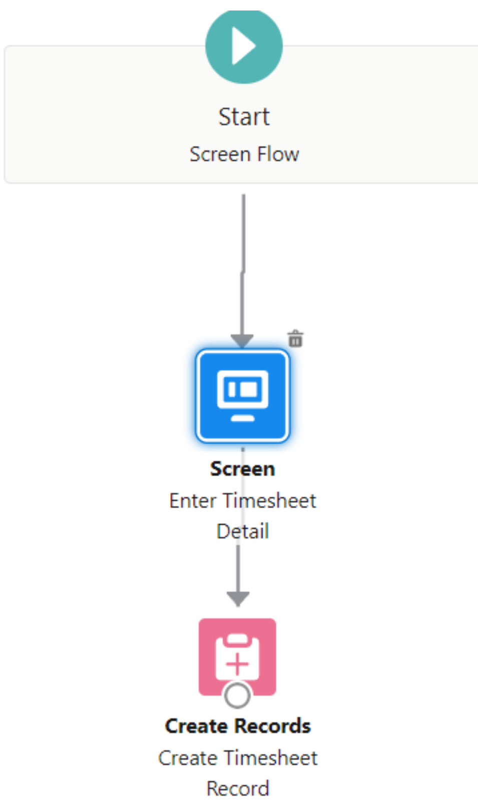
Go to Elements on the toolbar and select Create A Record-> Label it Create Timesheet record -> Description 'Creates timesheet from screen data' -> How Many records Only One -> How do we want to set the Fields, Use separate resources, and literal values. Object is Timesheet -> Field one is Consultant Value is Consultant Picklist -> Add a field -> Project Name, Value Project Picklist -> Add a Field, Task Date Value is Timesheet Date -> Add a Field, Task description and Value is Task Description -> Add a Field Total Hours and value is Hours Worked -> Click Done


New Create Records
Create Salesforce records using values from the flow.
*Label
Create Timesheet Record
*API Name
Create_Timesheet_Record
Description
Creates timesheet from screen data
How Many Records to Create
One
Multiple
How to Set the Record Fields
Use all values from a record
Use separate resources, and literal values
Create a Record of This Object
*Object
Timesheet
Run
Debug
Activate
Cancel
Done


New Create Records
*Object
Timesheet
Set Field Values for the Timesheet
Field
Consultant__c
Value
Consultant
Field
Project_Name__c
Value
Projects
Field
Task_Date__c
Value
Timesheet_Date
Field
Task_Description__c
Value
Task_Description
Field
Total_Hours__c
Value
Hours_Worked
Add Field
Manually assign variables
Run
Debug
Cancel
Done

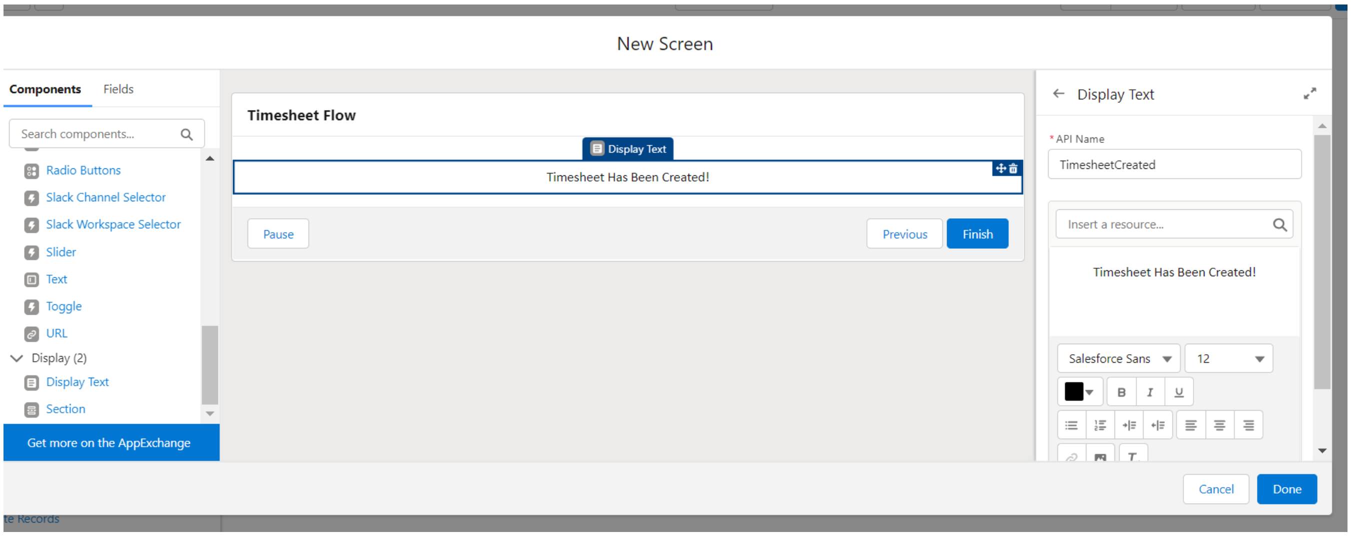


Now let's connect them. Drag the circle from the Screen element to the circle on the Create records element

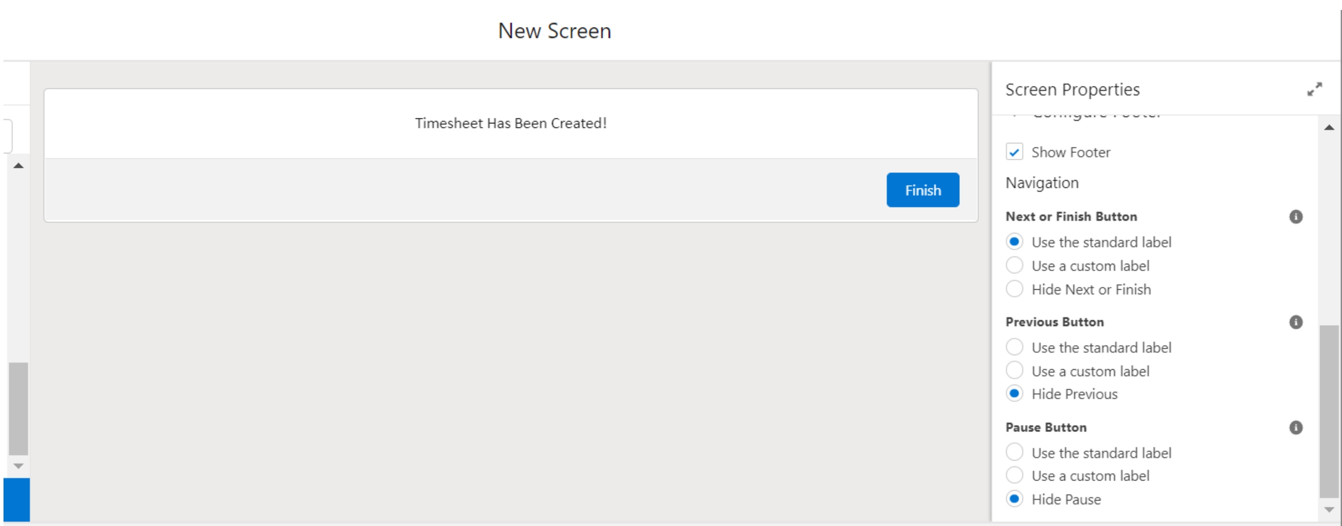


Last Component is another screen component which will be the confirmation that the timesheet was created.

Drag and drop a Screen component into the window -> Add Display text -> Label it TimesheetCreated -> Add the message "Timesheet Has Been Created!"

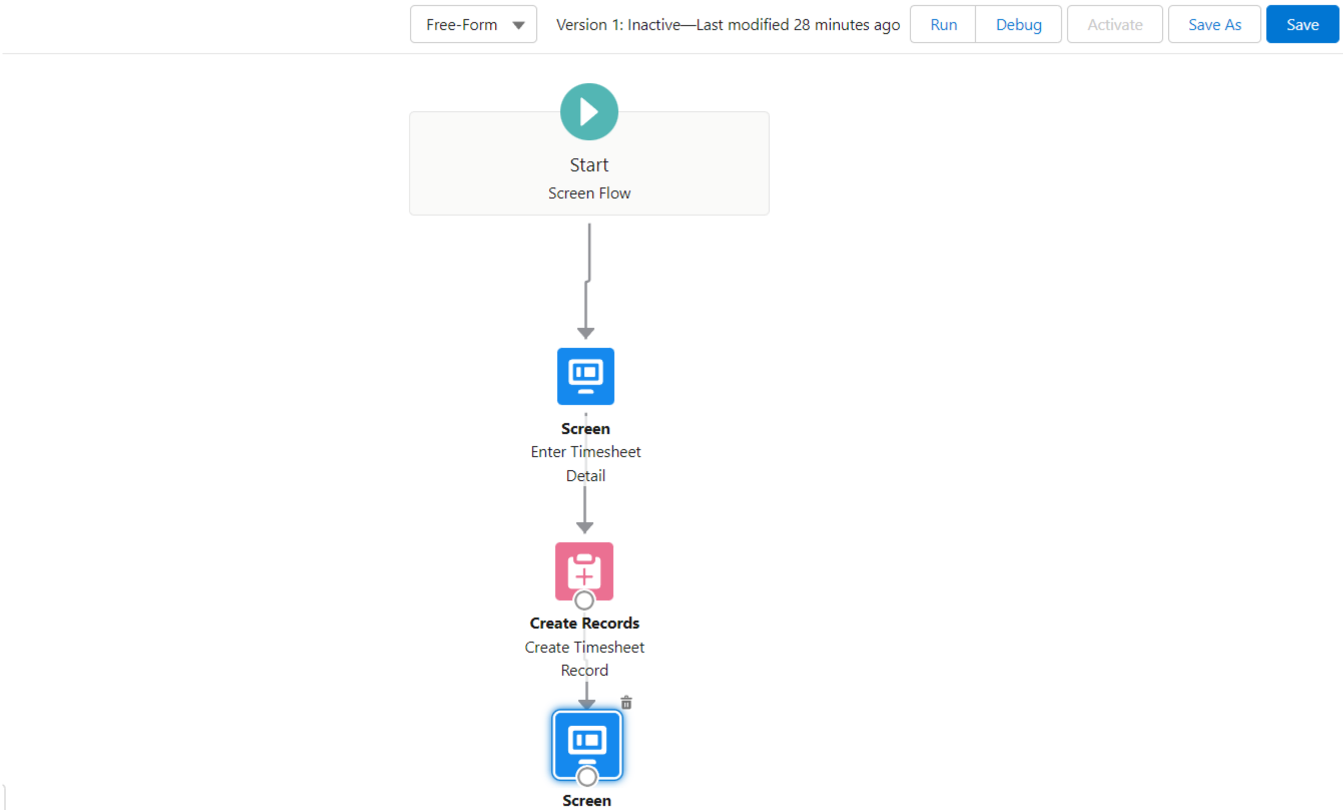


Under Screen Properties label it Timesheet Created and hide the Header -> Select Navigation and Hide Previous and Hide Pause -> Click Done



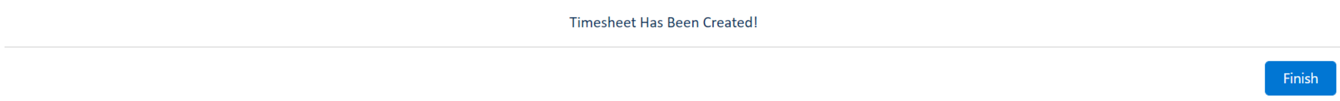
Click Done

Link the Create Records to Timesheet Created and Run to test it out

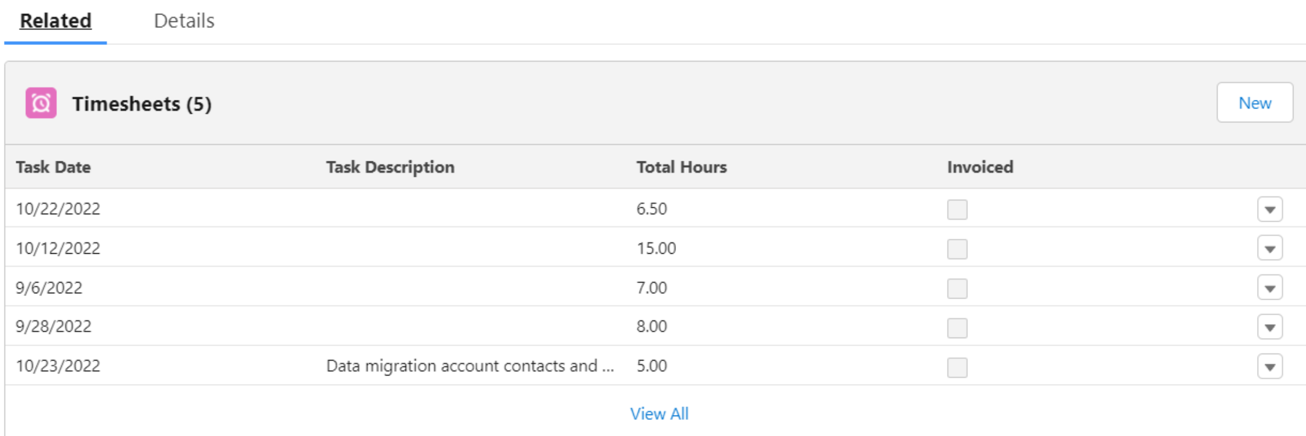

Free-Form
Version 1: Inactive—Last modified 28 minutes ago
Run
Debug
Activate
Save As
Save
Start
Screen Flow
Screen
Enter Timesheet Detail
Create Records
Create Timesheet Record
Screen


Timesheet Flow
* Projects
--None--
* Consultant
--None--
* Task Description
* Timesheet Date
* Hours Worked
Next


Timesheet Flow
* Projects
First Project
* Consultant
Mica Ashburne
* Task Description
Data migration account contacts and opportunities
* Timesheet Date
Oct 23, 2022
* Hours Worked
5.00
Next



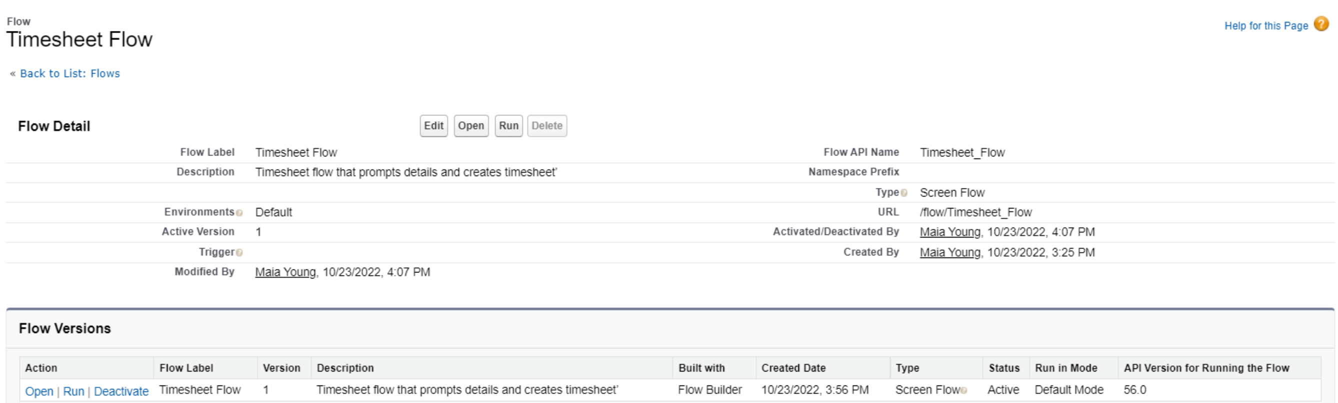
Access your project management app to see if the record was created



Task Date	Task Description	Total Hours	Invoiced
10/22/2022		6.50	
10/12/2022		15.00	
9/6/2022		7.00	
9/28/2022		8.00	
10/23/2022	Data migration account contacts and ...	5.00	

Now we want to add our timesheet record onto the homepage of our sales app. You need to activate your flow.

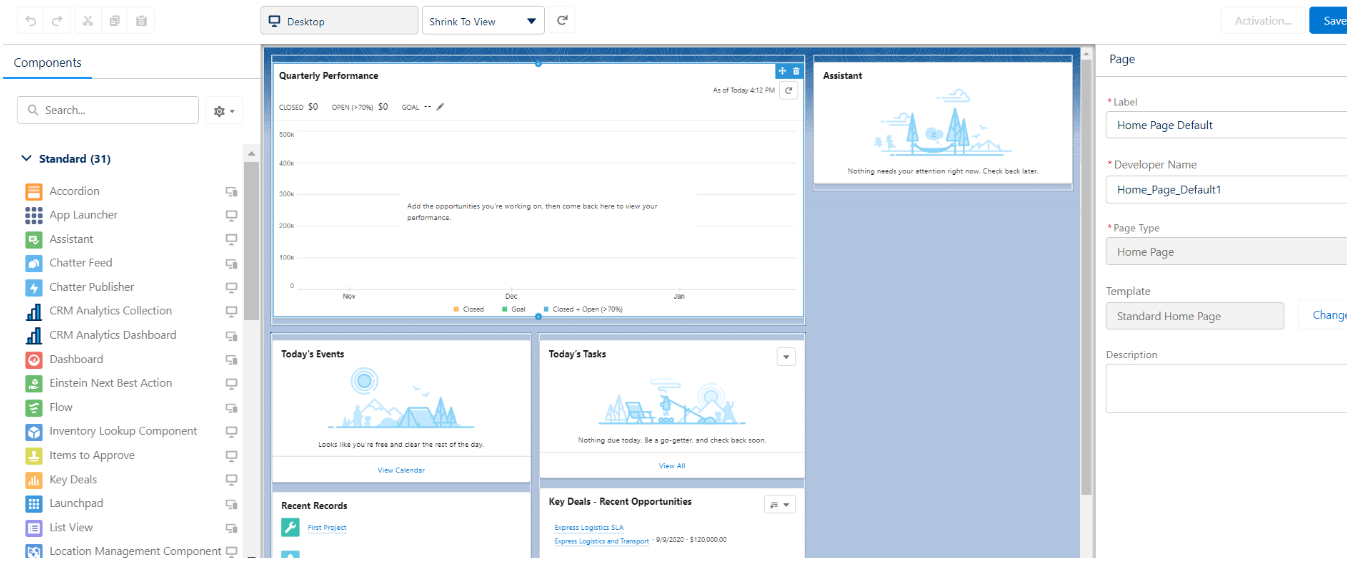
Go to Setup and type in Flows -> select your Timesheet Flow and select activate



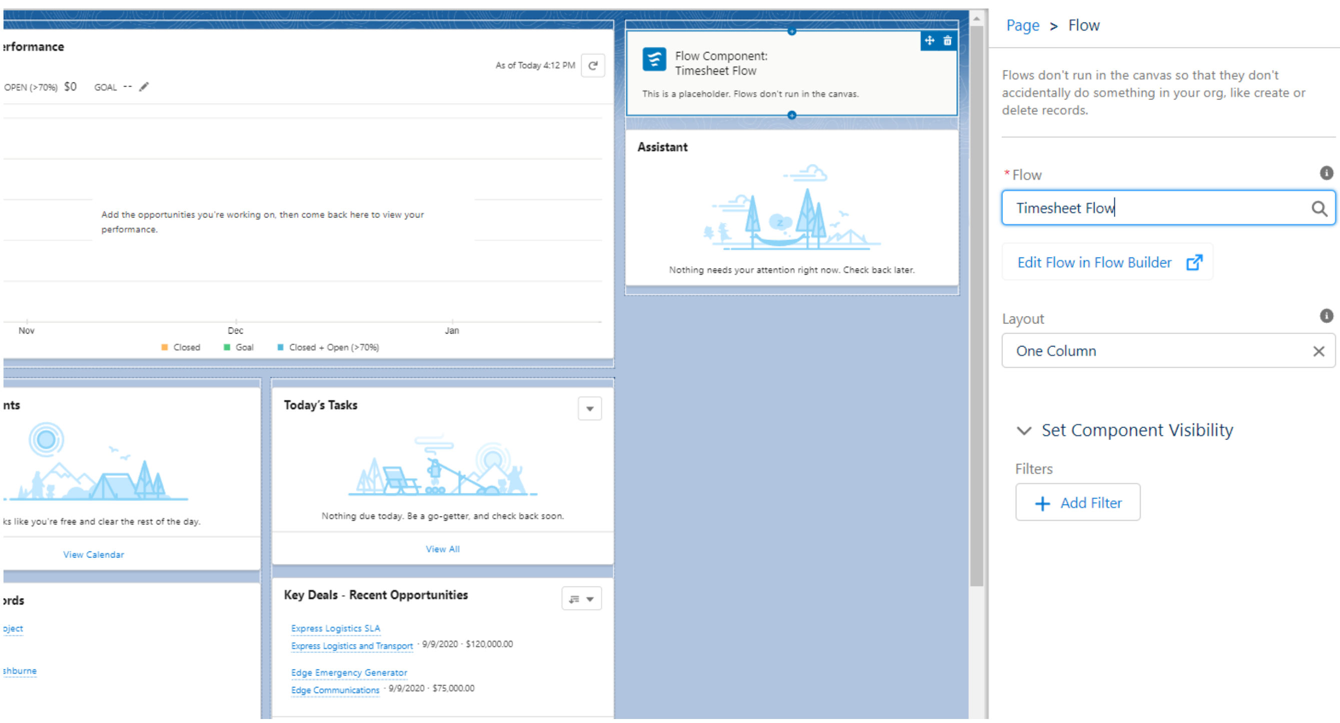
Flow Label	Timesheet Flow	Flow API Name	Timesheet_Flow
Description	Timesheet flow that prompts details and creates timesheet'	Namespace Prefix	
		Type	Screen Flow
Environments	Default	URL	/flow/Timesheet_Flow
Active Version	1	Activated/Deactivated By	Maia Young, 10/23/2022, 4:07 PM
Trigger		Created By	Maia Young, 10/23/2022, 3:25 PM
Modified By	Maia Young, 10/23/2022, 4:07 PM		

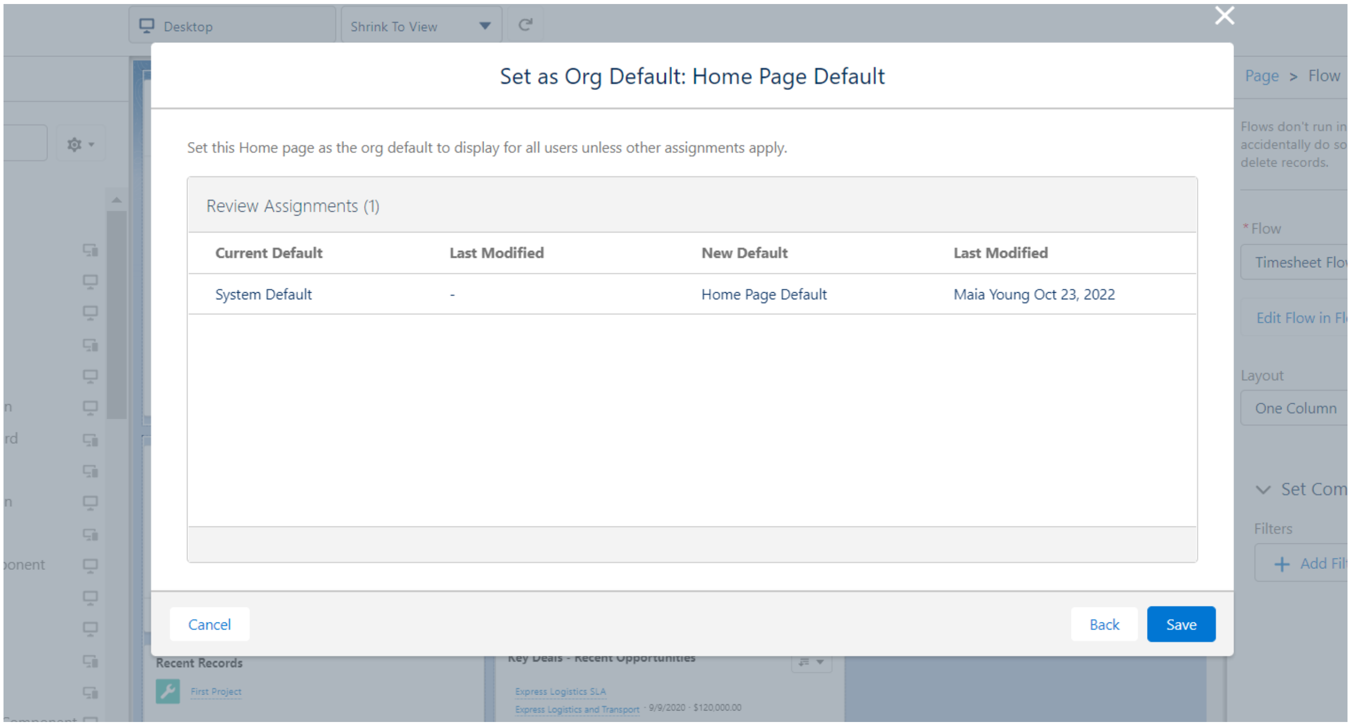
Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Run in Mode	API Version for Running the Flow
Open | Run | Deactivate	Timesheet Flow	1	Timesheet flow that prompts details and creates timesheet'	Flow Builder	10/23/2022, 3:56 PM	Screen Flow	Active	Default Mode	56.0

Now go to your Sales app -> click the gear icon and select Edit Page -> Add Flow above Assistant

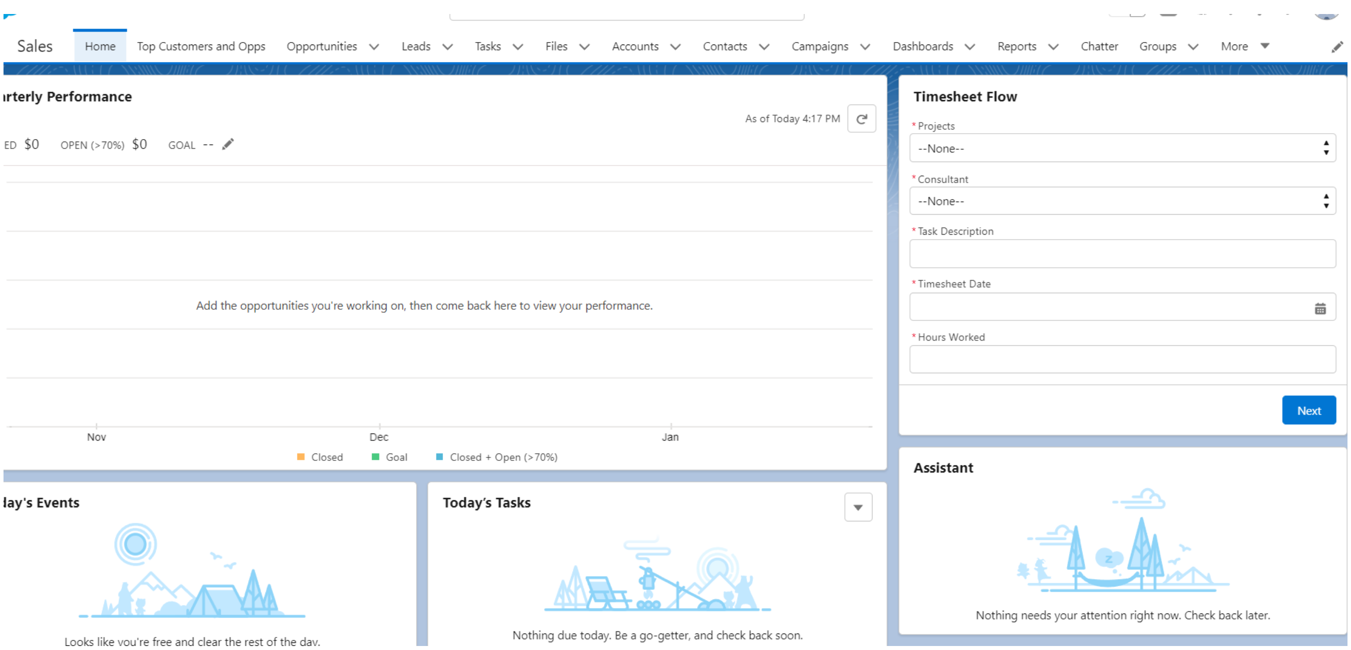


Select Timesheet Flow under Flow in right panel -> Click Save -> Activate > Assign as Org Default -> Save





Go back to your homepage and you should see your Flow



Congrats! You have a fully functioning Project Management App!