

PROJECT MANAGEMENT EXPRESS



2023

INNOVATIVE & COLLABORATIVE

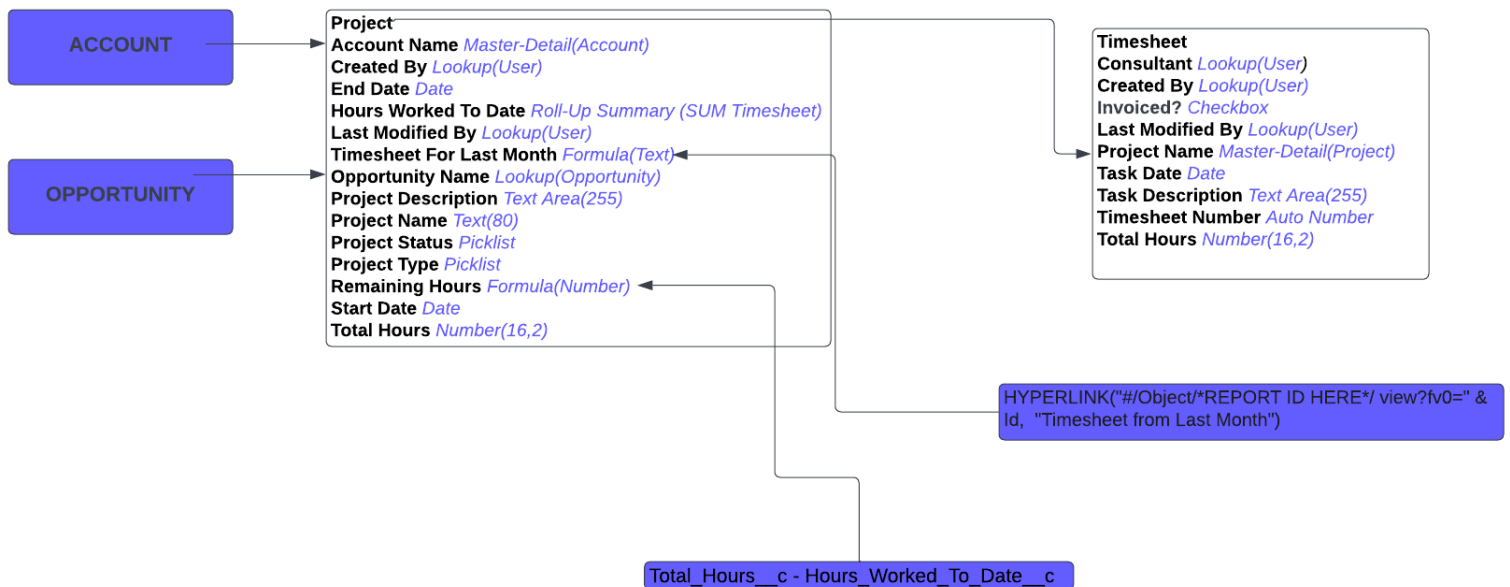
MAIA YOUNG

Contents

App Outline and Data Model	1
Objects & Fields	2
Custom Objects	10
Object Page Layout	15
Report Type	19
Create a Report	20
Create Lightning App	26
Custom Email Template	32
Validation Rules	34
Workflow Rules & Email Notification	35
Import Data	38
Create a Profile	42
Create a User	44
List view Customization	48
Create a Screen Flow	51

App Outline

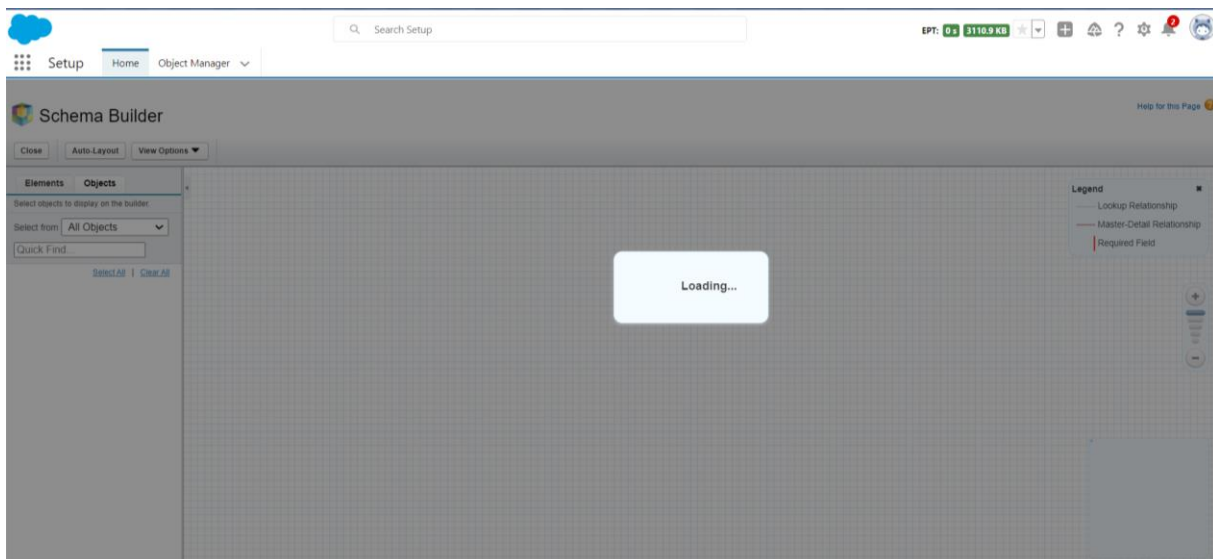
PROJECT MANAGMENT APP Entity Relationship Diagram



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.

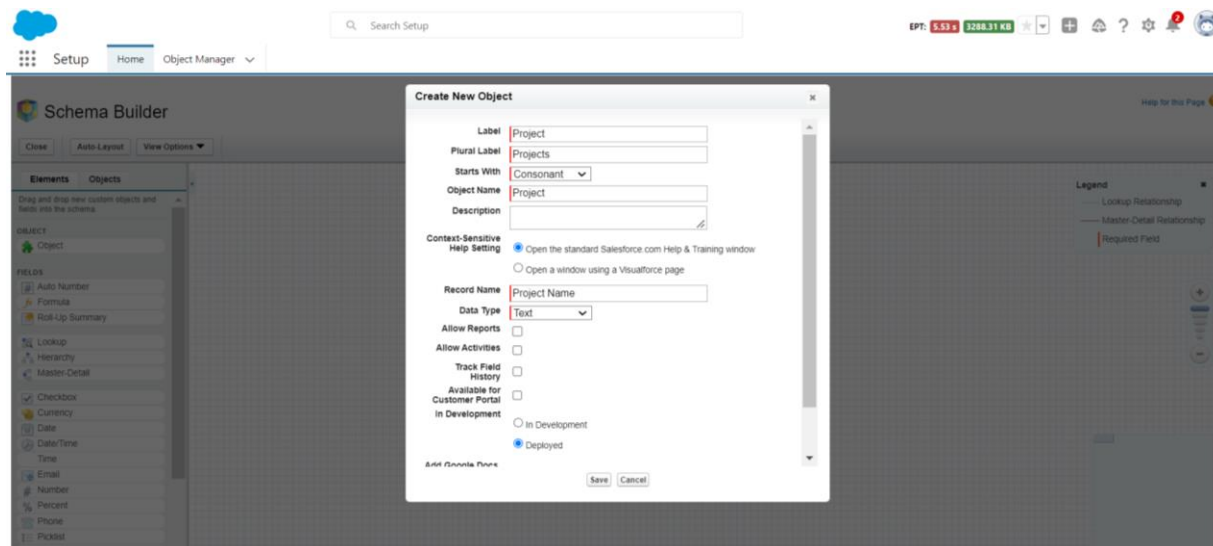
Create Objects and Fields

Search Schema Builder in Quick Find

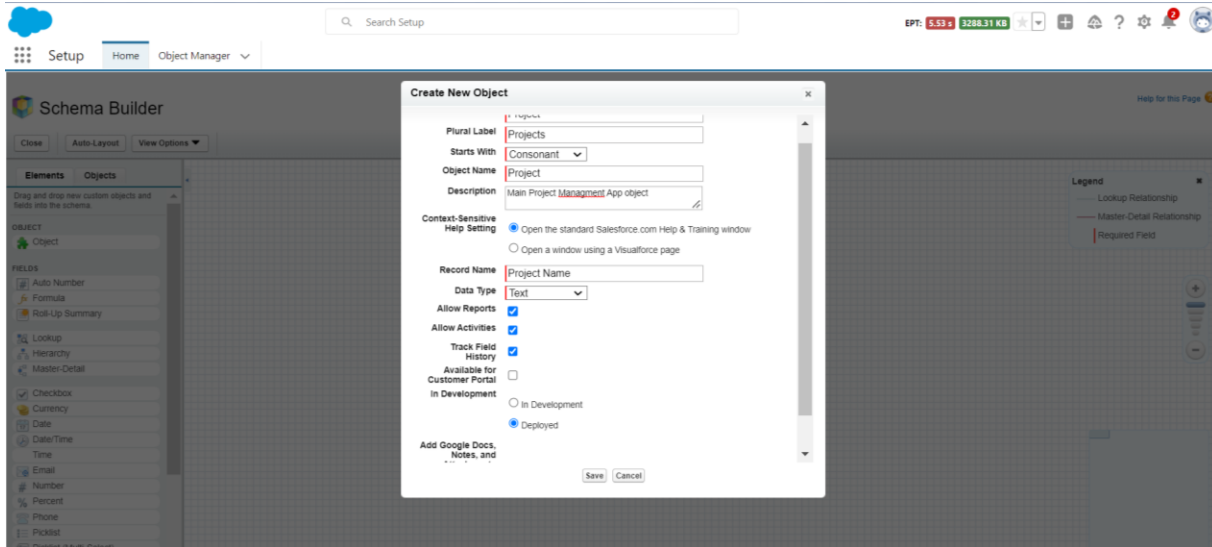


Click Clear all

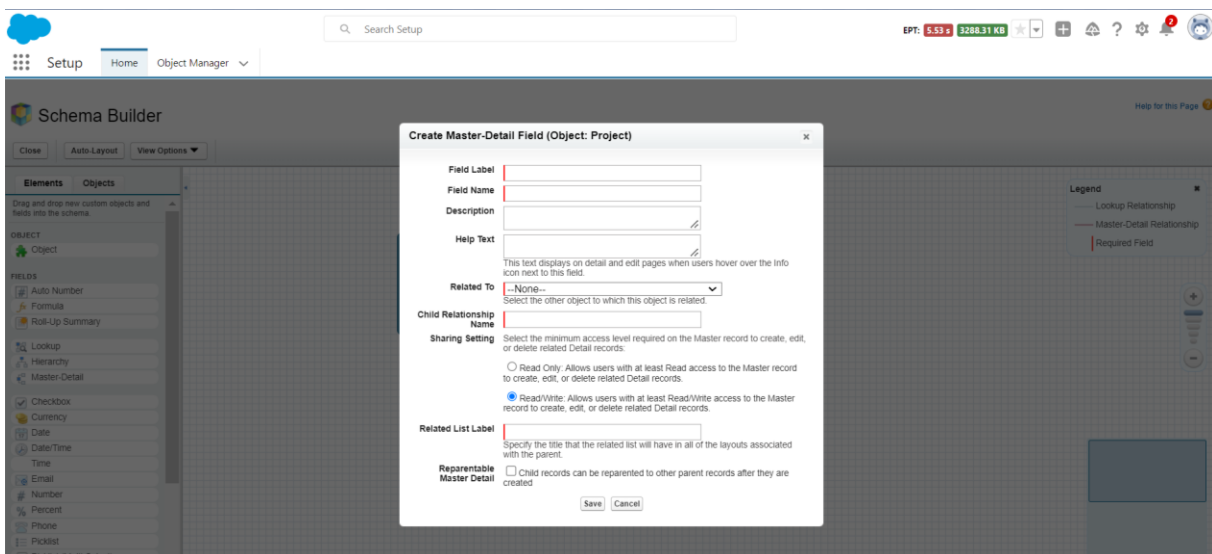
Go to Elements tab -> Create a new object -> label it Project



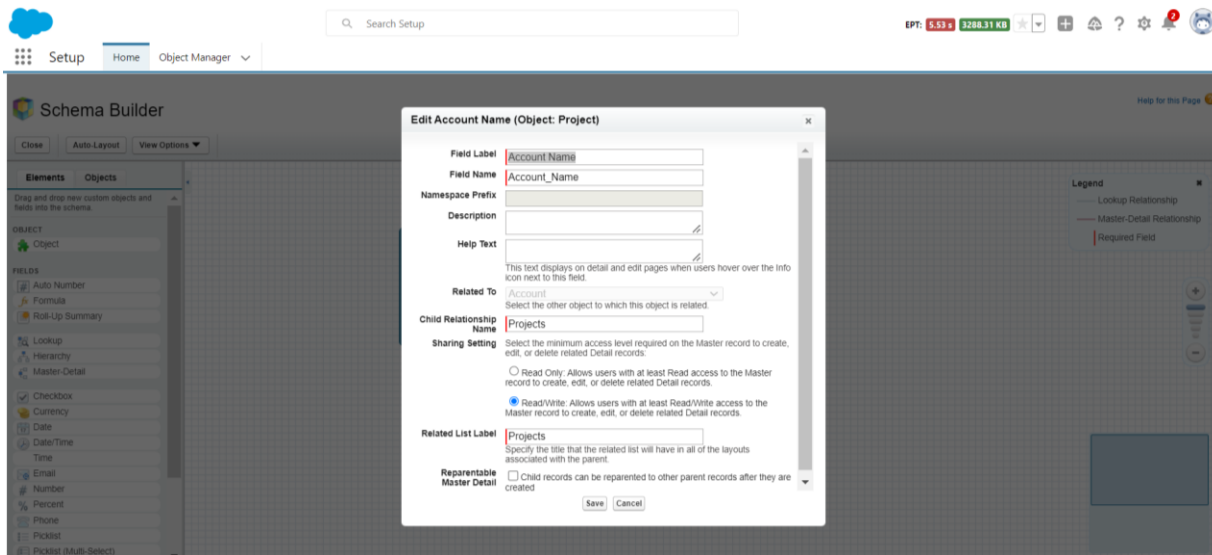
Allow Reports and Activities -> Click Save



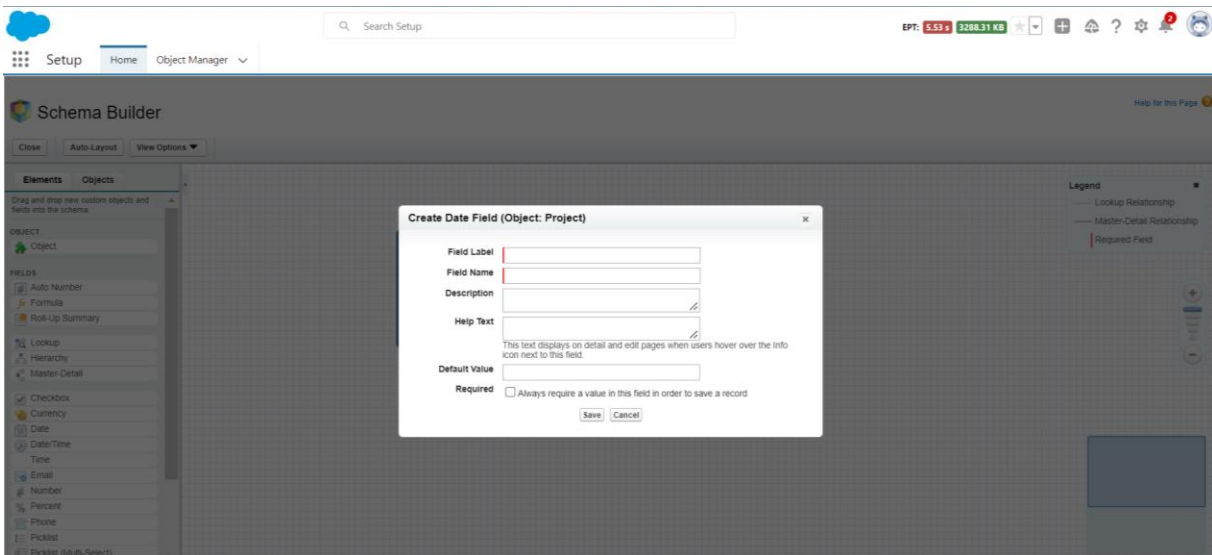
Next add a Master – Detail relationship to the account so that every project will be associated with an account



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



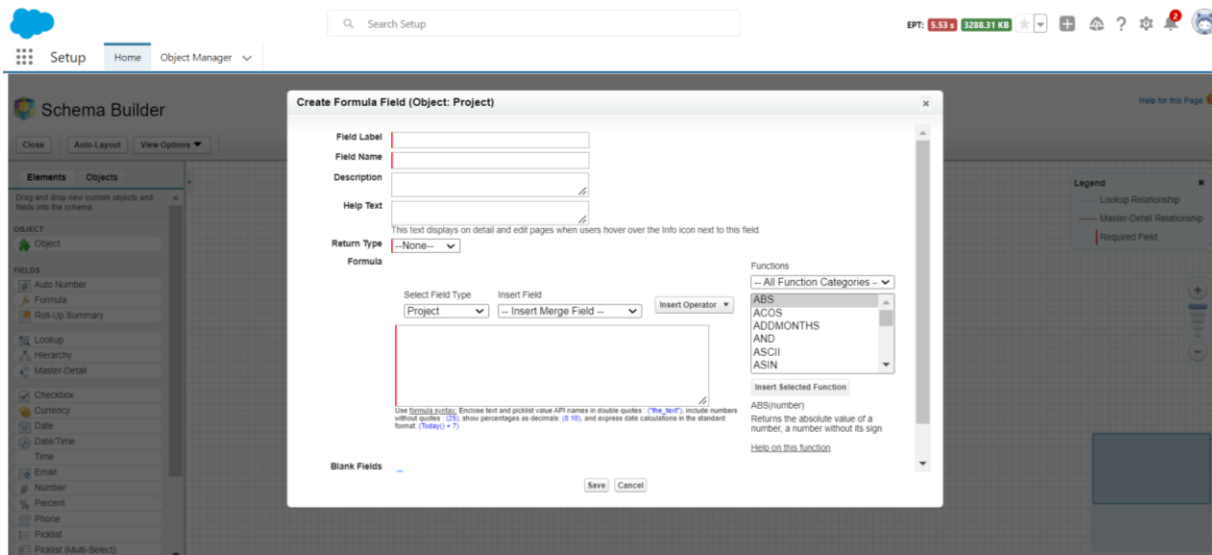
Next create a Date Field -> Drag and drop Date field into the schema builder



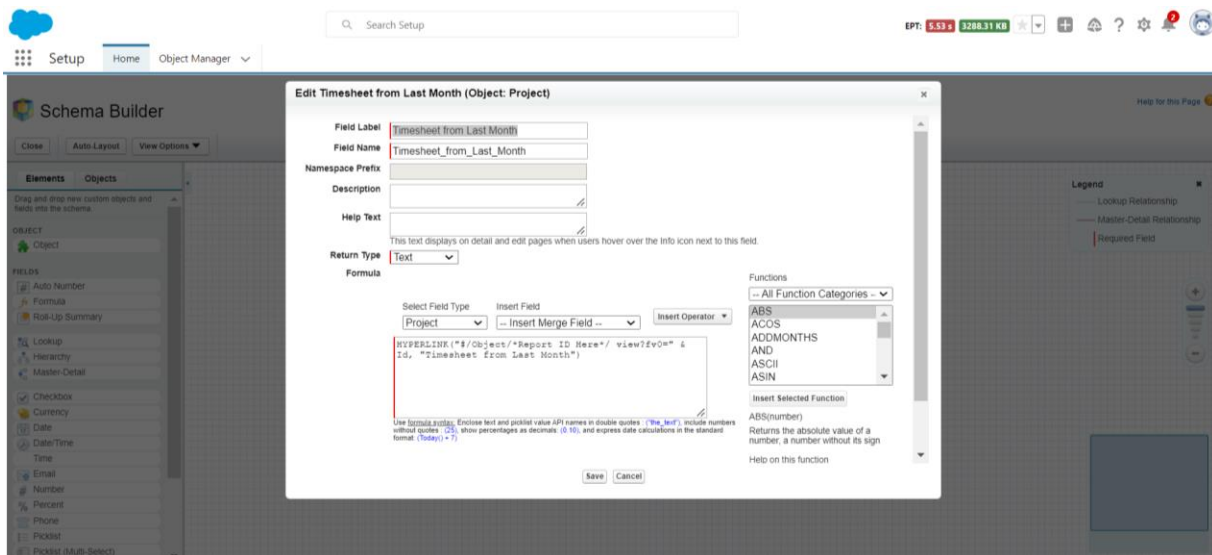
Field Label should be End Date -> click Save

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

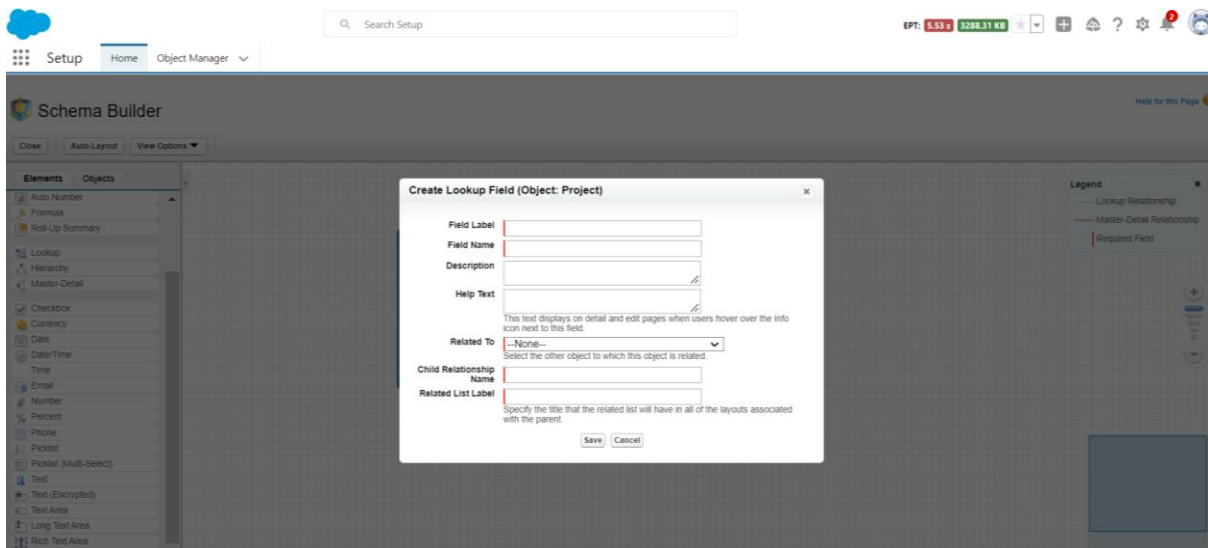
Drag and Drop Formula into the Schema Builder



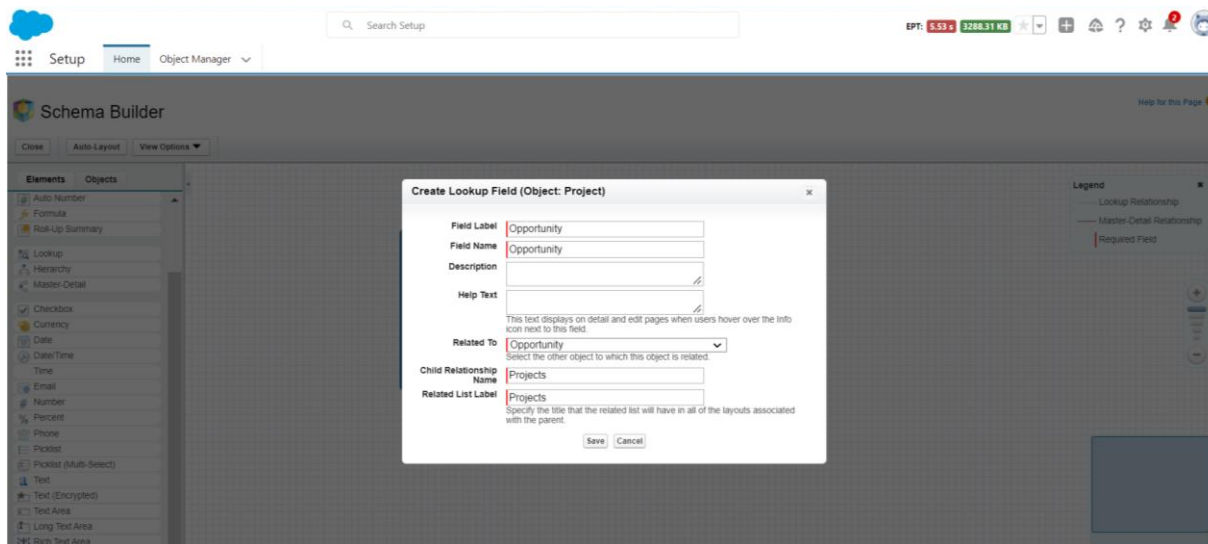
Insert your formula -> select Text for Return Type -> Click Save



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

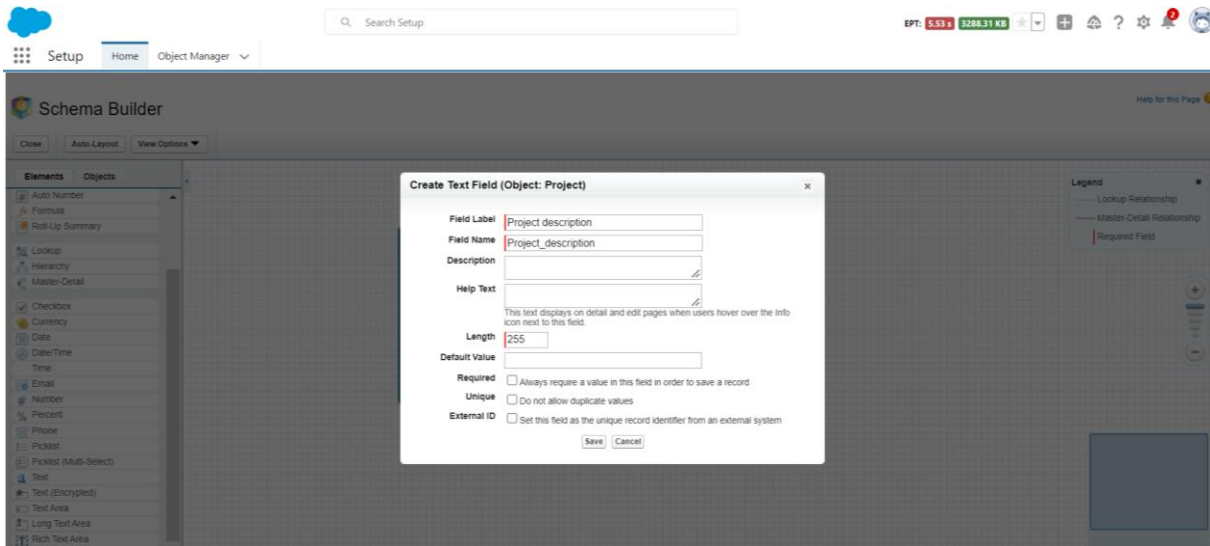


Fill in Opportunity and Relate to Opportunity -> Click Save

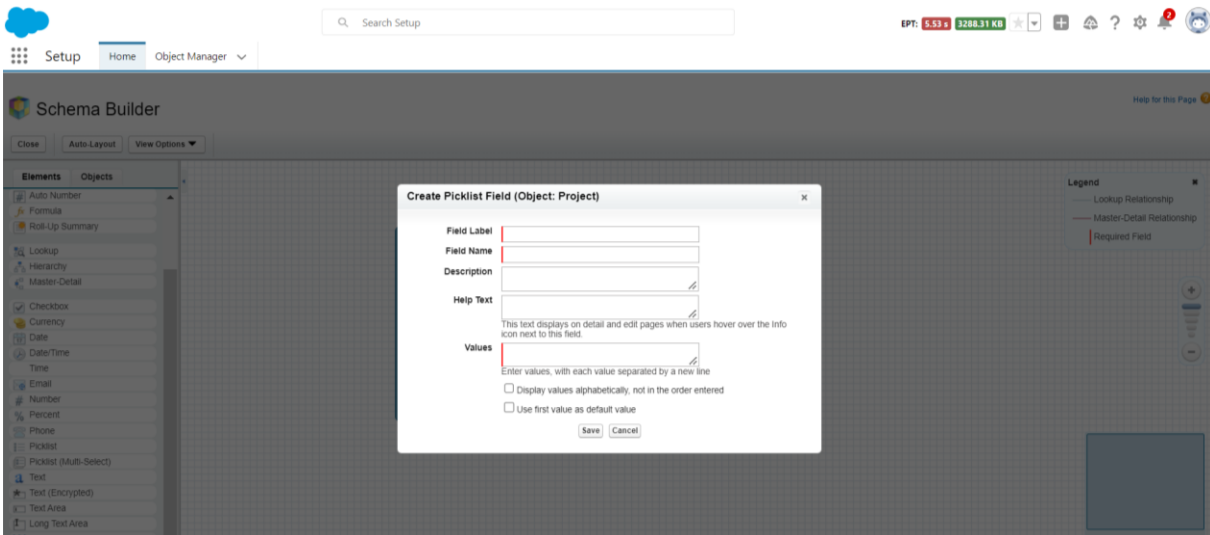


Now add the Project description. Select Text and drag and drop into schema

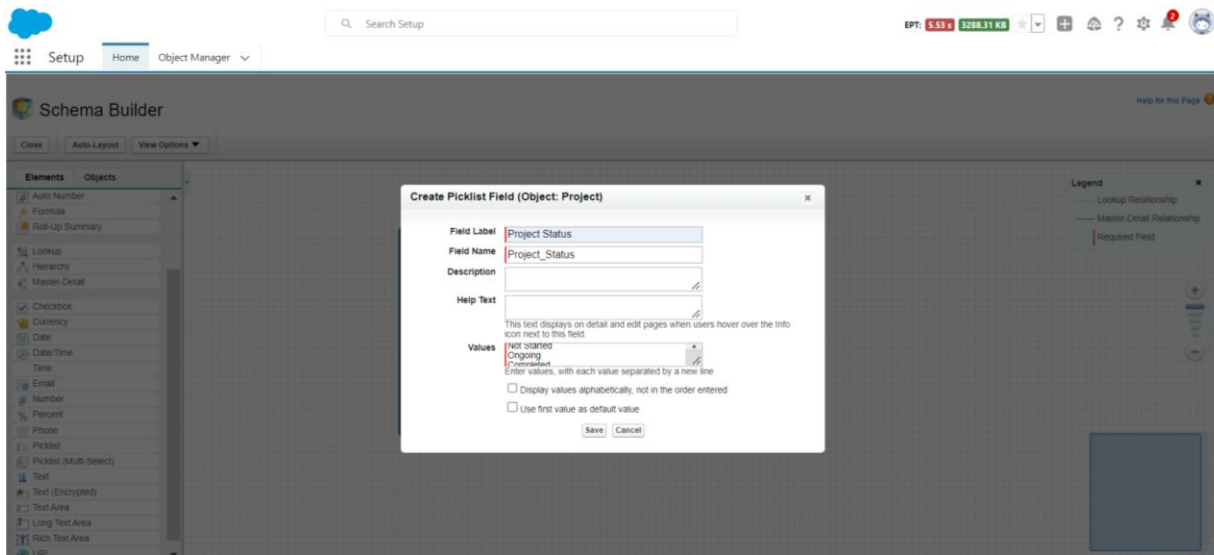
Fill in Project Description as feild Label and make it 255 Characters -> Click save



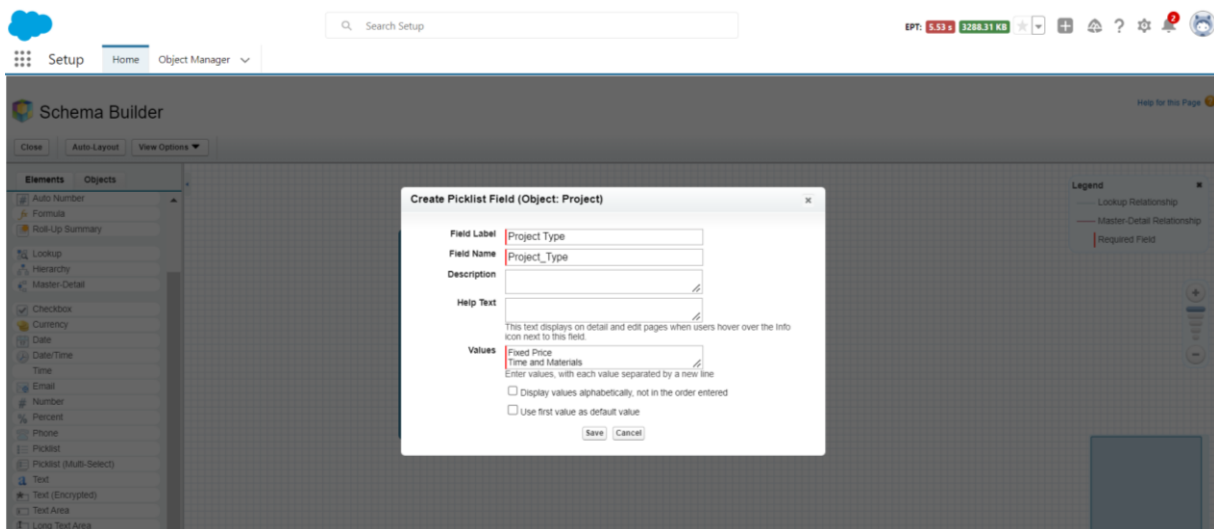
Now create project status which will be a Picklist. Drag and drop Picklist into the schema builder



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 into 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

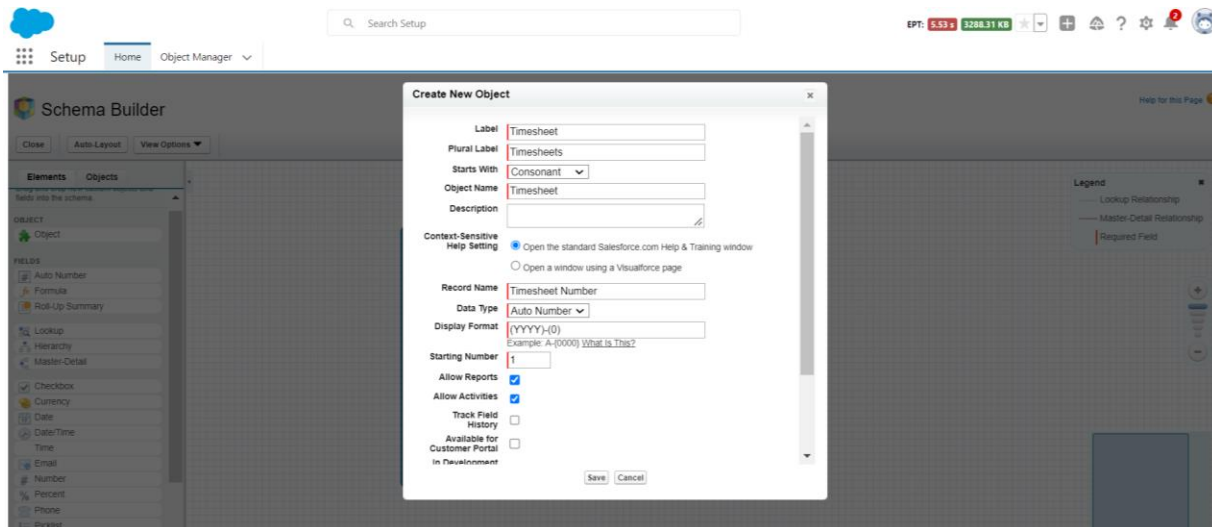
The screenshot displays the Salesforce Schema Builder interface. At the top, there is a search bar labeled 'Search Setup' and a status bar showing 'EPT: 5.53 3268.31 KB'. The main header includes 'Setup', 'Home', and 'Object Manager'. The 'Schema Builder' title is visible, along with 'Close', 'Auto-Layout', and 'View Options' buttons. On the left, a sidebar lists various field types under 'Elements' and 'Objects', including Auto Number, Formula, Roll-Up Summary, Lookup, Hierarchy, Master-Detail, Checkbox, Currency, Date, Date/Time, Time, Email, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text, Text (Encrypted), Text Area, Long Text Area, and Rich Text Area. A central dialog box titled 'Create Number Field (Object: Project)' is open, containing the following fields and options:

- Field Label:** Total Hours
- Field Name:** Total_Hours
- Description:** (empty text area)
- Help Text:** (empty text area)
- Default Value:** (empty text field)
- 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

Buttons for 'Save' and 'Cancel' are located at the bottom of the dialog. On the right side of the Schema Builder, a 'Legend' panel shows symbols for 'Lookup Relationship', 'Master-Detail Relationship', and 'Required Field'.

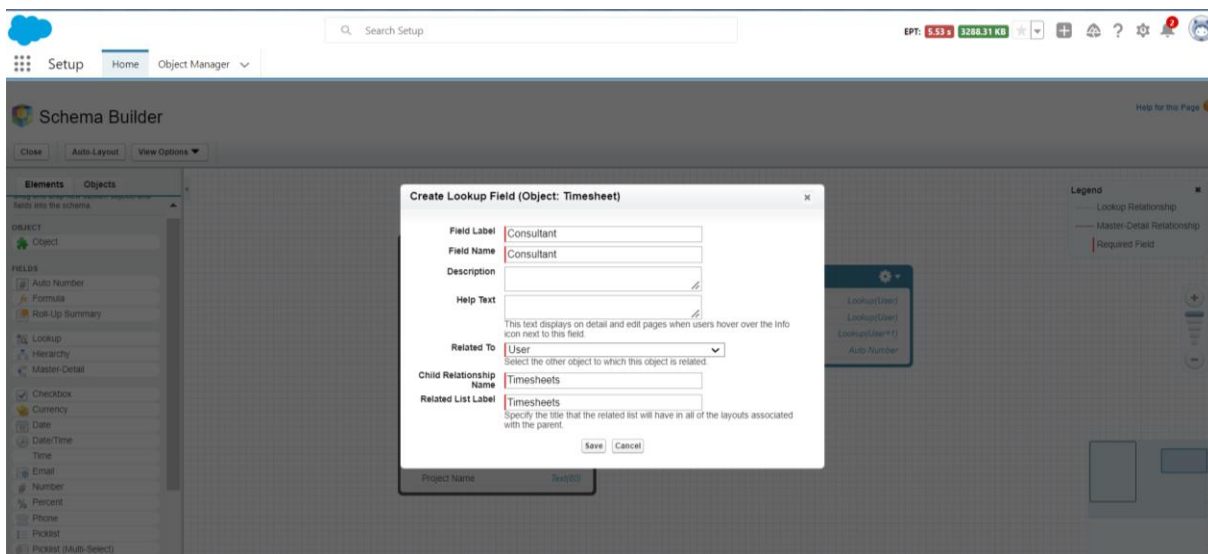
Create a new Object

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



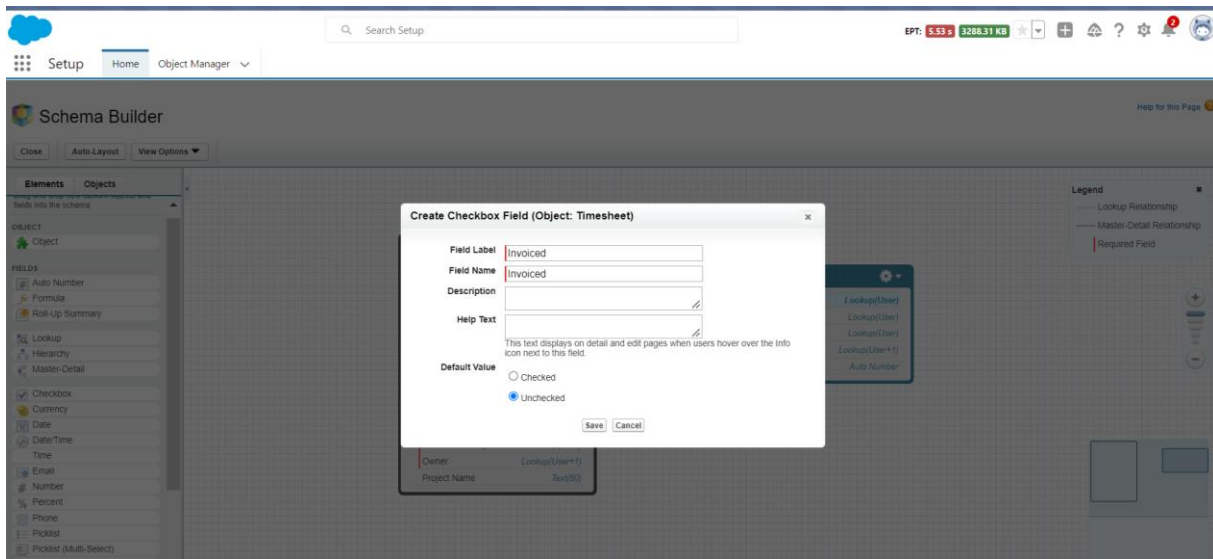
Now Create a Lookup field by dragging and dropping Lookup Field into the new Object

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

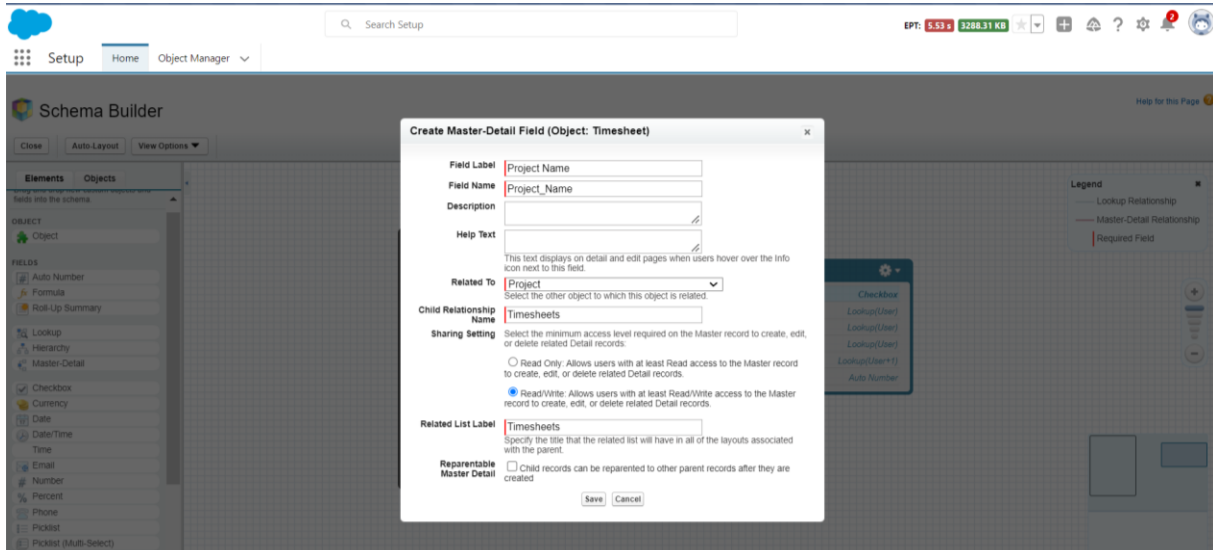


Now to denote whether a particular timesheet line item has been invoiced create a checkbox field.

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



The screenshot shows the Schema Builder interface with two objects defined:

- Project** (16 fields):
 - Total Hours: Number (16, 2)
 - Start Date: Date
 - Project Type: Picklist
 - Project Status: Picklist
 - Project description: Text(255)
 - Opportunity: Lookup(Opportunity)
 - Timesheet from Last Month: Formula (Text)
 - End Date: Date
 - Account Name: Master-Detail(Account)
 - Created By: Lookup(User)
 - Last Modified By: Lookup(User)
 - Owner: Lookup(User*)
 - Project Name: Text(80)
- Timesheet** (7 fields):
 - Project Name: Master-Detail(Project)
 - Inviced: Checkbox
 - Consultant: Lookup(User)
 - Created By: Lookup(User)
 - Last Modified By: Lookup(User)
 - Owner: Lookup(User*)
 - Timesheet Number: Auto Number

A red line indicates a Master-Detail relationship between the Project Name field in Timesheet and the Project object.

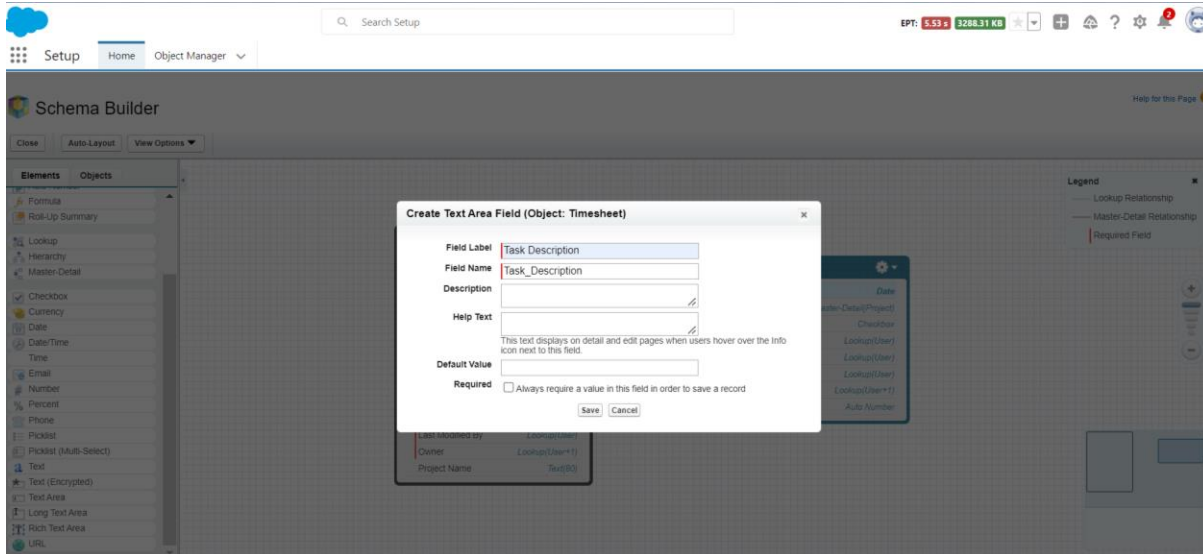
Now we want to add a date field to track what day the Timesheet was written for Label it Task Date

The screenshot shows the 'Create Date Field (Object: Timesheet)' dialog box with the following fields:

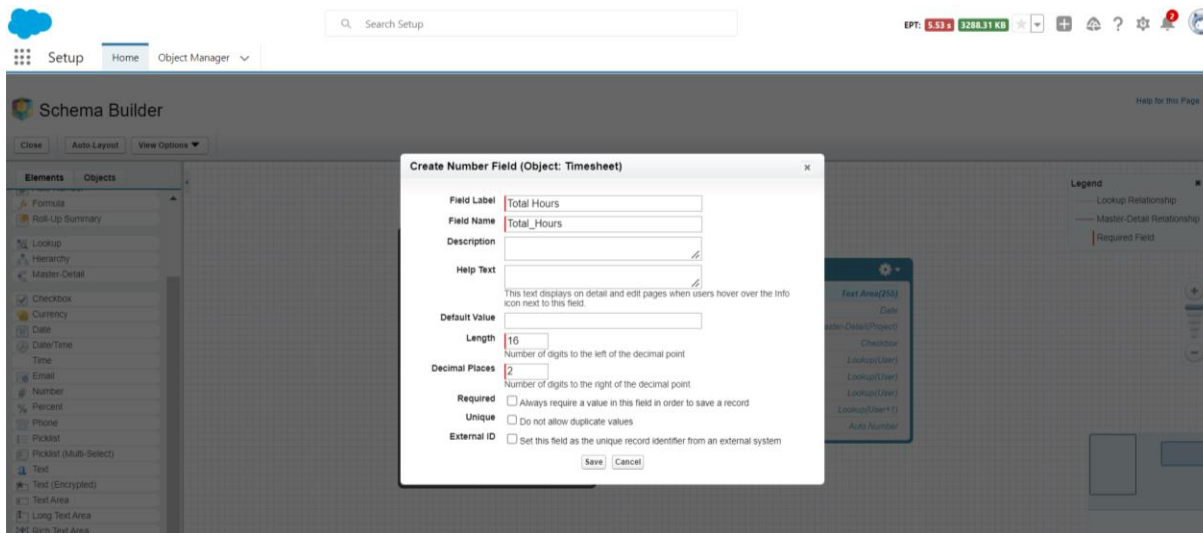
- Field Label: Task Date
- Field Name: Task_Date
- Description: (empty)
- Help Text: (empty)
- Default Value: (empty)
- Required: Always require a value in this field in order to save a record

The dialog also includes 'Save' and 'Cancel' buttons.

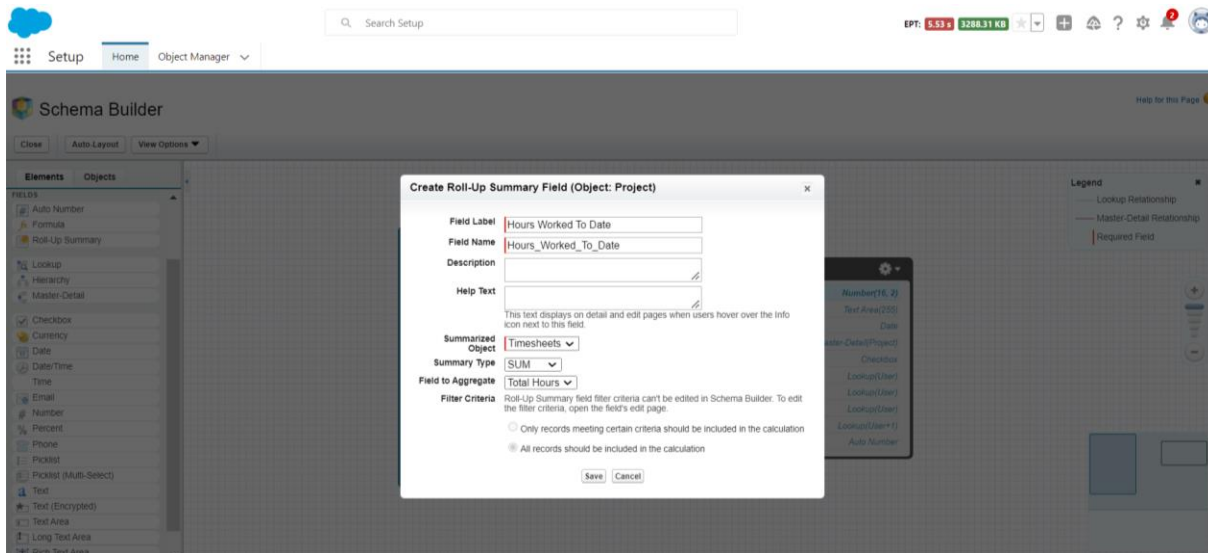
We want to add a Description field to describe what kind of work we have done. Add a Text Area -> label it Task Description -> Click Save



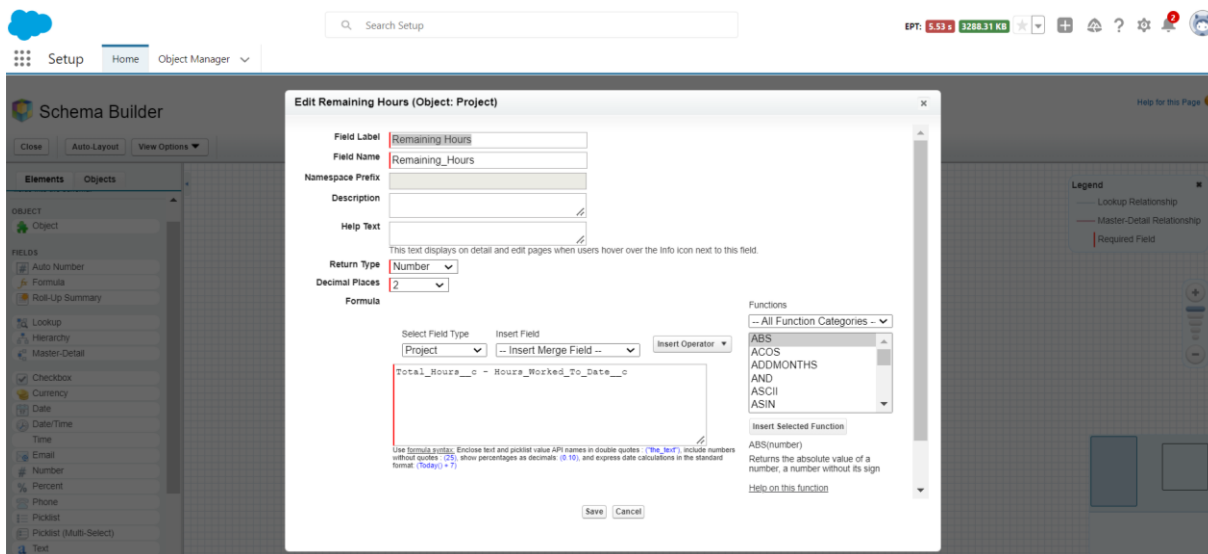
Lastly total Hours for a given line item is going to be a Number



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

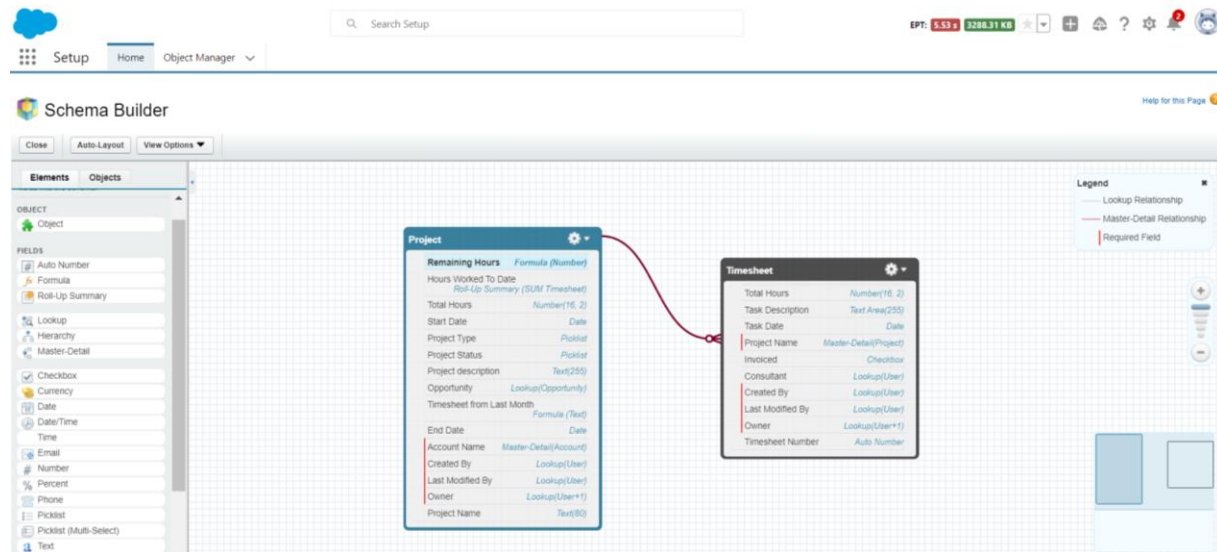


Lastly we need a Formula for Remaining hours which will be Remaining Hours -> Return type Number -> 2 decimal places -> Formula is `Total_Hours__c - Hours_Worked_To_Date__c` -> Click Save.

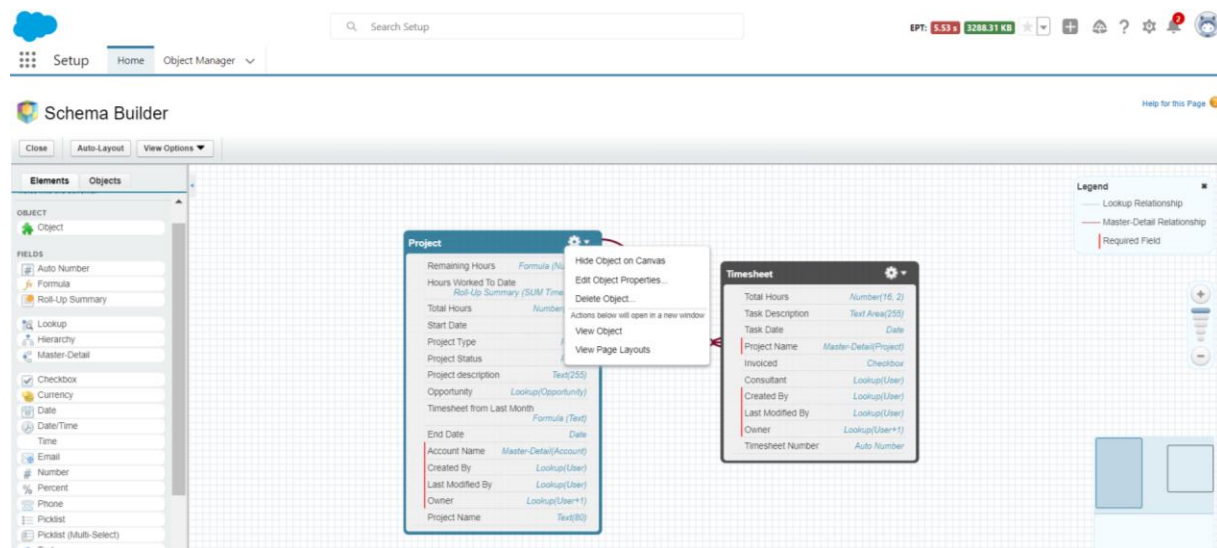


The Schema Is done now we edit our layout.

Edit Object Page Layout



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



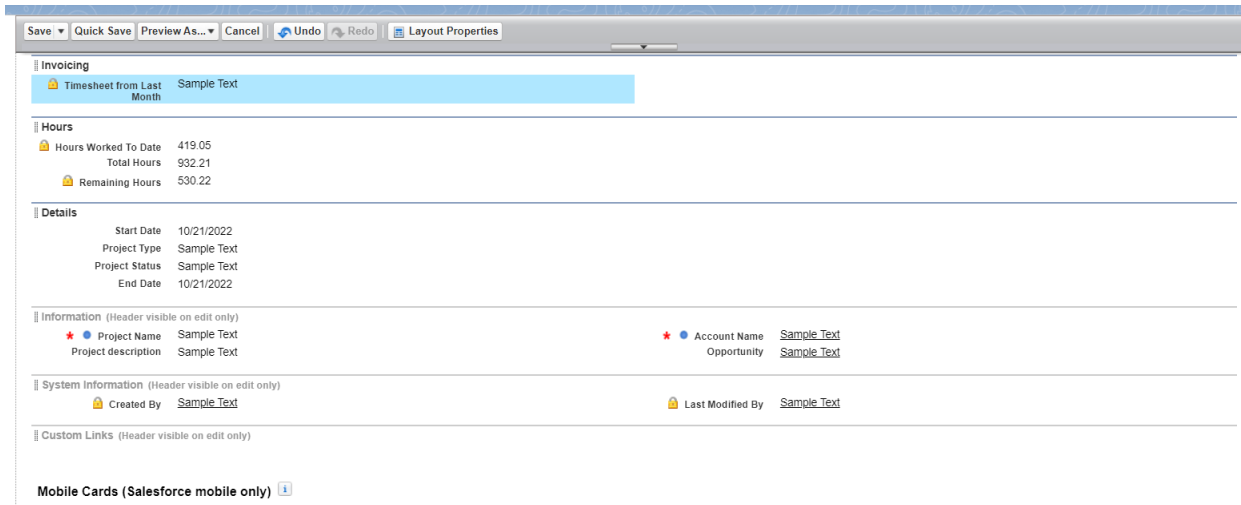
In Project Layout move elements around to your liking -> Add Project Description under Project Detail -> Add Opportunity under Project Detail.

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

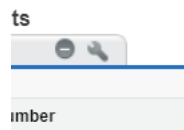
Drop in another Section call it "Hours", inside of hours we want to add Total Hours, Hours Worked To Date and Remaining Hours.

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

Under Related Lists add Timesheets and Click Save.

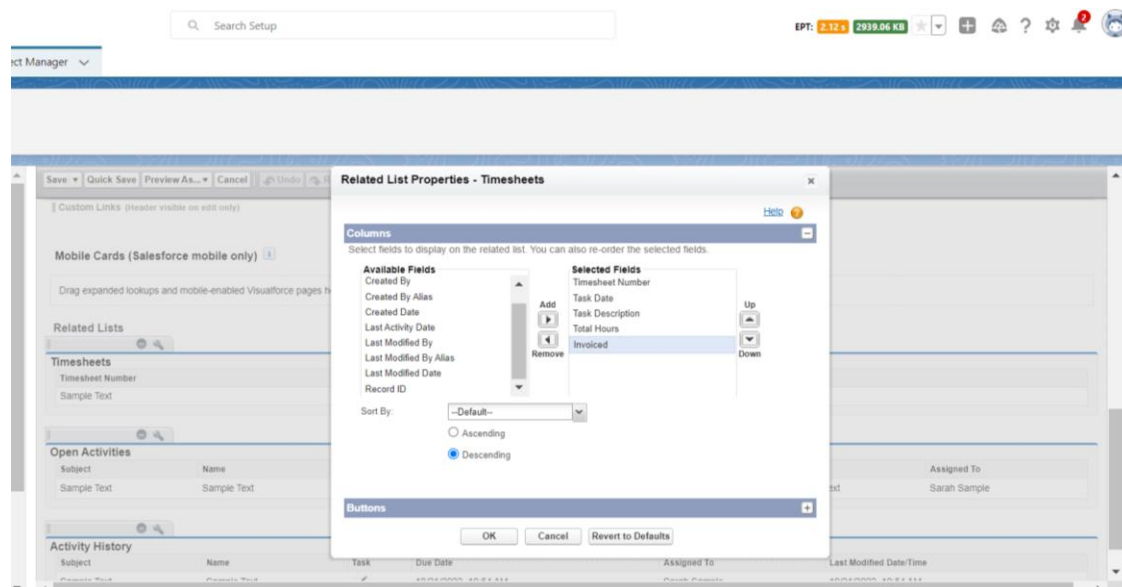


Now edit your related lists to include more relevant information for Timesheets by clicking the wrench icon



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

The screenshot shows the Salesforce Setup interface with a 'Field Properties' dialog box open. The dialog box has a title bar 'Field Properties' and a close button 'x'. It contains two sections: 'Read-Only' with a checkbox that is unchecked, and 'Required' with a checkbox that is checked. Below these sections are 'OK' and 'Cancel' buttons. The background shows the 'Timesheet' object page layout with sections for Invoicing, Hours, Details, Information, System Information, and Custom Links.

Click Save

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

The screenshot shows the Salesforce Setup interface for the 'Timesheet' object. The 'Page Layouts' section is active, showing a table with one entry: 'Timesheet Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'Created By' and 'Modified By' fields show 'Maia Young, 10/21/2022, 10:16 AM'. There are 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top right of the table.

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

The screenshot shows the Salesforce Setup interface for the Timesheet object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Timesheet' and contains a 'Fields' table. The table has the following columns: Field Name, Invoiced, Task Description, Last Modified By, Timesheet Number, Consultant, Project Name, and Total Hours. The 'Invoiced' column is highlighted in blue. Below the table, there are sections for 'Information', 'System Information', and 'Custom Links'. The 'Information' section shows fields like Project Name, Consultant, Task Date, Task Description, and Total Hours. The 'System Information' section shows 'Created By' and 'Last Modified By'. The 'Custom Links' section is currently empty.

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 Label 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

The screenshot shows the 'Report Types' setup page in Salesforce. The 'Report Type Focus' section is highlighted, showing the 'Primary Object' set to 'Accounts'. The 'Identification' section shows the 'Report Type Label' as 'Projects & Timesheets', the 'Report Type Name' as 'Projects_Timesheets', and the 'Description' as 'Custom report types to access the project and timesheet fields'. The 'Store in Category' is set to 'Accounts & Contacts'. The 'Deployment' section shows the 'Deployed' radio button selected.

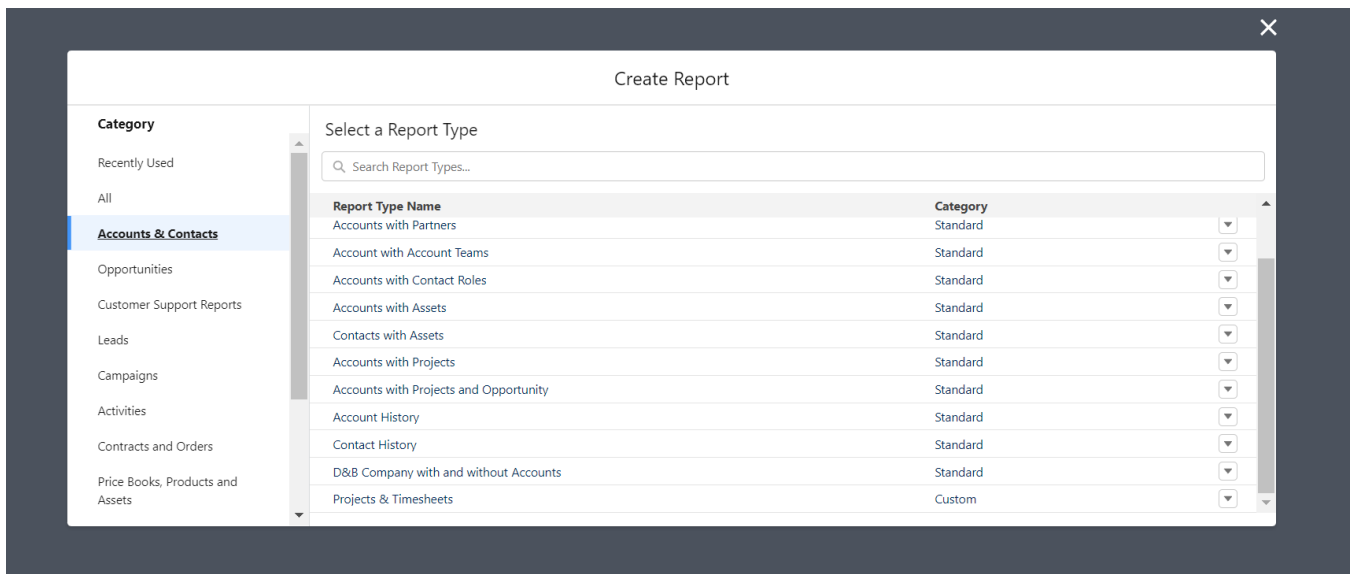
Next Account will relate to Projects, and the Projects will relate to the timesheets.

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

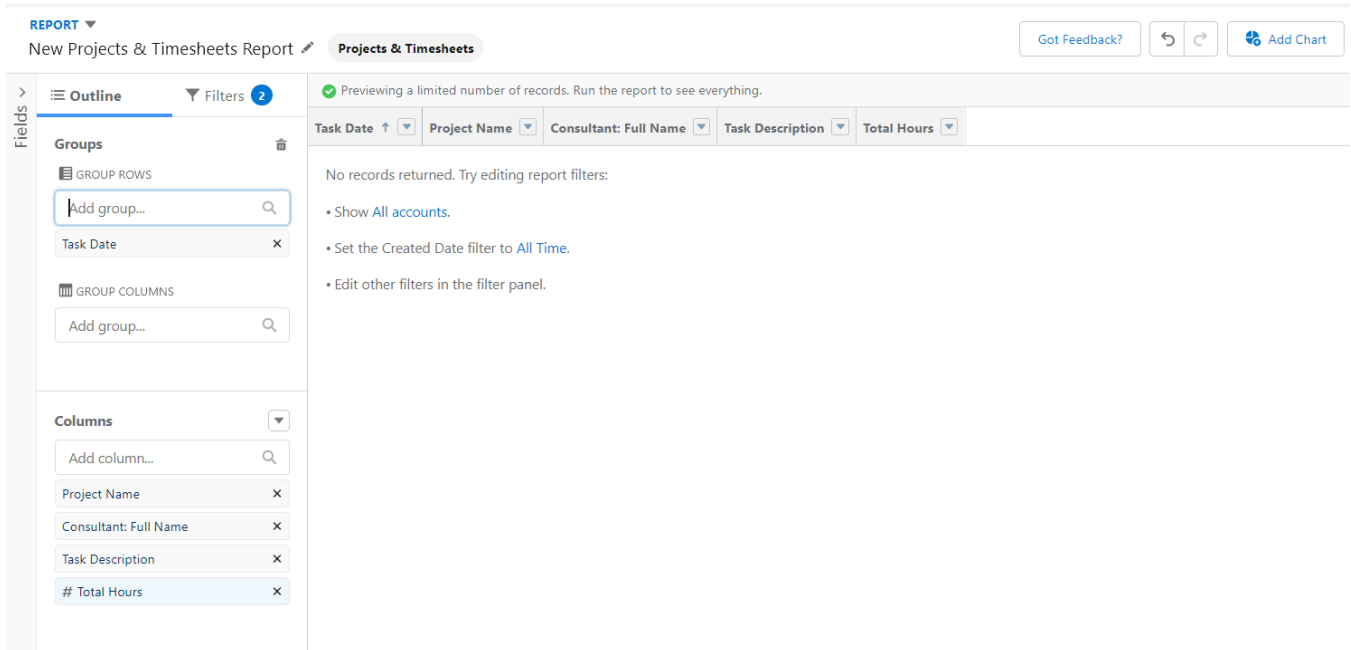
The screenshot shows the 'Step 2. Define Report Records Set' section of the 'Projects & Timesheets' report type setup. The 'Primary Object' is 'Accounts'. The 'A to B Relationship' section shows the first radio button selected, indicating that each 'A' record must have at least one related 'B' record. The 'B to C Relationship' section shows the second radio button selected, indicating that 'B' records may or may not have related 'C' records. A Venn diagram illustrates the relationships between Accounts (A), Projects (B), and Timesheets (C).

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

REPORT ▾
New Projects & Timesheets Report ✎ **Projects & Timesheets**

Fields > Outline **Filters** 3

✓ Previewing a limited number of records. Run

Task Date	Project Name	Consul
No records returned. Try editing report filters.		

• Show [All accounts](#).

• Edit other filters in the filter panel.

Filters

Add filter...

Show Me My accounts

Created Date All Time

Project ID equals ""

Task Date equals LAST MONTH

Make Public so anyone can access it -> Click Save

REPORT ▾
New Projects & Timesheets Report ✎ **Projects & Timesheets**

Save Report

* Report Name
Timesheet for Last Month

Report Unique Name ⓘ
Timesheet_for_Last_Month_HgC

Report Description

Folder
Public Reports

Report: Projects & Timesheets
Timesheet for Last Month

Total Records: 0 Total Total Hours: 0.00

No Results

No records returned. Try editing report filters:

- Show [All accounts](#).
- Edit other filters in the filter panel.

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”

looking for?

Default Sharing Settings			
Organization-Wide Defaults			Organization-Wide
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”

Search Setup

EPT: 1.34 s 3354.79 KB

Object Manager

SETUP Sharing Settings

Seller	Private	Private	✓
Service Appointment Group	Private	Private	✓
Service Contract	Private	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Thanks	Public Read Only	Private	☐
User Provisioning Request	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Procedure	Private	Private	✓
Work Step Template	Private	Private	✓
Ecomm Customer	Public Read/Write	Private	✓
OrderS	Public Read/Write	Private	✓
ProductS	Public Read/Write	Private	✓
Project	Controlled by Parent	Controlled by Parent	
Timesheet	Controlled by Parent	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

Setup Home Object Manager

SETUP Tabs

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to

Custom Object Tabs [New](#) [What is This?](#)
No Custom Object Tabs have been defined

Web Tabs [New](#) [What is This?](#)
No Web Tabs have been defined

Visualforce Tabs [New](#) [What is This?](#)
No Visualforce Tabs have been defined

Lightning Component Tabs [New](#) [What is This?](#)

Action	Label	Tab Style
Edit	Get Your Login Credentials	Flag
Edit	Install a Package	Compass
Edit	Welcome	Chalkboard

Lightning Page Tabs [New](#) [What is This?](#)

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

Object Manager

Search Setup

EPT: 1.64 s 4473.11 KB

Object Manager

SETUP
Tabs

New Custom Object Tab

Help for this Page

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object: Project

Tab Style: Wrench

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description:

Next Cancel

Default on for all profiles -> Click Next

Home Object Manager

Search Setup

EPT: 1.64 s 4473.11 KB

Home Object Manager

SETUP
Tabs

New Custom Object Tab

Help for this Page

Step 2. Add to Profiles Step 2 of 3

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Apply one tab visibility to all profiles Default On

 Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On

Include in All apps -> Click Save

Search Setup

EPT: 1.64 s 4473.11 KB

Home Object Manager

SETUP
Tabs

<input checked="" type="checkbox"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Community (standard__Community)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Content (standard__Content)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Commerce (standard__Commerce)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Bot Solutions (standard__LightningBot)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Append tab to users' existing personal customizations	

Previous Save

Do the same for the Timesheet object

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page to mobile app.

Action	Label	Tab Style
Edit Del	Projects	Wrench
Edit Del	Timesheets	Alarm clock

Custom Object Tabs [New](#) [What Is This?](#)

Web Tabs [New](#) [What Is This?](#)

No Web Tabs have been defined

Visualforce Tabs [New](#) [What Is This?](#)

No Visualforce Tabs have been defined

Next lets create an App to tie it all together

Create a Lightning App

Go to the App Manager -> New Lightning App

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

* Developer Name

Description

App Branding

Image

Primary Color Hex Value

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview

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

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

* Developer Name

Description

App Branding

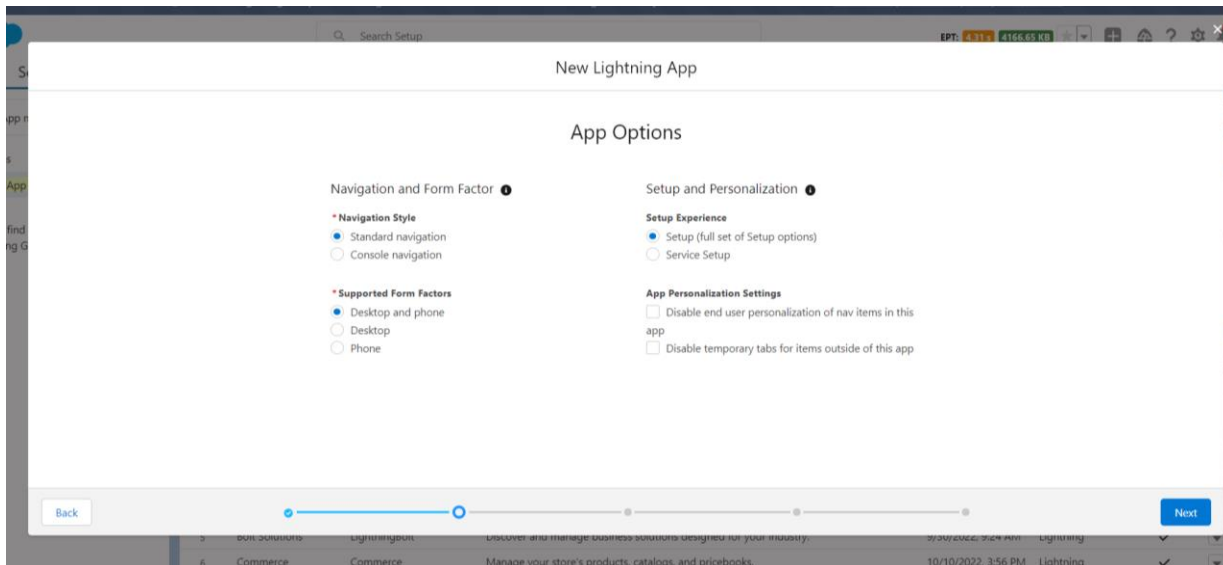
Image

Primary Color Hex Value

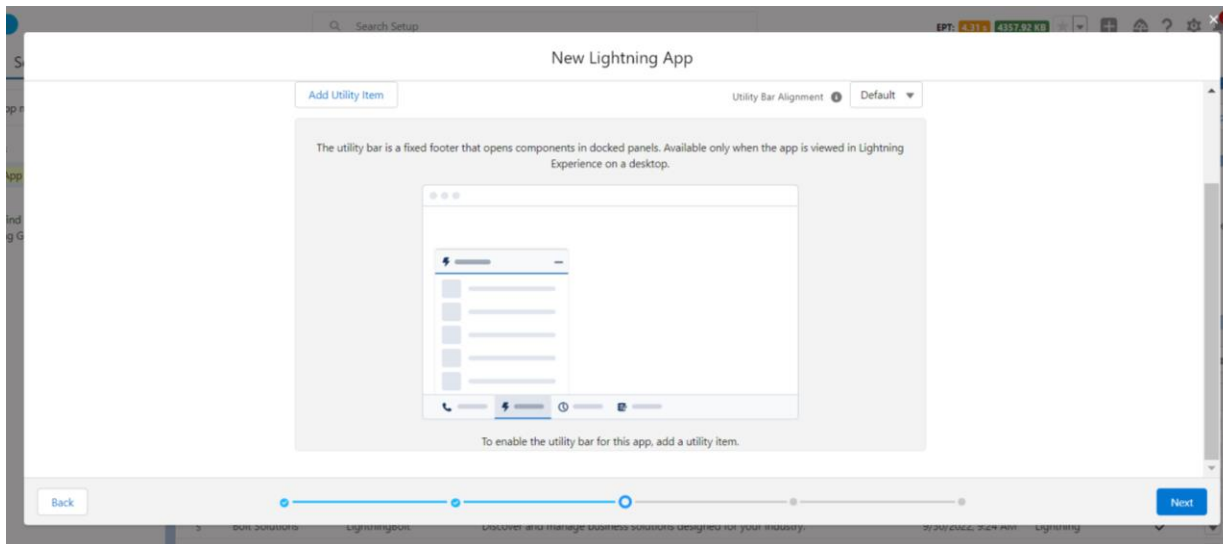
Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview

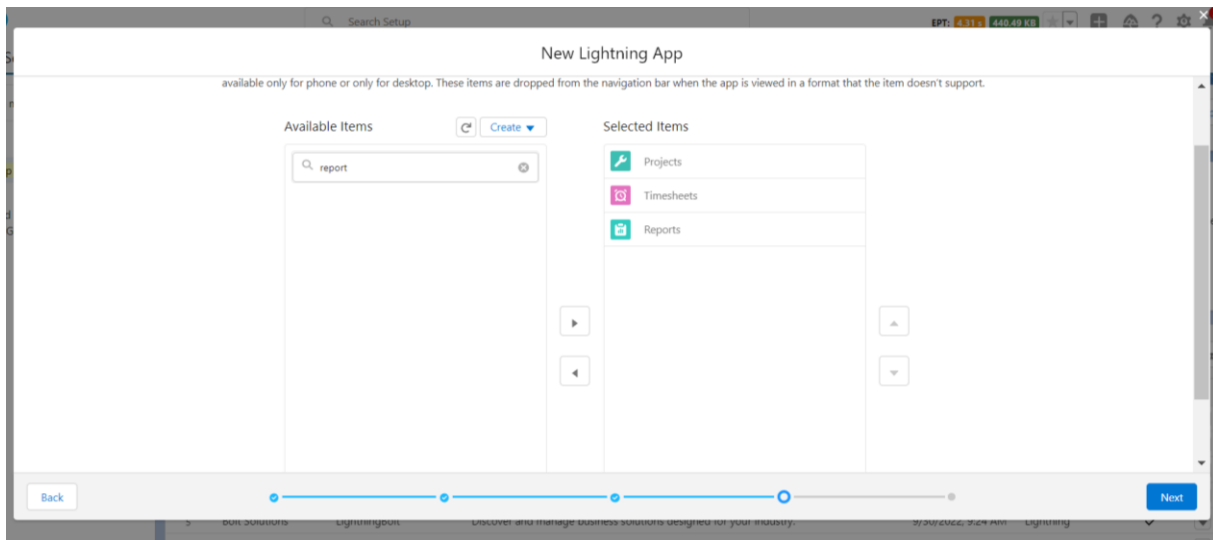
Leave everything as is -> Click Next



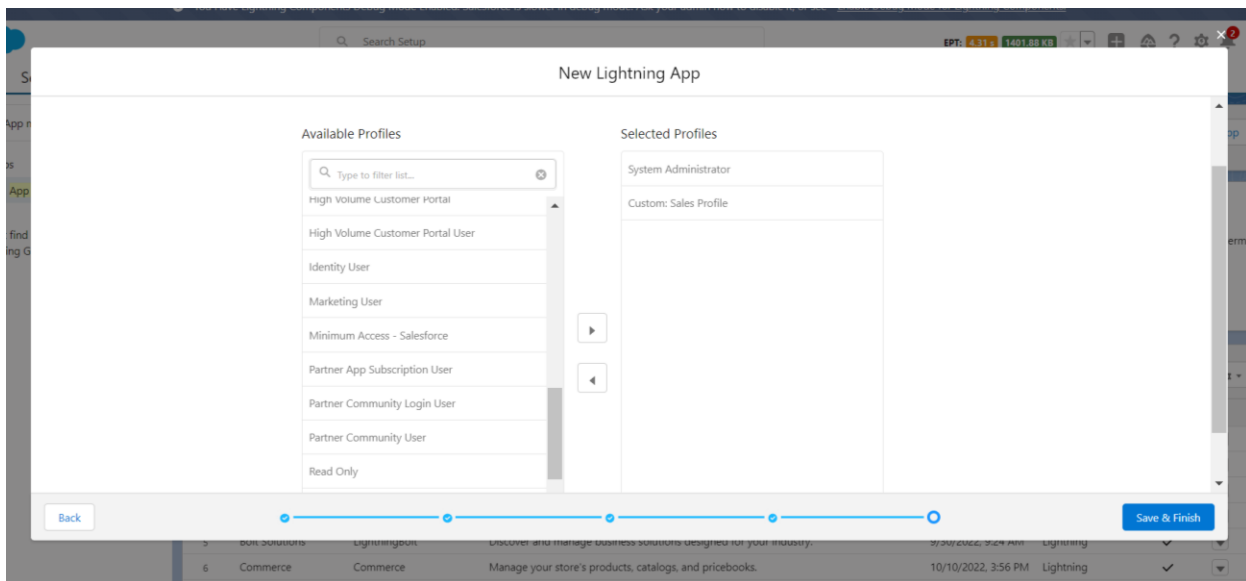
Click Next we don't want any utility items



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

App Launcher

Search apps or items... [Visit AppExchange](#)

▼ All Apps

PM Project Management	Service Manage customer service with accounts, contacts...	Marketing Best-in-class on-demand marketing automation
Sample Console (Salesforce Classic) Lets agents work with multiple...	Community Salesforce CRM Communities	Site.com Build pixel-perfect, data-rich websites using the...
Salesforce Chatter The Salesforce Chatter social network, including...	Content Salesforce CRM Content	Sales Manage your sales process with accounts, leads...
Sales Console (Lightning Experience) Lets sales reps work with...	Service Console (Lightning Experience) Lets support agents work...	Lightning Usage App View Adoption and Usage Metrics for Lightning...

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

Project Managemen... Projects ▼ Timesheets ▼ Reports ▼

Report: Projects & Timesheets
Timesheet for Last Month

Total Records	Total Total Hours
0	0.00

No Results

No records returned. Try editing report filters:

- Show [All accounts](#).
- Edit other filters in the filter panel.

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

← → ↻ <https://resilient-koala-m6zi0-dev-ed.trailblaze.lightning.force.com/lightning/r/Report/0008Z000007LZToUAC/view?queryScope=userFolders> 🔍 📄 ☆

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

Relationships	Field Label	Field Name	Data Type
ts	Opportunity	Opportunity__c	Lookup(Opportunity)
Record Pages	Project description	Project_description__c	Text(255)
Links, and Actions	Project Name	Name	Text(80)
Layouts	Project Status	Project_Status__c	Picklist
ts	Project Type	Project_Type__c	Picklist
es	Remaining Hours	Remaining_Hours__c	Formula (Number)
Lookup Filters	Start Date	Start_Date__c	Date
outs	Timesheet from Last Month	Timesheet_from_Last_Month__c	Formula (Text)
Position Layout	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	Ot
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	M

Formula Options

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

Formula Return Type | Text |

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Full Name = LastName & ", " & FirstName [More Examples...](#)

Simple Formula

Advanced Formula

Select Field Type

Insert Field

Project

-- Insert Merge Field --

Timesheet from Last Month (Text) =

```
HYPERLINK("#/Object/0008Z000007LZToUAc/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

Available Merge Fields		
Select Field Type	Select Field	Copy Merge Field Value
Project Fields	Project Status	{!Project__c.Project_Status__c}

Copy and paste the merge field value into your template below.

 **Classic Email Templates**

Text Email Template
Project Status Has Changed

[Help for](#)

Preview your email template below.

Email Template Detail

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

Email Templates from Salesforce		Unfiled Public Classic Email Templates	
Email Template Name	Project Status Has Changed	Available For Use	<input checked="" type="checkbox"/>
Template Unique Name	Project_Status_Has_Changed	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Maia Young [Change]		
Description			
Created By	Maia Young , 10/23/2022, 11:19 AM	Modified By	Maia Young , 10/23/2022, 11:50 AM

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

Email Template

[Send Test and Verify Merge Fields](#)

Subject | Your Project Status Has Changed!

Plain Text Preview

YOUR PROJECT STATUS HAS CHANGED, LOG IN TO SALESFORCE TO VIEW THIS UPDATE.

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

Project 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:

Active:

Description:

Error Condition Formula = Required Information

Example: [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

`AND(ISCHANGED(Project_Status__c),
OR (ISPICKVAL(PRIORVALUE (Project_Status__c), "Ongoing"),
ISPICKVAL (PRIORVALUE (Project_Status__c), "Completed")))`

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

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

Error Message

Example:

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

Validation Rules New

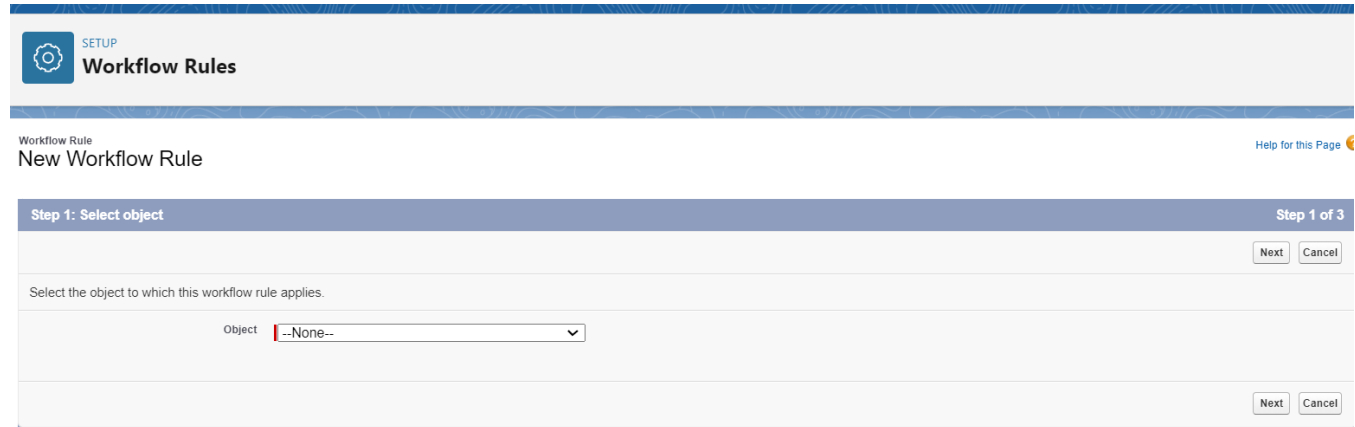
1 Items. Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
When Project status changes	Project Status	not a value	✓	Maia Young, 10/23/2022, 12:43 PM

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

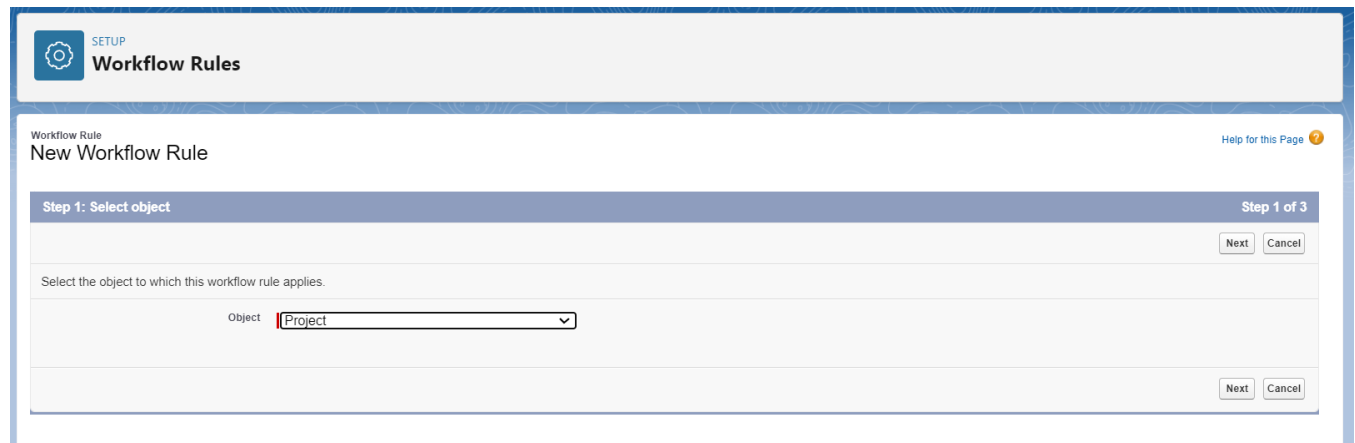
Workflow Rules & Email Notification

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



The screenshot shows the 'New Workflow Rule' setup page. At the top left, there is a 'SETUP' icon and the text 'Workflow Rules'. Below this, the page title is 'New Workflow Rule' with a 'Help for this Page' link. The main content area is titled 'Step 1: Select object' and 'Step 1 of 3'. It contains a form with the instruction 'Select the object to which this workflow rule applies.' and a dropdown menu labeled 'Object' with the value '--None--'. There are 'Next' and 'Cancel' buttons at the bottom right of the form.

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



The screenshot shows the 'New Workflow Rule' setup page, similar to the previous one, but with the 'Object' dropdown menu set to 'Project'. The rest of the page layout, including the 'SETUP' icon, 'Workflow Rules' title, and 'Step 1: Select object' header, remains the same.

SETUP
Workflow Rules

Object: Project
 Rule Name: Send Email when Project st
 Description: This rule will send an email when a project status changes

Evaluation Criteria
 Evaluate the rule when a record is:
 created
 created, and every time it's edited
 created, and any time it's edited to subsequently meet criteria ?
 How do I choose?

Rule Criteria
 Run this rule if the criteria are met :

Field	Operator	Value	
Project: Project Status	equals	Ongoing	AND
Project: Project Status	equals	Complete	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic...](#)

Previous Save & Next Cancel

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

No workflow actions have been added.

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

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

Unique Name ?

Object

Email Template ?

Protected Component

Recipient Type Search: for:

Recipients

Available Recipients

--None--

Add

▶

Remove

◀

Selected Recipients

User: Integration User
User: Maia Young
User: Security User

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

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 ▼

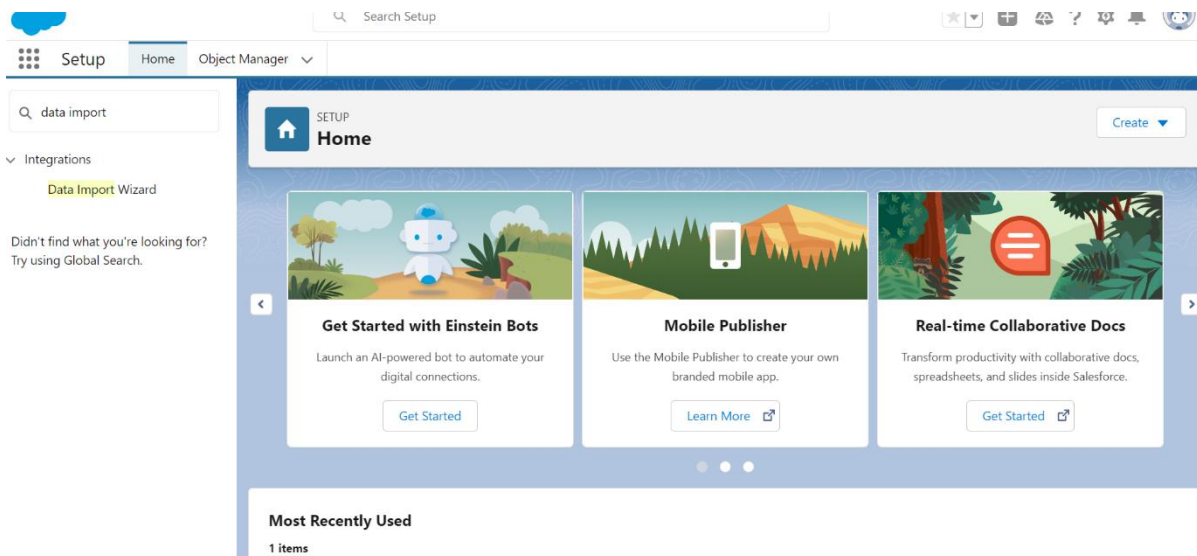
Time-Dependent Workflow Actions [See an example](#)

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

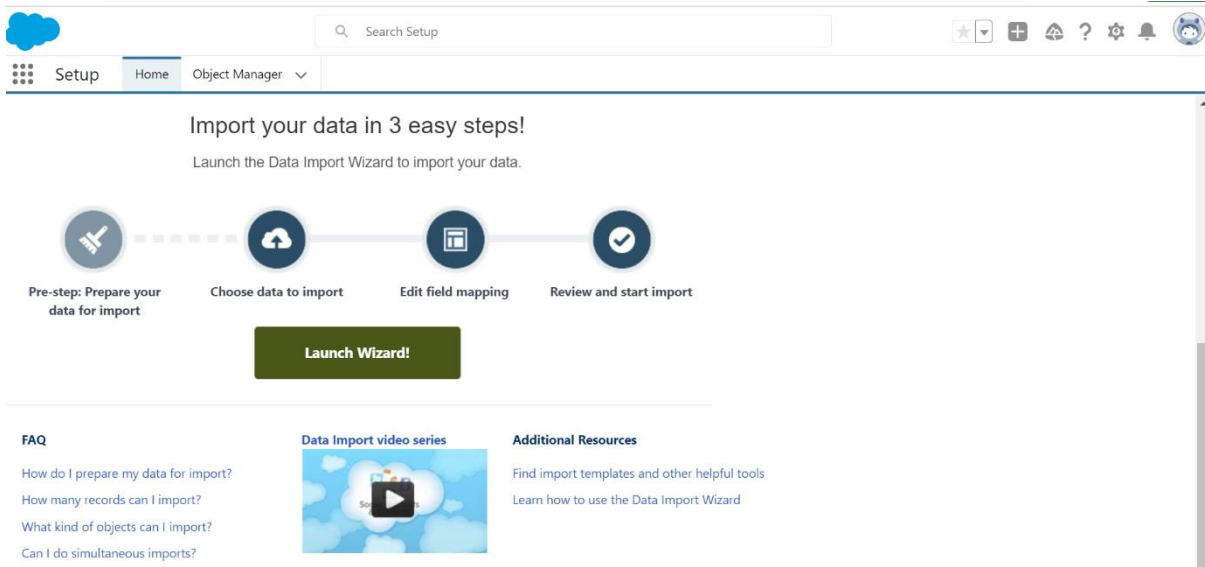
Add Time Trigger

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

The screenshot shows the 'Choose data' step of the Salesforce Import Wizard. At the top, there is a search bar labeled 'Search Setup' and navigation icons. Below the search bar, the breadcrumb trail shows 'Setup' > 'Home' > 'Object Manager'. A progress bar at the top indicates the current step is 'Choose data', with 'Edit mapping' and 'Start import' as subsequent steps. A blue callout box says 'Let's do this'. The main heading is 'Import your Data into Salesforce' with a sub-note: 'You can import up to 50,000 records at a time.' and a 'Help for this page' link. There are three columns of questions: 'What kind of data are you importing?', 'What do you want to do?', and 'Where is your data located?'. The first column has 'Standard objects' and 'Custom objects' tabs, with 'Ecomm Customers' selected under 'Standard objects'. The second and third columns are empty. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons.

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

The screenshot shows the 'Edit mapping' step of the Salesforce Import Wizard. The progress bar now shows 'Getting closer...'. The 'Choose data' step is completed. The 'What kind of data are you importing?' column shows 'Ecomm Customers' selected with a green checkmark. The 'What do you want to do?' column has a blue callout box with a green checkmark and the following options: 'Add new records', 'Match by: --None--', 'Which User field in your file designates record owners? --None--', and 'Trigger workflow rules and processes?' with an unchecked checkbox. The 'Where is your data located?' column has a 'Drag CSV file here to upload' area with a 'CSV' file icon. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons.

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

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Email	Email	mstephenson	hduke@hotmail.com	pallen@yahoo.com
Change	Address	Address	835 Frank Tunnel Wrightmouth, MI	4547 Archer Com Diazchester, CA	24645 Valerie Unions Suite 582 Cobbborough, DC 99414-7564
Change	Avatar	Avatar	Violet	DarkGreen	Bisque
Map	Unmapped	Avg. Session Length	34.49726772	31.92627202	33.000914755642675
Change	Time On App	Time on App	12.65565114	11.10946072	11.33027805777512
Change	Time on Website	Time on Website	39.57766801	37.26895886	37.11059744212085

Buttons: Cancel, Previous, Next

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

Edit Field Mapping: Ecomm Customers

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Email	Email	mstephenson@le	hduke@hotmail.c	pallen@yahoo.com
Change	Address	Address	835 Frank Tunnel Wrightmouth, MI	4547 Archer Com Diazchester, CA	24645 Valerie Unions Suite 582 Cobbborough, DC 99414-7564
Change	Avatar	Avatar	Violet	DarkGreen	Bisque
Change	Average Session Length	Avg. Session Length	34.497267725112	31.926272026368	33.000914755642675
Change	Time On App	Time on App	12.655651149166	11.109460728682	11.33027805777512
Change	Time on Website	Time on Website	39.577668019528	37.26895886829	37.11059744212085
Change	Length of Membership	Length of Membership	4.0826206329528	2.6640341821328	4.104543202376424

Buttons: Cancel, Previous, Next

Click Next and Start Import

Review & Start Import

Review your import information and click Start Import.

Your selections:

- Ecomm Customers ✓
- Add new records ✓

Your import will include:

Mapped fields: 8

Your import will not include:

Unmapped fields: 0

Buttons: Cancel, Previous, Start Import

Review & Start Import

Review your import information and click Start Import.

Your selections:

- Ecomm Customers ✓
- Add new records ✓

Your import will include:

Mapped fields: 8

Your import will not include:

Unmapped fields: 0

Modal: Congratulations, your import has started! Click OK to view your import status on the Bulk Data Load Job page.

Buttons: Cancel, Previous, Start Import

View your completed import

Bulk Data Load Jobs

Bulk Data Load Job Detail

Job ID	7508200000gTaK	Job Type	Bulk V1	Status	Closed
Submitted By	Malia Young	Operation	Insert	Total Processing Time (ms)	1439
Start Time	10/10/2022, 3:00 PM PST	Queued Batches	0	API Active Processing Time (ms)	929
End Time	10/10/2022, 3:00 PM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:07	Completed Batches	1		
Object	Ecomm Customer	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	500		
Concurrency Mode	Parallel	Records Failed	3		
API Version	55.0	Retries	0		

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	7518200000w9r9	10/10/2022, 3:00 PM	10/10/2022, 3:00 PM	1439	929	0	500	3	0		Completed

Create a Profile in Salesforce

Click the gear icon and click Setup

Type Profiles in Quick find and click Profiles

The screenshot shows the Salesforce Setup Home page. The left sidebar has a search bar with 'profile' entered. Under the 'Users' category, 'Profiles' is selected. The main content area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a 'Most Recently Used' section with a table of items.

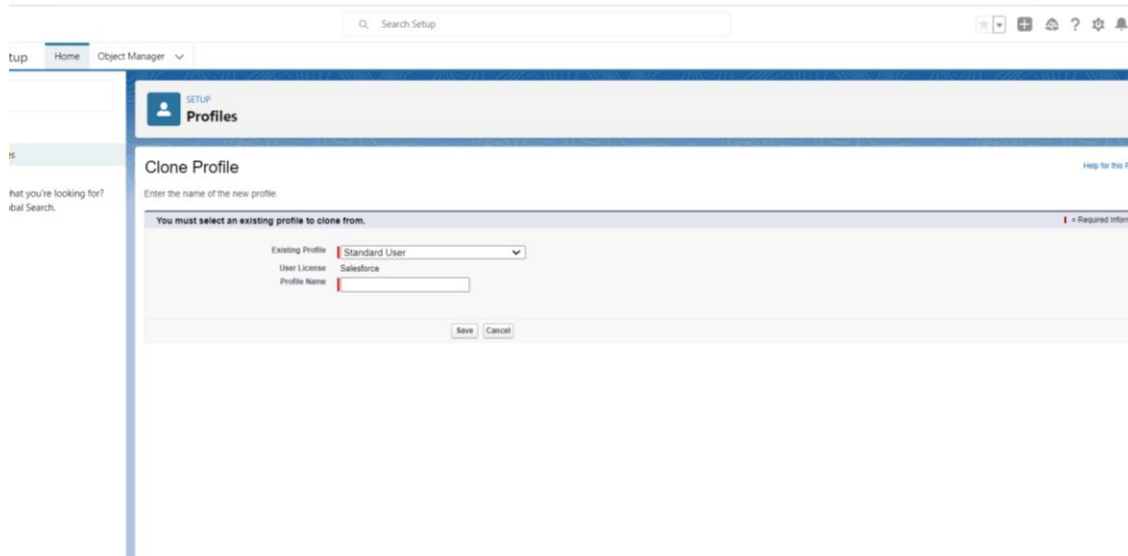
NAME	TYPE	OBJECT
Preferred Payment methods	Custom Report Type	
Account Record Page	Lightning Page	

Click Create New Profile

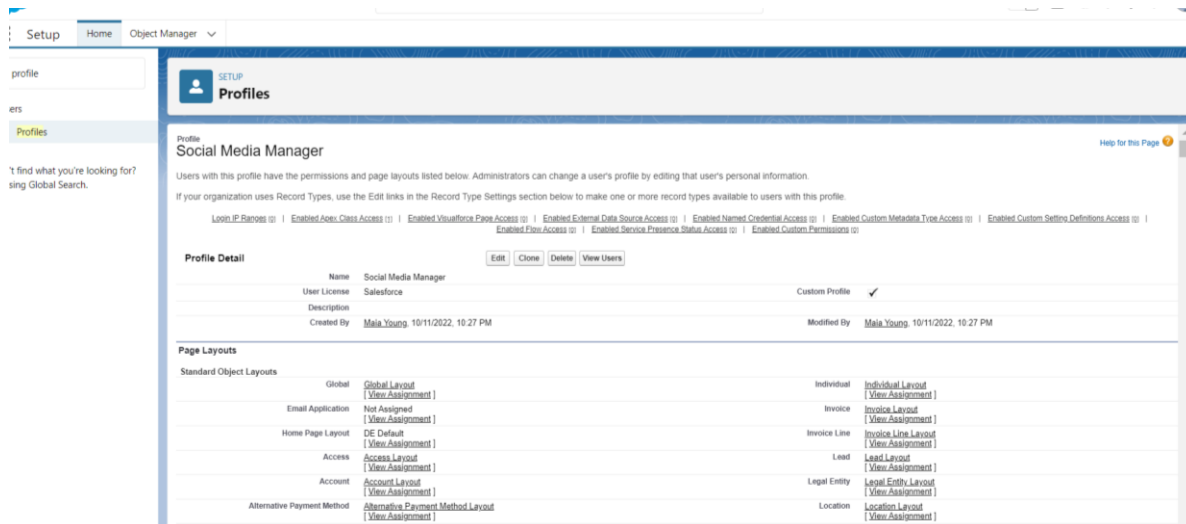
The screenshot shows the Salesforce Setup Profiles page. The 'Clone Profile' form is visible, showing a dropdown menu for 'Existing Profile' set to 'Analytics Cloud Integration User'. The 'User License' and 'Profile Name' fields are also visible.

Existing Profile	Analytics Cloud Integration User
User License	Analytics Cloud Integration User
Profile Name	

Click a profile to clone from



Enter a Profile Name and click Save



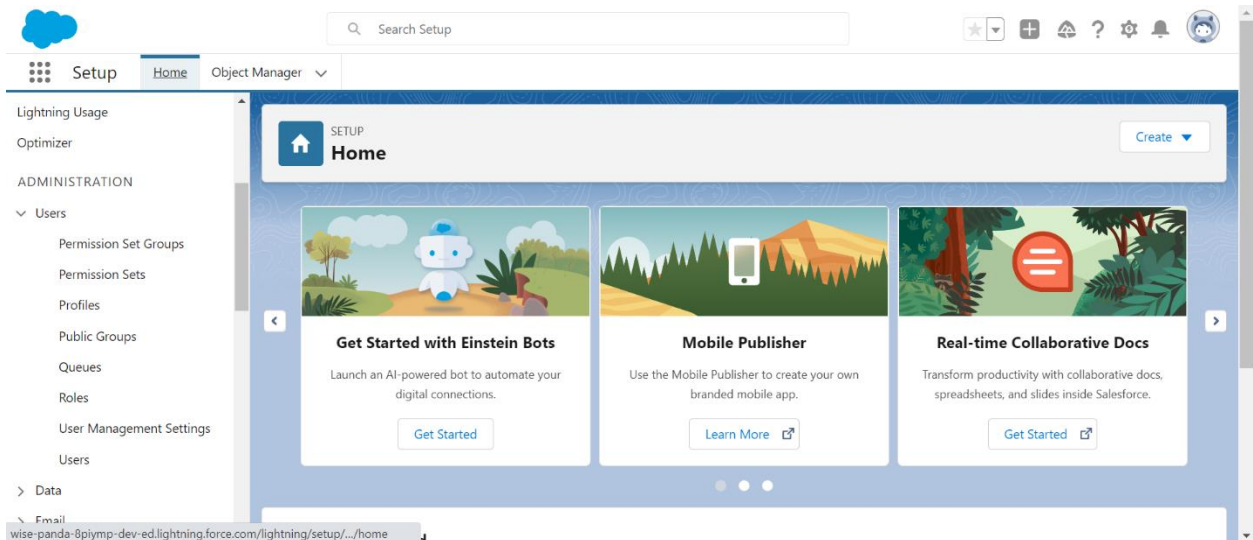
You can edit Permissions and Layouts.

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**

sec Help for this Page

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: sec [Edit](#) [Create New View](#)

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**

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter_Expert	Chatter	chatty.00d8c000008axkoeai_uvobjdjocftu@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	User_Integration	integ	integration@00d8c000008axkoeai.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightsssecurity@00d8c000008axkoeai.com		✓	Analytics Cloud Security User
<input type="checkbox"/>	Edit	Young_Maia	MYoun	maiayoung2@wise-panda-8b9ymo.com		✓	System Administrator

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

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**

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.

The screenshot shows the 'New User' form in the Salesforce Setup interface. The form is titled 'New User' and is part of the 'Users' section under 'ADMINISTRATION'. It contains a 'General Information' section with various input fields. Fields marked with a red border indicate they are mandatory. The 'Role' dropdown is set to '<None Specified>', 'User License' is 'Identity', and 'Profile' is 'Identity User'. The 'Active' checkbox is checked. Below the 'General Information' section, there are several radio button options for user types: Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, and Site.com Publisher User. The left sidebar shows the navigation menu with 'Users' selected.

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

The screenshot shows the 'New User' form in the Salesforce Setup interface, specifically the 'Locale Settings' and 'Approver Settings' sections. The 'Locale Settings' section includes fields for Time Zone (GMT-05:00 Eastern Standard Time (America/Panama)), Locale (English (United States)), Language (English), and Currency (USD - U.S. Dollar). The 'Approver Settings' section includes fields for Delegated Approver, Manager, and Receive Approval Request Emails (Only if I am an approver). The 'Generate new password and notify user immediately' checkbox is checked. The left sidebar shows the navigation menu with 'Users' selected.

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.

User Detail		Role	
Name	Buffy Jackson	Marketing User	<input type="checkbox"/>
Alias	bjack	Identity User	<input checked="" type="checkbox"/>
Email	buffyjackson@badside.us	Offline User	<input type="checkbox"/>
Username	buffyjackson@badside.us	Knowledge User	<input type="checkbox"/>
Nickname	User16636724606613916106	Flow User	<input type="checkbox"/>
Title		Service Cloud User	<input type="checkbox"/>
Company		Site.com Contributor User	<input type="checkbox"/>
Department		Site.com Publisher User	<input type="checkbox"/>
Division			
Address			
Time Zone	(GMT-05:00) Eastern Standard Time (America/Panama)		

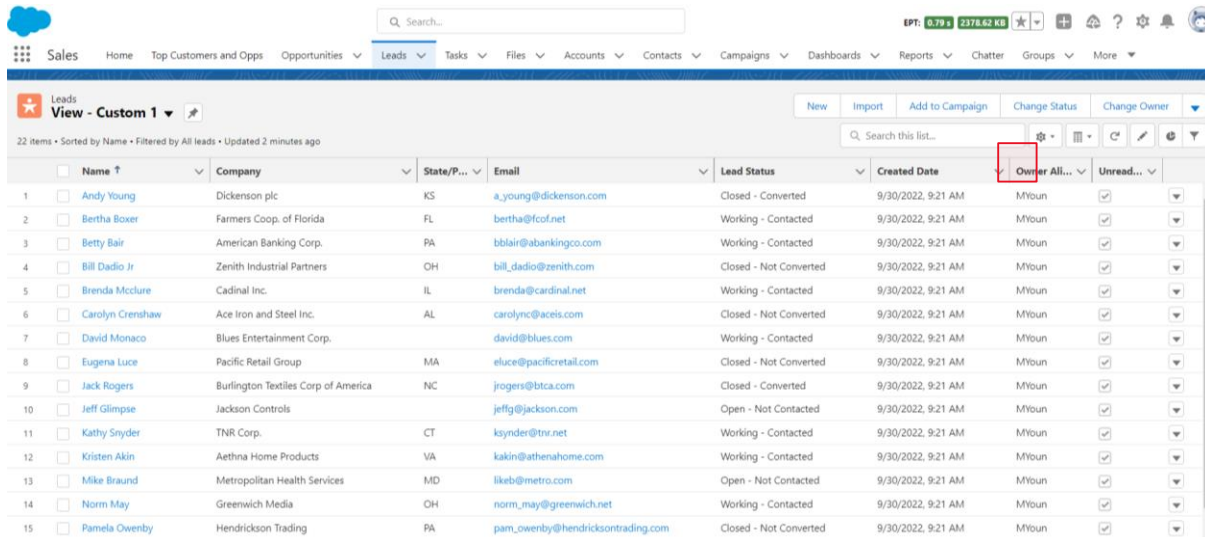
To Deactivate a **User** click on edit and uncheck the **Active** box and click Save to make the user inactive.

The screenshot shows the Salesforce 'User Edit' interface for a user named Buffy Jackson. The left sidebar contains navigation options: Lightning Usage, Optimizer, ADMINISTRATION (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), Data, Email, PLATFORM TOOLS, and Apps. The main content area is titled 'User Edit' and shows the user's details. The 'Active' checkbox is unchecked, indicating the user is inactive. The 'Role' is 'Marketing Team', 'User License' is 'Identity', and 'Profile' is 'Identity User'. The 'Save' button is highlighted.

General Information	
First Name	Buff
Last Name	Jackson
Alias	bjack
Email	buffyjackson@badside.us
Username	buffyjackson@badside.us
Nickname	User166367246066139161
Title	
Company	
Department	
Division	
Role	Marketing Team
User License	Identity
Profile	Identity User
Active	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>

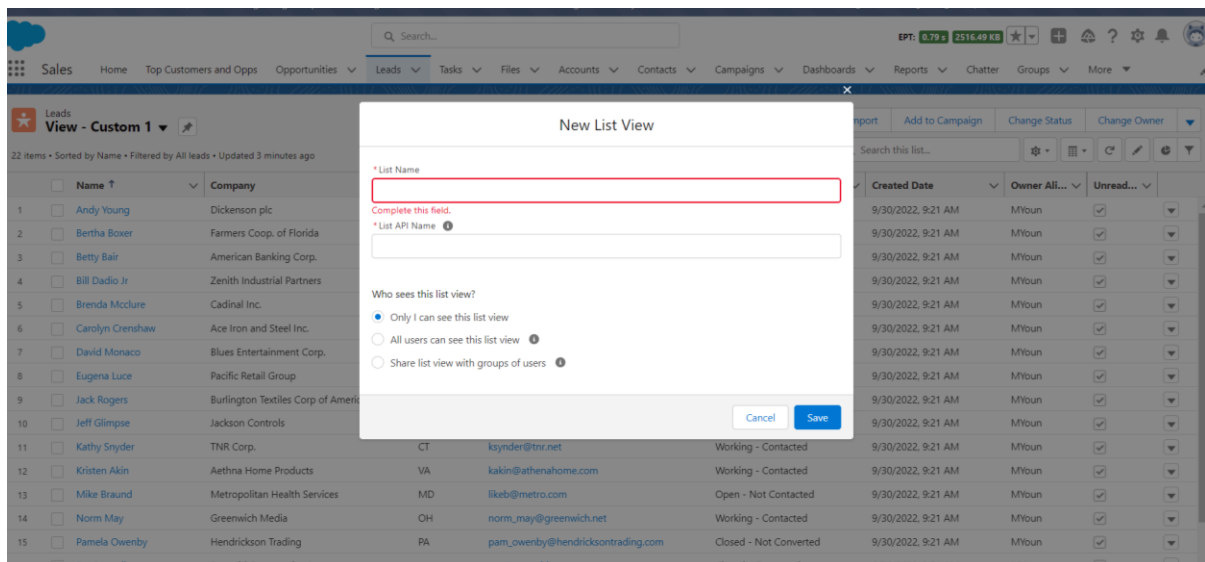
Create List View Customizations

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



The screenshot shows the Salesforce Leads list view. The table has columns for Name, Company, State/P..., Email, Lead Status, Created Date, Owner All..., and Unread... The gear icon in the 'Owner All...' column header is highlighted with a red box.

	Name ↑	Company	State/P...	Email	Lead Status	Created Date	Owner All...	Unread...
1	Andy Young	Dickenson plc	KS	a_young@dickenson.com	Closed - Converted	9/30/2022, 9:21 AM	M'Youn	✓
2	Bertha Boxer	Farmers Coop. of Florida	FL	bertha@fcof.net	Working - Contacted	9/30/2022, 9:21 AM	M'Youn	✓
3	Betty Bair	American Banking Corp.	PA	bblair@abankingco.com	Working - Contacted	9/30/2022, 9:21 AM	M'Youn	✓
4	Bill Dadio Jr	Zenith Industrial Partners	OH	bill_dadio@zenith.com	Closed - Not Converted	9/30/2022, 9:21 AM	M'Youn	✓
5	Brenda McClure	Cadinal Inc.	IL	brenda@cardinal.net	Working - Contacted	9/30/2022, 9:21 AM	M'Youn	✓
6	Carolyn Crenshaw	Ace Iron and Steel Inc.	AL	carolync@aceis.com	Closed - Not Converted	9/30/2022, 9:21 AM	M'Youn	✓
7	David Monaco	Blues Entertainment Corp.		david@blues.com	Working - Contacted	9/30/2022, 9:21 AM	M'Youn	✓
8	Eugena Luce	Pacific Retail Group	MA	eluce@pacificretail.com	Closed - Not Converted	9/30/2022, 9:21 AM	M'Youn	✓
9	Jack Rogers	Burlington Textiles Corp of America	NC	jrogers@btca.com	Closed - Converted	9/30/2022, 9:21 AM	M'Youn	✓
10	Jeff Glimpse	Jackson Controls		jeffg@jackson.com	Open - Not Contacted	9/30/2022, 9:21 AM	M'Youn	✓
11	Kathy Snyder	TNR Corp.	CT	ksnyder@tnr.net	Working - Contacted	9/30/2022, 9:21 AM	M'Youn	✓
12	Kristen Akin	Aethna Home Products	VA	kakin@athenahome.com	Working - Contacted	9/30/2022, 9:21 AM	M'Youn	✓
13	Mike Braund	Metropolitan Health Services	MD	likeb@metro.com	Open - Not Contacted	9/30/2022, 9:21 AM	M'Youn	✓
14	Norm May	Greenwich Media	OH	norm_may@greenwich.net	Working - Contacted	9/30/2022, 9:21 AM	M'Youn	✓
15	Pamela Owenby	Hendrickson Trading	PA	pam_owenby@hendricksontrading.com	Closed - Not Converted	9/30/2022, 9:21 AM	M'Youn	✓



The screenshot shows the 'New List View' dialog box. It has two input fields: '* List Name' and '* List API Name'. Below these fields are three radio button options for visibility: 'Only I can see this list view' (selected), 'All users can see this list view', and 'Share list view with groups of users'. There are 'Cancel' and 'Save' buttons at the bottom.

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.

The screenshot shows a 'Rename List View' dialog box in a CRM application. The dialog contains the following information:

- List Name:** High Priority Leads
- List API Name:** High_Priority_Leads
- Who sees this list view?:** All users can see this list view

The background shows a list of 22 items, sorted by Name, filtered by My leads. The list has columns for Name, Email, Company, State/P..., Lead Status, Unread..., and Owner All... The list items include names like Andy Young, Bertha Boxer, Betty Blair, etc.

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.

The screenshot shows the 'High Priority Leads' list view in the CRM application. The 'LIST VIEW CONTROLS' menu is open, and the 'Select Fields to Display' option is highlighted with a red box. The list view shows columns for Name, Email, Company, State/P..., Lead Status, Unread..., and Owner All... The list items include names like Andy Young, Bertha Boxer, Betty Blair, etc.

Search...

EPT: 1.73 v 1652.05 KB

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	Visible Fields
Annual Revenue	Company
City	State/Province
Clean Status	Lead Status
Company D-U-N-S Number	Unread By Owner
Converted	Created Date
Country	Owner Alias

Cancel Save

Name	Email	Company	State	Lead Status	Unread	Created Date	Owner	
1	Andy Young	a_young@dickenson.com			<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun	
2	Bertha Boxer	bertha@fcf.net			<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun	
3	Betty Bair	bblair@abankingco.com			<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun	
4	Bill Dadio Jr	bill_dadio@zenith.com			<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun	
5	Brenda McClure	brenda@cardinal.net			<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun	
6	Carolyn Crenshaw	carolync@aceis.com			<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun	
7	David Monaco	david@blues.com			<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun	
8	Eugena Luce	eluce@pacificretail.com			<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun	
9	Jack Rogers	jrogers@btca.com			<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun	
10	Jeff Glimpse	jeffg@jackson.com			<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun	
11	Kathy Snyder	ksnyder@tnr.net	TNR Corp.	CT	Working - Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
12	Kristen Akin	kakin@athenahome.com	Aethna Home Products	VA	Working - Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
13	Mike Braund	likeb@metro.com	Metropolitan Health Services	MD	Open - Not Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
14	Norm May	norm_may@greenwich.net	Greenwich Media	OH	Working - Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
15	Pamela Owenby	pam_owenby@hendricksontrading.com	Hendrickson Trading	PA	Closed - Not Converted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun

Search...

EPT: 1.73 v 4395.19 KB

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

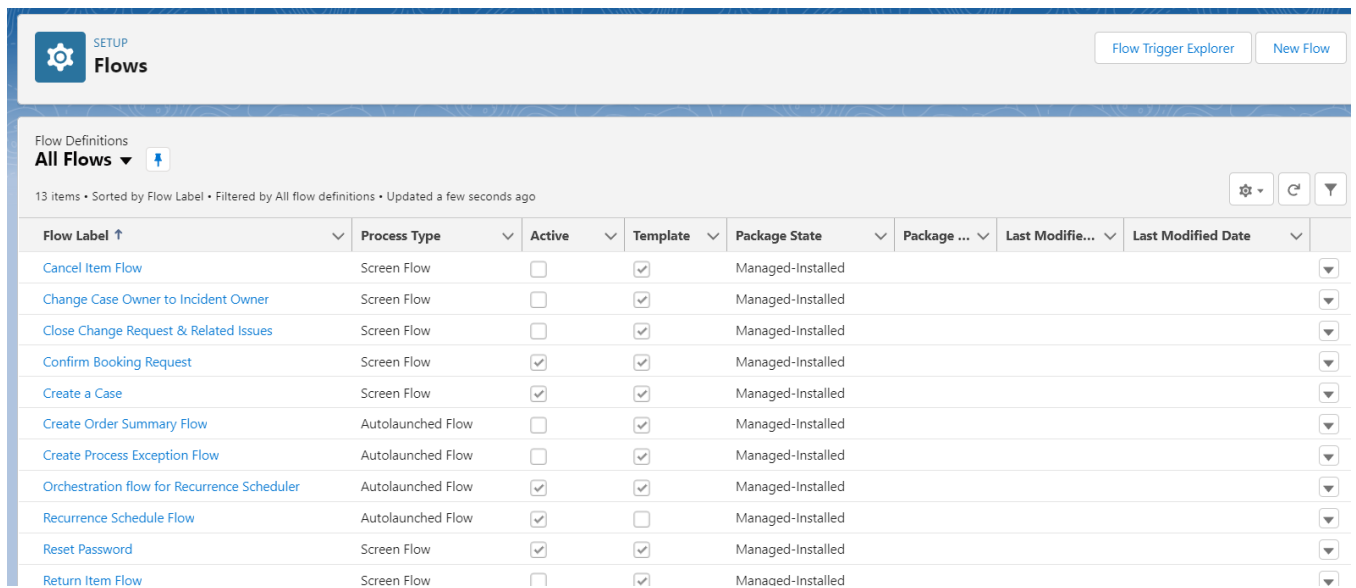
New Import Add to Campaign Change Status Change Owner

Search this list...

Name	Email	Company	State	Lead Status	Unread	Created Date	Conv...	Owner
1	Andy Young	a_young@dickenson.com	Dickenson plc	KS	Closed - Converted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
2	Bertha Boxer	bertha@fcf.net	Farmers Coop. of Florida	FL	Working - Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
3	Betty Bair	bblair@abankingco.com	American Banking Corp.	PA	Working - Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
4	Bill Dadio Jr	bill_dadio@zenith.com	Zenith Industrial Partners	OH	Closed - Not Converted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
5	Brenda McClure	brenda@cardinal.net	Cadinal Inc.	IL	Working - Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
6	Carolyn Crenshaw	carolync@aceis.com	Ace Iron and Steel Inc.	AL	Closed - Not Converted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
7	David Monaco	david@blues.com	Blues Entertainment Corp.		Working - Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
8	Eugena Luce	eluce@pacificretail.com	Pacific Retail Group	MA	Closed - Not Converted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
9	Jack Rogers	jrogers@btca.com	Burlington Textiles Corp of America	NC	Closed - Converted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
10	Jeff Glimpse	jeffg@jackson.com	Jackson Controls		Open - Not Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
11	Kathy Snyder	ksnyder@tnr.net	TNR Corp.	CT	Working - Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
12	Kristen Akin	kakin@athenahome.com	Aethna Home Products	VA	Working - Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
13	Mike Braund	likeb@metro.com	Metropolitan Health Services	MD	Open - Not Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
14	Norm May	norm_may@greenwich.net	Greenwich Media	OH	Working - Contacted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
15	Pamela Owenby	pam_owenby@hendricksontrading.com	Hendrickson Trading	PA	Closed - Not Converted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun
16	Pat Stumuller	pat@pyramid.net	Pyramid Construction Inc.		Closed - Converted	<input checked="" type="checkbox"/>	9/30/2022, 9:21 AM	MYoun

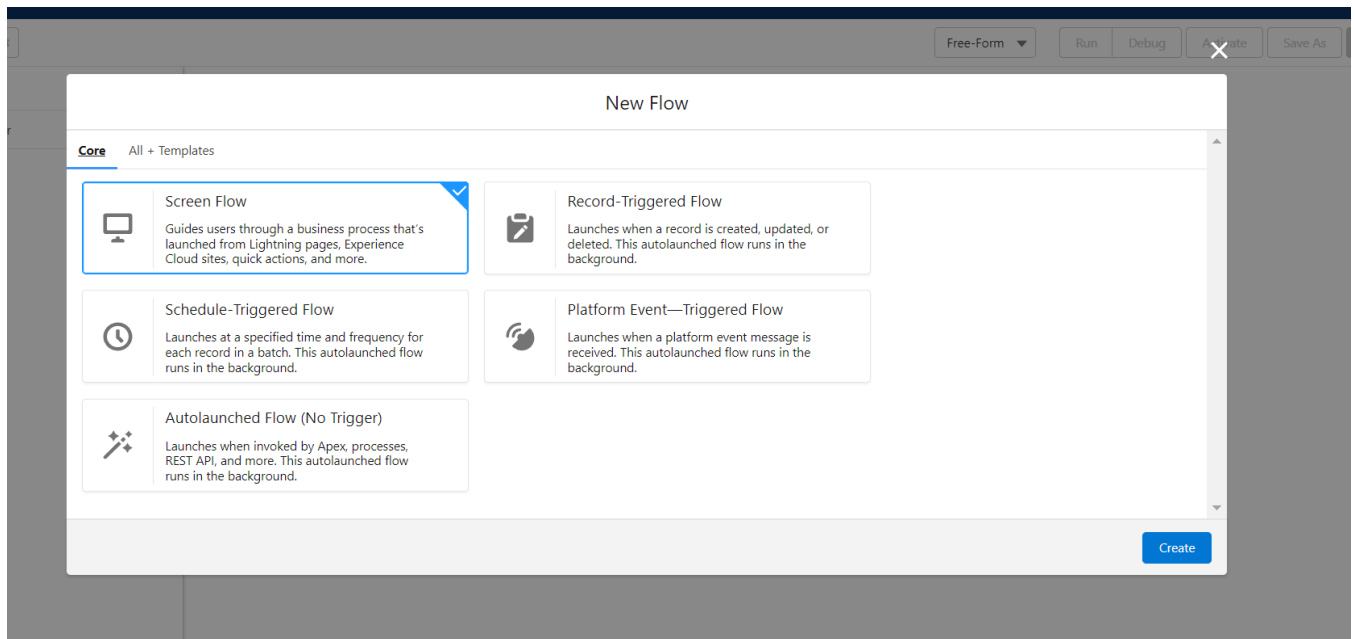
Create a Timesheet Screen Flow

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



Flow Label ↑	Process Type	Active	Template	Package State	Package ...	Last Modifie...	Last Modified Date
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Confirm Booking Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Order Summary Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Process Exception Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Orchestration flow for Recurrence Scheduler	Autolaunched Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Recurrence Schedule Flow	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Reset Password	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Return Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

Select Screen Flow -> Click Next



Free-Form ▾ Run Debug ~~Activate~~ Save As

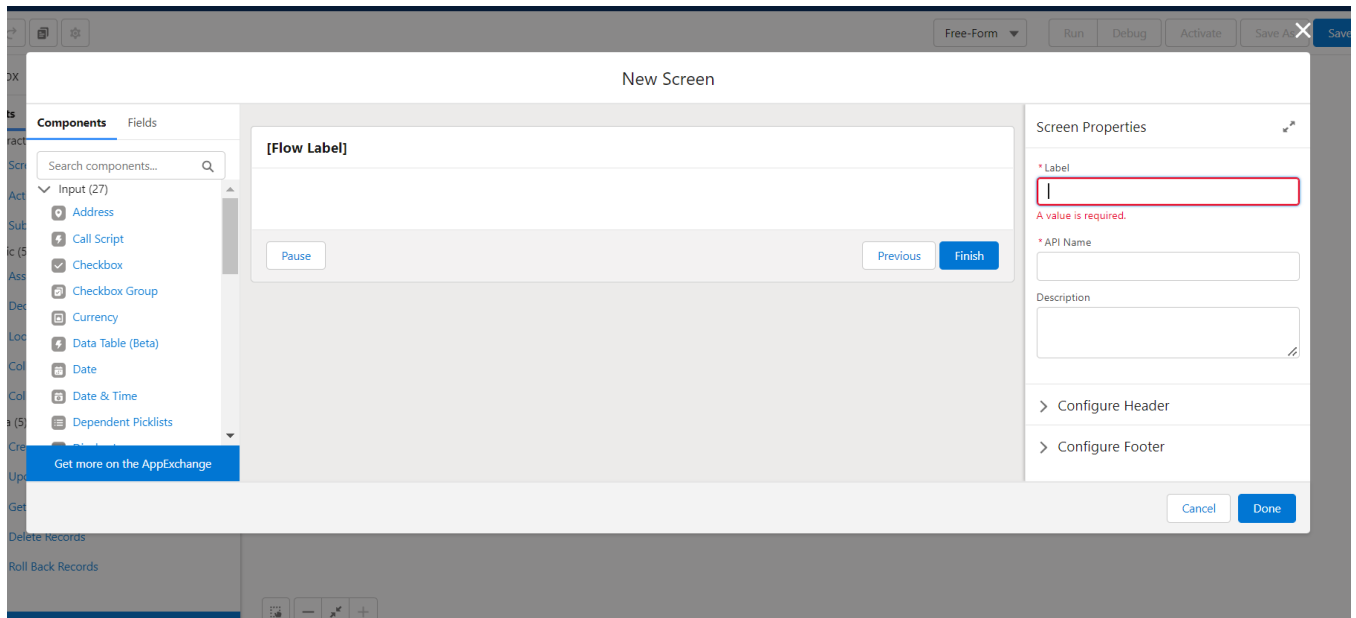
New Flow

Core All + Templates

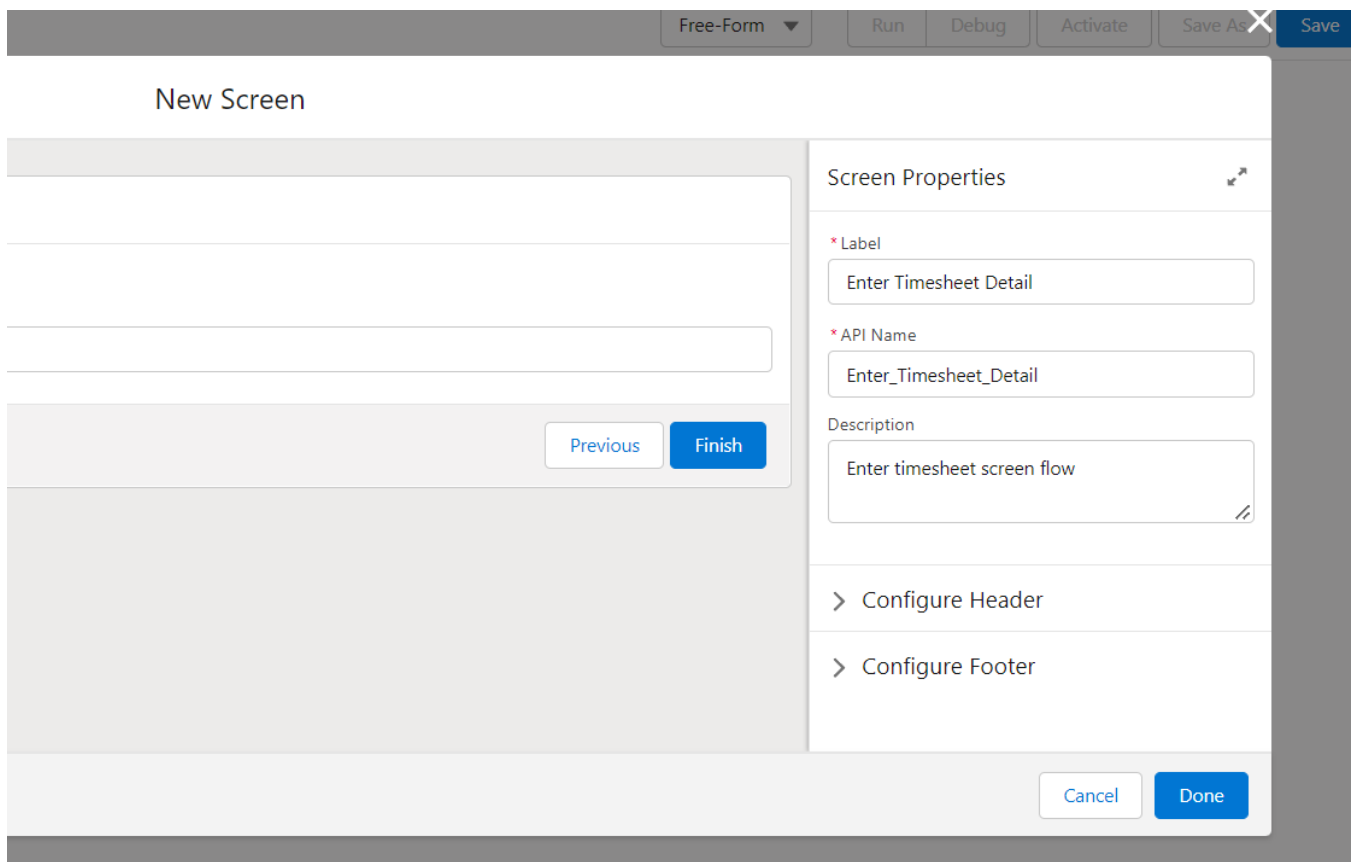
- Screen Flow** (Selected)
 - Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
- Record-Triggered Flow
 - Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
- Schedule-Triggered Flow
 - Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
- Platform Event—Triggered Flow
 - Launches when a platform event message is received. This autolaunched flow runs in the background.
- Autolaunched Flow (No Trigger)
 - Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

Create

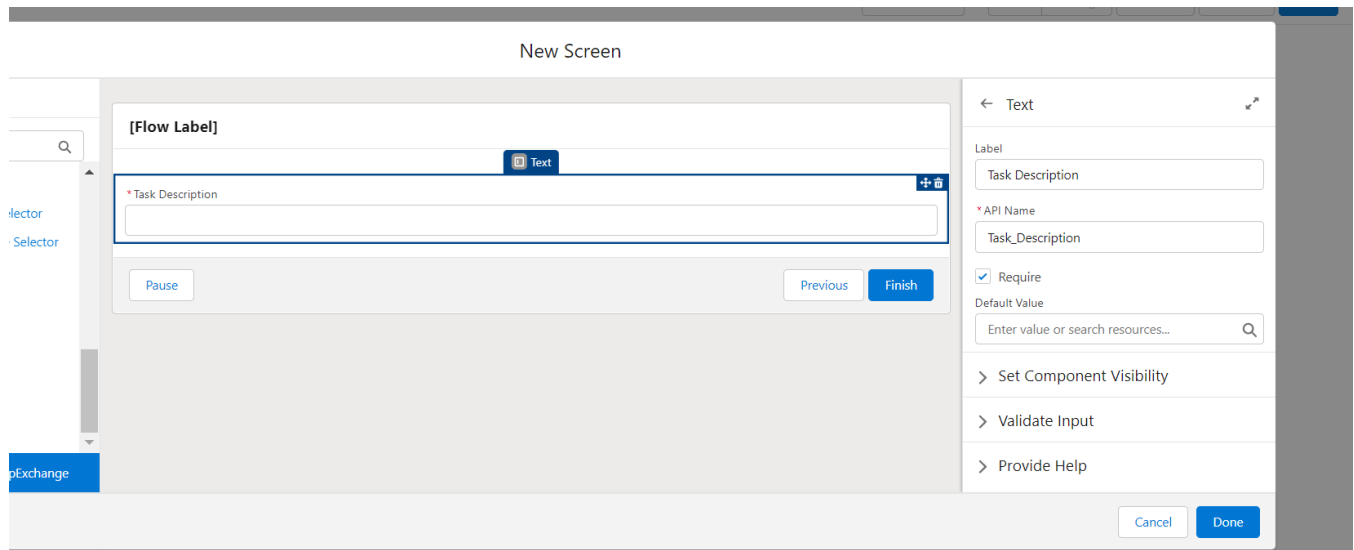
Click the drop-down and select Free Form -> Drag Screen from the side panel into the window



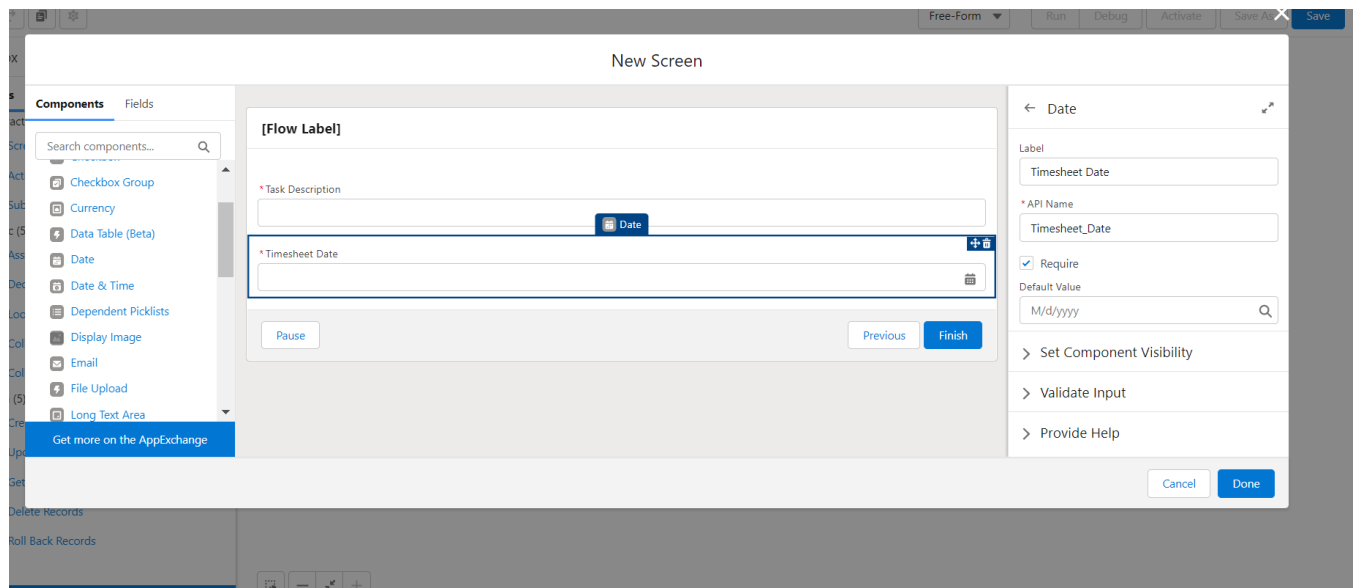
Fill in Screen properties -> Label is Enter Timesheet Detail, be sure to add a description



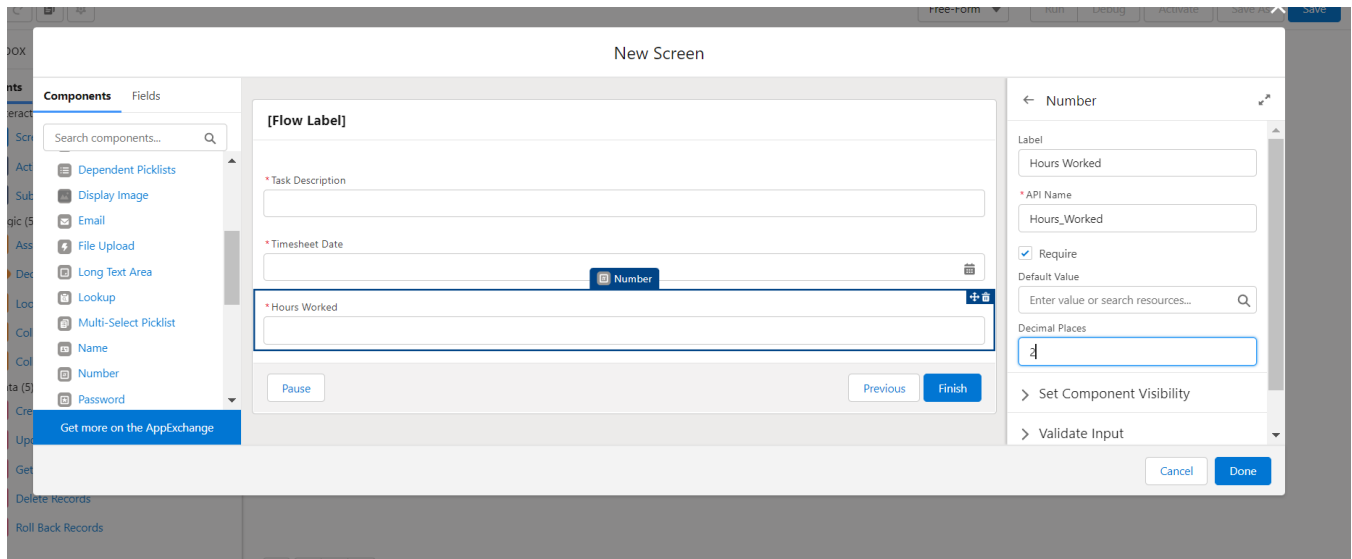
Next Drag and drop Text from the components panel into the Flow Label area -> Fill out Label as Task Description -> check the Required box



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



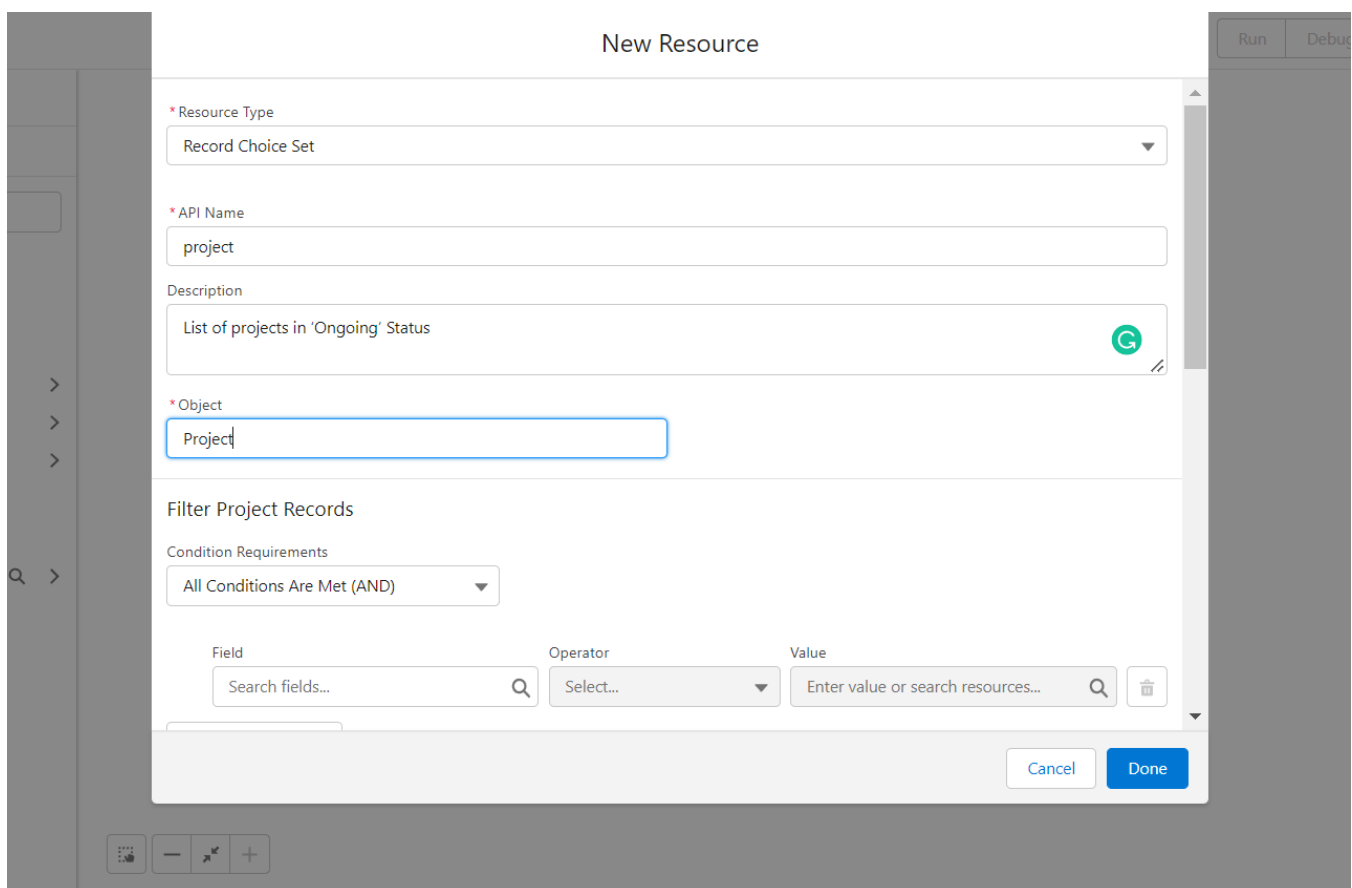
Next will be a Number so click number and add it to the screen -> Label it Hours Worked -> make it Required and add 2 decimal places



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

New Resource

* Resource Type
Record Choice Set

* API Name
project

Description
List of projects in 'Ongoing' Status

* Object
Project

Filter Project Records

Condition Requirements
All Conditions Are Met (AND)

Field	Operator	Value
Project_Status__c	Equals	Ongoing

Cancel 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

The screenshot shows a 'New Resource' configuration window. The fields are filled as follows:

- * Resource Type:** Record Choice Set
- * API Name:** Users
- Description:** Pull all active users with company
- * Object:** User
- Filter User Records:**
 - Condition Requirements:** All Conditions Are Met (AND)
 - Field:** IsActive
 - Operator:** Equals
 - Value:** True

Buttons for 'Cancel' and 'Done' are visible at the bottom right of the dialog.

Run
Debug

New Resource

Field	Operator	Value
AND <input style="width: 150px;" type="text" value="CompanyName"/>	<input style="width: 80px;" type="text" value="Equals"/> ▼	<input style="width: 150px;" type="text" value="Badside Realty"/> ✕
+ Add Condition		

Sort User Records

Sort Order: ▼

* Sort By:

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:

* Data Type: ▼

Choice Value:

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

* Data Type

 ▼

Choice Value

Store More User Field Values

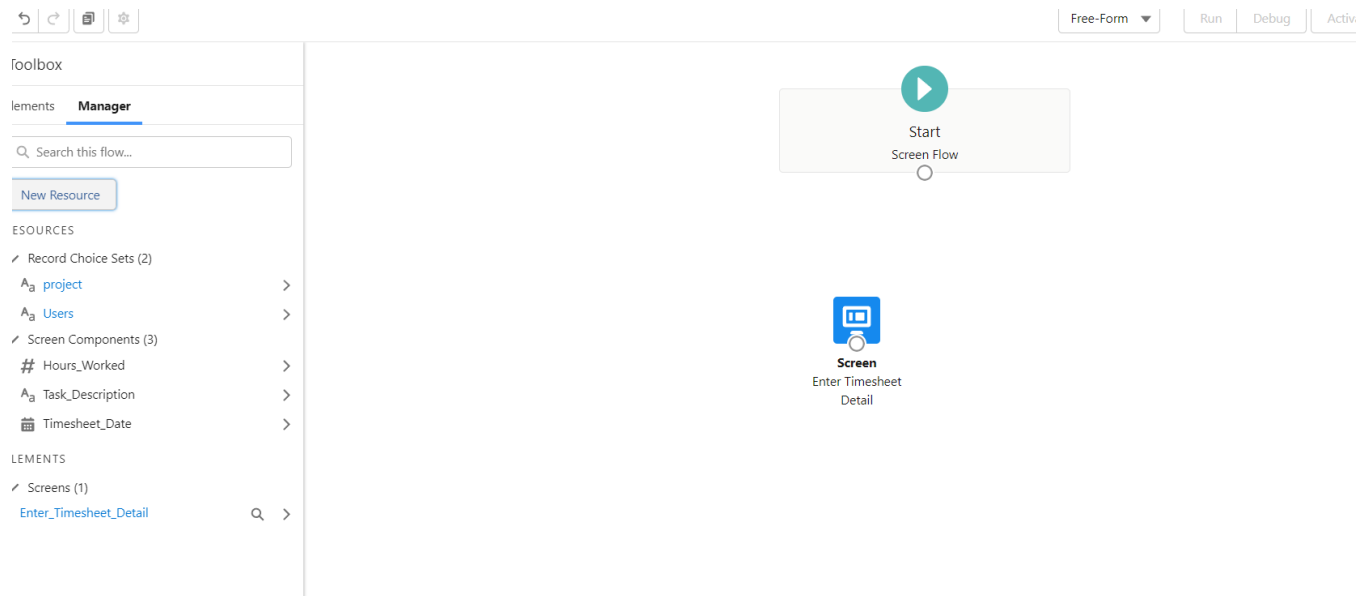
When the flow user selects the choice in a screen, these field values are assigned to the selected variables.

Field

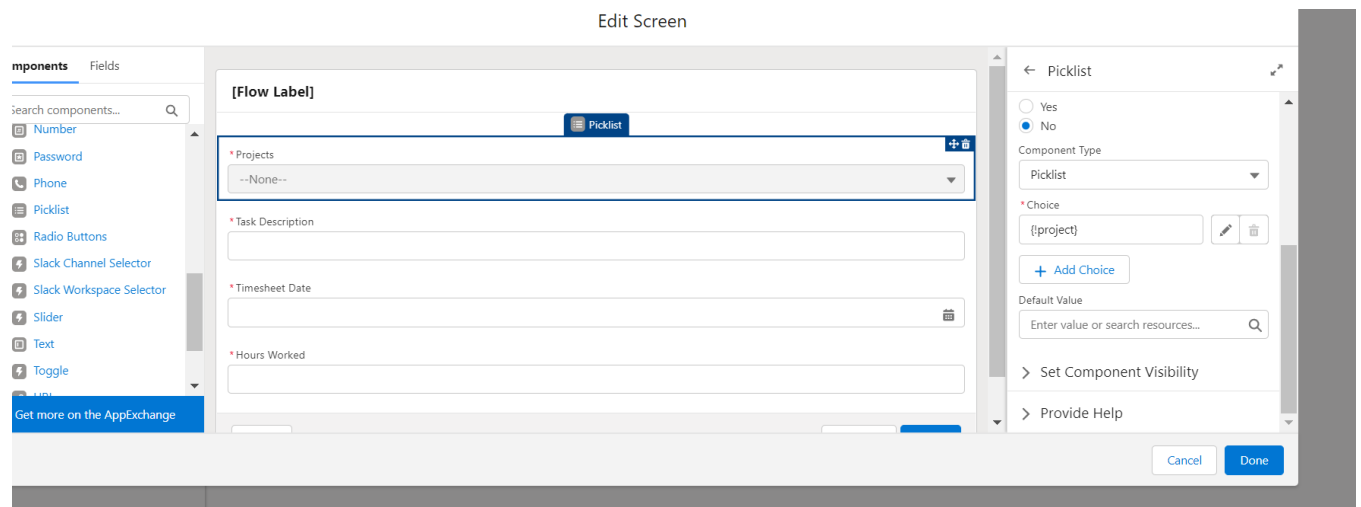
Variable

→

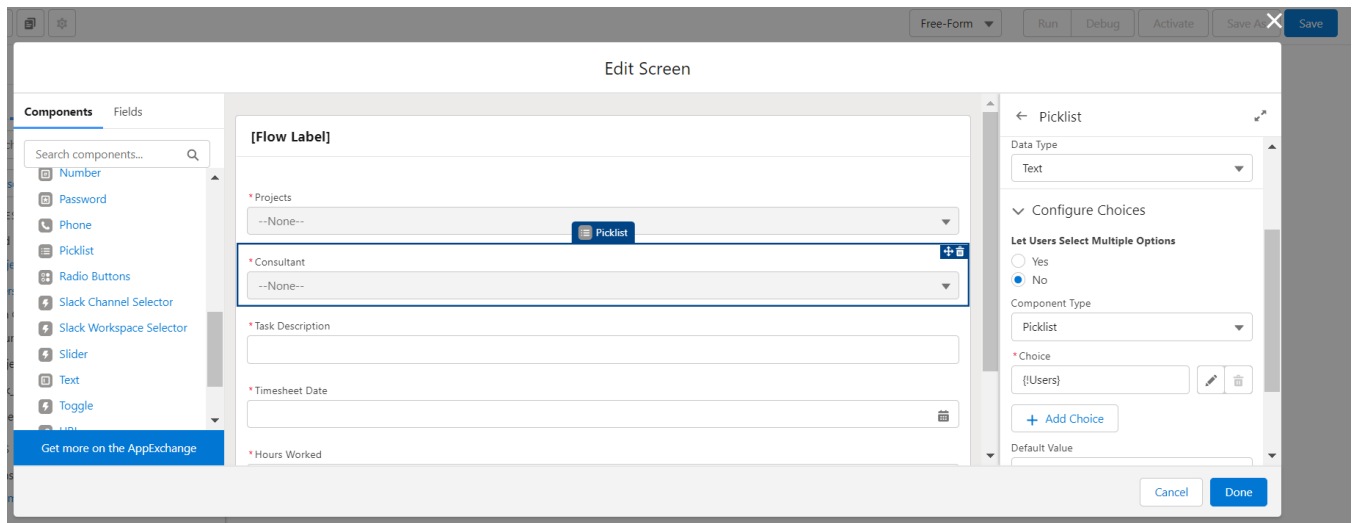
+ Add Field
Cancel
Done



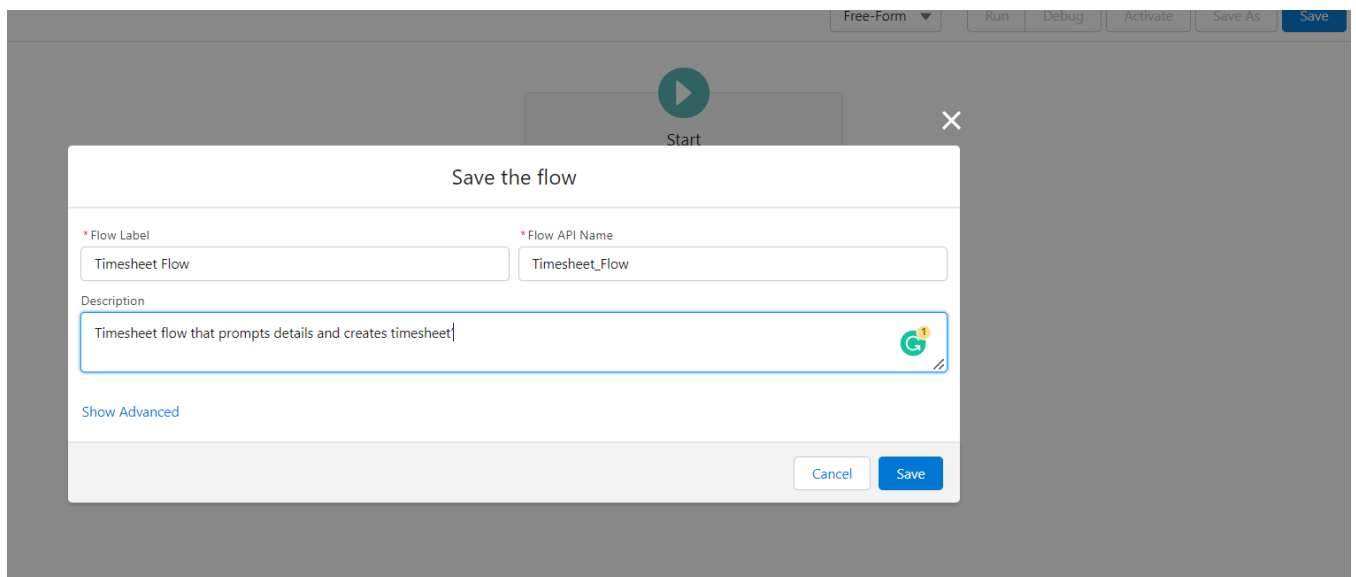
Double the screen-> Add Picklist above task Description field -> Label it Projects -> Data Type is Text -> no Default value -> Choice is Projects -> Done



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

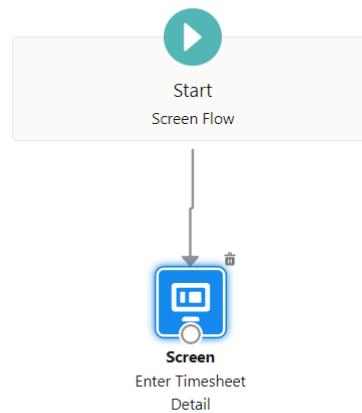


Click Save -> Label it Timesheet Flow -> Description "Timesheet flow that prompts details and creates timesheet"- > Click Save



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.

Free-Form version 1: inactive—Last modified a few seconds ago Run Debug Activate



Click Run to see what you have in the fields

Timesheet Flow

Projects	--None--
Task Description	
Timesheet Date	
Hours Worked	

[Finish](#)

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

Cancel Done

New Create Records

*Object: Timesheet

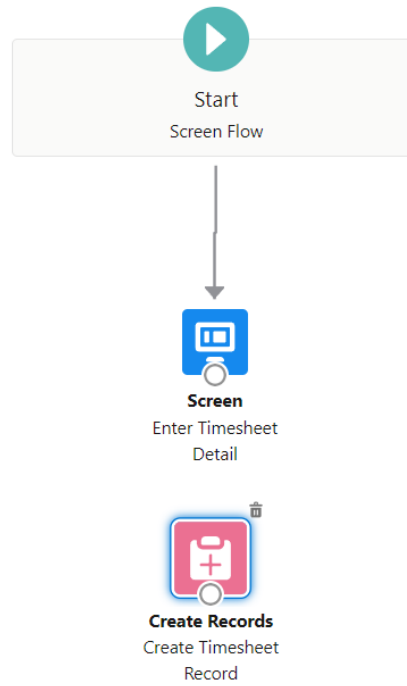
Set Field Values for the Timesheet

Field	Value
Consultant__c	A Consultant X
Project_Name__c	A Projects X
Task_Date__c	Timesheet_Date X
Task_Description__c	A Task_Description X
Total_Hours__c	# Hours_Worked X

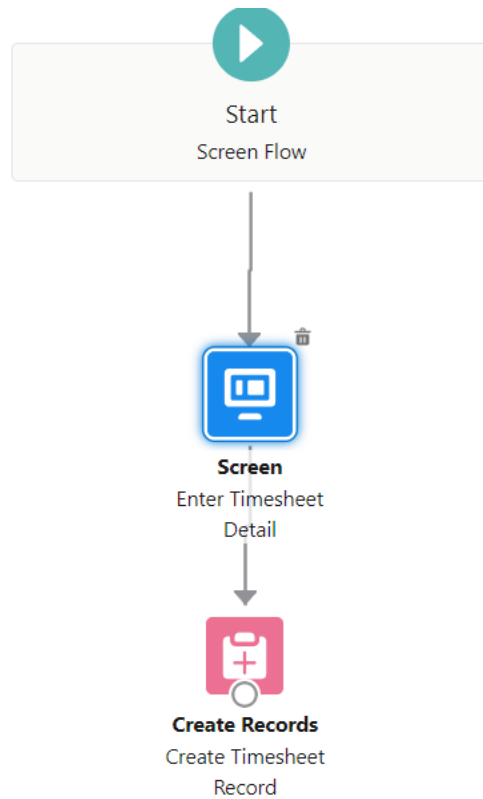
+ Add Field

Manually assign variables

Cancel Done

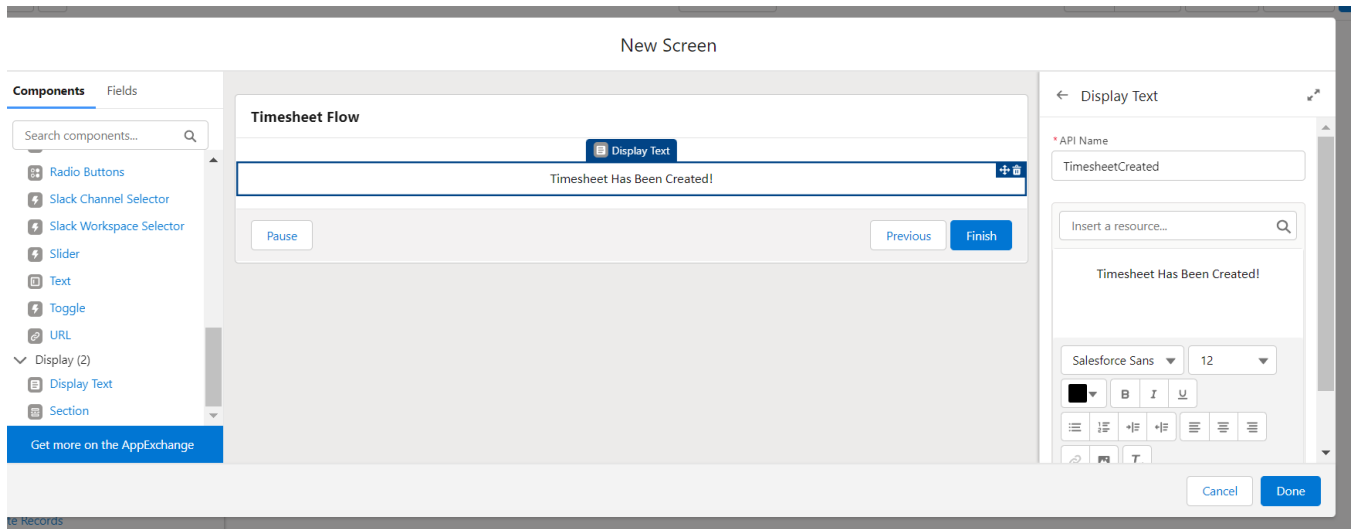


Now let's connect them. Drag the circle from the Screen element to the circle on the Create records element

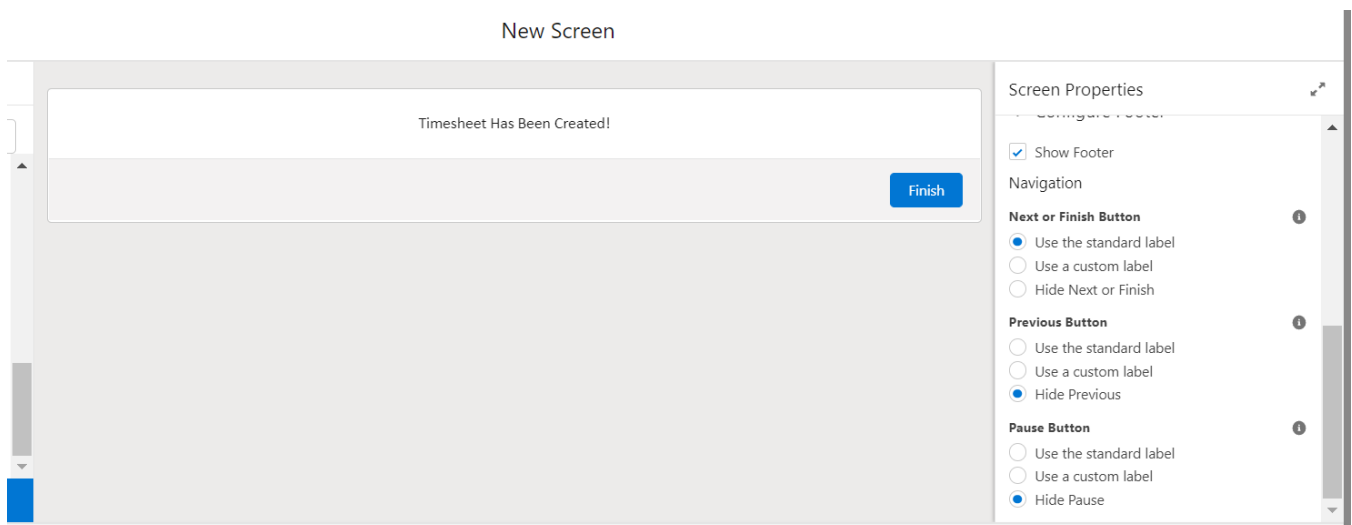


Last Component is another screen component which will be the confirmation that the timesheet was created.

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



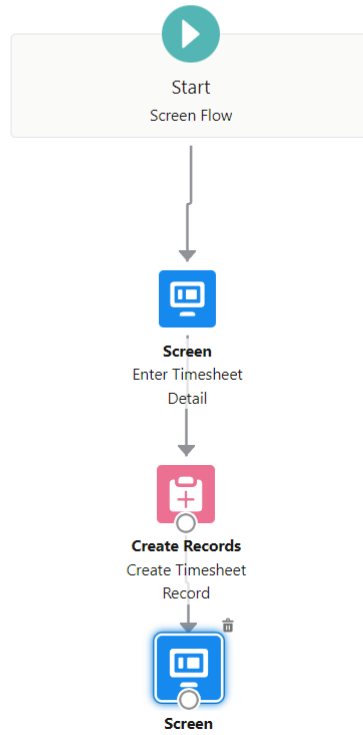
Under Screen Properties label it Timesheet Created and hide the Header -> Select Navigation and Hide Previous and Hide Pause -> Click Done



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



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

Timesheet Has Been Created!

Finish

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

Related Details

Timesheets (5) New				
Task Date	Task Description	Total Hours	Invoiced	
10/22/2022		6.50	<input type="checkbox"/>	▼
10/12/2022		15.00	<input type="checkbox"/>	▼
9/6/2022		7.00	<input type="checkbox"/>	▼
9/28/2022		8.00	<input type="checkbox"/>	▼
10/23/2022	Data migration account contacts and ...	5.00	<input type="checkbox"/>	▼
View All				

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 Help for this Page ?

Timesheet Flow

[Back to List: Flows](#)

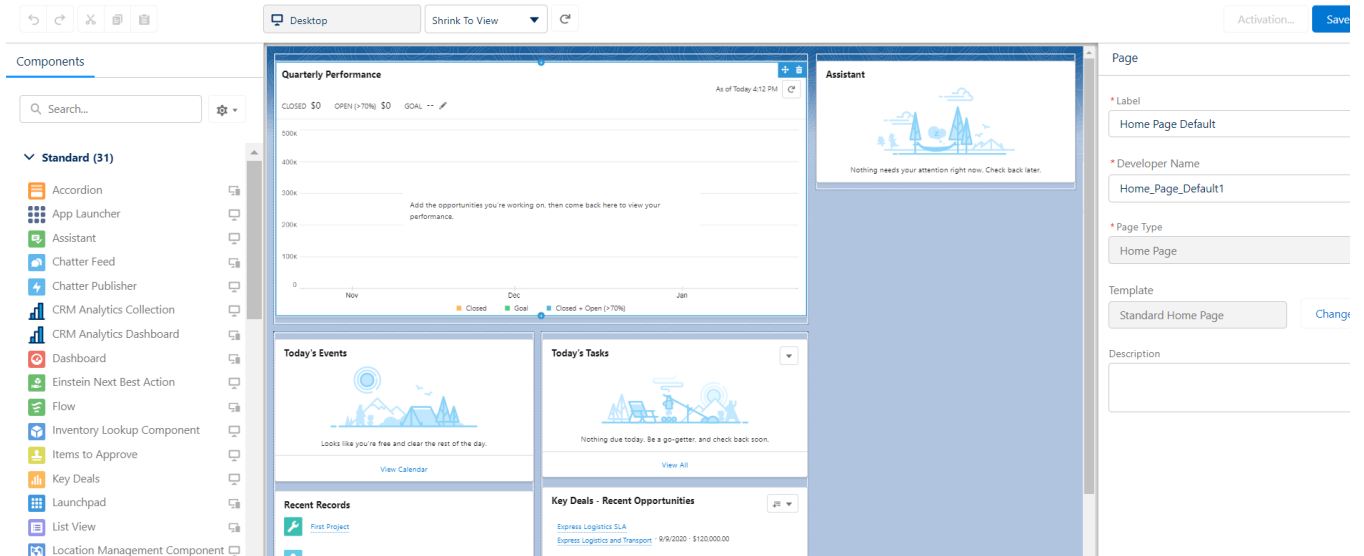
Flow Detail Edit Open Run Delete

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

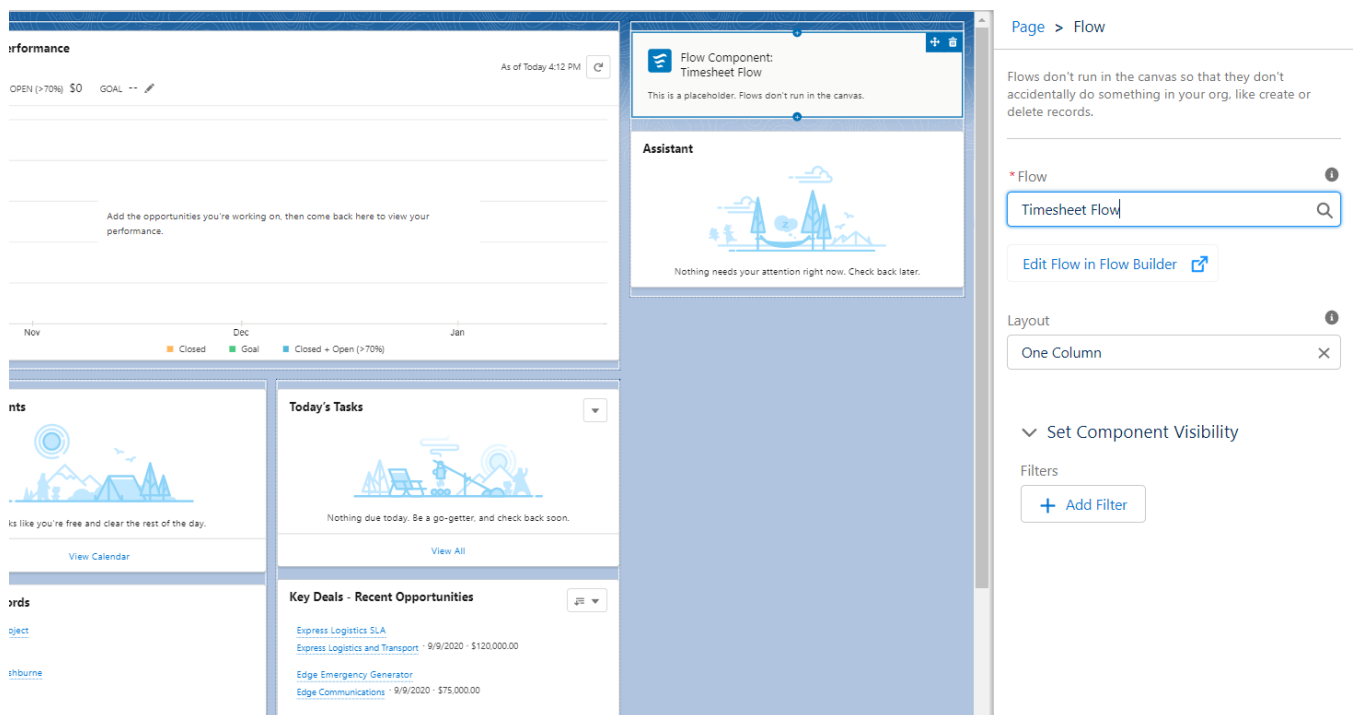
Flow Versions

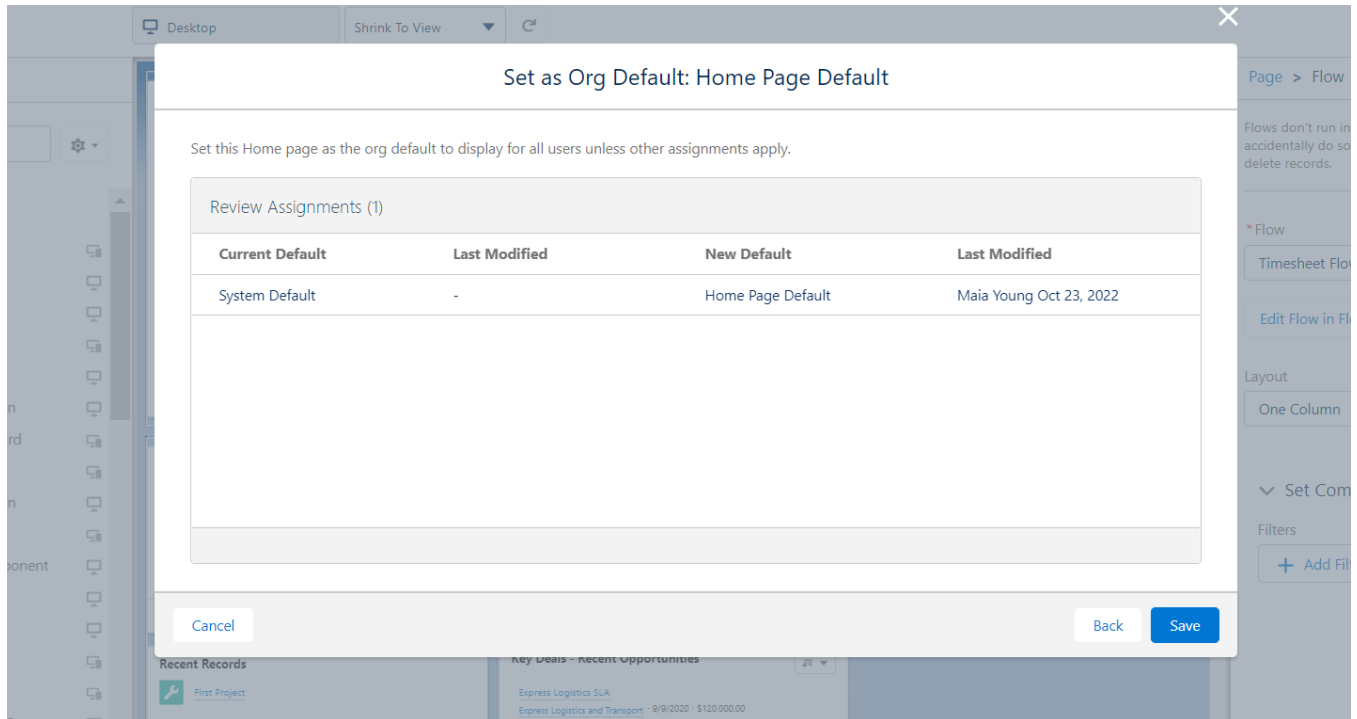
Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Run in Mode	API Version for Running the Flow
Open Run Deactivate	Timesheet Flow	1	Timesheet flow that prompts details and creates timesheet	Flow Builder	10/23/2022, 3:56 PM	Screen Flow	Active	Default Mode	56.0

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

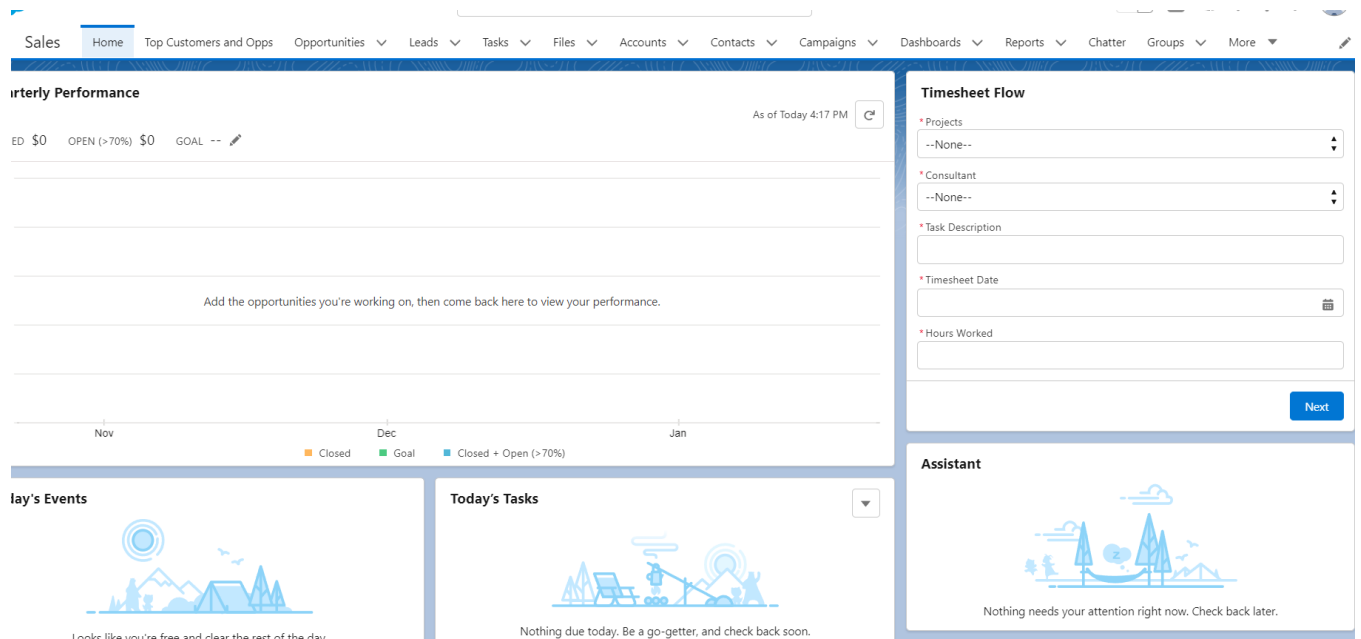


Select Timesheet Flow under Flow in right panel -> Click Save -> Activate > Assign as Org Default -> Save





Go back to your homepage and you should see your Flow



Congrats! You have a fully functioning Project Management App!