



XapDigital Technologies.
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Project Time Tracker App

Installation & User Guide



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OVERVIEW

The Project Time Tracker App is a Salesforce-based application designed to monitor and manage employee working hours across projects. The app enables organizations to track how much time employees spend on each project and categorize those hours as billable or non-billable. It also helps evaluate employee capacity by identifying whether they are working below or above their allocated capacity.

The system captures and organizes time data on a weekly, monthly, and yearly basis, providing structured insights for performance tracking, reporting, and resource planning. The application is integrated with standard Salesforce objects such as Cases and Opportunities, allowing seamless alignment between project work and business operations. Additionally, when linked with Opportunities, the app automatically captures the associated Account information to maintain accurate project-account relationships.

Overall, the Project Time Tracker App improves visibility into workforce utilization, enhances billing accuracy, and supports data-driven project management within the Salesforce ecosystem.



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INSTALLATION STEPS FOR PROJECT TIME TRACKER APP

- Use this URL to install the package into any organization:
 - Production Environment - [Click here for download Project Time Tracker App](#)
 - Sandbox Environment - [Click here for download Project Time Tracker App](#)
- Select one of the installation options as shown below and click on “***Install***” button.



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Install Project Time Tracker App

By www.xapdigital.com

 **Install Project Time Tracker App**

Install for Admins Only

Install for All Users

Install for Specific Profiles...

⚠ You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install **Cancel**

App Name	Publisher	Version Name	Version Number
Project Time Tracker App	www.xapdigital.com	ver 1.0	1.0

Additional Details [View Components](#)



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- Wait till the App finish installing.

 **Install Project Time Tracker App**
By www.xapdigital.com

 **Installing and granting access to all Users...**

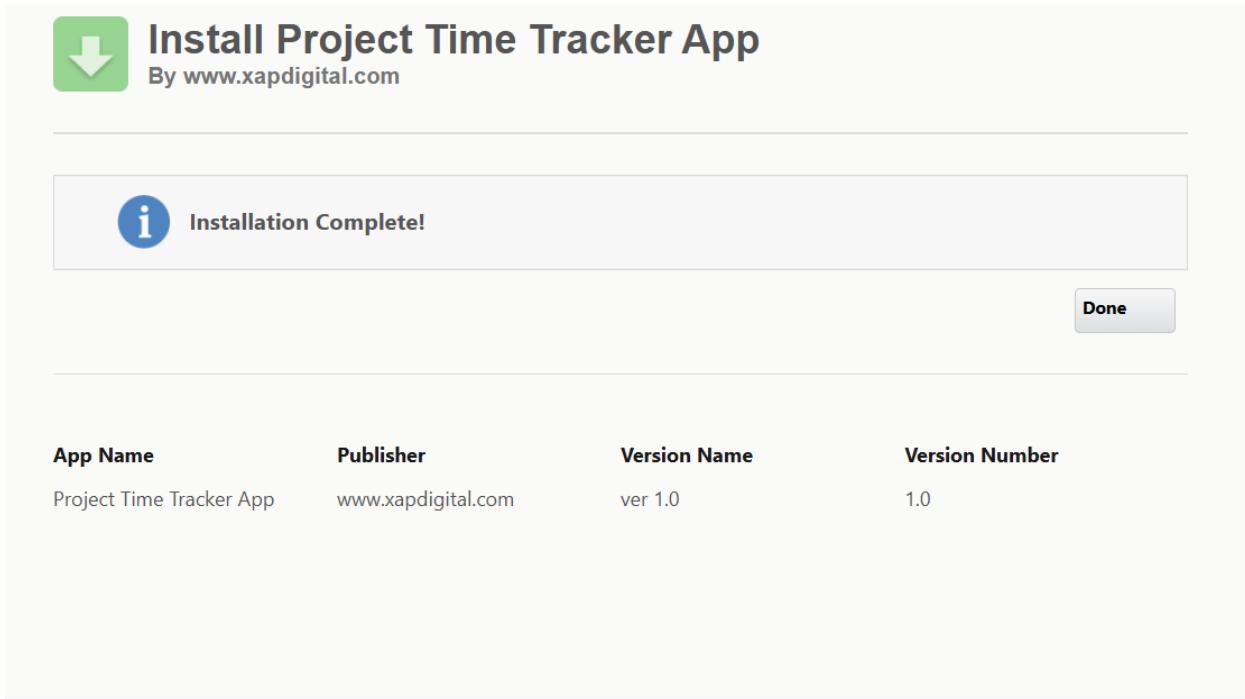
App Name	Publisher	Version Name	Version Number
Project Time Tracker App	www.xapdigital.com	ver 1.0	1.0

Additional Details [View Components](#)



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- Click on '**Done**' button once the installation is complete.



- Perform the post-installation configurations as shown below:

1. Add Project object in related of opportunity.



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The screenshot shows the Salesforce 'Layout Properties' screen with a 'Related Lists' section for 'Projects'. Below it, an opportunity record for 'Xap Digital Opportunity' is displayed. The opportunity details include:

Account Name	Close Date	Amount	Opportunity Owner
Xap Digital	05/02/2026		Xap Digital User

The opportunity is in the 'Prospecting' stage. A related list on the right shows one project:

Project	Account	Budgeted Hours	Default Rate	Total Cost
Sample Text	Sample Text	5,604.8	421.67	204.14

2. Add Capacity field on user layout.



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Save ▾ Quick Save Preview As... ▾ Cancel Undo Redo Layout Properties

Fields Quick Find Field Name

+ Section
+ Blank Space
Capacity

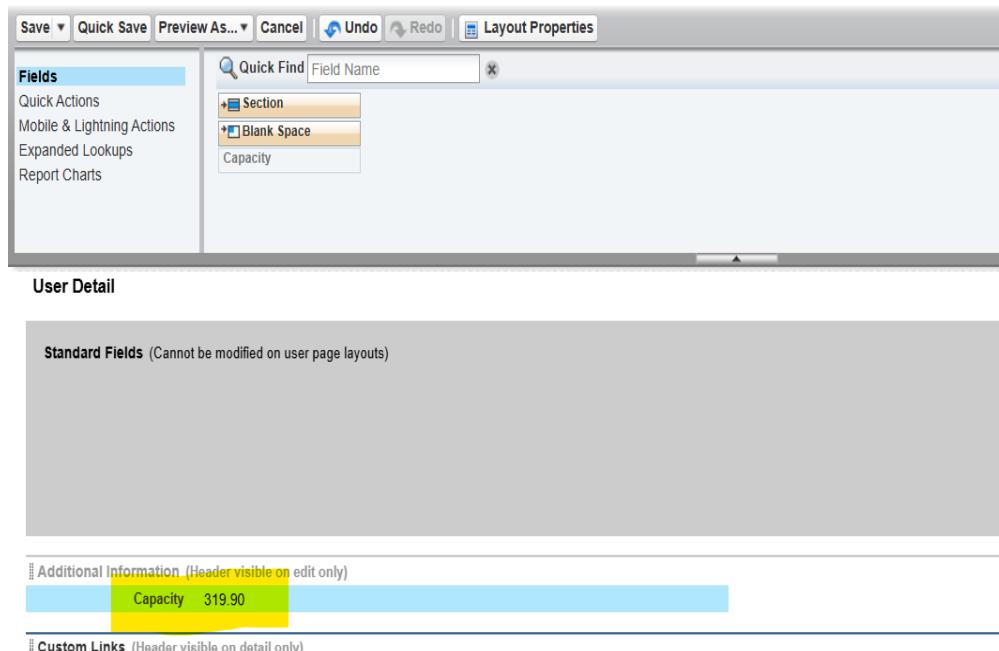
User Detail

Standard Fields (Cannot be modified on user page layouts)

Additional Information (Header visible on edit only)

Capacity 319.90

Custom Links (Header visible on detail only)



GETTING STARTED WITH PROJECT TIME TRACKER APP

- Navigate to the Account Related list on the Account layout and click on the '**New**' button.

Account
Xap Digital

Type Other	Phone	Website	Account Owner  Xap Digital User	Account Site https://www.xapdigital.com/	Industry
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- Related to Account Create opportunity.

Opportunity
Xap Digital Opportunity

Account Name	Close Date	Amount	Opportunity Owner
Xap Digital	05/02/2026		Xap Digital User

Prospecting Qualification Needs Analysis Value Proposition Id. Decision Makers Perception Analysis Proposal/Price Quote

Activity	Details	Chatter
Opportunity Owner	Xap Digital User	Amount
Private		Expected Revenue
Opportunity Name	Xap Digital Opportunity	Close Date
Account Name	Xap Digital	05/02/2026
Type		Next Step
Lead Source		Stage
QBO Id		Prospecting
LastSyncTime		Probability (%)
Order Number		10%
		Primary Campaign Source
		Main Competitor(s)

- On related opportunity create project, and you also create project through project tab. And add manually opportunity and case record.



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Opportunities > Xap Digital Opportunity

Projects

1 item • Updated a few seconds ago

Project ID	Project Name	Account	Budgeted Hours	Default Rate	Total Cost
1 P-000000	XapDigital Test Project	Xap Digital	100.0	10.00	1,000.00

- Created new project record on opportunity.
- Now we created time tracker record from related to project.

Project P-000000

Details Related

Time Tracker (2)

Time Tracker ID	Date	Name of Resource	Hours worked
TT-00000	06/02/2026	Xap Digital User	8.00
TT-00001	05/02/2026	Xap Digital User	8.00

Created two records for time tracker object and now we check reports and final look of project record.



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Details	Related
Project ID	Owner
P-000000	Xap Digital User
Project Name	Account
XapDigital Test Project	Xap Digital
Project Type Category	Opportunity
Billable	Xap Digital Opportunity
Description	Case
Test XapDigital	00001031
Stage	Project Owner
Planning	Xap Digital User
Project Status	Budgeted Hours
Green	100.0
Start date	Default Rate
06/02/2026	10.00
End Date	Total Cost
28/02/2026	1,000.00
Used Hours	Total Chargeable
16.00	8.00
Remaining Hours	Total Non-Chargeable
84.00	8.00
Created By	Last Modified By
Xap Digital User, 06/02/2026, 1:27 pm	Xap Digital User, 06/02/2026, 1:34 pm

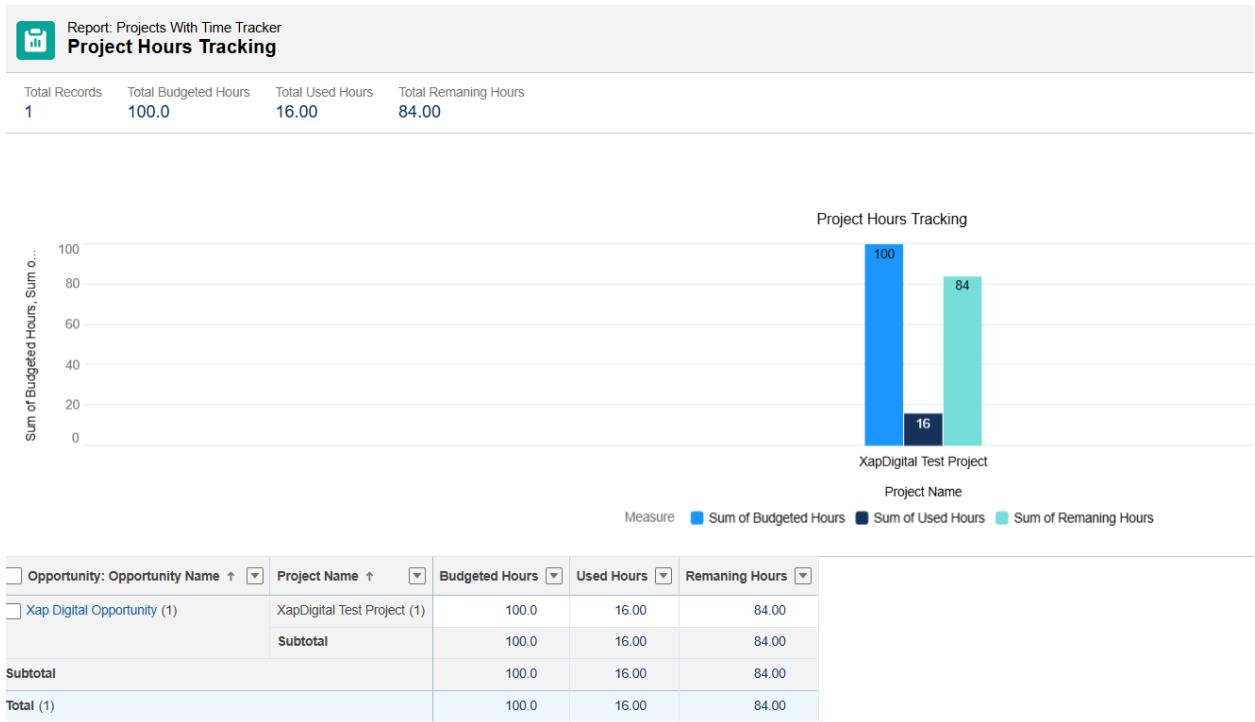
- Now see reports, and also you add capacity fields then add user capacity.

Name	Description	Folder	Created By
Project Hours Tracking		Projects Report Folder	Xap Digital User
Tracking Project Stage		Projects Report Folder	Xap Digital User
User with Work Capacity		Projects Report Folder	Xap Digital User
Hours by Resource		Projects Report Folder	Xap Digital User
Users Hours Work This Week on Projects		Projects Report Folder	Xap Digital User
Users Hours Work This Year on Projects		Projects Report Folder	Xap Digital User
Users Hours Work This Month on Projects		Projects Report Folder	Xap Digital User

- Open all reports and check data here.



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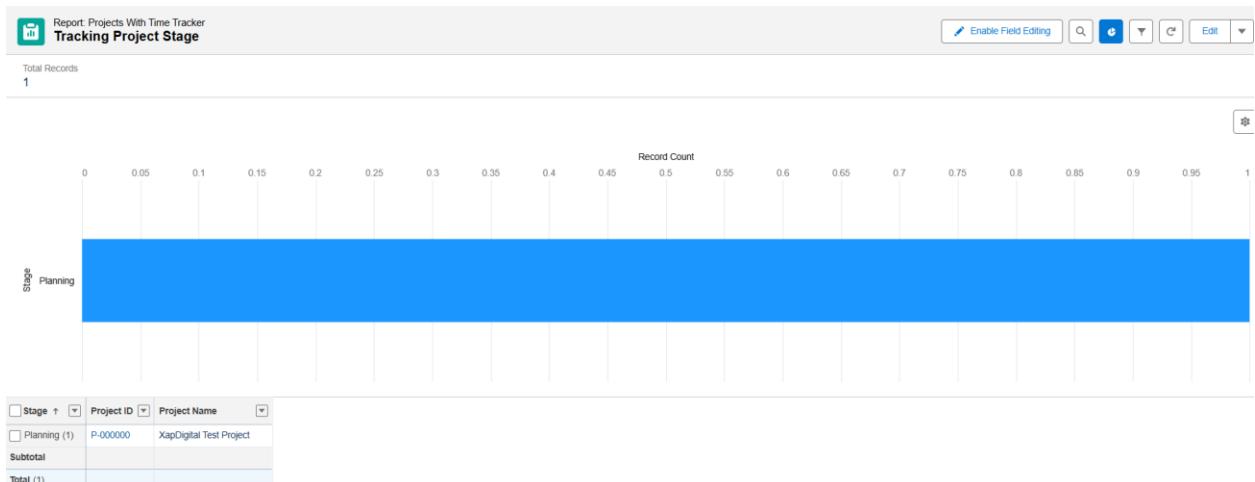




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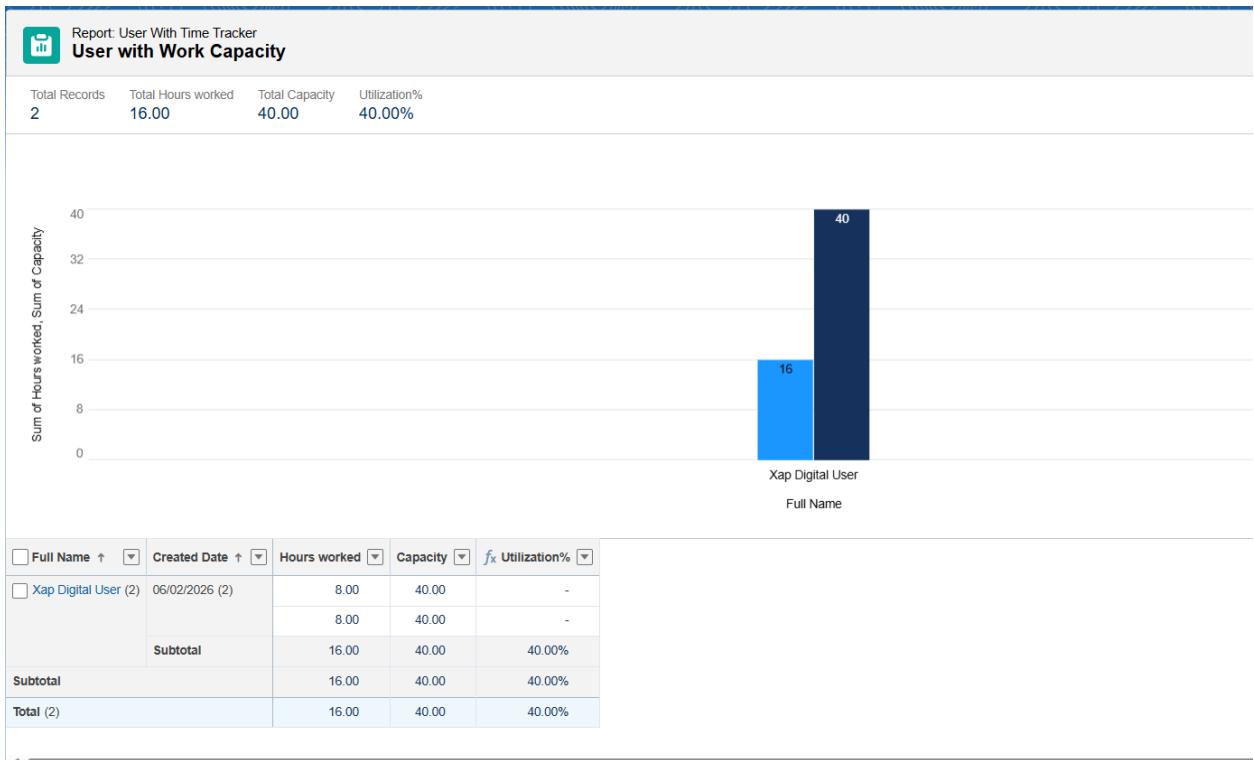
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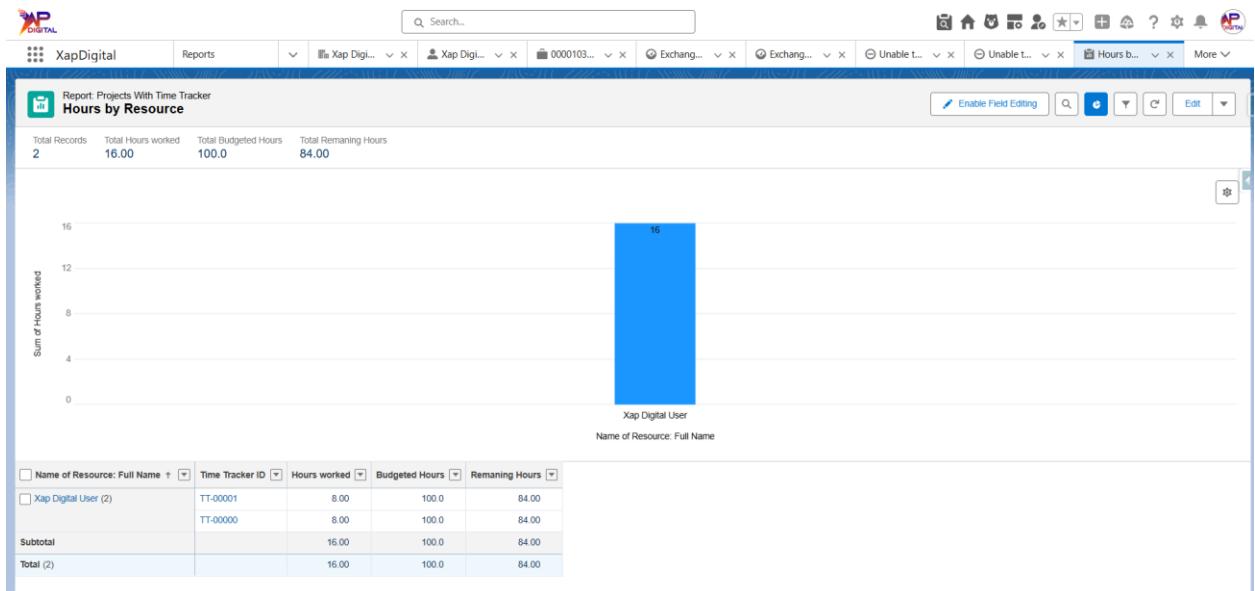




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Note – If you want to add reports on lightning page then you can add this. And set filter according to your requirement.



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Thank You