



XapDigital Technologies.

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[www.xapdigital.com](http://www.xapdigital.com)

# **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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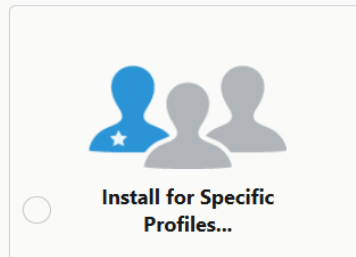
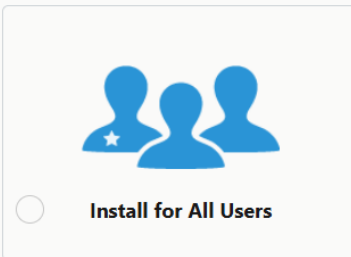
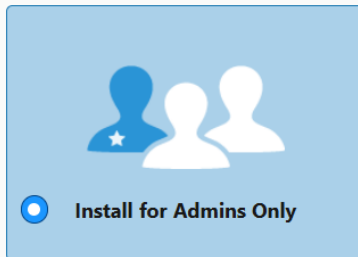
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## Install Project Time Tracker App

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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	<a href="http://www.xapdigital.com">www.xapdigital.com</a>	ver 1.0	1.0

**Additional Details** [View Components](#)



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- Wait till the App finish installing.



## Install Project Time Tracker App

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Installing and granting access to all Users...

App Name	Publisher	Version Name	Version Number
Project Time Tracker App	<a href="http://www.xapdigital.com">www.xapdigital.com</a>	ver 1.0	1.0

**Additional Details** [View Components](#)



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



## Install Project Time Tracker App

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Installation Complete!

Done

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

- Perform the post-installation configurations as shown below:
  1. Add Project object in related of opportunity.



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

Quick Find Related List Name

Activity History	Competitors	Groups	Open Activities	Projects	Voice Calls
Approval History	Contact Roles	Invoices	Orders	Related Content	ZB SalesOrder
Campaign Influence	Content Deliveries	Messaging Sessions	Partners	Service Appointments	
Cases	Files	Notes & Attachments	Products	Stage History	

Related Lists

Projects

Project ID	Project Name	Account	Budgeted Hours	Default Rate	Total Cost
Sample Text	Sample Text	Sample Text	5,804.8	421.57	204.14

XapDigital Accounts Xap Digital Xap Digital 0000103... Exchange... Exchange... Unable to... Unable to... Xap Digital P-0000...

Xap Digital Opportunity

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

Prospecting Qualification Needs Analysis Value Proposition Id Decision Makers Perception Analysis Proposal/Price Quote Negotiation/Review Closed Mark Stage as Complete

Activity Details Chatter

Opportunity Owner: Xap Digital User Amount: Expected Revenue: Opportunity Name: Xap Digital Opportunity Close Date: 05/02/2026 Account Name: Xap Digital Next Step:

Related Projects (1)

P-000000 Project Name: XapDigital Test Project Account: Xap Digital Budgeted Hours: 100.0 View All

## 2. Add Capacity field on user layout.



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

Quick Find Field Name

Fields

- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Report Charts

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	Phone	Website	Account Owner	Account Site	Industry
Other			Xap Digital User	<a href="https://www.xapdigital.com/">https://www.xapdigital.com/</a>	





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- Related to Account Create opportunity.

Opportunity

**Xap Digital Opportunity**

Account Name

Xap Digital

Close Date

05/02/2026

Amount

Opportunity Owner

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	<input type="checkbox"/>	Expected Revenue	
Opportunity Name	Xap Digital Opportunity	Close Date	05/02/2026
Account Name	Xap Digital	Next Step	
Type		Stage	Prospecting
Lead Source		Probability (%)	10%
QBO Id		Primary Campaign Source	
LastSyncTime			
Order Number		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

[New](#) [Change Owner](#)

[Filter](#) [Reset](#) [Sort](#) [Dropdown](#)

<input type="checkbox"/>	Project ID	Project Name	Account	Budgeted Hours	Default Rate	Total Cost	
1	<a href="#">P-000000</a>	XapDigital Test Project	Xap Digital	100.0	10.00	1,000.00	<a href="#">Dropdown</a>

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

Project **P-000000**

[Details](#) [Related](#)

**Time Tracker (2)** [New](#)

Time Tracker ID	Date	Name of Resource	Hours worked	
<a href="#">TT-00000</a>	06/02/2026	<a href="#">Xap Digital User</a>	8.00	<a href="#">Dropdown</a>
<a href="#">TT-00001</a>	05/02/2026	<a href="#">Xap Digital User</a>	8.00	<a href="#">Dropdown</a>

[View All](#)

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

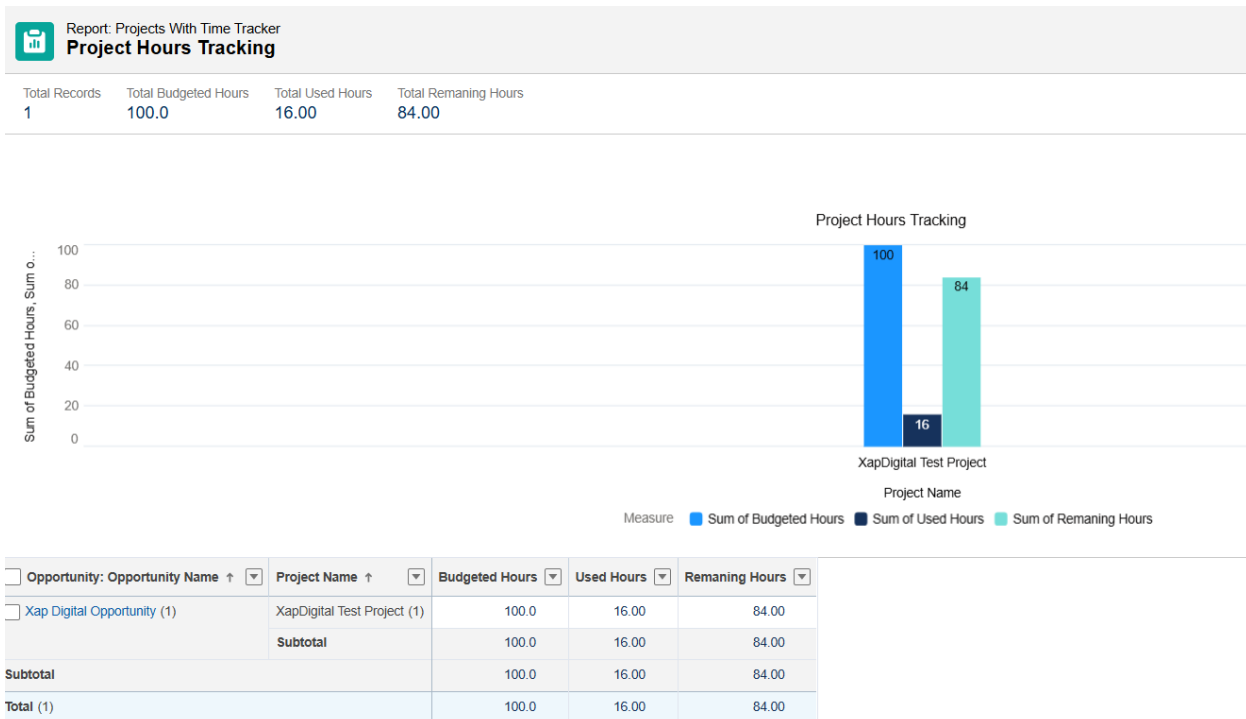
- 
- Now see reports, and also you add capacity fields then add user capacity.

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.

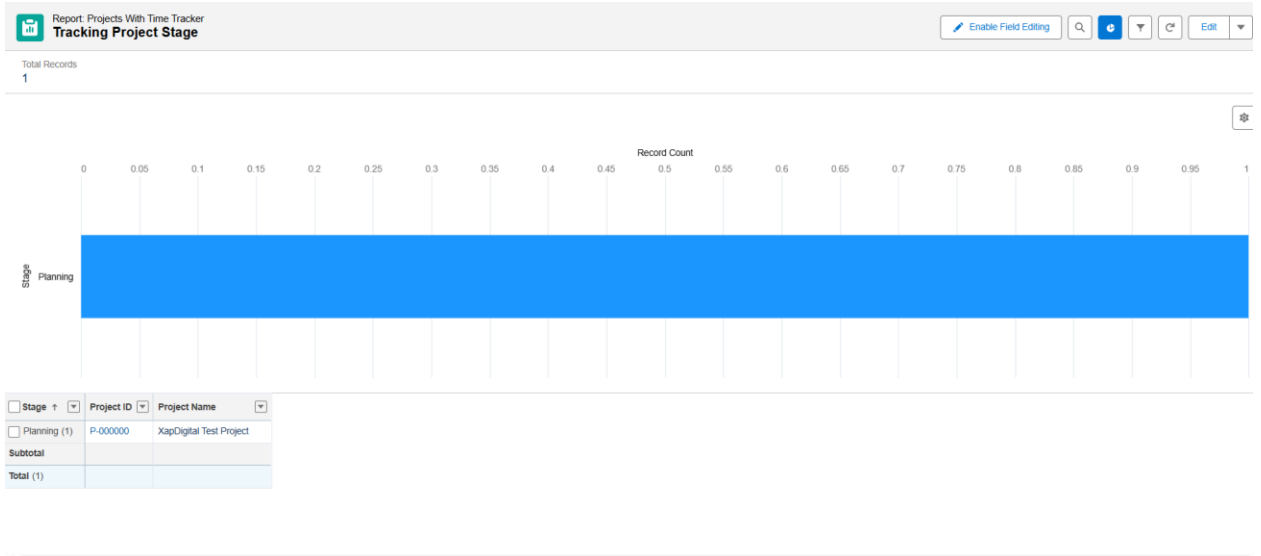


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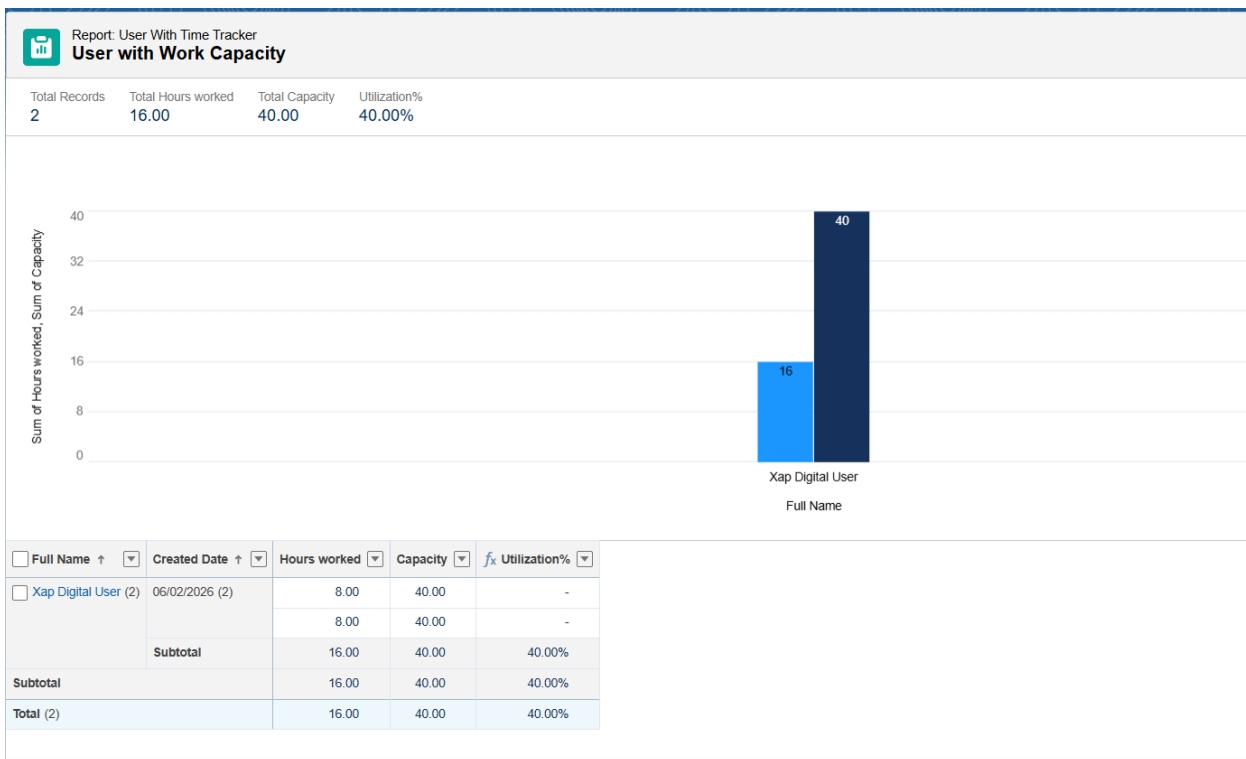


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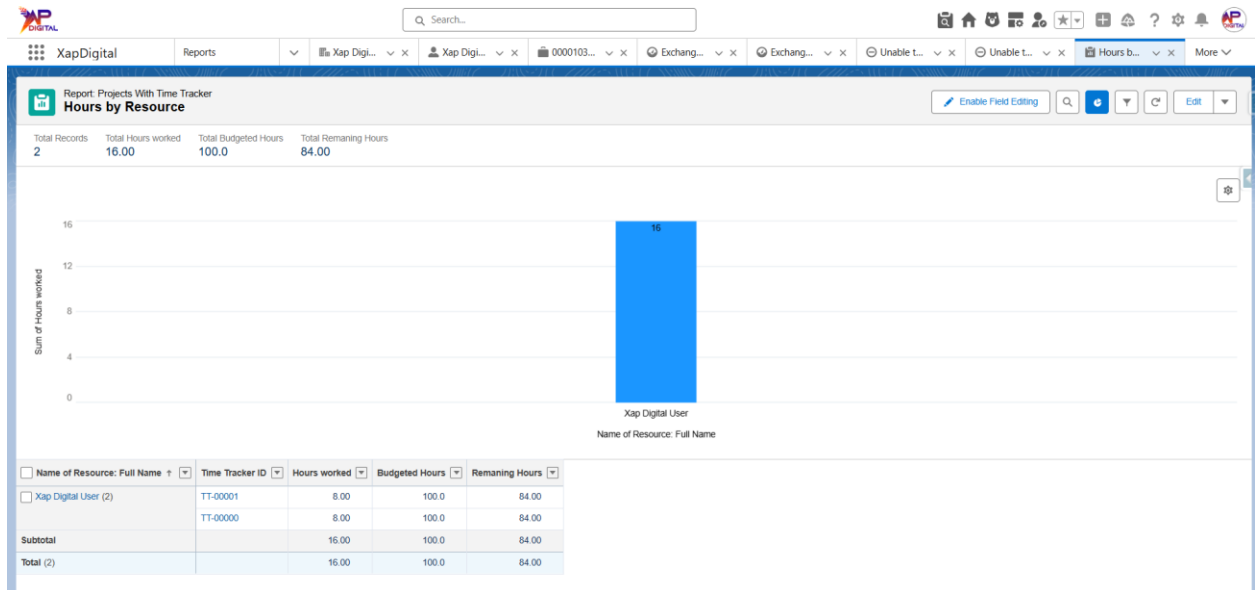


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Note – If you want to add reports on lightning page then you can add this. And set filter according to your requirement.



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# Thank You