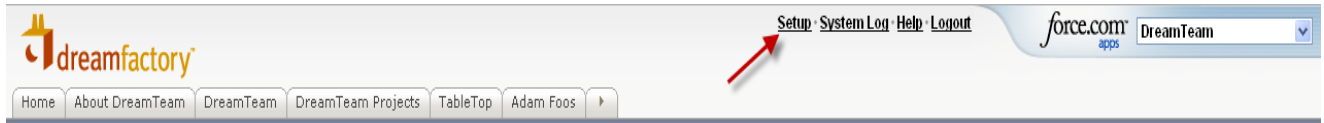


How to link a Timesheet to a Custom Object

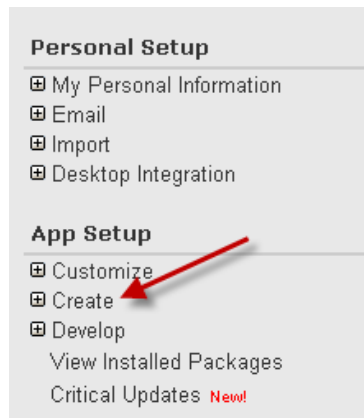
DreamTeam now provides you with the ability to link a User timesheet to a Case, Account, Opportunity and Custom Object directly from the Description tab on the Timesheet Menu on the Calendar. To create this link, please follow the step by step instructions listed below.

Note: You must be a System Administrator to create this link.

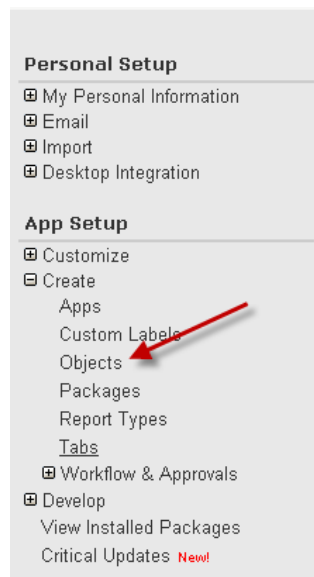
Step 1: Click on the Setup button at the top of the screen



Step 2: Once in Setup mode, click on the Create button on the left hand side of the screen located under the App Setup section.



Step 3: Click on Objects



Step 4: Click on the DreamTeam Time Custom Object

Custom Objects Help for this Page ?

Custom objects are database tables that allow you to store data specific to your organization in Salesforce. You can use custom objects to extend Salesforce functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

New Custom Object				
Action	Label	Master Object	Deployed	Description
Edit Del	Adam Bar		✓	
Edit Del	Adam Foo		✓	
Edit Del	Carousel		✓	
Edit Del	DreamFactory Shared View		✓	
Edit Del	DreamTeam Action Item		✓	
Edit Del	DreamTeam Discussion		✓	
Edit Del	DreamTeam Expense		✓	
Edit Del	DreamTeam Highlight		✓	
Edit Del	DreamTeam Issue		✓	
Edit Del	DreamTeam Linker		✓	
Edit Del	DreamTeam Project		✓	
Edit Del	DreamTeam Resource		✓	
Edit Del	DreamTeam Task		✓	
Edit Del	DreamTeam Time		✓	
Edit Del	Form		✓	
Edit Del	Page		✓	
Edit Del	Slide		✓	
Edit Del	TableTop Document		✓	
Edit Del	TableTop Entity Info		✓	
Edit Del	TableTop Folder		✓	

Step 5: Click on the “New” button in the Custom Field & Relationships Section

Custom Object: DreamTeam Time Help for this Page ?

[Standard Fields \[4\]](#) |
 [Custom Fields & Relationships \[22\]](#) |
 [Validation Rules \[0\]](#) |
 [Standard Buttons and Links \[8\]](#) |
 [Custom Buttons and Links \[0\]](#) |
 [Page Layouts \[1\]](#) |
 [Search Layouts \[4\]](#) |
 [Record Types \[0\]](#) |
 [Apex Sharing Reasons \[0\]](#) |
 [Apex Sharing Recalculation \[0\]](#)

Custom Object Definition Detail [Edit](#) [Delete](#)

Singular Label	DreamTeam Time	Description	
Plural Label	DreamTeam Times	Enable Reports	<input type="checkbox"/>
Object Name	BLND_DFTE_Time	Track Activities	<input type="checkbox"/>
API Name	BLND_DFTE_Time__c	Track Field History	<input type="checkbox"/>
		Deployment Status	Deployed
		Help Settings	Standard Salesforce Help Window
Created By	Adam Buxbaum, 11/25/2008 5:02 AM	Modified By	Adam Buxbaum, 11/25/2008 5:03 AM

Standard Fields [Standard Fields Help ?](#)

Action	Field Label	Data Type
	Created By	Lookup(User)
	Last Modified By	Lookup(User)
	Owner	Lookup(User,Queue)
Edit	Time Name	Text(80)

Custom Fields & Relationships [Custom Fields & Relationships Help ?](#)

Action	Field Label	Data Type	Controlling Field	Modified By
Edit Del	Account Link	Lookup(Account)		Adam Buxbaum, 11/25/2008 5:03 AM
Edit Del	Attachment Link	Text(40)		Adam Buxbaum, 11/25/2008 5:03 AM



Step 6: Select the Lookup Relationship option and click next.

DreamTeam Time
New Custom Field [Help for this Page](#)

Step 1. Choose the field type Step 1

Next Cancel

Specify the type of information that the custom field will contain.

Data Type	
<input checked="" type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Roll-Up Summary 	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
<input type="radio"/> Lookup Relationship 	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
<input type="radio"/> Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: <ul style="list-style-type: none">• The relationship field is required on all detail records.• Once the value of the relationship field has been saved, it cannot be changed.• The ownership and sharing of a detail record are determined by the master record.• When a user deletes the master record, all detail records are deleted.• You can create rollup summary fields on the master record to summarize the detail records. The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Step 7: Select the custom object you want to link the Timesheet to from the Related To drop down menu and then click next.

DreamTeam Time
New Relationship [Help for this Page](#)

Step 2. Choose the related object Step 2

Previous Next Cancel

Select the other object to which this object is related.

Related To: --None--

- None--
- Account
- Adam Bar
- Adam Foo
- Asset
- Business Hours
- Campaign
- Carousel
- Case
- Contact
- Contract
- DreamFactory Shared View

Previous Next Cancel

Step 8: Type in the name of the relationship field in the Field Label box.

DreamTeam Time
New Relationship [Help for this Page](#) ?

Step 3. Enter the label and name for lookup field Step 3 of 6

Field Label [i](#)

Field Name

Description

Help Text [i](#)

Step 9: Enter BLND_custom_link in the Field Name box and then click next.

DreamTeam Time
New Relationship [Help for this Page](#) ?

Step 3. Enter the label and name for lookup field Step 3 of 6

Field Label [i](#)

Field Name [i](#)

Description

Help Text [i](#)

Step 10: Select which Profiles you want to give visibility access to this lookup relationship and then click next.

DreamTeam Time
New Relationship Help for this Page ?

Step 4. Establish field-level security for reference field Step 4 of 6


Previous Next Cancel

Field Label Adam Timesheet Link
Data Type Lookup
Field Name BLND_custom_link
Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input checked="" type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Test Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel



Step 11: Click the next button.

DreamTeam Time
New Relationship Help for this Page ?

Step 5. Add reference field to Page Layouts Step 5 of 6

Previous Next Cancel

Field Label Adam Timesheet Link
Data Type Lookup
Field Name BLND_custom_link
Description


Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field **Page Layout Name**

<input checked="" type="checkbox"/> DreamTeam Time Layout

Previous Next Cancel



Step 12: Click the Save button and you are done.

DreamTeam Time
New Relationship Help for this Page ?

Step 6. Add custom related lists Step 6 of 6

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Field Label Adam Timesheet Link
Data Type Lookup
Field Name BLND_custom_link
Description

Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Adam Bar Layout
<input checked="" type="checkbox"/>	Append related list to users' existing personal customizations

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Once you have created this custom object, you can now link your timesheets to your Custom Object by clicking on the magnified glass icon on the Custom link section in the Description section on the Timesheet menu on the Calendar.

The screenshot shows the DreamTeam Project Calendar interface. At the top, there are navigation tabs for Restore Screen, More Apps, Calendar, Timesheets, Expenses, and Support. The main area displays a timesheet grid for the period from March 29, 2009, to April 4, 2009. The grid has columns for days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and a Total column. The data shows time entries for Adam Buxbaum on various tasks, including Software Development Program and Test Project.

Project	Task	Resource	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
Software Development Program	(No Task)	Adam Buxbaum		8:00	8:00					16:00
	(No Task)	Adam Buxbaum		7:00						7:00
	Client gui (JZME)	Adam Buxbaum								0:00
Test Project	(No Task)	Adam Buxbaum		8:00	8:00	8:00	8:00	8:00		40:00
	(No Task)	Adam Buxbaum		8:00	8:00	8:00	8:00	8:00		40:00

Below the grid, there are buttons for Export, Print, New..., Cancel, and Save. At the bottom, there is a description form with tabs for Details, Description, and Notes. The Description tab is active, showing fields for Description, Type (No Task Type), Case (None), Account (None), Opportunity (None), and Adam Bar (None). A red arrow points to the Adam Bar field.