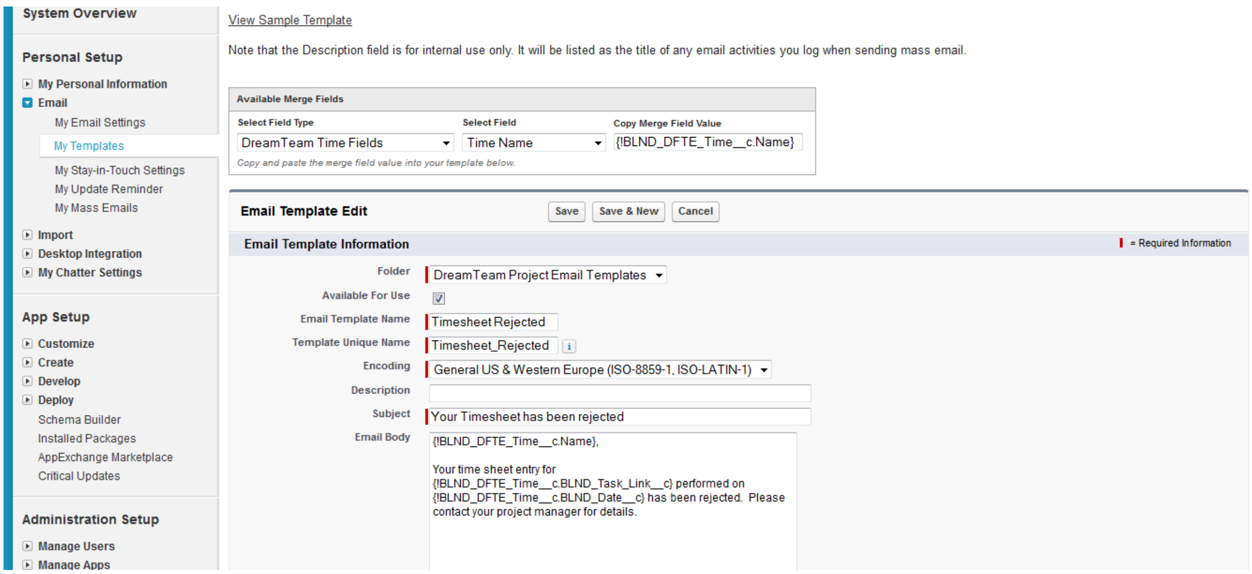
Creating an Automatic Rejected Timesheet Notification

Step 1. Create Email Template

From the Salesforce Setup menu, select “Email” underneath the Personal Setup options at the top. Then click “My Templates,” then click “New Template.”



Save template in the DreamTeam Project Email Templates folder. Name Template as “Timesheet Rejected.”

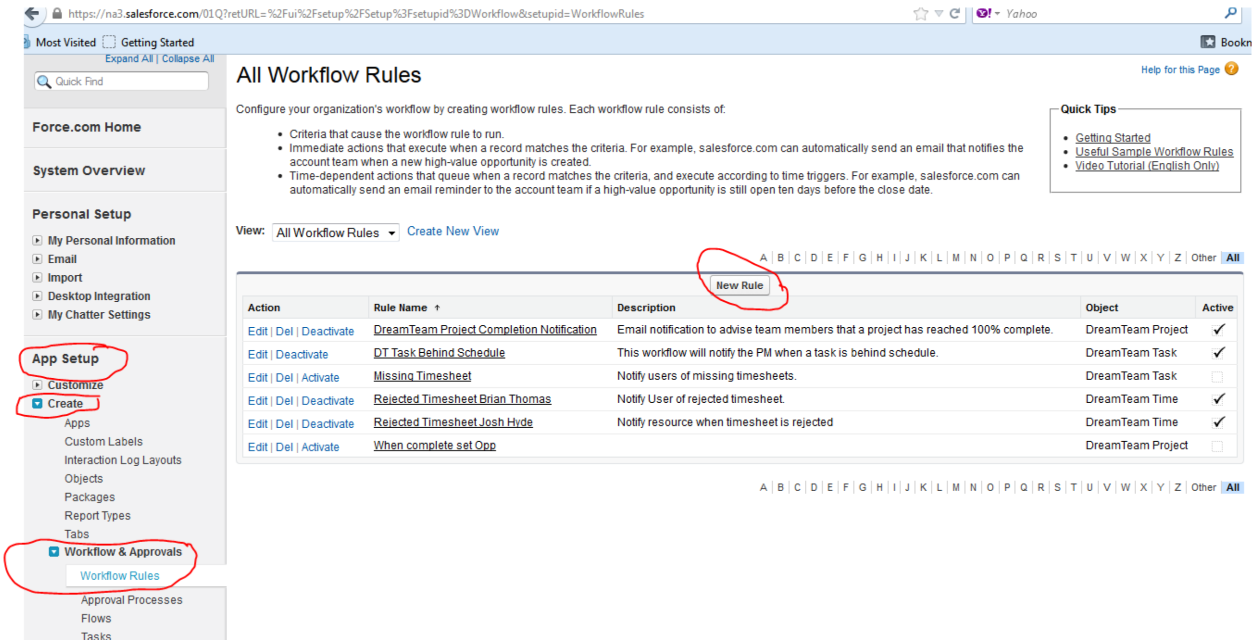
Enter Subject as “Your timesheet has been rejected.”

Select Merge Fields (Time Name, Task Link, Date) and insert into the message as shown above.

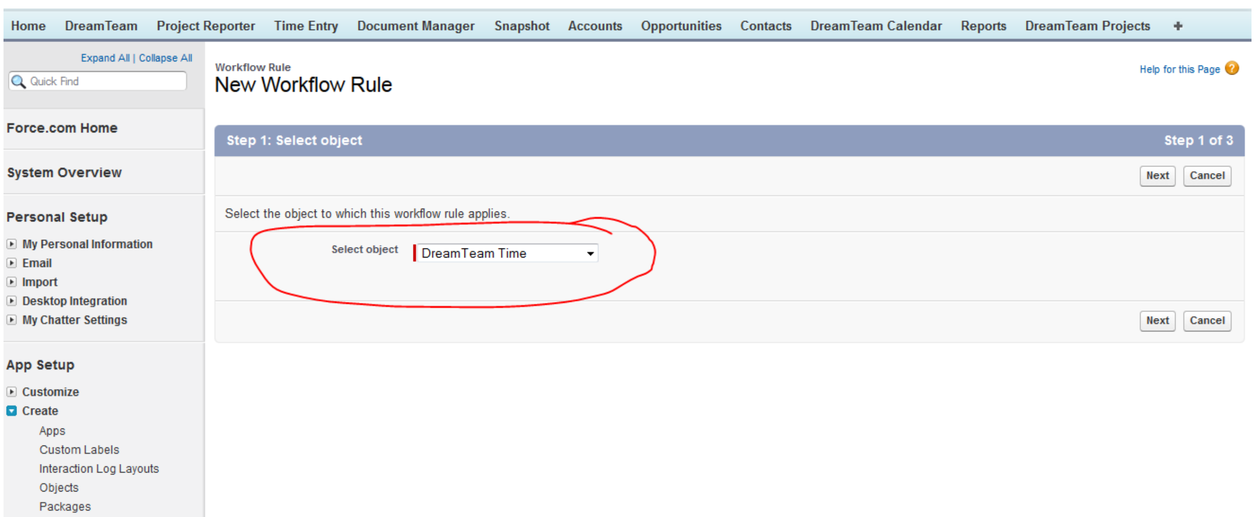
Save Template and make “Available for Use.”

Step 2. Create Workflow Rule

From the Salesforce Setup menu, Select “Create” under App Setup. Select “Workflow & Approvals,” then select “Workflow Rules.” Click on “New Rule.”



Next, Select Object: DreamTeam Time



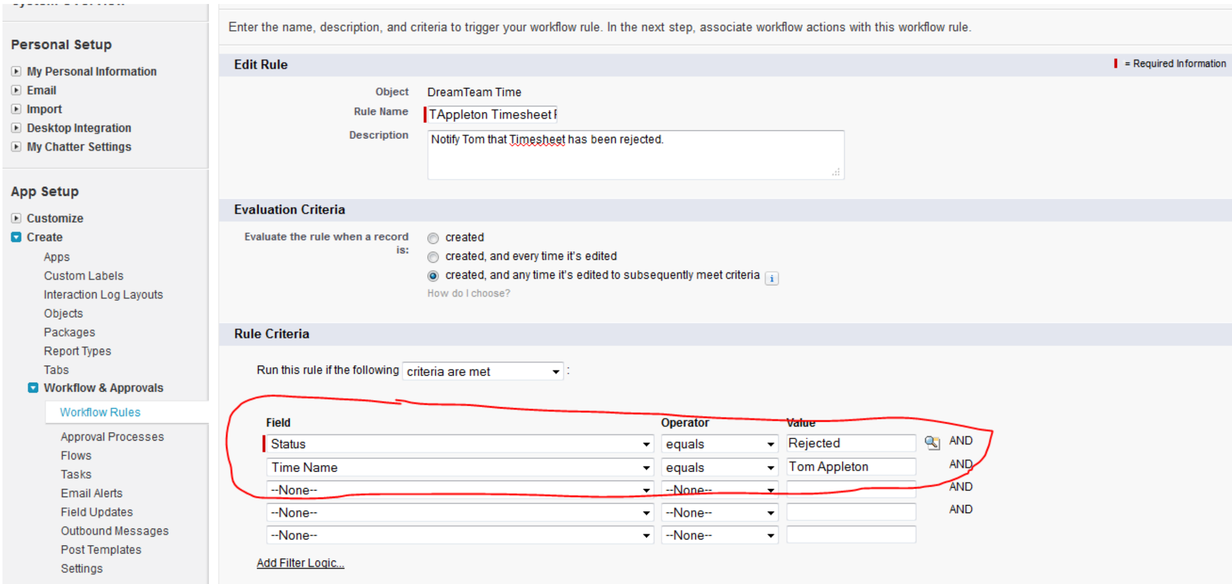
Next, Create Rule Name, and Include User Name as part of the Rule name.

Select Fields under **Rule Criteria**.

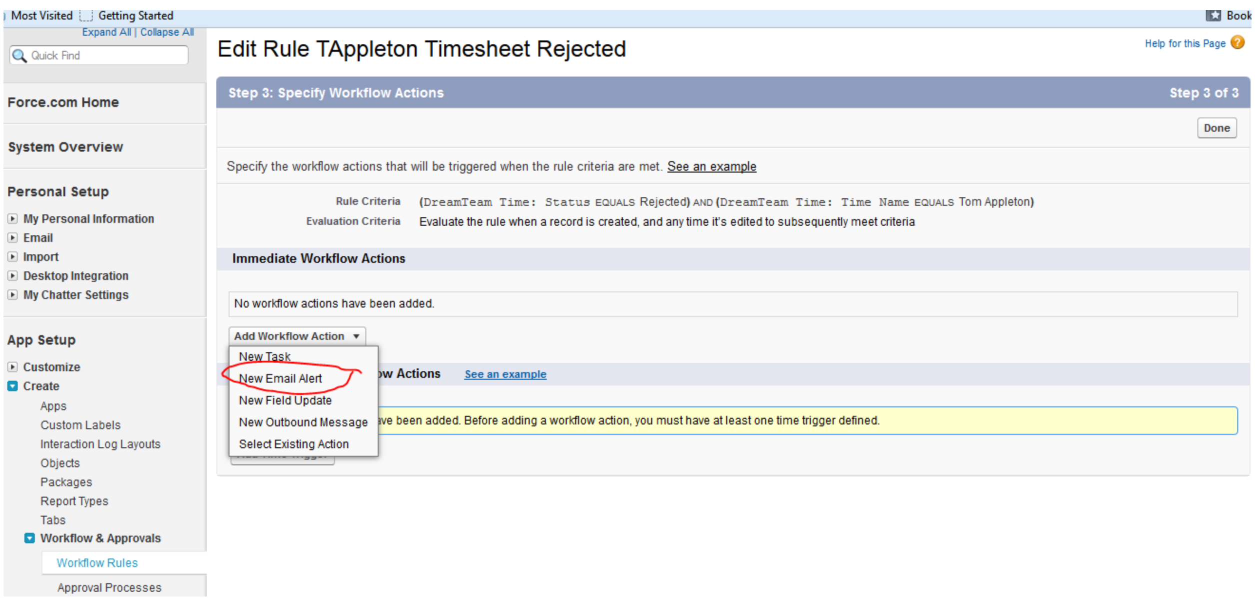
Begin with Field “Status,” “Equals,” “Rejected.”

In the next Row, Select, “Time Name,” “Equals,” “manually typed resource name.”

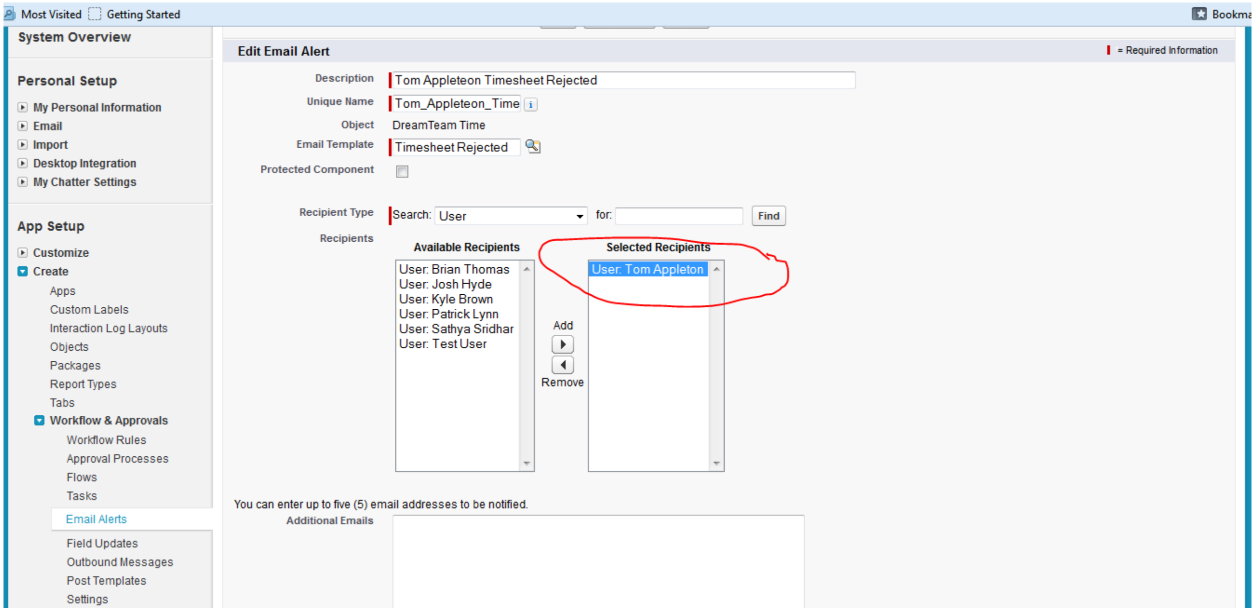
Click “Save & Next.”



Next, Click on “Add Workflow Action,” and select “New Email Alert.”



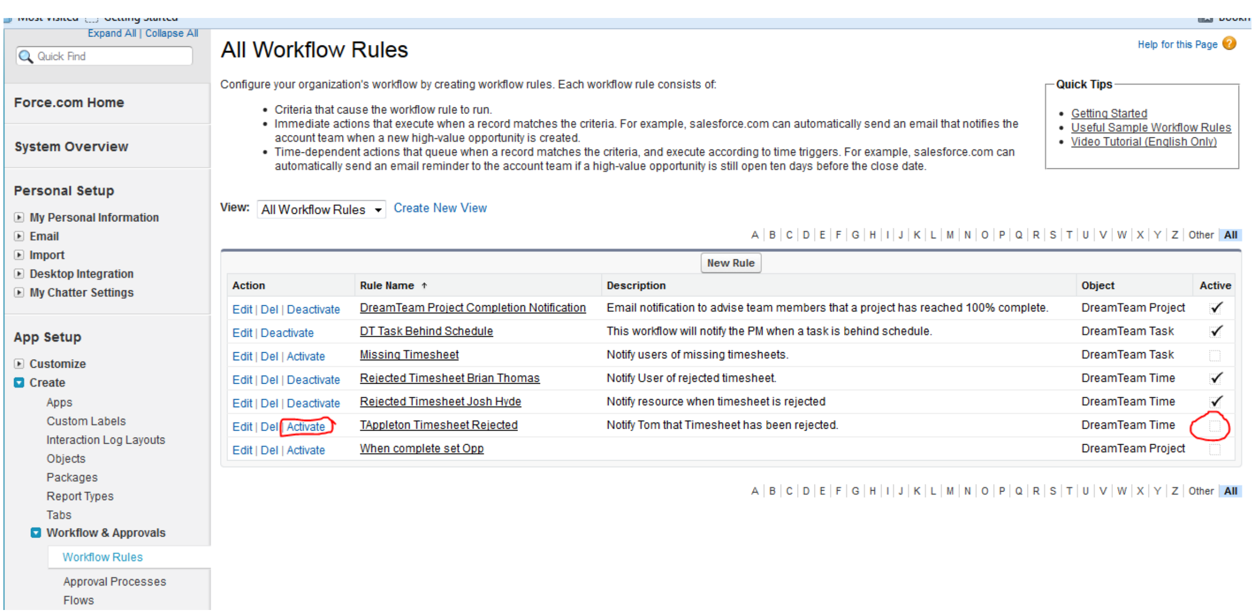
Fill in the required information highlighted in the picture below. Be sure to give a unique name based on the Resource’s name.



Once the Description, and Unique Name have been populated, select the "Timesheet Rejected" template that was created in step one.

Next, select the user that corresponds with the rule that has been established.

Click "Save."



Finally, Return to "Workflow Rules." Identify the new rule created, and click "Activate."

Once the rule is activated, and a timesheet for the corresponding user is rejected in DreamTeam, the user will then receive an email alert as shown below.