

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.”

The screenshot shows the Salesforce Setup interface for creating an email template. On the left is a navigation sidebar with sections: System Overview, Personal Setup (containing My Personal Information, Email, and My Stay-in-Touch Settings), App Setup (containing Customize, Create, Develop, and Deploy), and Administration Setup (containing Manage Users and Manage Apps). The 'Email' option under 'Personal Setup' is selected. The main content area is titled 'Email Template Edit' and includes a 'View Sample Template' link. A note states: 'Note that the Description field is for internal use only. It will be listed as the title of any email activities you log when sending mass email.' Below this is a table for 'Available Merge Fields' with columns for 'Select Field Type', 'Select Field', and 'Copy Merge Field Value'. The table shows 'DreamTeam Time Fields' as the field type, 'Time Name' as the field, and '{BLND_DFTE_Time__c.Name}' as the merge field value. A button 'Copy and paste the merge field value into your template below.' is present. The 'Email Template Information' section contains fields for Folder (DreamTeam Project Email Templates), Available For Use (checked), Email Template Name (Timesheet Rejected), Template Unique Name (Timesheet_Rejected), Encoding (General US & Western Europe (ISO-8859-1, ISO-LATIN-1)), Description (empty), Subject (Your Timesheet has been rejected), and Email Body (containing the merge field and a paragraph: 'Your time sheet entry for (BLND_DFTE_Time__c.BLND_Task_Link__c) performed on (BLND_DFTE_Time__c.BLND_Date__c) has been rejected. Please contact your project manager for details.'). Buttons for 'Save', 'Save & New', and 'Cancel' are at the top right of the form.

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.”

https://na3.salesforce.com/01Q?retURL=%2Fui%2Fsetup%2FSetup%3FSetupId%3DWorkflow&setupId=WorkflowRules

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All Workflow Rules

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, salesforce.com can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, salesforce.com can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

Quick Tips

- Getting Started
- Useful Sample Workflow Rules
- Video Tutorial (English Only)

View: All Workflow Rules Create New View

New Rule

Action	Rule Name	Description	Object	Active
Edit Del Deactivate	DreamTeam Project Completion Notification	Email notification to advise team members that a project has reached 100% complete.	DreamTeam Project	✓
Edit Deactivate	DT Task Behind Schedule	This workflow will notify the PM when a task is behind schedule.	DreamTeam Task	✓
Edit Del Activate	Missing Timesheet	Notify users of missing timesheets.	DreamTeam Task	
Edit Del Deactivate	Rejected Timesheet Brian Thomas	Notify User of rejected timesheet	DreamTeam Time	✓
Edit Del Deactivate	Rejected Timesheet Josh Hyde	Notify resource when timesheet is rejected	DreamTeam Time	✓
Edit Del Activate	When complete set Opp		DreamTeam Project	

Next, Select Object: DreamTeam Time

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New Workflow Rule

Step 1: Select object Step 1 of 3

Select the object to which this workflow rule applies.

Select object DreamTeam Time

Next Cancel

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."

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule I = Required Information

Object: DreamTeam Time
 Rule Name: I TAppleton Timesheet
 Description: Notify Tom that Timesheet has been rejected.

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 1
 How do I choose?

Rule Criteria

Run this rule if the following criteria are met:

Field	Operator	Value	
Status	equals	Rejected	AND
Time Name	equals	Tom Appleton	AND
--None--	--None--		AND
--None--	--None--		AND

[Add Filter Logic...](#)

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

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Edit Rule TAppleton Timesheet Rejected 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: (DreamTeam Time: Status EQUALS Rejected) AND (DreamTeam Time: Time Name EQUALS Tom Appleton)
 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.

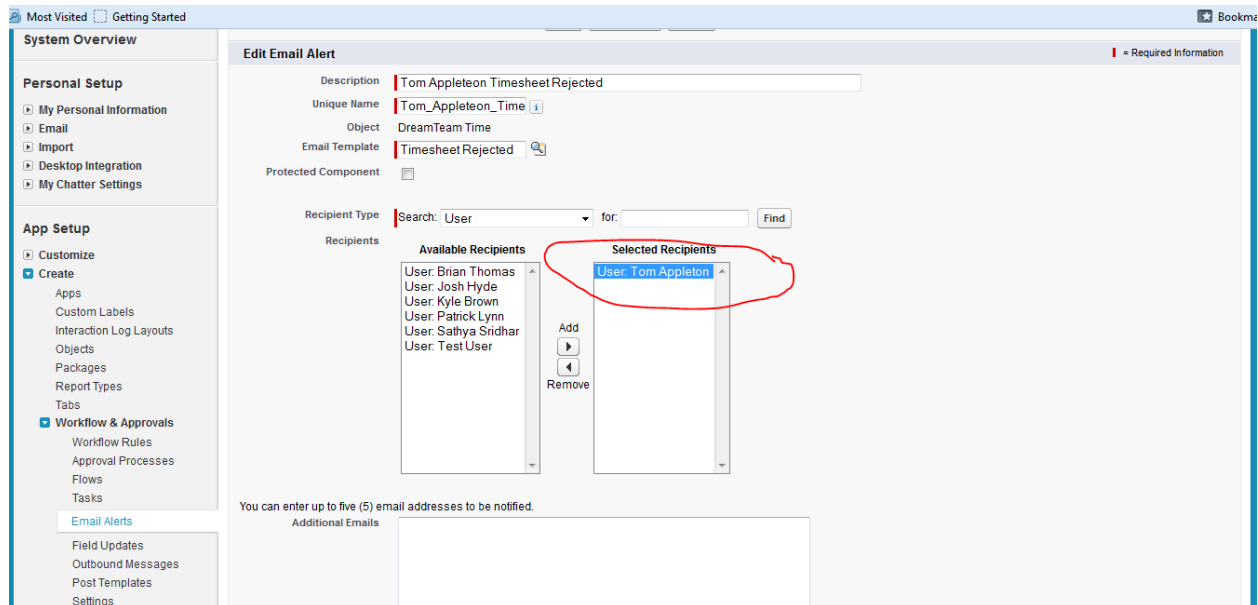
[Add Workflow Action](#)

- New Task
- New Email Alert
- New Field Update
- New Outbound Message
- Select Existing Action

[See an example](#)

Workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

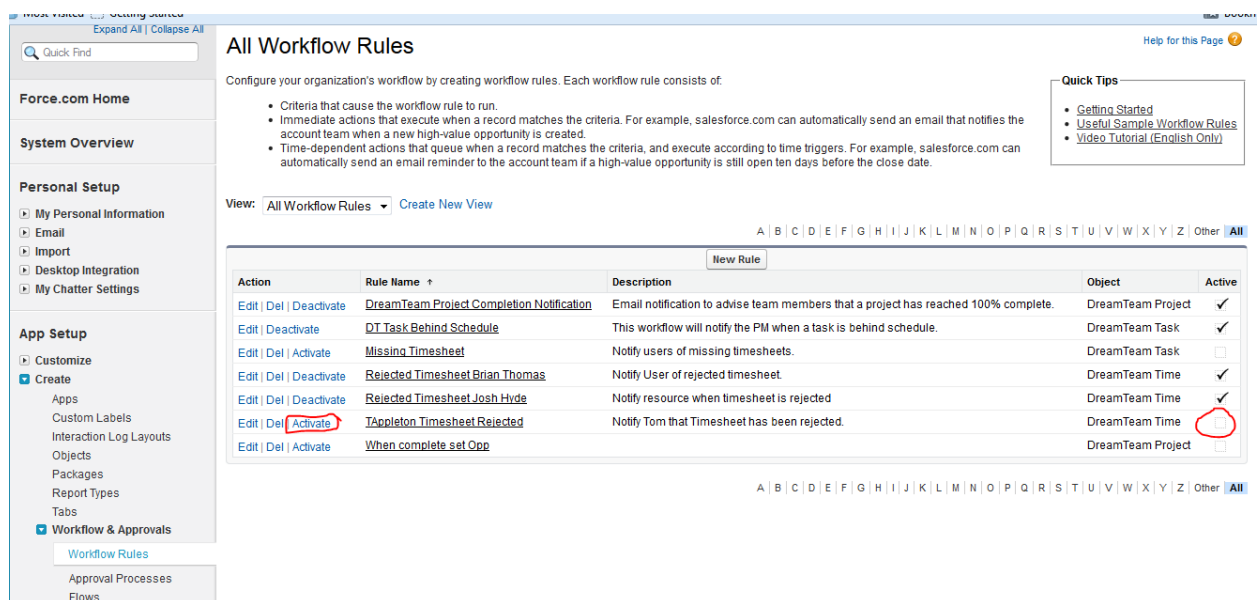
Fill in the required information highlighted in the picture below. Be sure to give a unique name based on the Resource's name.



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.

