Bieasonng
More Together

Clockify Connect for Salesforce

Installation, Setup and Configuration

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www.bieasonng.net

I. Contents

II. Installation

Getting Started

Supported Versions

- Performance, Unlimited, Enterprise: Yes
- Professional, Essential (aka Group): No

III. Setup

Recommendations Prior to Installing Clockify Connect for Salesforce

Below are recommendations for setup prior to Installing Clockify Connect for Salesforce.

Install Clockify Connect

1. Install the most recent Clockify Connect managed package (sandbox org first to test).
2. Enter installation key and select Install for Admins Only, then click Install.

3. Approve the request to grant access to third-party websites for api.clockify.me.
4. Wait for a message telling you that you'll be notified by email when the package is installed and click **Done**.
5. Spend a few minutes doing something fabulous while you're waiting for the email.

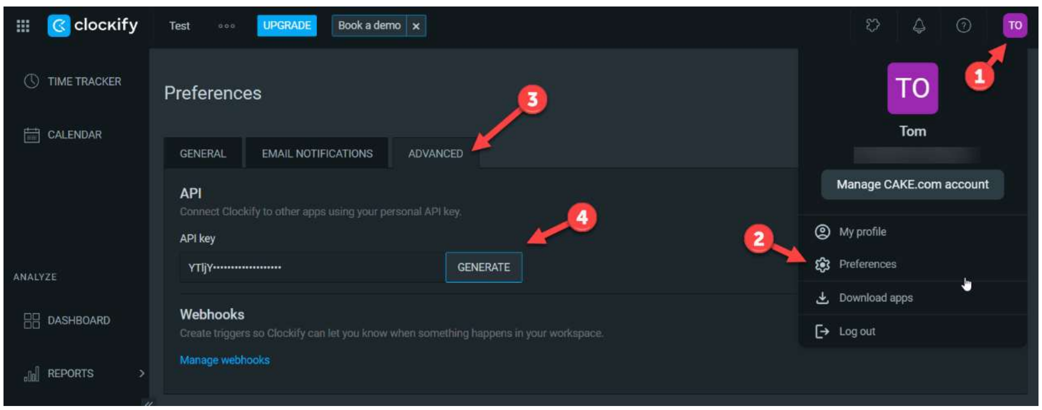
IV. Configuration

Clockify Integration

To connect your Clockify account to Salesforce, you must obtain an API key and Workspace ID from your Clockify account.

Obtain your API key

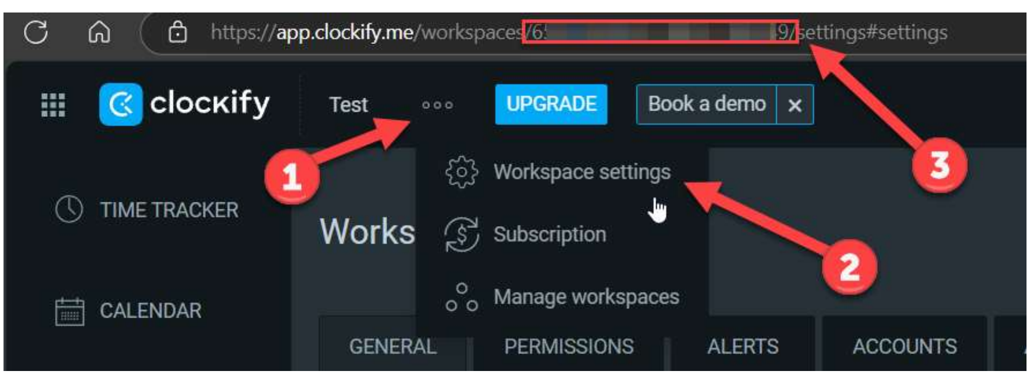
1. Log in to your Clockify account.
2. In the upper right corner, click on your Profile icon > Preferences
3. Click on the ‘Advanced’ tab
4. Click the ‘Generate’ button



*Copy the API key for use later

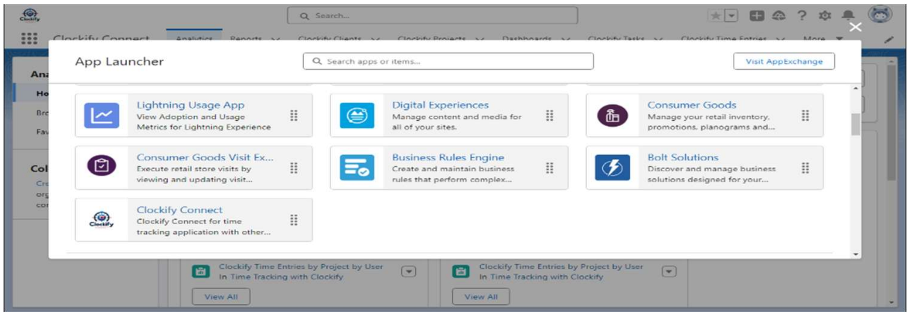
Obtain your Workspace ID

1. Click on the ellipses (three dots) in the top navigation.
2. Click on ‘Workspace settings’
3. Then you can copy your Workspace ID from the URL address bar. It is the id between the workspaces/…. and …/settings#settings
   ***Keep and save** Workspace ID and the API key to add to the Clockify Integration record



Launch Clockify Connect

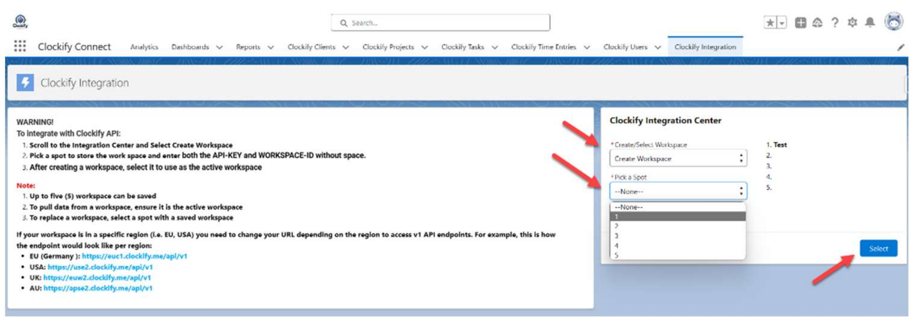
1. Click the app launcher



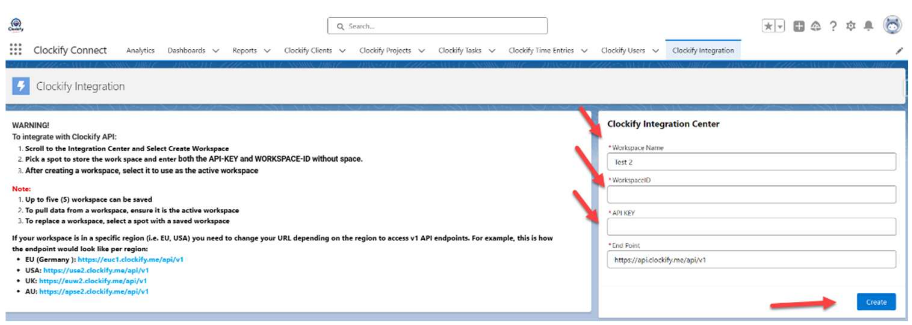
2. Select Clockify Connect app

Add Clockify Workspace

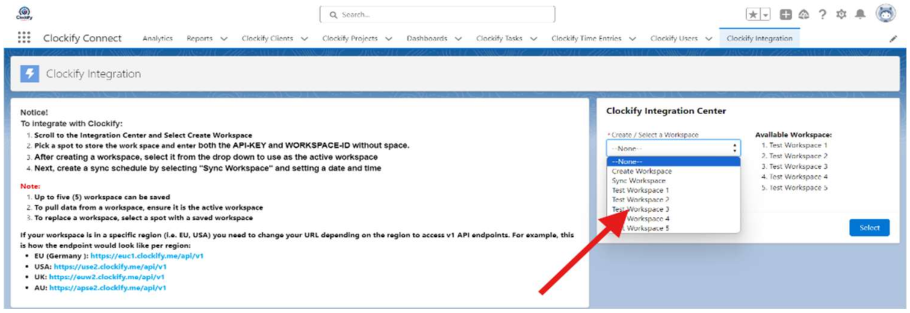
1. Click the Clockify Integration Tab
2. **Scroll to the Integration Center and Select Create Workspace**
3. **Pick a spot to store the workspace and click Select.**



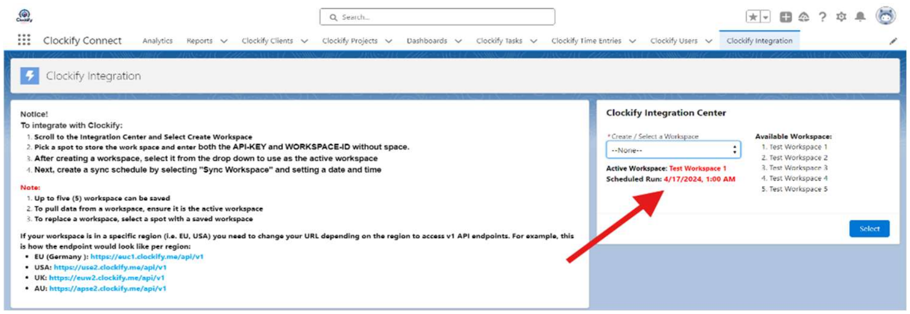
4. **Enter workspace detail (Workspace Label, Endpoint, API Key & Workspace ID)**



5. **After creating a workspace, select it and click Select to use as the active workspace**

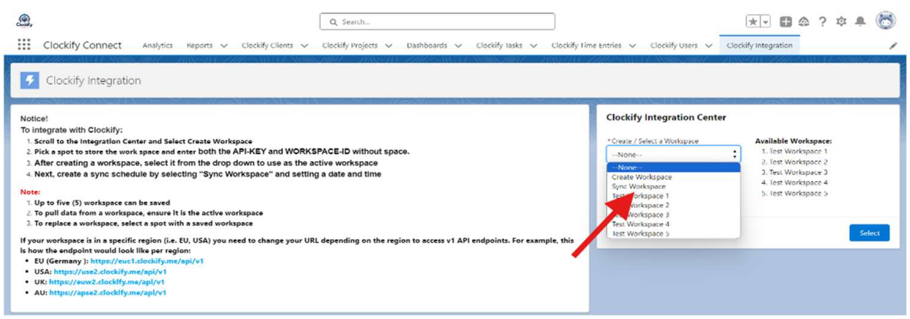


6. Save and ensure the active workspace display as expected.

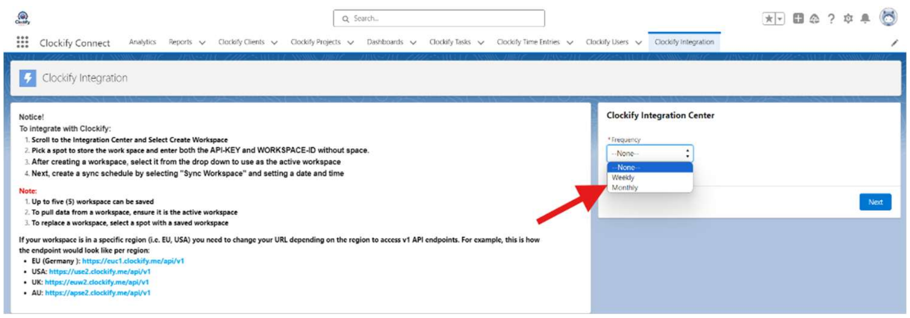


Schedule Workspace Sync

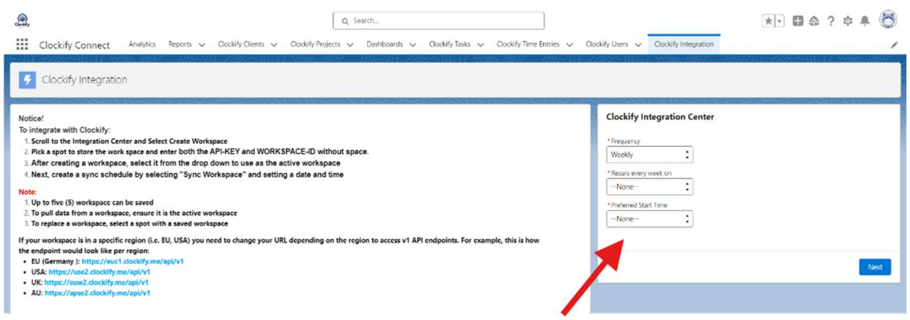
1. Click the Clockify Integration Tab
2. **Scroll to the Integration Center and Select Sync Workspace**



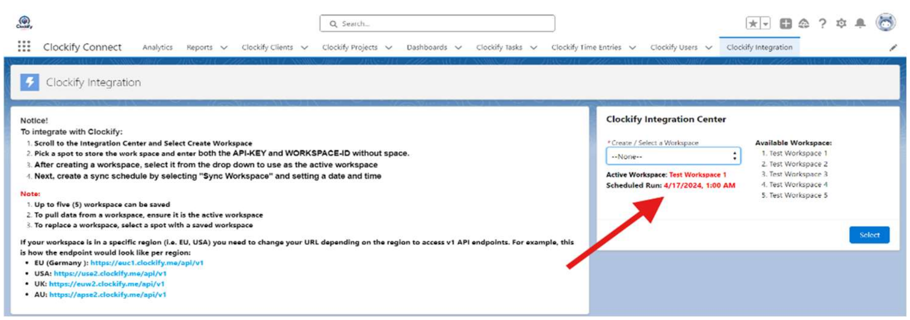
3. Select `Weekly` or `Monthly` for the frequency and set the frequency desired.



4. Select the start and end dates, and a preferred start time.



5. Click Save and ensure the schedule date and time display as expected.



Assign Permission Set to Users

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click the users you want to give full access to Clockify connect.
3. In the Permission Assignments related list, select Edit Assignments.
4. Add “TimeTrackingClockifyApp” Permission Set and save.
5. For users that only need read access, add “TimeTrackingClockifyAppReadOnly” and save.

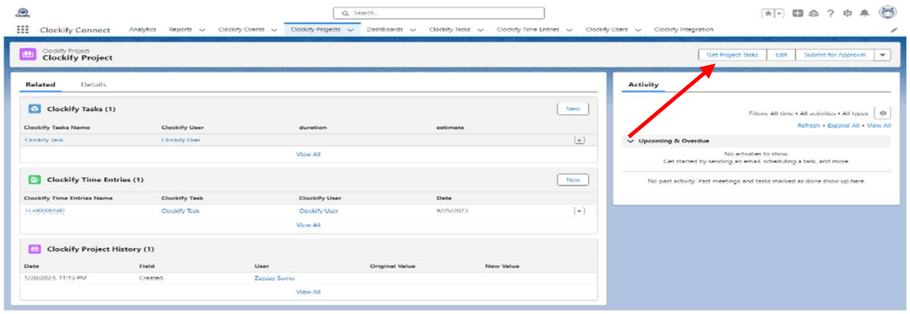
V. USER GUIDE

Pre-condition is that Clockify Connect is installed and the Workspace Sync has executed.

Pull Clockify Project Task

To pull in the Clockify Project Task

1. Click **Clockify Project** Tab
2. Select a Project

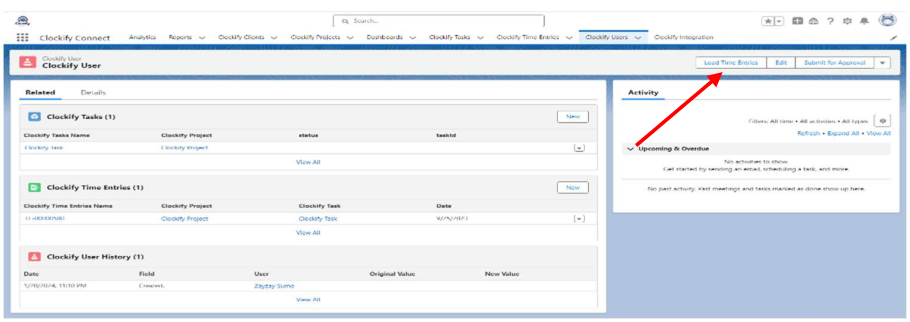


3. Click the Quick Action button **'Get Project Tasks'**.
4. Your process will complete with a message that the process completed.

Pull Clockify User Time Entries

To pull Clockify User Time Entries

1. Click Clockify User Tab
2. Select a User

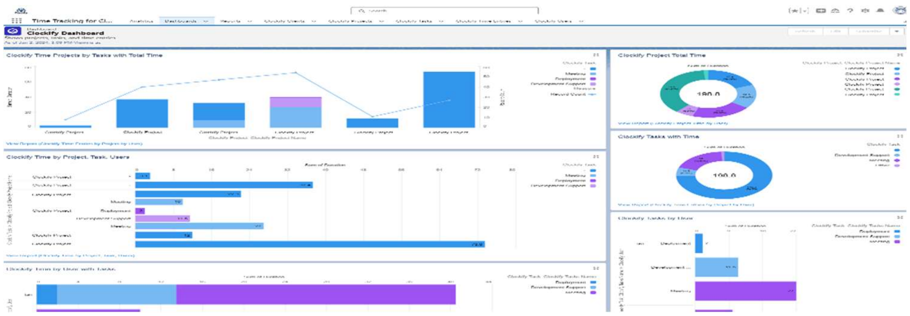


3. Click the Quick Action button **'Load Time Entries'**.
4. Your process will complete with a message that the process completed.

View Clockify Dashboard

To view the Clockify Dashboard

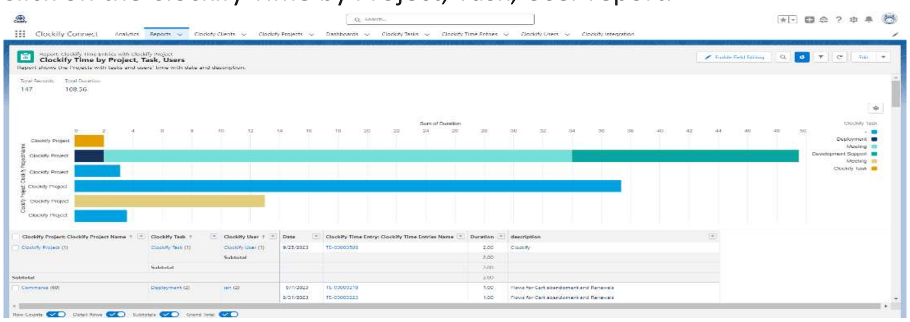
1. Click Reports Tab.
2. Click on the All Folders on the left navigation.
3. Click on the Clockify Dashboards folder.
4. Click on the Clockify Dashboard (you can subscribe to the dashboard for email updates).



View Clockify Time by Project, Task, User Report

To view the Clockify Time by Project, Task, User Report

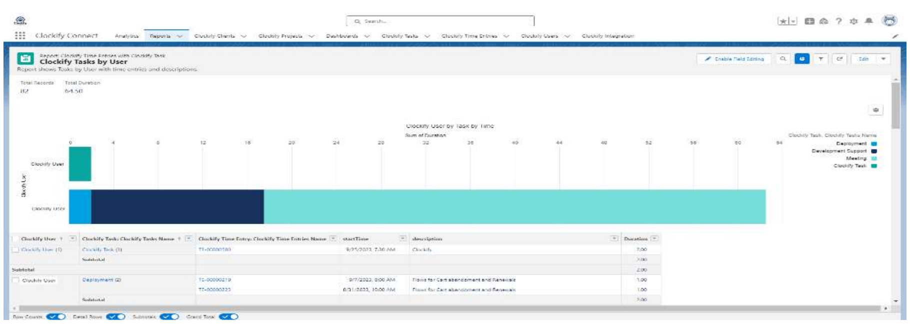
1. Click Reports Tab
2. Click on the All Folders in the left navigation.
3. Click on the Time Tracking with Clockify folder.
4. Click on the Clockify Time by Project, Task, User report.



View Clockify Task by User Report

To view the Clockify Task by User Report

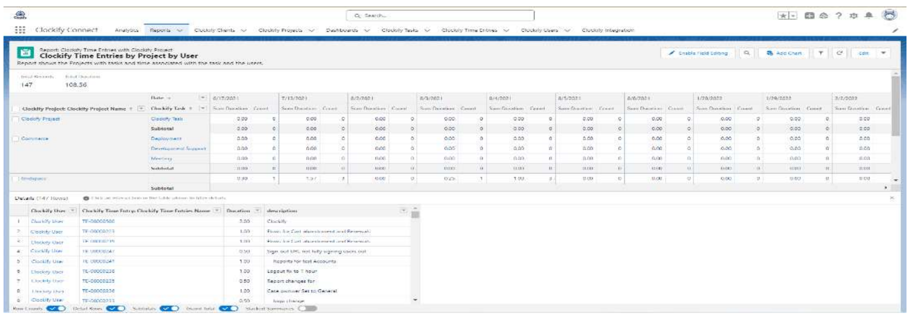
1. Click Reports Tab
2. Click on the All Folders on the left navigation.
3. Click on the Time Tracking with Clockify folder.
4. Click on the Clockify Tasks by User report.



View Clockify Time Entries by Project by User Report

To view the Clockify Time Entries by Project by User Report

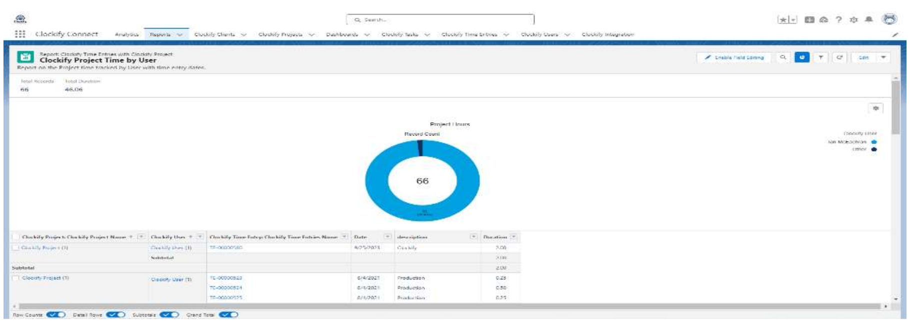
1. Click Reports Tab
2. Click on the All Folders in the left navigation.
3. Click on the Time Tracking with Clockify folder.
4. Click on the Clockify Time Entries by Project by User report.



View Clockify Project Time by User Report

To view the Clockify Project Time by User Report

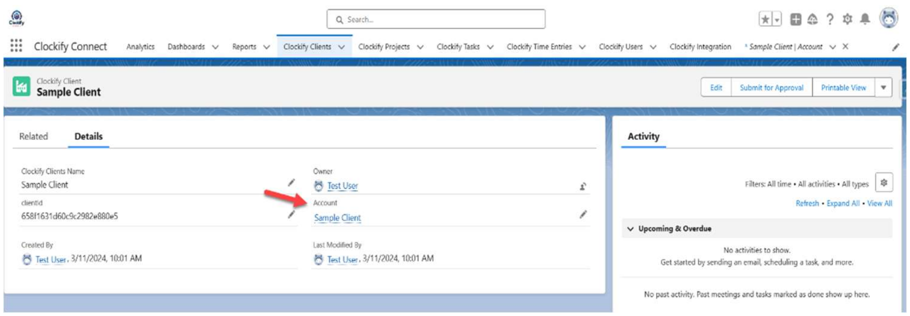
5. Click Reports Tab
6. Click on the All Folders on the left navigation.
7. Click on the Time Tracking with Clockify folder.
8. Click on the Clockify Project Time by User report.



VI. APPENDIX

Link Accounts to Clockify Clients

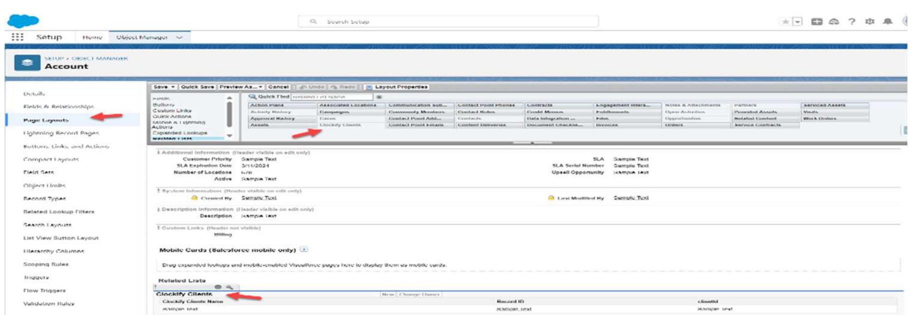
1. To link Accounts to Clockify Clients to see time tracking and more from Clockify Connect. This is useful for when you want to see reports for project work or invoicing related to time tracking that is related to a customer account.
2. Go to the Clockify client record.
3. Edit the record and lookup the Account in the Account field.



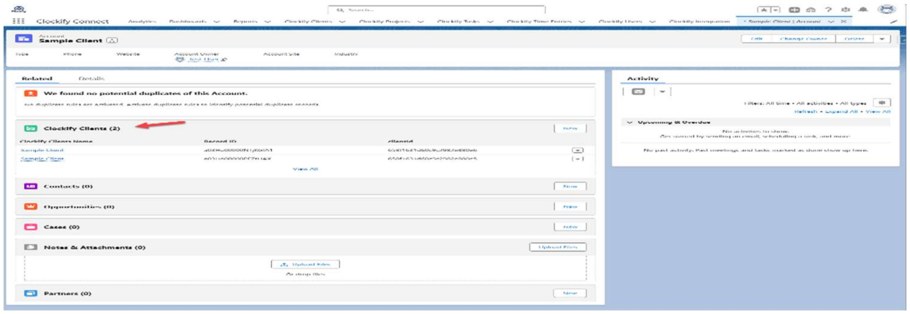
Show related Clockify Clients on Accounts

You can also update the page layout on the Account to show the related Clockify Clients.

1. Go to Setup, click Object Manager, and select Account.
2. Click Page Layouts and Select your page to update.
3. Select the Related Lists and Drag the Clockify Clients to the location as the related list you prefer.



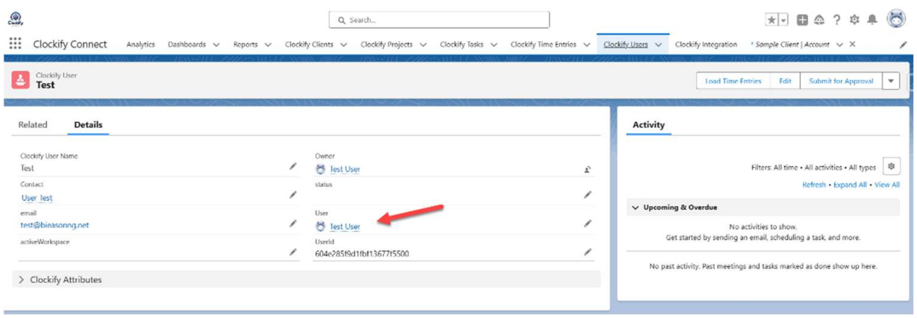
The result is that you can see the Clockify Client records connected to that account for reporting purposes and more.



Similarly, with the Clockify Users you can connect them to the users of Salesforce for time tracking alignment and reporting. You can also connect the Clockify User record to Contacts for time tracking purposes and reporting.

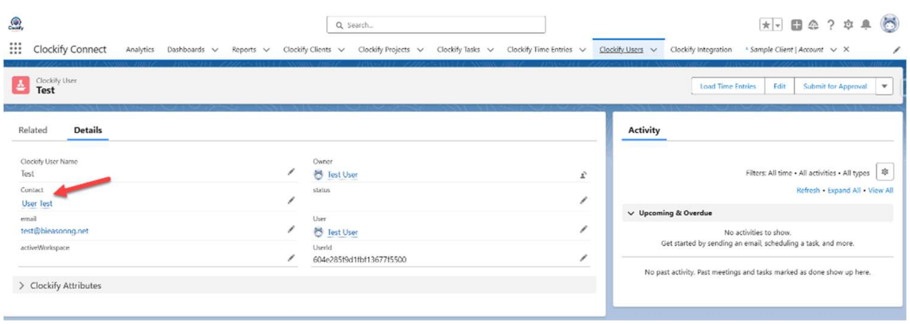
To do this,

1. Go to the Clockify Users and add the user record to it.



You can also link a Clockify User record to a Contact in Salesforce.

1. Click on the Contact field to select the contact in which you can connect the related Clockify records to.



Likewise, as with the Account page layout, you can modify the Contact or User layout to see the time related to the user or the contact.

To do this for the Contact record

1. Go to Setup, Object Manager and click the Contact object.

2. Select Page layouts and Select the Related Lists
3. Drag the Clockify Users to the Related Lists section.
4. Save and see the related Clockify User records to the Contact.