Welcome to TimeCamp Help!

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Salesforce

In this article:

Salesforce is the world's #1 customer relationship management (CRM) platform. Salesforce unites your marketing, sales, commerce, service, and IT teams from anywhere with Customer 360 — one integrated CRM platform that powers our entire suite of connected apps.

Overview

The integration will be enabled for the entire account, so **all users will be able to track time on imported tasks**. The integration will be connected to the Salesforce account of the person who enabled the integration.

Opportunities and Cases will be imported as tasks under the Salesforce project. All lists with items will be imported as subtasks under the tasks (opportunities/cases) they belong to in TimeCamp.

We provide an option to **select types of items that should or should not be imported from Salesforce to TimeCamp**. After the integration is enabled and you selected the target type of items all lists and tasks the owner of integration has access to, will be imported to the Projects module in TimeCamp.

> It is not possible to edit the structure of imported items in TimeCamp.

After the integration is created and the Salesforce items are imported, **all users will be automatically assigned to the Salesforce project and tasks as Regular users**. You can manually change their roles in this project and unassign selected users from the entire project or add them only to certain tasks. If users are assigned to the main project Salesforce they will be able to track time to all tasks under the Salesforce project structure. If users are assigned only to certain tasks, they will be able to track time only to these tasks and subtasks under the tasks' structure.

> Items marked as completed or deleted in Salesforce will be automatically moved to the list of Archived tasks in TimeCamp. Please note that only **Opportunities** with the status **Closed Won** and **Closed Lost** will be moved to the archived list in TimeCamp. All other types of Closed Opportunities will remain as active in TimeCamp.

If you create a new item in Salesforce it will be automatically imported to TimeCamp within 1 hour. To immediately synchronize the integration and update newly added items use the “Force synchronization” option on TimeCamp web Timesheet. Synch will be executed within a few seconds.



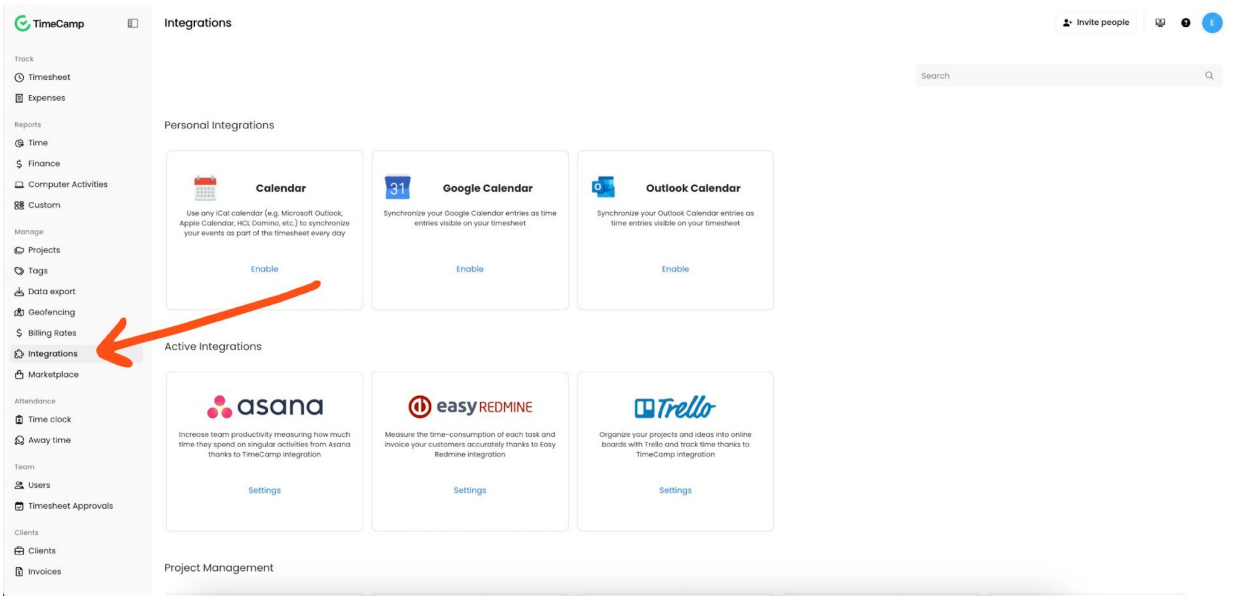
> If user who enabled the integration is not a part of your account anymore, we recommend reenabling the integration.

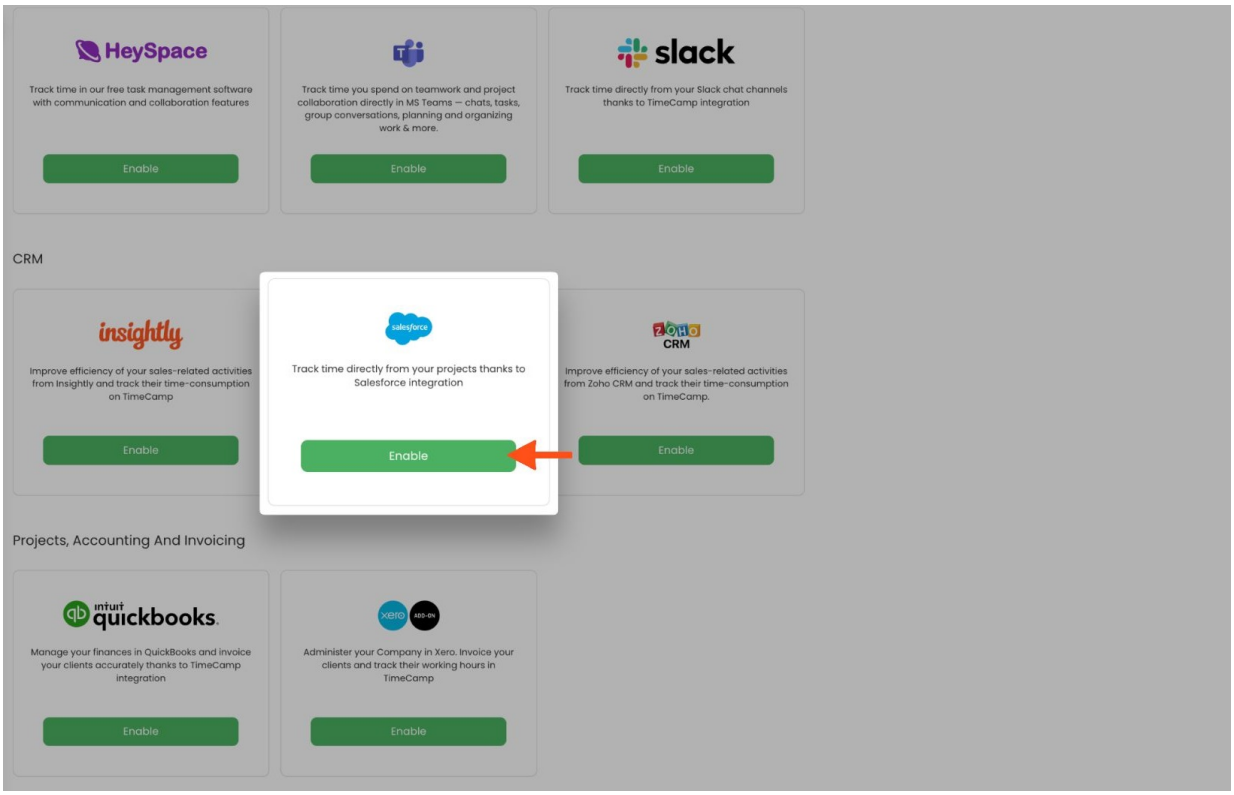
Enable integration

> Only the Administrator of the account can enable the integration.

Step 1

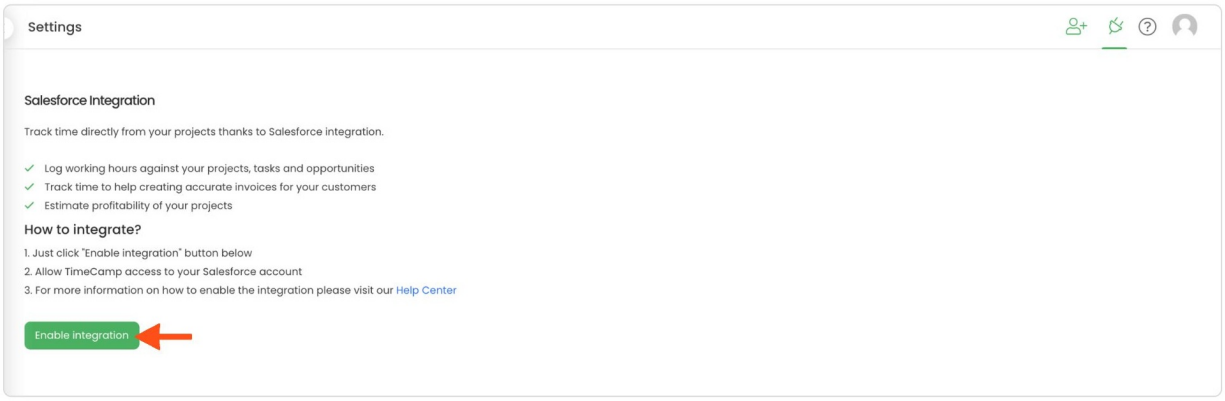
To enable the Salesforce integration, select the **Integrations** option in the left panel. Next, find the **Salesforce** integration on the list and click the **Enable** button.





Step 2

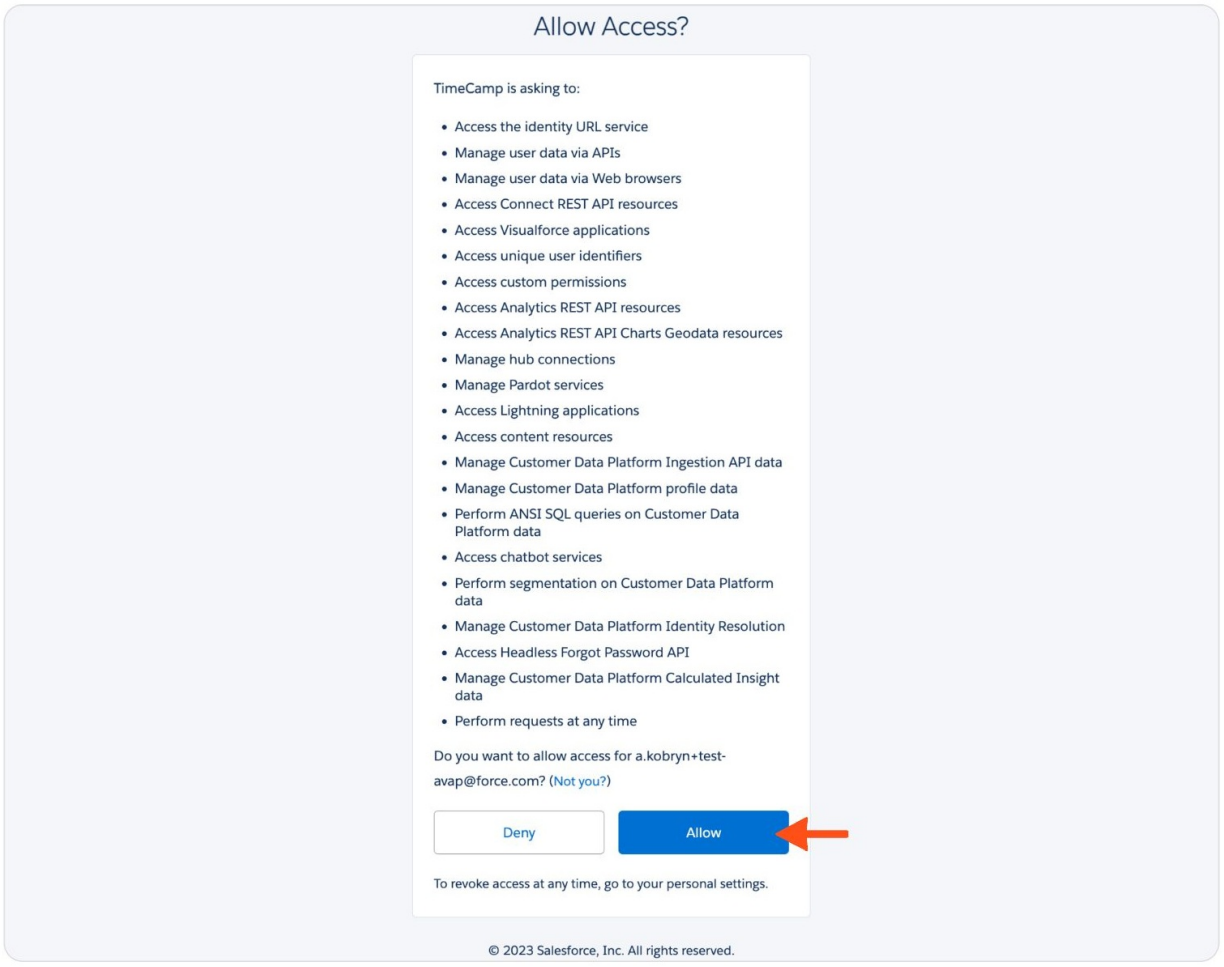
Next, click on the green **Enable integration** button.



Please make sure that API access is enabled on your Salesforce account by user profile. Otherwise, it won't be possible to integrate TimeCamp and Salesforce.

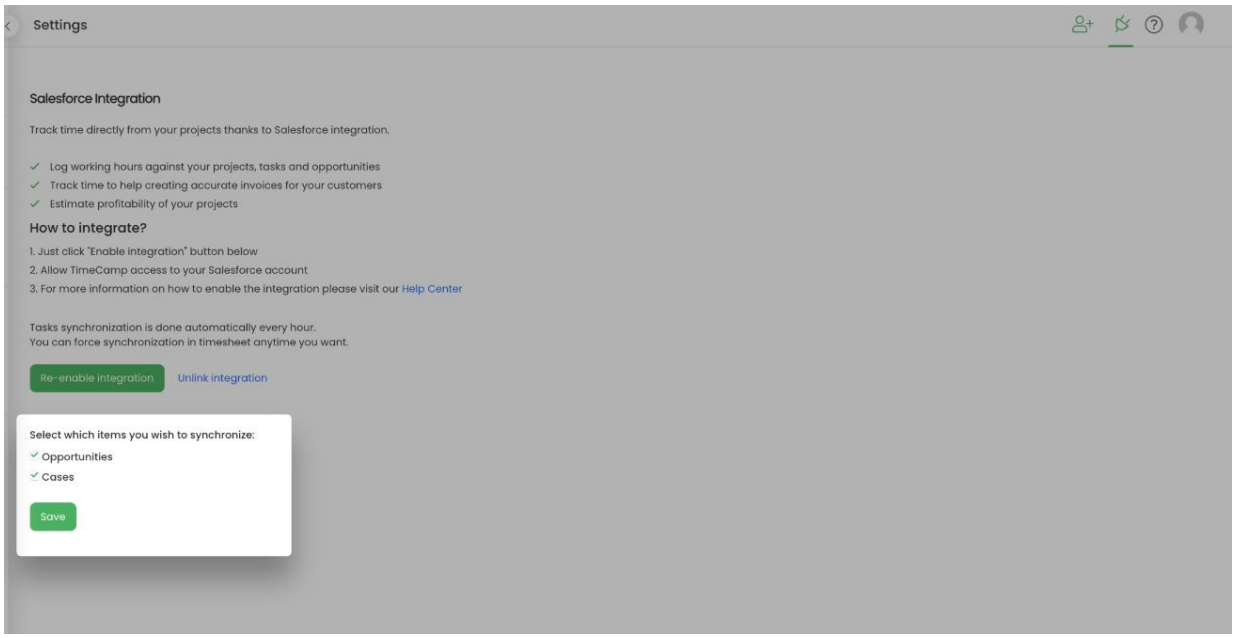
Step 3

You'll be redirected to the Salesforce website and asked to authorize TimeCamp access to your account. Proceed with authorization by clicking on the blue **Allow** button.



Step 4

Now you can **select items** that should be synchronized to TimeCamp. Import them all or mark specific ones with checkboxes and save your changes.



Your lists of Opportunities and Cases will be imported to the Projects module in TimeCamp. All imported items will be accessible for you to track time using TimeCamp's timesheets, mobile, desktop application, or browser plugin.

Track time on imported items

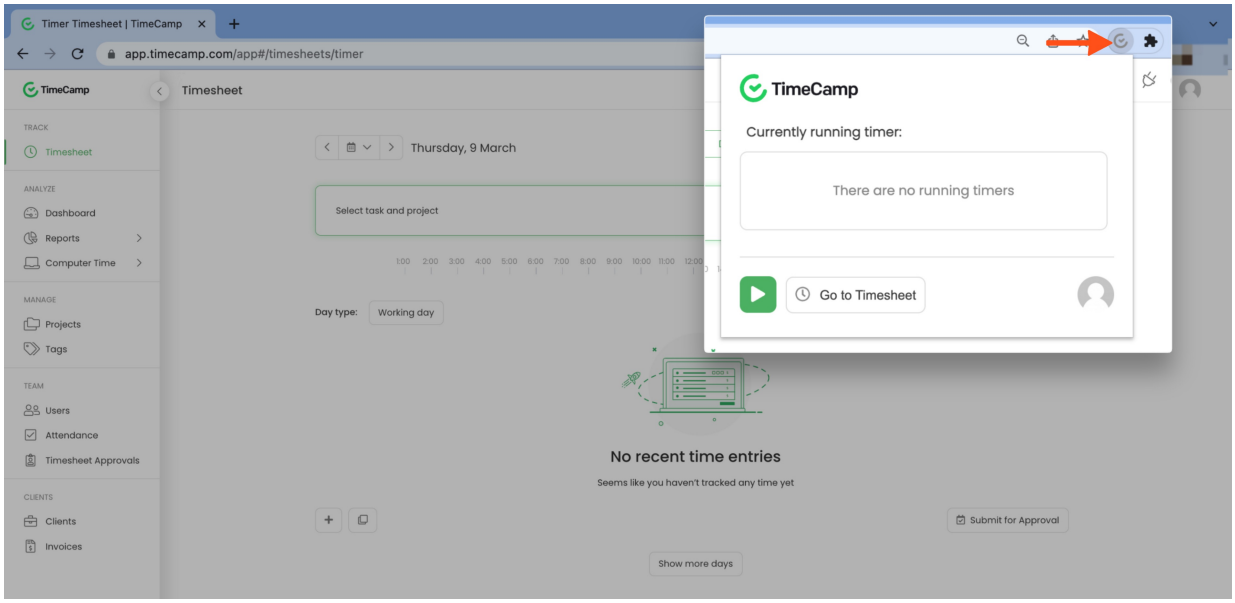
There are a few ways of tracking time in TimeCamp. After the integration is created and all your tasks are imported, you can simply select the desired task from the list and start your timer. Below you can find examples of all available ways of tracking time.

Web Timesheet. Simply select a task using a search box or the drop-down list and run the timer.Learn more

Desktop app. Click on the "No task" option in a task widget or use the option "Start a task" from the desktop app menu and use a search box or the drop-down list to find the target task. The task widget will be automatically synchronized with your web Timesheet. Learn more

Mobile app. Go to your Timesheet in the mobile app and click on the "Add" button if you want to create an entry manually or on the "Start" button if you prefer to track time in real time. Next use a search box or the drop-down list to find the target task and start tracking. Learn more

Browser plugin. If you installed the browser plugin and logged in to your TimeCamp account, just click on the plugin icon next to the URL address. Start the timer and select task without leaving the website you're working on. When you finished tracking just click on the red "Stop tracking" button. The browser plugin will be automatically synchronized with your web Timesheet. Learn more

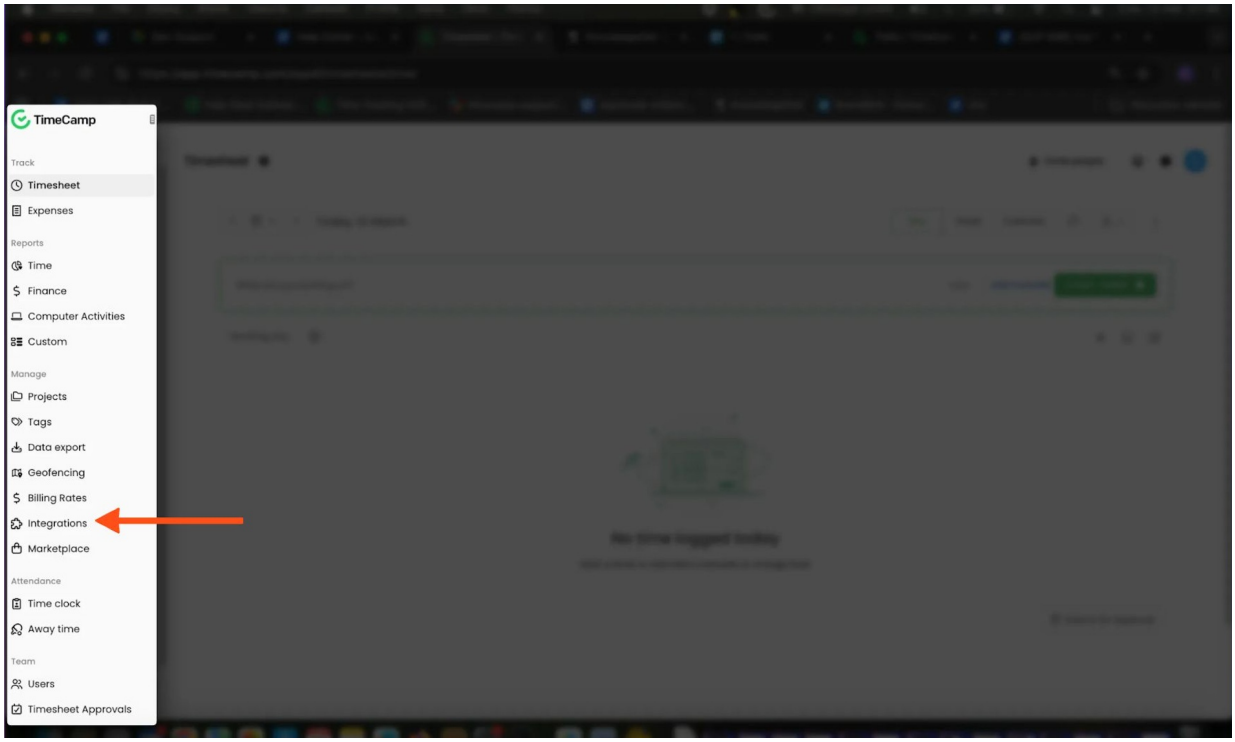


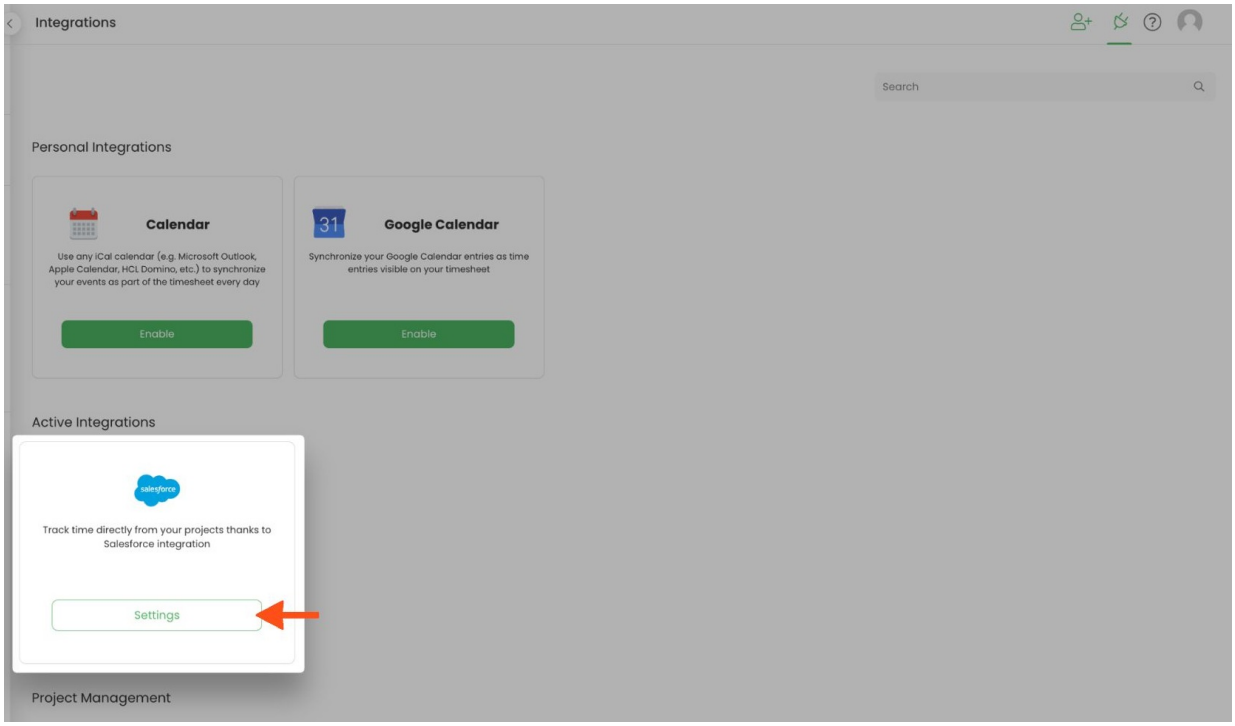
Disable integration

> Only the Administrator of the account can unlink or re-enable the integration.

Step 1

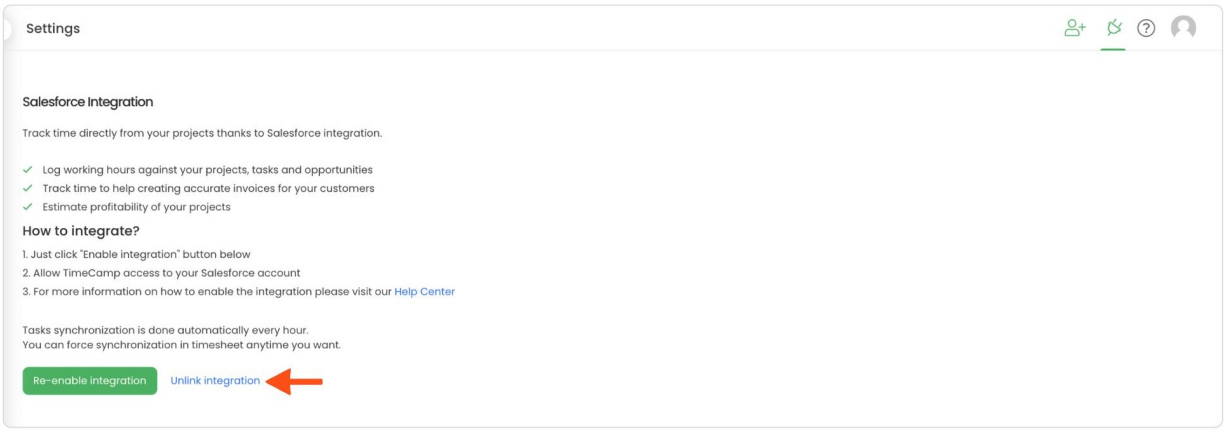
If for some reason you would like to re-enable or unlink the integration, select the**Integrations** option in the left panel. Next, find the **Salesforce** integration on the list of active integrations and click on its **Settings**.



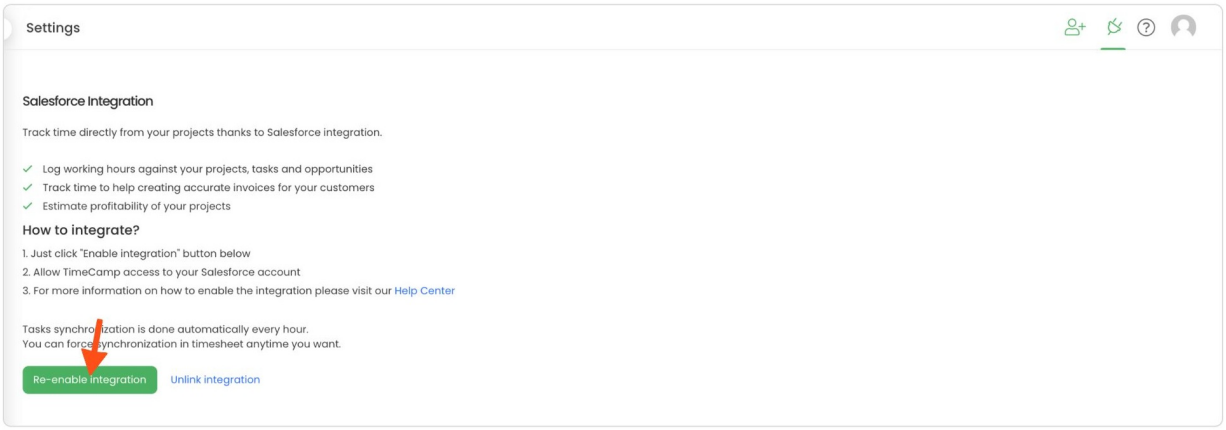


Step 2

Next, to unlink the integration simply click on the **Unlink integration** button.



To re-enable the integration click on the **Re-enable integration** button and proceed with the authorization again. The list of active items imported to TimeCamp will be updated immediately.


Settings
Salesforce Integration
Track time directly from your projects thanks to Salesforce integration.
Log working hours against your projects, tasks and opportunities
Track time to help creating accurate invoices for your customers
Estimate profitability of your projects
How to integrate?
1. Just click "Enable integration" button below
2. Allow TimeCamp access to your Salesforce account
3. For more information on how to enable the integration please visit our Help Center
Tasks synchronization is done automatically every hour.
You can force synchronization in timesheet anytime you want.
Re-enable integration
Unlink integration