Administrator Guide — Portfolio Sample

Installation and Configuration Documentation (Excerpt)

This document is a curated excerpt from a larger administrator guide for a custom Salesforce Field Service solution.

It is shared for portfolio purposes to demonstrate documentation structure, technical depth, and approach. Product names, component identifiers, and screenshots have been anonymized, and content has been selectively included to avoid disclosure of proprietary or client-specific information.

This sample is not a complete implementation guide.

Intended audience:
Salesforce System Administrators and implementation teams

1.877.123.4567 www.sample.com email@sample.com

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Introduction to the Field Service Extensions (Sample)

This documentation covers custom Salesforce Field Service solutions that enhances standard capabilities with additional features. The solution is designed to support technician safety, streamline field workflows, and provide dispatchers with better operational visibility.

The following configurable features are available:

- Working Alone Timer
- Panic Alert
- Mobile Layout
- Dynamic Status Transitions
- Mass Recurring Non-Availabilities
- Timesheets Management
- Time Rules Engine

Installation

Pre-Installation Requirements

Before installing the app, ensure that you have:

1. Enabled Field Service in your org.
    - Refer to Salesforce help document: Enable Field Service
2. Installed the latest Salesforce Field Service managed package.
    - Refer to Salesforce help document: Install the Field Service Managed Package
3. Assigned the appropriate Field Service Permission Set Licenses and Permission Sets to users.
    - Refer to Salesforce help document: Field Service Permission Set Licenses
    - Refer to Salesforce help document: Assign Field Service Permissions
4. Configured the Field Service mobile app for your technician mobile users, including installation of the **Field Service Connected App** in your org.
    - Refer to Salesforce help document: Download the Field Service Connected App
    - Refer to Salesforce help document: Give Users Access to the Field Service Mobile App

Field Service Permission Set Licenses and Permission Sets

Ensure that users in your org are assigned the appropriate Field Service Permission Set Licenses and Permission Sets as outlined in the table below.

Refer to Salesforce help documentation:

- Field Service Permission Set Licenses
- Assign Field Service Permissions

User	Permission Set License	Permission Set
Dispatcher	Field Service Dispatcher	Field Service Dispatcher License Field Service Dispatcher Permissions
Technicians (Mobile Users)	Field Service Mobile Field Service Scheduling	Field Service Resource License Field Service Resource Permissions Field Service Mobile License

Install the App

To install the app:

1. Click the installation link provided to you by the vendor.
2. Login to the Salesforce org where you want to install the app.
3. Select **Install for Admin Users Only** and then click **Install.**

   The installation may take a while. Check your email for confirmation that the installation was successful.
4. When the installation is complete, go to Setup and confirm the installation in **Installed Packages.**

After confirming a successful installation of the managed package, you can begin configuring your Salesforce org using the procedures outlined in the relevant sections of this guide for each feature enabled in your implementation.

NOTE: With the package, features are enabled or disabled by the ISV based on your organization's license. Depending on your implementation, some features described in this guide may not be available in your environment.

Assign Package Licenses

The app is a licensed managed package. After installation, you must assign a package license to each user who requires access to the app's functionality. This includes System Administrators, dispatchers, and mobile technician users.

1. From Setup, enter installed packages in the Quick Find box, and select **Installed Packages.**

2. Click **Manage Licenses** next to the SFS Extensions.

3. From the Package Manager page, click **Add Users**.

4. Locate the users in the Available Users list and use the checkboxes to select. The selected users will show in the Selected Users section.

5. Once you have selected all the users you want to assign licenses to, click **Add**.

NOTE: Users who do not have a package license assigned will not be able to access any app functionality, including System Administrators responsible for configuration.

Technician Safety and Alert System

The Technician Safety and Alert System is part of the Field Service Extensions (Sample) suite, designed to help organizations protect mobile technicians working in hazardous or isolated environments.

The alert system includes two features:

1. Working Alone Timer
2. Panic Alert

These features generate real-time alerts for dispatchers to enable timely intervention and improve technician safety.

Both features create Alert records and use dispatcher-facing tools such as pop-up notifications and utility panels, to ensure safety events are visible, trackable, and actionable. Whether for planned high-risk work or unexpected emergencies, these features support a proactive approach to technician safety.

Working Alone Timer

The Working Alone Timer allows technicians to set a timer when working alone in a high-risk situation. If the timer expires without cancellation, dispatchers can proactively check in and provide support.

Key Components:

- **Quick Action Trigger:** Accessed from a Service Appointment in the mobile app. Technicians can start a timer and add a comment.
- **Real-Time Notification:** Dispatchers receive a persistent pop-up alert that remains active until acknowledged.
- **Alerts Utility Panel:** Displays all active alerts with technician details and related appointments for dispatcher visibility.
- **Alert Records:** Automatically created to log timer events, including start/end times and technician info. These support auditing and safety reporting.

Panic Alert

The Panic Alert feature provides a one-touch emergency option for technicians to instantly notify dispatchers when urgent assistance is required.

Key Components:

- **Quick Action:** Sends an instant alert from the Field Service mobile app without any timer delays.
- **Real-Time Notification:** Dispatchers receive a pop-up alert that remains active until actioned.
- **Alert Records:** Created automatically with timestamp, location, technician, and related Service Appointment for incident tracking.

Metadata

Custom Object: Alert

Field Label	API Name	Data Type	Description
Accepted By	AcceptedById__c	Lookup (User)	User that accepted the alert.
Accepted Time	AcceptedTime__c	Date/Tijme	Populates with the Date/Time that the alert was accepted.
Alert Location	LocationCoordinates__c	Geolocation	Populates the Latitude and Longitude from the mobile of technician that started the Working Alone Timer or Panic Alert.
Alert No.	Name	Auto Number	Format: A-{0000}
Comments	Comments__c	Long Text Area	Text entered by the technician in the Comments field within the working alone timer on the Field Service mobile app.
Completed By	CompletedById__c	Lookup (User)	Populates with the user who completed the alert.
Completed Time	CompletedTime__c	Date/Time	Auto-populates with the timestamp of when the mobile user or dispatcher completed the working alone timer or panic alert. This field remains empty in cases where the timer expired, and the alert status is escalated.
Created By	CreatedById	Lookup(User)	Populates with user who created the Alert record by starting a working alone timer or sending a panic alert.

Initial Duration (Mins)	InitialDuration__c	Number (18,0)	Auto-populates with the Duration set by the technician when the working alone timer starts.
Received Time	ReceivedTime__c	Date/Time	Timestamp of when the alert was received by the system/dispatcher. In most cases this will be the same timestamp as the Start Time (when the working alone timer is started), but for cases when there is no network connectivity. This information can be used for reporting purposes.
Record Type	RecordTypeId	Record Type	Indicates whether the Alert record is for a **Working Alone Timer** or **Panic Alert.** This field is automatically populated when the alert is generated, based on the type of safety event triggered.
Resource	Resource__c	Lookup (User)	Auto-populates with Service Resource (technician) that started the working alone timer or sent a panic alert.
Service Appointment	ServiceAppointment__c	Lookup (Service Appointment)	Auto-populates with Service Appointment that the working alone timer was started from.
Start Time	AlertDateTime__c	Date/Time	Timestamp of when the working alone timer or panic alert was started.
Status	Status__c	Picklist	Automatically updates values as Alert transitions through statuses: **New –** working alone timer started, and alert not yet accepted by a dispatcher. **Accepted** – dispatcher has accepted the working alone timer. **Completed** – working alone timer has been completed by technician or dispatcher or panic alert completed by dispatcher. **Escalated** – working alone timer expired before technician completed the working alone timer. **Sent –** Panic Alert sent. **Actioned** – Panic Alert actioned by dispatcher.
Total Duration (mins)	AlertDurationTime__c	Number (6,0)	Total Duration for working alone timer. Initial Duration + any duration added by technician while timer is active.

Configuration

Once the package is installed, complete the following configuration tasks. Each task below links to a detailed step-by-step procedure.

- Set Up Service Resources and Service Territories
  Dispatchers and technicians must be set up as service resources and added as members of service territories. Dispatchers will receive working alone alerts and panic alerts from technicians who are members of their service territory.

- Assign Permission Sets
  Permission sets included with the package and must be assigned to mobile technician users and dispatcher users.

- Configure Alerts Custom Utility Item
  Dispatcher users require access to the Alerts custom utility item to view and manage incoming alerts from their technicians.

- Add Panic Alert Global Action
  Add the provided Panic Alert global action to the appropriate Publisher Layout(s) to make it available in the Field Service mobile app's Actions menu.

- Configure Panic Alert Confirmation Prompt
  Use the Panic Alert Settings custom setting to enable or disable the confirmation dialog before sending a Panic Alert. This can be configured at the org, profile, or user level.

- Add Working Alone Timer Action to Service Appointment Page Layouts
  Add the Working Alone Timer quick action to Service Appointment page layouts so technicians can launch the timer from the Field Service mobile app.

- Add Duration Options and Modify Reminder Frequencies
  Use the Times and Frequencies Configuration custom metadata to add custom timer durations and define countdown reminder intervals to suit your organization's needs.

- Customize Alerts Using Field Sets
  Use the provided field sets on the Alert object to customize the information displayed in pop-up notifications, the utility panel, and alert detail views.

- Configure a Flow to Launch After Working Alone Timer is Completed
  If your business processes require follow-up actions after a technician completes a Working Alone Timer, configure a Flow to launch automatically upon timer completion. This can be assigned by profile.

Set Up Service Resources and Service Territories

IMPORTANT TO NOTE

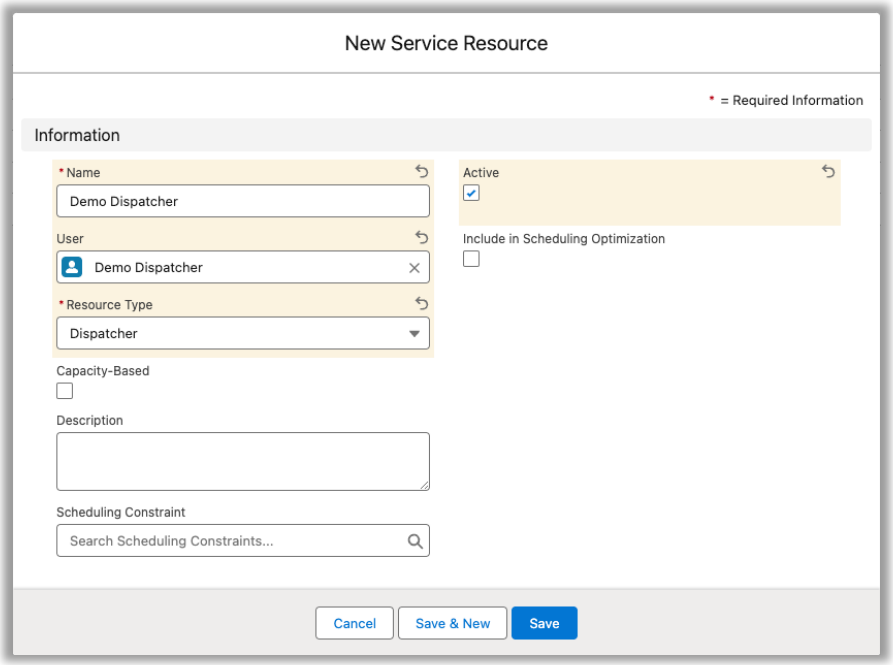
For the Working Alone Timer and Panic Alert functionality, the Service Territory membership determines which alerts the dispatchers will see from mobile technicians. Dispatchers will only get alerts for technicians that are members of their Service Territory.

Ensure that a Service Resource is created for your dispatchers and that they are added to the correct service territories.

Refer to Salesforce help documentation: Create Service Resources for Field Service

Create Dispatcher Service Resource:

1. Navigate to the Service Resources tab, from the list view, click **New**.
2. Enter a resource **Name**.
3. From the **User** field, select the dispatcher user.
4. Select **Dispatcher** from the Resource Type picklist field.
5. Enable **Active** checkbox and then click **Save**.



A Service Resource record is now created for this user as a Dispatcher resource type.

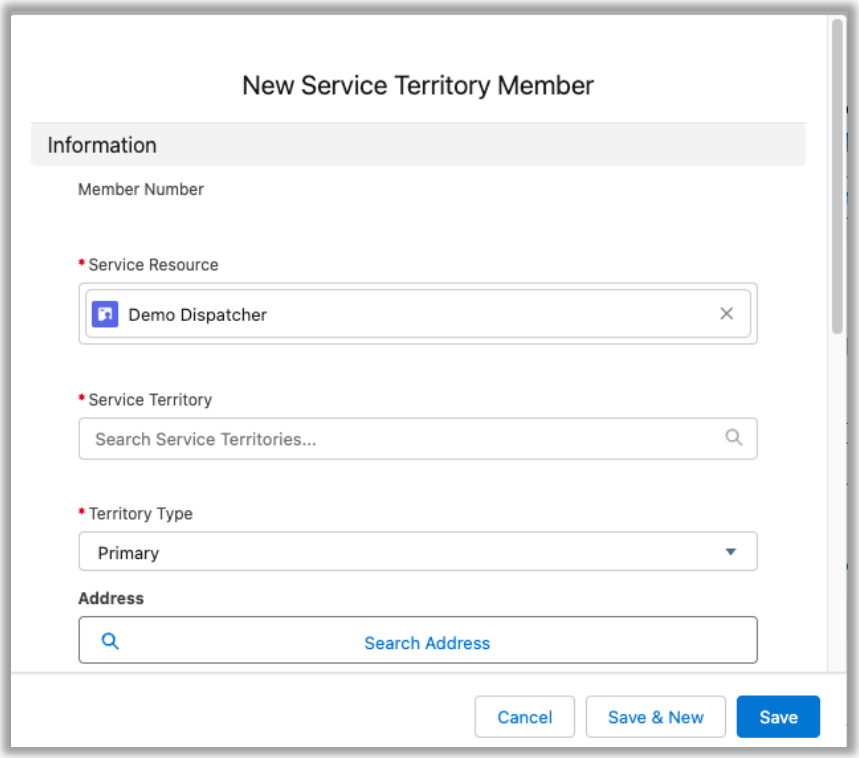
Add Dispatcher as a Service Territory Member

Once the dispatcher Service Resource is created, the service resource can now be added as a Service Territory Member.

1. Open the Service Resource record for the dispatcher.

2. Navigate to the Service Territories related list and click **New**.
   The Service Resource is selected (from the related list).

3. Select a Service Territory (or create new).



4. Set the Territory Type, enter an address and then click **Save**.

A new Service Territory Member record is created, and the Dispatcher Service Resource is now a member of the selected Service Territory.

Give Access to Lightning Web Component (LWC) on Field Service Mobile

To ensure LWC-based quick actions display properly in the Field Service mobile app, you must enable the **Lightning SDK for Field Service Mobile** system permission for your mobile users.

To enable this system permission:

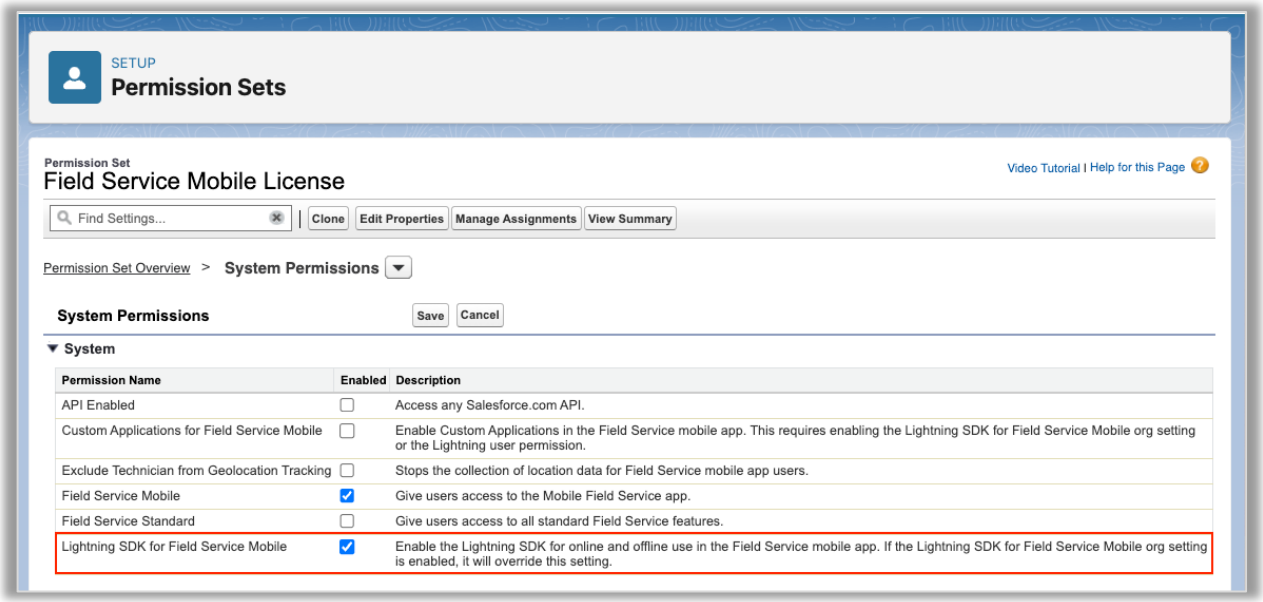
1. From Setup, enter Permission Sets in the Quick Find box and select **Permission Sets.**

2. Choose an existing permission set assigned to your Field Service mobile users or create a new permission set.

   NOTE: You can modify the existing **Field Service Mobile License,** or any other set currently assigned to your mobile users.

3. In the selected permission set, click **System Permissions,** then click **Edit**.

4. Select **Lightning SDK for Field Service Mobile**, then click **Save.**



5. If you created a new permission set, click **Manage Assignments**, and assign it to your technician users.

   If you updated an existing permission set (e.g., Field Service Mobile License), no further action is needed – users already assigned to that permission set will have access.

IMPORTANT TO NOTE

If the Lightning SDK for Field Service Mobile permission is not enabled for a user, then the Working Alone Timer quick action or Panic Alert global action will not be available in the Actions menu on the Field Service mobile app for the user, even if the component is configured.

Assign Permissions to Dispatchers

To enable dispatchers to receive Panic Alerts and Working Alone Timer notifications from mobile technicians, assign the provided **Alerts for Dispatcher Users** permission set included with the package.

This permission set provides the required access for dispatchers to view, manage, and act on safety alerts in real time through the utility panel and pop-up notifications. Assign the permission set to all users responsible for monitoring technician safety in the Field Service console.

Create Permission Set for Dispatchers and Technicians

To enable alerts to flow from mobile technicians to dispatchers, both roles must have **View All** access to the following standard Salesforce objects:

- Service Resources
- Service Territories
- Operating Hours

You must create a custom permission set and assign it to all dispatchers and technicians using the Alerts for Technician Safety features.

1. From Setup, in the Quick Find box, enter Permission Sets, and then select **Permission Sets.**

2. Click **New.**

3. In the Create window, enter permission set information:

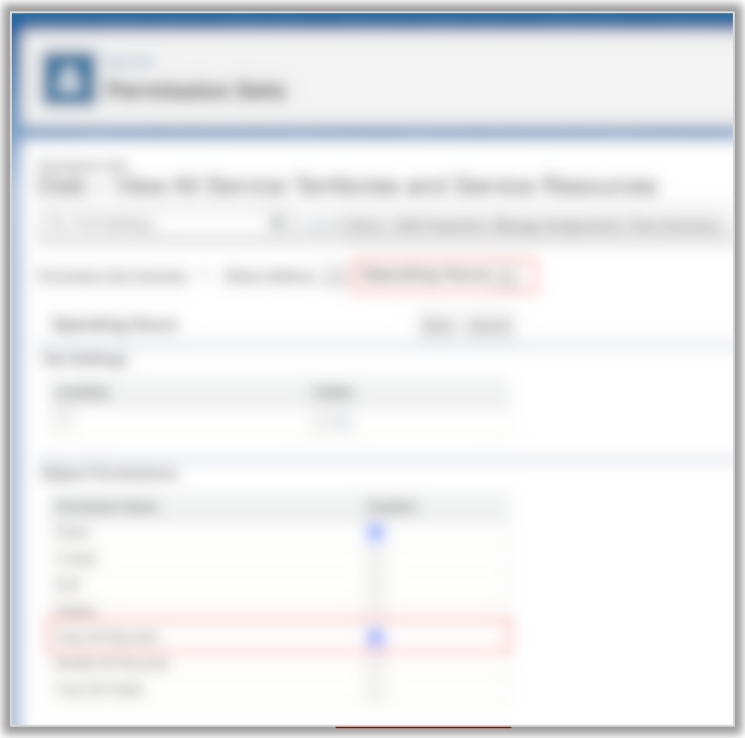
    a. **Label:** View All Service Territories and Service Resources

    b. **License:** Leave as None (or choose based on your org setup)

c. Click **Save**.

4. In the new permission set, navigate to **Object Settings**.

5. For each of the following objects, click the object name, then click **Edit,** and enable **View All**:
   a. Service Resources
   b. Service Territories
   c. Operating Hours
6. Save your changes, then click **Manage Assignments** to assign the permission set to your dispatcher and technician users.



Configure Alerts Custom Utility Item for Dispatchers

The **Working Alone Timer** and **Panic Alert** features rely on a custom utility item called AlertMessagesInUtilityBar to display real-time alerts to dispatchers in the Field Service console.

The **Field Service Extensions (Sample) Lightning app**, included with the managed package, comes preconfigured with:

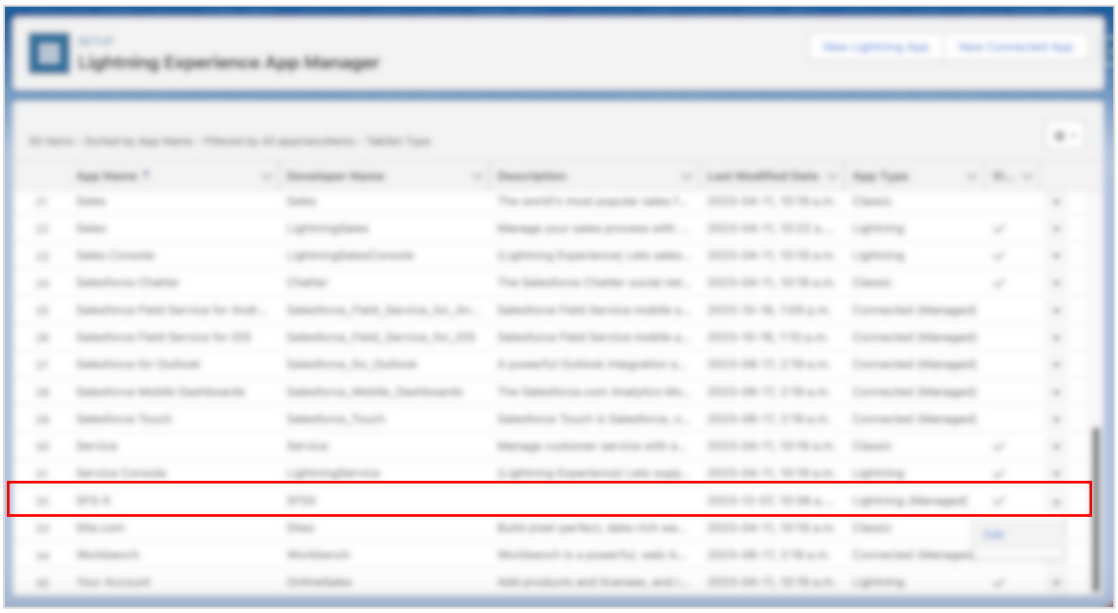
- Standard Field Service navigation items
- The **Alerts** tab (which displays alert records)
- The **Alerts** custom utility item (to display real-time notifications)

You may either customize the provided Lightning app or create a new custom Lightning app with the necessary items.

To customize and assign the Lighting app:

1. From Setup, in the Quick Find box, enter App Manager, and then select **App Manager**.

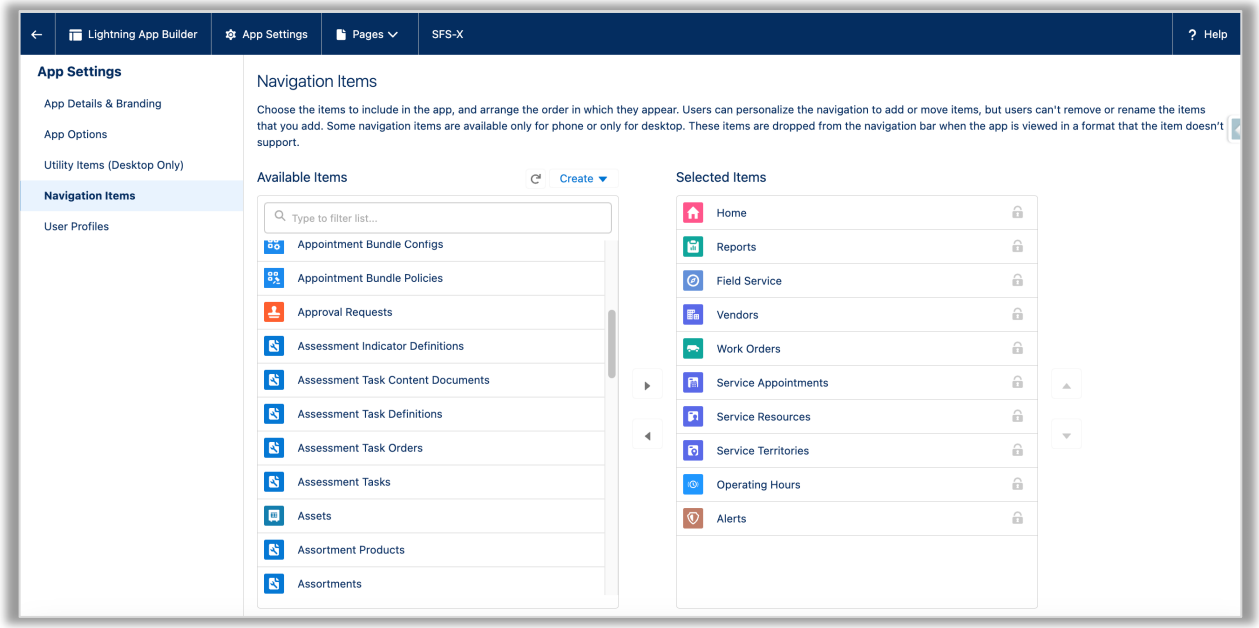
2. Locate the **Field Service Extensions (Sample) Lightning app**, click drop-down arrow and select **Edit**.



3. Click **App Details & Branding** to optionally customize the App Name, Image, Primary Color, and Description.

4. Click **Navigation Items** to add items to the navigation bar. The Alerts custom navigation item is already added.

NOTE: With a managed package, you can add navigation items, but you cannot remove or reorder the navigation items that are configured with the provided Lightning app.



You cannot add or remove utility items for an app that is part of a managed package. If you have other utility items, then you must create a new Lightning app or edit an existing Lightning app for Field Service and add the Alerts custom utility item to the app instead.

Assign the App to Users

Users must be assigned access to the app before they can use it. Access can be granted through user profiles or a permission set.

To assign the app using profiles:

1. From Setup, enter Profiles in the Quick Find box and select **Profiles**.
2. Click the name of the profile you want to update.
3. Under Assigned Apps, click **Edit**.
4. Select the **Field Service Extensions (Sample) Lightning app** and save.

Note: Make sure all dispatcher user profiles that require access to the Alerts utility item are included.

Alternatively, you can create a **permission set** that includes app access and assign it to the relevant users.