



# SFS-X

## Installation and Configuration Guide





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## Introduction to SFS-X App for Field Service

The SFS-X (SFS Extensions) app enhances core Field Service capabilities with additional features designed to improve technician safety, increase productivity, and provide dispatchers with greater visibility and control.

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 SFS-X App ensure that you have:

- Enabled Field Service in your org.
  - Refer to Salesforce help document: [Enable Field Service](#)
- Installed the latest Salesforce Field Service managed package.
  - Refer to Salesforce help document: [Install the Field Service Managed Package](#)
- 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](#)
- 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 SFS-X Package

To install the SFS Extensions app:

1. Click the installation link provided to you by Diabsolut.
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 SFS-X 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 SFS-X managed 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 SFS-X 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.

- From Setup, enter installed packages in the Quick Find box, and select **Installed Packages**.
- Click **Manage Licenses** next to the SFS Extensions.

The screenshot shows the 'Installed Packages' section of the Salesforce Setup. It lists several packages, including 'FSL', 'Salesforce Connected Apps', 'Field Service App Package', and 'SFS Extensions'. The 'SFS Extensions' row has a red box around its 'Manage Licenses' link. The page includes standard Salesforce navigation and help links.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange
Uninstall   Manage Licenses	FSL	Salesforce	246.0.75	FSL	Active	Unlimited	0	<input type="checkbox"/>	Does not Expire	2023-11-07, 9:01 a.m.	<input type="checkbox"/>	2	7	52	Not Passed
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	Free	N/A	N/A	N/A	N/A	2023-11-17, 3:07 a.m.	<input checked="" type="checkbox"/>	0	0	0	Not Passed
Uninstall	Salesforce Field Service App Package	Salesforce	1.52	sf_fieldservice	Free	N/A	N/A	N/A	N/A	2023-11-07, 9:23 a.m.	<input checked="" type="checkbox"/>	0	0	0	Not Passed
Uninstall   Manage Licenses	SFS Extensions	Diabsolut Inc.	1.2	diab_sfs_ext	Active	5	1	<input type="checkbox"/>	Does not Expire	2024-01-23, 8:37 a.m.	<input checked="" type="checkbox"/>	1	1	1	Passed

**Uninstalled Packages**  
No uninstalled package data archives

- From the Package Manager page, click **Add Users**.
- Locate the users in the Available Users list and use the checkboxes to select. The selected users will show in the Selected Users section.
- 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 SFS-X functionality, including System Administrators responsible for configuration.



## Assign Permission Set for all SFS-X Users

All users who require access to any SFS-X feature must be assigned the **Diab – SFSX All Users** permission set.

The table below summarizes the **Diab – SFSX All Users** permission set.

Permission Set Category	Description
Apex Class Access	<p>Includes permission to execute the following Apex Classes:</p> <ul style="list-style-type: none"><li>• <code>diab_sfs_ext.CheckingFeatureAvailability</code></li><li>• <code>diab_sfs_ext.CustomExceptionHandler</code></li><li>• <code>diab_sfs_ext.UserDataFactory</code></li></ul>



## Technician Safety and Alert System

The Technician Safety and Alert System is part of the SFS-X app suite, designed to help organizations protect mobile technicians working in hazardous or isolated environments. It includes two key features: **Working Alone Timer** and **Panic Alert** - which generate real-time alerts for dispatchers to enable timely intervention and improve field safety.

Both features create Alert records and use dispatcher-facing tools like 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 tools 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	CreatedBy	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 <b>Working Alone Timer</b> or <b>Panic Alert</b> . 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	<p>Automatically updates values as Alert transitions through statuses:</p> <p><b>New</b> – working alone timer started, and alert not yet accepted by a dispatcher.</p> <p><b>Accepted</b> – dispatcher has accepted the working alone timer.</p> <p><b>Completed</b> – working alone timer has been completed by technician or dispatcher or panic alert completed by dispatcher.</p> <p><b>Escalated</b> – working alone timer expired before technician completed the working alone timer.</p> <p><b>Sent</b> – Panic Alert sent.</p> <p><b>Actioned</b> – Panic Alert actioned by dispatcher.</p>
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.



## Field Sets: Alert Object

The following field sets are provided to allow customization of the fields displayed in alert-related components for Working Alone Timer and Panic Alerts. These field sets determine which fields are visible in pop-up notifications, utility panels, and mobile views.

### Working Alone Timer

- **Alert Details**  
Defines the fields shown in the Alert Details window when the View button is clicked from a Working Alone Timer alert in the utility panel.
- **Alert Mobile UI Fields**  
Specifies the fields visible to mobile users within the Working Alone Timer component.
- **Alerts – Pop-Up Notifications**  
Controls the fields displayed in pop-up notifications for Working Alone Timer alerts triggered by technicians.
- **Utility Panel Alerts**  
Configures the fields visible directly on the Working Alone Timer within the utility panel before opening full alert details.

### Panic Alerts

- **Panic Alert Details**  
Defines the fields shown in the Alert Details window when the View button is clicked from a Panic Alert in the utility panel.
- **Panic Alert Mobile UI Fields**  
Specifies the fields visible to mobile users in the Panic Alert interface.
- **Panic Alerts – Pop-Up Notifications**  
Controls the fields displayed in pop-up notifications for Panic Alerts.
- **Utility Panel Panic Alerts**  
Configures the fields visible directly on the Panic Alert within the utility panel before opening full alert details.

## Lightning Web Component: Service Appointment Object

**Working Alone Timer:** Lightning Web Component configured as a quick action from Service Appointments in the Field Service mobile app. Enables mobile technicians to set and start a Working Alone Timer, which creates an alert record and notifies dispatchers in real time.



## Lightning Web Component: Publisher Layout

**Panic Alert:** Lightning Web Component configured as a global action on the publisher layout for Field Service mobile app users. Allows technicians to quickly trigger a Panic Alert from anywhere in the app, creating an alert record and sending an immediate notification to dispatchers.

## Custom Metadata Types for Working Alone Timer

**Times and Frequencies Configuration:** Defines the available timer durations (labels and values) that technicians can select when starting a Working Alone Timer. Also used to configure the countdown frequency for reminder notifications sent to dispatchers as the timer approaches expiry.

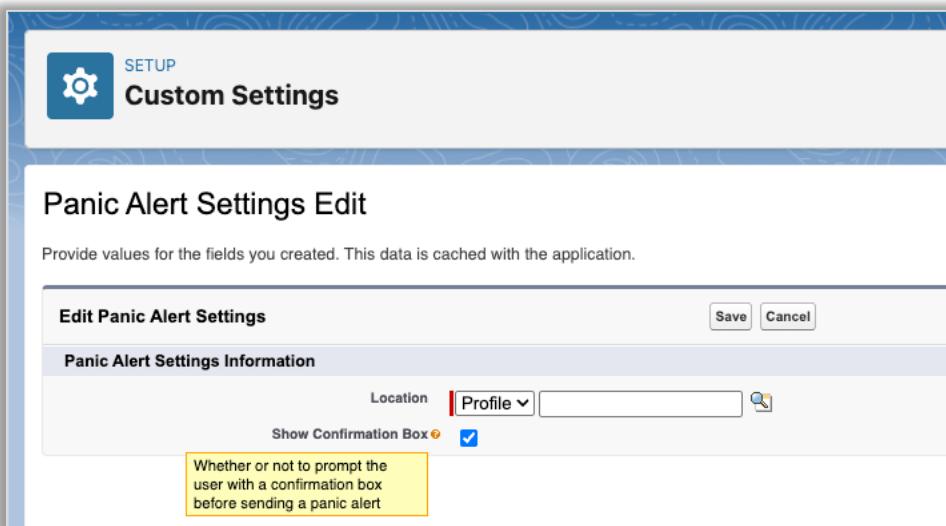
**Working Alone Timer Settings:** Used to configure the Flow that runs automatically when a Working Alone Timer is completed. This can be assigned by profile to tailor behaviour by role. You can also specify the field set used to display technician-facing fields in the Working Alone Timer component.

## Custom Settings for Panic Alert

### Panic Alert Settings

This custom setting controls whether users are prompted with a confirmation dialog before sending a Panic Alert. The setting can be applied at the organization, profile, or user level.

When enabled, mobile users see a confirmation message after tapping the Panic Alert action, allowing them to either confirm or cancel the panic alert before it is sent.





## Configuration

Once the SFS-X package is installed, if your org has the Working Alone Timer or Panic Alert feature enabled, 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 are included in the SFS-X 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 already selected (from the related list).
3. Select a Service Territory (or create new).

New Service Territory Member

Information

Member Number

\* Service Resource

Demo Dispatcher

\* Service Territory

Search Service Territories...

\* Territory Type

Primary

Address

Search Address

Cancel Save & New Save

4. Set the Territory Type, enter and 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.



## Assign Permissions to Technicians

To enable mobile technicians to use the Panic Alert and Working Alone Timer features in the Field Service mobile app, assign the **Diab - Alerts for Field Service Mobile App Users** permission set included with the SFS-X managed package.

This permission set grants the required access to launch safety actions directly from the mobile app. It should be assigned to all technicians expected to use these features in the field.

The table below summarizes the permissions included in the **Diab - Alerts for Field Service Mobile App Users** permission set.

Permission Set Category	Description
Object Settings for Alert	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>• Not available</li> </ul> <p>Object permissions</p> <ul style="list-style-type: none"> <li>• Read, Create, Edit</li> </ul> <p>Field permissions</p> <p>Edit access to:</p> <ul style="list-style-type: none"> <li>• Accepted By</li> <li>• Accepted Time</li> <li>• Alert Location</li> <li>• Comments</li> <li>• Completed By</li> <li>• Completed Time</li> <li>• Initial Duration (Mins)</li> <li>• Received Time</li> <li>• Resource</li> <li>• Service Appointment</li> <li>• Start Time</li> <li>• Status</li> <li>• Total Duration (Mins)</li> <li>• Type</li> <li>• Work Order</li> </ul>
Object Settings for Alert Events	<p>Includes the following object permissions:</p> <ul style="list-style-type: none"> <li>• Read, Create</li> </ul>



Apex Class Access	Includes permission to execute the following Apex Classes:
	<ul style="list-style-type: none"> <li>• AlertDatasource</li> <li>• AlertMessageController</li> <li>• AlertTriggerHandler</li> <li>• FieldsetViewController</li> </ul>
Custom Metadata Types	Includes permission to access the following Custom Metadata Types:
	<ul style="list-style-type: none"> <li>• Times and Frequencies Configuration</li> <li>• Working Alone Timer Settings</li> </ul>

### *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**.

The screenshot shows the Salesforce Setup interface for managing Permission Sets. The current view is on the 'Field Service Mobile License' permission set. Under the 'System Permissions' tab, there is a table listing several permissions. The last permission listed, 'Lightning SDK for Field Service Mobile', has its checkbox checked and is highlighted with a red border, indicating it is selected.

Permission Name	Enabled	Description
API Enabled	<input type="checkbox"/>	Access any Salesforce.com API.
Custom Applications for Field Service Mobile	<input type="checkbox"/>	Enable Custom Applications in the Field Service mobile app. This requires enabling the Lightning SDK for Field Service Mobile org setting or the Lightning user permission.
Exclude Technician from Geolocation Tracking	<input type="checkbox"/>	Stops the collection of location data for Field Service mobile app users.
Field Service Mobile	<input checked="" type="checkbox"/>	Give users access to the Mobile Field Service app.
Field Service Standard	<input type="checkbox"/>	Give users access to all standard Field Service features.
Lightning SDK for Field Service Mobile	<input checked="" type="checkbox"/>	Enable the Lightning SDK for online and offline use in the Field Service mobile app. If the Lightning SDK for Field Service Mobile org setting is enabled, it will override this setting.

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 **Diab – Alerts for Dispatcher Users** permission set included with the SFS-X 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 it to all users responsible for monitoring technician safety in the Field Service console.



The table below summarizes the permissions included in the **Diab – Alerts for Dispatcher Users** permission set.

Permission Set Category	Description
Object Settings for Alert	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>• Available, Visible</li> </ul> <p>Includes the following object permissions:</p> <ul style="list-style-type: none"> <li>• Read, Edit, Delete, View All, Modify All</li> </ul> <p>Includes Edit access for the following custom fields:</p> <ul style="list-style-type: none"> <li>• Accepted By</li> <li>• Accepted Time</li> <li>• Alert Location</li> <li>• Comments</li> <li>• Completed By</li> <li>• Completed Time</li> <li>• Initial Duration (Mins)</li> <li>• Received Time</li> <li>• Resource</li> <li>• Service Appointment</li> <li>• Start Time</li> <li>• Status</li> <li>• Total Duration (Mins)</li> <li>• Type</li> <li>• Work Order</li> </ul>
Object Settings for Alert Events	<p>Includes the following object permissions:</p> <ul style="list-style-type: none"> <li>• Read, Create</li> </ul>
Apex Class Access	<p>Includes permission to execute the following Apex Classes:</p> <ul style="list-style-type: none"> <li>• AlertDatasource</li> <li>• AlertMessageController</li> <li>• AlertTriggerHandler</li> <li>• FieldsetViewController</li> </ul>
Custom Metadata Types	<p>Includes permission to access the following Custom Metadata Types:</p> <ul style="list-style-type: none"> <li>• Times and Frequencies Configuration</li> <li>• Working Alone Timer Settings</li> </ul>



## Create Permission Set for Dispatchers and Technicians

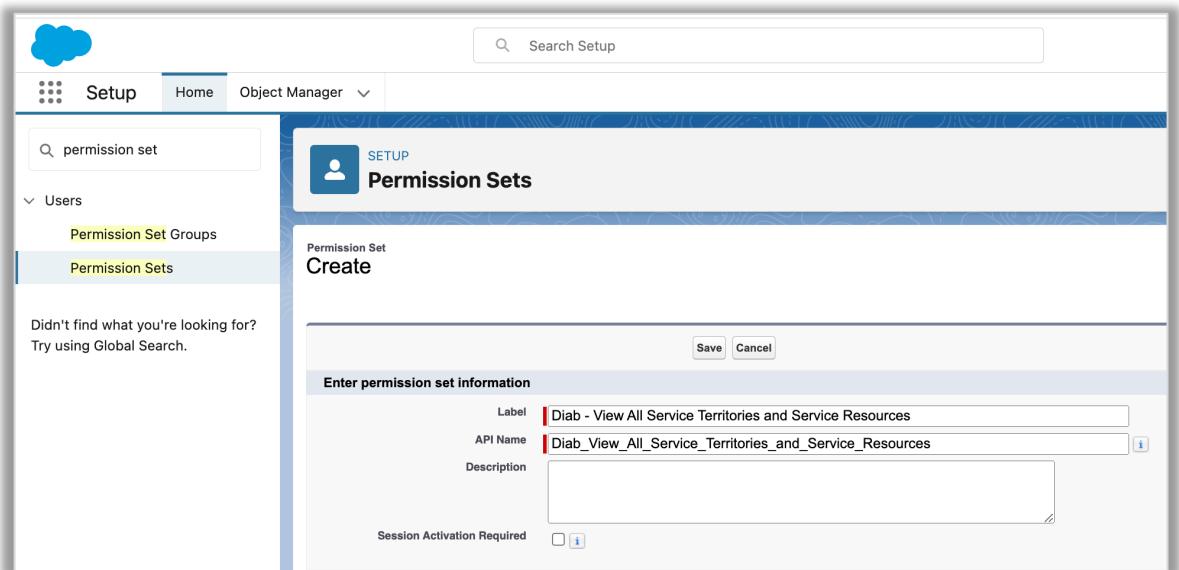
To enable alerts to flow from mobile technicians to dispatchers, both roles must have **View All** access to the following standard Salesforce objects:

- Service Resources
- Service Territories
- Operating Hours

Because these are standard Salesforce objects, the required permissions cannot be packaged and must be configured manually.

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:** Diab – 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.

**SETUP**

## Permission Sets

Permission Set  
Diab – View All Service Territories and Service Resources

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings ▾ **Service Resources** ▾

**Service Resources** Save | Cancel

**Tab Settings**

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

**Object Permissions**

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
<b>View All Records</b>	<input checked="" type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

**SETUP**

## Permission Sets

Permission Set  
Diab – View All Service Territories and Service Resources

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings ▾ **Service Territories** ▾

**Service Territories** Save | Cancel

**Tab Settings**

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

**Object Permissions**

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
<b>View All Records</b>	<input checked="" type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

**SETUP**

## Permission Sets

Permission Set  
Diab – View All Service Territories and Service Resources

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings ▾ **Operating Hours** ▾

**Operating Hours** Save | Cancel

**Tab Settings**

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/>

**Object Permissions**

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
<b>View All Records</b>	<input checked="" type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>



## 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 **SFS-X Lightning app**, included with the SFS-X 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 **SFS-X Lightning app** or create a new custom Lightning app with the necessary items.

To customize and assign the SFS-X Lighting app:

1. From Setup, in the Quick Find box, enter App Manager, and then select **App Manager**.
2. Locate the **SFS-X Lightning app**, click drop-down arrow and select **Edit**.

The screenshot shows the 'Lightning Experience App Manager' interface. At the top, there are buttons for 'New Lightning App' and 'New Connected App'. Below is a table with columns: App Name, Developer Name, Description, Last Modified Date, App Type, and various edit and delete icons. The 'SFS-X' row is highlighted with a red box. The table data is as follows:

35 items · Sorted by App Name · Filtered by All appmenuitems ~ TabSet Type						
	App Name ↑	Developer Name	Description	Last Modified Date	App Type	Vi... ▾
21	Sales	Sales	The world's most popular sales f...	2023-04-11, 10:19 a.m.	Classic	▼
22	Sales	LightningSales	Manage your sales process with ...	2023-04-11, 10:22 a.m.	Lightning	✓ ▾
23	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales...	2023-04-11, 10:19 a.m.	Lightning	✓ ▾
24	Salesforce Chatter	Chatter	The Salesforce Chatter social net...	2023-04-11, 10:19 a.m.	Classic	✓ ▾
25	Salesforce Field Service for Andr...	Salesforce_Field_Service_for_An...	Salesforce Field Service mobile a...	2023-10-16, 1:09 p.m.	Connected (Managed)	▼
26	Salesforce Field Service for iOS	Salesforce_Field_Service_for_iOS	Salesforce Field Service mobile a...	2023-10-16, 1:10 p.m.	Connected (Managed)	▼
27	Salesforce for Outlook	Salesforce_for_Outlook	A powerful Outlook integration a...	2023-08-17, 2:19 a.m.	Connected (Managed)	▼
28	Salesforce Mobile Dashboards	Salesforce_Mobile_Dashboards	The Salesforce.com Analytics Mo...	2023-08-17, 2:19 a.m.	Connected (Managed)	▼
29	Salesforce Touch	Salesforce_Touch	Salesforce Touch is Salesforce, o...	2023-08-17, 2:19 a.m.	Connected (Managed)	▼
30	Service	Service	Manage customer service with a...	2023-04-11, 10:19 a.m.	Classic	✓ ▾
31	Service Console	LightningService	(Lightning Experience) Lets supp...	2023-04-11, 10:19 a.m.	Lightning	✓ ▾
32	<b>SFS-X</b>	<b>SFSX</b>		2023-12-07, 10:38 a.m.	Lightning (Managed)	✓ ▾
33	Site.com	Sites	Build pixel-perfect, data-rich we...	2023-04-11, 10:19 a.m.	Classic	Edit
34	Workbench	Workbench	Workbench is a powerful, web-b...	2023-08-17, 2:19 a.m.	Connected (Managed,	▼
35	Your Account	OnlineSales	Add products and licenses, and r...	2023-04-11, 10:19 a.m.	Lightning	✓ ▾

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 SFS-X Lightning (Managed)



app.

Available Items	Selected Items
Appointment Bundle Configs	Home
Appointment Bundle Policies	Reports
Approval Requests	Field Service
Assessment Indicator Definitions	Vendors
Assessment Task Content Documents	Work Orders
Assessment Task Definitions	Service Appointments
Assessment Task Orders	Service Resources
Assessment Tasks	Service Territories
Assets	Operating Hours
Assortment Products	
Assortments	Alerts

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 SFS-X App to Users

To provide users access to the SFS-X Lightning app, assign it via user profiles or a permission set.

To assign the app via 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 **SFS-X Lightning app** and save.

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

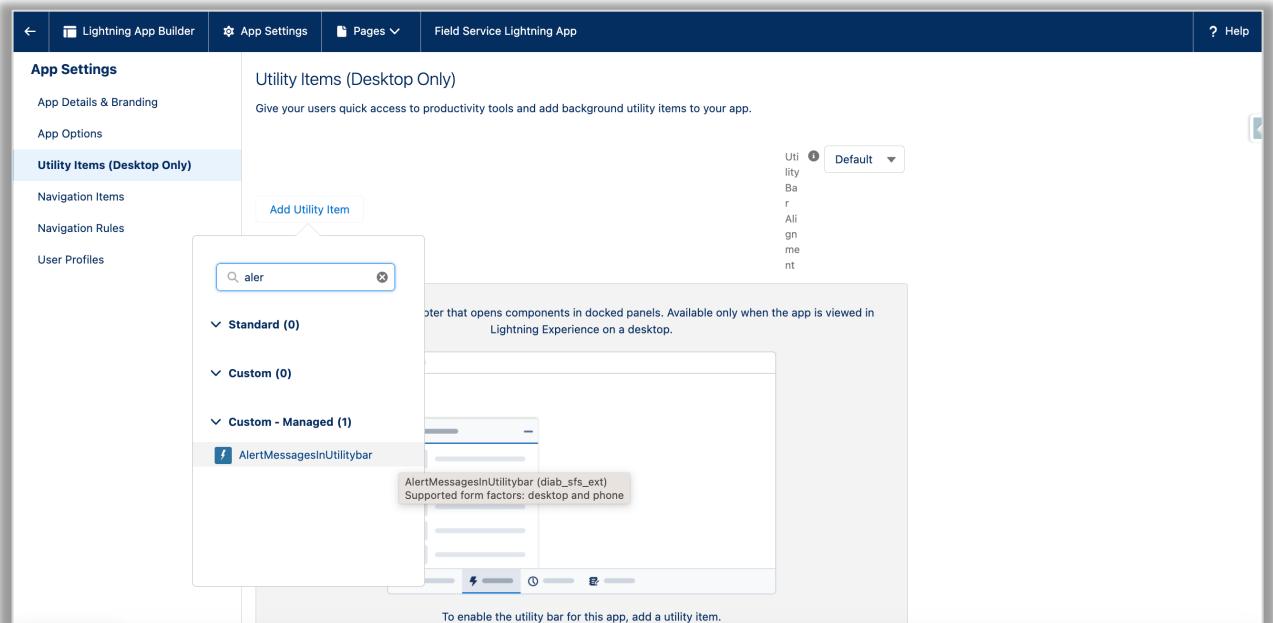
Alternatively, you can create a **permission set** that includes app access and assign it to the relevant users.



## Add Alerts Custom Utility Item to an Existing Field Service Lightning App

If your organization already uses a custom Lightning app for Field Service that is assigned to dispatcher users, you can enhance it by adding the Alerts custom utility item and the Alerts navigation tab. This ensures that dispatchers can receive and manage alerts from the Working Alone Timer and Panic Alert features.

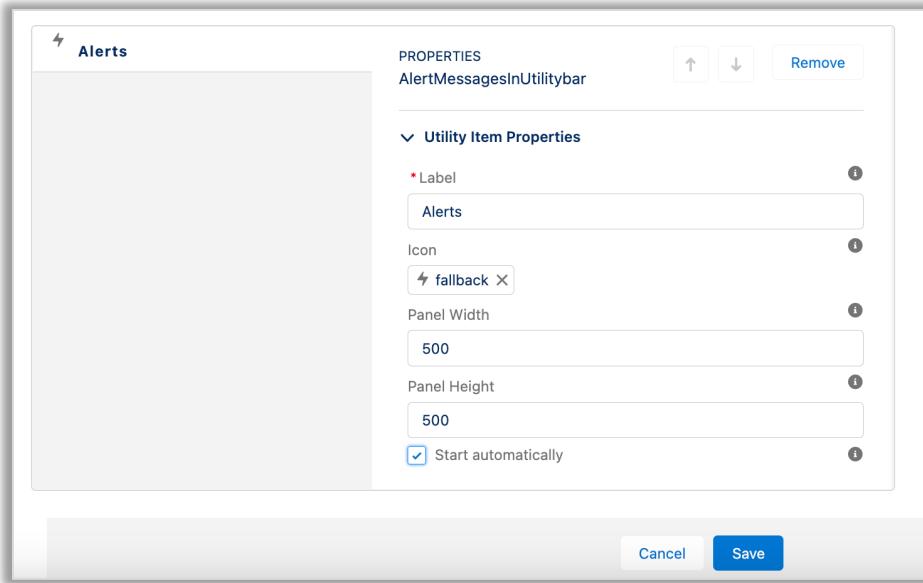
1. From Setup, in the Quick Find box, enter App Manager, and then select **App Manager**.
2. Locate your custom Lightning app for Field Service, and click **Edit** on arrow next to the app.
3. From App Settings, click **Utility Items (Desktop Only)**.
4. In right panel, click **Add Utility Item**.
5. Scroll to the Custom section and click **AlertMessagesInUtilitybar**.



6. Modify the Utility Item Properties:

- a. Enter a Label, e.g., Alerts.
- b. Optionally, change the default Icon.
- c. Set the Panel Width to 500 and the Panel Height to 500.

- d. Ensure to enable Start automatically and then click **Save**.



To add the Alerts tab to the navigation bar:

1. In the app editor, click **Navigation Items**.
2. Click **Add More Items**, search for Alerts, and add it to the selected items list.
3. Reorder as needed and click **Save**.
4. Once saved, assign or confirm that the updated app is available to your dispatcher user profiles.

Now that the Alerts custom utility item is added to your Field Service Lightning app, and assigned to profiles for dispatcher users, your dispatchers will have access to the alerts panel and receive alert notifications the next time they access this Field Service Lightning app.

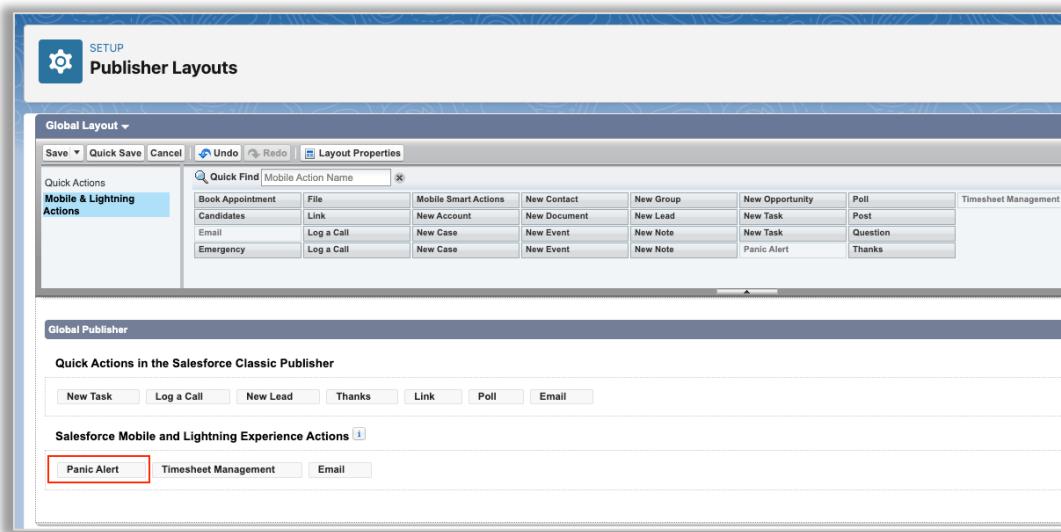
**NOTE:** Dispatchers will only receive alerts for technicians who are members of their Service Territory.

## Add Panic Alert Global Action to Publisher Layout

To make the Panic Alert feature available in the Field Service mobile app, a System Administrator must add the Panic Alert Lightning Web Component as a global action to the appropriate Publisher Layout(s). This ensures mobile technicians can access the action from the Actions menu in their Field Service mobile app.

**Important:** Only modify Publisher Layouts that are assigned to the user profiles of mobile technicians who will use the Panic Alert feature.

1. From Setup, in the Quick Find box, enter Publisher Layouts, and select **Publisher Layouts**.
2. Click **Edit** next to the publisher layout that corresponds to your Field Service mobile app users.
3. In the palette, click Mobile & Lightning Actions.
4. Drag the **Panic Alert** action into the Salesforce Mobile and Lightning Experience Actions section.



5. Click **Save** to apply the changes.

Once saved, the Panic Alert action will appear in the Actions menu of the Field Service mobile app for users assigned to that Publisher Layout.



### IMPORTANT TO NOTE

If a user does not see the Panic Alert action in their Actions menu, confirm that the [SDK for Field Service Mobile](#) system permission is enabled for their profile or a permission set. For details, refer to [Give Access to LWC on Field Service Mobile](#)



## Configure Panic Alert Confirmation Prompt

Use the Panic Alert Settings Custom Setting to control whether a confirmation message is displayed when a user taps the Panic Alert action in the Field Service mobile. This behaviour can be configured by organization, profile, or by user, depending on your organization's safety policies.

- When enabled, users are prompted to confirm before the Panic Alert is sent.
- When disabled, the Panic Alert is triggered immediately upon selection, without confirmation.

**NOTE:** A Custom Setting record must be created for the Panic Alert feature to function. Regardless of whether the confirmation dialog is enabled or disabled, a record is required to define the desired behavior for each user or profile.

To create a record and configure the confirmation prompt:

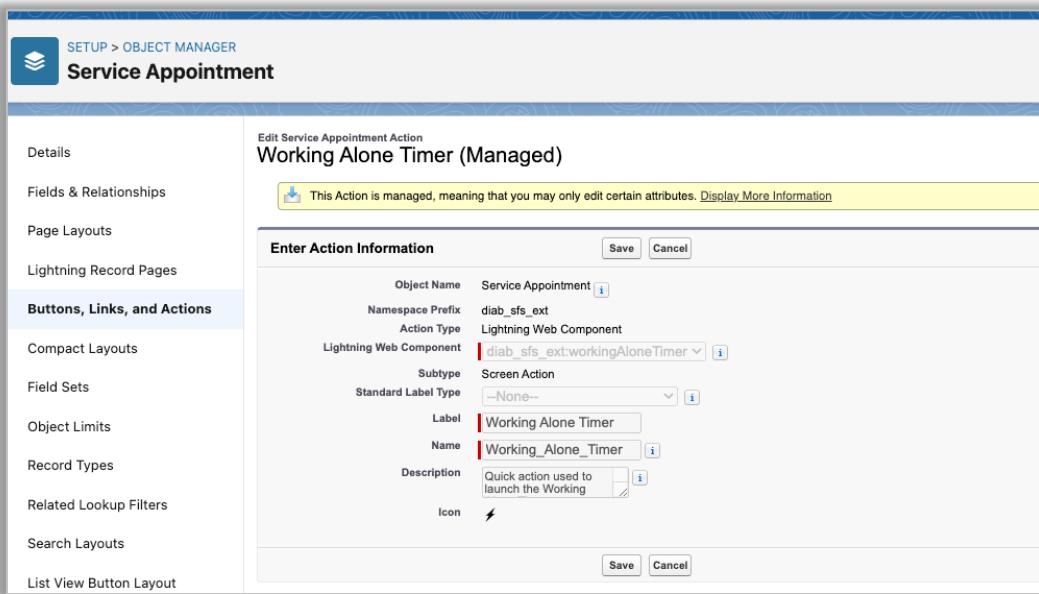
1. From Setup, enter custom settings in the quick find box, then select **Custom Settings**.
2. Click **Manage** next to Panic Alert Settings.
3. Click **New** to create a new configuration record.
4. In the Location field, select **Profile** or **User**.
5. Click the lookup icon to select the appropriate profile or user.

6. Check or uncheck the **Show Confirmation Box** checkbox based on your desired behaviour.
7. Click **Save**.

## Add Working Alone Timer Action to Service Appointment Page Layouts

To enable mobile technicians to access the **Working Alone Timer** feature, you must add the **Working Alone Timer** Lightning Web Component (LWC) action to the **Service Appointment** page layouts assigned to their user profiles.

This action makes the timer accessible from the *Actions* menu when technicians view a Service Appointment in the Field Service mobile app.



To add the action:

1. From Setup, click **Object Manager** and select **Service Appointment**.
2. Click **Page Layouts**, then select the layout assigned to your mobile technician profiles.
3. In the layout editor, click **Mobile & Lightning Actions** on the palette.
4. Locate the Working Alone Timer action and drag it into the Salesforce Mobile and Lightning Experience Actions section.



## 5. Click **Save**.

The screenshot shows the Salesforce Object Manager interface for the 'Service Appointment' object. The left sidebar lists various page layout categories. The 'Mobile & Lightning Actions' section is currently selected, which displays a grid of quick actions. These actions include 'Accept/Reject Work', 'Book Appointment', 'Change Record Type', 'Contact Support', 'Email', 'File', 'FSL Rule Analyzer', 'Log a Call', 'Cancel', 'Change Appointments...', 'Check for New Data', 'Delete', 'Email', 'Guest Community Case', 'Log a Call', 'Manage Slack Alerts', 'Change Owner', 'Clone', 'Edit', and 'Emergency'. Below this grid, there are two sections: 'Service Appointment Sample' and 'Highlights Panel'. The 'Highlights Panel' contains a placeholder message: 'Customize the highlights panel for this page layout...'. At the bottom, there are two rows of buttons labeled 'Quick Actions in the Salesforce Classic' and 'Actions'.

Once added, technicians will see the Working Alone Timer option in the Actions menu for applicable service appointments.

### IMPORTANT TO NOTE

If a user does not see the Working Alone Timer action in their Actions menu for Service Appointment, confirm that the [SDK for Field Service Mobile](#) system permission is enabled for their profile or a permission set. For details, refer to [Give Access to LWC on Field Service Mobile](#)

## Customize Duration and Reminder Notification Frequencies for the Working Alone Timer

You can customize your Working Alone Timer by:

- Adding duration options for your mobile users when starting the timer.
- Modifying the default settings for countdown frequency for each duration.

### *Add Duration Options for Working Alone Timer*

When setting the duration for a Working Alone Timer, mobile users can select from the following options:

- 5 Minutes
- 15 Minutes
- 30 Minutes
- 1 Hour

These options are provided with the package and cannot be deleted or modified, but you can add additional Duration options and modify the Countdown Frequency to customize the Working Alone Timer functionality to suit your organizations business processes.

To add additional duration options:

1. From Setup, in Quick Find box, type custom metadata types and click **Custom Metadata Types**.
2. In the All Custom Metadata Types list, click **Manage Records** next to Times and Frequencies Configurations.

Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size	Description
Manage Records	O2_Settings	FSL	FSL	Public	FSL__O2_Settings__mdt	406	
Manage Records	Times and Frequencies Configuration		diab_sfs_ext	Public	diab_sfs_ext__TimesandFrequenciesConfiguration__mdt	146	

3. From the Times and Frequencies record list, click **New**.



The screenshot shows a table with columns: Action, Label, Times and Frequencies Configuration Name, and Namespace Prefix. The 'Label' column contains entries like '1 Hour', '15 Minutes', '30 Minutes', and '6 Minutes'. The 'Times and Frequencies Configuration Name' column contains entries like 'X1\_Hour', 'X15\_Minutes', 'X30\_Minutes', and 'X6\_Minutes'. The 'Namespace Prefix' column contains 'diab\_sfs\_ext' repeated four times. A red box highlights the 'New' button in the top right corner of the table header.

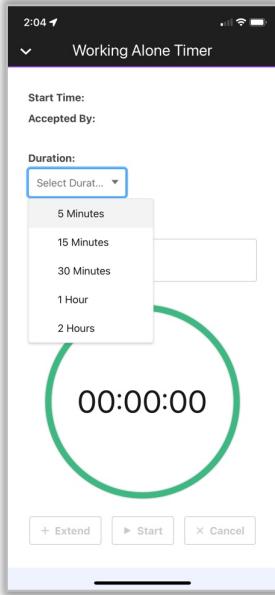
4. Enter details in the Times and Frequencies Configuration edit screen:

- Label** – the text entered will display in the Duration dropdown field in the Working Alone Timer. E.g., 45 Minutes, 1 hour and 30 minutes, 2 Hours
- Name** – a unique name used by the API and managed packages. The name must begin with a letter and use only alphanumeric characters and underscores. The name cannot end with an underscore or have two consecutive underscores. A default API Name is entered when you click out of the Label field.
- Time Value** – enter the numerical value for the duration. It must equal the duration in minutes, e.g., 45, 90, 120.
- Countdown Frequency** – enter the frequency for reminder notifications that will display to the dispatcher at the specified frequency as the timer is counting down.

**NOTE:** Entering 0 or empty means that no reminder notifications display for this duration.

The screenshot shows the 'Times and Frequencies Configuration Edit' screen. It has fields for Label ('2 Hours'), Times and Frequencies Configuration Name ('X2\_Hours'), Time Value ('120'), and Countdown Frequency ('30'). A red box highlights the 'Label' field.

Once a new Times and Frequencies Configuration record is created, mobile users will be able to see the new Duration option when launching the Working Alone Timer from their Field Service mobile app.



### *Understanding Reminder Notifications and Countdown Frequencies*

The Working Alone Timer feature provides automated reminder notifications to dispatchers as an active timer approaches expiration. These notifications help ensure timely responses and support technician safety during high-risk or isolated work.

You can customize how frequently these reminders are displayed using the Times and Frequencies Configuration custom metadata type.

#### How Countdown Frequency Works

For each duration option defined in the Times and Frequencies Configuration metadata, you can specify a corresponding Countdown Frequency value. This value controls how often reminder notifications are shown to dispatchers while the timer is active.

As the timer counts down and enters the next defined duration range, the frequency of reminders adjusts based on the Countdown Frequency value configured for that interval. This adaptive behaviour ensures that dispatcher notifications become more frequent as the timer nears expiration—allowing for proactive monitoring and intervention if needed.

#### Example: Default Countdown Frequency Settings

The Times and Frequencies Configuration custom metadata type is already configured with the Countdown Frequency settings shown in the image below.

Action	Label	Countdown Frequency	Time Value	Namespace Prefix
Edit	<a href="#">5 Minutes</a>	1	5	5_diab_sfs_ext
Edit	<a href="#">15 Minutes</a>	5	15	15_diab_sfs_ext
Edit	<a href="#">30 Minutes</a>	10	30	30_diab_sfs_ext
Edit	<a href="#">1 Hour</a>	20	60	60_diab_sfs_ext

If a technician sets their Working Alone Timer for 30 minutes and the corresponding Countdown Frequency value is set to 10, in this scenario, the dispatcher(s) will receive a reminder popup notification every 10 minutes during the timer countdown.

#### **As the timer progresses:**

- At 15 minutes remaining, notifications will switch to the frequency configured for the 15-minute interval. If that frequency is set to every 5 minutes, reminders will now appear at this interval.
- At 5 minutes remaining, notifications will again adjust to the frequency defined for the 5-minute timer. If set to every 1 minute, reminders will now appear every minute until the timer expires.

#### **Example: Modified Countdown Frequency**

The image below shows examples of modified countdown frequency values for each record, as well as a new custom record for 2 Hours.

Action	Label	Countdown Frequency	Time Value	Namespace Prefix
Edit	<a href="#">5 Minutes</a>	0	5	5_diab_sfs_ext
Edit	<a href="#">15 Minutes</a>	10	15	15_diab_sfs_ext
Edit	<a href="#">30 Minutes</a>	15	30	30_diab_sfs_ext
Edit	<a href="#">1 Hour</a>	30	60	60_diab_sfs_ext
Edit   Del	<a href="#">2 Hours</a>	45	120	120_diab_sfs_ext



Suppose a technician sets their Working Alone Timer for 2 hours and the corresponding Countdown Frequency value is set to 45. In this scenario, the dispatcher(s) will receive a reminder popup notification every 45 minutes during the timer countdown. In this case, the first reminder notification displays when the timer has 75 minutes remaining.

As the timer progresses:

- At 1 hour remaining, a reminder notification displays and notifications will switch to the frequency configured for the 1-hour timer. In this case, with the countdown frequency set to 30, reminders will now display at this interval, every 30 minutes.
- At 30 minutes remaining, notifications will again adjust to the countdown frequency defined for the 30-minute timer. In this example, set to 15, reminders will now display every 15 minutes.
- At 15 minutes remaining, notifications adjust to the frequency defined for the 15-minute timer. In this example, set to 10, reminders will display every 10 minutes (in this case, only once with 5 minutes remaining).
- At 5 minutes remaining, the final reminder displays (based on the 15-minute configuration), and since the 5-minute timer is configured with a countdown frequency of 0, no further reminder notifications will display.

**NOTE:** With this configuration, if a mobile user were to set a 5 Minute timer, then no reminder notifications will display. Only the initial alert notification that a working alone timer has started.

### Example: One Reminder Notification

The image below shows configuration for cases where you do not want frequent reminder notifications sent to dispatchers. Each duration record has the Countdown Frequency set to 0, except the 5-minute record, which has the Countdown Frequency set to 4.

With this configuration, once the timer reaches 5 minutes remaining, a reminder notification is set to display every 4 minutes, and in this case, will only display to the dispatcher(s) once, with 1-minute remaining in the timer.

Action	Label	Countdown Frequency	Time Value	Namespace Prefix
Edit	<a href="#">5 Minutes</a>	4	5	diab_sfs_ext
Edit	<a href="#">15 Minutes</a>	0	15	diab_sfs_ext
Edit	<a href="#">30 Minutes</a>	0	30	diab_sfs_ext
Edit	<a href="#">1 Hour</a>	0	60	diab_sfs_ext

## Customize Fields Using Field Sets

Field sets on the Alert object allow administrators to control which fields are displayed across various user interfaces related to Working Alone Timer and Panic Alerts. This includes pop-up notifications, the utility panel, alert details, and the mobile UI.

Admins can tailor each field set by adding, removing, or reordering fields to ensure only relevant data is shown. Fields will appear in the order listed in the field set. If a field has no value, it will not display in the UI. Only fields from the Alert object can be added to these field sets. Related object fields will not render in the interface.

**NOTE:** If a field included in the field set has no data, the field label and value will not appear in the alert display. Only fields with values will be shown.

### Alert Field Sets

Field Set Name	Purpose / Display Context	Feature
Alert Details	Fields shown in the <i>Alert Details</i> (View button) from a Working Alone Timer alert in the utility panel	Working Alone Timer
Alert Mobile UI Fields	Fields shown in the Working Alone Timer component on the mobile app	Working Alone Timer
Alerts – Pop-Up Notifications	Fields shown in pop-up notifications for Working Alone Timer events (start, reminders, expired)	Working Alone Timer
Utility Panel Alerts	Fields visible in the utility panel list before opening full alert details (Working Alone Timer)	Working Alone Timer
Panic Alert Details	Fields shown in the <i>Alert Details</i> window from a Panic Alert (View button)	Panic Alert
Panic Alert Mobile UI Fields	Fields shown to mobile users in the Panic Alert interface	Panic Alert
Panic Alerts – Pop-Up Notifications	Fields displayed in pop-up notifications for Panic Alerts	Panic Alert



Field Set Name	Purpose / Display Context	Feature
Utility Panel Panic Alerts	Fields visible in the utility panel list before opening full alert details (Panic Alerts)	Panic Alert

To configure a field set:

1. From Setup, click **Object Manager**, and click **Alert** object.
2. Click **Field Sets**.
3. Select the desired field set from the list.
4. Drag fields into or out of the **In the Field Set** area.
5. Click **Save** to apply changes.

Fields will be displayed in the UI component in the order listed in the field set.

#### Create and Assign a Custom Field Set for a Specific Profile

By default, the provided Alert field sets apply to all users. If different fields need to be displayed based on a user's profile, you can create a new field set and assign it to the appropriate profile using the provided Custom Metadata Type. This allows you to tailor the alert display experience (e.g., Working Alone Timer) for specific user groups, such as technicians.

**NOTE:** If a profile is not explicitly assigned a custom field set, the default field set will be used.

#### Step 1: Create a New Field Set on the Alert Object

1. From the Alert object, click **Field Sets**.
2. From the Field Sets list page, click **New**.



3. Enter the **Field Set Label** and **Field Set Name** (e.g., WAT Fields for Techs) and provide a short description.

**Field Set Edit**

**Enter Field Set information**

Field Set Label	<input type="text" value="WAT Fields for Techs"/>
Field Set Name	<input type="text" value="WAT_Fields_for_Techs"/>
Namespace Prefix	
Where is this used?	Fields to display on the working alone timer for Technician profile.

Save Cancel

4. Click **Save**.
5. In the Field Set editor, drag the desired fields from the palette into the **In the Field Set** area and then click **Save**.

**WAT Fields for Techs**

**Field Set Properties**

**Alert**

- Accepted By
- Completed By
- Created By ID
- Last Modified By ID
- Owner ID
- Resource
- Service Appointment

Quick Find: Alert Name

Accepted By	Alert Name
Accepted Time	Alert No
Alert Location (L...)	Comments
Alert Location (L...)	Completed By

Drag any of the fields above into the list below.

**In the Field Set**

- Accepted By
- Accepted Time

## Step 2: Map the Field Set to a Profile Using Custom Metadata Type.

1. From Setup, enter Custom Metadata Type in the Quick Find Box, and select **Custom Metadata Type**.
2. Click **Manage Records** next to Working Alone Timer Settings.
3. To assign a new field set:



- a. Click **New** to create a new record, or
  - b. Edit an existing record if one already exists for the profile.
4. Enter the following:
- a. **Label and API Name.**
  - b. **Field Set Name** = API name of the new field set you created.
  - c. **Profile Name** = Exact name of the profile that should use the custom field set.
5. Click **Save**.

**NOTE:** For any profile that is not specified to use a Field Set, the default field set is used.



## Configure a Flow to Launch After Working Alone Timer is Completed

In cases where your business processes require additional actions once a technician has completed their working alone timer, you can configure a flow to launch once the technician has completed their working alone timer. The ability to configure different flows for different technician profiles is also supported.

NOTE: Before you create an app extension, make sure that you have already created your Field Service Mobile flow and have modified

When configuring a flow that automatically launches when a Working Alone Timer is completed, you must add an Assignment and Update Record element before the end of the custom flow. This will ensure that the Alert record is updated with the correct values.

1. From Setup, enter Flows in the Quick Find box and then click **Flows**.
2. From the flow list, click your custom flow to open and edit.

This is the flow that will be launched upon timer completion by technicians.

3. Click the toolbox icon to display the Toolbox.
4. Create a text variable to store the alert record id.
5. Click **New Resource**. The New Resource window opens.
6. For Resource Type, select **Variable**.
7. Enter alertRecordId for the API Name.  
The API Name must be entered exactly as shown.
8. Enter details in the Description field.



**9. For Data Type, select **Text**.**

The screenshot shows the 'New Resource' dialog box. The 'Resource Type' is set to 'Variable'. The 'API Name' is 'alertRecordId'. The 'Data Type' is set to 'Text', with the 'Allow multiple values (collection)' checkbox unchecked. The 'Default Value' field contains 'Enter value or search resources...'. Under 'Availability Outside the Flow', both 'Available for input' and 'Available for output' are checked. At the bottom right are 'Cancel' and 'Done' buttons.

**10. Click **Done**.**

**11. Create another variable to store the alert record details:**

- Click New Resource.
- For Resource Type, select Variable.
- Enter API Name, AlertRecord.
- For Data Type, select Record.
- For Object, select Alert.

The screenshot shows the 'New Resource' dialog box. The 'Resource Type' is set to 'Variable'. The 'API Name' is 'AlertRecord'. The 'Data Type' is set to 'Record', with the 'Allow multiple values (collection)' checkbox unchecked. The 'Object' is set to 'Alert'. Under 'Availability Outside the Flow', both 'Available for input' and 'Available for output' are checked. At the bottom right are 'Cancel' and 'Done' buttons.

- f. Click **Done**.
12. Create a formula variable to store the current user:
- Click **New Resource**.
  - For Resource Type, select **Formula**.
  - Enter an API Name, e.g. CurrentUser.
  - For Data Type, select **Text**.
  - Click Insert a resource... field, scroll to Global Variables, and select **\$User > Id**. The **{!\$User.Id}** formula displays in the formula builder.

**New Resource**

\* Resource Type  
Formula

\* API Name  
CurrentUser

Description

\* Data Type  
Text

\* Formula

Insert a resource... All Functions Insert a function... Select an Operator...

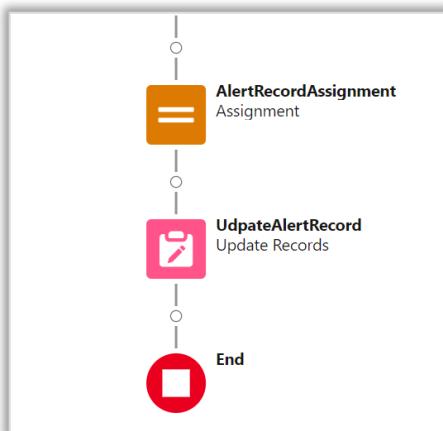
{!\$User.Id}

Check Syntax

Cancel Done

- f. Click **Done**.

Next, before the end of the flow, add and configure an Assignment element. This element is necessary to assign specific values to the Alert fields.



1. On the flow canvas, on the path before the End element, click the **Add Element** icon.
2. Scroll to the Logic section and click **Assignment** element.
3. In the New Assignment window, enter a Label, API Name, and Description.
4. Click **Add Assignment** and add three rows.
5. Set variable values as shown below.

**Set Variable Values**

Each variable is modified by the operator and value combination.

Variable	Operator	Value
A <sub>a</sub> AlertRecord > Record ID	Equals	A <sub>a</sub> alertRecordId
AlertRecord > Status	Equals	Completed
AlertRecord > Completed Time	Equals	Current Date/Time
A <sub>a</sub> AlertRecord > Completed By	Equals	A <sub>a</sub> CurrentUser

**+ Add Assignment**

Next, add an Update Records element as shown in image below.

1. On the flow canvas, on the path before the End element, after the Assignment element, click the Add Element icon.
2. Scroll to the Data section and click the **Update Records** element.
3. In the New Update Records window, enter a Label, API Name, and Description.
4. For “How to Find Records to Update and Set Their Values”: **Use the IDs and all field values from a record or record collection.**



5. Record or Record Collection: Find and select AlertRecord.  
This is the record variable created in step 5.

The screenshot shows the configuration for a 'New Update Records' step. It includes fields for 'Label' (Update Alert Record) and 'API Name' (Update\_Alert\_Record). A 'Description' section is present but empty. Below these, under 'How to Find Records to Update and Set Their Values', the option 'Use the IDs and all field values from a record or record collection' is selected. In the 'Select Record(s) to Update' section, 'Record or Record Collection' is chosen, with 'AlertRecord' selected. A note at the bottom states: 'Make sure that each record has an ID. Otherwise the flow can't find the records to update, and it fails.' with an information icon.

Now that your custom flow is modified with the assignment and update record elements, you are ready to configure the flow to launch from the Working Alone Timer on the Field Service mobile app.

First, set up an app extension that connects the flow to the Field Service Mobile App.

1. From Setup, enter Field Service Mobile Settings in the Quick Find box and select **Field Service Mobile Settings**.
2. Click **Show Details** next to the mobile settings configuration that you want to add the flow to.
3. Scroll down to App Extensions section and click **New**.



4. In the New App Extension window, fill in the following details:

Information	
* Field Service Mobile Settings	* Label
Field Service Mobile Settings	After Timer is Completed
* Type	* Name
Flow	TimerCompleteFlow
* Launch Value	Scoped To Object Types
TimerCompleteFlow	ServiceAppointment
Installation URL	
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

- Enter a Label for your app extension. This label is what your users see in the user interface on mobile, in the Actions menu.
- Select **Flow** for Type.
- Enter a Name that expresses the purpose of the flow.
- Enter ServiceAppointment for Scoped to Object Types.  
NOTE: This is the API name for the Service Appointment object and must be entered exactly.
- For Launch Value, enter the unique name of your flow.

5. Click **Save**.

**IMPORTANT TO NOTE**

Only the user profiles assigned to the mobile settings configuration you select have access to the flow. To manage user profile assignments, click Manage Assignments on the Field Service Mobile Settings page.

Once the Field Service Mobile flow is connected as an app extension, you must now create a Custom Metadata Type record in the provided *Working Along Timer Settings* Custom Metadata Type. This record will store the configuration information for the flow and profile and will be used by the Working Alone Timer component when the technician completes the timer.



1. From Setup, enter Custom Metadata Type in the Quick Find Box, and select **Custom Metadata Type**.
2. Click **Manage Records** next to Working Alone Timer Settings.
3. From the record list view, click **New**.
4. Enter a record Label and API Name.
5. In the Flow Name field, enter the flow Name that you entered in the app extension configuration. Shown as *TimerCompleteFlow* in the example above.

6. Leave Field Set Name empty if all profiles should access the same fields on the Working Alone Timer. The provided Field Set can be configured for all profiles as the default.

If you need to configure different fields to display on the Working Alone Timer for this profile, create a new Field Set and then update this Custom Metadata Type record with the new Field Set Name. Refer to [Field Set: Alert Mobile UI Fields](#) in this document.

7. In the Profile Name field, enter the name of the profile of the technicians that you want the flow to launch for upon completing their Working Alone Timer.

#### IMPORTANT TO NOTE

In cases where your organization uses multiple profiles for technician users, and every user accesses the same flow, you must create a new Custom Metadata Type record for each profile. Configure each record with the same flow name, and a unique profile name. In cases where your business processes require different flows to launch for different technician users once a technician has completed their working alone timer, you must also create a new Custom Metadata Type record for each flow and profile combination.



## Considerations and Limitations

- Dispatchers will only receive alerts for technicians who are members of their Service Territory.  
If a dispatcher is not receiving alerts as expected, ensure that a Service Resource is created for the dispatcher and that they are a member of the same Service Territory as the technician starting the working alone timer.
- Mobile technician users must have the SDK for Field Service Mobile system permission enabled to see the Working Alone Timer and Panic Alert actions.  
If a user does not see the Working Alone Timer or Panic Alert action in their Actions menu, confirm that the SDK for Field Service Mobile system permission is enabled for their profile or a permission set.



## Mobile Layout

The Mobile Layout feature enhances the Field Service mobile app experience by providing a tab-based view of Service Appointment details. Designed to streamline technician workflows, it reduces scroll, organizes information by tab, and uses existing page layout configurations — making it easier for field technicians to view and update relevant data.

### Key Features

- **Tab-Based Mobile View**

Automatically displays each section from the assigned Service Appointment page layout as a separate tab in the mobile app. Field order and grouping mirror the desktop layout for a consistent experience.

- **Admin-Configured Access**

Uses existing page layout assignments to determine field visibility, required fields, and read-only access. Changes to the layout are automatically reflected in the Mobile Layout interface.

- **Streamlined Navigation**

Once the Mobile Layout action is added to a Service Appointment page layout, users can access it via the Actions menu in the Field Service mobile app.

- **Real-Time Updates**

Technicians can modify fields (based on access and layout configurations), and changes are synced with Salesforce in real time.

### Metadata

#### Quick Action: Service Appointment Object

**Mobile Layout** – this action uses the mobileTabs Lightning Web Component and launches the Mobile Layout UI from a Service Appointment on the Field Service mobile app. This LWC action must be added to the Service Appointment page layouts used by mobile users.



## Configuration

If the Mobile Layout feature is enabled for your org, you must complete the following configuration tasks.

- [Enable Permission for Technicians](#)  
To display Lightning Web Components in the Field Service mobile app, mobile users must have the Lightning SDK for Field Service Mobile system permission.
- [Customize Page Layout for Mobile Users](#)  
Mobile Layout behaviour is driven by the assigned Service Appointment page layout. Review and update the layout used by mobile users.
- [Add Mobile Layout Action to Service Appointment Page Layouts](#)  
Add the Mobile Layout quick action to the Service Appointment page layouts used by mobile users to make the feature accessible in the mobile app.
- [Configure Mobile Layout for Work Order \(Optional\)](#)  
If your organization uses Work Orders or other supported objects in the Field Service mobile app, you can configure Mobile Layout for those objects.

### Enable Access to LWC on Field Service Mobile

The **Lightning SDK for Field Service Mobile** system permission must be enabled for your Field Service mobile users to have LWC quick actions display in the Field Service mobile app.

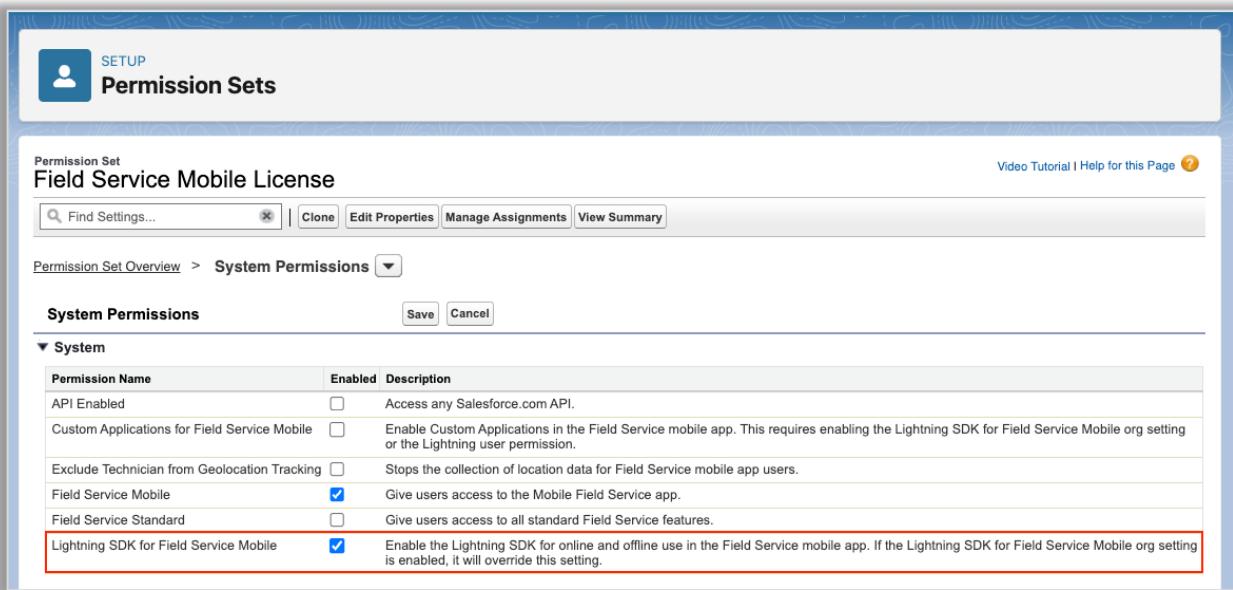
To grant access to this system permission:

1. From Setup, enter Permission Sets in the Quick Find box and select **Permission Sets**.
2. Select an existing permission set that is assigned to your Field Service mobile users or create a new permission set.

NOTE: The standard FSL permission set, **Field Service Mobile License** can be modified to enable this system permission.

3. Click **System Permissions**, and then click **Edit**.

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



5. If you created a new permission set, click **Manage Assignments**, and assign this permission set to technician users. If you edited an existing permission set such as the Field Service Mobile License, then your Field Service mobile users will already have the permission applied.

#### IMPORTANT TO NOTE

If the **Lightning SDK for Field Service Mobile** permission is not enabled for a user, then the Mobile Layout action will not be available in the Actions menu on the Field Service mobile app for the user, even if the component is configured on the Service Appointment page layout and assigned to them.

#### Customize Page Layouts for Technicians

Mobile Layout leverages page layouts to control how tabs, their sequence, and corresponding fields display in the Mobile Layout user interface.

As soon as the Mobile Layout action is added to the assigned page layout, when launched, the Mobile Layout UI will match what is already configured on the page layout, no additional configuration is required. At any time, you can make changes to design the assigned page layout with your mobile users in mind.

**NOTE:** Any changes to the assigned page layout will take time to sync with the mobile layout component on the Field Service mobile app. Mobile users will need to log out and back into the app to see the changes.



The following images show a page layout configured with sections for: “General Information”, “Address”, “Scheduled Times”, and “Actual Times”, and the resulting Mobile Layout view that matches with corresponding tabs based on the page layout sections, and field arrangement.

<b>General Information</b>	Appointment Number GEN-2004-001234 ★ ● Parent Record Sample Text 🔒 Parent Record Type Sample Text Subject Sample Text Description Sample Text Tech Comments Sample Text	Service Territory Sample Text ★ ● Status Sample Text 🔒 Status Category Sample Text 🔒 Account Sample Text Contact Sample Text Test Field Sample Text
<b>Address</b>	Address Suite 300, The Landmark @ One Market San Francisco CA 94105 US	
<b>Time Constraints</b>	Earliest Start Permitted 2023-11-30, 10:21 a.m. Due Date 2023-11-30, 10:21 a.m.	Arrival Window Start 2023-11-30, 10:21 a.m. Arrival Window End 2023-11-30, 10:21 a.m.
<b>Scheduled Times</b>	Scheduled Start 2023-11-30, 10:21 a.m. Scheduled End 2023-11-30, 10:21 a.m.	Duration 339.41 Duration Type Sample Text
<b>Actual Times</b>		

11:58

X Mobile Layout

Service Appointment Details

General Information Address More ▾

- Appointment Number SA-0107
- Scheduled Times
- Actual Times
- Status

Parent Record ID 00000071 Completed

Parent Record Type WorkOrder Status Category Completed

Subject Vendor

Description Contact ID

Tech Comments Test Field

Tech comments

### IMPORTANT TO NOTE

Field Level Security settings and field properties set on assigned page layouts are respected. If a user’s profile is configured to not see certain fields or read-only or able to edit, then the user has the same security level when accessing Mobile Layout. If their page layout is used to further restrict a visible field to read-only or make the field required, the field settings for the user is respected when accessing Mobile Layout.

**NOTE:** All Lookup fields are read-only in the mobile layout view, even if the field properties are editable for the user. This is due to a known limitation with Lightning Web Component capabilities on Field Service mobile app.

## Add Mobile Layout Action to Service Appointment Layouts

Once you have the desired design of the Service Appointment page layout for your mobile users, you can now make the Mobile Layout user interface available to your mobile users.

The **Mobile Layout** action (type: LWC) is provided with the SFS-X package for the Service Appointment object. This action must be added to the Service Appointment page layouts and assigned to the profiles used by your technician mobile users so they can access the action from the Field Service mobile app.

The screenshot shows the 'Edit Service Appointment Action' dialog for a 'Mobile Layout (Managed)' action. The dialog has a yellow header bar with a warning message: 'This Action is managed, meaning that you may only edit certain attributes. [Display More Information](#)'. Below this is a section titled 'Enter Action Information' with two buttons: 'Save' and 'Cancel'. The form fields are as follows:

Object Name	Service Appointment
Namespace Prefix	diab_sfs_ext
Action Type	Lightning Web Component
Lightning Web Component	diab_sfs_ext:mobileTabs
Subtype	Screen Action
Standard Label Type	—None—
Label	Mobile Layout
Name	MobileLayout
Description	This action is added to Field Service mobile
Icon	

At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

1. From Setup, click **Object Manager** and select Service Appointment.
2. Click Page Layouts.
3. From the page layouts list, click the page layout used by your mobile technicians on the Field Service mobile app.
4. From within the page layout, click **Mobile & Lightning Actions** on the palette.
5. Locate the Mobile Layout action in the palette and drag to the Salesforce Mobile and Lightning Experience Actions section.
6. Click **Save**.



**Service Appointment**

This Service Appointment is managed, meaning that you may only edit certain attributes. [Display More Information](#)

**FSL Service Appointment Layout**

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Blank Space
- Account
- Address
- Actual Duration (...
- Appointment Book...
- Arrival Window End
- Bundle
- Bundle Member
- Created Date
- Duration
- Duration Type
- Earliest Start Pe...
- Emergency
- Gantt Color
- In Jeopardy
- Gantt Label
- Is Fill In Candidate
- Is MultiDay
- Gantt Display Date
- In Jeopardy Reason
- Last Modified By
- Gantt Icon
- Internal SLR Geol...
- Last Modified Date

**Service Appointment Sample**

**Highlights Panel**

Customize the highlights panel for this page layout...

**Quick Actions in the Salesforce Classic Publisher**

Post File Book Appointment Candidates Emergency Change Status New Task New Note

**Salesforce Mobile and Lightning Experience Actions**

Mobile Layout Working Alone Timer Update Status Edit Post Change Status File New Task

**Service Appointment Detail**

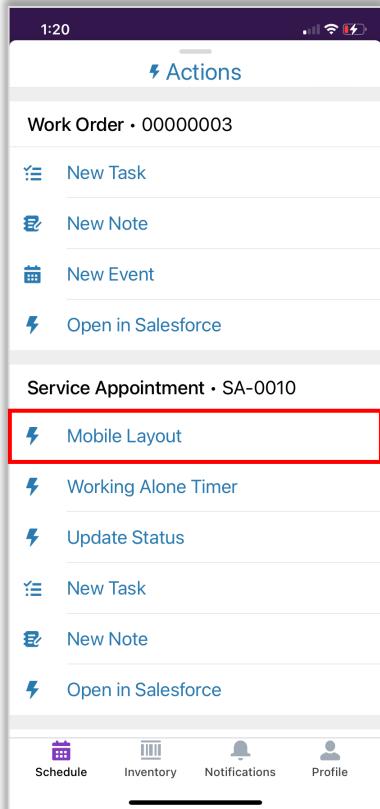
Standard Buttons

Edit Delete Clone Change Owner Change Record Type Printable View Sharing Check for New Data Create Service Report Cancel Service Appointment



Once this action is added to the Service Appointment page layouts, your mobile users who are assigned the corresponding page layouts, will then be able to launch Mobile Layout from the Actions menu within a Service Appointment on their Field Service mobile app.

**NOTE:** Mobile users will need to log out and back into the Field Service mobile app to see the changes.



#### IMPORTANT TO NOTE

If a user does not see the Mobile Layout action, confirm that the [SDK for Field Service Mobile](#) system permission is enabled for their profile or a permission set. For details, refer to [Give Access to LWC on Field Service Mobile](#)



## Configure Mobile Layout Action for Work Order (Optional)

With the SFS-X package installation, the Lightning Web Component action is already created for the Service Appointment object. You can manually create an action with the provided lightning web component for the following objects:

- Work Order
- Product Item
- Product Request
- Product Transfer

For your mobile users to be able to launch the mobile layout user interface, you must first create a new action for the corresponding object.

1. From Setup, click **Object Manager**.
2. Select the object to create an action for. For this example, click **Work Order**.
3. Click Buttons, Links, and Actions.
4. Click New Action.
5. Select **Lightning Web Component** as Action Type.
6. In Lightning Web Component drop-down, select **diab\_sfs\_ext:mobileTabs**.
7. Enter a Label for the action.  
NOTE: This label will display in the Actions menu for mobile users in the Field Service mobile app.
8. Press tab to autofill Name.
9. Optionally, enter a Description and change icon and then click **Save**.



The screenshot shows the 'Work Order Actions' section in the 'Object Manager' of the Salesforce Setup. A new action is being created for the 'Work Order' object. The configuration includes:

- Action Type:** Lightning Web Component
- Subtype:** diab\_sfs\_ext:mobileTabs
- Standard Label Type:** --None--
- Label:** Mobile Layout
- Name:** Mobile\_Layout
- Description:** (empty)
- Icon:** Change Icon (lightning bolt icon)

Once the action is created, you must then add the action to the Work Order page layouts used by your mobile technician users.

1. From Setup, click **Object Manager** and select **Work Order**.
2. Click **Page Layouts**.
3. From the page layouts list, click the page layout used by your mobile technician users on the Field Service mobile app.
4. From within the page layout, click **Mobile & Lightning Actions** on the palette.
5. Locate the **Mobile Layout** action (or whatever label you configured) in the palette and drag to the Salesforce Mobile and Lightning Experience Actions section.
6. Click **Save**.

All mobile users that are assigned the page layout with the configured action will now be able to launch the Mobile Layout view from Work Order list in the Field Service mobile app.

Repeat this procedure for any other supported objects (Product Item, Product Transfer, Product Request), where you would like to use the Mobile Layout feature.



## Considerations and Limitations

- All Lookup fields are read-only in the mobile layout view, even if the field properties are editable for the user. This is due to current limitations with Lightning Web Components in Field Service capabilities.
- Mobile Layout view can only be configured for the following objects:
  - Service Appointment
  - Work Order
  - Product Item
  - Product Request
  - Product Transfer
- Mobile technician users must have the SDK for Field Service Mobile system permission enabled to see the Working Alone Timer and Panic Alert actions.

If a user does not see the Working Alone Timer or Panic Alert action in their Actions menu, confirm that the SDK for Field Service Mobile system permission is enabled for their profile or a permission set.

- Mobile Layout view can be accessed while offline. Any changes to data will synchronize automatically once device is back online.



## Dynamic Status Transitions

The Dynamic Status Transitions feature simplifies how technicians update Service Appointment statuses updates by displaying only the next valid status transition options based on your organization's configured status transition rules.

Each time a technician launches the status update action, they are presented with only the valid next statuses according to the configured status transitions. The interface dynamically reflects updates to status values and transitions, eliminating the need for custom Flows or manual configuration.

### Key Features

- **Update Status Action**

Provides a clean, guided interface that displays only valid next statuses based on the current appointment status and your organization's configured transitions. This ensures technicians follow the correct lifecycle steps and helps prevent errors or skipped statuses.

- **Automatic Updates**

The interface automatically updates when:

- New status values are added or removed from the Status field
- Status transition configurations are changed in Field Service Admin Settings - no Flow configuration is required—reducing admin effort and ongoing maintenance.

## Configuration

Once the SFS-X package is installed and the Dynamic Status Transitions feature is enabled, the following configuration procedures must be completed.

- [Assign Permission Sets](#)

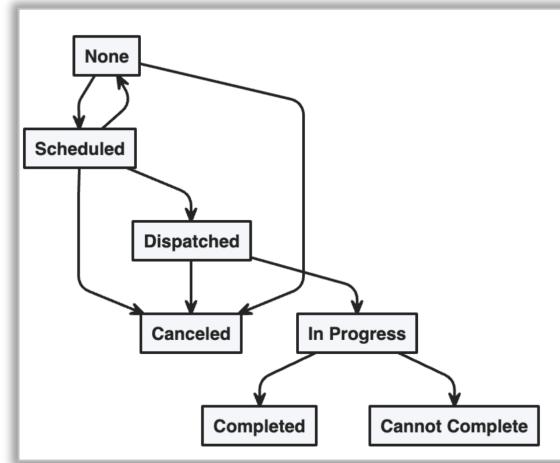
Assign the relevant SFS-X permission sets to your mobile technician users to ensure they can access and use the Dynamic Status Transitions interface.

- [Add Update Status action](#)

Add the Update Status quick action to the Service Appointment page layouts used by your mobile technicians. This action is required to launch the Dynamic Status Transitions interface from the Actions menu in the Field Service mobile app.

The screenshot shows the 'Service Appointment Life Cycle' configuration screen. It has tabs for 'CREATION', 'SA STATUS', and 'STATUS TRANSITIONS'. The 'STATUS TRANSITIONS' tab is selected. Below it, there's a section titled 'Service Appointment Status Transitions' with a table of transition rules:

FROM	TO	ALLOWED PROFILES
None	Scheduled	All profiles allowed
None	Canceled	All profiles allowed
Scheduled	Canceled	All profiles allowed
Dispatched	Canceled	All profiles allowed
Dispatched	In Progress	All profiles allowed
In Progress	Completed	All profiles allowed
Scheduled	None	All profiles allowed
In Progress	Cannot Complete	All profiles allowed
Scheduled	Dispatched	All profiles allowed



The interface respects your organization's configured Status field picklist values, customizations to the Service Appointment lifecycle, and any disallowed transitions defined in the Service Appointment Status Transitions.



## Assign Permission Sets to Technicians

The SFS-X package includes the Diab – Dynamic Status Transitions for Field Service Mobile App Users permission set that must be assigned to mobile technician users who will be using Mobile Layout from the Field Service mobile app.

The table below provides a summary for Diab – Dynamic Status Transitions for Field Service Mobile App Users permission set.

Permission Set Category	Description
Apex Class Access	Includes permission to execute the following Apex Classes: <ul style="list-style-type: none"><li>diab_sfs_ext.SAStatusChangeController</li></ul>

## *Enable Access to LWC on Field Service Mobile*

The **Lightning SDK for Field Service Mobile** system permission must be enabled for your Field Service Mobile users to have LWC actions display in the Field Service mobile app.

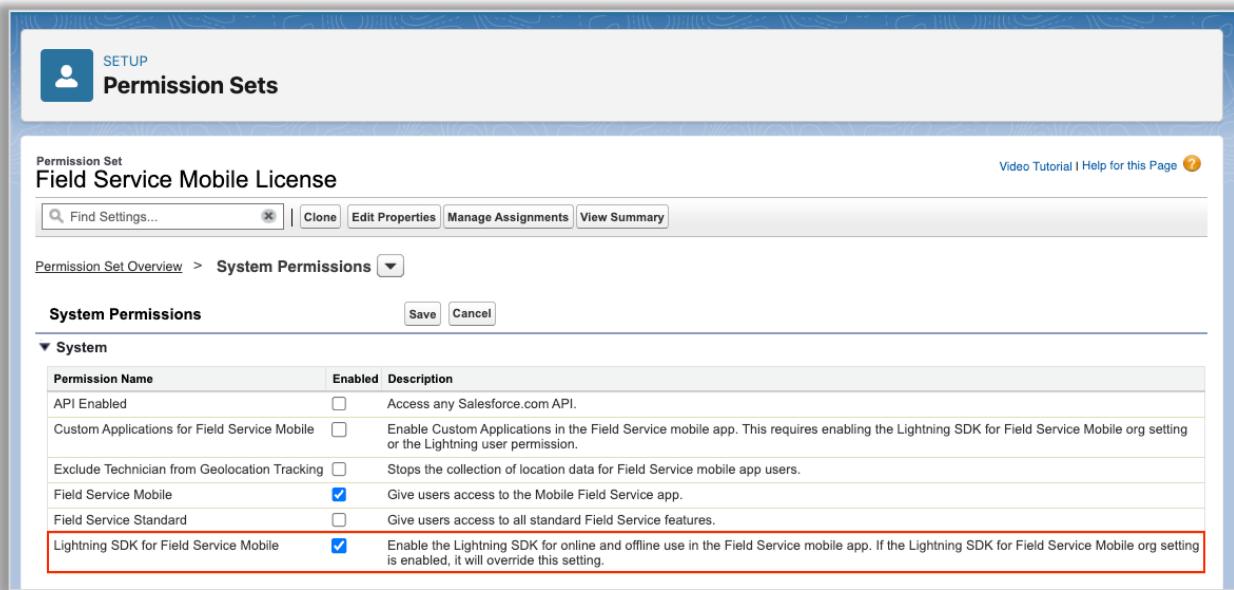
To grant access to this system permission:

1. From Setup, enter Permission Sets in the Quick Find box and select **Permission Sets**.
2. Select an existing permission set that is assigned to your Field Service mobile users or create a new permission set.

NOTE: The standard FSL permission set, Field Service Mobile License or any other existing permission set assigned to your Field Service mobile app users can be modified.

3. Click **System Permissions**, and then click **Edit**.

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



5. If you created a new permission set, click **Manage Assignments**, and assign this permission set to Field Service mobile app users. If you edited an existing permission set such as the Field Service Mobile License, then your Field Service mobile users will have the permission applied through the existing permission set assignment.

#### IMPORTANT TO NOTE

If the **Lightning SDK for Field Service Mobile** permission is not enabled for a user, then the Update Status action will not be available in the Actions menu on the Field Service mobile app for the user, even if the component is added to the Service Appointment page layout and assigned to them.



## Add Update Status Action to Service Appointment Page Layouts

The **Update Status** action (type: LWC) must be added to Service Appointment page layouts and assigned to the profiles used by your mobile users. With this configuration, users will then have access to the Update Status Lighting Web Component from the Actions menu when on a service appointment.

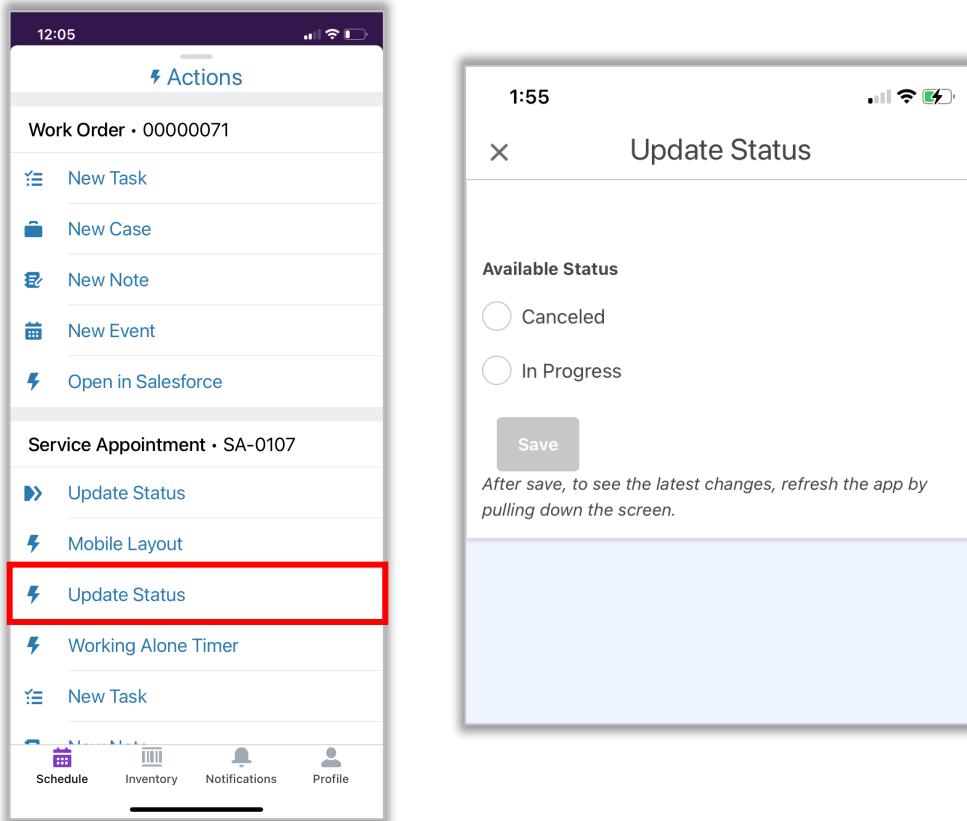
1. From Setup, click **Object Manager** and select **Service Appointment**.
2. Click Page Layouts.
3. From the page layouts list, click the page layout used by your mobile technicians on the Field Service mobile app.
4. From within the page layout, click **Mobile & Lightning Actions** on the palette.
5. Locate the Update Status action in the palette and drag to the **Salesforce Mobile and Lightning Experience Actions** section.
6. Click **Save**.

The screenshot shows the Salesforce Object Manager interface for the 'Service Appointment' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Page Layouts' section is selected. The main area shows the 'FSL Service Appointment Layout'. A palette on the right, titled 'Mobile & Lightning Actions', contains several actions. One action, 'Update Status', is highlighted with a red border and is being moved over the 'Salesforce Mobile and Lightning Experience Actions' section, which is indicated by a blue background. The status bar at the bottom of the palette shows 'Mobile Layout Working Alone Timer Update Status Edit Post Change Status File New Task'.



Once this action is added to the Service Appointment page layouts, your mobile users who are assigned the corresponding page layouts, will then be able to launch Update Status from the Actions menu within a Service Appointment on their Field Service mobile app.

**NOTE:** Mobile users will need to log out and back into the Field Service mobile app to see the changes.



## Considerations and Limitations

- The Update Status action is currently not supported offline.



## Mass Recurring Non-Availabilities

The Mass Recurring Non-Availabilities feature is designed to improve dispatcher efficiency by simplifying how service resource schedules are managed. This tool allows dispatchers to create or delete recurring absences for multiple service resources at once using a single, intuitive user interface.

### Key Features

#### Mass Creation of Recurring Non-Availabilities

Dispatchers can create recurring absences for multiple service resources simultaneously. The user interface provides the ability to:

- Select and filter Service Resources by Service Territory
- Define start and end times
- Choose an absence type (e.g., Meeting, Vacation, Training, Medical, or any custom value)
- Set recurrence patterns (Daily, Weekly, Monthly, Yearly)
- Specify a recurrence range (e.g., start and end date of the pattern)

This reduces the time and manual effort required to apply recurring absences across a team of technicians.

#### Mass Deletion of Resource Absences

Dispatchers can delete multiple Resource Absence records at once, offering greater control over schedule maintenance. Using the Mass Recurring Non-Availabilities utility, dispatchers can:

- Define criteria to retrieve absence records based on:
  - Service Territory
  - Absence Type
  - Date Range
- View a list of matching absence records
- Select or deselect records for deletion, allowing precise control over which records are removed

This capability streamlines schedule adjustments and simplifies the management of large teams and changing availability.



## Metadata

### Custom Object: Recurring Resource Absence

The Recurring Resource Absence custom object serves as a parent record that stores all related Resource Absence records created as part of the series.

Field Label	API Name	Data Type	Description
Recurring Resource Absence Name	Name	Auto Number	Format: RRA{0000}
Type	Type__c	Text(30)	This field stores the absence type that was selected when a mass recurring non-availability was created.

### Custom Fields: Resource Absence Standard Object

Field Label	API Name	Data Type	Description
Recurring Resource Absence	Recurring_Resource_Absence__c	Lookup(Recurring Resource Absence)	Automatically populated with the corresponding Recurring Resource Absence record for each Resource Absence record created in the series.

## Custom Settings

**Mass Recurring NA Settings** is a custom setting included with the SFS-X managed package. It controls the maximum number of Resource Absence records that can be created in a single transaction per Service Resource.

- Upon initial deployment, the Max Resource Absence Records Allowed field is null.
- When this field is null, the system defaults to a limit of 100 Resource Absence records per Service Resource to prevent excessive record creation.
- Admins can configure this setting to increase or decrease the maximum number of allowable records per resource, up to a hard limit of 999.

This setting helps organizations manage system load and avoid unintentionally creating large volumes of data during mass operations.



## Configuration

Once the SFS-X package is installed and the Mass Recurring Non-Availability feature is enabled, complete the following configuration tasks to activate and use the feature.

- [Assign Permission Sets](#)  
Assign feature permission sets to dispatchers or schedulers who need the ability to mass create and delete resource absences using the utility.
- [Add custom utility item to Field Service lightning app.](#)  
If you're using a custom Field Service Lightning app, add the Mass Recurring Non-Availability custom utility item. This provides users access to the UI for creating and deleting recurring absences.
- [Customize Absences related list on Service Resource page layouts](#)  
Update the Service Resource page layouts to include and configure the Absences related list. This allows users to view detailed information about recurring absences directly from the Service Resource record.
- [Customize Resource Absence page layout](#)  
Add the Recurring Resource Absence field to the Resource Absence page layout to display the parent recurring pattern for each absence, improving traceability.
- [Configure Resource Absence Related List on Recurring Resource Absence page layout](#)  
Add and configure the Resource Absence related list to the Recurring Resource Absence page layout. This helps users quickly view and access all absences generated by the recurring pattern.
- [Add Delete Action to Resource Absence Related List](#)  
Add the Delete quick action to the Resource Absence related list to enable users to mass delete selected absence records from the recurring group.
- [Configure the Resource Absence Lightbox field set](#)  
Add the Recurring Resource Absence field to the Resource Absence Lightbox field set. This ensures that users can access recurrence details when viewing absences from the Gantt view.
- [Configure maximum Resource Absence records](#)  
Use the Mass Recurring NA Settings custom setting to define the maximum number of Resource Absence records that can be created per Service Resource in a single transaction (up to 999).



## Assign Permission Sets to Dispatcher Users

The SFS-X package includes the following permission sets that must be assigned to dispatcher or scheduler users who will be mass creating resource absences.

- Diab – Recurring Resource Absence Access
- Diab – Recurring Resource Absence Delete

The table below summarizes the **Diab – Recurring Resource Absence Access** permission set.

Permission Set Category	Description
Object Settings for Recurring Resource Absence	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>• Available and Visible</li> </ul> <p>Object permissions:</p> <ul style="list-style-type: none"> <li>• Read, Create, Edit, View All</li> </ul> <p>Field permissions: custom field:</p> <ul style="list-style-type: none"> <li>• Edit access on Type__c</li> </ul>
Object Settings for User Settings	<p>Object permissions:</p> <ul style="list-style-type: none"> <li>• Read, View All</li> </ul> <p>Field permissions:</p> <ul style="list-style-type: none"> <li>• Read access on FSL__User__c</li> </ul>
Object Settings for User Setting Territories	<p>Object permissions:</p> <ul style="list-style-type: none"> <li>• Read, View All</li> </ul> <p>Field permissions:</p> <ul style="list-style-type: none"> <li>• Read access to: Service_Territory_Name__c</li> <li>• Edit access to: FSL__User__c and FSL__User_Setting__c</li> </ul>
Custom Setting Definitions	<ul style="list-style-type: none"> <li>• Mass Recurring NA Setting</li> </ul>
Apex Class Access	<p>Includes permission to execute the following Apex Classes:</p> <ul style="list-style-type: none"> <li>• <code>diab_sfs_ext.AbsenceCriteriaDto</code></li> </ul>



	<ul style="list-style-type: none"> <li>• <code>diab_sfs_ext.AbsenceTimeDto</code></li> <li>• <code>diab_sfs_ext.AddressDto</code></li> <li>• <code>diab_sfs_ext.CreateDeleteResourceAbsenceLwcController</code></li> <li>• <code>diab_sfs_ext.CreateResourceAbsence</code></li> <li>• <code>diab_sfs_ext.CreateResourceAbsenceHelper</code></li> <li>• <code>diab_sfs_ext.ExceptionsTests</code></li> <li>• <code>diab_sfs_ext.FieldException</code></li> <li>• <code>diab_sfs_ext.InputParametersDto</code></li> <li>• <code>diab_sfs_ext.RecordsExceedCountLimitException</code></li> <li>• <code>diab_sfs_ext.RecordsExceedDateLimitException</code></li> <li>• <code>diab_sfs_ext.RecurrenceHelper</code></li> <li>• <code>diab_sfs_ext.RecurrencePatternDto</code></li> <li>• <code>diab_sfs_ext.RecurrenceRangeDto</code></li> <li>• <code>diab_sfs_ext.RecurrenceStrategyDaily</code></li> <li>• <code>diab_sfs_ext.RecurrenceStrategyOnDate</code></li> <li>• <code>diab_sfs_ext.RecurrenceStrategyOnDay</code></li> <li>• <code>diab_sfs_ext.RecurrenceStrategyWeekly</code></li> <li>• <code>diab_sfs_ext.ResourceAbsenceDataFactory</code></li> <li>• <code>diab_sfs_ext.ResourceAbsenceTestFactory</code></li> <li>• <code>diab_sfs_ext.ResourceAbsenceTriggerHandler</code></li> <li>• <code>diab_sfs_ext.ResultDto</code></li> <li>• <code>diab_sfs_ext.ServiceResourceDataFactory</code></li> <li>• <code>diab_sfs_ext.ServiceResourceDataSource</code></li> </ul>
Visualforce Page Access	<p>Includes permission to access the following Visualforce Page:</p> <ul style="list-style-type: none"> <li>• <code>diab_sfs_ext.ResourceAbsenceMassDelete</code></li> </ul>

The table below summarizes the **Diab – Recurring Resource Absence Delete** permission set.

Permission Set Category	Description
Object Settings for Recurring Resource Absences	<p>Object permissions:</p> <ul style="list-style-type: none"> <li>• Read, Edit, Delete, View All, Modify All</li> </ul>
Apex Class Access	<p>Includes permission to execute the following Apex Classes:</p> <ul style="list-style-type: none"> <li>• <code>diab_sfs_ext.MassDeleteController</code></li> <li>• <code>diab_sfs_ext.CreateDeleteResourceAbsenceLwcController</code></li> <li>• <code>diab_sfs_ext.ResourceAbsenceDeleteOneRecord</code></li> <li>• <code>diab_sfs_ext.ResourceAbsenceMassDelete</code></li> </ul>



## Add Custom Utility Item to a Field Service Lightning App

The solution includes a custom utility item that is used to launch the user interface to mass create or delete recurring resource absences.

Since utility items are only supported in Lightning apps, the SFS-X Lightning app is included with the managed package. The SFS-X app has standard Field Service items configured as well as the Mass Recurring Non-Availabilities custom utility item.

You can further customize the provided SFS-X Lightning app, or you can create a new Lightning app and add the custom utility item

### *Add Custom Utility Item to an Existing Field Service Lightning App*

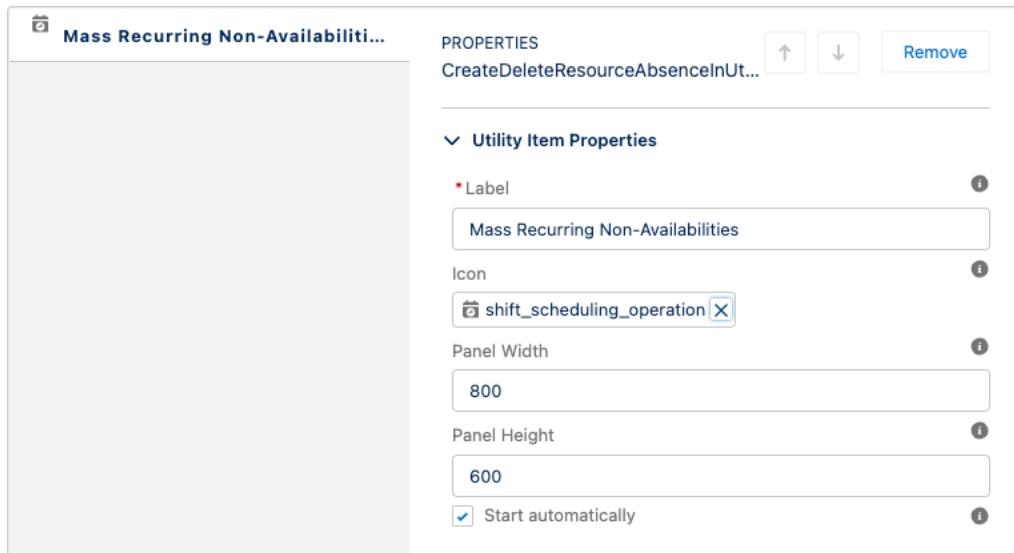
If you already have a Lightning app created for Field Service, and assigned to your dispatcher users, then you can simply add the custom Utility Item to your existing Field Service Lightning app.

1. From Setup, in the Quick Find box, enter App Manager, and then select **App Manager**.
2. Locate your custom Lightning app for Field Service, and click **Edit** on arrow next to the app.
3. From App Settings, click **Utility Items (Desktop Only)**.
4. In right panel, click **Add Utility Item**.
5. Scroll to Custom – Managed section and click **CreateDeleteResourceAbsenceInUtilitybar**.

The screenshot shows the 'Utility Items (Desktop Only)' configuration screen in the Lightning App Builder. The left sidebar lists 'App Settings' (App Details & Branding, App Options), 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main area displays a search bar and a list of utility items. Under 'Custom (4)', the 'CreateDeleteResourceAbsenceInUtilitybar' item is highlighted with a red box. Other items listed include 'Report Chart', 'Rich Text', 'To Do List', 'Visualforce', 'AlertMessagesInUtilitybar', 'FieldsetViewRenderer', and 'TestTimesheetData'. A note at the bottom right says 'To enable the utility bar for this app, add a utility item.'

6. Modify the Utility Item Properties:

- a. Enter a Label, e.g., Mass Recurring Non-Availabilities
- b. Optionally, change the default Icon.
- c. Set the Panel Width to 800 and the Panel Height to 600.
- d. Ensure to enable Start automatically and then click **Save**.



Now that the Mass Recurring Non-Availabilities utility item is added to your Field Service Lightning app, and assigned to profiles for dispatcher users, your users can start mass creating and deleting resource absences for multiple service resources.

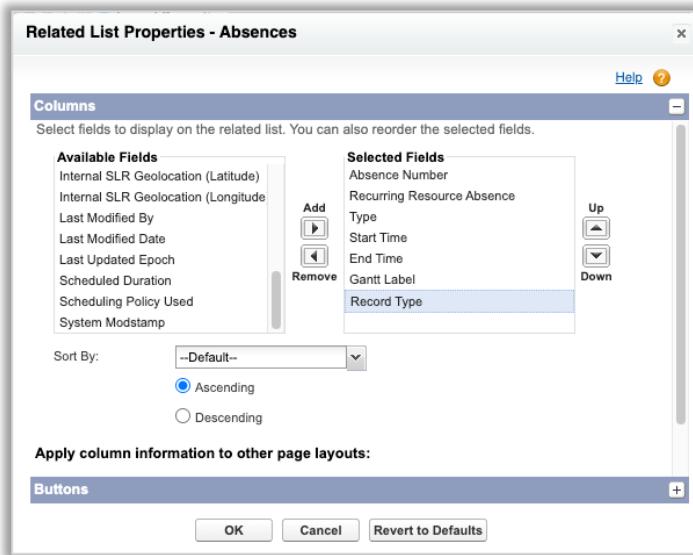
### Customize Absences Related List on Service Resource Page Layouts

To ensure users can view additional details about recurring absences for service resources, customize the Absences related list on your Service Resource page layouts.

1. From Setup, open Object Manager, and select **Service Resource**.
2. Click **Page Layouts**.
3. Open a Service Resource page layout to edit.
4. From the palette, click **Related Lists** element type.
5. Drag **Absences** from the palette to the Related Lists section on the layout.
6. Click the properties icon on the Absences related list. The related list configuration window opens.
7. Add the following fields to the Selected Fields area:
  - Recurring Resource Absence
  - Type



- Start Time
- End Time
- Gantt Label
- Record Type



8. Click **OK** to store your customizations and then **Save** the page layout.
9. If necessary, select other Service Resource page layouts to customize the Absences related list on other page layouts.

### Configure Resource Absence Page Layout

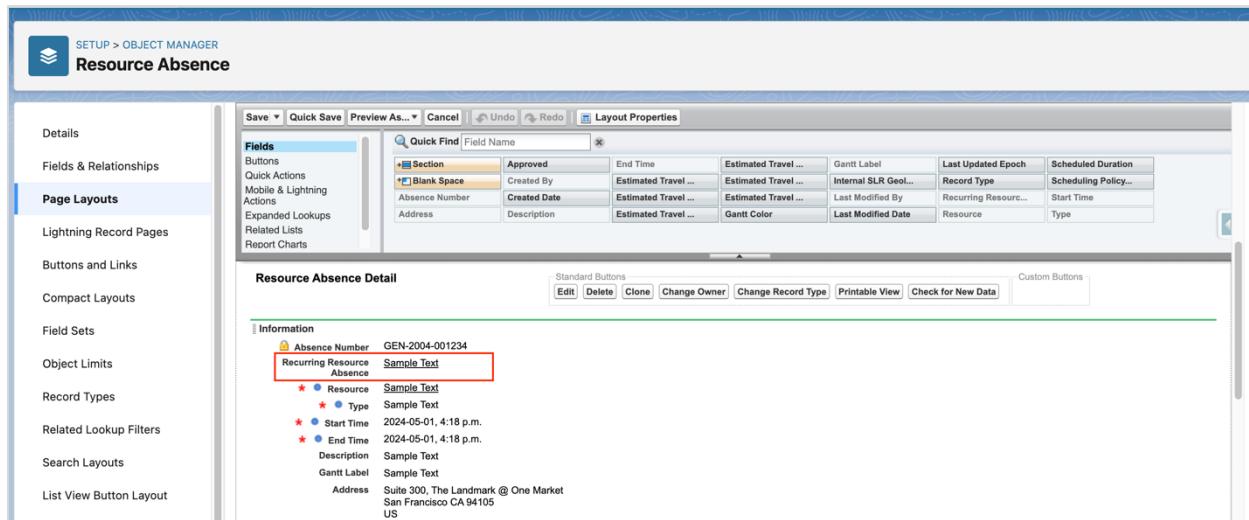
When using the utility to mass-create resource absences for many service resources at once, resource absence records are created for every service resource for each occurrence. A Recurring Resource Absence record is automatically created as the parent record to all resource absence records created in the series.

Each resource absence record is automatically populated with its parent Recurring Resource Absence record.

To help view information related to recurring resource absences, ensure to add the Recurring Resource Absence field to your Resource Absence page layouts.

1. From Setup, open Object Manager, and select **Resource Absence**.
2. Click Page Layouts.
3. Click the **FSL Resource Absence Layout** page layout to open.

4. From the Fields element type on the palette, drag **Recurring Resource Absence** field from the palette to the page layout.
5. Click **Save**.
6. If necessary, select other Resource Absence page layouts and add the Recurring Resource Absence field.



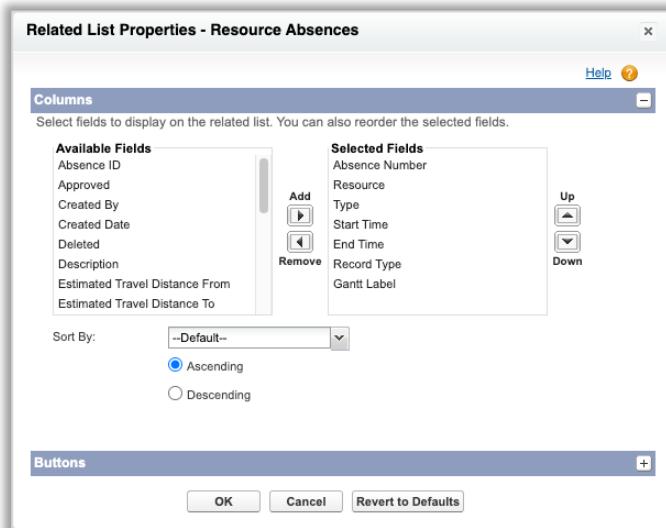
## Configure Resource Absence Related List on Recurring Resource Absence Page Layout

The Mass Recurring Non-Availabilities feature includes the Recurring Resource Absence custom object, which serves as the parent record for a series of related **Resource Absence** records. This relationship allows users to trace individual absences back to their originating series.

**NOTE:** Ensure that relevant users have access to the necessary object and field-level access to Recurring Resource Absence records.

To help users view and access all related resource absence records in one place, customize the Resource Absence related list on the Recurring Resource Absence page layout.

1. From Setup, open Object Manager, and select **Recurring Resource Absence**.
2. Click **Page Layouts**.
3. Open the **Recurring Resource Absence Layout** page layout to edit.
4. Click **Related Lists** element type in the palette.
5. Click the properties icon on the Resource Absences related list to configure the fields and sorting options.



6. In the Columns section, add the following fields to the Selected Fields area:

- Absence Number
- Resource
- Type
- Start Time
- End Time
- Record Type
- Gantt Label

7. Click **OK** to store your customizations and then **Save** the page layout.

This setup allows users to quickly view and manage all absence records associated with a recurring series from a single location.

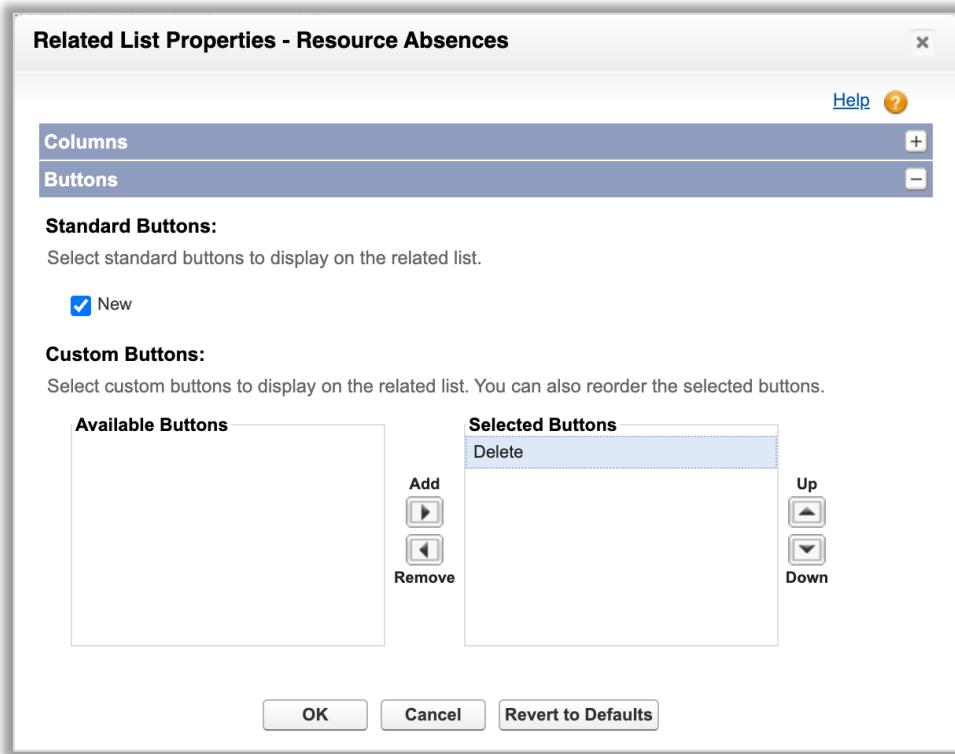
#### Add Delete Action to Resource Absence Related List

A mass delete action is included with the Mass Recurring Non-Availabilities feature. You can configure the custom action button to be available for your users on the Resource Absence related list on a Recurring Resource Absence record. This action will allow dispatcher users to select and delete many or all records in the series.

1. From Setup, open Object Manager, and select **Recurring Resource Absence**.
2. Click **Page Layouts**.
3. Open the **Recurring Resource Absence Layout** page layout to edit.
4. Click **Related Lists** element type in the palette.
5. Click the properties icon on the Resource Absences related list. The related list configuration window opens.
6. Scroll to the Buttons section and click the plus (+) icon to expand the section.



7. In the Custom Buttons section, select the Delete button in the Available Buttons list and add it to Selected Buttons.



8. Click **OK** to store your customizations and then **Save** the page layout.

Once configured, users will have access to mass delete functionality from the Resource Absence related list.

Resource Absences					
Recurring Resource Absences > RRA0774					
3 items selected					
	Resource	Type	Start Time	End Time	
1	<input checked="" type="checkbox"/> Sai	Vacation	2024-06-07, 11:00 a.m.	2024-06-07, 11:30 a.m.	
2	<input checked="" type="checkbox"/> Sai	Vacation	2024-06-08, 11:00 a.m.	2024-06-08, 11:30 a.m.	
3	<input checked="" type="checkbox"/> Sai	Vacation	2024-06-09, 11:00 a.m.	2024-06-09, 11:30 a.m.	
4	<input type="checkbox"/> Sai	Vacation	2024-06-10, 11:00 a.m.	2024-06-10, 11:30 a.m.	
5	<input type="checkbox"/> Sai	Vacation	2024-06-11, 11:00 a.m.	2024-06-11, 11:30 a.m.	
6	<input type="checkbox"/> Sai	Vacation	2024-06-12, 11:00 a.m.	2024-06-12, 11:30 a.m.	
7	<input type="checkbox"/> Sai	Vacation	2024-06-13, 11:00 a.m.	2024-06-13, 11:30 a.m.	
8	<input type="checkbox"/> Sai	Vacation	2024-06-14, 11:00 a.m.	2024-06-14, 11:30 a.m.	
9	<input type="checkbox"/> Sai	Vacation	2024-06-15, 11:00 a.m.	2024-06-15, 11:30 a.m.	
10	<input type="checkbox"/> Sai	Vacation	2024-06-16, 11:00 a.m.	2024-06-16, 11:30 a.m.	

## Configure Resource Absence Lightbox Field Set

Field sets control which fields appear in specific areas of the Field Service dispatcher console. The Resource Absence Lightbox field set controls the layout of the detail dialog that appears when a user double-clicks a Resource Absence on the Gantt.

To provide visibility into recurring absences, you can modify this field set to include the Recurring Resource Absence field. This allows dispatchers to:

- Identify which recurring series a Resource Absence belongs to
- Click through to the parent Recurring Resource Absence record to view all related absences

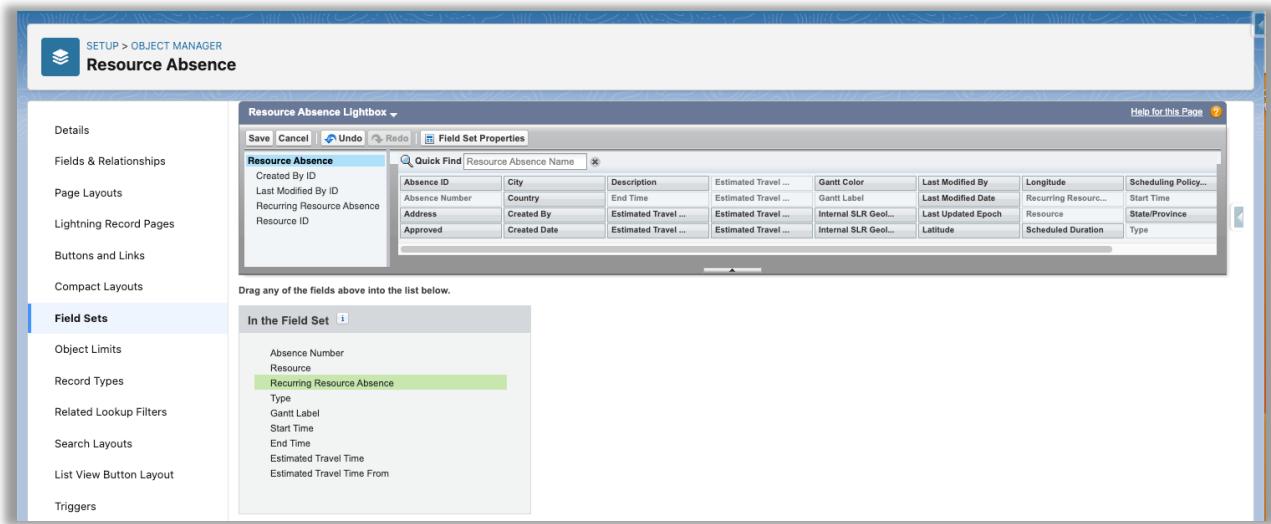
To modify the field set:

1. From Setup, open Object Manager, and select **Resource Absence**.
2. Click **Field Sets**.
3. Open the **Resource Absence Lightbox** field set to edit.

Field Sets		
3 Items, Sorted by Field Label		
	FIELD LABEL	API NAME
Absence Resource Calendar Tooltip	FSL__Absence_Resource_Calendar_Tooltip	
Resource Absence Lightbox	FSL__Resource_Absence_Lightbox	
Resource Absence Resource Calendar	FSL__Resource_Absence_Resource_Calendar	



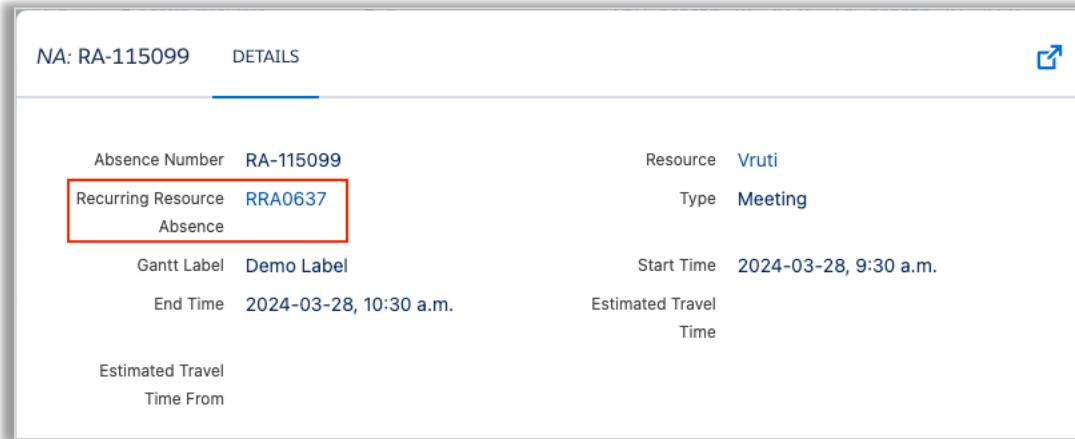
4. Drag the **Recurring Resource Absence** field from the palette to the In the Field Set list.



5. Click **Save**.

The Recurring Resource Absence field and link to the record will now display on the dialog layout when a user double-clicks a resource absence on the Gantt.

**NOTE:** Only resource absences that were created using the SFS-X Mass Recurring Non-Availabilities utility will have a Recurring Resource Absence value.



## Configure Maximum Resource Absence Records

By default, the Mass Recurring Non-Availability component limits the maximum number of resource absence records allowed (per service resource) to 100 in a single transaction.

However, the Mass Recurring NA Settings custom setting is provided to be able to customize the maximum number of resource absence records that can be created in a single transaction for each Service Resource selected.

You can reduce or increase the max allowed by creating a record in the provided custom setting and entering the desired value. If a value is present, then the component respects the new value you set.

The **Max Resource Absence Records Allowed** field is null when the package is initially installed.

1. From Setup, enter Custom Settings in the Quick Find box, then select **Custom Settings**.
2. Next to Mass Recurring NA Settings, click **Manage**.

The screenshot shows the Salesforce Custom Settings page. At the top, there's a header with a gear icon labeled 'SETUP' and 'Custom Settings'. Below the header, the title 'Custom Settings' is displayed, along with a 'Help for this Page' link. A note below the title states: 'Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.' There are buttons for 'View: All' and 'Create New View', and a 'Get Usage' button. Below these are navigation links for letters A through Z and an 'All' link. A 'New' button is also present. The main area is a table with the following data:

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
<a href="#">Manage</a>	Mass Recurring NA Settings	Public	Hierarchy	diab_sfs_ext		103	0	0

3. Click **New**.

The screenshot shows the 'Custom Setting' section of the 'Mass Recurring NA Settings' page. At the top, there's a 'Help for this Page' link. Below it, a note says: 'If the custom setting is a list, click New to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.' Another note below it says: 'If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.' A 'New' button is located at the bottom of the table.

4. In the Mass Recurring NA Settings Edit page, enter a value in the **Max Resource Absence Records Allowed** field to reduce or increase the number of resource absence records per Service Resource that can be created in a single transaction. A max value of 999 can be entered.

The screenshot shows the 'Edit Mass Recurring NA Settings' page. It has a 'Save' and 'Cancel' button at the top right. Below it, a table titled 'Mass Recurring NA Settings Information' contains a single row with a 'Location' column and a 'Max Resource Absence Records Allowed' column. The 'Max Resource Absence Records Allowed' column contains the value '50'. A note at the bottom right indicates that a red border around a field means it is required information.

5. Click **Save**.

With the value set to 50, when dispatchers use the Mass Recurring Non-Availabilities utility, they will be prevented from creating more than 50 resource absence records per service resource in a single transaction. You can modify this value in the custom settings record as needed.



Error  
Exceeds maximum number of records. You can create up to 50 resource absences per service resource selected.

Absence Time

Type: Meeting   Gantt Label:   Gantt Color:

Start time: 3:30:00 p.m.   Finish time: 4:00:00 p.m.   Time zone: (GMT-04:00) Eastern Daylight Time (America/New...)

Recurrence Pattern

Recurrence period: Weekly   Frequency: 1   Days: Sun, Mon, Tue, **Wed**, Thu, Fri, Sat

Range of Recurrence

Start: Jun 10, 2024   End by:    End after:    Occurrences: 100

Exceeds maximum number of records. You can create up to 50 resource absences per service resource selected.

Mass Recurring Non-Availabilities

	Type ↑	Gantt La...
Meeting	Weekly S...	
Training	Safety Tr...	



## Timesheets Management

The Timesheets Management feature in SFS-X streamlines time tracking for Salesforce Field Service mobile users. It offers a clean, intuitive weekly interface where technicians can log time manually or benefit from automated entries linked to Service Appointments and Resource Absences.

With full offline support and flexible configuration, this feature fits easily into various operational workflows, reducing administrative overhead and improving time entry accuracy.

### Key Features

#### Time Entry Management

- Technicians can create multiple entries per day, specifying duration, activity type, and comments.
- Offline capability allows entries to be created and edited without connectivity; changes sync once reconnected.
- Time entries are automatically generated for Service Appointments (In Progress, Completed) and Resource Absences.

#### Approval Status Visibility

- Each daily timesheet displays a clear status icon: *New, Submitted, Approved, Rejected*.
- Once submitted, entries become read-only for technician.

#### Weekly Timesheet View

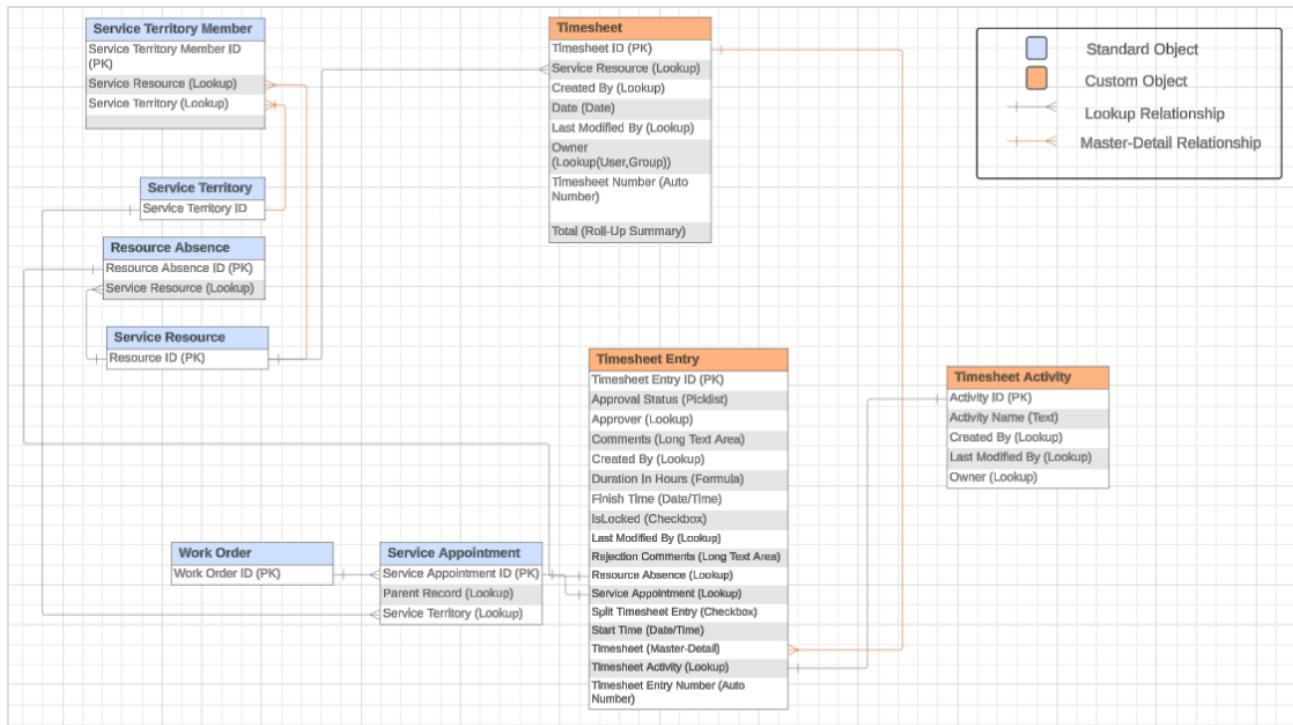
- A user-friendly weekly interface shows daily entries, totals, and approval status by day.
- Users can navigate across weeks, limited by configurable metadata.
- All entries are managed from a single weekly screen.

#### Admin Configuration Options

- Customize required fields, visible days, icons, and UI elements (fonts, colors).
- Define available activity types and control access by user profile.
- No template setup required—daily entries are made directly within the provided weekly layout.

## Metadata

### Timesheets Management Object Schema



### Custom Object: Timesheet

The Timesheet custom object represents a Service Resource's daily timesheet.

Field Label	API Name	Data Type	Description
Approver	Approver__c	Lookup (User)	Automatically updates with the approver for the Timesheet from either the Timesheet Reviewer specified on the user record, or the default timesheet reviewer specified in the Custom Metadata Type record.
Approval Status	ApprovalStatus__c	Picklist	Automatically updates the approval status of the daily Timesheet throughout the approval process. <ul style="list-style-type: none"> <li>• New</li> <li>• Submitted</li> <li>• Approved</li> <li>• Rejected</li> </ul>



Date	Date__c	Date	Date associated with the Timesheet
Service Resource	ServiceResource__c	Lookup (Service Resource)	Technician for which the daily Timesheet is created for.
Total	Total__c	Roll-Up Summary (SUM Timesheet Entry)	Represents the sum of the Duration field (in hours) of all Timesheet Entries related to the daily Timesheet.
Created By	CreatedById	Lookup (User)	Populates with user who creates the Timesheet record when a Timesheet Entry is created.

### Custom Object: Timesheet Entry

The Timesheet Entry object represents Timesheet line items.

Field Label	API Name	Data Type	Description
Approval Status	ApprovalStatus__c	Picklist	Automatically updates the approval status of the Timesheet Entry throughout the approval process. <ul style="list-style-type: none"> <li>• New</li> <li>• Submitted</li> <li>• Approved</li> <li>• Rejected</li> </ul>
Comments	Comments__c	TextArea (32768)	For Technician to enter a comment on a Timesheet Entry.
Duration in Hours	DurationInHours__c	Formula	The duration of the Timesheet Entry in hours.  $(\text{EndTime}__c - \text{StartTime}__c) * 24$
End Time	EndTime__c	Date/Time	Captures the end time for the Timesheet Entry.
IsLocked	IsLocked__c	Checkbox	Flag to indicate if the Timesheet Entry record is locked.
Rejection Comments	RejectionComments__c	TextArea (32768)	Used for supervisor to enter a comment when rejecting a Timesheet Entry.



Resource Absence	ResourceAbsence__c	Lookup (Resource Absences)	Resource Absence that is associated with the Timesheet Entry.
Service Appointment	ServiceAppointment__c	Lookup (Service Appointment)	Service Appointment that is associated with the Timesheet Entry.
Service Resource	ServiceResource__c	Lookup (Service Resource)	Service Resource that is associated with the Timesheet Entry.
Split Timesheet Entry	SplitTimesheetEntry__c	Checkbox	Flag to indicate whether a Timesheet Entry was split by Technician.
Start Time	StartTime__c	Date/Time	Captures the start time for the Timesheet Entry.
Timesheet	Timesheet__c	Master-Detail (Timesheet)	The parent Timesheet associated with the Timesheet Entry.
Timesheet Activity	TimesheetActivity__c	Lookup (Timesheet Activity)	The activity associated with the Timesheet Entry.
Timesheet Activity	TimesheetActivityName__c	Formula (Text)	Used as a workaround to display the text value of the lookup field in lightning web components on mobile.
Timesheet Entry Number	Name	Auto Number	Auto-generated record number.
Timesheet Entry Type	TimesheetEntryType__c	Picklist	Automatically populated by the following type of entry: <ul style="list-style-type: none"> <li>• Manual</li> <li>• Resource Absence</li> <li>• Service Appointment</li> </ul>

### Custom Object: Timesheet Activity

The Timesheet Activity object is used to represent the type of activity performed by a Service Resource.

The Timesheet Activity object is included to provide the necessary structure to further add schema (related to automation, integration etc.) based on your individual needs. Currently the Timesheet Management App does not have any automation or functionality tied to the Timesheet Activity Object.

The Timesheet Activity field is included in the Timesheet Entry form for users to manually select a relevant activity from a list of custom records.



Field Label	API Name	Data Type	Description
Activity Name	Name	Text(80)	Enter a name for a custom activity, e.g., Maintenance, Repair...

### Custom Field: User Standard Object

Field Label	API Name	Data Type	Description
Timesheet Reviewer	Timesheet_Reviewer__c	Hierarchy	User responsible for reviewing a service resource's timesheet.

### Custom Metadata Type

The following Custom Metadata Types are included in the Timesheet Management App solution.

- TS Admin Setting
- TS Approval Status UI Setting
- TS Default Reviewer

### Page Layouts

Page layouts are provided to customize the fields that are available in various areas of the Timesheet Management App.

#### *Timesheet Object*

- **Timesheet App Weekly View Layout**  
Used to configure the fields that display on the daily timesheet in the Timesheet App weekly view.
- **Timesheet Layout**  
Used to configure the fields that display when viewing Timesheet records in the org.

#### *Timesheet Entry Object*

- **Timesheet App Create Layout**  
Used to configure the fields that display on the Timesheet Entry form when technicians are creating a new timesheet entry, e.g. Comments or any custom field.
- **Timesheet App Daily List View Layout**  
Used to configure the fields/columns that display in the timesheet entry list view in the app.



- **Timesheet App Edit Layout**  
Used to configure the fields that are available for technicians when editing a timesheet entry from the Timesheet App.
- **Timesheet App View Layout**  
Used to configure the fields that display for technicians viewing a timesheet entry from the Timesheet App.
- **Timesheet Entry Layout**  
Used to configure the fields that display when viewing Timesheet Entry records within the org.



## Flows

The following flows are included in the managed package and installed in a **deactivated state**. When you're ready to use them, activate each as needed.

These flows are installed as **Templates**. Users with the **Manage Flows** permission can view and clone them but cannot save changes to the original template. To customize a flow, save it as a new version.

Flow Name	Type	Description
Timesheets: Automatic Creation of Timesheet Entries for Service Appointments	Record-Triggered Flow (After Save)	Creates a timesheet entry automatically when a Service Appointment status changes to an <i>In Progress</i> category.
Timesheets: Automatic Creation of Timesheet Entries for Resource Absences	Record-Triggered Flow (After Save)	Creates a timesheet entry when a new Resource Absence record is created.
Timesheets: Submit for Approval	Record-Triggered Flow (After Save)	Submits the Timesheet for approval to the assigned reviewer and updates the status of related entries.
Timesheets: Select Individual Timesheet Entries to Approve or Reject	Screen Flow	Enables reviewers to approve or reject individual Timesheet Entries within a daily Timesheet.
Timesheets: Update IsLocked in Timesheet Entry Record	Record-Triggered Flow (Before Save)	Sets the <i>IsLocked</i> checkbox on entries when a Timesheet is submitted or approved. Used by the app UI to control edit/view access.

## Actions

The following custom action is included with Timesheet Management. It should be added to the Timesheet record page to allow designated users to review and approve timesheet entries.

Object	Label	Action Type	Description
Timesheet	Approve/Reject Entries	Flow (Flow name: Timesheet Mass Approval)	Launches a screen flow allowing reviewers to approve or reject individual entries. Configure as an action button on the Timesheet record page.



## Configuration

Once the SFS-X package is installed and the Timesheets feature is enabled, complete the following configuration steps before technicians can begin using the Timesheet Management App.

- [Assign Permissions](#)  
Assign the provided permission sets to technicians who will be using the Timesheet Management App in the Field Service mobile app and supervisors who will be reviewing and approving timesheets.
- [Install Approval Processes](#)  
Activate the approval processes included with the package to support automated submission and approval of timesheets.
- [Add Timesheet Reviewer](#)  
Assign a **Timesheet Reviewer** to each **Service Resource** via their user record. This user will receive timesheet approval requests.
- [Specify a Default Timesheet Reviewer](#)  
Configure the provided Custom Metadata Type to define a default reviewer. If a Service Resource does not have a Timesheet Reviewer assigned, approval requests will be routed to this default user.
- [Add Timesheets Related List to Service Resource Page Layout](#)  
Update the Service Resource page layout to include the Timesheets related list. This gives supervisors visibility into timesheets associated with each technician.
- [Configure Timesheet Page Layout](#)  
Customize the Timesheet page layout by configuring the Timesheet Entries related list. This allows users to view and access detailed time entry records.
- [Add Global Action for Field Service Mobile App Users](#)  
Add the Timesheet Management App global action to the Publisher Layout assigned to Field Service mobile profiles. This enables access to the app from the Actions menu in the mobile app.
- [Customize the Timesheet Management App](#)  
Use the provided Custom Metadata Type records to tailor the behavior and configuration of the Timesheet Management App to fit your organization's needs.
- [Activate Flows](#)  
The Flows included with the package are deployed in an inactive state. Activate the relevant Flows once your organization is ready to use the automation functionality.



## Assign Permissions

### *Permissions for Technician Users*

The SFS-X package includes the **Diab - Timesheet Management Technician** permission set, which must be assigned to all mobile users who will be using the Timesheet Management App in the Field Service mobile app.

This permission set provides the necessary access to view, create, and manage time entries directly from the weekly timesheet interface.

The table below summarizes the permissions included in the Diab – Timesheet Management Technician permission set.

Permission Set Category	Description
Object Settings - Timesheet	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>• Visible</li> </ul> <p>Includes the following object permissions:</p> <ul style="list-style-type: none"> <li>• Read, Create, Edit</li> </ul> <p>Includes access for the following fields:</p> <ul style="list-style-type: none"> <li>• Approval Status (Edit)</li> <li>• Approver (Edit)</li> <li>• Date (Edit)</li> <li>• Service Resource</li> <li>• Timesheet Number (Read)</li> <li>• Total (Read)</li> </ul>
Object Settings – Timesheet Entries	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>• not available</li> </ul> <p>Includes the following object permissions:</p> <ul style="list-style-type: none"> <li>• Read, Create, Edit</li> </ul> <p>Includes access for the following fields:</p> <ul style="list-style-type: none"> <li>• Approval Status (Edit)</li> <li>• Comments (Edit)</li> <li>• Duration in Hours (Read)</li> <li>• End Time (Edit)</li> </ul>



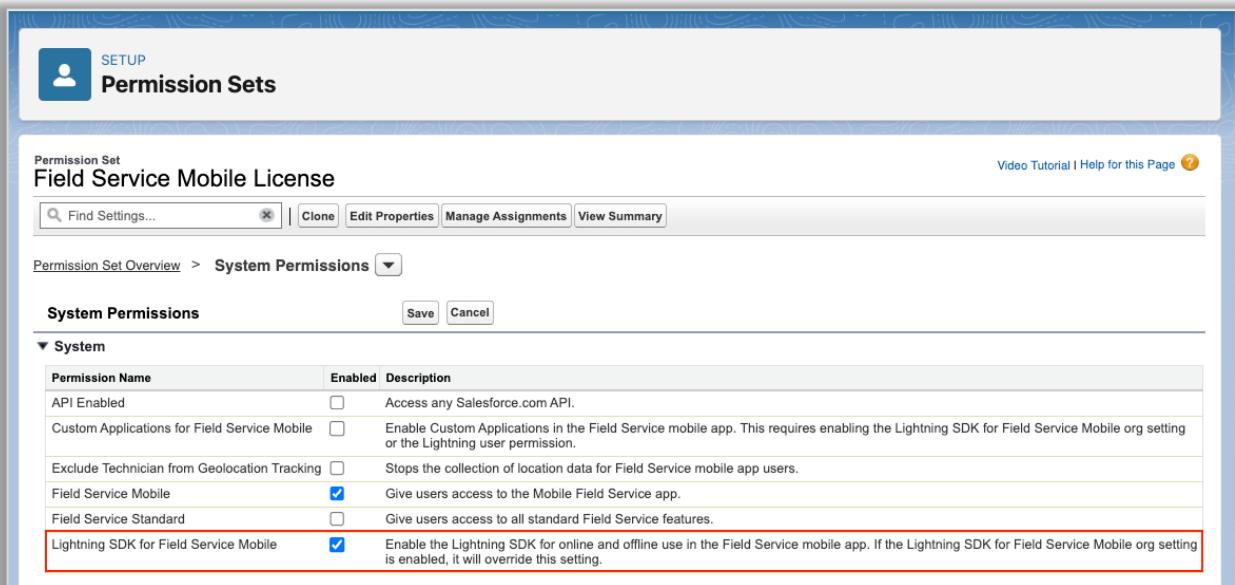
	<ul style="list-style-type: none"> <li>• IsLocked (Edit)</li> <li>• Rejection Comments (Edit)</li> <li>• Resource Absence (Edit)</li> <li>• Service Appointment (Edit)</li> <li>• Service Resource (Edit)</li> <li>• Split Timesheet Entry (Edit)</li> <li>• Start Time (Edit)</li> <li>• Timesheet (Edit)</li> <li>• Timesheet Entry Number (Read)</li> <li>• Timesheet Entry Type (Edit)</li> </ul>
Object Settings – Timesheet Activities	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>• not available</li> </ul> <p>Includes the following object permissions:</p> <ul style="list-style-type: none"> <li>• Read, Create, Edit</li> </ul> <p>Includes access for the following fields:</p> <ul style="list-style-type: none"> <li>• Activity Name (Edit)</li> <li>• Owner (Edit)</li> </ul>
Apex Class Access	<p>Includes permission to execute the following Apex Classes:</p> <ul style="list-style-type: none"> <li>• SetApprovalStatusOnApprovalRequest</li> <li>• TimesheetController</li> <li>• TimesheetControllerHelper</li> <li>• TimesheetControllerTest</li> <li>• TimesheetDTO</li> <li>• TimesheetDataFactory</li> <li>• TimesheetEntryTriggerHandler</li> <li>• TimesheetEntryTriggerHandlerTest</li> <li>• TimesheetExceptionHandler</li> </ul>
Custom Metadata Types	<p>Includes permission to access the following Custom Metadata Types:</p> <ul style="list-style-type: none"> <li>• TS Admin Setting</li> <li>• TS Approval Status UI Setting</li> <li>• TS Default Reviewer</li> </ul>

## *Enable Access to LWC on Field Service Mobile*

The **Lightning SDK for Field Service Mobile** system permission must be enabled for your Field Service Mobile users to have LWC quick actions display in the Field Service mobile app.

To grant access to this system permission:

6. From Setup, enter Permission Sets in the Quick Find box and select **Permission Sets**.
7. Select an existing permission set that is assigned to your Field Service mobile users or create a new permission set.  
NOTE: The standard FSL permission set, Field Service Mobile License can be modified or any other existing permission set assigned to your Field Service mobile app users.
8. Click **System Permissions**, and then click **Edit**.
9. Select **Lightning SDK for Field Service Mobile** and then click **Save**.



10. If you created a new permission set, click **Manage Assignments**, and assign this permission set to Field Service mobile app users. If you edited an existing permission set such as the Field Service Mobile License, then your Field Service mobile users will have the permission applied through the existing permission set assignment.

### IMPORTANT TO NOTE

If the **Lightning SDK for Field Service Mobile** permission is not enabled for a user, then the Timesheet Management action will not be available in the Actions menu on the Field Service mobile app for the user, even if the component is configured on the publisher layout and assigned to user.



## *Assign Permission Set to Supervisor Users*

The **Diab – Timesheet Management Supervisor** permission set must be assigned to all supervisor users responsible for reviewing and approving Timesheets and Timesheet Entries submitted by technician.

This permission set provides access to the necessary records, related lists, and approval functionality required for managing technician time submissions.

The table below summarizes the permissions included in the Diab – Timesheet Management Supervisor permission set.

Permission Set Category	Description
Object Settings - Timesheet	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>• Visible</li> </ul> <p>Object permissions:</p> <ul style="list-style-type: none"> <li>• Read, Create, Edit, Delete, View All, Modify All</li> </ul> <p>Field permissions:</p> <ul style="list-style-type: none"> <li>• Approval Status (Edit)</li> <li>• Approver (Edit)</li> <li>• Date (Edit)</li> <li>• Service Resource (Edit)</li> <li>• Timesheet Number (Read)</li> <li>• Total (Read)</li> </ul>
Object Settings – Timesheet Entries	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>• Visible</li> </ul> <p>Includes the following object permissions:</p> <ul style="list-style-type: none"> <li>• Read, Create, Edit, Delete, View All, Modify All</li> </ul> <p>Includes edit access for the following fields:</p> <ul style="list-style-type: none"> <li>• Approval Status (Edit)</li> <li>• Comments (Edit)</li> <li>• Duration in Hours (Read)</li> <li>• End Time (Edit)</li> <li>• IsLocked (Edit)</li> <li>• Rejection Comments (Edit)</li> </ul>



	<ul style="list-style-type: none"> <li>• Resource Absence (Edit)</li> <li>• Service Appointment (Edit)</li> <li>• Split Timesheet Entry (Edit)</li> <li>• Start Time (Edit)</li> <li>• Timesheet (Edit)</li> <li>• Timesheet Activity (Edit)</li> <li>• Timesheet Entry Number (Read)</li> <li>• Timesheet Entry Type (Edit)</li> </ul>
Object Settings – Timesheet Activities	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>• Visible</li> </ul> <p>Includes the following object permissions:</p> <ul style="list-style-type: none"> <li>• Read, Create, Edit, Delete, View All, Modify All</li> </ul> <p>Includes access for the following fields:</p> <ul style="list-style-type: none"> <li>• Activity Name (Edit)</li> <li>• Owner</li> </ul>
Apex Class Access	<p>Includes permission to execute the following Apex Classes:</p> <ul style="list-style-type: none"> <li>• SetApprovalStatusOnApprovalRequest</li> <li>• TimesheetController</li> <li>• TimesheetControllerHelper</li> <li>• TimesheetControllerTest</li> <li>• TimesheetDataFactory</li> <li>• TimesheetDTO</li> <li>• TimesheetEntryTriggerHandler</li> <li>• TimesheetEntryTriggerHandlerTest</li> <li>• TimesheetExceptionHandler</li> </ul>
Custom Metadata Types	<p>Includes permission to access the following Custom Metadata Types:</p> <ul style="list-style-type: none"> <li>• TS Admin Setting</li> <li>• TS Approval Status UI Setting</li> <li>• TS Default Reviewer</li> </ul>



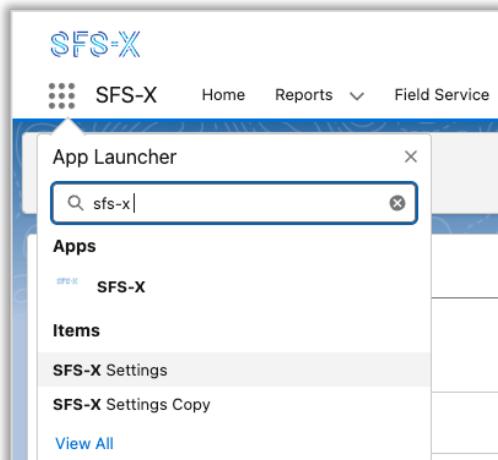
## Install Approval Processes

Two preconfigured approval processes are included with the SFS-X package to support the Timesheet Management functionality. These must be installed by an administrator using the SFS-X Settings app.

**NOTE:** To access the SFS-X Settings app, users must be assigned the **Diab – SFSX Admin Permissions** permission set.

To install the approval processes:

1. Click App Launcher.
2. In the search bar, type SFS-X, then select **SFS-X Settings**.



3. On the SFS-X Settings page, click **SFS-X Resource Library**. The two approval processes will be listed.

Approval Process	Description	Action
Timesheet Approval Process	Create the 'Timesheet Approval Process'.	<a href="#">Create Approval Process</a>
Timesheet Approval Process With No Approver	Create the 'Timesheet Approval Process With No Approver'.	<a href="#">Create Approval Process</a>

4. Click **Create Approval Process** next to each item to generate the preconfigured approval processes. This action will create the approval processes already configured for the Timesheet Management app functionality.
5. From Setup, enter Approval Processes in the Quick Find box and select **Approval Processes**.
6. Confirm that both approval processes have been created and are listed under the **Timesheet** object.

The screenshot shows the 'Approval Processes' page for the 'Timesheet' object in the Salesforce Setup. At the top, there's a help section with 7 steps for creating approvals. Below it, a dropdown menu says 'Manage Approval Processes For: Timesheet'. The main area lists 'Active Approval Processes' with two entries:

Action	Process Order	Approval Process Name	Description
Edit   Deactivate	1	Timesheet Approval Process	An approval process to allow Supervisors to approve or reject a Timesheet and Timesheet Entries.
Edit   Deactivate	2	Timesheet Approval for No Approver	An approval process which will allow Administrators to Approve or Reject when Approver is not present on the User Record.

Once the associated Flows have been activated, these approval processes enable automatic submission and approval routing for technician timesheets.

**NOTE:** These approval processes can be modified.

#### Add Timesheet Reviewer Field to User Page Layout

To ensure supervisors or HR personnel can assign a Timesheet Reviewer to each technician, the custom Timesheet Reviewer field must be added to the User object's page layout.

This field is used to define the user responsible for approving a technician's timesheets on their user record.

To add the Timesheet Reviewer field to the User page layout:

1. From Setup, enter Object Manager in the Quick Find box, then select User.
2. Click **Page Layouts**.
3. Select the **User Profile Page Layout** (or the appropriate layout used in your org).
4. In the layout editor, click the Fields section in the palette.



5. Drag the **Timesheet Reviewer** field onto the desired section of the page layout.

6. Click **Save**.

**NOTE:** If your org uses multiple page layouts for different user types, repeat these steps for each layout where Timesheet Reviewer assignment is required.

## Specify a Timesheet Reviewer on User Record of Service Resource

After adding the Timesheet Reviewer field to the User page layout, you must update each technician's User record to assign a designated reviewer. The selected reviewer will receive approval requests when the technician submits timesheets.

### NOTE:

- Ensure the Timesheet Reviewer field is added to the relevant User Page Layout(s).
- Confirm that it is visible to user profiles responsible for managing User records.

To assign a Timesheet Reviewer:

1. Navigate to the Service Resource record for the technician.
2. In the User field, click the linked User name (e.g., Peter Smith) to open the related User record.
3. On the User record, click **Edit**.
4. Click the **Timesheet Reviewer** field, search and select the appropriate reviewer user (e.g., supervisor or manager).



## 5. Click Save.

The screenshot shows the SFS-X mobile application interface. On the left, there's a sidebar with a user icon and the name 'Pete'. The main area has a title 'Edit Peter Smith' and a note '\*= Required Information'. It contains fields for Name (First Name: Peter, Last Name: Smith), Title (Technicien), Manager (Search People...), Timesheet Reviewer (Search People... highlighted with a red box), Company Name, Phone, and Mobile. Below these are Email (gflorence@diabsolut.com) and Address (Search Address). At the bottom right are 'Cancel' and 'Save' buttons.

**NOTE:** Ensure the selected reviewer has the necessary permissions and is assigned the Diab – Timesheet Management Supervisor permission set to approve timesheets.

Repeat this process for each technician who will be submitting timesheets through the mobile app.

## Specify a Default Timesheet Reviewer

You can define a default Timesheet Reviewer to receive approval requests in either of the following cases:

- a technician does not have a Timesheet Reviewer assigned on their User record.
- all users should route their timesheet approvals to a single reviewer.

This is configured using a Custom Metadata Type record.

To configure a default Timesheet Reviewer:

1. From Setup, in the Quick Find box, enter Custom Metadata Types, and select **Custom Metadata Types**.
2. Click **Manage Records** next to TS Default Reviewer.
3. From the list view, click **New**.
4. Enter a Label and Name for the record.
5. In the Default Timesheet Reviewer field, enter the username of the user who will act as the default reviewer.

**NOTE:** This must match the Salesforce username exactly, in email address format (e.g., approver@company.com).

6. Click **Save**.

TS Default Reviewer Edit		Save	Save & New	Cancel
<b>Information</b>				
Label	<input type="text" value="Default Timesheet Revie"/>			
TS Default Reviewer Name	<input type="text" value="Default_Timesheet_Revie"/> <small>i</small>			
Default Timesheet Reviewer	<input type="text" value="user@example.com"/>			

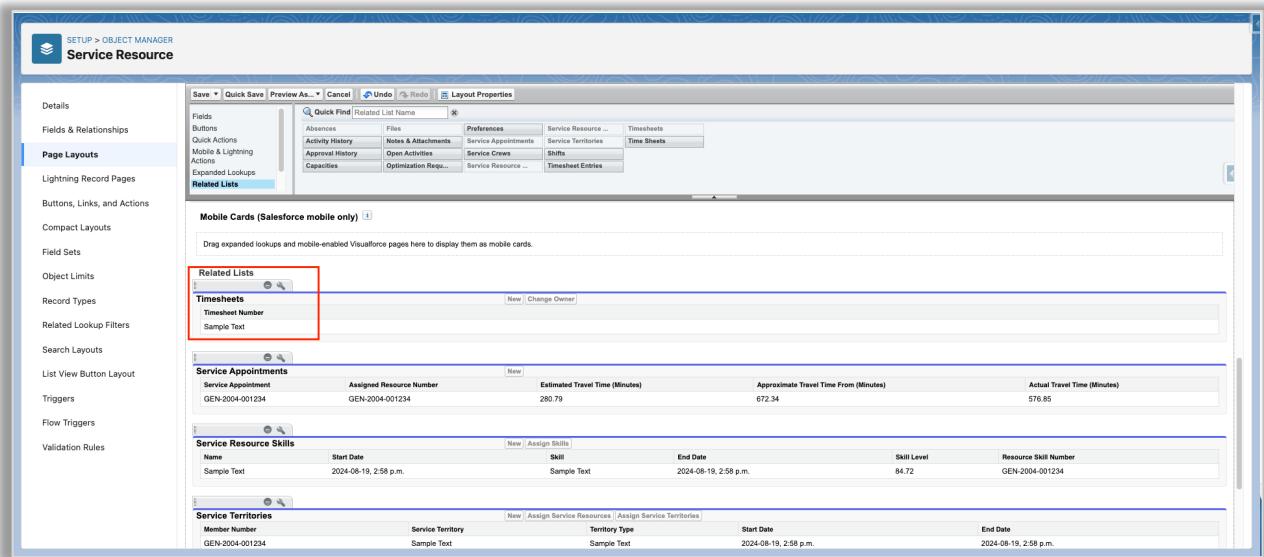
This configuration ensures fallback routing of approval requests when a Timesheet Reviewer is not explicitly set on a User record.



## Add Timesheets Related List to Service Resource Page Layout

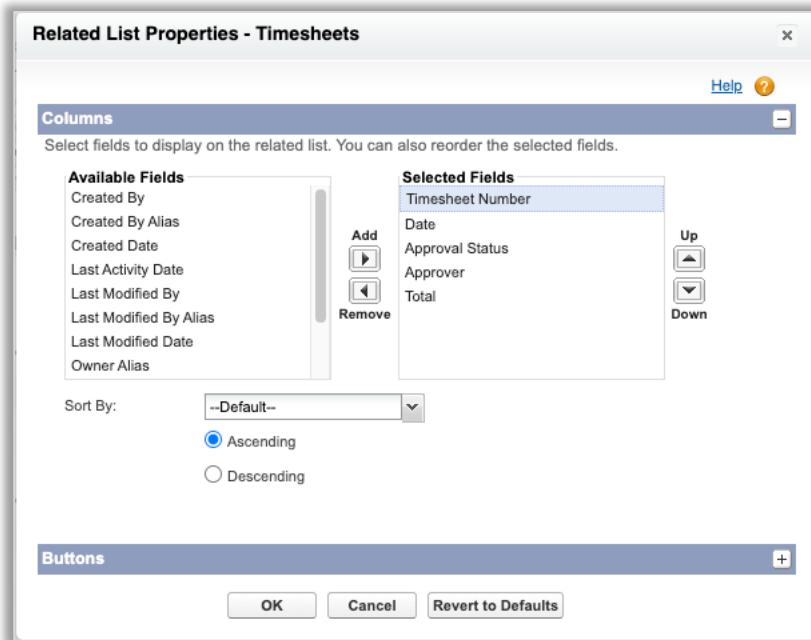
To help supervisors view and access all timesheets and relevant details related to each service resource, customize the Timesheets related list on the Service Resource page layout.

1. From Setup, open Object Manager, and select **Service Resource**.
2. Click **Page Layouts**.
3. Open the **FSL Service Resource** page layout to edit.
4. In the palette, click **Related Lists** element type.
5. Drag **Timesheets** into the Related Lists section of the layout, placing it in your preferred order.





- Click the properties icon on the Timesheet related list to open the configuration window.



- In the Selected Fields area, add the following fields:

- Timesheet Number
- Date
- Approval Status
- Approver
- Total

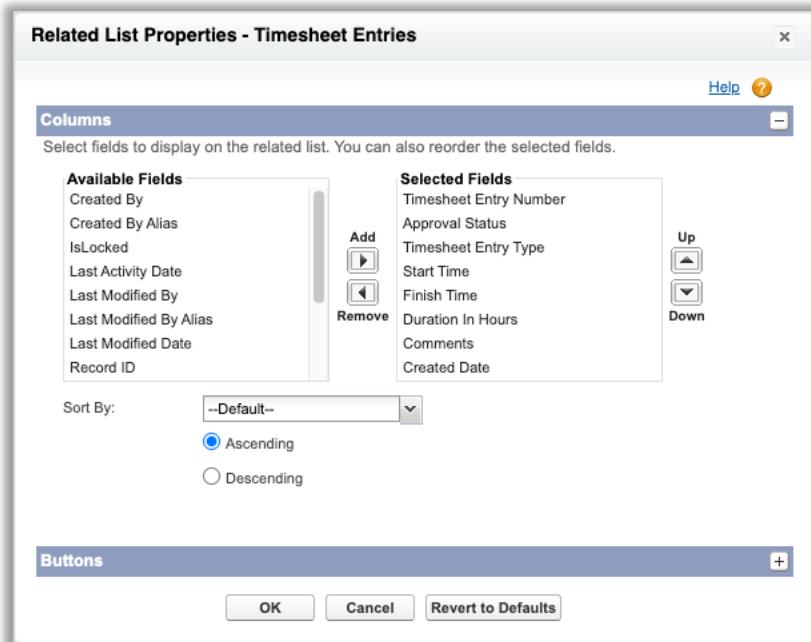
- Click **OK** to apply changes and then **Save** the page layout.

### Configure Timesheet Page Layout

A Timesheet record represents a daily timesheet, storing and tracking all associated Timesheet Entry records. This record is used to identify which daily timesheet each timesheet entry belongs to.

To help users view and access all the related timesheet entries and relevant details, customize the Timesheet Entries related list on the Timesheet page layout.

- From Setup, open Object Manager, and select **Timesheet**.
- Click **Page Layouts**.
- Open the **Timesheet Layout** page layout to edit.
- From the palette, click **Related Lists** element type.
- Click the properties icon on the Timesheet Entries related list. The related list configuration window opens.



6. Add the following fields to the Selected Fields area:

- Timesheet Entry Number
- Approval Status
- Timesheet Entry Type
- Start Time
- End Time
- Duration in Hours
- Timesheet Activity
- Service Appointment
- Resource Absence
- Comments

7. Click **OK** to store your customizations and then **Save** the page layout.

This configuration ensures supervisors can quickly review and manage time records associated with each Service Resource.

#### Add Approval History Related List to Timesheet Page Layout

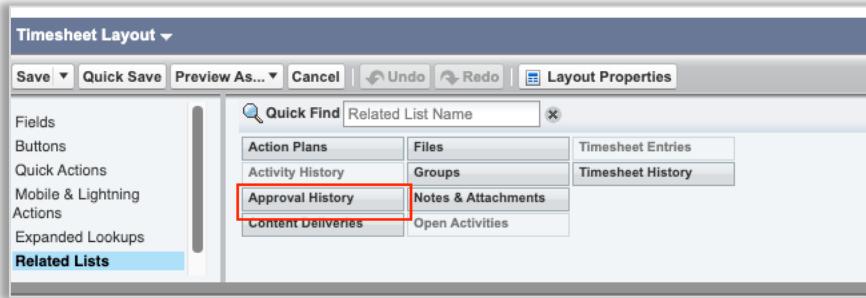
With the approval process for the Timesheet object installed, the Approval History related list must be added to the Timesheet Layout page layout. This provides users with visibility into the approval status and access to Approve and Reject actions.

To add the Approval History related list:

1. From Setup, open Object Manager, and select **Timesheet**.
2. Click **Page Layouts**.



3. Open the **Timesheet Layout** page layout to edit.
4. In the palette, select **Related Lists**, then drag **Approval History** to the Related Lists section of the page layout.



5. Click **Save** to apply the changes.

This ensures approvers and supervisors can view approval history and act directly from the Timesheet record.

#### Add Approve/Reject Entries Action to Timesheet Page Layout

The Approve/Reject Entries action is a screen flow that allows supervisors to selectively approve or reject individual Timesheet Entries directly from the parent Timesheet record. This action must be added to the page layout and configured to display conditionally based on the approval status.

**Important:**

- The flow **Timesheets: Select Individual Timesheet Entries to Approve or Reject** must be activated.
- Users must have the **Run Flows** permission through a permission set.
- The action should be conditionally displayed only when **Approval Status = Submitted**

#### Step 1: Activate the Screen Flow

1. From Setup, enter Flows in the Quick Find box, then select **Flows**.
2. Locate the flow named **Timesheets: Select Individual Timesheet Entries to Approve or Reject**.
3. Click the dropdown arrow next to the flow name and select **View Details and Versions**.
4. Click **Activate** next to the flow.

#### Step 2: Add Action to Page Layout

1. From Object Manager, click **Timesheet**.



2. Click **Page Layouts** and open the **Timesheet Layout** page layout.
3. In the layout editor, select **Mobile & Lightning Actions**.
4. Drag the Approve/Reject Entries action to the Salesforce Mobile and Lightning Experience Actions section.

The screenshot shows the Salesforce Setup interface for the Timesheet object. The left sidebar has a tree view with 'Page Layouts' selected. The main area shows the 'Mobile & Lightning Actions' section with a grid of actions. The 'Approve/Reject Entries' action is highlighted with a red border. Below it is the 'Salesforce Mobile and Lightning Experience Actions' section with buttons like Link, Delete, Change Record Type, and Edit. At the bottom, there's a 'Timesheet Detail' section with standard buttons like Edit, Delete, Clone, Change Owner, and a 'Submit for Approval' button.

5. Click **Save**.

### Step 3: Configure Action Visibility on the Lighting Record Page

1. Open a Timesheet record, click Setup and select **Edit Page**.



- In the Highlights Panel, click the Approve/Reject Entries action.

The screenshot shows the Lightning App Builder interface with the 'Timesheet Record Page' selected. The main area displays a Timesheet record with the following details:

- Timesheet Number: TS-00000003
- Date: 2024-08-05
- Approval Status: New
- Total: 0.00
- Created By: Mobile User, Last Modified By: User User

To the right, the 'Highlights Panel' is open, showing a filter configuration for 'Approval Status' set to 'Submitted'. The panel also lists other actions: Approve/Reject Entries, Delete, and Edit.

- Under Set Action Visibility, click **Add Filter**, and configure the following:

- Filter Type:** Record Field
- Field:** Approval Status
- Operator:** Equal
- Value:** Submitted

- Click **Done**.

- Activate and save the Lightning record page.

The action will now only display when the Timesheet record has an Approval Status of Submitted.

#### Step 4: Enable Run Flows Permissions to Supervisor Users

Supervisor users who will be reviewing and approving or rejecting Timesheets must be granted the Run Flows permission. This permission is required to execute the Approve/Reject Entries screen flow from the Timesheet record. It should be assigned through a permission set to all users responsible for managing timesheet approvals.

- From Setup, enter Permission Sets in the Quick Find box, and select **Permission Sets**.
- Open an existing permission set or click **New** to create one.

3. Click **App Permissions** and then click **Edit**.
4. Scroll down to the **Flow and Flow Orchestration** section and select **Run Flows**.

The screenshot shows the 'Permission Sets' page under 'SETUP'. A table lists various permissions under the 'Flow and Flow Orchestration' section. The 'Run Flows' permission is highlighted with a red border and a checked checkbox in the 'Enabled' column. The description for 'Run Flows' states: 'In this org, run any active flow. In Experience Builder sites, run any active flow that's distributed with the Flow Lightning component.'

Permission Name	Enabled	Description
Enable System Mode Flow Activation	<input type="checkbox"/>	Allows a user to activate system flows.
Manage Flow	<input type="checkbox"/>	Allow users to view, create, edit, delete, and activate all flows and flow types in Lightning Experience apps and Setup.
Manage Orchestration Runs	<input type="checkbox"/>	Cancel, debug, suspend, and resume orchestration runs.
Manage Orchestration Runs and Work Items	<input type="checkbox"/>	Cancel, debug, suspend, and resume orchestration runs and reassign orchestration work items.
Reassign Orchestration Work Items	<input type="checkbox"/>	Reassign orchestration work items.
<b>Run Flows</b>	<input checked="" type="checkbox"/>	In this org, run any active flow. In Experience Builder sites, run any active flow that's distributed with the Flow Lightning component.
View Flow Usage and Flow Event Data	<input type="checkbox"/>	Unsupported. Use the View Setup and Configuration permission to let users access flow usage data and flow standard platform event data.
View Orchestrations in Automation App	<input type="checkbox"/>	In Lightning Experience apps, allow users to view all orchestration runs, orchestration run-related details, and orchestration definitions, regardless of ownership or sharing settings. Only users who also have the Manage Flow permission can edit an orchestration definition or cancel, debug, suspend, or resume an orchestration run.

5. Click **Save**.
6. From the permission set, click **Manage Assignments**, click **Add Assignment**, and then select users to assign the permission set.

The Approve/Reject Entries action button will only be visible on Timesheet records for users who have the Run Flows permission assigned via a permission set and when the associated screen flow (*Timesheets: Select Individual Timesheet Entries to Approve or Reject*) is activated.

#### Add Global Action to Publisher Layout

After configuration and testing are complete, and once your mobile users are ready to begin using the Timesheet Management App, you must add the Timesheet Management Lightning Web Component as a global action to the appropriate Publisher Layout(s).

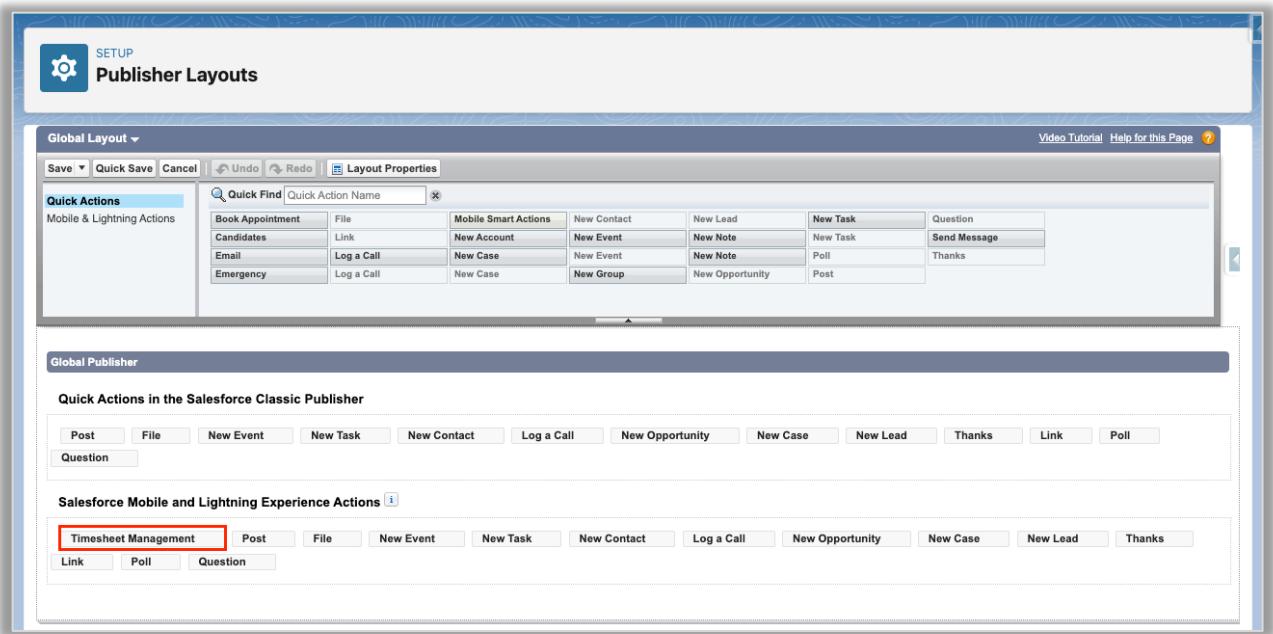
**NOTE:** Be sure to update only the Publisher Layouts assigned to Field Service mobile user profiles who will be accessing the Timesheet Management App.

To add the global action:

1. From Setup, enter Publisher Layouts in the Quick Find box, then select **Publisher Layouts**.
2. Click **Edit** next to the publisher layout assigned to your Field Service mobile app users.
3. In the layout editor, drag the **Timesheet Management** action into the Salesforce Mobile and Lightning Experience Actions section.



#### 4. Click **Save**.



The Timesheet Management action will now appear in the Actions menu of the Field Service mobile app for all users assigned to that publisher layout.



## Customize Timesheet Management App

The **TS Admin Setting** Custom Metadata Type allows you to control specific behaviors and interface settings for the **Timesheet Management App**. This flexibility supports both org-wide and profile-specific configurations.

By default, the **System Admin Settings** record is included with the SFS-X package. You may edit this record to apply settings globally or create additional records to customize the app for different user profiles.

Within each TS Admin Setting record, you can configure:

- Default days of the week to display in the weekly view.
- Number of weeks a technicians can navigate forward and backward.
- Custom labels for action buttons (Create, Submit, View)

### *Set Default Days to Display*

You can define which days of the week are shown in the Timesheet Management App using the Default Days to Display picklist. The available options are:

- Mon-Fri
- Sun-Sat
- Sat-Fri
- Mon-Sun

To configure the days to display:

1. From Setup, in the Quick Find box, enter custom metadata type and select **Custom Metadata Types**.



2. Click **Manage Records** for TS Admin Setting.

Action	Label	Installed Package	Namespace Prefix	Visibility	API Name	Record Size	Description
Manage Records	O2 Settings	FSL	FSL	Public	FSL__O2_Settings__mdt	406	
Manage Records	TS Admin Setting		diab_sfs_ext	Public	diab_sfs_ext__TSAdminSetting__mdt	980	General configurable properties for the Timesheet Management App
Manage Records	TS Approval Status UI Setting		diab_sfs_ext	Public	diab_sfs_ext__TSAccrualStatusUISetting__mdt	556	Allows users to store the UI settings for the different timesheet statuses.
Manage Records	TS Default Reviewer		diab_sfs_ext	Public	diab_sfs_ext__TSDefaultReviewer__mdt	269	
Manage Records	Times and Frequencies Configuration		diab_sfs_ext	Public	diab_sfs_ext__TimesandFrequenciesConfiguration__mdt	146	
Manage Records	Working Alone Timer Settings		diab_sfs_ext	Public	diab_sfs_ext__WorkingAloneTimer__mdt	816	

3. Click **Edit** next to the System Admin Settings record.

4. In the **Default Days to Display** field, select your preferred option from the list.

TS Admin Setting Edit		Save	Save & New	Cancel																																												
<b>Information</b> <table> <tr> <td>Create Button Label</td> <td><input type="text" value="Create"/></td> <td>Namespace Prefix</td> <td><input type="text" value="diab_sfs_ext"/></td> </tr> <tr> <td>Submit Button Label</td> <td><input type="text" value="Submit"/></td> <td>Timesheet Page Layout</td> <td><input type="text" value="Timesheet App Weekly V"/></td> </tr> <tr> <td>View Button Label</td> <td><input type="text" value="View"/></td> <td>Timesheet Entry List View Page Layout</td> <td><input type="text" value="Timesheet App Daily List"/></td> </tr> <tr> <td>Label</td> <td><input type="text" value="System Admin Settings"/></td> <td>Timesheet Entry Details View Page Layout</td> <td><input type="text" value="Timesheet App View Lay"/></td> </tr> <tr> <td>TS Admin Setting Name</td> <td><input type="text" value="System_Admin_Settings"/></td> <td>Timesheet Entry Edit View Page Layout</td> <td><input type="text" value="Timesheet App Edit Layc"/></td> </tr> <tr> <td>User Profile</td> <td><input type="text" value="System Administrator"/></td> <td>Timesheet Entry Create View Page Layout</td> <td><input type="text" value="Timesheet App Create Li"/></td> </tr> <tr> <td>Locked Status</td> <td><input checked="" type="radio" value="Submitted, Approved"/> Submitted, Approved</td> <td></td> <td></td> </tr> <tr> <td>Default Days to Display</td> <td><input checked="" type="checkbox"/> Mon-Fri</td> <td></td> <td></td> </tr> <tr> <td>View Number of Weeks Prior</td> <td><input type="text" value="Sun-Sat"/></td> <td></td> <td></td> </tr> <tr> <td>View Number of Weeks Following</td> <td><input type="text" value="Sat-Fri"/></td> <td></td> <td></td> </tr> <tr> <td></td> <td><input type="text" value="Mon-Sun"/></td> <td></td> <td></td> </tr> </table>					Create Button Label	<input type="text" value="Create"/>	Namespace Prefix	<input type="text" value="diab_sfs_ext"/>	Submit Button Label	<input type="text" value="Submit"/>	Timesheet Page Layout	<input type="text" value="Timesheet App Weekly V"/>	View Button Label	<input type="text" value="View"/>	Timesheet Entry List View Page Layout	<input type="text" value="Timesheet App Daily List"/>	Label	<input type="text" value="System Admin Settings"/>	Timesheet Entry Details View Page Layout	<input type="text" value="Timesheet App View Lay"/>	TS Admin Setting Name	<input type="text" value="System_Admin_Settings"/>	Timesheet Entry Edit View Page Layout	<input type="text" value="Timesheet App Edit Layc"/>	User Profile	<input type="text" value="System Administrator"/>	Timesheet Entry Create View Page Layout	<input type="text" value="Timesheet App Create Li"/>	Locked Status	<input checked="" type="radio" value="Submitted, Approved"/> Submitted, Approved			Default Days to Display	<input checked="" type="checkbox"/> Mon-Fri			View Number of Weeks Prior	<input type="text" value="Sun-Sat"/>			View Number of Weeks Following	<input type="text" value="Sat-Fri"/>				<input type="text" value="Mon-Sun"/>		
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Submit Button Label	<input type="text" value="Submit"/>	Timesheet Page Layout	<input type="text" value="Timesheet App Weekly V"/>																																													
View Button Label	<input type="text" value="View"/>	Timesheet Entry List View Page Layout	<input type="text" value="Timesheet App Daily List"/>																																													
Label	<input type="text" value="System Admin Settings"/>	Timesheet Entry Details View Page Layout	<input type="text" value="Timesheet App View Lay"/>																																													
TS Admin Setting Name	<input type="text" value="System_Admin_Settings"/>	Timesheet Entry Edit View Page Layout	<input type="text" value="Timesheet App Edit Layc"/>																																													
User Profile	<input type="text" value="System Administrator"/>	Timesheet Entry Create View Page Layout	<input type="text" value="Timesheet App Create Li"/>																																													
Locked Status	<input checked="" type="radio" value="Submitted, Approved"/> Submitted, Approved																																															
Default Days to Display	<input checked="" type="checkbox"/> Mon-Fri																																															
View Number of Weeks Prior	<input type="text" value="Sun-Sat"/>																																															
View Number of Weeks Following	<input type="text" value="Sat-Fri"/>																																															
	<input type="text" value="Mon-Sun"/>																																															
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>																																																

5. Click **Save**.

The selected day range determines which columns are shown in the technician's weekly view.

## Configure Number of Weeks to Navigate

The Timesheet Management App includes Prev Week and Next Week buttons for navigating across weeks. You can control how many weeks are accessible using two fields:

- View Number of Weeks Prior
- View Number of Weeks Following

To configure navigation limits:

1. From TS Admin Setting Custom Metadata Type, click **Edit** next to the System Admin Settings record.
2. Enter a numeric value for:
  - a. View Number of Weeks Prior
  - b. View Number of Weeks Following
3. Click **Save**.

The screenshot shows the 'Custom Metadata Types' setup interface. Under 'Information', there are several configuration fields. The 'View Number of Weeks Prior' field contains the value '3' and the 'View Number of Weeks Following' field contains the value '4'. Both of these fields are highlighted with a red border. Other visible fields include 'Create Button Label' (Create), 'Submit Button Label' (Submit), 'View Button Label' (View), 'Label' (System Admin Settings), 'TS Admin Setting Name' (System\_Admin\_Settings), 'User Profile' (System Administrator), 'Locked Status' (Submitted, Approved), 'Default Days to Display' (Mon-Fri), 'Namespace Prefix' (diab\_sfs\_ext), and various page layout references like 'Timesheet App Weekly' and 'Timesheet App Daily List'.

**NOTE:** Setting both values to 0 disables navigation, and only the current week will be visible.



## Customize Button Labels

You can override the default text for View, Create, and Submit buttons that appear on the Timesheet cards in the weekly view.

The screenshot shows the 'Custom Metadata Types' setup page. Under 'TS Admin Setting (Managed)', there is a note: 'This TS Admin Setting is managed, meaning you may only edit certain attributes. [Display More Information](#)'. The 'Information' section contains fields for 'Label' (set to 'System Admin Settings'), 'TS Admin Setting Name' (set to 'System Admin\_Settings'), 'Namespace Prefix' (set to 'diab\_sfs\_ext'), and several 'Timesheet Page Layout' options. The 'View Button Label' field is highlighted with a red box and contains the value 'View'. Other fields like 'Create Button Label' (Create) and 'Submit Button Label' (Submit) are also visible. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

To update button labels:

1. In the TS Admin Setting record, locate the fields:
  - a. Create Button Label
  - b. View Button Label
  - c. Submit Button Label
2. Enter your preferred label text for each.
3. Click **Save**.

Custom button labels will display the next time a user accesses the Timesheet Management App.



## Customize Fields for Timesheet Management App Views

The Timesheet Management App uses multiple page layouts on the Timesheet Entry object to control which fields appear in different parts of the Timesheet Management App. Customizing these layouts ensures technicians and supervisors see the most relevant information when logging, viewing, or editing time entries.

Below are the five page layouts used by the Timesheet Entry object and their purpose:

Page Layout	Purpose
<b>Timesheet App Create Layout</b>	Controls fields shown when creating a new timesheet entry.
<b>Timesheet App Edit Layout</b>	Controls fields shown when editing an existing entry.
<b>Timesheet App View Layout</b>	Controls fields displayed when viewing a submitted or approved entry.
<b>Timesheet App Daily List View Layout</b>	Defines columns shown in the daily list view within the weekly interface.
<b>Timesheet Entry Layout</b>	Standard layout used outside the mobile app context (e.g., desktop views).

To customize these layouts:

1. From Setup, go to Object Manager, then select **Timesheet Entry**.
2. Click **Page Layouts**.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Timesheet App Create Layout	Veronique Fugere, 2025-07-10, 11:58 a.m.	Veronique Fugere, 2025-07-10, 11:58 a.m.
Timesheet App Daily List View Layout	Veronique Fugere, 2025-07-10, 11:58 a.m.	Veronique Fugere, 2025-07-14, 1:55 p.m.
Timesheet App Edit Layout	Veronique Fugere, 2025-07-10, 11:58 a.m.	Veronique Fugere, 2025-07-10, 11:58 a.m.
Timesheet App View Layout	Veronique Fugere, 2025-07-10, 11:58 a.m.	Veronique Fugere, 2025-07-14, 1:55 p.m.
Timesheet Entry Layout	Veronique Fugere, 2025-07-10, 11:58 a.m.	Veronique Fugere, 2025-07-14, 1:55 p.m.

3. Open each relevant layout (as listed above) based on the area you want the fields to display.
4. In the layout editor, drag fields into the desired sections.
5. Click **Save** after making changes to each layout.



## Customize Fields in the Timesheet App Weekly View

The fields that display on the daily timesheet in the weekly view can be configured using the **Timesheet App Weekly View Layout** page layout located on the Timesheet object.

The image below shows the default configuration with Total and Timesheet Number fields available. You can add other fields such as Approver, Approval Status, Service Resource, or any other custom field to the page layout and the field and value will be available in daily Timesheet view the next time the app is accessed.

To configure the fields that are shown on the daily timesheet in the weekly view:

1. From Setup, go to Object Manager and select **Timesheet**.
2. Click **Page Layouts**.
3. Open the **Timesheet App Weekly View Layout** page layout.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Timesheet App Weekly View Layout	Gillian Florence, 2024-08-26, 8:58 a.m.	Gillian Florence, 2024-08-26, 8:59 a.m.
Timesheet Layout	Gillian Florence, 2024-08-26, 8:59 a.m.	Gillian Florence, 2024-08-26, 8:59 a.m.

4. Add or remove desired fields from the page layout and then **Save**.

The fields will display in the daily summary cards within the weekly view the next time users access the app.



**Timesheet Management**

X

PREV WEEK NEXT WEEK

Test Technician

MONDAY 2024-08-19	TUESDAY 2024-08-20	WEDNESDAY 2024-08-21
Total: 9 Timesheet Num... TS-00000042	Total: 4.5 Timesheet Num... TS-00000029	Total: 8.5 Timesheet Num... TS-00000043
<a href="#">View</a>	<a href="#">View</a>	<a href="#">View</a>
<a href="#">Create</a>	<a href="#">Create</a>	<a href="#">Create</a>
<a href="#">Submit</a>	<a href="#">Submit</a>	<a href="#">Submit</a>

### Configure Page Layouts in Custom Metadata Type

The **TS Admin Setting** custom metadata type controls which page layouts are used to render different areas of the Timesheet Management App. For each supported area of the app (e.g., weekly view, list view, create/edit/view forms), a specific field in the custom metadata record defines the associated Timesheet or Timesheet Entry page layout.

These references tell the app which layout (and therefore which fields) to use when rendering the UI for technicians or supervisors. This allows you to tailor the interface based on user profile or use case.

**NOTE:** The SFS-X package includes default layout mappings. You can modify them or create additional TS Admin Setting records to support different layouts for different profiles or user groups.

## Layout References

Field in TS Admin Setting	Associated Page Layout	Purpose
Timesheet Page Layout	<i>Timesheet App Weekly View Layout</i>	Controls fields shown in the weekly view daily summary
Timesheet Entry List View Page Layout	<i>Timesheet App Daily List View Layout</i>	Controls columns shown in the daily entry list
Timesheet Entry Create View Page Layout	<i>Timesheet App Create Layout</i>	Controls fields in the New Timesheet Entry form
Timesheet Entry Edit View Page Layout	<i>Timesheet App Edit Layout</i>	Controls fields in the Edit Timesheet Entry form
Timesheet Entry View Page Layout	<i>Timesheet App View Layout</i>	Controls fields in the Read-Only View of an entry

The screenshot shows the 'Custom Metadata Types' page in the Salesforce Setup. A specific record for 'System Admin Settings' is selected for editing. The 'Information' section contains fields like Label, TS Admin Setting Name, View Button Label, Create Button Label, Submit Button Label, User Profile, Locked Status, Default Days to Display, View Number of Weeks Prior, and View Number of Weeks Following. To the right, there's a 'Namespace Prefix' section with a table mapping page layouts to namespace prefixes. The 'Timesheet Page Layout' section is highlighted with a red box.

Namespace Prefix	Value
Timesheet Page Layout	Timesheet App Weekly \
Timesheet Entry List View Page Layout	Timesheet App Daily List \
Timesheet Entry Details View Page Layout	Timesheet App View Lay \
Timesheet Entry Edit View Page Layout	Timesheet App Edit Lay \
Timesheet Entry Create View Page Layout	Timesheet App Create Lay \

To update layout mappings:

- From Setup, enter Custom Metadata Types in the Quick Find box and select **Custom Metadata Types**.
- Click **Manage Records** next to TS Admin Setting.
- Click **Edit** next to an existing record (e.g., System Admin Settings) or click New to create a new record for another profile.



4. In each page layout field, type the corresponding layout you want to use for that view.

5. Click **Save**.

If your organization requires different fields for different user profiles, you can create multiple TS Admin Setting records, each targeting a specific profile, and assign layout mappings accordingly.

### Configure Weekly View with Icons and Colours Based on Status

Within the Timesheet Management App, header colours and Salesforce Lightning icons are used to represent the approval status of each timesheet in the weekly view for technicians. The following icons and colours are configured by default:

Approval Status	Icon	Header Colour
New		
Submitted		
Approved		
Rejected		

The image below shows the default configuration for the status header colours and icons.

Action	Timesheet Approval Status	Header Background Colour	Image	Is Bold	Header Text Colour
Edit	Approved	#45C65A	utility:approval	<input checked="" type="checkbox"/>	
Edit	New	#FF7F1F	utility:share	<input type="checkbox"/>	
Edit	Rejected	#FE8F7D	utility:cancel_file_request	<input checked="" type="checkbox"/>	
Edit	Submitted	#07388F	utility:clock	<input checked="" type="checkbox"/>	#FFF

If you want to change the icons that represent each status, the image used must be a Salesforce utility icon type found here: <https://www.lightningdesignsystem.com/icons/>

You can modify the default icons, header colour, and text colour using the **TS Approval Status UI Settings** Custom Metadata Type.

1. From Setup, in the Quick Find box, enter Custom Metadata Types, and select **Custom Metadata Types**.
2. Click **Manage Records** next to TS Approval Status UI Settings. The records for the configuration of each approval status are listed (Approved, New, Rejected, Submitted) with the default configuration.

Action	Timesheet Approval Status	Color	Image	Is Bold	Color
Edit   Del	Approved	#45C65A	utility:approval	<input checked="" type="checkbox"/>	
Edit   Del	New	#FF7F1F	utility:share	<input type="checkbox"/>	
Edit   Del	Rejected	#FE8F7D	utility:cancel_file_request	<input checked="" type="checkbox"/>	
Edit   Del	Submitted	#07388F	utility:clock	<input checked="" type="checkbox"/>	#FFF

3. Click **Edit** next to a Timesheet Approval Status record.
4. In the Image field, replace the name of the icon, e.g; utility:approval to the desired icon name.

**NOTE:** The format must be utility:icon name.

5. Enter a hex value in the Header Background Colour field to change the colour of the header background for the corresponding status.



6. Enter a hex value in the Header Text Colour field to change the colour of the header text colour. Ensure that the header background colour and text colour sufficiently contrast each other for optimal viewing.

**NOTE:** If the Header Text Colour value is empty, then black is the default.

The screenshot shows the 'Custom Metadata Types' setup screen with the 'TS Approval Status UI Setting' configuration. The 'Information' tab is selected, displaying the following fields:

Field	Value
Label	Submitted
TS Approval Status UI Setting Name	Submitted
Timesheet Approval Status	Submitted
Header Background Colour	#07388F
Header Text Colour	#FFF
Image	utility:clock
Is Bold	<input checked="" type="checkbox"/>

At the bottom of the configuration window, there are 'Save', 'Save & New', and 'Cancel' buttons.

7. Click **Save**.

Once the record is saved with a new image and header colours, the configuration will be shown on the daily timesheet for the respective approval status.



## Activate Flows

The flows listed in the table below are included with the SFS-X managed package and are installed in a deactivated state by default. Once your organization is ready to use the Timesheet Management workflows, you must manually activate the flows.

Flow Name	Type	Description
Timesheets: Automatic Creation of Timesheet Entries for Service Appointments	Record-Triggered Flow (After Save)	Creates a timesheet entry automatically when a Service Appointment status changes to an <i>In Progress</i> category.
Timesheets: Automatic Creation of Timesheet Entries for Resource Absences	Record-Triggered Flow (After Save)	Creates a timesheet entry when a new Resource Absence record is created.
Timesheets: Submit for Approval	Record-Triggered Flow (After Save)	Submits the Timesheet for approval to the assigned reviewer and updates the status of related entries.
Timesheets: Select Individual Timesheet Entries to Approve or Reject	Screen Flow	Enables reviewers to approve or reject individual Timesheet Entries within a daily Timesheet.
Timesheets: Update IsLocked in Timesheet Entry Record	Record-Triggered Flow (Before Save).	Sets the <i>IsLocked</i> checkbox on entries when a Timesheet is submitted or approved. Used by the app UI to control edit/view access.

## Using the Timesheet Web App

The Timesheet Web App provides a desktop-based version of the Timesheet Management interface, allowing administrators and testers to review, validate, and troubleshoot functionality without accessing the Field Service mobile app.

This tool is ideal for:

- Verifying layout and metadata configuration
- Testing automated time entry creation
- Troubleshooting issues in a controlled environment

The Timesheet Web App mirrors the mobile experience, allowing users to simulate technician workflows directly from a desktop browser.

Accessing the Timesheet Web App:

1. Click the **App Launcher**.
2. Type "timesheet" in the search field.
3. Click **Timesheet Web App** under Items to launch the interface.



## Considerations and Limitations

- **Timesheet Locked When Submitted**

Once a Timesheet is submitted for approval, it becomes locked. Technicians can no longer edit existing entries or add new ones.

- **Recall by Administrator Only**

Only a System Administrator can recall a submitted or approved Timesheet. This action resets the Timesheet and all associated Timesheet Entries to **New**, allowing the technician to make edits and re-submit.

- **Rejected Timesheet is Reopened for Editing**

If a Timesheet is rejected by the assigned Timesheet Reviewer, it is unlocked and editable. All related Timesheet Entries are also marked as **Rejected**, enabling the technician to update entries and resubmit.

- **Partial Rejection Handling**

The Timesheet Reviewer can use the **Approve/Reject Entries** screen flow to approve some entries while rejecting others. If any entry is rejected, the parent Timesheet status is set to **Rejected**, even if other entries are approved. This allows the technician to correct only the rejected entries before resubmitting.

- **Offline Usage and Sync Behaviour**

Timesheets can be used offline in the Field Service mobile app. Entries created offline will sync once the device is back online. However, **Duration** and **Total Hours** values are not calculated or updated until synchronization occurs.



## Time Rules Engine

The Time Rules Engine automates the classification of logged time by applying predefined thresholds to determine how hours are split across various Time Types—such as Regular, Overtime, Doubletime, or custom values defined by your organization. This automation reduces manual effort, increases consistency, and ensures compliance with your time-tracking policies.

Time Rules are organized into Time Rule Sets, which are assigned to Time Groups. These group-based assignments control when and for whom rules apply, based on effective date ranges and membership. Once an assignment becomes active, the associated rule set is locked to preserve historical integrity.

### Key Features

#### Automated Time Categorization

- Logged hours are automatically split across configured Time Types based on configured daily thresholds.

#### Supports Standard and Custom Time Tracking

- Compatible with Diabsolut Timesheet Management App, Salesforce standard objects, or other custom time-tracking solutions.

#### Scheduled Rule Activation

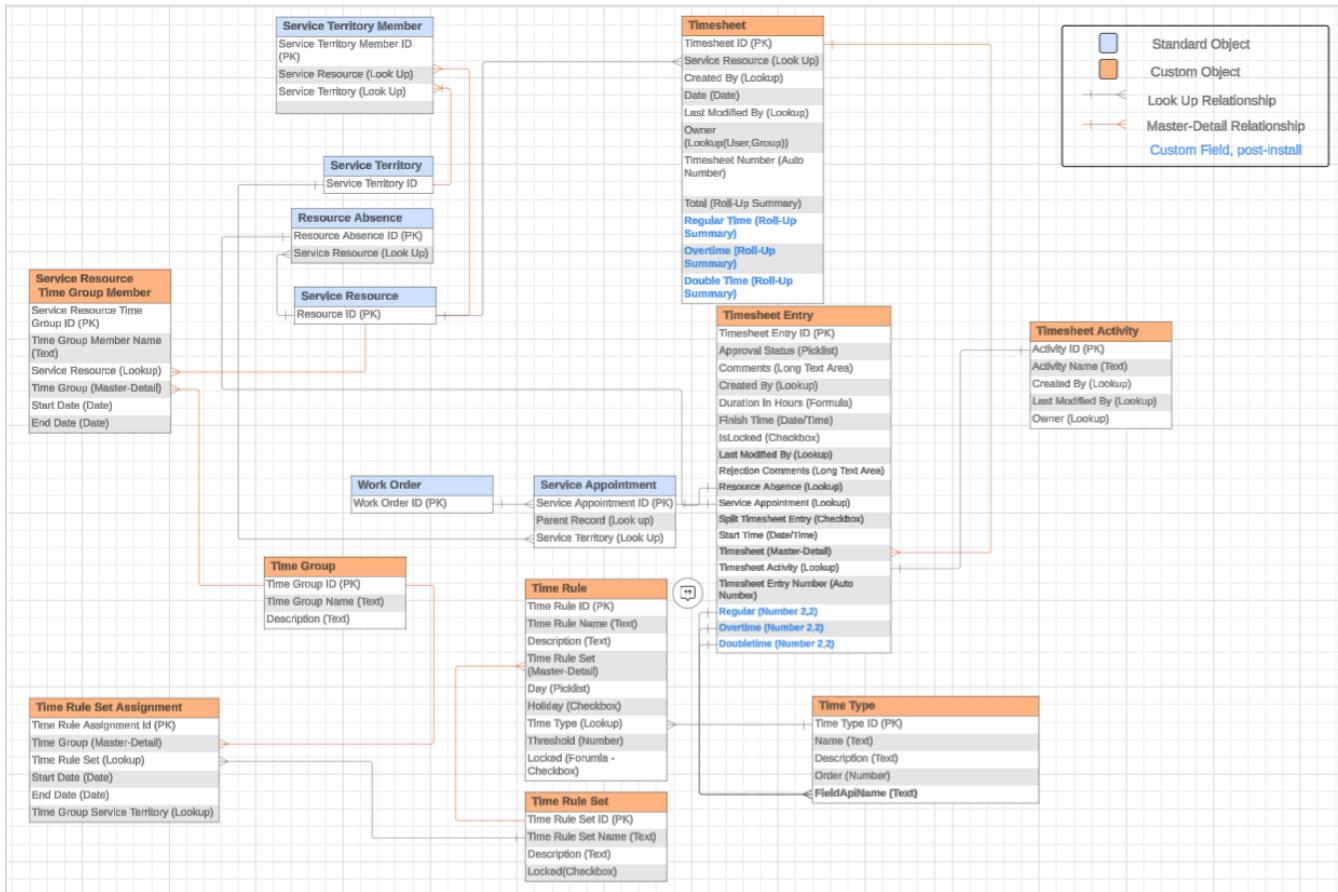
- Time Rule Sets are activated based on a defined start date, supporting future-dated assignments without manual intervention.

## Metadata

### Time Rules Engine Data Model

The Time Rules Engine relies on a set of custom objects that work together to determine how time is categorized for Service Resources. These relationships form the foundation of the logic that controls time classification across Regular, Overtime, Doubletime, and custom types.

Understanding how these objects relate is essential for anyone responsible for managing time compliance, rule configuration, and system behavior when logging and reviewing time.





Object	Purpose	Key Relationships
Time Group	Defines a group of Service Resources to which a set of Time Rules can be applied.	Linked to Service Resources via <b>Service Resource Time Group Member</b> . Assigned Time Rules via <b>Time Rule Set Assignment</b> .
Service Resource Time Group Member	Junction object that assigns a Service Resource to a Time Group for a specific time.	Connects <b>Service Resource</b> to <b>Time Group</b> (includes Start/End Date). Enables Time Rules for the service resource.
Time Rule Set Assignment	Assigns a Time Rule Set to a Time Group within a Service Territory for a defined time.	Junction object linking <b>Time Group</b> , <b>Time Rule Set</b> , and <b>Service Territory</b> . Triggers locking of the Time Rule Set when active.
Time Rule Set	A collection of Time Rules that define thresholds and conditions for time categorization.	Parent to one or more <b>Time Rule</b> records. Becomes locked when actively assigned.
Time Rule	Defines how time is categorized (e.g., Regular, Overtime) based on thresholds, day, and holiday status.	Child of <b>Time Rule Set</b> . Controls categorization logic for Time Sheet Entries.
Time Type	Defines the time categories (e.g., Regular, Overtime, Doubletime) used in Time Rules.	Referenced in <b>Time Rule</b> . Requires corresponding custom fields on Time Sheet Entry and Time Sheet objects.



## Custom Object: Time Group

A Time Group defines a collection of Service Resources to which a specific set of time categorization rules (Time Rules) can be applied.

### Key Considerations:

- A Service Resource must be linked to a Time Group using the **Service Resource Time Group Member** junction object for Time Rules to apply to entered time.
- If a Service Resource is not assigned to a Time Group, they can still log time as usual; however, no time rule logic will apply. Their Time Sheet Entries and Time Sheets will follow standard Salesforce Field Service behavior without automated categorization.

### Fields

Field Label	API Name	Data Type	Description	Required
Time Group Name	Name	Text (80)	The name of the Time Group	Yes
Description	Description__c	Text Area(255)	Description of Time Group	No

## Custom Object: Time Rule

A Time Rule defines how a portion of a Service Resource's work time should be categorized (e.g., Regular, Overtime, Doubletime) based on the day, time type, and cumulative thresholds. Each Time Rule is part of a parent Time Rule Set.

When creating a Time Rule, the following must be defined:

- Time Type (e.g., Regular, Overtime, Doubletime).
- A Threshold value, which represents the cumulative number of hours worked that this rule applies to.
- The Day of Week the rule applies to or select "Weekday" or "Weekend" for general application across multiple days.
- Whether the rule applies to a Holiday.

### Key Considerations:

- Each Time Rule must be linked to a Time Rule Set.
- Time Rules become locked once their Time Rule Set is assigned and active. Once this occurs, Time Rules/Time Rule Set cannot be modified or deleted.



- When both specific days and “Weekday” rules exist in the same set, the specific day rule takes precedence (e.g., use Day = Friday if Friday requires unique behavior).
- Thresholds are cumulative across Time Types. For example:
  - If a Regular Time Rule has a threshold of 8, then hours 0–8 will be categorized as Regular.
  - If an Overtime Time Rule has a threshold of 12, then hours 8–12 will be categorized as Overtime.
  - If a Doubletime Time Rule has a threshold of 24, then hours 12-24 will be categorized as Doubletime.

### Fields

Field Label	API Name	Data Type	Description	Configuration Options
Time Rule Name	Name	Text (80)	The name of the Time Rule	Required: Yes
Description	Description__c	Text Area (255)	Description text	Required: No
Day	Day__c	Picklist	Used to indicate which day the Time Rule is for. Weekday or Weekend may be used to apply the same rule to all weekdays or all weekend days.	<b>Picklist values:</b> Monday Tuesday Wednesday Thursday Friday Saturday Sunday Weekday Weekend
Holiday	Holiday__c	Checkbox	Used to indicate if the Time Rule is for a holiday.	Default value: False
Locked	Locked__c	Checkbox	Indicates if the Time Rule is Locked (true) or not (false). It is automatically set to true when Locked checkbox on the parent Time Rule Set is true. If set to true, the Time Rule cannot be modified or deleted.	<b>Formula:</b> <code>Time_Rule_Set__r.Locked__c = true</code>



Time Type	Time_Type__c	Lookup(Time Type)	Identifies the Time Type for the Time Rule.	<b>Lookup Options:</b> Don't allow deletion of the lookup record that's part of a lookup relationship.  <b>Lookup Filter:</b> Filter Criteria: Time Type: Active equals True  Filter Type Required. The user-entered value must match filter criteria.  <b>Error Message:</b> Only active Time Types can be selected.
Threshold	Threshold__c	Number(2,2)	Used to indicate the maximum number of hours for the Time Type specified for the Time Rule.	Required: Yes
Time Rule Set	Time_Rule_Set__c	Master-Detail(Time Rule)	The parent Time Rule Set tied to the Time Rule.	<b>Required:</b> Yes <b>Allow reparenting:</b> False

## Validation Rule

### Time Rule Validation Rule

[Back to Time Rule](#)

#### Validation Rule Detail

[Edit](#) [Clone](#)

Active

Error Location Top of Page

Rule Name	Prevents_edit_when_Time_Rule_is_locked	Active	<input checked="" type="checkbox"/>
Namespace Prefix	diab_sfs_ext	Error Location	Top of Page
Error Condition Formula	AND( NOT(ISNEW()), diab_sfs_ext_Time_Rule_Set__r.diab_sfs_ext_Locked__c = TRUE )		
Error Message	You cannot edit a locked Time Rule. This Time Rule is locked because it is associated with a Time Rule Set that is assigned to a Time Group and is active.		
Description	Validation rule to prevent edits to a Time Rule when it is associated with a Time Rule Set that is assigned and active.	Modified By	User User, 2025-05-01, 11:30 a.m.
Created By	User User, 2025-05-01, 11:30 a.m.		

[Edit](#) [Clone](#)



## Custom Object: Time Rule Set

A Time Rule Set is a container for one or more Time Rules that define how time should be categorized (e.g., Regular, Overtime, Doubletime) for Service Resources. It is assigned to a Time Group through a Time Rule Set Assignment.

### Key Considerations:

- When a Time Rule Set is assigned to a Time Group and the assignment is active based on date criteria, the Locked field is automatically set to TRUE via automation.
- Once locked, the Time Rule Set cannot be modified—Time Rules cannot be added, edited, or removed.
- To make changes, a new Time Rule Set must be created and assigned.

### Fields

Field Label	API Name	Data Type	Description	
Time Rule Set Name	Name	Text(80)	The name of the Time Rule Set	Required: Yes
Description	Description__c	Text Area (255)	Used to capture details of the Time Rule Set.	Required: No
Locked	Locked__c	Checkbox	Used to indicate if the Time Rule Set is locked.	Required: n/a

### Validation Rule

#### Time Rule Set Validation Rule

[Back to Time Rule Set](#)

Validation Rule Detail		<a href="#">Edit</a>	<a href="#">Clone</a>
Rule Name	Prevents_Changing_Locked_to_False	Active	<input checked="" type="checkbox"/>
Namespace Prefix	diab_sfs_ext	Error Location	Top of Page
Error Condition Formula	AND( ISCHANGED(diab_sfs_ext__Locked__c), PRIORVALUE(diab_sfs_ext__Locked__c) = TRUE )		
Error Message	A Time Rule Set cannot be unlocked.		
Description	Prevents users from changing Locked checkbox field from true to false. A flow sets the Locked field to true once the Time Rule Set is assigned and active.		
Created By	<a href="#">User User</a> , 2025-05-01, 11:30 a.m.	Modified By	<a href="#">User User</a> , 2025-05-01, 11:30 a.m.
		<a href="#">Edit</a>	<a href="#">Clone</a>



## Custom Object: Time Rule Set Assignment

A Time Rule Set Assignment is a junction object that links a Time Rule Set to a Time Group for a specific time and location. This determines when and where a set of time rules should apply to Service Resources.

### Key Considerations:

- Each assignment must include a Start Date, with an optional End Date to define its active period.
- A Service Resource receives the assigned Time Rule Set through their membership in the associated Time Group.
- A Service Territory must be specified for each assignment. The Operating Hours Holidays linked to that territory determine when holiday-specific rules apply within the assigned Time Rule Set.

### Fields

Field Label	API Name	Data Type	Description	Configuration Options
Time Rule Set Assignment Name	Name	Auto Number Display format: TRSA-{000000}	The name of the Time Rule Set	Required: Yes
End Date	End_Date__c	Date	Used to indicate the end of the time rule set assignment.	Required: No
Start Date	Start_Date__c	Date	Used to indicate the start of the time rule set assignment.	Required: Yes
Time Group	Time_Group__c	Master-Detail(Time Group)	The Time Group which is being assigned the Time Rule Set	Required: Yes
Time Rule Set	Time_Rule_Set__c	Lookup(Time Rule Set)	The Time Rule Set assigned to the Time Group.	Required: Yes
Time Group Service Territory	Time_Group_Service_Territory__c	Lookup(Service Territory)	The Service Territory assigned to the Time Rule Set.	Required: Yes



## Custom Object: Service Resource Time Group Member

This is a junction object that links a Service Resource to a Time Group for a defined time. It determines when Time Rules should apply to the resource's time entries.

### Key Considerations:

- Each record must include a Start Date, with an optional End Date to define the duration of the association.
- When the assignment expires and the Service Resource is not part of any other Time Group, they can continue logging time, but Time Rules will no longer apply.
- This time-based membership ensures that Time Rules are only enforced during specific periods, allowing for flexible time rule management across projects, shifts, or seasonal roles.

### Fields

Field Label	API Name	Data Type	Description	
Time Group Member Name	Name	Text(80)	The name of the Time Group Member	Required: Yes
End Date	End_Date__c	Date	The end date for the Time Group membership.	Required: No
Start Date	Start_Date__c	Date	The start date for the Time Group membership.	Required: Yes
Service Resource	Service_Resource__c	Lookup (Service Resource)	Indicates the Service Resource that belongs to the Time Group.	Required: Yes
Time Group	Time_Group__c	Master-Detail(Time Group)	The Time Group to which the Service Resource is assigned.	Required: Yes



## Custom Object: Time Type

The Time Type object defines the categories of time your organization uses for reporting and payroll purposes—such as Regular, Overtime, or Doubletime. Each Time Type record represents one category that can be referenced in Time Rules.

### Key Considerations:

- A Time Type record must be created for every time category you plan to use in your Time Rules configuration.
- For each Time Type, a corresponding custom field must be created on both the Time Sheet Entry object and the Time Sheet object to store calculated durations.

Refer to [Create Custom Fields for Time Sheet Entry Object](#)

### Fields

Field Label	API Name	Data Type	Description	Options
Time Type Name	Name	Text(80)	The name of the time type.	Required: Yes
Active	Active__c	Checkbox	Used to set if the time type is active. Only active time types can be used in a time rule.	
FieldAPIName	FieldAPIName__c	Text(80)	Used to capture the API name of the corresponding time type field on the Time Sheet Entry object.	Required: Yes
Order	Order__c	Number(2,0)	The order that the threshold is applied by time type within a time rule set.	Required: Yes Unique: Yes



## Flows

The Time Rules feature includes flows designed to automate, protect, and optimize time tracking. It is recommended to test all flows in a sandbox environment before activating in production.

The following flows are included as part of the Time Rules feature. All flows are installed in an inactive state.

Flow Name	Purpose	Triggering Object	Type
Time Rules: Clone Time Rule Set	Duplicate a Time Rule Set and its Time Rules.	N/A	Screen Flow
Time Rules: Lock Time Rule Set When Assigned to Time Group – Record Triggered	Lock Time Rule Set when an assignment is active.	Time Rule Set Assignment	Record-Triggered After Save
Time Rules: Lock Time Rule Set When Assigned to Time Group – Schedule Triggered	Lock Time Rule Set daily for future-dated assignments.	N/A	Scheduled Daily
Time Rules: Prevent Deletion of Time Type Records	Prevent users from deleting Time Type records.	Time Type	Record-Triggered Before Delete
Time Rules: Prevent Deletion of Time Rule Records When Locked	Prevent deletion of locked Time Rule records.	Time Rule	Record-Triggered Before Delete
Time Rules: Prevent Deletion of Time Rule Set Assignment Records When Active or Expired	Prevent deletion of active/expired assignments.	Time Rule Set Assignment	Record-Triggered Before Delete
Time Rules: Subflow Split Time Sheet Entries by Time Type	Core logic for calculating and distributing time splits by category. Called by Create, Update, and Delete flows.	Time Sheet Entry (Standard)	Subflow
Time Rules: Trigger Split on Create	Splits new entry and recalculates time categories for all entries on the same day.	Time Sheet Entry (Standard)	Record-Triggered After Save
Time Rules: Trigger Split on Delete	Recalculates time splits for remaining entries after one is deleted.	Time Sheet Entry (Standard)	Record-Triggered Before Delete
Time Rules: Trigger Split on Update	Recalculates time splits when a Time Sheet Entry is modified.	Time Sheet Entry (Standard)	Record-Triggered After Save
Time Rules: Subflow SFS-X Split Time Sheet Entries by Time Type	SFS-X-specific core logic for splitting entries by time category. Called by Create, Update, and Delete triggers.	Timesheet Entry (SFS-X)	Subflow
Time Rules: Trigger SFS-X Split on Create	Splits new SFS-X Timesheet Entry and recalculates all daily entries for accurate time distribution.	Timesheet Entry (SFS-X)	Record-Triggered After Save



Time Rules: Trigger SFS-X Split on Delete	Adjust SFS-X splits on deletion.	Timesheet Entry (SFS-X)	Record-Triggered Before Delete
Time Rules: Trigger SFS-X Split on Update	Triggers recalculation of time categories for all entries for a Service Resource on day after a change.	Timesheet Entry (SFS-X)	Record-Triggered After Save

## Lightning App

The **SFS-X Time Rules Manager** Lightning App is included with the installation of the SFS-X managed package.

This app includes the following navigation items for easy access to the tabs required to configure and manage Time Rules for your organization.

- Time Groups
- Service Resource Time Group Members
- Time Rule Sets
- Time Rules
- Time Rule Set Assignments

The **Diab – Time Rules for Time Rules Manager** permission set is provided and includes access to this app in the Assigned Apps permission. Assign this permission set to users who need to configure and manage Time Rules.

The screenshot shows the Lightning App Builder interface with the following details:

- Header:** Includes back, forward, and search buttons, followed by "Lightning App Builder", "App Settings", "Pages", and "SFS-X Time Rules Manager". A help icon is also present.
- Left Sidebar:** Titled "App Settings" and "Navigation Items". It lists "App Details & Branding", "App Options", and "Utility Items (Desktop Only)". Under "Navigation Items", it lists "User Profiles".
- Main Content Area:**
  - Available Items:** A list of items with icons and names: Accounts, Alerts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Bundle Configs, Appointment Bundle Policies, Case, Contact, Lead, Opportunity, Product, Record Type, Report, Task, User, and Workcenter.
  - Selected Items:** A list of items currently assigned to the app, each with a star icon and name: Time Groups, Service Resource Time Group Members, Time Rule Sets, Time Rules, and Time Rule Set Assignments.
  - Buttons:** Navigation buttons between the Available and Selected lists, and up/down arrows for reordering the selected items.



## Configuration

To enable and use the Time Rules Engine, complete the following configuration steps. These tasks ensure time can be accurately categorized, stored, and managed across the organization.

- [Create Custom Time Type Fields](#)

Create custom number fields on the relevant Timesheet Entry object:

- If using Salesforce standard time sheets, add the fields to the Time Sheet Entry object.
- If using SFS-X Timesheet Management, add the fields to the Timesheet Entry object.

Each field will store the total minutes logged per time category.

- [Create Time Type Records](#)

For each custom time category, create a corresponding Time Type record. These records map to the fields you created and define the labels used in the UI and rule logic.

- [Assign Permission Set to Technician Users](#)

Assign the provided permission set to all technician users (Service Resources) whose logged time will be processed by the Time Rules Engine. This grants the necessary access to the categorized time fields and automation processes.

- [Assign Permission Set to Time Rules Managers](#)

Assign the provided permission set to users responsible for creating and managing Time Groups, Time Rules, and Assignments, typically HR, payroll, or admins.

- [Create Permission Set for Access to Custom Fields](#)

Create a custom permission set to grant visibility and edit access to the custom time type fields you created in the first step. Assign this permission set to technician and time rules manager users.

- [Activate Flows](#)

The Time Rules Engine includes supporting Flows that are deployed inactive by default. Navigate to Flows, locate the Time Rules flows, and activate those that are relevant to your configuration.



## Create Custom Time Type Fields

Custom fields must be created to store the categorized time output from the Time Rules Engine. The setup differs depending on whether your organization uses Salesforce standard Time Sheet objects or the SFS-X Timesheet objects.

Each Time Type (e.g., Regular, Overtime, Doubletime) must have a corresponding number field to store calculated time.

### *Create Fields for Salesforce Time Sheet Entry (Standard Object Model)*

Time is stored in minutes, so custom fields must be created as number fields with zero decimal places.

1. From Setup, click **Object Manager** and open Time Sheet Entry object.
2. Click **Fields & Relationships**.
3. Click **New**.
4. Select **Number** as the data type and click **Next**.
5. Enter a **Field Label** (e.g., *Regular*).
6. Set:
  - **Length** = 4 (digits to the left of the decimal)
  - **Decimal Places** = 0 (digits to the right of the decimal).
7. Keep the auto-populated Field Name and click **Next**.

NOTE: This Field Name value must be entered in the **FieldAPIName** of the corresponding **Time Type** record.

8. Configure the field-level security as needed, then click **Next**.
9. Click **Save & New** to add additional fields. Repeat these steps to create a field for each category of time e.g. Overtime, Doubletime.



## Create Fields for SFS-X Timesheet Entry

Time is stored in hours; therefore, custom number fields must support decimal values. Use the same process with a slight variation in decimal settings.

1. From Setup, go to **Object Manager** and select **Timesheet Entry**.
2. Click **Fields & Relationships**.
3. Click **New**.
4. Choose **Number** as the data type and click **Next**.
5. Enter a Field Label (e.g., Regular).
6. Set:
  - **Length** = 2
  - **Decimal Places** = 2
7. Use the default Field Name, configure Field-Level Security, and click **Next**.
8. On the Add to page layouts screen, select which layouts should include this field.

Do not include the field on:

- Timesheet App Create Layout
- Timesheet App Edit Layout

Include this field on:

- Timesheet App View Layout
- Timesheet App Daily List View Layout
- Timesheet Entry Layout (for supervisor/admin purposes)

**NOTE:** Excluding the field from the Create and Edit layouts prevents technicians from manually entering or modifying categorized time. These values are calculated automatically by the Time Rules Engine and should remain system-controlled.



Timesheet Entry  
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Overtime  
Data Type: Number  
Field Name: Overtime  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name

<input type="checkbox"/>	Timesheet App Create Layout
<input checked="" type="checkbox"/>	Timesheet App Daily List View Layout
<input type="checkbox"/>	Timesheet App Edit Layout
<input checked="" type="checkbox"/>	Timesheet App View Layout
<input checked="" type="checkbox"/>	Timesheet Entry Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

- Click **Save & New** to create additional fields or **Save** to finish.

#### *Create Roll-Up Summary Fields on Time Sheet or Timesheet Object*

To display total categorized time across all related entries, you must create Roll-Up Summary fields, but only on the object used by your organization:

- If using Salesforce standard Time Sheet, create fields on the Time Sheet object.
- If using SFS-X Timesheet, create fields on the Timesheet object.

Do not create roll-up fields on both objects. Configure only the object relevant to your deployment.

- From Setup, click Object Manager and open **Time Sheet** (Salesforce standard object model) or **Timesheet** (SFS-X object model).
- Click **Fields & Relationships**.
- Click **New**.
- Choose **Roll-Up Summary** as the data type and click **Next**.
- Enter a Field Label, e.g. Regular Time Roll-Up. Keep default for Field Name and click **Next**.
- For **Summarized Object**, select either:



- **Time Sheet Entries** (for Time Sheet), or
  - **Timesheet Entries** (for Timesheet).
7. Set:
- **Roll-Up Type** = SUM
  - **Field to Aggregate** = your custom time type field (e.g., Regular)
  - **Filter Criteria** = All records should be included in the calculation.

The screenshot shows the 'New Custom Field' configuration interface. At the top, it says 'Time Sheet' and 'New Custom Field'. Below that, it says 'Step 3. Define the summary calculation'. Under 'Select Object to Summarize', the 'Master Object' is 'Time Sheet' and the 'Summarized Object' is 'Time Sheet Entries'. In the 'Select Roll-Up Type' section, 'SUM' is selected. The 'Field to Aggregate' dropdown is set to 'Regular'. In the 'Filter Criteria' section, 'All records should be included in the calculation' is selected.

8. Click **Next**.
9. Configure field-level security: Uncheck all profiles, except System Administrator for access to this field and then click **Next**.

**NOTE:** Access to fields will be granted through a custom permission set.  
Refer to: [Create Permission Set for Access to Custom Fields](#)

10. Assign page layouts that should include this field.

**NOTE:** For the Timesheet object, be sure to select the **Timesheet App Weekly View Layout**. This ensures that the roll-up field is visible in the technician's daily view within the Timesheet Management App.

11. Click **Save & New**.
12. Repeat the steps to create a roll-up summary field for each additional time type. E.g. Overtime, Doubletime.



### *Create Formula Fields for Hour Conversion for Time Sheet Object*

For Salesforce standard Time Sheet object, create Formula fields to convert roll-up values from minutes to hours.

This step is not required for SFS-X Timesheet object.

1. From Setup, click **Object Manager** and open Time Sheet object.
2. Click **Fields & Relationships**.
3. Click **New**.
4. Choose **Formula** as the data type, then click **Next**.
5. Enter a Field Label, e.g. Regular Total Hours. Keep default for Field Name.
6. Set **Formula Return Type** = Number, with **Decimal Places** = 2,
7. Click **Next**.
8. Create the formula:
  - a. Click **Insert Merge Field** drop-down and select Regular Time Roll Up from the Time Sheet object.
  - b. Click in the editor and insert the divide operator and then 60.The formula should be: `Regular_Time_Roll_Up__c / 60`
- c. Click **Next**.
9. Configure field-level security: Uncheck all profiles, except System Administrator for access to this field, then click **Next**.
10. Select page layouts and then click **Save & New**.



11. Repeat the steps for all roll-up fields that need to be converted from minutes to hours.

The screenshot shows the Salesforce Object Manager interface for the 'Time Sheet' object. The left sidebar lists various setup categories like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Fields & Relationships' and shows a table of 18 items, sorted by Field Name. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Three specific rows are highlighted with a red box: 'Total Duration (In Hours)' with field name 'TotalDurationInHours' and type 'Formula (Number)'; 'Total Regular Time (In Hours)' with field name 'Total\_Regular\_Time\_In\_Hours\_\_c' and type 'Formula (Number)'; and 'Total Overtime (In Hours)' with field name 'Total\_Overtime\_In\_Hours\_\_c' and type 'Formula (Number)'. Below these, other fields listed include 'Total Doubletime (In Hours)' with field name 'Total\_Doubletime\_In\_Hours\_\_c' and type 'Formula (Number)', 'Name' with field name 'TimeSheetNumber' and type 'Auto Number', and 'Time Sheet Entry Count' with field name 'TimeSheetEntryCount' and type 'Roll-Up Summary (COUNT Time Sheet Entry)'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Total Duration (In Hours)	TotalDurationInHours	Formula (Number)		
Total Regular Time (In Hours)	Total_Regular_Time_In_Hours__c	Formula (Number)		
Total Overtime (In Hours)	Total_Overtime_In_Hours__c	Formula (Number)		
Total Doubletime (In Hours)	Total_Doubletime_In_Hours__c	Formula (Number)		
Name	TimeSheetNumber	Auto Number		
Time Sheet Entry Count	TimeSheetEntryCount	Roll-Up Summary (COUNT Time Sheet Entry)		



## Create Time Type Records

Once your time type categories and corresponding custom fields have been created on the Time Sheet Entry or Timesheet Entry object, you must create corresponding Time Type records.

These records define each time category (e.g., Regular, Overtime, Doubletime) and map directly to the custom fields you created.

A Time Type record must be specified when creating a Time Rule.

1. Navigate to **Time Types** tab.
2. Click **New**.
3. In the New Time Type form, enter a **Time Type Name**, e.g. Regular.
4. Enter a numerical value for **Order**.  
This value specifies the sequence for applying each time type within a Time Rule Set for the same day. The value must be unique.
5. **FieldAPIName** field: Enter the API name (Field Name) of the corresponding custom field on the Time Sheet Entry or Timesheet Entry object.  
For example: Regular\_\_c, Overtime\_\_c, or Doubletime\_\_c

Information	
* Time Type Name	Regular
* Order	1
FieldAPIName	Regular__c
Owner Gillian Florence	
<input checked="" type="checkbox"/> Active	
<input type="button" value="Cancel"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Save"/>	

6. **Active:** Check this box to make the Time Type available for use in Time Rules.
7. Click **Save** or **Save & New** to continue creating more records.
8. Repeat steps to create a Time Type record for each time category that matches the custom fields configured on Time Sheet Entry or Timesheet Entry object.



Time Types						
	<input type="checkbox"/> Time Type Name	Order ↑	FieldAPIName	Active		
1	<input type="checkbox"/> Regular	1	Regular__c	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>	
2	<input type="checkbox"/> Overtime	2	Overtime__c	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>	
3	<input type="checkbox"/> Doubletime	3	Doubletime__c	<input checked="" type="checkbox"/>	<input type="button" value="▼"/>	



## Assign Permission Set to Technician Users

The **Diab - Time Rules for Technicians** permission set is included with the installation. This permission set must be assigned to technician Service Resources who will be added as members of Time Groups to ensure that Time Rules are applied to their timesheet entries.

**Technicians will not see or interact with Time Rule records directly.**

Even with this permission set, access to Time Rule objects remains restricted. The organization-wide defaults are set to Private for all related objects, meaning technicians cannot view, edit, or report on these records. Their access is strictly limited to enabling the backend automation required for Time Rule processing.

The table below summarizes the **Diab – Time Rules for Technicians** permission set.

Permission Set Category	Enabled Permissions
Object Settings for <b>Time Type</b>	Object Permissions: Read  Field Permissions: <ul style="list-style-type: none"><li>• Read access to: Active</li></ul>
Object Settings for <b>Time Group</b>	Object Permissions: Read
Object Settings for <b>Time Rule</b>	Object Permissions: Read  Field Permissions: <ul style="list-style-type: none"><li>• Read access to: Holiday, Locked</li></ul>
Object Settings for <b>Time Rule Set</b>	Object Permissions: Read  Field Permissions: <ul style="list-style-type: none"><li>• Read access to: Locked</li></ul>
Object Settings for Time Rule Set Assignment	Object Permissions: Read  Field Permissions: <ul style="list-style-type: none"><li>• Read access to: End Date</li></ul>
Object Settings for Service Resource Time Group Member	Object Permissions: Read  Field Permissions: <ul style="list-style-type: none"><li>• Read access to: End Date, Service Resource</li></ul>



## Create Custom Permission Set for Technicians for Time Rules Access

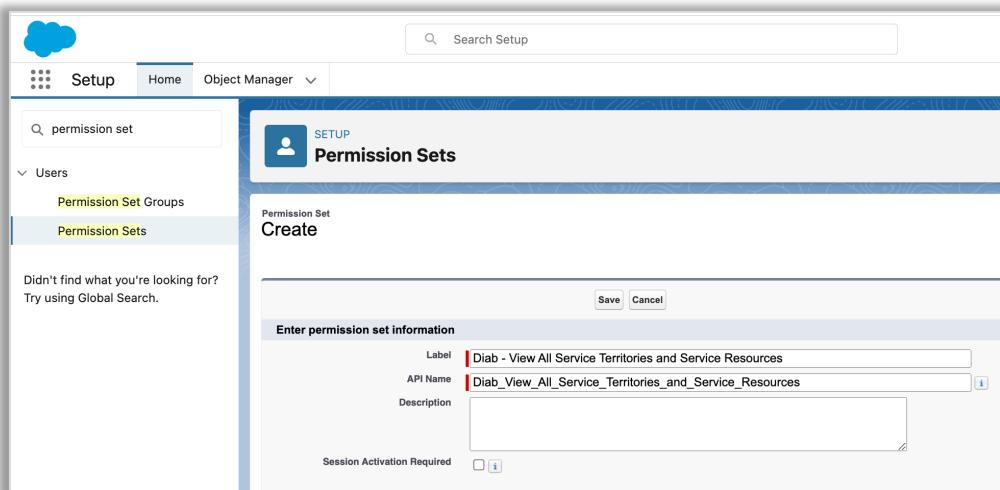
To support the Time Rules Engine functionality, technicians must be granted access to specific standard objects that are used in time-splitting logic.

These objects are referenced in Time Rule Set Assignments and are necessary for backend calculations of categorized time (e.g., Regular, Overtime, Doubletime).

Because these are standard objects, their access cannot be included in the managed package. You must manually create and assign a custom permission set to technician users to ensure accurate rule evaluation.

To create the custom permission set:

1. From Setup, in the Quick Find box, enter Permission Sets, and then select **Permission Sets**.
2. Click **New**.
3. In the Create Permission Set window, enter permission set information.  
e.g. Label: Diab – View All Service Territories and Service Resources and then click **Save**.



4. After saving, go to **Object Settings**, then configure the following:
  - a. **Service Resources**: enable View All Records
  - b. Service Territories: enable View All Records

### c. Operating Hours: enable View All Records

The screenshots illustrate the configuration of Object Permissions for three different objects:

- Service Territories:** Under Object Permissions, the "View All Records" permission is checked and highlighted with a red border.
- Service Resources:** Under Object Permissions, the "View All Records" permission is checked and highlighted with a red border.
- Operating Hours:** Under Object Permissions, the "View All Records" permission is checked and highlighted with a red border.

- Once object permissions are configured, click **Manage Assignments** and assign the permission set to technician users who will log time affected by Time Rules.



## Assign Permission Set to Time Rules Manager

The **Diab – Time Rules for Time Rules Manager** permission set is included with the SFS-X managed package. It must be assigned to users who are responsible for configuring and managing Time Rules, typically HR, payroll, or operations personnel who oversee compliance with time-tracking policies and labor regulations.

This permission set provides access to all objects and settings required to define and maintain Time Rules, Time Rule Sets, and related assignments.

The table below summarizes the object-level access granted by this permission set:

Permission Set Category	Enabled Permissions
Assigned Apps	SFS-X Time Rules for Time Rules Manager
App Permissions	<p>Run Flows</p> <ul style="list-style-type: none"> <li>• User requires this permission to be able to access and run the <b>Clone Rule Set</b> screen flow quick action.</li> </ul>
Object Settings for <b>Time Type</b>	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>• Visible</li> </ul> <p>Object Permissions:</p> <ul style="list-style-type: none"> <li>• Read, Create, Edit, Delete, View All, Modify All</li> </ul> <p>Field Permissions:</p> <ul style="list-style-type: none"> <li>• Edit access to:           <ul style="list-style-type: none"> <li>○ Active</li> <li>○ Description</li> <li>○ FieldNameAPI</li> </ul> </li> </ul>
Object Settings for <b>Time Group</b>	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>• Visible</li> </ul> <p>Object Permissions:</p> <ul style="list-style-type: none"> <li>• Read, Create, Edit, Delete, View All, Modify All</li> </ul> <p>Field Permissions:</p> <ul style="list-style-type: none"> <li>• Edit access to: Description</li> </ul>
Object Settings for <b>Time Rule</b>	Tab Settings:



	<ul style="list-style-type: none"> <li>Visible</li> </ul> <p>Object permissions:</p> <ul style="list-style-type: none"> <li>Read, Create, Edit, Delete, View All, Modify All</li> </ul> <p>Field Permissions:</p> <ul style="list-style-type: none"> <li>Edit access to:           <ul style="list-style-type: none"> <li>Day</li> <li>Description</li> <li>Holiday</li> <li>Threshold</li> <li>Time Type</li> <li>Time Rule Set</li> </ul> </li> </ul>
Object Settings for <b>Time Rule Set</b>	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>Visible</li> </ul> <p>Object permissions:</p> <ul style="list-style-type: none"> <li>Read, Create, Edit, Delete, View All, Modify All</li> </ul> <p>Field Permissions:</p> <ul style="list-style-type: none"> <li>Edit access to: Description</li> <li>Read access to: Locked</li> </ul>
Object Settings for Time Rule Set Assignment	<p>Tab Settings:</p> <ul style="list-style-type: none"> <li>Visible</li> </ul> <p>Object permissions:</p> <ul style="list-style-type: none"> <li>Read, Create, Edit, Delete, View All, Modify All</li> </ul> <p>Field Permissions:</p> <ul style="list-style-type: none"> <li>Edit access to:           <ul style="list-style-type: none"> <li>End Date</li> <li>Start Date</li> <li>Time Group</li> <li>Time Group Service Territory</li> <li>Time Rule Set</li> </ul> </li> </ul>



Object Settings for Service Resource Time Group Member	<p><b>Tab Settings:</b></p> <ul style="list-style-type: none"> <li>• Visible</li> </ul> <p><b>Object permissions:</b></p> <ul style="list-style-type: none"> <li>• Read, Create, Edit, Delete, View All, Modify All</li> </ul> <p><b>Field Permissions:</b></p> <ul style="list-style-type: none"> <li>• Edit access to: <ul style="list-style-type: none"> <li>○ End Date</li> <li>○ Service Resource</li> <li>○ Start Date</li> <li>○ Time Group</li> </ul> </li> </ul>
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### Create Permission Set for Access to Custom Fields

To support time categorization, your organization must manually create custom time type fields. This step should have been completed. Refer to [Create Custom Time Type Fields](#)

These fields are not included in the managed package and require a separate permission set to control user access. This permission set must be created and assigned to all Service Resources who log time that will be processed by Time Rules.

Technicians must have Read and Edit access to the applicable fields on either the Salesforce Time Sheet Entry object or the SFS-X Timesheet Entry object, depending on your implementation.

1. From Setup, enter Permission Sets in the Quick Find box and select **Permission Sets**.
2. Click **New**.
3. In the Label field, enter a name for the custom permission set, e.g. **Time Rules - Access to Custom Time Type Fields**, then click **Save**.
4. In the new Permission Set, click **Object Settings**.
5. Select **Time Sheet Entries** (Salesforce) or **Timesheet Entries** (SFS-X), then click **Edit**.
6. Under **Field Permissions**, enable **Edit Access** for the custom time type fields you created e.g.:
  - a. Regular
  - b. Overtime
  - c. Doubletime



Refer to: [Create Custom Time Type Fields](#)

7. Click **Save**.
8. Within **Object Settings**, select the Time Sheet or Timesheet object (parent object), then click **Edit**.
9. Under **Field Permissions**, enable Read Access for the roll-up summary fields created previously, e.g.:
  - a. Regular Total
  - b. Overtime Total
  - c. Doubletime Total
10. Click Save.
11. Click **Manage Assignments**, then **Add Assignments**, and select technician users who will log time that should be processed by the Time Rules Engine.

NOTE: Ensure the field-level permissions align with the object model your organization uses:

- Use Time Sheet Entry and Time Sheet objects for Salesforce standard timesheets
- Use Timesheet Entry and Timesheet objects for SFS-X custom timesheets

## Activate Flows

The Time Rules Engine includes several flows designed to automate time categorization, enforce data integrity, and support backend processing. All flows are deployed in an inactive state by default and must be activated as part of post-installation configuration.

### IMPORTANT

- 6 flows must be activated regardless of the time tracking model used (Salesforce or SFS-X).
- 4 additional flows must be activated based on your organization's object model used for time tracking:
  - Salesforce Standard Time Sheet, or
  - SFS-X Timesheet

Do not activate both sets of model-specific flows.

Test all flows in a sandbox environment before activating in production. Only activate these flows once your organization is ready to implement the Time Rules Engine, after completing user training and finalizing your rollout plan.



*Flows to Activate for All Configurations (Required)*

Flow Name	Purpose
Time Rules: Clone Time Rule Set	Enables duplication of rule sets (screen flow).
Time Rules: Lock Time Rule Set When Assigned to Time Group – Record Triggered	Locks rule set when assignment becomes active.
Time Rules: Lock Time Rule Set When Assigned to Time Group – Schedule Triggered	Locks rule sets daily for future-dated assignments.
Time Rules: Prevent Deletion of Time Type Records	Prevents users from deleting Time Types.
Time Rules: Prevent Deletion of Time Rule Records When Locked	Protects locked Time Rules.
Time Rules: Prevent Deletion of Time Rule Set Assignment Records When Active or Expired	Prevents deletion of active or expired assignments.

*Flows to Activate Based on Time Tracking Object Model (Select One Set – 4 Flows)*

**Set 1: SFS-X Timesheet Entry**

Flow Name	Purpose
Time Rules: Subflow SFS-X Split Time Sheet Entries by Time Type	Executes SFS-X-specific core logic for splitting time.
Time Rules: Trigger SFS-X Split on Create	Splits new SFS-X timesheet entries and recalculates for the day.
Time Rules: Trigger SFS-X Split on Update	Recalculates time splits after changes.
Time Rules: Trigger SFS-X Split on Delete	Adjusts splits when an entry is deleted.



## **Set 2: Salesforce Standard Time Sheet Entry**

Flow Name	Purpose
Time Rules: Subflow Split Time Sheet Entries by Time Type	Executes core logic for splitting time.
Time Rules: Trigger Split on Create	Splits new time sheet entries and recalculates for the day.
Time Rules: Trigger Split on Update	Recalculates time splits after changes.
Time Rules: Trigger Split on Delete	Adjusts splits when an entry is deleted.

To activate flows:

1. From Setup, enter Flows in the Quick Find box and select **Flows**.
2. Locate the relevant flows for your time tracking model (see tables below).
3. Click the down arrow beside each flow name and select **View Details and Versions**.
4. Under **Flow Versions**, click **Activate**.
5. Repeat for all flows required for your setup.