



Salesforce Field Service Extensions

User Guide

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Table of Contents

Introduction to SFS-X	4
Feature: Working Alone Timer and Alert System	5
Key Features	5
How It Works	5
Workflow	6
Technician Starts Working Alone Timer from Mobile App	6
Dispatcher Receives and Accepts Alert	8
Dispatcher Receives Reminder Notifications as Timer is Close to Expiring	10
Technician Extends Working Alone Timer	11
Technician Completes Working Alone Timer	12
Working Alone Timer Expires / Technician Does Not Complete Timer	12
Dispatcher Completes Alert	13
Feature: Panic Alert	15
Key Features	15
How it Works	15
Workflow	16
Technician Sends Panic Alert	16
Dispatcher Receives and Actions Panic Alert	18
Feature: Mobile Layout	21
Key Features	21
How It Works	21
Workflow	22
Feature: Dynamic Status Transitions	25
Key Features	25
How It Works	25
Workflow	26
Feature: Mass Recurring Non-Availabilities	29
Key Features	29
Workflow	29
Create Recurring Non-Availabilities for Multiple Service Resources	29
View Recurring Resource Absence Records	35
Delete Resource Absence Records	36

Delete Resource Absences from Recurring Resource Absence Record	38
Modify Resource Absence Records	39
Feature: Timesheets Management App	40
Key Features	40
How it Works	40
Workflow	41
Access the Timesheet Management App.....	41
Create a Manual Timesheet Entry.....	43
Edit a Timesheet Entry	43
Submit a Timesheet for Approval	43
Automated Entry Creation for Service Appointments	44
Automated Entry Creation from Resource Absence	45
Review Timesheets Submitted for Approval (Timesheet Reviewer / Supervisor)	46
Feature: Time Rules Engine	47
Key Features	47
How it Works	48
Getting Started with the Time Rules Engine	48
Create Time Groups	49
Add Service Resource to Time Groups.....	50
Create Time Rule Sets	52
Create Time Rules	52
Assign Time Rule Set to Time Group	56
Cloning a Time Rule Set	57
Reviewing Time Rules: Time Entry and Categorization	59
Logging and Categorizing Time	59
How It Works	60
Troubleshooting Common Issues	61
Best Practices	61
Configuration & Setup	61
Time Group & Assignment Management	62
Holiday Rules.....	62
Validation & Troubleshooting	62



Introduction to SFS-X

SFS-X (Salesforce Field Service Extensions) is a packaged solution designed to enhance core Salesforce Field Service functionality. It delivers targeted features that improve technician safety, streamline mobile workflows, automate time tracking, and reduce administrative overhead for dispatch and operations teams.

The current release includes the following features:

- **Working Alone Timer and Alert System** – Monitor and respond to technicians working alone.
- **Panic Alert** – Enable real-time emergency notifications to dispatchers
- **Mobile Layout** – Provide a structured, technician-optimized view of Service Appointment or Work Order data.
- **Dynamic Status Transitions** – Guide technicians through valid Service Appointment status changes.
- **Mass Recurring Non-Availabilities** – Schedule repeat absences for Service Resources at scale.
- **Timesheets Management** – Provide mobile technicians with a streamlined and intuitive way to log daily work time, view totals, and submit for approval, all from within the Salesforce Field Service mobile app
- **Time Rules Engine** – Automate time entry categorization using configurable business logic.

SFS-X is designed to be configurable, and scalable, extending Salesforce Field Service with practical, high-impact enhancements.

Feature: Working Alone Timer and Alert System

The **Working Alone Timer and Alert System** is designed to improve technician safety for organizations with field staff operating independently in high-risk environments. This feature allows technicians to start a timer from the Field Service mobile app when they begin working alone. It triggers real-time alerts to dispatchers, enabling timely monitoring and support.

The system provides visibility into active working alone scenarios and helps reduce the risks associated with remote or hazardous field work.

Key Features

- **Working Alone Timer Action**
The quick action is accessed from a Service Appointment record in the Field Service mobile app. Technicians set the timer duration and can enter context for dispatchers. The Working Alone Timer quick action must be configured for mobile technicians to access.
- **Alerts Utility Panel**
Displays active alerts to dispatchers in real time. Alerts can be expanded to view additional technician and appointment details. Displayed fields can be customized.
- **Dispatcher Notifications**
Real-time pop-up notifications appear in the Field Service console when a technician in the dispatcher's Service Territory starts a timer. These remain visible until acknowledged.
- **Alert records**
A custom object stores the history of each working alone event, including start and end times, technician, location, and related Service Appointment information.

How It Works

Mobile technicians use a quick action to launch a Working Alone Timer, specifying a duration and optional comments. Once started, a real-time alert is sent to dispatchers via a utility panel in the Field Service console, where it remains active until resolved.

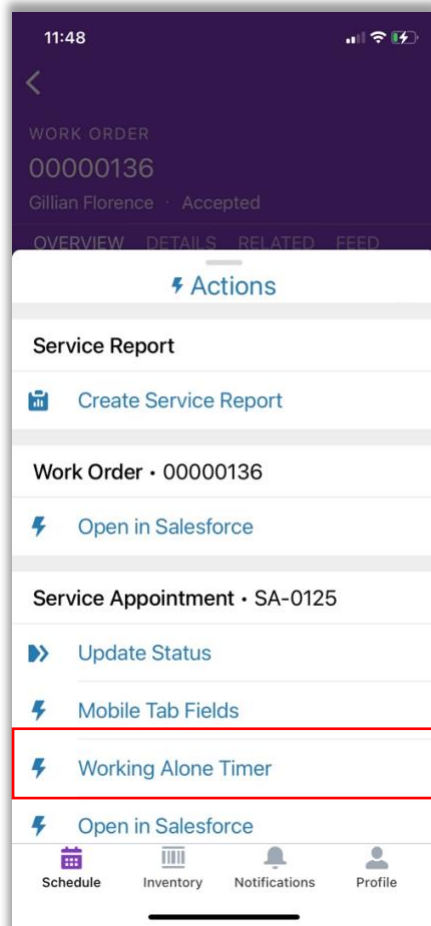
Alert details—including technician name, location, time remaining, and associated Service Appointment—are recorded in a custom object for visibility and historical tracking.

Workflow

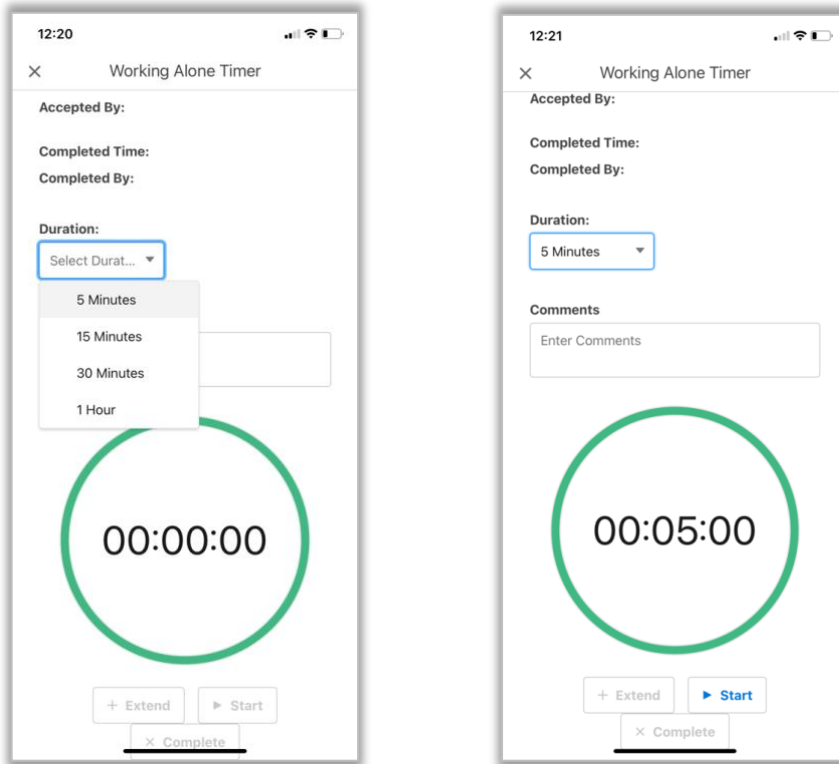
Technician Starts Working Alone Timer from Mobile App

With the Working Alone Timer action configured on the page layout assigned to technicians, they can access the action from any service appointment within the Field Service mobile app.

1. In the Field Service mobile app, from a service appointment, access Actions and tap Working Alone Timer.



2. Select a Duration from the drop-down list for the expected time that the high-risk activity will be performed.



3. Enter Comments (optional).
When the timer starts, any comments entered by the technician will display in the alert notification (if an administrator has configured the field in the Field Set) for the dispatcher to see messages from the technician. The comments will also be available in the Alert record.

NOTE: Comments may not be configured to display.

4. Tap the **Start** button to begin the timer countdown.
As soon as the timer begins, an alert notification is sent to dispatchers in the Field Service app. The notification remains until the dispatcher clicks Accept.

Once a timer has started, an Alert record is created with the following details:

Status = New

Start Time: Date/Time the timer started.

Initial Duration: Duration selected by the technician.

Total Duration: Initial Duration plus any extended time added by the technician.

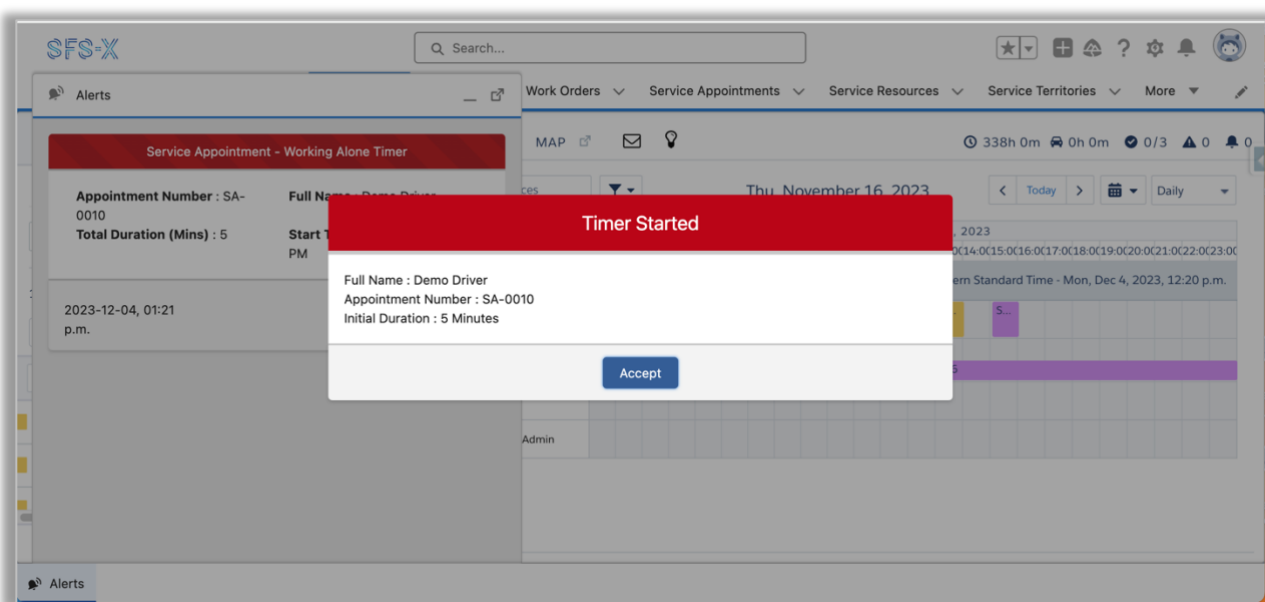
Service Appointment: Service Appointment record number from which the Working Alone Timer was initiated.

Resource: Name of the technician that started the timer.

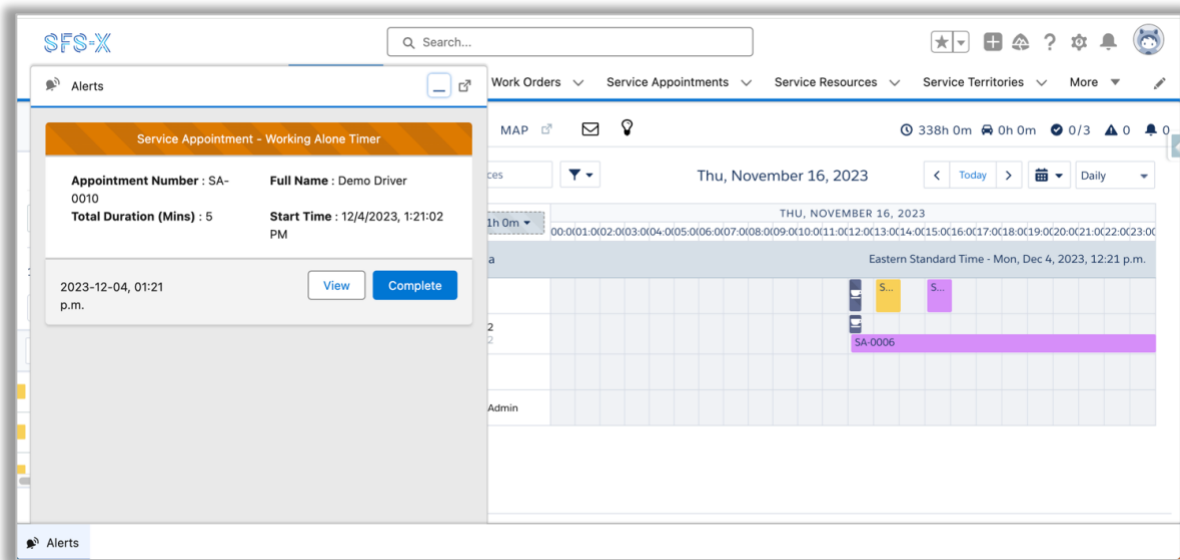
Dispatcher Receives and Accepts Alert

1. While working in the SFS-X app, or other Field Service lightning app configured with the Alerts utility panel, as soon as the technician starts a Working Alone Timer their dispatcher(s) receive an alert notification that a Working Alone Timer has started.
2. The alert displays details about the technician, service appointment, and timer information. An alert also displays in the utility panel. The fields and details that display in the alert notification can be customized by an administrator using the provided Alert field set.

NOTE: Dispatchers only receive alerts from technicians who are members of their Service Territory.



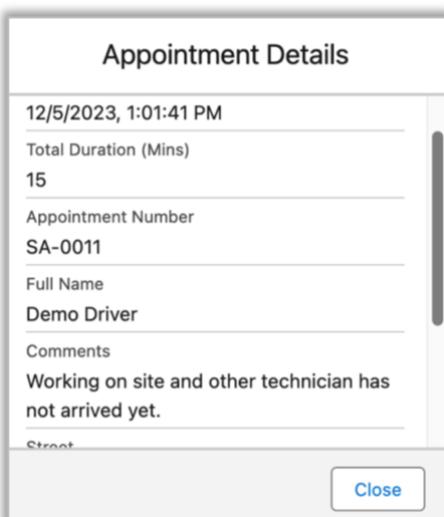
3. As the dispatcher, click **Accept** in the Timer Started notification. Once the dispatcher clicks Accept, the notification disappears, and the following occurs:
 - Alert remains in the Alerts utility panel as orange, indicating an active alert. The View and Complete buttons are available.
 - Alert record fields are updated:
 - Status: Accepted
 - Accepted By: dispatcher user who accepted the alert.
 - Accepted Time: timestamp of when the alert was accepted.



- Click **View** for more details about the alert and service appointment.

The fields that display can be customized by an administrator, such as:

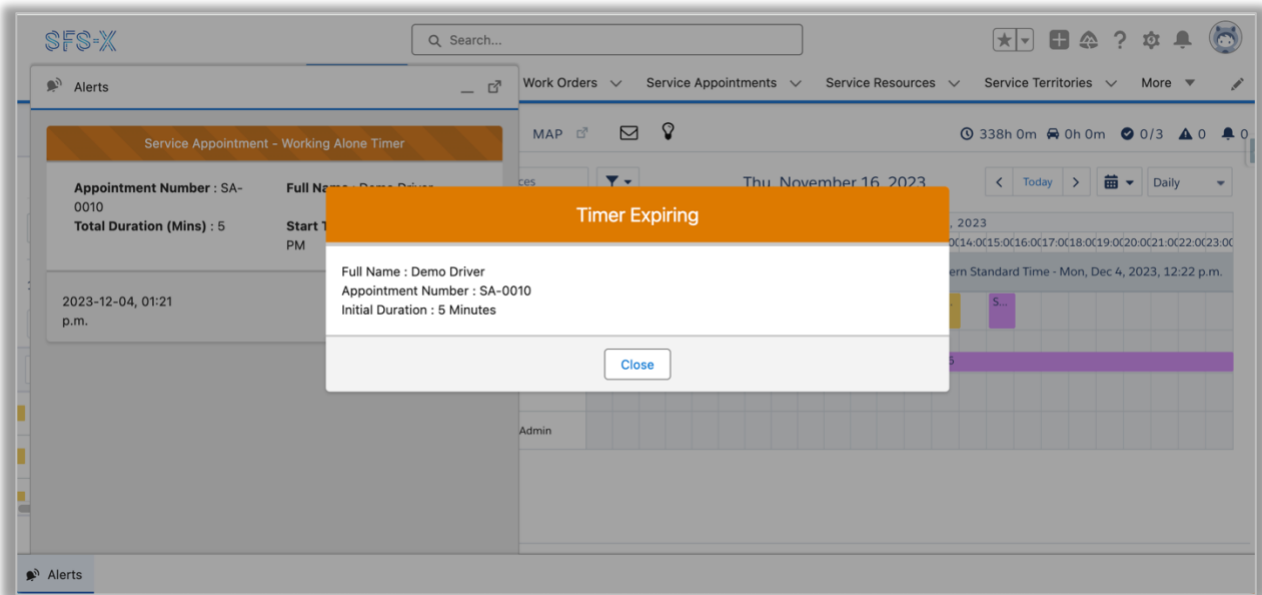
- Service Appointment Number
- Comments
- Total Duration
- Initial Duration
- Start Time
- Address
- Service Resource
- Alert Location



Dispatcher Receives Reminder Notifications as Timer is Close to Expiring

Based on countdown frequencies set by your administrator, for each duration option, dispatchers receive notifications throughout the timer countdown to remind them that a Working Alone Timer is still active.

The default settings send these reminder notifications frequently, but these can be modified.



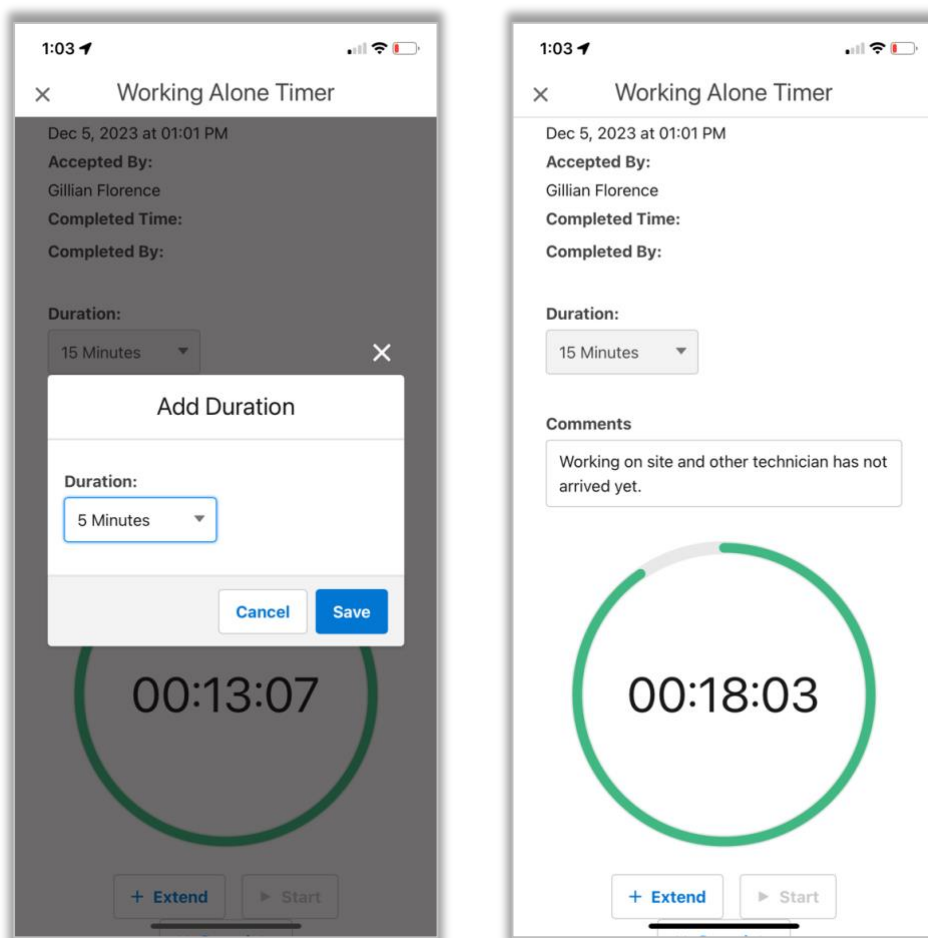
Technician Extends Working Alone Timer

At any point while a Working Alone Timer is active, if a technician anticipates they will be working alone beyond the timer's initial duration, they can add more time without interrupting the timer countdown.

1. From the Working Alone Timer interface, tap **Extend+**.
2. From the **Add Duration** modal, select the desired time to add to the timer from the Duration drop down and tap **Save**.

The duration is added to the timer UI and the timer continues to countdown.

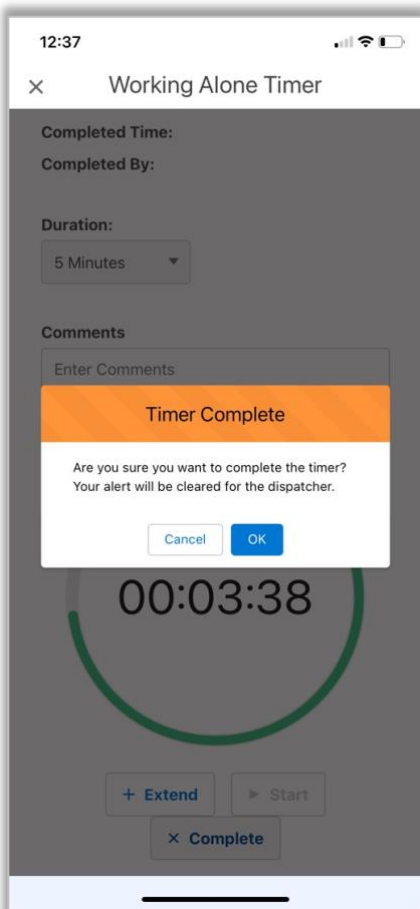
When a timer is extended by a technician, the alert record is updated with the new "Total



Duration (Mins)" value and if the "Total Duration (Mins)" field is configured to display in the alerts, the value is updated to reflect the new duration. This detail keeps the dispatcher informed on the status of an active timer.

Technician Completes Working Alone Timer

Once a technician has completed their high-risk task and is no longer in an alone worker scenario, they can tap the **Complete** button to stop the timer. A confirmation message displays to confirm their intentions before the timer stops.



This action clears their alert from the Alerts utility panel, and their dispatcher will no longer see the alert, informing dispatchers that their technician is safe and done working alone.

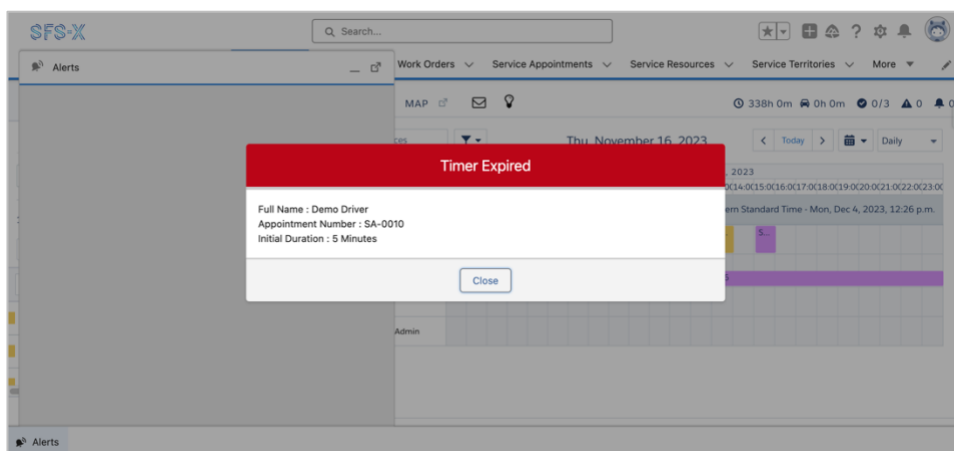
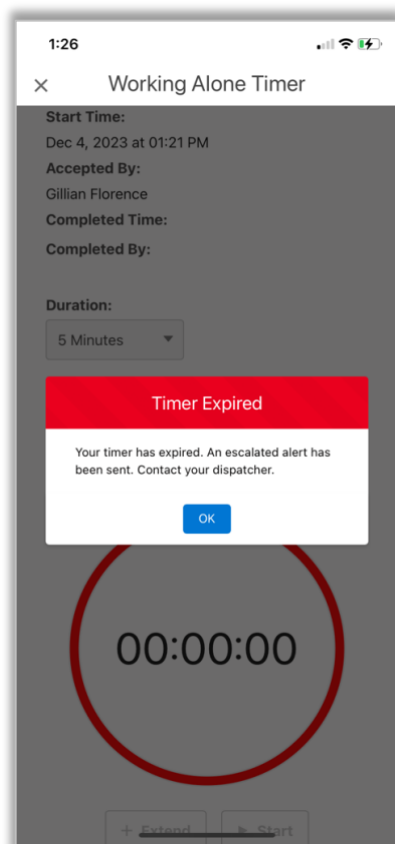
Once the technician confirms and the timer stops, the Alert record is updated with the following details:

- Status = Completed
- Completed Time
- Completed By

Working Alone Timer Expires / Technician Does Not Complete Timer

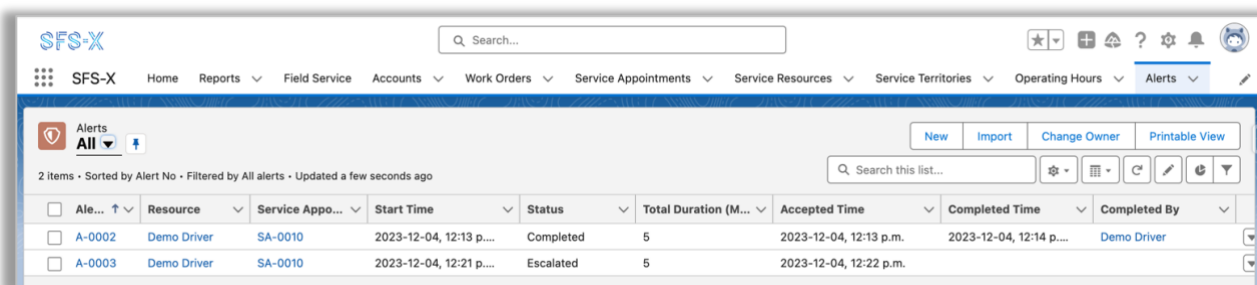
Once the Working Alone Timer has expired, their dispatcher is immediately notified to let them know that the technician hasn't acted on their timer.

With this information, the dispatcher can take the necessary steps to contact the technician or get others involved.



When a timer expires the alert is removed from the utility panel and the Alert record is updated with Status = Escalated.

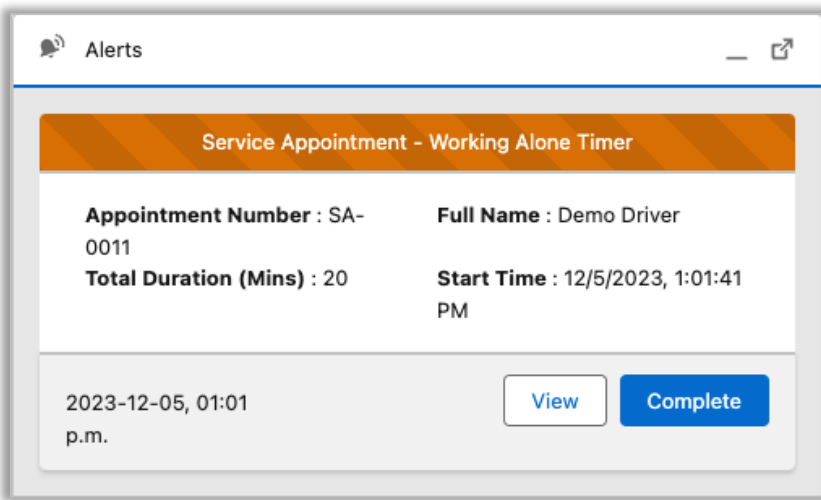
To review all alerts, the dispatcher can navigate to the Alerts tab. Here they can sort and filter by any field such as Status (e.g. Escalated), Service Appointment, or Resource.



Dispatcher Completes Alert

For cases when a technician cannot complete the timer on their Field Service mobile app during a service appointment, their dispatcher can complete the timer on their behalf from the Alerts

utility panel. When the dispatcher clicks Complete, the alert is cleared from the utility panel, and the alert record is updated.



The screenshot shows a mobile application interface for alerts. At the top, there's a header bar with a bell icon and the word "Alerts". Below this is a card titled "Service Appointment - Working Alone Timer". The card contains the following information:

Appointment Number : SA-0011	Full Name : Demo Driver
Total Duration (Mins) : 20	Start Time : 12/5/2023, 1:01:41 PM

At the bottom of the card, there's a timestamp "2023-12-05, 01:01 p.m." and two buttons: "View" and "Complete".

- Status = Completed
- Completed By – auto populates with dispatcher user.
- Completed Time – auto populates with date/time that the alert was completed.

The Working Alone Timer automatically resets on the Field Service mobile app for the technician and is updated with “Completed By” and “Completed Time” details. This informs the technician that the alert has been completed by their dispatcher.

NOTE: If the Technician does not have a network connection, the timer continues.

Feature: Panic Alert

The **Panic Alert** feature provides mobile technicians with an emergency quick-action tool designed to notify dispatchers immediately when urgent assistance is needed in the field. Unlike the Working Alone Timer, Panic Alert requires no countdown, it is meant for immediate, unforeseen risk situations.

This feature helps ensure technician safety by enabling rapid awareness and response from dispatchers through real-time alerts in the Field Service console.

Key Features

1. **Immediate Emergency Activation**

Technicians can trigger the Panic Alert with a single tap from the Field Service mobile app. Designed for urgent, unforeseen situations in the field.

2. **Real-Time Dispatcher Notification**

As soon as a Panic Alert is sent, dispatchers receive an immediate pop-up alert in the Field Service console. The alert remains active until acknowledged and completed by the dispatcher.

3. **Alert Utility Panel**

Panic Alerts are displayed in the Alerts utility panel accessed by dispatchers, along with Working Alone Timer alerts.

4. **Alert Record**

Each Panic Alert automatically generates a timestamped Alert record containing:

5. Service Resource name
6. Location data: GPS coordinates (Lat/Long)
7. Alert type and status

How it Works

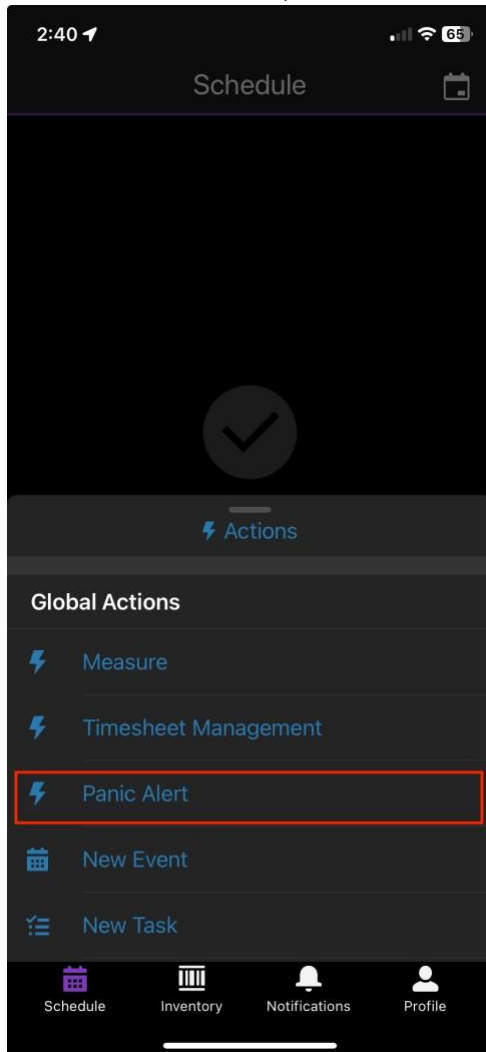
Technicians can launch a **Panic Alert** at any time from the Field Service mobile app using a quick action. This sends an immediate emergency notification to dispatchers, with no countdown or delay. The alert appears in real time within the **Alerts utility panel** in the Field Service console and remains active until completed by a dispatcher.

A corresponding **Alert record** is automatically created, capturing timestamp, location (GPS), technician name, and associated metadata. These records support follow-up, auditing, and incident tracking.

Workflow

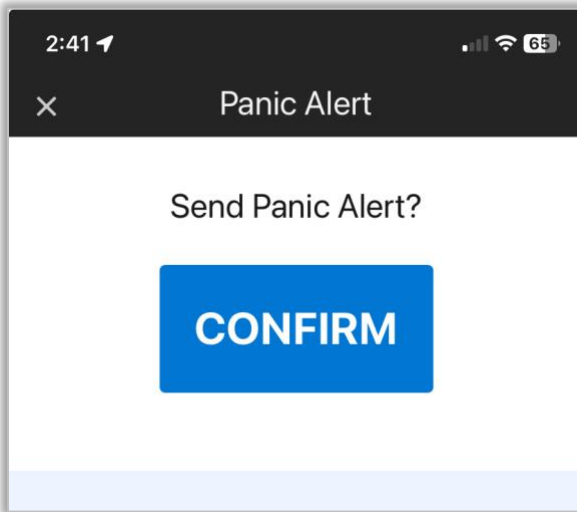
Technician Sends Panic Alert

1. In the Field Service mobile app, tap **Actions**.
2. Under Global Actions, select **Panic Alert**.

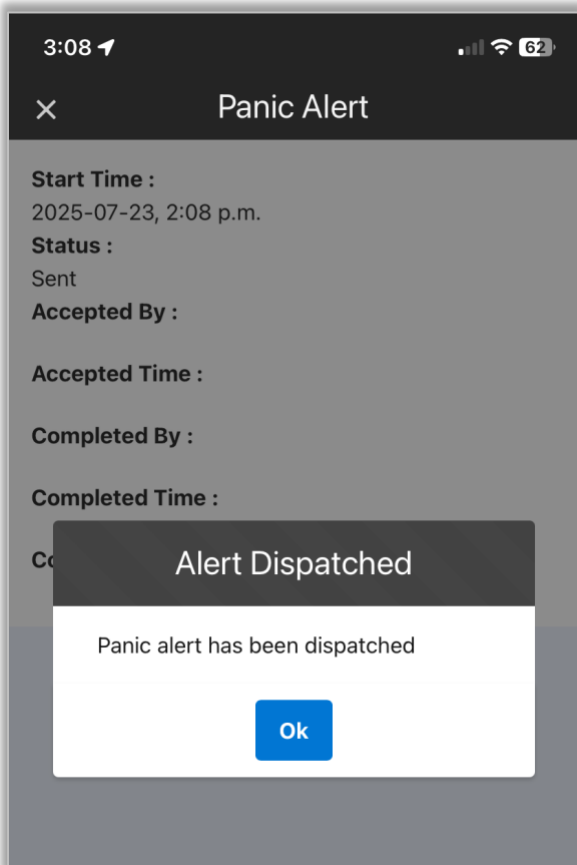


If a confirmation message is configured, it will appear before the alert is sent.

3. Tap **Confirm** to trigger the Panic Alert notification.



4. Tap **OK** to close the confirmation message that indicates the Panic Alert has been sent.



Once sent:

- A real-time alert is sent to the technicians' dispatchers.
- An Alert record is created with technician, location, and timestamp details.

- The technician cannot cancel the alert after it is sent.

Dispatcher Receives and Actions Panic Alert

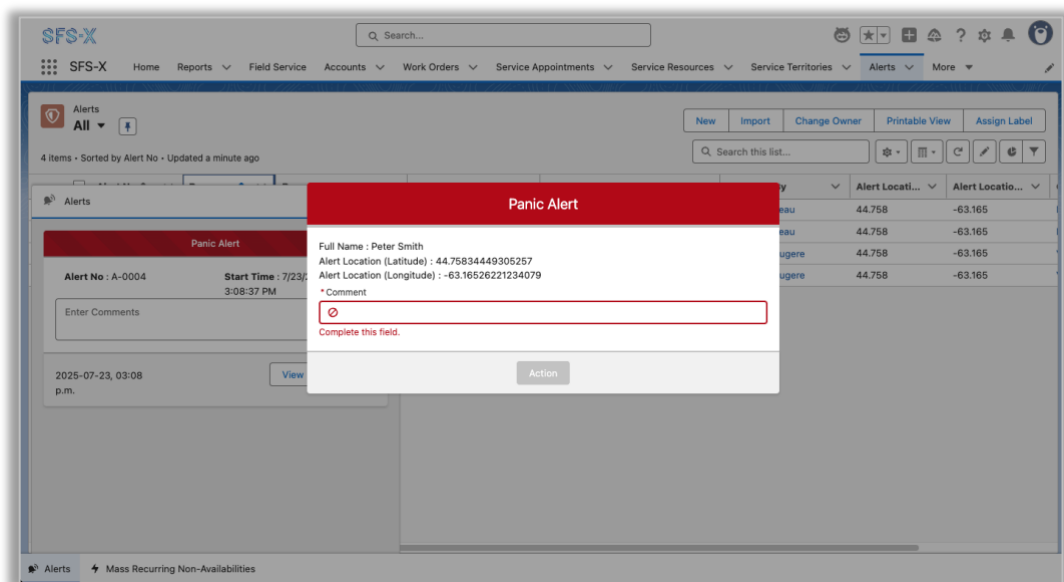
When a Panic Alert is triggered by a technician:

- A **real-time pop-up notification** appears in the Field Service console for dispatchers assigned to the technician's Service Territory.
- The alert contains technician details, timestamp, and location.
- A corresponding **Alert record** is automatically created, capturing:
 - **Resource Name**
 - **Status**
 - **Start Time**
 - **Accepted By**
 - **Accepted Time**
 - **Alert Location (Latitude / Longitude)**
 - **Completed By**
 - **Completed Time**

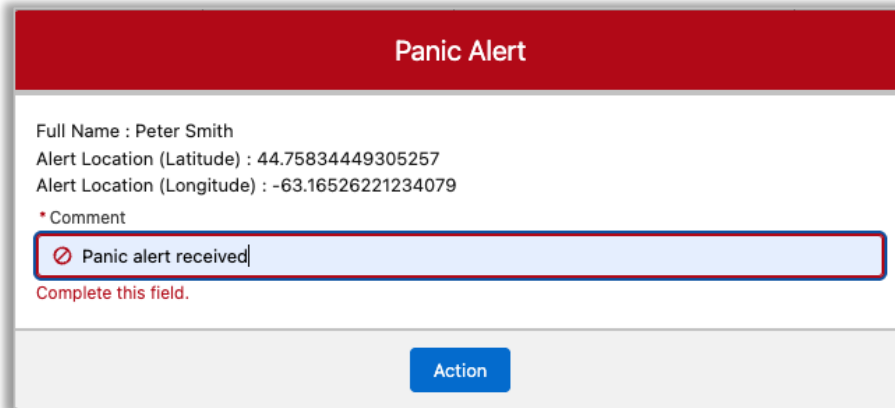
To acknowledge and manage the alert:

1. In the Panic Alert pop-up notification, enter **Comments** (required).

The Action button will not become active until comments are entered. These comments are visible to the technician in the mobile app and help provide immediate reassurance and direction.



2. Click **Action** to acknowledge the alert.



Panic Alert

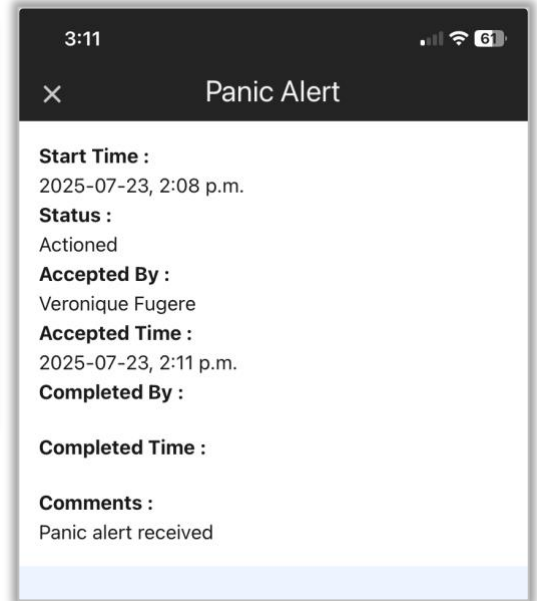
Full Name : Peter Smith
 Alert Location (Latitude) : 44.75834449305257
 Alert Location (Longitude) : -63.16526221234079

* Comment

⊘ Panic alert received

Complete this field.

Action



3:11

×

Panic Alert

Start Time :
2025-07-23, 2:08 p.m.

Status :
Actioned

Accepted By :
Veronique Fugere

Accepted Time :
2025-07-23, 2:11 p.m.

Completed By :

Completed Time :

Comments :
Panic alert received

- The alert remains active and is displayed in the Alerts utility panel, indicating that the situation is being monitored.
 - The Alert record is updated with the following action details:
 - Status = Accepted
 - Accepted By = Dispatcher user
 - Accepted Time = Timestamp
 - Dispatcher Comments = Saved in the record and visible in the technician's mobile interface
 - The technician's Panic Alert component is also updated in real time to reflect:
 - The alert has been acknowledged
 - Who acknowledged it
 - What comments were provided
3. The dispatcher follows emergency protocols based on organizational safety procedures to address the situation.
4. Once the emergency has been resolved, the dispatcher clicks Complete from the active alert in the Alerts utility panel.
- The alert is removed from the dispatcher's active view.
 - The Alert record is updated with:
 - **Status** = Completed
 - **Completed By** = Dispatcher user
 - **Completed Time** = Timestamp
 - The technician's mobile interface is updated to reflect that the Panic Alert has been completed, along with the name of the dispatcher who completed it.
5. Alert records remain accessible for follow-up and review.

SFS-X Home Reports Field Service Accounts Work Orders Service Appointments Service Resources Service Territories Operating Hours **Alerts** More

Search...

Alerts **All** 1

New Import Change Owner Printable View Assign Label

6 items - Sorted by Alert No - Updated a few seconds ago

Search this list...

☐	Alert No	Resource	Record Type	Status	Start Time	Accepted By	Alert Locati...	Alert Loc...	Completed By
1	☐ A-0000	Peter Smith	Panic Alert	Completed	2025-07-10, 3:26 p.m.	Melissa Juneau	44.758	-63.165	Melissa Juneau
2	☐ A-0001	Peter Smith	Panic Alert	Completed	2025-07-10, 3:27 p.m.	Melissa Juneau	44.758	-63.165	Melissa Juneau
3	☐ A-0002	Peter Smith	Panic Alert	Completed	2025-07-16, 12:03 p.m.	Veronique Fugere	44.758	-63.165	Veronique Fugere
4	☐ A-0003	Peter Smith	Panic Alert	Completed	2025-07-16, 12:07 p.m.	Veronique Fugere	44.758	-63.165	Veronique Fugere
5	☐ A-0004	Peter Smith	Panic Alert	Completed	2025-07-23, 2:08 p.m.	Veronique Fugere	44.758	-63.165	Veronique Fugere
6	☐ A-0005	Peter Smith	Panic Alert	Completed	2025-07-23, 2:13 p.m.	Veronique Fugere	44.758	-63.165	Veronique Fugere

Feature: Mobile Layout

The Mobile Layout feature enhances the Field Service mobile experience by providing a structured, tab-based interface tailored specifically for technicians. Built using standard Salesforce page layout configuration, it enables administrators to define how key service appointment information is presented, without requiring custom development or additional setup.

Key Features

- **Configurable Interface for Mobile:** Use standard Salesforce page layouts to define tabs, field visibility, and layout structure, optimized for mobile.
- **Intuitive, Tab-Based Navigation:** Technicians can quickly access relevant information through a clean, organized layout, minimizing scrolling and improving on-site efficiency.
- **Real-Time Updates:** Field changes made in the mobile layout are immediately synced with Salesforce, supporting accurate, up-to-date service records.
- **Simple Administration:** Any updates to the assigned page layout, such as new fields, reordered sections, or updated field properties, are instantly reflected in the mobile interface.

How It Works

Mobile Layout uses the assigned Service Appointment page layout to determine which sections and fields are displayed in the mobile app. Each layout section becomes a tab, and the fields within each section are shown in sequence, matching the order and properties defined in the layout.

The interface automatically respects:

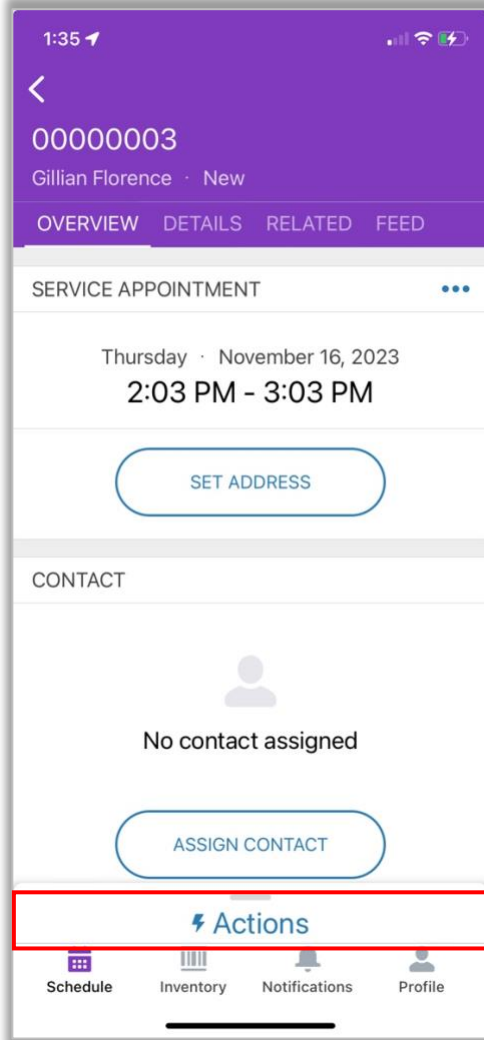
- Field-level visibility
- Read-only and required properties
- Section groupings and order

No additional configuration is required beyond the standard page layout setup.

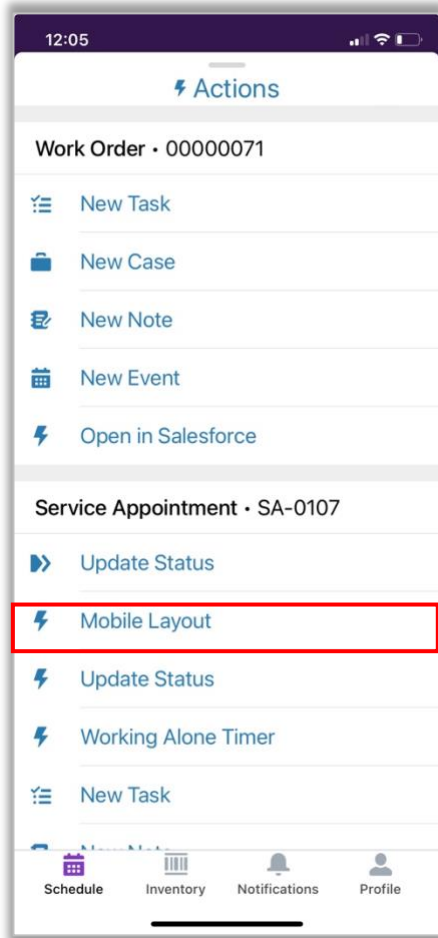
Workflow

Once configured, the Mobile Layout action is available from all Service Appointments or Work Orders in the Field Service mobile app through the Actions menu.

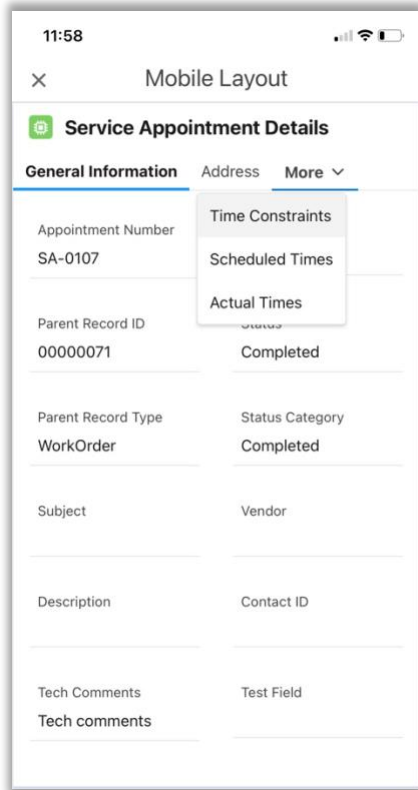
1. Within the Field Service mobile app, navigate to a Service Appointment and tap **Actions**.



2. From the Actions menu, tap **Mobile Layout**.



3. Navigate within the customized tabs and field layout to view or update data.



11:58

× Mobile Layout

 **Service Appointment Details**

General Information Address More ▾

Appointment Number
SA-0107

Parent Record ID
00000071

Parent Record Type
WorkOrder

Subject

Description

Tech Comments
Tech comments

Time Constraints

Scheduled Times

Actual Times

Completed

Status Category
Completed

Vendor

Contact ID

Test Field

NOTE: Any Lookup field that is configured on the Mobile Layout is read-only due to current known limitations with lightning web components in the Field Service mobile app. Address fields and Geolocation fields are also read-only.

Feature: Dynamic Status Transitions

Dynamic Status Transitions simplifies the way technicians update the status of Service Appointments by guiding them through only the valid next steps in the appointment lifecycle. Instead of presenting the full list of status values, the interface displays only the next allowed status options, based on your organization's configured transition paths.

This helps ensure accuracy, reduce user error, and streamline the update process, without requiring admin-maintained flows.

Key Features

Guided Status Updates

Technicians see only the allowed next status values, ensuring consistency with your organization's defined service workflows and reducing mistakes.

Automatic Updates

Dynamic Status Transitions automatically adapts to changes made to:

- Service Appointment Status field picklist values
- Status Transition settings in Field Service Admin

When a status is added or removed from the Service Appointment object or its transitions, the update is reflected immediately in the technician's interface—ensuring the options shown are always valid and up to date.

This removes the need for administrators to build or maintain custom flows or decision logic.

How It Works

When a technician launches the **Update Status** action from the Field Service mobile app, they are presented with only the valid next statuses defined by your **Status Transition settings** in Field Service Admin Settings. This dynamic behavior guides the user through the appointment lifecycle step by step.

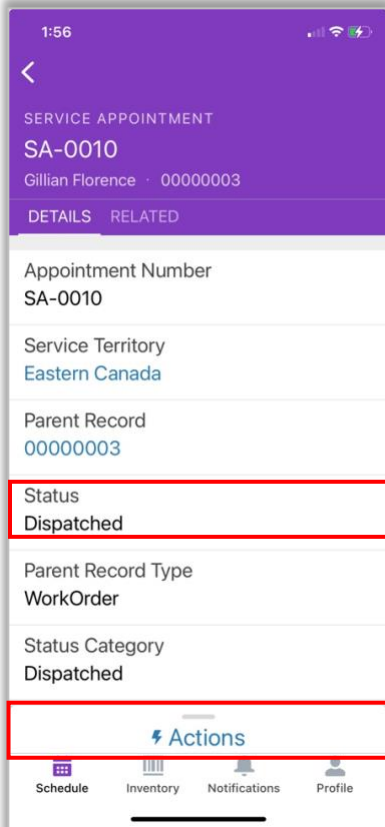
The interface automatically reflects any changes made to the status picklist values or transition rules—no additional configuration or flow logic is required.

Workflow

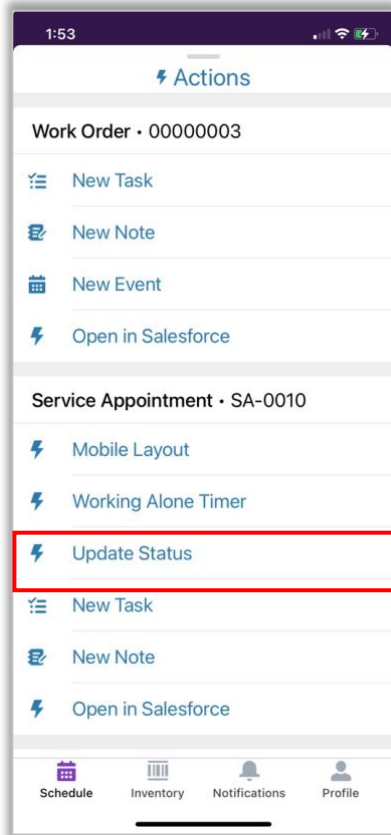
Once configured by an administrator, the **Update Status** action is available from all Service Appointments in the Field Service mobile app through the Actions menu.

Within the Field Service mobile app, navigate to a Service Appointment and tap **Actions**.

Note the current Status shown in the example below is “Dispatched”.

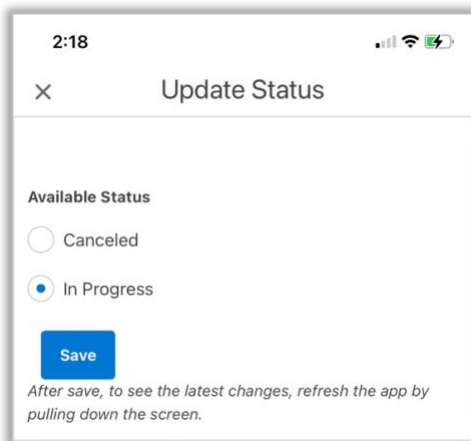


1. From the Actions menu, tap Update Status.



The Update Status user interface displays the next valid status options available for the technician. The options available depend on the current status, configured status transitions, and any restrictions for status transitions configured for the technician's profile.

From the current status of Dispatched, the next valid statuses in this example are Canceled or In Progress.



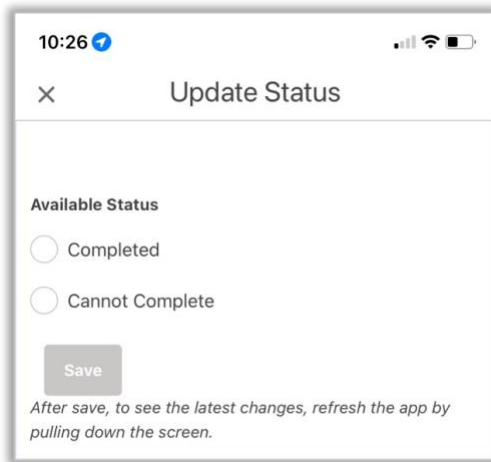
2. Select a status and tap **Save**.

IMPORTANT TO NOTE

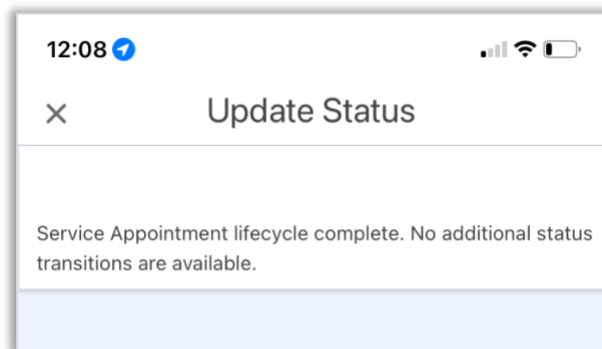
The Update Status window will close automatically once save is successful. Depending on the network connection, this may take several seconds. Wait until the window closes.

3. Refresh the app by pulling down the screen to see the latest status change in the schedule view.
4. Once the technician is ready to change their status from In Progress to Completed, tap Actions from the service appointment, and then **Update Status**.

The next valid options from In Progress status are shown.



5. Once the service appointment lifecycle is complete, no other statuses will be shown in the Update Status user interface if it is launched.



Feature: Mass Recurring Non-Availabilities

The Mass Recurring Non-Availabilities feature is designed to improve dispatcher efficiency. This solution allows dispatchers to manage service resource schedules by streamlining the creation and deletion of recurring non-availabilities for multiple service resources at once through a single, intuitive user interface.

Key Features

Mass Creation of Recurring Non-Availabilities for Multiple Service Resources

Dispatchers can create recurring non-availabilities for multiple service resources simultaneously. The feature includes options to select and filter service resources by service territory, set start and end times, specify absence type, define recurrence patterns (daily, weekly, monthly, or yearly), and set recurrence range.

Mass Deletion of Resource Absences

Dispatchers can easily delete multiple resource absences for many service resources at once, simplifying the management of resource schedules.

Using the Mass Recurring Non-Availabilities utility, dispatchers can set criteria to retrieve specific absence records based on service territory, absence types, and date ranges, allowing them to target specific resource absence records for deletion. Through the user interface, users can review the retrieved absence records and then select/deselect records for deletion, providing granular control over the deletion process.

Workflow

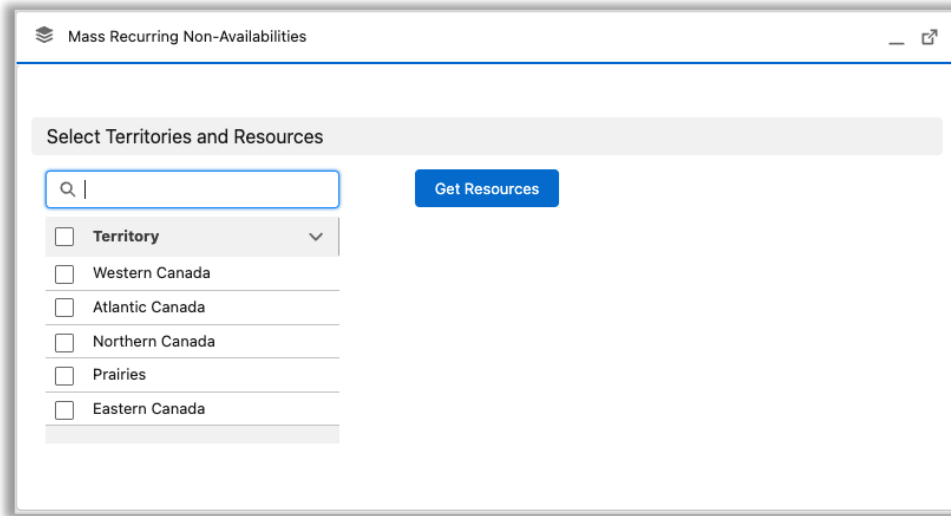
Once configured, the Mass Recurring Non-Availabilities utility is available for users within the SFS-X app or other customized Field Service lightning app.

Create Recurring Non-Availabilities for Multiple Service Resources

1. Click the Mass Recurring Non-Availabilities utility item.
2. Select one or more service territories to locate service resources by service territory.

NOTE: The service territories that are shown for selection match your Gantt filtering settings in the Field Service console. Service territories without assigned resources are

not shown in the Gantt but are shown in the selection list.



Mass Recurring Non-Avabilities

Select Territories and Resources

Q |

Get Resources

☐ Territory

☐ Western Canada

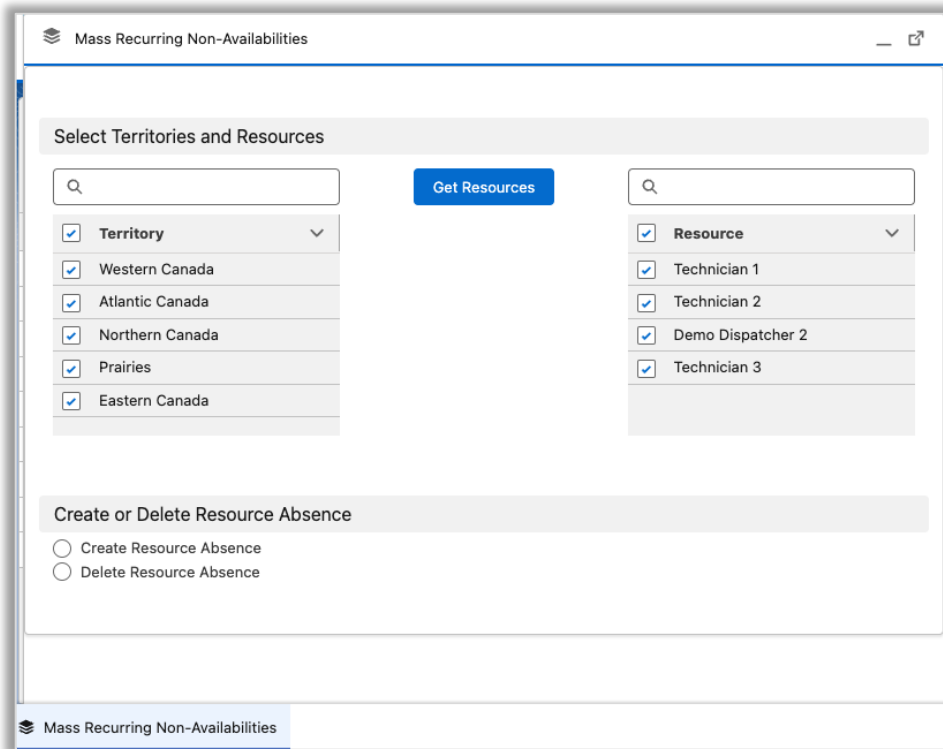
☐ Atlantic Canada

☐ Northern Canada

☐ Prairies

☐ Eastern Canada

- With service territories selected, click **Get Resources**.
The service resource list displays with the relevant resource names based on the service territories selected.
- Select service resource names from the list. Once selected, you can now choose to either create resource absences or delete resource absences.



Mass Recurring Non-Avabilities

Select Territories and Resources

Q

Get Resources

Q

☒ Territory

☒ Western Canada

☒ Atlantic Canada

☒ Northern Canada

☒ Prairies

☒ Eastern Canada

☒ Resource

☒ Technician 1

☒ Technician 2

☒ Demo Dispatcher 2

☒ Technician 3

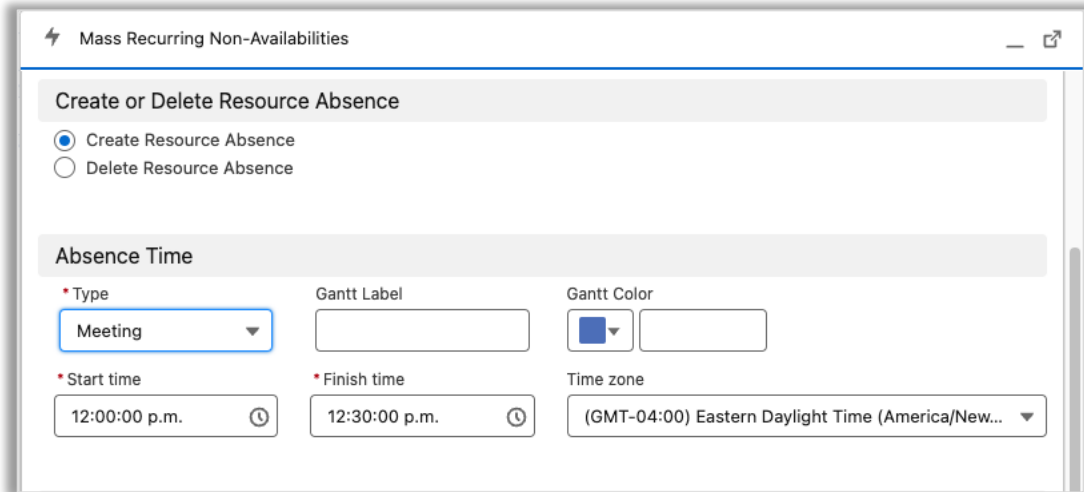
Create or Delete Resource Absence

☐ Create Resource Absence

☐ Delete Resource Absence

Mass Recurring Non-Avabilities

5. Select **Create Resource Absences**. The user interface displays sections to enter your resource absence details.
6. Enter Absence Time details.



Mass Recurring Non-Availabilities

Create or Delete Resource Absence

☒ Create Resource Absence
☐ Delete Resource Absence

Absence Time

* Type: Meeting
 Gantt Label:
 Gantt Color: Blue
 * Start time: 12:00:00 p.m.
 * Finish time: 12:30:00 p.m.
 Time zone: (GMT-04:00) Eastern Daylight Time (America/New...)

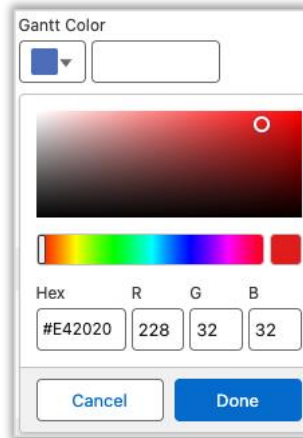
- a. Click **Absence Type** to select from the list.
The values shown are based on your organization's configuration for the Absence Type picklist field. E.g., Meeting, Vacation, Training, Medical or any custom value your organization uses.
- b. Select a **Start Time** and **Finish Time**. This will be the time for each resource absence event.
- c. Optionally, add a **Gantt label**.

The Gantt label appears on the non-availability absence in the Gantt. For example, Company Meeting or Field Training. If a label is not entered, the absence type (Meeting, Vacation, Training) displays.

NOTE: If approval confirmation is enabled, only approved absences can block a mobile worker's availability and appear on the Gantt. Unapproved absences aren't considered in scheduling or shown on the Gantt.

- d. Optionally, select a **Gantt Color**.

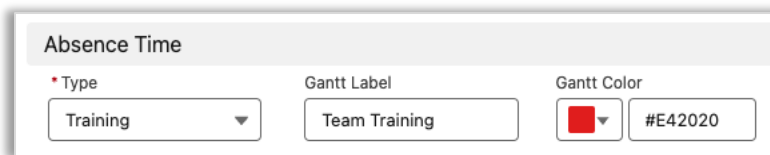
Click the color picker to select a color from the palette. The Hex value will automatically populate. The Gantt Color field for all Resource Absence records created in the series will populate with the hex value.



Gantt Color

Hex: #E42020 R: 228 G: 32 B: 32

Cancel Done



Absence Time

Type: Training Gantt Label: Team Training Gantt Color: #E42020

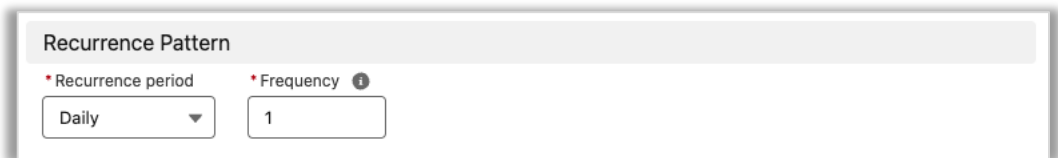
- e. If needed, change the Time Zone.

By default, the Time Zone selected is your time zone. Resource absence records will always display time adjusted to the viewing users time zone, however, in cases where you want to specify another time zone for ease of creation, you can change the time zone in the Time Zone field.

7. Set the Recurrence Pattern:

- a. Click **Recurrence Period** and select either Daily, Weekly, Monthly, or Annually from the list.

The associated recurrence options display based on your selection.

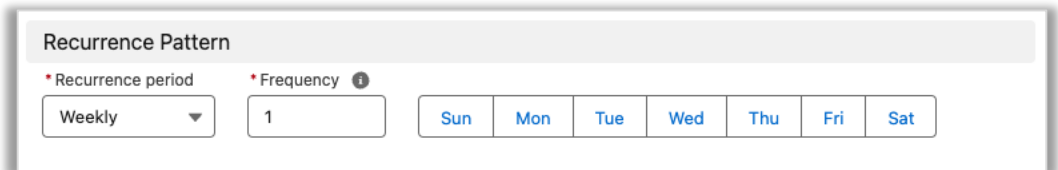


Recurrence Pattern

Recurrence period: Daily Frequency: 1

- b. Set the relevant options for the desired recurrence pattern.

When Weekly is selected, you must set the recurrence days for the absence.

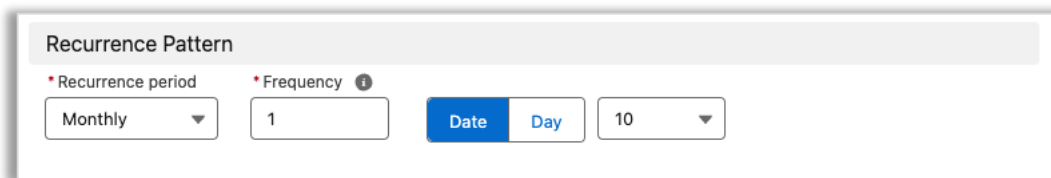


Recurrence Pattern

Recurrence period: Weekly Frequency: 1

Sun Mon Tue Wed Thu Fri Sat

When Monthly is selected, you can set the recurrence by Date or Day, e.g. repeat every *First Monday*.

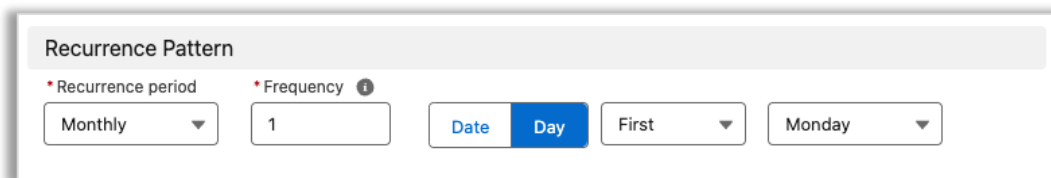


Recurrence Pattern

* Recurrence period: Monthly

* Frequency: 1

Date Day 10



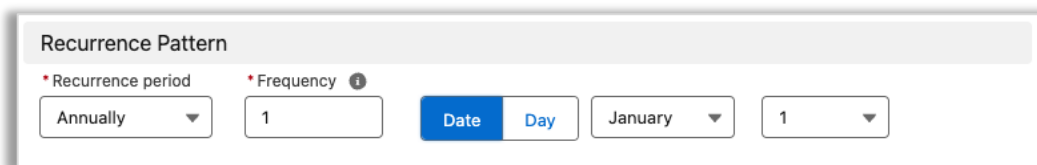
Recurrence Pattern

* Recurrence period: Monthly

* Frequency: 1

Date Day First Monday

When Annually is selected, you can set the recurrence by Date or Day, e.g. repeat every *First Wednesday of March*.

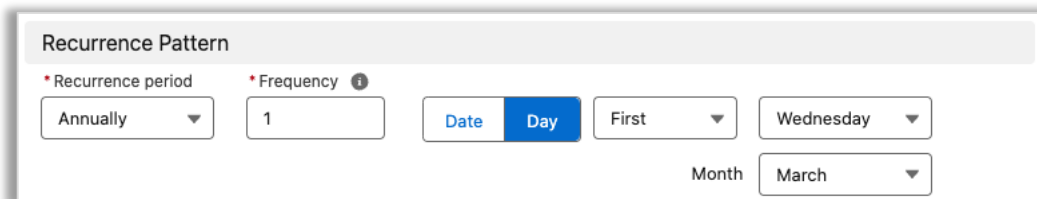


Recurrence Pattern

* Recurrence period: Annually

* Frequency: 1

Date Day January 1



Recurrence Pattern

* Recurrence period: Annually

* Frequency: 1

Date Day First Wednesday

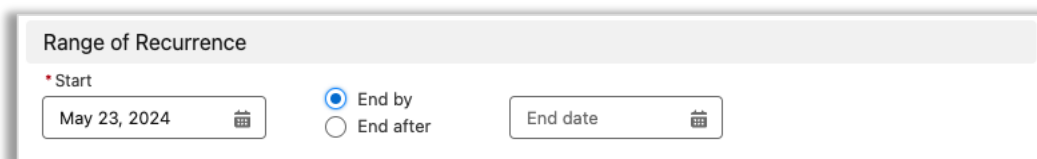
Month March

- c. Enter a **Frequency** value.

The valued entered is how frequently the resource absence occurs during the selected range of recurrence. For example, if you select “Weekly” as the recurrence period and enter a frequency of 2, the absence occurs every 2 weeks.

8. Set the Range of Recurrence:

- a. Click **Start Date** to select a date from the calendar.
- b. Select an end option, either End by and set an End date or End after and enter a value to end the recurring absences after the specified number of occurrences.



Range of Recurrence

* Start: May 23, 2024

☒ End by ☐ End after

End date

Range of Recurrence

* Start

May 23, 2024

☐ End by

☒ End after

* Occurrences

No.

9. Once all recurring resource absence options are set, click **Create** or click Cancel to reset the form.

The relevant number of individual non-availability resource absence records are created.

Mass Recurring Non-Availabilities

Absence Time

* Type

Training

Gantt Label

Team Training

Gantt Color

#E42020

* Start time

2:00:00 p.m.

* Finish time

2:30:00 p.m.

Time zone

(GMT-04:00) Eastern Daylight Time (America/New...)

Recurrence Pattern

* Recurrence period

Monthly

* Frequency

1

Date

Day

Second

Wednesday

Range of Recurrence

* Start

May 23, 2024

☒ End by

☐ End after

Dec 31, 2024

Address

Cancel

Create

1.877.341.3227

www.diabsolut.com

support-sfs-x@diabsolut.com

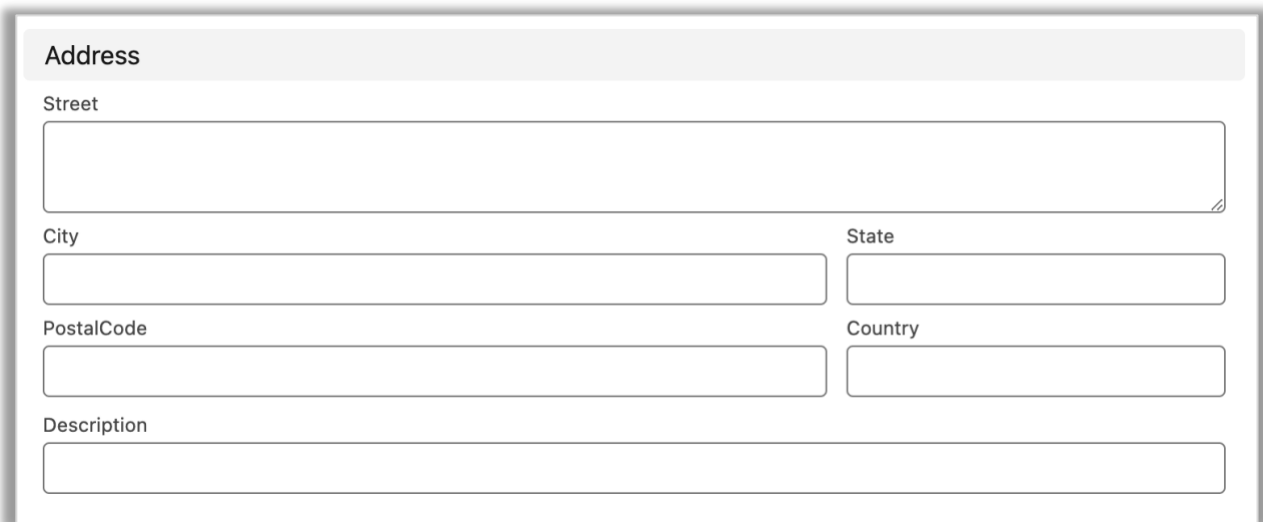
Including an Address

The Mass Recurring Non-Availabilities utility includes a section for you to optionally enter an address such as a training location. If an address is entered, this address will populate each of the resource absence records for all service resources.

For absences that don't span an entire shift—like a morning medical appointment—the absence address is used to determine travel time to and from adjacent service appointments. Appointments aren't scheduled during dedicated travel time.

If an absence doesn't have an address, optimization uses the resource's home base to calculate travel time to the next service appointment.

For a more precise travel estimate, add an address to the resource absence. With Enhanced Scheduling and Optimization, optimization and scheduling actions use the location of the last event (Service Appointment or Resource Absence) that has a location to calculate the travel time to the next event.



The screenshot shows a form titled "Address" with the following fields:

- Street**: A large text input field.
- City**: A text input field.
- State**: A text input field.
- PostalCode**: A text input field.
- Country**: A text input field.
- Description**: A text input field.

View Recurring Resource Absence Records

When resource absence records are created using the Mass Recurring Non-Availabilities feature, a Recurring Resource Absence record is automatically created. This record represents the series. Each Resource Absence record created in the series is automatically populated with the corresponding Recurring Resource Absence record. This setup allows for efficient organization and management of absence records, ensuring clarity on which series each resource absence belongs to.

You can open the Recurring Resource Absence record to view all the individual child resource absence records created in the series in the Resource Absence related list.

NOTE: The parent Recurring Resource Absence record cannot be deleted if it contains child resource absence records. Once all child resource absence records have been deleted, the parent recurring resource absence record is automatically deleted.

Recurring Resource Absences > RRA0659
Resource Absences

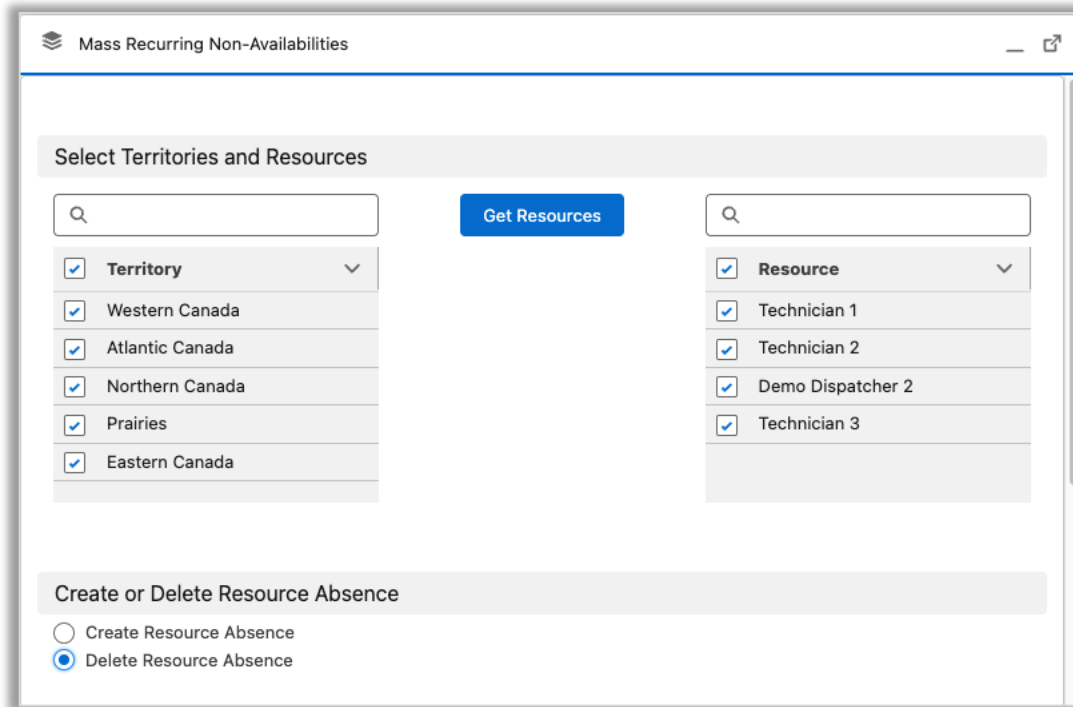
76 items • Sorted by Absence Number • Updated a few seconds ago

☐	Absence Number ↑	Resource	Type	Start Time	End Time	Record Type	Gantt Label
39	☐ RA-115283	Santosh Tech	Meeting	2024-07-31, 9:00 a.m.	2024-07-31, 12:00 p.m.	Non Availability	Team Meeting
40	☐ RA-115286	Vruti	Meeting	2024-05-22, 9:00 a.m.	2024-05-22, 12:00 p.m.	Non Availability	Team Meeting
41	☐ RA-115287	Vruti	Meeting	2024-05-29, 9:00 a.m.	2024-05-29, 12:00 p.m.	Non Availability	Team Meeting
42	☐ RA-115288	Vruti	Meeting	2024-06-05, 9:00 a.m.	2024-06-05, 12:00 p.m.	Non Availability	Team Meeting
43	☐ RA-115289	Vruti	Meeting	2024-06-12, 9:00 a.m.	2024-06-12, 12:00 p.m.	Non Availability	Team Meeting
44	☐ RA-115290	Vruti	Meeting	2024-06-19, 9:00 a.m.	2024-06-19, 12:00 p.m.	Non Availability	Team Meeting
45	☐ RA-115291	Vruti	Meeting	2024-06-26, 9:00 a.m.	2024-06-26, 12:00 p.m.	Non Availability	Team Meeting
46	☐ RA-115292	Vruti	Meeting	2024-07-03, 9:00 a.m.	2024-07-03, 12:00 p.m.	Non Availability	Team Meeting
47	☐ RA-115293	Vruti	Meeting	2024-07-10, 9:00 a.m.	2024-07-10, 12:00 p.m.	Non Availability	Team Meeting
48	☐ RA-115294	Vruti	Meeting	2024-07-17, 9:00 a.m.	2024-07-17, 12:00 p.m.	Non Availability	Team Meeting
49	☐ RA-115295	Vruti	Meeting	2024-07-24, 9:00 a.m.	2024-07-24, 12:00 p.m.	Non Availability	Team Meeting
50	☐ RA-115296	Vruti	Meeting	2024-07-31, 9:00 a.m.	2024-07-31, 12:00 p.m.	Non Availability	Team Meeting
51	☐ RA-115297	Sai	Meeting	2024-05-08, 9:00 a.m.	2024-05-08, 12:00 p.m.	Non Availability	Team Meeting
52	☐ RA-115298	Sai	Meeting	2024-05-15, 9:00 a.m.	2024-05-15, 12:00 p.m.	Non Availability	Team Meeting

Delete Resource Absence Records

To mass delete resource absences, you must first set the criteria for the records you want to retrieve.

1. Click the Mass Recurring Non-Availabilities utility item.
2. Select your service territories and click **Get Resources**.
A list of service resources, filtered by service territories displays.
3. Select the service resources for the absence records that you want to retrieve and then select **Delete Resource Absence**.



Mass Recurring Non-Avabilities

Select Territories and Resources

Search:

Get Resources

Search:

☒ Territory

☒ Western Canada

☒ Atlantic Canada

☒ Northern Canada

☒ Prairies

☒ Eastern Canada

☒ Resource

☒ Technician 1

☒ Technician 2

☒ Demo Dispatcher 2

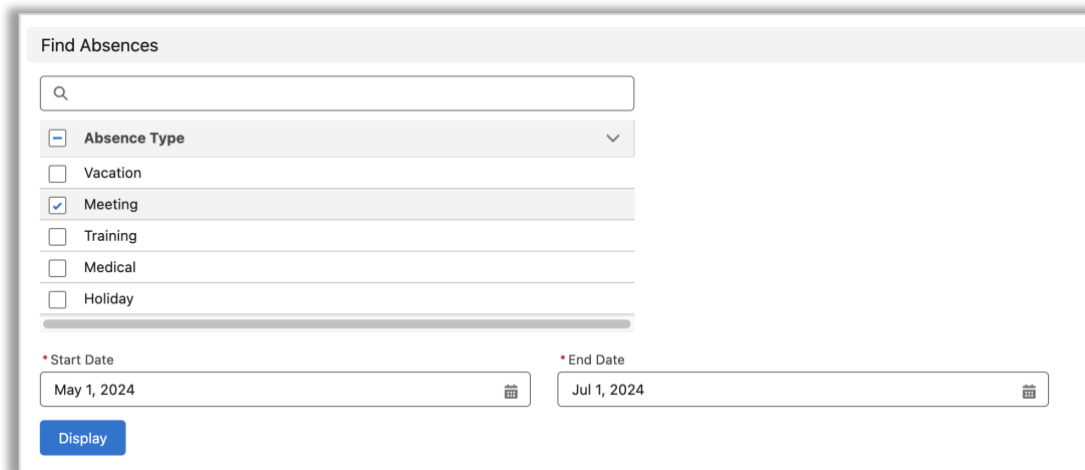
☒ Technician 3

Create or Delete Resource Absence

☐ Create Resource Absence

☒ Delete Resource Absence

- In the Find Absences section, select **Absence Type** from the list. You can select one, many, or all.



Find Absences

Search:

☒ Absence Type

☐ Vacation

☒ Meeting

☐ Training

☐ Medical

☐ Holiday

* Start Date: May 1, 2024

* End Date: Jul 1, 2024

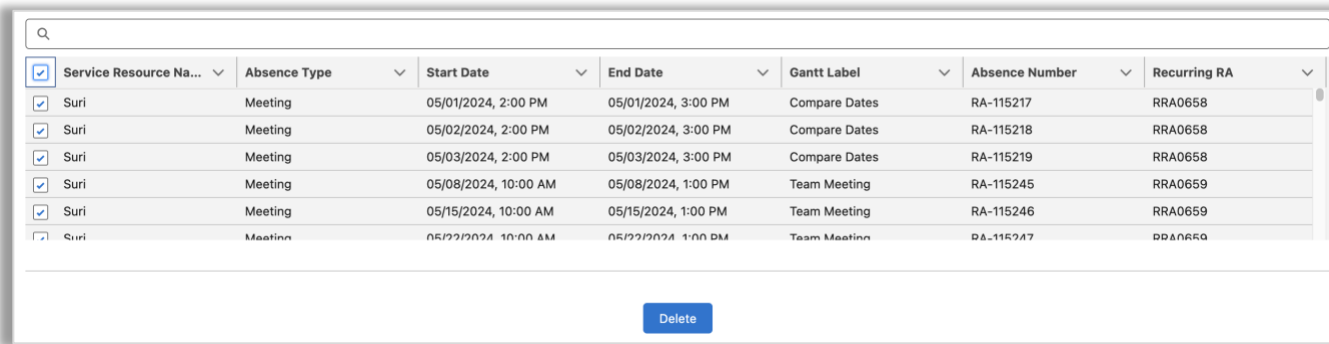
Display

- Select a **Start Date** and **End Date** to set the range for the absence resource records to retrieve.
- Once you have set the criteria for the resource absence records to retrieve, click **Display**.

The table lists the results of the retrieved resource absence records found based on the criteria you set.

In this example, all resource absence records that are Meeting absence type, between

May 1, 2024, and July 1, 2024, for all service resources will display.



☒	Service Resource Na...	Absence Type	Start Date	End Date	Gantt Label	Absence Number	Recurring RA
☒	Suri	Meeting	05/01/2024, 2:00 PM	05/01/2024, 3:00 PM	Compare Dates	RA-115217	RRA0658
☒	Suri	Meeting	05/02/2024, 2:00 PM	05/02/2024, 3:00 PM	Compare Dates	RA-115218	RRA0658
☒	Suri	Meeting	05/03/2024, 2:00 PM	05/03/2024, 3:00 PM	Compare Dates	RA-115219	RRA0658
☒	Suri	Meeting	05/08/2024, 10:00 AM	05/08/2024, 1:00 PM	Team Meeting	RA-115245	RRA0659
☒	Suri	Meeting	05/15/2024, 10:00 AM	05/15/2024, 1:00 PM	Team Meeting	RA-115246	RRA0659
☒	Suri	Meeting	05/22/2024, 10:00 AM	05/22/2024, 1:00 PM	Team Meeting	RA-115247	RRA0659

Delete

7. Review the results. You can use the search/filter component to type criteria to further filter the results.
8. Select all records or a sub-set of the results for deletion. Once selected, click **Delete**.

A success confirmation message will display, indicating the number of records that were successfully deleted.

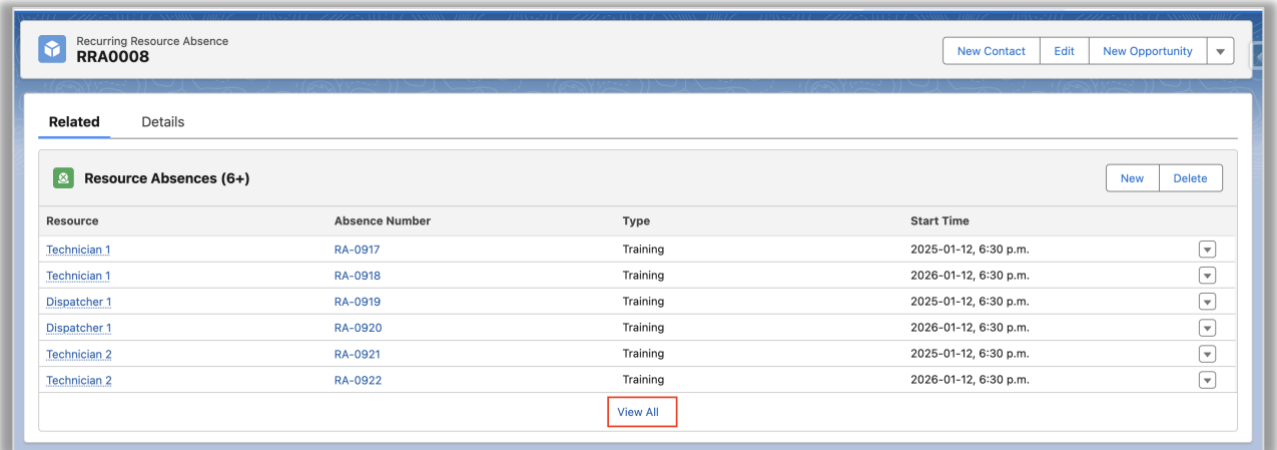
Delete Resource Absences from Recurring Resource Absence Record

With the Mass Recurring Non-Availabilities feature, you can also mass delete resource absence records from the Resource Absences related list on a parent Recurring Resource Absence record.

This functionality allows you to specifically review and target all resource absence records that were created in the series. You can sort by start time to delete all absences in the series for a specific date only or sort by resource to delete all absences in the series for a specific service resource.

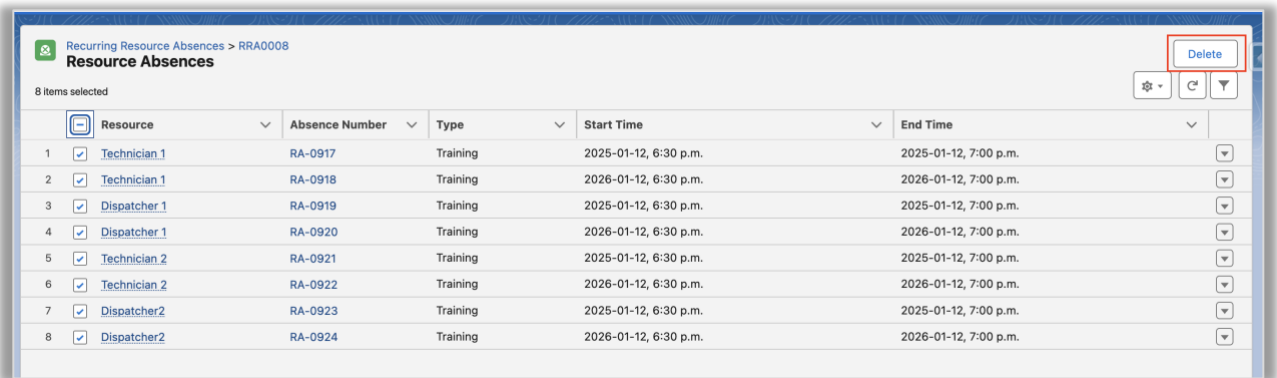
1. Open a Recurring Resource Absence record.
2. Navigate to the Resource Absences related list.

- Click **View All** at the bottom of the displayed list.



You can now select all or many resource absence records that were created in the series.

- Once the desired records are selected, click **Delete**.



A confirmation message will display, and the view refreshed. The selected records deleted.

NOTE: Due to Salesforce limitations, you can only select and delete 200 records at a time. Once all resource absence records are deleted in the series, the parent Recurring Resource Absence record is automatically deleted.

Modify Resource Absence Records

If you need to modify the series of recurring absences, you can only modify them one at a time. For example, if a regularly scheduled team meeting occurs every Wednesday, and now that meeting occurs every Thursday, you must use the mass deletion option to delete the absences and then create new recurring absences.

Feature: Timesheets Management App

The Timesheets Management feature in SFS-X enables mobile technicians to efficiently log daily work time, track totals, and submit Timesheets for approval, all from the Salesforce Field Service mobile app. It supports both manual and automated time entry, with clear approval status indicators to minimize confusion and streamline reviews.

Key Features

- **Weekly View:** Intuitive, scrollable view to manage daily timesheet entries.
- **Approval Status Indicators:** Icon and header colours show if a timesheet is New, Submitted, Approved, or Rejected.
- **Automated Entries:** Timesheet Entries are automatically created for:
 - Service Appointments: Start/End times based on In Progress and Completed statuses
 - Resource Absences: Based on configured start and end time values.
- **Manual Entries:** Technicians create custom entries tied to activities such as pre-work or non-appointment tasks and can add comments.
- **Real-Time Status Visibility:** Each Timesheet shows its current approval status (New, Submitted, Approved, Rejected) via icons and color indicators.
- **Approval Process:** Technicians can submit completed Timesheets for review directly from the weekly view. Submitted Timesheets are sent to a reviewer (defined per technician or defaulted). Supervisors can approve all or select individual entries.
- **Status Management:** Rejected entries can be edited and re-submitted; approved entries are locked.

How it Works

Accessed as a global action from the Field Service mobile app, the Timesheet Management App presents a rolling weekly view of daily timesheets where Technicians can:

- View daily totals and approval statuses
- Navigate to previous or upcoming weeks (based on admin configuration)
- Create and edit manual entries
- Review entries auto generated from Service Appointments and Resource Absences
- Submit daily timesheet for approval

Each Timesheet Entry captures the start, and end times and calculates the total duration. Manual entries may include an activity type and optional comments.

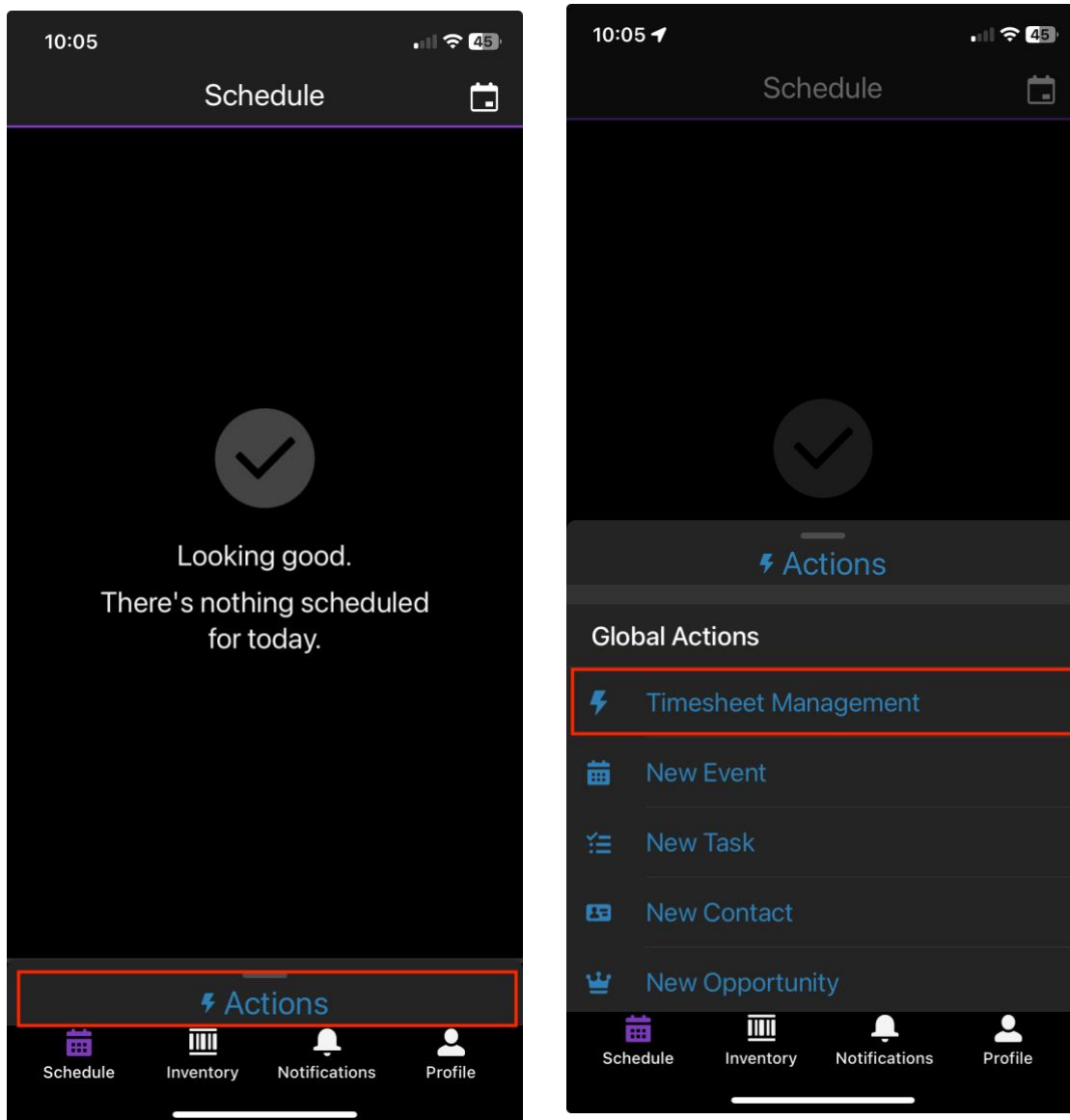
Once submitted, the Timesheet and related Timesheet Entries are locked and sent to a designated reviewer for approval.

Workflow

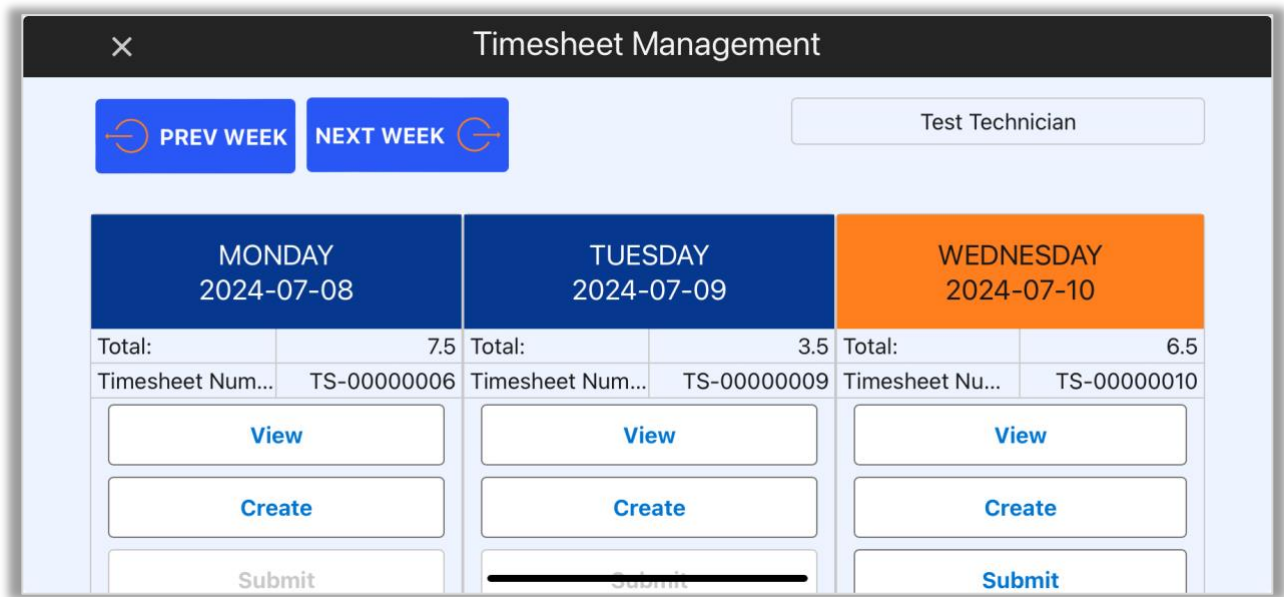
Access the Timesheet Management App

The Timesheet Management App is accessed as a global action from within the Field Service mobile app.

1. In the Field Service mobile app, tap **Actions**.
2. Select **Timesheet Management** under Global Actions.



The Timesheet Management app opens to the current day.



Approval Icons

Within the weekly view of the Timesheet Management app, icons and header colours represent the approval status of each daily timesheet in the weekly view.

Approval Status	Icon	Header Colour
New		
Submitted		
Approved		
Rejected		

Create a Manual Timesheet Entry

1. From the Field Service mobile app, tap the Actions menu, and tap Timesheet Management.
2. Use the week navigation buttons to navigate to past weeks or to upcoming weeks.

NOTE: The ability to navigate back and ahead weeks is configurable, including the number of past and future weeks allowed.
3. Within the weekly view, navigate to a specific date and tap **Create**.
4. In the Timesheet Entry form, enter a **Start Time** and **End Time**.
5. Select a Timesheet Activity.
6. Enter Comments (if configured) and tap **Save**.

The first entry creates a Timesheet for the day. Additional entries are added to that Timesheet until it is submitted.

Edit a Timesheet Entry

Timesheet Entries in **New** or **Rejected** status can be edited. Once a Timesheet is submitted or approved, entries become read-only and cannot be changed.

1. From the weekly view, navigate to the appropriate daily Timesheet and tap **View**.

The list of Timesheet Entries displays.
2. Tap **Edit** next to the entry to be modified.
3. Make the required changes and tap **Save**.

Submit a Timesheet for Approval

1. From the weekly view, select a Timesheet in New status.
2. Tap **Submit**.

The Timesheet and its entries are locked. The defined Timesheet Reviewer receives an approval request.

Automated Entry Creation for Service Appointments

If your org has the functionality enabled, a Timesheet and Timesheet Entry is automatically created for the assigned Service Resource when a dispatched Service Appointment is updated to In Progress.

The table below outlines the sequence.

ACTION	RESULTS
Dispatcher creates a Service Appointment with relevant details from a Work Order and assigns to a Service Resource	The status of the Service Appointment is set to Scheduled. The assigned Service Resource receives a notification on their Field Service mobile app with the Service Appointment details.
Dispatcher updates the status of the Service Appointment to Dispatched.	The Service Resource receives a notification on their Field Service mobile app.
Technician changes the status of the Service Appointment to In Progress.	If one doesn't exist, a Timesheet record for the current date is created for the Service Resource. A Timesheet Entry is automatically created on the Timesheet with the following details: • Timesheet: Timesheet record for the assigned Service Resource for the current date. • Service Appointment: Service Appointment record of the dispatched Service Appointment. • Start Time: the timestamp when the status of the Service Appointment was changed to 'In Progress'. • Timesheet Entry Type: set to Service Appointment The Timesheet/Timesheet Entry displays in the Timesheet Management App for the Technician to review with status set to New.
Technician changes the status of the Service Appointment to 'Completed' or 'Cannot Complete'	The Timesheet Entry record associated with the Service Appointment is automatically updated - the End Time is set to the timestamp when the status changed to Completed or Cannot Complete.
Technician reviews Timesheet Entries and can submit for approval.	The designated Timesheet Reviewer receives notification for the approval request for the daily Timesheet.

Automated Entry Creation from Resource Absence

If your org has the functionality enabled, a Timesheet and Timesheet Entry is automatically created for the Service Resource when a Resource Absence (Non-Availability type) is created.

The table below outlines the sequence.

ACTION	RESULTS
Dispatcher creates a Resource Absence for a Service Resource. (without approval confirmation enabled).	If one doesn't exist, a Timesheet record for the current date is created for the Service Resource and a Timesheet Entry is created for the Timesheet with the following details: • Timesheet: Timesheet record for the assigned Service Resource for the current date. • Resource Absence: Resource Absence record. • Start Time: the start time specified in the Resource Absence record. • End Time: the end time specified in the Resource Absence record. • Timesheet Entry Type: set to Resource Absence The Timesheet/Timesheet Entry displays in the Timesheet Management App for the Technician to review with status set to New.
Technician reviews Timesheet Entries and can submit for approval.	The designated Timesheet Reviewer receives notification for the approval request for the daily Timesheet.

Review Timesheets Submitted for Approval (Timesheet Reviewer / Supervisor)

Once a Timesheet has been submitted by the technician, the assigned Timesheet Reviewer receives a notification for the approval request.

1. When a Timesheet is submitted, the designated **Timesheet Reviewer** for the technician (set on User record) receives a notification.
2. Open the notification and click the **Approval Request**.
3. From the request, click the **Timesheet** record.
4. Review the Timesheet and Entries:
 - Check key fields (e.g., **Date**, **Total**, **Service Resource**).
 - Open the **Timesheet Entries** related list.
 - Click **View All** to sort and evaluate:
 - Entry type (Manual, Service Appointment, Resource Absence)
 - Start/End times and Duration
 - Comments and Activities

Approve or Reject Timesheet

- **Approve All:** From **Approval History**, click **Approve** to approve the full Timesheet and all entries.
- **Selective Approval:** Use **Approve/Reject Entries** action to approve or reject entries individually.

Partial Approval Behavior:

- If any entry is rejected, the full Timesheet is marked **Rejected**.
- The technician sees which entries were rejected and can edit/resubmit.

Feature: Time Rules Engine

The Time Rules Engine automates the classification of technician time into categories such as *Regular*, *Overtime*, or *Doubletime* based on configurable rules. It works with both Salesforce Time Sheets and the SFS-X Timesheets Management App, offering flexibility across different time tracking workflows.

Time categorization is determined by:

- Total hours worked per day
- Day of the week
- Holiday designations

Rules are grouped into Time Rule Sets and assigned to Time Groups based on job role, region, or union agreement, ensuring that each technician's time is categorized accurately and consistently.

Key Features

6. Automated Time Categorization

Logged hours are automatically split into defined time types (e.g., Regular, Overtime, Doubletime) based on thresholds and configured logic.

7. Supports Holiday Logic

Time Rules can recognize holidays configured in Operating Hours, applying alternative categorization rules on those days.

8. Flexible Rule Assignment

Rule Sets are assigned to Time Groups, which control the logic applied to Service Resources over specific time ranges.

9. Compatible with Multiple Time Entry Models

Works with Salesforce Time Sheets or SFS-X Timesheets Management, supporting native or custom time tracking configurations.

How it Works

The Time Rules Engine runs automatically in the background to evaluate each technician's logged hours and categorize them based on your organization's configured rules. When a Time Sheet Entry is created, the system checks if the associated Service Resource belongs to a **Time Group** and the Time Group is assigned to an active Time Rule Set. If both conditions are met, the rules in the set are applied.

Each rule in the set is evaluated in order, based on thresholds, day of the week, and holiday logic. Logged minutes are split and populated into the appropriate custom time type fields (e.g., *Regular*, *Overtime*, *Doubletime*) on the entry. These values roll up to the parent Timesheet record to support total time summaries and payroll export.

Time Rules apply only if:

- The Service Resource is a member of a Time Group.
- A Time Rule Set is assigned to the Time Group for the time period.
- Required custom time type fields exist and are included in permissions.

No user action is required; categorization occurs automatically at creation of a time sheet entry or update.

This ensures that time entries are consistently interpreted according to policy without adding burden on technicians or reviewers.

Getting Started with the Time Rules Engine

The Time Rules Engine is configured and maintained by users responsible for managing time tracking policies, typically individuals in HR, payroll, operations, or system administration roles. These users are responsible for:

- Defining **Time Rules** that reflect organizational time policies.
- Grouping rules into **Time Rule Sets**.
- Assigning Time Rule Sets to the appropriate **Time Groups**.
- Ensuring accurate assignment over time and across Time Groups and Service Territories.

Configuring Time Rules involves setting up a collection of related records that define who the rules apply to, what logic is used, when the rules are triggered, and how long they stay in effect.

To automate time categorization when using Time Sheet Entries in either Salesforce Time Sheets or the SFS-X Timesheet Management App, complete the following setup procedures:

- **Create Time Groups**
Group Service Resources who share common time categorization logic. Each Time Group acts as a container for applying the appropriate rules.

- **Add Service Resources to Time Groups**
Service Resources must belong to a Time Group to ensure the appropriate Time Rule Set is applied. Assignments are date-driven and can be updated as work assignments change.
- **Create Time Rule Sets**
Organize one or more Time Rules into a reusable set. Time Rule Sets allow multiple rules to be grouped and assigned collectively to different Time Groups.
- **Create Time Rules**
Define the logic for categorizing time entries based on conditions such as day of the week, time type, thresholds (e.g., hours worked), or holidays.
- **Assign Time Rule Sets to Time Groups**
Use a Time Rule Set Assignment record to link a Time Rule Set to a Time Group. This determines which rules apply to a given group of workers and when they apply.
- **Define Operating Holiday Hours**
If your organization tracks holiday-specific time (e.g., for premium pay), Time Rules can be configured to recognize designated holidays. Define holidays in Operating Hours and link them to the appropriate Service Territory to ensure correct application of holiday rules.

Create Time Groups

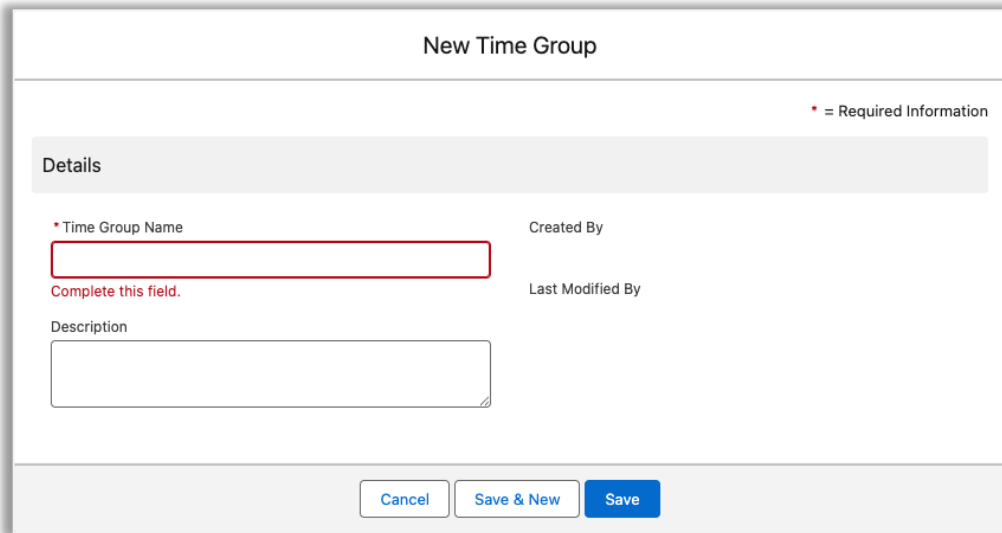
Time Groups are used to apply a specific set of Time Rules to a group of Service Resources. Service Resources are associated with a Time Group through a Service Resource Time Group Member record, ensuring the applicable rules are automatically applied to their Time Sheet Entries.

Create a separate Time Group for each unique combination of rules that must be applied. Time Groups can be organized by job role, union, territory, or labor regulations.

NOTE: A single set of rules (Time Rule Set) can be assigned to multiple Time Groups.

To create a Time Group:

1. From the Time Rules Manager app, navigate to **Time Groups**.
2. Click **New**.
3. Enter a Time Group Name and Description.
 - Use a clear and consistent naming convention to simplify administration.
4. Click **Save** to finish or **Save & New** to create another Time Group.



New Time Group

* = Required Information

Details

* Time Group Name

Complete this field.

Description

Created By

Last Modified By

Cancel Save & New Save

Add Service Resource to Time Groups

A **Service Resource Time Group Member** record links a Service Resource to a Time Group, ensuring the appropriate Time Rules are applied to their Time Sheet Entries. Memberships are time-based and must include a Start Date. An End Date is optional but useful for managing changing work assignments.

To add a Service Resource to a Time Group:

1. Navigate to **Service Resource Time Group Members**.
2. Click **New**.
3. Enter a **Time Group Member Name**.
4. Select a **Service Resource** and a **Time Group**.
 - The selected Service Resource will inherit the Time Rules assigned to the Time Group when logging time.
5. Select a **Start Date** and an **End Date** (optional).
 - The Start Date determines when the membership becomes active.
 - Time Rules from the assigned Time Group will apply as long as both the membership and the Time Rule Set are active.

6. Click **Save** to finish or **Save & New** to add another membership.

New Service Resource Time Group Member

* = Required Information

Information

* Time Group Member Name

* Service Resource

* Time Group

* Start Date

End Date

Important to Know

- **End Date (optional):** Use this field if the Service Resource will switch to a different Time Group in the future. When that happens, create a new membership record for the updated group. If the membership should not expire, leave the End Date blank.
- **Expired Memberships:** When a membership expires, Time Rules no longer apply. The Service Resource can still log time, but time entries will not be categorized into time types.
- **One Active Membership at a Time:** A Service Resource cannot belong to more than one Time Group simultaneously. The system prevents overlapping memberships by validating against existing records. If there is a conflict, an error message displays.

Create Time Rule Sets

Time Rule Sets serve as containers for Time Rules, allowing you to organize rules that share a common purpose, such as for a specific location, job type, or union regulation. A Time Group is linked to a Time Rule Set, which determines how time is categorized for all its Service Resource members.

Because Time Rules must be linked to a Time Rule Set, you can create the Time Rule Set before or while creating a Time Rule.

To create a Time Rule Set:

1. Navigate to the **Time Rule Sets** tab and click **New**.
2. Enter a **Name** and **Description**.
 - Use a clear naming convention to identify the purpose or target group of the rule set.
3. Click **Save**.

The new Time Rule Set is now available for use when creating Time Rules.

Note: Only unassigned (unlocked) Time Rule Sets can be modified. Once a Time Rule Set is assigned to a Time Group, it becomes locked, and its rules can no longer be changed. This includes adding or removing Time Rules from the set.

Create Time Rules

Time Rules define how logged time is categorized into specific **Time Types** (e.g., *Regular*, *Overtime*, *Doubletime*) based on your organization's policies. Rules apply conditions that determine how time entries are allocated, ensuring accuracy and compliance.

Time Rules are grouped within **Time Rule Sets**. When creating a **Time Rule**, you must assign it to a **Time Rule Set**.

You cannot add new Time Rules to a Time Rule Set that is already assigned and active. Once assigned, the set becomes locked to maintain consistent and compliant time tracking logic.

To create a Time Rule:

1. Navigate to the **Time Rules** tab and click **New**.
2. Enter a **Time Rule Name**.

- Use a clear and descriptive name that reflects the rule's purpose and associated Time Group.
3. Select the **Day** to which this rule applies.
 4. Enter a **Threshold** (numeric value).
 - The Threshold defines the maximum number of hours that apply to this rule before the next rule's time type begins.
 5. Select a **Time Type**.
 - Only active Time Types can be selected. This defines how time is categorized *until* the Threshold is met.
 6. Select a **Time Rule Set** from the lookup field to add the Time Rule to.
 - You can only add a time rule to unassigned (unlocked) Time Rule Sets. Once a Time Rule Set is assigned to a Time Group, it becomes locked and cannot be edited.
 - The list only displays unassigned (unlocked) Time Rule Sets. This ensures that only editable sets can be selected.
 - If no suitable set exists, click **+ New Time Rule Set** from the lookup field to create one.

Union Rules							
 All ▼ 							
3 items • Sorted by Union Rule Name • Filtered by All union rules - Holiday, Union Rule Set, Day • Updated a few seconds ago							
	☐ Union Rule Name ↓	Union Rule Set	Day	Time Type	Threshold	Holiday	
1	☐ Monday Regular Time	Monday - Sunday Union Rule Set	Monday	Regular	8.00	☐	▼
2	☐ Monday Overtime	Monday - Sunday Union Rule Set	Monday	Overtime	10.00	☐	▼
3	☐ Monday Doubletime	Monday - Sunday Union Rule Set	Monday	Doubletime	24.00	☐	▼

Rule Behavior and Threshold Logic

Rules for a specific day work cumulatively. The **Threshold** values across rules for a day must add up to 24 hours.

For example, if the following rules are configured for a single day:

Rule Name	Time Type	Threshold
Monday Regular Time	Regular	8.00
Monday Overtime	Overtime	10.00
Monday Doubletime	Doubletime	24.00

Then the behavior will be as follows:

- **Regular time** applies for the first 8 hours.
- **Overtime** applies from 8 to 10 hours.
- **Doubletime** applies beyond 10 hours, up to 24 hours.

NOTE: If no additional rules are needed (e.g., all hours for a day are regular time), configure the Regular Time rule with a Threshold = 24 to ensure full coverage.

Applying Holiday Rules

Holiday Rules allow you to categorize time differently when a Service Resource logs time on a designated holiday. This ensures alignment with your organization's holiday pay policies and helps maintain compliance with labor regulations.

You can mark any Time Rule as a Holiday Rule by enabling the **Holiday** checkbox during rule creation or editing.

How Holiday Rules Work

- When a Time Rule is marked as a Holiday, it only applies if the logged time falls on a designated holiday.
- The system checks whether the current day is a holiday based on the **Operating Holiday Hours** configured in the **Operating Hours** of the assigned **Service Territory**.
- If the day is recognized as a holiday, the system searches for **Holiday Time Rules** in the assigned **Time Rule Set** that match the day of the week.
- If no Holiday rule is found for that day, standard (non-holiday) rules apply.

Steps to Apply a Holiday Rule

1. **Create or Edit a Time Rule.**
2. Enable the **Holiday** checkbox to designate the rule as a holiday-specific rule.
3. Ensure that:
 - The Service Territory associated with the Time Rule Set Assignment has designated holidays configured in its Operating Hours. The Holiday is defined in the Operating Holiday Hours section of the Operating Hours.
 - The Time Rule Set containing the Holiday rule is assigned to a Time Group, and that assignment is active.

If no holidays are defined in the assigned Service Territory's Operating Hours, the Holiday rule will **not** be triggered.

Key Considerations

- A Holiday rule does not replace standard time rules unless the logged time falls on a designated holiday.
- The system automatically checks if the current day is a holiday based on the Operating Holiday Hours of the assigned Service Territory.
- If no Holiday rule exists for a holiday, time logged is categorized using regular (non-holiday) rules.
- To ensure accurate holiday processing:
 - Add designated holidays to each applicable Service Territory's Operating Hours.
 - Validate that the appropriate Time Rule Set Assignments are in place and active.

For detailed instructions on setting holidays, refer to Salesforce documentation:

[Add Holidays to Operating Hours](#).

Assign Time Rule Set to Time Group

A Time Rule Set Assignment links a Time Rule Set to a Time Group, ensuring that the appropriate time rules are applied to Service Resources based on their group membership. This assignment is time-based, allowing you to control when specific rule sets take effect.

How it Works

- Service Resources automatically inherit time rules from the Time Group they belong to.
- The assignment includes a Start Date (required) and optionally an End Date, defining the effective period.
- A Service Territory must be included to support Holiday Rules, as its Operating Hours Holidays determine when holidays are recognized.

To assign a Time Rule Set to a Time Group:

1. Navigate to the Time Rule Set Assignments tab.
2. Click **New** to create a new assignment.
3. Select a Time Rule Set.
 - Only unlocked Time Rule Sets that are not already assigned will be available.
4. Select a Time Group.
 - Choose the Time Group whose members will use the Time Rule Set.
5. Enter **Start Date** (required) and End Date (optional).
 - The assignment will only be active during this period.
6. Select a Service Territory.
 - The Service Territory's Operating Hours Holidays will be referenced for applying holiday-specific rules.
7. Click **Save** to complete the assignment.

After Assignment

- All Service Resources in the selected Time Group will automatically follow the assigned Time Rule Set.
- A Service Resource cannot belong to more than one Time Group for the same time. This ensures that only one set of time rules is applied at any given time and prevents conflicts in time categorization.

- A Time Group cannot have more than one Time Rule Set Assignment that overlaps during the same date range. Each Time Group can only have one active assignment at a time.

Cloning a Time Rule Set

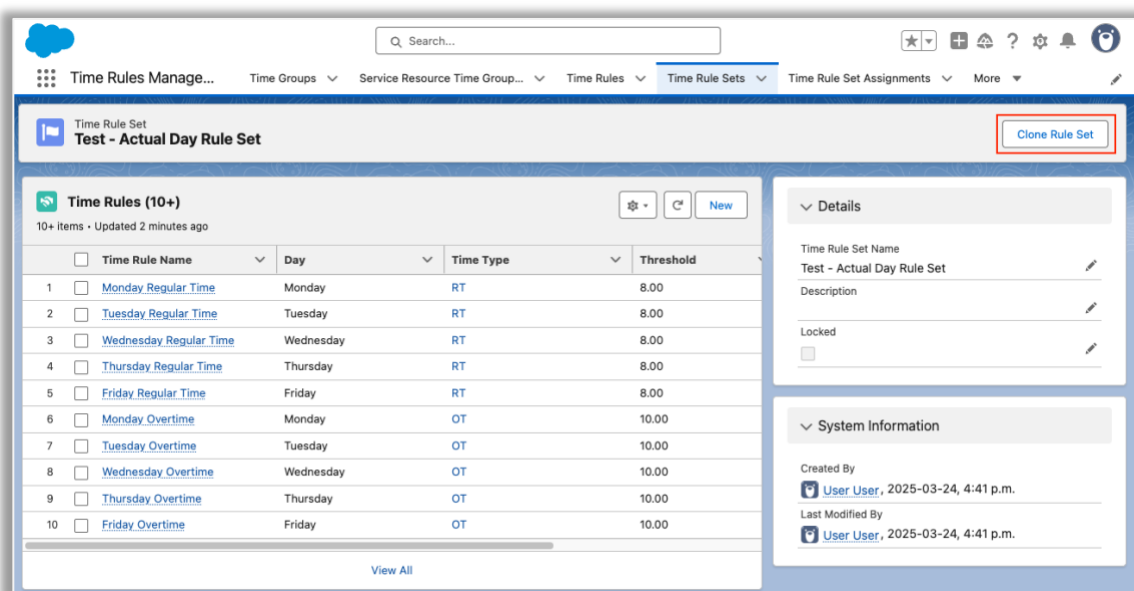
Cloning a Time Rule Set allows you to quickly create a new configuration based on an existing rule structure. This is especially useful when you need similar rules for different Time Groups or want to revise policies without impacting the original rule set.

You should clone a Time Rule Set when you need to:

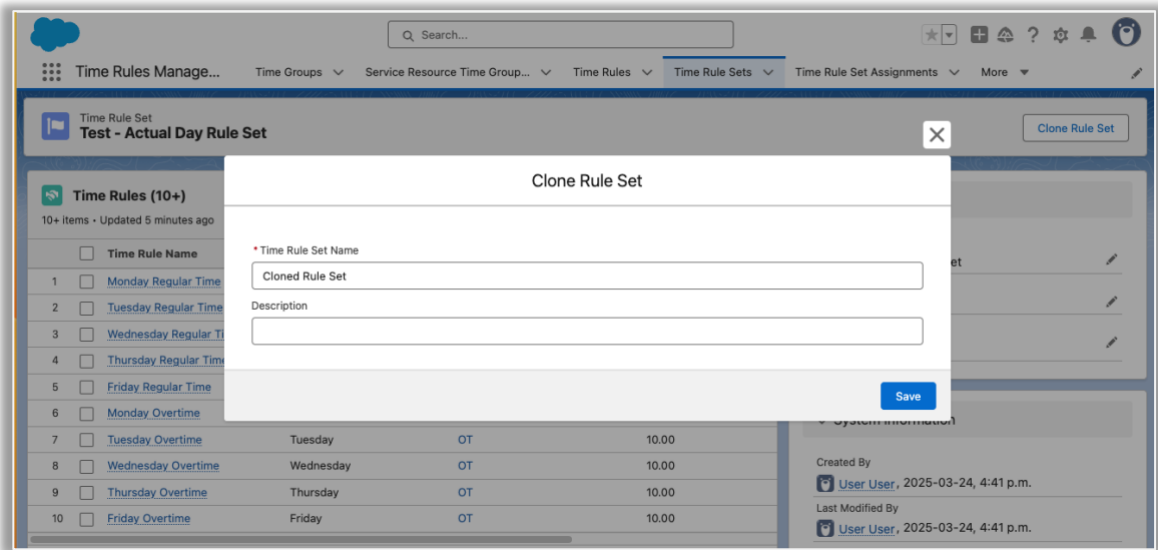
- Create a new Time Rule Set with minor adjustments while keeping the original unchanged.
- Apply a similar structure to a different Time Group without manually re-creating each rule.
- Adjust rules for specific scenarios such as unique work schedules (e.g., weekdays vs. weekends).

To clone a Time Rule Set:

1. Navigate to the **Time Rule Sets** tab.
2. Open the Time Rule Set you want to clone.
3. Click the **Clone Rule Set** quick action.



4. Enter a new **Time Rule Set Name**.
Use a descriptive name that clearly distinguishes the cloned set from the original.



5. Click **Save**.
- The new Time Rule Set is created with new child Time Rule records that are a copy of the original. These Time Rules can now be modified, and the set can be assigned to a Time Group.
6. Review and modify the cloned Time Rules as needed. Adjust Thresholds, Time Types, or Day, based on your new requirements.
 7. If applicable, assign the cloned Time Rule Set to a Time Group by creating a new Time Rule Set Assignment.

Key Considerations

- The cloned Time Rule Set does not inherit any previous assignments. It must be assigned separately.
- Any modifications to the cloned set do not impact the original Time Rule Set.
- Ensure that cloned rules align with applicable policies before assigning them to a Time Group.

Reviewing Time Rules: Time Entry and Categorization

Once Time Rules are configured and assigned correctly, Service Resources can log time through either Salesforce Time Sheets or the SFS-X Timesheets Management feature (depending on what your organization has configured). The system automatically applies the appropriate Time Rule Set based on the user's Time Group and evaluates the logged hours against active rules for the given day.

This section provides a real-world example of how time is split and categorized automatically when a Service Resource enters hours.

Example Scenario Configuration:

- Time Group: Field Techs – Weekday Rules
- Assigned Time Rule Set: Weekday Hours
- Time Rules for Monday:
 - *Regular*: up to 8 hours
 - *Overtime*: 8 to 10 hours
 - *Doubletime*: beyond 10 hours

Logging and Categorizing Time

1. Navigate to Time Sheets and open the Time Sheet record for the desired week.
2. Create Time Sheet Entries for Monday and enter time.
For example, on Monday, the Service Resource logs:
 - Total Hours: 11.5
3. Review categorized time.

The system automatically categorizes the time according to the assigned Time Rule Set:

Day	Logged Hours	Categorized as
Monday	8	Regular
Monday	2	Overtime (up to 10)
Monday	1.5	Doubletime (10+)

Note: Categorized values are displayed in the Time Sheet Entry record and reflect the rules in effect for the date, Time Group, and assignment.



How It Works

- The system checks the Time Group membership and looks for an active Time Rule Set Assignment on the entry date.
- Based on the day of the week and defined thresholds, it determines how the logged time should be split.
- Time is automatically categorized into Regular, Overtime, or Doubletime as defined in the active Time Rule Set.

Tips for Verifying Categorization

- Confirm the Service Resource is assigned to the correct Time Group for the relevant period.
- Ensure a valid Time Rule Set Assignment exists and is active for the date of the time entry.
- Make sure Time Rules account for all 24 hours in a day.
- Review the categorized fields in the Time Sheet Entry to confirm how time was split.

Troubleshooting Common Issues

Issue	Possible Cause	Resolution
Time not categorized for Service Resource	No active Time Rule Set Assignment, or not a member of a Time Group.	Create or update Time Rule Set Assignment Confirm Time Group membership.
Holiday rule not applied	Holiday hours not defined for the Service Territory linked to Time Rule Set Assignment for the Service Resource.	Add holiday dates to the Operating Hours of the assigned Service Territory
Unable to edit a Time Rule	Time Rule Set is locked due to assignment.	Clone the Time Rule Set to create a new editable version
Time is only categorized as Regular, even when more hours are logged for the day	Missing other time type (e.g Overtime or Doubletime) rules for that day, or thresholds not defined properly.	Review and update Time Rules for that day to include all expected thresholds and time types.
Time Rule Set not visible when creating a Time Rule	Time Rule Set is already assigned (locked) and not available for selection in the lookup field.	Create a new Time Rule Set or clone an existing one to add the rule.
Time entries not categorized after Time Rules Engine setup	Start Date on Time Rule Set Assignment or Time Group Membership is in the future or incorrect.	Confirm that the current date is within the start and end dates for both the assignment and group membership.

Best Practices

Follow these best practices to ensure the Time Rules Engine is configured accurately and functions reliably across your organization.

Configuration & Setup

- Use consistent naming conventions for Time Groups, Rule Sets, and Time Rules to make them easy to manage and identify.
- Ensure all Time Rules for a given day account for up to 24 hours. If only Regular time is needed, set the threshold to 24.
- Plan rule structures before assignment. Once a Time Rule Set is assigned, it becomes locked and cannot be modified.



- Always test Time Rules in a sandbox environment before deploying to production.

Time Group & Assignment Management

- A Service Resource cannot belong to more than one Time Group during the same time. An error displays in this scenario to prevent overlapping memberships.
- Each Time Group can have only one active Time Rule Set Assignment at a time. An error message displays in this scenario to prevent overlapping date ranges across assignments.
- Keep Time Group membership records current. Use End Dates for temporary assignments and create new records for changes.

Holiday Rules

- Define holidays in the Operating Hours of each applicable Service Territory to ensure Holiday Time Rules are applied correctly.
- Use the Holiday checkbox when creating Time Rules for holiday categorization—these will only apply if the entry falls on a configured holiday.
- If no Holiday rule is present for a designated holiday, the system will fall back to standard Time Rules for that day.

Validation & Troubleshooting

- Review Time Sheet Entries to verify time is categorized correctly after rules are applied.
- Check Time Rule Set Assignment dates and Group membership dates if categorization is not applied.
- Clone and modify Rule Sets instead of editing locked sets—this preserves historical accuracy and prevents disruptions.
- When troubleshooting, always confirm that the Service Resource is assigned to the correct Time Group and that an active Time Rule Set Assignment exists for the date in question.