Work.com

Salesforce, Spring '22

@salesforcedocs

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PROMOTE WELLNESS AND PRODUCTIVITY WITH WORK.COM

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Build trust with your business, employees, and customers. Empower your employees to be productive and engaged from anywhere. With the apps and services available in Work.com, become a more resilient organization and respond to major events, such as the current COVID-19 crisis.

We built Work.com as a suite of solutions to help organizations build trust and resilience, meet new workplace challenges, and get back to growth. Work.com helps you ensure safe and continuous workplace operations, build trust, and communicate openly with customers. Use the Work.com products to prioritize employee wellness and productivity whether they're returning to the office or working from anywhere.

The Work.com solution is an ecosystem of many products including the Workplace Command Center, Employee Workspace, Shift Management, Emergency Response Management and more. Work.com provides a framework for organizing critical information from various sources such as government policies, regional health data, and company information, so you make informed decisions and take appropriate action. Work.com also provides a single pane of glass for centralizing employee data, apps, company communications, and more. Employees have everything they need to be productive in one place, regardless of where they're working from.

Workplace Command Center

Start using Work.com with Workplace Command Center, your company's operations hub as you begin to reopen after a major event, like COVID-19. Monitor your facilities and make informed decisions to return your employees to their workplaces safely.

Employee Workspace

Empower your employees to work from anywhere and be productive and engaged. With Employee Workspace, give your employees an integrated experience and enable employee productivity and collaboration. Employee Workspace provides a central hub for tools and resources your employees need to work from anywhere.

Employee Concierge

Add Employee Concierge to Employee Workspace to set up a searchable knowledge base and ticketing system so employees can find solutions and get support when they need it.

Employee Concierge Bot

Give your employees concise answers to quick questions. With Employee Concierge Bot, your employees can find case statuses and get frequently asked questions answered rapidly.

IT Service Center

With IT Service Center, IT agents can autonomously troubleshoot and resolve issues faster with real-time visibility into any employee endpoint using automated IT service management functionality. Agents can also view live asset data and take action on incidents before they impact business operations.

HR Service Center

HR Service Center helps companies quickly pivot to a hybrid work environment with out-of-the-box HR processes, enabling increased productivity and employee engagement while reducing operational costs.

Get Started with Employee Service Catalog

A service catalog is a portfolio of the products and services you provide to your employees. Employee Service Catalog helps you turn your employees' requests for those products and services into approved and documented orders.

Employee Field and Case Feed Visibility for Work.com

Custom solutions are available for you to hide sensitive information contained in the Employee field and the case feeds of the Work.com ticketing systems.

Shift Management for Work.com

Guiding your employees back to work isn't as simple as reopening your offices. Organizations must balance workplace coverage and employee availability while creating occupancy models that enable a safe return to work. Shift Management streamlines the process of getting your employees back to work safely.

Workplace Strategy Planner

Use Workplace Strategy Planner with Workplace Command Center to help you decide when to open or close workplace locations. With Workplace Strategy Planner, add business priorities, operating guidelines, and COVID-19 data to your Work.com org. Set thresholds on metrics to evaluate the risk level at each workplace location. Use dashboards to visualize all the data in one place and to help guide operating decisions.

Sales Enablement (myTrailhead) for Learning and Wellness

With Sales Enablement (myTrailhead), you can give your employees all the info they need to get back to work and stay healthy. With Trail Tracker and Trail Tracker for Work.com, you can keep tabs on the badge completion trends at specific workplace locations and across your whole company. And with that information, you can decide when it's time to reopen for business.

Contact Tracing for Employees

With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees.

Digital Trust Cards

Show your customers how you keep them safe as your business reopens during COVID. Trust Cards are a great way to give customers peace of mind in these uncertain times. Create a Trust Card for each of your business locations, and publish these trust cards on your website. Each trust card displays location trust measures, or COVID safety protocols that your business follows.

Control Customer Flow with Queue Management

Bring customers back to your business safely and efficiently. Let customers join a digital queue, and notify them when it's their turn to enter.

Broadcast Messaging in Work.com

Send SMS messages to up to 2,000 recipients at once. You can send messages automatically with Process Builder or manually from your contact, person account, employee, or messaging user list views. Use Broadcast Messaging with Queue Management, Wellness Check, and Contact Tracing.

Explore the Work.com Trial Org

Sign up for a free Work.com trial org to check out the Salesforce apps that can help you get back to work safely.

SEE ALSO:

Work.com Release Notes

Salesforce Work.com Learning Map

Emergency Response Management for Public Health

Emergency Response Management for Public Sector

Configure Safety Cloud

Security Guidance for Work.com

Work.com Developer Guide

Mulesoft Accelerator for Work.com

Workplace Command Center

Start using Work.com with Workplace Command Center, your company's operations hub as you begin to reopen after a major event, like COVID-19. Monitor your facilities and make informed decisions to return your employees to their workplaces safely.

To return to the workplace, executives and operations managers must monitor facilities not just by locations, but by sublocations, such as the floors of a building. The Work.com data model allows you to define these sublocations and monitor them in Workplace Command Center.

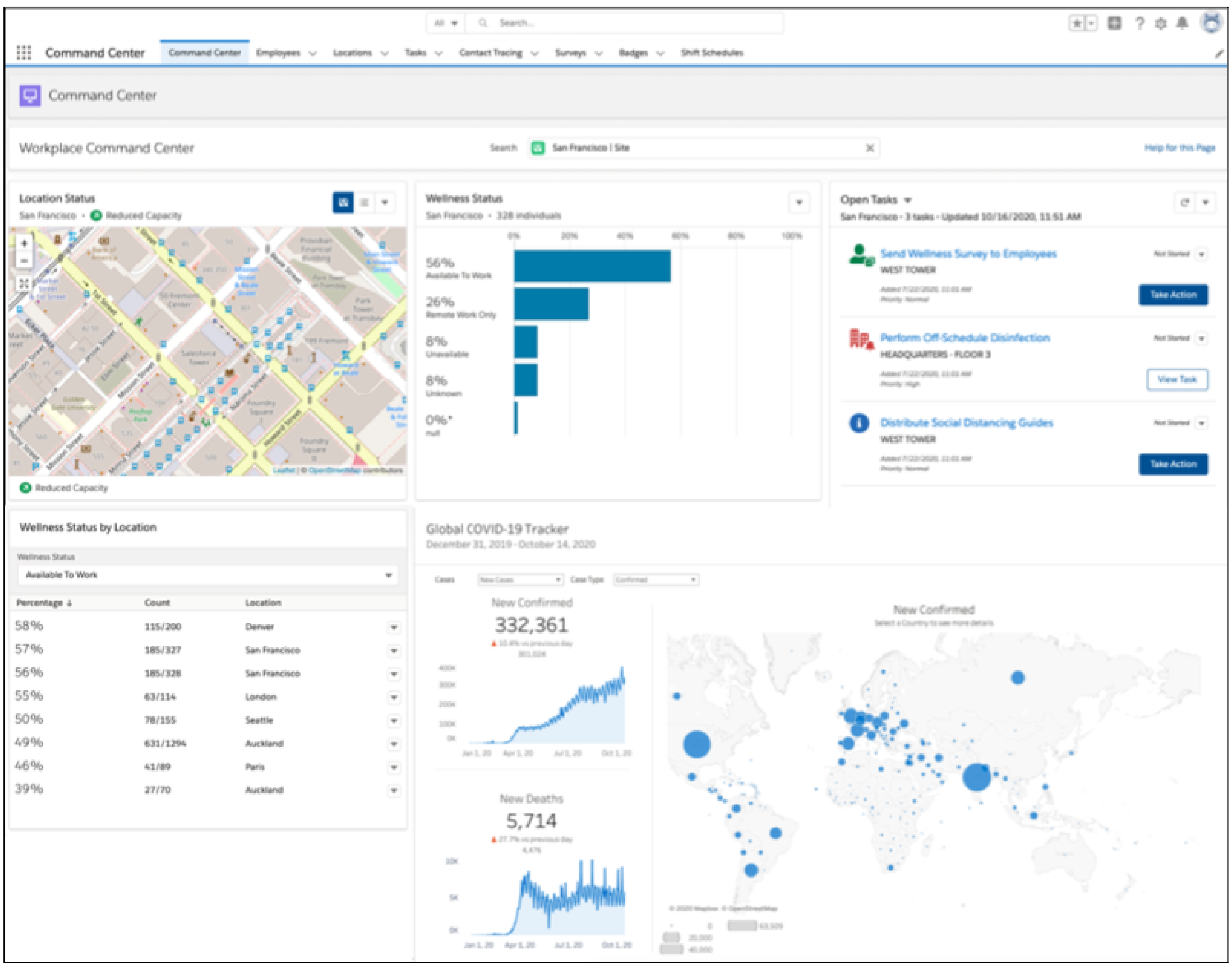
Workplace Command Center includes an operations feed that puts important tasks in your view. It is also extensible and customizable. Install products from our partners and from Salesforce, such as Shift Management and Trailhead Tracker, to bring more data into view and enable more plans of action from one central hub. Or, use our Salesforce app development tools to customize your Workplace Command Center experience.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.



When you install Workplace Command Center, you also get Wellness Check surveys. Use Wellness Check surveys to request wellness updates from employees. View their aggregate responses in the command center. Wellness Status components show managers who's available to work at a location, who's unavailable to work, and who's available to work remotely.

Set Up Workplace Command Center

To set up Workplace Command Center, configure general settings and use our installer service to add the packages and complete some configuration automatically. Then follow the post-installation steps and import data to finish your setup. Make sure to follow the configuration and installation steps in order.

Gather Data with Wellness Check

Use Wellness Check to send wellness surveys to employees. Wellness surveys assess employees' readiness to return to the workplace. Survey responses update the employee data model. This data is captured in the Employee Crisis Assessment, Employee, and Authorization Form Consent records, and visualized through aggregated charts in the Command Center.

All Systems Go! Use Workplace Command Center

Workplace Command Center gives you a top-down view of the readiness states of the workforce and locations of your business. You can use Workplace Command Center to organize critical information such as regional health data and information about your company that pertain to your recovery path. Workplace Command Center can help you resume your business in an orderly, safe, and manageable way.

SEE ALSO:

Work.com Developer Guide

Set Up Workplace Command Center

To set up Workplace Command Center, configure general settings and use our installer service to add the packages and complete some configuration automatically. Then follow the post-installation steps and import data to finish your setup. Make sure to follow the configuration and installation steps in order.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Important: To limit access to employee data, Salesforce strongly recommends that you install Work.com apps, including Workplace Command Center, in an org that's used only for human resources. This way, only Work.com admins have access to employee data, but admins for your company's other orgs don't.

These setup instructions are for new Work.com orgs to install and configure Workplace Command Center, Wellness Check, and Shift Management.

For an existing configuration, review the most recent Work.com Release Notes and review Update an Existing Workplace Org on page 42 section in Salesforce Help.

If you installed Workplace Command Center version 2 and didn't complete your configuration, refer to the Workplace Command Center Setup Guide Version 2in the Trailblazer Community.

1. Configure General Settings for Workplace Command Center

   Before you can install Workplace Command Center and Wellness Check packages, configure these general settings in your org.

2. Install Workplace Command Center and Wellness Check

   Install the Workplace Command Center and Wellness Check packages. Then return to Salesforce Help to complete setup in your org.

3. Assign Workplace Command Center Permissions

   Permissions control what users see and do. The workplace permissions are automatically created when you install the Workplace Command Center package, but you must manually assign users their appropriate permissions.

4. Configure the Command Center

   Before you roll out the Command Center to users, clone it and activate it.

5. Configure Wellness Check

   To configure Wellness Check features, create authorization records for consent management, then use the Command Center Settings tab in the Command Center app. Consider configuring an organization-wide reply-to name and email address, and consider adding the My Wellness component to an Experience Cloud site.

6. Create and Import Data

   To create data, get to know the Work.com data model.

7. View Log Messages from Workplace Command Center and Wellness Check

   When logging is enabled, Workplace Command Center and Wellness Check add errors and exceptions as log messages to the Command Center Logs custom object.

8. Update an Existing Workplace Org

   Workplace Command Center is a managed package. New versions of the package are pushed to orgs automatically, but sometimes include features that need further configuration.

9. Workplace Command Center Limitations and Allocations

   A crisis recovery solution as flexible as Workplace Command Center doesn't come without some limitations. Consider the impact on your users and your overall business solution as you design your return-to-work strategy.

Configure General Settings for Workplace Command Center

Before you can install Workplace Command Center and Wellness Check packages, configure these general settings in your org.

1. Brand the Org

   Rally your team around your brand with a set of custom brand images and colors in your org. We call them themes. You can choose one of the built-in Salesforce themes, or create your own custom themes with just a few clicks.

2. Enable Translation Workbench

   Translation Workbench lets you specify languages you want to translate, assign translators to languages, create translations for customizations you've made to your Salesforce org, and override labels and translations from managed packages. Everything from custom picklist values to custom fields can be translated so your global users can use all of Salesforce in their language.

3. Enable Digital Experiences for Workplace Command Center

   Wellness Check surveys are sent via unique links that don't require employees to log in unless you make authentication a requirement. To create these links, Workplace Command Center uses guest user profiles.

Brand the Org

Rally your team around your brand with a set of custom brand images and colors in your org. We call them themes. You can choose one of the built-in Salesforce themes, or create your own custom themes with just a few clicks.

Tip: You don't have to brand your org, but it's an easy way to get off to a good start.

1. From Setup, enter `Themes in Quick Find`, and choose **Themes and Branding**.
2. Click **New Theme**.
3. Under Branding, change the image to your organization's logo.
4. Click **Save** and **Activate**.

SEE ALSO:

Brand Your Org in Lightning Experience

Enable Translation Workbench

Translation Workbench lets you specify languages you want to translate, assign translators to languages, create translations for customizations you've made to your Salesforce org, and override labels and translations from managed packages. Everything from custom picklist values to custom fields can be translated so your global users can use all of Salesforce in their language.

Translation Workbench isn't available for single-language orgs. If you aren't sure whether you have a single-language or multi-language org, contact Salesforce.

1. From Setup, enter `Translation Language Settings` in the Quick Find box, then select **Translation Language Settings**.
2. On the welcome page, click **Enable**.

   Note: The Manage Translation permission is enabled by default in the System Administrator profile.

Enable Digital Experiences for Workplace Command Center

USER PERMISSIONS

To enable digital experiences:

- Customize Application

Wellness Check surveys are sent via unique links that don't require employees to log in unless you make authentication a requirement. To create these links, Workplace Command Center uses guest user profiles.

Important: Starting in Spring '21, Community Cloud is now called Experience Cloud. The new name better reflects the many types of connected digital experiences you can create—including portals, websites, help centers, forums, and mobile apps.

So what's different? Terminology, for starters. Whether you're creating a forum, portal, or any other type of digital experience, at the most basic level, you're building an online site. So, for example, instead of saying *community*, which primarily connotes a forum where people interact with one another, we now use the term *site* or *Experience Cloud site*. For details, see the Salesforce Spring '21 Release Notes.

These changes affect all Salesforce orgs using Community Cloud. Winter '21 production orgs running Work.com still use the old Community Cloud names and labels. Spring '21 sandboxes running Work.com use the new Experience Cloud names and labels. In the meantime, if you accidentally enter `Community` in the Quick Find box in an org running Spring '21, we automatically display the menu renamed Digital Experiences instead. We know that old habits are hard to break!

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **Digital Experiences** > **Settings**.

   Tip: If you don't see this menu, Digital Experiences might not be available for your Salesforce org. Contact your Salesforce account executive.

2. Select **Enable Digital Experiences**.
3. Enter a domain name for your sites, and click **Check Availability** to make sure that it's not already in use.

   We suggest that you use something recognizable to your users, such as your company name.

   Important: You can't change the domain name after you save it.

4. Click **Save**.

SEE ALSO:

Enable Digital Experiences

Install Workplace Command Center and Wellness Check

Install the Workplace Command Center and Wellness Check packages. Then return to Salesforce Help to complete setup in your org.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Important: To limit access to employee data, Salesforce strongly recommends that you install Work.com apps, including Workplace Command Center, in an org that's used only for human resources. This way, only Work.com admins have access to employee data, but admins for your company's other orgs don't.

1. Install the Workplace Command Center and Wellness Check Packages
   Use the Work.com installer to install and automatically complete some configuration for the Workplace Command Center managed package and the Wellness Check unmanaged package. Then, follow the prompts to complete the manual, post-installation setup steps.
2. Verify Command Center and Wellness Check Installation and Auto-Configuration
   See what is customized in your org when installing the Workplace Command Center and Wellness Check packages.

Install the Workplace Command Center and Wellness Check Packages

Use the Work.com installer to install and automatically complete some configuration for the Workplace Command Center managed package and the Wellness Check unmanaged package. Then, follow the prompts to complete the manual, post-installation setup steps.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

USER PERMISSIONS

To configure installed packages:
- Customize Application

Before installing the packages, complete the required org setup steps listed here: Configure General Settings for Workplace Command Center on page 5.

Note: Before installing this package, confirm that these Salesforce installer IP addresses aren't within any restricted ranges, or add them to an allowlist:

- 18.214.2.206
- 3.89.46.237
- 52.201.65.75
- 52.2.53.142

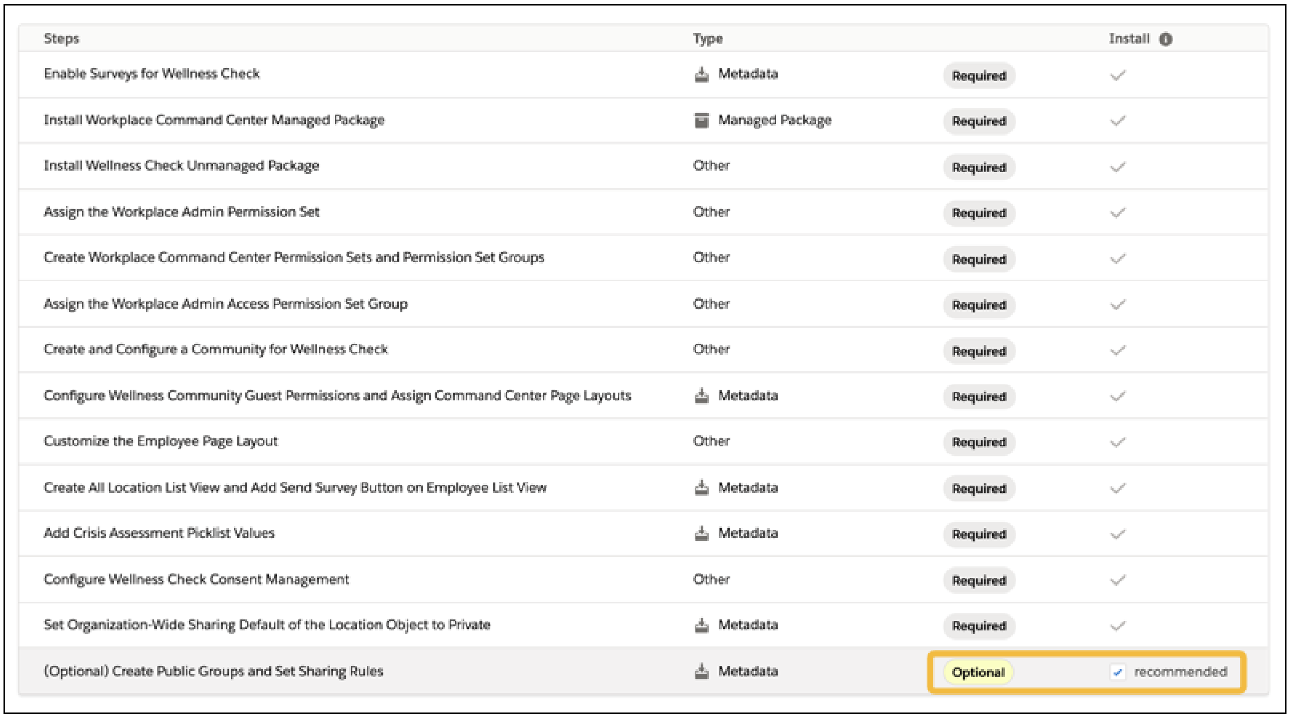
You can remove these IP addresses from your allowlist after installation.

1. Navigate to this URL in your browser: https://install.work.com/

   Note: The Salesforce installer service is used only for the installation and initial configuration of the Workplace Command Center and Wellness Check packages.

2. Click **Operations and Safety** then **Workplace Command Center**.
3. Click **Install and Configure Workplace Command Center**.
4. Click **Log In to Start Pre-Install Validation**.
5. Select your org type. Enter your Salesforce username and password.
6. Click **Allow** to run the pre-installation validation.
7. In the Connected to Salesforce box, confirm that you're logged in to the correct org. *If the pre-install validation fails, use the error messages in the installer to troubleshoot and complete the pre-installation requirements in your org. When you're ready, return to the installer URL and try again.*

8. Review the list of customizations the installer makes in your org. Check the box in the Install column to select **(Optional) Create Public Groups and Set Sharing Rules**. *If you decide not to include this step during installation, review our considerations on* setting up sharing rules for Work.com personas *on page 12 before you set them up manually.*



Steps	Type		Install
Enable Surveys for Wellness Check	Metadata	Required	✓
Install Workplace Command Center Managed Package	Managed Package	Required	✓
Install Wellness Check Unmanaged Package	Other	Required	✓
Assign the Workplace Admin Permission Set	Other	Required	✓
Create Workplace Command Center Permission Sets and Permission Set Groups	Other	Required	✓
Assign the Workplace Admin Access Permission Set Group	Other	Required	✓
Create and Configure a Community for Wellness Check	Other	Required	✓
Configure Wellness Community Guest Permissions and Assign Command Center Page Layouts	Metadata	Required	✓
Customize the Employee Page Layout	Other	Required	✓
Create All Location List View and Add Send Survey Button on Employee List View	Metadata	Required	✓
Add Crisis Assessment Picklist Values	Metadata	Required	✓
Configure Wellness Check Consent Management	Other	Required	✓
Set Organization-Wide Sharing Default of the Location Object to Private	Metadata	Required	✓
(Optional) Create Public Groups and Set Sharing Rules	Metadata	Optional	✓ recommended

9. Click **Install**. Click **Confirm** to accept the terms of use.

During installation, your user is assigned the Workplace Admin permissions that are needed to configure and manage the org.

After a successful installation, complete additional manual configuration as follows.

Create Workplace Operations and Workplace Operations Executive users and add them to their respective permission set groups. And configure Workplace Command Center and Wellness Check, then create and import data into your org.

Follow the prompts throughout the Salesforce Help topics to complete the post-installation configuration.

Note: The Salesforce installer service is available in English, Japanese, French, German, Spanish, and Dutch.

Verify Command Center and Wellness Check Installation and Auto-Configuration

See what is customized in your org when installing the Workplace Command Center and Wellness Check packages.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

Installation step Name	What it Does
Install Workplace Command Center Managed Package	Installs the Workplace Command Center custom objects and fields.
Install Employee Wellness Check Unmanaged Package	Installs the Wellness Check custom object and fields.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Installation step Name	What it Does
Assign the Workplace Admin Permission Set	Assigns the Command Center permission called Workplace Admin to the admin completing the installation and configuration.
Create Workplace Command Center Permission Sets and Permission Set Groups	Creates the permission sets and permission set groups to assign admins, operations managers, and executives custom access to objects and data in the org. To use these permissions, you must manually assign users to the permission set groups.
Assign the Workplace Admin Access Permission Set Group	Gives the admin user the permissions and access needed to complete the Work.com org installation and configuration, and to manage the org after setup.
Create and Configure an Experience Cloud Site for Wellness Check	Wellness Check uses the guest user profile to allow all employees to respond to surveys. Employees click the links to respond to surveys without logging in to Salesforce unless you require authentication for a specific survey that you're sending or scheduling.
Enable Surveys for Wellness Check	Enables surveys.
Configure Wellness Site Guest Permissions and Assign Command Center Page Layouts	Adds survey object permissions to the guest user profile of your Wellness Check site. Assigns customized page layouts for the Address, Location, and Task Salesforce object.
Customize the Employee Page Layout	On the employee page layout, makes the following fields required: • Status As Of • Employee Number • Worker Type • Employee Status
Create All Location List View and Add Send Survey Button on Employee List View	Creates an All Location list view so users can see all locations in your org. Adds Send Survey button to the default search layout on the Employee object so users can send surveys to a list of employees.
Add Crisis Assessment Picklist Values	Adds picklist values for the employee crisis assessment object.
Configure Wellness Check Consent Management	Salesforce consent management features track employee consent to respond to wellness surveys.
Set Organization-Wide Sharing Default of the Location Object to Private	Sets the default access of the Location object to private, so Location records are visible only to the record owners (and people above them in any role hierarchy that you set up). You can edit this setting after installation or extend access to others in the org using sharing rules.
(Optional) Create Public Groups and Set Sharing Rules	Creates recommended sharing rules for workplace admins, operation managers and executives and three public groups, used to assign the sharing rules. To use the recommended sharing rules, you must manually assign users to the public groups.

Assign Workplace Command Center Permissions

Permissions control what users see and do. The workplace permissions are automatically created when you install the Workplace Command Center package, but you must manually assign users their appropriate permissions.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

1. Meet the Workplace Command Center Personas

   The Workplace Command Center package includes permission sets for workplace personas that we recommend for Work.com orgs.

2. Add Workplace Operations and Executive Users

   Create users for your Workplace Operations Managers and your Workplace Operations Executives. Assign them to permission set groups to give them access to Workplace Command Center and related data.

3. Add Workplace Admins

   A Workplace Admin has full access to Work.com data, can access Command Center Settings, and can send surveys. Create system admins only if your organization needs them.

4. Set Sharing Rules for Workplace Personas

   Set sharing rules for Work.com objects so that the right users see the right records in Workplace Command Center. Create your own sharing rules or assign users to the recommended Workplace sharing rules.

5. Review Recommended Workplace Permissions

   When you install and configure Workplace Command Center and Wellness Check following our recommendations, permission sets and permission set groups are created automatically in your org. Review the existing permissions and permission set groups in your org before creating and adding customized permissions.

Meet the Workplace Command Center Personas

The Workplace Command Center package includes permission sets for workplace personas that we recommend for Work.com orgs.

We defined three user personas we expect most organizations need to manage their operations. The Workplace Admin is your Workplace Command Center and Wellness Check administrator. The other personas are planners that use Workplace Command Center to figure out and execute your organization's response to a crisis.

Workplace Admin

A Salesforce system administrator. Full access to Work.com data. Access to Command Center Settings to configure how wellness data is processed. Can send surveys.

> Note: To limit access to sensitive employee and health data stored in Work.com, Salesforce recommends granting admin privileges only to admins who must know the information.

Workplace Operations

An operations manager responsible for one or more departments, regions, or locations at the organization. Can view and edit Work.com records they own or that are shared with them. Can send surveys.

Workplace Operations Executive

An executive responsible for one or more departments, regions, or locations at the organization. Can view and edit Work.com records they own or that are shared with them.

When you install the Workplace Command Center managed package following our instructions, permission sets and permission set groups for each of these personas are added to your org. Review the Workplace Command Center permissions on page 14 for more information on what each permission set adds to your org and how they're organized into permission set groups.

The Salesforce admin that completes the installation process is automatically assigned the Workplace Admin permissions. Decide which persona is right for team members that access your Work.com org. Create users for your Workplace Operations Managers, Workplace Operations Executives, and additional Workplace Admins if you need them, and assign these users the appropriate permission set group.

SEE ALSO:

Review Recommended Workplace Permissions

Add Workplace Operations and Executive Users

Create users for your Workplace Operations Managers and your Workplace Operations Executives. Assign them to permission set groups to give them access to Workplace Command Center and related data.

USER PERMISSIONS

To create permission sets:
- "Manage Profiles and Permission Sets"

To assign permission sets:
- Assign Permission Sets

To create users:
- Manage Internal Users

1. From Setup, enter `Users` in the Quick Find box, then select **Users**.
2. Click **New User**.

   Important: The username must be unique across all Salesforce orgs. The username must be in the format of an email address, for example, jane@salesforce.com, but doesn't need to be a valid account.

3. In the User License field, select **Salesforce Platform**.
4. In the Profile field, select the **Standard Platform User** profile or similar depending on your org's profile settings.
5. Click **Save**.
6. At the top of the page, click **Permission Set Group Assignments** > **Edit Assignments**.
7. Add the appropriate **Permission Set Group**. For executives, add the **Workplace Executive Access Group**; for operations managers, add **Workplace Operations Access Group**.
8. Save your changes.

Note: The Workplace Command Center permission sets and permission sets group are created automatically in your org when you follow our recommended setup. To review these permissions, see Review Recommended Workplace Permissions.

SEE ALSO:

Manage Users

Create a Permission Set Associated with a Permission Set License

Add Workplace Admins

A Workplace Admin has full access to Work.com data, can access Command Center Settings, and can send surveys. Create system admins only if your organization needs them.

USER PERMISSIONS

To assign permission sets:
- "Assign Permission Sets"

To create users:
- "Manage Internal Users"

The admin who installed the Workplace Command Center managed package following our recommended process is automatically assigned the Workplace Admin Access Group. This permission set group gives them the access to manage and configure the org.

Create and grant permissions manually to additional admins only if they're required for your organization.

Note: The Workplace Command Center permission sets and permission sets group are created automatically in your org when you follow our recommended setup. To review these permissions, see Review Recommended Workplace Permissions on page 14.

Note: As of the Summer '21 release, the `UserId` field on the Employee object isn't accessible by default. If necessary, edit the field-level security settings for the relevant permission set or profile.

1. From Setup, enter *`Users`* in the Quick Find box, then select **Users**.
2. Click **New User**.

   Important: The username must be unique across all Salesforce orgs. The username must be in the format of an email address, for example, jane@salesforce.com. The email for this username doesn't have to function.

3. In the User License field, select **Salesforce**.
4. In the Profile field, select the **System Administrator** profile or similar depending on your org's profile settings.
5. Click **Save**.
6. At the top of the page, click **Permission Set Group Assignments** > **Edit Assignments**.
7. Select **Workplace Admin Access Group** and click to add it to the enabled permission sets.
8. Save your changes.

SEE ALSO:

Manage Users

Create a Permission Set Associated with a Permission Set License

Set Field Permissions in Permission Sets and Profiles

Set Sharing Rules for Workplace Personas

USER PERMISSIONS

To create sharing rules:
- Manage Sharing

Set sharing rules for Work.com objects so that the right users see the right records in Workplace Command Center. Create your own sharing rules or assign users to the recommended Workplace sharing rules.

Sharing rules extend data access to users in your Salesforce org by making automatic exceptions to your org-wide defaults. Sharing rules are applied through roles and their internal subordinates or through public groups. Members of public groups can be users, roles, or other groups.

For your Work.com org, we recommend creating public groups and sharing rules for each Workplace planner persona, but set up data access in a way that works best for your company.

The installation process for Workplace Command Center includes an option to automatically create sharing rules and public groups for each Workplace persona. If you select this option during installation, recommended sharing rules are set up and associate with these groups in your org: .

- Workplace Admin Group
- Workplace Operations Group
- Workplace Executive Group

Add users to these groups to grant them access set in the sharing rules.

1. In Setup, enter *`Public`* in the Quick Find box and click **Sharing Settings**.
2. Next to the name of a group, click **Edit**.

3. From the Search dropdown, select the type of person to add to the group. You can select individual users, other public groups, or roles (if used in your organization).
4. Add users, groups, and roles. You can add from all three of these categories before saving.
5. Click **Save**.

If you didn't opt in to auto-create sharing rules and public groups during the installation process, we suggest creating your own, considering the following:

- To view the Command Center, a user needs Read on Employee and Location.
- To send surveys, a user needs Read on Survey and Survey Invitation.
- To create and modify surveys, a user needs Read/Write on Survey and Survey Invitation.
- Sharing for the other objects allows users to view or edit them on their record pages.
- Available rule types vary, depending on the object. For example, sharing for the Employee, Employee Crisis Assessment, Internal Organization Unit, Survey, and Survey Invitation objects can be based on the record owner or criteria. Rules for the Location object can be based on record owner, criteria, or guest user access based on criteria.

If you create your own sharing rules and would like some guidance, refer to our recommendations below, but as always, configure data access in a way that works for your organization. Remember that you also need to create public groups to assign the sharing rules.

	Workplace Admin	Workplace Operations	Workplace Executive
Authorization Form	Read/Write	Read/Write	Read
Authorization Form Consent	Read/Write	Read/Write	Read
Crisis	Read/Write	Read/Write	Read
Employee	Read/Write	Read/Write	Read
Employee Crisis Assessment	Read/Write	Read/Write	Read
Internal Organization Unit	Read/Write	Read/Write	Read
Location	Read/Write	Read/Write	Read
Survey	Read/Write	Read	Read
Survey Invitation	Read/Write	Read	Read

SEE ALSO:

Sharing Rules

Review Recommended Workplace Permissions

When you install and configure Workplace Command Center and Wellness Check following our recommendations, permission sets and permission set groups are created automatically in your org. Review the existing permissions and permission set groups in your org before creating and adding customized permissions.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

1. Workplace Command Center Permission Sets

   If you followed the recommended setup process for Workplace Command Center and Wellness Check, confirm you have these workplace permission sets in your org.
2. Workplace Command Center Permission Set Groups

   The recommended Workplace Command Center permission set groups bundle permission sets for the workplace planner personas. Assign Workplace Command Center users to these permission set groups.
3. Customize Workplace Command Center Permissions

   We recommend that you use our permission sets and permission set groups in your org. But if you need to add or edit the recommended permissions, follow these guidelines.

Workplace Command Center Permission Sets

If you followed the recommended setup process for Workplace Command Center and Wellness Check, confirm you have these workplace permission sets in your org.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Permission Set Name	Description
Workplace Admin	Full access to packaged objects and fields. Access to Command Center Settings and Send Survey UI. Included in the Workplace Command Center package.
Workplace Operations	Access to packaged objects and fields required to use the Command Center. Access to Send Survey UI. Included in the Workplace Command Center package.
Workplace Operations Executive	Read-only access to packaged objects and fields required to use the Command Center. Included in the Workplace Command Center package.
Workplace Command Center Access	Provides access to Workplace Command Center features and assigns the Workplace Command Center license. Created during the installation and configuration process of Workplace Command Center.
Workplace Admin Objects	Full access rights to standard objects and fields related to the Workplace Command Center permission set license. Send surveys. Created during the installation and configuration process of Workplace Command Center.
Workplace Operations Objects	View and edit standard objects and fields related to the Workplace Command Center permission set license. Send surveys. Created during the installation and configuration process of Workplace Command Center.

Permission Set Name	Description
Workplace Executive Objects	View standard objects and fields related to the Workplace Command Center permission set license. View and Edit employees. View surveys. Created during the installation and configuration process of Workplace Command Center.

When you follow the recommended installation and configuration process, these permission sets are automatically organized into permission set groups. Assign permission set groups to users to grant them the required level of access.

When the installation of the Workplace Command Center is complete, the Workplace Admin permission is assigned to the first admin user twice: once directly, as required by the installer service, and once via the Workplace Admin Access permission set group. This is an artifact of the installation process and causes no issue or permission conflict in the org.

Important: Permission updates to the Workplace Command Center package are pushed to our recommended permission sets. Any customizations made to our recommended permission sets are erased when the package updates.

SEE ALSO:

Assign Workplace Command Center Permissions

Workplace Command Center Permission Set Groups

USER PERMISSIONS

To create a permission set group:

- Manage Profiles and Permission Sets

The recommended Workplace Command Center permission set groups bundle permission sets for the workplace planner personas. Assign Workplace Command Center users to these permission set groups.

If you followed the recommended setup process for Workplace Command Center and Wellness Check, these permission set groups are created automatically in your org. But you must manually assign users to these groups.

Each group contains three permission sets that all are created automatically during our recommended setup process:

Workplace Admin Access Group

- Workplace Admin
- Workplace Command Center Access
- Workplace Admin Objects

Workplace Operations Access Group

- Workplace Operations
- Workplace Command Center Access
- Workplace Operations Objects

Workplace Executive Access Group

- Workplace Operations Executive
- Workplace Command Center Access
- Workplace Executive Objects

If you don't have these permission set groups in your org, you can add them using the Update Permissions option from the Command Center Settings.

SEE ALSO:

Assign Workplace Command Center Permissions

Set Sharing Rules for Workplace Personas

Customize Workplace Command Center Permissions

We recommend that you use our permission sets and permission set groups in your org. But if you need to add or edit the recommended permissions, follow these guidelines.

We designed the Workplace Command Center permissions assuming that only a few users with specific roles need access to your Command Center. While we designed these permissions to be sufficient for most Work.com orgs, we recognize that admins sometimes change or add permissions to support unique business requirements

If you need to add to or edit permissions, we strongly recommend that you keep uncustomized versions of our recommended permission sets in your org. *Changing our permission sets or omitting them from permission set groups can impact your org when new versions of the Workplace Command Center managed package are released.*

New versions of the package can include updates to the permission sets. Orgs using our recommended permission sets can easily add these changes to their org using the Update Permissions option included in the Command Center Settings. Orgs that don't use our recommended permission sets may miss important updates. Orgs that modify our permission sets get their customizations overwritten.

Follow these guidelines to make sure your Work.com org is always up to date and able to maintain your customizations:

To add permissions, create new permissions sets and make your additions there. Then include the new permission sets in the permission set groups assigned to your users. Any permission changes included in a Workplace Command Center package update can be made to the recommended permission sets without interfering with your additional permission sets.

To customize or edit permissions, clone our recommended permission sets first. Customize the clones and assign them to permission set groups or users. Any updates to the packaged permissions are available only to our recommended permission sets. If you choose not to use our permissions and prefer your customizations, manually update your cloned permissions when permission changes or additions are introduced in new versions of the Workplace Command Center package.

Changes and updates to the Workplace Command Center package and permissions are included in the Work.com Release Notes. Watch for updates there.

SEE ALSO:

Assign Workplace Command Center Permissions

Configure the Command Center

Before you roll out the Command Center to users, clone it and activate it.

1. Clone the Command Center
   Workplace Command Center includes a Command Center Home Page and a Command Center App Page. Configure either page in Lightning App Builder.
2. Enable Location Search Filtering at All Levels (Optional)
   By default, users can search for level 1 locations only, but you can enable search filtering for locations at any level. This flexibility helps users scope the data shown in several Workplace Command Center components to only the specified location and its sublocations, if any.
3. Make Tasks Tabs Available in User Profiles
   To allow users to see the Tasks object tab, make it available in user profiles.
4. Configure the COVID-19 Tracker Component
   Add the COVID-19 Tracker to the Command Center to show confirmed cases and other metrics from around the world.
5. Create Automated Tasks for the Operations Feed
   The Workplace Command Center Operations Feed component displays a list of tasks assigned to a user.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

USER PERMISSIONS

To create and save Lightning pages in the Lightning App Builder:
- Customize Application

To view Lightning pages in the Lightning App Builder:
- View Setup and Configuration

Clone the Command Center

Workplace Command Center includes a Command Center Home Page and a Command Center App Page. Configure either page in Lightning App Builder.

To edit the Command Center home page, such as adding or removing components, clone it.

1. From Setup, enter `App Builder`, and select **Lightning App Builder**.
2. Next to b2w_CommandCenterHome, click **Clone**.
3. Optionally, configure the Global COVID-19 Tracker Component on page 19.
4. Optionally, make other changes to the page.
5. Update the **Label** value to match the **Developer Name** (for example, change *b2w_CommandCenterHome* to *btw_CommandCenterHome1*).
6. Click **Save**.
7. Click **Activate**.
8. Choose **App and Profile** and click **Assign to Apps and Profiles**.
9. Select **Command Center** and click **Next**.
10. Select one or more profiles and click **Next**.
11. Review the assignments, and click **Save**.
12. Click **Back** to exit Lightning App Builder.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

To edit the Command Center app, such as adding navigation items, clone it. From Setup, click Lightning App Builder and clone the Command Center App Page.

SEE ALSO:

Lightning Page Types

Set Up the Lightning Experience Home Page

Workplace Command Center

Enable Location Search Filtering at All Levels (Optional)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

By default, users can search for level 1 locations only, but you can enable search filtering for locations at any level. This flexibility helps users scope the data shown in several Workplace Command Center components to only the specified location and its sublocations, if any.

When you set the Location Search Filter Level to support all levels of the location hierarchy, that setting is supported by these components.

- Wellness Status
- Wellness Status by Location
- Location Status
- Operations Feed (tasks)

Important: Some Workplace Command Center components don't support filtering at all location levels, at least not fully. For example, Contact Tracing Status doesn't support location search at all levels. We recommend testing all Workplace Command Center components in a Full sandbox with the Location Search Filter Level set to all levels before you enable this feature in your production org.

When users have more filtering flexibility, you can add value for them by creating locations in your data model that represent abstractions, like city neighborhoods or sales regions.

1. From the App Launcher, search for and select **Command Center Settings**.
2. In the Location Search Filter Level section, select **Allow search results for any location in the hierarchy**.
3. Click **Save**.

SEE ALSO:

Create and Import Location and Address Records

Locations and Filtering

Make Tasks Tabs Available in User Profiles

To allow users to see the Tasks object tab, make it available in user profiles.

Users can create tasks directly from the Command Center. From the Operations Feed, click **View Tasks**. Complete these steps to also allow users to open the Tasks tab.

1. From Setup, enter `Profiles` in the Quick Find and click **Profiles**.
2. Click **Standard Platform User**.
3. Click **Edit**.

4. Under Tab Settings, set Tasks to **Default On**.
5. Click **Save**.
6. Repeat these steps for the **Standard User** profile.

Configure the COVID-19 Tracker Component

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Add the COVID-19 Tracker to the Command Center to show confirmed cases and other metrics from around the world.

The COVID-19 Tracker is a standard component of the Workplace Command Center managed package version 2. Work.com orgs with earlier versions of the Workplace Command Center or orgs that have removed the COVID-19 Tracker can add the component back to the Command Center.

The Command Center supports separate trackers to see data Worldwide, restricted to the United States, or a combined Global view. Add one or all of the trackers to the Command Center and specify the component height. All other properties are optional.

1. With the cloned Command Center open in Lightning App Builder, select the component, and enter a value for its properties. To see the changes, press **Enter**.

Property	Description
Public Tableau Worldwide COVID-19 Report URL	https://public.tableau.com/views/CommandCenterv2-GlobalCOVID-19Tracker/COVID-19GlobalCommandCenter.
Public Tableau US COVID-19 Report URL	https://public.tableau.com/views/CommandCenterv2-USCOVID-19Tracker/COVID-19USCommandCenter
Public Tableau Combined Global and US COVID-19 Report URL	https://public.tableau.com/views/CommandCenter-COVID-19Tracker/COVID-19GlobalCommandCenter
Hide Tabs	Prevents dashboards from being shown as tabs. This component doesn't use tabs so the property has no effect.
Hide Toolbar	Hides the toolbar at the bottom of the component.
Height	The height of the component. For best results, enter a value from 750 through 800.

2. Click **Save**.
3. Click **Activation...**.
4. Click App and Profile | Add Assignments and select Lightning Apps and Profiles.
5. Click **Save**.

SEE ALSO:

See COVID-19 Information from Around the World

Create Automated Tasks for the Operations Feed

The Workplace Command Center Operations Feed component displays a list of tasks assigned to a user.

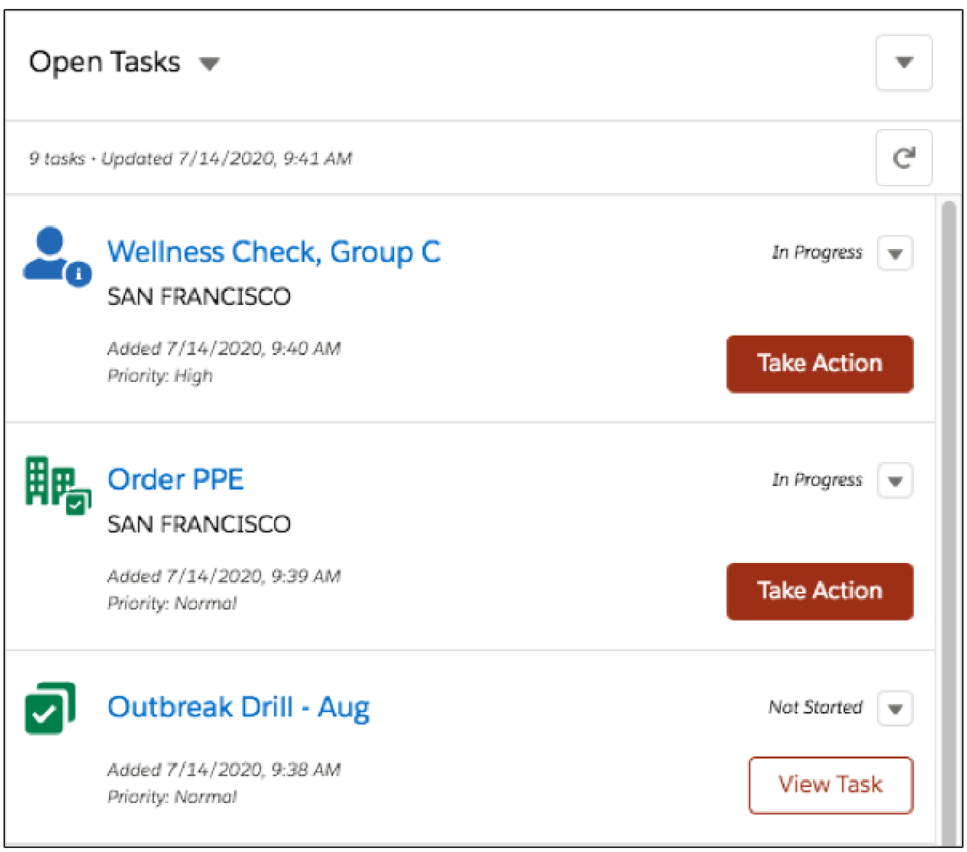
The Operations Feed supports the creation of text-based tasks and tasks associated with a URL, including a record detail page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.



Admins familiar with Salesforce Flow can extend the functionality of tasks by using screen flows and autolaunched flows. Tasks associated with screen flows are ideal when a user must provide or edit information through a form or a series of screens. Tasks associated with autolaunched flows are ideal for initiating processes that can be automated, such as checking and updating records and sending Wellness Check surveys based on a field value in records.

Note: Paused screen flows aren't supported in the Operations Feed.

Both admins and users can create tasks manually for the Operations Feed. To create tasks that call actionable URLs or flows, we recommend that admins configure an automated process.

1. Create Salesforce Flows for Tasks in the Operations Feed

   Flows allow information to pass into and out from tasks in the Operations Feed. When a task begins, the input variables are passed into the flow. When the flow ends successfully, the Operations Feed displays the output variables.

2. Task Record Sharing in Workplace Command Center

   Share task records through a custom lookup location field.

3. Add Run Flows Permissions

   If you add flows to run in Operations Feed tasks, you must grant users the Run Flows permission to take action on a task that includes a flow. We recommend adding this permission only to the Workplace Admin and Workplace Operations Manager personas.

SEE ALSO:

Track Critical Tasks Using the Operations Feed

Create Salesforce Flows for Tasks in the Operations Feed

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Flows allow information to pass into and out from tasks in the Operations Feed. When a task begins, the input variables are passed into the flow. When the flow ends successfully, the Operations Feed displays the output variables.

To pass values into a task, include the following input variables in the flow:

- **TaskId**: Populated with the 18-character Salesforce ID of the task. The flow uses `TaskId` to load in other values from the task if needed.
- **LocationId**: Populated with the 18-character Salesforce ID (if any) that is stored in `Task.Location`.
- **Action Input Variables**: Other values specified in the `Task.ActionInputVariables` field, up to 255 characters of JSON-formatted data. Variables in the JSON that don't exist within the flow are ignored. For formatting, text values have quotes, numerics don't have quotes, and arrays are encapsulated in square braces as shown in this example.

```
{
    "name" : "Admin",
    "age" : 36,
    "rights" : [ "admin", "editor", "contributor" ]
}
```

  If more input variables are needed, additional data can be stored in custom fields or records. Data can be read via the `TaskId`, `LocationId`, or other matching values stored within the Action Input Variables.

For the Operations Feed to automatically display values after a flow-based task completes successfully, include the following output variables in the flow:

- **ReturnMessage**: Text value that is ignored if left null, empty, or missing. This variable is used as the custom success or error message displayed to the user. Required: Data Type = Text
- **IsError**: Boolean, if a successfully ending flow is to be treated as an error, such as when an error condition is caught or handled within the flow. Set this variable within the flow to `True`.
- **Standard Return**: The system-controlled status of the flow that the Operations Feed interprets. This value can't be explicitly defined within the flow. Successful flows, including flows with errors handled within the flow, return the value `FINISHED` or `FINISHED_SCREEN`. Flows with unhandled errors return the value `ERROR`.

Task Record Sharing in Workplace Command Center

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Share task records through a custom lookup location field.

Tasks are related to locations through the custom lookup field, `wkcc__Location__c`. Tasks are visible to the users they're assigned to. You can share tasks with more users in one of the following ways.

- **Use role hierarchy**. Set up role hierarchy, and assign users to roles. Ensure that users who create tasks are added to the lowest level role. That way, all users in higher roles have access to all tasks. For example, say you create a role for the global operations manager with a user. Beneath this role, you add two regional roles with users: one for the West coast operations manager and one for the East coast operations manager. The global operations manager can access all tasks, and each regional manager can access only the tasks under their hierarchy. For more information, see User Role Hierarchy.
- **Assign tasks to a queue**. Create a queue and add the users who manage tasks to it. When creating a task, set the `Assigned To` (`Task.OwnerId`) field to the queue. That way, all users in the queue can see the tasks in the Operations Feed. Ensure that users don't assign tasks to themselves and that the tasks remain assigned to the queue. You can use Process Builder or flows to automate task assignment to a queue for tasks with an action category. For more information about queues, see Set Up Queues. In SOAP API, a queue corresponds to the Group object with the `Type` set to `Queue`. See Group in the Object Reference for Salesforce and Lightning Platform. For more information about Process Builder and flows, see Salesforce Flow.

Add Run Flows Permissions

If you add flows to run in Operations Feed tasks, you must grant users the Run Flows permission to take action on a task that includes a flow. We recommend adding this permission only to the Workplace Admin and Workplace Operations Manager personas.

If your configuration follows the recommended Work.com configuration, we recommend adding the Run Flow permission to Workplace Admin Command Center Objects and the Workplace Operations Command Center Objects permission sets.

1. In Setup, enter *`Permission Sets`* in the Quick Find box. Select **Permission Sets**.
2. Select a permission set to add to.
3. Click **System Permissions | Edit**.
4. Enable **Run Flows**.
5. Click **Save**.

Any user without the Run Flows permission encounters an error if they take action on a task that includes a flow.

Configure Wellness Check

To configure Wellness Check features, create authorization records for consent management, then use the Command Center Settings tab in the Command Center app. Consider configuring an organization-wide reply-to name and email address, and consider adding the My Wellness component to an Experience Cloud site.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

1. Activate Wellness Check Experience Cloud Site
   The Wellness Check site is created in your org when you follow our recommended setup process. Activate the site to use it to send surveys.
2. Configure Wellness Check Survey Mappings
   You control how employee survey responses map to wellness statuses in your org and whether consent records are created when an employee responds to a survey.
3. Configure a Survey Reply-To Name and Email Address
   Increase survey credibility and provide as much assurance as possible that the survey email isn't a phishing attempt by using an organization-wide reply-to name and email address. By default, survey emails use the name and email address of the sending user. If the reply-to name and address in the email is unfamiliar to some recipients, it's possible that you don't get the response rate that you want.
4. Configure Survey Authentication
   To ensure survey responses come from the intended recipients, you can require recipients to authenticate to access the survey. When you require survey authentication, recipients click the link in the survey email they receive and are prompted to authenticate before they can access the survey. By default, surveys don't require authentication, but you can choose to add the authentication requirement when you send or schedule a survey.
5. Manage Wellness Check Survey Translations
   Wellness Check surveys are provided in multiple languages. To modify translations, assign a translator for each language. A user can view and modify surveys in a specific language only when they are assigned as a translator for that language.
6. Activate Wellness Check Surveys
   Wellness Check provides two surveys that you can use as-is, or modify to meet the needs of your organization.
7. Configure the My Wellness Component
   The Workplace Command Center package includes My Wellness, a custom Lightning component. When added to an Experience Cloud site, the My Wellness component helps employees verify that their own reported wellness status is up to date. It also helps employees give prompt responses to wellness surveys by providing a link to the most recent survey waiting for their response. You can add the component to any activated site in orgs where the version 5 Workplace Command Center package is installed.

Activate Wellness Check Experience Cloud Site

The Wellness Check site is created in your org when you follow our recommended setup process. Activate the site to use it to send surveys.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

1. From Setup, search for and select `All Sites`.
2. Next to the Wellness Check site, click **Workspaces**.
3. From My Workspaces, click the **Administration** tile.
4. Under Settings, click **Activate**.

5. Under Emails, deselect **Send welcome email**.
6. Click **Save**.

Configure Wellness Check Survey Mappings

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

You control how employee survey responses map to wellness statuses in your org and whether consent records are created when an employee responds to a survey.

When an employee responds to a wellness survey, their employee record updates to a status based on mappings you create in your org. For example, you can configure the mappings so that when an employee responds `COVID-19 No Symptoms` to your wellness survey they are assigned the `Available to Work` status. Someone that declines to respond to a survey might be assigned the `Remote Work Only` status.

To use Wellness Check, first allow surveys to be sent to the Wellness Check sites. Next, map survey result references to a crisis assessment and then map crisis assessment values to wellness status values. Use our sample mappings if they make sense for your org. If you want to modify these mappings or create your own, read Understand How Survey Pages Map to the Data Model before configuring your survey.

1. From the App Launcher, select **Command Center**.
2. Click the **Command Center Settings** tab.
3. Click **Wellness: Survey Communications**.
4. From the Wellness Check site dropdown, select **Wellness Check**.
5. Click **Save**.
6. Click **Wellness: Survey Assessment and Consent Mapping** and click **+ Add Mapping** to create these mappings that correspond to the wellness surveys:

Survey Result Reference	Crisis Assessment	Survey Language	Authorization Form Text
ref0	`Declined`	English	
ref1	`COVID-19 Symptoms or Exposed`	English	Your Authorization Form Text Name, such as `Wellness Authorization Text`
ref2	`COVID-19 No Symptoms`	English	Your Authorization Form Text Name, such as `Wellness Authorization Text`

7. Click **Save**.
8. Click **Wellness: Status Mapping** and create these mappings between crisis assessment values and wellness status values:

Crisis Assessment	Wellness Status
`Declined`	`Remote Work Only`
`COVID-19 Symptoms or Exposed`	`Unavailable`
`COVID-19 No Symptoms`	`Available to Work`

9. Click **Save**.

Configure a Survey Reply-To Name and Email Address

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Increase survey credibility and provide as much assurance as possible that the survey email isn't a phishing attempt by using an organization-wide reply-to name and email address. By default, survey emails use the name and email address of the sending user. If the reply-to name and address in the email is unfamiliar to some recipients, it's possible that you don't get the response rate that you want.

1. From Setup, in the Quick Find box, enter *`Organization-Wide Addresses`*, then select **Organization-Wide Addresses**.
2. If the address you want to use for survey emails is listed and has a status of `Verified`, go to the next step. If not, define a new organization-wide address for survey emails. For details, see Set Up Organization-Wide Email Addresses.

   Note: An organization-wide email address used for surveys must have a status of `Verified`. If the system can't verify the email address automatically, it sends a verification email to the address. To change the status of the address to `Verified`, the owner of the address must click the verification link in the email.

3. From the App Launcher, select **Command Center**.
4. Click the **Command Center Settings** tab.
5. Click the **Wellness: Survey Communication** tab.
6. In the Survey Reply Display section, select **Use an organization-wide email address**.

   Selecting this option activates the pulldown menu.

7. Select an organization-wide email address and display name from the pulldown menu.
8. Click **Save**.

Configure Survey Authentication

To ensure survey responses come from the intended recipients, you can require recipients to authenticate to access the survey. When you require survey authentication, recipients click the link in the survey email they receive and are prompted to authenticate before they can access the survey. By default, surveys don't require authentication, but you can choose to add the authentication requirement when you send or schedule a survey.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

When you require authentication, you can send a survey only to recipients who are configured to respond with their Salesforce credentials.

- Each recipient must be represented by both an employee record and an associated user record in the Salesforce org. To learn about how you can provision user records for employees, see Automatically Sync Employee and User Records.
- Each recipient must have an email address defined in their employee record.
- Each employee's user must be a member of the Wellness Check Experience Cloud site, and the site must be activated. The Wellness Check site is created in your org when you follow our recommended setup process. If the site isn't activated, see Activate Wellness Check Experience Cloud Site.

When you send or schedule a survey that requires authentication, the number of total recipients shown reflects the number who meet all the requirements. Look for warnings that alert you to problems with the other intended recipients and how many individuals are impacted.

Note: If you require authentication to access a survey scheduled to be sent out multiple times, recipients must authenticate each time they respond to the survey. If you later edit a survey schedule to add or remove the authentication requirement, the change only applies to surveys sent after you save the change to the schedule.

Configure Internal Users for Survey Authentication

In the Wellness Check Experience Cloud site, internal users are employees with full Salesforce licensing capabilities. If you plan to require survey recipients to authenticate to access the survey, configure internal users to respond with their credentials.

Configure External Users for Survey Authentication

In the Wellness Check site, external users are users with Community, Customer Portal, External Identity, or partner portal licenses. If you plan to require survey recipients to authenticate to access the survey, configure external users to respond with their credentials.

Configure Internal Users for Survey Authentication

In the Wellness Check Experience Cloud site, internal users are employees with full Salesforce licensing capabilities. If you plan to require survey recipients to authenticate to access the survey, configure internal users to respond with their credentials.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

In the Wellness Check site, *external* users are users with Community, Customer Portal, External Identity, or partner portal licenses. External users must also be configured to respond if you plan to require survey authentication, but the steps are different. For details, see Configure External Users for Survey Authentication.

1. From Setup, search for and select `All Sites`.
2. Next to the Wellness Check site, click **Workspaces**.
3. From My Workspaces, click the **Administration** tile.
4. Under Login & Registration, select **Allow internal users to log in directly to the site**.
5. Under Members, select the profiles used by survey recipients who must be able to authenticate to access a wellness survey.

   Note: The decision to require authentication is made when a survey is sent or scheduled. You're configuring internal users so that they can authenticate, if needed, not that they have to authenticate to access all surveys.

6. Configure sharing access so that internal site users can access the surveys and survey invitations that they receive.

   Use the sharing mechanism that works best for your data sharing design. For an overview, see Control Who Sees What.

   To use sharing settings to configure read-only access to all surveys and survey invitations by all internal users, follow these steps.

   a. From Setup, search for and select `Sharing Settings`.
   b. Create a Survey sharing rule that shares read-only access to records owned by All Internal Users to the All Internal Users group.
   c. Create a Survey Invitation sharing rule that shares read-only access to records owned by All Internal Users to the All Internal Users group.

SEE ALSO:

Create Experience Cloud Site Users

Configure External Users for Survey Authentication

In the Wellness Check site, external users are users with Community, Customer Portal, External Identity, or partner portal licenses. If you plan to require survey recipients to authenticate to access the survey, configure external users to respond with their credentials.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

The Wellness Check site's *internal* users are employees with full Salesforce licensing capabilities. Internal users must also be configured to respond if you plan to require survey authentication, but the steps are different. For details, see Configure Internal Users for Survey Authentication.

1. From Setup, search for and select `All Sites`.
2. Next to the Wellness Check site, click **Workspaces**.
3. From My Workspaces, click the **Administration** tile.
4. Under Emails, select **Send welcome email**.

   The welcome email gives new site members an opportunity to create a password.
5. From Setup, enter `Digital Experiences` in the Quick Find box, then select **Digital Experiences** > **Settings**.
6. Under Role and User Settings, select **Allow using standard external profiles for self-registration and user creation**.

SEE ALSO:

Create Experience Cloud Site Users

Manage Wellness Check Survey Translations

Wellness Check surveys are provided in multiple languages. To modify translations, assign a translator for each language. A user can view and modify surveys in a specific language only when they are assigned as a translator for that language.

1. From Setup, enter `Translate` and click **Translation Language Settings**.
2. Click **Add**.
3. Select a Language.
4. Select a user and click **Add** to add them to the list of translators for that language.
5. Click **Save**.

When the user opens the survey, they can choose **Languages** and click to edit the translation.

SEE ALSO:

Translate Your Surveys

Activate Wellness Check Surveys

Wellness Check provides two surveys that you can use as-is, or modify to meet the needs of your organization.

- Return Readiness
- Continuing Wellness

Before you use the surveys, activate them.

1. From the App Launcher, enter `Sur` and click **Surveys**.
2. Select **All Surveys**.
3. Select **Continuing Wellness** > **Open Latest Version**.
4. Click **Activate**.

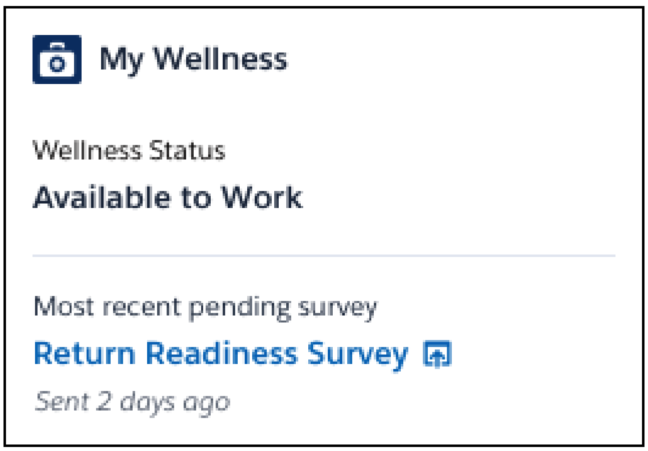
5. From the Surveys tab, click **Return Readiness** > **Open Latest Version**.
6. Click **Activate**.

Note: Before you send a survey, verify that the questions and branching logic meet your company's needs. See Wellness Check on page 47.

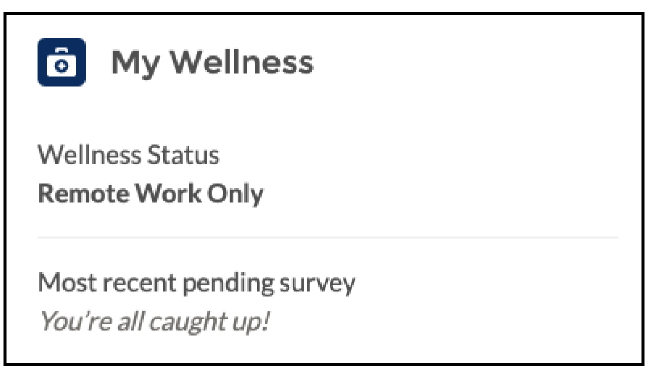
Configure the My Wellness Component

The Workplace Command Center package includes My Wellness, a custom Lightning component. When added to an Experience Cloud site, the My Wellness component helps employees verify that their own reported wellness status is up to date. It also helps employees give prompt responses to wellness surveys by providing a link to the most recent survey waiting for their response. You can add the component to any activated site in orgs where the version 5 Workplace Command Center package is installed.

The wellness status shown to the employee is the current value in the Wellness Status field in their employee record. If the employee hasn't responded to a wellness survey invitation recently, their wellness status can be out of date. If that's the case, the employee can click the provided link to access the most recent invitation of a pending wellness survey.



If the survey was sent or scheduled with an authentication requirement, the employee must authenticate after clicking the link to access the survey. After the employee responds to the most recent pending survey, the link is replaced by a link to the next most recent pending survey, if any. Otherwise, the component indicates that the employee is all caught up on their wellness surveys.



Note: When the My Wellness component is configured correctly, employees can use it to see their own wellness status but not the wellness status of other employees. Even so, we don't recommend deploying the My Wellness component to public pages.

Add the My Wellness Component to an Experience Cloud Site

You can add the My Wellness custom Lightning component to any activated site in orgs where the version 5 Workplace Command Center package is installed.

SEE ALSO:

Custom Lightning Page Components

Add Members to Your Experience Cloud Site

Add the My Wellness Component to an Experience Cloud Site

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

You can add the My Wellness custom Lightning component to any activated site in orgs where the version 5 Workplace Command Center package is installed.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

Note: This procedure assumes that your sharing rules give all employees who use the My Wellness component read access to their own employee record. For details, see Set Sharing Rules for Workplace Personas.

1. To enable access to the **wkcc.b2w_EmployeeWellnessStatusController** Apex class, edit the profiles or permission sets or both used by employees who use the My Wellness component.
2. From Setup, search for and select `All Sites`.
3. Next to the site where you want to add the My Wellness component, click **Workspaces**.
4. From My Workspaces, click the **Administration** tile.
5. Under Members, select the profiles or permission sets, or both, used by employees who are My Wellness component users.
6. Under Emails, select **Send welcome email**.

   The welcome email gives new site members an opportunity to create a password.
7. Return to the All Sites page. Next to the site where you want to add the My Wellness component, click **Builder**.
8. Click the **Components** lightning bolt icon on the left navigation. Under Custom Components, select **My Wellness Status**, and drag it to the builder canvas.
9. Click **Preview** on the toolbar, and verify how the site looks on different devices and to authenticated and guest users with the My Wellness component added.
10. To make your site updates available to all members, click **Publish**.

SEE ALSO:

Custom Lightning Page Components

Add Members to Your Experience Cloud Site

Customize Sites with Experience Builder

Create and Import Data

To create data, get to know the Work.com data model.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Tip: Work.com data stores sensitive information about employees. This document explains how to import and create the data. Before you export the data, Salesforce recommends that you review all data export requests with your own counsel.

Understand the Work.com Data Model

The Work.com data model uses a mix of standard Salesforce objects, custom Salesforce objects, and metadata types to store information about your company's facilities and employees.

Populate the Location Hierarchy and Recalculate Wellness Fact Records

Automatically run batch jobs to populate the location hierarchy and recalculate the aggregated wellness value for everyone at each location.

Create and Import Location and Address Records

Locations can be physical places like buildings, warehouses, floors, or spaces where employees work. Locations can also be an abstraction that represents an aggregation of sublocations with a shared characteristic, such as a sales region or a city neighborhood.

Create and Import Employee Records

The Employee object is a Work.com standard object.

Create, Import, or Link User Records

Employees who need access to the Work.com org should have an associated user record. And, add users to the proper permission set group to use Workplace Command Center.

Automatically Sync Employee and User Records

Employee-User Sync features help organizations configure how to associate Employee records with User records and cascade updates from Employee records to User records.

Understand and Disable Workplace Command Center Triggers

Workplace Command Center includes several triggers to synchronize data, and a custom setting that allows you to disable and enable the triggers.

Convert Legacy Employee Data to Use Full Name

Admins may need to run a script that ensures existing employee names in an org properly populate the Full Name field to enable searching for existing employees on either first, middle, or last name. This script only applies to legacy records in the org before the Winter '21 (API version 50.0) release. Employee records created after that release automatically populate the Full Name field properly.

Understand the Work.com Data Model

The Work.com data model uses a mix of standard Salesforce objects, custom Salesforce objects, and metadata types to store information about your company's facilities and employees.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Work.com uses these standard objects:

AuthorizationForm, AuthorizationFormConsent, AuthorizationFormText

Captures employee's consent for collecting and storing health information.

Crisis

Represents a crisis event, such as the COVID-19 pandemic.

Employee

Stores information about each employee in an organization.

EmployeeCrisisAssessment
Stores information related to a crisis, such as the results of wellness surveys that assess workplace readiness related to COVID-19.

Individual
Connects Employee data with privacy and consent information.

InternalOrganizationUnit
An organization that an employee belongs to.

Location
Stores information about facilities. Uses **Address** to relate a visitor address to a location.

Survey, SurveyInvitation, SurveyResponse, SurveySubject
Wellness Check health questionnaires.

You can create data in Salesforce or import it with any of your preferred data import tools.

Review the Work.com Developer Guide for more detailed information on the Work.com data model.

SEE ALSO:

Work.com Developer Guide: Understand the Work.com Data Model

Populate the Location Hierarchy and Recalculate Wellness Fact Records

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Automatically run batch jobs to populate the location hierarchy and recalculate the aggregated wellness value for everyone at each location.

1. From the App Launcher, search for and select **Command Center Settings**.
2. In the Location Data and Permissions tab, find the Configure Location Data section.
3. Click **Run**.

Run these batch jobs when you disable or reenable the Work.com location trigger (`b2w_LocationTrigger`) and to recalculate location or wellness data for any other reason.

Important: Run these batch jobs during the initial setup process if you add or import location data to your org before completing all other configuration steps.

When the batch jobs are complete, your locations are organized into the hierarchical relationships that you specified. Any new or previously unassociated wellness values are associated with the survey respondent's location.

To confirm the status of these batch jobs, go to Setup, and in the Quick Find box, enter *Apex Jobs*. In the table, confirm that the Job Type Batch Apex shows a Completed Status for the Apex Class b2w_PopulateLocationHierarchyBatch.

Jobs that you see for the b2w_LocationWellnessBatchScheduler class support aggregation efficiency for your reporting. No action on those jobs is necessary.

SEE ALSO:

Understand and Disable Workplace Command Center Triggers

Create and Import Location and Address Records

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Locations can be physical places like buildings, warehouses, floors, or spaces where employees work. Locations can also be an abstraction that represents an aggregation of sublocations with a shared characteristic, such as a sales region or a city neighborhood.

Tip: This topic provides an overview of working with location and address records. For detailed information, see the Work.com Developer Guide.

Important: When you insert Location records, limit the batch size to 4000. If there are more processes running on Location in your org, the batch size may need to be less than 4000.

Each location record has a Location Type. By default, possible values in Work.com are:

- `Building`
- `Campus`
- `Floor`
- `Plant`
- `Site`
- `Space`
- `Store`
- `Warehouse`

If you want to create location types that represent abstract groupings, such as the San Francisco Bay Area or Central Europe, set location search filtering to all levels instead of to only level 1 (the default). For details, see Locations and Filtering.

A Location record can have child Location records, which are called sublocations. Create a hierarchy that goes all the way to the employee work area and assign each employee to their work area sublocation, for example, **Building > Floor > Space.**

Important: Assign employees to the lowest level of the hierarchy. By assigning them to the lowest level, you can track the operating status of each work area and the health of employees assigned to that work area. To manage shifts, you must assign employees to the lowest level of the hierarchy.

Each Location record has a Location Level, which is assigned automatically. A top-level, root location is level 1. A sublocation of level 1 is level 2, and so on.

A location hierarchy can include up to 10,000 locations. A hierarchy includes a level 1 location and all its sublocations. A location path includes a level 1 location and supports up to 13 levels.

Tip: It's a best practice to assign a visitor address only to a physical place, like a building. Another best practice is to have only one location with a visitor address in the path from a level 1 location down to each of its lowest descendants.

Shift Management requires unique Location names no longer than 40 characters. If you're using Shift Management, observe these limits.

Work.com adds two fields to the Location standard object: `Status`, and `Status Last Updated`. Although neither of these fields is required to create a record, provide a `Status` so that you can monitor it in the Command Center. If you don't provide a `Status`, the location's map icon is gray. The Location object doesn't support Activities.

- `Status`—The functional state of a location. By default, the possible values are:
  - `Hard Close`
  - `Open`
  - `Reduced Density`
  - `Soft Close`

Provide a `Visitor Address` so you can see a status pin in the map of the Location Workplace Status component. A `Visitor Address` is a reference to a child Address record. For locations within the US, use the two letter State code in the address field to ensure compatibility with other Work.com apps.

Important: To create an Address record via the UI, create a Location record and save it *without* a value for *`Visitor Address`*. Then open the record and create an address from the Addresses related list. After you create level 1 locations, create sublocations. On a child record, set the Parent Location to the immediate parent.

SEE ALSO:

Enable Location Search Filtering at All Levels (Optional)

Create and Import Employee Records

The Employee object is a Work.com standard object.

Tip: This topic provides an overview of working with employee records. For detailed information, see Work.com Developer Guide.

Create Employee records that, in addition to the required fields, have values for these fields:

- `Location`: The employee's workplace. To monitor your facilities by sublocations, assign each employee to a sublocation.
- `CurrentWellnessStatus`: The employee's wellness status. This value is displayed in the Command Center. By default, the possible values are:
  - `Available to Work`
  - `Remote Work Only`
  - `Unavailable`
  - `Unknown`—We recommend using this as the default value.

Employee records are related to Individual records. If an employee is created without relating it to an individual, a new individual is created automatically. After inserting an employee, by default the individual isn't kept in sync with employee updates.

To keep employee records synchronized with their individual records, set the custom setting value `Settings.EmployeeIndividualSyncDisabled` to `false`. Afterwards, changes to an employee's mapped fields are pushed to the related individual. The mapped fields are:

Employee Fields	Individual Fields
OwnerId	OwnerId
FirstName	FirstName
LastName	LastName
DateOfBirth	Birthdate
JobProfile	Occupation

When an employee responds to a survey, an Employee Crisis Assessment record is created. The `CurrentWellnessStatus` is updated based on that record. See How Do Survey Responses Map to the Data Model? on page 49.

To enable encryption for employee fields, see What Standard Fields Can I Encrypt?

Create, Import, or Link User Records

Employees who need access to the Work.com org should have an associated user record. And, add users to the proper permission set group to use Workplace Command Center.

The Employee object has a lookup field to the User object. Choose an existing user account for the User field for each Employee record to link the records. We introduced the User field on August 5, 2020. If your org was in use before that date, add the User field to your Employee page layout to see it.

Add users who will use Workplace Command Center to the Workplace Operations group or the Workplace Executive group.

SEE ALSO:

Understand and Disable Workplace Command Center Triggers

Add Workplace Operations and Executive Users

Automatically Sync Employee and User Records

Employee-User Sync features help organizations configure how to associate Employee records with User records and cascade updates from Employee records to User records.

The Employee-User Relationship in Work.com

Employees who need access to Work.com apps must have an associated user record to log in to Salesforce. The Employee object uses a User lookup field to associate the two. If a user doesn't exist for the employee, a new user must be created for them. Employee-User Sync automatically provisions user records for Employees and provides a way to keep employee and user data in sync.

The Employee-User Relationship in Work.com

Employees who need access to Work.com apps must have an associated user record to log in to Salesforce. The Employee object uses a User lookup field to associate the two. If a user doesn't exist for the employee, a new user must be created for them. Employee-User Sync automatically provisions user records for Employees and provides a way to keep employee and user data in sync.

Using Employee-User Sync, an admin sets up default values for the profile, permission sets, email encoding, and more, for new user records. When Employee-User Sync associates an employee to a user, first it tries to match the employee to an existing user to avoid duplicate users. If no matching user is found, it creates a user with these default field values. An admin can also configure whether changes to certain employee fields cascade to the corresponding user fields; and whether a user is automatically created every time a new employee record is added to an org.

Important: Employees for whom a new user is created by an HR admin don't receive an email notification to reset their password. A system admin must reset the passwords. The employees then receive links to log in and set their passwords.

Employee-User Sync for Orgs Without Existing Employee Data

When you provision your employee data using tools such as Data Loader, the automatic user-creation feature creates or links corresponding users for you.

Employee-User Sync for Orgs with Existing Employee Data

If your org already contains Employee records, create or link an existing User record to an employee in the Employees list view or Employee detail page.

Cascade Employee Updates to Users

Your business rules determine whether you want to keep Employee records and User records in sync when an Employee record is updated.

Provision Users for Large Amounts of Employee Data

The automated user provisioning process first attempts to find and link matching user records that exist for employees. If there are no matching user records, the process creates and links a new user record. To create users for orgs with a large number of employees, we recommend that you bulk-upload employee data first, and then run the user provisioning process.

Employee User Sync Considerations

Consider these recommendations when you plan on creating users for the employees records in your org.

Employee-User Sync for Orgs Without Existing Employee Data

When you provision your employee data using tools such as Data Loader, the automatic user-creation feature creates or links corresponding users for you.

Configure Default User Field Values

Before you start uploading new employee data, set default values for the required user fields. If the required user fields aren't set, the automatic user creation feature can't create users. You can also specify optional fields to make it easier to populate common fields without extra manual steps.

1. From Setup, in the Quick Find box, enter `Employee-User Settings`, and then select **Employee User Settings**.
2. Set the default values for these fields:
   - For the **Profile** field, select the default profile you want to assign to users. A profile defines a group of settings and permissions for the user.
   - For the **Email Encoding** field, select the email encoding, such as ISO-8859-1 or UTF-8, from the dropdown list.
   - For the **Domain Name** field, enter a domain name. We create a unique login by combining this domain name with each employee's username.
   - For the **Permission Set** field, select the default permission set or permission set group to assign to the new user.

Important: Make sure user licenses match across your selection of default values for profile and permission set. If your values don't match (such as Salesforce license for profile, and Salesforce Platform license for permission set), we can't create users.

Configure Automatic User Creation and Data Synchronization

You can opt in to automatically create or link user records when new Employee records are inserted. You can also choose to update user records when certain fields in an Employee record are updated so that employee and user data remains in sync.

- (optional) Turn on **Automatic User Creation** if you want to automatically create or link a user to a new employee record.
- (optional) Turn on **Cascade Employee Changes** if you want updates to certain fields in an employee record to carry over to the corresponding user record. See Cascade Employee Updates to Users on page 37 for a list of updated fields.

Click **Save**

Use User Provisioning to Create or Link User Records to Employee Records in Bulk

Create or link user records with employee records with User Provisioning. User Provisioning is helpful for dealing with many employee records. The user provisioning process can take some time depending on the number of unprovisioned employee records in your org. You're free to move on to other tasks while waiting for the process to finish. To run the user provisioning process:

1. From Setup, in the Quick Find box, enter `Employee-User Settings`, and then select **Employee User Settings**.
2. Set the default values for these fields:

a. For the **Profile** field, select the default profile you want to assign to users. A profile defines a group of settings and permissions for the user.

b. For the **Email Encoding** field, select the email encoding, such as ISO-8859-1 or UTF-8, from the dropdown list.

3. In the User Provisioning section, click **Run User Provisioning**.
4. Click **Run** in the confirmation window.

Starting the user provisioning process creates a user provisioning process record that allows you to check the status of the process. To check the status of the provisioning process, click View Processes. From there, you can see the process's progress and view any finished processes. When viewing a process, you can see how many employee records were successfully provisioned, and if there were any errors. Errors contain links that lead you directly to the affected employee record.

Import Employee Data via Data Loader or Mulesoft Connector

See Create and Import Employee Records to add employee records. You can also import employee records via Mulesoft Data Loader. If you choose to turn on **Automatic User Creation**, new User records are created for imported employee records. See information about batch size limitations in Employee User Sync Considerations on page 38 before setting up the import process.

Employee-User Sync for Orgs with Existing Employee Data

If your org already contains Employee records, create or link an existing User record to an employee in the Employees list view or Employee detail page.

Tip: If you don't want this feature to be available in your org, remove the Create User button from both the list view and Employee detail page by editing the page layouts.

Configure Default User Field Values

Before you start creating users or linking to existing employees, set up default values of the required user fields. You can also specify optional fields to make it easier to populate common fields without extra manual steps:

1. From Setup, in the Quick Find box, enter `Employee-User Settings`, and then select **Employee User Settings**.
2. Set the default values for these fields:
   - For the **Profile** field, select the default profile you want to assign to users. A profile defines a group of settings and permissions for the user.
   - For the **Email Encoding** field, select the email encoding, such as ISO-8859-1 or UTF-8 from the dropdown list.
   - For the **Domain Name** field, enter a domain name. We create a unique login by combining this domain name with each employee's username.
   - For the **Permission Set** field, select the default permission set or permission set group to assign to the new user.

Important: Make sure user licenses match across your selection of default values for profile and permission set. An invalid combination of choices (such as Salesforce license for profile, and Salesforce Platform license for permission set) causes user creation to fail.

Configure Automatic User Creation and Data Synchronization

You can opt in to automatically create or link user records when new Employee records are inserted. You can also choose to update user records when certain fields in Employee are updated so that Employee and User data remains in sync.

- (optional) Turn on **Automatic User Creation** if you want to automatically create or link a user to a new Employee record.

- (optional) Turn on Cascade Employee Changes if you want updates made to certain fields in an Employee record to cascade to their corresponding user. See Cascade Employee Updates to Users on page 37 for list of updated fields.

Save your changes.

Note: While you don't have to worry about automatic user creation if you aren't adding new Employees records, turn this toggle on to avoid linking or creating users via manual quick action when new Employee records are added in the future.

Use the Create User Quick Action to Create or Link User Records

Create users for existing employees or link to related existing users with a quick action. This operation can be performed on the Employee list view or Employee detail page using the **Create User** button. The sync operation creates a user for employees with no user:

1. In **Workplace Command Center**, click the **Employee** tab in the navigation bar to access the Employee list view (if you don't see the **Employee** tab, go to **App Launcher** and search for "Employees" and add it to your navigation bar).
2. Either select all the records in bulk or only select some records.
3. Click **Create User**.
4. The sync operation compares the Employee Number and Email Address values in Employee and User records to match an employee to a user. If no match is found, the operation creates a user.
5. A success message indicates that users have been created (or linked) for all or some selected Employees.
6. Review any error messages to resolve any issues. Click **Create User** for any remaining Employee records to finish creating user records for all employees.

Alternatively, open a single Employee record and click the **Create User** button on the Employee detail page to create or link a user to that employee. If the sync is successful, the User field on the Employee record is assigned the username. If not, fix the displayed error and try to sync again.

Cascade Employee Updates to Users

Your business rules determine whether you want to keep Employee records and User records in sync when an Employee record is updated.

If you choose to turn on the Cascade Employee Changes setting, updates made to the following fields in an Employee record cascade to their corresponding user fields:

- First Name
- Middle Name
- Last Name
- Email address
- Employee Number

Provision Users for Large Amounts of Employee Data

The automated user provisioning process first attempts to find and link matching user records that exist for employees. If there are no matching user records, the process creates and links a new user record. To create users for orgs with a large number of employees, we recommend that you bulk-upload employee data first, and then run the user provisioning process.

For orgs with a large number of employees, selecting employees to sync using the employee list view isn't efficient, because in list view actions, you can't select more than 200 items at a time. Also, due to batch-size limitations, you can import only 2,000 records per transaction with Automatic User Creation enabled. For these orgs, run the user provisioning process instead of relying on automatic user creation or manually linking user records in the employee list view.

Use User Provisioning to Create or Link User Records to Employee Records in Bulk

Create or link user records with employee records with User Provisioning. User Provisioning is helpful for dealing with many employee records. The user provisioning process can take some time depending on the number of unprovisioned employee records in your org. You're free to move on to other tasks while waiting for the process to finish. To run the user provisioning process:

1. From Setup, in the Quick Find box, enter `Employee-User Settings`, and then select **Employee User Settings**.
2. Set the default values for these fields:
   a. For the **Profile** field, select the default profile you want to assign to users. A profile defines a group of settings and permissions for the user.
   b. For the **Email Encoding** field, select the email encoding, such as ISO-8859-1 or UTF-8, from the dropdown list.
3. In the User Provisioning section, click **Run User Provisioning**.
4. Click **Run** in the confirmation window.

Starting the user provisioning process creates a user provisioning process record that allows you to check the status of the process. To check the status of the provisioning process, click View Processes. From there, you can see the process's progress and view any finished processes. When viewing a process, you can see how many employee records were successfully provisioned, and if there were any errors. Errors contain links that lead you directly to the affected employee record.

Employee User Sync Considerations

Consider these recommendations when you plan on creating users for the employees records in your org.

Batch Size Limitation

Due to batch-size limitations, you can import only 2,000 records per transaction with Automatic User Creation enabled. For these orgs, run the user provisioning process instead of relying on automatic user creation or manually linking user records in the employee list view.

List View Selection Limitations

Salesforce allows you to select only 200 list view items at a time.

Matching Employees to Existing Users

When associating new or existing employee to a user, the sync operation always tries to match the employee to an existing user to avoid duplicate users. Matching is done either on an identical email address or employee ID in both employee records and user records. If more than one match is found, the sync operation chooses the user in this order of matching:

1. Employee Number + Email
2. Employee Number
3. Email

No Data Cascading at the Time of Linking

Data cascading doesn't occur at the initial linking of an employee record to a user record, even if the Cascade Employee Changes setting is enabled. Data synchronization from employee to user record applies only to changes made after linking, and only when the changes are made to one of these fields:

- First Name

- Middle Name
- Last Name
- Email Address
- Employee Number

Escalated User Access

There are cases when the Employee-User Sync feature allows a user without access to the User object to indirectly create a user record. For example, if the Automatic Create User setting is enabled, an admin can create an employee record, which in turn creates a user record. Consider these consequences when configuring the Automatic Create User setting. The workaround for this situation is to keep this feature disabled. While disabled, only an admin with access to the User object can create user records and links them to employee records.

Understand and Disable Workplace Command Center Triggers

Workplace Command Center includes several triggers to synchronize data, and a custom setting that allows you to disable and enable the triggers.

The triggers provided with Workplace Command Center are:

b2w_EmployeeCrisisAssessmentTrigger

- Calculates `Employee.CurrentWellnessStatus` on an insert, update, and delete based on assessment values and mappings.
- `Employee.CurrentWellnessStatus` is set based on the most recent value of `EmployeeCrisisAssessment.Assessment`.

> Note: The `b2w_EmployeeCrisisAssessmentTrigger` has a batch limit of 6000. When there are more than 3000 employee records, the batch size limit is 3000. The limit may be lower depending on other triggers that aren't from the Workplace Command Center package.

b2w_EmployeeTrigger

- Creates the Individual record if not provided
- Synchronizes key fields from Employee to Individual
- Stages the pre-aggregate recalculation for Location.

> Note: If the custom setting **Employee Individual Sync Disabled** is `false` and you assign an existing Individual to an Employee, the overlapping fields on Individual are overwritten by those on Employee. The four overlapping fields on Individual are First Name, Last Name, Birthdate, and Occupation.

b2w_LocationTrigger

- Establishes `Location.Level2LocationId__c` and `Location.LocationPath__c` fields and keeps them updated when location hierarchy changes.
- Stages the pre-aggregate recalculation for Location when location hierarchy changes.

> Note: Populate the location hierarchy and recalculate wellness data anytime you disable or re-enable `b2w_LocationTrigger`. Run these batch jobs from the Command Center Settings tab on page 31.

b2w_UserTrigger

- Runs on insert and update. If a user record doesn't already have an `IndividualId` set, and it does have an `EmployeeNumber`, then the Employee is queried for employees matching that `EmployeeNumber`. If a unique match is found, the User is linked to the same Individual as the matching Employee.

Workplace Command Center includes a **Trigger Settings** custom setting that allows you to declaratively enable or disable the execution of the Apex triggers. This is useful if the trigger needs to be disabled during large data loads, or if you want to turn off a trigger temporarily.

To disable a trigger, update the custom Trigger Settings.

1. From Setup, enter *Custom*, and select **Custom Settings**.
2. Click **Trigger Settings**.
3. Click **Manage** to display rules for the custom setting.
4. Open the record for the trigger domain you want to change and edit the record to set the disabled fields.
5. Click **Save**.

SEE ALSO:

Modify Survey Process Settings

Convert Legacy Employee Data to Use Full Name

Admins may need to run a script that ensures existing employee names in an org properly populate the Full Name field to enable searching for existing employees on either first, middle, or last name. This script only applies to legacy records in the org before the Winter '21 (API version 50.0) release. Employee records created after that release automatically populate the Full Name field properly.

Note: In the Winter '21 (API version 50.0) release, we introduced an Employee Full Name field. It uses the existing `Employee.Name` field in the API. To utilize this field and its new behavior in search, orgs already in use before the Winter '21 release need to update their Employee records using an Apex script. For more information, see the Work.com release note from Sept 18, 2020.

The following Apex script touches existing Employee records to update the Name field value to Full Name. To run the script:

1. In the Developer Console, go to **File** > **New** > **Apex Class**.
2. In the text box, enter **EmployeeNameJob** and click **OK**.
3. Enter the following code for class definition:

```
global class EmployeeNameJob implements Database.Batchable<sObject> {

    global Database.QueryLocator start (Database.BatchableContext bc) {

        DateTime last6Hours = System.now().addHours(-6);

        return Database.getQueryLocator(
            'SELECT Id, Name, FirstName, LastName ' +
            'FROM Employee ' +
            'WHERE LastModifiedDate < :last6Hours ' +
            'AND Name LIKE \'EE-%\'');
    }

    global void execute (Database.BatchableContext bc, List<Employee> scope) {

        List<Employee> employees = new List<Employee>();

        for ( Employee e : scope ) {
            if ( !e.Name.contains(e.FirstName) ) {
                employees.add(e);
            }
```

```
        }

        try {
            update employees;
        } catch (Exception e) {
            System.debug(e.getMessage());
        }
    }

    global void finish (Database.BatchableContext bc) {

        System.debug('Employee Name update Job ID: ' + bc.getJobId());

    }
}
```

4. Save the batch Apex code. **File** > **Save.**
5. From the Developer Console, go to **Debug** > **Open Execute Anonymous Window** and run the following: `EmployeeNameJob batchJob = new EmployeeNameJob();Id jobId = Database.executeBatch(batchJob);`
6. You can monitor the status of the job from **Setup** > **Apex Jobs**.

Alternately, if you want to touch only selected records, you can run this shorter script to update a specific number of Employee records:

1. From the Developer Console, go to **Debug** > **Open Execute Anonymous Window**.
2. Paste the following code, where `LAST_MODIFIED_HOURS` is the number of hours you want to look back on based on the last update timestamp on an Employee record and `MAX_UPDATE_COUNT` is the number of records you want to touch.
3. To check status, check the **Open Log** checkbox and run the following:

```
static final Integer LAST_MODIFIED_HOURS = 2;
static final Integer MAX_UPDATE_COUNT = 10000;

DateTime lastModHours = System.now().addHours(-LAST_MODIFIED_HOURS);

List<Employee> employeesToUpdate = [SELECT Id, Name, FirstName, LastName
                                   FROM Employee
                                   WHERE LastModifiedDate < :lastModHours
                                   AND Name LIKE 'EE-%'
                                   LIMIT :MAX_UPDATE_COUNT];

try {
   update employeesToUpdate;
} catch (Exception e) {
   System.debug(e.getMessage());
}
```

View Log Messages from Workplace Command Center and Wellness Check

When logging is enabled, Workplace Command Center and Wellness Check add errors and exceptions as log messages to the Command Center Logs custom object.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

1. Configure Logging
   Use the Command Center Log Settings custom metadata type to enable or disable logging. You can also configure whether to keep all log messages or just a maximum.
2. View Log Messages
   To view log messages, create a list view on the Command Center Logs object.

Configure Logging

USER PERMISSIONS

To modify custom metadata type records:
- Customize Application

Use the Command Center Log Settings custom metadata type to enable or disable logging. You can also configure whether to keep all log messages or just a maximum.

1. From Setup, enter `Custom Metadata` in the Quick Find box, then select **Custom Metadata Types**.
2. Click **Manage Records** next to Command Center Log Settings.
3. Click **Default**, and then **Edit**.
4. To start receiving log messages, check **Enable Logging**. Logging is enabled by default.
5. To keep only a maximum number of log messages, check **Delete History**, and enter the maximum number in **Maximum History Rows**. If the **Delete History** field is unchecked, then Salesforce never deletes log messages.
6. Click **Save**.

View Log Messages

USER PERMISSIONS

To create list views:
- Read on the type of record included in the list AND Create and Customize List Views

To create, edit, or delete public list views:
- Manage Public List Views

To view log messages, create a list view on the Command Center Logs object.

1. From the App Launcher, enter `Command Center`, and click **Command Center Logs**.
2. Under List View Controls, select **New**.
3. Enter a name and API name for the list view and who can see the list.
4. Click **Save**. The Filters panel appears.
5. Click **Filter by Owner**, then select **All command center logs**.
6. Click **Done**.
7. Add and set filters to view only the records that meet your criteria. You have different options depending on the field you want to filter and the operator you choose.
8. Click **Save**.

Update an Existing Workplace Org

Workplace Command Center is a managed package. New versions of the package are pushed to orgs automatically, but sometimes include features that need further configuration.

When we release a new version of the Workplace Command Center package, all orgs with previous versions are automatically upgraded to the new package. Most new features and changes are pushed to existing orgs, but sometimes admins must adjust the org's configuration to keep the org up to date.

The Wellness Check unmanaged package, installed during the initial setup and configuration process, does not require updates. Changes to any feature installed into a Work.com org via the Wellness Check package are delivered via the Workplace Command Center package.

We announce updates to the Workplace Command Center package in the Work.com Release Notes. Keep an eye out for updates and changes there. If you have questions, post them to the Trailblazer Community group.

1. Upgrade to Workplace Command Center Package Version 3

   Work.com orgs that upgrade to version 3 of the Workplace Command Center managed package from earlier versions must add and assign new permissions.
2. Update Permissions from Command Center Settings

   Check if the Workplace Command Center permissions are current, and update them with the click of a button.
3. Add Custom Fields to the Tasks Layout

   To support Salesforce Flows embedded in tasks, add custom fields included in the Workplace Command Center package on the task object page layout.
4. Add the Survey Schedule History Related List to Survey Schedules

   You can use the Survey Schedule History to verify when surveys were sent, whether they were sent successfully, and who owns the schedule.

Upgrade to Workplace Command Center Package Version 3

Work.com orgs that upgrade to version 3 of the Workplace Command Center managed package from earlier versions must add and assign new permissions.

With the release of the Workplace Command Center package version 3, we introduced a setting that detects if org permissions match the most recent package configuration. This allows all orgs using our recommended permissions to add updates to their org with a click of a button when a new package is released.

Work.com orgs upgraded to the Workplace Command Center managed package version 3 from earlier versions must add the current permissions and permission set groups to their orgs, then assign users to those permission set groups with the following steps.

1. Update Permissions from Command Center Settings on page 44 to add the new permissions to your org.
2. Assign Workplace Admins, Workplace Operations Managers, and Workplace Executives users to the new permission set groups.
3. Confirm the Set Sharing Rules for Workplace Personas on page 12 as needed.

Orgs existing before version 3 that don't add the current permissions won't get future package permission updates.

SEE ALSO:

Work.com Release Notes

Add Workplace Operations and Executive Users

Add Workplace Admins

Update Permissions from Command Center Settings

Check if the Workplace Command Center permissions are current, and update them with the click of a button.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

USER PERMISSIONS

To update permissions:

- Manage Profiles and Permission Sets

> **Important:** Work.com orgs that upgrade to version 3 of the Workplace Command Center managed package from earlier versions must add the current permissions and permission set groups to their orgs using the Update Permissions setting, then assign users to those permission set groups. Existing orgs with earlier versions that don't update their permissions won't get future package permission updates.

If you're using the Workplace Command Center recommended permissions, keep them up to date with the most recent version of the Workplace Command Center managed package.

1. From the App Launcher, search for and select **Command Center Settings**.
2. In the Location Data and Permissions tab, find the Update Permissions section.
3. Click **Update Permissions**.

Workplace Command Center checks your org's permissions to see if they are in sync with our most recent package. If not, the Update Permissions section of Command Center Settings displays an active **Update** button. Click the button to align your permissions with our current recommendations. The button is disabled if your org is up to date.

Update your permissions when:

- A new version of the Workplace Command Center package is released and includes a change in permissions.
- Our permission sets or permission set groups were edited in your org and you want to overwrite the customizations and return to our recommended configuration.
- The recommended permission sets and permission set groups don't exist in your org and you want to add them.

The **Update** button modifies the recommended permission sets that are set up in your org during the Workplace Command Center package installation and auto-configuration process. This button doesn't remove or change user assignments associated with the permission sets or groups.

> **Important:** This setting overwrites any customizations made to the recommended permission sets in your org. Review information on the recommended Workplace permissions before customizing or updating your permissions.

Watch for permission updates in the Work.com Release Notes.

SEE ALSO:

Review Recommended Workplace Permissions

Add Custom Fields to the Tasks Layout

To support Salesforce Flows embedded in tasks, add custom fields included in the Workplace Command Center package on the task object page layout.

Work.com orgs set up after the v2 release of the Workplace Command Center managed package have custom fields on the task page layout by default. Check your existing configuration before adding these fields to the layout.

1. From the Object Manager, click **Tasks**.
2. Click **Page Layouts**.
3. Click **b2w Task Layout**.
4. Click **Fields**.

5. Find the Action Type field. Drag it to the Operations Task section.
6. Find the Action API Name field. Drag it to the Operations Task section.
7. Click **Save**.

Add the Survey Schedule History Related List to Survey Schedules

You can use the Survey Schedule History to verify when surveys were sent, whether they were sent successfully, and who owns the schedule.

1. From the Object Manager, click **Survey Schedule**.
2. Click **Page Layouts**.
3. Click **Survey Schedule Layout**.
4. In the Survey Schedule Layout box, click **Related Lists**.
5. Find the Survey Schedule History related list. Drag it to the Related Lists section.
6. Click **Save**.

Workplace Command Center Limitations and Allocations

A crisis recovery solution as flexible as Workplace Command Center doesn't come without some limitations. Consider the impact on your users and your overall business solution as you design your return-to-work strategy.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Command Center Limitations

The Command Center is a high-level dashboard. A Salesforce admin can choose which components to display and how they're configured.

Location Filter

By default, the location filter supports searching on level 1 locations only. A level 1 location is a top-level root location (that is, a location that isn't a child of any other location). If the org uses default location filtering, a level 1 location must have a visitor address.

A Salesforce admin can enable search on *any* location, including locations that don't have a visitor address, such as a neighborhood or a geographical region, or locations that are children of other locations. When location search filtering for all levels is enabled, a level 1 location doesn't have to have a visitor address; it can be an abstraction.

Location Hierarchy

At each sublocation level, the location hierarchy component displays a maximum of 1,000 records.

Wellness Check Limitations and Allocations

Wellness Check is built on Salesforce Surveys, but be aware of some limitations of this custom implementation.

- We don't recommend sending more than 10,000 emails at once. If you have other queueable Apex jobs running, the limit can be lower.
- Surveys sent to an employee list view are allocated up to 9,999 emails. To work around this allocation, send emails from a location list view. You can send to a location that includes more than 9,999 employees. You can also create filtered employee list views to send emails in smaller batches.

- Each Salesforce org receives up to 300 survey responses for free. After the first 300, you can purchase an add-on response pack. Contact your Account Executive or Salesforce Support for more information.
- Survey email templates don't allow Employee merge fields.
- By default, surveys are sent from the logged-in user. Alternatively, you can set one organization-wide email address as the global reply-to address for survey invitation emails.
- The send survey UI doesn't check for permissions on load. A user can configure the send survey screen, click **Send**, and get a success message even if the user doesn't have the proper permissions to send surveys.
- To send surveys to all sublocations, you must send the survey from a level 1 location.
- If the send survey UI is used to send surveys, and no error is encountered when starting the send process, the user sees a success toast notification. However, if an error occurs during the queue-able operation, a survey might not be sent to all employees and the user doesn't see an error message.
- There's no logging to indicate that a survey was sent successfully.
- Sending surveys counts against email allocations and survey allocations. To see if these limits can be extended, contact Salesforce Customer Support.

Data Limitations and Allocations

Workplace Command Center uses standard and custom objects to allow you to model your facilities and employees. It uses Apex triggers to synchronize data.

Location

When you insert Location records, limit the batch size to 4000. If there are more processes running on Location in your org, it may need to be less than 4000.

Location Address

By default, a level 1 location must be a physical place (`VisitorAddress`). If location search filtering for all levels has been enabled in the org, a level 1 location doesn't have to have a visitor address; it can be an abstraction.

Location Name

Shift Management requires unique location names (`LocationName`) no longer than 40 characters. If you're using Shift Management, observe these Location limits.

Location Path

A location path (`LocationPath__c`) can include up to 10,000 locations. A path includes a level 1 location and all its child locations and supports up to 13 levels.

b2w_EmployeeCrisisAssessmentTrigger

The `b2w_EmployeeCrisisAssessmentTrigger` has a batch limit of 6000. When there are more than 3000 employee records, the batch size limit is 3000. The limit may be lower depending on other triggers that aren't from the Workplace Command Center package.

Logging

Logging for batch processing isn't yet available.

SEE ALSO:

Salesforce Surveys and Feedback Management

Daily Allocations for Email Alerts

Gather Data with Wellness Check

All Systems Go! Use Workplace Command Center

Enable Location Search Filtering at All Levels (Optional)

Gather Data with Wellness Check

Use Wellness Check to send wellness surveys to employees. Wellness surveys assess employees' readiness to return to the workplace. Survey responses update the employee data model. This data is captured in the Employee Crisis Assessment, Employee, and Authorization Form Consent records, and visualized through aggregated charts in the Command Center.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Wellness Check

Wellness Check provides two surveys and email templates that you can use as-is, or modify to meet the needs of your organization.

Survey Design Considerations

You can use the wellness surveys out of the box. You can also modify them as much as you like to match your company's needs. If you choose to modify the surveys, consider these guidelines.

How Do Survey Responses Map to the Data Model?

Wellness Check survey responses map to the data model to track consent, wellness status, and workplace availability. If you configure surveys, it's important to understand how these mappings work.

Modify Wellness Surveys

To change a survey, create a copy or create a new version.

Modify or Create Email Templates

Wellness Check includes an email template for each survey: Return Readiness Wellness Survey and Continuing Wellness Survey. Use these templates or create your own.

Distribute Surveys

You can distribute surveys to one or more individuals, to all individuals at one or more locations, or to individuals who share a particular role at the selected locations. You can schedule when a survey goes out and how often. You can also deactivate a schedule when you want to use a different schedule or no schedule temporarily.

Respond to Surveys

Each email invitation contains a survey link that is unique to the employee. Employees don't have to authenticate to follow the link to the survey unless you specify that authentication is required when sending or scheduling the survey.

Analyze Responses and Take Action

When the Wellness Survey is completed, the survey response updates the employee data model. This data is captured in the Employee Crisis Assessment and Employee data records, and then visualized through aggregated charts in the Command Center.

Modify Survey Process Settings

Edit processing time, batch size, and other settings to optimize Work.com survey processing in your org.

SEE ALSO:

Workplace Command Center

Wellness Check

Wellness Check provides two surveys and email templates that you can use as-is, or modify to meet the needs of your organization.

The surveys were designed using public guidance available from the US Centers for Disease Control and Prevention.

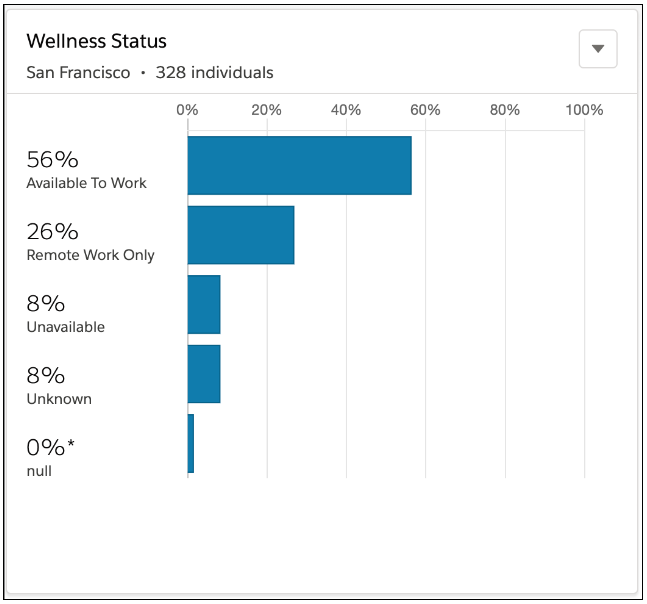
- Return Readiness
- Continuing Wellness

The questions are the same in both surveys, but the introductory text is different. Send the Return Readiness survey first. The introduction explains that the survey is designed to assess an employee's health so that they can return to their workplace safely.

Send the Continuing Wellness survey periodically, at whatever interval you decide. It asks the employee to update their health status.

When an employee submits a wellness survey, the survey response is processed and the employee data model updates. For example, if an employee responds that they decline to provide health data, their wellness status is set to Remote Work Only. You can configure how the survey response data maps to the data model.

Wellness status data is visible in the wellness components in the Command Center. For example, the Wellness Status component displays the percentage of individuals with each wellness status.



Note: Before you send a survey, we recommend verifying that the questions and branching logic meet your company's needs.

Survey Design Considerations

You can use the wellness surveys out of the box. You can also modify them as much as you like to match your company's needs. If you choose to modify the surveys, consider these guidelines.

These surveys address health, which is a sensitive topic for most people, especially during the COVID-19 pandemic. Also, many people are concerned about the privacy of their health data. To start the journey back to our workplaces, trust is important.

- We recommend that the first page is a clear, kind, and honest introduction that asks for consent.

  Consider what you, as an individual, want to know when asked to submit health data. What type of data does the survey collect? How is it stored? Who has access to it? What decisions are made based on the data?

  The first page should give the employee a chance to decline and tell them the ramifications of that decision.

- Survey questions should collect as little information as is necessary to make appropriate decisions.

  For example, the presence of one symptom means that an employee isn't safe to return to their workplace. To request information about symptoms, list them and ask the yes or no question, "Do you have any of these symptoms?" Requiring a yes or no for each symptom takes more time to answer, may be more invasive, and isn't necessary.

- If asking about age, use ranges that are as broad as possible but still allow you to collect the information you need to make a decision.
- Design the survey with page branching logic that provides a decision page telling the employee whether they can return to the workplace.
- Whatever the answer, we recommend following up with an email to confirm and provide more information.

  Remember, even if an employee is cleared to return to their workplace, they may have complicated feelings about the change. Some people are ready to get back to the workplace and look forward to more socializing and in-person collaboration. Others are concerned about safety or feel more productive at home.

  Provide as much information as you can about conditions in the workplace. If employees have options, such as transitioning slowly, let them know. To share space with each other again, trust is key.

- If your organization has a legal department, we recommend that you collaborate with them on the survey questions and branching logic.

SEE ALSO:

Ethical and Humane Use

How Do Survey Responses Map to the Data Model?

Wellness Check survey responses map to the data model to track consent, wellness status, and workplace availability. If you configure surveys, it's important to understand how these mappings work.

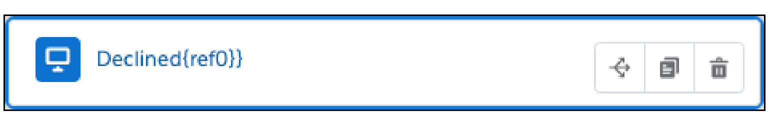
If you make any of these customizations, verify the mappings between the survey and the data model in Command Center Settings on page 24.

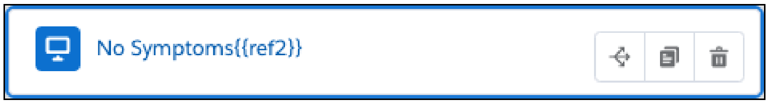
- Add or delete survey questions
- Change page branching logic
- Add or remove a survey result reference, like {{newRef}}
- Modify the Assessment picklist values on the Employee Crisis Assessment object
- Modify the Current Wellness Status picklist values on the Employee object

The survey page branching logic is designed to land on a page that tells the employee their workplace status based on their responses to the survey questions. We call these pages *result pages*. The default result pages say:

- You declined to respond so you must continue working remotely. Click OK to confirm.
- Based on your responses, **you're not ready to return to your workplace**. Click OK to confirm that the information you provided is accurate.
- Based on your responses, **you may return to your workplace**. Click OK to confirm that the information you provided is accurate.

In Survey Builder, each result page contains a reference in the format {{<ref>}}. The surveys included with Wellness Check have three result pages, each with a result reference. A reference can be anywhere in the survey page name. If the page name has multiple references, the first is used.





When an employee completes a survey, an Employee Crisis Assessment record is created. The reference drives the update of the record's Assessment picklist value. The three default values are:

- Declined
- COVID-19 Symptoms or Exposed
- COVID-19 No Symptoms

In Command Center Settings, create mappings from a survey reference and a language to a crisis assessment. Optionally, to track consent, enter an authorization form text name. Use one authorization form text record per language. When an employee provides consent, an Authorization Form Consent record is created. For the mapping in which the employee declines to consent, don't add an authorization form text record.

The mappings for the default values are:

Survey Result Reference	Crisis Assessment	Survey Language	Authorization Form Text
ref0	Declined	English	
ref1	COVID-19 Symptoms or Exposed	English	Wellness Authorization Text
ref2	COVID-19 No Symptoms	English	Wellness Authorization Text

Translations of the survey text are also included, if available. Use one mapping row per combination of survey reference and language. For example, if you have a survey in English and Spanish, you need two rows for each survey reference. In this mapping you would add a row that maps ref0, Declined, Spanish, and so on. For information about translating surveys, see Translate Your Surveys.

In Command Center Settings, you can map Assessment picklist values on the Employee Crisis Assessment object to Current Wellness Status picklist values on the Employee object. The mappings for the default values are:

Crisis Assessment	Wellness Status
Declined	Remote Work Only
COVID-19 Symptoms or Exposed	Unavailable
COVID-19 No Symptoms	Available to Work

Aggregated wellness status data displays in the Command Center.

These are the default picklist values for `EmployeeCrisisAssessment.Assessment` and `Employee.CurrentWellnessStatus`. You can update them and add new values.

Tip: Employee Crisis Assessment records can be created by any application. For example, a temperature-scanning device app could also create Employee Crisis Assessment records. A contact tracing app could also create Employee Crisis Assessment records. The Employee Current Wellness Status field is always updated based on the latest Employee Crisis Assessment record.

SEE ALSO:

Configure Wellness Check

Modify Wellness Surveys

To change a survey, create a copy or create a new version.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

USER PERMISSIONS

To create a survey:
- Profile that allows the user to create and send surveys

Tip: Before making major changes, see Survey Design Considerations and Map Survey Pages to the Data Model.

When you copy a survey, it isn't associated with the original survey in the database. The copied survey gets a new survey record.

When you create a new survey version, it's associated with the original survey record in the database. You can't activate a survey version if the currently active version is referenced by other objects or processes.

Open a survey in Survey Builder.

1. From the App Launcher, find and select **Surveys**.
2. Click the arrow beside a survey, and select **Open Latest Version**.
   The Survey Builder opens in a new tab.
3. If there are multiple versions of a survey, select a version in the top left.
4. In the top right, click ••• ▾, and select **Make a Copy** or **Create a New Version**.
5. You can make these changes.
   a. Modify the consent message. This is the first page that participants see when they open the survey.
   b. Add or remove survey pages.
   c. Add, modify, or remove questions on each survey page.
   d. Add, modify, or remove decision pages. A decision page tells an individual whether they're cleared to return on site. A decision page must contain a reference.
   e. Modify the thank you message. Participants see this page after they submit the survey.
   f. Change the page branching logic.
      If you change the page branching logic, verify the mapping.
6. Save your changes.
7. Click **Activate**.

SEE ALSO:

Create a Survey

Modify or Create Email Templates

Wellness Check includes an email template for each survey: Return Readiness Wellness Survey and Continuing Wellness Survey. Use these templates or create your own.

Note: Survey email templates don't allow Employee merge fields. The `{{Survey}}` text is a special token hard-coded to insert the selected survey link.

Modify or Create Email Templates in Salesforce Classic

Use the classic email templates provided, or clone and modify them.

Modify or Create Email Templates in Lightning Experience

Create one ore more Lightning email templates to make emailing members of your team more efficient and consistent.

Modify or Create Email Templates in Salesforce Classic

Use the classic email templates provided, or clone and modify them.

Note: If you installed the Workplace Command Center managed package before June 18, 2020, and upgraded to a more recent version, update the Continuing Wellness Survey and the Return Readiness Survey to include hyperlink text by following these steps before cloning or modifying the email templates.

1. From Setup, in the Quick Find box, enter *Email Templates*, and then select **Classic Email Templates**.
2. Click an email template name.
3. Click **Edit HTML Version**.
4. Replace the existing survey link with the following HTML.

```
<p><a title="Take the Survey" href="{{Survey}}">Take the
Survey</a></p>
```

5. Complete this change for both surveys.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

USER PERMISSIONS

To create or change HTML email templates:
- Edit HTML Templates

To create or change public email template folders:
- Manage Public Classic Email Templates

Clone an Email Template

1. From Setup, in the Quick Find box, enter *Email Templates*, and then select **Classic Email Templates**.
2. Select the **Wellness Survey** folder.
3. Click the email template name of the template you want to modify.
4. Click **Clone**.
5. Save it in a folder.

SEE ALSO:

Email Templates in Salesforce Classic

Modify or Create Email Templates in Lightning Experience

Create one ore more Lightning email templates to make emailing members of your team more efficient and consistent.

1. From the App Launcher, select **Email Templates**.
2. Click **New Email Template** and enter a name.
3. Click **Select Folder**, select a folder, and click **Select Folder**.
4. Compose the email to use as your template.
5. Click **Save**.

SEE ALSO:

Create an Email Template in Lightning Experience

USER PERMISSIONS

To create and send email templates:
- Lightning Experience User

To update email templates:
- Modify All Data, Manage Public Lightning Email Templates permission, or template ownership

  For email templates in an Enhanced folder: Modify All data, Edit access to the folder, or template ownership

Distribute Surveys

You can distribute surveys to one or more individuals, to all individuals at one or more locations, or to individuals who share a particular role at the selected locations. You can schedule when a survey goes out and how often. You can also deactivate a schedule when you want to use a different schedule or no schedule temporarily.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Send Surveys to One or More Employees

To check the wellness status of one or more employees, send a wellness check survey from an employee list view.

Send Surveys to One or More Locations

To check the wellness status of everyone at one or more locations, send a wellness check survey from the Locations tab. You can choose to send only to individuals assigned a particular role at the selected locations. You can choose whether to include everyone at sublocations, too.

Edit Survey Schedules

You can modify survey schedules as your team's needs change. You can change the schedule name, which survey and email template it uses, the timing and frequency of the schedule, and which role receives the survey. You can also activate or deactivate a schedule and, if you're sending to locations, include or exclude sublocations.

Review Survey History

Wellness Check provides history data for each sending of a survey. A survey history provides an audit trail you can use to verify when surveys were sent, the name of the survey sent, which schedule applied (if any), and whether the surveys were sent successfully.

Deactivate or Activate Survey Schedules

Deactivate a survey schedule when you want to use a different schedule or no schedule temporarily. If your needs have changed long term, you can edit the schedule or delete it and create a new schedule. Deactivating a survey schedule stops it from executing until it is reactivated.

Send Surveys to One or More Employees

To check the wellness status of one or more employees, send a wellness check survey from an employee list view.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

> Note: If you're sending a survey in a language that uses non-Latin-based characters, such as Japanese or Russian, be sure that your personal email encoding setting is Unicode (UTF-8). To edit your email encoding setting, click your profile picture, then click **Settings**. Your email encoding setting is under **My Personal Information** > **Language & Time Zone**. Set your email encoding to Unicode (UTF-8).

1. Do one of the following:
   - From the Command Center, click the arrow in the Wellness Status module and select **View All Individuals**.
   - From the App Launcher, find and select **Employees**.
2. Change your list view to All Employees, if needed.
3. Select the employees you're sending the survey to.
4. Click **Send Survey**.
5. Select a survey.
6. Select the email template that matches the survey you're sending.
7. Indicate when you want to send the survey.
   - If you want to send the survey now, select **Send now**.
   - If you want to send the survey once later or more than once at regular intervals, select **Schedule**.
     a. Select how frequently to send the survey. Your choices are Once, Daily, or Weekly.
     b. Specify a start date and time for sending the survey.
8. If you want to recipients to log in to access the survey, select **Require authentication**.

   Authenticated surveys have specific configuration requirements, and you can't send a survey to recipients who don't meet those requirements. For details, see Configure Survey Authentication.
9. Optionally, select **Use this survey and template as defaults**.
10. Click **Send Survey** or **Schedule Survey**.

    The button shown depends on when you're sending the survey.

> Note: Surveys sent to an employee list view are limited to 9,999 employees. If necessary, create filtered list views and send the survey in smaller batches.

Send Surveys to One or More Locations

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

To check the wellness status of everyone at one or more locations, send a wellness check survey from the Locations tab. You can choose to send only to individuals assigned a particular role at the selected locations. You can choose whether to include everyone at sublocations, too.

Note: If you're sending a survey in a language that uses non-Latin-based characters, such as Japanese or Russian, be sure that your personal email encoding setting is Unicode (UTF-8). To edit your email encoding setting, click your profile picture, then click **Settings**. Your email encoding setting is under **My Personal Information** > **Language & Time Zone**. Set your email encoding to Unicode (UTF-8).

Important: Surveys can take up to 30 minutes to send from a location. Don't click Send Survey more than once. We don't recommend sending more than 10,000 emails at once. If you have other queueable Apex jobs running, the limit can be lower. Create filtered list views and send in smaller batches.

1. Go to the Locations tab.
   - In the Command Center, you can open Locations from the **Location Workplace Status** component. Click the arrow and select **View All Locations**.
   - From the App Launcher, find and select **Locations**.
2. Select one or more locations, then click **Send Survey**.
3. Select a survey.
4. Select the email template that matches the survey you're sending.
5. The default is to send the survey to all individuals at each selected location. To send the survey only to individuals assigned a particular role at each selected location, select a role from the **Whom do you want to send this survey to?** list.

   The total number of recipients updates automatically, so you can see how your choice impacts the number of people sent a survey.

   If the role you want to send to isn't listed, contact your Salesforce Admin. The list can be customized for your org.
6. Review the total number of recipients you're sending to. If you don't want to send surveys to people assigned to the sublocations of the selected locations, deselect **Send surveys to recipients at sublocations**.

   By default, the survey is sent to everyone assigned to each of the selected locations and to its sublocations. To send surveys only to people at the selected locations, deselect **Send surveys to recipients at sublocations**.The total number of recipients updates automatically, so you can see how your choice impacts the number of people sent a survey.
7. Indicate when you want to send the survey.
   - If you want to send the survey now, select **Send now**.
   - If you want to send the survey once later or more than once at regular intervals, select **Schedule**.
     a. Select how frequently to send the survey. Your choices are Once, Daily, or Weekly.
     b. Specify a start date and time for sending the survey.
8. If you want to recipients to log in to access the survey, select **Require authentication**.

   Authenticated surveys have specific configuration requirements, and you can't send a survey to recipients who don't meet those requirements. For details, see Configure Survey Authentication.
9. Optionally, select **Use this survey and template as defaults**.
10. Click **Send Survey** or **Schedule Survey**.

The button shown depends on when you're sending the survey.

Note: Surveys sent to a location list view are limited to 9,999 locations. If necessary, create filtered list views and send the survey in smaller batches.

Edit Survey Schedules

You can modify survey schedules as your team's needs change. You can change the schedule name, which survey and email template it uses, the timing and frequency of the schedule, and which role receives the survey. You can also activate or deactivate a schedule and, if you're sending to locations, include or exclude sublocations.

What can't you modify? You can't change the recipient type after a schedule is created. For example, you can't change a schedule sending to employees to a schedule that sends to recipients at selected locations. Also, the next send date and time is calculated automatically; if the next send date isn't what you expect, modify the schedule.

You can change the schedule owner by selecting a survey schedule in list view and clicking **Change Owner**.

1. From the App Launcher, find and select **Survey Schedules**.
2. In the list view, click the name of the survey schedule you're interested in to view its details.
3. Click **Edit**.

   Modify the schedule as needed. You can change these attributes of an existing survey schedule.

   - Change the survey schedule name. Choose a name that makes this survey schedule easy to find in a list.
   - Deactivate an active survey or reactivate an inactive survey. For details, see Deactivate or Activate Survey Schedules.
   - Choose a different survey to send out on this schedule.
   - If your recipient type is Location, include or exclude sublocations.
   - Change the start date or the end date. Specify a time based on your local time zone. If you change the start date, the next send date is recalculated to reflect the change after you save the updated schedule.
   - If your recipient type is Location, select which individual role you want to send the survey to.
   - Select a different frequency for sending out the survey. You can select Once, Daily, or Weekly.
   - Select a different email template.

4. Click **Save**.

Review Survey History

Wellness Check provides history data for each sending of a survey. A survey history provides an audit trail you can use to verify when surveys were sent, the name of the survey sent, which schedule applied (if any), and whether the surveys were sent successfully.

If you send a survey to many recipients, your request can be carried out by multiple batch jobs. The history of a survey sent out in multiple batch jobs is presented as a single history, because it represents a single request. If any of the batch jobs fails, the status of the entire survey send is `Failed`. The start time in the history is when the first batch job began; the end time in the history is when the last batch job completed.

1. From the App Launcher, find and select **Survey History**.
2. In the list view, click the name of the survey history you're interested in to view its details.

   Note: If the survey you're interested in is sent out on a repeating schedule, there is a separate survey history for each sending. If you're interested in a specific sending, check the start and end times to be sure you're reviewing the right survey history.

   A survey history includes the following fields.

Survey History Number
A sequential autogenerated number prefixed by `SH-` that uniquely identifies the history.

Survey Schedule
For surveys sent out according to a schedule, the name of the schedule. For surveys sent out without a schedule, the value of this field is null.

Start Date
The date and time that the system started sending out the surveys.

End Date
The date and time that the system finished sending out the surveys.

Status
The overall status of the sending operation.

Possible values are:

- `Failed`
- `Processing`
- `Succeeded`

Created By
The user who originally created the schedule and the date and time the schedule was created.

Owner
The user who owns the survey schedule in force for this sending of a survey. Schedule ownership can be transferred, so the user named in this field can be different from the user named in the `Created By` field. Not applicable for surveys sent without a schedule.

Last Modified By
The user who last modified the survey history record and the date and time of the modification.

Deactivate or Activate Survey Schedules

Deactivate a survey schedule when you want to use a different schedule or no schedule temporarily. If your needs have changed long term, you can edit the schedule or delete it and create a new schedule. Deactivating a survey schedule stops it from executing until it is reactivated.

When you deactivate a schedule, the Next Send Date field is cleared. The field is cleared, because we can't determine when the next send occurs until the schedule is reactivated.

1. From the App Launcher, find and select **Survey Schedules**.
2. In the list view, locate the schedule you want to deactivate, then click its dropdown and select **Edit**.
3. Deselect the Active checkbox and click **Save**.
4. When you're ready to reactivate the survey schedule, go to the App Launcher and find and select **Survey Schedules**.
5. In the list view, locate the schedule you want to reactivate, then click its dropdown and select **Edit**.
6. Select the Active checkbox and enter a new **Start Date**.

   The survey schedule needs a new start date, because you restart the schedule when you reactivate it.

7. Click **Save**

   After you reactivate a survey schedule, the Next Send Date value is recalculated and shown in the list view.

Respond to Surveys

Each email invitation contains a survey link that is unique to the employee. Employees don't have to authenticate to follow the link to the survey unless you specify that authentication is required when sending or scheduling the survey.

Employees can respond to surveys from their mobile devices or from a desktop. For a complete list of supported mobile devices, see Requirements for the Salesforce App.

Important: Each email invitation contains a survey link that is unique to the employee. Employees don't have to log in to respond to the survey unless you require authentication when sending or scheduling the survey. (For details, see Configure Survey Authentication.) Employees shouldn't share links or forward the email containing the link because anyone who clicks the link can answer the survey. Responses are associated with the employee to whom the link was sent.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Analyze Responses and Take Action

When the Wellness Survey is completed, the survey response updates the employee data model. This data is captured in the Employee Crisis Assessment and Employee data records, and then visualized through aggregated charts in the Command Center.

View Wellness Data in the Command Center
For a high-level view of wellness data, use the Command Center. Wellness data is aggregated with location data and in easy to read graphs and tables.

View Wellness Data in Employee Records
If you are entrusted with privileged access that allows you to view detailed wellness data for each employee, use this access to accomplish specific tasks while respecting employees' privacy.

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View Wellness Data in the Command Center

For a high-level view of wellness data, use the Command Center. Wellness data is aggregated with location data and in easy to read graphs and tables.

To assess employee and workforce readiness by location, visualize and explore data in the Command Center.

1. From the App Launcher, find and select Command Center.

Example: For example, invite Available employees to return to their workplaces, resend the survey to maintain current wellness statuses, and initiate risk mitigation processes.

SEE ALSO:

All Systems Go! Use Workplace Command Center

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

USER PERMISSIONS

To access Workplace Command Center

- All Workplace permission set groups can access Workplace Command Center.

View Wellness Data in Employee Records

If you are entrusted with privileged access that allows you to view detailed wellness data for each employee, use this access to accomplish specific tasks while respecting employees' privacy.

For example, you may want to create a list of users who haven't updated their wellness data in over a month and send them the Continuing Wellness survey.

View Employee and Employee Crisis Assessment Records.

1. From the App Launcher, enter `Emp` and click **Employees**.
2. From the App Launcher, enter `Emp` and click **Employee Crisis Assessments**.
3. In an Employee record, look at the **Current Wellness Status** field.
4. Open an Employee Crisis Assessment record, which is created when a Survey is completed. Look at the **Assessment** field.

Note:

- An **Assessment** value of Unknown usually indicates that no survey response has been submitted. Unknown is the default value.
- These fields are updated based on mapping logic that you can configure. See Configure Wellness Check Survey Mappings.
- To view all Employee Crisis Assessments records, create a List View, select **All employee crisis assessments** in the Filters, and Save.

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USER PERMISSIONS

To access Workplace Command Center

- All Workplace permission set groups can access Workplace Command Center.

Note: Employee Crisis Assessment doesn't show up as a Related List on Employee.

Modify Survey Process Settings

Edit processing time, batch size, and other settings to optimize Work.com survey processing in your org.

Configure how your org sends and processes survey batches for optimal performance. Send a survey to a large audience in small batches, or lower the batch size for processing the responses if you encounter issues with large batches.

1. From Setup, in the Quick Find box, enter `Custom Settings`, and then select **Custom Settings**.
2. Click **Manage** next to the Settings label.

   If you don't see Default Organization Level Value settings, click **New** near the top of the page (not the New button at the top of the list view).

EDITIONS

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Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

3. Edit the Send Survey Batch Size field. Higher values speed up the process. The number must be from 1 through 5000. In version 2 and later, the default is 1000. In version 1.5 and earlier, the default is 200. Or, edit the Location Wellness Staging Batch Size field. Higher values speed up survey response processing. The number must be from 1 through 200. The default is 200. Lower values for these fields keep your org under governor limits
4. Edit the Location Wellness Staging Schedule Mins field to change how long to wait between batches. The number must be from 0 through 1440. The default is 5. Longer wait times slow down processing but help keep you under governor limits.
5. Select or deselect Employee Individual Sync Disabled. When selected, updates to the Employee record are *not* synced with the Individual record.

6. Click **Save**.

SEE ALSO:

Understand and Disable Workplace Command Center Triggers

All Systems Go! Use Workplace Command Center

Workplace Command Center gives you a top-down view of the readiness states of the workforce and locations of your business. You can use Workplace Command Center to organize critical information such as regional health data and information about your company that pertain to your recovery path. Workplace Command Center can help you resume your business in an orderly, safe, and manageable way.

The Back-to-Work Challenge

If your company is like most, in just a few weeks your working model drastically changed.

Get Started with Workplace Command Center

The Command Center is a high-level dashboard with several components. Change the displayed data and focus your view by customizing the components.

Check the Status of Your Workplaces

Use the command center to see the status of all your workplace locations. The Location Workplace Status component gives you an at-a-glance view of the back-to-work progress of your workplaces.

Check the Health of Your Workforce

The Wellness Status component shows the overall status of your workforce, filtered by the Location filter.

See Employee Availability by Location

The Wellness Status by Location component provides a complete scrollable list of all the locations or sublocations, such as individual floors of a building, that are present in the current view for a selected status.

See Shift Metrics and Planned Occupancy at a Glance

The Shifts at a Glance component provides an overview of location occupancy and shifts. Quickly see how many people are available, how many open seats are in each location, and the ratio of open seats to assigned shifts.

Track Critical Tasks Using the Operations Feed

The Operations Feed component provides a way for both users and other Workplace Command Center components to create tasks that are specific to your back-to-work effort.

See COVID-19 Information from Around the World

The Workplace Command Center COVID-19 Tracker components show confirmed cases and other metrics from around the world.

SEE ALSO:

Downloadable User Guides

The Back-to-Work Challenge

If your company is like most, in just a few weeks your working model drastically changed.

You went from doing business at full tilt with most of your employees working on-site to operating at a greatly reduced level. Most of your employees who are still engaged are likely doing so from home. Challenging times.

Even though few anticipated these events, we all anticipate getting Back To Normal. The path to normal for your business doesn't just happen. You make it happen with careful coordination. You want to bring people back to your worksites when they're ready. You want to prepare your sites to host them safely. You want to support physical distancing. And you must comply with government policies every step of the way. Workplace Command Center is designed to get your company back to work—safely and deliberately.

EDITIONS

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Available in: **Enterprise** and **Unlimited** Editions

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How Workplace Command Center Helps You
Workplace Command Center helps you resume your business in an orderly way by providing a single place to do several things.

How Workplace Command Center Helps You

Workplace Command Center helps you resume your business in an orderly way by providing a single place to do several things.

Workplace Command Center provides a single place to

- See the readiness status of each of your work sites
- View the return readiness of your team, both globally and per work site
- Coordinate, automate, and scale emergency-response and recovery-management workflows
- Set up custom work shifts that correlate with your current occupancy limits
- Streamline communications with your employees during back-to-work stages
- Review public sector and government data that can affect your back-to-work plan, and that you can use to trigger recovery-management workflows
- Integrate any data critical to your business through custom widgets

These features help you pinpoint what you can and cannot control. Work.com helps you guide your company through its back-to-work challenges. And, it lets you provide clearer paths to stabilize, normalize, and accelerate your recovery.

For information on how to get and set up Workplace Command Center, see the setup guide, Install and Configure Workplace Command Center on page 4. It includes instructions on how to get and configure the Workplace Command Center and its default widgets.

Later versions of this guide will cover example use cases, such as automating a workflow based on a data value or an event.

Get Started with Workplace Command Center

The Command Center is a high-level dashboard with several components. Change the displayed data and focus your view by customizing the components.

From the App Launcher (⋮⋮⋮), find and select **Command Center**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

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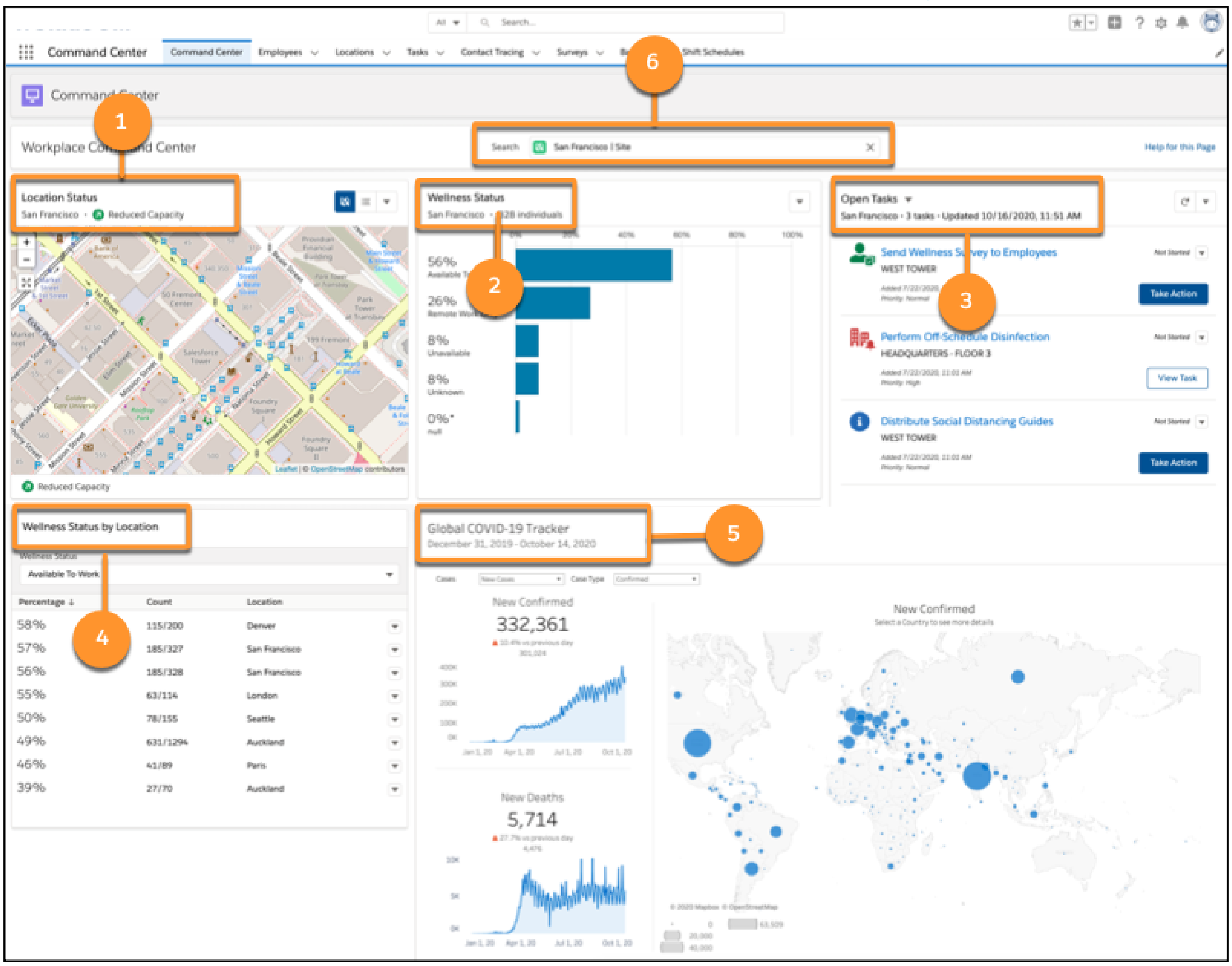


The Location Status component (1) shows your company's workplaces in a map view. The Wellness Status component (2) shows the overall status of your workforce. Use the Operations Feed (3) to track and create tasks that are specific to your back-to-work effort. The Wellness Status by Location component (4) shows a complete scrollable list of all the locations or sublocations, in the current view for a selected status. The Global COVID-19 Tracker (5) depicts worldwide confirmed cases and other metrics. The Location filter (6) lets you narrow your search to a specific location.

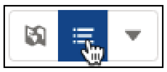
Locations and Filtering

The Location filter at the top of Workplace Command Center is a completion search box. After you type three characters of a location workplace, suggested matches appear as dropdown options.

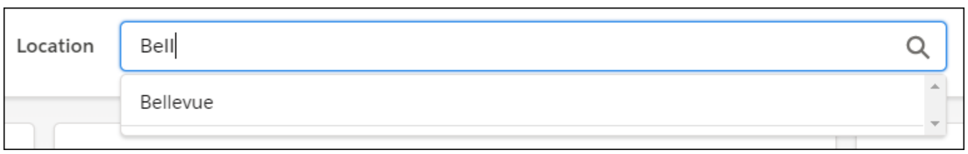
Locations and Filtering

The Location filter at the top of Workplace Command Center is a completion search box. After you type three characters of a location workplace, suggested matches appear as dropdown options.

Find the locations available to you. In the Location Status component, click List View to see your locations.



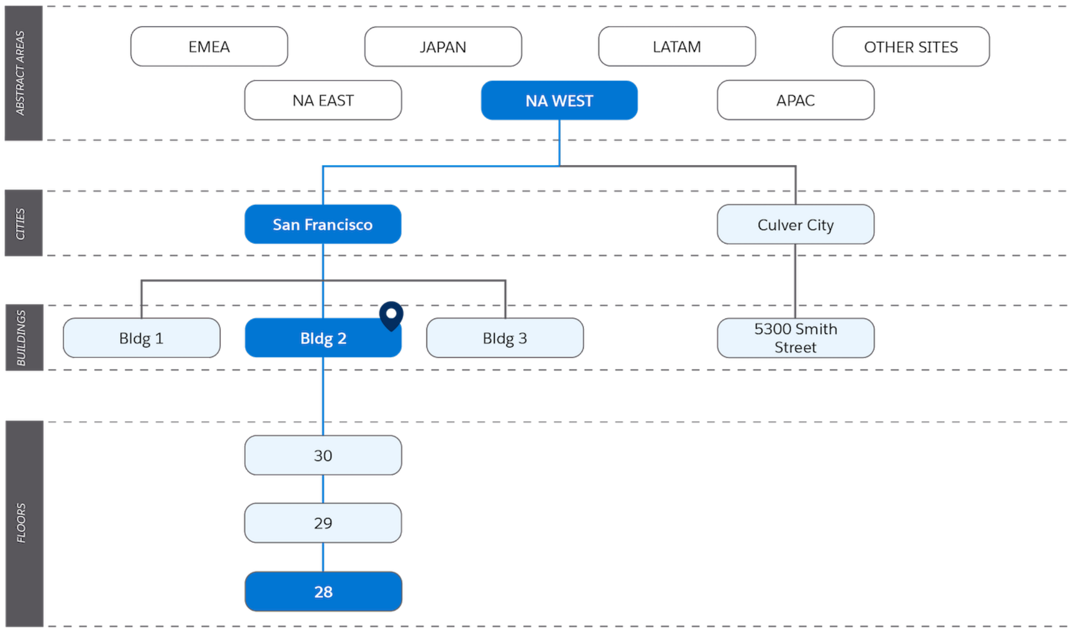
Enter an available location in the Location filter at the top of Workplace Command Center. This filter sets the scope for all the installed components to a single location. The filtering persists until you choose another location, or until you clear the filter.



To clear the filter, click the **X**. Clearing the filter resets the view to All Locations.

By default, you can search the level 1 locations only, not sublocations. However, a Salesforce Admin can enable location search filtering for all levels.

If location search filtering at all levels is enabled, the one location in the path with a visitor address doesn't have to be the level 1 location. Instead, level 1 locations can be abstractions that help you group sublocations with a shared characteristic. For example, in this hierarchy the level 1 location is the abstract location NA WEST, representing company offices in western North America. The path from NA WEST down to the sublocation at the lowest level, representing the 28th floor, has exactly one location with a visitor address, the building designated Bldg 2.



Reduce Batch Size to Support Large-Scale Direct Child Locations

A single location in a Work.com data model can have many or even thousands of direct child locations. But when a single location has an extremely large number of direct children, the error message `First error: wkcc: Too many query rows: 50001` can appear. If you see this error message, your data is still reaggregated. Consider reducing the location wellness fact batch size until the error no longer appears.

SEE ALSO:

Enable Location Search Filtering at All Levels (Optional)

Reduce Batch Size to Support Large-Scale Direct Child Locations

A single location in a Work.com data model can have many or even thousands of direct child locations. But when a single location has an extremely large number of direct children, the error message `First error: wkcc: Too many query rows: 50001` can appear. If you see this error message, your data is still reaggregated. Consider reducing the location wellness fact batch size until the error no longer appears.

Don't lower the setting more than is necessary. The lower you set the location wellness fact batch size, the more batch executions required each time your data is reaggregated.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

USER PERMISSIONS

To manage, create, edit, and delete custom settings:
- Customize Application

Important: In case you have to reduce the location wellness fact batch size more than once, determine in advance your recommended minimum size.

The recommended minimum size isn't the same for everyone. It depends on the number of wellness statuses defined.

```
(total number of possible wellness statuses) + 1 = recommended minimum location wellness
 fact batch size
```

For example, if you added two wellness statuses to the default four wellness statuses, your recommended minimum location wellness fact batch size is 7.

1. From Setup, in the Quick Find box, enter `Custom Settings`, then click **Custom Settings**.
2. Next to the settings for the Workplace Command Center application, click **Manage**.
3. Reduce the value in the Location Wellness Fact Batch Size field by 50% or to your recommended minimum size, whichever is greater.

   If necessary, repeat this step, reducing the size by 50% increments until the error is no longer generated or until you reach the recommended minimum size. If you reduced the size to the recommended minimum and the error persists, contact Salesforce Support.

Check the Status of Your Workplaces

Use the command center to see the status of all your workplace locations. The Location Workplace Status component gives you an at-a-glance view of the back-to-work progress of your workplaces.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

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[View the Status of Locations and Sublocations](#)

View status by location, look into the status for smaller areas, and view and edit the location hierarchy.

[What Is a Location Status?](#)

Keep track of whether your locations are ready to open or are still closed.

[View Workplaces on a Map or in a List](#)

In map view, your workplaces are plotted on a geopolitical map. In list view, the names of your organization's workplace locations are grouped by status. It's the same information presented in map view, but in a tabular format.

View the Status of Locations and Sublocations

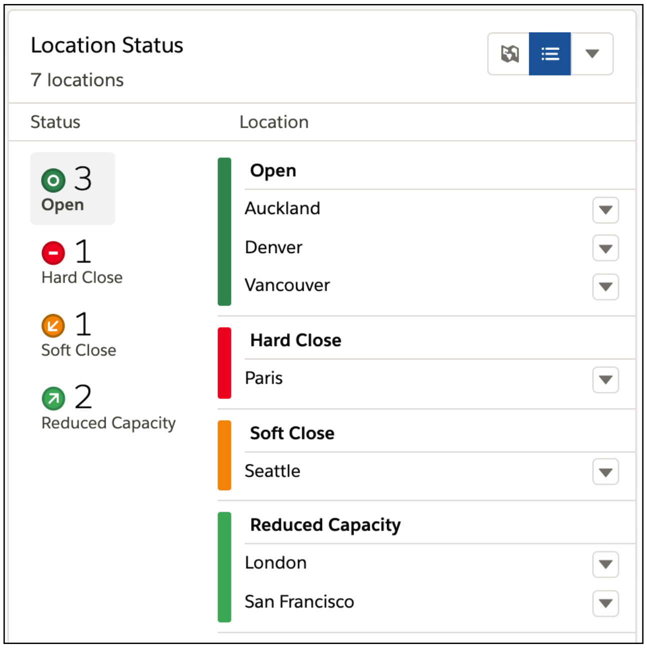
View status by location, look into the status for smaller areas, and view and edit the location hierarchy.

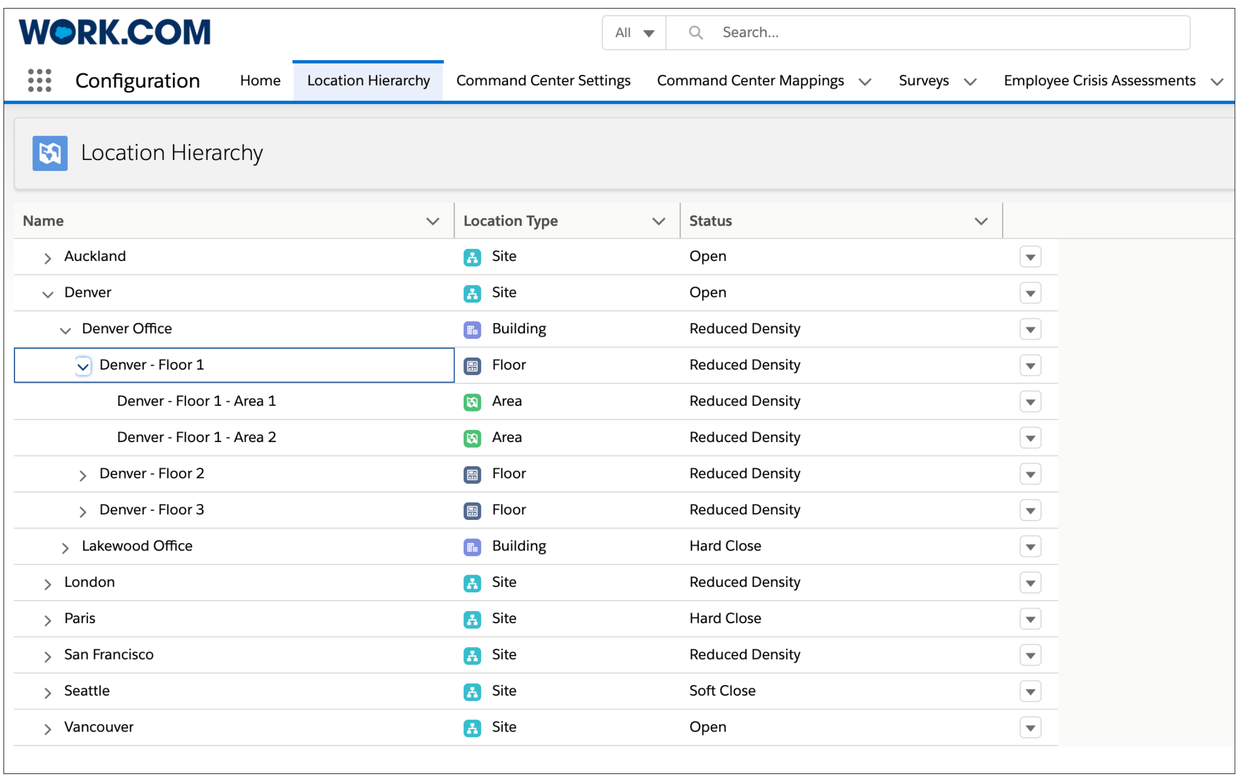
A location can be a building, a farm, a factory, or anywhere your employees normally congregate during their regular workday. Locations are depicted on the Location Status component's map view.

Sublocations are smaller areas within locations. You can nest up to 13 levels of sublocations.

The nature of sublocations depends on the kind of workplace. If your workplace location is a building, the sublocations can be floors. If your workplace location is a warehouse, the sublocations can be pick zones.

Sublocations are shown on the Location Status component's list view, and on the Location Hierarchy component.





The location hierarchy component shows your location records in hierarchical order. You can quickly view sublocations by expanding the nested tree. To edit the hierarchy or status of whether they're ready to open or still closed, you can use the dropdown menu.

Note: If there are 100 or more locations at any hierarchy level, click the Show More Locations link as needed to expand the list by up to another 100 locations. Alternatively, go to the row-level menu and select View All Child Locations or click the location name to go to that location's detail page.

To add the Location Hierarchy component, from App Launcher, find and select **Location Hierarchy**.

What Is a Location Status?

Keep track of whether your locations are ready to open or are still closed.

The Location Status component shows one of these status icons for each of your locations:

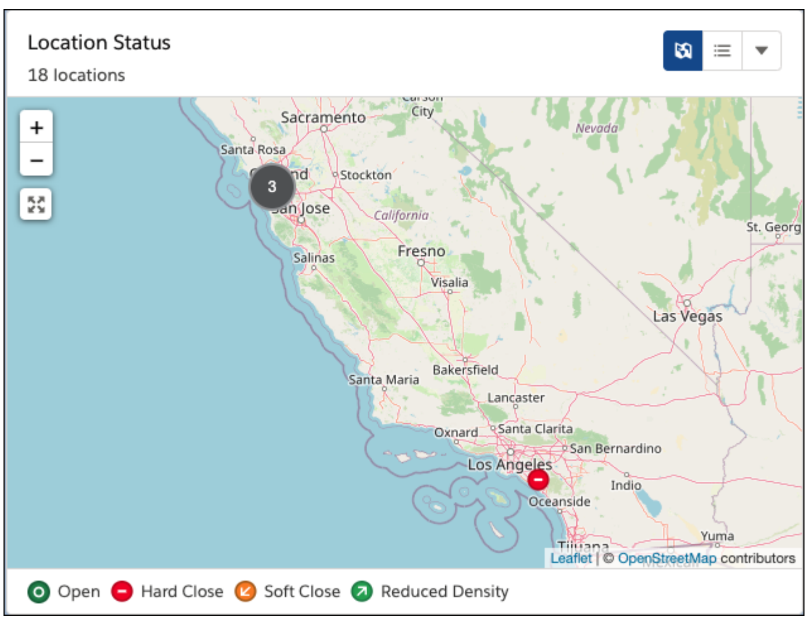
Open
: The site is under no restrictions.

Reduced Density
: The site is open, with physical distancing restrictions in place. And, a limited number of employees can be present at any given time.

Soft Close
: The site is open. Employees are encouraged not to enter the building, but they can still get in and aren't forced to leave.

Hard Close
: Entry to the site is strictly forbidden, and no employees are working on site.

Note: When you zoom out in map view, the status of locations that are geographically close to one another roll up into a single marker that represents the cluster. If the locations have the same location workplace status, the cluster marker is the color of the shared status. But if at least one location has a status that differs from the status of nearby locations, the cluster marker is gray. In both cases, a number on the cluster marker indicates the number of locations the marker represents. In this example, the gray circle showing a 3 represents three locations of mixed status, but the view is zoomed out too far to show the locations as separate markers.

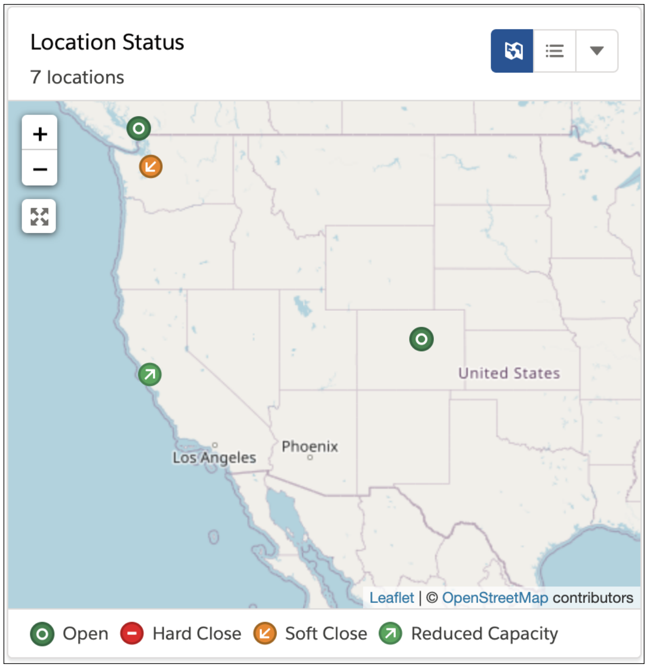


Your admin can configure more Location status types. See Install and Configure Workplace Command Center on page 4 to learn how.

View Workplaces on a Map or in a List

In map view, your workplaces are plotted on a geopolitical map. In list view, the names of your organization's workplace locations are grouped by status. It's the same information presented in map view, but in a tabular format.

Each workplace is plotted with a pin that represents one of the statuses listed in the legend at the bottom of the component.



To identify the location represented by a pin, click the pin to show the description tooltip connected to the pin. If no location filter is set, the map is scaled to include all your workplaces.

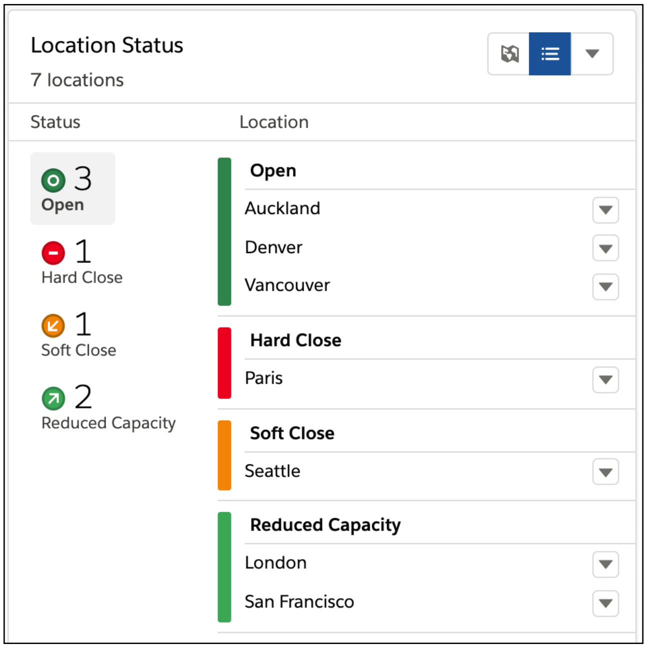
In this case, the number 10, the highlight metric, represents the total number of your workplaces.

You can zoom in and out, as with most maps, using the + and - buttons.

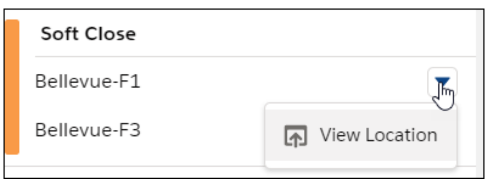
Note: The zoom factor doesn't affect the number of workplaces displayed. However, when you zoom out in map view, the status of locations that are geographically close to one another roll up into a single marker that represents the cluster. For details, see What Is a Location Status?

If the location filter is set to a location, the map zooms to that location. Then the highlight metric changes to the total number of sublocations. For example, if the map shows a location with five floors as sublocations, the number displayed is 5.

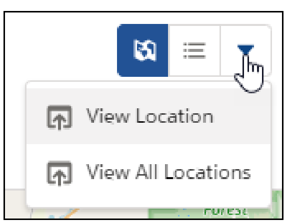
The list view shows the names of your organization’s workplace locations, sorted by status.



On the left, you see a tabulation by status of the number of location workplaces or sublocations. On the right, you see all locations or sublocations listed and grouped by their current readiness status.



To see the detail page for a specific location or sublocation, click the dropdown arrow and select **View Location**. If the location filter is set to a location, you can choose **View Location** or **View All Locations** from the dropdown arrow at the top right of the component.



Note: If you're viewing locations for the first time, View All defaults to Recently Viewed (which is empty). To see a list of locations, click the dropdown arrow next to Recently Viewed and choose another list view.

When no location filter is applied, this component includes all workplaces. When a location filter is applied, the list includes all sublocations within the current workplace.

If you've used the location filter to narrow your results to a location, only that location and its sublocations display. Filtering persists until you choose another location, or until you clear the filter.

Check the Health of Your Workforce

The Wellness Status component shows the overall status of your workforce, filtered by the Location filter.

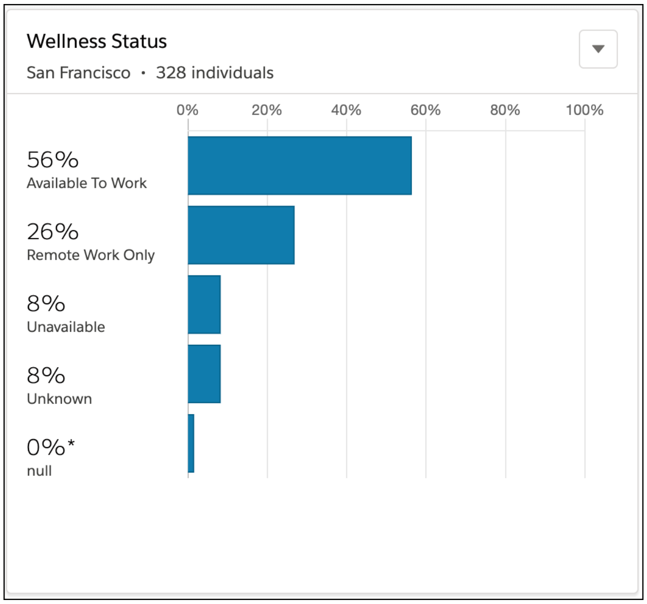
The top of the component displays the total number of people ready to work.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.



The rest of the component is a bar graph broken down by all wellness status categories.

Each status category value shows as a percentage. A tooltip includes the number of people that each percentage represents.

The percentages add up to 100%. To prevent confusion, “<1” and “>99” are displayed in those cases where the percentages would be 0 and 100 due to rounding. A value of exactly zero is displayed as “0.0”; exactly 100% is displayed as “100.0.”

If you decide that the percentages shown should be investigated further, create a task and assign it to the appropriate person. To learn more, see Track Critical Tasks Using the Operations Feed.

As shipped, wellness status categories are

Available to Work
: People who are Available to Work are ready to return to their assigned workplace.

Remote Work Only
: People who are Remote Work Only declined to provide wellness information.

Unavailable
: People who are not yet cleared to return to their assigned workplace.

Unknown
: People whose status is not known.

See Employee Availability by Location

The Wellness Status by Location component provides a complete scrollable list of all the locations or sublocations, such as individual floors of a building, that are present in the current view for a selected status.

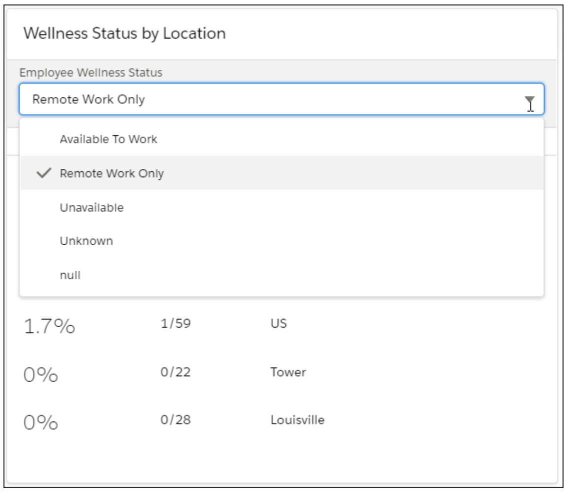
You can narrow the results shown in the Wellness Status by Location component to a sublocation by using the location filter.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.



For the currently selected individual's wellness status, the component shows the percentage and ratio of the people who are associated with that wellness status. These totals are aggregated from the responses to your wellness survey.

As shipped, wellness categories are the same as those in the Wellness Status component.

The list is ordered by decreasing percentage. To prevent confusion, "<1" and ">99" are displayed in those cases where the percentages would be 0 and 100 due to rounding. A value of exactly zero is displayed as 100%; exactly 100% is displayed as "100.0."

The wellness-count ratio represents the number of individuals in the current view that have the selected status divided by the total number of individuals in the current view.

When no location filter is applied, this component includes all workplaces. When a location filter is applied, the list includes all sublocations within the current workplace.

To display percentages for a different status, select it from the dropdown list.

See Shift Metrics and Planned Occupancy at a Glance

The Shifts at a Glance component provides an overview of location occupancy and shifts. Quickly see how many people are available, how many open seats are in each location, and the ratio of open seats to assigned shifts.

USER PERMISSIONS

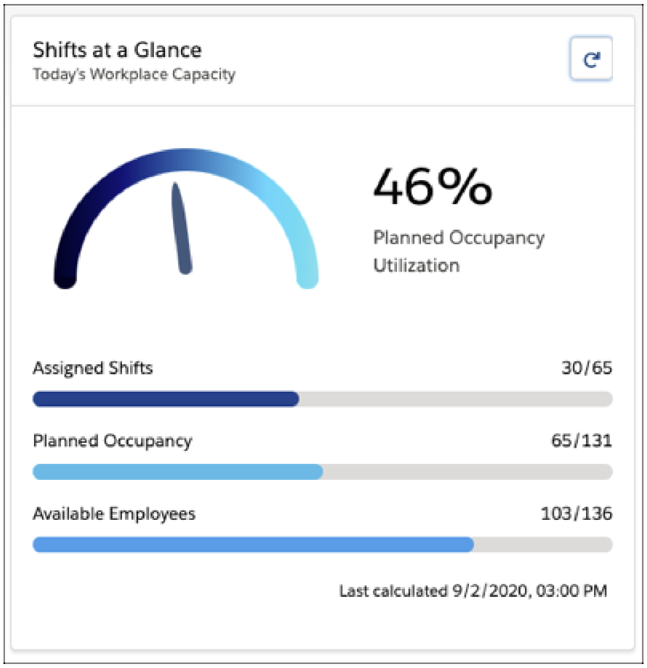
To view shift data in Command Center:

- Workplace Command Center Access, Workplace Shifts Command Center, and Workplace Shifts Command Center App Settings permission sets

Note: The Shifts at a Glance component is available with Shift Management for Work.com.

The Shifts at a Glance component shows workplace occupancy, available employees, and assigned shifts for the current day. Select a parent location to filter the data to only that location and its sublocations.

Shift data is calculated hourly and stored in the Shift Management Metrics object.



The Shifts at a Glance component provides the following metrics:

Planned Occupancy Utilization

The number of assigned shifts over the planned occupancy as a percentage.

Assigned Shifts

Shows the number of shifts assigned to an employee out of the total available shifts. Assigned shifts are calculated from service appointments where the Status Category field is Accepted. Assigned shifts can be tentative or confirmed by the employee. Because the facility plan creates shifts based on the planned occupancy, the planned occupancy matches the number of total shifts.

Planned Occupancy

The reduced occupancy compared to the location's total occupancy. Planned occupancy is calculated from the reduced occupancy percentage set in the location's facility plan.

Available Employees

Employees who indicated availability for today out of the total eligible employees. Eligible employees have an active service territory membership and a Wellness Status of Available to Work. Available employees have an associated shift with the status of Confirmed.

SEE ALSO:

Complete the Recommended Setup for Shift Management

Track Critical Tasks Using the Operations Feed

EDITIONS

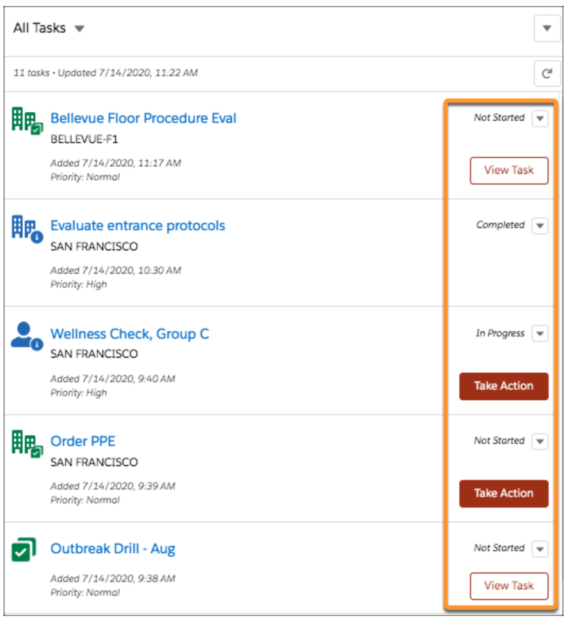
Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

The Operations Feed component provides a way for both users and other Workplace Command Center components to create tasks that are specific to your back-to-work effort.

Because the Operations Feed component lists standard Salesforce tasks, you can use the existing Tasks features to view, create, and modify back-to-work tasks. Salesforce system administrators can also extend the standard functionality by creating tasks associated with automated processes. Tasks associated with automation are ideal for rote actions, such as checking or updating a status field on a batch of records and sending Wellness Check surveys based on the status field value. Talk to your admin to set up tasks with automated processes for your org.



Note: Salesforce system admins and Command Center planner personas with permission can create tasks. Also, any AppExchange application (including a command center component) can create and manage tasks in the Operations Feed using the Salesforce API. To learn more, see Work.com Developer Guide.

Create Tasks Manually in the Operations Feed

We recommend that a Workplace admin create most tasks for the Operations Feed automatically and in response to another process or trigger in your org. Talk to your administrator if you'd like to set up tasks that can be created or run automatically.

Manage Tasks in the Operations Feed

Manage tasks in the Operations Feed so everyone knows the status of your plans.

Filter Tasks in the Operations Feed

Filter tasks so you can focus on what you need to do.

Create Tasks Manually in the Operations Feed

We recommend that a Workplace admin create most tasks for the Operations Feed automatically and in response to another process or trigger in your org. Talk to your administrator if you'd like to set up tasks that can be created or run automatically.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

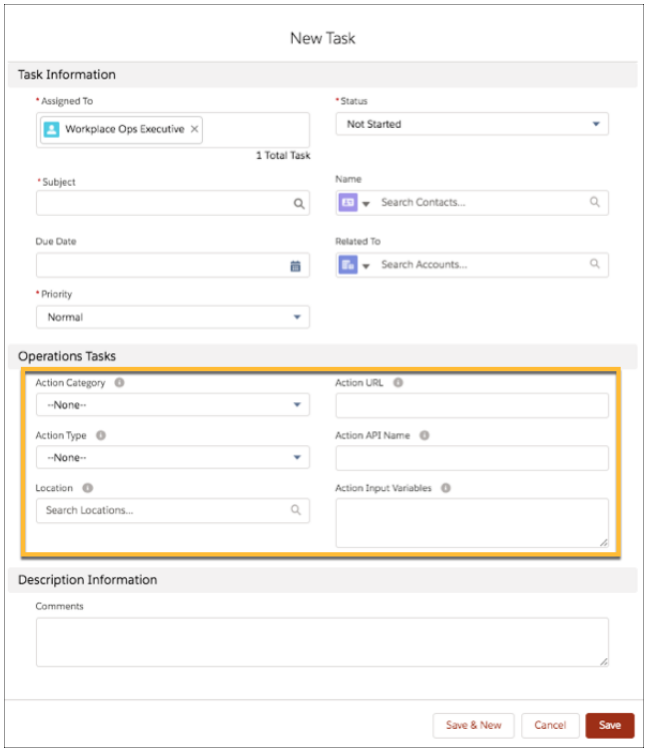
Workplace Command Center is available as an add-on license.

USER PERMISSIONS

To create tasks
- Edit Task

1. From the App Launcher, choose **Tasks**.
2. From the dropdown menu on the Tasks listview, select **New Task**.
3. Assign the task to a person.
4. Set the Status, Subject, and Priority.
5. To display the task in the Operations Feed, it must have an **Action Category**. The task needs a value in this field to appear in the Operations Feed. The icon on the task in the Operations Feed matches the Action Category.
6. Select an **Action Type**.
   a. To create a simple task, select **None**. This action creates a task with a View Task button, which leads to the task record.
   b. To create a task with an associated record detail page or URL, click **URL**. Enter a target URL for the task in the **Action URL** field. The URL can include parameters and can be absolute or relative to your Salesforce instance. This action creates a task with a Take Action button in the Operations Feed, which leads to the associated URL.
   c. To create a task associated with a flow created by the admin, select **Flow**. Enter the Action API Name set when creating the flow.
7. To relate a task to a location, specify a location in the Location field.
8. Click **Save**.

Note: If you select the Action Type URL, you must enter a value in the Action URL field for the task to be associated with a new target page. If you select the Action Type Flow, you must also enter a value in the Action API Name for the task to run the associated automation. Contact your Salesforce system administrator for more information and values for this field.



SEE ALSO:

Create Automated Tasks for the Operations Feed

Manage Tasks in the Operations Feed

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

Manage tasks in the Operations Feed so everyone knows the status of your plans.

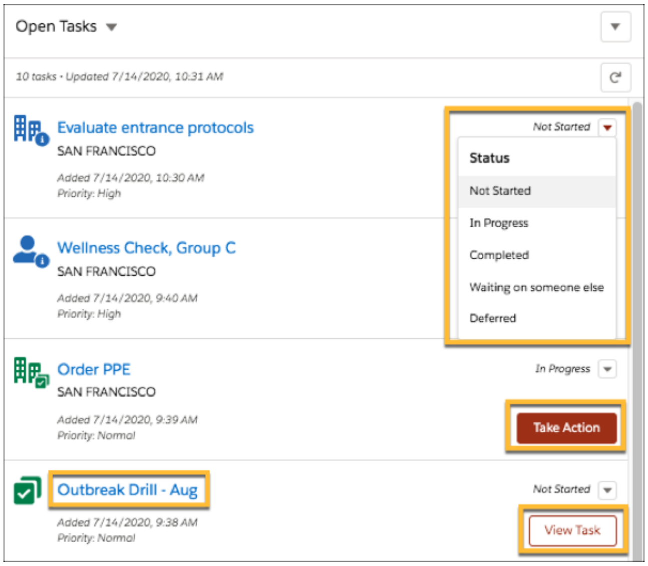
From the Operations Feed, you can view a task record, run an automated action associated with a task, and update the task status.

Several different types of tasks can appear in the Operations Feed. Simple tasks create text-based records and are available by default. Your Salesforce system administrator can also set up and associate automated processes with tasks. For example, say you have a task that launches a screen flow for entering or editing information, or a task that automatically checks records and sends a survey based on the field values. The types of tasks you see in the Operations Feed depends on how your Salesforce system administrator configures the Work.com Command Center for your organization.

To view a task record and see task details, click the task summary. You can also click **View Task** on a simple task to see details for simple tasks.

To update any task status, use the dropdown arrow next to the status. When a task is complete, the Take Action or View Task button disappears from the task.

To start the process associated with an automated task, click **Take Action**. When complete, the task status updates based on the results.



Talk to your Salesforce system administrator to find out if automated tasks are available in your org and for more information about how tasks are configured.

Note: Screen flow pause isn't supported in the Workplace Command Center Operations Feed. Any pause button that appears on a screen flow within a task causes an error.

Filter Tasks in the Operations Feed

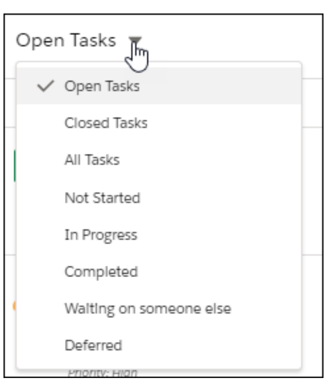
Filter tasks so you can focus on what you need to do.

When you create a task, you can pair the location to a specific location. Then you can filter tasks by location.

1. On the Home tab, clear any location filter by clicking the **X** in the Location filter field.
2. Type the first few characters of the location or sublocation for which you want to see tasks.
3. Select the location.

   The task list shows only tasks for the filtered location until you change or clear the location filter.

You can also filter tasks by status. Select the status from the dropdown in the Operations Feed component.



EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

USER PERMISSIONS

To filter tasks
- Edit Task

Note: Filters build on each other. If you select a location, and then select a task status, you see tasks for that location and that status only.

See COVID-19 Information from Around the World

EDITIONS

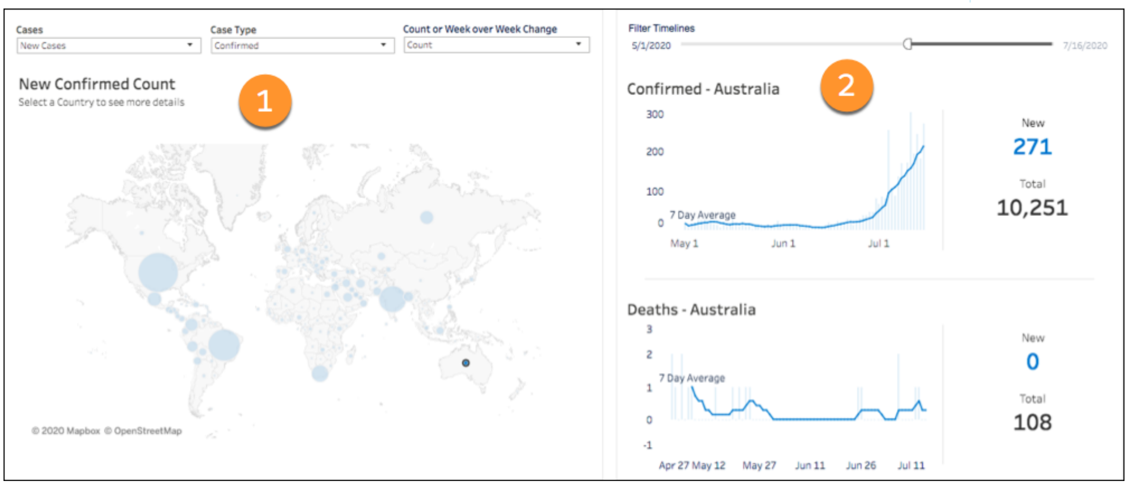
Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

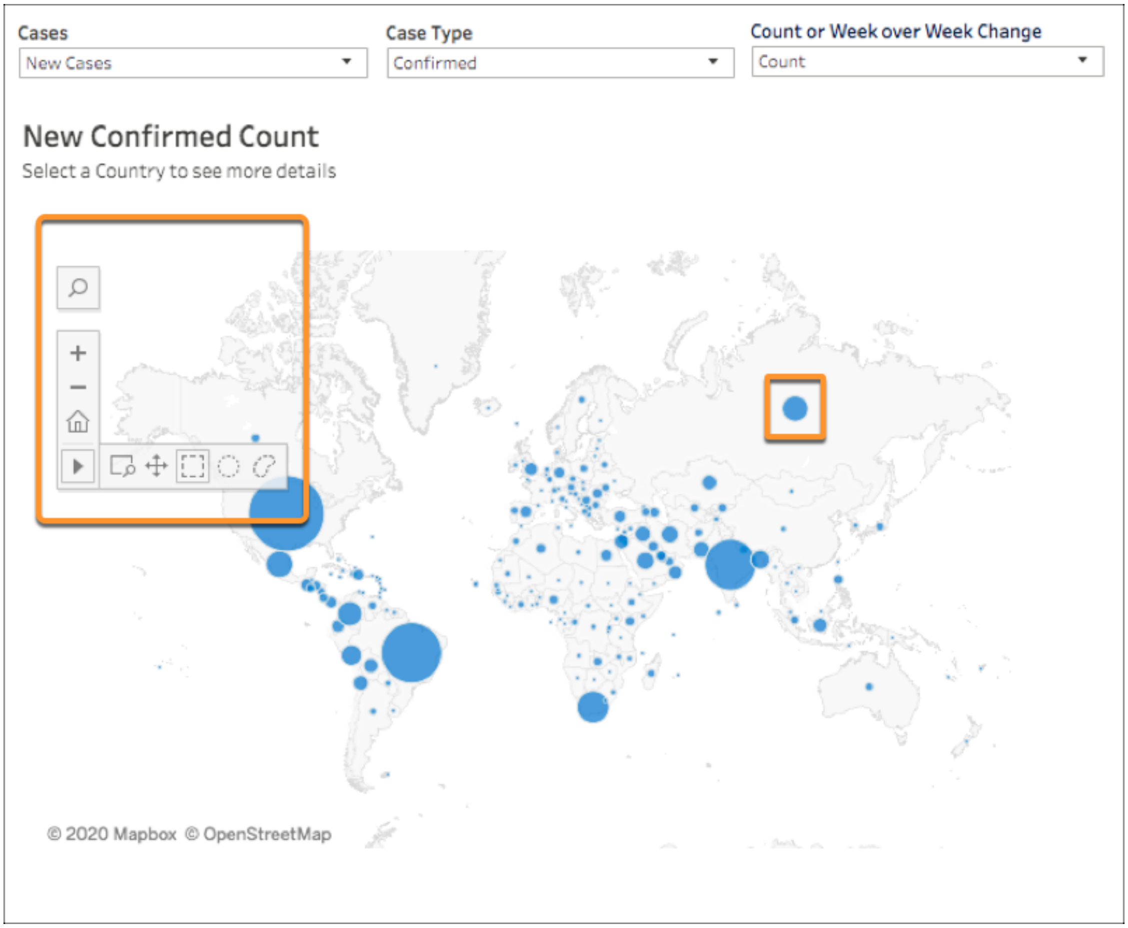
The Workplace Command Center COVID-19 Tracker components show confirmed cases and other metrics from around the world.

Your Salesforce system administrator can add separate Tracker components to show data from the US and worldwide. The map shows geopolitical boundaries (1). The map also shows confirmed data for the region selected in the map. The trend chart shows confirmed data over time for the selected region (2).

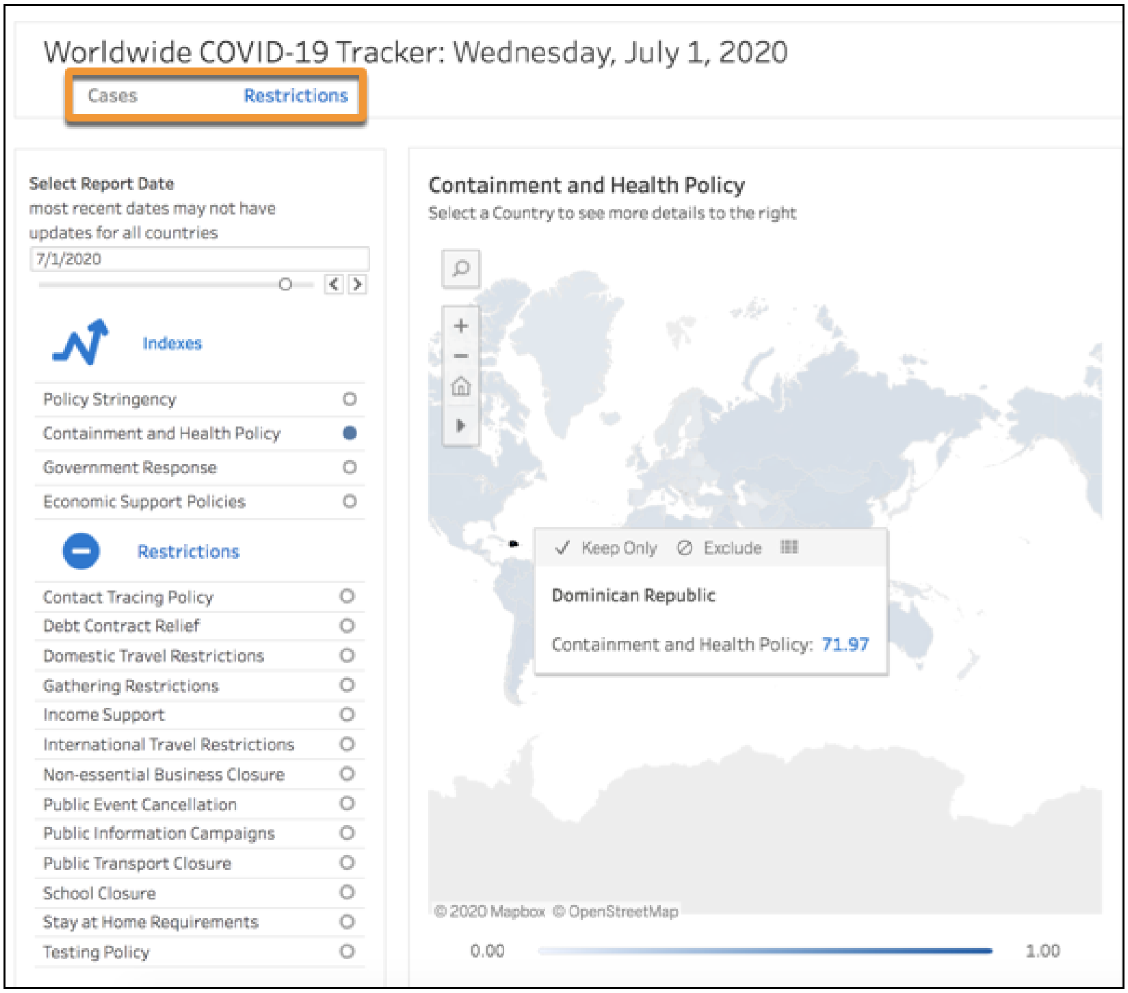


Change the Scope of the COVID-19 Tracker

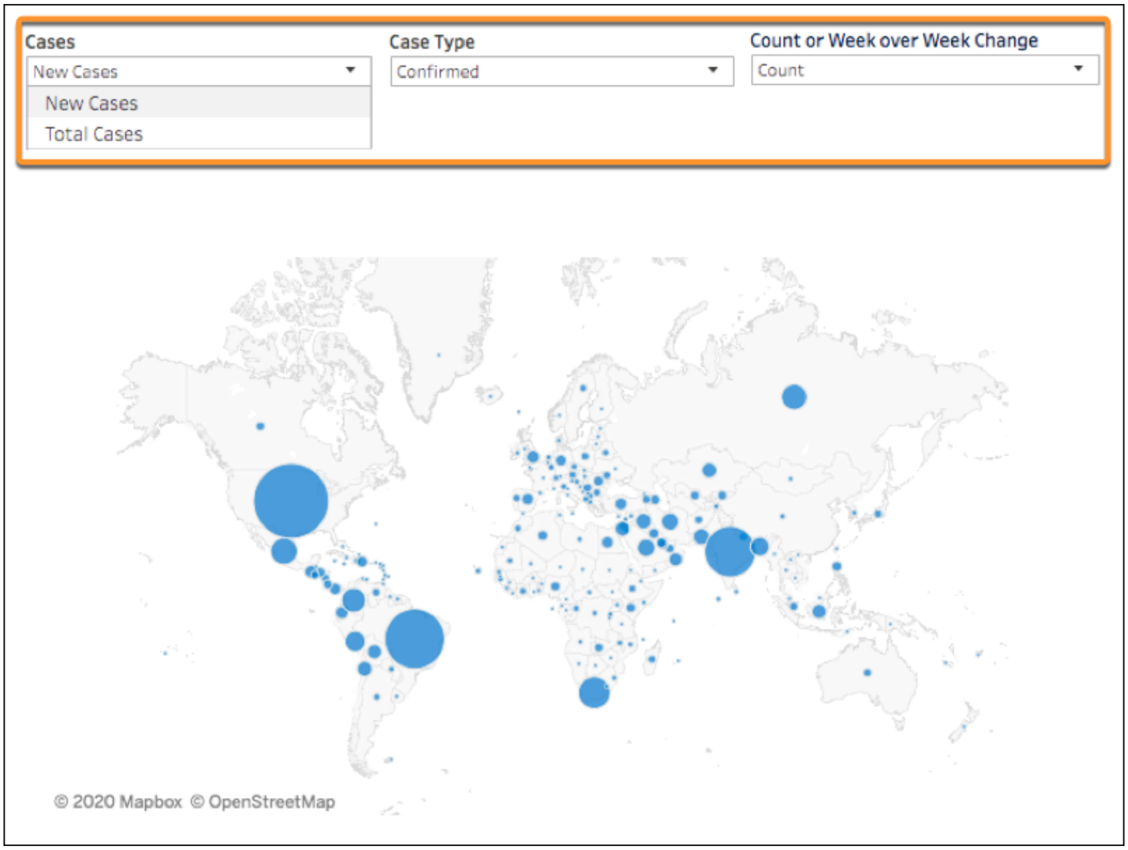
To set the map scope to a country or US state, click any blue marker on the map. To reset the map scope, click the Zoom Home tool or click outside any blue marker. To select rectangular, circular, or irregular map areas, use the expandable selection option in the mini-menu that appears when you hover over the map tools.



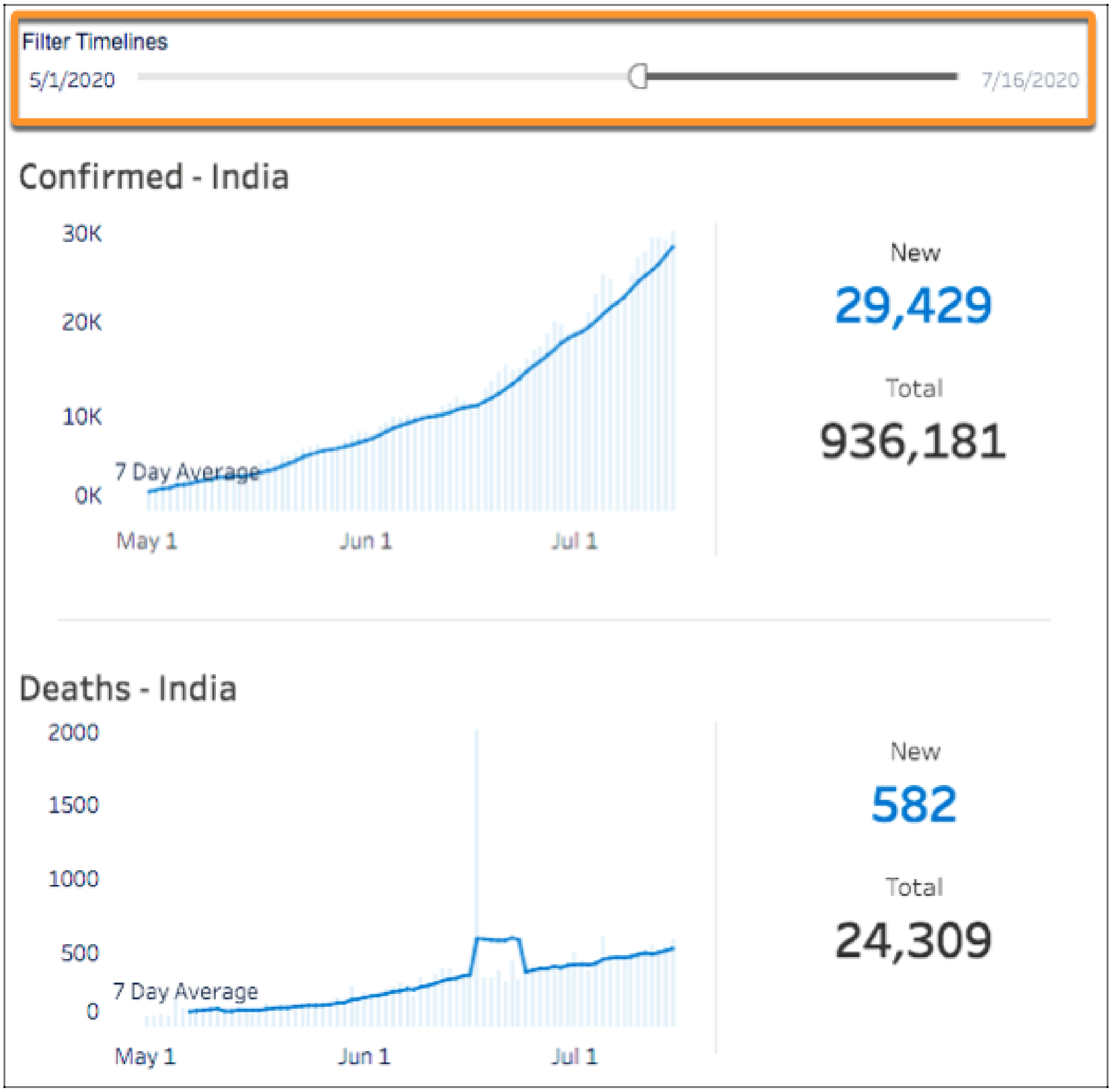
To toggle between case data and related health policy information, click either **Cases** or **Restrictions**.



Use the dropdown menus above the map to filter Cases, Case Type, and Count. In the US COVID-19 Tracker, you can also use a dropdown to change US regional details.



To change the timeframe of the data displayed, use the Filter Timelines slider.



Employee Workspace

Empower your employees to work from anywhere and be productive and engaged. With Employee Workspace, give your employees an integrated experience and enable employee productivity and collaboration. Employee Workspace provides a central hub for tools and resources your employees need to work from anywhere.

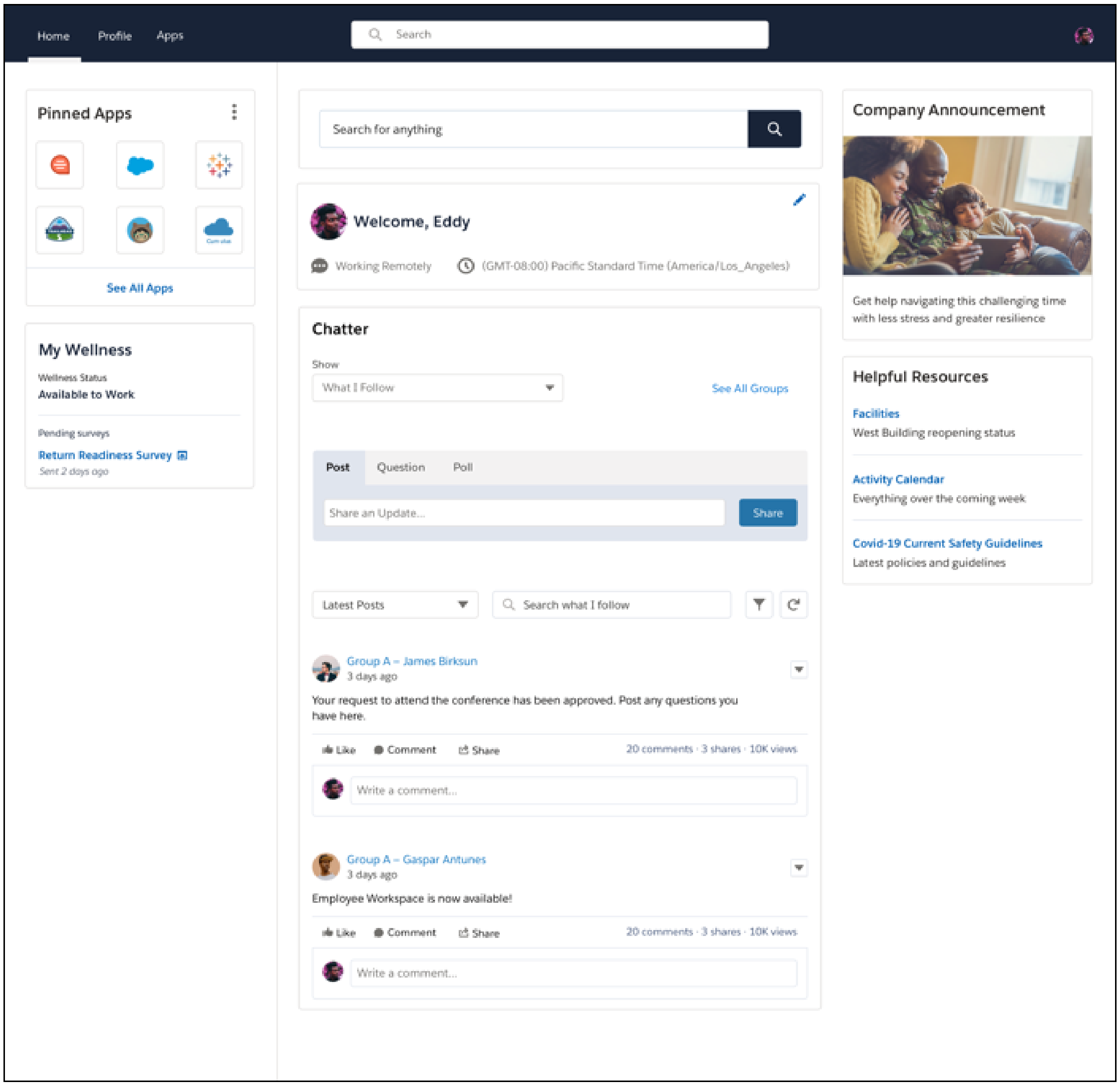
Employees can personalize their home page to view work that's most important and relevant to them. They can access their favorite apps, collaborate with colleagues, receive company communications, review and confirm shifts, respond to latest surveys, and more. Employees can also personalize their profile page to connect with their coworkers and introduce themselves and what they do.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee Workspace requires a Workplace Command Center add-on license, or an Employee Experience add-on license.



Set Up Employee Workspace

Configure general settings and use our installer service to install the package and complete some configuration automatically. Then follow the post-installation steps and import data to finish your setup.

Work From Anywhere With Employee Workspace

Employee Workspace gives you access to all the tools and resources you need to work from anywhere and be productive. You can personalize your workspace to create a single pane of glass to manage your work life. Use Employee Workspace to access apps, stay informed with company news, collaborate with your colleagues, share your work experiences, manage your profile details, and more.

SEE ALSO:

Work.com Developer Guide

Downloadable User Guides

Set Up Employee Workspace

Configure general settings and use our installer service to install the package and complete some configuration automatically. Then follow the post-installation steps and import data to finish your setup.

Make sure to follow the configuration and installation steps in order.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee Workspace requires a Workplace Command Center add-on license, or an Employee Experience add-on license.

Note: Employee Workspace doesn't support employee field visibility rules. Enabling employee field visibility rules can lead to unwanted behavior.

Configure General Settings for Employee Workspace

Before you can install the Employee Workspace package, you must configure these general settings in your org.

Install Employee Workspace

Install the Employee Workspace package. Then return to Salesforce Help to complete setup in your org.

Meet the Employee Workspace Personas

We defined two user personas we expect most organizations need for the Employee Workspace site.

Create and Link Employees and Users

Your org may already have Employee records if you've been using Workplace Command Center. If not, you need to create or import Employee records. Employees who need access to Employee Workspace must have an associated User record to log in to the site and access data. After you add Employee records to your org, use the User lookup field to link Employee and User records.

Customize Employee Workspace

When you install the Employee Workspace package, some of the customizations are automatically completed. Follow these steps to complete the additional manual configuration.

Create Your Branded App for Employee Workspace

Use Mobile Publisher to create and distribute a fully branded version of your Employee Workspace site that looks great on any mobile device. Get your app icon, your name, your colors, and—most importantly—your very own listing in Google Play and Apple App store.

Configure General Settings for Employee Workspace

Before you can install the Employee Workspace package, you must configure these general settings in your org.

Enable Digital Experiences for Employee Workspace

Employee Workspace uses Experience Cloud to collaborate with employees and share information. Even if you already have a Workplace Command Center site, you must create a new Experience Cloud site for your employees.

Brand Your Org

Set up custom brand images and colors in your org using themes. You can choose one of the built-in Salesforce themes, or create your own custom themes with just a few clicks.

Enable Digital Experiences for Employee Workspace

Employee Workspace uses Experience Cloud to collaborate with employees and share information. Even if you already have a Workplace Command Center site, you must create a new Experience Cloud site for your employees.

USER PERMISSIONS

To enable digital experiences:

- Customize Application

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **Digital Experiences** > **Settings**.

   Tip: If you don't see this menu, Digital Experiences might not be available for your Salesforce org. Contact your Salesforce account executive.

2. Select **Enable Digital Experiences**.
3. Enter a domain name for your site, and click **Check Availability** to make sure that it's not already in use.

   We suggest that you use something recognizable to your users, such as your company name.

   Important: You can't change the domain name after you save it.

4. Click **Save**.

SEE ALSO:

Enable Digital Experiences

Brand Your Org

Set up custom brand images and colors in your org using themes. You can choose one of the built-in Salesforce themes, or create your own custom themes with just a few clicks.

Tip: You don't have to brand your org, but it's an easy way to get off to a good start.

1. From Setup, enter `Themes in Quick Find`, and choose **Themes and Branding**.
2. Click **New Theme**.
3. Under Branding, change the image to your organization's logo.
4. Click **Save** and **Activate**.

SEE ALSO:

Brand Your Org in Lightning Experience

Install Employee Workspace

Install the Employee Workspace package. Then return to Salesforce Help to complete setup in your org.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee Workspace requires a Workplace Command Center add-on license, or an Employee Experience add-on license.

Install the Employee Workspace Package

Use the Work.com installer to install and automatically complete some configuration for the Employee Workspace managed package. Then, follow the manual, post-installation steps to complete the setup.

Verify Employee Workspace Installation and Auto-Configuration

See what's customized when installing the Employee Workspace package.

Install the Employee Workspace Package

Use the Work.com installer to install and automatically complete some configuration for the Employee Workspace managed package. Then, follow the manual, post-installation steps to complete the setup.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee Workspace requires a Workplace Command Center add-on license, or an Employee Experience add-on license.

USER PERMISSIONS

To configure installed packages:
- Customize Application

Before installing the packages, complete the required org setup steps listed here: Configure General Settings for Employee Workspace.

Note: Before installing this package, confirm that these Salesforce installer IP addresses aren't within any restricted ranges, or add them to an allowlist:

- 18.214.2.206
- 3.89.46.237
- 52.201.65.75
- 52.2.53.142

You can remove these IP addresses from your allowlist after installation.

1. Navigate to this URL in your browser: https://install.work.com/

   Note: The Salesforce installer service is used only for the installation and initial configuration of the Employee Workspace package.

2. Click **Employee Productivity** then **Employee Workspace**.
3. Click **Install and Configure Employee Workspace**.
4. Click **Log In to Start Pre-Install Validation**.
5. Select your org type. Enter your Salesforce username and password.
6. Click **Allow** to run the pre-installation validation.
7. In the **Connected to Salesforce** box, confirm that you're logged in to the correct org. If the pre-install validation fails, use the error messages in the installer to troubleshoot and complete the pre-installation requirements in your org. When you're ready, return to the installer URL and try again.
8. Review the list of customizations the installer makes in your org.

Steps	Type	
Install Employee Workspace Managed Package	Package	Required
Create Employee Workspace Permission Sets	Other	Required
Assign Permission Set to an Admin User	Other	Required
Configure Sharing Settings on Employee Object for Employee Workspace Users	Metadata	Required

9. Click **Install**. Click **Confirm** to accept the terms of use.

During installation, your user is assigned the Employee Workspace Admin permission set that is needed to configure and manage the org. After a successful installation, follow the prompts throughout the Salesforce Help topics to complete manual post-installation configuration.

Note: Currently, the Salesforce installer service is available only in English.

Verify Employee Workspace Installation and Auto-Configuration

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee Workspace requires a Workplace Command Center add-on license, or an Employee Experience add-on license.

See what's customized when installing the Employee Workspace package.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

Installation step Name	What it Does
Install Employee Workspace Managed Package	Installs the Employee Workspace custom objects and fields. Important: For the Case object, Feed Tracking is enabled by default. You can disable Feed Tracking, but disable it only temporarily. Re-enable Feed Tracking so that it works as expected in Employee Workspace.
Create Employee Workspace Permission Sets	Creates the permission sets to assign admins and employees custom access to objects and data. To use these permissions, you must manually assign users to the permission sets.
Assign Permission Set to an Admin User	Assigns the Employee Workspace Admin permission set to an admin user to complete the installation and configuration, and to manage the org after setup.
Configure Sharing Settings on Employee Object for Employee Workspace Users	Creates recommended default access on the Employee object for the Employee Workspace site users.

SEE ALSO:

Update Your Experience Cloud Site Settings

Meet the Employee Workspace Personas

We defined two user personas we expect most organizations need for the Employee Workspace site.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

Employee Workspace Admin

A Salesforce system administrator. Admins have full access to Employee Workspace data. Can configure a Experience Cloud site and provide access to members.

Note: To limit access to sensitive employee data, Salesforce recommends granting admin privileges only to admins who must know the information.

Employee

A member of the Employee Workspace site. Can view and edit the records they own and can view the records that are shared with them.

When you install the Employee Workspace managed package following our instructions, permission sets for each of these personas are added to your org.

Important: We strongly recommend that you associate each persona with the license, profile, and permission sets as indicated in this table.

Persona	User License	Profile	Permission Set	Permission Set License
Employee Workspace Admin	Salesforce	System Admin	Employee Workspace Admin	Workplace Command Center OR Employee Experience
Employee	Salesforce Platform	Standard Platform User	• Employee Workspace User • Employee Workspace User Data Access	Workplace Command Center OR Employee Experience

Configure Field Access Settings on the Employee Object

If your org was created before February 8, 2021, you must manually set field accessibility on the Employee object for the Standard Platform User profile. The Standard Platform User profile is the profile associated with the Employee Workspace users.

Assign Employee Workspace User Permission Sets

The Employee Workspace User and Employee Workspace User Data Access permission sets are automatically created when you install the package. You must manually assign users to these permission sets.

Add Employee Workspace Admins

An Admin has full access to Employee Workspace data, can create Experience Cloud sites, and provide access to site members. Create system admins only if your organization needs them.

Configure Field Access Settings on the Employee Object

If your org was created before February 8, 2021, you must manually set field accessibility on the Employee object for the Standard Platform User profile. The Standard Platform User profile is the profile associated with the Employee Workspace users.

Important: Skip this step if your org was created after February 8, 2021. The default field level security settings for those newer orgs were updated with the settings outlined on this page. Verify your org settings against the fields listed on this page.

1. From Setup, enter `Field Accessibility` in the Quick Find box, then select **Field Accessibility**.
2. In the list, find and click **Employee**.
3. Click **View By Profiles** and select **Standard Platform User**.
4. For the `Employee Number` field, click Field Access.
5. Under Field-Level Security, select **Read-Only**, and click **Save**.
6. For the `Alternate Email` field, click Field Access.
7. Under Field-Level Security, deselect **Visible** and click **Save**.
8. Repeat step 6 and 7 for these fields:
   - `Date Of Birth`
   - `Gender`
   - `Home Address`
   - `Home Phone`
   - `Middle Name`
   - `Status As Of`
   - `Status End Date`
   - `Wellness Status`
   - `Worker Type`

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee Workspace requires a Workplace Command Center add-on license, or an Employee Experience add-on license.

USER PERMISSIONS

To view field accessibility:
- View Setup and Configuration

To change field accessibility:
- Customize Application

  AND

  Manage Profiles and Permission Sets

SEE ALSO:

What Determines Field Access?

Assign Employee Workspace User Permission Sets

The Employee Workspace User and Employee Workspace User Data Access permission sets are automatically created when you install the package. You must manually assign users to these permission sets.

1. From Setup, enter `Users` in the Quick Find box, then select **Users**.
2. Click **New User**.

   Note: The username must be unique across all Salesforce orgs. The username must be in the format of an email address, for example, jane@salesforce.com. The email for this username doesn't have to function.

3. In the User License field, select **Salesforce Platform**.

USER PERMISSIONS

To assign permission sets:
- "Assign Permission Sets"

To create users:
- "Manage Internal Users"

4. In the Profile field, select the **Standard Platform User** profile.
5. Click **Save**.
6. At the top of the page, click **Permission Set Assignments** > **Edit Assignments**.
7. Select **Employee Workspace User** and **Employee Workspace User Data Access**, and add them to the enabled permission sets.
8. Save your changes.

SEE ALSO:

Manage Users

Create a Permission Set Associated with a Permission Set License

Add Employee Workspace Admins

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

To create users:
- Manage Internal Users

An Admin has full access to Employee Workspace data, can create Experience Cloud sites, and provide access to site members. Create system admins only if your organization needs them.

The admin who installed the Employee Workspace managed package following our recommended process is automatically assigned the Employee Workspace Admin permission set. If your organization requires additional admins, create users and grant permissions manually.

Note: As of the Summer '21 release, the `UserId` field on the Employee object isn't accessible by default. If necessary, edit the field-level security settings for the relevant permission set or profile.

1. From Setup, enter *Users* in the Quick Find box, then select **Users**.
2. Click **New User**.

   Note: The username must be unique across all Salesforce orgs. The username must be in the format of an email address, for example, jane@salesforce.com. The email for this username doesn't have to function.

3. In the User License field, select **Salesforce**.
4. In the Profile field, select the **System Administrator** profile or similar depending on your org's profile settings.
5. Click **Save**.
6. At the top of the page, click **Permission Set Assignments** > **Edit Assignments**.
7. Select **Employee Workspace Admin** and click to add it to the enabled permission sets.
8. Save your changes.

SEE ALSO:

Manage Users

Create a Permission Set Associated with a Permission Set License

Set Field Permissions in Permission Sets and Profiles

Create and Link Employees and Users

Your org may already have Employee records if you've been using Workplace Command Center. If not, you need to create or import Employee records. Employees who need access to Employee Workspace must have an associated User record to log in to the site and access data. After you add Employee records to your org, use the User lookup field to link Employee and User records.

Add Employee Records

The Employee object is a Work.com standard object.

1. From the **App Launcher**, find and select **Employees**.
2. Click **New**.
3. Enter values for each employee. Required fields are:
   - `First Name`
   - `Last Name`
   - `Status As Of`
   - `Email`
   - `Location`
   - `Employee Number`
   - `Worker Type`
   - `Employee Status`
4. Link the employee record to a user record using the `User` lookup field.
5. Click **Save** to finish, or **Save & New** to create another employee record.

SEE ALSO:

Automatically Sync Employee and User Records

Customize Employee Workspace

When you install the Employee Workspace package, some of the customizations are automatically completed. Follow these steps to complete the additional manual configuration.

Considerations for Employee Workspace Customizations
Keep the listed considerations in mind when customizing your Employee Workspace site.

Activate Your Employee Workspace Site
Activate your Experience Cloud site to send out a welcome email to all employees and also to set up SEO for your site.

Add Connected Apps
Add the connected apps that you want to your employees to access from the Employee Workspace site. Connected apps can include authorization to external apps, or basic settings directing an employee to an external site or web-based application.

Publish Your Employee Workspace Site
Publish the Employee Workspace site to make it available to employees.

Employee Workspace Customizations
Access to the Salesforce CMS is automatically enabled during installation. With this access, you can create a CMS Workspace and then customize the news banner, hero component, search component, and navigation bar on the homepage of your Employee Workspace site.

Add Default Apps to the Pinned App Widget
You can choose apps that you expect your employees to use most often and set them as default pinned apps. You can pin up to six apps in the Pinned Apps widget.

Considerations for Employee Workspace Customizations

Keep the listed considerations in mind when customizing your Employee Workspace site.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

Recommendations to Consider before Customizing Your Experience Cloud Site

- Add the components for Wellness and Shift Management only on the Employee Workspace homepage. The Wellness component is available only in orgs that have the Workplace Command Center package. The Shift Management components are available only in orgs that have the Shift Management package.
- Don't enable public access for the Employee Workspace site and ensure that only employees who are members can log in and access the site. See Control Public Access.
- Don't enable the optional feature to show nicknames because an employee can't modify the nickname of the synced user from Employee Workspace. By default, the full name of an employee is displayed in all locations in the site.

Limitations to Consider While Customizing Your Site's Pages

- The submenu items that you add to the navigation menu don't inherit the look and feel of the Employee Workspace site.
- Some fields such as Location and the employee photo for a profile page can't be edited by employees. These values are provided by the synced user account. Admins can edit the fields on the Employee record or the People record in the org hosting the site.
- The fields sets (`Employee Profile Card Secondary Region` and `Employee Profile Card Tertiary Region`) of the Employee object have these limitations:
  - You can edit the field sets to add only custom fields of the Employee and Location objects. The other standard fields that aren't grouped in the defined field set aren't marked as `Available for the Field Set`. And the field set can't be edited to include them.
  - You can't define the fields in the field set as required. The `Required` property on these fields isn't considered.
  - You can't add the `Gender` field to the field sets.

Activate Your Employee Workspace Site

Activate your Experience Cloud site to send out a welcome email to all employees and also to set up SEO for your site.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

To send a welcome email with the login information to members:

1. In Workspaces, click **Administration Emails**.
2. In Email Templates, select **Send welcome email**.
3. Click **Save**.

To activate the Employee Workspace site:

1. From Setup, enter *`All Sites`* in the Quick Find box, select **All Sites**.
2. Click **Workspaces** next to the Employee Workspace site.
3. In Workspaces, click **Administration Settings**.
4. Click **Activate**, and click **OK**.

You receive an email when the site is activated.

Add Connected Apps

Add the connected apps that you want to your employees to access from the Employee Workspace site. Connected apps can include authorization to external apps, or basic settings directing an employee to an external site or web-based application.

- Create a connected app: Connected Apps
- Define start URL settings: Manage Start URL Settings for a Connected App
- Configure access to the connected app: Assign it to the **Standard Platform User** profile or **Employee Workspace User** permission set. See Manage Access to a Connected App

Publish Your Employee Workspace Site

Publish the Employee Workspace site to make it available to employees.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

Before going live, you can preview your Experience Cloud site to see how it looks in a desktop browser window or on a mobile device.

1. From Setup, enter `Sites` in the Quick Find box, then select **All Sites**.
2. Select **Builder** next to the Employee Workspace community.
3. In the browser window, click **Preview** on the toolbar.
4. To preview the community on different devices (Mobile, Tablet, or Desktop), use the options in the menu.

When you're happy with the changes, publish your site. When you publish a site, all changes made to the site since the last time it was published are included.

1. From Setup, enter `Sites` in the Quick Find box, then select **All Sites**.
2. Select **Builder** next to the Employee Workspace site.
3. In the browser window, click **Publish** on the toolbar.

An email notification informs you when your changes go live.

SEE ALSO:

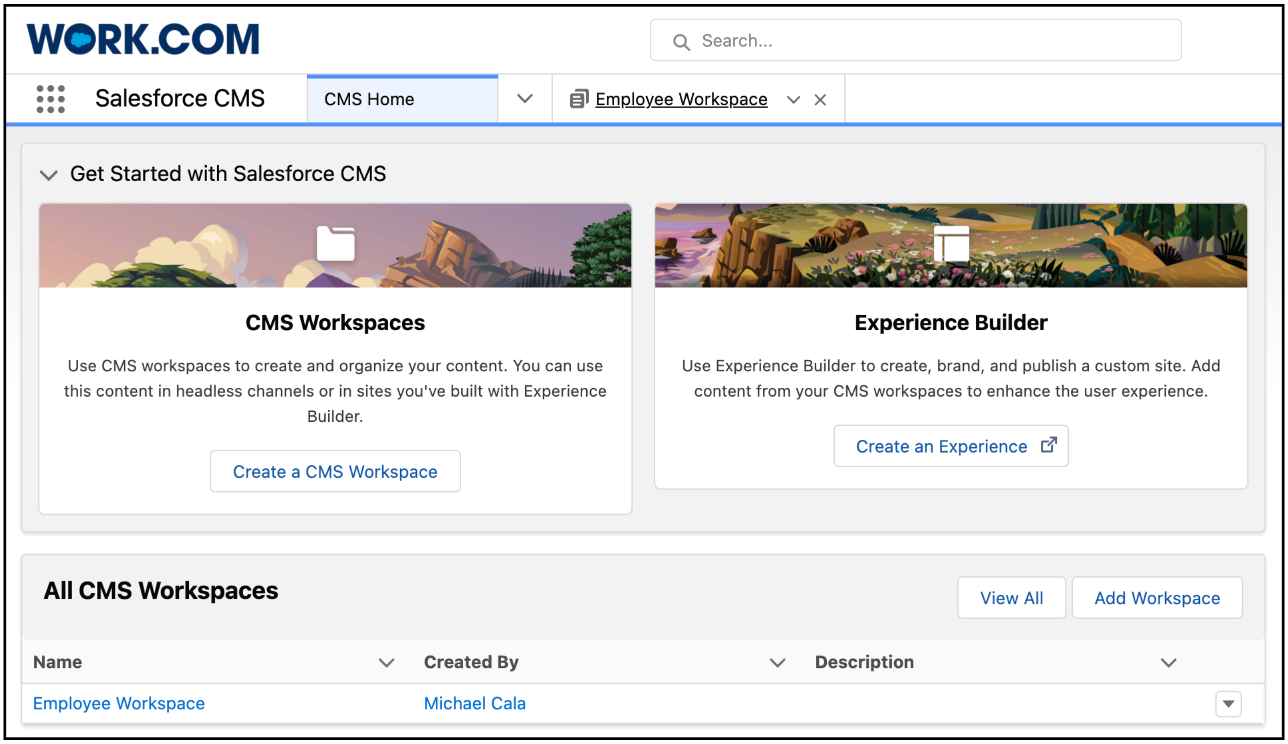
Customize Sites with Experience Builder

Employee Workspace Customizations

Access to the Salesforce CMS is automatically enabled during installation. With this access, you can create a CMS Workspace and then customize the news banner, hero component, search component, and navigation bar on the homepage of your Employee Workspace site.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

1. Create a CMS Workspace:
   a. From the Salesforce App Launcher, launch the Digital Experiences app.
      The Digital Experiences Home tab opens.



b. Click **Create a CMS Workspace** then enter a name and description.

c. Select your Employee Workspace Community site as a channel that uses the content.

d. Permission users and groups to create and manage content in the workspace.

Note: You can choose not to select any users or groups. If so, only the admins can contribute and manage content.

e. Set the Contributor Role as Content Admin or Content Manager.

- **Content Admin**
  Has access to all content in the CMS workspace and can manage contributors and content sharing.

- **Content Manager**
  Has access to all content in the CMS workspace.

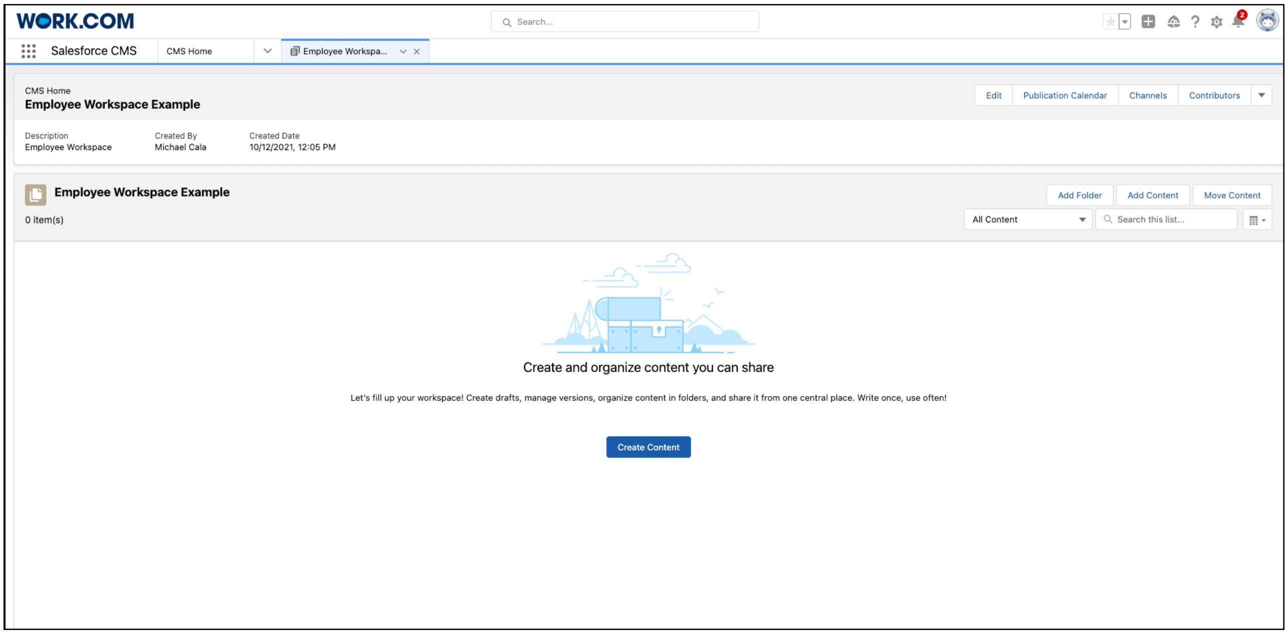
f. Set the default language.

g. Review the information, and then click **Done**.

2. Create CMS Content:

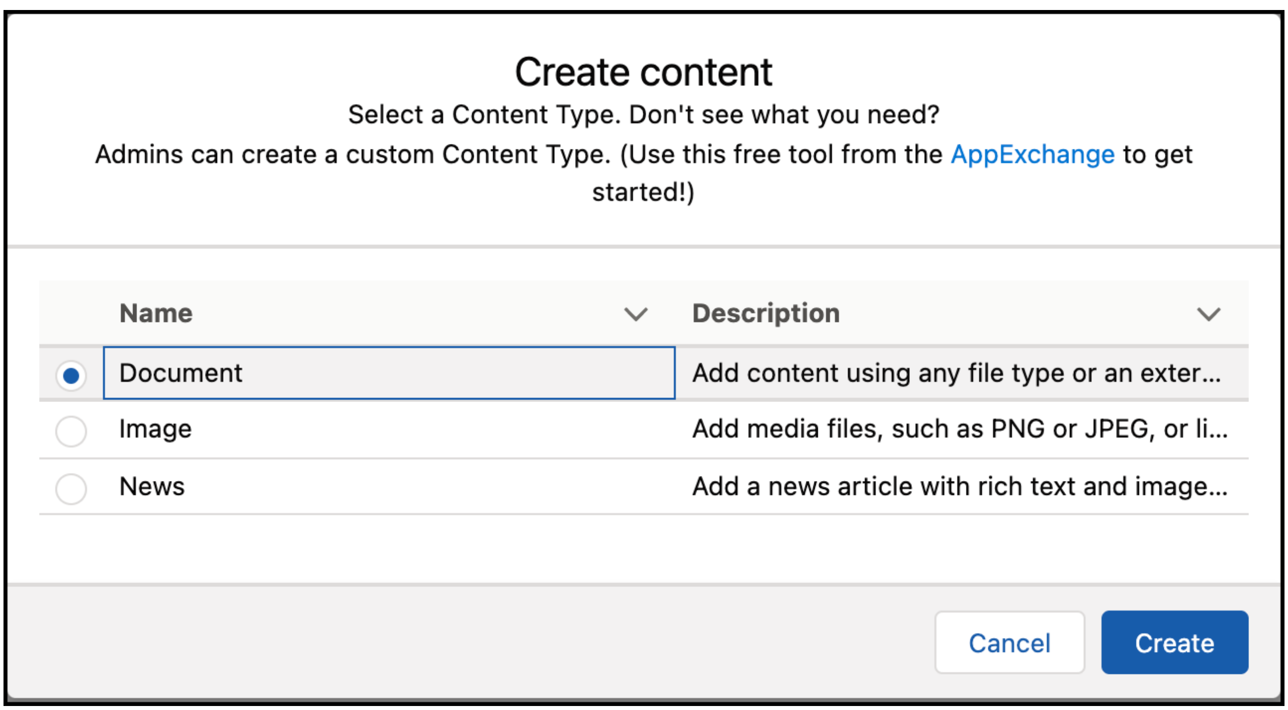
a. From the CMS app Home tab, select a workspace from the All CMS Workspaces menu.

The Employee Workspace settings tab opens.



b. Click **Create Content**.
   The Create Content window opens.

c. Select a content type, and then click **Create**.



d. In the Create Tab, enter content in the required fields, and then click **Save Draft**.

e. Click **Publish**.

f. Save the unique identifier for the content that you created.

   The unique identifier is in the web page URL starting with 20Y.

   `20Y5f000000tb2xEAA`

Next, customize your Employee Workspace site beginning with the news banner.

1. Customize the News Banner

   Deliver headline news to your employees within their Employee Workspace homepage. Create content for your Employee News Banner, and then add it to your Employee Workspace site.

2. Customize the Hero Component

   Customize the hero component layout for your Employee Workspace site. The hero component consists of a search box, background image, and title text on the Employee Workspace home page.

3. Add Search to Your Employee Workspace Page

   You can add a global search box anywhere on the Employee Workspace page by using the search box component.

4. Customize the Navigation Bar

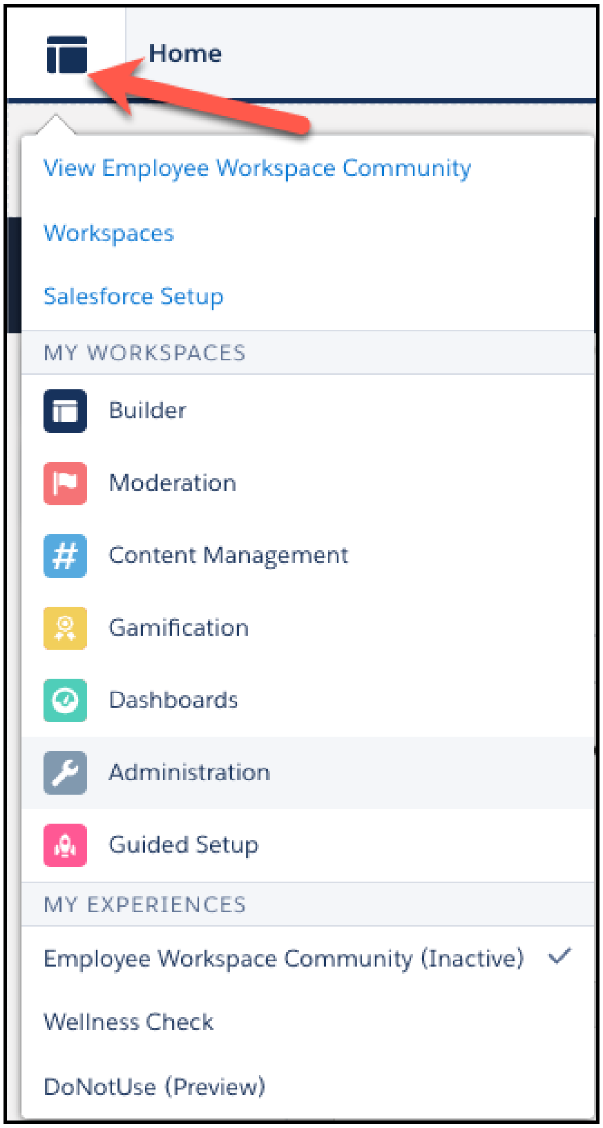
   You can customize the look of your Employee Workspace site's navigation bar to fit your brand.

Customize the News Banner

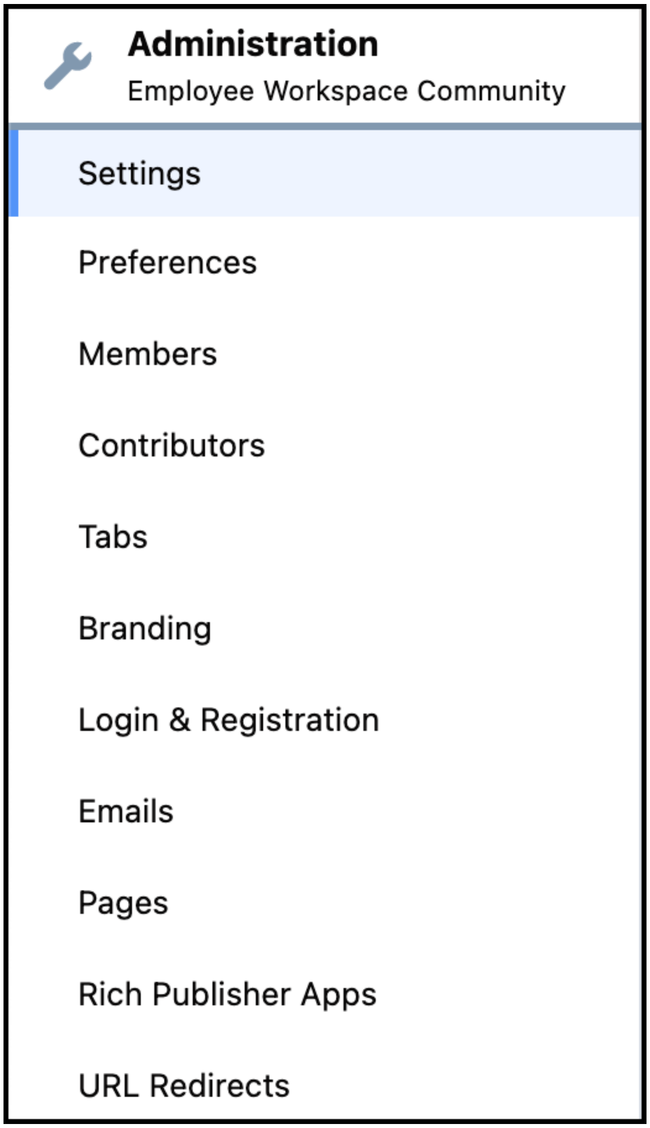
Deliver headline news to your employees within their Employee Workspace homepage. Create content for your Employee News Banner, and then add it to your Employee Workspace site.

Before you begin, deactivate your Employee Workspace Community in the Employee Workspace Administration Settings.

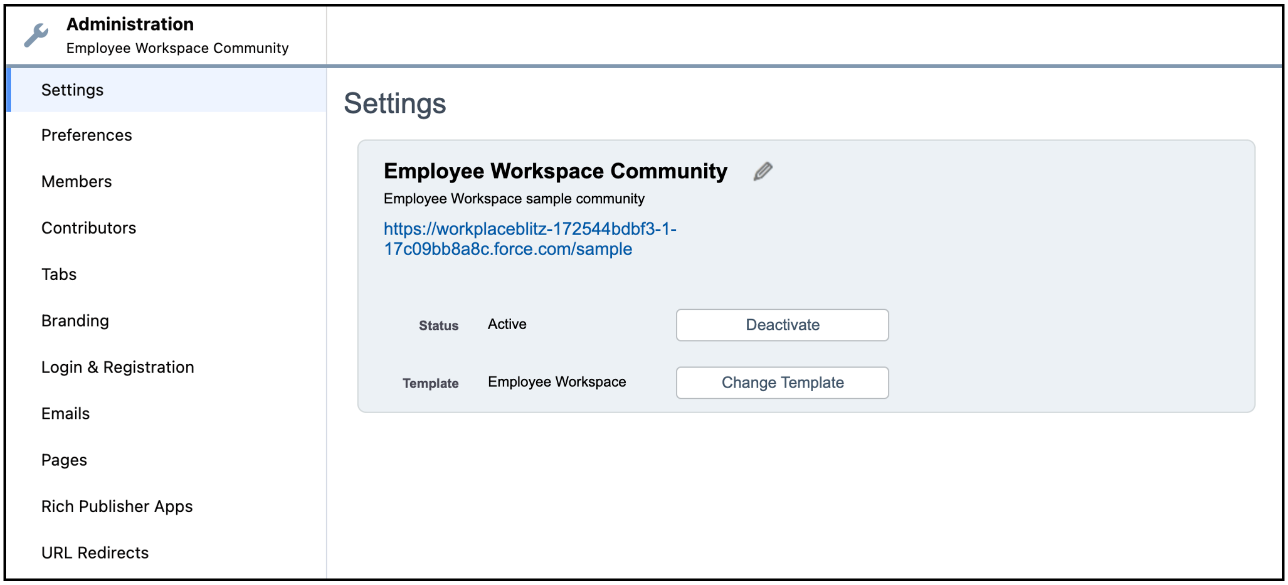
1. Click Experience Builder settings.



2. Select **Administration**.
3. In the Administration menu, select **Settings**.

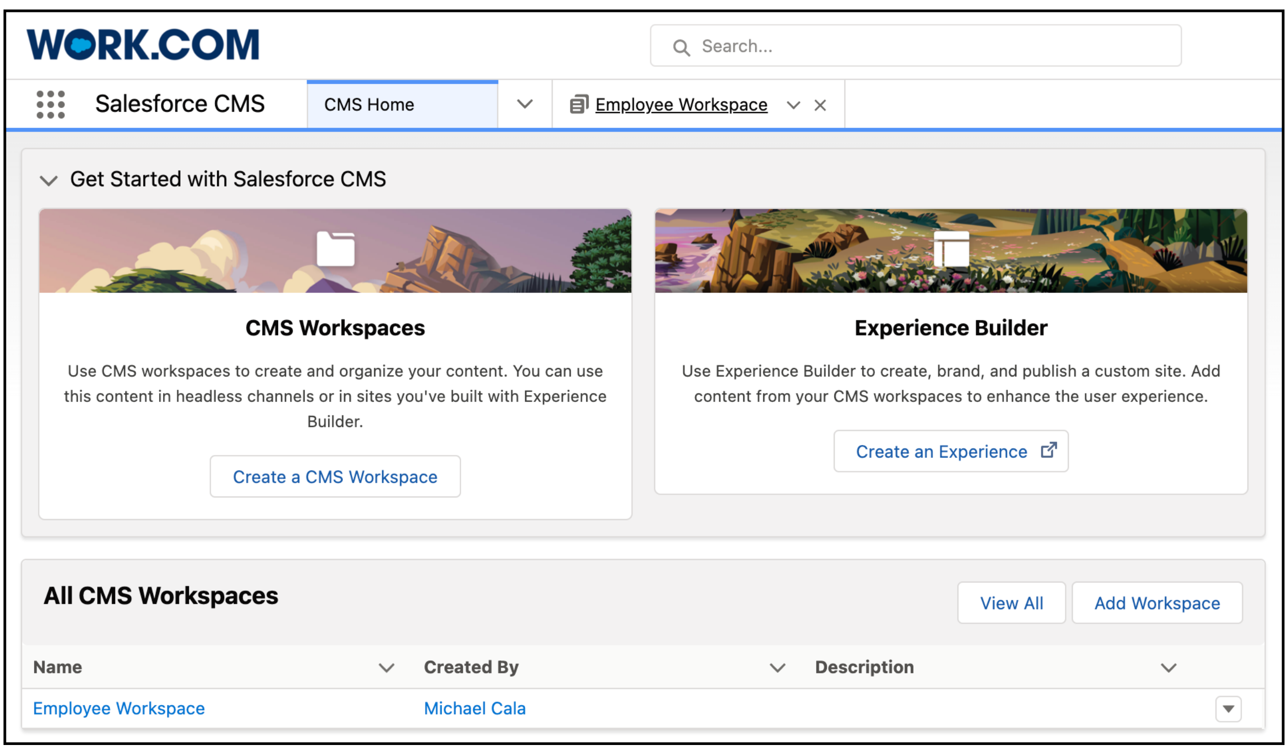


4. In the settings menu, click **Deactivate**.



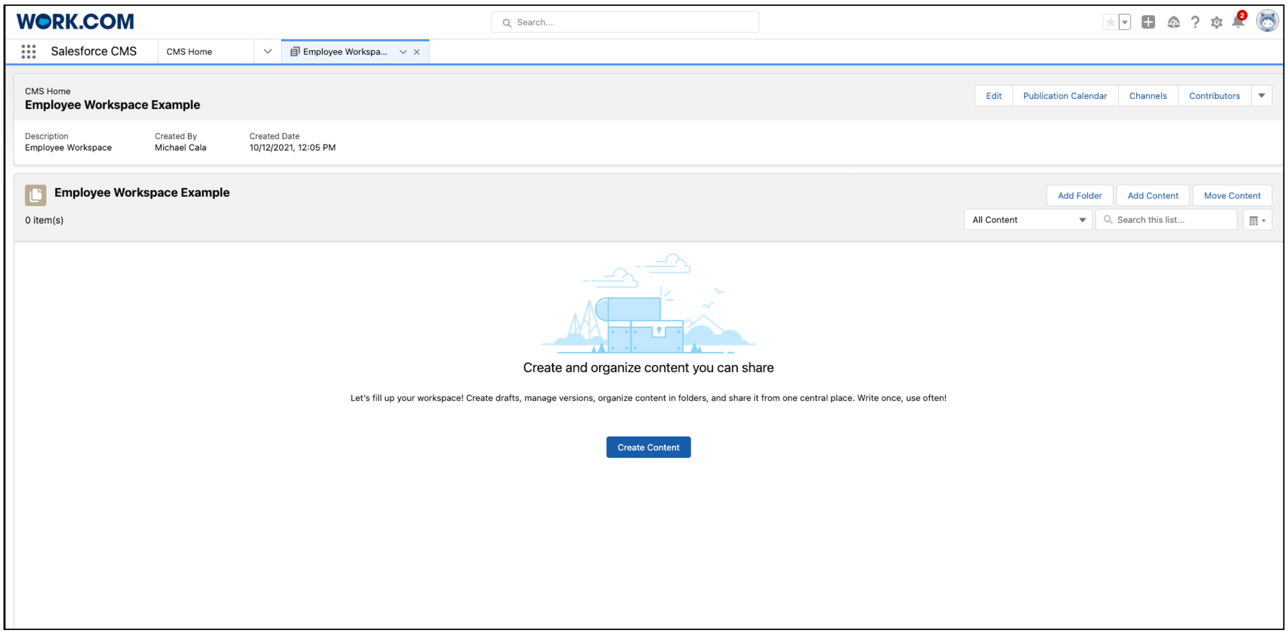
To customize your news banner, follow these steps. If you already created news banner content from the Employee Workspace Customizations on page 92 Help topic, proceed to step two.

1. Create news banner content.
   a. From the Salesforce App Launcher, launch the Digital Experiences app.
      The Digital Experiences Home tab opens.



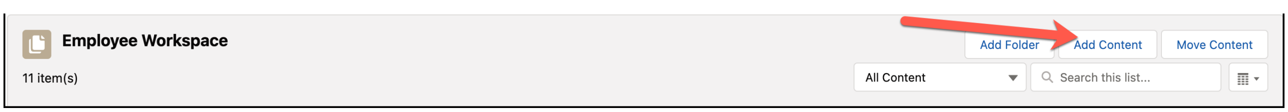
   b. From the All CMS Workspaces menu, select a workspace.

The Employee Workspace settings tab opens.



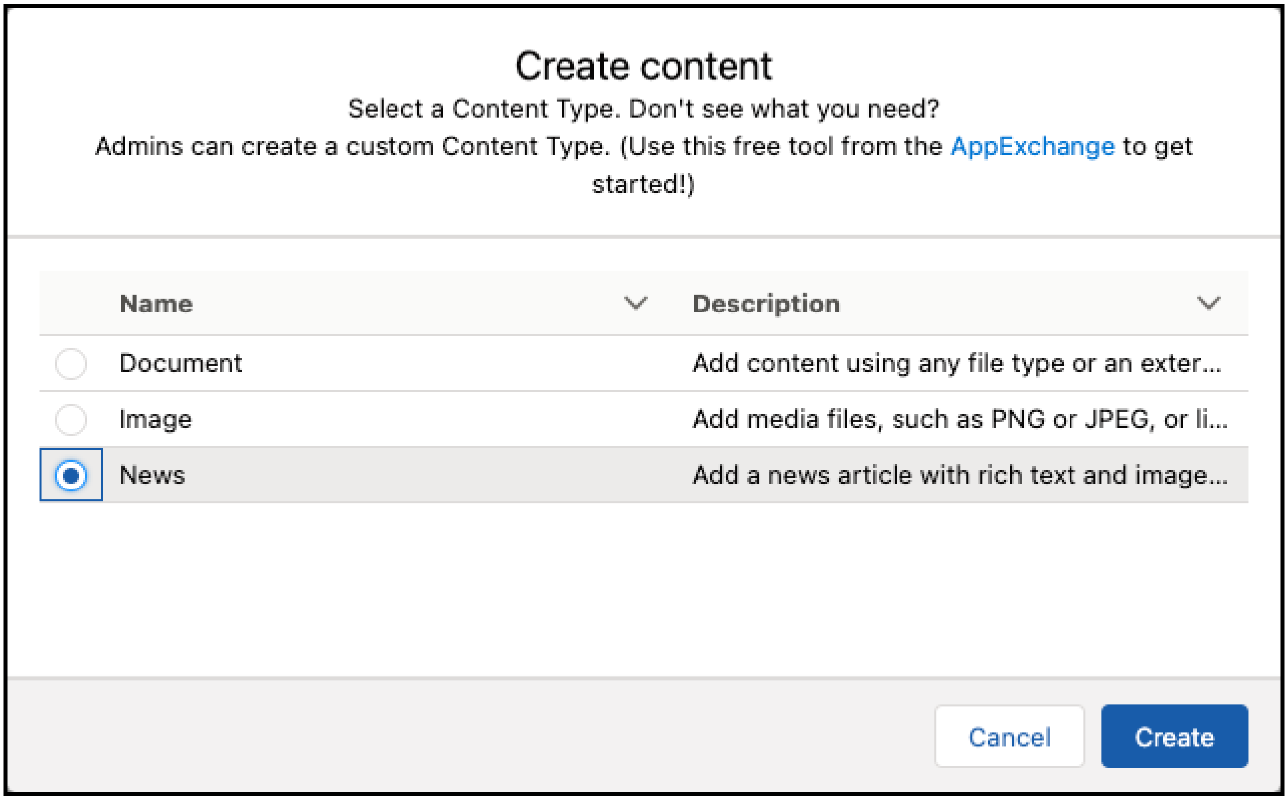
c. Click **Add Content**.

Or if you haven't created CMS content, click **Create Content**.



The Create Content window opens.

d. Select **News** as the content type, and then click **Create**.



e. In the Create tab, enter the required information in the text fields, and then click **Save Draft**.

f. Click **Publish**.

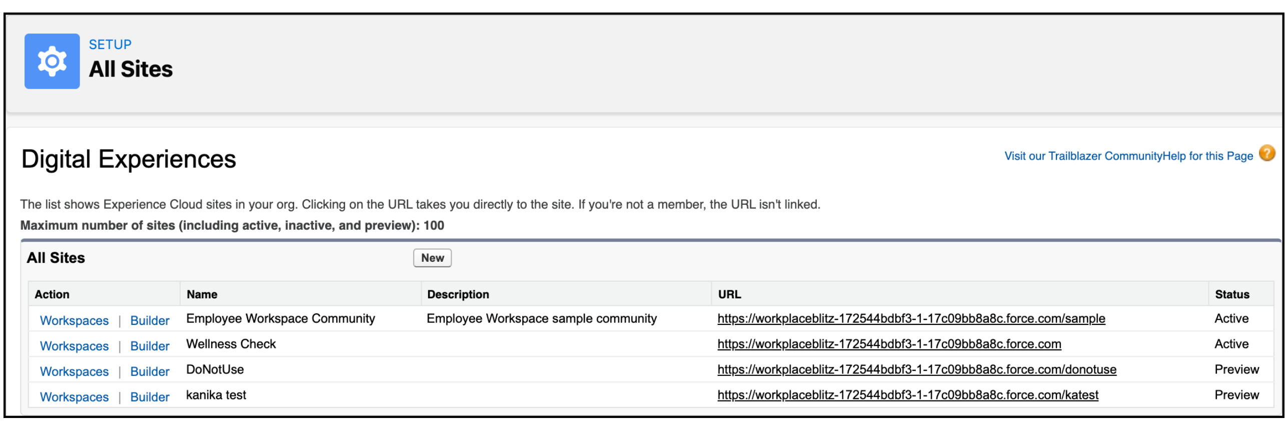
g. Save the unique identifier for the news content that you created.

   The unique identifier is in the web page URL starting with 20Y.

   `20Y5f000000tb2xEAA`

2. Add your news content to your Employee Workspace site banner.

   a. From Setup, in the Quick Find box, enter `Sites`, and then select **All Sites**.
   The All Sites setup menu opens.



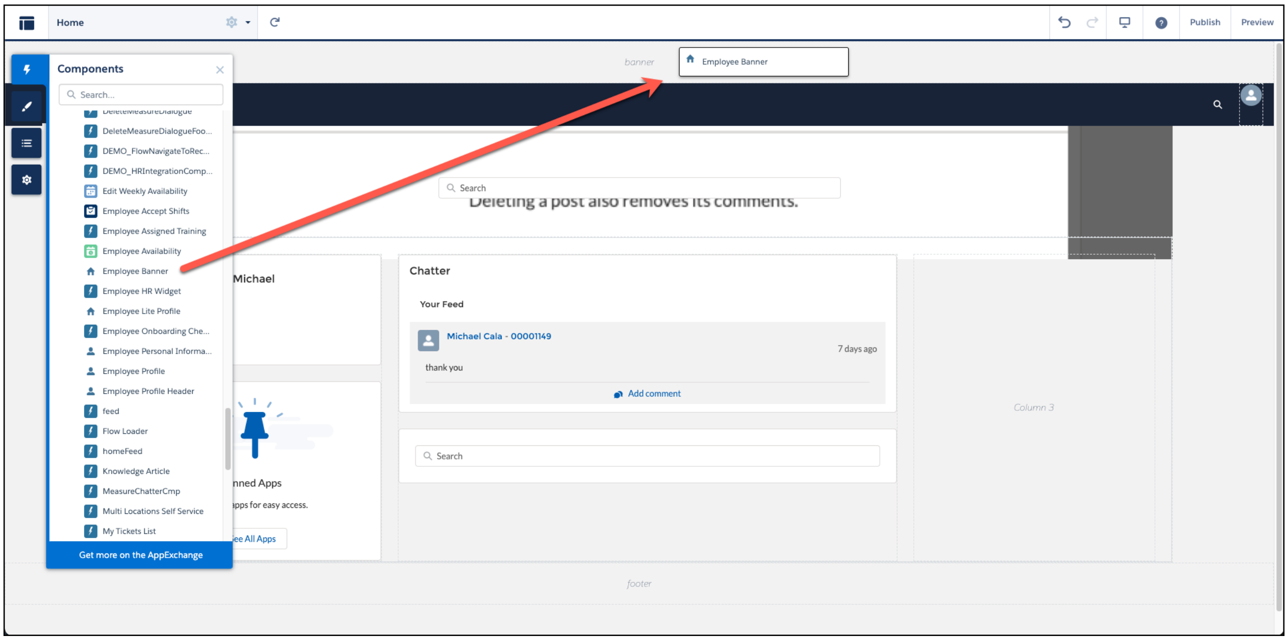
   b. Click **Builder** next to Employee Workspace Community.

The Experience Builder opens.

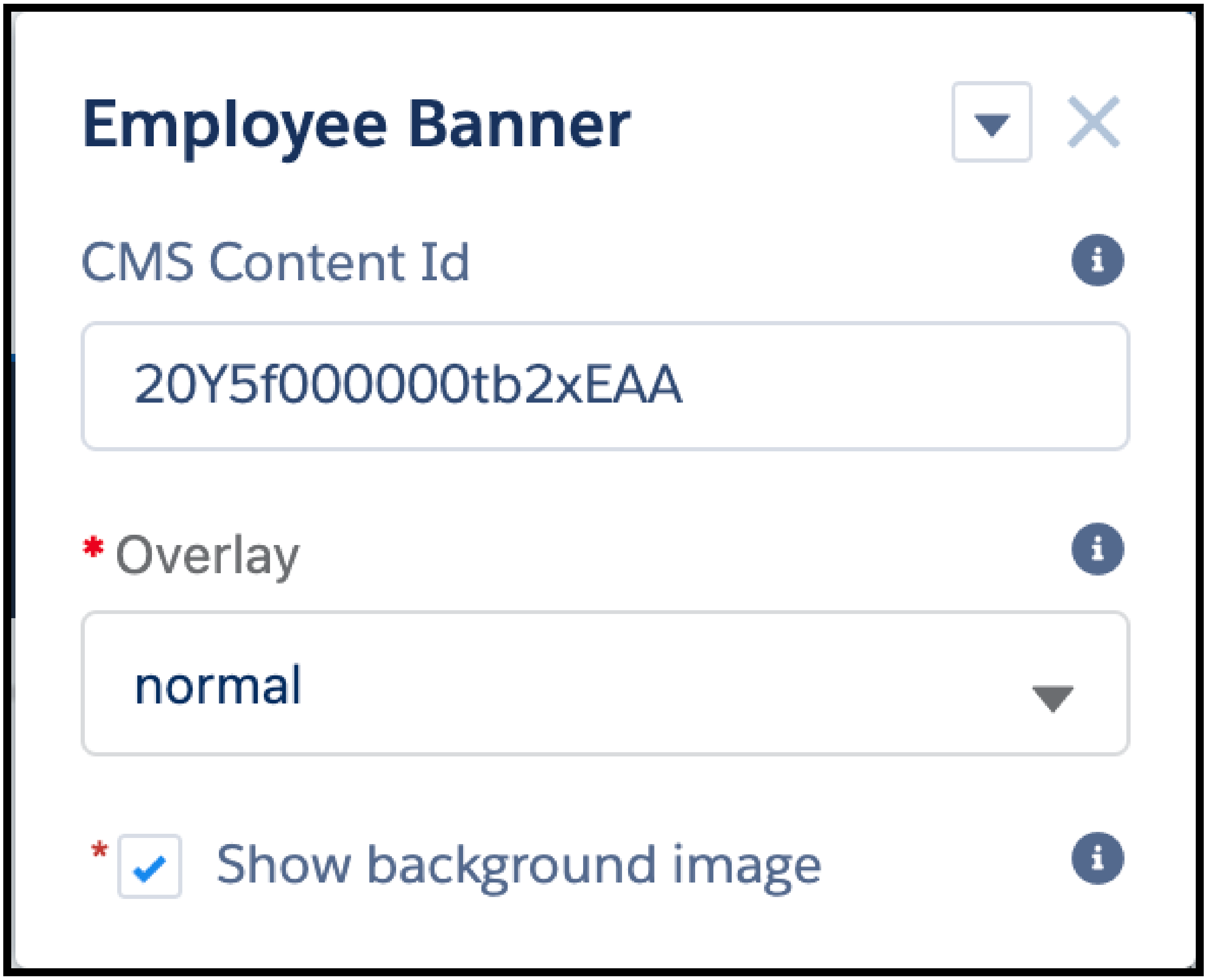
c. Click

.

d. In Components, under Custom Components, select **Employee Banner** and place it in the banner field of the Experience Builder.



e. From the banner field, click **Employee Banner**.
The Employee Banner settings window opens.



f. Set the CMS Content ID to the news content that you created.
   For example: `20Y5f000000tb2xEAA`

g. To show news content in the banner field, publish your Employee Workspace site.

Next, reactivate your Employee Workspace Community, and then customize your hero component.

SEE ALSO:

Salesforce CMS

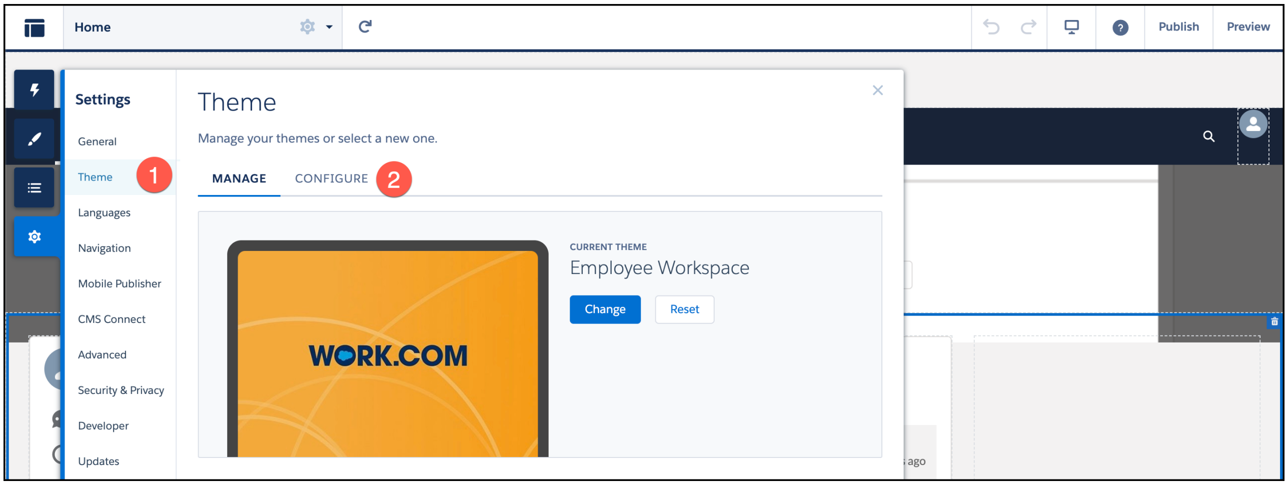
Customize the Hero Component

Customize the hero component layout for your Employee Workspace site. The hero component consists of a search box, background image, and title text on the Employee Workspace home page.

The hero component is the key visual element on a page that focuses your users' attention. The background image and title text are enabled by default. You can customize the default image, but not the title text. To customize the default hero image and disable the hero title text, follow these steps.

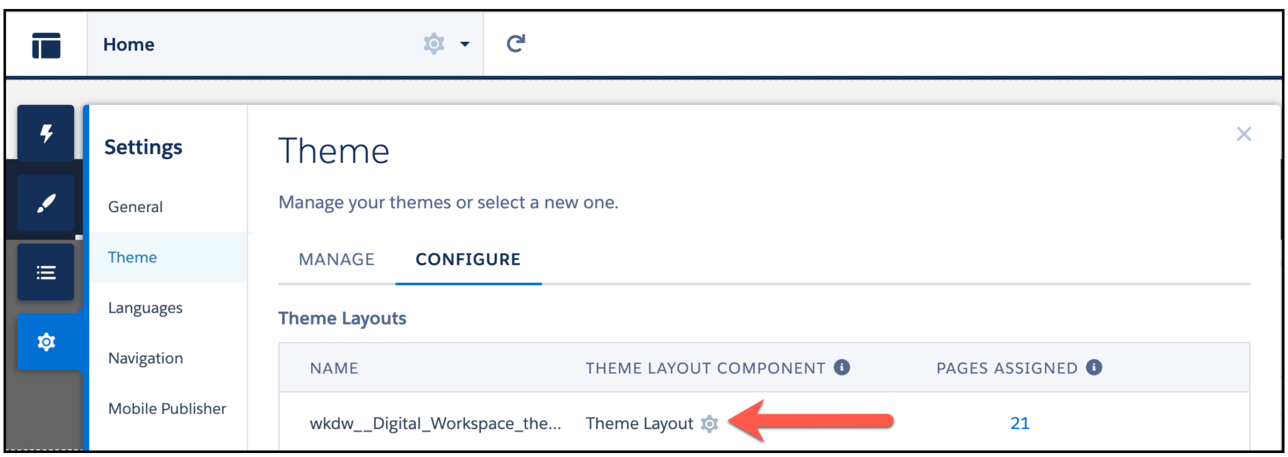
Tip: You also can disable both components or you can keep the title text and disable the default image.

1. In the Experience Builder, click on the left sidebar.
   The Settings panel opens.
2. Select **Theme**, and then select **Configure**.



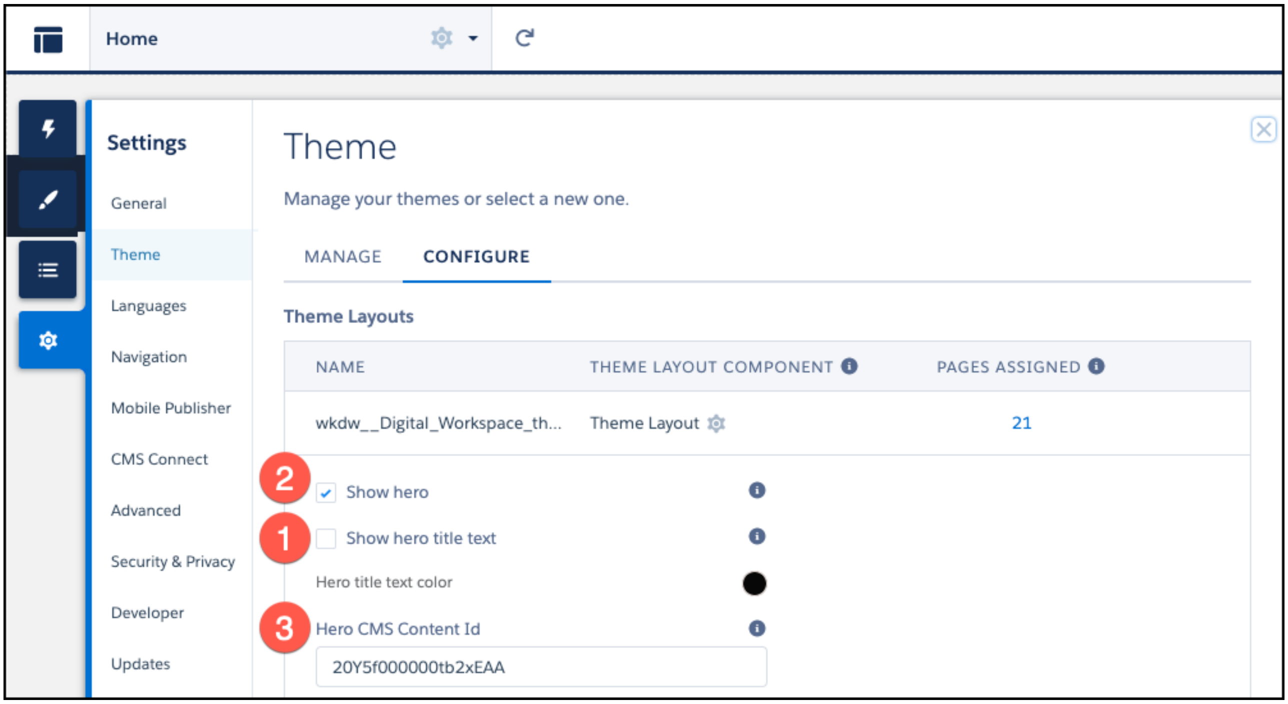
   The Theme Layout settings menu opens.

3. Under Theme Layout Component, click next to Theme Layout.



   The Theme Layout settings drop down menu opens.

4. Configure the hero component settings.
   a. Deselect **Show hero title text**.
   b. Ensure **Show hero** is selected.
   c. Enter a Hero CMS Content Id



Your hero configurations update dynamically in the Experience Builder.

Next, customize your search box component.

SEE ALSO:

Customize Sites with Experience Builder

Add Search to Your Employee Workspace Page

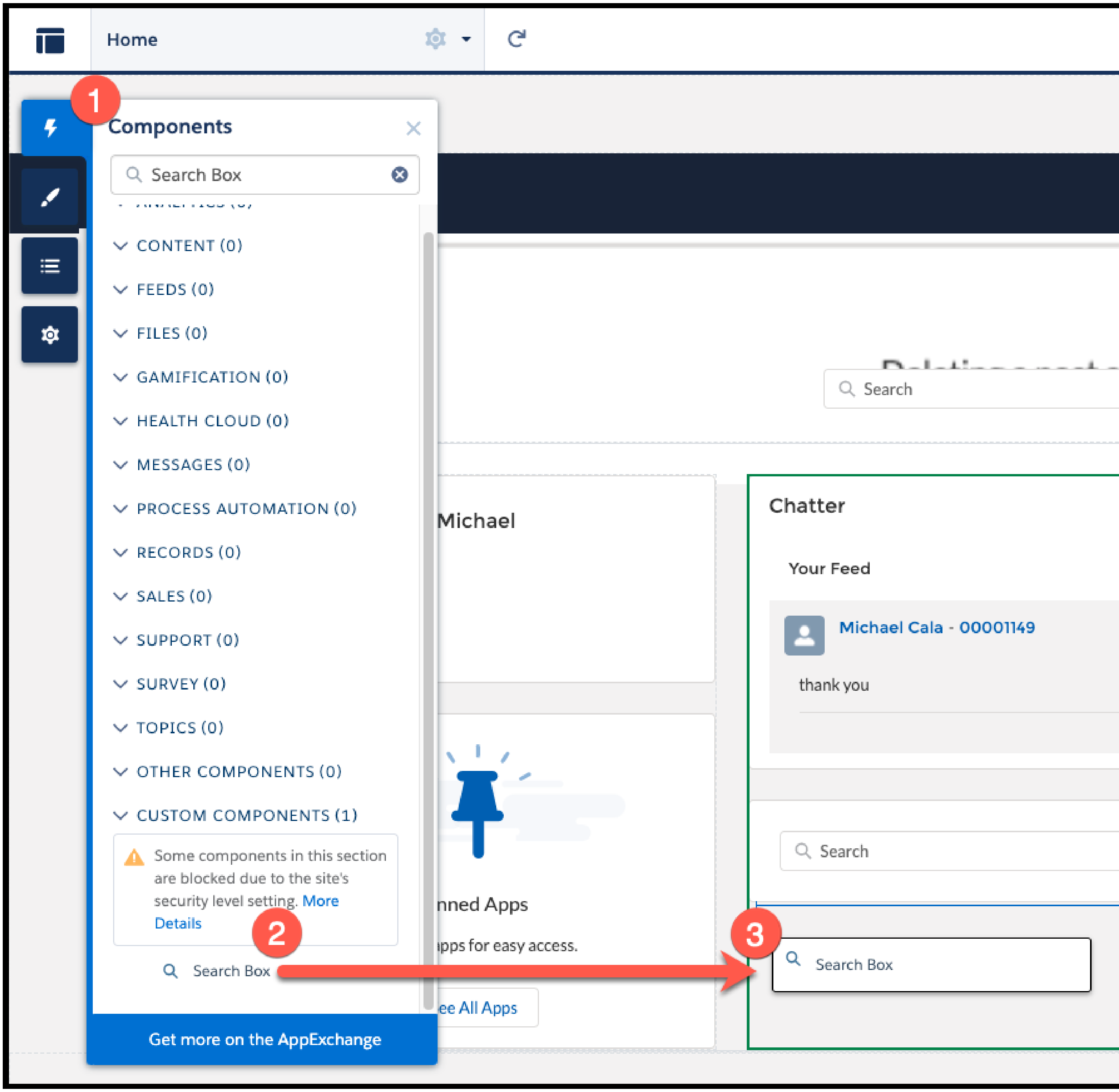
You can add a global search box anywhere on the Employee Workspace page by using the search box component.

Employee Workspace contains a search component at the top of the home page by default. To add additional search components, take these steps.

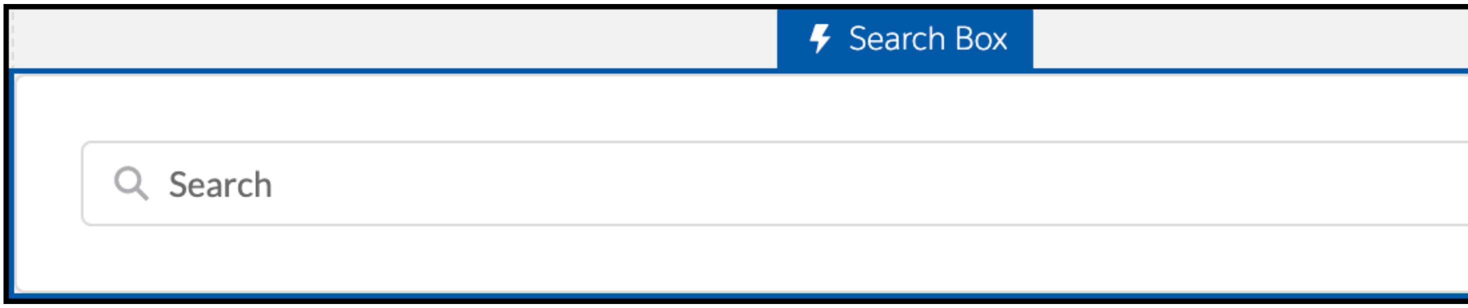
1. In the Experience Builder, click

   on the left sidebar.
2. In Components, under Custom Components, select **Search Box** and place it where you want it on the page.



The search box embeds into the Employee Workspace homepage.



Next, customize your navigation bar.

SEE ALSO:

Salesforce CMS

Customize the Navigation Bar

You can customize the look of your Employee Workspace site's navigation bar to fit your brand.

To customize the navigation bar:

1. In the Experience Builder, click on the left sidebar, then click **Theme**.
2. Click **Configure**.
3. Click next to the Theme Layout.
4. Customize the navigation bar.

For desktops, you can customize the navigation bar's background color, the color of links on the navigation bar, and the hover color for links.

For mobile, you can customize the color of the navigation bar, the color of navigation items, and the color of the active navigation item. If you add more than five items to the navigation bar, the first four appear on the navigation bar, along with an overflow menu containing the other navigation items.

Add Default Apps to the Pinned App Widget

You can choose apps that you expect your employees to use most often and set them as default pinned apps. You can pin up to six apps in the Pinned Apps widget.

To get the connected app IDs:

1. From Setup, enter *`Connected Apps`* in the Quick Find box, then select **Manage Connected Apps**.
2. Find and click the connected app you want to set as a default pinned app.
3. In the browser address bar, locate the `</connectedAppId.….>` portion of the URL.

   Example URL format: `https://<Salesforce base url>/lightning/setup/ConnectedApplication/page?[...]connectedAppId%3D`**`0H4R00000004isIKAQ`**`%26[...]`
4. Copy the connected app ID. In the URL, app ID is between `connectedAppId%3D` and `%26`, and starts with **`0H4`**.

To set default pinned apps:

1. From Setup, enter *`custom settings`* in the Quick Find box, then select **Custom Settings**.

2. Find and click **Employee Workspace settings** and click **Manage**.
3. Click **New**.
4. In **Pinned Apps**, paste a comma-separated list of app IDs.
5. Click **Save**.

Note: To review limits on custom settings, see Custom Settings Limits and Considerations.

Create Your Branded App for Employee Workspace

Use Mobile Publisher to create and distribute a fully branded version of your Employee Workspace site that looks great on any mobile device. Get your app icon, your name, your colors, and—most importantly—your very own listing in Google Play and Apple App store.

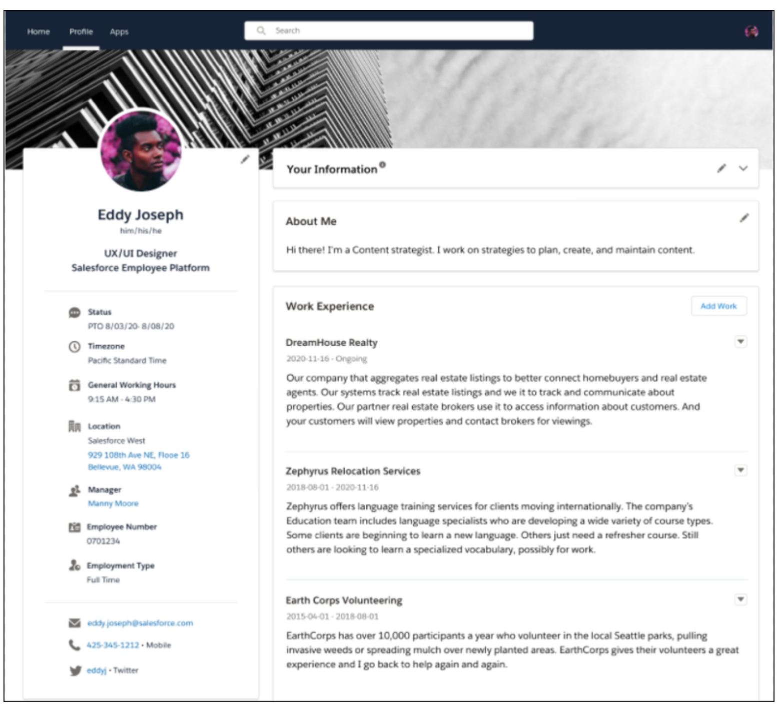
Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

Note: Your organization must license Salesforce Mobile Publisher in order to use the feature. Contact your Salesforce sales rep for more information.

To learn everything from how the Mobile Publisher program works from start to finish to what assets you need to create your branded app, see Mobile Publisher for Experience Cloud.

Work From Anywhere With Employee Workspace

Employee Workspace gives you access to all the tools and resources you need to work from anywhere and be productive. You can personalize your workspace to create a single pane of glass to manage your work life. Use Employee Workspace to access apps, stay informed with company news, collaborate with your colleagues, share your work experiences, manage your profile details, and more.



Log in to Employee Workspace

Log in to the Employee Workspace site from any device, from a desktop or from your mobile devices.

Get Started with Employee Workspace

Employee Workspace creates a home for you when you log in to your org. You can access all available apps, collaborate with your team, receive company communications, all from one place.

Manage Your Profile

Virtual collaboration is the new way to connect and communicate. Keep your profile up to date and let your colleagues know who you are and what you do.

Access Apps You Need to be Productive

Get access to all the apps available to you from one place and without having to log in again.

Find Answers and Solve Issues with Employee Concierge

If your organization has added Employee Concierge to your Employee Workspace site, search your Employee Workspace to find knowledge articles on a range of topics. If you can't find the information you need, open a ticket to request help from a support agent.

SEE ALSO:

Downloadable User Guides

Log in to Employee Workspace

Log in to the Employee Workspace site from any device, from a desktop or from your mobile devices.

You receive a welcome email when your system admin makes you a member of the Employee Workspace site. Use the link and login credentials in the email to get started with Employee Workspace. You can use the same link to log in and access Employee Workspace from any device. You can also launch **Employee Workspace** app from the App Launcher.

If your system administrator created a mobile app for the Employee Workspace site, ask for the app distribution details.

Get Started with Employee Workspace

Employee Workspace creates a home for you when you log in to your org. You can access all available apps, collaborate with your team, receive company communications, all from one place.

Collaborate With Your Peers

Connect with people and share business information securely in real time using Chatter, right from the Employee Workspace homepage.

Take Your Wellness Survey

If your admin installed the My Wellness component, you can verify your current wellness status and take any pending surveys from the Employee Workspace homepage. Otherwise, this option may not be available.

Manage Your Workplace Shifts

If your admin installed the components to manage workplace shift schedule, you can find shifts, confirm your availability, and view your on-site arrival pass from the Employee Workspace homepage. Otherwise, this option may not be available.

Collaborate With Your Peers

Connect with people and share business information securely in real time using Chatter, right from the Employee Workspace homepage.

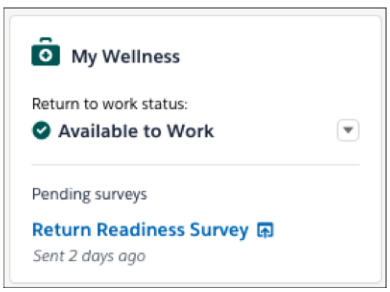
Use Chatter to collaborate, discuss, and grow together as a team.

- Select what you want to see in the feed. For example, select **What I Follow** to see updates for everything you follow, including posts from people you follow, groups you're a member of, and files and records you're following.
- To navigate to the group list page, click **See All Groups**. The **Groups** page lists all the groups that you're a member, owner, or manager of the group.
- Post, comment, create polls, or ask questions. When you post to your feed, everyone who follows you can view, comment on, like, or share the post.
- Click **Follow** on the Profile page of an employee to see their updates in your Chatter feed.

  Note: If the Profile page doesn't reflect the follow status correctly after you click **Follow** or **Unfollow**, refresh the page.

Take Your Wellness Survey

If your admin installed the My Wellness component, you can verify your current wellness status and take any pending surveys from the Employee Workspace homepage. Otherwise, this option may not be available.



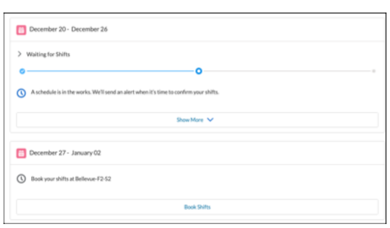
SEE ALSO:

Respond to Surveys

Wellness Check

Manage Your Workplace Shifts

If your admin installed the components to manage workplace shift schedule, you can find shifts, confirm your availability, and view your on-site arrival pass from the Employee Workspace homepage. Otherwise, this option may not be available.



SEE ALSO:

Shift Management for Work.com

Manage Your Profile

Virtual collaboration is the new way to connect and communicate. Keep your profile up to date and let your colleagues know who you are and what you do.

[Get to Know Your Colleagues]
Your profile gives your colleagues a great way to know you better.
[Share Your Work Experiences]
You can create a virtual resume and add, edit, or delete your current and past experiences. The virtual resume is a great way to showcase your expertise in organizational work and passion for community volunteering.

Get to Know Your Colleagues

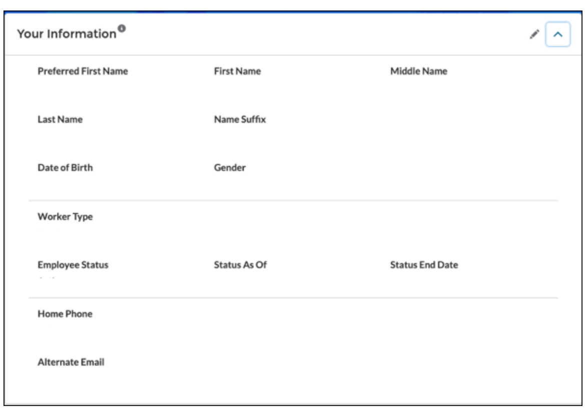
Your profile gives your colleagues a great way to know you better.

- Share your bio. Introduce yourself with a paragraph or two.
- Add your preference for what you want to be called by updating your preferred first name. If you don't specify your preference, the display name on your profile page uses your first name.
- Set your status. You can add an out-of-office message or brief work note here. Or you can put on your creative hat and let people know what you're up to.
- Indicate your availability. Specify your time zone, mention your work hours, and update your contact info so that your coworkers know when and how to contact you.
- Showcase your experience. Create a virtual resume and add your work experience, volunteer effort, and other relevant achievements.

Note: Only your system administrator can edit your photo and the banner displayed on your Profile page.

Edit Your Personal Information

You can edit your personal information in the Your Information card on the Profile page. This information is displayed only on your own profile page. When colleagues search and view your profile, they don't see this information.



In the current release, you can't edit picklist fields, such as `Gender`. Contact your system administrator for changes to fields you can't edit.

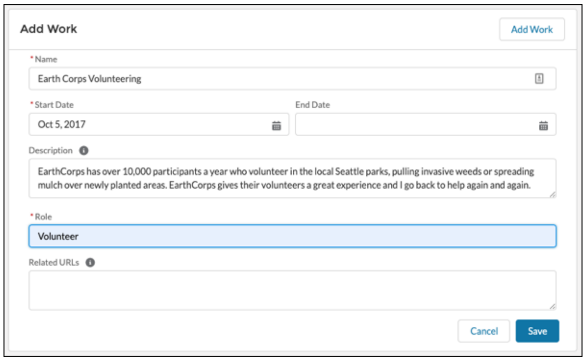
Share Your Work Experiences

You can create a virtual resume and add, edit, or delete your current and past experiences. The virtual resume is a great way to showcase your expertise in organizational work and passion for community volunteering.

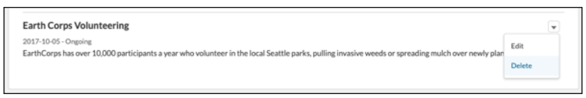
1. In the **Work Experience** section of the Profile page, click **Add Work**.
2. Add your responsibilities during the work experience and share your accomplishments. These are the required fields:
   - `Name`

- `Start Date`
- `Role`

3. Click **Save**.



You can edit or delete an experience from your virtual resume.

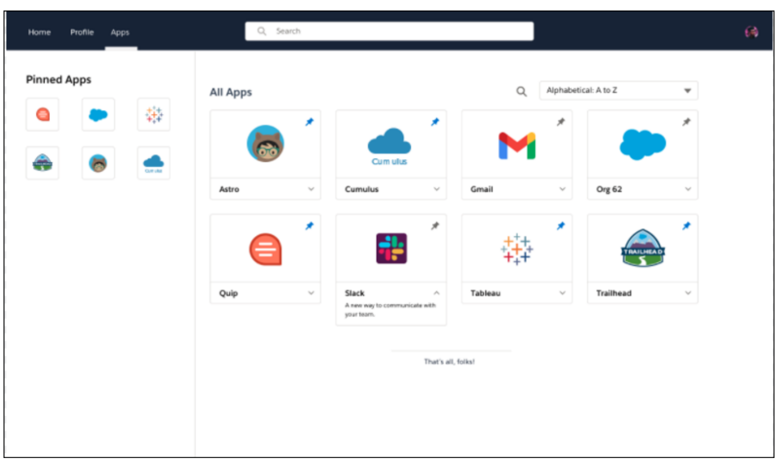


Access Apps You Need to be Productive

Get access to all the apps available to you from one place and without having to log in again.

You can pin up to six of your most-used apps for quick access. You can also access your pinned apps from the Employee Workspace homepage.

To pin an app, click the pin icon ( ). A icon indicates a pinned app.



Find Answers and Solve Issues with Employee Concierge

If your organization has added Employee Concierge to your Employee Workspace site, search your Employee Workspace to find knowledge articles on a range of topics. If you can't find the information you need, open a ticket to request help from a support agent.

USER PERMISSIONS

To access Employee Concierge in Employee Workspace:

- Permissions and licenses associated with any Employee Concierge persona

Search for Knowledge in Your Employee Workspace

Knowledge articles can cover a range of topics, including workplace policy, procedures, technical troubleshooting, and general FAQs. Use the Employee Workspace search to find articles.

View and Manage Your Tickets

Create, update, and track the progress of your support requests from My Tickets.

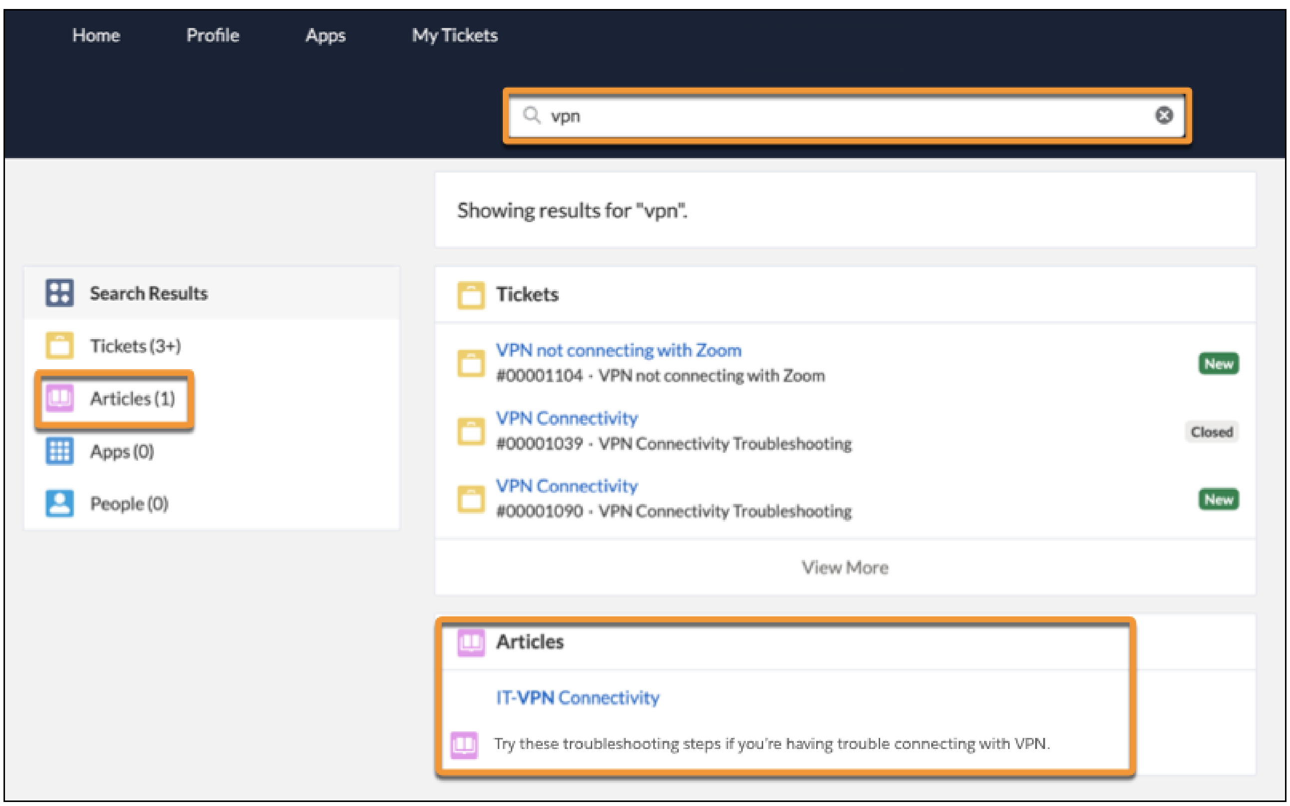
Get Started as an IT Agent with Agent Desk

Agent Desk gives IT Agents the tools they need to manage and resolve support tickets. Agent Desk is a Salesforce app included with Employee Concierge.

Search for Knowledge in Your Employee Workspace

Knowledge articles can cover a range of topics, including workplace policy, procedures, technical troubleshooting, and general FAQs. Use the Employee Workspace search to find articles.

Knowledge articles offer on-demand help and information. Knowledge articles appear in your search results when Employee Concierge is installed and configured for your Employee Workspace.

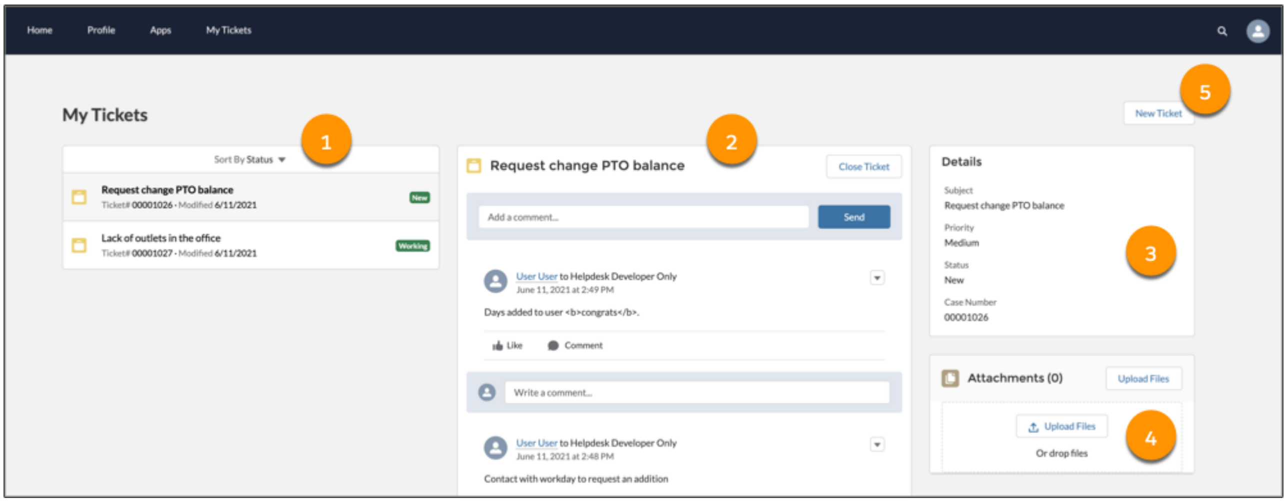


View and Manage Your Tickets

Create, update, and track the progress of your support requests from My Tickets.

To get to My Tickets, go to the My Tickets tab in your Employee Workspace.

My Tickets includes a sortable list of your tickets and their current statuses. Select a ticket from the list (1) to see the feed and history for that ticket (2), including status changes and comments from IT Agents. Use this feed to add a comment, attach a file, or close your ticket. The Details panel (3) displays important fields for your selected ticket. You can view and edit a list of files for the ticket in the Attachments panel (4). You can also create tickets (5) from My Tickets.



After you create one or more tickets, the tickets also appear in your Employee Workspace search results. You can search for tickets by keyword or ticket number.

Get Started as an IT Agent with Agent Desk

Agent Desk gives IT Agents the tools they need to manage and resolve support tickets. Agent Desk is a Salesforce app included with Employee Concierge.

USER PERMISSIONS

To access Agent Desk:

- Permissions and licenses associated with the Employee Concierge persona IT Agent

Navigate Agent Desk
Access Agent Desk and get comfortable with the app navigation.

Manage and Resolve Tickets with Agent Desk
Update, edit, and resolve support tickets from one screen in the Agent Desk app.

Create Tickets in Agent Desk
Employees can create their own tickets in Concierge, but IT Agents can also create tickets directly from Agent Desk.

Create and Manage Knowledge Articles for Employee Concierge
Write, edit, and publish the knowledge articles that appear in the Employee Concierge search results. Knowledge articles provide information to employees on any topic, including employee policies, technical troubleshooting steps, or general FAQs.

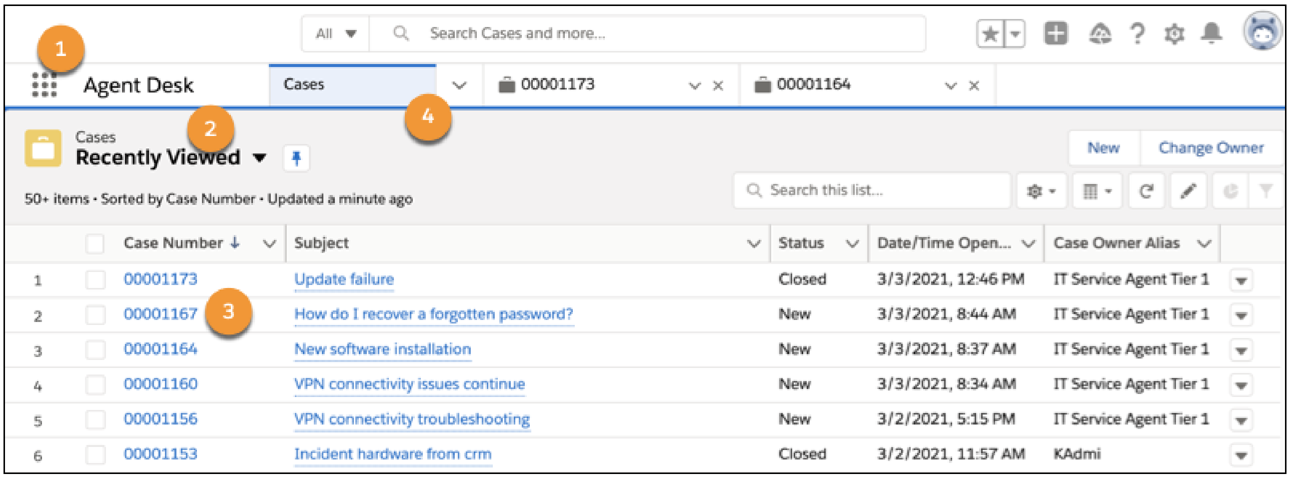
Agent Desk Considerations
To successfully manage and resolve support tickets with Agent Desk, there are a few considerations to mind.

Navigate Agent Desk

Access Agent Desk and get comfortable with the app navigation.

Use the App Launcher (1) to search for and open Agent Desk.

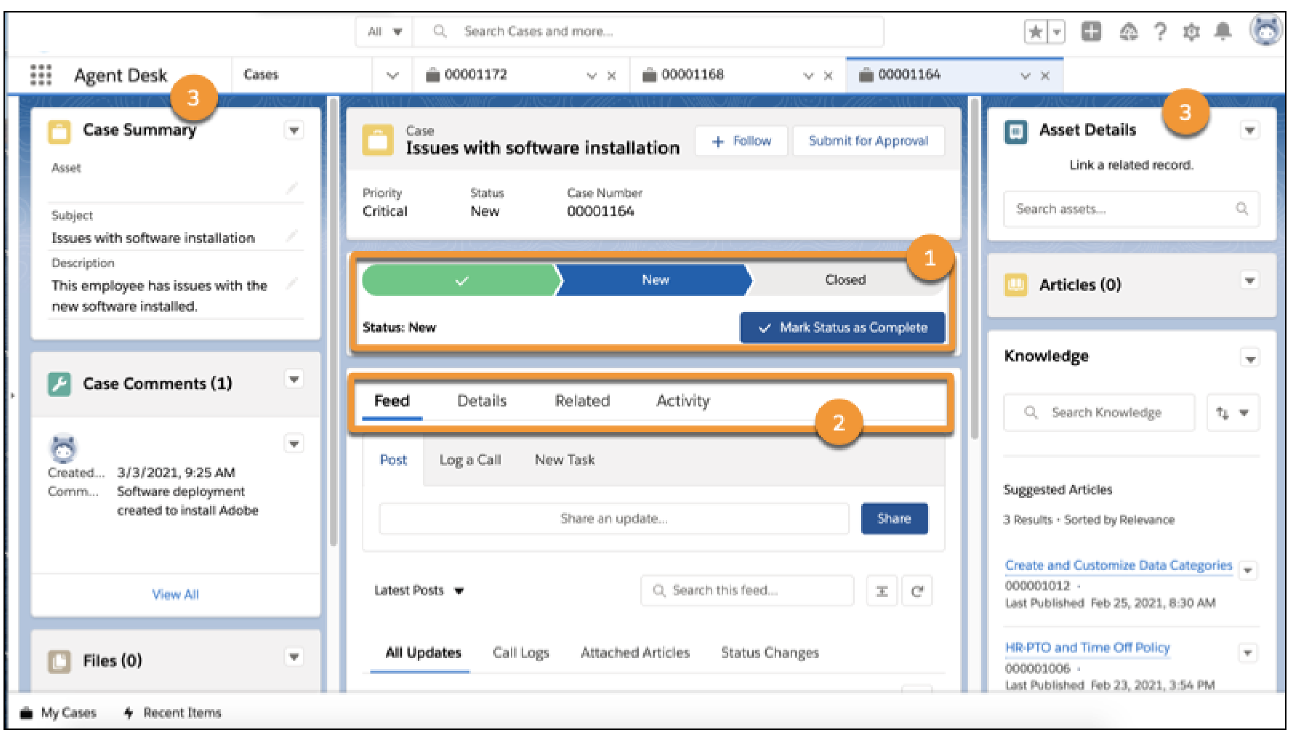
When you open Agent Desk, you have a list view for cases. You can switch between list views by clicking the dropdown menu immediately following the name of the current list view (2). The predefined list views available to you vary by your profile and the case sharing rules your Salesforce admin created. From any list view, click a case number (3) to open the ticket details. Use the console navigation (4) to open list views and records for other Salesforce objects, such as Knowledge or Assets.



Manage and Resolve Tickets with Agent Desk

Update, edit, and resolve support tickets from one screen in the Agent Desk app.

As a Salesforce console app, Agent Desk gives you multiple panels in a single window so you can manage and resolve tickets quickly. Console app navigation lets you open records as tabs, which means you can have several tickets or records open at the same time.



The center panel includes key information about the case record you're currently working with. Use the Path (1) to see and update the case status quickly. Use Feed, Details, Related Records, and Activity (2) to toggle between updating or commenting on the case. Side panels (3) provide more context and information related to the case or the employee.

For more information on console app navigation and options, review Salesforce Help and Trailhead. Talk to your Salesforce admin for information about Agent Desk and Employee Concierge.

SEE ALSO:

Agent Desk Considerations

My Support Tickets Page and Service Console Case Feed Access Considerations

My Support Tickets Page and Service Console Case Feed Access Considerations

Lightning Service Console

Manage and Work with Cases

Salesforce Trailhead: Service Cloud Agent Experience

Create Tickets in Agent Desk

Employees can create their own tickets in Concierge, but IT Agents can also create tickets directly from Agent Desk.

1. From the Cases list view, click **New**.
2. Select a type for the new case (if available), then click **Next**.
3. Fill out the required fields.
4. Upload any files that you want to attach to the ticket, such as a screenshot.

   There's no limit to the number of files that you can attach to a ticket. You can upload up to 10 files at a time.
5. Save your changes.

From the inline dropdown menu for each case, you can also edit or delete the case and change the case owner.

Note: When you create a case on behalf of an employee, you must populate both the Account Name and Contact Name fields with the employee's person account.

Create and Manage Knowledge Articles for Employee Concierge

Write, edit, and publish the knowledge articles that appear in the Employee Concierge search results. Knowledge articles provide information to employees on any topic, including employee policies, technical troubleshooting steps, or general FAQs.

1. From the App Launcher, search for and select **Knowledge**.
2. Click **New**.
3. Select an article record type (if available). Click **Next**. Record types determine what information is included in an article, and are managed by your Employee Workspace Admin.
4. Draft the article. Use the help text for guidance.
5. Click **Save**.
6. Select the **Draft Articles** list view.
7. Use the checkbox to select your next article.
8. Click **Publish**.

USER PERMISSIONS

To author and manage knowledge articles for Employee Concierge:

- Permissions and licenses associated with the IT Agent, Knowledge Author, or Employee Workspace Admin personas for Employee Concierge

9. Select either Publish Now or Scheduled publication on a future date.
10. Click **Publish**.

SEE ALSO:

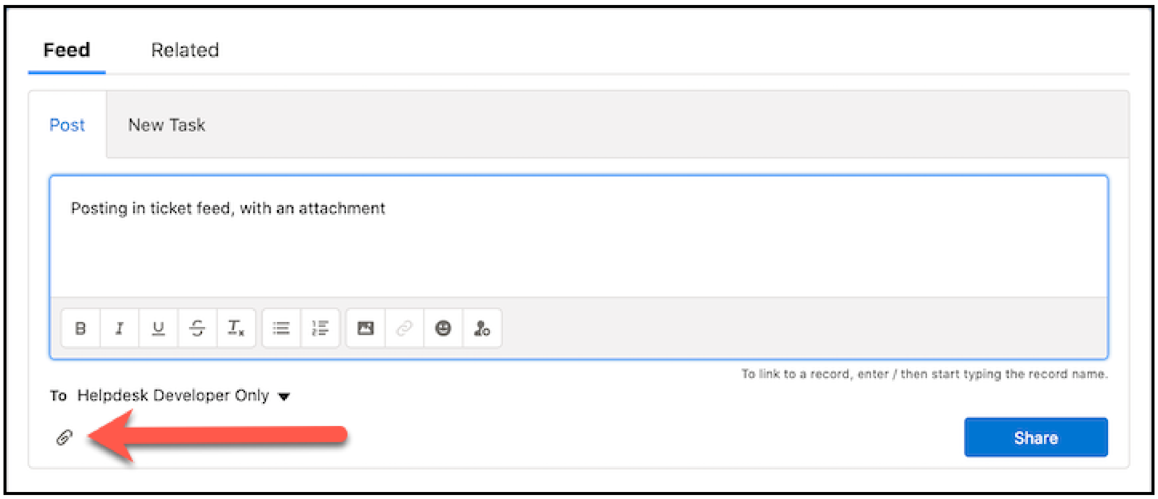
Create and Edit Articles

Authoring Actions in Lightning Knowledge

Agent Desk Considerations

To successfully manage and resolve support tickets with Agent Desk, there are a few considerations to mind.

- When you post a new comment to a ticket or when you comment on an existing post of a ticket, you can't insert inline images by using the Image button. Instead, upload images by clicking the paper clip icon.



- You can upload up to 10 files when you create a new post to a ticket.
- You can upload only one file when you add a comment to an existing post of a ticket.

Employee Concierge

Add Employee Concierge to Employee Workspace to set up a searchable knowledge base and ticketing system so employees can find solutions and get support when they need it.

Employees access Employee Concierge through the Employee Workspace Experience Cloud site. The searchable knowledge articles are written and managed by your IT Agents and Knowledge Authors, so the information addresses common questions and requests at your organization. If employees can't resolve an issue through a knowledge article, they can log a support ticket from the same Employee Workspace site. IT Agents manage and resolve employee tickets using Agent Desk, a Salesforce Lightning app that's added to your Salesforce org when you install Employee Concierge.

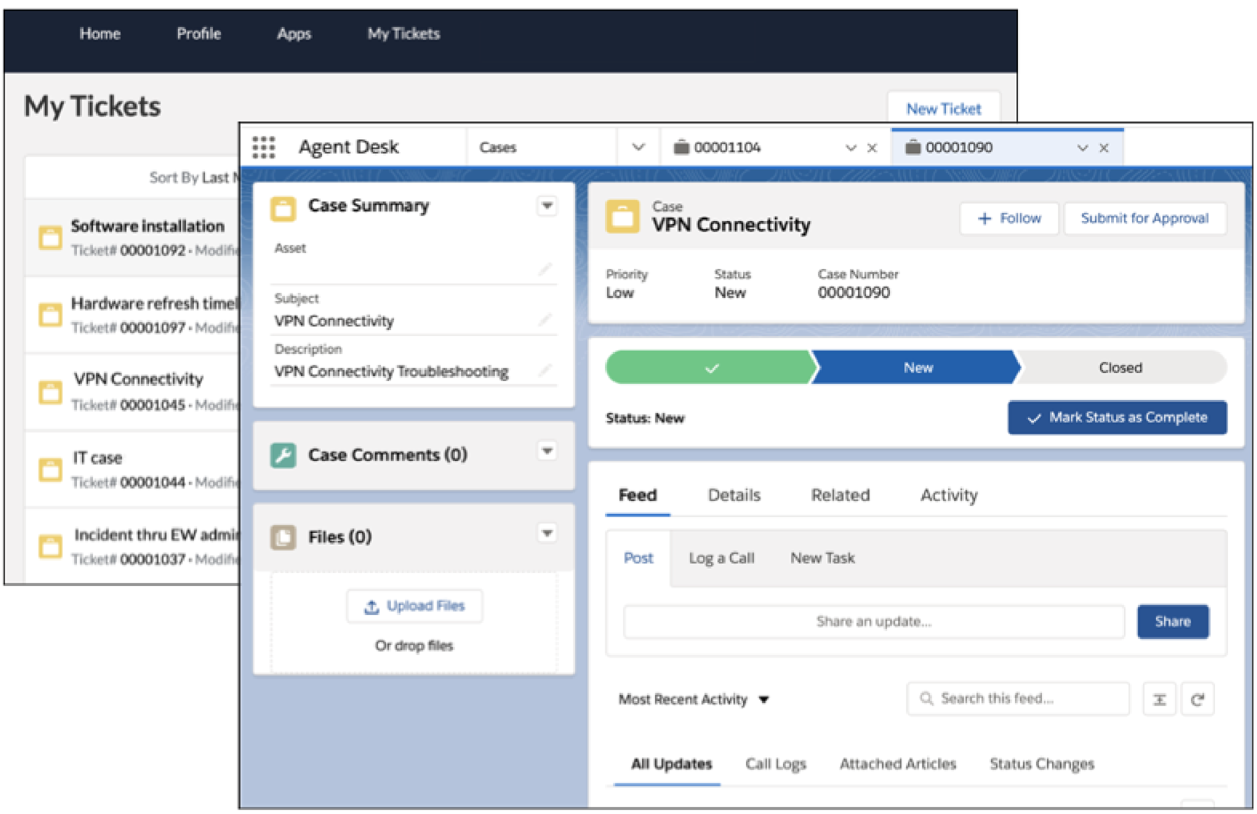
Important: Employee Concierge can only be installed in an org that has already installed and configured Employee Workspace and that has enabled person accounts. After installation, Employee Concierge requires additional setup and configuration.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee Concierge requires an Employee Experience, IT Agent or Employee Service Agent, Company Communities, Service User, and Knowledge User add-on licenses.



[Prepare for and Install Employee Concierge]

Before you can install and configure Employee Concierge, make sure you already have Employee Workspace set up and person accounts enabled in your org. When you're ready, install the Employee Concierge managed package and verify what was added to your org in the process. After installing the package, complete the required manual configuration using the information here to guide you.

[Review and Assign Employee Concierge Permissions]

We recommend using our Employee Concierge personas to help you decide how to assign permissions when creating new or configuring existing users in your org. Review the personas and permissions, then assign permissions to users.

[Assign Record Types and Enable Knowledge Access for Employee Concierge]

Assign record types the Case, Account, and Knowledge objects to the System Admin and IT Agent profiles. Then enable access and set field-level security for knowledge articles.

[Add Employee Concierge and Service Catalog to Your Workspace Site]

Employee Concierge and Service Catalog pages and components are available for installation in your Employee Workspace Site with the Digital Experiences site builder. Use the pages and components to streamline your employee service capacity for quick and efficient support services.

[Configure Employee Concierge Ticket Assignment]

To give IT Agents easy access to tickets, add them to a public group and create and associate a queue with that group. Then create and set assignment and sharing rules for tickets.

[Set Up the Agent Desk App]

To complete the setup for Agent Desk, assign page and record layouts, and share the custom list view.

[Manage Person Accounts and Employee Records]

Support tickets that are created by or for employees are stored and managed as case records. Employee Concierge uses person accounts to associate employee data with cases.

[Create Ticket Categories (Optional)]

By default, Employee Concierge includes one ticket category. This category is used for all tickets unless you add more categories to your org. Create additional categories to allow employees and IT Agents to create more than one type of ticket. To add ticket categories to your org, complete all configuration steps in this section. Adding ticket categories is optional.

[Prepare Your Team and Customize Concierge]

After installing and configuring Employee Concierge, make sure all users have the information they need to succeed. Users have different access, based on their persona and related permissions and licenses. You can also edit or add to the default Concierge configuration to best meet your organization's needs.

Prepare for and Install Employee Concierge

Before you can install and configure Employee Concierge, make sure you already have Employee Workspace set up and person accounts enabled in your org. When you're ready, install the Employee Concierge managed package and verify what was added to your org in the process. After installing the package, complete the required manual configuration using the information here to guide you.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee Concierge requires an Employee Experience, IT Agent or Employee Service Agent, Company Communities, Service User, and Knowledge User add-on licenses.

USER PERMISSIONS

To install Employee Concierge:
- Permissions and licenses associated with the Employee Workspace Admin persona for Employee Workspace

To install Service Catalog:
- Permissions and licenses associated with the Employee Workspace Admin persona for Employee Concierge

Configure Employee Workspace and Enable Person Accounts
: Employee Concierge requires Employee Workspace to be installed and configured. You also must have person accounts enabled in your org.

Install the Employee Concierge Package
: Use the Work.com installer to add the Employee Concierge managed package to your org. After installing the package, return here to verify what was added to your org and to complete the required post-installation configuration.

Verify the Employee Concierge Package Installation Customizations
: Several customizations are added to your org when you install Employee Concierge.

Enable Omni-Channel Routing for Employee Concierge
: Omni-Channel routing for the case object is automatically enabled when you install Employee Concierge version 8.5 for the first time. However, if you installed Employee Concierge prior to version 8.5 and choose to use Omni-Channel routing, you must manually enable it from Setup. In addition, you must create and deploy an Apex trigger and test class.

Configure Employee Workspace and Enable Person Accounts

Employee Concierge requires Employee Workspace to be installed and configured. You also must have person accounts enabled in your org.

Employee Workspace is a digital hub for your employees. The Employee Workspace site provides employees a central place to access tools and resources they need to connect, communicate, and collaborate.

If you already have Employee Workspace installed but have yet to complete the setup, use Salesforce Help to learn how to configure the package. If you don't have access to Employee Workspace, talk to your account manager for more information.

Person accounts store information about individual people by combining data from other objects into one record. Before enabling person accounts, the org must have at least one record type defined for the Account object. We recommend creating a record type called Business Account on the Account object. We also recommend adjusting the organization-wide default sharing setting on the Account object to Public Read Only.

Person accounts must be enabled in your account by Salesforce. When you're ready, contact Salesforce Customer Support or your account manager for more information.

SEE ALSO:

Employee Workspace

Enable Person Accounts

Create Record Types

Install the Employee Concierge Package

Use the Work.com installer to add the Employee Concierge managed package to your org. After installing the package, return here to verify what was added to your org and to complete the required post-installation configuration.

Note: Before installing this package, confirm that these Salesforce installer IP addresses aren't within any restricted ranges, or add them to an allowlist:

- 18.214.2.206
- 3.89.46.237
- 52.201.65.75
- 52.2.53.142

You can remove these IP addresses from your allowlist after installation.

1. From your browser, navigate to https://install.work.com.
2. Click **Employee Productivity**, and then click **Employee Concierge**.
3. Click **Install and Configure Employee Concierge**.
4. Click **Log In to Start Pre-Install Validation**.
5. Select your org type, and enter your Salesforce username and password.
6. To run the pre-installation validation, click **Allow**.
7. In the Connected to Salesforce box, confirm that you're logged in to the correct org. If the pre-install validation fails, use the error messages in the installer to troubleshoot and complete the pre-installation requirements. When you're ready, return to the installer URL and try again.
8. Review the list of customizations that the installer makes in your org.
9. Click **Install**. To accept the terms of use, click **Confirm**.

After a successful installation, verify that the added components and customizations are in your org. Then continue with the required configuration steps. These steps include enabling Omni-Channel, assigning licenses and permissions, and setting up tickets, knowledge articles, and access to the IT Agent app and features.

Verify the Employee Concierge Package Installation Customizations

Several customizations are added to your org when you install Employee Concierge.

Installation Step Name	What It Does
Enable Knowledge Access	Enables Knowledge Access for Employee Workspace Admin installing Employee Concierge. Enable this setting manually for Knowledge Authors, IT Agents, and (optionally) other admins.
Enable Knowledge Authoring	Enables authoring and editing knowledge articles in the org.
Enable Omni-Channel	Enables Omni-Channel case routing in the org.
Set organization-wide defaults for the Account, Contract, Contact, and Case objects. Add custom fields, record types, and their translations to the Knowledge object.	• Sets the organization-wide default for the Account and Contract objects to Public Read Only. • Sets the organization-wide default for the Contact object to Controlled by Parent. • Sets the organization-wide default for the Case object to Private. • Enables Feed Tracking by default for the Case object.

Installation Step Name	What It Does
	Important: You can disable Feed Tracking, but disable it only temporarily. Re-enable Feed Tracking so that it works as expected in Employee Concierge. • Adds the custom fields Body, Case Description, and Case Subject to the Knowledge object and the Knowledge Layout. • Adds the custom record types HR Knowledge Article and IT Knowledge Article to the Knowledge object. • Makes the custom record types available to all profiles and applies them to the Knowledge Page Layout. • Adds translations of the listed custom fields and custom record types to the Knowledge object.
Install the Employee Concierge Managed Package	Installs the Employee Concierge packaged settings including permission sets, triggers, custom metadata types, and pages for the Employee Experience site.
Create the Employee Concierge User Data Access, Employee Knowledge User, and the Knowledge Manager permission sets	Creates three permission sets. Assign these permissions sets to users. Review the documentation on Employee Concierge permission sets and personas for more information on each one.
Admin permission set license configuration	Admin permission set license configuration is used as name. Assigns the Service User permission set license, the Employee Concierge User Data Access permission set, and the Service Catalog Builder permission sets for admins. The Service Catalog Builder permission set requires Service Catalog to be enabled in your org.
Create the Employee Service Site	Creates a sample community using the Employee Service template that is labeled `Employee Service Community` in preview status.
Customize the Employee Service Site	Update the Members tab on the sample community to apply the Employee Workspace User permission set.
Employee Service Navigation Menu	Set up the Navigation Menu for the Employee Service Community that includes Home and My Support Tickets and can include Service Catalog and My Service Catalog Requests. The addition of the Service Catalog and My Service Catalog Requests tabs to your navigation menu requires Service Catalog to be enabled in your org.
Enable access to the Digital Experiences app	Enables CMS access to create and share content easily on the Employee Concierge site.
Create a Public Group for IT Service Agents Tier 1	Creates a public group called IT Service Agents Tier 1. Assign users and associate the group with a queue to assign cases to the group.
Create the IT Agent profile. Configure object permissions and tab settings for the IT Agent and System Administrator profiles.	• Creates the IT Agent profile • Configures the Asset and Knowledge object tab, record types and page layout assignments, and permissions for the IT Agent profile. • Configures the Accounts and Cases object tab, record types and page layout assignments, and permissions for the System Administrator profile.
Create the Agent Desk Lightning App	• Creates the Agent Desk console app for managing case records (Tickets).

Installation Step Name	What It Does
	• Gives access to the Agent Desk app to the IT Agent and System Administrator profiles.
Assign the Agent Desk app to the IT Agent and System Administrator profiles	Makes the Agent Desk app visible and the default for the IT Agent and System Administrator profile.
Assign the Agent Desk app to the Knowledge Manager permission set	Enables the Agent Desk app for users assigned the Knowledge Manager permission set.
Create the IT Case Page Layout and Compact Layout.	• Creates the IT Case page layout and compact page layout. • Assigns the compact page layout to the IT records. • Ensures that the Account Name and Contact Name fields on the Case page layout are editable. • Assign the IT Case page layout to the IT record type manually.
Create Quick Actions for IT Cases and Assets. Create the IT Case Path.	• Creates two update-records quick actions. • Creates the quick action called IT Case Summary on the Case object. • On the Asset object, creates the quick action Asset Details on the Asset object. • Creates the path called IT Case. If the IT Case path is disabled, enable the Path feature manually.
Create the IT Case Record Page	Creates a custom record page layout on the Case object called IT Case. Activate and assign the IT Case record page layout manually.
Create `AgentWork` trigger for Omni-Channel routing	Creates an `AgentWork` trigger to allow employee case sharing for Omni-Channel routing.

SEE ALSO:

Enable the IT Case Path

Feed Tracking

Customize Chatter Feed Tracking

Enable Omni-Channel Routing for Employee Concierge

Omni-Channel routing for the case object is automatically enabled when you install Employee Concierge version 8.5 for the first time. However, if you installed Employee Concierge prior to version 8.5 and choose to use Omni-Channel routing, you must manually enable it from Setup. In addition, you must create and deploy an Apex trigger and test class.

Complete all steps in your sandbox. Then use an Outbound Change Set to deploy your Apex trigger and test class to production.

1. Enable Omni-Channel.
   a. From Setup, in the Quick Find box, enter *`Omni-Channel`*, and select **Omni-Channel Settings**.
   b. Select **Enable Omni-Channel**.
2. Create an Apex trigger.
   a. From the quick access menu ( ), select **Developer Console**.

b. Select **File** > **New** > **Apex Trigger**.

c. In the New Apex Trigger window, name the trigger `AgentWorkTrigger`, and select **Agent Work** as the sObject.

d. Click **Submit**.

e. In the AgentWorkTrigger field, enter the provided code.

```
trigger AgentWorkTrigger on AgentWork(before insert, after insert, after update)
{
    if (Trigger.isAfter) {
        wkdw.AgentWorkTriggerHandlerGlobalProxy.handleTrigger(
            Trigger.newMap,
            Trigger.oldMap,
            Trigger.operationType
        );
    } else {
        for (AgentWork aw : Trigger.new) {
            if (aw.WorkItemId == null) {
                System.debug('WorkItemId should not be null');
            }
        }
    }
}
```

f. Select **File** > **Save**.

g. From Setup, in the Quick Find box, enter `Apex Triggers`, and confirm that the AgentWorkTrigger status is active.

3. Create an Apex trigger test.

a. Select **File** > **New** > **Apex Class**.

b. In the New Apex Class window, name the class `AgentWorkTriggerTest`, and click **Submit**.

c. In the AgentWorkTriggerTest field, enter the provided code.

```
@IsTest
public class AgentWorkTriggerTest {
    @IsTest
    public static void AgentWorkTriggertest() {
        try {
            AgentWork newAgentWork = new AgentWork();
            insert newAgentWork;
        } catch (Exception ex) {
            // FIELD_INTEGRITY_EXCEPTION, The agent's status is not associated with
the channel for this work.: [ServiceChannelId] will be caught after the trigger
invocation
        }
    }
}
```

d. Select **File** > **Save**.

4. Deploy the Apex trigger and its test class from your sandbox to your production org as described in this Knowledge Article.

SEE ALSO:

Install the Employee Concierge Package

Salesforce Help: Omni-Channel

Review and Assign Employee Concierge Permissions

We recommend using our Employee Concierge personas to help you decide how to assign permissions when creating new or configuring existing users in your org. Review the personas and permissions, then assign permissions to users.

USER PERMISSIONS

To configure Employee Concierge:
- Permissions and licenses associated with the Employee Workspace Admin persona for Employee Concierge

Meet the Employee Concierge Personas
The Employee Concierge personas can help you decide the levels of access you want to give your users. Think of each user as being one of the personas. Salesforce uses these personas to organize and recommend permission assignments.

Review the Employee Concierge Permissions
Installation of Employee Concierge adds permissions to your org. Before assigning them to users, review what type of access each permission grants.

Assign Employee Concierge Permissions
Assign users the Employee Concierge user license, profile, feature licenses, permission set licenses, and permission sets that they need. We recommend using the Employee Concierge personas to help guide the process, but grant access to users based on your business needs.

Meet the Employee Concierge Personas

The Employee Concierge personas can help you decide the levels of access you want to give your users. Think of each user as being one of the personas. Salesforce uses these personas to organize and recommend permission assignments.

Employee Workspace Admin

A Salesforce system admin. These users have full access to Employee Workspace and Employee Concierge settings and data. They can configure a site and provide access to members.

Employee

An employee who has access to the Employee Workspace site. These users can access their profile page and tickets, connected apps, and published knowledge articles. If employees have access to the Salesforce org, these users can also view and edit the records they own or records that are shared with them.

Important: Employees who access Employee Workspace must have an associated user record to log in to the site and access data. After you add employee records, use the User lookup field to link employee and user records.

IT Agent

An employee who is a knowledge author and can access Agent Desk, a Salesforce app for managing Employee Concierge tickets. They have access to the Employee Workspace site and your Salesforce org.

Knowledge Author

An employee, often an expert in some area, who can create and publish knowledge articles for Employee Concierge. Depending on your organization, Knowledge Authors can be IT Agents or other employees.

When you install the Employee Concierge managed package following our instructions, permissions for each of these personas are added. Review the Employee Concierge permissions for more information on the access these permissions grants. Decide which persona is right for each employee and assign permissions based on their needs.

SEE ALSO:

Meet the Employee Workspace Personas

Create and Link Employees and Users

Service Console Case Feed Accessibility for Employee Users Who Are Service Agents

Review the Employee Concierge Permissions

Installation of Employee Concierge adds permissions to your org. Before assigning them to users, review what type of access each permission grants.

Permission Set Name	Description
Employee Concierge Access	Provides access to Employee Concierge features. Included in the Employee Concierge package.
Employee Workspace Admin	Gives full access to standard and custom objects related to Employee Workspace data. Included in the Employee Workspace package.
Employee Concierge User Data Access	Gives employees access to the Case object for logging tickets. Created during the installation and configuration process of Employee Workspace.
Employee Workspace User	Grants access to Employee Workspace managed features. Included in the Employee Workspace package.
Employee Knowledge User	Allows employees to search for and read knowledge articles. Created during the Employee Workspace installation and configuration process.
Employee Concierge User	Grants access to Employee Concierge managed features, such as custom fields and record types. Included in the Employee Concierge package.
Knowledge Manager	Gives access to create and manage knowledge articles. Created during the installation and configuration process of Employee Workspace.
Service Catalog Builder	Gives access to Service Catalog Builder in Setup where you create and manage Service Catalog pages and components for your Employee Workspace Site. This permission set is available if Service Catalog is enabled in your org.
Service Catalog User	Gives employees access to create and read requests and request related item objects. This permission set is available if Service Catalog is enabled in your org.

In addition to these permission sets, the Employee Concierge managed package includes the Employee Concierge Access Group. This group contains the permission sets Employee Concierge Access and Employee Concierge User.

Permission Set License Name	Description
Employee Workspace and Employee Concierge	Provides access to Employee Workspace and the employee experience data model. Provides access Employee Concierge if at least one IT Agent add-on license is associated with the org.

Permission Set License Name	Description
Employee Experience	Provides user access to employee experience data model and permission.
Service User	Enables Salesforce admin to track distribution of Service User licenses. Permission set assignment not required.
Company Community for Force.com	Company Community permission set license for existing Force.com users.
Knowledge User	Enables Salesforce Knowledge and permission to manage (create, edit, and publish) articles.

Assign Employee Concierge Permissions

Assign users the Employee Concierge user license, profile, feature licenses, permission set licenses, and permission sets that they need. We recommend using the Employee Concierge personas to help guide the process, but grant access to users based on your business needs.

When you install Employee Concierge, your Salesforce admin user is assigned the Employee Workspace Admin licenses and permissions. You must, however, enable the feature licenses for the Employee Workspace Admin persona on your own user before assigning permissions and licenses to other users.

To grant Employee Workspace Administrator or Employee persona access to existing users that you set up when configuring Employee Workspace, assign permission set licenses and permission sets.

To grant IT Agent or Knowledge Author persona access to existing users, reassign the user license and profile, then assign permission set licenses and permission sets.

New users for any persona require a user license, profile, feature licenses, permission set licenses, and permission sets.

Important: You are required to have Service Catalog enabled in your org to assign the Service Catalog User permission set license, Service Catalog User permission set, and the Service Catalog Builder permission set.

Table 1: Employee Concierge Employee User Permission Set Assignments Table

Persona	User License	Profile	Feature Licenses	Permission Set Licenses	Permission Sets	Permission Set Group
Employee Workspace Admin	Salesforce	System Admin	Service Cloud User	• Employee Experience • Employee Workspace and Employee Concierge • Service Catalog User	• Employee Workspace Admin • Employee Concierge User Data Access • Service Catalog Builder	Employee Concierge Access Group
Employee with the Productivity Starter License	Salesforce Platform	• Salesforce Platform	N/A	• Employee Experience	• Employee Workspace User	Employee Concierge Access Group

Persona	User License	Profile	Feature Licenses	Permission Set Licenses	Permission Sets	Permission Set Group
		• Copy of Standard Platform User		• Company community for Force.com • Employee Workspace and Concierge • Service Catalog User	• Employee Workspace User Data Access • Employee Concierge User Data Access • Employee Knowledge User • Service Catalog User	

Table 2: Employee Concierge Service Agent and Knowledge Author Permission Set Assignments Table

Persona	User License	Profile	Feature Licenses	Permission Set Licenses	Permission Sets	Permission Set Group
IT Agent	Salesforce	• Standard User • IT Agent • Clone of Standard User or IT Agent	Service Cloud User	Service Catalog User	Service Catalog User	N/A
Knowledge Author	Salesforce	• Standard User • Clone of Standard User	• Service Cloud User • Knowledge User	Service Catalog User	• Knowledge Manager • Service Catalog User	N/A

Tip: If you have employees who aren't also users in your existing org, try the employee-user sync setting on page 36. This setting lets you create user records from existing employee records and assign the user license and profile in bulk.

For step-by-step guidance on how to assign users each license or permission type, refer to the relevant Salesforce Help topic.

SEE ALSO:

User Licenses
Profiles
Permission Set Licenses
Permission Sets
Add a Single User
Feature Licenses Overview
Add Multiple Users
Service Console Case Feed Accessibility for Employee Users Who Are Service Agents

Assign Record Types and Enable Knowledge Access for Employee Concierge

Assign record types the Case, Account, and Knowledge objects to the System Admin and IT Agent profiles. Then enable access and set field-level security for knowledge articles.

USER PERMISSIONS

To configure Employee Concierge:

- Permissions and licenses associated with the Employee Workspace Admin persona for Employee Concierge

Assign Record Types to the System Admin Profile

The tab settings and object permissions for the System Admin profile are customized when you install the Employee Concierge package. To complete the setup for this profile, assign record types to the Case and Account objects.

Assign Record Types to the IT Agent Profile

The tab settings and object permissions for the IT Agent profile are customized when you install the Employee Concierge package. To complete the setup for this profile, assign record types to the Knowledge object.

Enable Knowledge Access for Knowledge Authors

To create and manage knowledge articles, enable knowledge access for all Knowledge Authors and IT Agents.

Add Custom Fields to Knowledge Page Layout

When you install the Employee Concierge package, we create three custom fields and add them to the Knowledge object: Body, Case Description, and Case Subject. Add them to the Knowledge page layout.

Make Custom Fields for Knowledge Articles Visible

Set the field-level security to the custom Knowledge fields Body, Case Description, and Case Subject to make them visible to users.

SEE ALSO:

Assign Employee Concierge Permissions

Assign Record Types to the System Admin Profile

The tab settings and object permissions for the System Admin profile are customized when you install the Employee Concierge package. To complete the setup for this profile, assign record types to the Case and Account objects.

1. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.
2. In the Profiles table, click **System Administrator**.
3. Under Apps, click **Object Settings**.

4. Search for and select **Accounts**, and then click **Edit**.
5. Under Record Types and Page Layout Assignments, make these selections:
   a. For Person Account, select **Assigned Record Types** and **Default Record Type**.
   b. Deselect all other options.
   c. Save your changes.
6. Find and select **Cases**, and then click **Edit**.
7. Under Record Types and Page Layout Assignments, make these selections:
   a. For IT, select **Assigned Record Types** and **Default Record Type**.
   b. For Page Layout Assignment, select **IT**.
   c. Deselect all other options.
   d. Save your changes.
8. Confirm the object settings for the System Admin profile:

   Accounts

   For Tab Settings: Default On

   For Object Permissions: Read, Create, Edit, Delete, View All, Modify All

   For Record Types and Page Layout Assignments: Person Account is an Assigned Record Type and a Default Record Type

   Case

   For Tab Settings: Default On

   For Object Permissions: Read, Create, Edit, Delete, View All, Modify All

   For Record Types and Page Layout Assignments, under IT: Assigned Record Type and Default Record Type

Assign Record Types to the IT Agent Profile

The tab settings and object permissions for the IT Agent profile are customized when you install the Employee Concierge package. To complete the setup for this profile, assign record types to the Knowledge object.

1. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.
2. In the Profiles table, click **IT Agent**.
3. Under Apps, click **Object Settings**.
4. Search for and select **Knowledge**, and then click **Edit**.
5. Under Record Types and Page Layout Assignments, for IT Knowledge Article, select **Assigned Record Type** and **Default Record Type**.
6. Save your changes.
7. Confirm the object settings for the IT Agent profile:

   Assets

   For Tab Settings: Default On

   For Object Permissions: Read, Edit

   Knowledge

   For Tab Settings: Default On

For Object Permissions: Read, Create

For Record Types and Page Layout Assignments, under IT Knowledge Article: Assigned Record Type and Default Record Type

Enable Knowledge Access for Knowledge Authors

To create and manage knowledge articles, enable knowledge access for all Knowledge Authors and IT Agents.

1. From Setup, use Quick Find to search for and select **Users**.
2. Click **Edit** next to the user's name.
3. Select the **Knowledge User** checkbox.
4. Save your changes.

Note: The Knowledge User setting is automatically enabled for the Employee Workspace Admin that installs the Employee Concierge package. Enable this setting for any other Workspace Admins who need to author or manage knowledge articles.

SEE ALSO:

Lightning Knowledge User Access

Add Custom Fields to Knowledge Page Layout

When you install the Employee Concierge package, we create three custom fields and add them to the Knowledge object: Body, Case Description, and Case Subject. Add them to the Knowledge page layout.

1. From Setup, click **Object Manager**.
2. Click **Knowledge** then **Page Layouts**.
3. Click **Knowledge Layout**.
4. Drag the Body, Case Subject, and Case Description fields into the Knowledge Detail Information section.
5. Save your changes.

Make Custom Fields for Knowledge Articles Visible

Set the field-level security to the custom Knowledge fields Body, Case Description, and Case Subject to make them visible to users.

1. From Setup, click **Object Manager**.
2. Search for and select **Knowledge**
3. Click **Fields & Relationships**.
4. Use Quick Find to search for and then the field **Body**.
5. Click **Set Field-Level Security**.
6. To make this field visible to all profiles, select **Visible** in the table header.
7. Save your changes.

Repeat the process with the fields Case Description and Case Subject.

Important: Don't apply field-level security restrictions on the account name or contact name fields on the Case object. The ticket-creation process doesn't work if these fields are restricted.

SEE ALSO:

Field-Level Security

Add Employee Concierge and Service Catalog to Your Workspace Site

Employee Concierge and Service Catalog pages and components are available for installation in your Employee Workspace Site with the Digital Experiences site builder. Use the pages and components to streamline your employee service capacity for quick and efficient support services.

The available Employee Concierge components and pages are:

- Employee Concierge Search component
- Knowledge articles and the knowledge article page
- Tickets component and the My Support Tickets page
- Concierge New Ticket Form
- Attachments component

When Service Catalog is enabled in your org, the available Service Catalog components and pages are:

- Service Catalog page
- My Service Catalog Requests page
- Request Detail component
- Request List component
- Featured Catalog component

In addition to the required user permissions and license parameters, keep in mind the provided Employee Concierge version and template information that's outlined in the table. This information provides guidance on automated and manual setup for the Employee Concierge and Service Catalog pages and components.

Important: If you don't have an Employee Productivity Plus permission set license or the ITSC Endpoint Add-on, the Service Catalog components are accessible in the Digital Experiences site builder, but they're not available in your Employee Workspace Community. Only the Employee Concierge pages and components are available to you.

USER PERMISSIONS

To install Employee Concierge pages and components:

- Permissions and licenses associated with the Employee Workspace Admin persona for Employee Workspace

To install Service Catalog pages and components:

- - Employee Productivity Plus permission set license or the ITSC Endpoint Add-on
  - Permissions and licenses associated with the Employee Workspace Admin persona for Employee Concierge.

  Important: You must enable Service Catalog enabled in your org to:

  - Assign the Service Catalog permissions and licenses
  - Install Service Catalog pages and components

Table 3: Employee Concierge Version and Template Configuration Tasks to Complete

Customer type Defined by Employee Concierge Version	Template Used	Installation Method	Pre-Setup pages and Components From The installation method	Tasks to complete
Existing customer with version 8.6 and later without Service Catalog	Employee Workspace	Upgrade	Home, Knowledge Article, and My Support Tickets Pages and Components	**1.** Optional: Add the My Support Tickets List to Your Home Page on page 159 (step 6) Note: Adding the My Support Tickets List component to your home page is optional as your Employee Workspace site already has this component. The component name is changed as of Employee Concierge version 9.2. Its functionality is the same. **2.** Rename your My Tickets Page on page 163 (step 5) **3.** Publish Your Employee

Customer type Defined by Employee Concierge Version	Template Used	Installation Method	Pre-Setup pages and Components From The installation method	Tasks to complete
				Workspace Site on page 168
Existing customer with version 8.6 and later with Service Catalog	Employee Workspace	Upgrade	Home, Knowledge Article, and My Support Tickets Pages and Components	1. Add Service Catalog Pages and Components to Your Employee Workspace Site on page 141 2. Add the Support Tickets and Service Catalog Components to Your Workspace Home Page on page 159 Note: Adding the My Support Tickets List component to your home page is optional as your Employee Workspace site already has this component. The component name is changed as of Employee Concierge version 9.2. Its

Customer type Defined by Employee Concierge Version	Template Used	Installation Method	Pre-Setup pages and Components From The installation method	Tasks to complete
				functionality is the same. 3. Rename your My Tickets Page and Add the Service Catalog Tab to the Naviagation Menu on page 163 4. Publish Your Employee Workspace Site on page 168
New customer with version 9.2 and later	Employee Service	Metadeploy	• Home, Knowledge Article, and My Support Tickets Pages and Components • Service Catalog Pages and Components	1. From Workspaces: Verify your Employee Workspace Administration Settings on page 136 2. From the Digital Experiences Site Builder: Verify the Employee Concierge and Service Catalog Pages and Components Installation on page 137 3. Add the My Support Tickets and Service Catalog Tabs to the Navigation Bar 4. Publish Your Employee

Customer type Defined by Employee Concierge Version	Template Used	Installation Method	Pre-Setup pages and Components From The installation method	Tasks to complete
				Workspace Site on page 168
Existing or new customer with any version of Employee Concierge who creates an additional community	Employee Service Tip: We recommend that you use the Employee Service template to benefit from the automated setup.	Manual creation from Salesforce Setup	• Home, Knowledge Article, and My Support Tickets Pages and Components • Service Catalog Pages and Components	1. From Workspaces: Set Your Employee Workspace Administration Settings on page 136 2. From the Digital Experiences Builder: Verify the Employee Concierge and Service Catalog Pages and Components Installation on page 137 3. Add the My Support Tickets and Service Catalog Tabs to the Navigation Bar on page 163 4. Publish Your Employee Workspace Site

Warning: Be sure to complete all the steps in the Help topics that follow, and then publish your Workspace site to save the changes. We recommend that you deactivate your community in the administration settings of your Employee Workspace Community before you begin. We also recommend completing the setup without interruption. If you must stop before completing all steps, publish your changes before leaving the Digital Experiences site builder.

1. Set Your Employee Workspace Administration Settings
   Configure and review the administration settings for your Employee Workspace site.
2. Verify the Employee Concierge and Service Catalog Pages and Components Installation
   From the Experience Builder, confirm that the Employee Concierge and Service Catalog pages and components were installed successfully.

3. Add Service Catalog Pages and Components to Your Employee Workspace Site
   Create the Service Catalog and My Service Catalog Request pages and components in your Employee Workspace Site using the Digital Experiences site builder.
4. Add the Support Tickets and Service Catalog Components to Your Workspace Home Page
   Add the Featured Catalog, My Service Catalog Requests, and My Support Tickets components to your Employee Workspace home page to provide your employees quick and up-to-date access to these resources.
5. Add the My Support Tickets and Service Catalog Tabs to the Navigation Bar
   Add the Service Catalog, My Service Catalog Requests, and My Support Tickets tabs to the navigation bar of your Employee Workspace site to provide your employees access these resources..
6. Optimize Ticket Attachments with the Attachments Component
   Add the Attachment component to the My Support Tickets Page and the IT Case Page Layout to attach files to a ticket or edit a list of files attached to a ticket. If you deployed Employee Concierge using package version 7 or earlier, update your package to benefit from ticket attachments. If you deployed Employee Concierge using version 8 or later, no action is needed.
7. Publish Your Employee Workspace Site
   Publish your site to save the pages and components you've set up in your Employee Workspace site.
8. Add Custom and Standard Fields to the Employee Concierge Ticket Details Field Set
   Add custom or standard fields that you want to appear in the ticket details component of the My Support Tickets page.

Set Your Employee Workspace Administration Settings

Configure and review the administration settings for your Employee Workspace site.

Customer Steps to complete Defined by Employee Concierge Version

Existing customer with version 8.6 and later with Service Catalog	No action is needed. Proceed to Add Service Catalog Pages and Components to Your Employee Workspace Site.
Existing customer with version 8.6 and later without Service Catalog	No action is needed. Proceed to: **1.** Optional: Add the My Support Tickets List to Your Home Page (step 6) Note: Adding the My Support Tickets List component to your home page is optional as your Employee Workspace site already has this component. The component name is changed as of Employee Concierge version 9.2. Its functionality is the same. **2.** Rename your My Tickets page (step 5)
New customer with version 9.2 and later	Review the steps to verify that your preset administration settings match the steps.
Existing or new customer with any version of Employee Concierge who creates an additional community	Take the steps to set the administration settings for your community.

1. From Setup, in All Sites, select **Workspaces** next to the name of your Employee Workspace Community.
2. From Workspaces, select **Administration**.

3. Set your Community preferences.
   a. From the left-hand navigation menu, select **Preferences**.
   b. Under General, deselect **Show nicknames**.
   c. Save your updates.
4. Set your Members preferences.
   a. From the left-hand navigation menu, select **Members**.
   b. From Available Permission Sets, under Select Permission Sets, select **Employee Workspace User**, and then click **Add**.
   c. Save your updates.
5. Set your Login & Registration preferences.
   a. From the left-hand navigation menu, select **Login & Registration**.
   b. From the Login Page Type dropdown, under Login Page Setup, select **Experience Builder Page**.

      Note: You can choose to set Login Page Type to **Default Page**.

   c. Ensure that **Allow employees to log in directly to an Experience Cloud Site** is selected.
   d. Save your updates.

Next, open the Digital Experiences Builder to verify the Employee Concierge and Service Catalog Pages and Components Installation on page 137

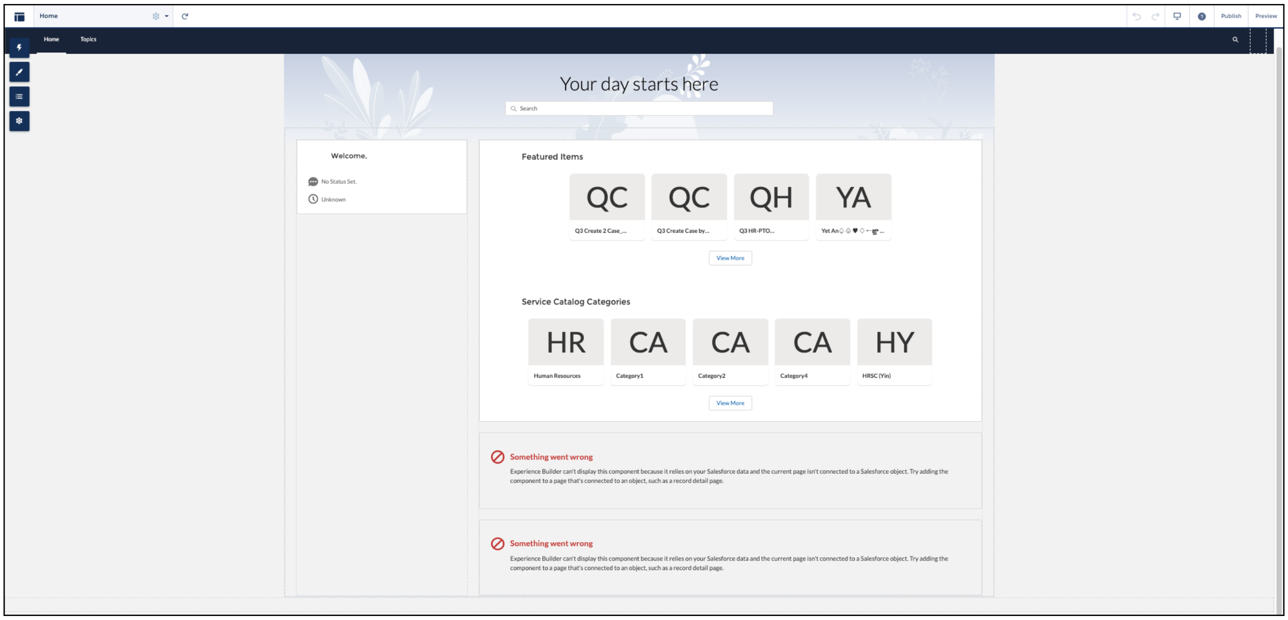
Verify the Employee Concierge and Service Catalog Pages and Components Installation

From the Experience Builder, confirm that the Employee Concierge and Service Catalog pages and components were installed successfully.

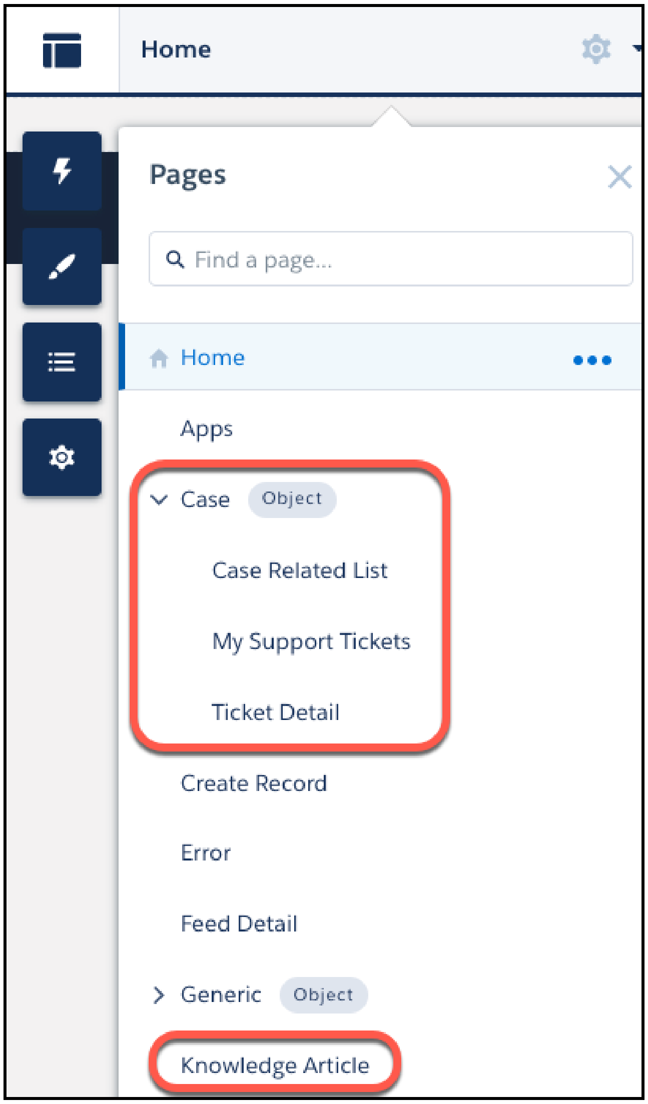
Important: Be sure that you complete the steps only if you have the Employee Service template. In addition, make sure you've set your Employee Workspace administration settings on page 136.

1. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites**.
2. Next to the name of your Employee Workspace site, click **Builder**.
3. From the Experience Builder home page, verify that you see these components in the Builder Canvas:
   - Featured Catalogs
   - My Support Tickets List
   - Concierge New Ticket Form
   - Employee Lite Profile
   - Request List

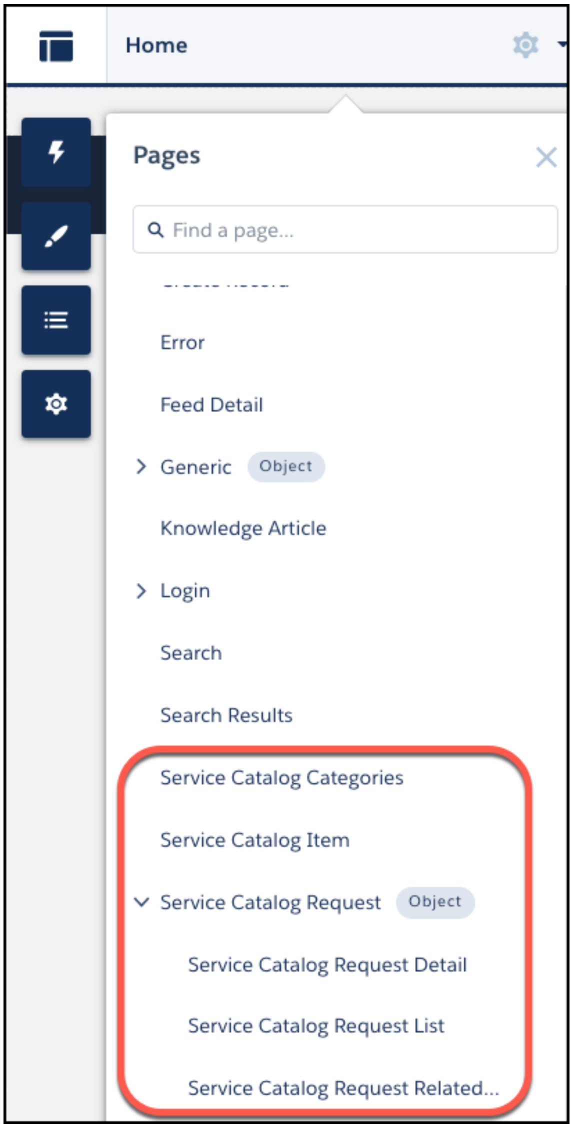
   Tip: To see the component name, hover your cursor over each component in the Experience Builder Canvas.



4. To open the Pages dropdown, click .
5. Confirm that you see `Knowledge Article` and the layout for the Case object indicated in the image.



6. Confirm that you see this layout for the Service Catalog pages indicated the image.



After you complete the steps, review the table to determine what to complete next.

Customer type Defined by Employee Concierge Version	Task to Complete
Existing Customer with version 8.6 and later with Service Catalog	Add Service Catalog Pages and Components to Your Employee Workspace Site
Existing Customer with version 8.6 and later without Service Catalog	1. Optional: Add the My Support Tickets List to Your Home Page (step 6) Note: Adding the My Support Tickets List component to your home page is optional as your Employee Workspace site already has this component. The component name is changed as of Employee Concierge version 9.2. Its functionality is the same.

Customer type Defined by Employee Concierge Version	Task to Complete
	2. Rename your My Tickets Page (step 5)
• New Customer with version 9.2 and later • Existing or new customer with any version of Employee Concierge who creates an additional community	Add the My Support Tickets and Service Catalog Tabs to the Navigation Bar Important: If you don't have an Employee Productivity Plus permission set license or the ITSC Endpoint add-on, you can access the Service Catalog pages and components in the Digital Experiences site builder. But in your published Employee Workspace Community, only the Employee Concierge pages and components are available to you.

Add Service Catalog Pages and Components to Your Employee Workspace Site

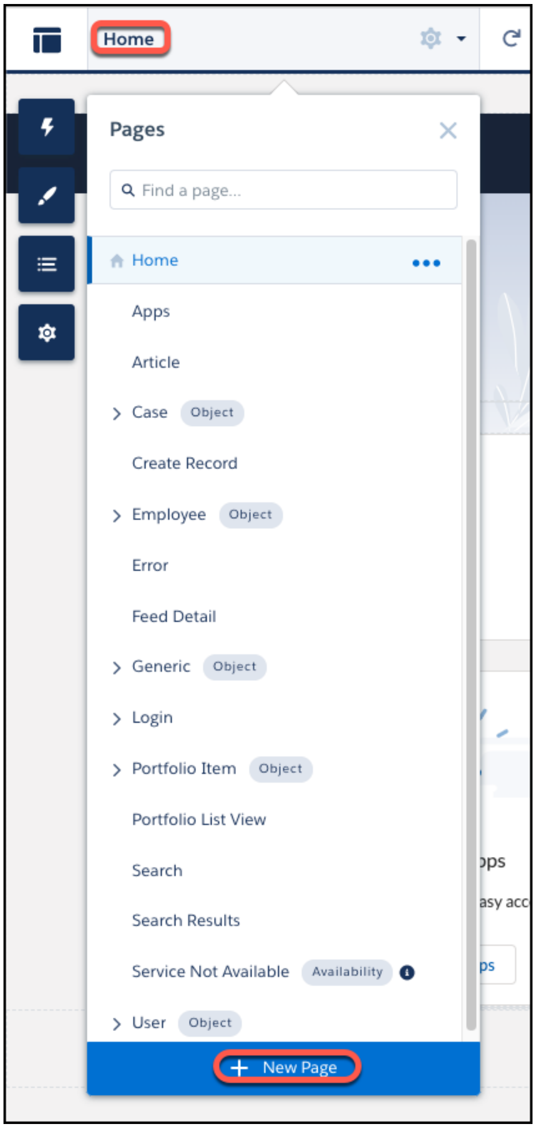
Create the Service Catalog and My Service Catalog Request pages and components in your Employee Workspace Site using the Digital Experiences site builder.

Several Digital Experience pages make up the Service Catalog and My Service Catalog Request pages. Create these pages using the Digital Experiences site builder.

1. Service Catalog Request Detail
2. My Service Catalog Request Details
3. My Service Catalog Request List
4. Service Catalog Categories
5. Service Catalog Item

The steps take you through creating each page in the listed order. Be sure to create each page in its listed order as it properly generates the Service Catalog and My Service Catalog Request page's in your Employee Workspace site.

1. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites**.
2. Next to the name of your Employee Workspace site, click **Builder**.
3. Create the Service Catalog Request Detail page.
    a. From the Home dropdown, select **+ New Page**.



b. In the New Page window, set these configurations in the workflow.

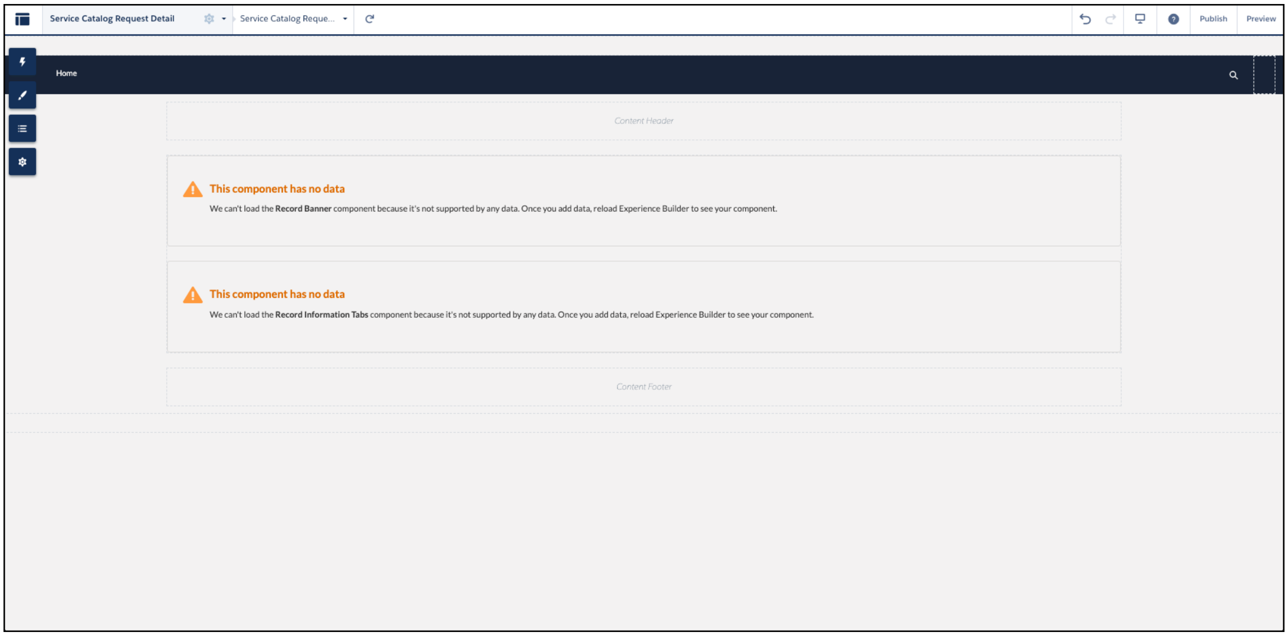
   a. Select **Object Pages**.

   b. In the search box, enter `Service Catalog`, and select **Service Catalog Request**.

   c. Click **Create**.

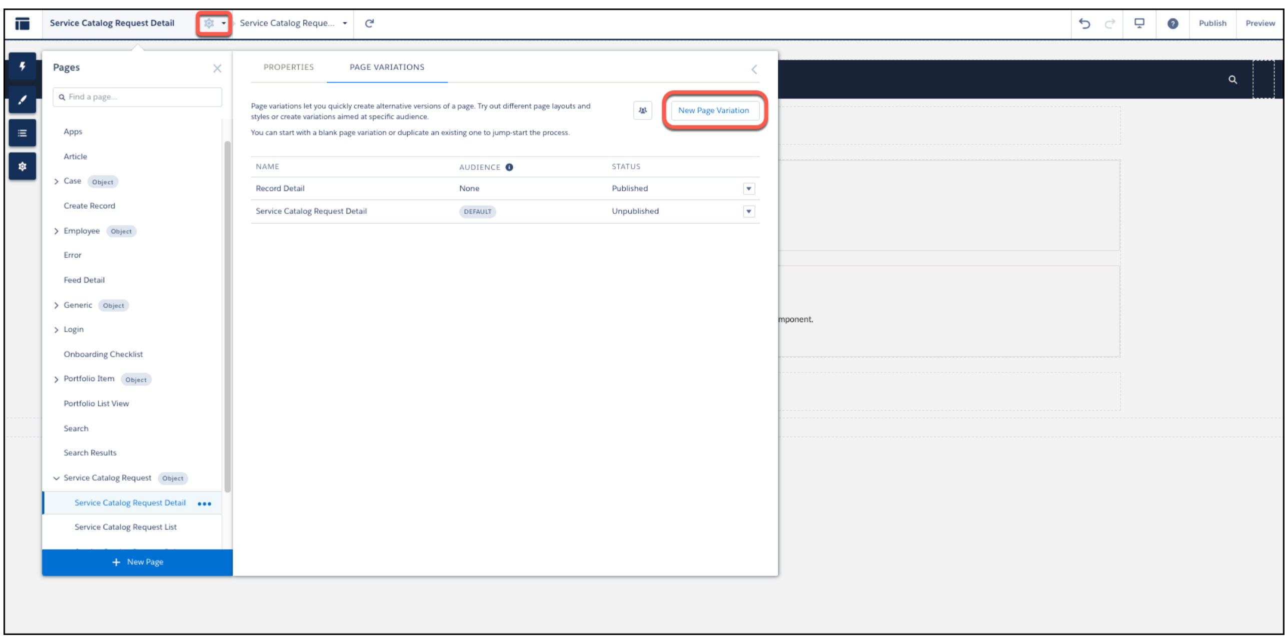
   d. From the page description for the New Object Page, click **Create**.

   The New Page window closes, and the Service Catalog Detail page opens.



4. Create the My Service Catalog Request Details page variation.

   a. Click , and from the Page Variations menu, click **+ New Page Variation**.



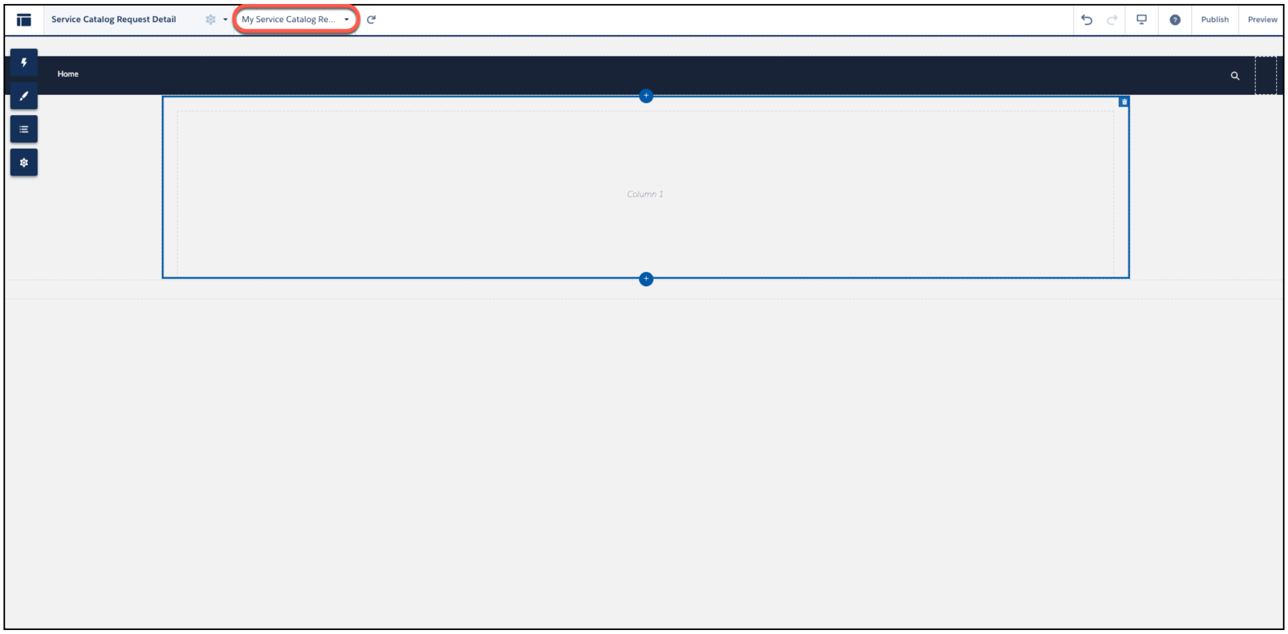
   b. From the New Page Variation window, set these configurations in the workflow.

      a. Select **Flexible Layout**, and then click **Next**.

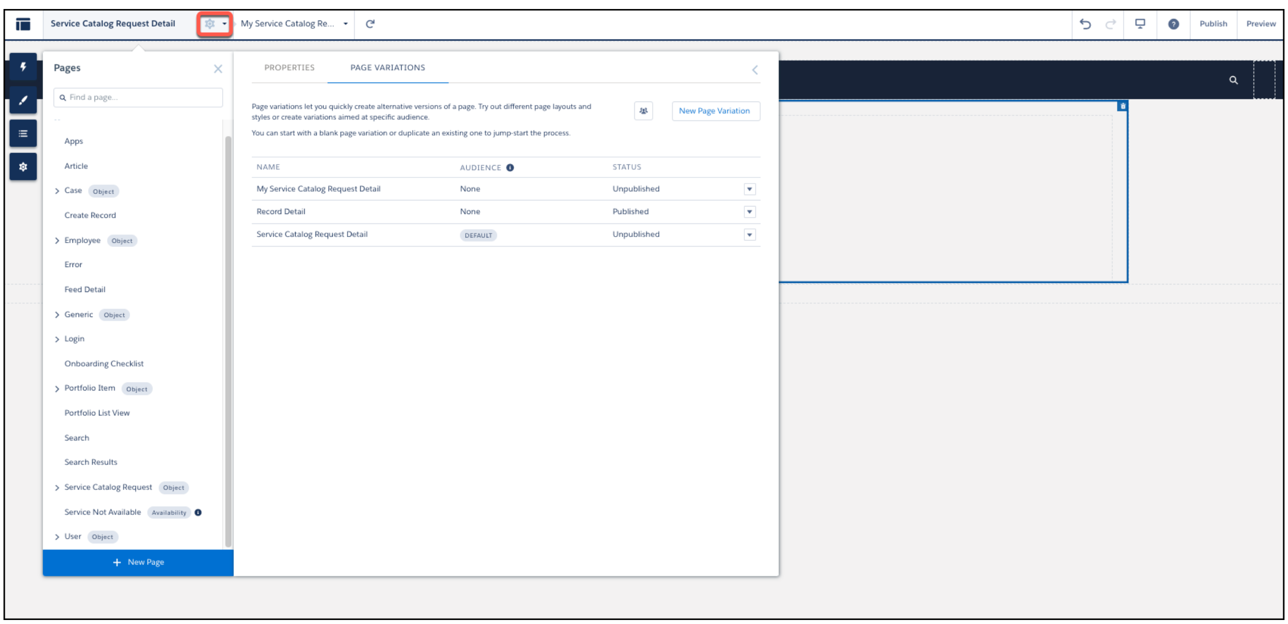
      b. Name the page `My Service Catalog Request Detail`.

      c. Click **Create**.

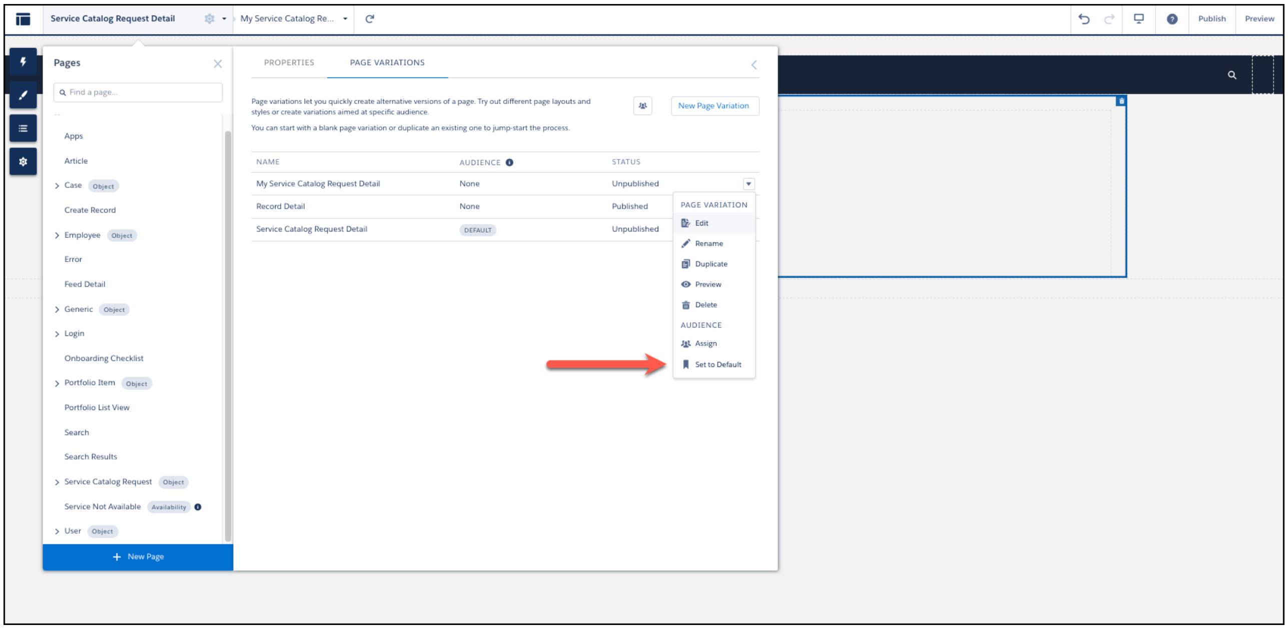
   The New Page Variation window closes, and the My Service Catalog Request Details page variation opens.



c. Click to open the Page Variations menu.

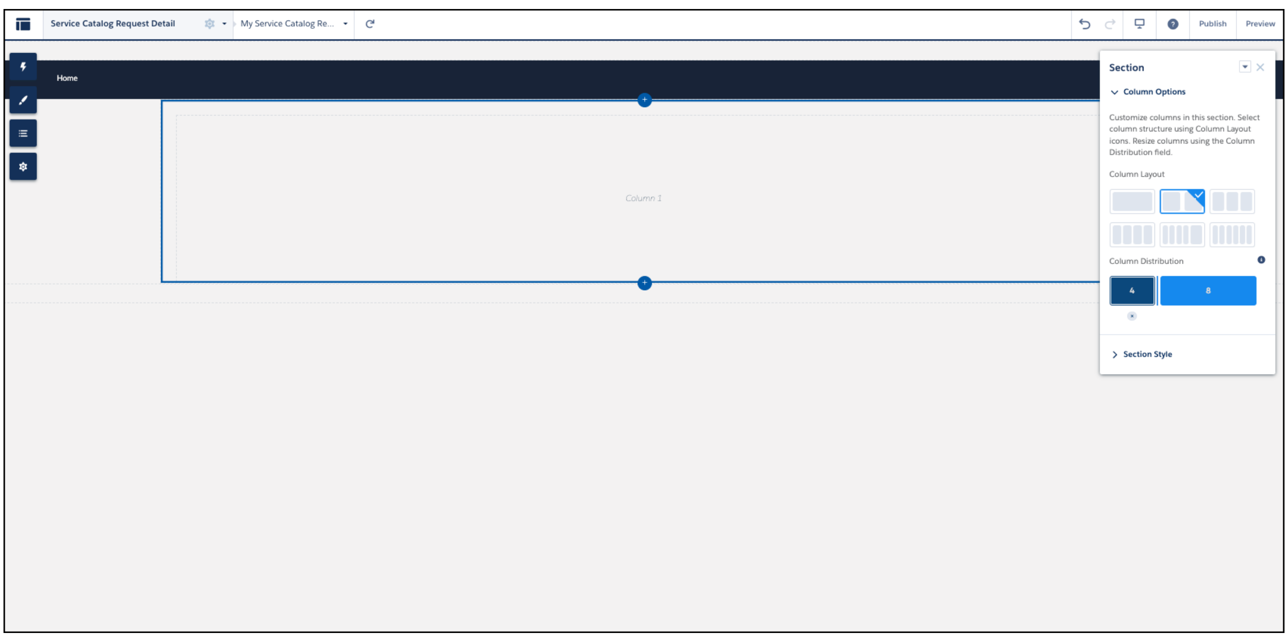


d. From the My Service Catalog Request Detail dropdown, select **Set to Default**.



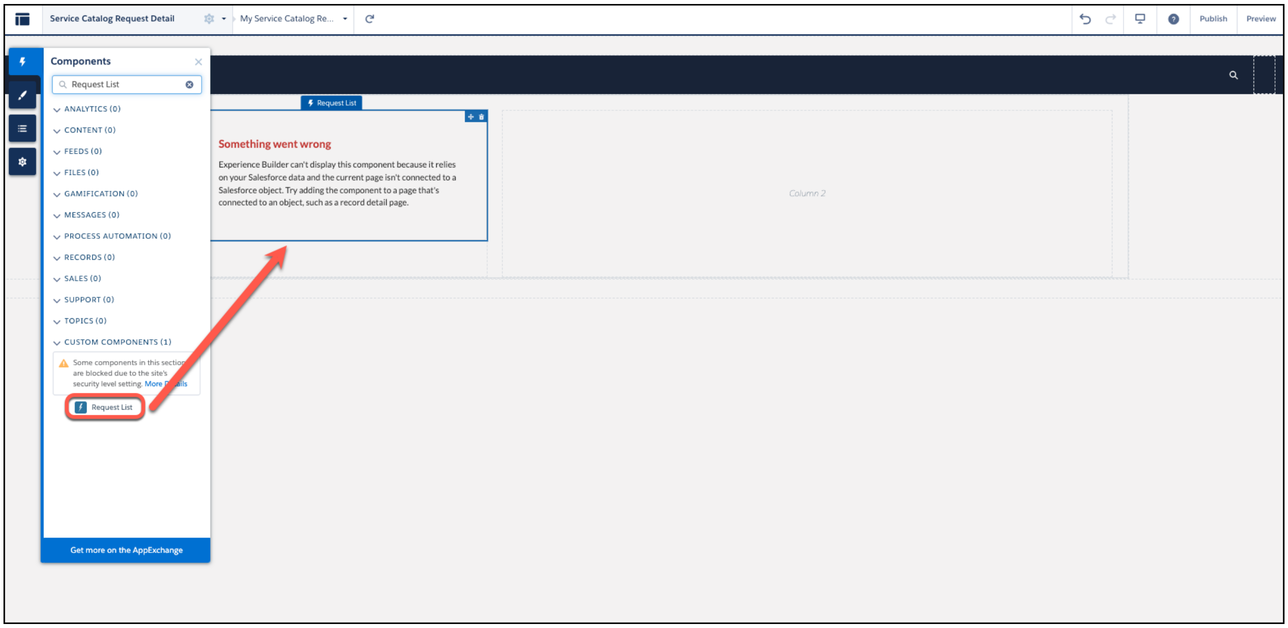
e. From the Experience Builder canvas, assign a double column layout and a column distribution of four columns on the left and eight columns on the right.

To set the column distribution, move the column divider to the left of the preset distribution.



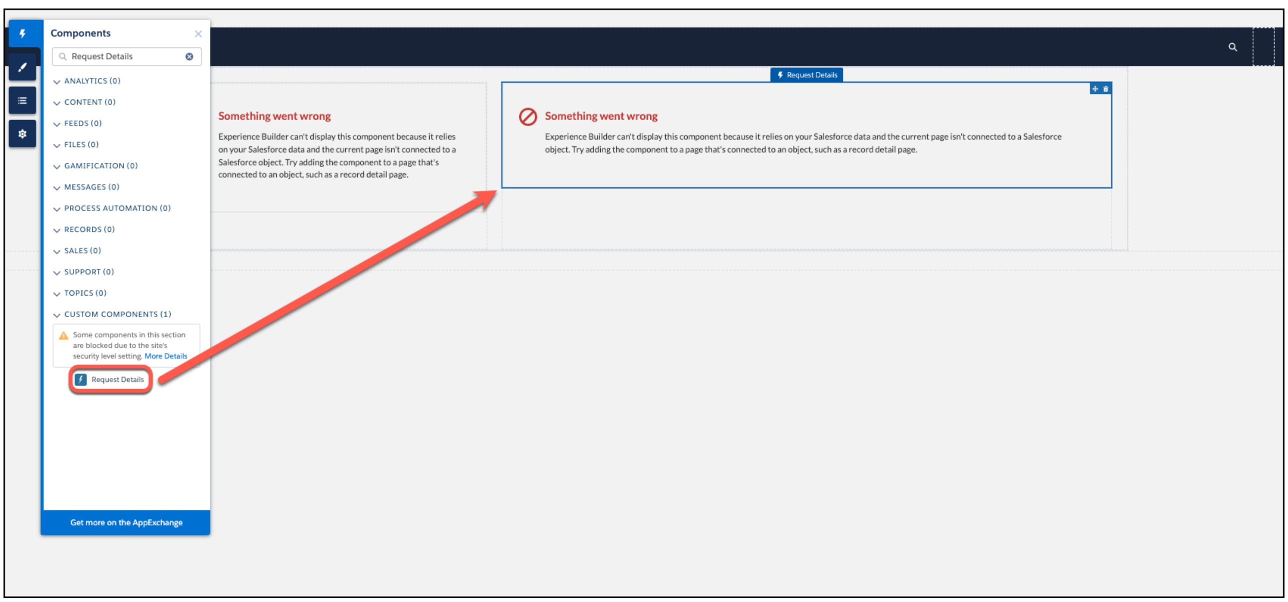
f. Click on the left side bar, and enter `Request List` in the Components search box.

g. Select **Request List** and place it on the left side of the builder canvas.

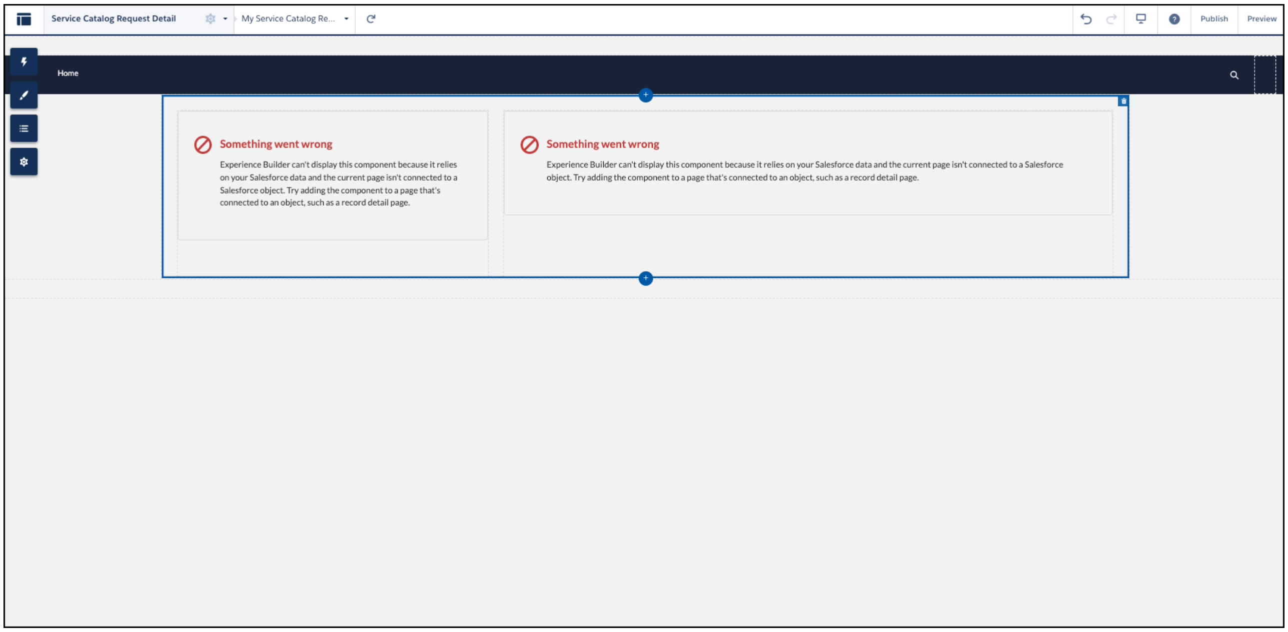


h. Click on the left side bar, and enter `Request Details` in the search box.

i. Select **Request Details** and place it on the right side of the builder canvas.

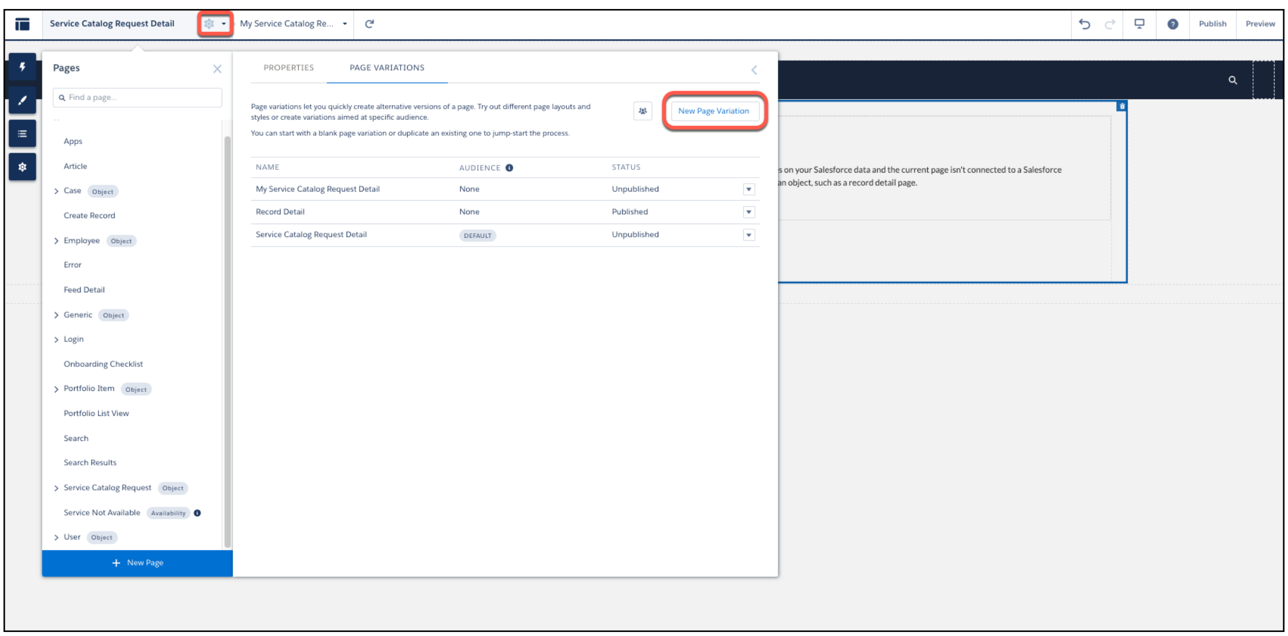


Your set up of the My Service Catalog Request Detail page variation is complete.



5. Create the My Service Catalog Request List page variation.

   a. Click [gear icon], and from the Page Variations menu, click **+ New Page Variation**.



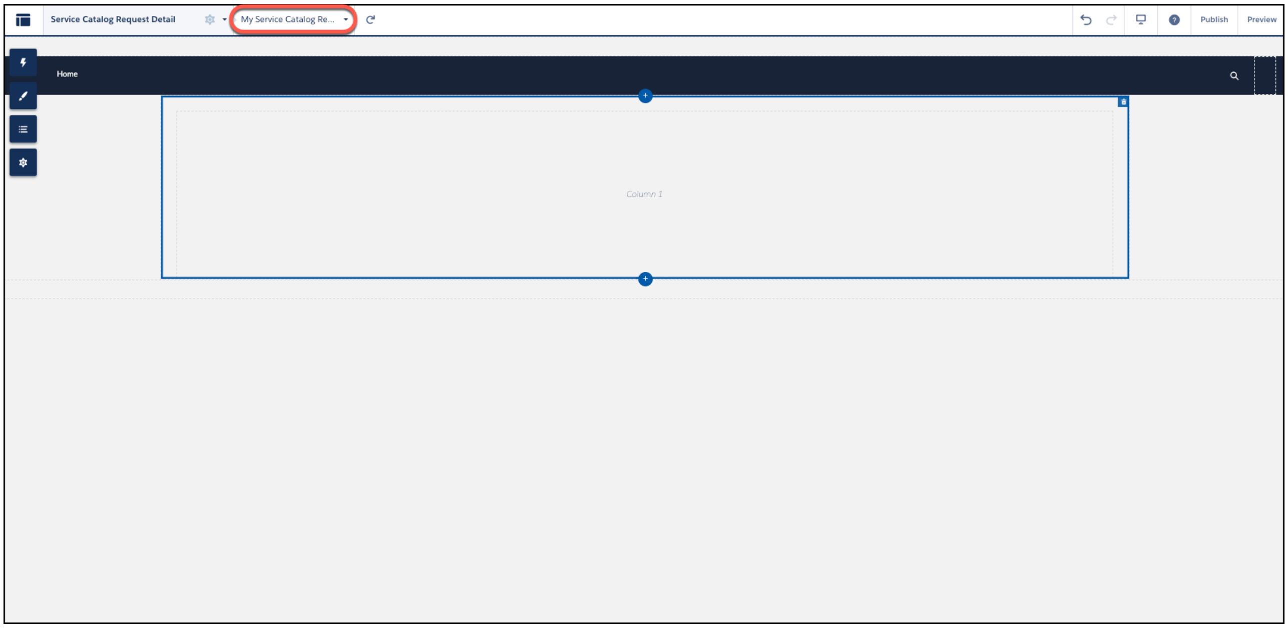
   b. In the New Page Variation window, set these configurations in the workflow.

      a. Select **Flexible Layout**, and click **Next**.

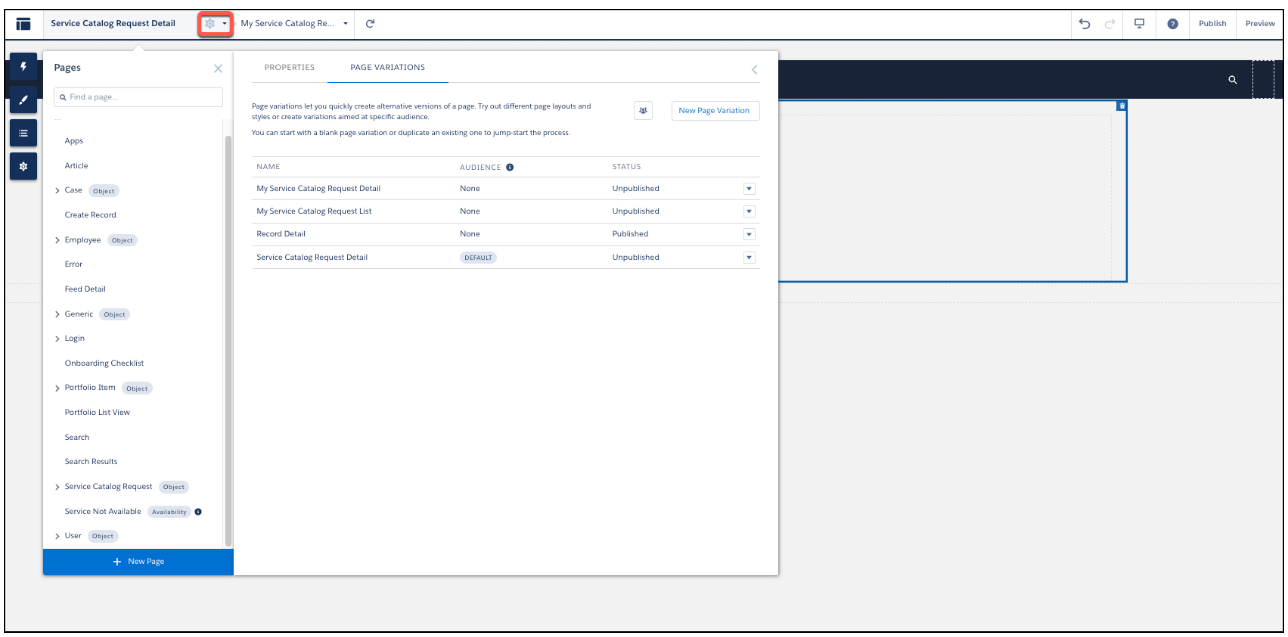
      b. For the page name, enter `My Service Catalog Request List`.

      c. Click **Create**.

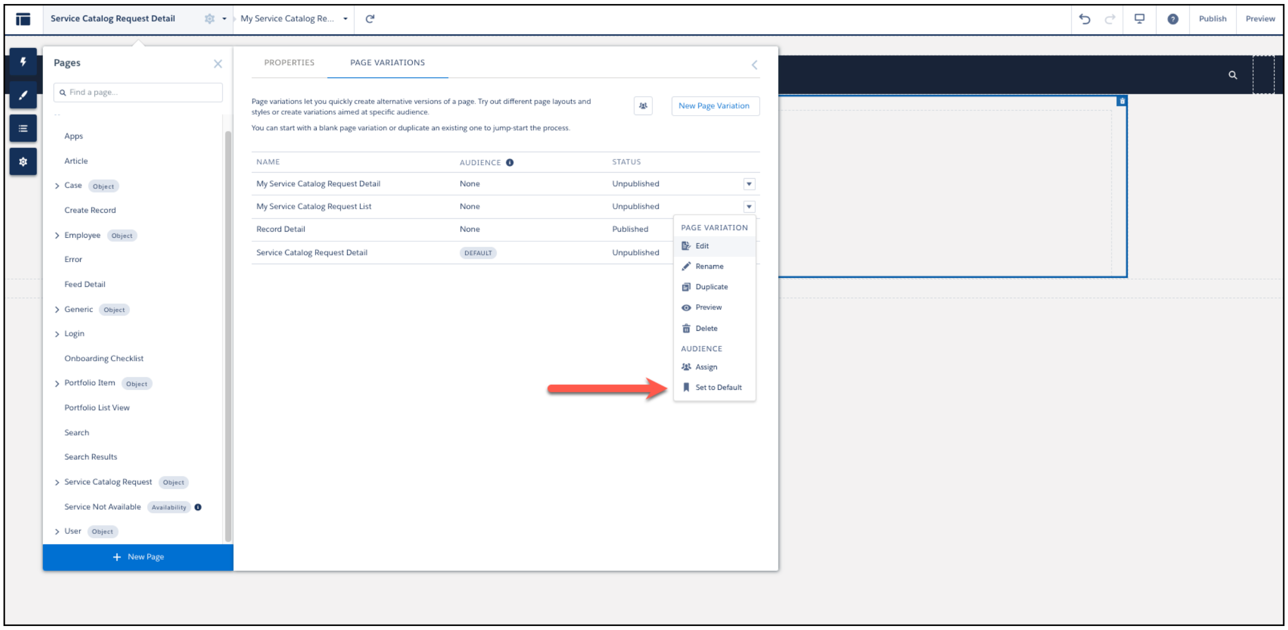
   The New Page Variation window closes, and the My Service Catalog Request List page opens.



c. Click to open the Page Variations menu.

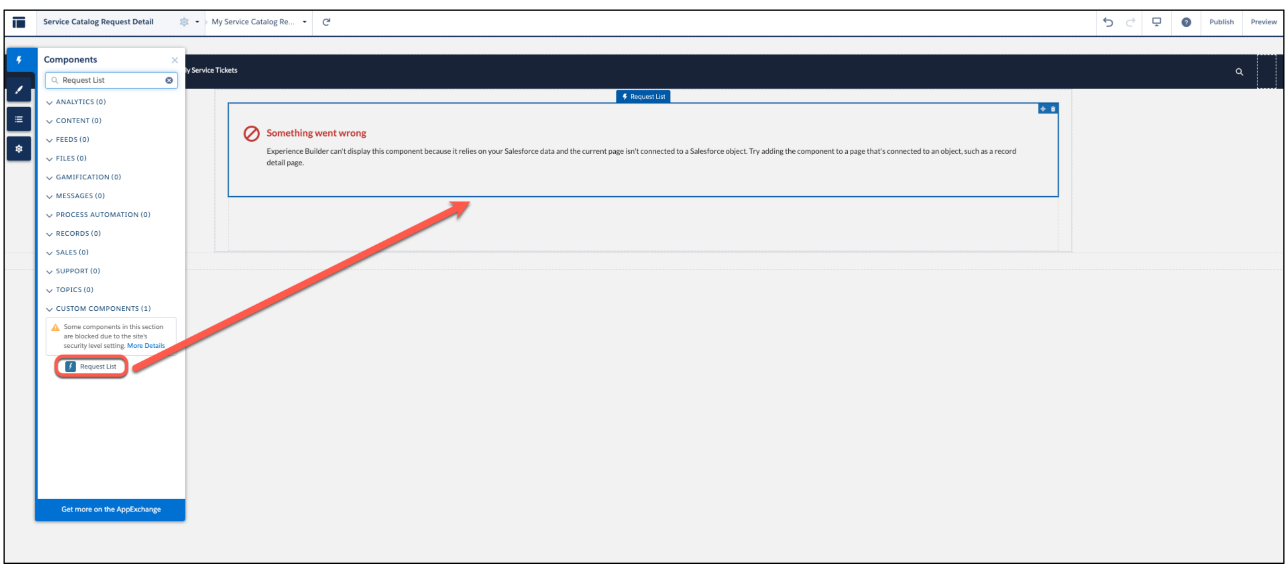


d. From the My Service Catalog Request List dropdown, select **Set to Default**.

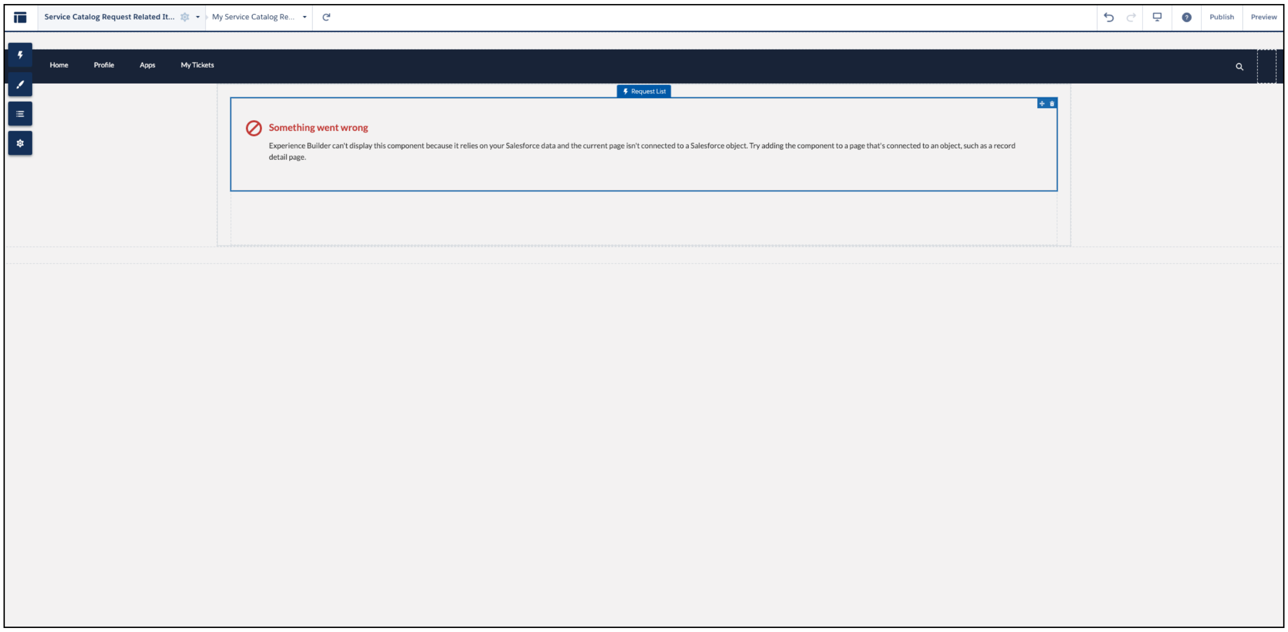


e. Click on the left side bar, and enter `Request List` in the Components search box.

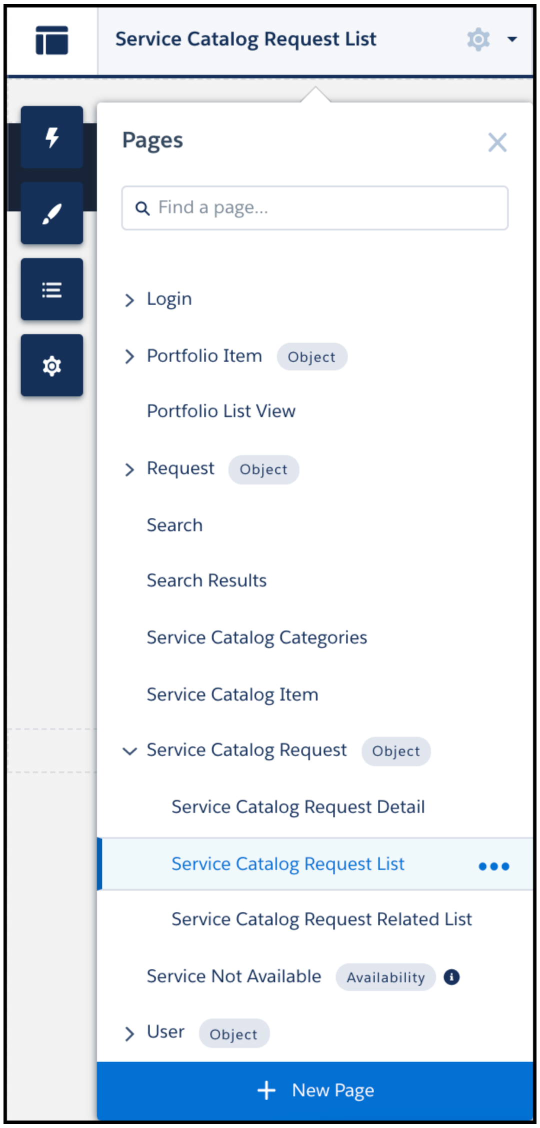
f. Select **Request List** and place it on the builder canvas.



Your set up of the My Service Catalog Request List page variation is complete.



6. Create the Service Catalog Categories page.
   a. Click **Service Catalog Request Detail** in the builder page menu, and then click **+ New Page**.



b. In the New Page window, set these configurations in the workflow.

a. Select **Standard Page**.

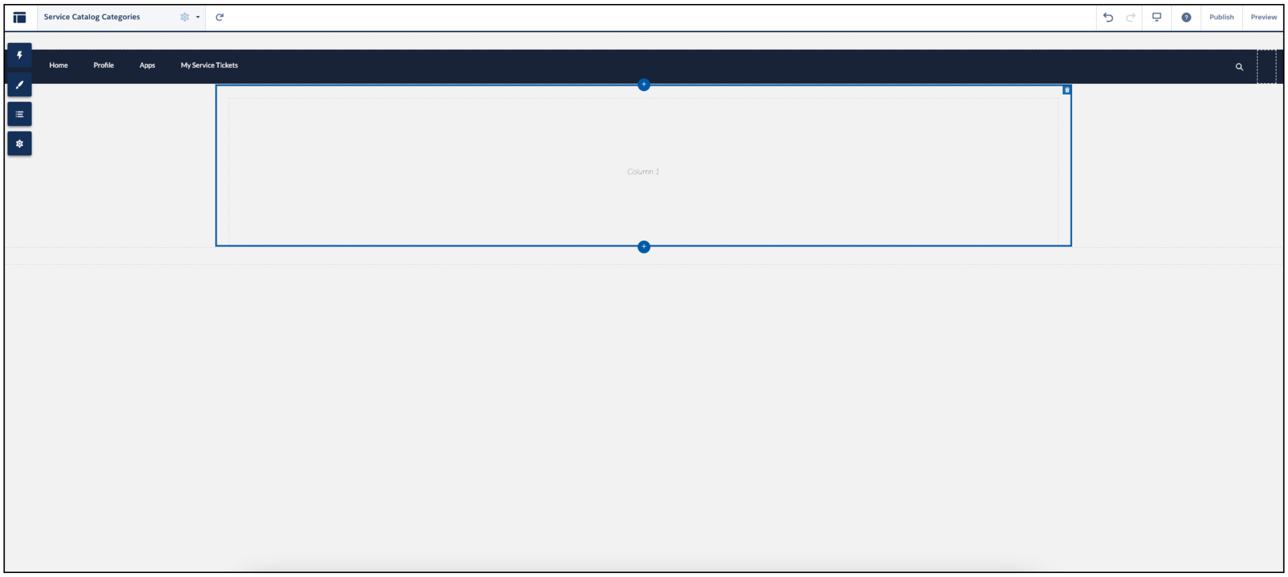
b. Click **+ New Blank Page**.

c. Select **Flexible Layout**, and click **Next**.

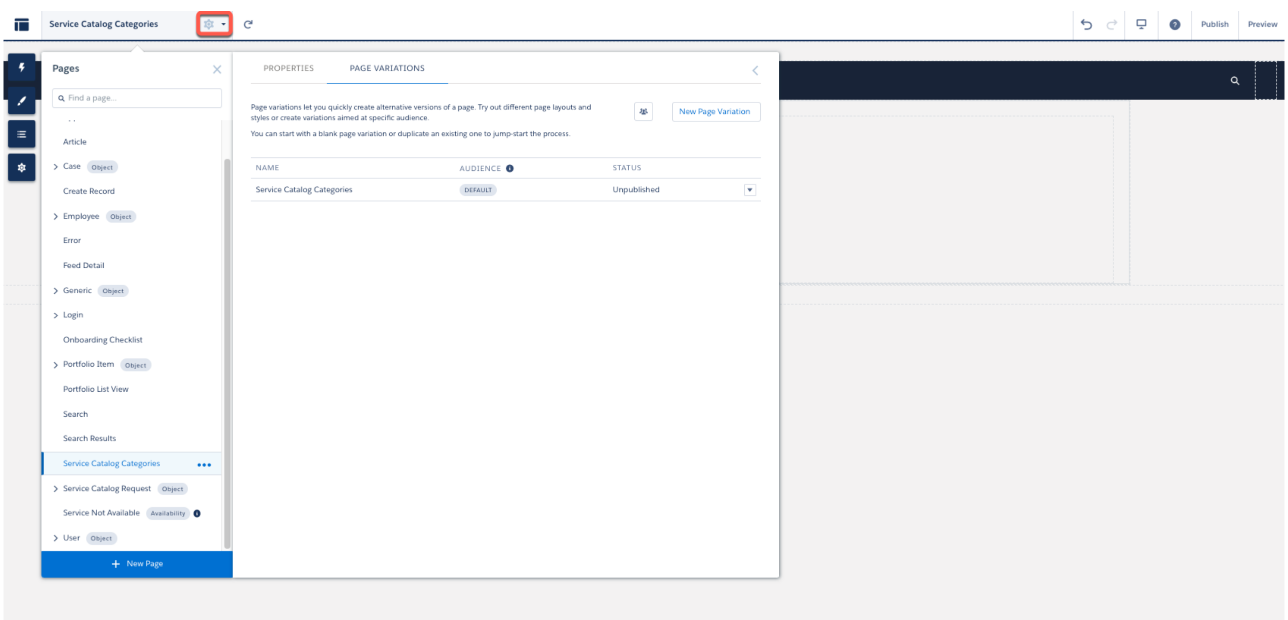
d. For the page name, enter `Service Catalog Categories`.

e. Click **Create**.

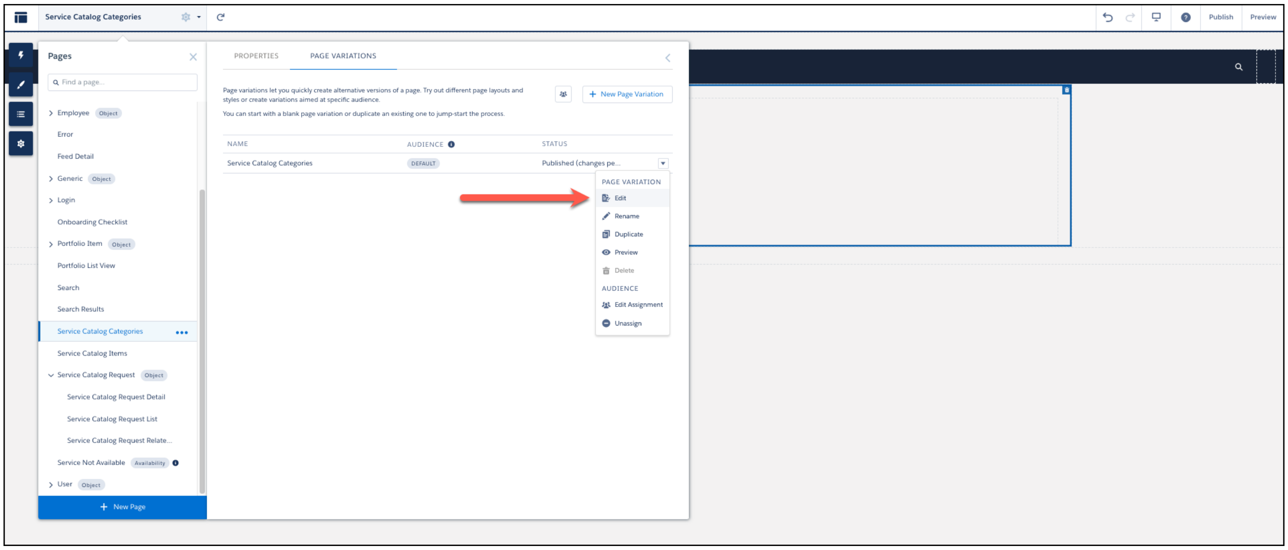
The New Page window closes, and the Service Catalog Categories page opens.



c. Click [icon] to open the Page Variations menu.



d. From the Service Catalog Categories dropdown, click **Edit**.

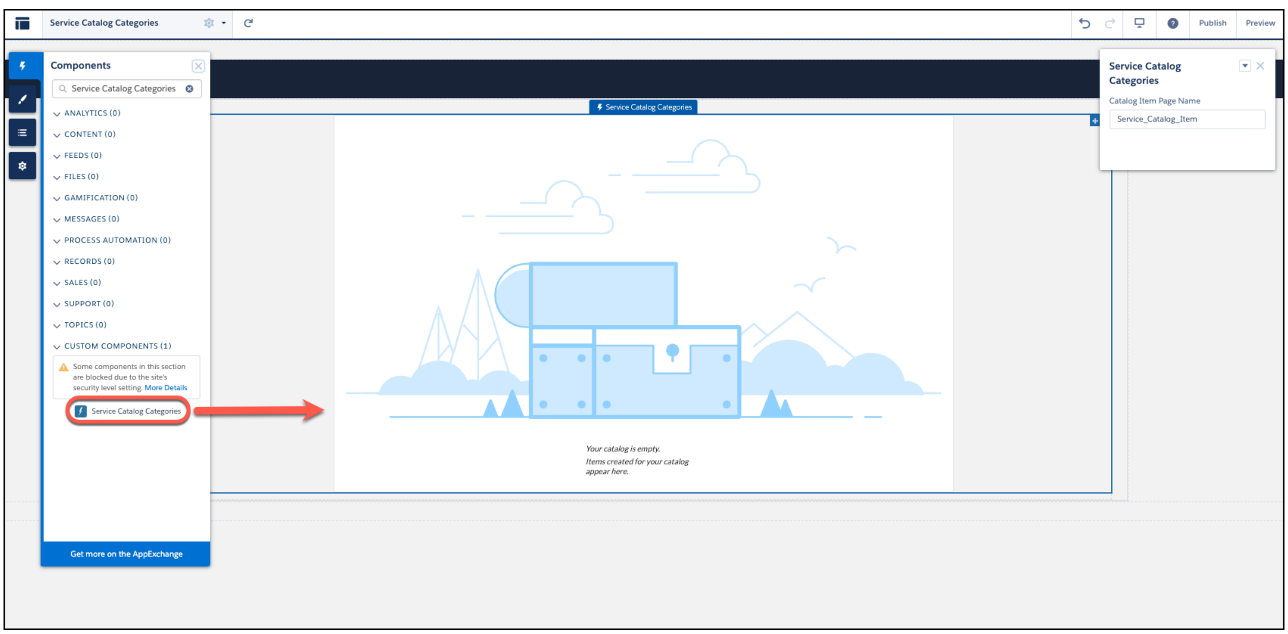


The Service Catalog Categories page refreshes.

e. Click

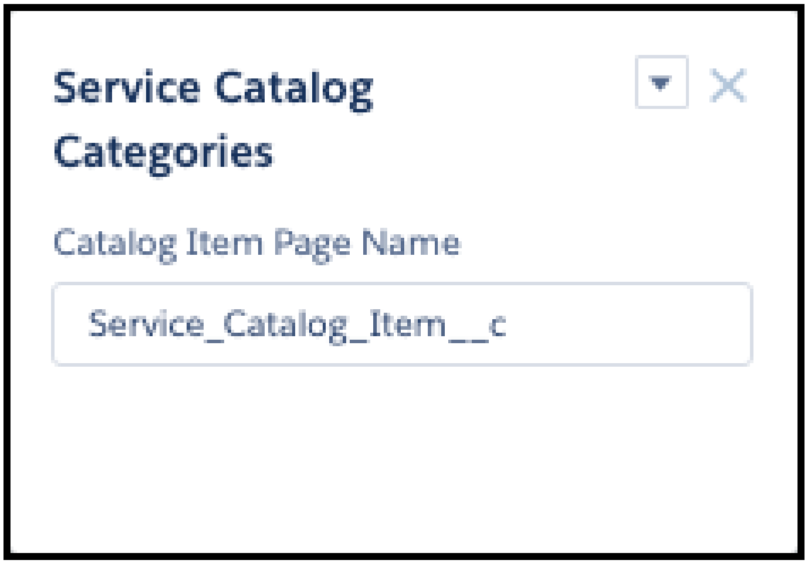
on the left side bar, and enter `Service Catalog Categories` in the Components search box.

f. Select **Service Catalog Categories** to place it on the builder canvas.

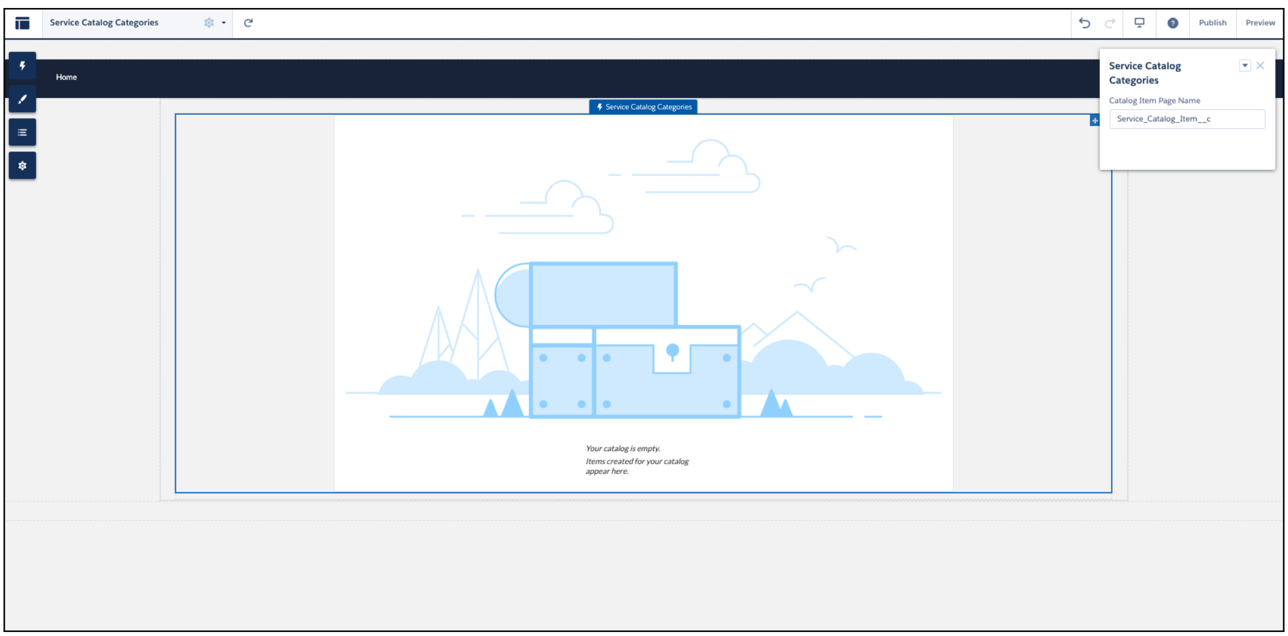


The Service Catalog Categories settings window opens in Digital Experience site builder. If it doesn't open, click the title of the component or refresh the page.

g. In the Service Catalog Categories settings window, enter `Service_Catalog_Item__c` for the Catalog Item Page Name.

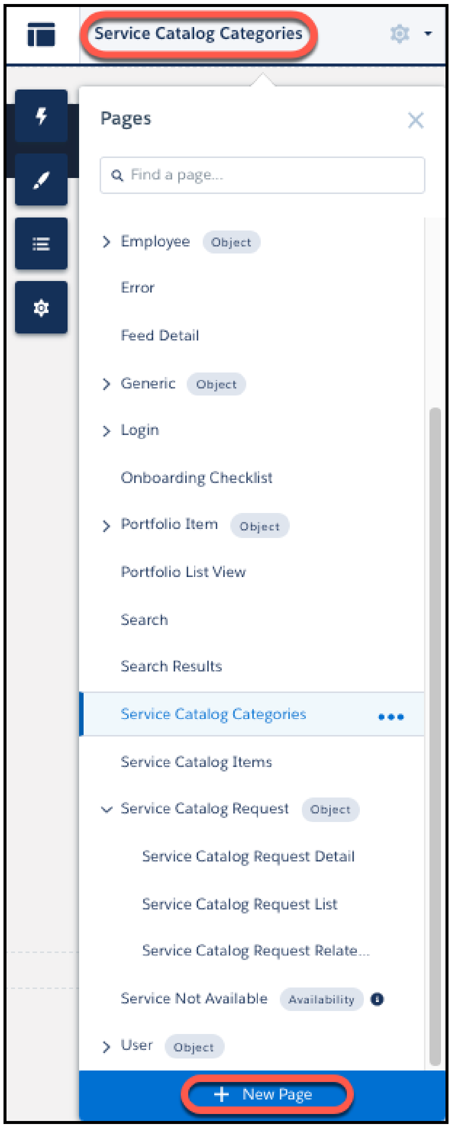


Your set up of the Service Catalog Categories page is complete.



7. Create the Service Catalog Item page.

   a. In the builder page menu, select **Service Catalog Categories**, and then click **+ New Page**.



b. In the New Page Variation window, set these configurations in the workflow..

  a. Select **Standard Page**.

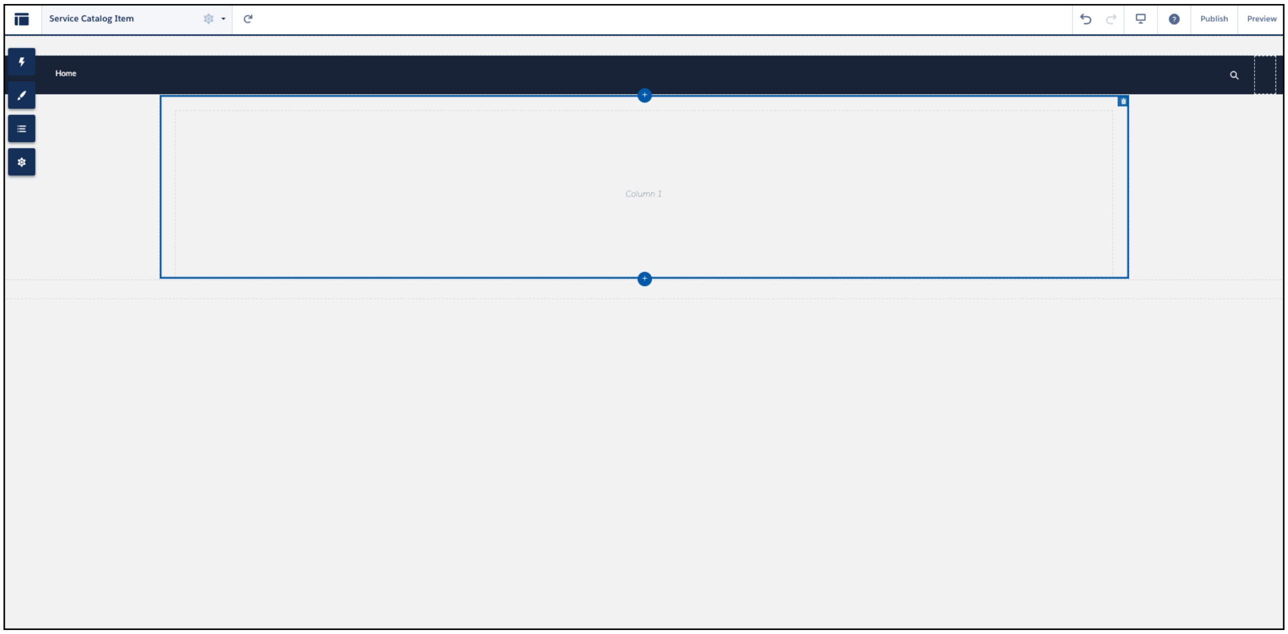
  b. Click **+ New Blank Page**.

  c. Select **Flexible Layout**, and click **Next**.

  d. Name your page `Service Catalog Item`.

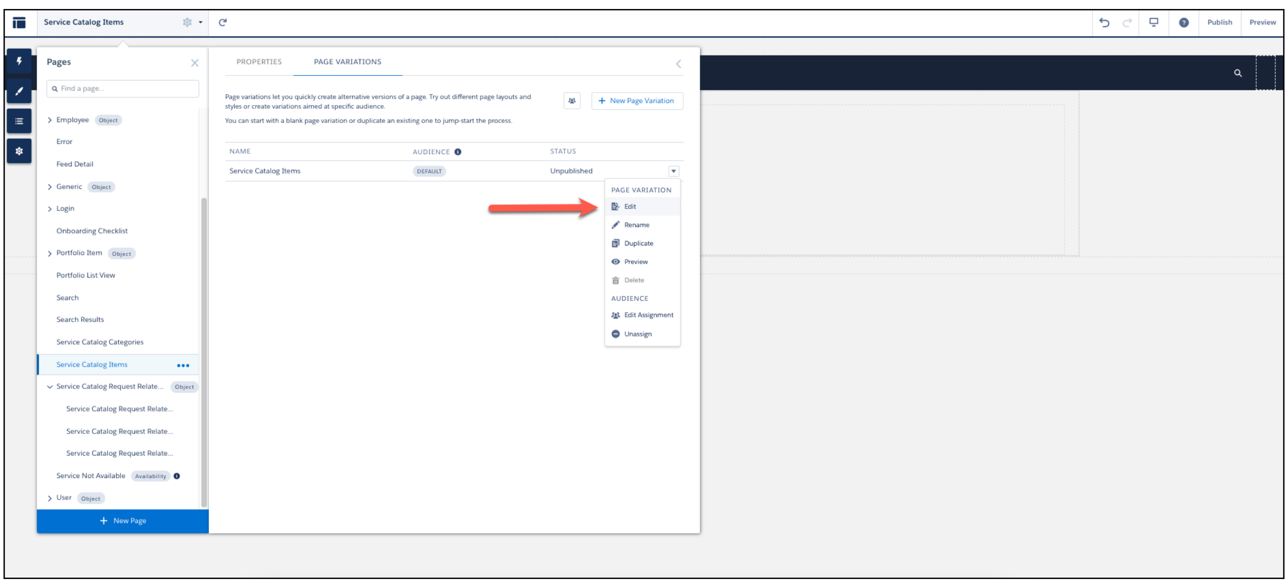
  e. Click **Create**.

  The Service Catalog Item page opens.



c. Click  to open the Page Variations menu.

d. In the Service Catalog Item dropdown, click **Edit**.

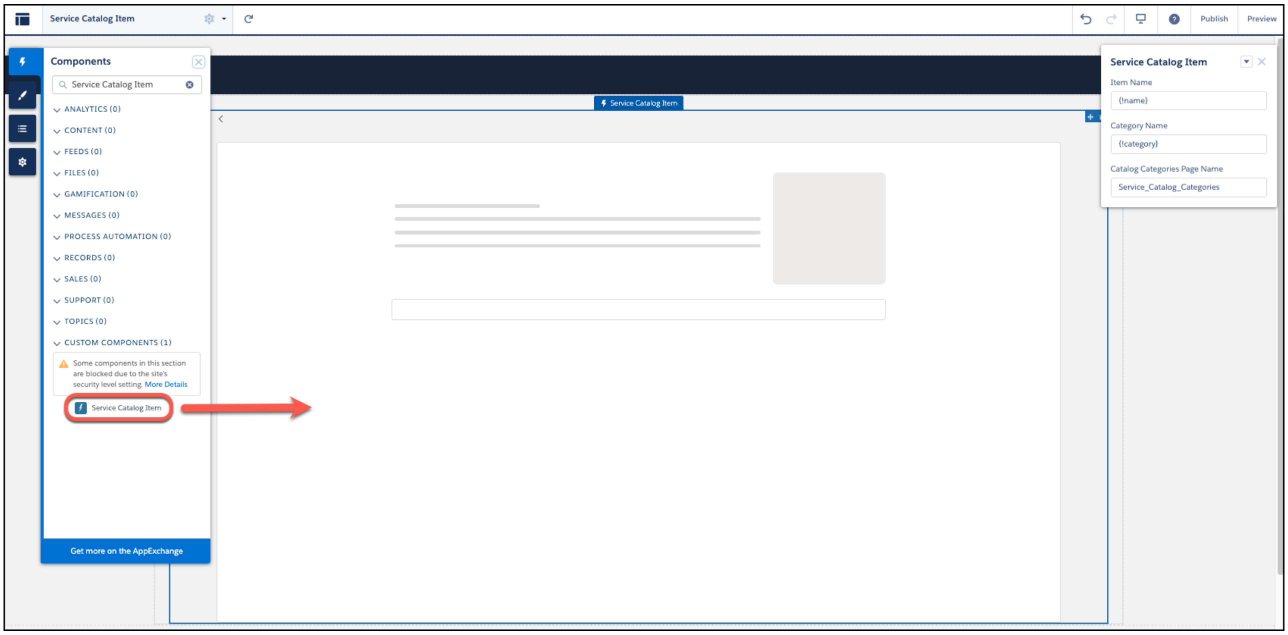


The Service Catalog Item page refreshes.

e. Click

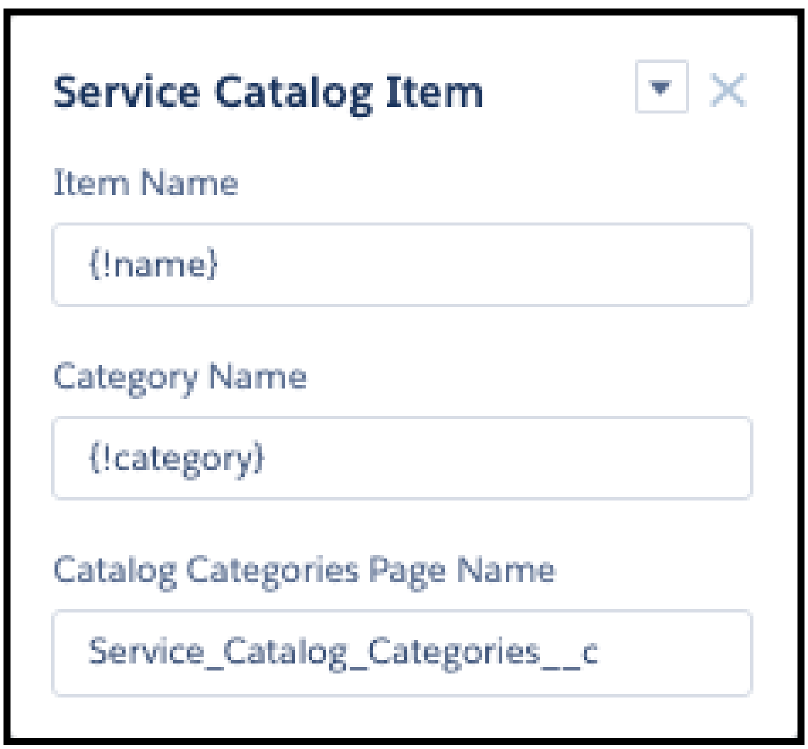
on the left side bar, enter `Service Catalog Item` in the Components search box.

f. Select **Service Catalog Item** and place it on the builder canvas.

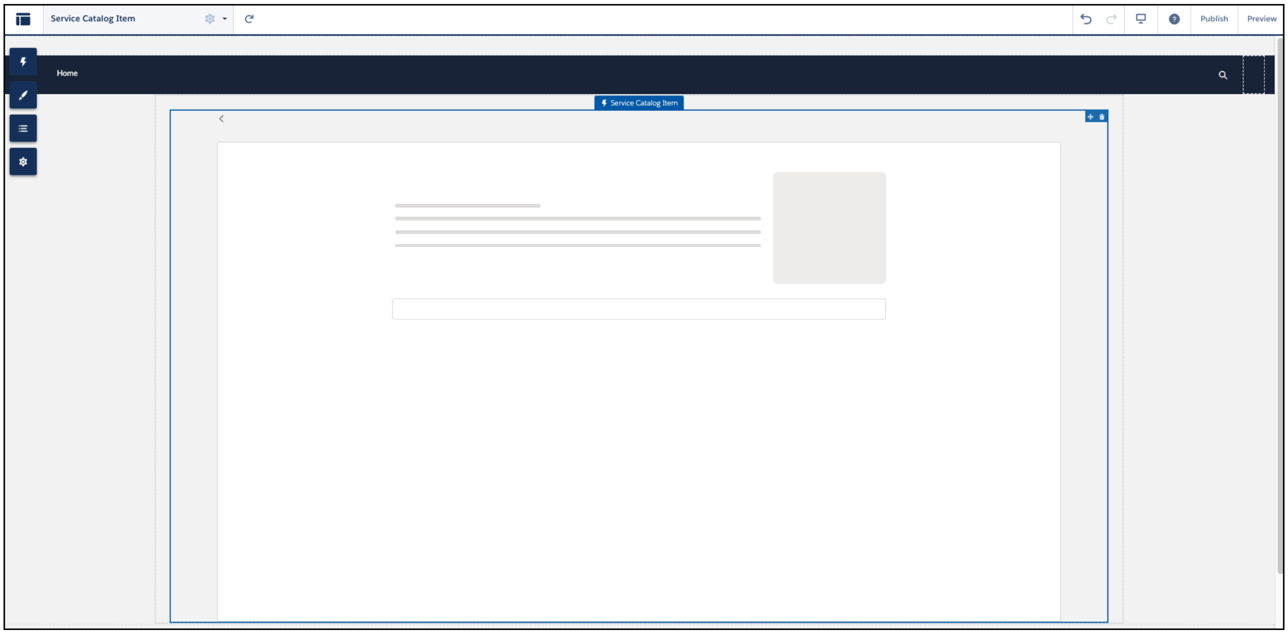


The Service Catalog Item settings window opens. If it doesn't open, click the title of the component or refresh the page.

g. In the Service Catalog Item settings window, enter `Service_Catalog_Categories__c` for Catalog Categories Page Name.



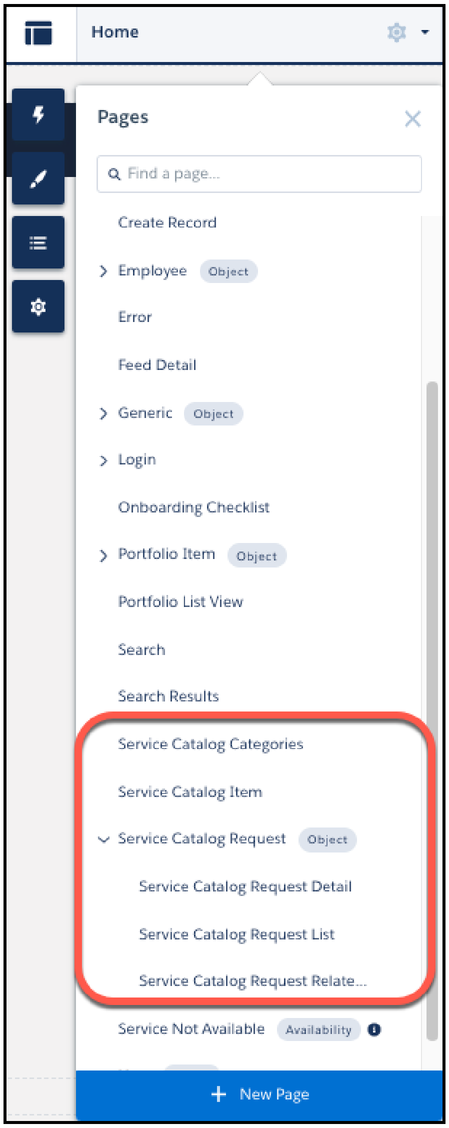
Your set up of the Service Catalog Item page is complete.



When you complete the steps, your setup of the Service Catalog pages, page variations, and components is complete. However, the pages don't show in the Digital Experience site builder until you add the pages to your Employee Workspace navigation bar on page 163.

To confirm your setup of your Service Catalog pages and page variations, check that the Pages dropdown lists the Digital Experience site pages you created.

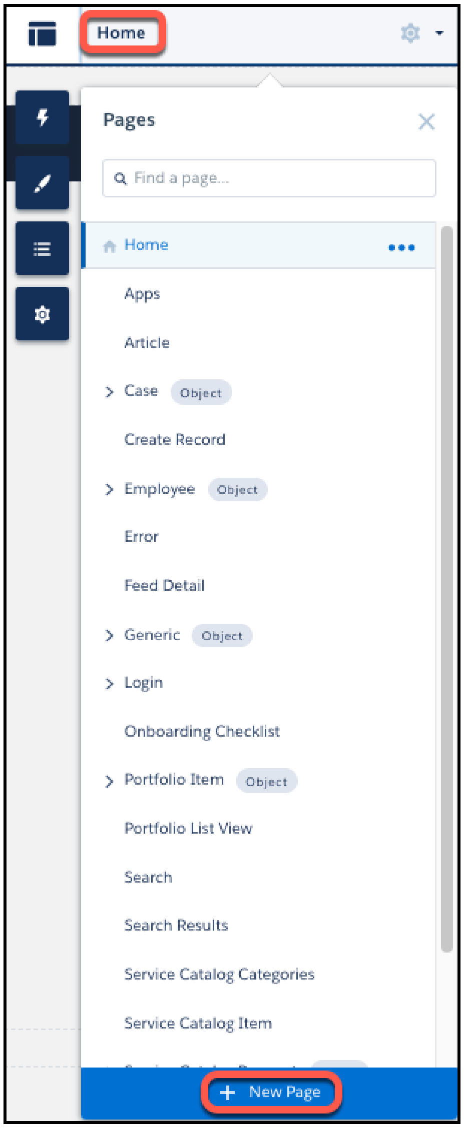
Example:



Add the Support Tickets and Service Catalog Components to Your Workspace Home Page

Add the Featured Catalog, My Service Catalog Requests, and My Support Tickets components to your Employee Workspace home page to provide your employees quick and up-to-date access to these resources.

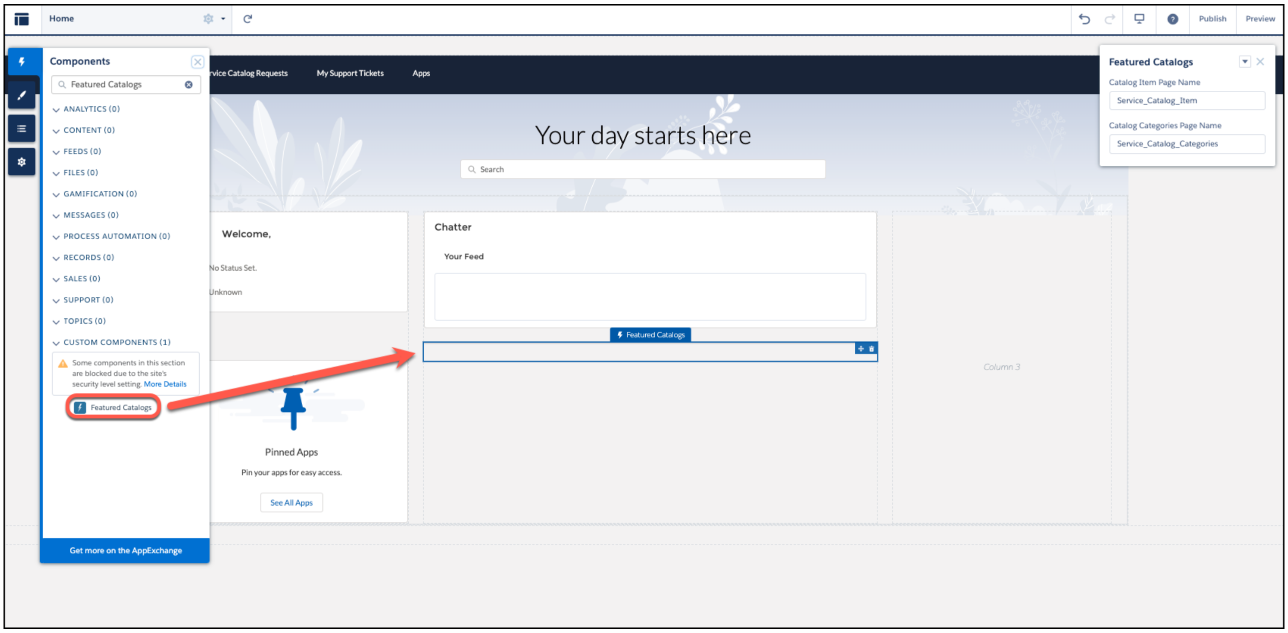
1. From Home, click **Home** in the builder page menu.



2. Click

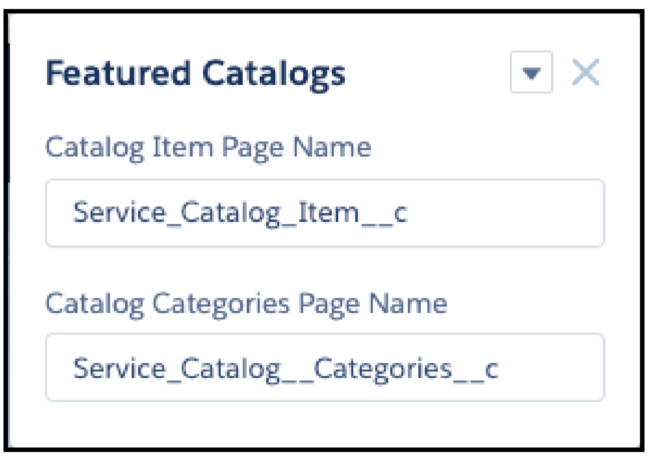
   

   on the left side bar, and enter `Featured Catalogs` in the search box.
3. Select **Featured Catalogs**, and place it on the center of the builder canvas under the Chatter Feeds component.



The Featured Catalogs window opens. If it doesn't open, click **Featured Catalog** in the builder canvas or refresh the page.

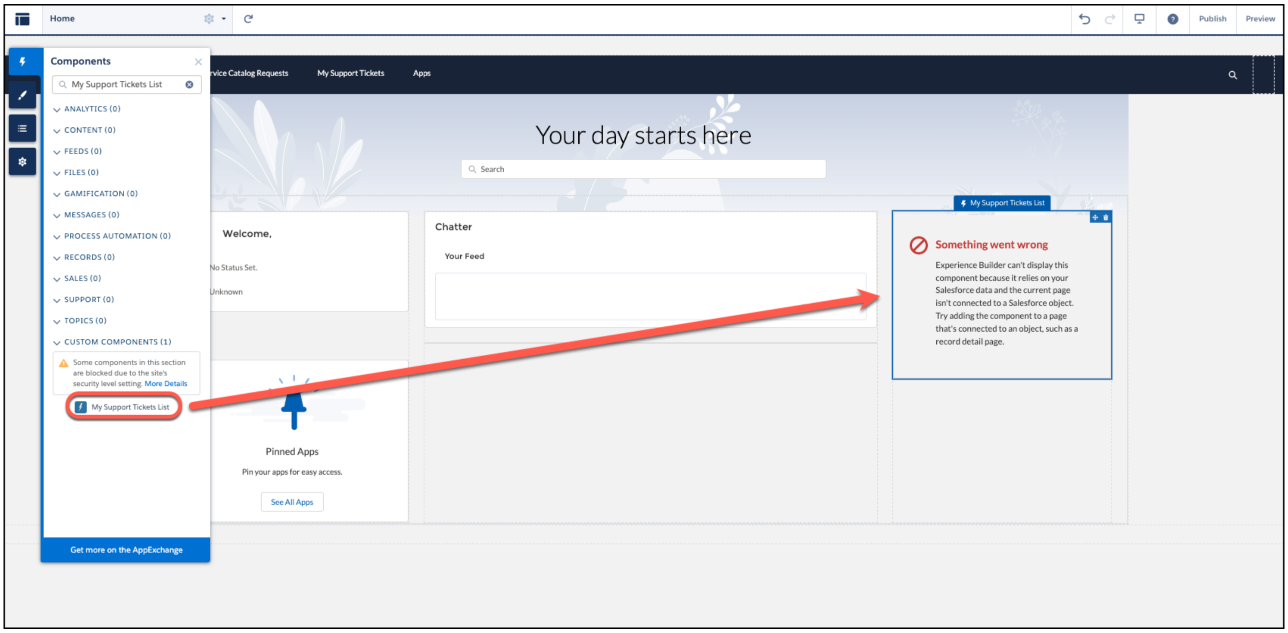
4. In the Featured Catalogs window, enter `Service_Catalog_Item__c` for Catalog Item Page Name and `Service_Catalog_Categories__c` for Catalog Categories Page Name.



5. Click

and enter `My Support Tickets List` in the search box.

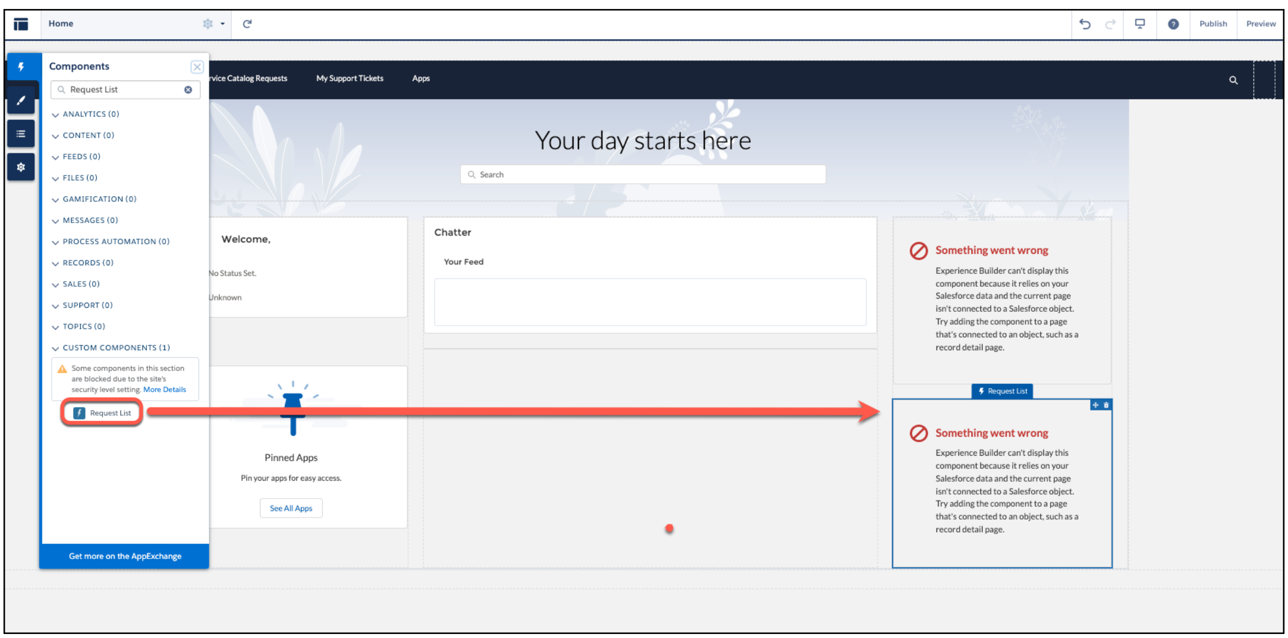
6. Select **My Support Tickets List** to place it on the right side of the builder canvas.



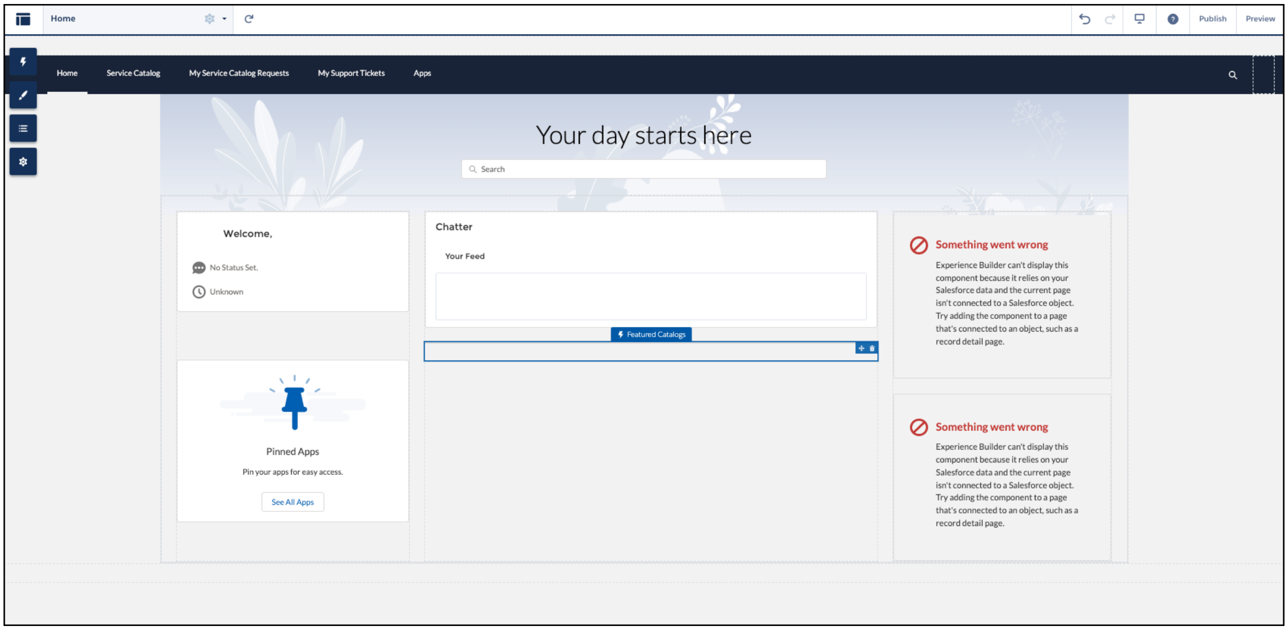
7. Click

on the left side bar, and enter `Request List` in the search box.

8. Select **Request List** to place it on the right side of the builder canvas.



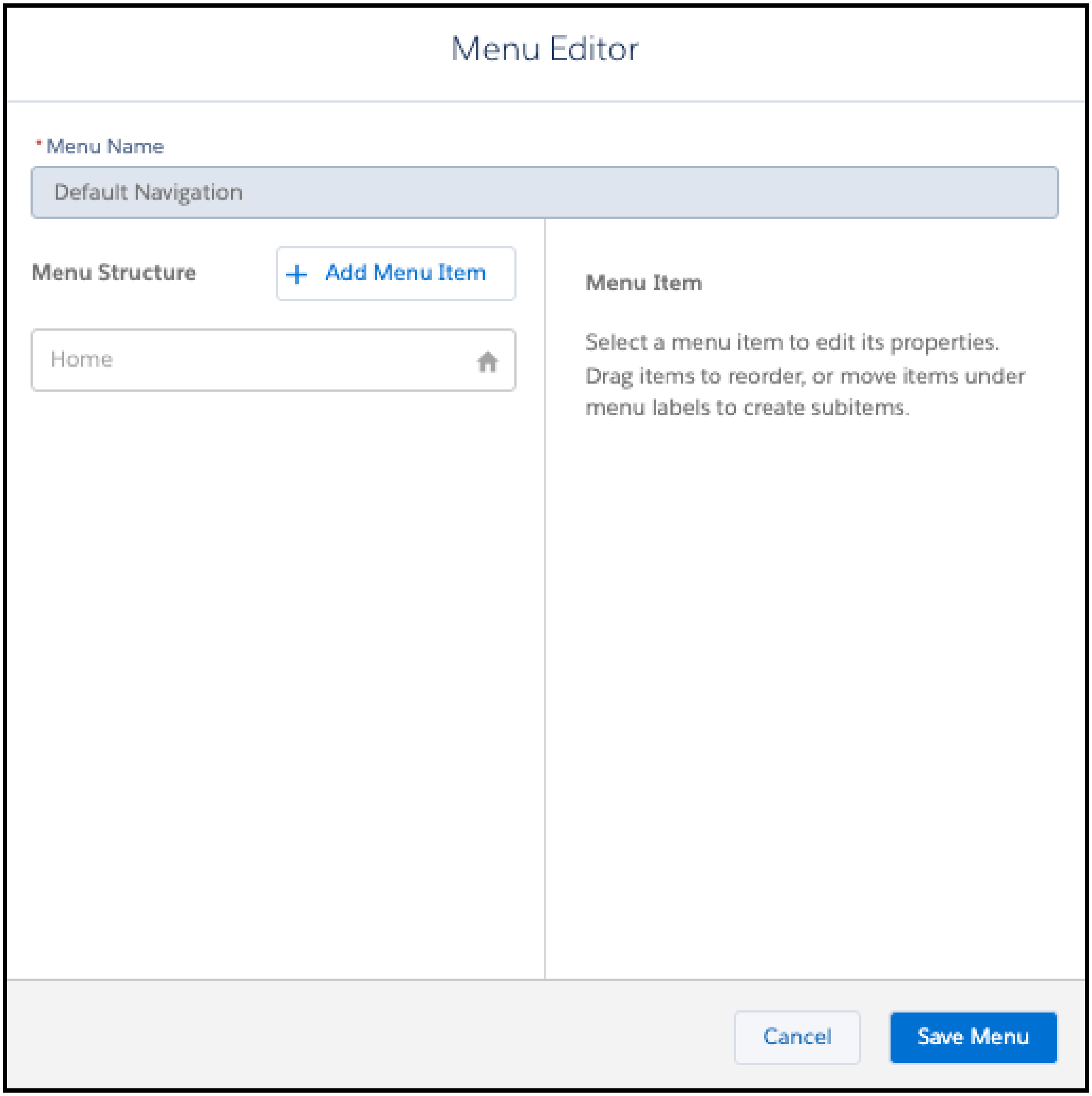
Example: The Employee Workspace home page shows the Employee Concierge and Service Catalog components in the Digital Experiences site builder.



Add the My Support Tickets and Service Catalog Tabs to the Navigation Bar

Add the Service Catalog, My Service Catalog Requests, and My Support Tickets tabs to the navigation bar of your Employee Workspace site to provide your employees access these resources..

1. Click , and select **Navigation**.
2. From the Default Navigation dropdown, click **Edit.**.
   The Menu Editor opens.



3. Add the Service Catalog tab.
   a. Click **+ Add Menu Item**.
   b. For Name, enter `Service Catalog`.
   c. For Type, select **Site Page**.
   d. For Page, select **Service Catalog Categories**.
4. Add the My Service Catalog Request tab.
   a. Click **+ Add Menu Item**.
   b. For Name, enter `My Service Catalog Requests`.

c. For Type, select **Salesforce Object**.

d. For Object Type, select **Service Catalog Request**.

e. For Default List View, select **Default**.

5. Add the My Support Tickets tab.

a. Click **+ Add Menu Item**.

b. For Name, enter `My Support Tickets`.

c. For Type, select **Salesforce Object**.

d. For Object Type, select **Case**.

e. For Default List View, select **Default**.

6. Optional: Add the Apps tab.

a. Click **+ Add Menu Item**.

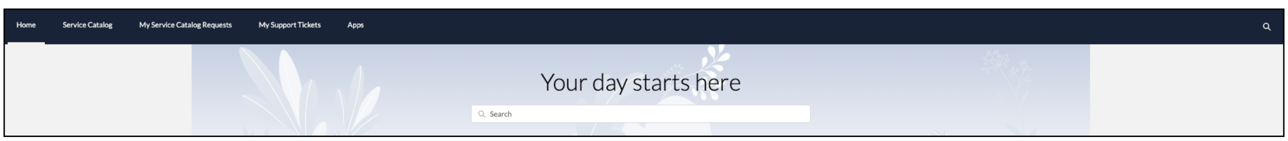
b. For Name, enter **Apps**.

c. For Type, select **Site Page**.

d. For Page, select **Apps**.

7. Click **Save Menu**.
The Home page refreshes.

Example: This navigation bar example shows the Employee Concierge and Service Catalog components and pages.



Optimize Ticket Attachments with the Attachments Component

Add the Attachment component to the My Support Tickets Page and the IT Case Page Layout to attach files to a ticket or edit a list of files attached to a ticket. If you deployed Employee Concierge using package version 7 or earlier, update your package to benefit from ticket attachments. If you deployed Employee Concierge using version 8 or later, no action is needed.

These features are available when using ticket attachments.

- You can add attachments directly to ticket posts or comments, which render in the attachments section of the My Service Tickets page and as a thumbnail icon in your post or comment.
- You can attach knowledge articles to a ticket post, which render in the Employee Workspace home page and the My Service Tickets page.
- The name and file type displays for each attachment uploaded to a ticket post or comment.
- The user who uploaded an attachment to a ticket post or comment can delete it.
- You can attach as many files as you want to a ticket, and you can upload up to 10 files at a time.

1. Add an Attachments Component to the My Support Tickets Page

   View and edit a list of files attached to a ticket in the My Support Tickets page with the Attachments component. If you built the My Support Tickets page using the site template in Employee Concierge version 8.0 or later, the Attachments component is automatically enabled. If you built the My Support Tickets page using the site template in version 7 or earlier, add the Attachments component.

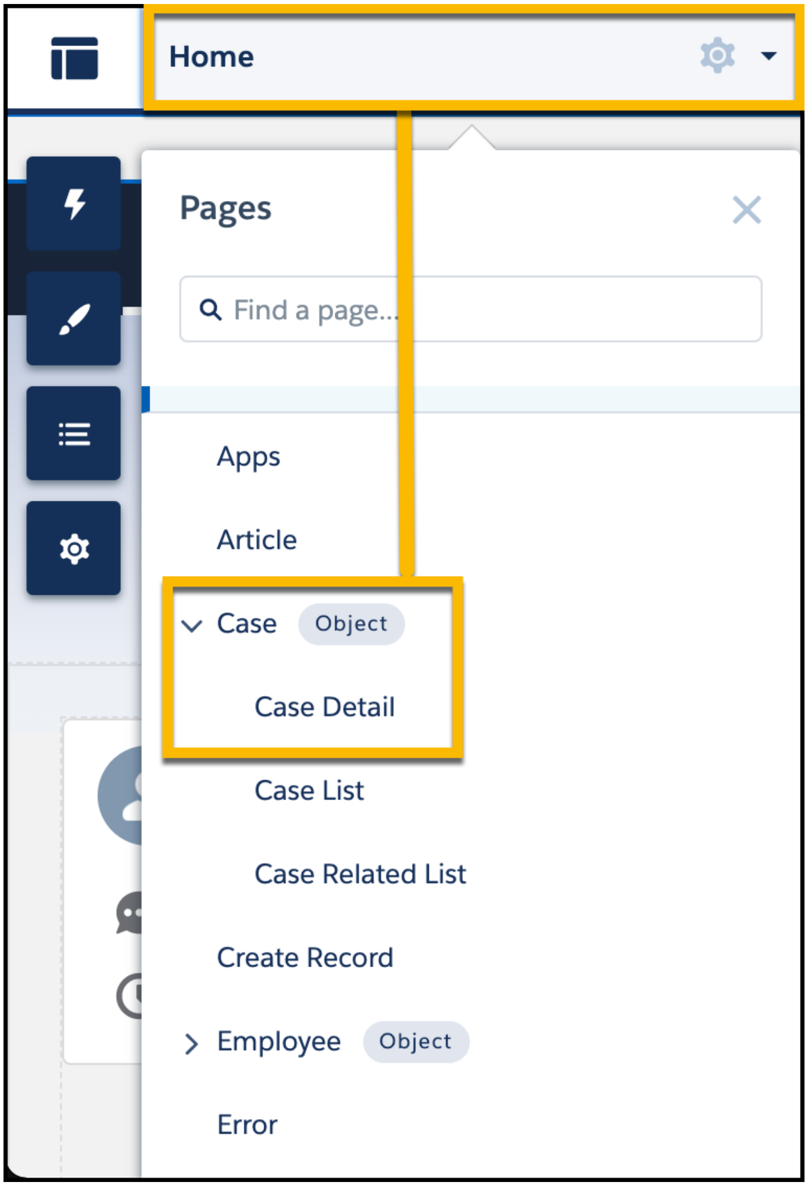
2. Update the IT Case Page Layout to Use Attachments

   Attach files when creating a ticket or edit a list of files attached to an existing ticket. If you deployed Employee Concierge using package version 7 or earlier, edit the IT Case page layout to replace the Files component with the Attachments component and add an Edit button. If you deployed Employee Concierge using version 8 or later, no action is needed.

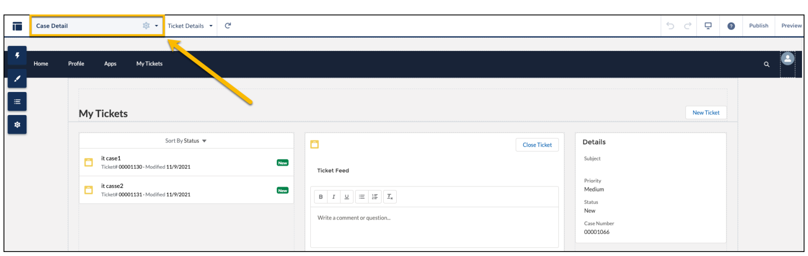
Add an Attachments Component to the My Support Tickets Page

View and edit a list of files attached to a ticket in the My Support Tickets page with the Attachments component. If you built the My Support Tickets page using the site template in Employee Concierge version 8.0 or later, the Attachments component is automatically enabled. If you built the My Support Tickets page using the site template in version 7 or earlier, add the Attachments component.

1. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites**.
2. Next to the name of your Employee Workspace site, click **Builder**.
3. From the Pages menu in the top toolbar, select **Case**, and then select **Case Detail**.



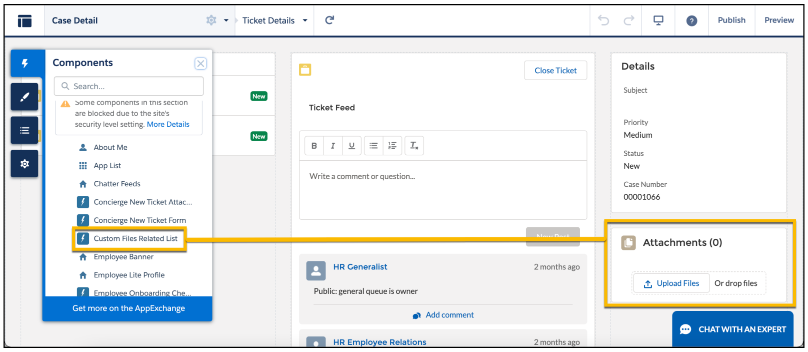
The Case Detail page opens.



4. On the Case Detail page, delete the Activity History and Related Lists Attachments components if they're present in the builder canvas.

5. Click  to open the Components panel.

6. Under Custom Components, select **Custom Files Related List**, and place it under the My Tickets Ticket Details component.



7. To verify how the updated My Support Tickets page looks on different devices, click **Preview**.
8. To make your update generally available, click **Publish**.

Update the IT Case Page Layout to Use Attachments

Attach files when creating a ticket or edit a list of files attached to an existing ticket. If you deployed Employee Concierge using package version 7 or earlier, edit the IT Case page layout to replace the Files component with the Attachments component and add an Edit button. If you deployed Employee Concierge using version 8 or later, no action is needed.

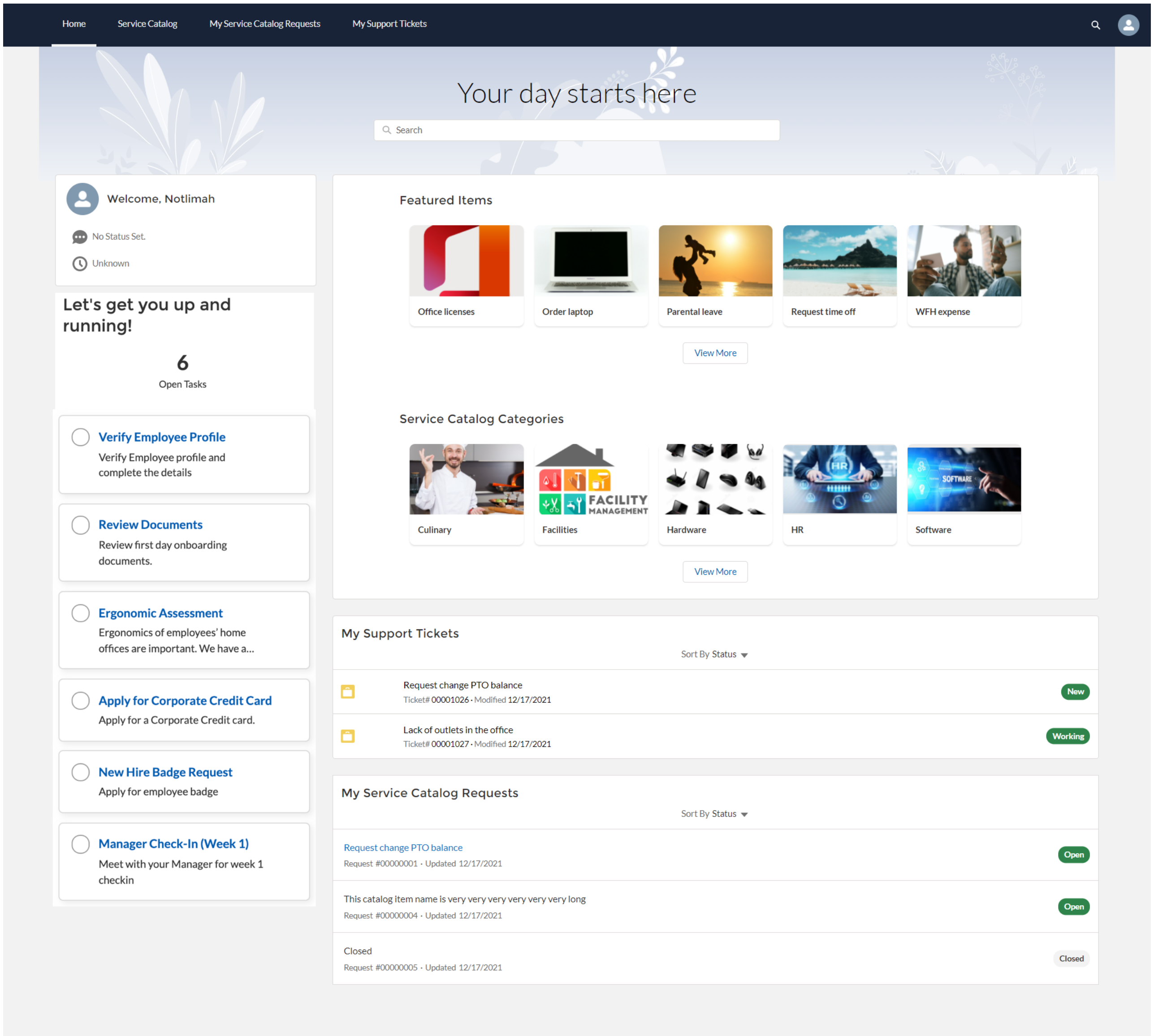
1. From Setup, click the **Object Manager** tab.
2. Select **Case** > **Case Page Layouts** .
3. Select the **IT** page layout.
4. Replace the Files component with the Attachments component.
   a. In the Related Lists section, remove the Files component.
   b. Select the **Related Lists** category in the palette.
   c. Drag the **Attachments** component from the palette to the Related Lists section.
5. Add an Edit button to the IT page layout.
   a. In the palette, select the **Mobile & Lightning Actions** category.
   b. Drag the **Edit** button from the palette to the Salesforce Mobile and Lightning Experience Actions section.
6. Save your changes.

Publish Your Employee Workspace Site

Publish your site to save the pages and components you've set up in your Employee Workspace site.

1. In the Digital Experience site builder, click the gear icon to open Settings.
2. Under General Settings, deselect **Public can access the community**.
3. From the site toolbar, click **Publish**.
   Publishing a site can take some time. You receive an email confirmation when the process is complete and your changes are live.

This is an example Employee Workspace site layout that appears when you publish.



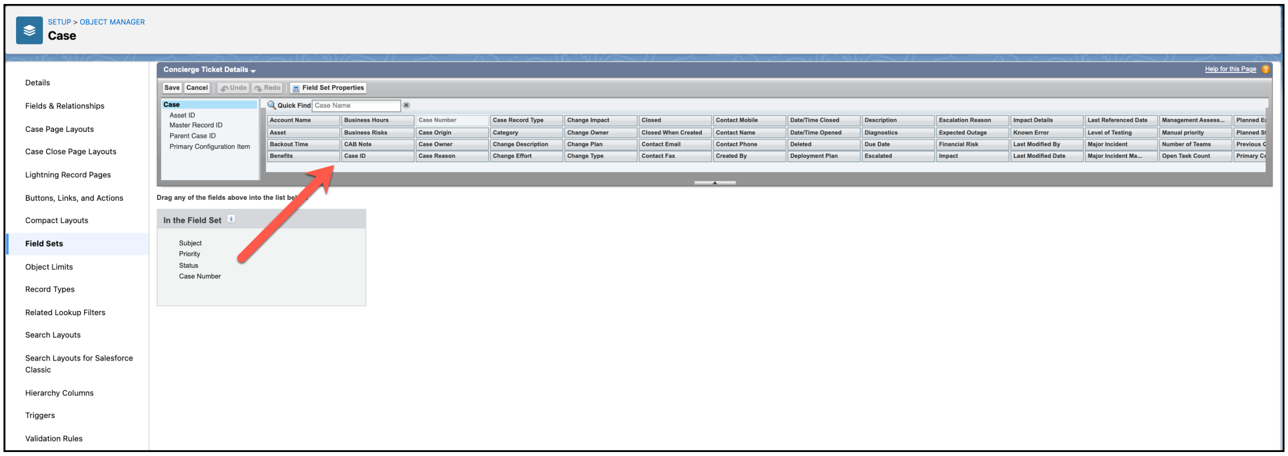
After you publish your Employee Workspace site, proceed to Salesforce CMS to finalize setup of the pages and components.

Add Custom and Standard Fields to the Employee Concierge Ticket Details Field Set

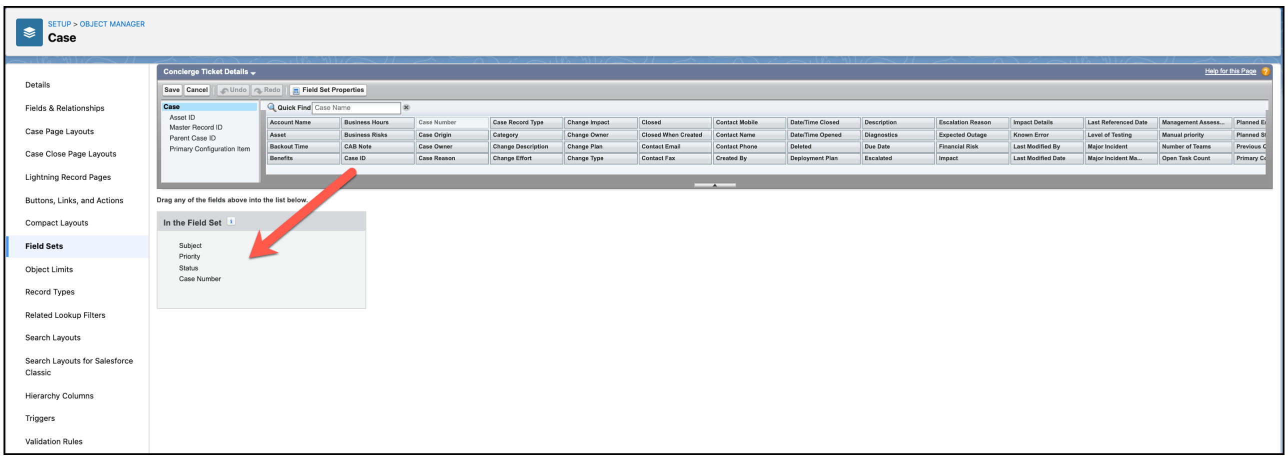
Add custom or standard fields that you want to appear in the ticket details component of the My Support Tickets page.

1. From Setup, in the Quick Find box, enter `Object Manager`, and then select **Object Manager**.
2. Select **Field Sets**, and click **Concierge Ticket Details**.
3. Move the preset fields that you don't want to appear from **In the Field Set** to the Field Set list.

   The preset fields are Subject, Priority, Status, and Case Number.



4. Move the standard or custom fields from the Field Set list to **In the Field Set**.



5. Save your changes.

Your setup of the Employee Concierge and Service Catalog pages is complete.

Configure Employee Concierge Ticket Assignment

To give IT Agents easy access to tickets, add them to a public group and create and associate a queue with that group. Then create and set assignment and sharing rules for tickets.

USER PERMISSIONS

To configure Employee Concierge:

- Permissions and licenses associated with the Employee Workspace Admin persona for Employee Concierge

Assign Users to the IT Service Agents Public Group

The public group IT Service Agents Tier 1 is created in your org when you install Employee Concierge, but you must manually assign users to the group. We recommend you use this group in conjunction with the related queue to assign cases.

Create Queues for Ticket Assignment

Create and associate a queue with the IT Service Agent Tier 1 public group. Members of that public group can access and take ownership of cases in the queue. Create a default queue for cases that aren't assigned to the IT Agent or other group.

Specify Default Ticket Assignments

When no other owner can be assigned, you can assign cases to the Default Queue to make sure all tickets get appropriate attention.

Create Agent Desk Assignment Rules

When a case is created manually or imported without a specified record type, assignment rules determine the record type. Create an assignment rule to set the IT record type as the default for these tickets in Employee Concierge.

Set Assignment Rules as the Default for New Tickets

To ensure that all new tickets are assigned to a queue, including tickets created in the Agent Desk app, update the Case Page Layout. Then set assignment rules as the default.

Create a Sharing Rule for Tickets

To give IT Agents access to tickets they don't own, create a criteria-based sharing rule.

Assign Users to the IT Service Agents Public Group

The public group IT Service Agents Tier 1 is created in your org when you install Employee Concierge, but you must manually assign users to the group. We recommend you use this group in conjunction with the related queue to assign cases.

1. From Setup, use Quick Find to search for and select **Public Groups**.
2. From the table, click **IT Service Agents Tier 1**. Click **Edit**.
3. From the Search dropdown, select **Users**.
4. Add Available Members to the Selected Members.
5. Save your changes.

We recommend using public groups to handle IT Agents roles instead of assigning them directly to queues. A public group can include other groups, users in a role or territory, or users in a role or territory *plus* all users below that role or territory in the hierarchy. Create more public groups with unique names for different cases based on your organization's needs.

SEE ALSO:

What Is a Group?

Create Queues for Ticket Assignment

Create and associate a queue with the IT Service Agent Tier 1 public group. Members of that public group can access and take ownership of cases in the queue. Create a default queue for cases that aren't assigned to the IT Agent or other group.

1. From Setup, in the Quick Find box, enter `Queues`, and select **Queues**.
2. Click **New**.
3. Enter the label `IT Service Agent Tier 1`.
4. We recommend sending emails to a centralized queue email address as well as to individual queue members. To do so, enter an email address and select **Send Email to Members**.
5. Add **Case** from Available Objects to Selected Objects.
6. In Queue Members, select **Public Groups** and search for `IT Service Agents Tier 1`.
7. Select **IT Service Agents Tier 1** in the list of available members and add it to the list of selected members.
8. Save your changes.
9. Repeat steps 1–8 to create a Default Queue.

You can use the default queue for cases that aren't assigned to a specific group or IT Agent.

To associate a queue with a public group, the labels for the queue and public group must match exactly. The public group called IT Service Agent Tier 1 was created when you installed the Employee Concierge package. We recommend using the same label for this queue. Customize these labels and add groups and queues to meet your needs.

Note: If the case trigger (`wkdw__CaseTrigger`) is disabled, an employee loses access to a ticket when an IT Agent takes ownership of the related case.

SEE ALSO:

Create Queues

Employee Concierge for Work.com Developer Guide: Employee Concierge Triggers

Specify Default Ticket Assignments

When no other owner can be assigned, you can assign cases to the Default Queue to make sure all tickets get appropriate attention.

1. From Setup, in the Quick Find box, enter *`Support Settings`*, and select **Support Settings**.
2. Click **Edit**.
3. Select **Queue** as the default case owner type.
4. Specify *`Default Queue`* as the owner of a case when assignment rules fail to locate an owner.
5. In the Automated Case User field, select **System**.

   This selection ensures that the Automated username appears in the case history when a case is reassigned by an automated process, such as an assignment rule.
6. Save your changes.

SEE ALSO:

Customize Support Settings

Create Agent Desk Assignment Rules

When a case is created manually or imported without a specified record type, assignment rules determine the record type. Create an assignment rule to set the IT record type as the default for these tickets in Employee Concierge.

1. From Service Setup, use Quick Find to search for and select **Case Assignment Rules**.
2. Click **New**.
3. For the rule name, enter *`Concierge Assignment Rules`*, and select **Active**.
4. Save your changes.
5. To customize your rule, in the Case Assignment table, click **Concierge Assignment Rules**.
6. In Rule Entries, click **New**.
7. In Step 1, for Sort Order, enter *`1`*.
8. In Step 2, enter these settings.
   a. Run the rule if the **criteria are met**.
   b. For the field case, select **Case Record Type**.

c. For the operator, select **Equals**.

d. For the value, enter `IT`.

9. In Step 3, select **Queue** and enter `IT Service Agent Tier 1`.

10. Save your changes.

If no assignment rules apply, the record type of the case owner is used. When the default case owner is a queue, the queue owner's default record type is used.

SEE ALSO:

Set Up Assignment Rules

Set Assignment Rules as the Default for New Tickets

To ensure that all new tickets are assigned to a queue, including tickets created in the Agent Desk app, update the Case Page Layout. Then set assignment rules as the default.

1. From Service Setup, click **Object Manager**.
2. Click **Case** and **Case Page Layouts**.
3. Click the **IT Page Layout Name**.
4. Click **Layout Properties**.
5. Under Case Assignment Checkbox, select **Default** and deselect **Show on edit page**.
6. To save your changes, click **OK**.

Create a Sharing Rule for Tickets

To give IT Agents access to tickets they don't own, create a criteria-based sharing rule.

1. From Service Setup, use Quick Find to search for and select **Sharing Settings**.
2. Under Case Sharing Rules, click **New**.
3. In Step 1, enter `IT Case Sharing` as the label.
4. In Step 2, select **Based On Criteria**.
5. In Step 3, enter these settings:
   a. Field: **Case Record Type**
   b. Operator: **Equals**
   c. Value: `IT`
6. In Step 4, share with the public group **IT Service Agents Tier 1**.
7. In Step 5, set the case access to Read/Write, allowing agents to edit cases they don't own.

8. Save your changes.

SEE ALSO:

Sharing Rules

Create Criteria-Based Sharing Rules

Service Console Case Feed Accessibility for Employee Users Who Are Service Agents

Set Up the Agent Desk App

To complete the setup for Agent Desk, assign page and record layouts, and share the custom list view.

USER PERMISSIONS

To configure Employee Concierge:

- Permissions and licenses associated with the Employee Workspace Admin persona for Employee Concierge

Edit Agent Desk Utility Items

The utility bar at the bottom of Agent Desk gives IT Agents a shortcut to their cases and recently viewed items. Change the generic utility item name and icon. Add access to Knowledge records as recent items.

Assign the IT Case Page Layout

The IT Case page layout and compact page layout are added to your org when you install Employee Concierge. The compact page layout is also assigned to IT records during installation. Assign the page layout to all IT record types and related profiles to have it appear in your org.

Activate and Assign the IT Case Record Layout

Employee Concierge creates a custom IT Case record page layout in your org. Activate the page layout and assign it to the IT Agent and System Administrator profiles.

Enable the IT Case Path

The Employee Concierge installation process adds an IT Case path. If the path is disabled, enable the path by enabling the Path feature.

Share the Tier 1 Cases List View with Tier 1 Public Groups

The Agent Desk console app includes a custom list view for IT Support Tier 1 cases. Share this list view with the IT Service Agents Tier 1 public group so your IT Agents have access to it.

Edit Agent Desk Utility Items

The utility bar at the bottom of Agent Desk gives IT Agents a shortcut to their cases and recently viewed items. Change the generic utility item name and icon. Add access to Knowledge records as recent items.

1. From Service Setup, use Quick Find to search for and select **App Manager**.
2. From the dropdown in the Agent Desk row, select **Edit**.
3. Click **Utility Items (Desktop Only)**.
4. Select **List View**.
5. Under Utility Item Properties, replace the label List View with `My Cases`.
6. Remove the fallback icon. Add the case icon.
7. Select **Recent Items**.
8. Under Component Properties, add Knowledge to the Objects.

9. Save your changes.

Assign the IT Case Page Layout

The IT Case page layout and compact page layout are added to your org when you install Employee Concierge. The compact page layout is also assigned to IT records during installation. Assign the page layout to all IT record types and related profiles to have it appear in your org.

1. From service Setup, click **Object Manager**.
2. Click **Case**, then **Case Page Layouts**.
3. Click **Page Layout Assignment**.
4. Click **Edit Assignment**.
5. Locate the IT column and select the entire column.
6. For Page Layout to Use, select **IT**.
7. Save your changes.

SEE ALSO:

Page Layouts

Activate and Assign the IT Case Record Layout

Employee Concierge creates a custom IT Case record page layout in your org. Activate the page layout and assign it to the IT Agent and System Administrator profiles.

1. From Service Setup, click **Object Manager**.
2. Click **Case**, then **Lightning Record Pages**.
3. From the Lightning Record Pages table, click **IT Case**. In the Lightning Page Detail section, click **Edit**.
4. Click **Activation**.
5. Select **App, Record Type, and Profiles**, then click **Assign to Apps, Record Types, and Profiles**.
6. Select **Agent Desk**, then click **Next**.
7. Select **Desktop and phone**, then click **Next**.
8. Select the **IT** record type, then click **Next**.
9. Select the **IT Agent** and **System Administrator** profiles, then click **Next**.
10. Save your changes.

SEE ALSO:

Activate Your Lightning App Page

Enable the IT Case Path

The Employee Concierge installation process adds an IT Case path. If the path is disabled, enable the path by enabling the Path feature.

1. From Setup, in the Quick Find box, enter `Path Settings`, and select **Path Settings**.
2. Click **Enable**.

3. Select **Remember user's Path preferences**.

   This option keeps a user's path expanded to show guidance and key fields on all their records until they collapse the path.

Share the Tier 1 Cases List View with Tier 1 Public Groups

The Agent Desk console app includes a custom list view for IT Support Tier 1 cases. Share this list view with the IT Service Agents Tier 1 public group so your IT Agents have access to it.

1. From the App Launcher, search for and select **Agent Desk**.
2. From the console navigation tab, select **Cases**.
3. Select the **IT Support Tier 1** list view.
4. To open the list view controls, click the gear icon and select **Sharing Settings**.
5. Select **Share list view with groups of users**, then search for and select **IT Service Agents Tier 1**.
6. Save your changes.

SEE ALSO:

Work with List Views in Lightning Experience

Manage Person Accounts and Employee Records

Support tickets that are created by or for employees are stored and managed as case records. Employee Concierge uses person accounts to associate employee data with cases.

Create Person Accounts for Employee Records

Create and sync person accounts with employee records so employees can be connected to their tickets.

Employee to Person Account Field Mapping

With Employee Concierge, employee record fields map to person account fields.

USER PERMISSIONS

To configure Employee Concierge:

- Permissions and licenses associated with the Employee Workspace Admin persona for Employee Concierge

Create Person Accounts for Employee Records

Create and sync person accounts with employee records so employees can be connected to their tickets.

If you have existing employee records in your org, you must create or update person accounts to complete your initial Employee Concierge setup. If you're configuring Employee Concierge in an org with no employee records, you can skip this step.

1. Use the App Launcher to search for and select **Concierge Settings**.
2. In the Sync Employee Records with Concierge section, click **Sync**.

If the batch job fails or you receive an error, try again. If the process fails repeatedly, contact Salesforce Customer Support. You can get information to help debug errors under Apex Jobs in Setup.

Employee Concierge includes a trigger (`wkdw__EmployeeTrigger`) that automatically creates or updates a person account when you add or update employee records. This trigger is enabled by default. Although it's possible to disable this trigger, we recommend keeping it enabled. You can enable or disable this trigger using the Employee Person Account Sync Disabled option under the Employee Concierge Settings in Custom Settings. If you disable this trigger, run this sync to add or update person accounts when adding or updating employee records.

Note: Run this sync if you install Contact Tracing after configuring Employee Concierge.

SEE ALSO:

- Person Accounts
- Enable Person Accounts
- Employee Concierge for Work.com Developer Guide: Employee Concierge Triggers

Employee to Person Account Field Mapping

With Employee Concierge, employee record fields map to person account fields.

Employee Concierge uses the Case object for tickets, but data from employee records isn't directly associated with cases. To associate employees' data with their tickets, Employee Concierge uses person accounts.

Data surfaces in the Employee Workspace apps from employee record fields. Data surfaces in the Agent Desk app, however, from person account fields. For example, an employee sees data from the Email employee field on their profile. An IT Agent using Agent Desk sees that same data from `PersonEmail` when viewing a case related to that employee.

The related person field (`RelatedPersonId`) on an employee record links employees and person accounts. You can't delete or edit the related person field value on an employee record. This field is hidden from the default layout.

These fields are synchronized from employee records to person accounts:

Employee Field	Person Account Field	Customizable?
DateOfBirth	PersonBirthdate	Yes
Email	PersonEmail	Yes
EmployeeNumber	AccountNumber	No
EmployeeNumber	SourceSystemId__pc*	No
FirstName	FirstName	Yes
Gender	Gender__pc*	Yes
HomeAddress	PersonMailingAddress	Yes
HomeCity	PersonMailingCity	Yes
HomeCountry	PersonMailingCountry	Yes
HomePhone	PersonHomePhone	Yes
HomePostalCode	PersonMailingPostalCode	Yes
HomeState	PersonMailingState	Yes
HomeStreet	PersonMailingStreet	Yes
LastName	LastName	Yes
LocationId	PrimaryLocation__pc*	Yes
WorkPhone	Phone	Yes

Note: The fields `SourceSystemId__pc`, `Gender__pc`, and `PrimaryLocation__pc` are only available in orgs with Contact Tracing.

The employee record is the source of truth. We don't recommend editing person accounts. Any updates or changes you make to a person account are overwritten by the employee record.

SEE ALSO:

Contact Tracing for Employees

Employee Concierge for Work.com Developer Guide: Custom Metadata Types Used by Employee Concierge

Create Ticket Categories (Optional)

USER PERMISSIONS

To configure Employee Concierge:

- Permissions and licenses associated with the Employee Workspace Admin persona for Employee Concierge

By default, Employee Concierge includes one ticket category. This category is used for all tickets unless you add more categories to your org. Create additional categories to allow employees and IT Agents to create more than one type of ticket. To add ticket categories to your org, complete all configuration steps in this section. Adding ticket categories is optional.

1. Add Ticket Category Picklist Values
   Ticket Category is a custom field added to the Case object when you install Employee Concierge. Add new field values to give employees the option to choose a ticket category from a picklist on the new ticket form.
2. Add a Quick Action to the Contact Object
   A quick action allows you to customize the fields and page layout for each ticket category. Create an action for each ticket category.
3. Add the Custom Metadata Type for the New Ticket Category
   To associate a ticket category with the related action, edit the custom metadata type.
4. Associate Knowledge Article Record Types and Ticket Categories
   Make ticket creation easier by mapping knowledge article record types to ticket categories.

Add Ticket Category Picklist Values

Ticket Category is a custom field added to the Case object when you install Employee Concierge. Add new field values to give employees the option to choose a ticket category from a picklist on the new ticket form.

1. From Setup, click **Object Manager**.
2. Click **Case**, then **Fields & Relationships**.
3. Search for and select **Ticket Category**.
4. In the Values section, click **New**.
5. Enter one or more values
6. Save your changes.

Add a Quick Action to the Contact Object

A quick action allows you to customize the fields and page layout for each ticket category. Create an action for each ticket category.

1. From Setup, click **Object Manager**.
2. Click **Contact** then **Buttons, Links, and Actions**.

3. Click **New Action**.
4. Complete the required settings:
   a. Action Type: **Create a Record**
   b. Target Object: **Case**
   c. Record Type: **IT** (or another record type, if available)
   d. Label: Enter a label that is unique and transparent.
   e. Name: The API name auto populates based on the label.
   f. Description: Clearly describe the ticket category.
5. Click **Save**.
6. Drag the Case Field **Ticket Category** onto the page layout.
7. Click **Save**.
8. In the Predefined Field Values section for this Contact Action, click **New**.
9. Select the Field Name **Contact Name**.
10. Enter the Formula Value *`Contact.Id`*
11. Click **Save**.
12. In the Predefined Field Values section, click **New**.
13. Select the Field Name **Account Name**.
14. Enter the Formula Value *`Contact.AccountId`*
15. Save your changes.

Note: Contact Name can't be added as an editable field to the Quick Action page layout.

Add the Custom Metadata Type for the New Ticket Category

To associate a ticket category with the related action, edit the custom metadata type.

1. From Setup, use Quick Find to search for and select **Custom Metadata Types**.
2. From the table, click **Ticket Category Definitions**.
3. Click **Manage Ticket Category Configurations**, then click **New**.
4. Enter a transparent value for each field. Important: The Ticket Category Name must be an exact match to the API Name of picklist value you entered for this Ticket Category.
5. Enter the Quick Action Name. The Quick Action Name must be the exact API name used in the related Action, and be prefixed with `Contact.` If the name for the Action is `New_Action`, for example, enter `Contact.New_Action`
6. Select **Is Active**.
7. Save your changes.

Associate Knowledge Article Record Types and Ticket Categories

Make ticket creation easier by mapping knowledge article record types to ticket categories.

In Employee Concierge version 8 and later, you can associate knowledge article record types to ticket categories. If you deployed Employee Concierge using package version 7 or earlier, you must manually add the AssociatedKnowledgeMapping field to the Ticket Category Definition page layout. If you deployed Employee Concierge using version 8 or later, no action is needed.

1. From Setup, in the Quick Find box, enter `Custom Metadata Types`, and then select **Custom Metadata Types**.
2. From the table, click **Ticket Category Definition**.
3. Click **Manage Records Ticket Category Configuration**, choose the ticket category definition you want to associate, and then click **Edit**.
4. In AssociatedKnowledgeMapping, enter the exact Record Type Name for the type of knowledge articles you want to associate with the ticket category. Knowledge Article Record Type Names can be found under **Setup** > **Object Manager** > **Knowledge** > **Record Types**.

   Note: Associate one knowledge article record type with only one ticket category.

5. Save your work.

The **New Ticket** component appears on knowledge articles of the entered record type.

Prepare Your Team and Customize Concierge

After installing and configuring Employee Concierge, make sure all users have the information they need to succeed. Users have different access, based on their persona and related permissions and licenses. You can also edit or add to the default Concierge configuration to best meet your organization's needs.

Share Resources with Employee Concierge Users

Employees access Employee Concierge tickets and knowledge articles through the Employee Workspace site. IT Agents and Knowledge Authors also use apps and objects within your Salesforce org. Make sure all users have the information they need to get started with Employee Concierge.

Create a Custom Process for Manage Support Cases

With our recommended configuration process, Employee Concierge includes all the features you need to manage support tickets in Employee Workspace. You can, however, customize the default settings or create your own process for managing support cases. Complete the required configuration before you consider any of these customizations.

Share Resources with Employee Concierge Users

Employees access Employee Concierge tickets and knowledge articles through the Employee Workspace site. IT Agents and Knowledge Authors also use apps and objects within your Salesforce org. Make sure all users have the information they need to get started with Employee Concierge.

Employee Concierge is an app within Employee Workspace. To help employees with general features and settings, share the Work From Anywhere With Employee Workspace on page 107 user guide.

In addition to having access to Employee Workspace, Employee Concierge users who are Knowledge Authors (but not IT Agents) have access to some areas of your Salesforce org. They draft and edit knowledge articles using the Knowledge object in Salesforce.

IT Agents have the highest level of access to your Salesforce instance. In addition to using Knowledge, IT Agents use the Agent Desk app to manage cases.

Make sure all users have the information they need to be successful with Employee Workspace and Employee Concierge. We've included some information for IT Agents and Knowledge Authors in the Employee Workspace user guide. Share this information with your team and, if needed, provide additional resources and training specific to your organization.

SEE ALSO:

Agent Desk Considerations

My Support Tickets Page and Service Console Case Feed Access Considerations

Service Console Case Feed Accessibility for Employee Users Who Are Service Agents

Find Answers and Solve Issues with Employee Concierge

Get Started as an IT Agent with Agent Desk

Create a Custom Process for Manage Support Cases

With our recommended configuration process, Employee Concierge includes all the features you need to manage support tickets in Employee Workspace. You can, however, customize the default settings or create your own process for managing support cases. Complete the required configuration before you consider any of these customizations.

Create Additional Support Processes

The Employee Concierge package includes a support process called the IT Process, but you can create additional support processes based on your organization's needs. Support processes use the status field to identify a case within the support lifecycle. If you add a support process to Employee Concierge, review, edit, or add values to the Status picklist field on the Case object. **See also:** Trailhead: Create Support Processes

Add Values to the Types Field on the Case Object

Employee Concierge includes values on the Case object picklist field called Type. You can add or edit values to this picklist field to allow users to indicate different kinds of issues, such as electrical, mechanical, or access. **See also:** Case Fields

Add Case Record Types

Record types determine the business processes, page layouts, and picklist values for tickets. By default, Employee Concierge includes the IT record type on the Case object. This record type corresponds to a unique support process and is enabled for all profiles. If you create an additional record type on the Case object, link it to a support process and enable it for all profiles that file tickets for that kind of case. Users also must have access to a record type. If you use permission sets to grant access to record types, add the new record type to the Case Object Settings on the appropriate permission sets. **See also:** Create Record Types

Add Public Groups and Queues for Multi-Tier Support

Employee Concierge includes a public group and corresponding queue called IT Service Agents Tier 1. Users assigned to that group can see cases routed to that related queue. To create multi-tier support, create additional groups and queues. We recommend creating one public group and one associated queue per tier type, such as IT Service Agents Tier 2 and It Service Agents Tier 3. After creating a new public group and queue, remember to create assignment rules and escalation processes as needed. **See also:** Configure Employee Concierge Ticket Assignment on page 170

Create Escalation Rules

Escalation rules can automatically reassign cases and notify users based on criteria you set. For example, you can create an escalation rule that notifies a specific user if a case remains open after a certain amount of time. **See also:** Set Up Escalation Rules

Employee Concierge Bot

Give your employees concise answers to quick questions. With Employee Concierge Bot, your employees can find case statuses and get frequently asked questions answered rapidly.

Employee Concierge Bot is an integrated chatbot. Employee Concierge Bot isn't available on mobile.

Employee Workspace and Employee Concierge must be installed before you can use Employee Concierge Bot.

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

Get Started with Employee Concierge Bot
Before you can install Employee Concierge Bot, you enable chat and Einstein Bots.

Install the Employee Concierge Bot Unmanaged Package
Use the Work.com installer to add the Employee Concierge Bot unmanaged package.

Deploy Chat Functions
Employee Concierge Bot requires deploying the chat functions.

Set Up Omni-Channel Routing
Omni-Channel Routing connects agents and assignments to Employee Concierge Bot.

Add the Concierge Bot Chat Skill
Skills identify your agents' areas of expertise. When you assign an agent to a skill, that agent receives chat requests that are related to the agent's skill areas.

Add a Concierge Bot Chat Button
Adding a chat button helps users access Concierge Bot.

Create an Embedded Service Deployment
Create an Embedded Service deployment for each embedded chat window that you're using. The setup node for Embedded Chat is available only in Lightning Experience.

Customize the Pre-Chat Form
You can decide what appears on the pre-chat form for Employee Concierge Bot.

Create a Concierge Bot Integration User
An Integration User is a more secure, auditable way to execute flows, and apex into and out of your instance without relying on an existing user's license.

Add Branding to Employee Concierge Bot
You can personalize the way Employee Concierge Bot responds.

Deploy Employee Concierge Bot to the Chat Channel
You must deploy Employee Concierge Bot to access it.

Select a Security Level for Your Community
The correct security level is vital for controlling data access.

Add Concierge Bot to Your Community Template
Making Concierge Bot available on a Community template helps users access it easily.

Get Started with Employee Concierge Bot

Before you can install Employee Concierge Bot, you enable chat and Einstein Bots.

1. Enable chat.
   a. From Service Setup, in the Quick Find box, enter `Chat` in the Quick Find box, and then select **Chat Settings**.
   b. Click **Enable Chat**.
   c. Click **Save**.
   d. Copy the Chat API Endpoint URL through the domain name (for example, https://salesforce.com).
2. Enable Einstein Bots.
   a. From Service Setup, in the Quick Find box, enter `Einstein Bots`, and then select **Einstein Bots**.
   b. Turn on Einstein Bots.
   c. If prompted, accept the terms, and click **Try Einstein**.

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

USER PERMISSIONS

To enable chat and Einstein Bots:
- Employee Productivity Plus

Install the Employee Concierge Bot Unmanaged Package

Use the Work.com installer to add the Employee Concierge Bot unmanaged package.

To install Employee Concierge Bot, you must have Employee Workspace and Employee Concierge installed.

1. From your browser, navigate to `https://install.work.com`.
2. On the Employee Productivity tab, click **Employee Concierge Bot**.
3. Click **Install and Configure Employee Concierge Bot**.
4. Click **Log In to Start Pre-Install Validation**.
5. Select your org type, and enter your Salesforce username and password.
6. To run the pre-installation validation, click **Start Pre-Install Validation**.
7. For Connected to Salesforce, confirm that you're logged in to the correct org.

   If the validation fails, use the error messages in the installer to troubleshoot and complete the requirements. When you're ready, return to `https://install.work.com` and try again.
8. Review the customizations that the installer makes in your org.
9. Click **Install**.

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

Deploy Chat Functions

Employee Concierge Bot requires deploying the chat functions.

1. From Service Setup, in the Quick Find box, enter `Deployments`, and then select **Deployments**.
2. Click **New**.
3. Enter the following information.

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

- Chat Deployment Name: `Concierge Bot Deployment`
- Developer Name: `Concierge_Bot_Deployment`
- Chat Window Title: `Concierge Bot`

4. Select **Allow Access to Prechat API**, and save your work.

Set Up Omni-Channel Routing

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

Omni-Channel Routing connects agents and assignments to Employee Concierge Bot.

1. From Service Setup, in the Quick Find box, enter `Omni-Channel Settings`, and then select **Omni-Channel Settings**.
2. Select **Enable Omni-Channel** and **Enable Skills-Based Routing**, and then save your work.
3. Click the **Setup** icon, and then select **Service Setup**.
4. In Recommended Setup, select **View All**.
5. Scroll to select **Omni-Channel Setup**, or you can enter `Omni-Channel` in the Quick Find box.
6. Click **Start**.
7. Create an agent queue.
    - Queue Name: `Concierge Bot Channel`
    - Name These Agents: `Concierge Bot Channel`
8. Add agents to the queue by clicking the **+** sign next to an agent's name or searching for the agent.

    Note: Be sure to add your name to the list of agents.

9. Click **Next**.
10. For Priority for the Routing Configuration for the Concierge Bot Channel, enter `1`.
11. Accept the defaults for the remainder of the flow, and then click **Finish**.

Add the Concierge Bot Chat Skill

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

Skills identify your agents' areas of expertise. When you assign an agent to a skill, that agent receives chat requests that are related to the agent's skill areas.

1. From Setup, in the Quick Find box, enter `Skills`, and then select **Service** > **Chat** > **Skills**.
2. Click **New**.
3. For the name of the skill, enter `Concierge Bot Skill`, and save your work.

Add a Concierge Bot Chat Button

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

Adding a chat button helps users access Concierge Bot.

1. From Service Setup, in the Quick Find box, enter `Chat Buttons`, and then select **Chat Buttons & Invitations**.
2. Click **New**.
3. Under Basic Information, for Type, select **Chat Button**, and name the button.

- Name: *Concierge Bot Chat Button*
- Developer Name: *Concierge_Bot_Chat_Button*

4. Under Routing Information, do the following.
   a. For Routing Type, select **Button Skills**.
   b. For Routing Configuration, select **Concierge Bot Channel**.
   c. Add **Concierge Bot Skill** to the selected skills, and save your work.

Create an Embedded Service Deployment

Create an Embedded Service deployment for each embedded chat window that you're using. The setup node for Embedded Chat is available only in Lightning Experience.

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

1. From Service Setup, in the Quick Find box, enter *Embedded Service*, and then select **Embedded Service Deployments**.
2. On the Embedded Service configuration page, click **New Deployment**.
3. Select **Embedded Chat**, and click **Next**.
4. For Embedded Service Deployment Name, enter *Concierge Bot*. The API Name field automatically populates.
5. In the Site Endpoint menu, select your Employee Workspace community, and save your work.

Customize the Pre-Chat Form

You can decide what appears on the pre-chat form for Employee Concierge Bot.

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

1. From Service Setup, in the Quick Find box, enter *Embedded Service*, and then select **Embedded Service Deployments**.
2. From the Concierge Bot Deployment dropdown, select **View**.
3. Next to Chat Settings, click **Edit**.

   Note: In new orgs, click **Start**, and save your work. You're then redirected to Chat Settings.

4. Move the radio button to **Active** in the Pre-Chat section.
5. Next to Customize with Lightning Components, click **Edit**.
6. For Chat Messages (Text), select **messageRenderer**.
7. For Pre-Chat, select **customPrechat**, and save your work.

Create a Concierge Bot Integration User

An Integration User is a more secure, auditable way to execute flows, and apex into and out of your instance without relying on an existing user's license.

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

1. From Setup, in the Quick Find box, enter *Users*, and then select *Users*.
2. Click **New User**.
3. Enter the following information.
   - First Name: *Concierge*

- Last Name: *Bot*
- Email: *ConciergeBot@salesforce.com*
- User License: *Salesforce*
- Profile: *Standard User*
- General Information: *Knowledge User, Flow User, Service Cloud User, Chat User*

4. Save your work.

1. Assign and Verify Employee Concierge Bot Permission Sets
   Grant your Integration User the permissions needed to execute flows.
2. Add a Custom Employee Concierge Bot User Profile
   Give your integration user the correct set of permissions with a custom user profile.

Assign and Verify Employee Concierge Bot Permission Sets

Grant your Integration User the permissions needed to execute flows.

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. Select the **Salesforce Employee Concierge Bot** permission set.
3. Under Object Settings, select **Accounts**, and then click **Edit**.
4. Under Accounts, assign the **Person Account** record type and the **Read** and **View All** object permissions, and save your work.
5. Under Object Settings, select **Cases**, and then click **Edit**.
6. Under Cases, assign the **Read** and **View All** object permissions, and save your work.
7. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
8. Select the Concierge Bot integration user that you created.
9. Under Permission Set Assignments, click **Edit Assignments**.
10. Assign the **Employee Workspace User** and **Salesforce Employee Concierge Bot** permission sets, and save your work.
11. Under Permission Set Group Assignments, click **Edit Assignments**.
12. Assign the **Employee Concierge Access Group** permission set group.
13. Save your work, and click **Continue** to automatically add the associated permission set license to the integration user.

SEE ALSO:

Create a Concierge Bot Integration User

Add a Custom Employee Concierge Bot User Profile

Give your integration user the correct set of permissions with a custom user profile.

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

1. From Setup, in the Quick Find box, enter *Einstein Bots*, and then select **Einstein Bots**.
2. Under My Bots, for Employee Concierge Bot, click **Edit**.
3. In the Einstein Bot Builder menu, select **Overview**.

4. In the Bot User area under Setting, click **Edit**, and select **Custom Chatbot User**.
5. Search and select the Concierge Bot integration user you created, and save your work.

SEE ALSO:

Create a Concierge Bot Integration User

Add Branding to Employee Concierge Bot

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

You can personalize the way Employee Concierge Bot responds.

1. From Setup, in the Quick Find box, enter `Embedded Service`, and then click **Embedded Service Deployments**.
2. From Employee Concierge Bot deployment, select **View**.
3. Next to Chat Settings, click **Edit**.
4. Under Additional Branding, click **Edit**.
5. Under Labels, for the Chat State, select **Waiting**.
6. For Label Group, select **Queue Position Not Displayed**.
7. Enter "Hello!" as a customized label for the default label "Hello, (0)!" and save your work.

Deploy Employee Concierge Bot to the Chat Channel

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

You must deploy Employee Concierge Bot to access it.

1. From Employee Concierge Bot Builder, select **Overview**.
2. Under Channels, click **Add**.
3. For Channel, select **Chat**.
4. For Deployment, select **Concierge Bot Chat Button**, and save your work.
5. Click **Activate**.

Select a Security Level for Your Community

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

The correct security level is vital for controlling data access.

1. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites**.
2. Next to the Employee Workspace Community, click **Builder** to launch the Experience Builder.
3. In Experience Builder, open **Settings**.
4. In Settings, under Security & Privacy, select **Relaxed CSP: Permit Access to Inline Scripts and Allowed Hosts** for the Security Level.
5. Under Trusted Sites for Scripts, click **Add Trusted Site**.
6. Add your Chat API Endpoint URL.
   a. To locate your Chat API Endpoint URL, from Service Setup, in the Quick Find box, enter `Chat`, and select **Chat Settings**.
   b. Copy the URL through the domain name, for example, https://salesforce.com.
7. Leave the URL active, and name it `Concierge Chat Bot`.

8. Click **Add Site**.
9. For changes to the security level to take effect, in Experience Builder, click **Publish**.

SEE ALSO:

Get Started with Employee Concierge Bot

Add Concierge Bot to Your Community Template

EDITIONS

Available in: Lightning Experience, Enterprise, and Unlimited Editions

Making Concierge Bot available on a Community template helps users access it easily.

1. In Experience Builder, from the Pages menu in the top toolbar, select **Home**.
2. To open the Components panel, click the Lightning icon.
3. Drag the **Embedded Service Chat** component to the footer of the page.

   You can expect to see the Concierge New Ticket Form component in the footer already.
4. In the Embedded Service Chat highlights panel, for Snippet Settings File, enter `ConciergeBot_SnippetSettingsFile`.
5. Publish the file.

IT Service Center

With IT Service Center, IT agents can autonomously troubleshoot and resolve issues faster with real-time visibility into any employee endpoint using automated IT service management functionality. Agents can also view live asset data and take action on incidents before they impact business operations.

Important: The documentation available at these links is written and provided by Tanium, Inc. and isn't Salesforce Documentation, as that term is defined in your Master Subscription Agreement. Your use of this Tanium documentation, as well as the Tanium Non-SFDC Applications to which this documentation pertains, is subject to Tanium's Subscription Agreement available at tanium.com/taas-subscription-agreement. Salesforce doesn't warrant the accuracy of and isn't responsible for this Tanium documentation.

To install and configure the IT Service Center managed package, use the IT Service Center Administration Guide. When you're done, review and share the IT Service Center User Guide with your agents.

SEE ALSO:

External Site: IT Service Center Administration Guide

External Site: Translations for IT Service Center Administration and User Guides

External Site: IT Service Center User Guide

HR Service Center

HR Service Center helps companies quickly pivot to a hybrid work environment with out-of-the-box HR processes, enabling increased productivity and employee engagement while reducing operational costs.

HR Service Center includes two main areas of functionality:

- It extends Concierge's IT ticketing functionality to include HR ticketing for creating cases.
- A framework that allows an HR specialist to create onboarding tasks and assign them to new employees.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

HR Service Center can streamline employee HR service requests by allowing HR agents to manage tickets with tailored workflows. Employees can search for answers about HR policies and benefits using a built-for HR console that's securely integrated with Employee Concierge's IT solution.

HR Service Center also provides an integrated onboarding experience. HR agents can assign and track onboarding activities for new hires such as reviewing documents, watching an onboarding video, or requesting a corporate credit card. All onboarding tasks are associated with flows that can be created and customized to your business needs.

HR Service Center is part of the Work.com suite of solutions and is the complete employee experience platform for the work-from-anywhere world. Work.com is built on top of the Salesforce Platform and enables employees to be successful from anywhere they work.

Prepare for and Install HR Service Center

HR Service Center can only be installed in an org that has already installed and configured both Employee Workspace and Employee Concierge, and that has enabled person accounts.

Review and Assign Employee Permissions

We recommend using the HR Service Center personas to help you decide how to assign permissions when creating new or configuring existing users in your org.

Overview of Features to Protect Access to Sensitive HR Data

To restrict access to sensitive HR information to specified groups of users, add HR agents to the installed public groups.

Assign Record Types for HR Service Center

Assign case record types to the System Admin, then enable access and set field-level security for knowledge articles.

Configure HR Service Center Ticket Assignments

During the installation process, public groups and queues are added to your org.

Configure Your Org to Use the Health Verification Flow

As an HR Service Center administrator, you must configure your org for the Health Verification flow to work. Configuring your org involves creating the authorization form text record and updating the Health Verification flow with the authorization form text ID.

Set Up the HR Service Center App

To complete the setup for HR Service Center, assign and share the custom list view.

Employee Onboarding

You can use HR Service Center to assign and track onboarding activities for new hires. To streamline the process, you can create templates that are based on an employee's role or required tasks. After onboarding tasks are assigned, you can run reports in Salesforce to confirm that onboarding tasks are completed. Using automated flows and templates, you can also customize onboarding tasks based on role, such as for corporate-level employees or specific international requirements.

Prepare for and Install HR Service Center

HR Service Center can only be installed in an org that has already installed and configured both Employee Workspace and Employee Concierge, and that has enabled person accounts.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Install the HR Service Center Packages

Use the Work.com installer to get the HR Service Center managed package and related packages. After installation, HR Service Center requires setup and configuration.

Verify the HR Service Center in the Package

When installing HR Service Center, objects and metadata are included in managed and unmanaged packages. Objects and metadata that are included in managed packages can't be modified or edited.

SEE ALSO:

Employee Concierge

Configure Employee Workspace and Enable Person Accounts

Install the HR Service Center Packages

Use the Work.com installer to get the HR Service Center managed package and related packages. After installation, HR Service Center requires setup and configuration.

Note: Before installing this package, confirm that these Salesforce installer IP addresses aren't within any restricted ranges, or add them to an allowlist:

- 18.214.2.206
- 3.89.46.237
- 52.201.65.75
- 52.2.53.142

You can remove these IP addresses from your allowlist after installation.

Install the HR Service Center Package

1. Navigate to: https://install.work.com/
2. On the Employee Productivity and Service tab, click **HR Service Center**.
3. Click **Install and Configure HR Service Center**.
4. Click **Log In to Start Pre-Install Validation**.
5. Select your org type. Enter your Salesforce username and password.
6. To run the pre-installation validation, click **Allow**.
7. In the Connected to Salesforce box, confirm that you're logged in to the correct org. If the pre-install validation fails, use the error messages in the installer to troubleshoot and complete the pre-installation requirements. Then return to the installer URL and try again.
8. Review the list of customizations.
9. Click **Install** and accept the terms of use.

Install the Employee Health Verification Package (Optional)

1. Navigate to: https://install.work.com/
2. On the Employee Productivity and Service tab, click **Employee Health Verification**.
3. Click **Install and Configure Employee Health Verification**.
4. Click **Log In to Start Pre-Install Validation**.
5. Select your org type. Enter your Salesforce username and password.
6. To run the pre-installation validation, click **Allow**.
7. In the Connected to Salesforce box, confirm that you're logged in to the correct org. If the pre-install validation fails, use the error messages in the installer to troubleshoot and complete the pre-installation requirements. Then return to the installer URL and try again.
8. Review the list of customizations.
9. Click **Install** and accept the terms of use.

Install the HR Service Center Service Catalog Samples Package

Before installing the package, verify that Consent Management is enabled.

1. From Setup, in the Quick Find box, enter `Data Protection and Privacy`, and then select **Data Protection and Privacy**.
2. Click **Edit**.
3. Select **Make data protection details available in records**.
4. Save your changes.

To install the HR Service Center Service Catalog Samples package, navigate to:
https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4R000001VUiZQAW

Upgrade to New Versions of HR Service Center

When a new version of HR Service Center is available, all HR Service Center managed packages are automatically upgraded for customers. If you need to complete additional upgrade tasks—for example, installing a new package or upgrading an unlocked package—we'll let you know in the release notes.

Verify the HR Service Center in the Package

When installing HR Service Center, objects and metadata are included in managed and unmanaged packages. Objects and metadata that are included in managed packages can't be modified or edited.

1. To see what's in the packages, from Setup, use Quick Find to search for and select **Installed Packages**.

   You see the packages: *HR Service Center* and *HR Service Center Metadata*.

2. Click the package name, then click **View Components**.

Review and Assign Employee Permissions

We recommend using the HR Service Center personas to help you decide how to assign permissions when creating new or configuring existing users in your org.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Meet the HR Service Center Personas

Salesforce uses these personas to organize and recommend permission assignments. When you install the HR Service Center, permissions for each of these personas are added. Review the HR Service Center permissions for more information about the granting permissions for each persona. Decide which persona is right for each user and assign permissions based on their needs.

Assign HR Service Center Permissions

Assign permission set licenses and permission sets to HR Service Center persona. Use permissions, groups, and queues included in the installation package to organize and protect sensitive HR information.

Add HR Service Center Admins

The admin who installed the HR Service Center is automatically the administrator for both your Salesforce org and HR Service Center.

Meet the HR Service Center Personas

Salesforce uses these personas to organize and recommend permission assignments. When you install the HR Service Center, permissions for each of these personas are added. Review the HR Service Center permissions for more information about the granting permissions for each persona. Decide which persona is right for each user and assign permissions based on their needs.

Employee

An employee who has access to the Employee Workspace site. These users can access their profile page and tickets, connected apps, and published knowledge articles, and onboarding tasks assigned to them. If employees have access to the Salesforce org, these users can also view and edit the records they own or records that are shared with them.

HR Service Agent

An employee who can access HR Service Center tickets, onboarding tasks, onboarding templates, initiate onboarding, and assign tasks to employees. They have access to the Employee Workspace site and your Salesforce org.

SEE ALSO:

My Support Tickets Page and Service Console Case Feed Access Considerations

Service Console Case Feed Accessibility for Employee Users Who Are Service Agents

Meet the Employee Concierge Personas

Assign HR Service Center Permissions

Assign permission set licenses and permission sets to HR Service Center persona. Use permissions, groups, and queues included in the installation package to organize and protect sensitive HR information.

These assignments assume that the HR Service Agent, HR Service Center Admin, and Knowledge Author personas use the Employee Workspace as an employee.

Table 4: HR Service Center Employee User Permission Set Assignments Table

Persona	User License	Profile	Feature Licenses	Permission Set License Assignments	Permission Set Assignments	Permission Set Group
Employee with the Productivity Plus License	Salesforce Platform	• Standard Platform User • Clone of Standard Platform User	N/A	• Employee Experience • Employee Productivity Plus • Employee Workspace and Concierge • Company Community for Force.com	• Employee Productivity Plus Access • Employee Productivity Plus User Data Access • Employee Workspace User • Employee Workspace User Data Access • Employee Concierge User Data Access • Employee Knowledge User • Onboarding Health Verification Employee Access	Employee Concierge Access Group

Table 5: HR Service Center Service Agent and Knowledge Author Permission Set Assignments Table

Persona	User License	Profile	Feature Licenses	Permission Set License Assignments	Permission Set Assignments	Permission Set Group
HR Service Center Agent	Salesforce	• Standard User • Clone of Standard User or HR Ageent	Service Cloud User	• Employee Experience • Employee Service Agent	• Employee Service Agent Access • Employee Service Agent User Data Access • Employee Workspace	N/A

Persona	User License	Profile	Feature Licenses	Permission Set License Assignments	Permission Set Assignments	Permission Set Group
					User Data Access • Onboarding Health Verification Access	
HR Service Center Admin	Salesforce	System Admin	Service Cloud User	• Employee Experience • Employee Service Agent • Employee Workspace and Concierge • Employee Productivity Plus	• Employee Service Agent Access • Employee Service Agent User Data Access • Employee Productivity Plus Access • Employee Productivity Plus User Data Access • Employee Workspace User • Employee Workspace User Data Access • Employee Concierge User Data Access • Knowledge Manager • Onboarding Health Verification Access	Employee Concierge Access Group
Knowledge Author	Salesforce	• Standard User	• Service Cloud User	N/A	Knowledge Manager	N/A

Persona	User License	Profile	Feature Licenses	Permission Set License Assignments	Permission Set Assignments	Permission Set Group
		• Clone of Standard User	• Knowledge User			

This table defines the access provided to each permission set.

Table 6: Permission Set Access

Permission Set Name	Access Description
Employee Experience	Provides user access to employee experience data model and permission.
Employee Service Agent Access	Provides access to onboarding tasks, templates, and template tasks.
Employee Service Agent User Data Access	Provides access to the HR Service Center App and related Apex classes.
Employee Productivity Plus Access	Provides read access to onboarding tasks and UI components. Employee Productivity Plus Access requires the Employee Productivity Plus permission set license.
Employee Productivity Plus User Data Access	Provides access to the HR Service Center App, read access to onboarding tasks and templates, object permissions, knowledge article record types, onboarding record types, and access to run flows.
Employee Workspace User Data Access	Access to standard and custom objects related to Employee Workspace data.
Knowledge Manager	Provides access to author knowledge articles in the Service Center.
Onboarding Health Verification Access	Provides Service Agents access to the HealthVerification package, including the required Health Verification data model and UI components, and edit access to the Health Verification object.
Onboarding Health Verification Employee Access	Provides employees access to the Health Verification data model and UI components, and view access to the Health Verification object.

For step-by-step guidance on how to assign users each license or permission type, refer to the relevant Salesforce Help topic.

SEE ALSO:

My Support Tickets Page and Service Console Case Feed Access Considerations
Service Console Case Feed Accessibility for Employee Users Who Are Service Agents
Add a Single User
Assign a Permission Set License to a User
Assign Permission Sets to a Single User
User Licenses
Profiles
Permission Set Licenses
Permission Sets
Feature Licenses Overview
Add Multiple Users
Assign Employee Concierge Permissions

Add HR Service Center Admins

The admin who installed the HR Service Center is automatically the administrator for both your Salesforce org and HR Service Center.

Create and grant permissions manually to additional admins only if they're required for your organization.

1. From Setup, enter Users in the Quick Find box, then select **Users**.
2. Click **New User**.
3. In the User License field, select **Salesforce**.
4. In the Profile field, select the System Administrator profile or similar depending on your org's profile settings.
5. Click **Save**.
6. At the top of the page, click **Permission Set Group Assignments**.
7. Click **Edit Assignments**, then select your permission sets.
8. Save your changes.

Overview of Features to Protect Access to Sensitive HR Data

To restrict access to sensitive HR information to specified groups of users, add HR agents to the installed public groups.

- To organize and protect sensitive HR information, use the installed metadata, objects, and permissions included in the installation packages. Many of the objects and metadata are included in managed packages and can't be modified or edited. These objects and metadata are intended to provide a pre-configured HR management process, but also to protect sensitive HR data from being exposed to unauthorized users.
- Also included in the install package are HR categories for ticket cases. The HR case types include General, Payroll, Benefits, Leave, Onboarding, and Employee Relations. Use the Employee Relations case type for sensitive HR cases, such as improper conduct reports or disciplinary actions.
- Share HR case information only with HR agents whose input is necessary to resolve or approve the case. For example, when an employee files an HR case, the employee's manager doesn't have access to the case information. However, where a manager's approval is required and appropriate, the case can subsequently be made visible to the manager.

- When an HR case is created, the information is accessible only to the case owner, and the HR agent or HR group to which the ticket case is assigned. To protect sensitive data, make sure to advise employees to limit case access to HR queues and HR agents.
- To prevent access to sensitive HR information, don't mirror your HR Service Center role hierarchy to your org chart. Role hierarchy works together with sharing settings to determine the levels of access users have to your Salesforce data. Hierarchical roles allow employees to access data of all users directly below them in the hierarchy. To help provide a secure HR solution, the HR Service Center package includes pre-set roles that are separated from the traditional role hierarchy structure.
- Set the Organization-Wide Defaults (OWD) for the Case object to private. Salesforce strongly recommends keeping the OWD set to private.
- The system admin is responsible for the security of the system and has access to all data and private information. Make sure your existing security policies and incident handling are handled by trusted individuals.

Assign Record Types for HR Service Center

Assign case record types to the System Admin, then enable access and set field-level security for knowledge articles.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Assign Record Types to the System Admin Profile
The tab settings and object permissions for the System Admin profile are customized when you install the Employee Concierge package.

Assign Record Types to the HR Service Agent Profile
To complete the setup, assign the record types for the Case and Knowledge objects to the service agent profile.

Remove or Disable Existing HR Knowledge Articles
Existing Concierge installations include an HR knowledge article. When you install the HR Service Center packages, an additional knowledge article record type is installed.

Assign Record Types to the System Admin Profile

The tab settings and object permissions for the System Admin profile are customized when you install the Employee Concierge package.

Assign the following case types to the system admin.

- HR - Benefits
- HR - Employee Relations
- HR - General
- HR - Leave
- HR - Onboarding
- HR - Payroll

1. To assign record types to the Case object for the system admin, follow these instructions: Assign Record Types to the System Admin Profile.
2. Under Record Types and Page Layout Assignments, make these selections using the HR case types:
   - Assigned Record Types and Default Record Type.
   - Page Layout Assignment.
   - Deselect all other options.

Assign Record Types to the HR Service Agent Profile

To complete the setup, assign the record types for the Case and Knowledge objects to the service agent profile.

You can create an HR Service Agent profile to help differentiate the job duties between the system admin and HR agent.

1. From Service Setup, use Quick Find to search for and select **Profiles**.
2. From the Profiles table, click **HR Service Agent**.
3. Under Apps, click **Object Settings**.
4. Find and select **Knowledge**.
5. Click **Edit**.
6. Under Tab Settings, set **Default On**.
7. Under Record Types and Page Layout Assignments, make these selections:
   - Assigned Record Types
   - Assigned Record Type and Default Record Type
   - Under Object Permissions, enable Read and Edit.
8. Save your changes.
9. Repeat for the Case object.

Remove or Disable Existing HR Knowledge Articles

Existing Concierge installations include an HR knowledge article. When you install the HR Service Center packages, an additional knowledge article record type is installed.

If you already created or have existing Knowledge articles with the HR_Knowledge_Articles record type, use the **Change Record Type** quick action to change them to one of new HR Services Center record types. After you change the record type, disable the existing HR_Knowledge_Articles record type.

SEE ALSO:

Enable Knowledge Access for Knowledge Authors

Add Custom Fields to Knowledge Page Layout

Make Custom Fields for Knowledge Articles Visible

Configure HR Service Center Ticket Assignments

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

During the installation process, public groups and queues are added to your org.

Add users to public groups to enable access to a particular case record type and queue. By taking these steps, the information is accessible only to the members of the appropriate public group.

The following groups and queues are added.

- HR - Benefits
- HR - Employee Relations
- HR - General
- HR - Leave
- HR - Onboarding

- HR - Payroll

Considerations

- The employee who created the case has access to that case regardless of which HR queue the case gets assigned to.
- If an agent creates a case on behalf of the employee, for example when the employee called in to report an issue, the case record type determines which queue gets assigned as the owner.
- As an employee, if an HR agent files an employee relations case that includes sensitive information such as improper conduct reports or disciplinary actions, the agent's peers in the HR: Employee Relations group have visibility to the case.

Set Share Settings
As the admin, set the security share settings.

Add HR Service Agents to Groups
As the admin, add the HR Service agent user to the built-in groups.

Create Assignment Rules
The recommended support model for HR Service Center is that all non-sensitive cases are first triaged by an HR - Generalist who can then move cases to one of the specialists queues as needed.

Set Assignment Rules as the Default for New HR Tickets
To ensure that all new tickets are assigned to a queue, including tickets created in the HR Service Center app, create a new case page layout, then set assignment rules.

Enable or Disable Email Notifications
Turn email notifications on or off for employees when they're assigned a new onboarding task.

Confirm the Role Hierarchy
Role hierarchy works together with sharing settings to determine the levels of access users have to your Salesforce data. In most cases, the Salesforce hierarchical roles allow employees access to data of all the users directly below them in the hierarchy. To ensure a secure solution, confirm that your role hierarchy is flat, with each HR Service Center persona on a separate level.

Create Sharing Rules for Tickets (Optional)
HR cases are owned or assigned to either a queue or a user. After an HR Service Agent accepts a case, the agent is the case owner. To give another HR Service Agent access to cases, you can optionally create a criteria-based sharing rule. The sharing rule grants sharing of the case with the public group in which the HR Service Agent is a member.

SEE ALSO:

My Support Tickets Page and Service Console Case Feed Access Considerations

Service Console Case Feed Accessibility for Employee Users Who Are Service Agents

My Support Tickets Page and Service Console Case Feed Access Considerations

Service Console Case Feed Accessibility for Employee Users Who Are Service Agents

Set Share Settings

As the admin, set the security share settings.

1. From Setup, use Quick Find to search for and select **Sharing Settings**.
2. Click **Edit**.

3. Set the sharing defaults as follows:

Object	Default Internal Access	Default External Access
Account, Contract, and Asset	Public Read Only	Private
Case	Private	Private
Employee	Public Read Only	Private
OnboardingTask__c and OnbardingTemplate__c	Public Read/Write	Private

4. Save your changes.

Add HR Service Agents to Groups

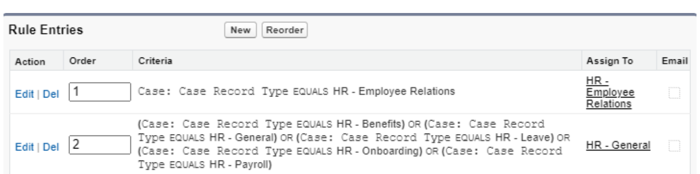
As the admin, add the HR Service agent user to the built-in groups.

1. From Setup, use Quick Find to search for and select **Public Groups**.
2. Click **Edit** next to HR - Benefits.
3. From the Search dropdown, select **Users**.
4. From the Available Members box, select the HR agents to be added to the group.
5. Click **Add**.
6. Click **Save**.
7. Repeat for each HR group.

Create Assignment Rules

The recommended support model for HR Service Center is that all non-sensitive cases are first triaged by an HR - Generalist who can then move cases to one of the specialists queues as needed.

1. From Service Setup, use Quick Find to search for and select **Case Assignment Rules**.
2. Click the HR case assignment rule.
3. Confirm the Sort Order field is 1 for the case type HR - Employee Relations.
4. Confirm that the additional HR rule is set to the HR - General group for the remaining HR case types.


Rule Entries New Reorder

Action	Order	Criteria	Assign To	Email
Edit | Del	1	Case: Case Record Type EQUALS HR - Employee Relations	HR - Employee Relations	
Edit | Del	2	(Case: Case Record Type EQUALS HR - Benefits) OR (Case: Case Record Type EQUALS HR - General) OR (Case: Case Record Type EQUALS HR - Leave) OR (Case: Case Record Type EQUALS HR - Onboarding) OR (Case: Case Record Type EQUALS HR - Payroll)	HR - General	

SEE ALSO:

Overview of Features to Protect Access to Sensitive HR Data

Set Assignment Rules as the Default for New HR Tickets

To ensure that all new tickets are assigned to a queue, including tickets created in the HR Service Center app, create a new case page layout, then set assignment rules.

1. From Service Setup, click **Object Manager**.
2. Click **Case**.
3. Click **Case Page Layouts**.
4. Click **New** and enter *HR* for the Page Layout Name.
5. Click **Save**.
6. In the HR page layout, click **Layout Properties**.
7. Under Case Assignment Checkbox, select **Default** and deselect **Show on edit page**.
8. To save your changes, click **OK**.

Enable or Disable Email Notifications

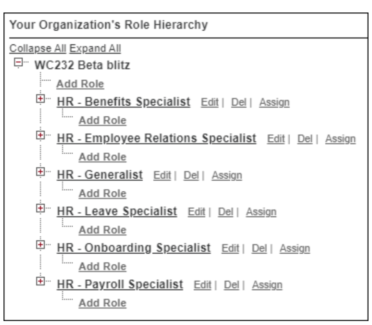
Turn email notifications on or off for employees when they're assigned a new onboarding task.

1. From Service Setup, in the Quick Find box, enter `Activity Settings`, and then select **Activity Settings**.
2. Select **Enable User Control over Task Assignment Notifications**.
3. Click **Submit**.
4. To disable email notifications, uncheck **Email me when someone assigns me a task**, then click **Submit**.

Confirm the Role Hierarchy

Role hierarchy works together with sharing settings to determine the levels of access users have to your Salesforce data. In most cases, the Salesforce hierarchical roles allow employees access to data of all the users directly below them in the hierarchy. To ensure a secure solution, confirm that your role hierarchy is flat, with each HR Service Center persona on a separate level.

Note: Don't mirror your role hierarchy to your org chart. HR Service Center requires roles that aren't classified hierarchically.



SEE ALSO:

Overview of Features to Protect Access to Sensitive HR Data

Create Sharing Rules for Tickets (Optional)

HR cases are owned or assigned to either a queue or a user. After an HR Service Agent accepts a case, the agent is the case owner. To give another HR Service Agent access to cases, you can optionally create a criteria-based sharing rule. The sharing rule grants sharing of the case with the public group in which the HR Service Agent is a member.

1. From Service Setup, use Quick Find to search for and select **Sharing Settings**.
2. Under Case Sharing Rules, click **New**.
3. In Step 1, enter `HR Case Sharing` as the label.
4. In Step 2, select **Based On Criteria**.
5. In Step 3, enter these settings:
   - Field: **Case Record Type**
   - Operator: **Equals**
   - Value: **HR- Employee Relations**
6. In Step 4, share with the public group **HR - Employee Relations Specialists**.
7. In Step 5, set the case access to **Read/Write**, allowing agents to edit cases they don't own.
8. Save your changes.
9. Repeat for each HR group.

SEE ALSO:

Overview of Features to Protect Access to Sensitive HR Data

Configure Your Org to Use the Health Verification Flow

As an HR Service Center administrator, you must configure your org for the Health Verification flow to work. Configuring your org involves creating the authorization form text record and updating the Health Verification flow with the authorization form text ID.

Here's how to create an authorization form text record.

1. From the App Switcher, search for and select **Authorization Form Text**.
2. Click **New**.
   a. In the **Name** field, enter `Terms and Conditions`.
   b. In the **Authorization Form** field, search for and select `New Authorization Form`.
   c. Enter this information in the New Authorization Form page.
      a. In the **Name** field, enter `Terms and Conditions`, and leave all other fields blank.
      b. Save your work, and return to the New Authorization Form Text page.
   d. Save your work, and return to the New Authorization Form Text page.
3. To create the Authorization Form Text Record, click **Save**,
   The Authorization Form Text Record is displayed.

   Copy the Authorization Form ID from the URL.
4. Copy the Authorization Form ID from the URL.

The Authorization Form ID is the 18-character alphanumeric string that appears in between the `/AuthorizationFormText` and the `/View` portion of the URL. For example, the text displayed in bold is what you copy:

```
/AuthorizationFormText/0cN2i000000CatxEAC/View
```

After you copy the authorization form ID, you're ready to configure the [Sample] Health Verification flow with it.

Configure the [Sample] Health Verification Flow with the Authorization Form Text ID
To use the [Sample] Health Verification Flow, you must configure it with the authorizationFormTextID.

Configure the [Sample] Health Verification Flow with the Authorization Form Text ID

To use the [Sample] Health Verification Flow, you must configure it with the authorizationFormTextID.

When you configure the Health Verification flow with the authorization form text ID, the HR Service Agent can use the flow to create onboarding tasks or articles.

Note: The Health Verification flow doesn't work without the authorization form text ID.

Here's how to configure the [Sample] Health Verification Flow with the Authorization Form Text ID.

1. From your org, select **Setup**.
2. Search for and select **Flows**.
3. Select the **[Sample] Health Verification** flow.
4. In the Manager palette on the left, search for or scroll to **authorizationFormTextID** and select it.
5. In the Body field, paste the Authorization Form Text ID from when you configured your org to use the [Sample] Health Verification flow.
6. Save and activate the flow.

Set Up the HR Service Center App

To complete the setup for HR Service Center, assign and share the custom list view.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Share an HR Case List View with the Relevant Public Group
The HR Service Center app includes a custom list view for HR cases. Share this list view with the HR public groups so your HR agents have access to it.

Manage Person Accounts and Employee Records
Support tickets that are created by or for employees are stored and managed as case records. HR Service Center uses person accounts to associate employee data with cases.

Create Ticket Categories (Optional)
By default, HR Service Center includes six ticket categories. You can create additional categories to allow employees and HR agents to create more ticket types. To add ticket categories to your org, complete all configuration steps in this section. Adding ticket categories is optional.

Prepare Your Team and Customize HR Service Center
Users have different access, based on their persona and related permissions and licenses. You can also edit or add to the default configuration to best meet your organization's needs.

Publish Knowledge Articles for Employees

Use Salesforce Knowledge to communicate key company policies to employees and reduce the burden on HR staff. To save you time, HR Service Center provides a series of sample knowledge articles that address common employee questions. Customize the articles to meet your needs.

Connect HR Service Center to Workday

Connect HR Service Center to Workday so you can create flows that reflect information from an employee's Workday account. For example, let employees check their PTO balance or verify that they've set up direct deposit correctly in Workday.

Use Flows to Automate HR Processes

HR Service Center provides a series of sample flows that you can customize and activate to meet your business needs. A flow can be associated with an onboarding task or linked from a knowledge article.

Activate the Case Flexipage and Page Layout

Apply the case flexipage and page layout for select profiles, apps, and record types.

Customize HR Service Center Service Catalog Item Samples

The HR Service Center Service Catalog Samples Package (optional) includes these out of the box HR catalog items: Request Leave, Request Relocation, Notify of Resignation, Verify Employment, Report Payroll Issue, and Report Expense Issue.

Service Catalog Case Elements

Review the service catalog and create case elements that are provided to you. You can use these elements to customize the Catalog Item details. The sample HR catalog items are designed to work with the out of the box fulfillment flow Service Catalog Create Case. You can configure the case field values for this service catalog item.

Configure HR Service Center Data Collection

Salesforce collects anonymous data to understand product use. You can choose to opt out of this by deleting the scheduled job.

Share an HR Case List View with the Relevant Public Group

The HR Service Center app includes a custom list view for HR cases. Share this list view with the HR public groups so your HR agents have access to it.

1. From the App Launcher, search for and select **HR Service Center**.
2. From the console navigation tab, select **Cases**.
3. Select the **HR Benefits** list view.
4. To open the list view controls, click the gear icon and select **Sharing Settings**.
5. Select **Share list view with groups of users**, then search for and select **HR Benefits Specialist**.
6. Save your changes.
7. Repeat for each HR group.

Manage Person Accounts and Employee Records

Support tickets that are created by or for employees are stored and managed as case records. HR Service Center uses person accounts to associate employee data with cases.

SEE ALSO:

Create Person Accounts for Employee Records

Employee to Person Account Field Mapping

Create Ticket Categories (Optional)

By default, HR Service Center includes six ticket categories. You can create additional categories to allow employees and HR agents to create more ticket types. To add ticket categories to your org, complete all configuration steps in this section. Adding ticket categories is optional.

SEE ALSO:

Add Ticket Category Picklist Values

Add a Quick Action to the Contact Object

Add the Custom Metadata Type for the New Ticket Category

Prepare Your Team and Customize HR Service Center

Users have different access, based on their persona and related permissions and licenses. You can also edit or add to the default configuration to best meet your organization's needs.

SEE ALSO:

Share Resources with Employee Concierge Users

Create a Custom Process for Manage Support Cases

Publish Knowledge Articles for Employees

Use Salesforce Knowledge to communicate key company policies to employees and reduce the burden on HR staff. To save you time, HR Service Center provides a series of sample knowledge articles that address common employee questions. Customize the articles to meet your needs.

Important: The articles are published to your knowledge base automatically, so review the contents of each article. They contain sample text that might not be true for your company. If an article isn't relevant to you, archive it. Otherwise, edit and re-publish the article.

The following articles are included in HR Service Center (version 2.0 and above).

Article Title	Description
(Sample article) Credit card not accepted for medical payments	Explains what to do if the employee's preferred payment method isn't accepted for medical payments.
(Sample article) Discrimination-free workplace	Describes the company policy on harassment and discrimination.
(Sample article) Request paid time off (PTO)	Explains how to request PTO and check your PTO balance in Workday.
(Sample article) Essentials for new employees	Describes the company onboarding process.
(Sample article) Set up or update direct deposit in Workday	Explains how to set up, verify, and update direct deposit in Workday.

Connect HR Service Center to Workday

Connect HR Service Center to Workday so you can create flows that reflect information from an employee's Workday account. For example, let employees check their PTO balance or verify that they've set up direct deposit correctly in Workday.

1. Choose a user who will manage the integration with Workday, and give the user access to the following APIs in Workday:
   - Get_Payees
   - Get_Time_Off_Plan_Balances

   For security reasons, we recommend restricting the integration user's access to apply to those specific APIs, and providing the minimum access level needed, which is read access.
2. Add the integration user as a named credential in Salesforce.
   a. In Setup, go to **Named Credentials** and click **New Named Credential**.
   b. Complete the settings as follows.
      - Label: `HRSC Workday`
      - API Name: `HRSC_Workday_API`
      - URL: Enter your workday instance URL.
      - Identity Type: `Named Principal`
      - Authentication Protocol: `Password Authentication`
      - Username: Enter your workday integration username.
      - Password: Enter your workday integration user password.
      - Generate Authorization Header: Select this option.
      - Allow Merge Fields in HTTP Body: Select this option.

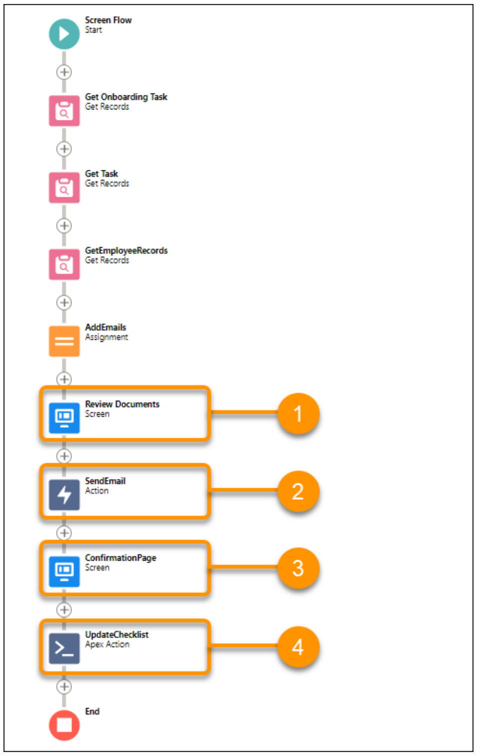
   c. Save your changes.

Use Flows to Automate HR Processes

HR Service Center provides a series of sample flows that you can customize and activate to meet your business needs. A flow can be associated with an onboarding task or linked from a knowledge article.

For example, the sample Review Documents flow includes the following components.

1. A Review Documents Screen component with a link that opens documents for new employees to review, such as a non-disclosure statement. The user clicks a checkbox, then acknowledging they've reviewed the document.
2. A SendEmail Action component that sends a confirmation email to the manager and the new employee.
3. A ConfirmationPage Screen component that shows that the task is complete.
4. An UpdateChecklist Apex Action component that enables the system to change the task status to complete.



[Sample HR Service Center Flows](#)
HR Service Center provides a series of sample flows to get you started.

[Link to Relevant Flows Directly from Knowledge Articles](#)
Link knowledge articles with relevant flows to create an efficient, easily discoverable way to initiate key processes directly from a knowledge article. For example, let's say employees want to complete an ergonomic assessment of their home office. When they search from concierge, the returned article can include a button that launches the ergonomic assessment flow.

[Add the Flow Launch Button to the Knowledge Article Layout](#)
Add the flow launch component to the page in the experience site.

Sample HR Service Center Flows

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

HR Service Center provides a series of sample flows to get you started.

Flow Name	Purpose	Considerations
[Sample] Apply for a Corporate Credit Card	Let employees apply for a corporate credit card.	None.
[Sample] Ergonomic Assessment	Let employees complete an ergonomic assessment.	This flow includes metadata functionality for filing a case as a given case record type (HR - General). If you change the metadata, you must modify the flow accordingly.

Flow Name	Purpose	Considerations
[Sample] Welcome Video	Show a welcome video.	If a flow includes a video, use embedded code to allow the video to display as it does in the original source. For example, https://www.youtube.com/embed/*watchVideo*
[Sample] Review Documents	Provide links to documents for employees to review and acknowledge, and email the employee's manager when complete.	None.
[Sample] Health Verification	Let employees provide proof of their COVID-19 status—for example, by uploading an image of their vaccination card or evidence of a positive test and recovery.	To use the [Sample] Health Verification flow, you must configure your org. For help, see Configure Your Org to Use the Health Verification Flow. on page 202 To understand the high-level configuration task flow for collecting health verifications with the Employee Health Verification managed package, see Collect Health Verifications to Return to Work
[Sample] Verify Direct Deposit in Workday	Let employees confirm that they have set up direct deposit correctly in Workday.	To use this flow, complete the steps in Connect HR Service Center to Workday.
[Sample] Workday Time Off Balance	Let employees check their paid time off (PTO) balance in Workday.	To use this flow, complete the steps in Connect HR Service Center to Workday.
Request Leave	Let employees request time off	None.
Verify Employment	Let employees certify employment	None.
Report Payroll Issue	Let employees relay payroll discrepencies	None.
Report Expense Issue	Let employees relay expense discrepancies	None.
Request Relocation	Let employees submit new location preference	None.
Notify of Resignation	Let employees identify last day with resignation letter.	None.

Here's how to modify and activate a sample flow.

1. From Setup, use Quick Find to search for and select **Flows**.
2. Click **New Flow**.
3. Click **All + Templates**.
4. Select a Salesforce sample flow template.
5. Modify the flow to meet your business needs.
6. Save and activate the flow.

From there, you can associate a flow with an onboarding task to display it in a checklist to employees, or link to a flow in a knowledge article.

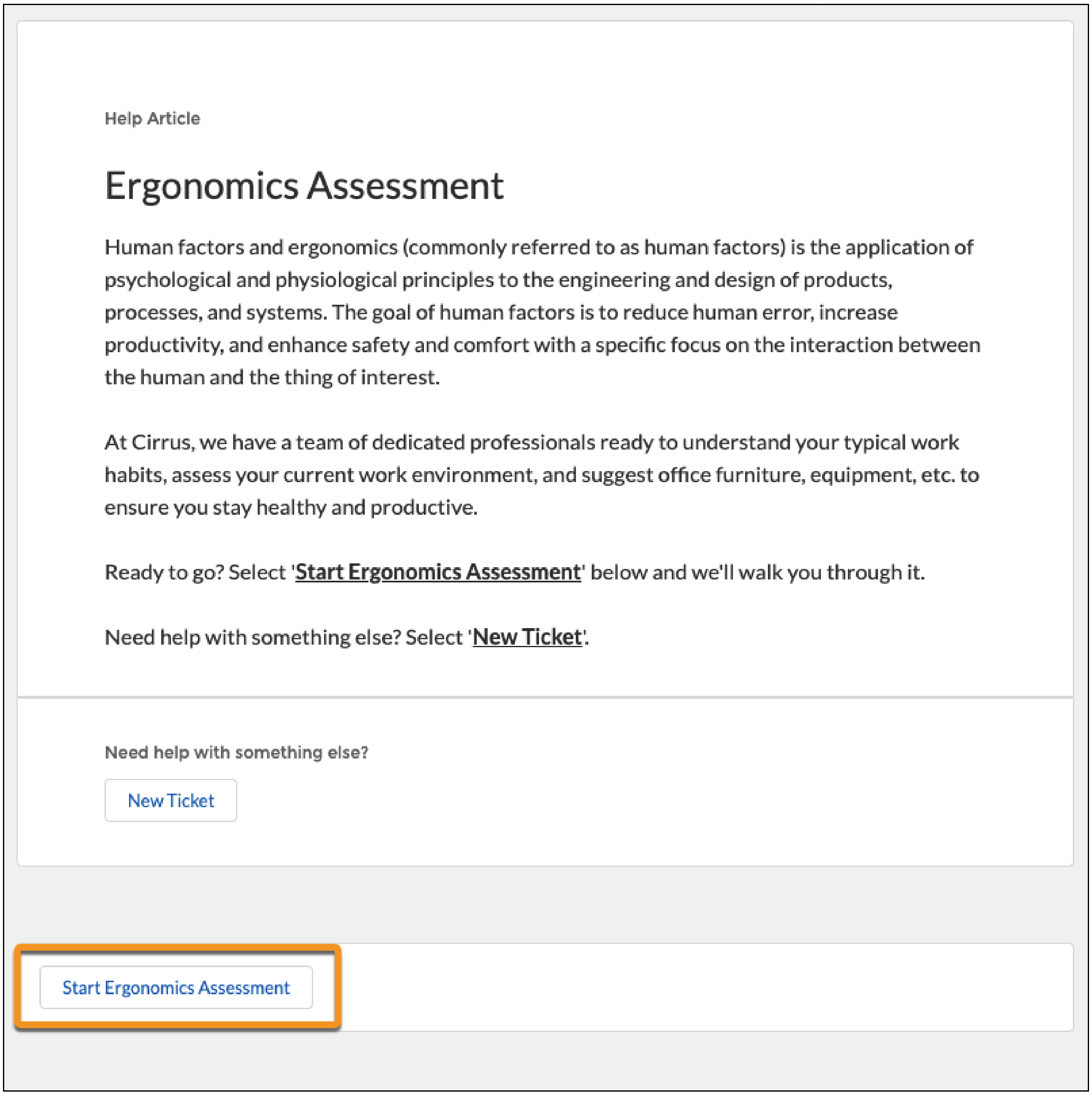
Link to Relevant Flows Directly from Knowledge Articles

Link knowledge articles with relevant flows to create an efficient, easily discoverable way to initiate key processes directly from a knowledge article. For example, let's say employees want to complete an ergonomic assessment of their home office. When they search from concierge, the returned article can include a button that launches the ergonomic assessment flow.

EDITIONS

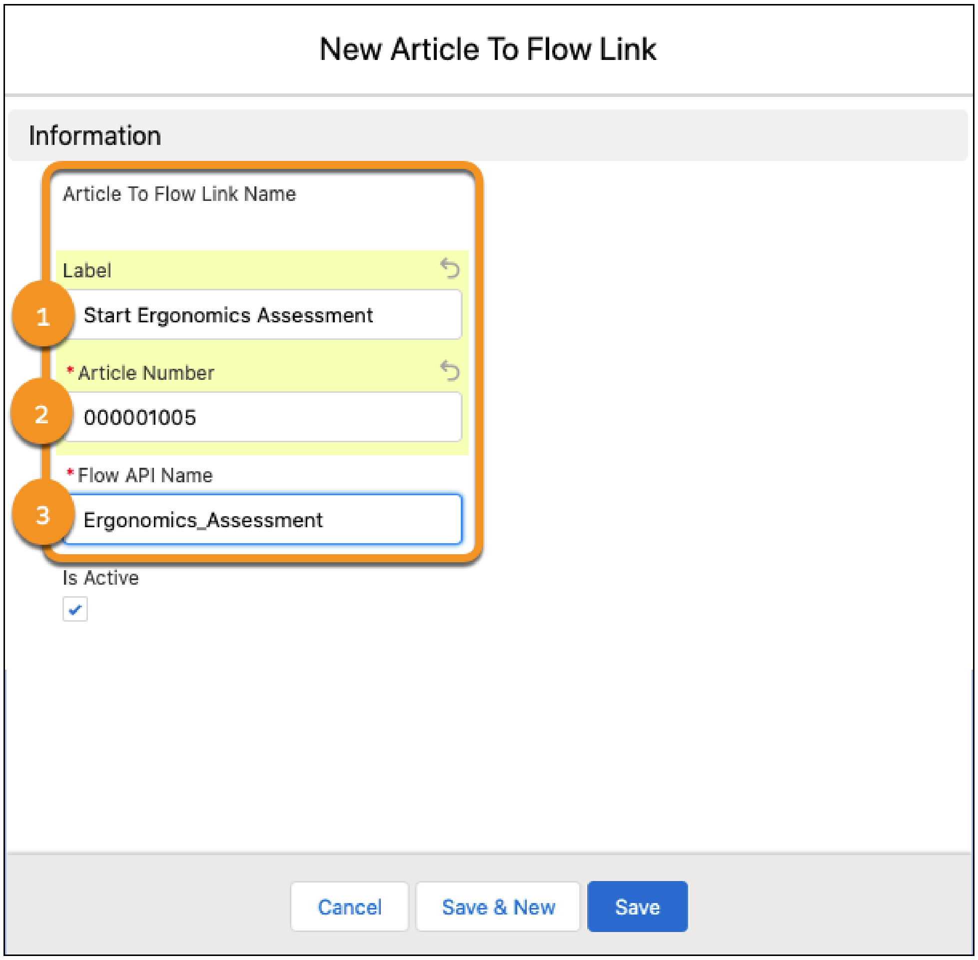
Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

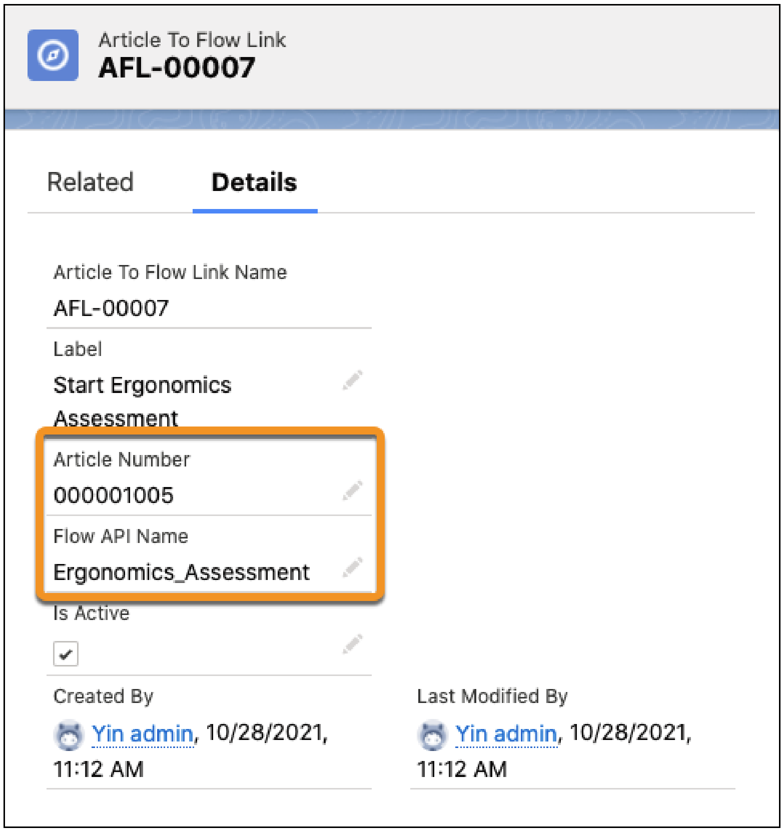


To links flows with your knowledge articles, you must have an active flow and knowledge articles in your Experience Cloud site.

1. From the HR Service Center, select **Article to Flow Links** from the navigation menu.
2. Click **New**.
3. Enter a label (1), article number (2), and flow API name (3). The label appears on the button to launch the flow, so we recommend something that clearly communicates the purpose of the flow.



4. Click **Save**.



Note: You can add more than one button to a knowledge article to launch different flows.

Add the Flow Launch Button to the Knowledge Article Layout

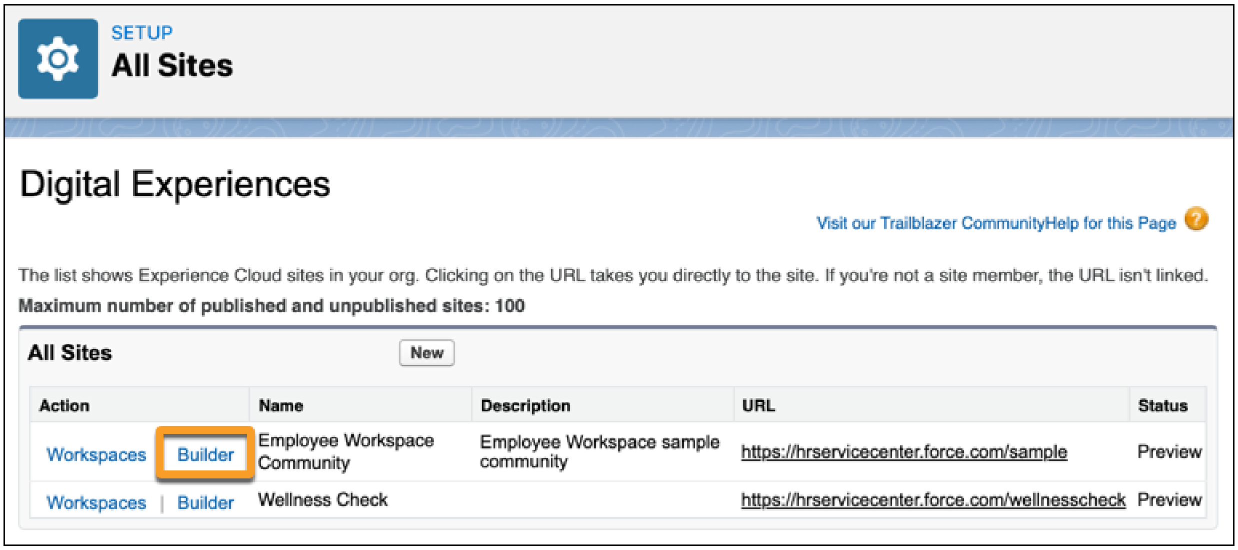
Add the flow launch component to the page in the experience site.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and select **All Sites**.
2. For the Employee Workspace Community site, click **Builder**.

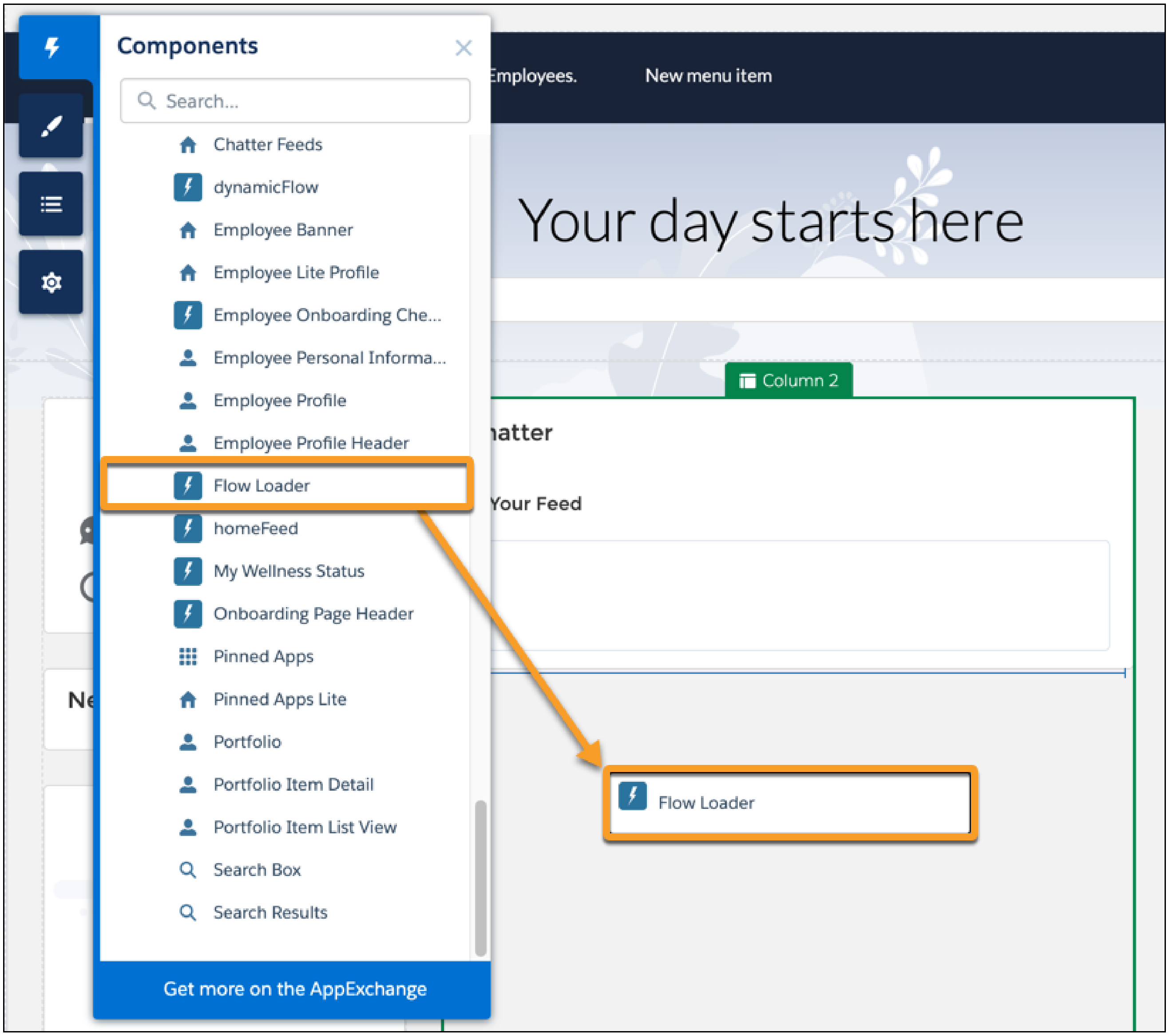
EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions



3. In Builder, select **Pages**, and then select **Article**.
4. From the Components panel, search for `Flow Modal Loader` and `Flow Modal Listener`. Drag them to the bottom of the content pane.



5. Click **Save**, and then click **Publish**.

Activate the Case Flexipage and Page Layout

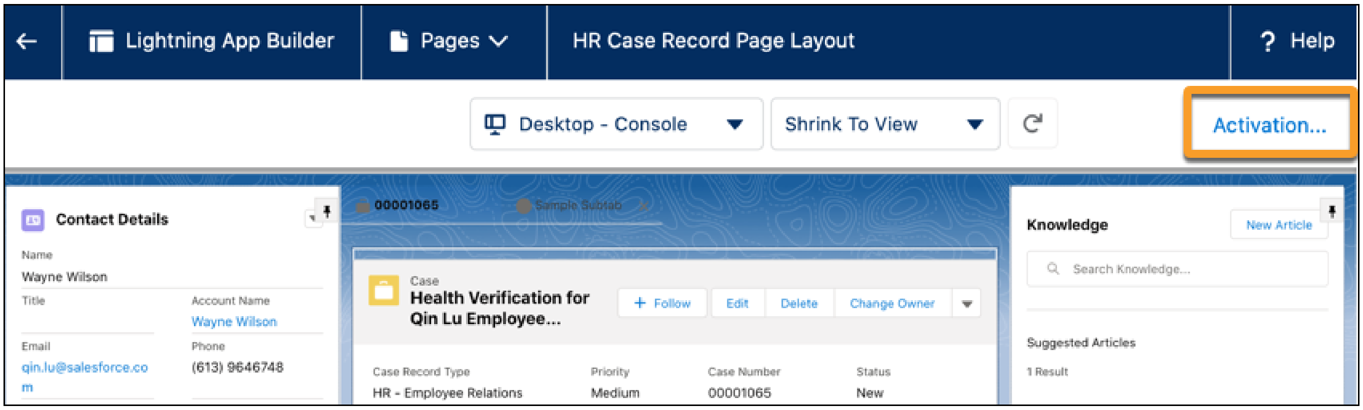
Apply the case flexipage and page layout for select profiles, apps, and record types.

1. From Setup, in the Quick Find box, enter `Lightning App Builder`, and select **Lightning App Builder**.
2. From the Lightning Pages List, find the HR Case Record Page Layout and click **View**.
3. Click **Activation**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions



4. On the App, Record Type, and Profile tab, select **Assign to Apps, Record Types, and Profiles**.
5. Check the HR Service Center, and click **Next**.
6. For Select Form Factor, click **Next**.
7. For Selected Record Types, select all the HR record types, and click **Next**.
8. For Select Profiles, select the profiles that you use for your HR Service Agents, and then click **Next**.
9. Review your assignments, and click **Save**.

Customize HR Service Center Service Catalog Item Samples

The HR Service Center Service Catalog Samples Package (optional) includes these out of the box HR catalog items: Request Leave, Request Relocation, Notify of Resignation, Verify Employment, Report Payroll Issue, and Report Expense Issue.

You can change the item name and description, primary category, and case type. You can also add questions and change permissions.

1. From Setup, in the Quick Find box, enter `Service Catalog`, and select **Service Catalog**.
2. Click **Get Started**
3. Under Human Resources, find the catalog item that you want to edit.
4. Next to the item, click the dropdown arrow, and select **Edit**.
5. You can change the item name, description, and image.
6. You can change the question label type, whether it's required, and show preview text for employees.
7. Click **Done**.
8. By default, everyone has access to a created catalog item. To restrict case type access, select **Groups** and select the groups that can have.
9. Click **Save**.

Service Catalog Case Elements

Review the service catalog and create case elements that are provided to you. You can use these elements to customize the Catalog Item details. The sample HR catalog items are designed to work with the out of the box fulfillment flow Service Catalog Create Case. You can configure the case field values for this service catalog item.

Table 7: Fulfillment Flow Input Variables

Name	Description
Case Status	Sets the default status of the resulting case.
Case Priority	Sets the default priority of the resulting case.. Default is Medium.
Case Record Type Developer Name	Determines the record type of the resulting case, which assigns a queue. via the active assignment rule. For example, setting this as HR_General results in the case being routed to the "HR - General" queue, per the out of the box configuration.
Case Origin	Sets the default case origin of the resulting case.
Case Subject Prefix	This value is prepended to the case subject. You can use this to map resulting cases back to the specific catalog item that an employee used to create it.
Queue Developer Name	If the 'Queue' value is empty (default), then queue assignment is driven by the case record type (see Case Record Type Developer Name above) and the active assignment rule. You can choose to bypass the assignment rule by populating the queue API name in this field.

Configure HR Service Center Data Collection

Salesforce collects anonymous data to understand product use. You can choose to opt out of this by deleting the scheduled job.

1. From Setup, in the Quick Find box, enter `Scheduled Jobs`, and select it.
2. Next to the scheduled job 'HRSC log metrics', click **Delete**.
3. In the confirmation window, click **Yes**.

Employee Onboarding

You can use HR Service Center to assign and track onboarding activities for new hires. To streamline the process, you can create templates that are based on an employee's role or required tasks. After onboarding tasks are assigned, you can run reports in Salesforce to confirm that onboarding tasks are completed. Using automated flows and templates, you can also customize onboarding tasks based on role, such as for corporate-level employees or specific international requirements.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Configure Onboarding Tasks
After you have modified or created onboarding flows, connect the flows to a task.

Configure Onboarding Templates
Onboarding templates allow you to assign specific onboarding tasks to an employee or group of employees for specific job requirements.

Join the Onboarding Task to a Template
After you create the onboarding tasks and templates, join a task to a template, which can then be assigned to new employees.

Add the Welcome Task Component to the Home Page
Add the Welcome Task component to employees' home page to allow access to their onboarding tasks.

Create the Onboarding Page

Employees access the onboarding flows and checklist within the Employee Workspace site. To make these features available to employees, create the HR onboarding page using Experience builder.

Add Onboarding Tasks to the Employee Record Page

Add the Employee Onboarding Tasks component to the Employee Record Page.

Add the Assign Onboarding Tasks Quick Action to the Employee Page Layout

Add the Assign Onboarding quick action to the Employee page layout for quick access. Depending on your organization's structure, this one-time setup task can be performed by the system admin.

Assign Onboarding Tasks to New Employees

As an HR onboarding agent, assign and track onboarding activities for new hires.

Assign Multiple Onboarding Tasks at Once

Assign onboarding activities to one or more employees in a single click.

Display or Hide Completed Onboarding Tasks

When an employee completes an onboarding task, they can hide the task from their onboarding task list.

Customize Your Onboarding Data Fields

You create separate display names and descriptions for agents and employees, position key onboarding tasks at the top of the list, and give specialized onboarding instructions to subsets of employees.

Configure Onboarding Tasks

After you have modified or created onboarding flows, connect the flows to a task.

1. From the App Launcher, find and select **HR Service Center**.
2. From the console navigation menu, select **Onboarding Task**.
3. Click **New**.
4. Enter a name for the task and a description.
5. Enter the **Start Day Offset**.

   Start Day Offset determines the sort order of onboarding tasks as they're displayed on the onboarding checklist in the Employee Workspace.

6. Enter the API name of the flow you want to associate with the task.

Configure Onboarding Templates

Onboarding templates allow you to assign specific onboarding tasks to an employee or group of employees for specific job requirements.

Multiple templates can be assigned to employees. For example, you can assign a template that contains a list of general tasks for every new employee, and then an additional template that contains tasks for the new employee's specific job function.

1. From the App Launcher, find and select **HR Service Center**.
2. From the console navigation menu, select **Onboarding Templates**.
3. Enter a name for the template.
4. Click **Is Active**.

Join the Onboarding Task to a Template

After you create the onboarding tasks and templates, join a task to a template, which can then be assigned to new employees.

1. From the App Launcher, find and select **HR Service Center**.
2. From the console navigation menu, select **Onboarding Templates Tasks**.
3. Click **New**.
4. Select an Onboarding Template.
5. Select an Onboarding Task or click New Onboarding Task to open a menu to create a new task.
6. Click **Is Active**.

Add the Welcome Task Component to the Home Page

Add the Welcome Task component to employees' home page to allow access to their onboarding tasks.

Depending on your organization's structure, this one-time setup task can be performed by the system admin.

1. From Service Setup, use Quick Find to search for and select **All Sites**.
2. Under Digital Experiences, click **Builder**.
3. From the top banner, make sure Home is selected.
4. Click the **Component** icon.
5. Drag the **Welcome Task** component to the page.
6. Click **Preview** to confirm the layout.
7. Click **Publish**.

The component disappears 30 days after the employee completes all of their tasks. If you want, you can customize this limit.

1. In Setup, go to **Custom Settings**.
2. Click **Manage** next to HRSC_Settings.
3. Click **New** above Default Organization Level Value.
4. Enter a number of days in the Welcome Task Visibility Offset setting.
5. Save your changes.

Create the Onboarding Page

Employees access the onboarding flows and checklist within the Employee Workspace site. To make these features available to employees, create the HR onboarding page using Experience builder.

Depending on your organization's structure, this one-time setup task can be performed by the system admin.

1. From Service Setup, use Quick Find to search for and select **All Sites**.
2. Under Digital Experiences, click **Builder**.
3. From the top banner, click **Home** and select **+ New Page**.
4. Select **Standard Page**.
5. Click **New Blank Page**.
6. Choose **Flexible Layout**, then click **Next**.
7. For the Name, enter `Onboarding Checklist`.

8. Accept the default URL.
9. For the API name, accept the default auto-generated API name **Onboarding_Checklist__c.**

   The API name must be Onboarding_Checklist__c and is case sensitive.
10. On the Onboarding Checklist page you created, click in Column 1 to update the details of the top section.
    - Column layout: single column (top-left option)
    - Column distribution: 12
    - Section Style
      - Section height: 380
      - Content width: 100%
11. Add another section with the following details.
    - Column layout: 2 columns
    - Column distribution: 4–8
    - Section Style
      - Section height: 300
      - Content width: 100%
12. Click the **Component** icon.
13. Drag the **Welcome Hero Banner** component to the top section.
14. Drag the **Employee Onboarding Checklist** component to the bottom-left section.
15. Drag the **Flow Loader** component to the bottom-right section.
16. To confirm the layout, click **Preview**.
17. Click **Publish**.

SEE ALSO:

Add a My Support Tickets Page to Your Workspace Site

Add a Knowledge Page to Your Workspace Site

Add New Tickets Component to the Workspace Site

Publish Your Employee Workspace Site

Create Custom Pages with Experience Builder

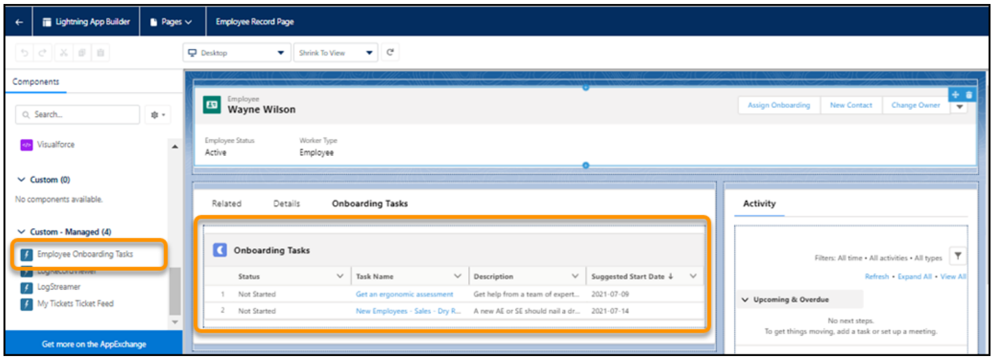
Add Onboarding Tasks to the Employee Record Page

Add the Employee Onboarding Tasks component to the Employee Record Page.

Depending on your organization’s structure, this one-time setup task can be performed by the system admin.

1. From Setup, use Quick Find to search for and select **Lightning App Builder**.
2. Click **Employee Record Page**.
3. Click **Edit**.
4. Click **Onboarding Tasks**.
5. Drag the **Employee Onboarding Tasks** component onto the page.

6. Click **Save**.



Add the Assign Onboarding Tasks Quick Action to the Employee Page Layout

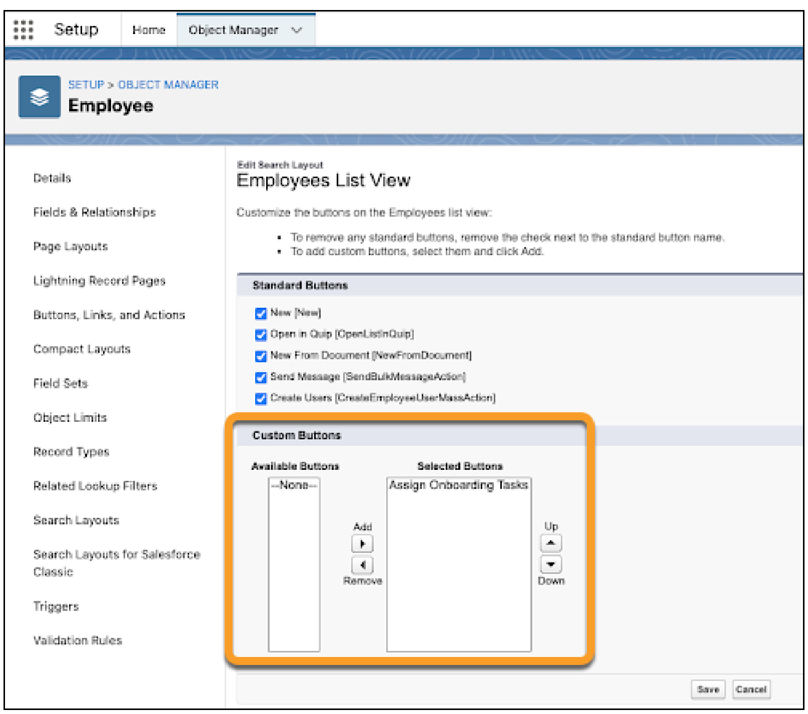
Add the Assign Onboarding quick action to the Employee page layout for quick access. Depending on your organization's structure, this one-time setup task can be performed by the system admin.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

1. From Setup, in the Quick Find box, enter `Object Manager`, and select **Object Manager**.
2. Under Objects, select **Employee**.
3. From the details menu, select **Search Layouts for Salesforce Classic**.
4. From the Layout menu, select **List View**.
5. Click **Edit**.
6. In Custom Buttons, move **Assign Onboarding Tasks** to Selected Buttons, and click **Save**.

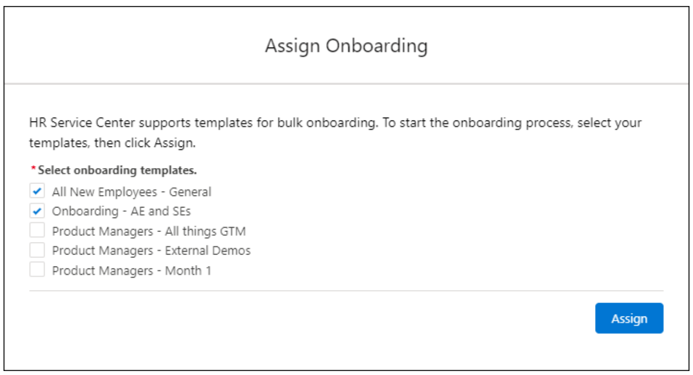


Assign Onboarding Tasks to New Employees

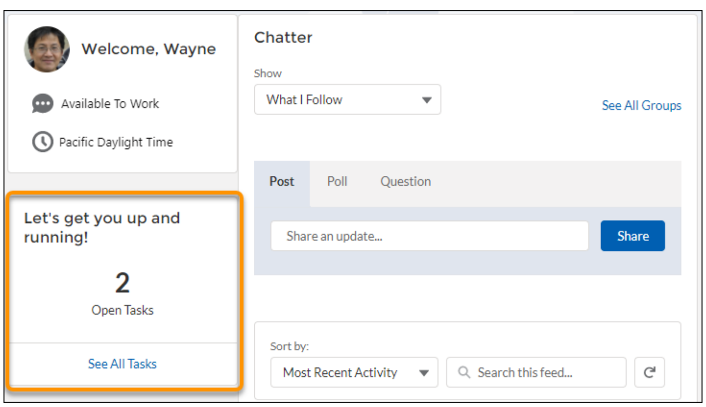
As an HR onboarding agent, assign and track onboarding activities for new hires.

1. From the App Launcher, find and select **Employees**.
2. Click the name of the new employee.
3. Click **Assign Onboarding**.

4. From the Assign Onboarding page, select the onboarding templates that apply to the new employee role and click **Assign**.



When the employee logs into Employee Workspace Community, all open tasks appear on their Home page.



Assign Multiple Onboarding Tasks at Once

Assign onboarding activities to one or more employees in a single click.

1. From the App Launcher, find and select **Employees**.
2. Select the employees that you want to assign onboarding tasks to, and click **Assign Onboarding Tasks**.
3. Select from the list of onboarding templates, and click **Assign Onboarding Tasks**.

All the tasks display on the employee's record page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Display or Hide Completed Onboarding Tasks

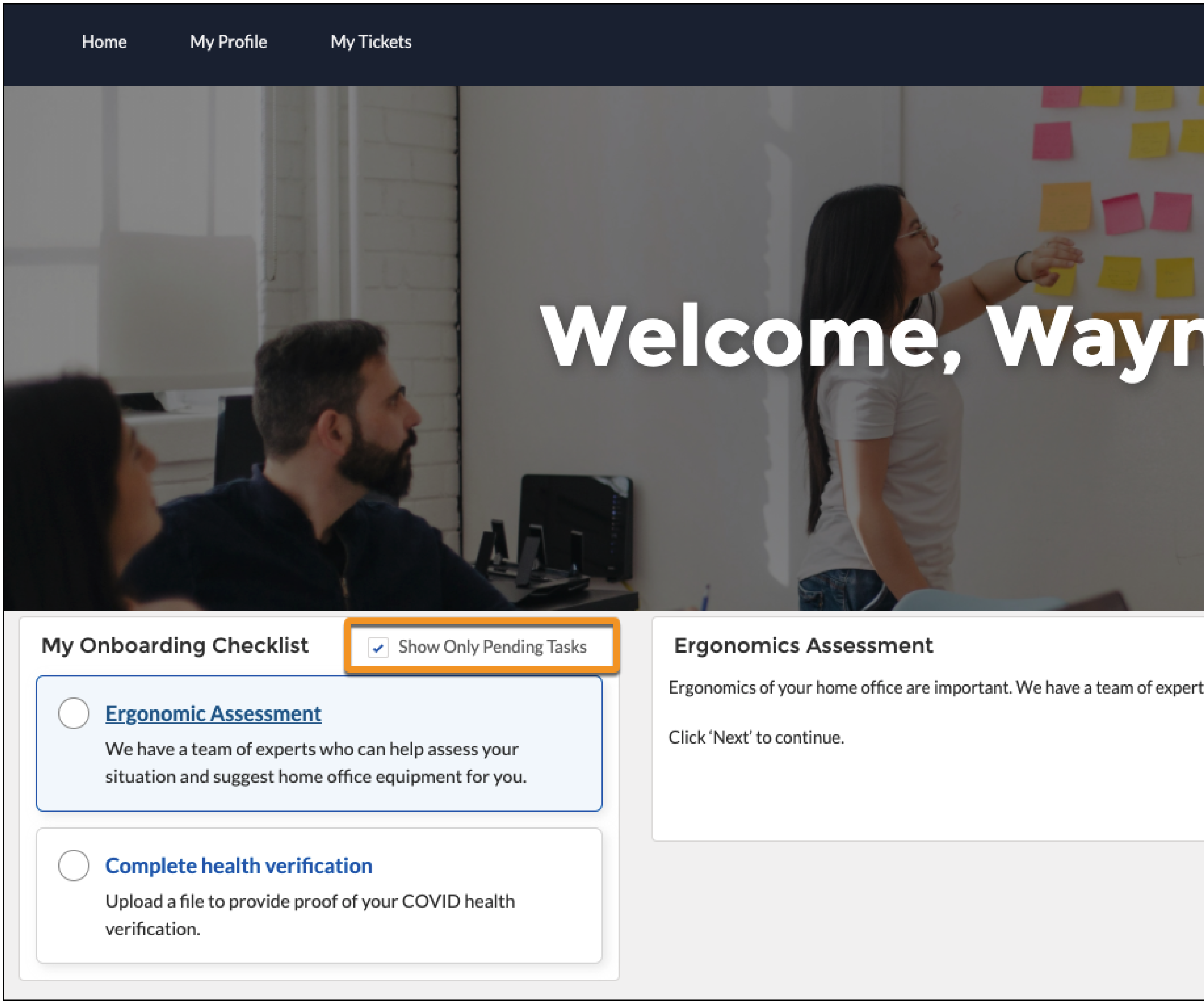
When an employee completes an onboarding task, they can hide the task from their onboarding task list.

Employees can control whether to hide completed tasks by selecting **Show Only Pending Tasks**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions



Customize Your Onboarding Data Fields

You create separate display names and descriptions for agents and employees, position key onboarding tasks at the top of the list, and give specialized onboarding instructions to subsets of employees.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Add a Display Name, Display Description, and Priority

Use display names and descriptions for employee-facing onboarding tasks lists. Set the priority for tasks on a specific date.

Add Specialized Instructions to a Task

You can include specific instructions for an employee or subset of employees based on their role.

Add a Display Name, Display Description, and Priority

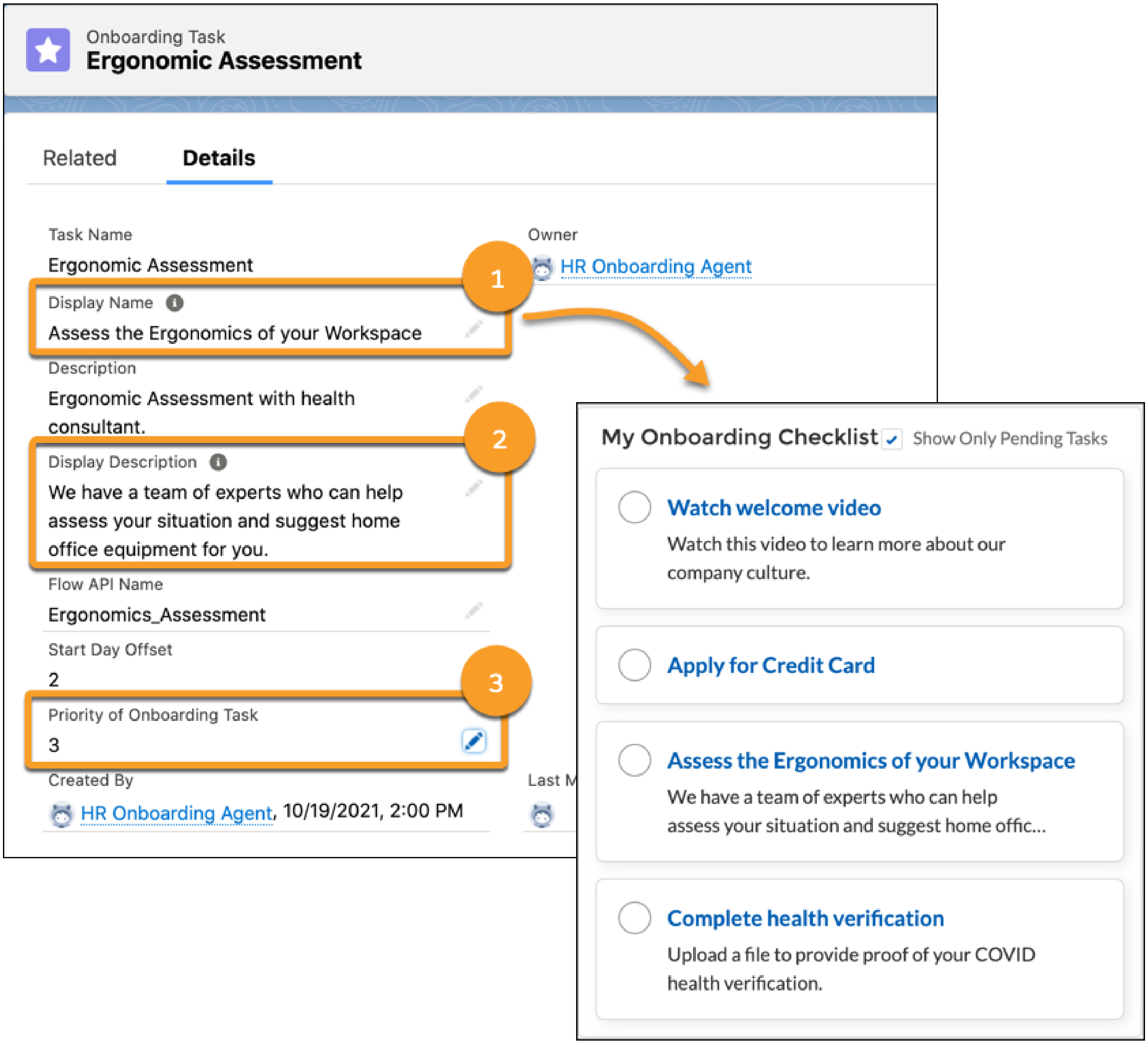
Use display names and descriptions for employee-facing onboarding tasks lists. Set the priority for tasks on a specific date.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

1. From the HR Service Center, select **Onboarding Tasks** from the navigation menu.
2. From the Onboarding Task list, select a task.
3. To add an employee facing name, click the pencil next to Display Name (1). Enter the display name, and click **Save**.



4. To add an employee facing description, click the pencil next to Display Description (2), and enter a description.
5. To prioritize the sort order of the onboarding task within a particular date, click the pencil next to Priority of Onboarding Task (3), and enter a priority number.

The custom name, description, and priority appear in the employee's onboarding checklist.

Add Specialized Instructions to a Task

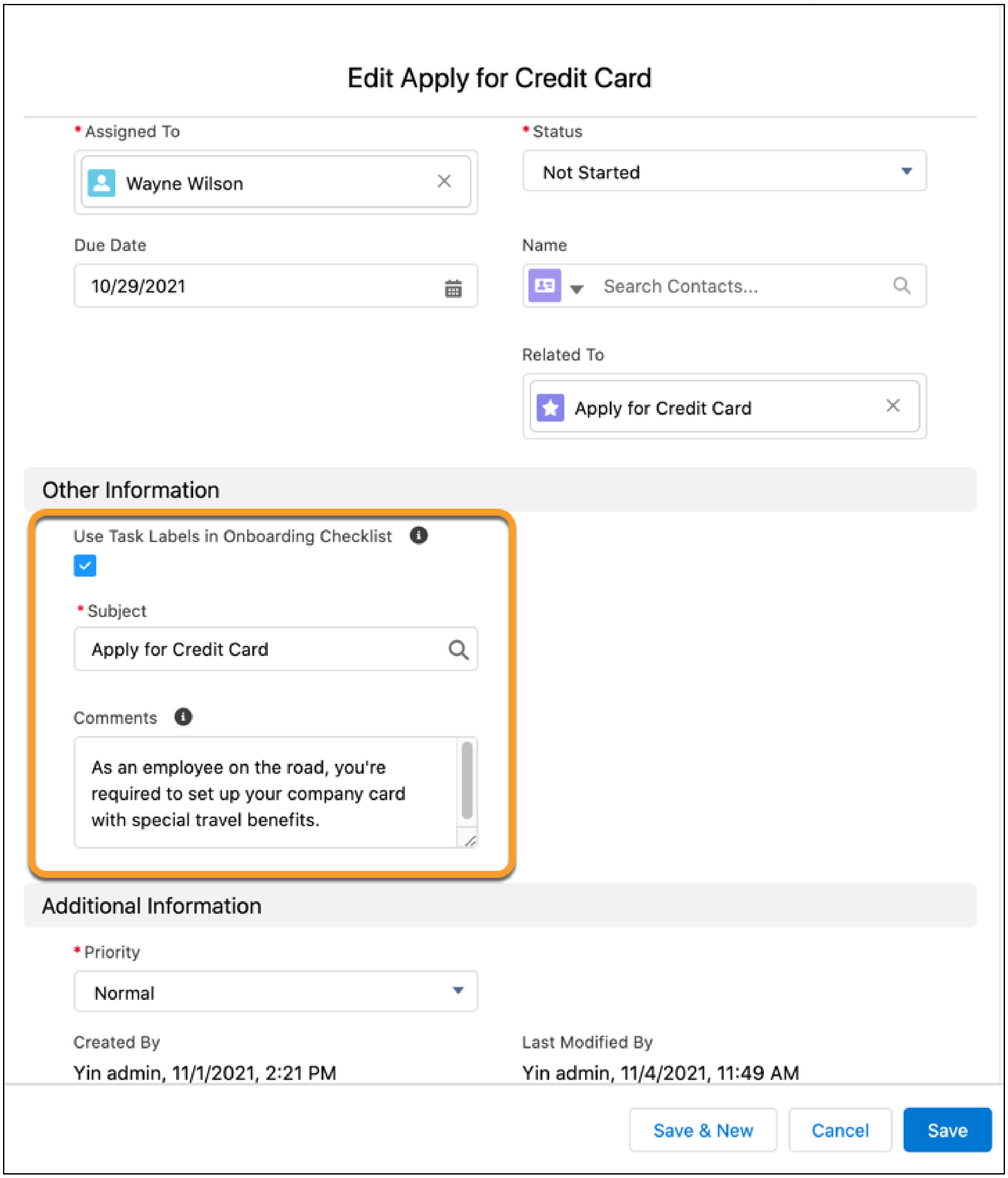
You can include specific instructions for an employee or subset of employees based on their role.

1. From the Task record assigned to the employee, click **Edit**.
2. Select **Use Task Labels in Onboarding Checklist**.
3. Enter the subject and description that you want to appear in the employee's task list.

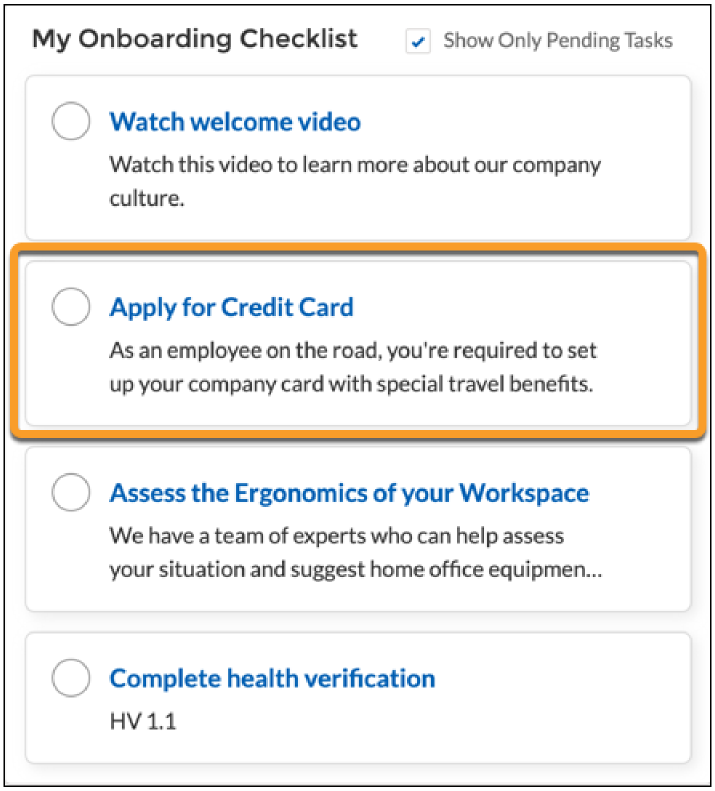
EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions



4. Click **Save**. The custom instructions are now linked to the employee's onboarding tasks.



Get Started with Employee Service Catalog

A service catalog is a portfolio of the products and services you provide to your employees. Employee Service Catalog helps you turn your employees' requests for those products and services into approved and documented orders.

EDITIONS

Available in: all editions

Install Employee Service Catalog

Employee Service Catalog comes included with the Employee Concierge managed package. For easiest access to Employee Service Catalog, use the Work.com installer to add Employee Concierge to your org.

Service Catalog Permissions

The Employee Productivity Plus add-on license or the IT Service Center and Endpoints add-on license is required in your org to grant access when configuring Employee Service Catalog. Assign new users the Service Catalog Builder or Service Catalog User permission set to get started. Administrators with Service Catalog Builder access can create, edit, and delete all catalog configuration, and can view and modify all generated requests. Users with Service Catalog User access can request items.

Create Your Service Catalog

Create your service catalog so that employees can browse for and order the items they need.

Create a Catalog Category

A catalog category represents groups of catalog items in the service catalog. You can organize categories under a primary category. You can create up to 200 categories—100 primary categories and 100 secondary categories. Categories can be sorted by dragging and dropping them in the Service Catalog Builder landing page.

Edit a Catalog Category

Edit an existing catalog category.

Delete a Catalog Category

You can only delete a catalog category if it has no assigned items. When all items are removed, a category can be deprecated and hidden from the UI, but still available for reporting.

Create a Catalog Item

Catalog items are pieces of metadata that represent items available in the service catalog. Items require an associated fulfillment flow and a primary catalog category. Primary and secondary categories can have up to 100 items. Your service catalog can have up to 1000 items. Items can be sorted by dragging and dropping them in the Service Catalog Builder landing page.

Edit a Catalog Item

Edit an existing catalog item.

Clone a Catalog Item

To streamline catalog item creation for your service catalog, clone an existing item.

Delete a Catalog Item

Deleting a catalog item clears up space in its associated catalog categories and hides it from users. However, the item is still available for reporting.

Catalog Item Fulfillment Flows

Catalog item fulfillment flows are the automation that makes processing user-generated requests simple. An item's fulfillment flow is a screen flow that you assign to the item. You can install predefined fulfillment flows from AppExchange, or you can create your own customizable flows.

SvcCatalogFulfillFlowItem Fields

You can specify which variables determine the possible values of these fields in the `SvcCatalogFulfillFlowItem` object.

Test a Fulfillment Flow

Test your created fulfillment flow in a sandbox to make sure that it functions as intended.

Retrieve Catalog Item Metadata

When you delete an item from the Service Catalog Builder, it’s put into a deactivated state. You can retrieve a deleted item’s metadata by retrieving the metadata for all items in your service catalog using either sfdx or Metadata API.

Published and Deprecated Catalog Items

You can save a catalog item as a draft. When an item is activated, it's published, making it visible to users.

Catalog Requests

Catalog requests are created when a user submits a request for a catalog item. Requests let users follow the status of a requested item and give you the ability to report on requests.

Sample Service Catalog Items Package

The Sample Service Catalog Items Package (optional) is an unlocked package that includes examples of service catalog items. Use this package as a reference to create items for your own catalog.

Install Employee Service Catalog

Employee Service Catalog comes included with the Employee Concierge managed package. For easiest access to Employee Service Catalog, use the Work.com installer to add Employee Concierge to your org.

EDITIONS

Available in: all editions

Install Employee Concierge.

After Employee Concierge is installed, you can view your imported or created flows as fulfillment flows and ensure that they're functioning as intended.

SEE ALSO:

Sample Service Catalog Items Package

Service Catalog Permissions

The Employee Productivity Plus add-on license or the IT Service Center and Endpoints add-on license is required in your org to grant access when configuring Employee Service Catalog. Assign new users the Service Catalog Builder or Service Catalog User permission set to get started. Administrators with Service Catalog Builder access can create, edit, and delete all catalog configuration, and can view and modify all generated requests. Users with Service Catalog User access can request items.

EDITIONS

Available in: all editions

Permission Set	Description
Service Catalog Builder	Grants you: • Access to Service Catalog Builder in Setup • API CRUD access to Service Catalog Item Definition, Service Catalog Category, Service Catalog Category Item, Service Catalog Fulfillment Flow, and Service Catalog Fulfillment Flow Item • Ability to create flows with processType `ServiceCatalogItemFlow` • Create, Read, Update, Delete, View All, and Modify All on Catalog Request and Catalog Request records • Ability to manage flows • Ability to view roles and role hierarchies
Service Catalog User	Grants you: • Read access to Service Catalog Category and Service Catalog Item • Create and Read access to Catalog Request and Catalog Request Related Item. Note: Sharing access to individual records is still gated by permission sets or sharing rules. • Ability to run flows

Create Your Service Catalog

Create your service catalog so that employees can browse for and order the items they need.

EDITIONS

Available in: all editions

1. From Setup, in the Quick Find box, enter `Service Catalog`, and under Process Automation, select **Service Catalog**.
2. To access the Service Catalog Builder landing page, click **Get Started**.
3. To build your service catalog, create categories and items.

Create a Catalog Category

A catalog category represents groups of catalog items in the service catalog. You can organize categories under a primary category. You can create up to 200 categories—100 primary categories and 100 secondary categories. Categories can be sorted by dragging and dropping them in the Service Catalog Builder landing page.

EDITIONS

Available in: all editions

1. In the Service Catalog Builder, click **New Category**.
2. Enter a name and description, and upload an optional image.
3. To place the category under another category, select the primary category. Otherwise, select **None**.

   A category can have only one primary category; you can't nest primary categories.
4. Click **Save**.

When a category is created, it's always visible in the Service Catalog Builder. A category is only visible in the Work.com Employee Concierge Community when it's active, and at least one item is visible to the user.

Edit a Catalog Category

Edit an existing catalog category.

EDITIONS

Available in: all editions

1. Go to the category list.
2. Click ▼ at the end of the category row.
3. Click **Edit**.

Delete a Catalog Category

You can only delete a catalog category if it has no assigned items. When all items are removed, a category can be deprecated and hidden from the UI, but still available for reporting.

EDITIONS

Available in: all editions

1. In the category list, at the end of the category's row, click ▼.
2. Select **Delete**.

Create a Catalog Item

Catalog items are pieces of metadata that represent items available in the service catalog. Items require an associated fulfillment flow and a primary catalog category. Primary and secondary categories can have up to 100 items. Your service catalog can have up to 1000 items. Items can be sorted by dragging and dropping them in the Service Catalog Builder landing page.

EDITIONS

Available in: all editions

1. On the Catalog page, click **New Catalog Item**.
2. Enter a name and description, and upload an image.
3. From the Category picklist, select a primary category for the item.

   To be able to share an item with multiple categories, select **Make accessible from other categories**.

4. Choose an existing fulfillment flow.

   Only active fulfillment flows that are screen flows are available.

   Note: If you edit an active, existing fulfillment flow in the Flow Builder, you can potentially break items that are currently referencing the flow.

5. Optionally, add questions for a user to answer. To require answers, select **Required**.

   You can add an unlimited number of questions only if the fulfillment flow supports it.

6. Select who sees the item in the catalog.

   By default, items are accessible to all users who have access to Service Catalog features. You can choose to restrict an item's visibility in the catalog to members of a public group. Making an item visible to a public group only controls its visibility in the catalog.

   Note: Item flows can be discoverable and accessible by users outside of the public group who have the Manage Flows permission.

7. Fill out all required fields, then save your work. The item is saved in draft state.
8. Activate the draft state item.

Edit a Catalog Item

EDITIONS

Available in: all editions

Edit an existing catalog item.

1. On the Service Catalog Builder landing page, locate the item.
2. Click ▼ next to the item.
3. Click **Edit**.

   To edit an item directly, click **Edit** on the item page.

Items that are edited after activation are in a pending state and must be reactivated again for the changes to be seen in the Service Catalog user UI.

Clone a Catalog Item

EDITIONS

Available in: all editions

To streamline catalog item creation for your service catalog, clone an existing item.

1. On the Service Catalog Builder landing page, locate the item that you want to clone.
2. Click ▼ next to the item.
3. Click **Clone**.

   To clone an item directly, click **Clone** on the item page.

4. Update all required fields, then save your work. The cloned item is saved in draft state.
5. Activate the draft state item.

Delete a Catalog Item

Deleting a catalog item clears up space in its associated catalog categories and hides it from users. However, the item is still available for reporting.

EDITIONS

Available in: all editions

1. On the Service Catalog Builder landing page, locate the item.
2. Click next to the item.
3. Click **Delete**.

Catalog Item Fulfillment Flows

Catalog item fulfillment flows are the automation that makes processing user-generated requests simple. An item's fulfillment flow is a screen flow that you assign to the item. You can install predefined fulfillment flows from AppExchange, or you can create your own customizable flows.

EDITIONS

Available in: all editions

If you want customizable flows to work in Service Catalog, you need these objects: `SvcCatalogFulfillmentFlow` and `SvcCatalogFulfillFlowItem`.

`SvcCatalogFulfillmentFlow` shows the flow's name and description. The description explains what the flow does when it runs. It also provides details on how the inputs chosen in the Service Catalog Builder are used if you select this flow for an item.

A `SvcCatalogFulfillFlowItem` is a child object of a `SvcCatalogFulfillmentFlow`. Each `SvcCatalogFulfillFlowItem` describes an input variable and what kind of data is valid to pass in the flow.

You can create additional questions if the selected fulfillment flow's `SvcCatalogFulfillflowItem` contains a `IsAdditionalQuestionsInputVariable` property set to `true`.

All constants and additional questions defined by the administrator are saved in a custom catalog item flow. An item flow calls the associated fulfillment flow as a subflow, adding one `IsAdditionalQuestionsInputVariable` question-answer string to the inputs of the associated fulfillment flow. There's one item flow per item.

SvcCatalogFulfillFlowItem Fields

You can specify which variables determine the possible values of these fields in the `SvcCatalogFulfillFlowItem` object.

EDITIONS

Available in: all editions

Field	Description
`displayType`	`text`, `number`, `checkbox`, `lookup`, or `picklist`
`fieldDefinition`	If `displayType == picklist`, shows the picklist field of the org with matching value. If `fieldLookupDomain == fieldDefinition` && `displayType == lookup`, shows the developer name of a lookup field that looks up to the object that you want to select.
`fieldLookupDomain`	Looks up or selects the object in the question UI
`lookupDomainFieldType`	Inputs the field type
`objectLookupDomain`	Filters which object has a lookup or picklist

SvcCatalogFulfillFlowItem Field Lookup Values

You can specify which variables determine the possible standard lookup values of these fields in the `SvcCatalogFulfillFlowItem` object.

SvcCatalogFulfillFlowItem Field Picklist Values

You can specify which variables determine the possible picklist values of these fields in the `SvcCatalogFulfillFlowItem` object.

Choose a SvcCatalogFulfillFlowItem Field from Any Object

You can choose a field from any object in the `SvcCatalogFulfillFlowItem` object.

Choose Any Object from a SvcCatalogFulfillFlowItem Field

You can choose any object in the `SvcCatalogFulfillFlowItem` object.

SvcCatalogFulfillFlowItem Field Lookup Values

You can specify which variables determine the possible standard lookup values of these fields in the `SvcCatalogFulfillFlowItem` object.

EDITIONS

Available in: all editions

Field	Description
`displayType`	`lookup`
`fieldDefinition`	Name of a field that looks up to `fieldLookupDomain`. This field's lookup filters are used when rendering the lookup input UI.
`fieldLookupDomain`	Object type to retrieve
`objectLookupDomain`	Object that has the `fieldDefinition` field

Example: If you choose a user to become the designated owner on new cases created by the fulfillment flow, and the user already has a lookup field named `Case_Owner__c` on `Account` looking up to `User`, these values are stored inside the `SvcCatalogFulfillFlowItem` record.

- `displayType`: `lookup`
- `fieldDefinition`: `Case_Owner__c`, the name of the lookup field
- `fieldLookupDomain`: `User`, the kind of record that gets looked up to
- `objectLookupDomain`: `Account`, an object that contains a field that looks up to the `User` record

SvcCatalogFulfillFlowItem Field Picklist Values

You can specify which variables determine the possible picklist values of these fields in the `SvcCatalogFulfillFlowItem` object.

EDITIONS

Available in: all editions

Field	Description
`displayType`	`picklist`
`fieldDefinition`	Field of type `picklist` on the `objectLookupDomain` object
`objectLookupDomain`	Object that defines the picklist

Example: If you choose a value from the `Case.Priority` standard picklist field to use for all cases filed by the fulfillment flow, these values are stored inside the `SvcCatalogFulfillFlowItem`.

- `displayType`: `picklist`
- `fieldDefinition`: `Priority`
- `objectLookupDomain`: `Case`

Choose a SvcCatalogFulfillFlowItem Field from Any Object

EDITIONS

Available in: all editions

You can choose a field from any object in the `SvcCatalogFulfillFlowItem` object.

Field	Description
`displayType`	`picklist`
`fieldLookupDomain`	`FieldDefinition`
`lookupDomainFieldType`	field type, such as `number` or `text`
`objectLookupDomain`	`EntityDefinition`

Example: If you choose a lookup field where the fulfillment flow can find more data, such as a flow that pinpoints which field contains the current user's manager, these values are stored inside the `SvcCatalogFulfillFlowItem`.

- `displayType`: `picklist`
- `fieldLookupDomain`: `FieldDefinition`, where you can choose a field
- `lookupDomainFieldType`: `Reference`, so you can pick a field of type `lookup`
- `objectLookupDomain`: `User`, which selects the user's record

Choose Any Object from a SvcCatalogFulfillFlowItem Field

EDITIONS

Available in: all editions

You can choose any object in the `SvcCatalogFulfillFlowItem` object.

Field	Description
`displayType`	`picklist`
`fieldLookupDomain`	`EntityDefinition`

Test a Fulfillment Flow

EDITIONS

Available in: all editions

Test your created fulfillment flow in a sandbox to make sure that it functions as intended.

For more information on sandbox generation, see Sandboxes: Staging Environments for Customizing and Testing.

SEE ALSO:

https://help.salesforce.com/s/articleView?id=sf.flow_test.htm

Retrieve Catalog Item Metadata

EDITIONS

Available in: all editions

When you delete an item from the Service Catalog Builder, it's put into a deactivated state. You can retrieve a deleted item's metadata by retrieving the metadata for all items in your service catalog using either sfdx or Metadata API.

To retrieve all items in your org, use this sample manifest file.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>SvcCatalogItemDef</name>
    </types>
    <version>53.0</version>
</Package>
```

1. To use sfdx, run the command `sfdx force:source:retrieve -x <manifestFile>`.
2. To use Metadata API, include the manifest file in your metadata zip file.

SEE ALSO:

https://developer.salesforce.com/docs/atlas.en-us.234.0.api_meta.meta/api_meta/meta_intro.htm

Published and Deprecated Catalog Items

EDITIONS

Available in: all editions

You can save a catalog item as a draft. When an item is activated, it's published, making it visible to users.

You can remove an item from the Service Catalog user UI by changing its status from published to deprecated.

Catalog Requests

EDITIONS

Available in: all editions

Catalog requests are created when a user submits a request for a catalog item. Requests let users follow the status of a requested item and give you the ability to report on requests.

A request is linked to other Salesforce records through `CatalogReqRelatedItem` records. `CatalogRequest` and `CatalogReqRelatedItem` are data objects.

Requests are linked to other Salesforce records and are created in an open state under these conditions.

- The fulfillment flow provides an output variable named `SvcCatalogRelatedRecordIDs`.
- The output variable has type `text collection`.
- The output variable's values are valid Salesforce record IDs of supported objects.

Supported objects are standard or custom objects that can be the target of a custom lookup relationship.

Additional User Questions with an Attachment type become related to the request and its related items via a `ContentDocumentLink` record.

Sample Service Catalog Items Package

The Sample Service Catalog Items Package (optional) is an unlocked package that includes examples of service catalog items. Use this package as a reference to create items for your own catalog.

EDITIONS

Available in: all editions

> **Note:** The Sample Service Catalog Items Package is available only in English.

[Org Prerequisites to Install the Sample Service Catalog Items Package]

Installing the Sample Service Catalog Items Package in your org requires access to the Employee standard object and the Service Catalog metadata objects.

[Install the Sample Service Catalog Items Package]

To see examples of catalog items that you can create in your service catalog, install the Sample Service Catalog Items Package.

[Grant Users Access to the Sample Service Catalog Items Package]

To make requests for items from the Sample Service Catalog Items Package, you need access to the Employee standard object and the Service Catalog metadata objects.

[Configure the Sample Service Catalog Items Package for the User UI]

Catalog items and flows in the Sample Service Catalog Items Package are installed in draft state. If an Employee Experience community with Service Catalog is set up and configured in the org, activate the items and flows so users can see them in your catalog.

Org Prerequisites to Install the Sample Service Catalog Items Package

Installing the Sample Service Catalog Items Package in your org requires access to the Employee standard object and the Service Catalog metadata objects.

EDITIONS

Available in: all editions

If you set up your org with the Employee Workspace and Employee Concierge packages, access to the Employee object is included. Similarly, if you set up your org according to Service Catalog Permissions, access to the Service Catalog metadata objects is included.

> **Note:** You can get org access without installing packages (optional).
>
> - For production orgs, use an Employee Experience add-on license.
> - For scratch orgs, include the `EmployeeExperience` scratch org feature in the scratch org definition file.

> **Note:** You can also get org access to the Service Catalog metadata objects directly (optional).
>
> - For production orgs, use an Employee Productivity Plus add-on license or IT Service Center and Endpoints add-on license.
> - For scratch orgs, include the `ServiceCatalog` scratch org feature in the scratch org definition file.

SEE ALSO:

Service Catalog Permissions

Install the Sample Service Catalog Items Package

To see examples of catalog items that you can create in your service catalog, install the Sample Service Catalog Items Package.

EDITIONS

Available in: all editions

To install this unlocked package in your org:

1. Go to the Install Sample Service Catalog Items page.

2. Click **Install for All Users**.
3. Click **Install**.

Grant Users Access to the Sample Service Catalog Items Package

EDITIONS

Available in: all editions

To make requests for items from the Sample Service Catalog Items Package, you need access to the Employee standard object and the Service Catalog metadata objects.

If you set up your org with the Employee Workspace and Employee Concierge packages, access to the Employee object is included.

Note: To grant users access to the Employee object without installing packages, assign the `EmployeeExperiencePsl` permission set license, and a permission set that grants Read access to the Employee object.

If you set up the org according to Service Catalog Permissions, user access to the Service Catalog metadata objects is included.

Note: To give users the ability to create and edit items in the catalog, assign the standard Service Catalog Builder permission set. To give users only the ability to make requests, assign the standard Service Catalog User permission set.

SEE ALSO:

Service Catalog Permissions

Configure the Sample Service Catalog Items Package for the User UI

EDITIONS

Available in: all editions

Catalog items and flows in the Sample Service Catalog Items Package are installed in draft state. If an Employee Experience community with Service Catalog is set up and configured in the org, activate the items and flows so users can see them in your catalog.

Users need Read access to the cases created by the fulfillment flows. You can give users access with one of these options.

- Installing and configuring the Employee Concierge package with the Work.com installer.

  Note: Employee records in the org require that the value of `UserId` is set to the id of the user accessing the item. Users also require access to the `Employee.UserId` field.

- Creating a permission set that grants Read access to the Case object and assigning it to users.
- Granting users Modify All Data permission.

Users require access to the installed `Workplace Services` record type on the Case object. The easiest way to grant access is by adding the record type to an existing permission set. To learn more, see Assign Custom Record Types in Permission Sets.

To close requests when cases are closed:

1. From Setup, click **Flows**.
2. Activate the `[Sample] Close Request if All Related Items are Closed` and `[Sample] Update Request Related Item if Case is Updated` flows.

SEE ALSO:

Create a Catalog Item

Employee Field and Case Feed Visibility for Work.com

Custom solutions are available for you to hide sensitive information contained in the Employee field and the case feeds of the Work.com ticketing systems.

To provide proper visibility of sensitive information for all individuals in your organization, we have several custom solutions for you. These custom solutions include the ability to create:

- Visibility rules for the Employee field.
- Default sharing rules that the Work.com ticketing systems enable for the Case object.

Review the solutions available to you, and then determine whether to implement them based on your organization's needs.

Employee Field Visiblity

You can control employee field visibility for your ornganization with the creation of visiblity rules. These rules are based on the user's relationship to the employee record and the field's data classification category.

Employee Case Feed Visibility Considerations

The Work.com ticketing systems contain a default sharing rule for the Case object that provides Employee, Service Agent, and Standard Platform users visibility to sensitive information in the Employee Workspace and Service Console case feeds. You can configure level of access these users have per your organizations needs.

Employee Field Visiblity

You can control employee field visibility for your ornganization with the creation of visiblity rules. These rules are based on the user's relationship to the employee record and the field's data classification category.

Set Employee Field Visibility Rules

Set employee field visibility rules to control visibility for the employee field.

Use Default Employee Field Visibility Settings

The default employee field visibility settings are based on what we determine to be typical Work.com usage.

Edit the Default Employee Field Visibility Settings

Edit the data classfiction category for the default fields of the Employee object in the Object Manager.

Create Custom Employee Field Visibility Rules

Create custom employee field visibility rules based on your organization's specific needs.

Configure Employee Field Visibility with the API

Use the FieldRestrictionRule Tooling API object or Metadata API type to create or modify employee field visibility rules.

Employee Field Visibility Considerations and Limitations

Review these considerations and limitations for employee field visibility.

Set Employee Field Visibility Rules

Set employee field visibility rules to control visibility for the employee field.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee field visibility rules require a Workplace Command Center add-on license or an Employee Experience add-on license.

USER PERMISSIONS

To create field visibility rules
- Manage Sharing

Employee field visibility rules allow access to a field's existing accessibility settings. If the Employee object isn't visible to a user, employee field visibility can't control access to its fields. To ensure field visibility rules work as expected, make sure that any employee sharing or field-level security settings are, at a minimum, set to read-only.

Before you set employee field visibility rules, keep these considerations mind:

- We automatically prevent you from setting conflicting rules.

  If a category is visible to the Other Employees persona, then it's automatically visible to the Direct Manager persona, and the Direct Manager toggle is locked. If a category is hidden from the Direct Manager persona, it's also hidden and the toggle is locked for Other Employees.

- Hiding a category overrides any existing access settings.

  If a category is marked hidden, any other settings that make a field in that category visible are ignored, like org-wide defaults, field-level security, or record sharing. In addition, making a category visible honors any existing settings that control access to the field. So, fields with existing settings can still be hidden, even if they're marked visible.

- Privacy restrictions can apply to your organization.

  This solution allows you to apply field-level permissions to personal information about individuals, which is subject to various legal requirements in different jurisdictions. As with all Salesforce products, consult with your own counsel to confirm that your intended use of this solution meets your legal needs. More information about Salesforce's privacy program can be found here.

To set field visibility rules:

1. From Setup, in the Quick Find box, enter `Employee`, and then select **Employee Field Access**.
2. Turn on **Employee field visibility rules**.
   The options for Employee Field Access display.
3. Select **Default Categories** or **Create Custom Categories**.

   Visibility rules are set per category, and each category contains one or more fields. To see which employee fields are included in a category, click the category name in the table.

   Default categories
   Uses Salesforce-created data categories and visibility rules.

   Custom Categories
   Uses all data classification categories that contain employee fields in your org, and lets you decide the visibility rule for each category.

4. Set the visibility for each category and persona.

   Employee Self persona
   Lets the logged-in user view their own employee record.

   Direct Manager persona
   Lets the logged-in user view their direct reports' employee records. The persona includes only direct reports one level below the manager.

   Other Employees persona
   Lets the logged-in user view any other person's employee record.

5. Review and save your changes.

The visibility rules that you set result in the application of default employee field visibility settings.

Review the default settings in Use Default Employee Field Visibility Settings on page 238.

SEE ALSO:

Set Your Internal Organization-Wide Sharing Defaults

Field-Level Security

Use Default Employee Field Visibility Settings

The default employee field visibility settings are based on what we determine to be typical Work.com usage.

The default visibility settings consist of three separate data categories that have their own permissions and fields for the Employee object. Review the table for the default visibility settings for the three categories: Profile, Restricted, and Private. You can edit the default visibility settings or create custom settings with the instructions provided in:

- Edit the Default Employee Field Visibility Settings on page 239
- Create Custom Employee Field Visibility Rules on page 239

DATA CATEGORY	VISIBILITY PERMISSIONS	DEFAULT FIELDS FOR THE EMPLOYEE OBJECT ASSIGNED TO THE DATA CATEGORY
Public Profile	Visible to all personas	• Email • Job • Profile • LocationId • Manager • OutOfOfficeMessage • PreferredPronoun • TimeZone • WorkingHoursEnd • WorkingHoursStart • WorkPhone
Restricted	• Employee Self persona • Direct Manager Persona	• Availability • CurrentWellnessStatus • EmployeeNumber EmploymentType • InternalOrganizationUnitId

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee field visibility rules require a Workplace Command Center add-on license or an Employee Experience add-on license.

USER PERMISSIONS

To create field visibility rules

- Manage Sharing

Edit the Default Employee Field Visibility Settings

Edit the data classfiction category for the default fields of the Employee object in the Object Manager.

We recommend assigning only one category per field. If a field belongs to multiple data classification categories, multiple rules are created using OR logic. As a result, the most permissible rule takes effect, which can lead to unwanted behavior. To avoid this scenario, use one category per field.

1. From Setup, select **Object Manager**, and then select the **Employee** object.
2. From the sidebar, select **Fields & Relationships**.
3. Select a field where you want to set up data classification, and then click **Edit**.
4. Save your updates.

SEE ALSO:

Set Up Data Classification Metadata

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee field visibility rules require a Workplace Command Center add-on license or an Employee Experience add-on license.

USER PERMISSIONS

To create field visibility rules

- Manage Sharing

Create Custom Employee Field Visibility Rules

Create custom employee field visibility rules based on your organization's specific needs.

Your custom rules for employee field visibility populate the table with all data classification categories defined in your org, which also contain employee fields.

To create and assign data classification categories:

1. From Setup, in the Quick Find box, enter `Data Classification Settings`, and then select **Data Classification Settings**.
2. Select **Use default data sensitivity level**.
   This setting applies a default value for the Data Sensitivity field for all contacts, leads, person accounts, and users.
3. Edit the data classification values.
   a. From Setup, select **Object Manager**, and then select the **Employee** object.
   b. Select **Fields & Relationships**.
   c. Select a field for the employee object that you want to set up data classification.
   d. Click **Edit**.
   e. From the data classification dropdown, select a value for each metadata field.
   f. Save your updates.
4. Edit the Compliance Categorization picklist values.
   a. Select **Edit Compliance Categorization Picklist Values**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee field visibility rules require a Workplace Command Center add-on license or an Employee Experience add-on license.

USER PERMISSIONS

To create field visibility rules

- Manage Sharing

b. From the Edit window, add, delete, rename, or reorder an existing picklist value.

SEE ALSO:

Set Up Data Classification Metadata

Configure Employee Field Visibility with the API

Use the FieldRestrictionRule Tooling API object or Metadata API type to create or modify employee field visibility rules.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Employee field visibility rules require a Workplace Command Center add-on license or an Employee Experience add-on license.

USER PERMISSIONS

To create field visibility rules

- Manage Sharing

Note: In the Summer '21 release, only the Employee object supports field visibility rules.

The Work.com API allows you to create field visibility rules that are customized for your privacy needs. For example, you can create a rule that controls field visibility for a specific group of users, such as users with a designated role or profile. In addition, you can customize the criteria that determines which fields are visible.

You can use the Salesforce Tooling or Metadata API to create, retrieve, update, and delete employee field visibility rules. If you create field visibility rules on the Employee Field Access Setup page that conflict with rules you created using the API, you can choose whether to override the API rules.

SEE ALSO:

Tooling Developer Guide: FieldRestrictionRule

Metadata Developer Guide: FieldRestrictionRule

Employee Field Visibility Considerations and Limitations

Review these considerations and limitations for employee field visibility.

- Employee field visibility rules allow access to a field's existing accessibility setting. If the Employee object isn't viewable to a user, employee field visibility can't control access to its fields. To ensure field visibility rules work as expected, make sure that any employee sharing or field-level security settings are, at a minimum, set to read-only.
- Employee Workspace doesn't support employee field visibility rules because enabling them can lead to unwanted behavior.
- Users can search on indexed fields, even if they're hidden. The field values are still hidden, but the relevant records appear in the search results.
- We recommend assigning only one category per field. If a field belongs to multiple data classification categories, multiple rules are created using OR logic. As a result, the most permissible rule takes effect, which can lead to unwanted behavior. To avoid this scenario, use one category per field.
- Users with View All Data permissions, such as admins, aren't affected by employee field visibility rules. So it's possible that they can view sensitive employee data.
- Employee field visibility rules still show as active in the API, but they aren't applied.
- You can't assign data classification categories to compound fields, like Address.
- Hiding the `UserId` field prevents certain features from working.
- In reports, lookup fields and values are still visible even if those fields are hidden.
- Running Apex code in system mode bypasses any employee field visibility rules.
- If you change a compliance category API name, any rules in that category no longer work. Re-enable rules in the employee field visibility setup page.

Employee Case Feed Visibility Considerations

The Work.com ticketing systems contain a default sharing rule for the Case object that provides Employee, Service Agent, and Standard Platform users visibility to sensitive information in the Employee Workspace and Service Console case feeds. You can configure level of access these users have per your organizations needs.

The sections that follow describe and propose solutions to two different case feed visibility scenarios for the Work.com ticketing systems (HR Service Center and Employee Concierge).

My Support Tickets Page and Service Console Case Feed Access Considerations

In Employee Concierge, employees are Standard Platform users who can see any comments and ticket attachments sent between IT agents or HR agents in their case feed on the My Support Ticket page. Several solutions are available for you to restrict their visibility to sensitive comments and information on the My Support Tickets page and the Service Console apps that they have access to. You can choose whether to implement none, one, or multiple of these solutions based on your ogranization's needs.

Service Console Case Feed Accessibility for Employee Users Who Are Service Agents

By default, Employee users who are also Service Agent users in your organization can view sensitive case information about themselves in the Service Console. Several solutions are available for you to prevent the sharing of sensitive information. You can choose to implement the solution(s) that suit your organization the best.

My Support Tickets Page and Service Console Case Feed Access Considerations

In Employee Concierge, employees are Standard Platform users who can see any comments and ticket attachments sent between IT agents or HR agents in their case feed on the My Support Ticket page. Several solutions are available for you to restrict their visibility to sensitive comments and information on the My Support Tickets page and the Service Console apps that they have access to. You can choose whether to implement none, one, or multiple of these solutions based on your ogranization's needs.

1. Restrict the Case Feed Access for the Standard Platform User in the CRM App

   If Standard Platform users have access to the CRM app, several configurations are available to disable their visibility of internal or sensitive comments in the case feed.

2. Configure Feed Tracking for a Standard Platform User

   Review the Case fields that you enabled for Feed Tracking to ensure the proper Field Level Security for the fields that you don't want visible to Standard Platform users.

SEE ALSO:

Optimize Ticket Attachments with the Attachments Component

Agent Desk Considerations

Manage and Resolve Tickets with Agent Desk

Share Resources with Employee Concierge Users

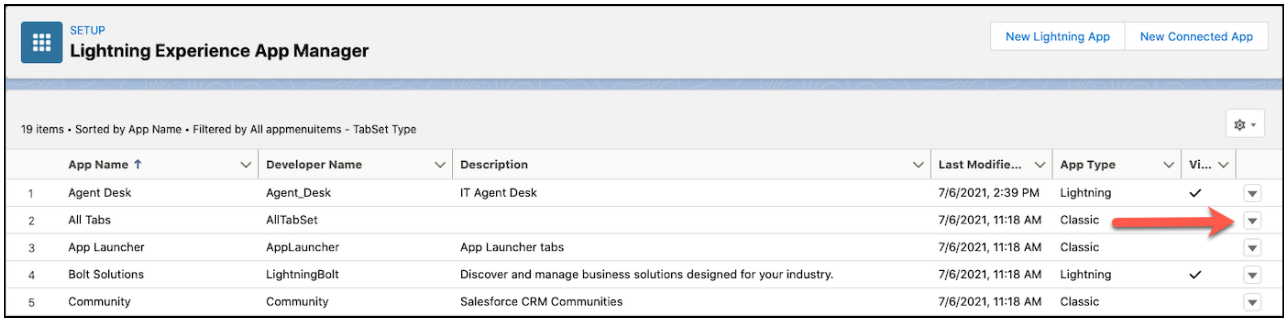
Service Console Case Feed Accessibility for Employee Users Who Are Service Agents

Restrict the Case Feed Access for the Standard Platform User in the CRM App

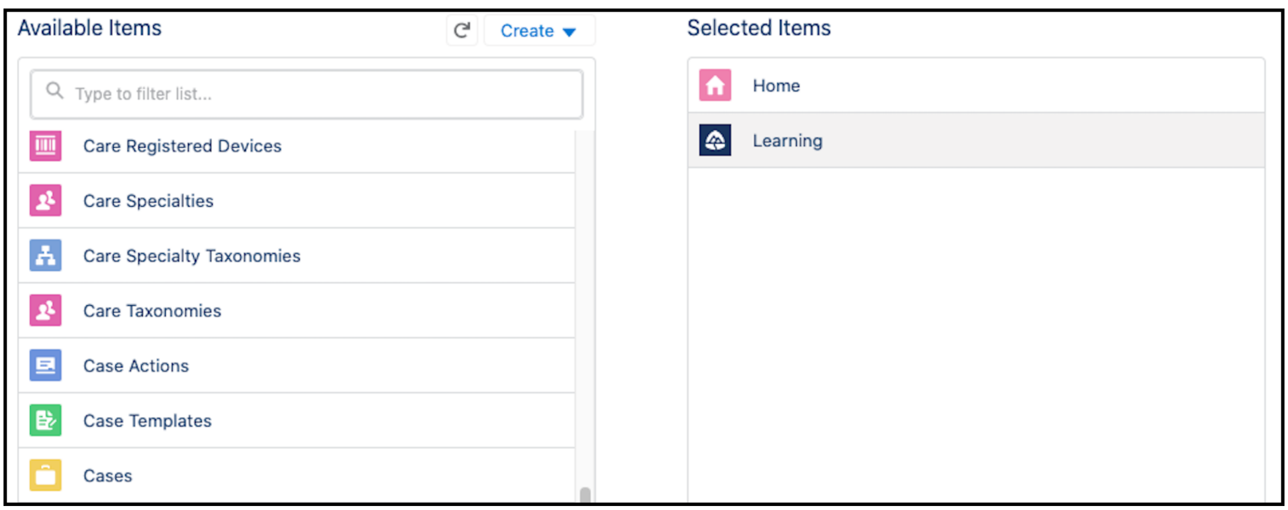
If Standard Platform users have access to the CRM app, several configurations are available to disable their visibility of internal or sensitive comments in the case feed.

These instructions assume that an Employee user is a Standard Platform user. If your organization created or cloned another custom profile and then assigned Employee users using this custom profile, the Employee user is associated with your custom profile configuration.

1. For apps the employee can access in the CRM, remove the Case object as a selected item:
   a. From Setup, in the Quick Find box, enter `App Manager`, and then select **App Manager**.
      You see the **App Manager** page.
   b. Select a CRM app that is accessible to employees.
   c. Click the dropdown icon for your selected CRM app, and then click **Edit**.



   d. Click **App Settings**.
   e. Click **Navigation Items**.
   f. Move **Cases** from the Selected Items list to the Available Items list.
      The image shows the proper location for Cases.



   g. Save your updates.

2. Remove the Feed-Based Layout from the Page Layout assigned to a Standard Platform user:
   a. From Setup, select **Object Manager**.
   b. Click **Case**.
   c. Click **Case Page Layouts**.
   d. Click **Page Layout Assignment**.
   e. Find the Page Layout assigned to the applicable record types and Standard Platform user.
   f. Confirm if the Case Page Layout shows a **Feed View** menu option.

g. If confirmed, click **New** to create a Case Page Layout.
   You see the **New Case Page Layout** window.
h. Ensure that the **Feed-Based Layout** option isn't selected.
i. Save your new Case Page Layout, and then assign it to the Standard Platform user.

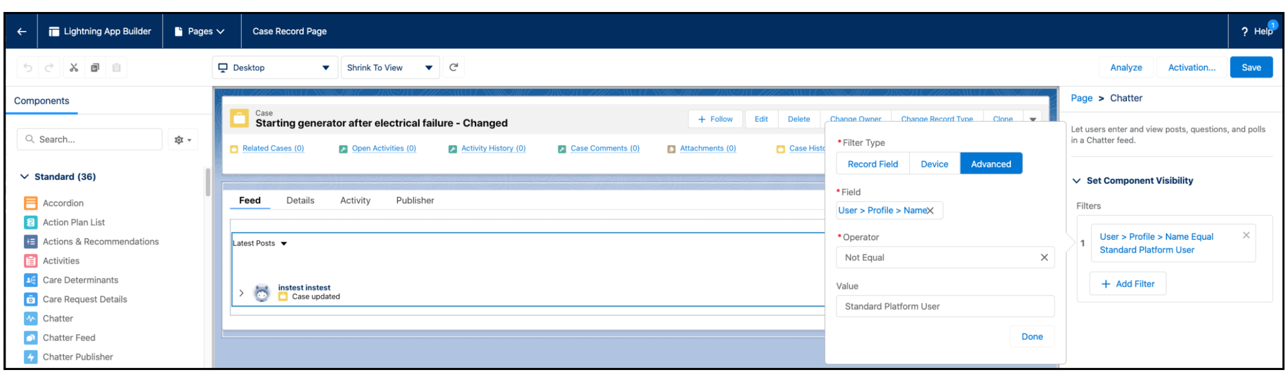
3. Remove the Feed Component visibility from the Case Record page.

Tip: Two options are available to help you complete this step. Choose the option that works best for your current CRM app setup.

Option #1 – Disable the Feed Component Visibility for the Standard Platform User.

a. From Setup, in the Quick Find box, enter `Lightning App Builder`, and then select **Lightning App Builder**.
b. Under Lightning Pages, locate the Case Record Page.

c. Click **Edit**.
   You see the **Case Record Page**.
d. Click the **Feed** tab.
e. Click **+ Add Filter**.
f. Set Filter Type to **Advanced**.
g. Set Field to **User > Profile > Name**.
h. Set Operator to **Not Equal**.
i. Set Value to **Standard Platform User**.



j. Click **Done**, and then save your updates.

Option #2 – Create a separate Case Records Page for Standard Platform Users.

a. From Setup, in the Quick Find box, enter `Lightning App Builder`, and then select **Lightning App Builder**.

b. Under Lightning Pages, locate the Case Record page.

c. Click **Clone**.
You see the **Edit** page.

d. For Label, enter `Employee Case Record Page`.

e. Save your update, and then click **Activate**.
You see the **Activation: Employee Case Record Page** window.

f. Click the **App, Record Type, and Profile** tab.

g. Click **Assign to Apps, Record Types, and Profiles**.

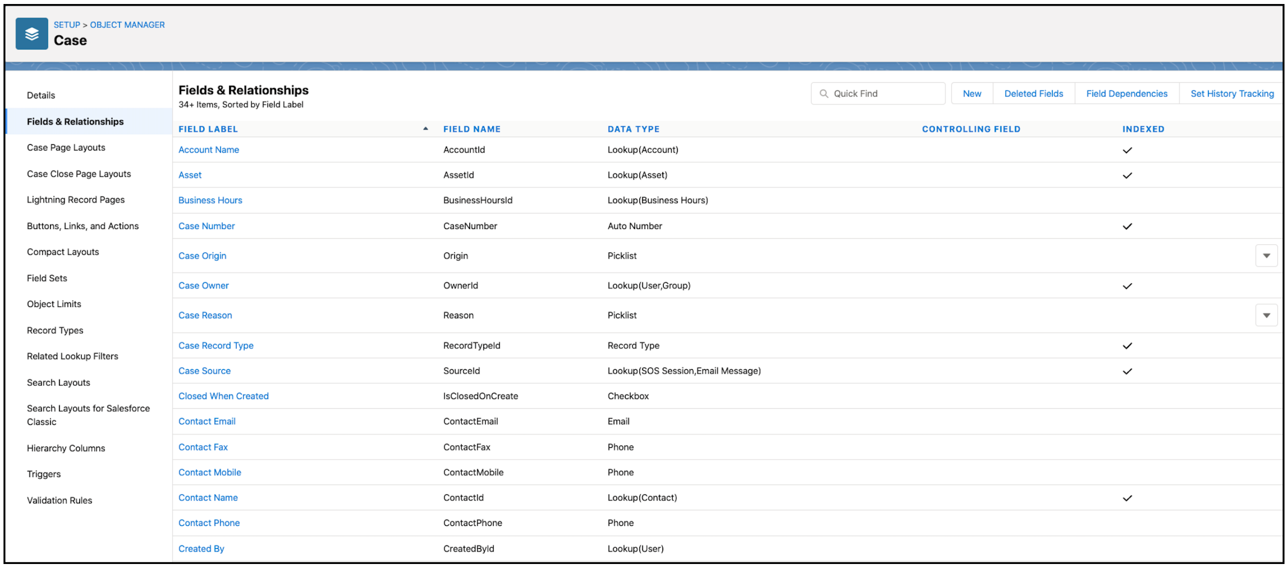
h. Assign the new page to one or more apps, record types, and profile, the Stand Platform user.

i. Review and save your updates.

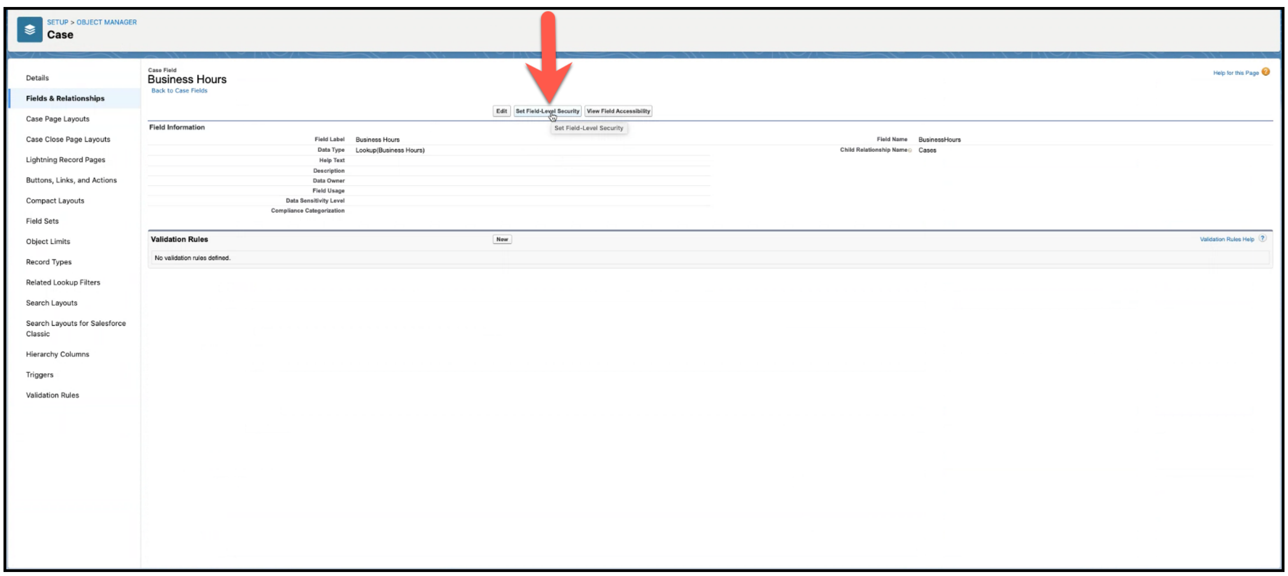
Configure Feed Tracking for a Standard Platform User

Review the Case fields that you enabled for Feed Tracking to ensure the proper Field Level Security for the fields that you don't want visible to Standard Platform users.

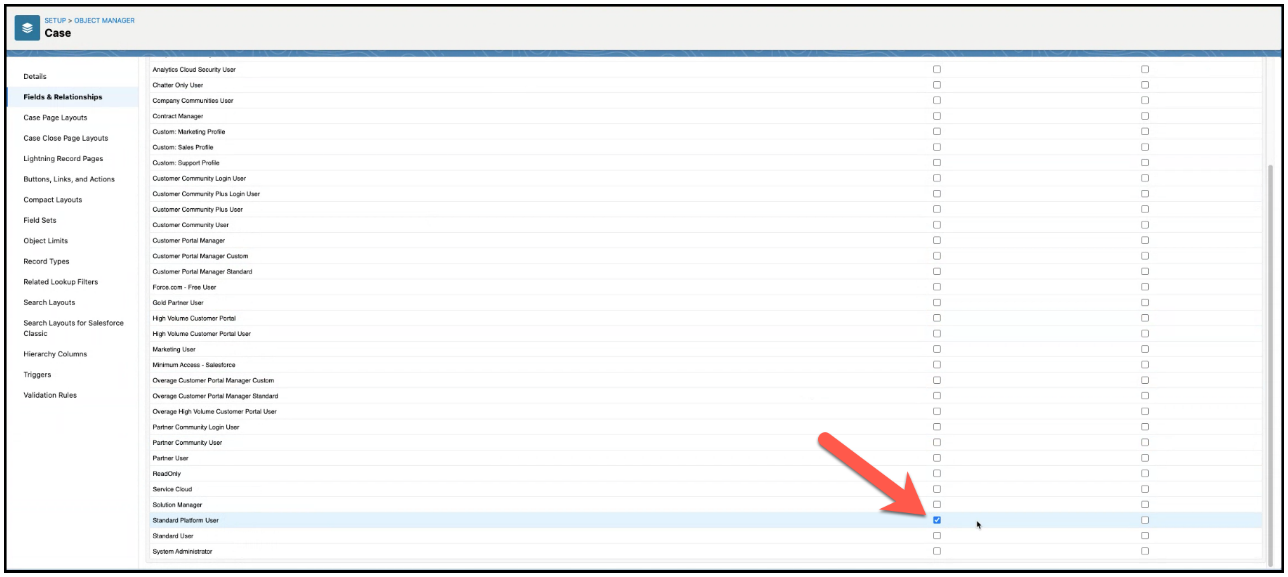
1. From Setup, select **Object Manager**.
2. Click **Case**.
3. Click **Fields and Relationships**.
4. Select a field that you don't want visible for a Standard Platform user.



5. For your selected field, click **Set Field Level Security**.



6. Deselect **Visibility** for the Standard Platform user.



7. Save your updates.

SEE ALSO:

Feed Tracking

Customize Chatter Feed Tracking

Service Console Case Feed Accessibility for Employee Users Who Are Service Agents

By default, Employee users who are also Service Agent users in your organization can view sensitive case information about themselves in the Service Console. Several solutions are available for you to prevent the sharing of sensitive information. You can choose to implement the solution(s) that suit your organization the best.

Overview

The Work.com ticketing systems contain a sharing rule that provides the creator of a case, the employee, access to the case in the Employee Workspace. In addition, as long as the creator of a case has the Employee Service Agent permission set license or is a Service Cloud user, they can access the case in the Service Console.

Consider this scenario for Ansha, who is an employee at Cirrus. Her job is an Employee Service Agent where she:

1. Logs into the Employee Workspace and creates a case requesting leave.
2. Logs into the Service Console.
3. Finds her case.
4. Reads the case feed, and sees other employee Service Agents discussing her case.

Ideally, Ansha wouldn't be able to see these internal comments because this type of access raises privacy issues for employees who are service agents. Because Service Agent users in your organization are also Employee users, they use the same user login to access the Service Console to support cases assigned to them under Service Agent user. As a result, the Service Agent can view sensitive information in the Service Console case feed for the cases that they log as Employee users in Employee Workspace.

Available Solutions

Several solutions are available to prevent a Service Agent's access to sensitive case information about themselves in the Service Console.

There are two sets of solutions available for implementation, and each set contains two solutions. You can choose to implement one, none, or multiple of the solutions that suit your organization's needs. Each solution is available for implementation regardless of whether you're a new or existing installer of Work.com. However, we indicate the optimal solutions for new and existing installers.

The first solution set enables you to configure your Case Record page to hide components that contain sensitive information from the Employee user whose role is a Service Agent. This solution set doesn't require two separate permission set licenses for the Employee who is a Service Agent.

The second solution enables you to configure the employees whose roles are Service Agents into two separate users. This solution requires you to assign separate permission set licenses for the employee who is a Service Agent.

- **Solution Set One**
  - **Configure your Case Record page to restrict visibility of sensitive information**

    Configure your Case Record page to prevent a Service Agent user's access to the case feed component or any component that contains sensitive information about them.

    This solution is optimal for all installers of Work.com.
  - **Remove Salesforce Chatter accessibility for Employee users**

    Set the Chatter object settings in the Salesforce CMS to hide the Chatter tab from the Employee user who is logged into the Service Console as a Service Agent.

    This solution is optimal for all installers of Work.com.
- **Solution Set Two**
  - **Create a Separate Service Agent user for each Employee user**

    Create a separate employee user for each service agent in your organization, and then configure the proper permission sets for each user. Creating an employee user from the service agent user prevents the service agent's access to cases about themselves in the Service Console.

    This solution is optimal for installers who set up Work.com for the first time.
  - **Modify your existing agent users and create additional employee users**

    Remove permission sets from the existing Service Agent users in your organization. Then, create new Employee users, and configure the proper permission sets for these Employee users. Creating an Employee user from the Service Agent user prevents the service agent's access to cases about themselves in the Service Console.

    This solution is optimal for installers who already set up Work.com.

The documentation for Solution Set 1 begins in the next Help Article. Then, the documentation proceeds to Solution Set 2, which begins with Configure Employees Who Are Service Agents as Two Separate Users on page 253.

Configure Your Case Record Page to Hide Components That Contain Sensitive Comments and Information

All Work.com installers can configure the Case Record page to hide case feed components from Employee users who are also Service Agents users. Such components include, but aren't limited to, the Salesforce Chatter and Feed components.

Configure Employees Who Are Service Agents as Two Separate Users

Whether you're a new or existing Work.com installer, you can configure the employees who are Service Agents in your organization as two separate users. This configuration gives the Employee user who is also a Service Agent user access to the Service Console so they can manage tickets and cases without seeing the tickets and cases they submitted as an Employee user in Employee Workspace.

Configure Your Case Record Page to Hide Components That Contain Sensitive Comments and Information

All Work.com installers can configure the Case Record page to hide case feed components from Employee users who are also Service Agents users. Such components include, but aren't limited to, the Salesforce Chatter and Feed components.

Two solutions are available for you to hide the feed components on your Case Record page. Review each solution, and determine whether to implement them based on your organization's needs.

Remove Salesforce Chatter Accessibility for Service Agent Users

Set the Chatter object settings in the Salesforce CMS to hide the Chatter tab from all Service Agent users.

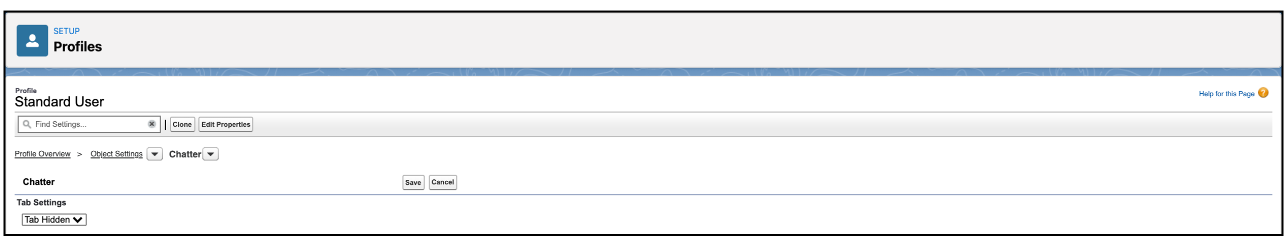
Create Conditional Visibility Rules for the Case Feed Component

Create conditional visibility rules in the Service Console and Lightning App Builder for the case feed component of the Case Record page. The rules prevent service agents from seeing sensitive information in the Service Console when a case is about themselves.

Remove Salesforce Chatter Accessibility for Service Agent Users

Set the Chatter object settings in the Salesforce CMS to hide the Chatter tab from all Service Agent users.

1. From Setup, in the Quick Find box, enter *`Profiles`*, and then select **Profiles**.
2. Select the profile for an Agent User: IT Agent or HR Agent.
3. From the **Agent User** profile page, under Assigned Apps, select **Object Settings**.
4. From the **All Object Settings** page, select **Chatter**.
5. From the **Chatter** page, click **Edit**.
6. From the Tab Settings dropdown, select **Tab Hidden**.
7. Save your updates.



Create Conditional Visibility Rules for the Case Feed Component

Create conditional visibility rules in the Service Console and Lightning App Builder for the case feed component of the Case Record page. The rules prevent service agents from seeing sensitive information in the Service Console when a case is about themselves.

The solution requires the creation of a formula field for the Case object: `CaseIsAboutLoginUser`. The formula field indicates that the service agent user who views a case in the Service Console is the same employee that the case is about.

The formula field assumes these default data model mappings for the Login User, Employee User, and Person Account.

1. The individual's Employee user and Service Agent user have the same Employee Number (`Employee.EmployeeNumber`) for both personas due to the Create and Link Employees and Users process. This process results in a `User.EmployeeNumber=Employee.EmployeeNumber` configuration.

2. The Create Person Accounts for Employee Records process results in a Person Account with the same account number (`Account.AccountNumber`) as the Employee Number (`Employee.EmployeeNumber`). It creates an `Employee.EmployeeNumber=Account.AccountNumber` configuration.
3. These processes result in a configuration where the Person Account Number and the Employee Number are the same:

   `User.EmployeeNumber=Account.AccountNumber`

To address the `User.EmployeeNumber=Account.AccountNumber` configuration, create a field label (`CaseIsAboutLoginUser`) and data model formula field (`$User.EmployeeNumber = Account.AccountNumber`) for the Case object. The field label and formula check if the current Login User's `User.EmployeeNumber` is the same as the `Account.AccountNumber` for the case in the Service Console. When the numbers match, the case feed component isn't visible to the user.

To create conditional visibility rules:

1. Create the `CaseIsAboutLoginUser` field for the Case object.
   a. From Setup, in the Quick Find box, enter *`Object Manger`*, and then select **Object Manager**.
   b. From the Object Manger, select **Case** > **Field & Relationships** > **New**.
      You see the **New Custom Field** page open. The multistep New Custom Field workflow initiates for you to create the `CaseIsAboutLoginUser` field.
   c. From step 1 of the workflow, select **Formula** as the Data Type, and then click **Next**.

   d. From step 2 of the workflow, set these configurations.
      a. Enter *`CaseIsAboutLoginUser`* for the Field Label and Field Name.
      b. Select **Checkbox** as the Formula Return Type.
      c. Click **Next**.

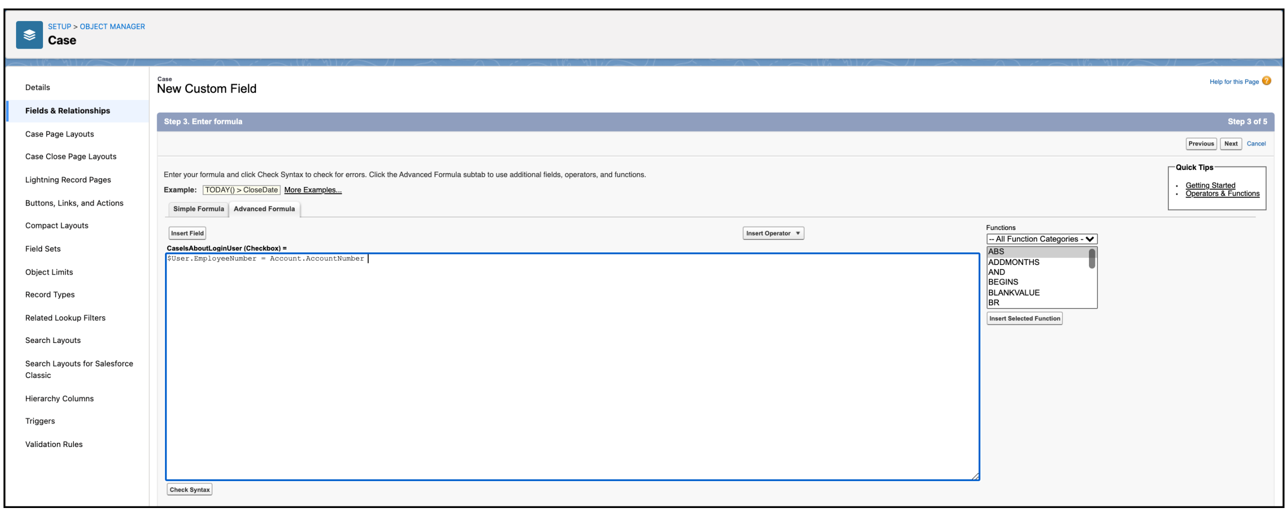
e. From step 3 of the workflow, set these configurations.

a. Select **Advanced Formula**.

b. In the text field, enter `$User.EmployeeNumber=Account.AccountNumber`.

c. To confirm that there are no formula errors, click **Check Syntax**.

d. Click **Next**.



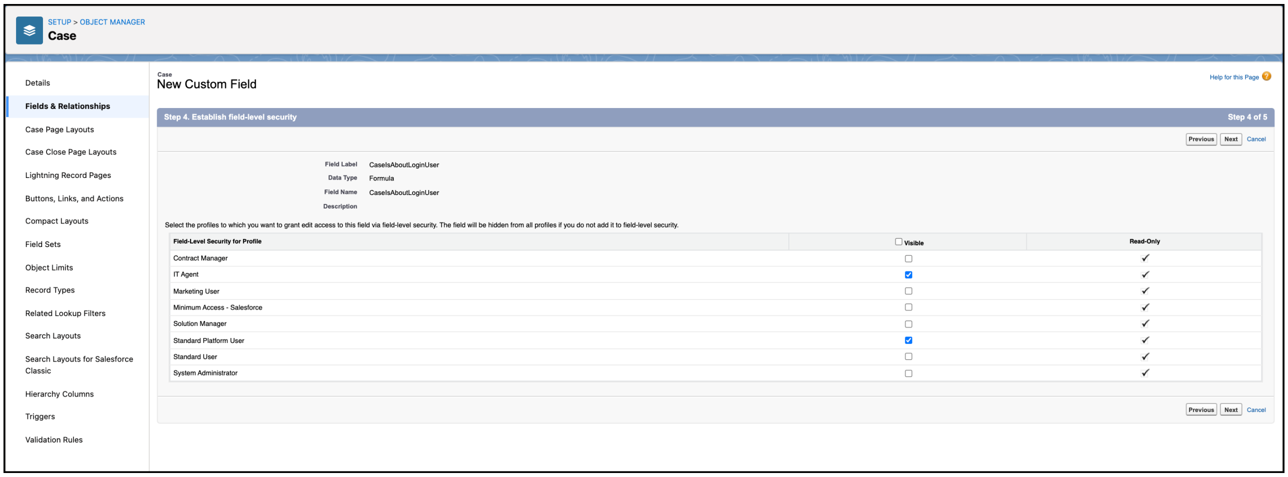
f. From step 4 of the workflow, set these configurations.

a. Unselect **Visible**.

b. Select **Standard Platform User**.

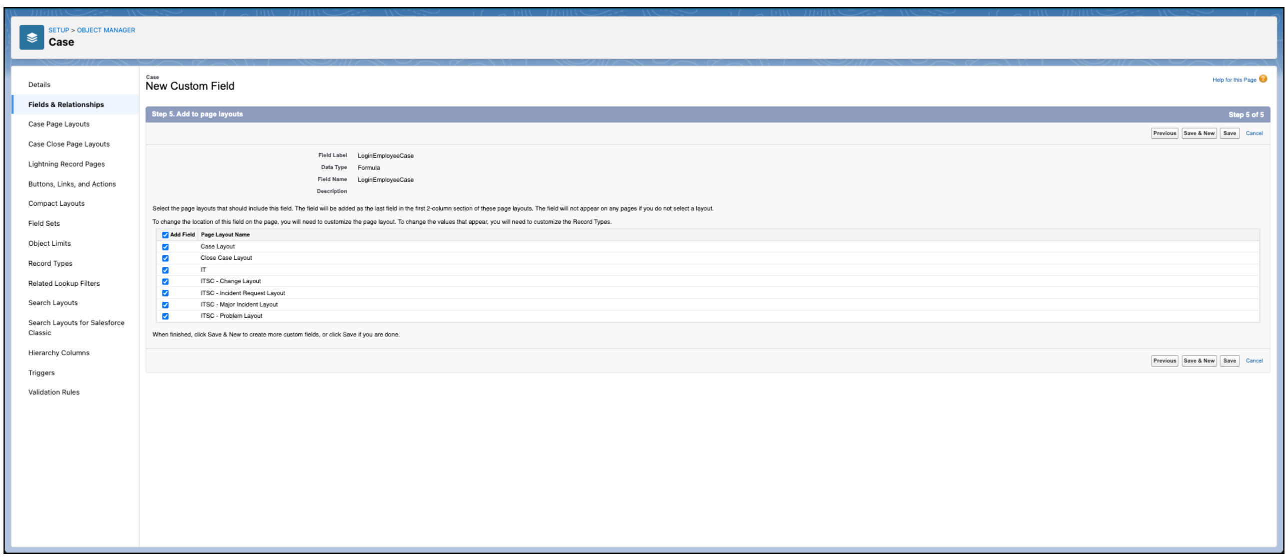
c. Select either or both **IT Agent** and **HR Service Agent**.

d. Click **Next**.



g. Optional: From step 5 of the workflow, choose the page layouts to include the `CaseIsAboutLoginUser` field, and then click **New**.

The `CaseIsAboutLoginUser` field doesn't require exposure on any page layout because the Field Level Security is set in the previous step.



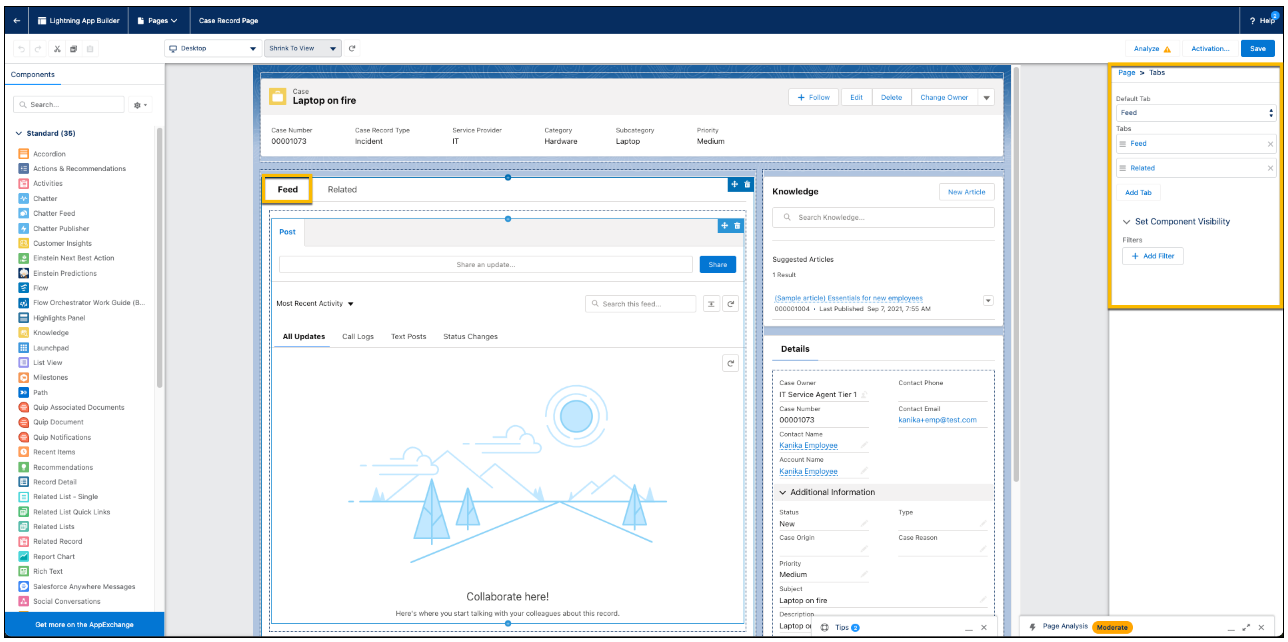
2. Disable the Feed component visibility for the agent user.
   a. From Setup, in Quick Find box, enter *`Lightning App Builder`*, and then select **Lightning App Builder**.
   b. From the Lightning Pages menu, select your Case Record Page, and then click **Edit**.

      For HR Service Center, select **HR Case Record Page Layout**.

      For Employee Concierge (Agent Desk), select **IT Case**.

You see the **Case Record Page** open in the Lightning App Builder.

c. From the **Case Record Page**, click any component that you don't want the agent user to see, and then proceed to the component attributes menu.
For example, you can select **Feed** and then configure its settings.



d. From the Set Component Visibility dropdown, click **+ Add Filter**.

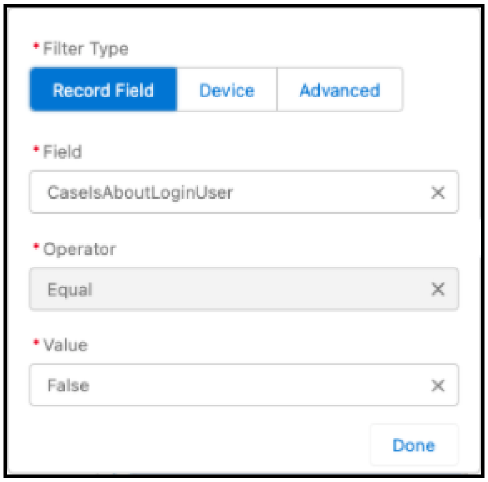
e. Set the filter with these configurations.

a. For Filter Type, select **Record Field**.

b. For Field, select **CaseIsAboutLoginUser**.

c. For Operator, select **Equals**.

d. For Value, select **False**.



f. Click **Done**, and save your updates.

   Important: If you haven't activated your record page, click **Activate**.

Configure Employees Who Are Service Agents as Two Separate Users

Whether you're a new or existing Work.com installer, you can configure the employees who are Service Agents in your organization as two separate users. This configuration gives the Employee user who is also a Service Agent user access to the Service Console so they can manage tickets and cases without seeing the tickets and cases they submitted as an Employee user in Employee Workspace.

Separation of Employee users from their Service Agent user requires specific permission set assignments and the creation of two separate logins for the Employee user andService Agent user. To do so, you must complete these Work.com setup steps:

1. Create and Link Employees and Users on page 89 for your organization.
2. Complete the Employee-User link process on page 35.
3. Set the HR Service Center or Employee Concierge permission set assignments.

From these setup steps, new Work.com installers then Create a Separate Service Agent User for Each Employee User on page 254. For existing Work.com installers, you Modify Your Existing Agent Users and Create Additional Employee Users on page 255. These solutions differ for new and existing installers because:

- New installers create separate agent users as part of their Work.com setup process.
- Existing installers must review the updated permission set assignments, and then remove and reassign permission sets to the existing agent users that you created when you set up Work.com.

Although you can implement either solution, we recommend that you implement the solutions that are indicated for your installation status.

Create a Separate Service Agent User for Each Employee User
Create a separate Service Agent user for each Employee user in your organization, and then assign the proper permission configurations.

Modify Your Existing Users to Make Them Employees Only and Create Additional Service Agent Users
Separate the existing Service Agent users from their Employee users.

Create a Separate Service Agent User for Each Employee User

Create a separate Service Agent user for each Employee user in your organization, and then assign the proper permission configurations.

Before you begin, complete these prerequisites:

1. Create and Link Employees and Users on page 89 for your organization.
2. Complete the Employee-User link process.
3. Set the HR Service Center on page 192 or Employee Concierge permission set assignments.

This task assumes that there are significantly more people in your organization who are employees only than people who are both an employee and a Service Agent. Therefore, it's best to use the provided steps to manually create a Service Agent user for each employee whose role is a Service Agent.

If you must create a large number of Service Agent users, consider using a data loading tool to automate the process, such as the Salesforce Data Loader. Review the associated Data Loader content that details how to configure and use the Salesforce Data Loader.

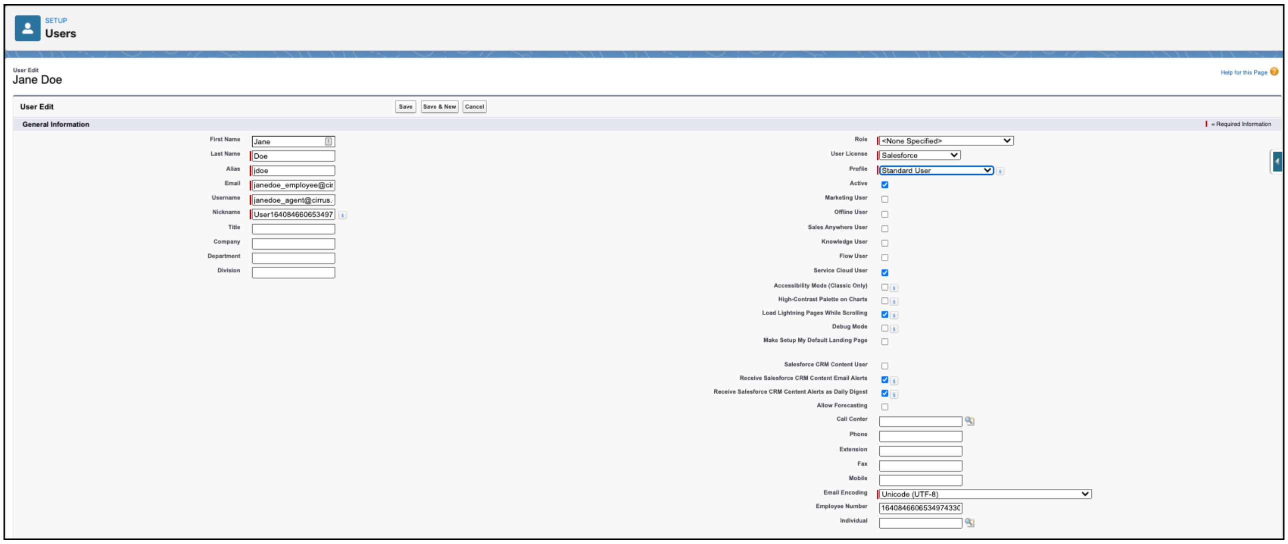
Completing this task creates a Service Agent user login and an Employee user log in for the employee who is a Service Agent. The agent user login is used to access the Service Console to handle support tickets and cases. To access the Employee Workspace, the original employee login is used.

As you complete the task, keep this consideration in mind:

- If you have Omni-Channel case routing enabled and the Employee user who is also a Service Agent user is online in the Service Console, then the case that is raised by this employee in Employee Workspace could be routed to their service agent user in the Service Console. This is a default Omni-Channel case routing behavior.

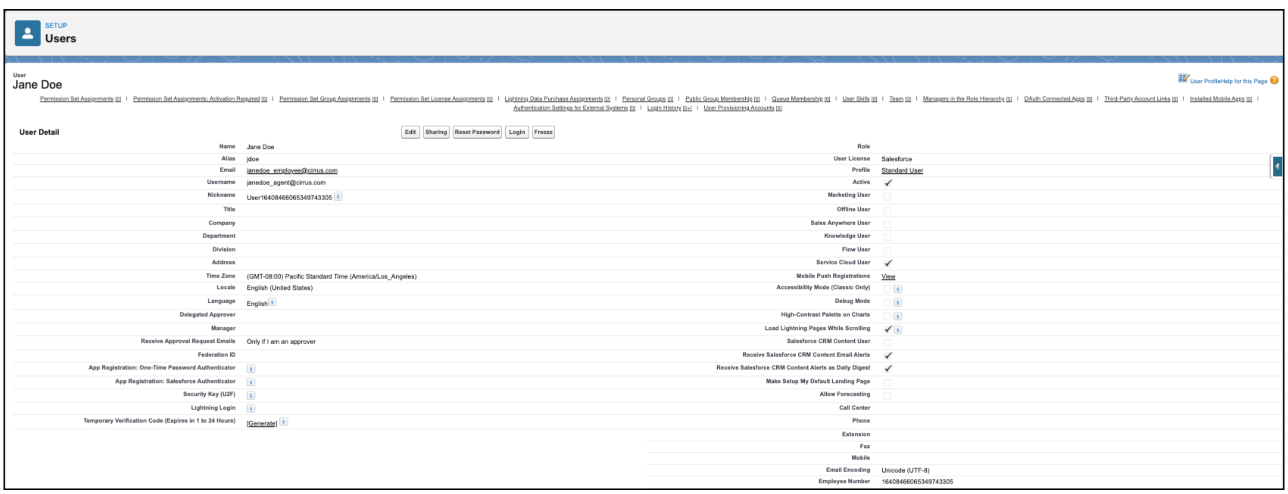
To create a separate Service Agent user for each Employee User:

1. From Setup, in the Quick Find search, enter *Users*, and then select **Users**.
2. From the Active Users page, click **New User**.
3. Enter the listed settings for the required fields based on the Service Agent user. All other non-required fields can be set to your own preferences, and they can be the same or different from the employee user.
   a. Set the `Email` field with the same email alias as the existing employee user.
   b. Set the `Username` field to a different username than the Employee user.
      For example, when an Employee username is *janedoe_employee@cirrus.com*, set the Service Agent username to *janedoe_agent@cirrus.com*. The Service Agent alias is used to log into the Service Console, and the Employee user alias is used to log into Employee Workspace.
   c. Set the `Role` field to **<None Specified>**.
   d. Set the `User License` field to **Salesforce**.
   e. Set the `Profile` field to either **Standard User** for an HR Service Center Agent or **IT Agent** for an Employee Concierge IT Agent.
   f. Select the `Feature License` field to Service Cloud User.
   g. Set the `Employee Number` field to have the same Employee Number as their existing Employee user.
   h. Click **Save & New**.



4. Repeat steps 1–6 for all Service Agents in your organization.
5. Assign the Service Agent permission set assignments for HR Service Center or Employee Concierge on page 126.
6. Assign Service Agent permission set licenses for HR Service Center or Employee Concierge on page 126.
7. Assign Service Agent user permission set groups for for HR Service Center or Employee Concierge on page 126.

Example: Here's an example of a Service Agent user.



Modify Your Existing Users to Make Them Employees Only and Create Additional Service Agent Users

Separate the existing Service Agent users from their Employee users.

Before you begin, ensure you've completed these Work.com installation and set-up processes:

1. Create and Link Employees and Users on page 89 for your organization.
2. Completed the Employee-User link process.
3. Configured the permission sets for your Employee users according to the HR Service Center on page 192 or Employee Concierge on page 126 permission set assignments.

4. Configured the permission sets for your Service Agent users according to the HR Service Center on page 192 or Employee Concierge on page 126 permission set assignments.

   Note: The permission set assignments for HR Service Center and Employee Concierge are updated as of February 2022. Be sure to review the updates.

The task assumes that there are significantly more people in your organization who are only Employees users and not Service Agent users than people who are both. Therefore, it's best for you to manually create new Employee users for each existing Service Agent user.

If you must create a large number of Employee users, consider using a data loading tool to automate the process, , such as the Salesforce Data Loader. Review the associated Data Loader content that details how to configure and use the Salesforce Data Loader.

Completing this task creates two logins for the Employee user who is a Service Agent user. The employee uses their Service Agent user login to access the Service Console to handle support tickets and cases. To access the Employee Workspace, the employee uses their new employee login.

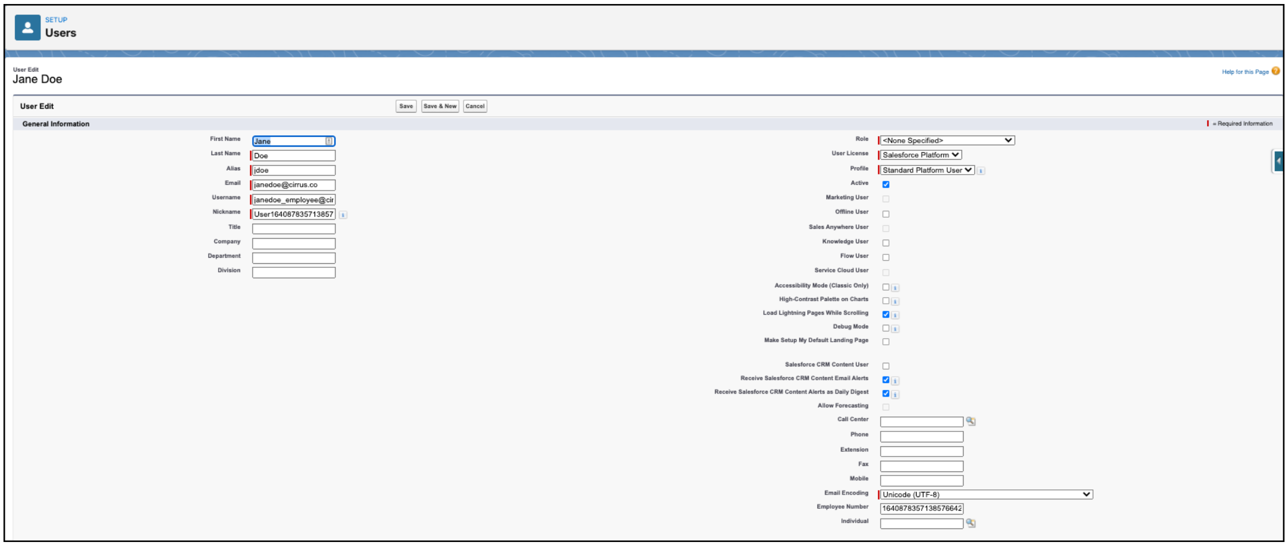
As you complete the task, keep these considerations in mind:

- Service Agent users aren't able to use Employee Workspace and Concierge after you complete these steps. Service Agents users are able to use Employee Workspace and Employee Concierge when they're logged in with their Employee user.
- New employee users don't have access to their employee cases in Employee Workspace or Employee Concierge that were created under their service agent user.
- If you have Omni-Channel case routing enabled and the employee who is also Service Agent user is online in the Service Console, then the case that is raised by this Employee in Employee Workspace could be routed to their Service Agent user in the Service Console.

To execute this solution:

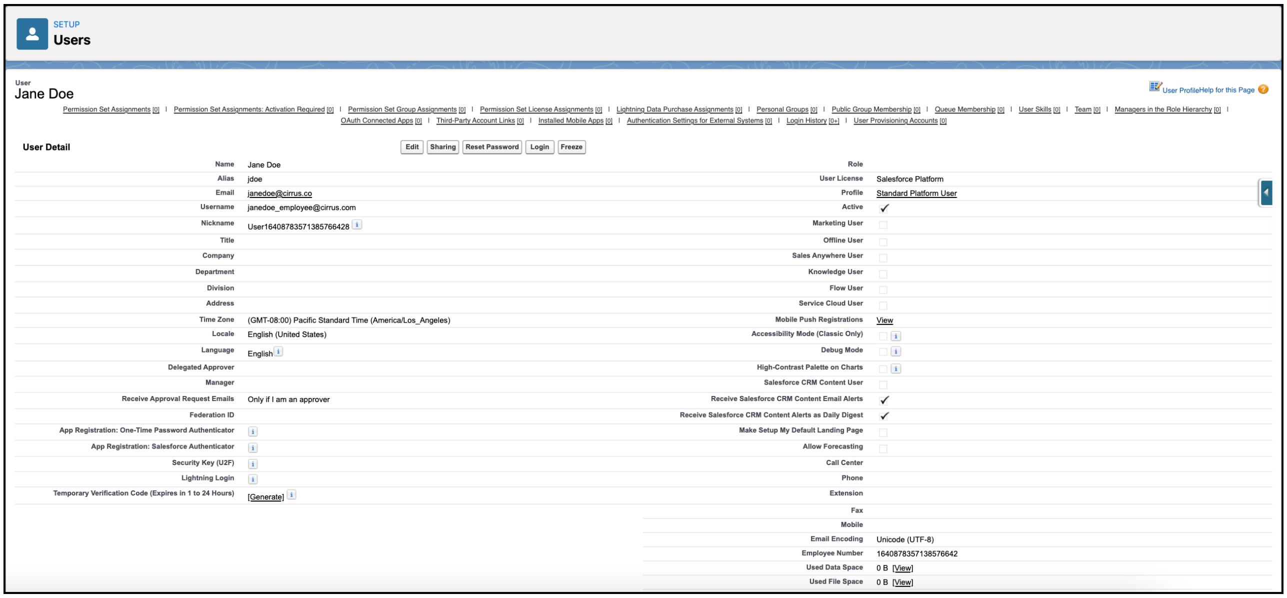
1. Take the steps provided in this Help Article to remove these permission sets from your Service Agent users.
   - Employee Experience
   - Employee Productivity Plus
   - Employee Workspace and Concierge
2. Complete the steps in this Help Article to add the proper HR Service Center or Employee Concierge on page 126 permission set assignments for the Service Agent users.
3. Complete the steps in this Help Article to add the proper HR Service Center or Employee Concierge on page 126 permission set licenses for the Service Agent users.
4. Create a new Employee user for an existing Service Agent user.
   a. From Setup, in the Quick Find box, enter *`Users`*, and then select **Users**.
   b. Set the `Email` field with the same email alias as the existing Service Agent user.
   c. Set the `Username` field with a different username than the current agent user.
      For example, if the current Service Agent username is `janedoe@cirrus.com`, set the Employee username as `janedoe_employee@cirrus.com`. The Service Agent alias `janedoe@cirrus.com` is used to log into the Service Console, and `janedoes_employee@cirrus.com` is used to log into Employee Workspace.
   d. Set the `Role` field to **<None Specified>**.
   e. Set the **User License** to **Salesforce Platform**.
   f. Set the `Profile` field to **Standard User**.
      You can also use a copy of a Standard Platform user.
   g. Set the `Employee Number` filed with the employee record number that Service Agent user contains.

h. Click **Save & New**.



5. Repeat step two for each Service Agent user.
6. For each new Employee user that is created, replace the user record number to match the employee record number.
7. Update the employee record for the existing Service Agent user to map it to the new user record for the Employee user.
   a. From the Employee record page, in the `User` field, enter the name of the new Employee user.
   b. Select the name of the new Employee user.
   c. Save your updates.
8. Assign Employee user permissions sets for HR Service Center or Employee Concierge on page 126.
9. Assign Employee user permission set licenses for HR Service Center on page 192 or Employee Concierge on page 126.
10. Assign Employee user permission set groups for HR Service Center on page 192 or Employee Concierge on page 126.

Example: Here's an example of an Employee user.



Shift Management for Work.com

Guiding your employees back to work isn't as simple as reopening your offices. Organizations must balance workplace coverage and employee availability while creating occupancy models that enable a safe return to work. Shift Management streamlines the process of getting your employees back to work safely.

With Shift Management for Work.com, you can model the capacity of your workplace sites, facilities, and resources. Then, you can incorporate new requirements and policies when you specify how many people to allow on-premises at a time with shifts. Employees review and confirm shifts in the Salesforce mobile app, and receive notifications about their work schedules.

Workplace managers can set staggered employee arrival times to avoid crowding in common areas such as lobbies and elevators. These measures help create appropriate social distancing at your work site so that employees can feel safe and secure.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To set up Shift Management:
- Workplace Command Center permission set license

  Edit on employees

[Invite Employees Back to Work](#)
As you prepare to return people to the workplace, let's look at the steps to take to open up.

[Get to Know Shift Management Personas](#)
Learn about the different types of people that use Shift Management for Work.com. The Shift Management package includes permission sets for the recommended workplace personas.

[Shift Management Considerations](#)
Before you start, here are a few things to know about Shift Management for Work.com.

[How Does Shift Scheduling Work?](#)
Learn the ins and outs of shift scheduling. Understand the differences between managed and self-service scheduling. Find out how staggered arrivals work to spread out the flow of employees into the workplace.

Set Up Shift Management

Shift Management for Work.com is a set of tools to manage the return of employees to the workplace. The Shift Management managed package builds on core Field Service objects and capabilities such as service appointments and schedule optimization. To get set up, first enable Field Service and install managed packages.

Manage Workplaces, Shifts, and Schedules

Set up your location occupancies. Create facility plans to reduce workplace occupancy and stagger arrivals. Then let employees and shift planners work out a shift schedule.

Use the Shift Management Mobile App

Use the mobile app to get your workplace shift schedule. Find shifts, review your schedule, and view your on-site arrival passes.

Invite Employees Back to Work

As you prepare to return people to the workplace, let's look at the steps to take to open up.

Here's how Shift Management helps you get your team back to work—carefully.

1. Admins set up and configure Shift Management for Work.com. Admins or operations managers set the maximum occupancy for locations and sublocations.
2. Your organization's operations or workplace manager creates the facility plan, which sets the reduced occupancy levels. Because the situation changes rapidly, facility plans cover one week at a time. Use the facility plan to create open shifts based on the planned occupancy.
3. Facility managers generate the shifts, then notify employees. Employees use the Salesforce mobile app to manage their shifts.
4. Depending on the type of plan, the shift scheduling process works differently. With managed scheduling, employees confirm availability in the app. Then, team planners match the shifts to available employees and confirm who comes in. With self-service scheduling, team planners sit back while employees book their own shifts.
5. In the app, your employees can confirm their availability for shifts or open the arrival pass.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To manage shifts:

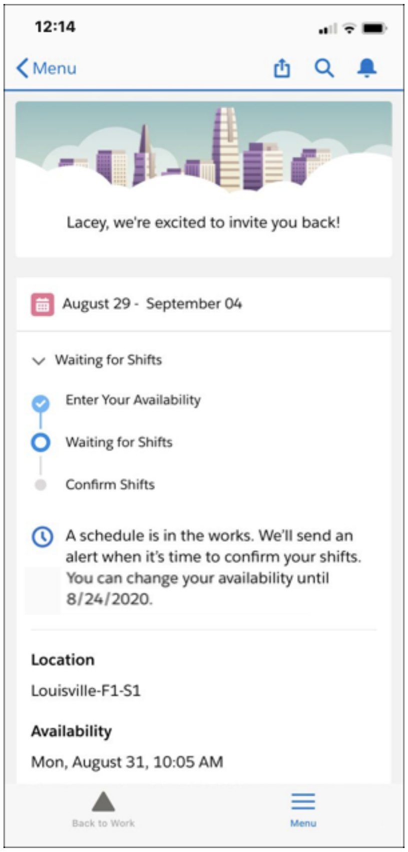
- Workplace Shifts Workplace Manager custom permission set

To set up Shift Management:

- Workplace Command Center permission set license

  AND

  Edit access for the Employee object



Note: We send shift notifications to employees with eligible Wellness Check survey results only. The system checks the employee's Wellness Status before sending notifications.

Be sure to tell employees about your plan. Advise them how to log in to their new user accounts and confirm their shifts. Use the sample email provided to craft your own notifications.

Example: Hi Astro,

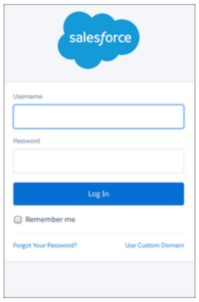
As we transition back to the workplace, we're coordinating our efforts to ensure a safe environment when you return. We'd like your participation with the following:

- Let us know how you're doing by responding to regular health and wellness surveys.
- If you're ready to come back to work, we coordinate a schedule for you that fits with our COVID-19 response plan.

When the plan is in place, we send you instructions to create an account for the Back to Work Salesforce app. Look for notifications about available shifts, then log in to confirm your schedule.

To prepare for our reopening, please do the following:

1. Download the Salesforce mobile app, if it's not already installed.
   - App Store
   - Google Play
2. When you receive an email with your new login, follow the prompts to verify your account.
3. In the Salesforce app, tap **Use Custom Domain** and enter `https://`***`myDomain`***`.lightning.force.com`. Then, log in with your username and password.



If you have questions, contact `Your Workplace Contact`. We look forward to seeing you soon!

SEE ALSO:

- Download and Log In to the Salesforce Mobile App
- Create Employee Logins for the Shift Management App

Get to Know Shift Management Personas

Learn about the different types of people that use Shift Management for Work.com. The Shift Management package includes permission sets for the recommended workplace personas.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

Shift Management Personas

Depending on your organization, employees can be students, volunteers, or other groups of shift management users. Facility plans with self-service scheduling use the facility manager and employee personas. Plans with managed scheduling use the facility manager, employee, and shift planner personas. Facility manager permissions are a superset of shift planner permissions.

Persona	Description	Permission sets
Employee	Employees log in to the Salesforce mobile app to manage shifts. They can accept or reject available workplace shifts and open the arrival pass when they come in.	Workplace Shifts Employee, Workplace Shifts Employee App Settings
Shift planner	Assigns and manages shifts for employees. In managed scheduling, shift planners are responsible for assigning shifts to employees and finalizing the schedule.	Workplace Shifts Shift Planner, Workplace Shifts Shift Planner App Settings AND FSL Dispatcher Permissions, and FSL Dispatcher License
Facility manager or workplace manager	Create weekly facility plans that define the reduced occupancy	Workplace Shifts Workplace Manager, Workplace Shifts

Persona	Description	Permission sets
	and staggered arrivals. Facility managers generate the open shifts (service appointments).	Workplace Manager App Settings
Command Center user	Views shift data in the Workplace Command Center.	Workplace Shifts Command Center, Workplace Shifts Command Center App Settings
Shift Management Admin	Installs managed packages and sets up the org for other users.	Workplace Shifts Admin

Permission Sets

During setup, permission sets get assigned to your users. You can assign command center users the necessary permission sets to view shift data in the dashboard.

Permission set	Description
Workplace Shifts Admin	Gives access to workplace Shift Management administration and setup.
Workplace Shifts Command Center	Gives access to shift data accessible in a Command Center component.
Workplace Shifts Command Center App Settings	Provides access to Apex classes that calculate shift metrics for the Command Center Shifts-at-a-Glance component.
Workplace Shifts Employee	Gives access to edit shifts and service appointments and use workplace Shift Management in the mobile app.
Workplace Shifts Employee App Settings	Sets app and tab accessibility for workplace employees.
Workplace Shifts Shift Planner	Gives access to view and assign shifts and manage employee availability for workplace Shift Management.
Workplace Shifts Shift Planner App Settings	Sets app and tab accessibility for shift planners. Provides access to Apex classes and to run flows.
Workplace Shifts Workplace Manager	Gives access to create facility plans and view workplace hierarchies. Includes the permissions in the Workplace Shifts Shift Planner permission set.
Workplace Shifts Workplace Manager App Settings	Sets app and tab accessibility for workplace managers.

Shift Management Considerations

Before you start, here are a few things to know about Shift Management for Work.com.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

Keep the following considerations in mind as you get ready to set up Shift Management for Work.com.

Salesforce Org Guidelines

- To avoid interfering with your existing Field Service and Lightning Scheduler implementations, don't install Shift Management in a Salesforce org where Field Service or Lightning Scheduler is already enabled.
- To limit access to employee data, install Work.com apps, including Shift Management, in an org that's used only for human resources. This way, Work.com admins can access employee data, but admins for your company's other orgs can't. If you have questions about setting up a new org used only for human resources, contact your Salesforce Account Executive.

Employee, Location, Service Territory, and Service Resource Objects

Review your location hierarchies and employee data. When you set up Workplace Command Center, you create or import location and employee data. During setup, Shift Management copies your location and employee data into the service territory and service resource objects. Availability—the times that employees can come in—is defined in the Shift object. Scheduled shifts are stored in the Service Appointment object.

Keep these considerations in mind when you organize your locations and employees:

- A top-level location can be a building with a physical address. It's the place where employees come to work. Top-level locations can also be cities or geographic regions.
- When you set up shift management, you choose which location types represent workplaces for facility planning. If you choose to create staggered arrivals for each day, the scheduling engine uses the facility plan's location to schedule employee shifts.
- Location names are limited to 40 characters. When service territories get created from locations, locations with names longer than 40 characters aren't imported to shift management.
- You create shifts at the lowest level of your location workplace hierarchy, such as spaces. You assign employees to locations at the lowest level of the location hierarchy so that they can be matched with shifts.
- You can assign up to 500 service resources to a service territory. To avoid reaching the limit, create sub-locations for any location with more than 500 employees.
- Email is required in the employee's User record, and it's used to create a unique username for managing shifts. So it's recommended that employees have a working email address.
- Make sure that there are no duplicate emails in the User object records. During setup, service resource records get created from your employee records. If the employee doesn't have and associated Individual record, the system looks for a User record that matches the employee. If there's no match in either object, a User record gets created for the employee.
- Employees are assigned to service territory locations through their service territory membership. Employees receive shift notifications based on the primary service territory membership. Notifications aren't sent based on secondary territory memberships.

Wellness Status and Shifts

- An employee's wellness status determines whether they can use the shift management app and accept shifts. When the status is Available to Work, employees can use the app and accept shifts. If the status changes to unavailable or unknown, previously accepted shifts are canceled. The system creates resource absences for one months to mark the schedule. If the wellness status changes to unavailable on the same day as a previously scheduled shift, the shift isn't canceled.
- When a previously unavailable employee becomes available for work, the system deletes the service resource absences and employees can then accept shifts.

Mobile App

- The Shift Management managed package includes a mobile app. During setup, you choose which app tab to use, Shift Booking or Back to Work.
  - The Shift Booking tab works with self-service facility plans to let employees book shifts at any open location.
  - The Back to Work tab lets employees find shifts at their assigned location only. It works with self-service and managed scheduling facility plans.
- Your employee users must install the Salesforce mobile app on a compatible mobile phone. When you set up passwords for their shift management users, they receive an email to verify the new account.
- The time zone associated with a location is used to create the service territory's time zone. Employees use the time zone assigned to their service territory location.
- A Salesforce org can send up to 20,000 iOS and 10,000 Android push notifications per hour (for example, 4:00 to 4:59 UTC). This limit affects orgs with more than 10,000 Android or 20,000 iOS users. You can contact Salesforce Support to increase the limit.

SEE ALSO:

Salesforce Help: Field Service Limits and Limitations

Salesforce Help: Considerations for Salesforce Mobile App Notifications

Salesforce Developer Guides: Push Notification Limits

How Does Shift Scheduling Work?

Learn the ins and outs of shift scheduling. Understand the differences between managed and self-service scheduling. Find out how staggered arrivals work to spread out the flow of employees into the workplace.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

Managed or self-service scheduling?

Shift management offers two types of scheduling. You choose the type of scheduling when you create a facility plan.

- Self-service scheduling—Facility managers create shifts and let people know that booking is open. Employees find and book their preferred shifts in the mobile app. There's no need for shift planners to manage the schedule. When you set up the mobile app, you can choose whether to use the Shift Booking or Back to Work tab. The Shift Booking tab lets employees reserve shifts at any location with a facility plan. In contrast, the Back to Work tab shows available shifts at the employee's assigned workplace only.
- Managed scheduling—Shift planners assign and send out shifts to employees. Employees confirm availability and accept shifts in the mobile app. But planners are responsible for finalizing the schedule. Employees use the Back to Work tab in the mobile app and can be scheduled for shifts at their assigned workplace only.

Self-service scheduling

With self-service scheduling, employees choose from available shifts and confirm what they want. Facility managers create the plan, then generate the set of open shifts.

When you generate shifts, you get a set of service appointments based on the planned occupancy. If you set staggered arrivals, the staggering process runs immediately and adds arrival start and end times to the shift appointments. If there are more service appointments than fit within the staggering window, the arrival windows are blank on the extra records. Employees can book these additional shifts by choosing a start time outside the staggering window.

You can send a mobile notification to let employees know that booking is open. Only employees assigned to the facility, and with the wellness status of Available to Work, receive a notification. Employees can choose from any shift within the facility plan's service territory.

In the mobile app, employees search for shifts by arrival times. For example, searching with a start time of 9:00 AM finds shifts where the arrival window contains 9:00 AM. Depending on the arrival windows, that can include shifts that start from 8:45—9:00 AM and 9:00—9:15 AM, or a single window like 8:50—9:10 AM. If the arrival window is 7:00—10:00 AM and an employee searches for 11:00 AM, they find only shifts without arrival start and end times.

When an employee books a shift, the following process takes place behind the scenes:

- If the location doesn't match the employee's primary service territory, a one-day service territory membership of type Relocation is created for the shift's service territory.
- A Shift record is created for the service resource and the service territory location. The shift uses the scheduled start time from the linked Service Appointment. The duration is set from the Availability Duration in the app settings.
- The Service Appointment is scheduled. The start time is the beginning of the Arrival Window or the employee's Preferred Start Time if there’s no arrival window. The Status changes to Accepted.

Managed scheduling

When you use managed scheduling, shift planners assign service appointments and confirm the schedule with employees. Here's how it works.

Workplace managers review the facility plan and generate shifts. When you generate shifts, the system creates a set of service appointments. The service appointments represent open shifts based on the planned occupancy. For example, if the planned occupancy in a workspace on the 10th floor of the Denver office is 15, then 15 service appointments are created for each day in the facility plan. Like employee shifts, service appointments are created only at the lowest-level service territories in your location hierarchy.

Then, invite employees to confirm their availability in the mobile app. When the availability request is sent, the system creates shifts with the status Tentative for all the employees assigned to service territories within the facility. Only employees with the status of Available to Work receive a notification.

Employees can respond until the availability due date in the facility plan. When an employee saves or updates their availability, it's reflected in the Shift Schedules tab. Confirming availability changes the shift's status from Tentative to Confirmed. After the due date, employees who didn't respond or weren't available are ineligible for shifts.

Shift planners review the schedule. The optimization engine creates a tentative schedule based on workplace occupancy and employee availability. Shift planners must set the status of the service appointments to Dispatched. Only dispatched appointments are visible in the mobile app for employees to accept or decline.

When an employee accepts a shift, the service appointment changes to Confirmed. The status is reflected in the Shift Schedules tab. An arrival pass is available in the mobile app. Employees can use the pass to confirm that it's time for their shift when they arrive at the workplace.

Employee availability for shifts

Employees can use the mobile app and book shifts when these conditions are met:

- The employee is active
- The Worker Type is Employee
- The Wellness Status is Available to Work

- A service territory membership links the employee's Service Resource record to the service territory. To receive shifts, the territory membership must last for the full duration of a facility plan.

An employee's wellness status determines whether they can use the shift management app and accept shifts. When the status is Available to Work, employees can use the app and accept shifts. When an unavailable employee logs into the app, they see an error message.

If the employee's status changes to unavailable, previously accepted shifts are canceled. The system creates resource absences for one month to mark the schedule.

Set Up Shift Management

Shift Management for Work.com is a set of tools to manage the return of employees to the workplace. The Shift Management managed package builds on core Field Service objects and capabilities such as service appointments and schedule optimization. To get set up, first enable Field Service and install managed packages.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To set up Shift Management:
- Workplace Command Center permission set license

  Edit on employees

Prerequisites

Install and configure the Workplace Command Center. Ensure myDomain is deployed to all users.

1. Set Up Field Service for Shift Management

   Shift management uses standard Field Service objects such as service appointments, shifts, and service resources. For a more efficient shift planning experience, install the Field Service managed package and take advantage of scheduling optimization. Before you set up shift management, we show you how to install and configure Field Service and the Field Service managed package.

2. Install the Shift Management Managed Package

   Install the Shift Management managed package to add new fields, objects, permission sets, and apps to your Salesforce org.

3. Configure Shift Management for Work.com

   With the Shift Management managed package installed, you're ready to add the finishing touches. Create a user profile for your employees and assign the right apps. Customize page layouts to control what appears in the mobile and desktop apps. Activate flows and choose Field Service settings.

4. Complete the Recommended Setup for Shift Management

   Use the Shift Management Setup tab to complete the recommended setup. Choose defaults for your data and assign permissions to managers and planners.

5. Create Employee Logins for the Shift Management App

   After you set up Shift Management, create logins for your employees so that they can manage their availability and workplace shifts in the Salesforce mobile app.

6. Update an Existing Shift Management Org

   Shift Management for Work.com is a managed package. Existing Work.com orgs automatically receive new versions of the package, and most new features and changes are already enabled. But some features must be configured after an upgrade to keep the org updated.

SEE ALSO:

Set Up Workplace Command Center

Set Up Field Service for Shift Management

Shift management uses standard Field Service objects such as service appointments, shifts, and service resources. For a more efficient shift planning experience, install the Field Service managed package and take advantage of scheduling optimization. Before you set up shift management, we show you how to install and configure Field Service and the Field Service managed package.

1. Enable Field Service for Shift Management
   Enable Field Service to get the objects and scheduling features that you need for Shift Management.
2. Install the Field Service Managed Package for Shift Management
   After Field Service is enabled, install the Field Service managed package to get other features like scheduling optimization.
3. Customize Field Service Settings for Shift Management
   Customize Field Service settings to get your Salesforce org ready for shift management. Because shift management builds on Field Service and features from the Field Service managed package, we set things up just so.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

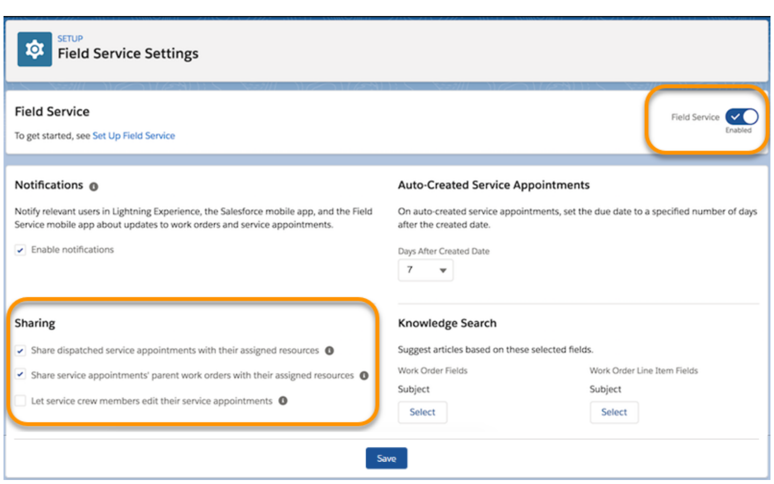
USER PERMISSIONS

To manage shifts:
- Workplace Shifts Workplace Manager custom permission set

Enable Field Service for Shift Management

Enable Field Service to get the objects and scheduling features that you need for Shift Management.

1. From Setup, enter `Field Service Settings` in the Quick Find box, then select **Field Service Settings**.
2. Enable Field Service.
3. Select the following Sharing options:
   - **Share dispatched service appointments with their assigned resources**
   - **Share service appointments' parent work orders with their assigned resources**
4. Save your changes.



EDITIONS

Available in: Lightning Experience

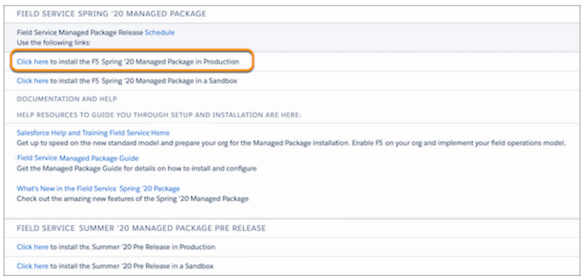
Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

Install the Field Service Managed Package for Shift Management

After Field Service is enabled, install the Field Service managed package to get other features like scheduling optimization.

1. Navigate to this URL in your browser: `https://fsl.secure.force.com/install`
2. Click the link to install the latest version of the Field Service managed package in production.



3. If you logged out of your Salesforce org, enter your Salesforce credentials.
4. Select **Install for Admins Only**.
5. Select the acknowledgment then click **Install**.
6. Select **Yes**, grant access to these third-party web sites then click **Continue**.
7. If a message indicates that the installation is taking longer than expected, click **Done**. You receive an email notification after the installation is complete.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To set up Shift Management:
- Workplace Command Center permission set license

  Edit on employees

Customize Field Service Settings for Shift Management

Customize Field Service settings to get your Salesforce org ready for shift management. Because shift management builds on Field Service and features from the Field Service managed package, we set things up just so.

Change Sharing Settings

Set the sharing defaults for Field Service objects so that the right users see the right records in shift management.

1. In Setup, enter *`Sharing Settings`* in the Quick Find box and click **Sharing Settings**.
2. Click **Edit**.
3. In the Default Internal Access column, select Private for these objects:
   - Service Appointment
   - Service Resource
   - Service Territory
   - Shift
   - Work Order
4. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To set up Shift Management:
- Workplace Command Center permission set license

  Edit on employees

Create Permission Sets

Create the Field Service permission sets required by shift management.

1. From the App Launcher , select the **Field Service Admin** app.
2. Click the **Field Service Settings** tab.
3. Click **Getting Started | Permission Sets**.
4. Click **Create Permissions** for the following permission sets:
   - FSL Dispatcher
   - FSL Resource
   - FSL Admin

The Create Permissions link is replaced by a message indicating that it's up to date.

Activate the Optimization User

The optimization user allows shift planners to use schedule optimization to fill workplace capacity.

1. From the App Launcher , select the **Field Service Admin** app. Click the **Field Service Settings** tab.
2. Click **Optimization | Activation**. To create an optimization profile and user that are used during activation, click **Create Optimization Profile**.
3. When you're prompted, switch to the newly created optimization user to set up your optimization.
   a. From **Setup**, navigate to the Users page and locate the optimization user.
   b. Click **Edit** next to the user and select **Active** on their profile.
   c. Select **Generate new password and notify user immediately**.
   d. Log out.
4. When you receive a password reset email, click the link and complete the steps to log in as the optimization user.
5. When you're logged in, click the + icon in the tab bar to see your full list of tabs. Click the **Field Service Settings** tab.
6. Click **Activate Optimization**.
7. Click **Allow** to allow remote site access and be redirected back to **Field Service Settings**.
8. Log out as the optimization user and log back in with your admin username and password.

SEE ALSO:

Limit Access to Field Service Records

Create Field Service Permission Sets

Set Up Optimization

Install the Shift Management Managed Package

Install the Shift Management managed package to add new fields, objects, permission sets, and apps to your Salesforce org.

1. Navigate to this URL in your browser: `https://fsl.secure.force.com/work`
2. Click **Install in Production**.
3. If you logged out of your Salesforce org, enter your Salesforce credentials.
4. Select **Install for Admins Only**.
5. Select the acknowledgment then click **Install**.
6. Select **Yes**, grant access to these third-party web sites then click **Continue**.
7. If a message indicates that the installation is taking longer than expected, click **Done**. You'll receive an email notification after the installation is complete.

When you install the Shift Management package, new fields, objects, permission sets, and apps are added to your Salesforce org.

The following objects are added or updated:

- Facility_Plan__c
- Location
- PlanningPeriod__c
- ServiceAppointment
- ServiceResource
- ServiceTerritory
- Shift
- Shift_Management_Metric__c
- ShiftAcceptNotification__c
- Territory_Parent_Update_Evt__e
- WorkOrder

The Shift Management app is added to your Salesforce org, and the Back To Work mobile app is added in the Salesforce mobile app.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To set up Shift Management:

- Workplace Command Center permission set license

  Edit on employees

SEE ALSO:

Shift Management Managed Package

Configure Shift Management for Work.com

With the Shift Management managed package installed, you're ready to add the finishing touches. Create a user profile for your employees and assign the right apps. Customize page layouts to control what appears in the mobile and desktop apps. Activate flows and choose Field Service settings.

Make the following changes to your Salesforce org.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To set up Shift Management:
- Customize Application

  AND

  FSL Admin Permissions custom permission set

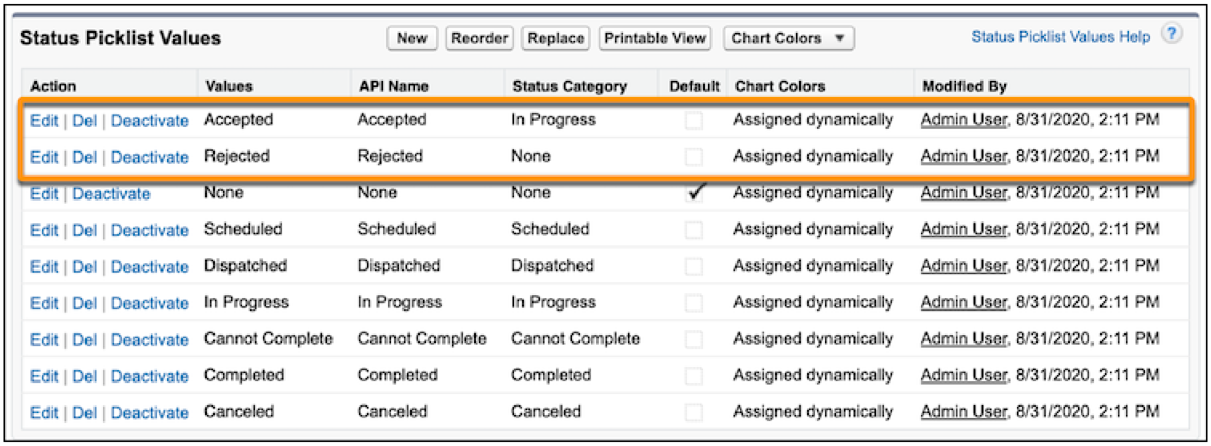
Customize Permissions

1. As the admin user, assign the permission set FSL Admin Permissions to yourself.
   a. From Setup, in the Quick Find box, enter `users`, and then select **Users**.
   b. Open your user record.
   c. Hover over **Permission Set Assignments** and click **Edit Assignment**.
   d. Add FSL Admin Permissions to the enabled permission sets.
   e. (Optional) To access the Shift Schedules tab, assign yourself FSL Dispatcher License and FSL Dispatcher Permissions. Shift Management for Work.com uses the Field Service dispatcher console.
   f. Save your changes.
2. Create a custom user profile for employees.
   a. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.
   b. For the Standard Platform User Profile, click **Clone**. Then name and save the cloned profile. For example, `Shifts Employee User Profile`. Use this new profile when you create users in Shift Management Settings.

Update the Service Appointment and Facility Plan Objects

In Object Manager, add the values Accepted and Rejected to the Status field on the Service Appointment object. To simplify the mobile app, remove global actions from the page layouts.

1. From Setup, click Object Manager.
2. Click **Service Appointment** and then click **Fields & Relationships**.
3. Click Status.
4. In the **Status Values Picklist** area, click **New** and add the following two picklist values:
   - Accepted. For Status Category, select **In Progress**.
   - Rejected. For Status Category, select **None**.



Status Picklist Values — New | Reorder | Replace | Printable View | Chart Colors — Status Picklist Values Help

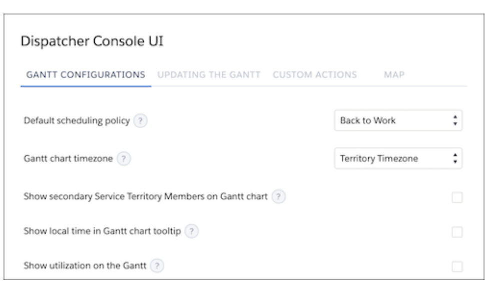
Action	Values	API Name	Status Category	Default	Chart Colors	Modified By
Edit | Del | Deactivate	Accepted	Accepted	In Progress		Assigned dynamically	Admin User, 8/31/2020, 2:11 PM
Edit | Del | Deactivate	Rejected	Rejected	None		Assigned dynamically	Admin User, 8/31/2020, 2:11 PM
Edit | Deactivate	None	None	None	✓	Assigned dynamically	Admin User, 8/31/2020, 2:11 PM
Edit | Del | Deactivate	Scheduled	Scheduled	Scheduled		Assigned dynamically	Admin User, 8/31/2020, 2:11 PM
Edit | Del | Deactivate	Dispatched	Dispatched	Dispatched		Assigned dynamically	Admin User, 8/31/2020, 2:11 PM
Edit | Del | Deactivate	In Progress	In Progress	In Progress		Assigned dynamically	Admin User, 8/31/2020, 2:11 PM
Edit | Del | Deactivate	Cannot Complete	Cannot Complete	Cannot Complete		Assigned dynamically	Admin User, 8/31/2020, 2:11 PM
Edit | Del | Deactivate	Completed	Completed	Completed		Assigned dynamically	Admin User, 8/31/2020, 2:11 PM
Edit | Del | Deactivate	Canceled	Canceled	Canceled		Assigned dynamically	Admin User, 8/31/2020, 2:11 PM

5. Click **Page Layouts**.
   - Edit the Service Appointment Layout.
   - In the **Salesforce Mobile and Lightning Experience Actions** section, remove all the actions from the layout.
   - Assign the page layout to the default profile you assigned to employees in the Shift Management app settings.
6. From the Object Manager, click **Facility Plan**.
   - Click **Page Layouts**.
   - Edit the Facility Plan Layout.
   - In the **Salesforce Mobile and Lightning Experience Actions** section, remove all the actions from the layout.
   - Assign the page layout to the default profile you assigned to employees in the Shift Management app settings.

Update Field Service Settings in the Shift Management App

In the Shift Management app, update the Field Service Settings.

1. From the App Launcher, select **Shift Management**. Select the **Field Service Settings** tab.
2. Click **Dispatcher Console UI** and then click **Gantt Configurations**. Make the following changes:
   a. Set the Default scheduling policy to **Back to Work**.
   b. Set the Gantt chart timezone to **Territory Timezone**.
   c. Deselect **Show utilization** on the Gantt.
   d. Save your changes.



3. Click Service Appointment Life Cycle. On the Status Transitions tab, disable service appointment status transitions.

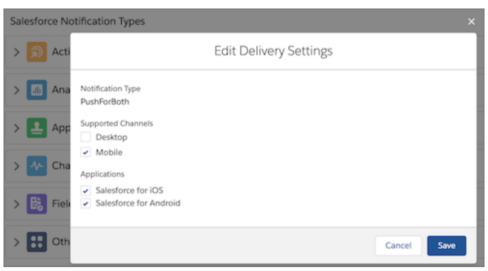
Activate Flows

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.
2. Open the following flows in Flow Builder and click **Activate** in the button bar.
   - Arrival Window Calculator
   - Create ShiftShare Records
   - sendGeneralNotification

   Note: After upgrades to the Shift Management managed package, check these flows and activate the latest version.

Enable the Mobile App and Notifications

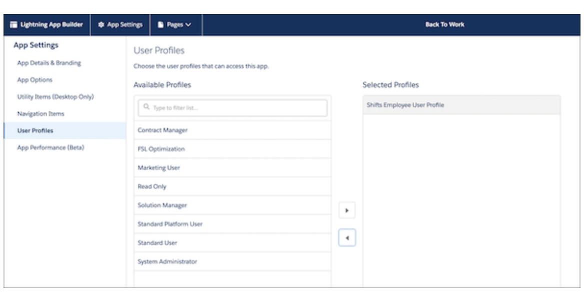
1. From your phone or mobile device, log into the Salesforce mobile app.
2. From your desktop browser, go to **Setup**. Enter `notification` in the quick find box, then select **Notification Delivery Settings**.
3. Edit **PushForBoth**.
4. Under Supported Channels, check **Mobile**. Optionally, check **Dekstop**.
5. Under Applications, check **Salesforce for iOS** and **Salesforce for Android**.



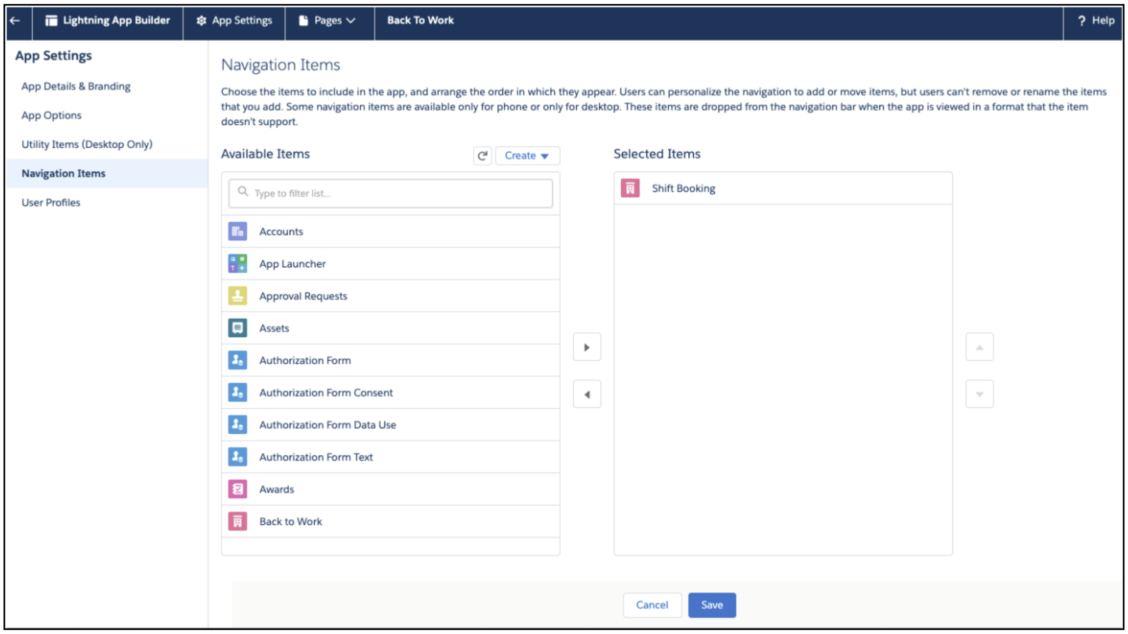
6. Save your changes.

Assign and Configure the Mobile App

1. From Setup, in the Quick Find box, enter `app`, and then select **App Manager**.
2. Locate the Back to Work app and click **Edit** in the Action menu.
3. Go to **User Profiles**.
4. In the Available Profiles list, select the profile you cloned and then click **Add**.
5. Select any other profiles in the Selected Profiles list and click **Remove**.



6. Click **Navigation Items**.
7. Add one of these tabs to the Selected Items:
   - To let employees self-schedule shifts at any available workplace (multi-location booking), select **Shift Booking**.
   - To use managed scheduling, select **Back to Work**.



Set the Default Facility Plan Page Layout

To use the multi-location Shift Booking tab in the mobile app, follow these steps.

1. Go to **Setup** > **Object Manager** and click **Facility Plan**.
2. Click **Lightning Record Pages**.
3. Open the Shift Booking page, then click **View**.
4. To assign the page as the org default, click **Activation...**
5. Set the page as the org default. Make sure to include the Phone form factor.
6. **Save** your changes.

Remove Unnecessary Items from the Shift Schedules Tab (Optional)

To help shift planners focus on what matters, we recommend removing some features in the Shift Schedules tab (called the Dispatcher Console in Field Service). Remove custom permissions from the FSL Dispatcher Permissions permission set.

Note: The Shift Schedules tab is used when your team creates facility plans with managed scheduling. Skip these steps if you use only self-service scheduling for facility plans.

1. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.
2. Click **FSL Dispatcher Permissions** and then click **Custom Permissions**.
3. Click **Edit** and remove all the Enabled Custom Permissions except the following permissions:
   - FSL.Bulk Dispatch
   - FSL.Bulk Optimize

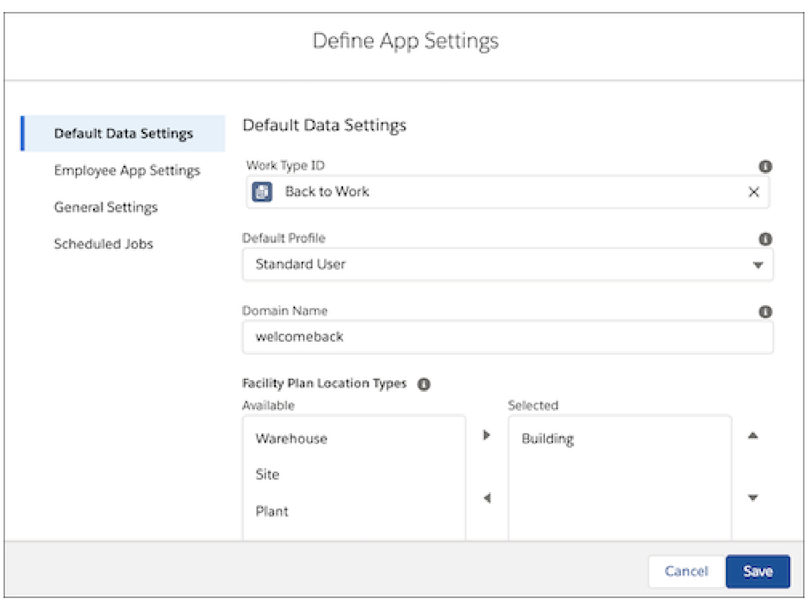
- FSL.Bulk Schedule
- FSL.Bulk Unschedule
- FSL.Create Absences from Gantt
- FSL.Schedule
- FSL.Service List View - Gantt
- FSL.Service List View - Scheduled
- FSL.Service List View - Todo
- FSL.Service List View - Selected
- FSL.Service List View - Unscheduled

4. Save your changes.

Complete the Recommended Setup for Shift Management

Use the Shift Management Setup tab to complete the recommended setup. Choose defaults for your data and assign permissions to managers and planners.

1. From the App Launcher, search for `shift` and select **Shift Management Setup**.
2. Find Add Permissions Sets and click **Add**. This step adds permission sets for admins, shift planners, workplace managers, and employees. As the admin user, assign the permission set Workplace Shifts Admin to yourself before you continue.
   a. From Setup, in the Quick Find box, enter `users`, and then select **Users**.
   b. Open your user record.
   c. Hover over **Permission Set Assignments** and click **Edit Assignment**.
   d. Add Workplace Shifts Admin to the enabled permission sets.
   e. Save your changes.
3. Find Define App Settings and click **Setup**.



EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To set up Shift Management:
- Workplace Command Center permission set license

  Edit on employees

a. For the **Work Type Id**, search for and select **Back to Work**. This default provides a shift length of 8 hours. Workplace managers can select a different work type when they create facility plans.

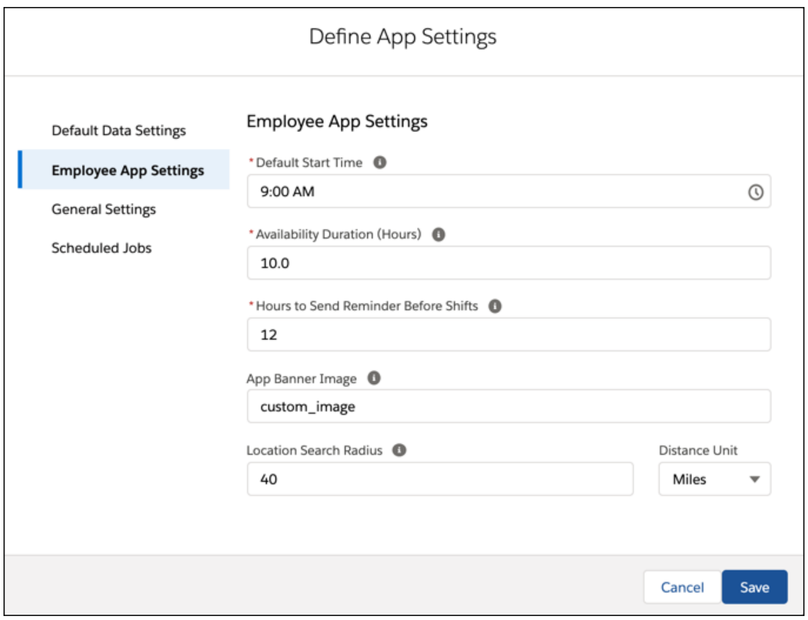
   You can't choose a work type that creates service appointments automatically. Make sure that custom work types don't have **Auto-Create Service Appointment** selected.

b. For the **Default Profile Id**, select the profile to use when field service users are created. Use the new profile that you created by cloning the Standard Platform User. For example, Shifts Employee User Profile.

c. Enter a domain name. The domain name is used to create unique usernames for your employees in the format `Email.domain name`. For example, if the email is `sylvia.curan@example.com` and the domain is `backtowork`, then you see the username `sylvia.curan@example.com.backtowork`.

d. Select which location types to use for facility plans. Workplace managers can create facility plans only for service territories with location types that match the ones you choose here.

e. On the Employee App Settings tab, set a default start time, the availability duration for scheduling, and a shift reminder period. Optionally, change the mobile app banner image by referencing a static resource in your Salesforce org. If you chose the Shift Booking mobile app tab, set the search radius for nearby locations.



f. On the General Settings tab, select the option to require unique location names.

g. On the Scheduled Jobs tab, activate all the scheduled jobs.

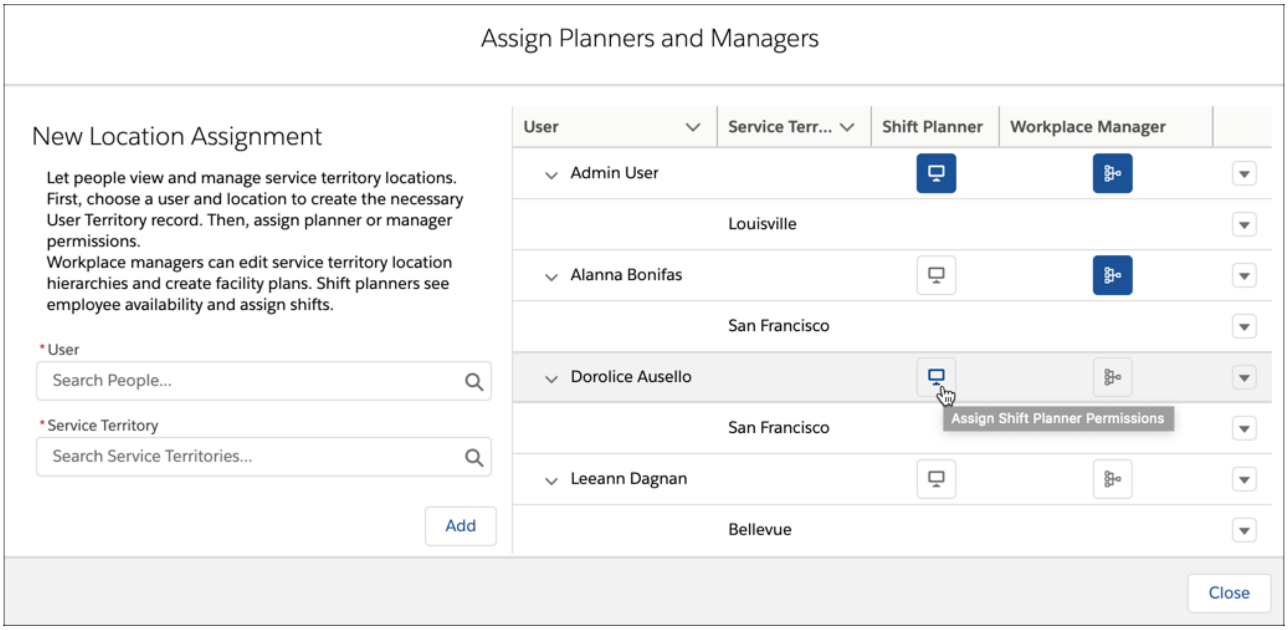
h. Save your changes.

4. To add employee and location data to the shift management app, find Add Employees and Locations and click **Start**.
   During the import process, we copy employee and location data into the service appointment and service territory objects required for shift management. If you add more employees and locations, you can return to this setup page to import data again.

5. To assign user permissions, find Assign Planners and Managers and click **Start**.

   a. To create a user Territory record, select a user and location. Click **Add**.
      The User Territory gives the person access to view and manage people and appointments within the location territory. When you create the user territory record, a row is added to the permissions screen.

b. To assign custom permission sets, click the icons in the Shift Planner and Workplace Manager columns.



- Shift planners are assigned these permission sets: Workplace Shifts Shift Planner, Workplace Shifts Shift Planner App Settings, FSL Dispatcher Permissions, and FSL Dispatcher License.
- Workplace managers are assigned these permission sets: Workplace Shifts Workplace Manager, Workplace Shifts Workplace Manager App Settings, FSL Dispatcher Permissions, and FSL Dispatcher License.

6. To provide service territory access for shift planners and workplace managers, run the scheduled job that sets up sharing.
   a. Go to **Field Service Settings** > **Sharing** > **Scheduled Jobs**.
   b. Expand the **User Territories** job.
   c. Select all territories.
   d. Click **Save**.
   e. Close and reopen the tab, then click **Run Now** to trigger the job. You can see the scheduled job at **Setup** > **Apex Jobs**.
7. Set up the Optimization scheduled job. After you activate the scheduled job, your shift planners can manually optimize shifts in the Shift Schedules tab. For details, see Set Up and Run Optimization Jobs.
8. Add the Shifts at a Glance component to your custom Command Center home page. For more information about the home page, see Clone the Command Center on page 17.
   a. From the App Launcher, select the Command Center. To access the Lightning App Builder, click the gear icon and select **Edit Page**.
   b. Under **Custom**, find Command Center - Shifts Quicklook and drag the component onto the page.
   c. Save your changes.

   Tip: To view data in the Command Center - Shifts Quicklook component, your users need the Workplace Shifts Command Center and Workplace Shifts Command Center App Settings custom permission sets.

Create Employee Logins for the Shift Management App

After you set up Shift Management, create logins for your employees so that they can manage their availability and workplace shifts in the Salesforce mobile app.

1. From Setup, in the Quick Find box enter `Users` and click **Users**.
2. Select your active employees.
3. Click **Reset Password**.
   Your users receive an email notification to log in and verify their account. They can use the Salesforce mobile or desktop app to verify the shift management account.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To set up Shift Management:
- Workplace Command Center permission set license

  Edit on employees

Update an Existing Shift Management Org

Shift Management for Work.com is a managed package. Existing Work.com orgs automatically receive new versions of the package, and most new features and changes are already enabled. But some features must be configured after an upgrade to keep the org updated.

Note: We announce updates to the package in the Work.com Release Notes. Keep an eye out for updates and changes there. If you have questions, post them to the Work.com Trailblazer Community group.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To set up Shift Management:
- Workplace Command Center permission set license

  Edit on employees

Upgrade to Version 5

Version 5 introduces an alternative mobile app where employees can find and book shifts at locations other than their assigned workplace. For example, if you have multiple offices in one metro area, your team can book shifts at the location that works best. Or, an employee traveling for critical business—or who relocated—can come in to a local office. Managed package version 5.1 was released in sandbox orgs on December 3, 2020 and will be generally available in production orgs on December 10, 2020. After the upgrade, follow these steps.

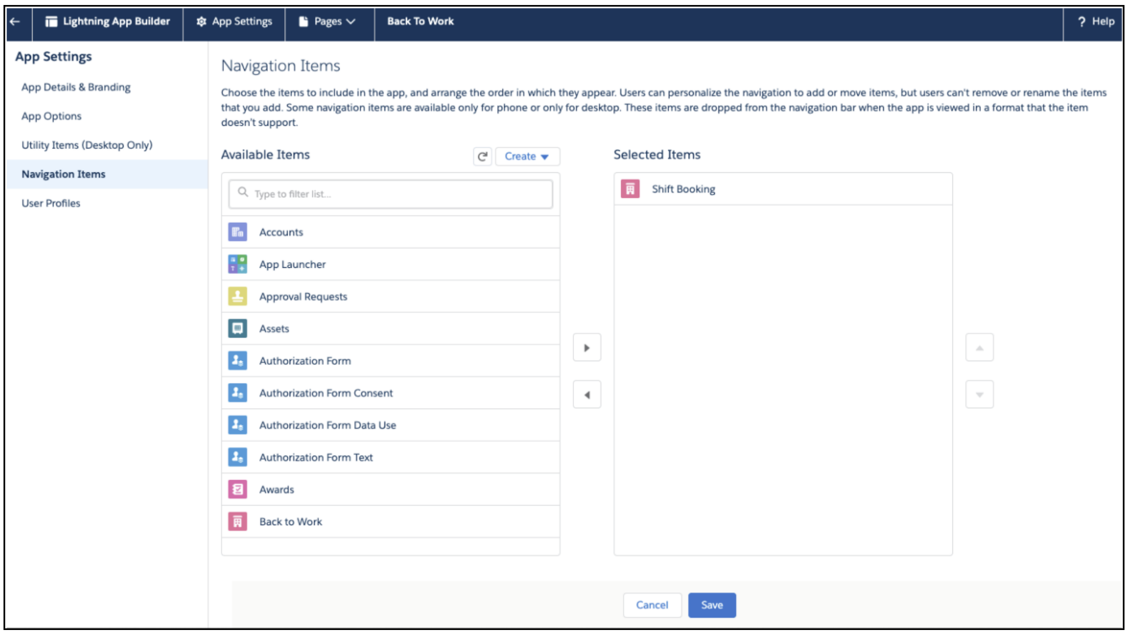
Important: In Work.com orgs created before version 5, the Back to Work tab is removed from the Back to Work app after the upgrade. Your employees won't have access to the mobile app until you configure the app's navigation. You can select the previously available Back to Work tab or the new Shift Booking tab for self-service scheduling at open locations.

Update permission sets

1. From the App Launcher, select **Shift Management Setup**.
2. Under Add Permission Sets, click **Update**.

Configure mobile app navigation

1. From Setup, enter `app` in the Quick Find box and select **App Manager**.
2. Find and edit the Back to Work app.
3. Click **Navigation Items**.
4. Add one of these tabs to the Selected Items:
   - To let employees schedule shifts at any available workplace, select the **Shift Booking** tab.
   - To schedule employee shifts at their assigned workplace, select the **Back to Work** tab.



5. **Save** your changes.

Set up multi-location shift booking

To complete the switch to multi-location booking, assign the new Lightning record page as the org default.

1. Go to **Setup** > **Object Manager** and click **Facility Plan**.
2. Click **Lightning Record Pages**.
3. Open the Shift Booking page, then click **View**.
4. To assign the page as the org default, click **Activation...**
5. Set the page as the org default. Make sure to include the Phone form factor.
6. **Save** your changes.

Employees can view and manage previously confirmed shifts in the new mobile app.

Manage Workplaces, Shifts, and Schedules

Set up your location occupancies. Create facility plans to reduce workplace occupancy and stagger arrivals. Then let employees and shift planners work out a shift schedule.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

Plan for Reduced Occupancy
Define the maximum occupancy for each of your locations. Workplace managers and team planners take it from there to create weekly plans and schedule employees.

Create Facility Plans
Manage plans for your buildings and facilities as the COVID-19 crisis evolves. Using the guidance from your local government and health departments, define the workplace's reduced density requirements. Use the arrival calculator to get a recommendation for how many people can safely come to the building at the same time.

Create Open Shifts and Notify Your Team
Your plan is in place and your employees are ready to go. Create a set of open shifts to start the scheduling process. Send a mobile app notification to find out which dates and times work for your people.

Schedule Shifts for Your Team
Review and confirm the schedule for your team. Use the Shift Schedules tab to see available employees and match them to open occupancy at your location.

Plan for Reduced Occupancy

Define the maximum occupancy for each of your locations. Workplace managers and team planners take it from there to create weekly plans and schedule employees.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

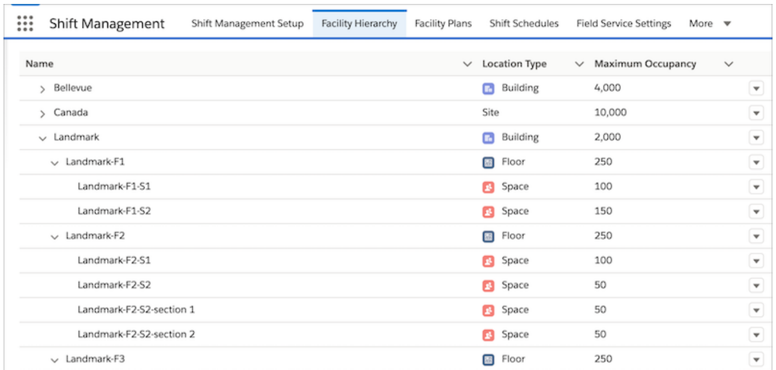
USER PERMISSIONS

To schedule and assign shifts:
- Workplace Shifts Shift Planner custom permission set

To manage facility plans and service territory locations:
- Workplace Shifts Workplace Manager custom permission set

To create open shifts, you set the occupancy for each level in the facility hierarchy.

1. From the app launcher, select **Facility Hierarchy**.
2. Set the maximum occupancy for each service territory.
   a. To set the maximum occupancy for the top-level locations in your hierarchy, click the dropdown and then click **Edit Occupancy**.
   b. To set the occupancy for sublocations, expand the entry for the location that you manage. Then, click the dropdown and click **Edit Occupancy**.
3. Enter a value for the Maximum Occupancy.
4. Save your changes.
5. Repeat steps 2–4 for each location in the hierarchy.



Name	Location Type	Maximum Occupancy
Bellevue	Building	4,000
Canada	Site	10,000
Landmark	Building	2,000
Landmark-F1	Floor	250
Landmark-F1-S1	Space	100
Landmark-F1-S2	Space	150
Landmark-F2	Floor	250
Landmark-F2-S1	Space	100
Landmark-F2-S2	Space	50
Landmark-F2-S2-section 1	Space	50
Landmark-F2-S2-section 2	Space	50
Landmark-F3	Floor	250

Note:

- If you add new service territories in the Facility Hierarchy component, the system doesn't create a matching Location record.
- To validate occupancy limits, use the Verify Occupancy action. This action checks whether the sum of the maximum occupancy in each sublocation adds up to the maximum occupancy for the parent location.
- Workplace managers can edit the facility hierarchy and set maximum occupancies in the Facility Hierarchy tab. Admins can edit the facility hierarchy in the Shift Management Setup tab.

Create Facility Plans

Manage plans for your buildings and facilities as the COVID-19 crisis evolves. Using the guidance from your local government and health departments, define the workplace's reduced density requirements. Use the arrival calculator to get a recommendation for how many people can safely come to the building at the same time.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To schedule and assign shifts:

- Workplace Shifts Shift Planner custom permission set

To manage facility plans and service territory locations:

- Workplace Shifts Workplace Manager custom permission set

Add Facility Plans

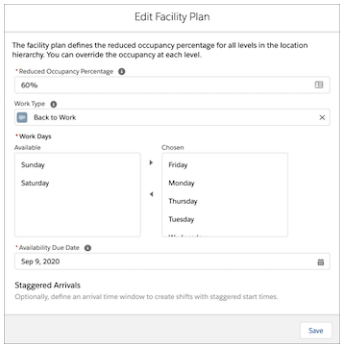
Facility plans apply to a locations and its sublocations. Because the situation can change rapidly, plans cover one week. Define the reduced occupancy in the facility plan to set the planned occupancy in each sublocation. Create facility plans ahead of time so that your employees have adequate time to confirm the schedule.

1. From the App Launcher, select **Facility Plans**.
2. Select a location and a date. When you choose a date, we show the plan for the week that the day falls within.
3. Click **Show Facility Plan**.
4. Click **Add Facility Plan**.
   a. Select managed or self-service scheduling. Click **Next**.
   b. For the Reduced Occupancy Percentage, enter the percentage of the location's maximum occupancy that your workplace plan allows.
   c. Optionally, select a work type. If you use a custom work type, we recommend using a default shift length between five and eight hours. You can't choose a work type that creates service appointments automatically. Make sure that custom work types don't have **Auto-Create Service Appointment** selected.
   d. Select the work days at this location.
   e. Managed scheduling only: Set the availability due date. Employees can edit their availability until the response date. After the due date, they can review and confirm any assigned shifts.
   f. Optionally, fill out the Staggered Arrivals fields.

      Define a time window and occupancy per interval that's used to calculate staggered shifts. If your location has entrances, lobbies, or elevators that are likely to get crowded, staggered arrivals help you manage the flow of employees.

      Tip: For self-service scheduling plans, the staggering process runs when you generate shifts. We add arrival start and end times to the shifts, stored as Service Appointments. For managed scheduling plans, a scheduled job runs each day to stagger the confirmed shifts for the following day.

5. **Save** the facility plan.



Calculate Arrival Intervals

Calculate a recommended occupancy per arrival interval using the Arrival Calculator.

1. Enter the number of elevators at the location.
2. Choose the approximate size of the average elevator.
3. Set the average round-trip time for the elevators.
4. Click **Calculate**. Make a note of the recommended value to use in the facility plan.
5. To start the calculation over, click **Change Inputs**.

Review Existing Plans

To see a list of recent facility plans:

- Click **Browse All Plans**.
- Select a plan, then click **Show This Plan**.

To open a specific plan:

- Select a location and a date.
- Click **Show Facility Plan**.

To open the plan, click **Edit Facility Plan** or **View Facility Plan**.

Tip: You can't edit plans after shifts have been generated.

SEE ALSO:

How Does Shift Scheduling Work?

Create Open Shifts and Notify Your Team

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To manage facility plans and service territory locations:

- Workplace Shifts Workplace Manager custom permission set

Your plan is in place and your employees are ready to go. Create a set of open shifts to start the scheduling process. Send a mobile app notification to find out which dates and times work for your people.

Note: To send shift notifications to employees, notifications for the Salesforce mobile app must be enabled.

Self-service scheduling

Facility plans that use self-service scheduling let employees choose from available shifts and confirm what they want. Depending on your mobile app configuration, employees can reserve shifts at any open facility or at their assigned workplace only.

Review the plan, then generate open shifts. When you generate shifts, the system creates a set of service appointments. The service appointments represent open shifts based on the planned occupancy. For example, if the planned occupancy in a workspace on the 10th floor of the Denver office is 15, then 15 service appointments are created for each day in the facility plan. Like employee shifts, service appointments are created only at the lowest-level service territories in your location hierarchy.

To generate shifts:

1. From the App Launcher, select **Facility Plans**.
2. Open the plan for which you want to create shifts.
3. Click **Generate Shifts**. If you set an arrival window, we create shifts with staggered arrival start and end times. You receive an email when the process is complete.

Then, let your team know that shifts are available. Send a mobile app notification to all employees with a primary service territory membership within the facility.

When you send the notification, the system creates shifts with the status Tentative for the employees assigned to service territories that fall within the facility. Then, only those employees with the wellness status of Available to Work receive a notification. Employees search for shifts by arrival times in the mobile app. Only those employees with the status of Available to Work receive a notification.

To send the mobile app notification:

1. From the App Launcher, select **Facility Plans**.
2. Open the plan for which you want to send availability requests.
3. Click **Notify Employees**.

Managed scheduling

When you use managed scheduling, shift planners assign service appointments and confirm the schedule with employees. Here's how it works.

Review the plan, then invite employees to confirm their availability. When you send requests, the system creates shifts with the status Tentative for all those assigned to service territories that fall within the facility. Only employees with the status of Available to Work receive a notification.

Employees can respond until the availability due date in the facility plan. After the due date, those who didn't respond or weren't available are ineligible for shifts.

To send availability requests:

1. From the App Launcher, select **Facility Plans**.
2. Open the plan for which you want to send availability requests.
3. Click **Send Requests**.

Then, generate open shifts. When you generate shifts, the system creates a set of service appointments. The service appointments represent open shifts based on the planned occupancy. For example, if the planned occupancy in a workspace on the 10th floor of the Denver office is 15, then 15 service appointments are created for each day in the facility plan. Like employee shifts, service appointments are created only at the lowest-level service territories in your location hierarchy.

To generate shifts:

1. From the App Launcher, select **Facility Plans**.
2. Open the plan for which you want to create shifts.
3. Click **Generate Shifts**.
   a. If you set an arrival window, enter the Calculation Start Time. Employees receive an updated start time when the staggered arrival calculation finishes.
4. To start creating the service appointments, click **Generate Shifts**. You receive an email when the process completes.

Now that the employees are notified and the shifts are created, planners can review the schedule in the Shift Schedules tab.

SEE ALSO:

How Does Shift Scheduling Work?

Schedule Shifts for Your Team

Review and confirm the schedule for your team. Use the Shift Schedules tab to see available employees and match them to open occupancy at your location.

Tip: If your workplace uses self-service scheduling, employees find and reserve their own shifts. This process applies to managed scheduling.

- From App Launcher, select **Shift Schedules**.

Open shifts, also called service appointments, are shown on the left. The service appointments represent open shifts based on the planned occupancy. For example, if the planned occupancy in a workspace on the 10th floor of the Denver office is 15, then 15 service appointments are created for each day in the facility plan.

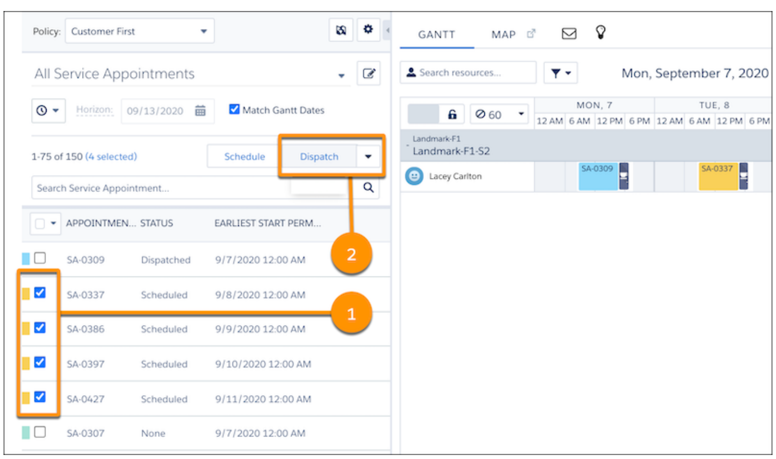
Available employees, called service resources in the Gantt, appear as rows in the chart. You can see which employees are available by looking at the shifts on the schedule. Tentative shifts are assigned to an employee, and days they say they're available are marked Confirmed.

If the schedule optimization job is turned on, a tentative schedule is automatically created. You can fine-tune the schedule and check on shifts or employees that weren't matched by the scheduling engine. You can also choose to run scheduling optimization manually.

- To automatically match employees to open time slots, click **Optimize**.
- To assign a shift to an employee, drag the service appointment onto the Gantt.
- To reassign a shift to someone else, you can drag an appointment between rows.

Finalize the Schedule

To let employees know about the shift schedule, dispatch the service appointments. Shifts that you assign to employees are dispatched hourly by a scheduled job. Another way to dispatch appointments is to select them in the list (1) and then click **Dispatch** (2).



When shifts are dispatched, employees receive a mobile app notification that they have shifts to confirm. When an employee rejects a shift, the status is reflected in the Gantt.

An employee's wellness status determines whether they can use the shift management app and accept shifts. When the status is Available to Work, employees can use the app and accept shifts. If the status changes to unavailable or unknown, previously accepted shifts are

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

USER PERMISSIONS

To schedule and assign shifts:

- Workplace Shifts Shift Planner custom permission set

To manage facility plans and service territory locations:

- Workplace Shifts Workplace Manager custom permission set canceled. The system creates resource absences for one months to mark the schedule. If the wellness status changes to unavailable on the same day as a previously scheduled shift, the shift isn't canceled. When a previously unavailable employee becomes available for work, the system deletes the service resource absences and employees can accept shifts.

SEE ALSO:

- Work in the Dispatcher Console Gantt
- How Does Shift Scheduling Work?

Use the Shift Management Mobile App

Use the mobile app to get your workplace shift schedule. Find shifts, review your schedule, and view your on-site arrival passes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

Log in to the Shift Management Mobile App

The Salesforce mobile app is where you confirm your workplace shifts. You get a new username to log in, and your Salesforce admin sets up your account. Be sure to log in when you receive an email about your new account.

Schedule Shifts in the Mobile App

Let's get back to the workplace! Use the Salesforce mobile app to manage your shift schedule. View arrival passes when you come on site.

Log in to the Shift Management Mobile App

The Salesforce mobile app is where you confirm your workplace shifts. You get a new username to log in, and your Salesforce admin sets up your account. Be sure to log in when you receive an email about your new account.

EDITIONS

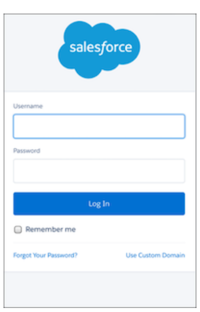
Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

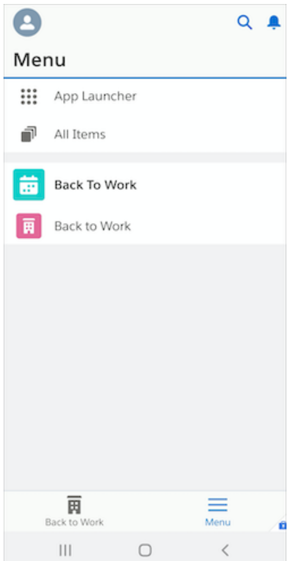
To log in to the Shift Management mobile app:

1. Download the Salesforce mobile app if it’s not already installed.
   - App Store
   - Google Play
2. When you receive an email with your new login, follow the prompts to verify your account.
3. In the Salesforce app, tap **Use Custom Domain** and enter `https://`***`myDomain`***`.lightning.force.com`. Then, log in with your username and password.



To access the shift management app:

1. Tap the menu icon and open the app launcher .
2. Open the Back to Work app. By default, it's called Back to Work, but your admin can customize the app name.



3. To open the home page, tab the app name. Then tap **Back to Work**.

Schedule Shifts in the Mobile App

Let's get back to the workplace! Use the Salesforce mobile app to manage your shift schedule. View arrival passes when you come on site.

Tip: The mobile app can work differently depending on the settings your admin chooses.

EDITIONS

Available in: Lightning Experience

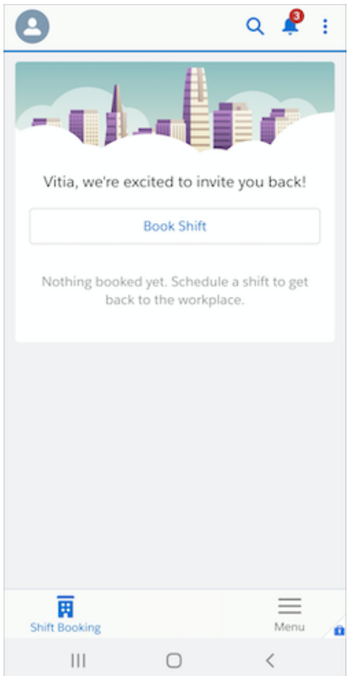
Available in: **Enterprise** and **Unlimited** Editions

Shift Management is available as an add-on license with Work.com and Workplace Command Center.

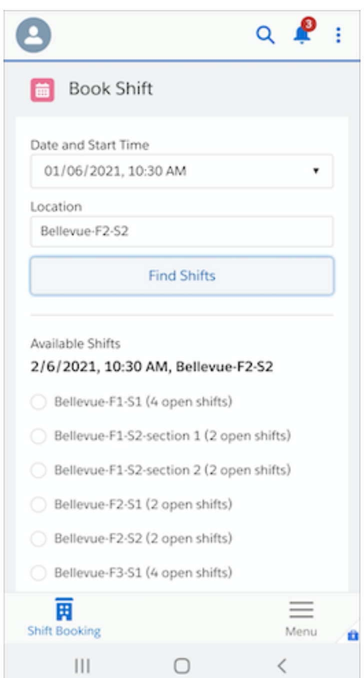
Book shifts

Depending on your workplace plan, you can find and book shifts directly.

1. To start, tap **Book Shift**.



2. Select your preferred time and place, then tap **Find Shifts**.
3. Select a shift, then tap **Book Shift**.
4. Repeat these steps for each day that you want to come to the workplace.

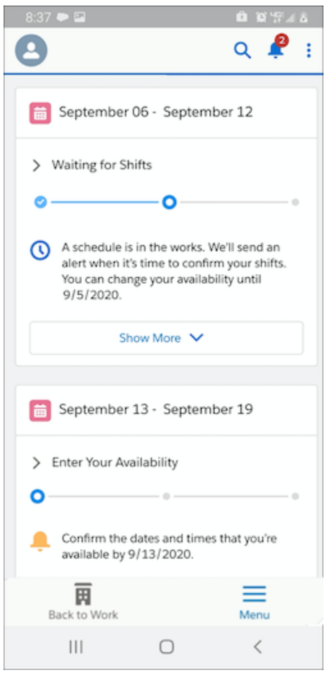


If the list of shifts is empty, try changing your preferred time. To avoid crowding at entrances, your workplace manager can choose to stagger arrival times. When arrival times are staggered, some shifts have a specific arrival window and others start whenever you like.

When you search for shifts with arrival time windows, your results list shifts that start during your preferred time. For example, if you enter 9:30 AM, you find shifts that start between 9:15—9:30 and 9:30—9:45. If the arrival window is 7:00—10:00 AM and you search for 11:00 AM, your results show any shifts without arrival start and end times.

Confirm availability and shifts

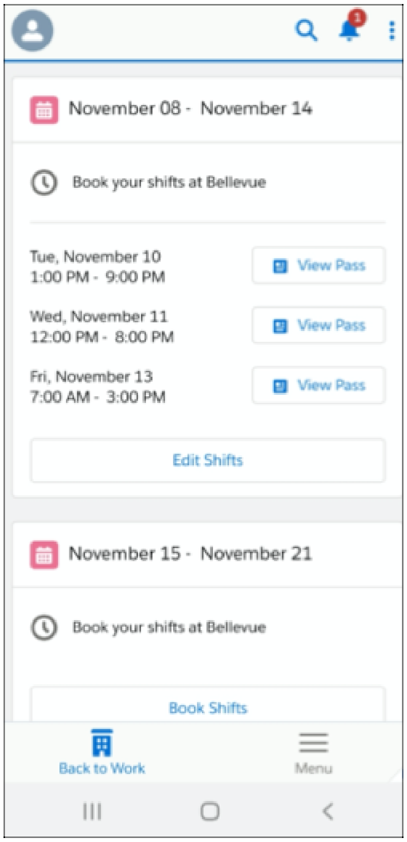
If your workplace manager chooses managed scheduling, the app works differently. You receive a notification when it's time to enter your availability. You can update your responses until the due date. After the due date, you can view your tentative schedule and accept or decline shifts.



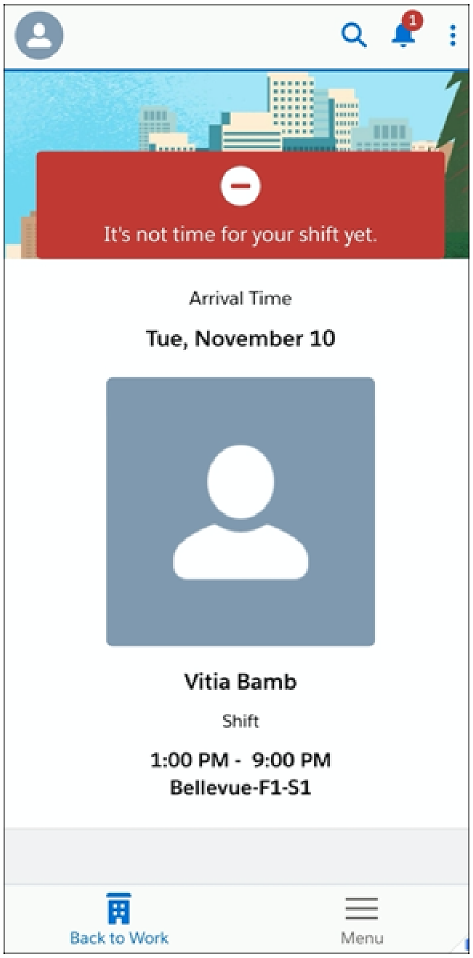
You receive a notification when you have shifts to review and confirm. Accept your shifts promptly so that your workplace planner can finalize the schedule.

View arrival passes

When it's time to arrive on-site, open the arrival pass to confirm your shift and start time.



To open the pass, tap the icon or **View Pass** button.



Workplace Strategy Planner

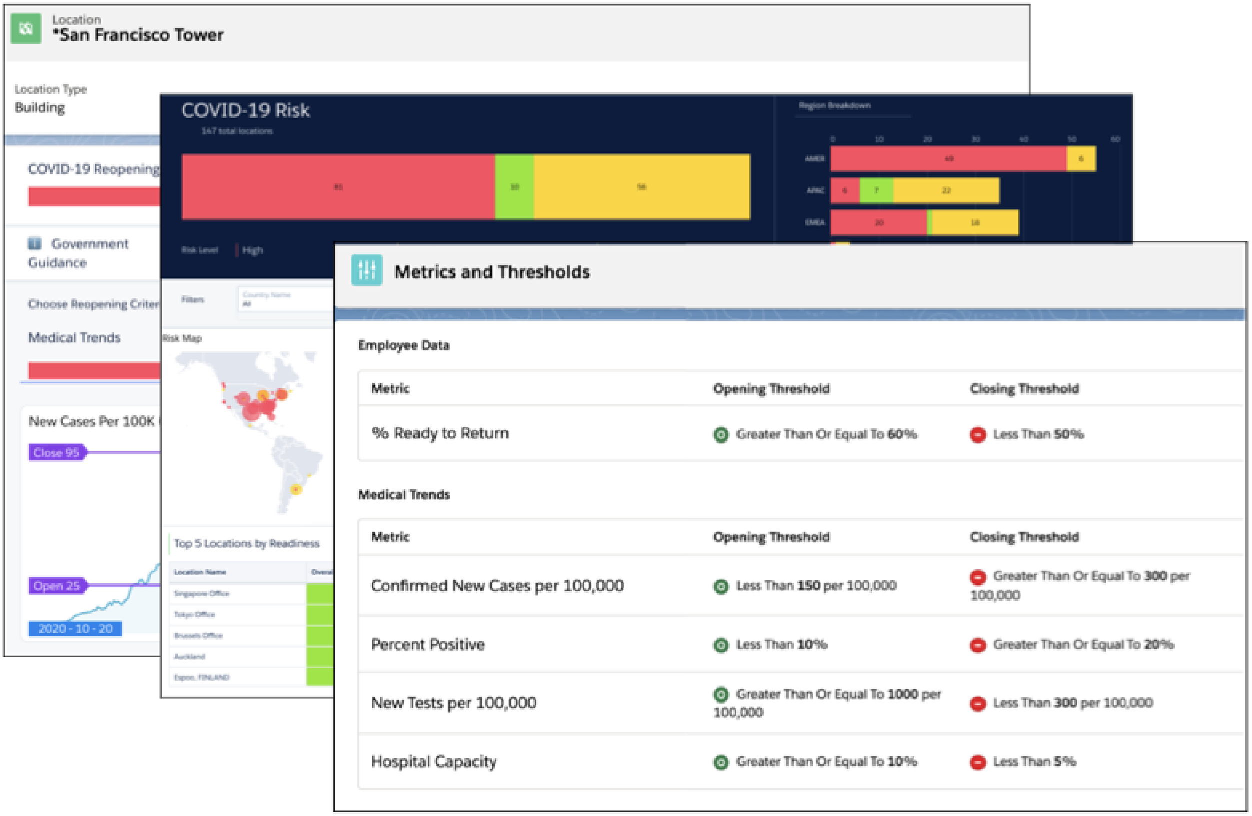
Use Workplace Strategy Planner with Workplace Command Center to help you decide when to open or close workplace locations. With Workplace Strategy Planner, add business priorities, operating guidelines, and COVID-19 data to your Work.com org. Set thresholds on metrics to evaluate the risk level at each workplace location. Use dashboards to visualize all the data in one place and to help guide operating decisions.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

Strategy Planner requires a Workplace Command Center and a Tableau CRM add-on license.



Overview of Workplace Strategy Planner

Workplace Strategy Planner is an optional Tableau CRM app delivered as a managed package available to Work.com orgs that have already installed and configured Workplace Command Center. After Strategy Planner is configured, Workplace Admins, Workplace Operations Managers, and business leaders can work together as a team to set workplace opening and closing thresholds and evaluate the operating risks during the COVID-19 crisis.

Components in Workplace Strategy Planner

Workplace Strategy Planner uses Workplace Command Center, Wellness Check, Tableau CRM, and COVID-19 public data. Before you install Workplace Strategy Planner, learn how these components work together.

Workplace Strategy Planner Considerations

Use Workplace Strategy Planner default settings and values as an example for your own settings and analysis. Customize the app to meet your unique business priorities and the conditions at each workplace location.

Install Strategy Planner

Enable Tableau CRM in your Work.com org and install the Workplace Strategy Planner managed package. Then assign licenses and permissions to yourself, Workplace Operations Managers, and any additional Workplace Admins that need to access Strategy Planner.

Create the COVID-19 Risk App and Dashboards

Create the COVID-19 Risk app in Strategy Planner and run dataflows to populate the app with data. Add the Analytics dashboards to the Strategy Planner home and location records so users can access and edit data.

Organize Your Data and Team

After Strategy Planner and the COVID-19 Risk app and dashboards are installed and configured, you're ready to confirm, edit, and add data. Some data is stored in Workplace Command Center and managed by the Workplace Admin. Other data is stored in Strategy Planner and should be added and managed by Workplace Operations Managers.

Evaluate Opening and Closing Thresholds for Workplace Locations

Use Workplace Strategy Planner to help make operating decisions during the COVID-19 crisis. Strategy Planner brings together metrics on medical trends, government guidance, business priorities, and employee sentiment into your Work.com org. Set opening and closing thresholds for these metrics and evaluate the conditions at each workplace location in a single dashboard.

Overview of Workplace Strategy Planner

Workplace Strategy Planner is an optional Tableau CRM app delivered as a managed package available to Work.com orgs that have already installed and configured Workplace Command Center. After Strategy Planner is configured, Workplace Admins, Workplace Operations Managers, and business leaders can work together as a team to set workplace opening and closing thresholds and evaluate the operating risks during the COVID-19 crisis.

Note: Workplace Strategy Planner provides access to sensitive data regarding employee health and workplace safety, and requires additional Salesforce licenses and permissions. For these reasons, we recommend limiting Workplace Strategy Planner access to Workplace Admins and Workplace Operations Managers that are responsible for the operating and safety procedures at your workplace locations.

To access Workplace Strategy Planner, you must be assigned a Workplace Command Center license, either the Workplace Admin Access or Workplace Operations Access permission set group, a Tableau CRM Plus or Growth license, and Strategy Planner permissions. Talk to your account executive for more information on Tableau CRM licenses and what might be best for your org.

We recommend the following roles:

- A Workplace Admin installs Workplace Strategy Planner. After Strategy Planner is installed, the dashboards require additional customization and data input.
- Workplace Operations Managers maintain the dashboards, but admins and operations team members work together to understand how Strategy Planner components interact in the app.
- The operations team consults or collaborates with executives or business leaders when gathering data and deciding on threshold values for the dashboard.

When the setup and configuration is complete, Workplace Operations Managers can use the app to evaluate the risk of opening each location, based on your business priorities, government restrictions, and current COVID-19 trends.

SEE ALSO:

Meet the Workplace Command Center Personas

Components in Workplace Strategy Planner

Workplace Strategy Planner uses Workplace Command Center, Wellness Check, Tableau CRM, and COVID-19 public data. Before you install Workplace Strategy Planner, learn how these components work together.

Workplace Command Center

Workplace Strategy Planner requires Workplace Command Center version 5.3 or later in a Work.com org. The Strategy Planner app relies on Command Center location, address, and employee data to connect and synthesize data from all other components used in the app.

Wellness Check

Wellness Check is recommended but not required for Workplace Strategy Planner. By default, Workplace Strategy Planner uses the employee wellness survey results to calculate the percentage of employees that are ready to return to the workplace. This data appears automatically in Strategy Planner if your org uses the recommended wellness check survey mappings.

COVID-19 Public Data Sources

The Workplace Strategy Planner managed package includes a custom, pre-configured connector to a Snowflake Data Warehouse that allows your org to incorporate public health data on COVID-19 to your org. This connector is a Salesforce created, deployed, and managed technology.

The COVID-19 public data used in Workplace Strategy Planner is collected and maintained by organizations outside of Salesforce. The public data set may include data from Johns Hopkins, Oxford University, the New York Times, and the COVID Tracking Project. This data is used to populate the Workplace Strategy Planner medical trends metrics, including the percentage of new COVID-19 cases and number of new tests performed. Salesforce doesn't commit to supporting a specific data source. Organizations providing data to the COVID-19 public data set may change. Salesforce doesn't assert and can't verify the accuracy or availability of any data provided through the Snowflake Data Warehouse. The COVID-19 public data is automatically updated daily.

We recommend using the pre-configured Snowflake data connector. Although it's possible to customize the data connector, changes and customization aren't supported by Salesforce. Customization made to the update frequency can cause connection and latency issues.

Throughout the Workplace Strategy Planner documentation, the Snowflake Data Warehouse is often referred to as the COVID-19 public data source.

Tableau CRM

Tableau CRM Analytics Studio is a critical component of Workplace Strategy Planner. The Workplace Strategy Planner managed package includes access to an Tableau CRM app template. After the Tableau CRM app is created and configured, the app synthesizes data in your org with the COVID-19 public data, and displays the data in an intuitive and interactive dashboard.

SEE ALSO:

Workplace Command Center

Explore Data and Take Action with Tableau CRM

Workplace Strategy Planner Considerations

Use Workplace Strategy Planner default settings and values as an example for your own settings and analysis. Customize the app to meet your unique business priorities and the conditions at each workplace location.

Workplace Strategy Planner was created with guidance from the Salesforce Advisory Board, composed of medical, public health, and business leaders. The board was consulted at each stage of the app development process, including in the selection and approval of the default data and metric threshold values. The app defaults, however, are intended only as a demonstration. Use the app defaults as an illustration of a potential starting point for your own configuration. Carefully consider the unique needs of your organization as you decide how to customize the app, settings, data, and metric threshold values.

When you're ready to customize Workplace Strategy Planner, consider the impact your decisions can have on your organization, employees, and the communities surrounding your workplace locations. Prioritize the health and safety of everyone that is employed at, visits, or may interact with people that have been at your workplace locations. Consult experts and use reliable sources when customizing data and threshold values. Consider discussing your decisions with legal counsel, if possible.

Install Strategy Planner

Enable Tableau CRM in your Work.com org and install the Workplace Strategy Planner managed package. Then assign licenses and permissions to yourself, Workplace Operations Managers, and any additional Workplace Admins that need to access Strategy Planner.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

Strategy Planner requires a Workplace Command Center and a Tableau CRM add-on license.

USER PERMISSIONS

To install Workspace Strategy Planner and assign permissions:

- Workplace Admin Access permission set group

1. Enable Tableau CRM

   Enable Tableau CRM in your org. Set a preference to open records in new browser tabs to make it easy for Workplace Strategy Planner users to toggle between the dashboard and location records.
2. Install the Strategy Planner Package

   Use the Work.com installer to add the Workplace Strategy Planner managed package. After installing the package, return here to complete the required post-installation configuration.
3. Assign Licenses and Permissions for Workplace Strategy Planner

   Assign yourself a Tableau CRM license. Assign a Tableau CRM license and the Strategy Planner Access permission set to all users and any additional admins that need to access the app.
4. Verify Workplace Strategy Planner Installation

   See what's customized in your org when installing the Workplace Strategy Planner managed package.

Enable Tableau CRM

Enable Tableau CRM in your org. Set a preference to open records in new browser tabs to make it easy for Workplace Strategy Planner users to toggle between the dashboard and location records.

1. From Setup, enter `Getting Started` in the Quick Find box, and then select **Getting Started** under Analytics.
2. Click **Enable Tableau CRM**.
3. Enter `Settings` in the Quick Find box, and then select **Settings** under Analytics.
4. Select **Open Salesforce records in new browser tabs**.
5. Click **Save**.

Install the Strategy Planner Package

Use the Work.com installer to add the Workplace Strategy Planner managed package. After installing the package, return here to complete the required post-installation configuration.

Note: Before installing this package, confirm that these Salesforce installer IP addresses aren't within any restricted ranges, or add them to an allowlist:

- 18.214.2.206
- 3.89.46.237
- 52.201.65.75
- 52.2.53.142

You can remove these IP addresses from your allowlist after installation.

1. Navigate to this URL in your browser: https://install.work.com/
2. Click **Operations and Safety** then **Workplace Strategy Planner**.

3. Click **Install and Configure Workplace Strategy Planner**.
4. Click **Log In to Start Pre-Install Validation**.
5. Select your org type. Enter your Salesforce username and password.
6. Click **Allow** to run the pre-installation validation.
7. In the Connected to Salesforce box, confirm that you're logged in to the correct org. If the pre-install validation fails, use the error messages in the installer to troubleshoot and complete the pre-installation requirements. When you're ready, return to the installer URL and try again.
8. Review the list of customizations the installer makes in your org.
9. Click **Install**. Click **Confirm** to accept the terms of use.

After a successful installation, continue with the manual configuration steps. Assign users licenses and permissions, create an app from our template, setup dashboards, and confirm or add location data in your org.

Assign Licenses and Permissions for Workplace Strategy Planner

Assign yourself a Tableau CRM license. Assign a Tableau CRM license and the Strategy Planner Access permission set to all users and any additional admins that need to access the app.

All users and admins, including the admin who installed the Strategy Planner managed package, must be manually assigned a Tableau CRM Growth or Plus license.

The Workplace Strategy Planner managed package includes the Strategy Planner Access permission set, which provides access to the app, features, settings, and custom objects. This permission set is required to access Strategy Planner. The admin who installed Workplace Strategy Planner is automatically assigned the Strategy Planner Access permission set. All other users and additional admins must be assigned this permission set.

To assign a Tableau CRM license:

1. From the App Launcher, search for and select **Strategy Planner.**
2. From Setup, search for and select **Users**.
3. Click **Edit** next to a username.
4. In the Permission Set License Assignments section, click **Edit Assignments**.
5. Find and select either the Tableau CRM Plus or Tableau CRM Growth license.
6. Click **Save**.

To assign a Strategy Planner license:

1. Click **Edit** next to a username.
2. In the Permission Set Assignments section, click **Edit Assignments**.
3. In Available Permission Sets, select **Strategy Planner Access**.
4. Click **Add** then **Save**.

We recommend restricting Workplace Strategy Planner access only to Workplace Operation Managers that oversee COVID-19 procedures or that monitor health and safety at one or more workplace locations.

Important: There's only one permission set for Workplace Strategy Planner. Workplace Admins and Operations Managers that are assigned this permission set have the same level of access to Strategy Planner settings. Because Workplace Strategy Planner can include sensitive data, we recommend restricting access to only admins and users who truly need to know.

Verify Workplace Strategy Planner Installation

See what's customized in your org when installing the Workplace Strategy Planner managed package.

Installation step Name	What it Does
Install the Workplace Strategy Planner Managed Package	Installs the Strategy Planner app, custom objects, triggers, the Strategy Planner Access permission set, and allows for a secure data connection to the COVID-19 public data source. Provides access to Strategy Planner app criteria, metrics, and default values for opening and closing metric thresholds.
Assign the Strategy Planner Access Permission Set	Assigns the Strategy Planner Access permission set to the admin completing the package installation.
Create the Strategy Planner Location Data Permission Set	Creates a permission set granting access to Location Assessment. Admins manually assign this permission set to users who require access to Location Assessment.
Assign Permission Sets to the Integration User	Assigns the Strategy Planner Access and Tableau CRM Admin permission sets to the Integration User. Assigns a Tableau CRM license via the Tableau CRM Admin permission set.
Create the Location Assessment Details List View	Creates a list view for the Location Assessment custom object. Strategy Planner users can then access and edit data used to evaluate the risk level at each workplace location.
Create the Connection to the COVID-19 Public Data Source	Connects the org to the COVID-19 public data source using the custom, preconfigured Salesforce data connector.

Note: The Work.com installer assigns the Integration User either a Tableau CRM Growth or Tableau Plus license, based on what is available in your org.

SEE ALSO:

Workplace Command Center Permission Set Groups

Create the COVID-19 Risk App and Dashboards

Create the COVID-19 Risk app in Strategy Planner and run dataflows to populate the app with data. Add the Analytics dashboards to the Strategy Planner home and location records so users can access and edit data.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

Strategy Planner requires a Workplace Command Center and a Tableau CRM add-on license.

USER PERMISSIONS

To access and edit Workspace Strategy Planner:

- Strategy Planner Access permission set

  Workplace Admin Access or Workplace Operations Access permission set group

1. Create a New COVID-19 Risk App from a Template
   Use a Tableau CRM app template to create the COVID-19 Risk app in Workplace Strategy Planner.
2. Schedule Dataflow Updates
   Schedule the Strategy Planner dataflows to update twice a day to make sure the dashboards populate with current data.
3. Add the COVID-19 Dashboard to Strategy Planner Home
   After creating the COVID-19 Risk app in Analytics Studio, return to Strategy Planner. Create a home page and add the COVID-19 Risk dashboard to it.
4. Add the COVID-19 Risk Component to Location Records
   When you add the COVID-19 Risk component to the location record page layout, users see a small dashboard on each location record, showing data for that workplace.
5. Share the COVID-19 Risk App
   To give Strategy Planner users access to the dashboards, share the COVID-19 Risk app.

Create a New COVID-19 Risk App from a Template

Use a Tableau CRM app template to create the COVID-19 Risk app in Workplace Strategy Planner.

Important: Before creating the COVID-19 Risk app, confirm that your employee and location data in Workplace Command Center is populated following Workplace Strategy Planner data requirements on page 305. To create the COVID-19 Risk app, at least one employee record must be associated with a location record that includes values for fields required by Strategy Planner.

1. From the App Launcher, search for and select **Analytics Studio**.
2. Click **Create** and select **App**.
3. Search for and select the app template COVID-19 Risk.
4. Click **Continue** and then click **Continue** again.
5. Name your app *`COVID-19 Risk App`*.
6. Click **Create**.

The app creation status page appears. The page updates and you receive an email when the process completes.

If the app creation process fails or you receive an error, reconfigure the app to rerun the process.

1. From Analytics Studio, find and click the name of the failing app.
2. On the creation status page, click **Cancel**.
3. Click **Continue**.
4. Click **Reconfigure app**.
5. Select **It’s OK to overwrite current app and any customizations.** Click **Continue**.
6. Click **Ok**.

If you continue to receive errors during the app creation process or it continues to fail, contact Salesforce Customer Support.

Note: The COVID-19 Risk app template is maintained and managed by Salesforce. The template can be updated, but you must manually accept and install any updates. Updates may overwrite existing customizations. Watch for notifications in your org and the Work.com release notes for announcements about updates to Workplace Strategy Planner and the app template.

SEE ALSO:

Deploy Tableau CRM Prebuilt Apps

Work.com Release Notes

Prepare for Package and Template Updates

Schedule Dataflow Updates

Schedule the Strategy Planner dataflows to update twice a day to make sure the dashboards populate with current data.

1. In Analytics Studio, click **Data Manager**.
2. Click **Connect**.
3. Find the row for WorkDotCom Snowflake Connector. From the dropdown arrow, select **Schedule**.
4. Set the following in the Schedule window:
   a. Schedule by: Hour
   b. Start at: 7:00 AM (America/Los Angeles)
   c. Run every: 2 Hours
   d. Days of the week: Select all
   e. Select: Stop queuing at a specific time
   f. Select: 9:00 AM (America/Los Angeles)
5. Click **Save**.
6. Repeat the process to set the same schedule for SFDC_LOCAL.
7. Click **Dataflows & Recipes**.
8. From the COVID-19 Risk App - COVID-19 Risk row, use the dropdown to select **Schedule**.
9. Click **Time-based**. Set the following in the Schedule window:
   a. Schedule by: Hour
   b. Start at: 7:15 AM (America/Los Angeles)
   c. Run every: 2 Hours
   d. Days of the week: Select all
   e. Select: Stop queuing at a specific time
   f. Select: 9:15 AM (America/Los Angeles)
10. Click **Save**.
11. From the COVID-19 Risk App Covid Merged Dataflow for Locations, use the dropdown to select **Schedule**.
12. Click **Time-based**. Set the same Time-based schedule that was set for COVID-19 Risk App - COVID-19 Risk.
13. Click **Save.**

The WorkDotCom Snowflake Connector updates must follow our schedule (7:00 AM and 9:00 AM PST). The Snowflake Data Warehouse sources are only updated twice a day. More frequent updates to WorkDotCom Snowflake Connector aren't supported. Scheduling updates more frequently doesn't refresh the data in your org and may cause performance issues.

You can, however, customize the SFDC_LOCAL schedule to update as often as data in your org changes or is refreshed. If data in your org is updated frequently, change your schedule to sync more frequently.

Manually Update Data in Strategy Planner

If you update data in your org, like add or edit location data, you can sync the updates to Strategy Planner manually. This updates Strategy Planner with your latest changes instantly, rather than waiting for the next scheduled update. You can sync individual objects or all objects. You can also manually update if you receive an email notification that the data sync failed.

1. In the Analytics Studio Data Manager, click **Connect**
2. In the SFDC_LOCAL section, click the dropdown arrow in a row for an object.
3. Select **Run Data Sync**. Click **Run Full Sync**.

To update all objects, use the dropdown in the SFDC_LOCAL table header and select **Run Now**.

After you manually sync to update Strategy Planner, run the dataflows to have the dashboard reflect any changes. If you don't run the dataflows manually, the dashboard won't reflect changes until the next scheduled sync.

1. In Analytics Studio Data Manager,click **Dataflows & Recipes**.
2. Click **Dataflows**.
3. Find the row for COVID-19 Risk. From the dropdown arrow, select **Run Now**.
4. Find the row for Covid Merged Dataflow for Location. From the dropdown arrow, select **Run Now**.

Note: You can also manually run the data sync for WorkDotCom Snowflake Connector to update the COVID-19 public data. However, we recommend that you allow the Snowflake Connector to update data following the twice daily update schedule. Manually sync the WorkDotCom Snowflake Connector only when troubleshooting inaccurate medical trends metrics in your dashboard. Contact Salesforce Customer Support if issues persist.

Add the COVID-19 Dashboard to Strategy Planner Home

After creating the COVID-19 Risk app in Analytics Studio, return to Strategy Planner. Create a home page and add the COVID-19 Risk dashboard to it.

1. From Setup, use Quick Find to search for and select **Lightning App Builder**.
2. Click **New**.
3. Select **Home Page** and click **Next**.
4. Enter `Home` for the label. Click **Next**.
5. Select **Three Column Region**. Click **Finish**.
6. From the Components list, find **Tableau CRM Dashboard**. Drag it onto the page.
7. From the Dashboard dropdown, select **Covid-19 Risk: Home**.
8. Update the Height to 1600.
9. Click **Save**.
10. Click **Activate**.
11. Click **Activation** and select **App Default**.
12. Click **Assign to Apps**. Select **Strategy Planner** and click **Next**. Click **Save**.

13. Click **Save**.
14. Return to Setup. Use Quick Find to search for and select **App Manager**.
15. From the dropdown in the row for Strategy Planner, select **Edit**.
16. Click **Navigation Items**.
17. Add **Home** from the list of Available Items to the list of Selected Items.
18. Click **Save**.

Tip: Let your users know that they can reorder the navigation tabs in their accounts using the pencil icon. Suggest that they move the Home tab next to the App Launcher icon for fast access to the COVID-19 Risk dashboard.

Add the COVID-19 Risk Component to Location Records

When you add the COVID-19 Risk component to the location record page layout, users see a small dashboard on each location record, showing data for that workplace.

You add the dashboard component twice to location records. One appears on US location records and one on Non-US location records. Each insert of the component requires different filter logic. After the filters are applied and the components are saved, a dashboard appears and auto-populates on location records.

1. From the App Launcher, search for and select **Strategy Planner**.
2. Navigate to any location record. From Setup, in the Quick Find box, enter `Edit Page`, then select **Edit Page**.
3. From the Components list, find **Tableau CRM Dashboard**. Drag and drop it onto the page beneath the record highlight.
4. Click the component to select it. From Dashboard, select **Covid-19 Risk: US Location**.
5. Update the Height to 600.
6. Under Dashboard Filters, deselect **Show Title** and **Show Header**.
7. Click **Filter String**. Copy and paste this code snippet into the Filter String field:

```
[illegible]
```

8. Under Set Component Visibility, click **+ Add Filter**. Select Filter Type **Record Field** and set the following:
   a. Field: Country
   b. Operator: Equal
   c. Value: USA
9. Under Set Component Visibility, click **+ Add Filter**. Select Filter Type **Record Field** with these settings.
   a. Field: Location Type
   b. Operator: Equal
   c. Value: Building
10. From the Components list, find **Tableau CRM Dashboard**. Drag it onto the page beneath the record highlight.
11. Click the component to select it. From Dashboard, select **Covid-19 Risk: Non-US Location**.
12. Update the Height to 600.
13. Under Dashboard Filters, deselect **Show Title** and **Show Header**.

14. Click **Filter String**. Copy and paste this code snippet into the Filter String field:

```
[illegible]
```

15. Under Set Component Visibility, click **+ Add Filter**. Select Filter Type **Record Field** with these settings.

a. Field: Country

b. Operator: Not Equal

c. Value: USA

16. Under Set Component Visibility, click **+ Add Filter**. Select Filter Type **Record Field** with these settings.

a. Field: Location Type

b. Operator: Equal

c. Value: Building

17. Click **Activation**. Under Org Default, confirm this page is set as the org default.

18. Save your changes.

Verify that you pasted the filter strings correctly and check for these filters and field values for the COVID-19 Risk: US Locations dashboard component.

Dataset	Dataset Field	Operator	Object Field
CovidOxfordData	State.Code	Equals	State
CTRACK_POPULATION_COMBO	PROVINCE_STATE_CODE	Equals	State
ActivityPopAndLocAssess	Pop.Location__c.Name	Equals	Location Name
LocationAssessmentAugment	Location__c.Id	Equals	Location Id
C19_WORK_V1	State.Code	Equals	State
Employee	Location ID	Equals	Location Id

Check for these filters and field values for the COVID-19 Risk: Non-US Locations dashboard component.

Dataset	Dataset Field	Operator	Object Field
CTRACK_POPULATION_COMBO	Pop.CountryLinkName	Equals	Country
CovidOxfordDataO	CountryLinkName	Equals	Country
ActivityPopAndLocAssess	Pop.Location__c.Name	Equals	Location Name
LocationAssessmentAugment	Location__c.Id	Equals	Location Id
C19_WORK_V1	CountryLinkName	Equals	Country
Employee	Location ID	Equals	Location Id

Share the COVID-19 Risk App

To give Strategy Planner users access to the dashboards, share the COVID-19 Risk app.

1. Use the App Launcher to search for and open Analytics Studio.
2. Click **All Items** then **Apps**.
3. Find the COVID-19 Risk app. From the inline dropdown, select **Share**.
4. Under Give Access, select **Viewer** for the Entire Organization.
5. Save your changes.

Note: In this context, the entire organization is limited to those users with access to Strategy Planner, which requires an Einstein Analytics license and the Strategy Planner Access permission.

SEE ALSO:

Assign Licenses and Permissions for Workplace Strategy Planner

Organize Your Data and Team

After Strategy Planner and the COVID-19 Risk app and dashboards are installed and configured, you're ready to confirm, edit, and add data. Some data is stored in Workplace Command Center and managed by the Workplace Admin. Other data is stored in Strategy Planner and should be added and managed by Workplace Operations Managers.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

Strategy Planner requires a Workplace Command Center and a Tableau CRM add-on license.

Confirm or Add Required Data

Confirm that the required fields for the Address, Employee, and Location Assessment objects are populated for all workplace locations before using the Strategy Planner dashboards. Import, add, or correct the data in your org as needed.

Confirm Wellness Check Survey Data

Strategy Planner calculates the percent of employees who are ready to return to the workplace using the employee status survey data. Confirm that you're using the Wellness Check survey, or set up your own.

Prepare Your Team

After you complete the Workplace Strategy Planner configuration, it's time to coordinate your team so the dashboard works. Make sure your team has the information they need to provide data for Location Assessment fields, set opening and closing thresholds for each metric, and use the dashboard.

Prepare for Package and Template Updates

Workplace Strategy Planner is a managed package created and maintained by Salesforce. Updates can be pushed automatically to your org, but some require manual changes. Updates to the Analytics dashboard template sometimes must be copied into your org.

Troubleshoot Strategy Planner Dashboard Data

If data in your Workplace Strategy Planner dashboards looks stale or is missing, you might be able to resolve any issues yourself. If issues persist, contact Salesforce Customer Support.

Confirm or Add Required Data

Confirm that the required fields for the Address, Employee, and Location Assessment objects are populated for all workplace locations before using the Strategy Planner dashboards. Import, add, or correct the data in your org as needed.

Workplace Strategy Planner relies on data from the Address, Employee, and Location Assessment objects. Data on the Address and Employee object can be added to your org while setting up Workplace Command Center. Data on the Location Assessment object is added in Strategy Planner. Import, add, or correct the data in your org as needed. The Workplace Strategy Planner dashboards may display inaccurate data if any of the required fields are missing or improperly formatted, or if employee records aren't associated with a workplace location.

USER PERMISSIONS

To access and edit Workspace Strategy Planner:
- Strategy Planner Access permission set

  Workplace Admin Access or Workplace Operations Access permission set group

To add and edit Workplace Command Center and Wellness Check data:
- Workplace Admin Access

Address

Address data is added to your org during the initial Workplace Command Center configuration. However, Strategy Planner requires more fields than the Command Center. Import, add, or edit the following address fields each workplace location as needed to ensure Workplace Strategy Planner functions correctly.

- **State:** Maps COVID-19 public data to US location records. Use the two letter State code. A location in California, for example, must use the value CA in the State/Province section of the address field.
- **Country:** Populates Non-US locations with metrics from the COVID-19 public data source. This field requires the full name of a country, with the exceptions of the UK and USA.
- **Latitude:** Used to add location to dashboard map.
- **Longitude:** Used to add location to dashboard map.
- **County:** Populates US locations with metrics from the COVID-19 public data source. County name values are case sensitive and require an exact match to the COVID-19 public data source. Verify that the county field values in your location records match the county names listed in the States and Counties in USA dashboard in Analytics Studio.
- **Region:** Allows location data to roll up into the global region overview of the dashboard.

Employee

Employee records are associated with locations during the initial Command Center configuration. We also recommend you confirm this data in your org.

- **Location:** Allows for calculation of employees ready to return at each workplace location.

Location Assessment

The Location Assessment fields are added to your org in the Workplace Strategy Planner managed package. We recommend Workplace Operations Managers populate these fields. After you complete the Strategy Planner configuration, work with or advise your team as needed to complete this process.

- **Business Priority Score:** Used in calculating Business Priority risk level.
- **Regional Guidance Score:** Used in calculating Government Guidance risk level.

Note: The custom fields county and region were added to the standard object Address on version 5.3 of the Workplace Command Center managed package. If you're adding Workplace Strategy Planner to a Work.com org that installed an earlier version of

Workplace Command Center, you must add county and region values to your location records. You can do this manually or with your preferred data import or upload tool.

SEE ALSO:

Create and Import Location and Address Records

Create and Import Employee Records

Add Location Assessment Data

Confirm Wellness Check Survey Data

Strategy Planner calculates the percent of employees who are ready to return to the workplace using the employee status survey data. Confirm that you're using the Wellness Check survey, or set up your own.

By default, the value for the Workplace Strategy Planner metric % Ready to Return is calculated from the employee status field. Employees with the Available to Work wellness status are considered ready to return. This data is collected through the employee wellness survey when you configure Wellness Check survey mappings following our recommendations.

Strategy Planner includes the availability of all employees. Survey results for employees assigned to sublocations roll up into data for the parent location.

If you're using a custom survey or would like to set up a custom survey, review how to set up Wellness Check survey mappings.

SEE ALSO:

Configure Wellness Check Survey Mappings

Create and Import Employee Records

USER PERMISSIONS

To access and edit Workspace Strategy Planner:

- Strategy Planner Access permission set

  Workplace Admin Access or Workplace Operations Access permission set group

To add and edit Workplace Command Center and Wellness Check data:

- Workplace Admin Access

Prepare Your Team

After you complete the Workplace Strategy Planner configuration, it's time to coordinate your team so the dashboard works. Make sure your team has the information they need to provide data for Location Assessment fields, set opening and closing thresholds for each metric, and use the dashboard.

After installing and configuring Workplace Strategy Planner, the app requires additional data and setup. A Workplace Admin can complete this process, but we recommend that Workplace Operations Managers and their teams complete the setup as follows.

1. Have your operations teams add data to the location assessment object, including information about your business priorities and operational guidelines. The operations team may need to work with business leaders or executives to collect the information they need. Location assessments fields are used as (or to provide context for) metrics in the dashboard. After all the fields are populated for all workplace locations, set opening and closing threshold values for every metric.

2. Work with the Workplace Operations Managers and others at your organization and make sure they understand the Workplace Strategy Planner components and how they work together. Prepare them and other team members, including executives and leaders, by sharing the Workplace Strategy Planner documentation and other Salesforce resources.

SEE ALSO:

Add Location Assessment Data

Evaluate Opening and Closing Thresholds for Workplace Locations

Components in Workplace Strategy Planner

Prepare for Package and Template Updates

Workplace Strategy Planner is a managed package created and maintained by Salesforce. Updates can be pushed automatically to your org, but some require manual changes. Updates to the Analytics dashboard template sometimes must be copied into your org.

When available, a new version of the package is pushed to your org. Most updates appear automatically, though some features or changes can require configuration.

The COVID-19 Risk app template included in Workplace Strategy Planner is also created and maintained by Salesforce. When Salesforce releases a new version of the template, a notification appears in the app. To add the changes, update the template manually.

Any customizations you made to the COVID-19 Risk app can be overwritten when you upgrade the template. If you accept a template upgrade, you may need to recreate any customizations in your app. You can't import or transfer customizations from a previous to a new version.

Watch the Work.com release notes to know when we plan to update Workplace Strategy Planner or the dashboard template.

SEE ALSO:

Work.com Release Notes

Upgrade a Tableau CRM App

Troubleshoot Strategy Planner Dashboard Data

If data in your Workplace Strategy Planner dashboards looks stale or is missing, you might be able to resolve any issues yourself. If issues persist, contact Salesforce Customer Support.

Some medical trend metrics don't seem accurate or current.

Some medical trend criteria metrics, such as New Tests per 100,000 and Confirmed New Cases per 100,000, are populated by the COVID-19 public data sets. Manually run the data sync the WorkDotCom Snowflake Connector in the Tableau CRM Data Manager. Then, confirm that the configuration steps to populate the app with data and scheduled the dataflow updates have been completed correctly.

Confirmed New Cases per 100,000 data is missing for a US location.

For a US location, make sure the county name is included on the address record and matches the name in the Tableau CRM Dashboard called States and Counties in USA. This field is case-sensitive. For a non-US location, confirm the country field on the address record is correct. Country names must be spelled in full, except for the UK and USA.

New Tests per 100,000 and Percent Positive data are missing for a US location.

Make sure the State field is included on the address record and uses the two letter code. For example, a location in California must use the value CA. Washington DC requires the value DC for the State field.

Changes made to threshold values or location assessment fields (such as business priority or hospital capacity metrics) don't appear in the dashboards.

Tableau CRM dashboards don't immediately display updates made to data in your org. Changes appear after the next scheduled update to the SFDC_LOCAL dataflow. Manually run the data sync to see changes immediately.

SEE ALSO:

Schedule Dataflow Updates

Confirm or Add Required Data

Understand Workplace Strategy Planner Criteria, Metrics, and Thresholds

Evaluate Opening and Closing Thresholds for Workplace Locations

Use Workplace Strategy Planner to help make operating decisions during the COVID-19 crisis. Strategy Planner brings together metrics on medical trends, government guidance, business priorities, and employee sentiment into your Work.com org. Set opening and closing thresholds for these metrics and evaluate the conditions at each workplace location in a single dashboard.

Workplace Strategy Planner is a Work.com app designed for a small group of Workplace Operations Managers who are familiar with your organization's operating and safety procedures. It integrates your Work.com location data with COVID-19 public health information and government recommendations into an interactive dashboard. With the dashboard, you can evaluate the COVID risk at each of your workplace locations. Use it to help decide when to open or close, based on the current risk level and your business priorities.

To use Workplace Strategy Planner, the app must first be installed and configured by a Workplace Admin. You must also add your own location assessment metrics and set opening and closing thresholds before using the dashboard. We recommend a Workplace Operations Manager or team collaborate with the Workplace Admin and business leaders at your organization to complete this setup.

Review Workplace Strategy Planner Considerations on page 295 before setting up the dashboard and using the app.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

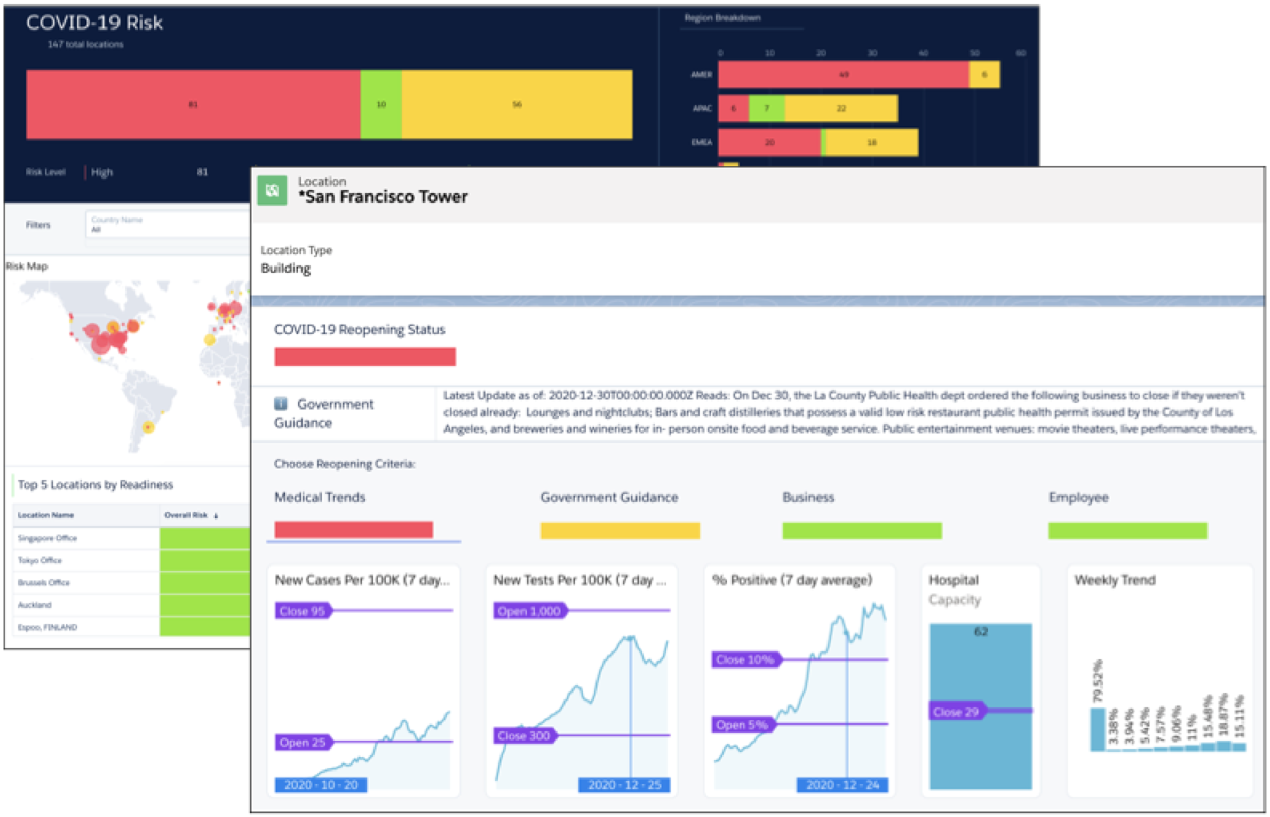
Strategy Planner requires a Workplace Command Center and a Tableau CRM add-on license.

USER PERMISSIONS

To access and edit Workspace Strategy Planner:

- Strategy Planner Access permission set

  Workplace Admin Access or Workplace Operations Access permission set group



[Understand Workplace Strategy Planner Criteria, Metrics, and Thresholds]

Workplace Strategy Planner criteria function as categories for metrics. Metrics track discrete data points. Each metric can have an opening and closing threshold value. The threshold values are used to determine the risk level for every workplace location. This information is aggregated and organized into the criteria displayed in the dashboard.

[Customize Threshold Values]

Set the opening and closing threshold values for every metric to calculate the risk levels at workplace locations.

[Add Location Assessment Data]

The location assessment object includes fields that store data for medical trends, business priority, and government guidance criteria. Use the location assessment tab to add your data for each workplace location.

[How Risk Levels Are Calculated]

Look across four criteria at each location to understand the current operating conditions and risks.

[Read, Customize, and Share Dashboards]

The Workplace Strategy Planner home dashboard and location record component are based on a Tableau CRM template. Most elements are intuitive, but a few may require that you review Tableau CRM documentation. Customize and share the dashboard using Tableau CRM Analytics Studio.

Understand Workplace Strategy Planner Criteria, Metrics, and Thresholds

Workplace Strategy Planner criteria function as categories for metrics. Metrics track discrete data points. Each metric can have an opening and closing threshold value. The threshold values are used to determine the risk level for every workplace location. This information is aggregated and organized into the criteria displayed in the dashboard.

Workplace Strategy Planner uses the following criteria and metrics to measure the performance and risk level at each workplace location. Unless noted, metrics are used to calculate the risk for the related criterion. This table defines the data type, source, and where an element appears in Workplace Strategy Planner when the app is set up following our recommendations.

Criteria or Metric Name	Description	How it's Used	Data Type and Source
Medical Trends	Data related to COVID-19 testing and patient care.	Criterion.	N/A
Confirmed New Cases per 100,000	7 day moving average of confirmed new COVID-19 cases per 100,000 people. This data is reported on a county level for US locations and on a country level for non-US locations.	Medical trends metric.	Number. COVID-19 public data source.
Percent Positive	Percentage of COVID-19 tests that are positive, 7 day moving average. Calculated by dividing the confirmed new cases by new tests. This data is reported on the State level for US locations and isn't available for non-US locations.	Medical trends metric.	Number. COVID-19 public data source.
New Tests per 100,000	7 day moving average of new tests performed per 100,000 people. This data is reported on the State level for US locations and isn't available for non-US locations.	Medical trends metric.	Number. COVID-19 public data source.
Hospital Capacity	Percentage of intensive-care units, hospital beds, or other medical amenities available for patient care.	Medical trends metric.	Number. Set by your team in Salesforce, on the Location Assessment object.
Government Guidance	Public policy and government recommendations or restrictions.	Criterion. Additional information under the Gov Guidance section of each location record component.	Text. COVID-19 public data source. This criterion provides additional information on public restrictions, such as school closures, events, and travel. For more information, review Codebook for the Oxford Covid-19 Government Response Tracker.
National Guidance Score	A number (0 to 100) set by Oxford University, based on a country's national policies or guidelines. A higher score means that there are more or stronger restrictions. For more information, review the Policy Stringency index.	Government guidance metric.	Number. COVID-19 public data source.
National Guidelines	Details on opening phases, conditions, or restrictions that are set by a national governing body or political leader.	Government guidance metric. Not used to calculate criterion risk level. Appears on location records.	Text. COVID-19 public data source.

Criteria or Metric Name	Description	How it's Used	Data Type and Source
Regional Guidance Score	A number (0 to 100) set by your organization that indicates the restrictiveness of local public policies and operating guidelines. A higher score means that there are more or stronger restrictions.	Government guidance metric.	Number. Set by your team in Salesforce, on the Location Assessment object.
Regional Guidance	Details on opening phases, conditions, or restrictions that are set by a local governing body or political leader.	Government guidance metric. Not used to calculate criterion risk level. Appears as a field on the Location Assessment object	Text. Set by your team in Salesforce, on the Location Assessment object.
Business Priority	The importance your organization places on opening or operating a location.	Criterion.	N/A
Business Priority Score	A number (0 to 100) set by your organization used to indicate the importance of this location being open and operating. The priority could be any business need, such as sales or production. A higher score means a greater priority.	Business priority metric.	Number. Set by your team in Salesforce, on the Location Assessment object.
Business Guidelines	The business priorities and operating guidelines, policies, or requirements set by your organization. For example, capacity limitations, physical barriers, or mandatory distances.	Business priority metric. Not used to calculate criterion risk level. Appears as a field on the Location Assessment object.	Text. Set by your team in Salesforce, on the Location Assessment object.
Employee Data	Workforce availability, based on employee health and preference.	Criterion.	N/A
% Ready to Return	Percentage of employees who indicate they're ready to work at their assigned location. Employees assigned to sublocations are included in the total count of the related parent level location. This data is self-reported and collected through the Wellness Check survey.	Employee data metric.	Number. Percent of employees at each location with "Available to Work" Wellness Status from Wellness Check survey.

You must maintain and update data that is set by your team in Workplace Strategy Planner.

The COVID-19 public data is updated twice a day. Salesforce doesn't commit to supporting a specific source for COVID-19 public data. Organizations providing data to the COVID-19 public data set may change. Salesforce doesn't assert and can't verify the accuracy or availability of any data provided through the Snowflake Data Warehouse.

SEE ALSO:

Components in Workplace Strategy Planner

Customize Threshold Values

Set the opening and closing threshold values for every metric to calculate the risk levels at workplace locations.

The Workplace Strategy Planner dashboard requires an opening and closing threshold value for every metric. The app prompts you to set the threshold values when first launched, but you can return to the Thresholds tab to edit the values anytime.

1. From the Thresholds tab, find a metric in the table.
2. From the dropdown menu, select **Edit Thresholds**.
3. Set a value in the fields for Opening Threshold and Closing Threshold.
4. Click **Save**.

You can also click **Use Default Thresholds** to review and apply default values for all thresholds. The default values, selected and approved by the Salesforce Advisory Board, are intended to illustrate how Workplace Strategy Planner works.

If you don't set a threshold value, the default value is used to calculate the risk level for that metric, allowing the related criterion to populate the dashboard. However, all threshold values remain null until you, or someone in your org, sets them.

We recommend you set custom values for every threshold. Choose values based on your unique business priorities, the conditions at and around each workplace location, and your organization's risk tolerance. Work with your extended team and discuss the impact the threshold values may have.

SEE ALSO:

Workplace Strategy Planner Considerations

Add Location Assessment Data

The location assessment object includes fields that store data for medical trends, business priority, and government guidance criteria. Use the location assessment tab to add your data for each workplace location.

By default, location assessment records are created for every location and sublocation. We recommend filtering your Location Assessment Details list view to display workplace locations of a certain size. For example, you may want to filter location type to display only Buildings and Sites. More granular location types, like Floor, and less granular types, like Pacific Northwest, may be less relevant for devising a workplace reopening strategy.

When Workplace Strategy Planner is configured following our recommended setup, some metrics are automatically populated in Workplace Strategy Planner. Add your own data for the following metrics:

- **Business Guidelines**

  We recommend you consult organization leaders and local operation teams to determine the Business Guidelines for each workplace. COVID-19 trends and working conditions can vary greatly between locations.

- **Business Priority Score (required)**

The Workplace Strategy Planner dashboards may display inaccurate data without a value for this field, or if the value is improperly formatted. If you don't plan on using this metric, assign it a value that is within your opening threshold. This ensures the metric doesn't impact the overall risk calculation for each location.

- **Regional Guidance (required)**

  The Workplace Strategy Planner dashboards may display inaccurate data without a value for this field, or if the value is improperly formatted. If you don't plan on using this metric, assign it a value that is within your opening threshold. This ensures the metric doesn't impact the overall risk calculation for each location. For data on Regional Guidance, consult public recommendations from the workplace location's city or regional government.

- **Regional Guidance Score**

  We recommend you consult organization leaders and local operation teams to determine the Regional Guidance Score for each workplace. COVID-19 trends and working conditions can vary greatly between locations.

- **Hospital Capacity**

  Consider reviewing data from the Centers for Disease Control and Prevention and the Department of Health and Human Services

These metrics are stored as fields on the Location Assessment object. Use the Location Assessment Details list view to access these fields for each location. If you manage few workplace locations, add the data manually. The list view allows you to manually edit values for multiple locations at the same time. Use a data loader or import tool if you need to add data for many location assessment records. Work with your admin if you're not sure how to proceed.

Collaborate with the Workplace Admin at your org to better understand how all the data works together and is calculated in Workplace Strategy Planner.

Note: When Workplace Strategy Planner is installed in your Work.com org, a new location assessment record is automatically created for each location record. After installation, a location assessment record is created when a new location is added in your org unless the Workplace Strategy Planner location trigger (*wkplan__LocationTrigger*) is disabled.

SEE ALSO:

Understand Workplace Strategy Planner Criteria, Metrics, and Thresholds

Confirm or Add Required Data

How Risk Levels Are Calculated

Look across four criteria at each location to understand the current operating conditions and risks.

By default, the Workplace Strategy Planner dashboard displays the risk level at each location along four criteria:

- Medical trends
- Business priority
- Government guidance
- Employee data

It also displays the overall risk level and weekly trends at each location.

To determine if a location is at a high, medium, or low risk level, Workplace Strategy Planner evaluates the current data for each metric against the opening and closing thresholds values, and aggregates the results into criteria. The collective criteria results are then used to calculate the overall risk level for a location.

- A location is considered low risk when all metrics in all criteria reach or surpass the opening threshold values.
- A location is considered high risk when one metric in any criterion reaches or surpasses the closing threshold value

- A location is considered medium risk under any other conditions.

For example, if at the location called San Francisco Office, the values for all medical trend metrics reach the opening thresholds, the medical trends criterion is low risk. If the government guidance, business priorities, and employee data criteria also all reach low risk, then the San Francisco Office location is considered low risk.

Any other data values in any metrics move the San Francisco Office to either high or medium risk. For example, if the value for any metric reaches the closing threshold value, the criterion and the San Francisco Office location move to high risk. The San Francisco Offices is at medium risk when individual metrics are a mix of medium and low risk.

SEE ALSO:

Understand Workplace Strategy Planner Criteria, Metrics, and Thresholds

Read, Customize, and Share Dashboards

The Workplace Strategy Planner home dashboard and location record component are based on a Tableau CRM template. Most elements are intuitive, but a few may require that you review Tableau CRM documentation. Customize and share the dashboard using Tableau CRM Analytics Studio.

By default, you can access the dashboard from the Home tab in the Strategy Planner app. To customize the dashboard, use the App Launcher to find Analytics Studio. Select the COVID-19 Risk dashboard and use the Tableau CRM editing tool to make changes.

The dashboard component on location records is visible only to users with a Tableau CRM license. The component displays the current risk level for each criterion at that specific location.

When using the COVID-19 Risk dashboard, remember:

- Not all metrics are included in the criteria calculations. The National Guidelines and Regional Guidance metrics are only used to provide more context on public restrictions and recommended operating procedures set by local and national government.
- Location assessment records are created for every location and sublocation. By default, the dashboard is filtered to display data for records in which the location type equals Building. Use the dashboard filter to display other location types, like Warehouse. Check with your Workplace Admin for more information on customizing location types.
- Employees assigned to sublocations are included in parent location when calculating the metric % Ready to Work. For example, both an employee assigned to the location Building A and an employee assigned to the sublocation Floor 1 of Building A are included in the same location calculation of % Ready to Return.
- Give special consideration to the locations that are most volatile before making operating decisions about those workplaces. The data could be incomplete or inaccurate, and warrants investigation.
- Review and update location assessment data for workplace locations regularly.
- Review and update your opening and closing threshold values as information about the spread and impact of COVID-19 develops.
- If a threshold value isn't set for any metric, the default value is used to calculate the risk level for that metric in the dashboard.
- Metrics that are missing data are calculated differently in the home and location record dashboards. Missing data are calculated as zero values in the risk calculation on the home dashboard. Missing data are excluded from calculations on the location record dashboard component. This means that missing data increases the risk assessment on the home dashboard but has no impact in the location record component. A metric automatically populated by the COVID-19 public data source may be missing data if the connector is misconfigured or the data source is unavailable. Metrics populated from fields on the location assessment object may be missing data if your team hasn't added the field values to your org.

The standard Tableau CRM editing tools and options are available, but we'd like to note these options that are particularly helpful for Workplace Strategy Planner:

- Set notifications on a dashboard widget. Set an alert or get an email to know when a location or criteria reaches a specific value. This is helpful when monitoring a location that's considered to be a high priority for your organization

- Share the dashboard with other Workplace Command Center users. Workplace Strategy Planner requires an additional license, so only a few people in your organization are likely to have access to the dashboard. Share an image or a link to the dashboard with other users or groups.
- Jump to a location record from the dashboard. From any table on the home dashboard, click Open Record in a row to open the location record for that workplace. The dashboard component on the location record includes details on operating guidelines and government restrictions for that location.

SEE ALSO:

Explore and Visualize Your Data in Tableau CRM

Build Tableau CRM Dashboards

Sales Enablement (myTrailhead) for Learning and Wellness

With Sales Enablement (myTrailhead), you can give your employees all the info they need to get back to work and stay healthy. With Trail Tracker and Trail Tracker for Work.com, you can keep tabs on the badge completion trends at specific workplace locations and across your whole company. And with that information, you can decide when it's time to reopen for business.

Sales Enablement delivers your company's unique enablement content through a branded experience powered by the Trailhead online learning platform. You can create and publish content that helps everyone at your company get up to speed on returning to work. When your workforce is back in the groove, publish more content that helps everyone stay active and thrive.

Combined with the insights you can gather from Trail Tracker for Work.com, Sales Enablement is key to ensuring that your workplaces are ready for action.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

Workplace Command Center is available as an add-on license.

SEE ALSO:

Sales Enablement Rollout Guide

AppExchange: Trail Tracker

AppExchange: Trail Tracker for Work.com

Trail Tracker for Work.com Installation Guide

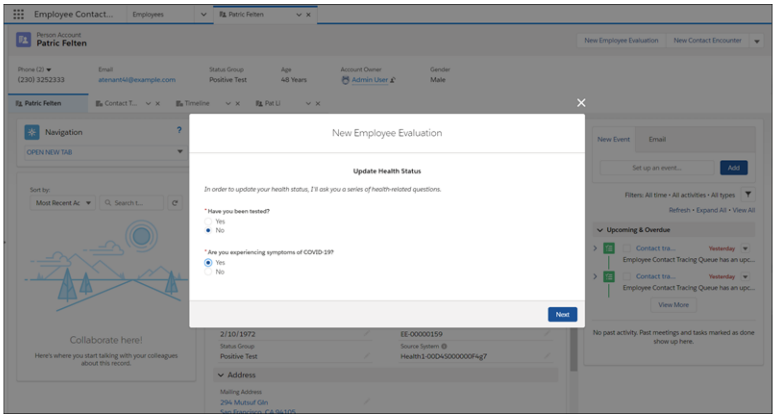
Contact Tracing for Employees

With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees.

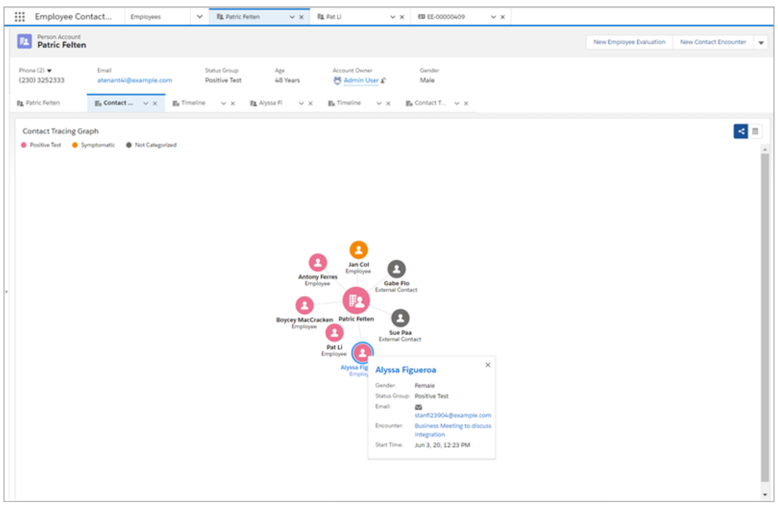
Tracing and contacting people who were possibly exposed to an infected person is one of the most efficient ways to fight widespread community infection. Tracers pick up tasks to evaluate employees, gather details about potentially exposed contacts, and enroll employees in care programs. You have the employee's status, a map of exposed contacts, and information on the person's condition consolidated in one place.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.



The employee evaluation flow gathers crucial information about a person’s condition, so that you can enroll affected employees into a care program and monitor their health.



The Contact Tracing Graph gives you a comprehensive view of employees and external contacts so that you can trace infection by people, places, or events. Follow up, assessment, and triage can happen without having to leave the console.

Salesforce recommends that you make contact tracing functionality available only to users who are trained on privacy best practices. We recommend that you share contact tracing data only on a need-to-know basis.

SEE ALSO:

Contact Tracing for Employees

Digital Trust Cards

Show your customers how you keep them safe as your business reopens during COVID. Trust Cards are a great way to give customers peace of mind in these uncertain times. Create a Trust Card for each of your business locations, and publish these trust cards on your website. Each trust card displays location trust measures, or COVID safety protocols that your business follows.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

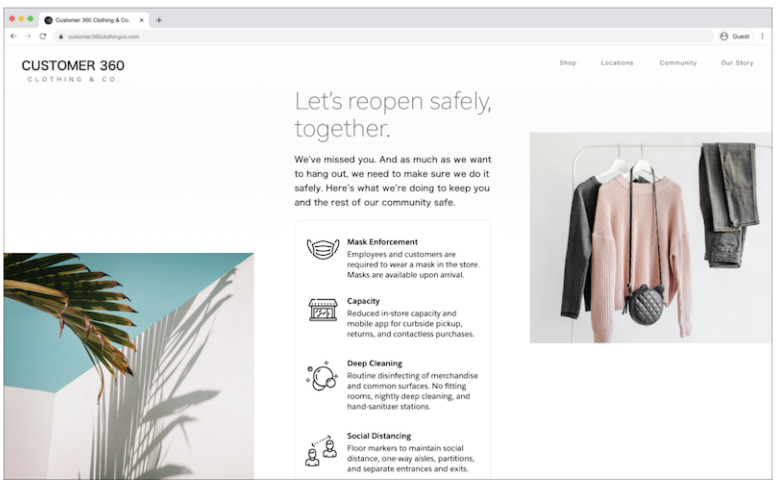
USER PERMISSIONS

To view locations; create, read, edit, and delete trust measures; and preview your location's trust card:

- Trust Card Manager permission set

What Does a Trust Card Look Like?

Here's an example trust card for Customer 360 Clothing & Co, a fictional clothing company with retail stores nationally. This trust card reflects the COVID guidelines for the company's Anywhere, CA location. Trust measures include the enforcement of masks, social distancing, cleanliness, and capacity limits. The trust card is displayed on Customer 360 Clothing & Co's website:



A trust card includes a location and several trust measures. A location represents a retail store, branch of a hotel chain, or other physical space your business occupies. A trust measure represents COVID safety protocols that your business location follows, such as mask or social distancing enforcement.

Many businesses have multiple physical locations. Create a unique trust card for each location to reflect the national and local COVID guidelines for that location. COVID guidance changes regularly, so assign each location to a Trust Card Manager who can keep the trust measures current to the guidelines.

Who Manages Trust Cards?

Your admin:

- Activates the trust cards feature, which creates a code snippet for your company website.

- Works with your developer resources to customize the code snippet and embed it on your company website.
- Assigns the Trust Card Manager permission set to users.
- Creates each trust card location, and assigns them to your trust card managers. A trust card manager can only manage the locations that an admin assigned to them.

Your Trust Card Manager:

- Creates trust measures, or COVID safety protocols, for each business location they're assigned to.
- Publishes the trust measures, and chooses the layout for a location's trust card. As long as their admin previously embedded the code on the company's site, these steps publish the trust card live to customers.

How Does a Trust Card End up on Your Website?

Add one code snippet to your website once. Each location has an External Reference field, which is a unique ID that tells the code snippet when to display that particular location's trust card. When trust measures for a location are published, the trust card is live on any website where the code is embedded.

Install and Configure the Digital Trust Cards Feature

You must be an admin to activate the trust cards feature, customize and generate the code snippet for your website, and create trust card business locations. Before you enable your team of managers to create a unique trust card for each location, take these steps.

Create and Publish a Digital Trust Card on Your Website

Develop a strategy for your trust cards by studying government guidance. Then create location trust measures to reflect the steps you take to keep your customers safe in your business location. Publish these trust measures to your website as a trust card.

Install and Configure the Digital Trust Cards Feature

You must be an admin to activate the trust cards feature, customize and generate the code snippet for your website, and create trust card business locations. Before you enable your team of managers to create a unique trust card for each location, take these steps.

Admins play a major role in setting up trust cards for your company:

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

Activate Digital Trust Cards

Our quick and easy setup flow builds the code snippet that hosts your trust cards.

Generate the Digital Trust Cards Code Snippet for Your Website

Add the trust cards feature to your website by embedding a code snippet once. You must be an admin to generate the initial code snippet in Salesforce.

Enable Your Team to Manage Digital Trust Cards

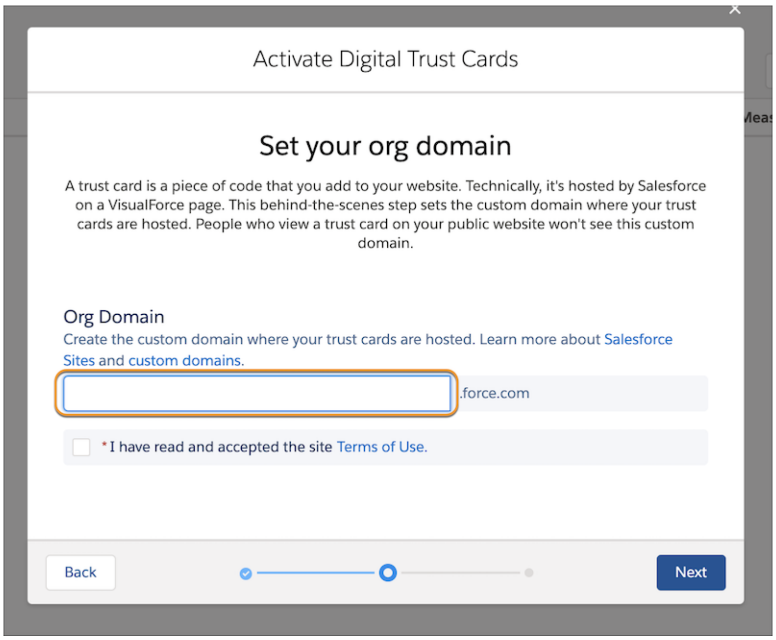
Creating and managing a unique trust card for each of your business locations is a significant job. As an admin, delegate this work to the manager of each business location. Add the Trust Card Manager permission set to each location manager's user profile. If the location manager doesn't need access to the rest of Salesforce, create a Trust Card Manager user profile based on the identity user.

Activate Digital Trust Cards

Our quick and easy setup flow builds the code snippet that hosts your trust cards.

If you don't already have a site domain for your trust cards, you can manually create one during setup. To activate trust cards:

1. Open **Setup**.
2. Click the **Get Started** button under Activate Trust Cards.
3. Review the trust cards description, and click **Next**.
4. Create the domain where your trust card code snippet lives. Enter the first part of your custom domain.



5. Review the work.com terms of use, then check the box to acknowledge that you read it.
6. Click **Next** to see the Success screen.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

USER PERMISSIONS

To run Lightning Setup Flow for trust cards:

- CustomizeApplication permission and ModifyAllData permission

To access Setup:

- ViewSetup permission

Generate the Digital Trust Cards Code Snippet for Your Website

Add the trust cards feature to your website by embedding a code snippet once. You must be an admin to generate the initial code snippet in Salesforce.

To generate a code snippet, simulate creating a trust card. As a reminder, a trust card consists of one location and multiple location trust measures.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

To activate trust cards, complete the setup flow, then create at least one location and one published trust measure. Copy the resulting code snippet, and embed it on your website. After that, any new trust card that your location managers publish displays on your website.

Create a Digital Trust Card Location

A trust card location represents the retail store, hotel, or other physical space that your business occupies. A location is one part of a trust card. You must be an admin to create a trust card location.

Create a Location Trust Measure

A trust measure tells your customers a step that you take to keep them safe during COVID. You must be the owner of a trust card location to create a trust measure.

Preview Your Digital Trust Card

The trust card preview window serves two purposes. First, an admin can generate a code snippet to embed the trust cards feature on your website. Second, a trust card manager can see what their unique trust card looks like when it's displayed on your website.

Add Custom Colors and Fonts to Your Digital Trust Card

To customize the look of your trust card, upload a custom CSS file.

Customize Your Apex Class during Digital Trust Cards Setup

To customize your Apex Class, activate trust cards and update the Apex Class in your sandbox, then push the changes to your production org.

Customize Your Digital Trust Cards' Metadata

As you move through the Lightning Platform setup flow to activate trust cards, metadata is set behind the scenes. Edit the metadata to change the trust card layout, edit the domain or site, or update sharing rules and permissions.

Hide the iFrame While You Onboard Trust Card Managers

Prevent a blank square from appearing on your website while your Trust Card Managers draft and design their trust cards.

Customize Your Trust Cards' Query

To modify the query for your trust cards, customize the Apex Controller in your developer org, test it in your sandbox, and push the changes to your production org. For example, you want to pull in custom field data for the location or location trust measure objects. Or you want to pull in additional standard fields for the location object.

Create a Digital Trust Card Location

A trust card location represents the retail store, hotel, or other physical space that your business occupies. A location is one part of a trust card. You must be an admin to create a trust card location.

A trust card contains one location and one or more location trust measures.

EDITIONS

Available in: Lightning Experience

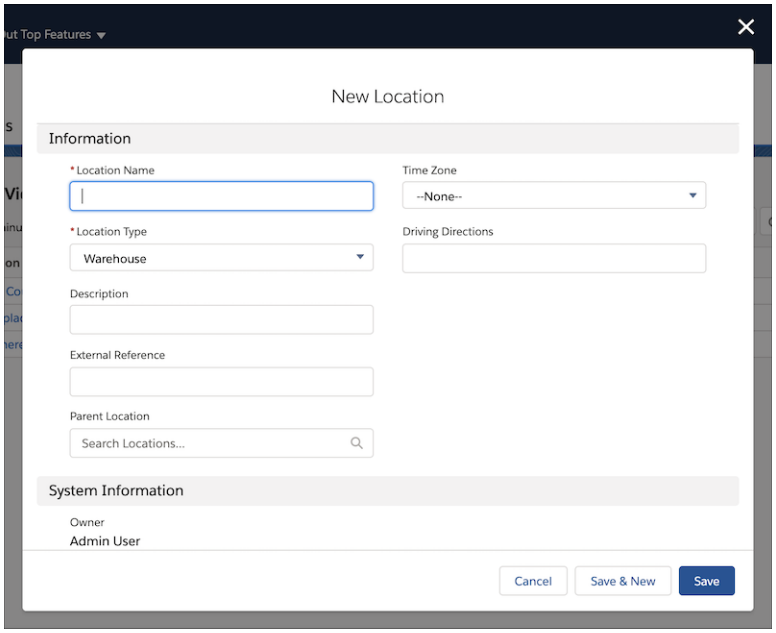
Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

Your trust card managers can create trust measures, but only an admin can create a location.

Note: Configure the Location Type field before you create a location. Location Type is a field that's shared by multiple Salesforce Products. Avoid any confusion by reading the Location Type guidance on page 322.

Create a trust card location:

1. Launch **Trust Cards** from the App Launcher.
2. Click the **Locations** tab.
3. Click **New Location**.
4. Fill in the fields on the new location modal:



   a. Location Name: The name of your location. To differentiate each location, choose a naming pattern based on how location names differ from each other and how they relate to your business. You can sort by location name in the location view.
   b. Time Zone: Choose the time zone for the physical location of the business.
   c. Location Type: Configure the Location Type field on page 322 before you can create a location.
   d. Driving Directions: Describe how to travel to this location.
   e. Description: Other notes that are helpful to your team when viewing this location in Salesforce.
   f. External Reference: A unique identifier for this location only. External Reference tells the code snippet on your website when to display this location.
   g. Parent Location: This is an inherited field on the shared location object on page 322. It's not relevant to trust cards at this time.
   h. Owner: By default, you're the owner. Users with the Trust Card Manager permission set can only view the locations they own. To make a location viewable by a trust card manager, make that person the owner. You can also change the owner to a group of users.

5. Save your changes.

Customize the Location Type Field on the Location Object

The Location Type field adds context to the Location object. Three Salesforce products share this object. Sometimes the Location Type field requires customization, depending on the product or products you use with the Location object.

Customize the Location Type Field on the Location Object

The Location Type field adds context to the Location object. Three Salesforce products share this object. Sometimes the Location Type field requires customization, depending on the product or products you use with the Location object.

Customize the Location Type field according to your permissions and use case. If you use the location object on more than one product, all Location Type dropdown menu items appear together.

Use Case	Permissions Required	Steps to Configure the Location Type field
Field Service Lightning	You must be an admin to edit the Location Type field. Create a location with the Create on locations user permission. For more Location object permissions, read here.	The Location Type field includes these dropdown menu items by default: Warehouse, Site, Van, and Plant. Your admin can edit the dropdown menu.
Digital Trust Cards	You must be an admin to edit the Location Type field and create a location. Anyone with the Trust Cards Manager permission set can view a location.	The Location Type dropdown menu is blank by default. Your admin must add dropdown menu items before creating a trust cards location.
Digital Queue Management on page 345	You must be an admin to edit the Location Type field and create a location. Anyone with the Facility Manager permission set can view a location.	The Location Type dropdown menu is blank by default. Your admin must add dropdown menu items before creating a trust cards location.

Create a Location Trust Measure

A trust measure tells your customers a step that you take to keep them safe during COVID. You must be the owner of a trust card location to create a trust measure.

A trust card consists of one location and one or more trust measures.

The location represents a retail store, hotel, or other physical space that your business occupies. A trust measure represents a step you take to keep your customers safe when they visit a particular location. We recommend that you create 4–6 trust measures per location.

To create a trust measure:

1. Launch **Trust Cards** from the App Launcher.
2. Click the **Location Trust Measures** tab.
3. Click **New**.
4. Fill in the required fields:

EDITIONS

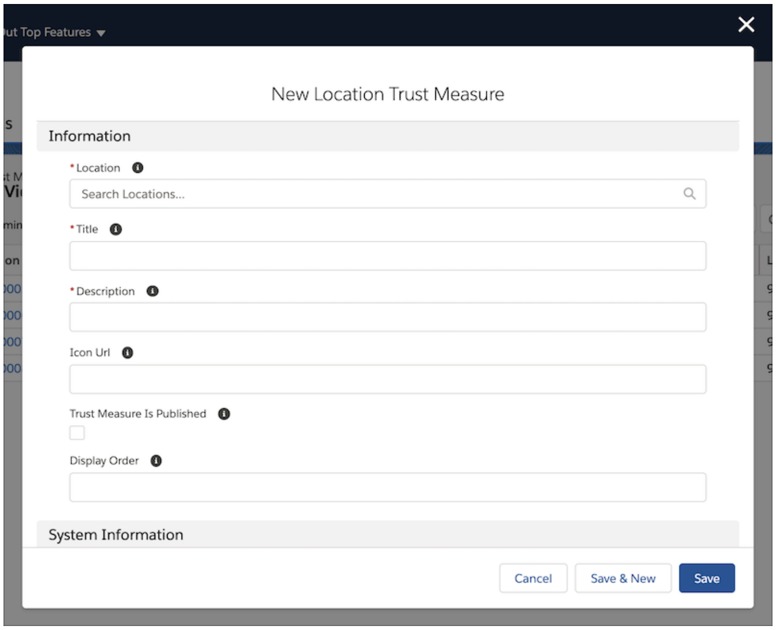
Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

USER PERMISSIONS

To view locations; create, read, edit, and delete trust measures; and preview your location's trust card:

- Trust Card Manager permission set



   a. Location: Choose the location where you want this trust measure to display. The field isn't customer-facing.
   b. Title: Summarize a step you take to keep customers safe. The field is visible to customers. In this example, we enter Mask Enforcement. You're limited to 40 characters when writing a trust measure's title.
   c. Description: To clarify the title, add additional information here. The field is also customer-facing. In this example, we enter `Employees and Customers must wear a mask at all times`. You're limited to 255 characters when writing a trust measure's description.

5. Fill in any non-required fields you'd like:
   a. Icon URL: To illustrate your trust measure with a branded icon (recommended), create the icon, and host it on your own public website. For example, host it using your web content management system or a Static Resource with a relative URL. Add your icon's URL to the Icon URL field.
   b. Trust Measure is Published: To make this trust measure appear live on your trust card for this location, check this box.
   c. Display Order: Choose where this trust measure appears in your one-column, two-column, banner, or custom trust card layout. In this example, we use a two-column layout and set this trust measure as Display Order 1. That means it's the first trust measure displayed, from left to right, in the banner.
6. Save your changes.
7. To create more trust measures for this location, repeat these steps. We recommend creating 4–6 trust measures.

Preview Your Digital Trust Card

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

USER PERMISSIONS

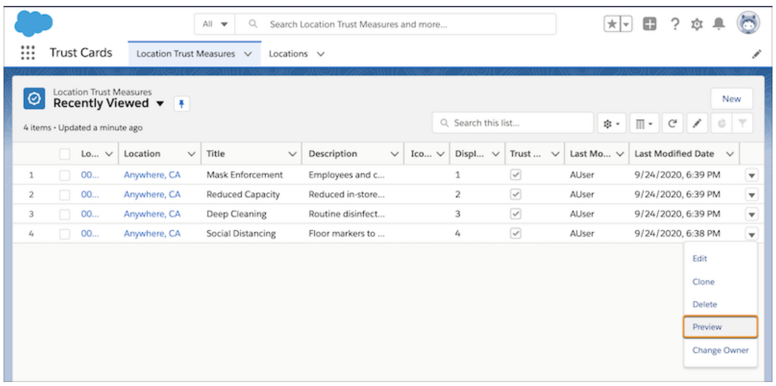
To view locations; create, read, edit, and delete trust measures; and preview your location's trust card:

- Trust Card Manager permission set

The trust card preview window serves two purposes. First, an admin can generate a code snippet to embed the trust cards feature on your website. Second, a trust card manager can see what their unique trust card looks like when it's displayed on your website.

To generate the trust cards code snippet for your website (as an admin) or preview your trust card layout (as a trust card manager):

1. Launch **Trust Cards** from the App Launcher.
2. Click the **Location Trust Measures** tab.
3. Click the dropdown menu icon to the right of a published trust measure, and select Preview.

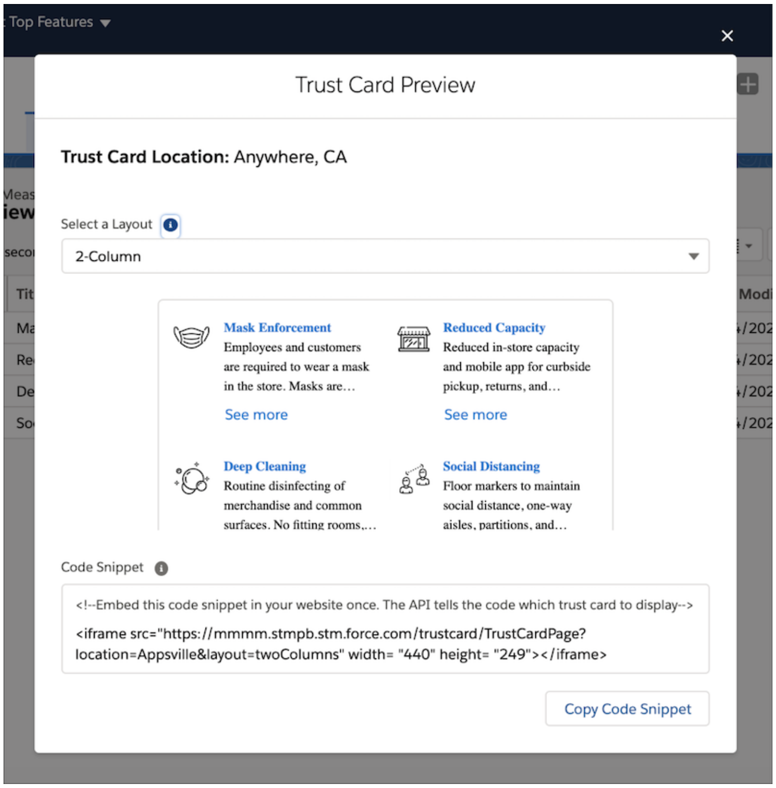


4. Select your preferred layout from the Trust Card Layout dropdown menu. The system automatically saves this change.

   If you see a Custom layout option, it means that your admin or developer added custom CSS to your website for your trust cards. Only choose Custom as instructed by your admin.

   The Banner and 1-Column layouts don't fit in the preview panel. To locate the scroll bar, hover over the preview image

5. As a trust card manager, you can preview how your layout highlights your trust measures. If an admin already embedded the code on your website, you're all set. The External Reference field on your trust card's location lets the code know where to display this unique trust card.
6. As an admin adding the code snippet to your website for the first time, to save this code, click **Copy Code Snippet**



.

7. To embed this code on your website, work with your web developer or systems administrator.

Add Custom Colors and Fonts to Your Digital Trust Card

To customize the look of your trust card, upload a custom CSS file.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

Upload Your CSS File

To add your own colors, fonts, and other branding to your trust cards, first upload those customizations with a CSS file.

1. Open **Setup**.
2. Search for `Static Resources`, and click to open it.
3. Click **New**.
4. Name the file `Custom`.
5. To upload your custom css file, click **Choose File**.
6. Select **Public** as cache control.
7. Save your changes.

Set Your Trust Card Layout to Custom

To make your trust card reflect the custom CSS, select the Custom layout.

Note: If you already embedded the trust cards code snippet on your website with a pre-defined layout, you must replace it with this custom code snippet to activate the custom CSS.

1. Open the App Launcher, and click **Trust Cards**.
2. Click the **Trust Measures** tab.
3. Publish at least one trust measure, and click the downward arrow at the far right of that trust measure.
4. Click **Preview**.
5. Select Custom in the **Select a Layout** dropdown menu.
6. Click **Copy Code Snippet**, and add it to your website.

Edit Your Visualforce Page Code (Optional)

If you add a class or change a class name in your CSS file, you must update the Visualforce page code. This step ensures that the Visualforce page code reflects your changes to the file.

1. Return to Setup.
2. Search for *`Visualforce Pages`*, and open it.
3. Scroll down to TrustCardPage, and click **Edit**.
4. Make your updates to the code.
5. Save your changes.

Customize Your Apex Class during Digital Trust Cards Setup

To customize your Apex Class, activate trust cards and update the Apex Class in your sandbox, then push the changes to your production org.

If you don't already have a site domain for your trust cards, you can manually create one during setup. To activate trust cards:

1. In your sandbox org, run Salesforce Setup Flow. If you ran the setup flow before November 23, 2020, run it again.
   a. In your sandbox org, open **Setup**.
   b. Click the **Get Started** button under Activate Trust Cards.
   c. Review the trust cards description, and click **Next**.
   d. Create the domain where your trust card code snippet lives. Enter the first part of your custom domain.

EDITIONS

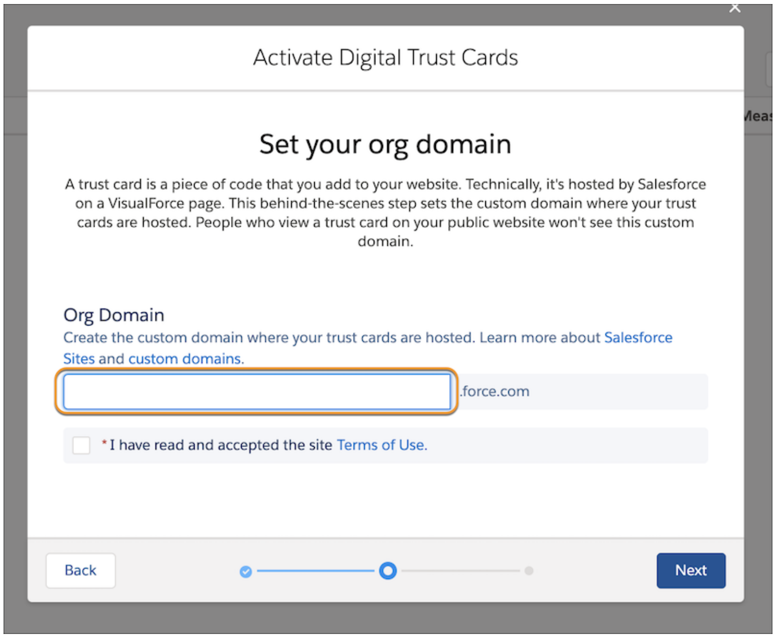
Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

USER PERMISSIONS

To run Lightning Setup Flow for trust cards:
- CustomizeApplication permission and ModifyAllData permission

To access Setup:
- ViewSetup permission



  e. Review the work.com terms of use, then check the box to acknowledge that you read it.
  f. To see the Success screen, click **Next**.

2. In your sandbox org, update and test the TrustCardController apex class.
   a. Open **Setup**.
   b. Search for `Apex Classes`, and click to open that page.
   c. Click to open **TrustCardController**.
   d. Make your updates to the TrustCardController, and save your changes.
   e. Return to the Quick Find box, enter **Apex Test Execution**, and click to open that page.
   f. Click **Select Tests...**, check the box next to **TrustCardControllerTest**, and click **Run**.
   g. When the test passes, proceed to step 3. If the test doesn't pass, repeat the substeps in step 2 until it does.

3. In your sandbox org, create an Outbound Change Set. This change set is the vehicle that moves sandbox changes to your production org.
   a. In your sandbox, return to Setup.
   b. Search for `Outbound Change Sets`, and click to open it.
   c. Click **New**.
   d. Name your changeset something like, `Trust Cards`, and save your changes.
   e. Under Change Set Components, click **Add**.
   f. In the Component Type dropdown menu, select **Apex Class**.
   g. Check the **TrustCardController** box, and click **Add to Change Set**.
   h. Repeat steps 11-13 to add the Apex Class called TrustCardControllerTest.
   i. Under Change Set Components, click **Add**.
   j. In the Component Type dropdown menu, select **Visualforce Page**.

k. Check the **TrustCardPage** box, and click **Add to Change Set**.

4. Upload your Outbound Change Set from your sandbox to your production org.
   a. In the Outbound Change Set main page, look for the change set you created, and click **Upload** to the right of it. This step starts the process of uploading your change set from your sandbox to your production org.
   b. Click the **Upload** button on the Upload Change Set page.

5. In your production org, deploy the changes you made in your sandbox org.
   a. In your production org, open **Setup**.
   b. In the Quick Find box, search for `Inbound Change Set`.
   c. Locate the change set you created in your sandbox, and click **Deploy**.
   d. Return to **Setup** > **Home**, and run Lightning Setup Flow for Trust Cards in your production org.

Customize Your Digital Trust Cards' Metadata

As you move through the Lightning Platform setup flow to activate trust cards, metadata is set behind the scenes. Edit the metadata to change the trust card layout, edit the domain or site, or update sharing rules and permissions.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

Metadata	LSF Action	Why We Take This Action	How You Customize the Metadata
Visualforce page DevName: TrustCardPage Label: TrustCardPage Found at **Setup** > **Custom Code** > **Visualforce Pages**	Create a Visualforce page. Later, configure the site's Visualforce page.	Visualforce is a framework that lets developers build a user interface on the Lightning Platform. A Visualforce page is the top-level container for a custom app built with Visualforce. We build your trust cards' user interface as a Visualforce page.	For Admins For Developers
Apex Controller DevName: TrustCardController Found at **Setup** > **Custom Code** > **Apex Classes**	Create an Apex Controller	Apex is a programming language that adds business logic to system events. An Apex controller typically retrieves data displayed on a Visualforce page. The controller then uses code that executes in response to page	For Admins For Developers

Metadata	LSF Action	Why We Take This Action	How You Customize the Metadata
		actions, such as a button being clicked.	
Static Resource DevName: TrustCardsTheme Found at **Setup** > **Custom Code** > **Static Resources**	Create a Static Resource	A static resource allows you to upload content that you can reference on a Visualforce page. The trust cards static resource offers three out-of-the-box trust card layouts for customers to use and customize.	For Admins For Developers
Domain	Create a domain	A domain is the URL address for your site. If a domain doesn't exist yet, we create one for your trust cards during this step of the setup flow.	For Admins For Developers
Site DevName: Trust_Card Label: Trust Card Found at **Setup** > **User Interface** > **Sites and Domains** > **Sites**	Create a site	A Salesforce site is a website that's directly integrated with your Salesforce org. It can display data from your org. To see your site, a customer log-in isn't necessary. If a site doesn't exist, we create one for your trust cards during this step.	For Admins For Developers
Guest User Profile DevName: Trust Card Profile Found at **Setup** > **User Interface** > **Sites and Domains** > **Sites** > **Trust Card** > **Public Access Settings**	Configure the site's guest user profile	A guest user profile dictates what an unauthenticated customer can see on your site. The guest user profile is created when the site is created. The user profile includes the ViewTrustMeasure user perm, and it gives read access to the Location and LocationTrustMeasure objects.	For Admins For Developers
Guest Sharing Rule DevName: TrustCardRuleName Label: trustCardSharingRuleLabel Found at **Setup** > **User Interface** > **Security** > **Sharing Settings**	Configure the site's guest sharing rule	A guest sharing rule states that an anonymous user can view a subset of your site without logging in if certain criteria are met. The sharing rule is applied to all sites within your org. For trust cards, the sharing rule states that a customer can see LocationTrustMeasure records only when the IsVisibleInPublic field is set to True.	For Admins For Developers

Hide the iFrame While You Onboard Trust Card Managers

Prevent a blank square from appearing on your website while your Trust Card Managers draft and design their trust cards.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** editions

Edit the Script Section of Your Visualforce Page Code for Trust Cards

Add some code to the Visualforce page to hide the iFrame.

1. Open **Setup**.
2. Search for *`Visualforce Pages`*, and open it.
3. Scroll down to TrustCardPage, and click **Edit**.
4. Add this code to the <script> section:

```
var hasItem = '{!hasItems}';
if(hasItem === 'true') {
window.parent.postMessage({
  showIframe: false
  }, '*');
}
```

5. Save your changes.

Edit the iFrame Code on Your Website

Add this script alongside your iFrame code:

```
<script>window.onmessage=e=>{e.data.hasOwnProperty("disableTrustCardIframe")&&(document.getElementById("trustCardIframe").style.display="none")}</script>
```

Customize Your Trust Cards’ Query

To modify the query for your trust cards, customize the Apex Controller in your developer org, test it in your sandbox, and push the changes to your production org. For example, you want to pull in custom field data for the location or location trust measure objects. Or you want to pull in additional standard fields for the location object.

Our Developer Guides explain how to customize your Apex Controller and how to deploy those changes from sandbox to production.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** editions

Enable Your Team to Manage Digital Trust Cards

Creating and managing a unique trust card for each of your business locations is a significant job. As an admin, delegate this work to the manager of each business location. Add the Trust Card Manager permission set to each location manager’s user profile. If the location manager doesn’t need access to the rest of Salesforce, create a Trust Card Manager user profile based on the identity user.

> Note: Note: Our Trust Card Manager permission set comes with a Trust Card Manager permission set license. When you add the Trust Card Manager permission set to a user profile, you automatically add the permission set license.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

If your location managers already work in your Salesforce org, skip to Assign the Trust Card Manager Permission Set to the User.

If your location managers aren't part of your Salesforce team, clone the Identity User profile to create a Trust Card Manager profile. The Identity User profile ensures that the user can't access the rest of your Salesforce org. Add each location manager to your org, and then assign them the Trust Card Manager profile and permission set. Follow all three steps here.

Create a Trust Cards Manager User Profile (from the Identity User Profile)

Give trust card managers a user profile that lets them access trust cards but not the rest of Salesforce. To create this user profile, clone the identity user profile, and give visibility to trust cards. Assign this user profile and the Trust Card Manager permission set to a user to make them a trust card manager.

Add a New User with the Trust Cards Manager User Profile

If your trust cards manager isn't a Salesforce user, follow these instructions to add them. Apply the Trust Cards Manager user profile so that they have visibility into the feature. Apply the Trust Cards Manager permission set so that they can create trust cards.

Assign the Trust Card Manager Permission Set to a User

The Trust Card Manager permission set lets users view locations; create, read, edit, and delete trust measures; and preview your location's Digital Trust Card. To turn a user into a trust card manager, add the permission set to their user profile.

Assign a Digital Trust Card Location to a Trust Card Manager

By default, you own any trust card location that you create. To allow a location manager to create a unique trust card for their location, change the trust card location's owner. Only Admins can create trust card locations.

Create a Trust Cards Manager User Profile (from the Identity User Profile)

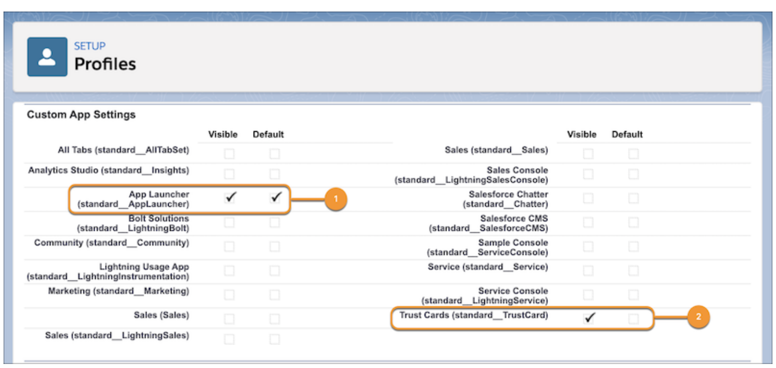
EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

Give trust card managers a user profile that lets them access trust cards but not the rest of Salesforce. To create this user profile, clone the identity user profile, and give visibility to trust cards. Assign this user profile and the Trust Card Manager permission set to a user to make them a trust card manager.

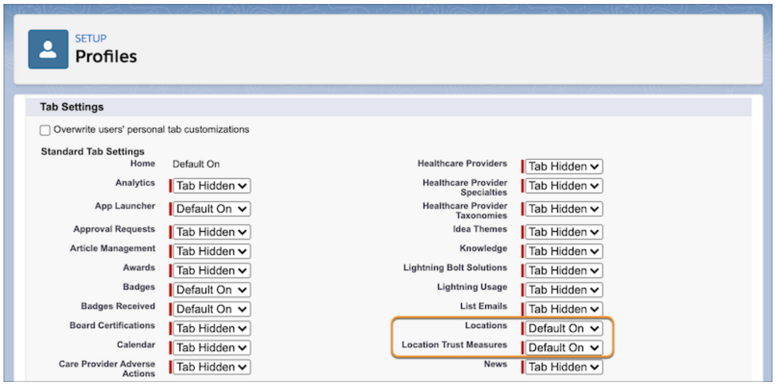
1. Open **Setup**, and click **Users** > **Profiles**.
2. Locate the Identity User profile, and click **Clone**.
3. Name your new profile `Trust Card Manager`.
4. Under Custom Settings:



   a. Keep the **Visible** box selected, and select the **Default** box for Trust Card (standard_TrustCard) (1). Default ensures that the Trust Card app is the first thing the user sees upon login.

   b. To make it invisible to the user, deselect the **Visible** box for App Launcher (standard_AppLauncher) (2).

5. Under Tab Settings:



a. Make sure that Locations is set to **Default On**.

b. Make sure that Location Trust Measures is set to **Default On**.

6. Save your changes.

Add a New User with the Trust Cards Manager User Profile

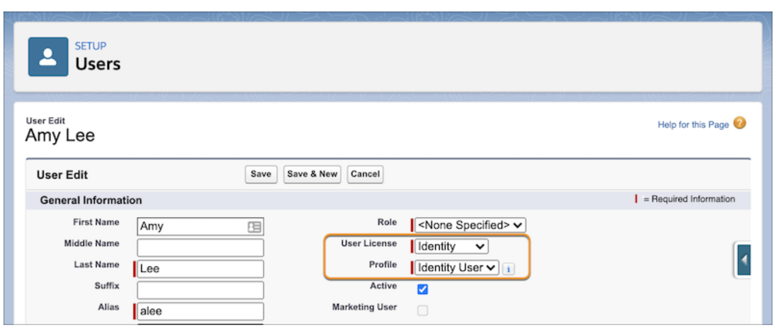
If your trust cards manager isn't a Salesforce user, follow these instructions to add them. Apply the Trust Cards Manager user profile so that they have visibility into the feature. Apply the Trust Cards Manager permission set so that they can create trust cards.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

1. Open **Setup**, and click **Users** > **Users**.
2. Click **New User**.
   a. Fill in the required fields.
   b. For User License, select **Identity**.
   c. For Profile, select **Trust Card Manager**.



   d. Generate a new password, and notify the user immediately.

3. Save your changes.

Assign the Trust Card Manager Permission Set to a User

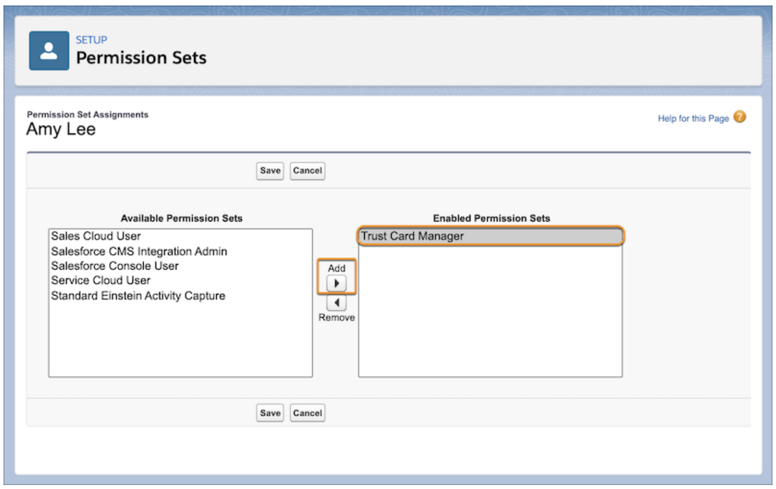
EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

The Trust Card Manager permission set lets users view locations; create, read, edit, and delete trust measures; and preview your location's Digital Trust Card. To turn a user into a trust card manager, add the permission set to their user profile.

1. Open **Setup**, and click **Users** > **Users**.
2. To open user settings, click the full name of your user.
3. Scroll down to Permission Set Assignments, and click **Edit Assignments**.
4. Under Available Permission Sets, highlight the **Trust Card Manager** permission set.
5. To move the Trust Card Manager permission set to the Enabled Permission Set box, click **Add**.



6. Save your changes.
7. Trust Card Manager appears under Permission Set Assignments and under Permission Set License Assignments.

Assign a Digital Trust Card Location to a Trust Card Manager

EDITIONS

Available in: Lightning Experience

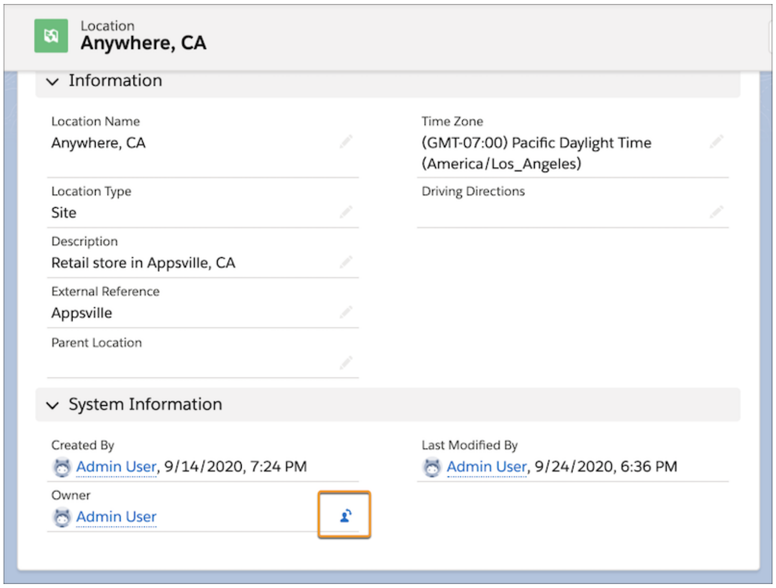
Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

By default, you own any trust card location that you create. To allow a location manager to create a unique trust card for their location, change the trust card location's owner. Only Admins can create trust card locations.

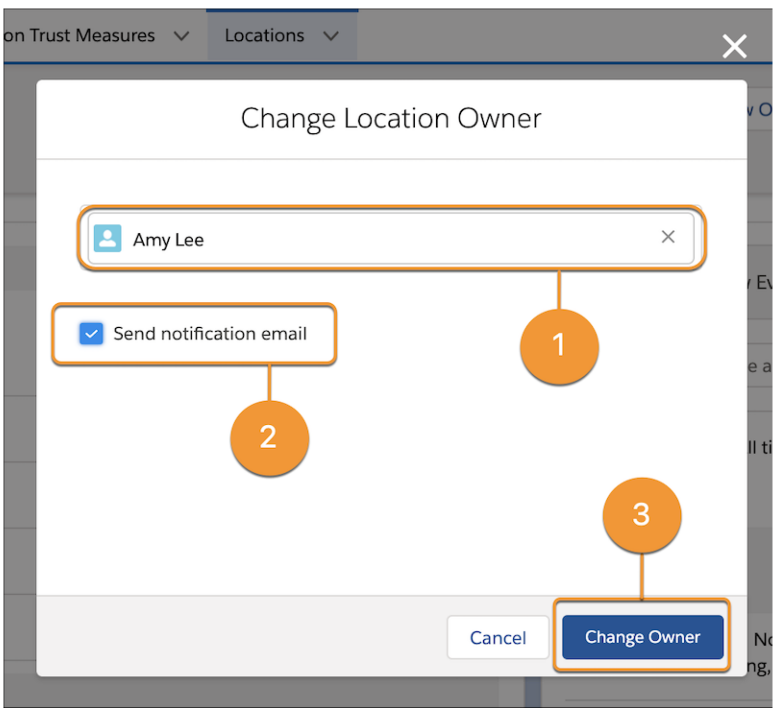
Any user with the Trust Card Manager permission set can create location trust measures for the location after the location is assigned to them.

To reassign the owner of a location:

1. Launch **Trust Cards** from the App Launcher.
2. Click the **Locations** tab.
3. Click to open the location you want to reassign.
4. Under System Information, click the person icon next to the Owner field.



5. Fill out the Change Location Owner form:



   a. Select a new owner from the dropdown menu (1).
   b. To notify them of the change, check the box (2).
   c. Click **Change Owner** (3).

6. Under System Information, verify that the Owner field reflects the new owner.

Create and Publish a Digital Trust Card on Your Website

Develop a strategy for your trust cards by studying government guidance. Then create location trust measures to reflect the steps you take to keep your customers safe in your business location. Publish these trust measures to your website as a trust card.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

USER PERMISSIONS

To view locations; create, read, edit, and delete trust measures; and preview your location's trust card:

- Trust Card Manager permission set

Define Your Trust Cards Strategy as a Retail Store Manager

Digital Trust Cards illustrate important steps you take to safely reopen your business. Add a trust card to your website to give your customers peace of mind in these uncertain times. Before you publish your trust card, take the time to identify stakeholders, study government guidelines, and craft your message.

Define Your Digital Trust Cards Strategy as a Hotel Manager

Trust cards illustrate important steps you take to safely reopen your business. Add a trust card to your website to give your customers peace of mind in these uncertain times. Before you publish your trust card, take the time to identify stakeholders, study government guidelines, and craft your message.

Define Your Digital Trust Cards Strategy as an Entertainment Venue Manager

Trust cards illustrate important steps you take to safely reopen your business. Add a trust card to your website to give your customers peace of mind in these uncertain times. Before you publish your trust card, take the time to identify stakeholders, study government guidelines, and craft your message.

Create a Location Trust Measure

A trust measure tells your customers a step that you take to keep them safe during COVID. You must be the owner of a trust card location to create a trust measure.

Preview Your Digital Trust Card

The trust card preview window serves two purposes. First, an admin can generate a code snippet to embed the trust cards feature on your website. Second, a trust card manager can see what their unique trust card looks like when it's displayed on your website.

Define Your Trust Cards Strategy as a Retail Store Manager

Digital Trust Cards illustrate important steps you take to safely reopen your business. Add a trust card to your website to give your customers peace of mind in these uncertain times. Before you publish your trust card, take the time to identify stakeholders, study government guidelines, and craft your message.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

USER PERMISSIONS

To view locations; create, read, edit, and delete trust measures; and preview your location's trust card:

- Trust Card Manager permission set

Identify Your Stakeholders

Who can help develop a plan to keep teams and customers safe as your business reopens? Make a list of decision-makers. Work with your internal teams to promote accountability and support each other in keeping trust cards aligned with COVID guidance. Designate at least one person to routinely update your business' trust cards as the national and local guidance for COVID safety evolves.

Example: Samantha Wilson, manager of the Customer 360 Clothing Co. retail store in Anywhere, CA, assembles her team of stakeholders. Samantha partners with the national Customer 360 Clothing Co. chain's retail manager, Rita Summers, for oversight and accountability. To create and update the trust card in Salesforce, Samantha also partners with her own store's operations manager, Jack Wong.

Study Your Government's Guidance, and Choose the Measures You'll Follow

Read the guidance from your local and federal government. Identify safety directives for reopening your business during COVID. COVID guidelines can change frequently, so remember to update your trust cards when they do.

Example: Samantha and Jack study national COVID guidance on how retail stores can reopen safely, and they review their local Anywhere, CA county guidelines for keeping customers safe. They work with Rita to align their corporate guidelines about inclusion and social responsibility during COVID.

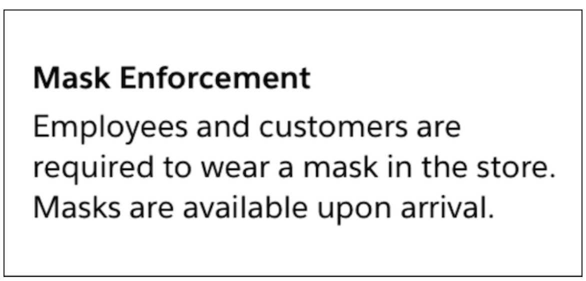
There are many more steps the team will take behind the scenes to ensure employee and building safety. Samantha and Jack identify four customer-facing measures to display on their trust card for the Anywhere, CA location:

1. Mask Enforcement: Employees and customers are required to wear a mask in the store. Masks are available upon arrival.
2. Reduced Capacity: Reduced in-store capacity and mobile app for curbside pickup, returns, and contactless purchases.
3. Deep Cleaning: Routine disinfecting of merchandise and common surfaces. No fitting rooms, nightly deep cleaning, and hand-sanitizer stations.
4. Social Distancing: Floor markers to maintain social distance, one-way aisles, partitions, and separate entrances and exits.

Write Your Trust Measures

Write a title and description for each trust measure you take to enforce customer safety during COVID. Grab the audience's attention by making your descriptions clear and concise. To stay within the character limits, focus on actions, not fluffy adjectives. The title can be up to 40 characters, and the description can be up to 255 characters.

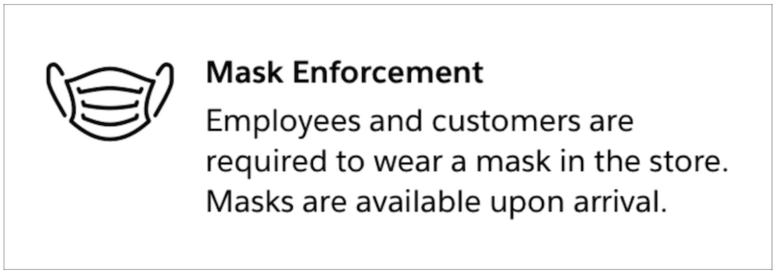
Example: Samantha and Jack don't allow customers into the store without wearing a mask. Employees must also always wear a mask. Their trust measure title and description are direct. They work with their developer resources to upload their own branded fonts:



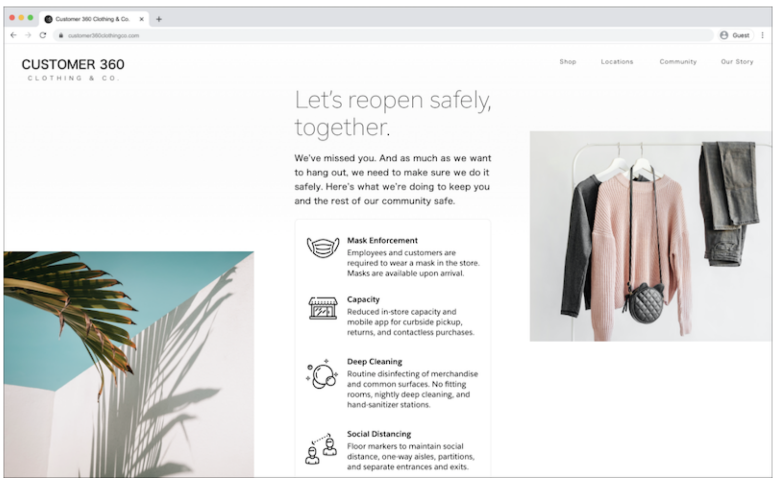
Design Your Trust Measure Icons

Design an icon to illustrate each trust measure. Icons help attract the eye of your audience. Icons demonstrate your brand's alignment with COVID safety.

Example: The Customer 360 Clothing & Co brand loves simple lines and bright neon colors. Samantha and Jack work with their brand designer to draw a logo for each of their trust measures. The Mask Enforcement icon is a face wearing a mask:



The resulting trust card, with all trust measures written and designed, looks like this:



Define Your Digital Trust Cards Strategy as a Hotel Manager

Trust cards illustrate important steps you take to safely reopen your business. Add a trust card to your website to give your customers peace of mind in these uncertain times. Before you publish your trust card, take the time to identify stakeholders, study government guidelines, and craft your message.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

USER PERMISSIONS

To view locations; create, read, edit, and delete trust measures; and preview your location's trust card:

- Trust Card Manager permission set

Identify Your Stakeholders

Who can help develop a plan to keep teams and customers safe as your business reopens? Make a list of decision-makers. Work with your internal teams to promote accountability and support each other in keeping trust cards aligned with COVID guidance. Designate at least one person to routinely update your business' trust cards as the national and local guidance for COVID safety evolves.

Example: Katie Jones, manager of the Platform Hotel in Anywhere, CA, assembles her team of stakeholders. Katie partners with the national Platform Hotels chain manager, Sam Montoya, for oversight and accountability. To create and update the trust card in Salesforce, Katie also partners with her own hotel's operations manager, Emily Nguyen.

Study Your Government's Guidance, and Choose the Measures You'll Follow

Read the guidance from your local and federal government. Identify safety directives for reopening your business during COVID. Remember that COVID guidelines can change frequently, so prepare your team to update your trust cards as guidelines change.

Example: Katie and Emily study national COVID guidance on how hotels can reopen safely, and they review their local Anywhere, CA county guidelines for keeping customers safe. They work with Sam to align with their corporate guidelines around inclusion and social responsibility during COVID.

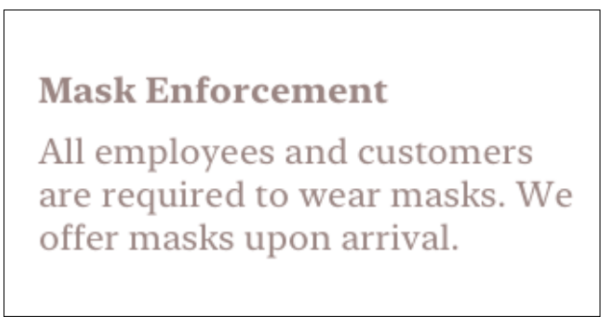
There are many more steps the team takes behind the scenes to ensure employee and building safety. Katie and Emily identify four customer-facing measures to display on their trust card for the Anywhere, CA location:

1. Mask Enforcement: All employees and customers are required to wear masks. We offer masks upon arrival.
2. Routine Disinfecting: Hand-sanitizer stations in public spaces. Routine disinfecting of common areas.
3. Social Distancing: Floor markers, clear partitions at front desks, and elevator and staircase queue management.
4. Deep Room Cleaning: Routine deep cleaning of guests' rooms and room vacancy between guests.

Write Your Location Trust Measures

Write a title and description for each trust measure you take to enforce customer safety during COVID. Grab the audience's attention by making your descriptions clear and concise. To stay within character limits, focus on actions, not fluffy adjectives. The title can be up to 40 characters, and the description can be up to 255 characters.

Example: Katie and Emily don't allow customers into the hotel without wearing a mask. Employees must also always wear a mask. Their trust measure title and description are direct. They work with their developer resources to upload their own branded fonts:

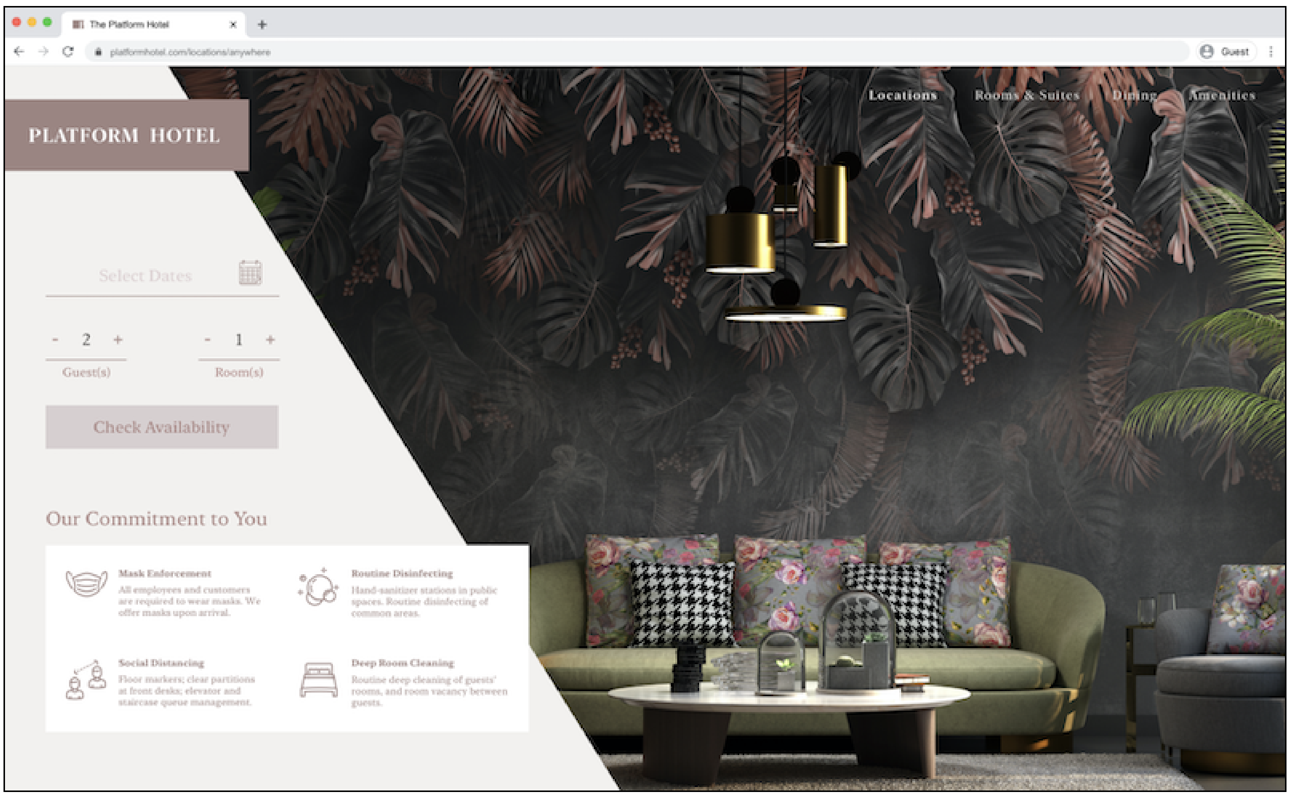


Design Your Trust Measure Icons

Design an icon to illustrate each trust measure. Icons help attract the eye of your audience. Icons demonstrate your brand's alignment with COVID safety.

Example: The Platform Hotels' brand loves simple lines and bright neon colors. Katie and Emily work with their brand designer to draw a logo for each of their trust measures. The Mask Enforcement icon is a person wearing a purple mask:

The resulting trust card, with all trust measures written and designed, looks like this:



Define Your Digital Trust Cards Strategy as an Entertainment Venue Manager

Trust cards illustrate important steps you take to safely reopen your business. Add a trust card to your website to give your customers peace of mind in these uncertain times. Before you publish your trust card, take the time to identify stakeholders, study government guidelines, and craft your message.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

USER PERMISSIONS

To view locations; create, read, edit, and delete trust measures; and preview your location's trust card:

- Trust Card Manager permission set

Identify Your Stakeholders

Who can help develop a plan to keep customers safe as your business reopens? Make a list of decision-makers. Work with your internal teams to promote accountability and support each other in keeping trust cards aligned with COVID guidance. Designate at least one person to routinely update your business' trust cards as the national and local guidance for COVID safety evolves.

Example: Carlos Mendoza, manager of the C.R.M Golf Club in Anywhere, CA, assembles his team of stakeholders. Carlos partners with Sofia Hernandez, owner of the C.R.M. Golf Club chain, for oversight and accountability. Carlos also partners with his own local club's operations manager, Jackie Wilson, to create and update the trust card in Salesforce.

Study Your Government's Guidance, and Choose the Measures You'll Follow

Read the guidance from your local and federal government. Identify safety directives for reopening your business during COVID. Remember that COVID guidelines change frequently, so make sure that your team updates your trust cards as guidelines change.

Example: Carlos and Jackie study national COVID guidance on how outdoor golf courses and tennis courts can reopen safely, and they review their local county guidelines for keeping customers safe. They work with Sofia to align with the C.R.M. Golf Club chain's guidelines for inclusion and social responsibility during COVID.

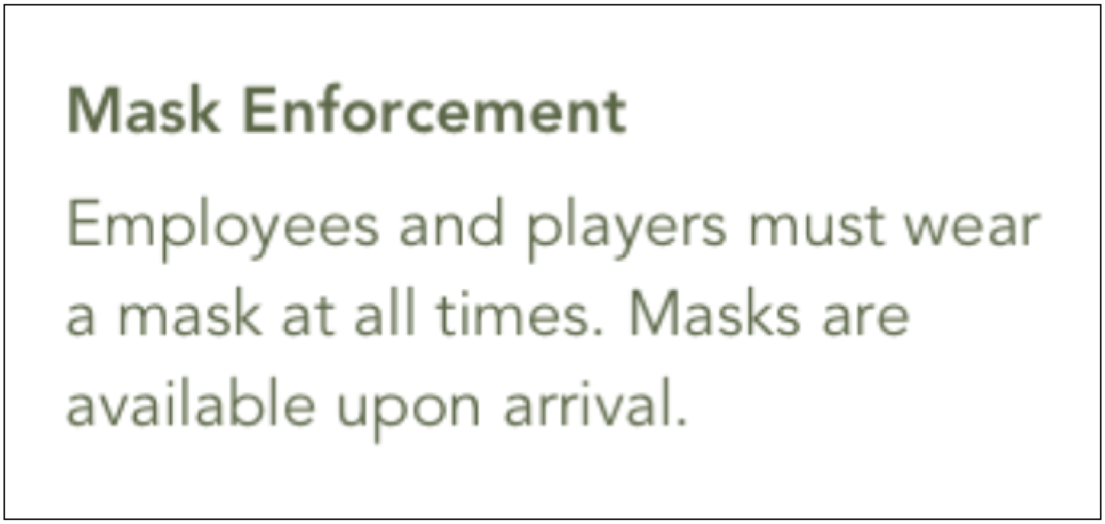
There are many more steps the team will take behind the scenes to ensure employee and building safety. Carlos and Jackie identify four customer-facing measures to display on their trust card for the Anywhere, CA location:

1. Mask Enforcement: Employees and players must wear a mask at all times. Masks are available upon arrival.
2. Routine Disinfecting: Hand sanitizer stations. Continuously disinfect high-touch surfaces. Raised holes for contactless ball retrieval.
3. No Equipment Rentals: Bring your own golf clubs and water. No rentals or free multi-use objects like towels, ball-washers, or scorecards with pencils.
4. Social Distancing: Max four players per group. No more than one group per hole. Extended length between tee times. No tournaments or caddies.

Write Your Location Trust Measures

Write a title and description for each trust measure you take to enforce customer safety during COVID. Grab the audience's attention by making your descriptions clear and concise. To stay within the character limits, focus on actions, not fluffy adjectives. The title can be up to 40 characters, and the description can be up to 255 characters.

Example: Carlos and Jackie don't allow customers into the hotel without wearing a mask. Employees must also always wear a mask. Their trust measure title and description are direct. They work with their developer resources to upload their own branded fonts:

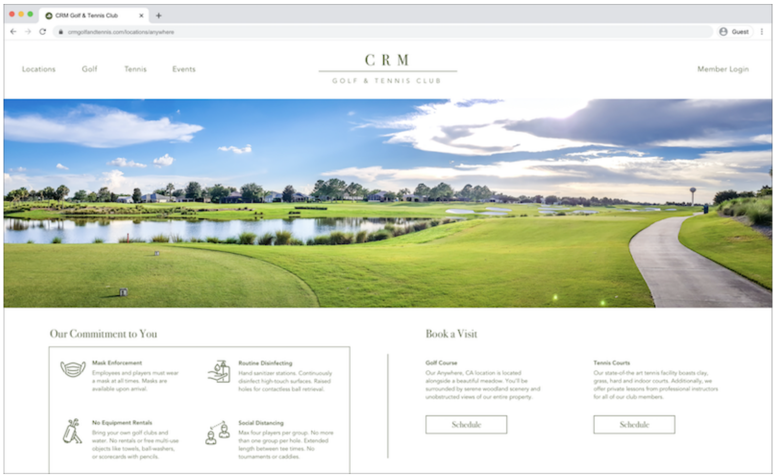


Design Your Trust Measure Icons

Design an icon to illustrate each trust measure. Icons help attract the eye of your audience. Icons demonstrate your brand's alignment with COVID safety.

Example: The C.R.M Golf Club brand loves simple lines and a green and white color scheme. Carlos and Jackie work with their brand designer to draw a logo for each of their trust measures. The Mask Enforcement icon is a person wearing a green and white mask:

The resulting trust card, with all trust measures written and designed, looks like this:



Create a Location Trust Measure

A trust measure tells your customers a step that you take to keep them safe during COVID. You must be the owner of a trust card location to create a trust measure.

A trust card consists of one location and one or more trust measures.

The location represents a retail store, hotel, or other physical space that your business occupies. A trust measure represents a step you take to keep your customers safe when they visit a particular location. We recommend that you create 4–6 trust measures per location.

To create a trust measure:

1. Launch **Trust Cards** from the App Launcher.
2. Click the **Location Trust Measures** tab.
3. Click **New**.
4. Fill in the required fields:

EDITIONS

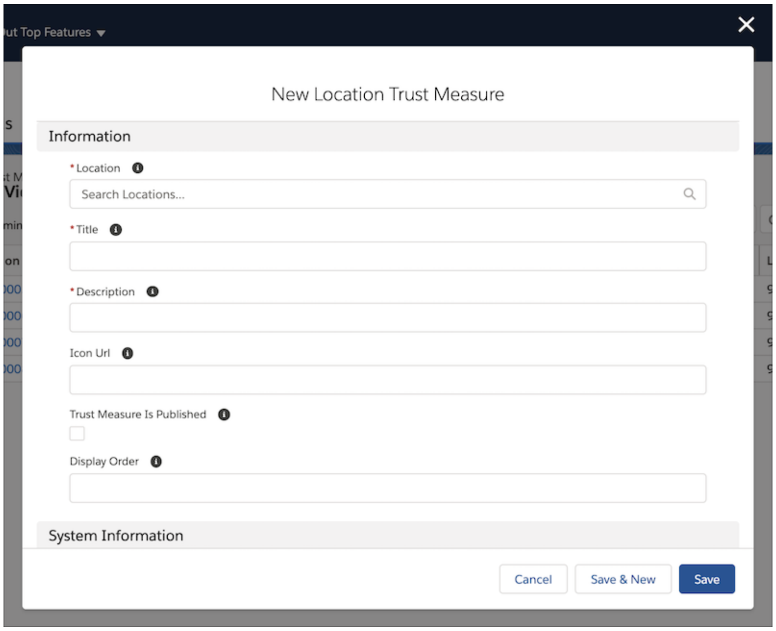
Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

USER PERMISSIONS

To view locations; create, read, edit, and delete trust measures; and preview your location's trust card:

- Trust Card Manager permission set



   a. Location: Choose the location where you want this trust measure to display. The field isn't customer-facing.
   b. Title: Summarize a step you take to keep customers safe. The field is visible to customers. In this example, we enter Mask Enforcement. You're limited to 40 characters when writing a trust measure's title.
   c. Description: To clarify the title, add additional information here. The field is also customer-facing. In this example, we enter *`Employees and Customers must wear a mask at all times`*. You're limited to 255 characters when writing a trust measure's description.

5. Fill in any non-required fields you'd like:
   a. Icon URL: To illustrate your trust measure with a branded icon (recommended), create the icon, host it on your own site, and add the URL to this field.
   b. Trust Measure is Published: To make this trust measure appear live on your trust card for this location, check this box.
   c. Display Order: Choose where this trust measure appears in your one-column, two-column, banner, or custom trust card layout. In this example, we use a two-column layout and set this trust measure as Display Order 1. That means it's the first trust measure displayed, from left to right, in the banner.
6. Save your changes.
7. To create more trust measures for this location, repeat these steps. We recommend creating 4–6 trust measures.

Preview Your Digital Trust Card

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Performance** Editions

USER PERMISSIONS

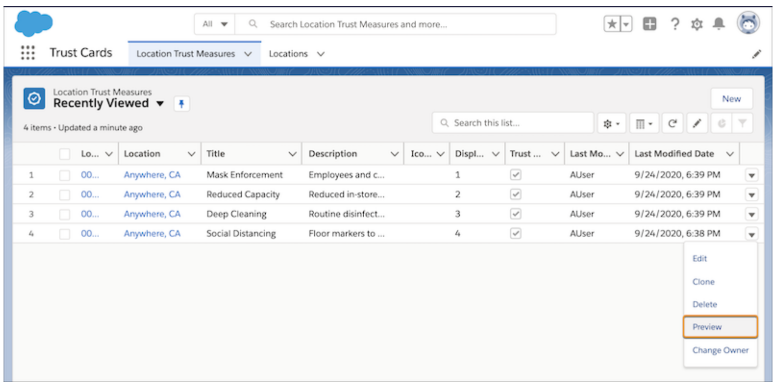
To view locations; create, read, edit, and delete trust measures; and preview your location's trust card:

- Trust Card Manager permission set

The trust card preview window serves two purposes. First, an admin can generate a code snippet to embed the trust cards feature on your website. Second, a trust card manager can see what their unique trust card looks like when it's displayed on your website.

To generate the trust cards code snippet for your website (as an admin) or preview your trust card layout (as a trust card manager):

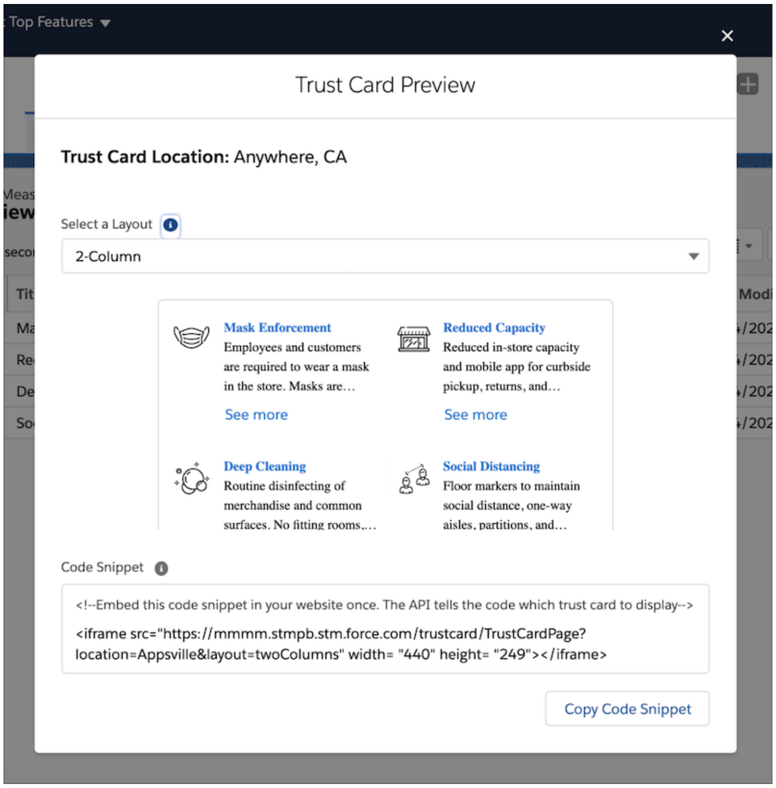
1. Launch **Trust Cards** from the App Launcher.
2. Click the **Location Trust Measures** tab.
3. Click the dropdown menu icon to the right of a published trust measure, and select Preview.



4. Select your preferred layout from the Trust Card Layout dropdown menu. The system automatically saves this change.

   If you see a Custom layout option, it means that your admin or developer added custom CSS to your website for your trust cards. Only choose Custom as instructed by your admin.

5. As a trust card manager, you can preview how your layout highlights your trust measures. If an admin already embedded the code on your website, you're all set. . The external resource field on your trust card's location lets the code know where to display this unique trust card.
6. As an admin adding the code snippet to your website for the first time, to save this code, click **Copy Code Snippet**



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7. To embed this code on your website, work with your developer resource.

Control Customer Flow with Queue Management

Bring customers back to your business safely and efficiently. Let customers join a digital queue, and notify them when it's their turn to enter.

Install and Configure Queue Management
Queue Management makes it easy to track your business' occupancy and regulate customer flow. After a guest joins the digital queue, it uses Broadcast Messaging to text them when it's their turn to enter. We walk you through the steps to set up both features.

Set Up Locations and Sublocations
To create and manage queues, first, set up locations and sublocations for your business. We recommend creating a location for the physical address of your facility. Then, use sublocations to designate spaces within your business that require their own queue, like a lobby or cafe.

Enable Digital Experiences for Queue Management
Enabling Digital Experiences is the first step to creating Experience Cloud sites.

Create a Visitor Sign-Up Form
Let patrons join a queue quickly and easily with a custom sign-up form. After you install the Queue Management managed package from the AppExchange, follow these steps to create a customized sign-up experience for your queues.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**and**Unlimited** editions

USER PERMISSIONS

To set up Queue Management:

- Queue Management Admin permission set

Get Started with Queue Management

To keep employees and guests safe, start using Queue Management.

Install and Configure Queue Management

Queue Management makes it easy to track your business' occupancy and regulate customer flow. After a guest joins the digital queue, it uses Broadcast Messaging to text them when it's their turn to enter. We walk you through the steps to set up both features.

USER PERMISSIONS

To set up Queue Management:

- Queue Management Admin permission set

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

Add Queue Management Users

Invite your team to use Queue Management. Per license, there are two Facility Manager users and 18 Queue Managers.

Add Facility Admins

A facility admin has full access to Queue Management data. Only create extra queue facility admins if your organization requires them.

Set Up Broadcast Messaging

Queue Management requires Broadcast Messaging to tell parties when it's their turn to enter. Only admins can complete Broadcast Messaging setup and begin saving Queues and Queue messaging templates.

Add Queue Management Users

Invite your team to use Queue Management. Per license, there are two Facility Manager users and 18 Queue Managers.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

User Permissions Needed

To create permission sets:	Manage Profiles and Permission Sets
To assign permission sets:	Assign Permission Sets
To create users:	Manage Internal Users

1. From Setup, in the Quick Find box, enter `Users`, then select **Users**.
2. Click **New User**.

   Important: The username must be unique across all Salesforce orgs. The username must be in an email address format, such as jane@salesforce.com. The email address used for your username doesn't have to function.

3. In the User License field, select **Salesforce Platform**.
4. In the Profile field, select the **Standard Platform User** profile or similar depending on your org's profile settings. Then, save your work.
5. At the top of the page, click **Permission Set Group Assignments** > **Edit Assignments**.
6. Add the appropriate **Permission Set Group**. For facility managers, add the **Facility Manager Access Group**. For managers, add **Queue Manager Access Group** .
7. Save your changes.

Get to Know the Queue Management Roles

The Queue Management package includes three permission sets: Admin, Facility Manager, and Queue Manager. These permissions affect how much someone can see and edit.

Assign Roles and Permissions

Queue Management comes with two permission sets: Facility Manager and Queue Manager. Give your team members the right permission to create, edit, and delete queues.

SEE ALSO:

Manage Users

Add a Single User

Get to Know the Queue Management Roles

The Queue Management package includes three permission sets: Admin, Facility Manager, and Queue Manager. These permissions affect how much someone can see and edit.

We defined the three personas that most businesses use to manage their queues.

Facility Admin:A Salesforce system admin who has full data access and can configure locations, sublocations, and queues.

Facility Manager:An operations manager who can see and edit locations, sublocations, and queues.

Queue Managers:An employee who can edit queues

We recommend creating admin personas first. Then, assign facility managers and hosts.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**,**Performance**, and **Unlimited** editions

Assign Roles and Permissions

Queue Management comes with two permission sets: Facility Manager and Queue Manager. Give your team members the right permission to create, edit, and delete queues.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**and**Unlimited** editions

User Permissions Needed	
To create permission sets:	Manage Profiles and Permission Sets
To assign permission sets:	Assign Permission Sets
To create users:	Manage Internal Users

1. From Setup, in the `Quick Find` box, enter *`Users`*, then select **Users**.
2. Select a user.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. To assign a permission set, select it under Available Permission Sets, and click **Add**. To remove a permission set assignment, select it under Enabled Permission Sets, and click **Remove**.
5. Save your changes.

Create a Queue Management Permission Set

To give access to standard objects, create the Queue Management permission set.

Set Sharing Rules for Queue Management Personas

Set sharing rules for Queue Management objects so that the right users see the right records.

SEE ALSO:

Create a User Role

Create a Queue Management Permission Set

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

USER PERMISSIONS

To create profiles and permission sets:

- Manage Profiles and Permission Sets

To give access to standard objects, create the Queue Management permission set.

Create a permission set with these settings.

- **Label:** `Queue Management Objects`
- **API Name:** `What's the API Name`
- **Description:** `View and edit standard objects related to the Queue Management license.`

Click **Object Settings**, and set the following permissions for each object listed:

Object	Permissions
Locations	**Object Permissions:** Read, Create, Edit, Delete **Field Permissions:** Read, Edit on all fields, where possible
Sublocations	**Object Permissions:** Read, Create, Edit, Delete **Field Permissions:** Read, Edit on all fields, where possible
Queues	**Object Permissions:** Read, Create, Edit, Delete **Field Permissions:** Read, Edit on all fields, where possible

Set Sharing Rules for Queue Management Personas

Set sharing rules for Queue Management objects so that the right users see the right records.

Use sharing rules to extend sharing access to users in public groups. Sharing rules give particular users greater access by making automatic exceptions to your org-wide sharing settings. We recommend creating public groups and sharing rules for each Queue Management persona, but set up data access in a way that works best for your company.

Before you use sharing rules to allow access at the record level, limit the default access for the organization. For example, the Location object is Public Read/Write, so set it to Private.

Now you can add sharing rules to grant access according to your requirements.

We recommend the following for sharing rules, but again, configure data access to work for your organization.

- To use Locations, a user needs Create/Read on Location.
- To create Queues, a user needs Create/ Read on Queues.
- To manage Queues, a user needs Read on Queues.

	Workplace Admin	Facility Manage	Queue Manager
Location	Read/Write all records	Read/Write all records	No access to Location object
Queue	Read/Write all records	Read/Write all records	Read access only

1. From Setup, in the **Quick Find** box, enter `Sharing`, then click **Sharing Settings**.
2. Next to Organization-Wide Defaults, click **Edit**.
3. In the Default Internal Access column, select **Private** for the Location object.
4. Save your changes.

SEE ALSO:

Sharing Rules

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**,**Performance**, and**Unlimited** editions

USER PERMISSIONS

To view roles and role hierarchy:
- View Roles and Role Hierarchy

To create, edit, and delete roles:
- Manage Roles

To assign users to roles:
- Manage Internal Users

Add Facility Admins

A facility admin has full access to Queue Management data. Only create extra queue facility admins if your organization requires them.

This step is optional. Only create extra system admins if required by your organization.

1. From Setup, in the Quick Find box, enter `Users`, then select **Users**.
2. Click **New User**.

   Important: The username must be unique across all Salesforce orgs. The username must be in the format of an email address, such as jane@salesforce.com. The email address used doesn't have to function. You can have the same email address associated with your account across multiple orgs.

3. In the User License field, select **Salesforce**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

USER PERMISSIONS

To assign permission sets:
- "Assign Permission Sets"

To create users:
- "Manage Internal Users"

4. In the Profile field, select the **System Administrator** profile or similar depending on your org's profile settings. Then, save your work.
5. At the top of the page, click **Permission Set Group Assignments** > **Edit Assignments**.
6. Select **Facility Admin Group**, and click to add it to the enabled permission sets. Then, save your work once more.

Set Up Broadcast Messaging

Queue Management requires Broadcast Messaging to tell parties when it's their turn to enter. Only admins can complete Broadcast Messaging setup and begin saving Queues and Queue messaging templates.

User Permissions Needed

To set up Broadcast Messaging:	Queue Management Admin permission set, Messaging User, and the"Send One-to-Many Messages" user permission
To save a Queue or update a Queue messaging template:	View Setup permission

SEE ALSO:

Set Up Broadcast Messaging

Set Up Locations and Sublocations

To create and manage queues, first, set up locations and sublocations for your business. We recommend creating a location for the physical address of your facility. Then, use sublocations to designate spaces within your business that require their own queue, like a lobby or cafe.

To get started, we recommend creating a location for your physical address.

1. From Setup, choose **New Location**.
2. Enter a name for the location.
3. Select or enter the type of location.
4. In Visitor Address, provide addresses based on locations or accounts.
5. Enter the longitude and latitude of the location and, if necessary, enter driving directions.
6. Provide the location time zone.
7. If the location is part of a chain, provide a parent location.
8. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

USER PERMISSIONS

To create Locations:

- Admin or Facility Manager permission set license

Add Queues to Locations

After you establish locations and sublocations, create queues to manage the customer flow.

Add Queues to Locations

After you establish locations and sublocations, create queues to manage the customer flow.

If your business has areas that have different occupancy requirements or frequently handles foot traffic, we recommend creating a queue for each sublocation. For example, a hotel with a lobby, pool, spa, and restaurant would create a sublocation for each area. Then the hotel would create a queue to manage the customer flow in each sublocation.

1. Click**New Queue** from the **Queues**dropdown.
2. Enter a name for the queue.
3. Fill out the required and any other relevant fields. Then, save your work.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

USER PERMISSIONS

To create Queues:

- Admin or Facility Manager permission set license

Enable Digital Experiences for Queue Management

Enabling Digital Experiences is the first step to creating Experience Cloud sites.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, then select **Digital Experiences** > **Settings**.

   Tip: If you don't see this menu, it's possible Digital Experiences aren't available for your Salesforce org. Contact your Salesforce account executive.

2. Select **Enable Digital Experiences**.
3. Enter a domain name for your sites, and click **Check Availability** to make sure that it's not already in use.

   We suggest that you use something recognizable to your users, such as your company name.

   Important: You can't change the domain name after you save it.

4. Click **Save**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**,**Performance**, and**Unlimited** editions

USER PERMISSIONS

To enable digital experiences:

- Customize Application

Create an Experience Cloud Site Page

Queue Management uses Experience Cloud sites to build a customer-facing form that feeds data directly into Salesforce. To get started, enable Digital Experiences first.

SEE ALSO:

Enable Digital Experiences

Create an Experience Cloud Site Page

Queue Management uses Experience Cloud sites to build a customer-facing form that feeds data directly into Salesforce. To get started, enable Digital Experiences first.

> Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

Creating a customized visitor experience takes time and a step-by-step approach. For a detailed explanation, refer to the Queue Management Visitor Experience Implementation Guide.

> Note: To send texts to customers with Broadcast Messaging, the visitor experience uses a Messaging end user (MEU) record. An MEU is created along with new Queued Parties with a mobile phone number. When Queued Party record is deleted, the MEU is not automatically removed from Salesforce. The admin can manually delete MEUs or create a process with Process Builder to remove the records.

SEE ALSO:

- Queue Management Visitor Experience Implementation Guide
- MessagingEndUser SOAP API Developer Guide
- Protect Customer Data and Privacy in Messaging

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

USER PERMISSIONS

To create digital experiences:

- Create and Set Up Experiences and View Setup and Configuration

Create a Visitor Sign-Up Form

Let patrons join a queue quickly and easily with a custom sign-up form. After you install the Queue Management managed package from the AppExchange, follow these steps to create a customized sign-up experience for your queues.

> Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

> Note: Digital Experiences must be enabled to create a Visitor Sign-Up form.

Enable Security Code Messages for Queued Parties
Use a Experience Cloud site page to create a customized sign-up form.

Build a Customized Experience Cloud Site
Use a Experience Cloud site page to create a customized sign-up form.

Relate an Experience Cloud Site Page to Your Location
After you create a custom site for your sign-up form, it's time to relate the form to a Location and its Queues. Then, visitors can sign up for a specific queue when they click the link.

Set Up ReCaptcha
Make sure your sign-up form isn't getting spammed or misused by adding reCaptcha authentication.

USER PERMISSIONS

To set up Queue Management and create or edit Queues:

- Queue Management Admin permission set

To create, customize, and publish an Experience Cloud site:

- Create and Set Up Experience AND View Setup and Configuration

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

Enable Security Code Messages for Queued Parties

Use a Experience Cloud site page to create a customized sign-up form.

> **Note:** In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

1. From Setup, go to the Object Manager. Click **Queued Party**.
2. Click **Fields & Relationships** and select **Security Code**.
3. Click **Set Field-Level Security**.
4. Ensure that the check box for **Visible** is selected.
5. Click the **Save**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**,**Performance**, **Unlimited**, and**Developer**editions

USER PERMISSIONS

To create, customize, and publish an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To set up Queue Management and create or edit Queues:

- Queue Management Admin permission set

Build a Customized Experience Cloud Site

Use a Experience Cloud site page to create a customized sign-up form.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

1. From Setup enter **All Sites** in the `Quick Find` box.
2. Choose the **Build Your Own** template.
3. Create a name for your site. Use the name to complete your URL.
4. Click **Create**.
5. Click the **Components** lightning bolt icon on the left navigation. Under Custom Components, select **Queue Management Visitor Experience** and drag it to the builder canvas.
6. Click the **Settings** gear icon. Select the checkbox that allows the public to access the site.
7. Then, click **Visitor Experience Profile** under the Guest User Profile header.
8. Next, select the **Enabled Apex Class Access** tab.
9. Add the following Apex classes to the **Enabled Apex Class** list *EstimatedWaitTimeController, FormInitializationConroller, QueueSelectorController,Recaptcha, VisitorFlowsController*.
10. Return to the Experience builder and click **Publish**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**,**Performance**, **Unlimited**, and**Developer** editions

USER PERMISSIONS

To create, customize, and publish an Experience Cloud site:
- Create and Set Up Experiences AND View Setup and Configuration

To set up Queue Management and create or edit Queues:
- Admin or Facility Manager permission set license

Relate an Experience Cloud Site Page to Your Location

After you create a custom site for your sign-up form, it's time to relate the form to a Location and its Queues. Then, visitors can sign up for a specific queue when they click the link.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

1. Open the Queue Management App from the App Switcher.
2. Select a Location.

EDITIONS

Available in: Lightning Experience

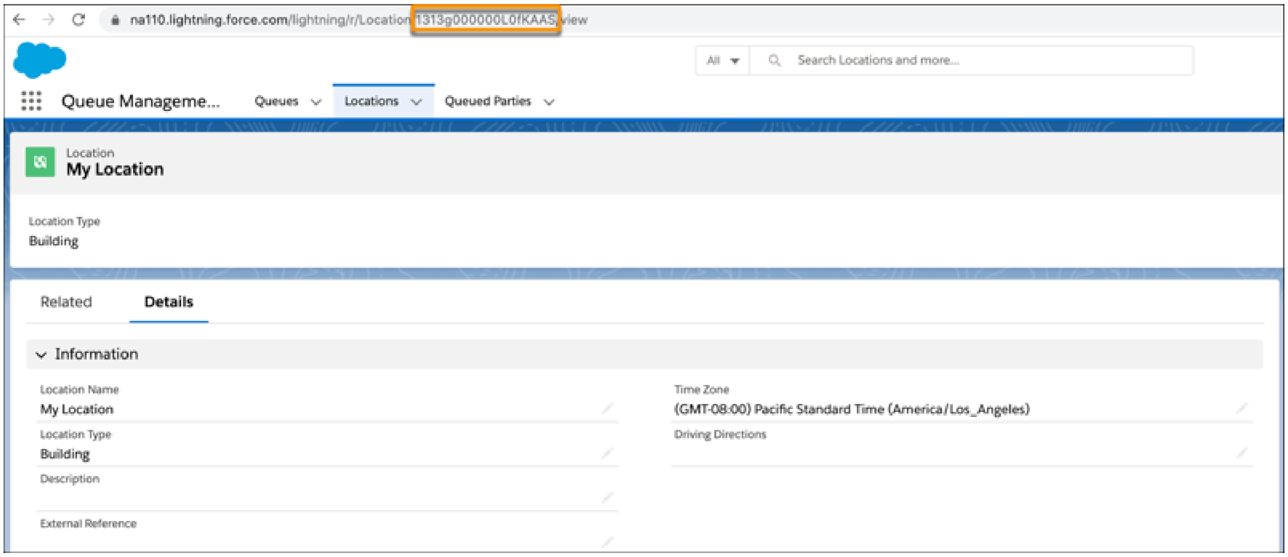
Available in: **Enterprise**,**Performance**, **Unlimited**, and**Developer** editions

USER PERMISSIONS

To create or edit Queues:
- Admin or Facility Manager permission set license

To create, customize, and publish an Experience Cloud site:
- Create and Set Up Experiences AND View Setup and Configuration

3. Copy the location ID from the URL in your search bar. The location id begins after `location/` and ends before



4. In a new tab, enter the URL for your new site. At the end of the URL, type `?locationId=` and paste the location id for the location. 

5. Select a queue.
6. Confirm the sign-up form works by filling in the required fields.
7. Use the security code from the text message you receive to remove yourself from the queue.

Set Up ReCaptcha

Make sure your sign-up form isn't getting spammed or misused by adding reCaptcha authentication.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

Get the Site Key and Secret Key from ReCaptcha

Go to the reCaptcha Admin Console and enter your Experience Cloud site's information. Generate a site key and secret key to create your customized reCaptcha authentication.

Add Markup and ReCaptcha Keys to Your Sign-Up Form

Add markup and Google's secret key to your Experience Cloud site.

Relax Security Settings and Add ReCaptcha

Allow important websites to have access to your Experience Cloud site. Publish your site with ReCaptcha authentication.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

To create Queues:

- Admin or Facility Manager permission set license

To create, customize, and publish an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

Get the Site Key and Secret Key from ReCaptcha

Go to the reCaptcha Admin Console and enter your Experience Cloud site's information. Generate a site key and secret key to create your customized reCaptcha authentication.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

1. Go to https://www.google.com/recaptcha.
2. Click **Admin Console**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

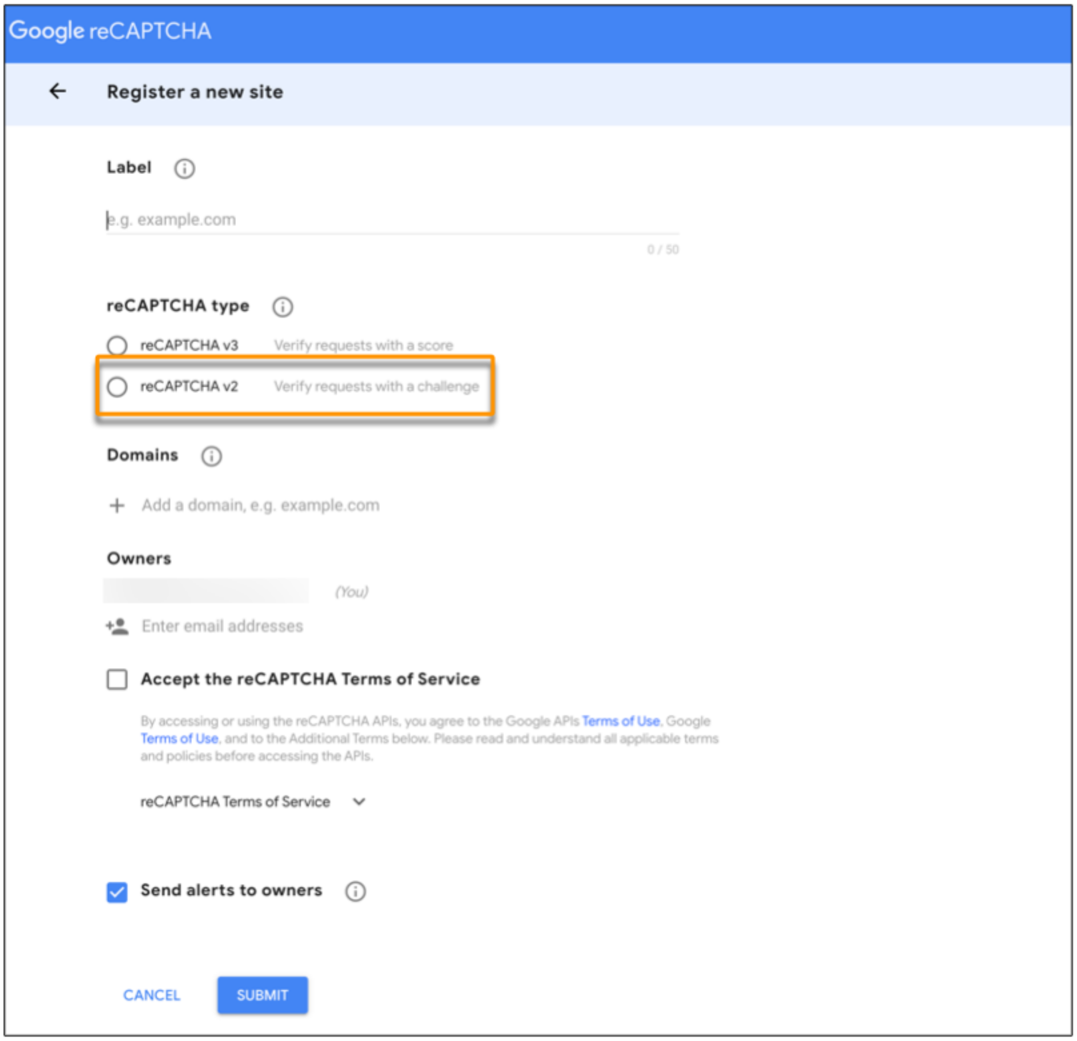
To create Queues:

- Admin or Facility Manager permission set license

To create, customize, and publish an Experience Cloud site:

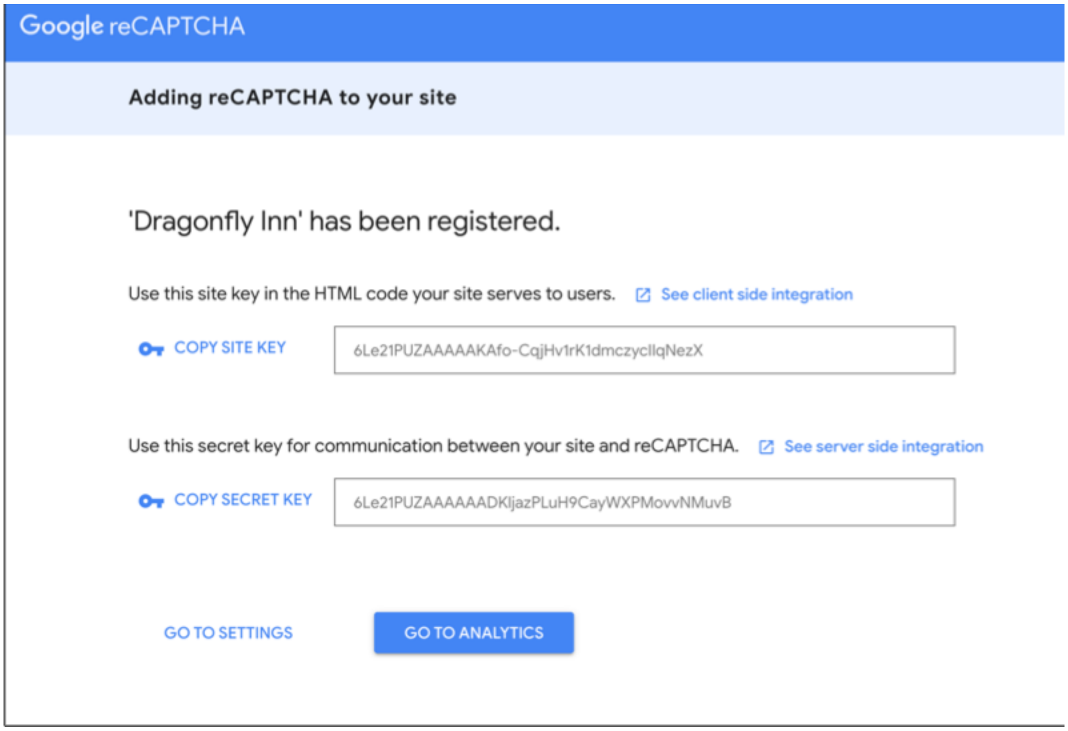
- Create and Set Up Experiences AND View Setup and Configuration

3. Enter a label for your ReCaptcha and select the V2 checkbox.



4. Add the URL for your site in the **Domain** section.

5. Accept the terms of service and click **Submit**. Copy the Site Key and Secret Key that Google generates.



Add Markup and ReCaptcha Keys to Your Sign-Up Form

Add markup and Google's secret key to your Experience Cloud site.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

1. Navigate to Setup and enter `All Sites` in the Quick Find box.
2. Click **Builder** next to the site that will host the visitor sign-up form.
3. Click the gear icon and click **Edit Head Markup**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

To create Queues:

- Admin or Facility Manager permission set license

To create, customize, and publish an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

4. Paste this code snippet into your **Head Markup** section. Substitute the site key that Google gave you for the site key line in the snippet.

```
<!--reCaptcha v2 Checkbox-->
<script>

    var verifyCallback = function(token) {
        window.parent.document.dispatchEvent(new CustomEvent('grecaptchaVerified',
{'detail': {response: token}}));
    };
    var expireCallback = function() {
        window.parent.document.dispatchEvent(new Event('grecaptchaExpired'));
    };
    var errorCallback = function() {
        window.parent.document.dispatchEvent(new Event('grecaptchaError'));
    };
    document.addEventListener('grecaptchaRender', function(e) {
        grecaptcha.render(e.detail.element, {
            'sitekey': '*6LeH8OEZAAAAAMi0TO4HCEgcO9fRTkryTroe13GZ*',
            'callback': verifyCallback,
            'expired-callback': expireCallback,
            'error-callback': errorCallback
        });
    });
    document.addEventListener('grecaptchaReset', function() {
        grecaptcha.reset();
    });
</script>
<script src='https://www.google.com/recaptcha/api.js?render=explicit' async
defer></script>
```

5. In the Settings section of your site, click **Security**. Choose **Relaxed CSP** from the security level dropdown.
6. For the Clickjack protection level set to **Allow Framing by Any Page**.
7. Add *`www.google.com`* and *`https://www.gstatic.com`*.
8. Click **CSP Trusted Sites** under Trusted Sites for Scripts.
9. In the CSP Trusted Site Definition page that opens up, add *`www.google.com`* as a Trusted Site. Save the changes.
10. Navigate to the Developer Console from Setup.
11. Click **File**>**Open**>**Classes**. Then, select **reCaptcha**.
12. Replace the **reCaptcha** site key in the code with the one that Google generated for you.
13. Click **Publish**.

Relax Security Settings and Add ReCaptcha

Allow important websites to have access to your Experience Cloud site. Publish your site with ReCaptcha authentication.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**,**Performance**, **Unlimited**, and**Developer** editions

USER PERMISSIONS

To create Queues:

- Admin or Facility Manager permission set license

To create, customize, and publish an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

> Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

1. In the Settings section of your site, click **Security**. Choose **Relaxed CSP** from the security level dropdown.
2. For the Clickjack protection level set to **Allow Framing by Any Page**.
3. Add `www.google.com` and `https://www.gstatic.com`.
4. Click **CSP Trusted Sites** under Trusted Sites for Scripts.
5. In the CSP Trusted Site Definition page that opens up, add `www.google.coom` as a Trusted Site. Click **Save**.
6. Navigate to the Developer Console from Setup.
7. Click **File**,**Open**,**Classes**, and select **Recaptcha**.
8. Add the Google site key from step 5 where it says **recaptchaSecretKey**.
9. Click **Publish**.

Get Started with Queue Management

To keep employees and guests safe, start using Queue Management.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

Best Practices for Queue Managers
Keep your guests safe by managing your queue and maintaining the recommended occupancy numbers.

Best Practices for Queue Managers

Keep your guests safe by managing your queue and maintaining the recommended occupancy numbers.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** editions

USER PERMISSIONS

To use Queue Management:
- Queue Management Facility Manager or Queue Manager permission set

Open, Close, or Pause a Queue

To change the status of a queue:

1. Click the dropdown arrow for Queue Status.
2. To reflect your queue status, select the open, closed, or paused option.

Check Guests In from the Queue

When a guest's name is at the top of your queue, checking them in is simple. To confirm their arrival, click **Check In** .

Remove Guests from the Queue

When a guest leaves, to reflect their departure, click **Remove One** .

You can also select the dropdown at the end of the row and click **Remove From Queue** .

Broadcast Messaging in Work.com

Send SMS messages to up to 2,000 recipients at once. You can send messages automatically with Process Builder or manually from your contact, person account, employee, or messaging user list views. Use Broadcast Messaging with Queue Management, Wellness Check, and Contact Tracing.

EDITIONS

Available in: Lightning Experience with the Digital Engagement add-on SKU

Available in: **Enterprise**, **Unlimited**, and **Developer** editions with Service Cloud or Sales Cloud

Queue Management

Send messages to customers in a queue to let them know when it's their turn. Broadcast Messaging is required for Queue Management.

Wellness Check

Send employees a link to health surveys, so they get a text message in addition to an email. You can also send messages manually to groups of employees from your list views when you have the `Send One-to-Many Messages` permission. Simply open the Employee tab or the Wellness Status components in Command Center to message your employees.

> Note: The Employee object doesn't have a Mobile Number field, so you must create a custom field. Then, you can create a process that automatically creates Messaging Users from your employee records.

Contact Tracing

Send patients a link to daily health assessments, so they get a text message in addition to an email. You can also manually send messages to person accounts from any person account list view when you have the `Send One-to-Many Messages` permission. For example, if you use the Contact Tracing Status component in Command Center, you can open your person accounts from the component and send messages.

SEE ALSO:

Control Customer Flow with Queue Management

Gather Data with Wellness Check

Set Up Daily Assessment Using Surveys

Explore the Work.com Trial Org

Sign up for a free Work.com trial org to check out the Salesforce apps that can help you get back to work safely.

The Work.com 30-day trial org is designed for experienced Salesforce admins who like to test new features. It includes preinstalled, partially configured managed packages and sample data. To set up and configure a Work.com trial, complete the required and optional trial org setup steps. If you're new to Salesforce, consider working with an experienced admin, developer, or partner to complete this process.

Contact your account executive for more information about accessing a trial org.

Note: The Work.com trial org is available in 35 languages. For a list of supported languages, see the Fully Supported and End-User language lists.

Required Work.com Trial Org Setup

Complete the required setup steps to use your Work.com trial org.

Optional Work.com Trial Org Setup

Extend and customize the capabilities of this Work.com trial by completing these optional setup steps.

Required Work.com Trial Org Setup

Complete the required setup steps to use your Work.com trial org.

Note: In the Spring '21 release, Community Cloud was renamed to Experience Cloud. As part of this rebranding effort, you can expect changes for both tools and terminology. For more information, see Enable Digital Experiences on page 6.

Use the Work.com Setup app in your trial org to help guide you through the process. If you can't find the Setup app in your trial org, follow these steps.

1. If you haven't done so already, **Enable Digital Experiences**
2. **Publish Your Wellness Experience Cloud Site**
   a. From Setup, search for and select *All Sites*.
   b. Next to Wellness, click **Builder** to open your site.
   c. Click **Publish**.
3. **Define Shift Management App Settings**
   a. From App Launcher, search for and select *Shift Management Setup*.
   b. On the Shift Management Setup tab in Define App Settings, click **Setup**.
   c. Update the **Domain Name**.

   See also Complete the Recommended Setup for Shift Management.
4. **Download and Log in to the Salesforce Mobile App**

   Employees manage shifts and view the arrival pass in the Salesforce mobile app. To fully test Shift Management in this trial, install the Salesforce mobile app, and log in using a sample employee record. See also Shift Management Considerations.
5. **Update Location and Time Zone Settings**

For a consistent shift-planning and mobile experience, the trial org and all users must be set to your time zone. Click **Setup** and find **Company Information** to edit the org setting. Find and select **Users** to edit user settings individually. See also **Select Your Language, Locale, and Currency**.

6. **Configure Location Data**

   Wellness Surveys are sent to employees based on location. This only needs to be done one time immediately after signing up so that surveys work correctly.

   a. From App Launcher, search for and select `Command Center Settings.`.

   b. On the **Location Data and Permissions** tab, find Configure Location Data and click **Run**.

Now complete the optional Work.com trial setup to try more features in the org.

Optional Work.com Trial Org Setup

Extend and customize the capabilities of this Work.com trial by completing these optional setup steps.

1. **Configure Data Privacy Preferences and Responses**

   Configure data-privacy rules, policies, and triggered-automation routines to handle individuals who opt out of data sharing or storage with your organization. See also **Set Up Tracking and Storage of Certain Data Privacy Preferences**.

2. **Personalize Contact Tracing**

   The trial org includes examples of consent documents and life event categories used in contact tracing. We recommend updating the examples with your own consent documents and life events that follow your company's best practices and legal guidelines.

3. **Delete the Sample Data and Add Your Own**

   To use your own test data, review the existing employee and location records to understand the object structure. To delete sample data, click **Setup** > **Delete** > **Delete All Data**. Add or import data into Salesforce to add your own test records. **Don't add any real employee data.**

4. **Customize Who Sees What**

   This trial org is preconfigured with our recommended sharing rules for workplace planner personas. Customize the sharing rules to meet your organization's needs.

5. **Set Up Sales Enablement**

   Create and publish learning content with Sales Enablement (myTrailhead) to get everyone at your organization up to speed on your return-to-work policies and procedures. See also Sales Enablement (myTrailhead) for Learning and Wellness.

6. **Review the Documentation**

   Explore other configuration options and learn how to navigate by reviewing our Return to the Workplace with Work.comsetup and user guide. For developer guidance, see Extend Work.com with Custom Solutions. Use the Work.com Learning Map to navigate the Salesforce resources available for each step of your journey.