Emergency Response Management for Public Sector Admin Guide

Salesforce, Spring '24

'24

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EMERGENCY PROGRAM MANAGEMENT FOR PUBLIC SECTOR

Quickly deploy a single digital destination for constituents and communities to access emergency program information and incident updates. Use the Emergency Response Community site to feature different services and programs that are available to public agencies and hospitals, such as emergency supply requests. People can request permits for building access and apply for assistance programs like food delivery services. Using the mobile Inspection App field, responders can deliver emergency services quickly and efficiently. Businesses can use the site to request permits to reopen to the public. After the permit is approved, your inspector can use the Inspection App to verify that the site complies with local health and safety ordinances.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

Emergency Response Community

The pre-configured Emergency Response Community template makes it easy for citizens to request emergency assistance and get information when they need it most.
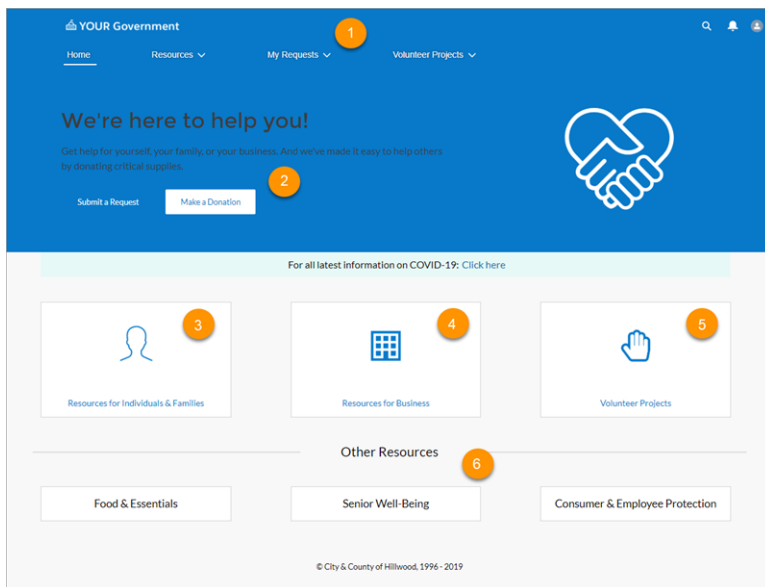
The Emergency Response Community is a hub for your community during an emergency. Citizens and businesses can check the status of existing requests (1) or donate emergency supplies (2). Individuals and families can submit requests for assistance with temporary housing, emergency supply delivery, and wellness checks. Employees can request a permit to access a building or obtain certification for training they've taken (3). Businesses can request a permit to reopen to the public or request critical supplies that enable them to keep employees and customers safe (4). With Volunteer Management, you can create volunteer projects and let people sign up for shifts to help during an emergency (5). And you can add other resources to keep your community informed and protected (6).

Citizens can fill out a simple online form to request supplies or delivery services. Businesses and other organizations can also request emergency supplies or reopening permits.

Emergency Response Console

Give your staff the power of the Emergency Response Console to triage and evaluate incoming requests from citizens or businesses.

From the Emergency Response Console's home page, your agency can quickly approve requests and then have a dispatcher schedule a delivery or an inspection.

Salesforce Maps and the Mobile Inspection App

Help is on its way in no time when your dispatchers use Salesforce Maps.
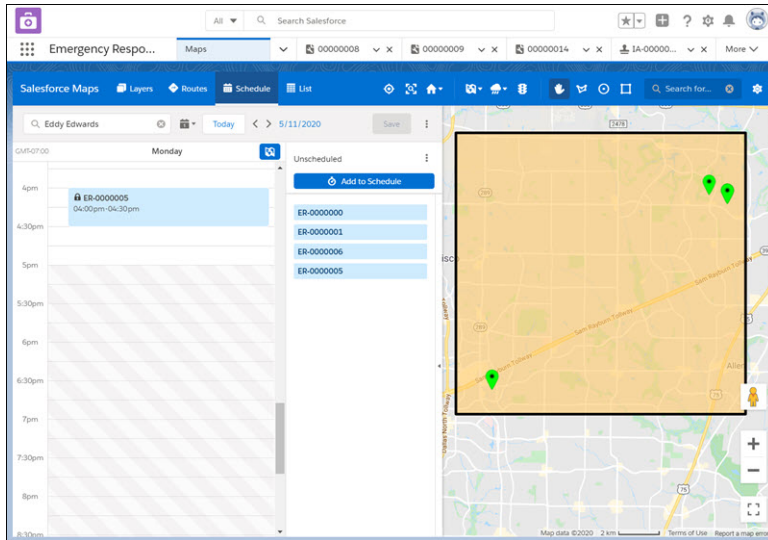
Salesforce Maps injects location intelligence into field operations to make emergency supply delivery more efficient. When an emergency event is created, the Schedule an Emergency Visit process starts a flow that creates the visit record, applies the action plan template, and creates tasks.
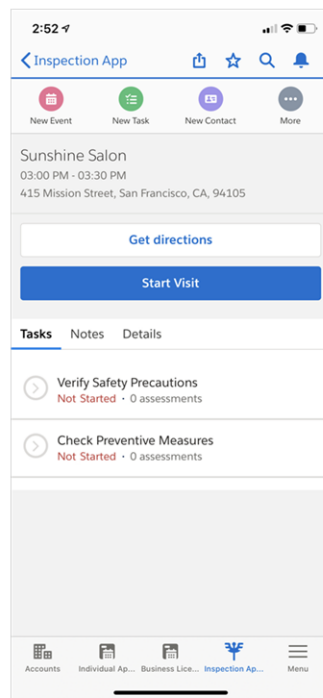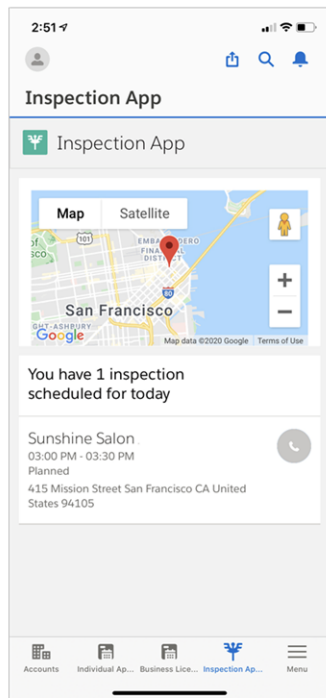
Your field responders can complete an inspection or a delivery right on their mobile phone. Contact information, directions, and a detailed accounting of their tasks are at their fingertips. When an inspection or a delivery and the associated tasks are finished, the inspector or field responder marks the visit as complete and begins the next assignment.

Grants Management

Grants Management helps you launch a Grantee Portal where grant seekers can find funding opportunities. From the portal, organizations can apply for funding, view their application status, and submit ongoing progress reports for awarded grants.

Once you've set up Grants Management, you can create a tile in the Emergency Response site template and link to the Grantee Portal.

Enable Person Accounts

Person accounts store information about individuals by combining certain account and contact fields into one record. Emergency Program Management uses person accounts for personas like individual citizens or patients.

Install the Emergency Program Management for Public Sector Packages

Install the Emergency Program Management for Public Sector packages in your org so that you can begin implementing features for your users.

Enable Person Accounts

Person accounts store information about individuals by combining certain account and contact fields into one record. Emergency Program Management uses person accounts for personas like individual citizens or patients.

🛇 **Important:** After Person Accounts is enabled, it can't be disabled. We recommend that you create a sandbox to preview how person accounts affect your Salesforce org.

1. From Setup, enter `Person Accounts` in the Quick Find box, and then select **Person Accounts**.

2. Go through the steps listed on the Setup page.

3. Turn on Person Accounts.

4. After Person Accounts is enabled, a person account record type is created. You can create additional record types for person account if needed.

5. To begin using person accounts in Health Cloud, from Setup, enter `Custom Settings` in the Quick Find box, then select **Custom Settings**.

6. In the list of custom settings, click **Manage** next to the Use Person Accounts custom setting.

7. Click **Edit** next to Use Person Account and select **Enable**.

8. Assign the person account record type to user profiles and the system administrator profile.

Install the Emergency Program Management for Public Sector Packages

Install the Emergency Program Management for Public Sector packages in your org so that you can begin implementing features for your users.

📝 **Note:** Before installing the Emergency Program Management for Public Sector managed package, assign the EmergencyResponseMgmt and ActionPlans permission sets to the System Admin user.

1. Install the managed package for Emergency Program Management for Public Sector using this URL: http://industries.force.com/publicsector.

2. Make sure Experience Cloud is enabled. In Setup, search for **Settings** and select **Enable Digital Experiences**.

   See Enable Digital Experiences.

3. Install the unmanaged package for Emergency Program Management for Public Sector using this URL:
http://industries.force.com/publicsectorerm

4. Paste the URL for the package into your browser navigation bar and press **Enter**.

5. Enter your Salesforce password.

6. Select **Install**.

If it takes a while, you can select **Done** and move on to something else while installation finishes. Check your email for confirmation that installation was successful.

7. To verify that the package was installed, go to `Installed Packages` in Setup and look for the name of the package.

🛑 Important: Don't delete any part of the managed package after installing it. Doing so can block automatic upgrades to future releases.

✏️ Note: The custom objects, components, classes, and triggers delivered in the Emergency Program Management for Public Sector package are one API version behind the core Salesforce API. Standard objects have the same API version as core Salesforce. So, if your org's API version is 43, the Emergency Program Management custom objects are API version 42, and the standard Health Cloud objects are API version 43.

SEE ALSO:

Salesforce Help: Enable Communities

CONFIGURE GENERAL ORG SETTINGS

The configuration steps in this section apply to the majority of the features in Salesforce Emergency Program Management. If you've already completed these steps in your org, feel free to skip them.

Protect Your Sensitive Data with Salesforce Shield

Salesforce Shield is a set of security tools you can use to comply with regulations on storing sensitive protected health information. With Platform Encryption and Event Monitoring, you can monitor usage, prevent malicious activity, and protect data at rest while allowing full functionality.

Set Up an Organization-Wide Email Address

Define a list of organization-wide addresses for different user profiles. When they send email from Salesforce, these users can select their own email address or the organization-wide email address for the email's From field. Replies are delivered to the selected address.

Create User Profiles

Create user profiles to quickly add new users to the same permissions and field-level security settings.

Configure Field-Level Security for Users

Field-level security specifies the access level for each field in an object.

Configure and Assign Page Layouts for Emergency Program Management

Change the look and feel of page layouts for standard Salesforce objects and assign them to record types.

Create Emergency Program Management Users

You can add internal Salesforce users one at a time or in batches of up to 10 users.

Assign Emergency Program Management Permission Set Licenses

Permission set licenses enable users to access features beyond those that are included in their basic user licenses. To enable users to work in the Emergency Program Management app, assign them the necessary permission set licenses.

Emergency Program Management Permission Sets

Emergency Program Management provides special permission sets that give users access to features.

Create Sharing Settings

Set up sharing settings to control access to data at the record level.

Set Up Emergency Program Management Sites

Set up a Experience Builder Site to serve your constituents when they need it most. Provide healthcare to symptomatic patients, trace and monitor potentially exposed individuals, or quickly allocate emergency resources and services.

Use Flows to Automate Your Processes

To automate the processes and handoffs that manage patients and provide emergency services, we provided flows that you can customize in Flow Builder. Flows collect data and perform actions in your Salesforce org or an external system.

Protect Your Sensitive Data with Salesforce Shield

Salesforce Shield is a set of security tools you can use to comply with regulations on storing sensitive protected health information. With Platform Encryption and Event Monitoring, you can monitor usage, prevent malicious activity, and protect data at rest while allowing full functionality.

Shield Platform Encryption

Platform Encryption allows you to natively encrypt your most sensitive data at rest, allowing you to address HIPAA requirements for storing sensitive protected health information. Encryption helps you protect PII, PHI, sensitive, confidential, or proprietary data. It enables you to meet both external and internal data compliance policies while keeping critical app functionality—like search, workflow, and validation rules. You keep full control over encryption keys and can set encrypted data permissions to protect sensitive data from unauthorized users. To find more information about supported objects and fields, see Which Standard Fields Can I Encrypt?

The following objects don't support Platform Encryption.

Emergency Response Console Objects

- Business Regulatory Authorization Type
- Business Type
- Individual Application
- Inspection Type
- Regulatory Authorization Type
- Regulatory Authorization Type Product
- Regulatory Authority

Visit Objects

- Action Plan
- Action Plan Item
- Action Plan Template
- Action Plan Template Item Value
- Action Plan Template Item
- Action Plan Template Version
- Assessment Task
- Task
- Visit
- Visitor

Event Monitoring

Event Monitoring gives you access to detailed performance, security, and usage data on all your Salesforce apps. Every interaction is tracked and accessible via API, so you can view it in the data visualization app of your choice. See who is accessing critical business data when, and from where they're getting access. Understand user adoption across your apps. Troubleshoot and optimize performance to improve end-user experience. Event Monitoring data can be easily imported into any data visualization or application monitoring tool like Analytics, Splunk, or New Relic. To get started, check out our Event Monitoring Trailhead module.

Set Up an Organization-Wide Email Address

Define a list of organization-wide addresses for different user profiles. When they send email from Salesforce, these users can select their own email address or the organization-wide email address for the email's From field. Replies are delivered to the selected address.

1. From Setup, enter `Organization-Wide Addresses` in the Quick Find box, then select **Organization-Wide Addresses**.

2. To manage organization-wide addresses, use the available options.

To use an organization-wide address, send an email from Salesforce and choose your organization-wide address from the dropdown list.

Create User Profiles

Create user profiles to quickly add new users to the same permissions and field-level security settings.

Start by cloning the Standard User profile.

1. From Setup, enter `Profiles` in Quick Find, then select **Profiles**.

2. Clone the Standard User profile.

3. Give the profile a name to identify the type of user, such as `Reviewer` or `Service Dispatcher`.

4. Save your changes.

5. Click Edit and give permission to Emergency Program Management objects.

6. Save your changes.

You can now create users based on this profile.

Configure the Standard ERM User Profile
Create a profile and customize it with access to the tabs and page layouts that your users work with.

Configure the Standard ERM User Profile

Create a profile and customize it with access to the tabs and page layouts that your users work with.

📝 **Note:** Be sure to make these additions to the System Administrator profile.

1. In Setup, find **Profiles** and select the Standard User profile and clone it.

2. Assign the following record types.

Object	Record Type
Account	Business Account, Person Account
Business License Application	Reopening Permit
Individual Application	Emergency Request (Default), Location Access Permit Request, Training Certificate
Emergency Request	Emergency Assistance Request, Emergency Supplies Request, Emergency Supplies Donation

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions

3. In Custom App Settings, select **Visible** for the Emergency Response Console app.

4. In Custom Object Permissions, for Emergency Requests, select **Read**, **Create**, and **Edit** for the Standard ERM User and select **View All** and **Modify All** for the admin user.

5. In Custom Field-Level Security, select Emergency Request. Enable both Read Access and Edit Access for all fields for both the Standard ERM User and for the admin user.

6. Click **Save**.

Configure Field-Level Security for Users

Field-level security specifies the access level for each field in an object.

Sometimes, you want users to have access to an object, but limit their access to individual fields in that object. Field-level security—or field permissions—control whether a user can see, edit, and delete the value for a particular field on an object. They let you protect sensitive fields without having to hide the whole object from users. Field permissions are also controlled in permission sets and profiles. Set access on fields based on what type of access your users require.

1. From Setup, enter `Profiles` in the Quick Find box, select **Profiles**, and click **Edit**.

2. Select a profile and configure the following objects and fields.

Object	Internal User	Experience Cloud User
Account	Account Number: Edit	Account Number: Edit
Authorization Location Access Schedule	All fields: Edit	All fields: Edit
Business License	All fields: Edit or Read Only depending on profile	All fields: Read Only
Business License Application	All fields: Edit	All fields: Edit
Business Profile	Account: Edit Business Operating Name: Edit Business Structure: Edit Business Tax Identifier: Edit	Account: Edit Business Operating Name: Edit Business Structure: Edit Business Type Identifier: Edit
Case	Account Name: Edit	Account Name: Edit
Course Offering	All fields: Read Only	All fields: Read Only
Emergency Request	All fields: Edit	All fields: Edit
Individual Application	All fields: Edit	All fields: Edit
Location	Visitor Address: Edit	Visitor Address: Edit
Public Complaint	All fields: Edit	All fields: Edit
Regulatory Authorization Type Product (when using Health Cloud)	All fields: Edit	All fields: Read Only
Training Course	All fields: Edit	All fields: Read Only
Training Course Participant	All fields: Edit	All fields: Edit

Configure and Assign Page Layouts for Emergency Program Management

Change the look and feel of page layouts for standard Salesforce objects and assign them to record types.

1. To edit page layouts or page layout assignments, search for the object in Object Manager and select an option to customize.

2. Assign the following record types to page layouts for each object.

    For Business License Application, assign the Reopening Permit Request page layout to profiles.

    For Authorization Location Access Schedule, assign the Authorization Location Access Schedule Layout to profiles.

    For Emergency Request Page, assign the following page layouts to profiles.

    - Master: Emergency Request Layout

    - Emergency Assistance Request: Emergency Assistance Request Layout

    - Emergency Supplies Donation: Emergency Supplies Donation Layout

    - Emergency Supplies Request: Emergency Supplies Request Layout

    -

    For Individual Application, assign the following page layouts to profiles.

    - Master: Emergency Request Layout

    - Emergency Request: Emergency Request Layout

    - Location Access Permit Record Type: Location Access Permit

    - Training Certificate: Training Certificate

Create Emergency Program Management Users

You can add internal Salesforce users one at a time or in batches of up to 10 users.

> 📝 Note: To enable your company's employees to request location access permits or training certificates, add them as internal users with Platform Starter or greater licenses.

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

2. Click **New User** to add a single user or click **Multiple Users** to add up to 10 users at a time.

3. If multiple user license types are available in your organization, select the user license to associate with the users you plan to create.

    The user license determines the available profiles.

4. Specify the information for each user, including `Role` and `Profile`.

    If you use Salesforce Knowledge articles to manage protocols, enable `Knowledge User` for every user needing access to articles.

5. To email a login name and temporary password to each new user, select **Generate new password and notify user immediately**.

6. To specify more details for the users that you create, edit individual users as needed.

Assign Emergency Program Management Permission Set Licenses

Permission set licenses enable users to access features beyond those that are included in their basic user licenses. To enable users to work in the Emergency Program Management app, assign them the necessary permission set licenses.

1. In Setup, use the Quick Find box to find *Users* and select the users who are getting permission set licenses.

    💡 **Tip:** If you have more than a few users, consider creating a Permission Set Group.

2. In the **Permission Set License Assignments** section of the User record, click **Edit Assignments** and review the available permission set licenses.

3. Select one or more permission set licenses to assign.

Permission Set License	Description
Public Sector Community	Provides access to Public Sector data for site users.
Analytics for Emergency Program Management	Provides access to the CRM Analytics template app built for Emergency Response for Public Sector and Emergency Response for Public Health.
Emergency Response for Public Sector	Enables the permission set license for Emergency Program Management.

4. Click **Save**.

    💡 **Tip:** To see what permission set licenses are available, go to **Company Settings** in Setup and click **Company Information**. The permission sets available to you depend in part on which features are included in your Salesforce contract.

Emergency Program Management Permission Sets

Emergency Program Management provides special permission sets that give users access to features.

Use the following permission sets to give your users access to the features they use.

ActionPlans
Provides users with access to Action Plans so that they can create action plan templates and assign tasks related to service requests.

EmergencyResponseMgmt
Provides internal users with access to Emergency Program Management features such as approval of emergency requests and scheduling emergency service execution tasks.

IndustriesVisit
Provides access to objects and features of Industries Visit.

Create Sharing Settings

Set up sharing settings to control access to data at the record level.

1. From Setup, enter `Sharing` in the Quick Find box, select **Sharing Settings**, and click **Edit**.

2. Set up org-wide sharing for the following entities to be Private, Public Read Only, or Public Read/Write, as necessary.

   The following example shows criteria for sharing rules for internal and site users. Create sharing rules based on the needs of your organization.

   For internal users, grant the following access. Share these objects with the person who's scheduling the inspection or visit and the person who's performing the inspection or visit.

Object	Access Level
Assessment Indicator Definition	Read/Write
Assessment Task	Read/Write
Business License Application	Read Only
Individual Application	Read Only
Public Complaint	Read Only
Regulatory Authorization Type	Read Only
Regulatory Code Violation	Read/Write
Visit	Read/Write

For external users, grant the following access.

Object	Access Level
Business Type	Read Only
Course Offering	Read Only
Location	Read Only
Regulatory Authority	Read Only
Location	Read Only
Regulatory Authorization Type	Read Only
Training Course	Read Only

Note: The Activity object doesn't support sharing rules, so set its org-wide defaults to `Controlled by Parent` for default internal access, and `Controlled by Parent` for default external access.

Set Up Emergency Program Management Sites

Set up a Experience Builder Site to serve your constituents when they need it most. Provide healthcare to symptomatic patients, trace and monitor potentially exposed individuals, or quickly allocate emergency resources and services.

📝 **Note:** ERM Sites templates are currently only available in English. For Sites language support, see Multilingual Sites.

Create a Experience Cloud Site
Create your site using a wizard that helps you choose a template that's right for you.

Create Site User Profiles
Depending on which template you're using, you configure the Customer Site Plus user profile a little differently.

Customize the Pages of Your Site
Update the pages of your site to provide the critical information that citizens and volunteers need.

Make Business License Application Requests Visible to Site Users
Add the Record List component to the My Requests page so that businesses can check the status of their requests such as reopening permits.

Style Your Emergency Program Management Site with Custom CSS
Apply CSS to your site to get the right look and feel. We provide a CSS file as a static resource, so you simply copy the CSS and then paste the code into the CSS editor in Experience Builder.

Make Pages Publicly Available
When you create an Emergency Response site or an Emergency Public Health portal, configure the pages of your site to allow public access. When you allow public access, your site pages are available to the public, including unlicensed users. If you don't allow public access, members must log in to access the site.

Add Members to Your Site
When you add a profile to an Emergency Program Management site, all users assigned to that profile become members of the site.

Preview Your Site
Before going live, you can preview your Emergency Program Management site to see how it looks in a desktop browser window or on a mobile device.

Publish the Changes to Your Site
After you make the changes you want to your Emergency Program Management site and add members, you're ready to publish it.

Create a Experience Cloud Site

Create your site using a wizard that helps you choose a template that's right for you.

1. From Setup, enter `All` in the Quick Find box, select **All Sites**, and then click **New Site**.
   The Site Creation wizard opens with several Emergency Program Management Site templates
   for you to choose from.

2. Select the Emergency Response Site template.

   The Emergency Response Site makes it easy for citizens to request emergency assistance and
   get information when they need it most. Businesses also can request critical supplies that enable
   them to keep their employees and customers safe and healthy.

3. Click **Get Started**.

4. Enter a site name.

5. For URL, enter the name of your site.

   This name is appended to the domain that you created when you enabled Digital Experiences
   for this org. For example, if your site's domain name is
   `CountyPublicHealthDept.my.site.com` and you're creating an Emergency
   Response site, you can enter `EmergencyResponseSite` to create the unique URL
   `CountyPublicHealthDept.my.site.com/EmergencyResponseSite`.

   📝 Note: You can create one site that doesn't have a custom URL.

6. Click **Create**.
   Experience Workspaces opens, where you can build and administer your site. Your new site is in Preview status, meaning it's not
   available to your users yet.
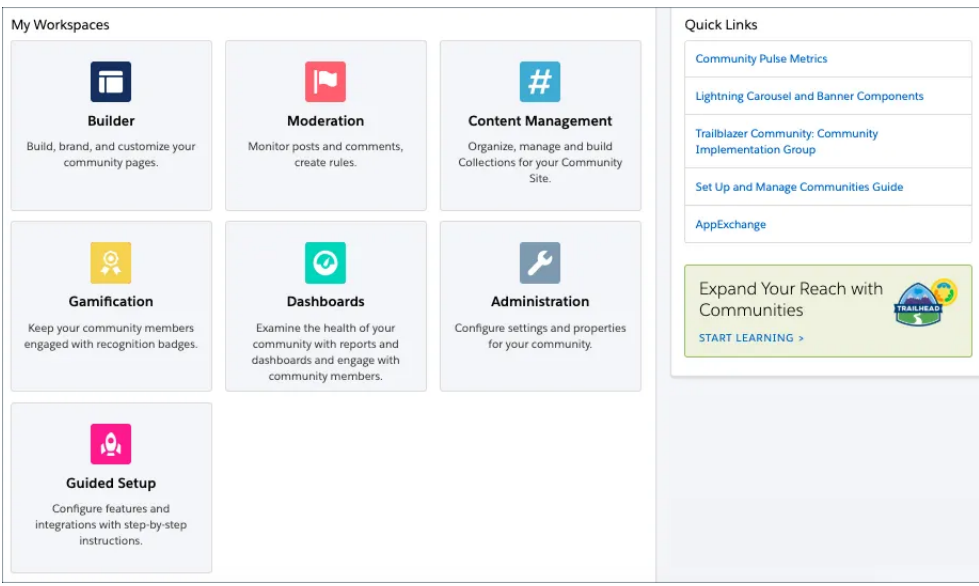
Create Site User Profiles

Depending on which template you're using, you configure the Customer Site Plus user profile a little differently.

Create an Emergency Response Community User Profile

Set up a profile for your Emergency Response portal by cloning the Customer Community Plus user profile.

1. Set up organization-wide sharing for the Regulatory Authorization Type.

    a. From Setup, enter `Sharing` in the Quick Find box, select **Sharing Settings**, and click **Edit**.

    b. For the Regulatory Authorization Type object, select **Public Read Only** for both internal and external access.

    c. Save your changes.

2. To clone the Customer Community Plus User profile, enter `Profile` in the Quick Find box, and then select **Profiles**.

3. Click **Clone** next to the Customer Community Plus User profile.

4. Enter a name for the profile, such as `ER Community Plus User`, and click **Save**.

5. In the Find Settings box, enter `Emergency Requests`, and click **Edit**.

    a. Enable **Assigned Record Types** for the following record types:

Object	Record Type
Business License Application	Reopening Permit
Individual Application	Emergency Request (Default), Location Access Permit Request, Training Certificate
Emergency Request	Emergency Assistance Request, Emergency Supplies Request, Emergency Supplies Donation

    b. Enable the **Read** and **Create** object permissions.

    c. Enable **Read Access** and **Write Access** permissions on every field.

6. Also configure the following object permissions:

Object	Access Level
Account	Read, Edit
Addresses	Read, Create
Authorization Application Place	Read, Create
Authorization Location Access Schedule	Read, Create

Object	Access Level
Business License	Read
Business License Application	Read, Create
Business Profile	Read, Create, Edit
Business Type	Read
Contact	Read, Edit
Course Offering	Read
Individual Application	Read, Create (disable Edit and Delete)
Location	Read, Create, Edit
Public Complaint	Read, Create
Regulatory Authorization Type	Read
Training Course	Read
Training Course Participant	Read, Create

7. In the Find Settings box, enter `Flows`, click **Edit**, and enable **Run Flows**. Save your changes.

8. In the Find Settings box, enter `Public Sector`, click **Edit**, and enable **Public Sector data for Community users**. Save your changes.

9. Add this profile to the site members.

10. Assign the cloned profile to your site users.

Set Up Sharing Sets

Grant site users access to their accounts.

A sharing set grants site or portal users access to any record associated with an account or contact that matches the user's account or contact.

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

2. In the Sharing Sets related list, click **New** to create a sharing set.

3. In the Sharing Set Edit page, fill in the **Label** and **Sharing Set Name** fields. **Label** is the sharing set label as it appears on the user interface. **Sharing Set Name** is the unique name used by the API.

4. Enter a description.

5. Select the profiles of the users to whom you want to provide access, for example, **ERM Customer Community Plus User**.

6. Select the Account object.

7. In the Configure Access section, click **Set Up** next to the object name.

8. Grant access based on an account or contact lookup:

- Select **Contact.Account** in the User dropdown.
- Select **Id** in the Target Object field.

9. Choose the access level of Read/Write.

10. Click **Update**, then click **Save**.

Customize the Pages of Your Site

Update the pages of your site to provide the critical information that citizens and volunteers need.

You edit the pages of your site in Experience Builder, where you can add content, create custom pages, and update theme properties such as colors and fonts.

To get to Experience Builder from Setup, enter `All` in the Quick Find box, select **All Sites**, and then click **Builder** beside the site that you want to customize. Or if you're in Experience Workspaces, click the **Builder** tile.
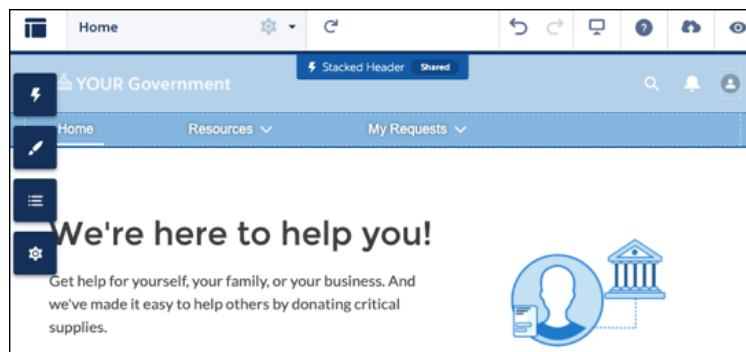
- Look around the Home page and click through the page sections and components.
- When you click an item on the page, its properties panel opens. Update the component's contents or properties as needed.

- Open the Pages menu on the top toolbar and scroll through the pages. To open a page for editing, click the page. To access the properties of a page, click ⚙ ▾ on the top toolbar.

- Click ⚡ to open the Components panel and drag components onto the page.
- To add content to your pages, you can use the Rich Content Editor and the HTML Editor components. Alternatively, you can create content in Salesforce CMS and Salesforce Knowledge and add it to your pages. As a general rule, create content such as blogs, announcements, and news articles in Salesforce CMS. Create help articles such as FAQs and how-tos in Salesforce Knowledge.

💡 Tip: Experience Builder takes you on a mini-tour of how to create a site. Step through to get the feel for building a site. If you want to take the tour again later, from the Information menu, click ❓ > **Take a Tour**.

Make Business License Application Requests Visible to Site Users

Add the Record List component to the My Requests page so that businesses can check the status of their requests such as reopening permits.

1. From Setup, enter `All` in the Quick Find box, select **All Sites**, and then click **Builder** beside the site you're configuring.

2. In Experience Builder, open the Pages menu on the top toolbar.

3. Select the My Submitted Requests page to open it.

4. Select the Record List component on the page to open its properties

5. In the property editor, configure the properties.

Property	Details
Number of Records	The number of entries retrieved to show in the list view. The default is 25.
Layout	Choose from full, standard, or compact layout.
Object Name	The Salesforce object whose records you want to show. To show the requests submitted by a business, select **Business License Application**. To show requests submitted by an individual, select **Individual Application**.
Filter Name	The list view to show for the selected object. The dropdown shows only list views that are valid for the object you select.
Allow list pinning	Lets users select their preferred default view for a record list. Enabled by default.
Allow inline edit	Lets users edit individual fields in a list. Enabled by default.

Style Your Emergency Program Management Site with Custom CSS

Apply CSS to your site to get the right look and feel. We provide a CSS file as a static resource, so you simply copy the CSS and then paste the code into the CSS editor in Experience Builder.

1. To locate the CSS file, from Setup, enter `Static` in the Quick Find box, and then select **Static Resources**.

2. To configure the Emergency Response Site template, click the EmergencyResponseCommunity CSS file.

3. Click **View File** and then copy the contents of the file.
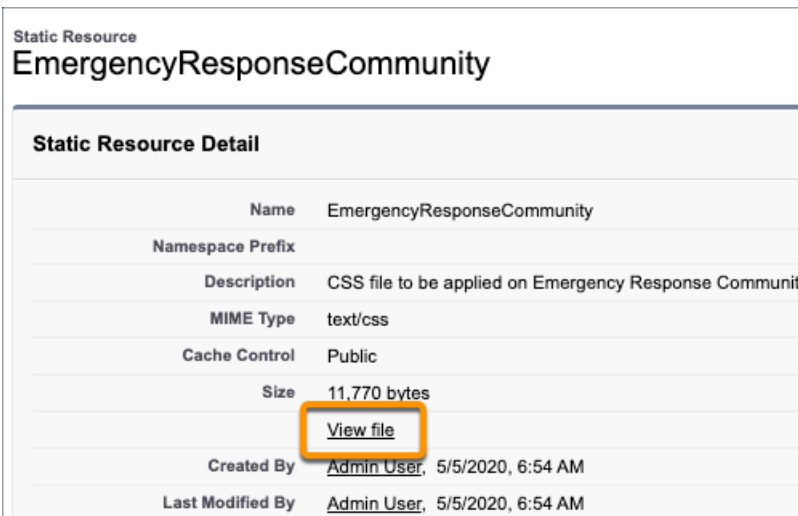
4. Return to Experience Builder. From Setup, enter `All` in the Quick Find box, select **All Sites**, and then click **Builder** beside the site that you're configuring.

5. Open the Theme panel and click ▼ > **Edit CSS**.
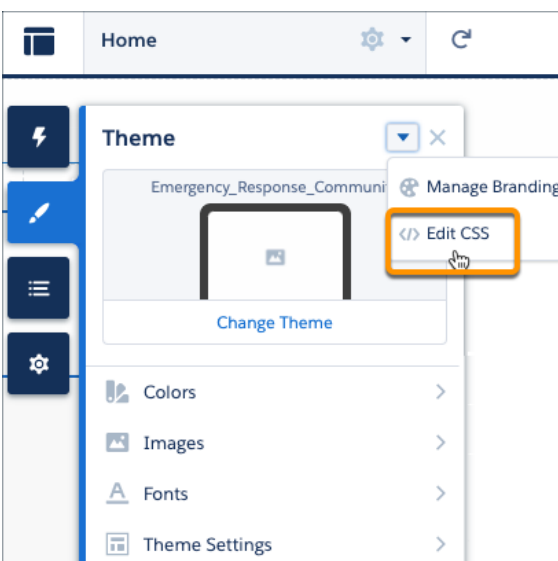
6. Paste the copied CSS into the Edit CSS window and click **Save**.

    Your page refreshes with the newly applied CSS.

    💡 Tip: You can also use Theme properties to update the color, images, and fonts used in your site.

Make Pages Publicly Available

When you create an Emergency Response site or an Emergency Public Health portal, configure the pages of your site to allow public access. When you allow public access, your site pages are available to the public, including unlicensed users. If you don't allow public access, members must log in to access the site.

For the Emergency Response Site, set page-level access for the My Submitted Requests and the Raise A Request pages.

1. Open the Pages menu (1) on the top toolbar and click ••• (2) beside the My Submitted Requests page.
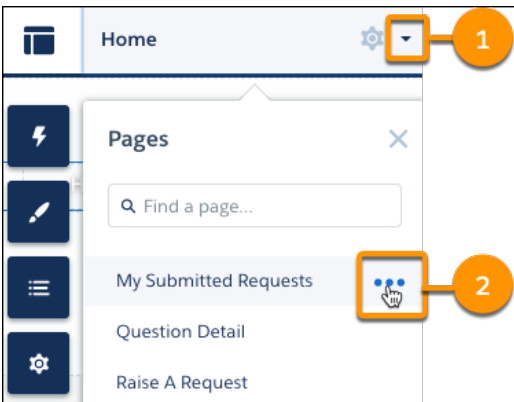
2. In the Page Access dropdown, select **Requires Login**.
    Requires Login makes the page private and requires members to log in, regardless of the site's default setting.

3. Repeat for the Raise A Request page.

Add Members to Your Site

When you add a profile to an Emergency Program Management site, all users assigned to that profile become members of the site.

1. From Setup, enter **Sites** in the Quick Find box, and then click **All Sites**.

2. Click **Experience Workspaces** beside your site.

3. Click **Administration** > **Members**.

4. Select the Customer Site Plus User profile that you cloned previously. If you don't see the profile, change the search to **All**.

5. Save your changes.

Preview Your Site

Before going live, you can preview your Emergency Program Management site to see how it looks in a desktop browser window or on a mobile device.

- To preview the site in a browser window, click **Preview** on the toolbar.

- In Preview mode, to see the site in its own browser tab as:

  - A logged-in user would see it, click 👁 > **Authenticated User**.

  - An unauthenticated visitor would see it, click 👁 > **Guest User**. As long as your site includes one public page, such as the Home page, you can use the **Guest User** option.
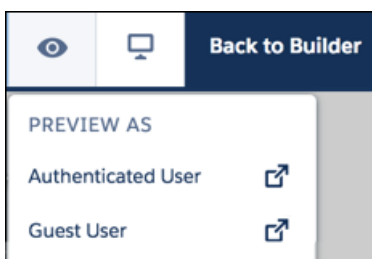
- To preview the site on different devices, use the options in the 🖵 menu.
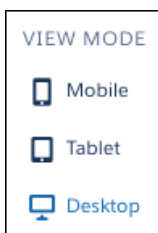
Publish the Changes to Your Site

After you make the changes you want to your Emergency Program Management site and add members, you're ready to publish it.

Publishing a Experience Builder Site for the first time makes the site URL live and enables login access for site members. After that, each time you publish the site you update the live site with your most recent updates.

1. In Experience Builder, preview your site to make sure that your site appears as expected.

2. When you're happy with your changes, click **Publish** on the toolbar.

   ⊘ **Important:** *All* changes made to a site since the last time it was published are included.

3. Click **Publish** again.
   Your site is now live with all the latest changes.

   💡 **Tip:** If you want to send out a welcome email to all site members or set up SEO, you must also activate your site.

Use Flows to Automate Your Processes

To automate the processes and handoffs that manage patients and provide emergency services, we provided flows that you can customize in Flow Builder. Flows collect data and perform actions in your Salesforce org or an external system.

Pre-Configured Flows Included in Emergency Program Management
We provide some of the basic flows you need to get up and running. You can customize them as you like to suit your needs.

Customize Standard Flow Templates
The flows in Emergency Program Management are installed as standard flow templates. You can customize any of the flows to suit your business needs.

Pre-Configured Flows Included in Emergency Program Management

We provide some of the basic flows you need to get up and running. You can customize them as you like to suit your needs.

Feature Set	Flow Name	Description
Emergency Service Request	Create a Visit for Emergency Request Event	Creates a visit and its related tasks whenever an Emergency Service Visit event type is created. This flow runs in the background when the dispatcher selects multiple emergency requests on the SFMaps and adds them to the calendar.
Emergency Service Request	Emergency Assistance Request	Creates an application and related records for an emergency assistance request.
Emergency Service Request	Emergency Supplies Donation	Creates an application and related records for donation request.

Feature Set	Flow Name	Description
Emergency Service Request	Emergency Supplies Request	Creates an application and related records for an emergency supplies request.
Emergency Service Request	Request a Location Access Permit	Creates an application and related records for a request to receive access to a location.
Emergency Service Request	Request a Training Certificate	Creates an application and related records for a request to receive certification for attending a training class.
Emergency Service Request	Request a Reopening Permit	Creates an application and related records for a request to the reopening of a business or organization.

Customize Standard Flow Templates

The flows in Emergency Program Management are installed as standard flow templates. You can customize any of the flows to suit your business needs.

To customize a flow, create a flow based on a standard flow template. Make sure to add the following default variables in each of the flows you use in your org.

Flow Name	Variable	Description
Request a Location Access Permit	Address Type	Add the type of address you use to filter address records for location access requests.
Request a Location Access Permit	Regulatory Authorization Type	Add the name of the regulatory authorization type used for location access requests. The variable associates the individual application with the regulatory authorization type.
Request a Reopening Permit	Regulatory Authorization Type	Add the name of the regulatory authorization type used for reopening permit requests. The variable associates the business license application with the regulatory authorization type.
Request a Training Certificate	Regulatory Authorization Type	Add the name of the regulatory authorization type used for training certificate requests. The variable associates the individual application with the regulatory authorization type.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.
2. Click **New Flow**.

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3. In the list of templates, select the template that you want to customize, and click **Create**.

4. Customize the flow according to your business requirements, and then click **Save As** to create a different version of the flow.

5. Activate the flow.

   a. In the list of flows, click the name of the new flow.

   b. Under Flow Versions, next to the latest version of the flow, click **Activate**.

CONFIGURE EMERGENCY SERVICES

Create emergency services for businesses and individuals. You can configure different services and programs that are available for public agencies and hospitals, such as emergency supply requests. For individuals, create programs such as food delivery services or short-term housing requests.

> **Note:** To test your implementation, make sure to log in as a user to create a service request. Requests are associated with person accounts, and the flow can't run correctly for someone logged in as an admin.

Create Person Accounts for Self-Registering Site Users

Make it easy for your users to self-register in your emergency services community. Instead of creating users as contacts under a single business account, you can assign each self-registering user to a person account.

Add Related Lists to Page Layouts

Add related lists to page layouts so your users have the information they need at their fingertips.

Add Custom Visit Priorities

Track the priority of your visits by creating custom priority picklist values.

Customize Picklist Values for Emergency Services

Add a custom picklist value and remove unnecessary picklist values for the Service Category field.

Create a Queue for Incoming Service Requests

Set up the queue for incoming emergency service requests so that they can be reviewed and assigned to be fulfilled.

Configure Emergency Service Applications

Create service applications for businesses and individuals.

Set Up an Approval Process for Service Request Applications

Configure an automated process to track and approve service request applications.

Set Up Inspections

When you set up inspections, your agency can create inspections for businesses and organizations, manage violations, and implement enforcement actions. Use assessment indicators that the inspector using the inspection app can access.

Set Up Service Execution for Field Responders

After setting up emergency response applications, configure action plans and Visits so your field responders can complete service requests.

Deliver Emergency Supplies

When someone requests a delivery of food or medicine, make sure that you can deliver it quickly and efficiently.

Create Training Courses

Create records for classes authorized by a government authority that qualify a license or permit.

Use Salesforce Maps for Efficient Emergency Service Delivery

Give emergency supplies delivery personnel precise location information so that they can get important emergency supplies to the people who request it. Salesforce Maps injects location intelligence into field operations to make emergency supply delivery services more efficient. The Create a Visit for Emergency Request Event flow ties the emergency request record to the event. When an emergency event is created, the Schedule an Emergency Visit process starts the flow. The flow creates the visit record, applies the action plan template, and creates the tasks.

Create Person Accounts for Self-Registering Site Users

Make it easy for your users to self-register in your emergency services community. Instead of creating users as contacts under a single business account, you can assign each self-registering user to a person account.

📝 **Note:** Before you follow these steps, enable Person Accounts.

You set up self-registration for person accounts from your site's Login & Registration page. Under Registration, select **Allow external users to self-register**. Make sure that the **Account** field is empty. When you remove the Account information, new users are created as person accounts.

Salesforce creates a separate person account for each self-registering user. You can specify a default profile while setting up the self-registration. You can also customize the self-registration functionality with the self-registration Apex controller (`CommunitiesSelfRegController`), but it's not required.

Add Related Lists to Page Layouts

Add related lists to page layouts so your users have the information they need at their fingertips.

1. From Setup, open **Object Manager**, and use Quick Find to select the object to change.

2. Click **Page Layouts** and **Related Lists**.

   Add these related lists to the page layouts.

Object	Related List
Account	Business License, Business License Application, Individual Application, Emergency Request, Public Complaint
Assessment Task	Notes, Files
Authorization Application Place	Authorization Location Access Schedule
Business License Application	Approval History, Attachments, Files, Visits
Case	Individual Application, Visits
Individual Application	Emergency Request Layout: Approval History, Emergency Request, Visits Location Access Permit Layout: Approval History, Attachments, Authorization Application Place, Files Training Certificate Layout: Approval History, Attachments, Files
Inspection Assessment Indicator	Files, Regulatory Code Violation
Person Account	Business License, Emergency Request, Individual Application, Training Course Participants
Public Complaint	Visits
Regulatory Code Violation	Files, Violation Enforcement Action

Object	Related List
Visit	Action Plan, Assessment Tasks, Notes, Regulatory Code Violation, Visitors, Visited Parties

3. Click **Save**.

Add Custom Visit Priorities

Track the priority of your visits by creating custom priority picklist values.

Plan carefully when you create task types so that there aren't too many choices in the picklist.

1. From Setup, enter `Visit` in the `Quick Find` box.

2. Click **Fields & Relationships** and select **Visit Priority**.

3. In the Picklist Values section, click **New**.

4. Add one or more picklist values in the text box, such as `High`, `Medium`, or `Low`. Put each value on its own line.

5. Click **Save**.

6. To change the order in which the values display in the picklist, click **Reorder**.

7. To specify a default value for the picklist, select the `Default` checkbox for that task type.

Customize Picklist Values for Emergency Services

Add a custom picklist value and remove unnecessary picklist values for the Service Category field.

1. In Setup, go to the Object Manager and select **Regulatory Authorization Type** .

2. Click **Fields & Relationships** and select **Category**.

3. In the Service Categories Picklist Values section, deactivate the License and Permit picklist values.

4. Click **New** and add the picklist value `Emergency Service` as the default value.

Create a Queue for Incoming Service Requests

Set up the queue for incoming emergency service requests so that they can be reviewed and assigned to be fulfilled.

1. From Setup, enter `Queues` in the `Quick Find` box, then select **Queues**.

2. Click **New**.

3. Enter Incoming Case Default Queue the queue label and Incoming_Case_Default_Queue as the queue name. The label is the name of the list view that users work from.

4. Choose whom to notify when new records are added to the queue.

5. If your org uses divisions, select the queue's default division.

6. Select **Case** as the object to include in the queue.

7. Add queue members. Members can be individuals, roles, public groups, territories, connections, or partner users.

8. Save the queue.

Configure Emergency Service Applications

Create service applications for businesses and individuals.

Create Records for Emergency Service Organizations

Regulatory authorities are the government agencies that provide emergency services.

Create an Emergency Request

Citizens or businesses submit requests for emergency assistance using the Emergency Response site.

Create Records for Different Types of Emergency Services

Create records for the type of emergency services your agency or other agencies offer. For example, create a service type for temporary housing requests or medicine or food delivery.

Create a Business Type

Create a business type to capture the activities of a business or an individual applying for a license or a permit.

Create Records for Different Types of Emergency Services

Create records for the type of emergency services your agency or other agencies offer. For example, create a service type for temporary housing requests or medicine or food delivery.

Create an Inspection Type for Emergency Services

Inspection types define the scope of how you deliver the services that your agency offers. For example, `Prescription Drug Delivery` defines the kind of visit that your dispatcher can to a delivery person.

Create Emergency Service Authorizations

Use authorizations to approve specific types of applications such as for recurring financial assistance payments or allocation of equipment and supplies.

Create Records for Emergency Service Products

Create a catalog of products that are associated with the types of emergency services you provide. You can include products from Health Cloud care programs in the products you provide as part of a service request.

Create record types for business and individual applications so that you can have different application statuses, categories, and information for each application type. It's a best practice to use the same name for record types as the application types.

Add custom picklist values that appear in the Application Status field for individual and business license applications.

Create Records for Emergency Service Organizations

Regulatory authorities are the government agencies that provide emergency services.

1. From the App Launcher, find and open **Regulatory Authority**, and then click **New**.

2. Enter the name and description of the government agency.

3. Click **Save**.

SEE ALSO:

RegulatoryAuthority

Create an Emergency Request

Citizens or businesses submit requests for emergency assistance using the Emergency Response site.

1. From the App Launcher, find and open **Emergency Requests**, and then click **New**.

2. Complete the following fields, as necessary.

Field	Description
Account	Account name for the applicant.
Business License Application	Identifier of the business application.
Date Required	Date that the service is required.
Delivery Address	Address to which the service must be delivered.
Delivery Health or Safety Concerns	Health and safety instructions for the delivery person.
Delivery Instructions	Instructions for the delivery person.
Disinfectant Quantity	Amount of disinfectant requested.
Drop-Off Donation	Indicates whether the donation can be dropped off.
Email	Applicant's email address.
Face Shield Quantity	Number of face shields requested.
Gloves Quantity	Number of gloves requested.
Gowns Quantity	Number of gowns requested.
Hand Sanitizer Quantity	Number of bottles of hand sanitizer requested.
Individual Application	Identifier for the application.

Field	Description
Individual Application	Identifier of the individual application.
Masks Quantity	Number of masks requested.
Organization Address	Address of the requesting organization.
Organization Name	Name of the requesting organization.
Organization Type	Type of business or organization, such as Adult Day Health Care or Surgical Clinic.
Owner	Name of the person who submitted the request.
Phone	Applicant's phone number.
Primary Contact Name	Name of the primary contact associated with the request.
Primary Contact Phone	Phone number for the primary contact.
Request Details	Details regarding the request.
Requested Length of Stay	For temporary housing requests, the number of days requested for housing.
Requested Service	Type of service requested in the application.
Requested Start Date of Stay	For temporary housing requests, the first day temporary housing is requested.
Requestor Name	Name of the person requesting the service.
Requestor Name	Name of the person requesting an emergency service.
Request Reason	Reason that the applicant is requesting assistance.
Respirator Quantity	Number of respirators requested.
Safety or Protective Goggles Quantity	Number of protective goggles requested.
Secondary Contact Name	Name of a second person to contact.
Secondary Contact Phone	Phone number of the second person to contact.
Status	Application's status in the system, such as Ready for Distribution.
Ventilator Quantity	Number of ventilators requested.

3. Click **Save**.

Create Records for Different Types of Emergency Services

Create records for the type of emergency services your agency or other agencies offer. For example, create a service type for temporary housing requests or medicine or food delivery.

Create the following records, as necessary, for the way your org is set up.

- Emergency PPE Donation

- Emergency PPE Supply
- Food Delivery
- Medicine or Medical Supply Delivery
- Temporary Housing
- Well-Being Check

1. From the App Launcher, find and open **Regulatory Authorization Type**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	Name of the type of service your agency offers.
Description	Description of the emergency service.
Regulatory Authorization Code	Identifier for the service.
Jurisdiction	Name of the area served by your agency.
Issuing Department	Name of the department that manages the service.
Processing Time	Average time it takes to process the service.
Measurement	Type of measurement used to account for processing time. For example, days or months.

3. Click **Save**.

After creating the service types, edit the Emergency Assistance Request, Emergency Supplies Donation, and Emergency Supplies Request flows per your requirement. For example, for the Emergency Assistance Request flow, edit the Type of Assistance Screen, and add your service types in the Requested Service field. Configure the flow path per your requirement.

Create a Business Type

Create a business type to capture the activities of a business or an individual applying for a license or a permit.

1. From the App Launcher, find and open **Business Types**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	Name of the business.
Description	Description of the business.
Industry	Business category in which the business operates.
Activity Code	Type of entity performing the activity.
Authorization Activity Type	Category under which the business is authorized to operate.

3. Click **Save**.

Create Records for Different Types of Emergency Services

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Create the following records, as necessary, for the way your org is set up.

- Emergency PPE Donation
- Emergency PPE Supply
- Food Delivery
- Medicine or Medical Supply Delivery
- Temporary Housing
- Well-Being Check

1. From the App Launcher, find and open **Regulatory Authorization Type**, and then click **New**.

2. Complete the following fields.

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Name	Name of the type of service your agency offers.
Description	Description of the emergency service.
Regulatory Authorization Code	Identifier for the service.
Jurisdiction	Name of the area served by your agency.
Issuing Department	Name of the department that manages the service.
Processing Time	Average time it takes to process the service.
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3. Click **Save**.

After creating the service types, edit the Emergency Assistance Request, Emergency Supplies Donation, and Emergency Supplies Request flows per your requirement. For example, for the Emergency Assistance Request flow, edit the Type of Assistance Screen, and add your service types in the Requested Service field. Configure the flow path per your requirement.

Create an Inspection Type for Emergency Services

Inspection types define the scope of how you deliver the services that your agency offers. For example, `Prescription Drug Delivery` defines the kind of visit that your dispatcher can to a delivery person.

1. From the App Launcher, find and open **Inspection Type**, and then click **New**.

2. Enter a name and a description for the inspection type.

3. Click **Save**.

Create Emergency Service Authorizations

Use authorizations to approve specific types of applications such as for recurring financial assistance payments or allocation of equipment and supplies.

1. From the App Launcher, find and open **Business License**, and then click **New**.

2. Complete the following fields.

Field	Description
Regulatory Authorization Type	Name of the type of emergency service.
Individual or Business Type	Indicates whether the application is from an individual or a business.
Country	Name of the county.
State	Name of the state.
Other	Other information.

3. Click **Save**.

Create Records for Emergency Service Products

Create a catalog of products that are associated with the types of emergency services you provide. You can include products from Health Cloud care programs in the products you provide as part of a service request.

1. From the App Launcher, find and open **Regulatory Authorization Type Product**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	Name of the product associated with the emergency service.
Product	Name of the product.
Regulatory Authorization Type	Name of the type of emergency service this product is associated with.

3. Click **Save**.

Create Record Types for Each Application Type

Create record types for business and individual applications so that you can have different application statuses, categories, and information for each application type. It's a best practice to use the same name for record types as the application types.

1. From the management settings for the appropriate application object, go to Record Types.

2. Click **New**.

3. Choose **Master** from the Existing Record Type dropdown list to copy all available picklist values, or choose an existing record type to clone its picklist values.

4. Enter a record type label that's unique within the object.

5. Enter a record type name.

6. Enter a description.

7. Select **Active** to activate the record type.

8. Select **Make Available** next to a profile to make the record type available to users with that profile. Select the checkbox in the header row to make it available for all profiles.

9. For enabled profiles, select **Make Default** to make it the default record type for users of that profile. Select the checkbox in the header row to make it the default for all profiles.

10. Click **Next**.

11. Choose a page layout option that determines which page layout displays for records with this record type:

    a. To apply a single page layout for all profiles, select **Apply one layout to all profiles** and choose the page layout from the dropdown list.

    b. To apply different page layouts based on user profiles, select **Apply a different layout for each profile** and choose a page layout for each profile.

12. Click **Save** to edit the values of items like application statuses and application type picklists available for the record type.

Customize Application Status Picklist Values

Add custom picklist values that appear in the Application Status field for individual and business license applications.

1. In Setup, go to the Object Manager, and select **Individual Application**.

2. Click **Fields & Relationships**, and select **Application Status**.

3. Click **New**, and add picklist values for applications such as *Submitted*, *In Review*, or *Approved*.

4. Repeat these steps for the Business License Application object.

Set Up an Approval Process for Service Request Applications

Configure an automated process to track and approve service request applications.

Create Locations for Location Access Permits
When site users request a permit to access a building or a place, you can provide them with a set of locations and addresses from which to choose.

Customize Emergency Service Application Status Values
Add custom picklist values that appear in the application status path.

Enable Paths
Create Paths to guide users and reviewers along the application statuses in a review process.

Create Paths to Track Application Statuses in the Review Process
Create a path for each record type so that your users can see the next step in the application lifecycle.

Add an approval path and the applications related list to the Individual Application and the Business License Application pages so that your approvers can process requests efficiently.

Use a queue for reviewers to manage their application review backlog.

Automate the emergency service application review and approval processes by creating an approval process.

Use Process Builder to automate your processes like scheduling an emergency visit or approving applications.

Use email templates to save time and standardize email sent by you or others in your organization. Use merge fields or enhanced letterhead if you need them. Templates you create are automatically private, but you can make them available for use by others in your organization.

Create Locations for Location Access Permits

When site users request a permit to access a building or a place, you can provide them with a set of locations and addresses from which to choose.

<div style="float:right; border:1px solid #ccc; padding:4px;">

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions

</div>

1. From the App Launcher, find and open **Location**, and then click **New**.

2. Enter the name of the location, such as `City Hall` and select a location type such as Municipal Building.

3. Save your work.

4. In the New Visitor Address field on the Details tab, select an address or click **New Address** and in the Parent field, select a location such as **City Hall**.

5. Select the location type and the address type for the address. (In our example, select **Municipal Building** for Location Type and **Secured Location** for Address Type.

6. Search for the address and enter any other optional information.

7. Save your work.

Customize Emergency Service Application Status Values

Add custom picklist values that appear in the application status path.

1. In Setup, go to the Object Manager and select **Individual Application**.

2. Click **Fields & Relationships** and select **Application Status**.

3. Click **New** and add picklist values for Distribution and Closed. The Submitted and the In Review status are available by default.

Enable Paths

Create Paths to guide users and reviewers along the application statuses in a review process.

To create a path, you must enable Paths.

1. From Setup, enter `Path Settings` in the Quick Find box.

2. Click **Enable**.

Create Paths to Track Application Statuses in the Review Process

Create a path for each record type so that your users can see the next step in the application lifecycle.

1. From Setup, use the Quick Find box to find **Path Settings**.

2. In Step 1 of path setup, enter basic information about the path, and click **Next**.

   a. Enter a unique name for the path.

   b. Optionally, change the API reference name.

   c. Select the Individual Application object for the path.

   d. Select **Master** as the record type.

   e. Select the **Application Status** picklist so that you can use its values in the path.

   f. Click **Next**.

3. In Step 2 of path setup, select key fields, enter guidance, and then click **Next**.

   a. For each step on the path, select up to five key fields.

   b. For each step on the path, enter up to 1,000 characters of guidance.

4. In Step 3 of path setup, to display an animation when the application reaches designated statuses, enable on-screen confetti. Decide whether to activate the path immediately, and click **Finish**. To activate the path later, return to Path Settings.

Add an Approval Path to an Application Page

Add an approval path and the applications related list to the Individual Application and the Business License Application pages so that your approvers can process requests efficiently.

1. On the Individual Application page, click the gear ⚙ icon, and select **Edit Page**.

2. In App Builder, add the Path and the Related List components to the Individual Application page.

3. Save and activate the page.

4. Select the App, Record Type, and Profile tab. Then select **Assign to Apps, Record Types, and Profiles** and **Emergency Response Console**.

5. Click **Save**.

6. Repeat these steps for the Business License Application page.

Create an Application Queue for Reviewers

Use a queue for reviewers to manage their application review backlog.

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

2. Click **New**.

3. Enter a label and queue name. The label is the name of the list view that users work from.

4. Choose whom to notify when new records are added to the queue.

5. Add the Business Application object to Selected Objects field for business applications and Individual Application object to Selected Objects field for individual service requests.

6. Add queue members.

7. Save your changes.

8. If you need additional queues, repeat steps 2 to 7.

Create an Approval Process for Applications

Automate the emergency service application review and approval processes by creating an approval process.

There are several types of approval processes associated with Emergency Program Management for Public Sector. Depending on your needs, you can set up approval processes for each application type.

Object	Approval Process	Value for Specify Entry Criteria
Business License Application	Business Reopen Permit	Business License Application: Record Type equals Reopening Permit Request
Individual Application	Location Access Permit	Individual Application: Record Type equals Permit Request
Individual Application	Training Certificate	Individual Application: Record Type equals Training Certificate
Individual Application	Emergency Request	
Business License Application	Business Reopening Permit	

1. From Setup, enter `Approval Processes` in the Quick Find box, and then select **Approval Processes**.

2. For Manage Approval Processes For, select **Individual Application** or **Business License Application**.

3. Select **Create New Approval Process | Use Jump Start Wizard**.

4. For Name, enter the name of the approval process.

5. Accept the unique name.

6. For Specify Entry Criteria, select the field, operator, and value listed in the table and click **Next**.

7. For Select Approver, select **Automatically assign to queue** and select the name of the reviewer queue.

8. Save your changes.

9. Click **View Approval Process Detail Page**.

10. Complete the following steps to add an inspection as an approval step to each application.

    a. Click **New Approval Step**.

    b. Enter a name for the inspection step.

    c. Accept the unique name.

    d. Enter the step number.

    e. Select **All records should enter this step**.

    f. For Select Approver, select **Automatically assign to queue** and select the queue name.

    g. Select **Perform all rejection actions for this step AND all final rejection actions. (Final Rejection)**.

    h. Save your changes.

11. On the Approval Process page, click **Activate**.

Use Process Builder to Submit Requests or Applications

Use Process Builder to automate your processes like scheduling an emergency visit or approving applications.

1. From Setup, enter `Process Builder` in the Quick Find box, select **Process Builder**, and then click **New**.

2. Enter a name for the process. Accept the API name.

3. For `The process starts when`, select **A record changes**.

4. Click **Add Object**.

5. In Object, enter the name of the object the process is based on.

6. Select **when a record is created or edited**.

7. Click **Save**.

8. Next, configure the process to submit each Emergency Service Type to its corresponding Approval Process.

   a. Click **Add Criteria**.

   b. Enter a name for the criteria. Select **Conditions are met**.

   c. Set the conditions.

Process	Object	Field	Operator	Type	Value
Reopening Permit	BusinessLicenseApplication	BusinessLicense	Equals	String	Reopening_Permit_Request
Emergency Visit	IndividualApplication	IndividualApplication	Equals	String	Emergency_Request
Training Certification	IndividualApplication	IndividualApplication	Equals	String	Training_Certificate
Location Access Permit	IndividualApplication	IndividualApplication	Equals	String	Location_Access_Permit

   d. Select the radio button specifying that all of the conditions are met.

   e. Click **Save**.

   f. Click **Add Action**.

   g. For Action Type, select **Submit for Approval**.

   h. Enter a name for the action.

   i. For Approval Process, choose **Specific approval process** and enter the name of an approval process for this Regulatory Authorization Type.

   j. Click **Save**.

9. Click **Activate**.

Create an Email Template with a QR Code

Use email templates to save time and standardize email sent by you or others in your organization. Use merge fields or enhanced letterhead if you need them. Templates you create are automatically private, but you can make them available for use by others in your organization.

1. From the App picker, navigate to Email Templates and click **New**.

2. Enter a name for the template and select the related entity type.

3. Select the folder in which to store the template.

4. Compose the subject and body of the email.

5. Click the **Merge** icon and use the merge picker to insert merge fields.

6. Click the **Source** icon to add HTML code.

   Include the QR code for the permit by adding the following URL to the HTML inside of an image tag. *(<img src= "https://<your domain>/qrcode/{{{BusinessLicense.Id}}}" alt="QRCode"/>)*

7. Save your work.

Sample email template.

Sample HTML code.

```html
<html style="overflow-y: hidden;">
<head>
<title></title>
</head>
<body style="height: auto; min-height: auto;"><br />
```

```
Hello, <br />
<br />
Your training certificate request is approved! Here are the details and your QR code:<br
/>
<br />
<table><tbody>
<tr><td><b>Name:</b></td><td> {!BusinessLicense.Name}</td>
<tr><td><b>Authorization Id:</b></td><td> {!BusinessLicense.Identifier}</td>
<tr><td><b>Issuer:</b></td><td> {!BusinessLicense.Issuer}</td>
<tr><td><b>Period Start:</b></td><td> {!BusinessLicense.PeriodStart}</td>
<tr><td><b>Period End:</b></td><td> {!BusinessLicense.PeriodEnd}</td>
<tbody></table>
<br />
Use the QR code to show the status of your permit.<br />
<br />
<img src="https://<your domain name>/qrcode/{{{BusinessLicense.Id}}}" alt="QR Code" />
<br />
Thanks,<br />
City & County of Hillwood</div>
</body>
</html>
```

SEE ALSO:

> *Salesforce Help*: Email Templates in Lightning Experience

Set Up Inspections

When you set up inspections, your agency can create inspections for businesses and organizations, manage violations, and implement enforcement actions. Use assessment indicators that the inspector using the inspection app can access.

Enable Notes
Enable Notes so that your users can add notes during inspections.

Add the Inspections App to the List of Navigation Items
Add the Inspection App to the items your users can access from the navigation bar.

Customize Inspection App Picklist Values
Add custom picklist values that appear in the Inspection App.

Create an Emergency Service Regulatory Code
Create regulatory code records for the different codes that pertain to reopening locations or permitting people to access locations.

Create an Emergency Service Assessment Indicator Definition
Each assessment indicator definition is a regulatory standard parameter that the inspector can check during an inspection.

Create an Emergency Service Regulatory Code Assessment Indicator
Assessment indicators are relevant regulatory standards that are applicable to businesses. Each assessment indicator definition is a regulatory standard parameter that the inspector can check during an inspection. For example, an assessment indicator for a reopening permit can include ensuring that tables in a restaurant are outside and more than 6 feet apart.

Create Assessment Tasks

Assessment tasks are the individual tasks that are performed during an inspection.

Create Assessment Task Definitions

An assessment task definition associates an assessment task with an assessment indicator definition.

Create an Emergency Service Violation Type

Create violation type records for different types of violations recorded during inspections.

Create a Violation Enforcement Action

Create violation enforcement action records to track enforcement actions related to a violation. For example, if a restaurant doesn't have proper social distancing measures, they can be fined or asked to close.

Create an Inspection Type

Create inspection type records for the different types of inspections required to issue license and permits.

Create an Inspection Action Plan Template

Create action plan templates with different sets of tasks. You can then use the action plan template to create multiple inspections. For example, you create an action plan template for different license types such as restaurants, hair salons, or retail stores.

Associate Tasks with an Action Plan Template

Add the tasks tot be performed for similar inspections to an action plan template. You can then use the template to create multiple inspections. For example, for a restaurant license action plan, include fire safety check tasks and hygiene safety check tasks.

Associate Tasks with an Action Plan Template

Add the tasks tot be performed for similar inspections to an action plan template. You can then use the template to create multiple inspections. For example, for a restaurant license action plan, include fire safety check tasks and hygiene safety check tasks.

Enable Notes

Enable Notes so that your users can add notes during inspections.

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

2. Make sure **Enable Notes** is selected.

3. Click **Save**.

Add the Inspections App to the List of Navigation Items

Add the Inspection App to the items your users can access from the navigation bar.

1. From App Manager, find the Emergency Response Console app and click **Edit**.

2. Click **Navigation Items**, select the Inspection App and move it to Selected Items.

   Note: If Visits is in the Selected Items column, move it back to the unselected column.

3. Save your work.

Customize Inspection App Picklist Values

Add custom picklist values that appear in the Inspection App.

Object	Field	Sample Values
Address	Location Type	Municipal Building, Skilled Nursing Facility, School
Address	Address Type	Mailing, Secured Area
Inspection Assessment Indicator	Result	Pass, Fail, Issue Make sure to select at least one value as a violation

1. In Setup, go to the Object Manager, and select the object to configure.

2. Click **Fields & Relationships**, and select the picklist field.

3. Click **New**, and add picklist values for that field.

4. Repeat these steps for remaining objects.

Create an Emergency Service Regulatory Code

Create regulatory code records for the different codes that pertain to reopening locations or permitting people to access locations.

1. From the App Launcher, find and open **Regulatory Codes**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	Name of the regulatory code.
Subject	Subject of the code.
Description	Description of the code.
Active	Select the checkbox to activate the record.
Effective From	Date from which the code is effective.
Effective To	Date on which the code is no longer effective.

3. Click **Save**.

Create an Emergency Service Assessment Indicator Definition

Each assessment indicator definition is a regulatory standard parameter that the inspector can check during an inspection.

1. From the App Launcher, find and open **Assessment Indicator Definitions**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	Name of the definition, such as `Employees Provided with PPE.`
Description	Description of the indicator definition, such as `Verify that all employees are provided with masks and gloves.`
Indicator Field Type	Data type of the field that contains the assessed value. For example, if the definition can be answered with true or false, then the data type is Boolean.

> **Note:** Only Boolean and String (Text) data types are supported for the **Indicator Field Type** field.

3. Click **Save**.

Create an Emergency Service Regulatory Code Assessment Indicator

Assessment indicators are relevant regulatory standards that are applicable to businesses. Each assessment indicator definition is a regulatory standard parameter that the inspector can check during an inspection. For example, an assessment indicator for a reopening permit can include ensuring that tables in a restaurant are outside and more than 6 feet apart.

1. From the App Launcher, find and open **Regulatory Code Assessment Indicators**, and then click **New**.

2. Complete the following fields.

Field	Description
Regulatory Code	Name of the regulatory code.
Assessment Indicator Definition	The name of the assessment indicator definition, such as `Outdoor Table Spacing.`

3. Click **Save**.

Create Assessment Tasks

Assessment tasks are the individual tasks that are performed during an inspection.

1. From the App Launcher, find and open **Assessment Task**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	The name of the task, such as `Observe tables being sanitized.`
Task Type	The type of the task to be performed during the inspection.
Assessment Task Definition	The name of the associated assessment task definition.

Field	Description
Parent	The visit associated with the assessment task.
Description	The description of the task to be performed during the inspection.
Status	The status of the task.
Sequence	The sequence in which the task must be performed.
Required	Indicates that the task must be performed to complete the inspection.

3. Click **Save**.

Create Assessment Task Definitions

An assessment task definition associates an assessment task with an assessment indicator definition.

1. From the App Launcher, find and open **Assessment Task Definition**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	The name of the assessment task definition.
Task Type	The type of the task to be performed during the inspection.
Assessment Task Definition Task Type	The name of the associated assessment task definition task type.
Assessment Task Definition Description	Description of the assessment task definition.

3. Click **Save**.

Create an Emergency Service Violation Type

Create violation type records for different types of violations recorded during inspections.

1. From the App Launcher, find and open **Violation Type**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	Name of the violation.
Description	Description of the violation.
Type	Type of violation, such as `Health and Safety`.
Severity	Severity of the violation, such as `Major Violation` or `Minor Violation`.

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3. Click **Save**.

Create a Violation Enforcement Action

Create violation enforcement action records to track enforcement actions related to a violation. For example, if a restaurant doesn't have proper social distancing measures, they can be fined or asked to close.

1. From the App Launcher, find and open **Violation Enforcement Action**, and then click **New**.

2. Complete the following fields.

Field	Description
Description	Description of the enforcement action.
Date Created	Date when the action was created.
Type	Type of the enforcement action.
Compliance Due Date	Last date for compliance.
Status	Status of the enforcement action.
Date Resolved	Date when the action was resolved.
Priority	Importance of the enforcement action.
Resolution Notes	Notes related to the action resolution.
Violation	Regulatory code violation.

3. Click **Save**.

Create an Inspection Type

Create inspection type records for the different types of inspections required to issue license and permits.

1. From the App Launcher, find and open **Inspection Type**, and then click **New**.

2. Enter a name and description of the inspection type.

3. Click **Save**.

Create an Inspection Action Plan Template

Create action plan templates with different sets of tasks. You can then use the action plan template to create multiple inspections. For example, you create an action plan template for different license types such as restaurants, hair salons, or retail stores.

1. From the App Launcher, find and open **Action Plan Templates**, and then click **New**.

2. Enter a name and a description for the template.

3. Select the **Target Object** as **Visit**.

4. Select the **Action Plan Type** as **Visit Execution**.

5. Click **Save**.

Associate Tasks with an Action Plan Template

Add the tasks tot be performed for similar inspections to an action plan template. You can then use the template to create multiple inspections. For example, for a restaurant license action plan, include fire safety check tasks and hygiene safety check tasks.

📝 Note: Ensure that you added the required tasks before you publish a template because you can't add tasks to published templates.

1. From the App Launcher, find and open **Action Plan Templates**.

2. Select the required template.

3. Click **Add Tasks**.

4. Select an assessment task definition.

5. Select **Is Required** if you want to make the task mandatory to perform.

6. Click **Save**.

7. Click **Publish Template**.

Associate Tasks with an Action Plan Template

Add the tasks tot be performed for similar inspections to an action plan template. You can then use the template to create multiple inspections. For example, for a restaurant license action plan, include fire safety check tasks and hygiene safety check tasks.

📝 Note: Ensure that you added the required tasks before you publish a template because you can't add tasks to published templates.

1. From the App Launcher, find and open **Action Plan Templates**.

2. Select the required template.

3. Click **Add Tasks**.

4. Select an assessment task definition.

5. Select **Is Required** if you want to make the task mandatory to perform.

6. Click **Save**.

7. Click **Publish Template**.

Set Up Service Execution for Field Responders

After setting up emergency response applications, configure action plans and Visits so your field responders can complete service requests.

Create an Action Plan Template

Create action plan templates with different sets of tasks. You can then use the action plan template to create multiple visits. For example, you can have an action plan template for each type of emergency service you provide, such as emergency supplies or disaster food delivery.

Publish a Template

To use an action plan template to create visits, publish a template. Make sure to add the required tasks before you publish a template as you can't add tasks to published templates.

Create an Action Plan Template

Create action plan templates with different sets of tasks. You can then use the action plan template to create multiple visits. For example, you can have an action plan template for each type of emergency service you provide, such as emergency supplies or disaster food delivery.

1. From the App Launcher, find and open **Action Plan Templates**, and then click **New**.

2. Enter a name and a description for the template.

3. Select the **Target Object** as **Visit**.

4. Select the **Action Plan Type** as **Visit Execution**.

5. Click **Save**.

Publish a Template

To use an action plan template to create visits, publish a template. Make sure to add the required tasks before you publish a template as you can't add tasks to published templates.

1. From the App Launcher, find and open the **Action Plan Templates** item.

2. Select the required template.

3. Review the tasks that you added to the template and click **Publish Template**.

Deliver Emergency Supplies

When someone requests a delivery of food or medicine, make sure that you can deliver it quickly and efficiently.

Configure and Customize Visits

Configure and customize emergency supply dispatch and delivery. Add Action Plans to the Visit page

Configure and Customize Visits

Configure and customize emergency supply dispatch and delivery. Add Action Plans to the Visit page

1.
Click ⚙️ and select **Edit** on the Visit page layout.

In App Builder, select the Action Plans List and drag the component onto the Visit Record Page. Click **Save** and **Activate**.

Add Create New Visit Quick Action Button

Add the Create New Visit button to the Emergency Request page so that you can create a delivery visit and fulfill the request.

1. In Setup, go to the Object Manager and select **Emergency Request**.

2. Under **Buttons, Links, and Actions**, click **New Action**.

    a. For **Action Type**, select Create Record.

    b. For **Target Object**, select Visit

    c. For **Label**, provide the label the user sees, such as `Request Supplies`

    d. For **Name**, type `Create Visit.`
    For example, `New Visit.`

3. Click **Save**.

Configure the Visit Flow Custom Metadata Type

Use the Emergency Request Visit Flow Setting custom metadata type to update the name of the action plan template for a visit using Salesforce Maps.

1. In Setup, enter `Custom Metadata Types` in the Quick Find box, and click **Custom Metadata Types**.

2. Select **Emergency Request Visit Flow Setting**.

3. Update the name of the action plan template to be used when scheduling a visit from Salesforce Maps.

4. Update the event type value to associate with the emergency request in SFMaps Custom Events setting.

5. Save your settings.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

Create a Visit

A visit assigns when a delivery is made and who makes the delivery.

1. From the App Launcher, find and open **Visits**, and then click **New** or create a visit from an individual application.

2. Select and address or a location from the **Place** field. Then select the location for which you are creating the visit.

3. Set a **Visit Priority**.

4. Optionally, select the account to which the location belongs.

5. Select whether the delivery is related to an individual or a business request in the Context field.

6. Select the type of visit.

7. Set the date and time that you expect the visit to start. The actual start time can vary based on runtime activity of the driver.

8. Set the date and time that you expect the visit to end.

9. Provide **Special Instructions** to the delivery person.

10. Select **People** from the **Visitor** list. Then select the name of the field responder that you want to assign for this visit.

11. Click **Save**.

Add Action Plans to the Visit Page

Add the Action Plan component to the Visit page so that you can define the tasks associated with an emergency service request.

1. Click 🔧 and select **Edit** on the Visit page to launch Lightning App Builder.

   In App Builder, select the Action Plans List and drag the component onto the Visit Record Page. Click **Save** and **Activate**.

2. Set the page as the org default page so that it's used for all Visit records.

3. Select **Desktop** as the form factor for the default page.

Create Training Courses

Create records for classes authorized by a government authority that qualify a license or permit.

1. From the App Launcher, find and open **Training Course**, and then click **New**.

2. Complete the following fields.

Field	Description
Name	The name of the course, such as `Returning to Workplace`.
Description	The description of the course.
Status	Status of the course offering such as `Active`.
Total Credits	Number of credits offered for the course.
Total Hours	Hours required to complete the course.

3. Click **Save**.

Use Salesforce Maps for Efficient Emergency Service Delivery

Give emergency supplies delivery personnel precise location information so that they can get important emergency supplies to the people who request it. Salesforce Maps injects location intelligence into field operations to make emergency supply delivery services more efficient. The Create a Visit for Emergency Request Event flow ties the emergency request record to the event. When an emergency event is created, the Schedule an Emergency Visit process starts the flow. The flow creates the visit record, applies the action plan template, and creates the tasks.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

Install Salesforce Maps

Get the Salesforce Maps managed package installed before you configure it for your users.

Create Base Objects to Plot on Maps

In addition to the commonly used base objects that Salesforce Maps plots for you, you can add other objects that help your reps in the field. Base objects can represent either Salesforce objects that include addresses, or Salesforce objects that look up to ones that include addresses.

Configure the Visit Flow Custom Metadata Type

Use the Emergency Request Visit Flow Setting custom metadata type to update the name of the action plan template for a visit using Salesforce Maps.

Additional Configurations for Salesforce Maps

Follow these steps for extra configurations required to use Salesforce Maps in Emergency Program Management.

Create Shape Layers

To see and manage geographic areas on a map, select and filter shape layers.

SEE ALSO:

Salesforce Help: Salesforce Maps Products for Managers and Administrators

Install Salesforce Maps

Get the Salesforce Maps managed package installed before you configure it for your users.

1. Click the installation URL that you received in an email message after you submitted the Salesforce Maps order form email. Then log in to Salesforce.

2. Select **Install for Admins Only**.

3. Click **Install**.

4. Select **Yes, grant access to these third party websites** and click **Continue**.

5. If a message indicates that the installation is taking longer than expected, click **Done**.

   We send you an email notification after the installation finishes. The installed package appears as a trial for up to 72 hours.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

USER PERMISSIONS

To install packages:
- Download AppExchange Packages

To configure installed packages:
- Customize Application

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Create Base Objects to Plot on Maps

In addition to the commonly used base objects that Salesforce Maps plots for you, you can add other objects that help your reps in the field. Base objects can represent either Salesforce objects that include addresses, or Salesforce objects that look up to ones that include addresses.

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

2. Click **Configure** next to the Salesforce Maps package.

3. Select **Base Object** > **Create New**.

4. Select the Emergency Request object.

5. Enter a name. Then select an address location based on either the corresponding Salesforce object or a related Salesforce record's ID.

6. Select the address and coordinate the options that you want maps to reference. Select among standard and custom address fields.

7. Save your changes.

Configure the Visit Flow Custom Metadata Type

Use the Emergency Request Visit Flow Setting custom metadata type to update the name of the action plan template for a visit using Salesforce Maps.

1. In Setup, enter `Custom Metadata Types` in the Quick Find box, and click **Custom Metadata Types**.

2. Select **Emergency Request Visit Flow Setting**.

3. Update the name of the action plan template to be used when scheduling a visit from Salesforce Maps.

4. Update the event type value to associate with the emergency request in SFMaps Custom Events setting.

5. Save your settings.

Additional Configurations for Salesforce Maps

Follow these steps for extra configurations required to use Salesforce Maps in Emergency Program Management.

1. Create Salesforce Maps base objects for the emergency request.

2. In Object Manager, select the Event object and add the value `Emergency Request Visit` to the Type field picklist. Set the field access to **Read Only** for users and **Visible** for the System Administrator.

3. Schedule and activate the Schedule an Emergency Visit process in Process Builder.

4. From Setup, enter `Flow` in the `Quick Find` box, then select **Flows**. Select and activate the Create a Visit for Emergency Request Event flow.

5. Associate the Emergency Request Visit type events to the Emergency Request.

   Specify that the event type is `Emergency Request Visits`.

6. Create records for Emergency Request and a Marker layer in Salesforce Maps that uses Emergency Request as the base object.

   a. Navigate to the Maps tab in Salesforce Maps.

b. To save the marker layer privately so only you can see it, click **Saved** | **Personal**.

c. Hover over New and select **Marker Layer**.

d. Select Emergency Request as the base object

e. Select filters, if necessary.

Create Shape Layers

To see and manage geographic areas on a map, select and filter shape layers.

1. Click **Layers**.

2. To save the shape layer privately so only you can see it, click **Saved** > **Personal**. Or, to share the shape layer with other maps users, click **Saved** > **Corporate**.

3. Hover over **New** and select **Shape Layer**.
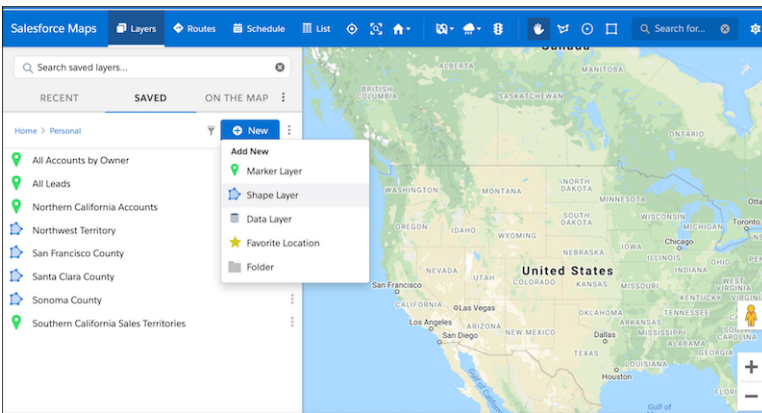
4. Enter a name and description.

5. Click **Next**.

6. Select a shape using filters, drawing on the map, or pasting postal codes.

   For example, to see all the neighborhoods in San Francisco, select **United States** > **Neighborhoods**, and then add a county filter.
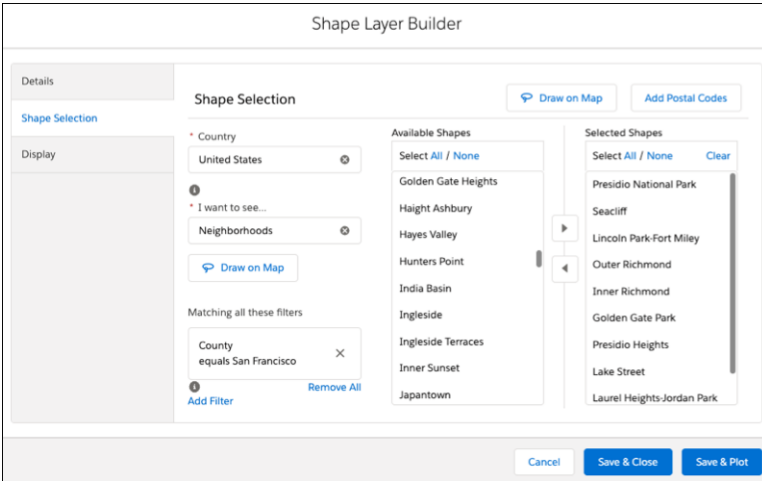
7. To create a label, adjust colors, and change other options for how your shape layer looks, click **Display**.
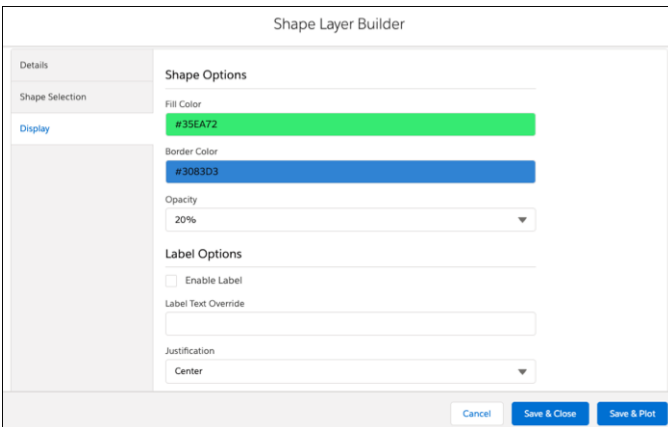
8. Save and plot your changes.
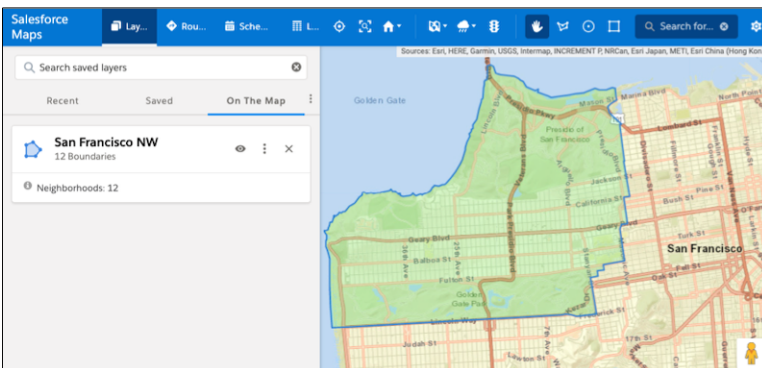
CONFIGURE VOLUNTEER MANAGEMENT

With Volunteer Management, you can manage volunteer projects within Salesforce and make them visible on your Experience Cloud website. Volunteers can sign up for volunteer projects on your site and update their time spent on volunteer activities.

Volunteer Management helps you manage volunteer projects at scale and amplify reach by sharing volunteering opportunities to external sites. You can identify, create, and publish volunteer project information on your Experience Cloud website. You can also easily assign a contact to a volunteer project within Salesforce.
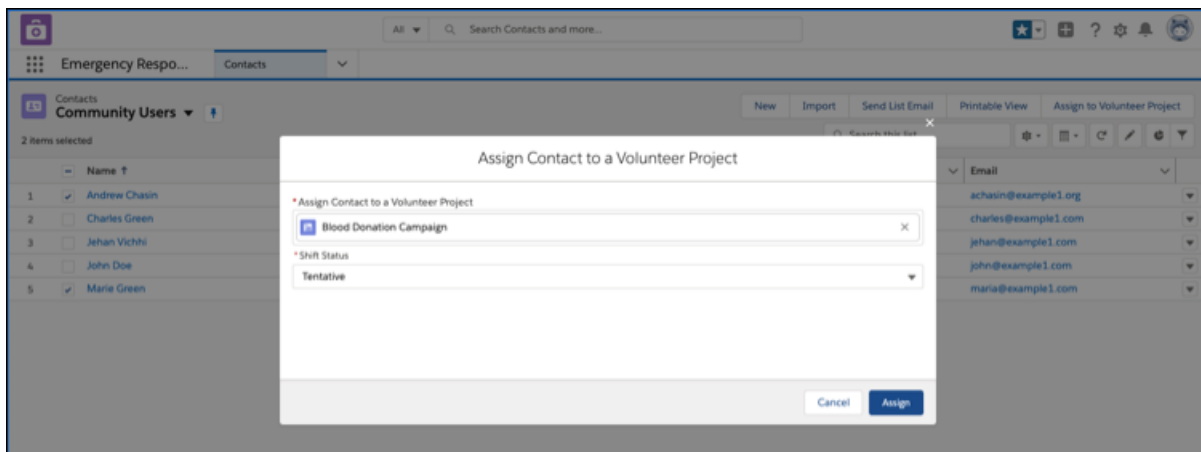
Volunteers can easily search the list of available volunteer projects, sign up for those that they're interested in, or accept assignments.
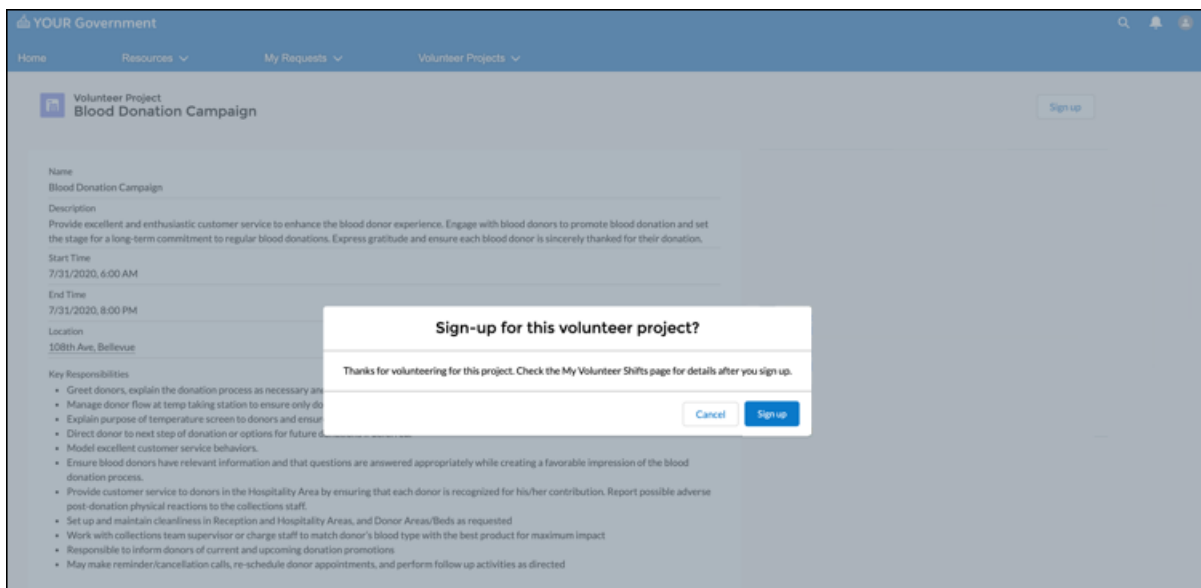
With just a few clicks, volunteers can view and update information about activities they signed up for. They can update the start and end times, add completed hours, or add information about a project.

Assign Permission Sets and Permission Set Licenses

With permission set licenses, users can get more features than with the basic license. To enable users to work with Volunteer Projects and Volunteer Shifts, assign them the necessary permission set licenses.

Assign User Profile and User License for Volunteers

To enable volunteers to work with Volunteer Projects and Volunteer Shifts, assign them the necessary user profile and user license.

Set Up Volunteer Management for Your Site

Set up your Emergency Response site to include Volunteer Projects and Volunteer Shifts. Allow volunteers to view and sign up for volunteer projects. Enable volunteers to view and perform various volunteer-shift-related updates such as updating completed hours, changing the status, or uploading a file attachment.

Configure the Standard ERM User Profile

Enable access for ERM users who coordinate Volunteer Management projects and shifts.

Configure Volunteer Shift Cancellation Settings

Automatically update the number of registered volunteers and volunteers needed when shifts are canceled.

Configure the Default Shift Status

Set the default status for the shift record when a volunteer signs up for a volunteer project from the site.

Assign Permission Sets and Permission Set Licenses

With permission set licenses, users can get more features than with the basic license. To enable users to work with Volunteer Projects and Volunteer Shifts, assign them the necessary permission set licenses.

1. In Setup, in the Quick Find box select **Users**, and then click the user name that you want to assign permission set licenses to.

2. In the Permission Set License Assignments section of the User record, click **Edit Assignments**.

3. Select one or more permission set licenses to assign.

   For volunteers (site users), make sure to select the Public Sector For Community permission set license.

   For government employees (internal Salesforce users), make sure to select the Emergency Response for Public Sector permission set license.

4. Save your changes.

   💡 Tip: To see what permission set licenses are available, go to Company Settings in Setup and click **Company Information**. The permission sets available to you depend in part on which features are included in your Salesforce contract.

5. For government employees (internal Salesforce users), make sure to assign the EmergencyResponseMgmt permission set.

   a. In Setup, in the Quick Find box select **Users** and then click the user name that you want to assign the permission set to.

   b. In the Permission Set Assignments section of the User record, click **Edit Assignments**.

   a. Add the EmergencyResponseMgmt permission set.

   a. Save your changes.

Assign User Profile and User License for Volunteers

To enable volunteers to work with Volunteer Projects and Volunteer Shifts, assign them the necessary user profile and user license.

To give volunteers (site users) access to the information they need, assign them the following:

• Customer Community Plus user license
• ERM Customer Site Plus user profile
• Public Sector For Community permission set license

1. In Setup, in the Quick Find box select **Users**, and click the user name that you want to configure the user profile and user license for, and then click **Edit**.

2. In the User License field, select Customer Community Plus.

3. In the Profile field, select ERM Customer Site Plus User.

4. Save your changes.

Set Up Volunteer Management for Your Site

Set up your Emergency Response site to include Volunteer Projects and Volunteer Shifts. Allow volunteers to view and sign up for volunteer projects. Enable volunteers to view and perform various volunteer-shift-related updates such as updating completed hours, changing the status, or uploading a file attachment.

Prerequisites

Complete the setup and configuration of the Emergency Program Management site before setting up Volunteer Management for your site.

Create Page Layouts

Create page layouts for your Volunteer Project and Volunteer Shift pages. Page layouts control the organization of components on a page such as fields, buttons, custom links, and lists. Page layouts also help determine which fields are visible, read only, and required.

Configure the Community User Profile

Configure the Community User Profile to enable access to the tabs and page layouts that the volunteers can work with.

Configure the Guest User Profile

You can use a guest user profile to control public access to data, content, and objects in your site that don't require authentication. For example, you can configure the Guest User Profile to enable existing and potential volunteers to view volunteer projects without logging in to the site.

Set Up Self-Registration for Your Site

Enable self-registration so unlicensed guest users can join your site.

Configure the Volunteer Management Site Pages

Update the pages of your site to provide critical information for volunteers.

Configure the Location Type Picklist

Enable access for ERM users who coordinate Volunteer Management projects and shifts.

Configure Sharing Settings

Make automatic exceptions to your organization-wide sharing settings and give access to a defined set of users.

Configure Default Navigation Access Levels

Set up the default navigation access levels to make required pages publicly available.

Create Page Layouts

Create page layouts for your Volunteer Project and Volunteer Shift pages. Page layouts control the organization of components on a page such as fields, buttons, custom links, and lists. Page layouts also help determine which fields are visible, read only, and required.

Prerequisites

You must complete the setup and configuration for the Emergency Program Management site before creating page layouts for Volunteer Management.

Create the Volunteer Project Page Layout

The Volunteer Project page lets volunteers view and sign up for volunteer projects. Configure the layout and organization of components on the Volunteer Project page such as fields, buttons, custom links, and lists.

Create the Volunteer Shift Page Layout

The Volunteer Shift page lets volunteers view and update their volunteer activity information (Shift object). Configure the layout and organization of the components on the Volunteer Shift page such as fields, buttons, custom links, and lists.

Create the Volunteer Project Page Layout

The Volunteer Project page lets volunteers view and sign up for volunteer projects. Configure the layout and organization of components on the Volunteer Project page such as fields, buttons, custom links, and lists.

Complete the setup and configuration for the Emergency Program Management site before creating page layouts for Volunteer Management.

1. From Setup, open **Object Manager**, and use Quick Find to search for the Volunteer Project object.

2. Click **Page Layouts** and then click **New**.

3. Enter a name for this page layout and select an existing page layout to clone, if desired.

4. Save your changes.

5. Customize and organize the page layout. Add fields, buttons, custom links, and lists that you want to include on the Volunteer Project site page.

6. In the Volunteer Project Detail section, make sure that the Sign up button is included in the list of standard buttons.

7. Save your changes.

Create the Volunteer Shift Page Layout

The Volunteer Shift page lets volunteers view and update their volunteer activity information (Shift object). Configure the layout and organization of the components on the Volunteer Shift page such as fields, buttons, custom links, and lists.

Complete the setup and configuration for the Emergency Program Management site before creating page layouts for Volunteer Management.

1. From Setup, open **Object Manager**, and use Quick Find to search for the Shift object.

2. Click **Page Layouts** and then click **New**.

3. Enter a name for this page layout, and select an existing page layout to clone, if desired.

4. Save your changes.

5. Customize and organize the page layout. Add fields, buttons, custom links, and lists per your requirement for the Volunteer Shift site page.

6. In the Shift Detail section, ensure that the Edit button is included in the list of standard buttons.

7. Save your changes.

Configure the Community User Profile

Configure the Community User Profile to enable access to the tabs and page layouts that the volunteers can work with.

Complete setting up and configuring a profile for your Emergency Response portal by cloning the Customer Community Plus user profile.

1. In Setup, find **Profiles** and select the user profile that you created for your Emergency Response portal.

2. Assign the following page layouts.

- Edit the Volunteer Profile page layout assignment and assign the Volunteer Project page layout.
- Edit the Shift page layout assignment and assign the Volunteer Shift page layout.

3. Configure the following object permissions:

Object	Access Level
Volunteer Projects	Read
Shifts	Read, Create, Edit
Service Resource	Read, Create (disable Edit and Delete)
Location	Read
Address	Read

4. Configure the following record type settings:

Record Type Setting	Selected Record Types
Shift	Volunteer Shift
Service Resource	Volunteer

5. In General User Permissions, for Emergency Requests, select **Provides access to Public Sector data for Community users**.

6. Save your changes.

Configure the Guest User Profile

You can use a guest user profile to control public access to data, content, and objects in your site that don't require authentication. For example, you can configure the Guest User Profile to enable existing and potential volunteers to view volunteer projects without logging in to the site.

Use care when sharing data with guest users. Salesforce defaults are most restrictive for guest users, and it's your choice if and when to share data with guests. To secure your site for guest users, consider all the use cases and implications and implement security controls that you think are appropriate for the sensitivity of your data.

1. In Salesforce Setup, enter `sites` in the Quick Find box and select **All Sites**.

2. Next to the site that you want to access, click **Builder**.

3. In Experience Builder, click the Settings icon and select **General**.

4. Under Guest User Profile, click the guest user profile link.

5. Scroll to the Page Layouts section, edit the Volunteer Project page layout assignment, and assign the Volunteer Project page layout.

   > **Note:** If you are unable to see the Volunteer Project object while configuring the guest user profile, ensure that you enabled **Enhanced Profile User Interface** in the User Management Settings.

6. Scroll to the Standard Object Permissions section, and change the object permissions to meet your business needs. Ensure that you configure the following object permissions:

Object	Access Level
Volunteer Projects	Read
Location	Read
Address	Read

   > **Note:** If you are unable to see the Volunteer Project object while configuring the guest user profile, ensure that you enabled Enhanced Profile User Interface in the User Management Settings.

7. Save your changes.

Set Up Self-Registration for Your Site

Enable self-registration so unlicensed guest users can join your site.

You must complete setting up and configuring a profile for your Emergency Response portal by cloning the Customer Community Plus user profile.

1. Configure Your Self-Registration Page.

2. Configure Person Accounts for Self-Registration.

   > **Note:** In the Profile field, select the profile that you created for your Emergency Response portal by cloning the Customer Community Plus user profile, and leave the Account field blank.

USER PERMISSIONS

To access Experience Workspaces:
- Create and Set Up Communities

  AND

  Is a member of the community

To edit app and system permissions in profiles:
- Manage Profiles and Permission Sets

To edit object and field permissions in profiles:
- Manage Profiles and Permission Sets

  AND

  Customize Application

Configure the Volunteer Management Site Pages

Update the pages of your site to provide critical information for volunteers.

You edit the pages of your site in Experience Builder, where you can add content, create custom pages, and update theme properties such as colors and fonts.

To get to Experience Builder from Setup, enter `All` in the Quick Find box, select **All Sites**, and then click **Builder** next to the site that you want to customize. Or if you're in Experience Workspaces, click the **Builder** tile.

- Explore the Home page and click through the page sections and components.

- When you click an item on the page, its properties panel opens. Update the component's contents or properties as needed.

- Open the Pages menu on the top toolbar and scroll through the pages. To open a page for editing, click the page. To access the properties of a page, click ⚙ ▾ on the top toolbar.

- Click ⚡ to open the Components panel and drag components onto the page.

- To add content to your pages, you can use the Rich Content Editor and the HTML Editor components. Alternatively, you can create content in Salesforce CMS and Salesforce Knowledge and add it to your pages. As a rule, create content such as blogs, announcements, and news articles in Salesforce CMS. Create help articles such as FAQs and how-tos in Salesforce Knowledge.

Configure the Volunteer Project Page

Configure the Volunteer Project page to provide the list of volunteer projects available.

1. In the Emergency Response Console, navigate to the Volunteer Projects page.

2. Create a new list view.

    a. Under List View Controls, select **New**. Or, click **Clone** to make a copy of the current list view.

    b. Give your list a name and a unique API name.

    c. Choose who can see this list view. Select **All users can see this list view**.

    d. Save your changes.

3. Add and set filters to view only available volunteer projects. You have different options depending on the field you want to filter and the operator you choose.

    a. Click **Add Filter**.

    b. Select the field to filter, an operator, and a value. Add the following filter criteria:

- Status equals Active
- Publish to community equals True
- Volunteers Still Needed greater than 0

Depending on the type of field you selected, you can either select a value or enter a value.

    c. Click **Done**.

    d. Save your changes. The view appears in the list view dropdown list so you can access it later.

4. Optionally, choose and order the columns in your list view.

    a. From the List View Controls menu, **Select Fields to Display**.

    b. Use the arrows to add, remove, and reorder your visible fields.

    c. Save your changes.

5. In Experience Builder, update the Record List settings for the Volunteer Projects page.

    a. From the Pages menu in the top toolbar, select the Volunteer Projects page.

    b. To edit the properties for the record list, select it on the main page canvas or on the Page Structure panel. The Record List pane appears.

    c. In the Filter Name field, select the filter list view that you created in Step 2 to display the list of available volunteer projects.

6. In Experience Builder, make sure that the Volunteer Project page is publicly available.

Configure the Shifts Page

Configure the Shifts page to provide the list of all volunteer shifts.

1. In the Emergency Response Console, navigate to the Volunteer Shifts page.

2. Create a new list view.

    a. Under List View Controls, select **New**. Or, click **Clone** to make a copy of the current list view.

    b. Give your list a name and unique API name.

    c. Choose who can see this list view. Select **Share list view with groups of users** and share the list only with the customer portal group of users.

    d. Save your changes.

3. Edit the filter to list all shift details.

    a. In the Filters pane, click **Filter by Owner**, and then click **All volunteer shifts**.

    b. Click **Done**.

    c. Save your changes. The view appears in the list view dropdown list so you can access it later.

4. As the list filter does not show fields with a Polymorphic value, create a custom formula field that uses the value of the Related To field.

5. Optionally, choose and order the columns in your list view.

    a. From the List View Controls menu, **Select Fields to Display**.

    b. Add the custom formula field that you created in step 4.

    c. Use the arrows to add, remove, and reorder your visible fields.

USER PERMISSIONS

To create, customize, and publish a site:
- Create and Set Up Experiences

    AND

    View Setup and Configuration

    d. Save your changes.

6. In Experience Builder, update the Record List settings for the Volunteer Shifts page.

    a. From the Pages menu in the top toolbar, select the My Volunteer Shifts page.

    b. To edit the properties for the record list, select it on the main page canvas or on the Page Structure panel. The Record List pane appears.

    c. In the Filter Name field, select the filter list view that you created in Step 2 to display all shift details.

7. In Experience Builder, make sure that the Volunteer Project page requires that members log in to the site and the page is not publicly available.

Configure the Volunteer Project Details Page

Set up the Volunteer Project Details page to customize the page layout and provide volunteer project details for your volunteers.

1. In Experience Builder, open the Pages menu on the top toolbar.

2. Click **New Page** at the bottom of the Pages menu.

> **USER PERMISSIONS**
>
> To create, customize, and publish a site:
> - Create and Set Up Experiences
>
>   AND
>
>   View Setup and Configuration

3. Click **Object Pages**.

4. Select **Volunteer Project** from the list of pages, and then click **Create**.

5. Add and configure the page components and page layout.

   a. Update the Record Information tabs to show relevant content. In Experience Builder, open the Pages menu on the top toolbar, and click the **Volunteer Project** object. Click the Volunteer Project Details page that you created, and update the record information tabs.

   b. Optionally, in Experience Builder, in the Volunteer Project Details page properties, select **HomePage** as the theme layout.

   c. Optionally, in Object Manager, create a new compact layout for the Volunteer Project object to be visible in the experience site. Make sure that only relevant fields are added. Set this layout as the primary compact layout by updating the compact layout assignment.

6. In Experience Builder, make sure that the Volunteer Project Details page is publicly available.

7. Preview and publish your site.

Configure the Volunteer Shift Details Page

Configure the Volunteer Shift Details page to customize the page layout and provide shift details for your volunteers.

1. In Experience Builder, open the Pages menu on the top toolbar.
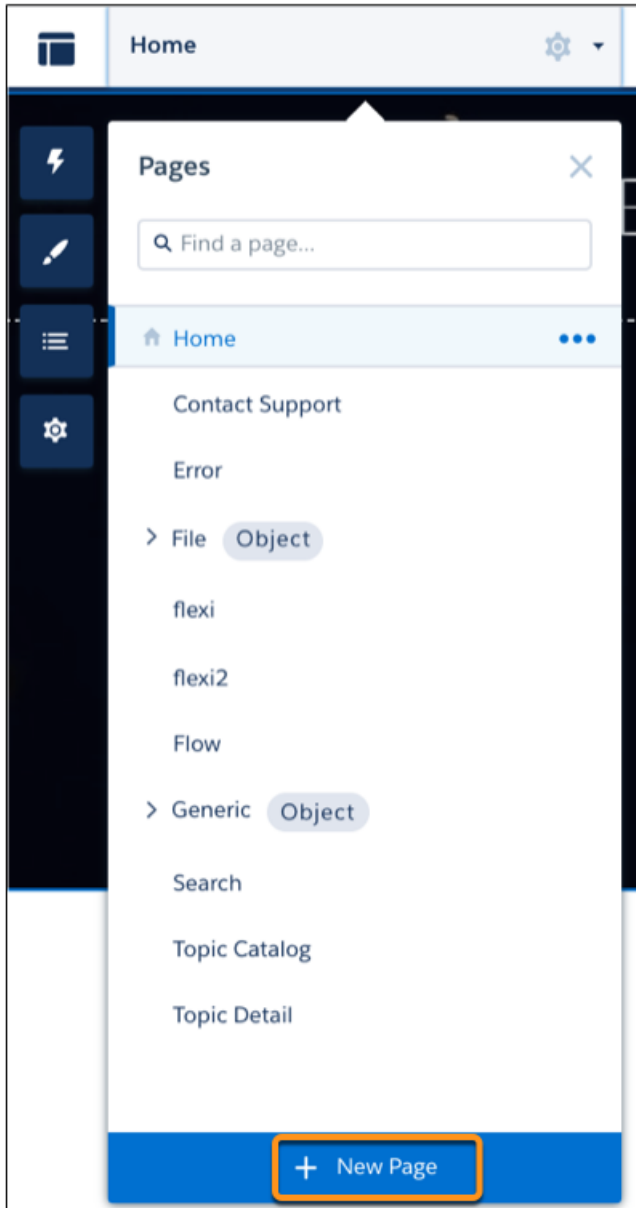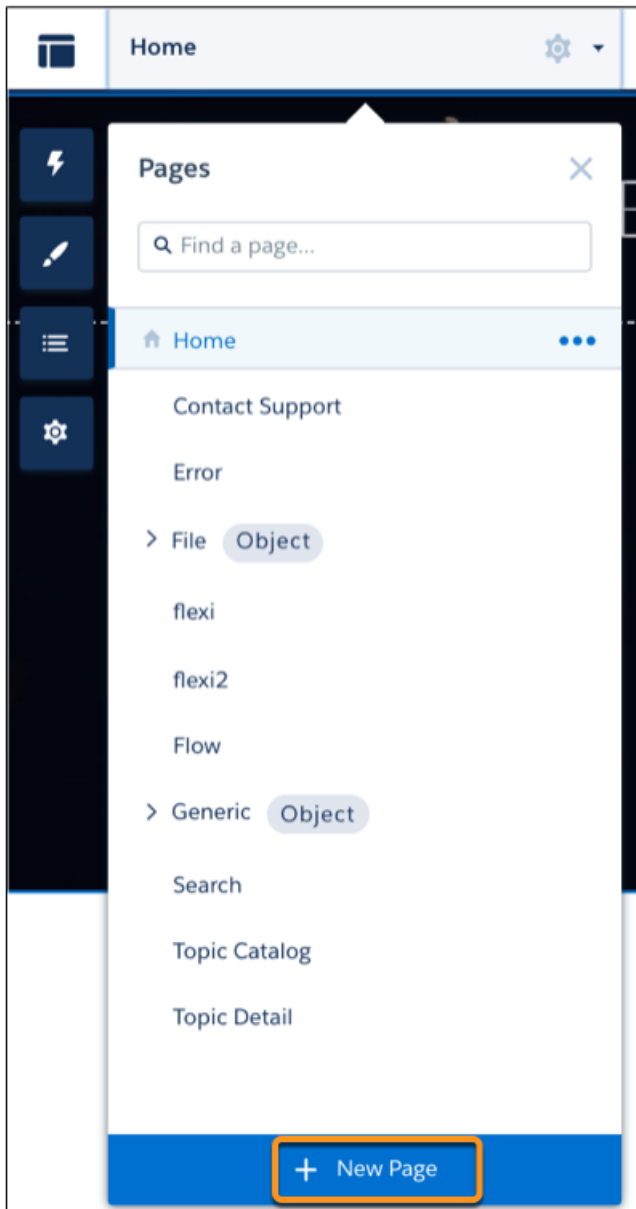
2. Click **New Page** at the bottom of the Pages menu.

3. Click **Object Pages**.

4. Select **Shift** from the list of pages, and then click **Create**.

5. Add and configure the page components and page layout.

   a. Update the Record Information tabs to show relevant content. In Experience Builder, open the Pages menu on the top toolbar, and click the **Volunteer Shift** object. Click the Volunteer Shift Details page that you created, and update the record information tabs.

   b. Optionally, in Experience Builder, in the Volunteer Shift Details page properties, select **HomePage** as the theme layout.

   c. Optionally, in Object Manager, create a new compact layout for the Shift object to be visible in the site. Make sure that only relevant fields are added. Set this layout as the compact layout by updating the compact layout assignment.

6. In Experience Builder, make sure that the Volunteer Shift Details page requires that members log in to the site and the page is not publicly available.

7. Preview and publish your site.

Configure the Location Type Picklist

Enable access for ERM users who coordinate Volunteer Management projects and shifts.

1. In Setup, click the Object Manager tab, and then select the **Location** object.

2. Click **Fields & Relationships**, and then select the **Location Type** picklist.

3. In the Location Type Picklist Values section, click **New**.

4. Add one or more picklist values for the volunteering location.

5. Save your changes.

Configure Sharing Settings

Make automatic exceptions to your organization-wide sharing settings and give access to a defined set of users.

Complete configuring the Location Type picklist before configuring sharing settings.

1. Create the Volunteer Project sharing rule for guest site users.

   a. From Setup, enter *Sharing Settings* in the Quick Find box, then select **Sharing Settings**.

   b. In the Volunteer Project Sharing Rules section, click **New**.

   c. Enter the label name and rule name. The label name appears on the user interface. The rule name is a unique name used by the API and managed packages.

   d. Optionally, enter a description of the sharing rule, up to 1,000 characters.

   e. Select the **Guest user access based on criteria** rule type.

   f. Specify the field, operator, and value criteria that records must match to be included in the sharing rule. Specify the following criteria:

Field	Operator	Value
Status	equals	0
Publish to community	equals	True

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    g. In the Share with field, select the guest user profile.

    h. In the Access Level field, select **Read Only**.

    i. Save your changes.

2. Create the Volunteer Project sharing rule for site users who log on to the site.

    a. On the Sharing Settings page, scroll to the Volunteer Project Sharing Rules section, and then click **New**.

    b. Enter the label name and rule name. The label name appears on the user interface. The rule name is a unique name used by the API and managed packages.

    c. Optionally, enter a description of the sharing rule, up to 1,000 characters.

    d. Select the **Based on criteria** rule type.

    e. Specify the field, operator, and value criteria that records must match to be included in the sharing rule. Specify the following criteria:

Field	Operator	Value
Publish to community	equals	True

    f. In the Share with field, select **Public Groups** and **All Customer Portal Users**.

    g. In the Access Level field, select **Read Only**.

    h. Save your changes.

3. Create the Location sharing rule for guest site users.

    a. On the Sharing Settings page, scroll to the Location Sharing Rules section, and then click **New**.

    b. Enter the label name and rule name. The label name appears on the user interface. The rule name is a unique name used by the API and managed packages.

    c. Optionally, enter a description of the sharing rule, up to 1,000 characters.

    d. Select the **Guest user access based on criteria** rule type.

    e. Specify the field, operator, and value criteria that records must match to be included in the sharing rule. Specify the following criteria:

Field	Operator	Value
Location Type	equals	One or more values set in the Location Type picklist that are volunteering locations.

    f. In the Share with field, select the guest user profile.

    g. In the Access Level field, select **Read Only**.

    h. Save your changes.

4. Create the Location sharing rule for site users who log on to the site.

    a. On the Sharing Settings page, scroll to the Location Sharing Rules section, and then click **New**.

b. Enter the label name and rule name. The label name appears on the user interface. The rule name is a unique name used by the API and managed packages.

c. Optionally, enter a description of the sharing rule, up to 1,000 characters.

d. Select the **Based on criteria** rule type.

e. Specify the field, operator, and value criteria that records must match to be included in the sharing rule. Specify the following criteria:

Field	Operator	Value
Location Type	equals	One or more values set in the Location Type picklist that are volunteering locations.

f. In the Share with field, select **Public Groups** and **All Customer Portal Users**.

g. In the Access Level field, select **Read Only**.

h. Save your changes.

Configure Default Navigation Access Levels

Set up the default navigation access levels to make required pages publicly available.

1. In Experience Builder, click the Settings icon.

2. In the Settings pane, click **Navigation**.

3. Click the arrow next to **Default Navigation**, and then click **Edit**.

4. In the Menu Structure, click **Volunteer Projects** and make sure that **Publicly available** is selected.

5. Click **Available Volunteer Projects** and make sure that **Publicly available** is selected.

6. Click **My Volunteer Shifts** and make sure that **Publicly available** is not selected.

7. Save your changes.

USER PERMISSIONS

To create, customize, and publish a site:
- Create and Set Up Communities

  AND

  View Setup and Configuration

Configure the Standard ERM User Profile

Enable access for ERM users who coordinate Volunteer Management projects and shifts.

Complete configuring the Standard ERM User Profile.

1. In Setup, find **Profiles** and select the Standard ERM User Profile.

2. Assign the following page layouts.

- Edit the Volunteer Project page layout assignment and assign the Volunteer Project page layout.
- Edit the Shift page layout assignment and assign the Volunteer Shift page layout.
- Edit the Service Resource page layout assignment (optional) and assign the Volunteer Layout.

3. Configure the following object permissions:

Object	Access Level
Volunteer Projects	Read, Create, Edit, Delete
Shifts	Read, Create, Edit, Delete
Service Resource	Read, Create, Edit, Delete

4. Configure the following record type settings:

Record Type Setting	Selected Record Types
Shift	Volunteer Shift
Service Resource	Volunteer

5. Configure the following field-level security settings:

Object	Field Name	Access Level
Volunteer Project	Volunteers Registered	Read, Edit
Volunteer Project	Volunteers Still Needed	Read
Shift	Volunteer	Read, Edit

6. Save your changes.

Configure Volunteer Shift Cancellation Settings

Automatically update the number of registered volunteers and volunteers needed when shifts are canceled.

USER PERMISSIONS

To create or edit custom metadata:
- Customize Application

1. Configure the Volunteer Shift Cancellation Status custom metadata type.

   a. In Setup, enter `Custom Metadata Types` in the Quick Find box, and click **Custom Metadata Types**.

   b. Select **Volunteer Shift Cancellation Status**, and click **Manage Volunteer Shift Cancellation Statuses**.

   c. Click **New**.

   d. Enter the following values for these fields.

Field Name	Field Value
Label	Enter a label for the custom metadata type setting.
Volunteer Shift Cancellation Status Name	Enter an API name for the custom metadata type setting.
Status	Enter a value that indicates cancellation of a shift. For example, `Canceled`.

    e. Save your changes.

2. Create a new Apex trigger or update an existing Apex trigger on the Shift object.

    a. In Setup, enter Apex Classes in the Quick Find box, and click VolunteerProjUserManager.

    b. Make a note of the class name and namespace prefix. You need this information for the class name in the trigger code.

    c. In the Developer Console, click **File | New | Apex Trigger**.

    d. Enter a name for this trigger, and then select **Shift** in the sObject field. Click **Submit**.

    e. Replace the sample code with the following code:

```
trigger UpdateVolunteersRegistered on Shift (after insert, after update, after delete)

{NamespacePrefix.VolunteerProjUserManager.updateVolunteersRegisteredCount(Trigger.operationType,
 Trigger.Old, Trigger.oldMap, Trigger.New, Trigger.newMap);}
```

> 📝 **Note:** Replace NamespacePrefix with the namespace prefix that you noted in Step 2.b.

    f. Save your changes.

We recommend creating a flow to cancel Volunteer Shift records when the associated volunteer project gets canceled.

Configure the Default Shift Status

Set the default status for the shift record when a volunteer signs up for a volunteer project from the site.

1. In Setup, enter *Custom Metadata Types* in the Quick Find box, and click **Custom Metadata Types**.

2. Select **Volunteer Shift Default Status**, and click **Manage Volunteer Shift Default Statuses**.

3. Click **New**.

4. Enter the following values for these fields.

USER PERMISSIONS

To create or edit custom metadata:
- Customize Application

Field Name	Field Value
Label	Enter a label for the custom metadata type setting.
Status	Enter the default status for the shift record when a volunteer signs up for a volunteer project from the site. For example, *Planned*.
Volunteer Shift Default Status Name	Enter an API name for the custom metadata type setting.

5. Save your changes.

DEPLOY ANALYTICS FOR EMERGENCY PROGRAM MANAGEMENT

Before you create an app from the Analytics for Emergency Program Management template and use the dashboards, deploy Analytics for Emergency Program Management in your Salesforce org.

💡 **Tip:** Follow the steps in the order shown to deploy Analytics for Emergency Program Management. If you haven't used CRM Analytics before, learn about it here: Salesforce Help.

Enable CRM Analytics

Before you create an app from the Analytics for Emergency Program Management template, enable CRM Analytics in your Salesforce org.

Assign Analytics for Emergency Program Management Administrator Permissions

Enable admins to create and manage Analytics for Emergency Program Management app by assigning the relevant permissions.

Grant Permission to the Analytics Integration User

If your org is using Health Cloud or Emergency Program Management for Public Health, assign the Health Cloud ERM permission set to the Analytics Integration User.

The Data Needed to Create the Analytics for Emergency Program Management App

Data in your Salesforce org has to meet specific requirements before you can create Analytics for Emergency Program Management.

Set Field-Level Security to Enable Creation of the Analytics for Emergency Program Management App

Before you create the Analytics for Emergency Program Management app, make sure that the Analytics Cloud Integration User profile has access to all fields in the app.

Create an App from the Analytics for Emergency Response Template

Create an app from the Analytics for Emergency Program Management template.

Share the Analytics for Emergency Response Template App

After you create the app, share it with users in your organization. You can share it only with users assigned the admin or user permission sets for Analytics for Emergency Program Management.

Schedule the Dataflow for the App

The app creation process includes a dataflow that imports the latest data to CRM Analytics. Schedule the app refresh to run every day to ensure that your app uses up-to-date data.

Understand Analytics for Emergency Program Management Limitations

The Analytics for Emergency Program Management app gives you access to most CRM Analytics capabilities and features, but with limitations.

Enable CRM Analytics

Before you create an app from the Analytics for Emergency Program Management template, enable CRM Analytics in your Salesforce org.

📝 **Note:** If you see the Launch CRM Analytics button, CRM Analytics is already enabled. You can skip to Assign Analytics for Emergency Program Management Administrator Permissions.

1. From Setup, enter `Getting Started` in the Quick Find box, and then select **Getting Started** under Analytics.

2. Click **Enable CRM Analytics**.

Assign Analytics for Emergency Program Management Administrator Permissions

Enable admins to create and manage Analytics for Emergency Program Management app by assigning the relevant permissions.

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

2. Click the name of a user with the System Administrator profile.

3. Click **Permission Set Assignments** and then click **Edit Assignments**.

4. Select both the **CRM Analytics Plus Admin** and **ERM Analytics Admin** permission sets.

5. Click **Add**, then click **Save**.

6. Repeat Steps 2–5 for all users who create and manage the Analytics for Emergency Program Management app.

> 📝 **Note:** For Analytics Cloud Integration User, add the Action Plan permission set.

Grant Permission to the Analytics Integration User

If your org is using Health Cloud or Emergency Program Management for Public Health, assign the Health Cloud ERM permission set to the Analytics Integration User.

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

2. Select the Analytics Integration User.

3. Go to Permission Set Assignments and then click **Edit Assignments**.

4. Select the **Health Cloud ERM Analytics** permission set.

5. Click **Add**, then click **Save**.

The Data Needed to Create the Analytics for Emergency Program Management App

Data in your Salesforce org has to meet specific requirements before you can create Analytics for Emergency Program Management.

Your org must have at least one record in each of the following objects:

- Account
- Lead (for Emergency Program Management for Public Health only)
- Emergency Request
- Individual Application

While creating the app, if your org's data doesn't meet the minimum requirements, you see a message describing what to fix.

Set Field-Level Security to Enable Creation of the Analytics for Emergency Program Management App

Before you create the Analytics for Emergency Program Management app, make sure that the Analytics Cloud Integration User profile has access to all fields in the app.

If users don't have proper field-level security permissions when they run a dataflow, the dataflow can fail. Here's how to set Salesforce field-level security to enable the Analytics Integration User to see all fields used in the app.

1. In Setup, go to **Object Manager**.

2. In the Quick Find search box, enter the name of the object whose field-level security you want to edit.

3. Select the object, then select **Fields & Relationships**.

4. Select the field you want to edit, then select **Set Field-Level Security**.

5. For the Analytics Cloud Integration User profile, select **Visible**, and click **Save**.

6. Repeat Steps 5 and 6 for all the fields you want to use.

7. Refresh your browser cache.

You can now create the Analytics for Emergency Program Management app.

SEE ALSO:

    Salesforce Help: Field-Level Security

    Salesforce Help: Field-Level Security

Create an App from the Analytics for Emergency Response Template

Create an app from the Analytics for Emergency Program Management template.

> 📝 **Note:** Make sure that the HealthCloudERM permission set is assigned to the Analytics Integration User before creating the app.

1. Navigate to **Analytics Studio**.

2. Click **Create**, then select **App**.

3. Click **Create App from Template**.

4. Select **Analytics for Emergency Program Management**, then click **Continue**.

5. Take a quick look at the preview page, then click **Continue** to open the configuration wizard.

6. If you want to create an app or use settings from an existing app, make a selection and click **Continue**.

7. CRM Analytics performs a compatibility check of your org's data. If it uncovers any issues, you see error messages with instructions about how to address them. Fix the issues and try app creation again. If it completes successfully, click **Looks good, next**.

8. If you have Emergency Program Management for Public Health, then the next page of the wizard asks you to make one selection.

9. The first wizard question asks if you'd like to add dashboards for public health overview. If you choose **Yes**, analytics for public health and emergency requests are created in the app. If you choose **No**, analytics for emergency requests and visits only are available.

10. Click **Looks good, next**.

11. Name your app, then click **Create**.

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

12. View the status of the app creation on the next screen. The process takes a minute or two. After it's complete, refresh the page to see your app

📝 **Note:** If you see an error saying the Analytics Integration User can't access selected fields, edit field-level security.

Share the Analytics for Emergency Response Template App

After you create the app, share it with users in your organization. You can share it only with users assigned the admin or user permission sets for Analytics for Emergency Program Management.

1. Open your app if it's not already open. If you navigated away from CRM Analytics Studio, go back to it, select **All Items**, find your app, and click it.

2. Click 📤 .

3. In the next screen, use the search field under **Invite others:** to find other users in your org.

4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

5. Click **Add**, then click **Save**.

📝 **Note:** If you see an error saying the Analytics Integration User can't access selected fields, edit field-level security.

SEE ALSO:

Salesforce Help: Field-Level Security

Salesforce Help: Field-Level Security

Schedule the Dataflow for the App

The app creation process includes a dataflow that imports the latest data to CRM Analytics. Schedule the app refresh to run every day to ensure that your app uses up-to-date data.

To schedule your app, see Schedule Data Refresh for a CRM Analytics App. Select a time outside normal work hours so the data refresh doesn't interrupt business activities.

Understand Analytics for Emergency Program Management Limitations

The Analytics for Emergency Program Management app gives you access to most CRM Analytics capabilities and features, but with limitations.

| Capability	Supports
Data sources	Salesforce and external data
Object support	Standard and custom objects
Data volume	10 billion rows for Analytics Plus.
Customize existing dashboards?	Yes
Create new dashboards?	Yes

Capability	Supports
Customize existing datasets?	Yes
Create new datasets?	Yes
Create custom Analytics apps?	Yes
Supports Einstein Discovery and Experience Cloud integration?	Yes
Supports bulk actions and APEX steps?	Yes
Supports Sales Cloud Einstein AI features?	No
Supports Salesforce Inbox?	No

ANALYTICS FOR EMERGENCY PROGRAM MANAGEMENT

Identify the hotspots in which requests for emergency services are increasing so that you can allocate resources to where they're needed most. Track emergency requests coming from your community and ensure that you're proactive and effective in providing emergency assistance.

## Emergency Requests Overview

Identify the areas that are requesting assistance and see what types of requests they are making. You can view trends by area to see which locations have the most requests or are increasing in the number of requests.
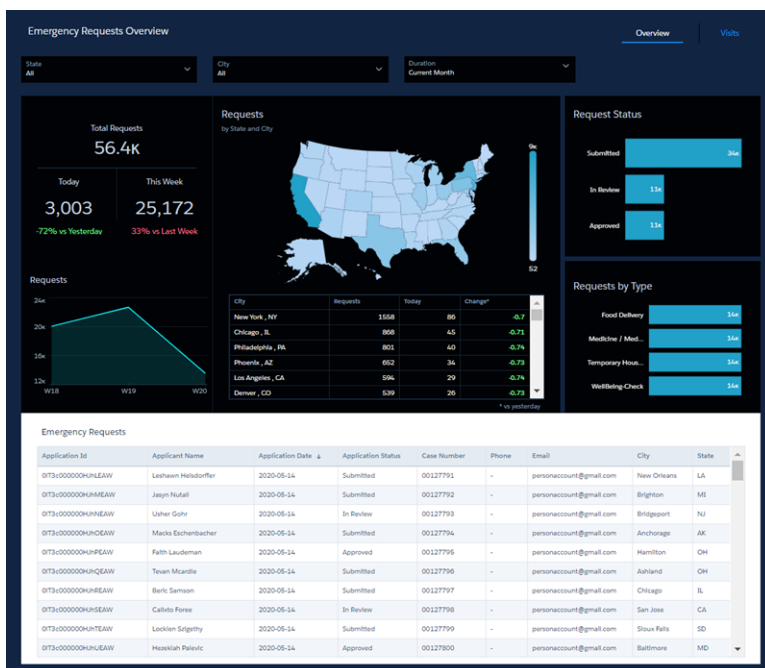
Visits Dashboard

Manage the delivery of emergency services by gaining insights into the total number of visits your agency has completed over time.

Know more about key metrics shown in Analytics for Emergency Response for Public Sector dashboards.
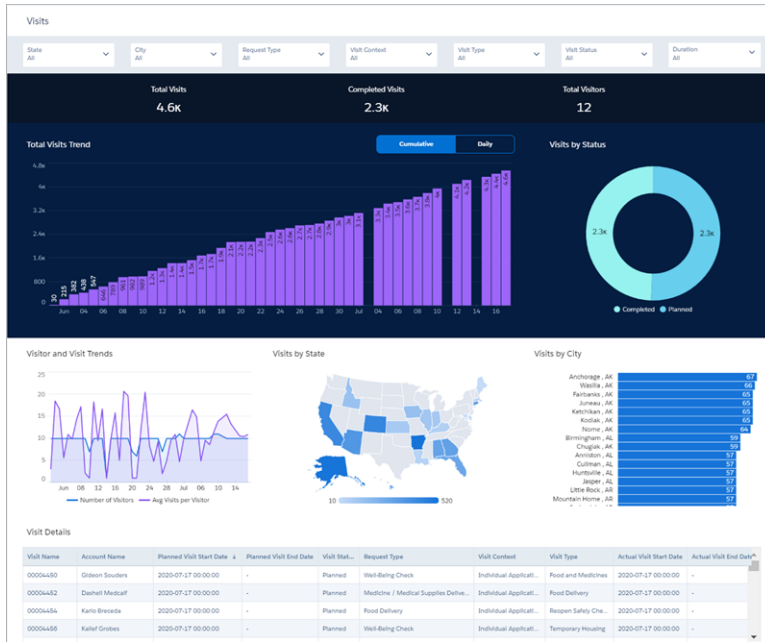
Analytics Metrics Definitions

Know more about key metrics shown in Analytics for Emergency Response for Public Sector dashboards.

> 📝 **Note:**
>
> - Current week means the start of the week until today. For example, if the start of the week is Sunday and today is Friday, current week means Sunday to Friday.
> - Last week means the start of the last week with the same number of days. For example, if the start of the week is Sunday and today is Friday, last week means last week's Sunday to last week's Friday.

Visits Dashboard

Global Filters: State, City, Request Type, Visit Context, Visit Type, Visit Status, and Duration

Metric	Description	Calculation
Total Visits	Count of visits	Count of records from the Visit entity where the Planned Start Time is within the selected duration filter.
Completed Visits	Count of completed visits	Count of records from the Visit entity where the Visit Status is Completed and the

Metric	Description	Calculation
		Planned Start Time is within the selected duration filter.
Total Visitors	Count of visitors	Count of the unique Visitor Id field from the Visit entity where the Planned Start Time is within the selected duration filter.
Total Visits Trend (Cumulative)	Rolling sum of visits	Rolling sum of records from the Visit entity where the Planned Start Time is within the selected duration filter.
Total Visits Trend (Daily)	Count of visits on a daily basis	Count of records from the Visit entity where the Planned Start Time is within the selected duration filter.
Visits by Status	Count of visits distributed over the visit status	Count of records from the Visit entity grouped by the Status where the Planned Start Time is within the selected duration filter.
Visitor and Visits Trend	Count of visits and visitors over time	**Count of Visitors:** Count of the unique Visitor Id field from the Visit entity where the Planned Start Time is within the selected duration filter **Avg Visits per Visitor:** (Count of records from the Visit entity where the Planned Start Time is within the selected duration filter) / (Count of the unique Visitor Id field from the Visit entity where the Planned Start Time is within the selected duration filter).
Visits by State	Count of visits grouped by the state	Count of records from the Visit entity grouped by the State field from the Address where the Planned Start Time is within the selected duration filter.
Visits by City	Count of visits grouped by the city	Count of records from the Visit entity grouped by the City field from the Address where the Planned Start Time is within the selected duration filter.

Emergency Requests Overview

Global Filters: State, City, and Duration

| Metric	Description	Calculation
Total Requests	Total number of emergency requests	Count of records in the Emergency Requests entity where the Applied Date field from the

Metric	Description	Calculation
		related Individual Application entity is within the selected duration filter.
Today Requests	Total number of emergency requests for the current date	Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is Today.
Change in Requests Today compared to Yesterday	Percentage change in the number of emergency requests today compared to the previous day	(Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is Today) - (Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is Yesterday) / (Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is Yesterday).
This Week Requests	Total number of emergency requests for the current week	Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is in the current week.
Change in Requests This Week compared to Last Week	Percentage change in the number of emergency requests in the current week compared to the previous week	(Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is in the current week) - (Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is in the previous week) / (Count of records in the Emergency Requests entity where the Applied Date field from the related Individual Application entity is in the previous week).
Requests by State and City	Count of emergency requests grouped by the state and city	Count of Emergency Requests, based on the State and City fields in Address from Emergency Requests entity where the Applied Date field from the related Individual Application entity is within the selected duration filter.
Request Status	Count of emergency requests grouped by the status	Distribution of records from the Emergency Requests entity, based on the Individual Application Status where the Applied Date field from the related Individual Application entity is within the selected duration.

Metric	Description	Calculation
Requests by Type	Count of emergency requests grouped by the type	Distribution of records based on the Emergency Service Request Type field from Individual Application where the applied date is within the selected duration filter.

ADD GRANTS MANAGEMENT TO THE EMERGENCY RESPONSE SITE

Grants Management helps you launch a Grantee Portal where grant seekers can find funding opportunities, apply for funding, view their application status, and submit ongoing progress reports for awarded grants all in one place.

Once you've set up Grants Management, you can create a tile in the Emergency Response site template and link to the Grantee Portal.
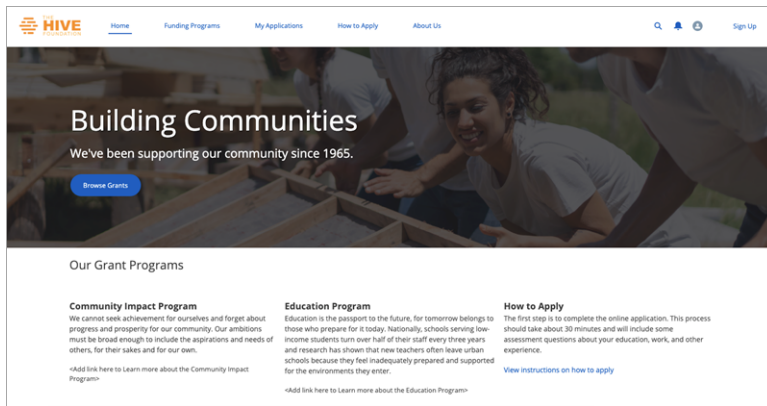
SEE ALSO:

Power of Us Hub: Grants Management

Salesforce Help: Tile Menu

Salesforce Help: Set Up the Navigation Menu

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