



Crisis Management COVID-19 Quickstart

SET-UP

- Help with app install via standard AppExchange install wizard

PERMISSIONS

- Review the included Permission Sets and Recommendations for application
- Note: Changes to the standard permission sets would be the responsibility of the client.

CONFIGURATION

- Guided Configuration Sessions. Update page layouts, required fields, picklist values
 - Safety Module (2 Hours)
 - Inspection Module (2 Hours)
- Set-up Record types for Accounts and Contacts
- Update page layouts, required fields, picklist values
- Create up to (5) new fields per object
- Coaching on set-up and configuration best practices

WORKFLOW RULES

- Enable and configure the (6) packaged workflow rules included with the package

SELF-REPORT ILLNESS/ INJURY FORM

- Review and update the Site.com Self-Report Illness/ Injury Form w/ to with field changes



DASHBOARDS

- Training on how to update the packaged Dashboards for Safety and Inspections
- Add up to (2) additional Dashboard components

TRAINING

- 60 Minutes Super User Training
- 60 Minutes System Admin Training

POST-IMPLEMENTATION SUPPORT

- Up to 4 hours of additional configuration or training support to be used within 30 days of app install

EXCLUSIONS

- No data migration
- No integration with external systems
- If access to Production is not allowed, set-up will be configured in Sandbox. Client is responsible for migration of configuration from Sandbox to Production.
- No security setting changes to OWD, Profiles, Roles, Sharing Rules or other security settings.
- Standard user and admin guides will be provided. No customized user guides
- No custom code: Apex, Visualforce, Lightning or other is included
- Client will have the resources available to ensure project completion within a week
- Self-Report Illness form will contain no conditional logic or dynamic page generation
- Creation of new checklist forms are not included

Salesforce License Requirements

- [Force.com Platform](#) • [Enterprise](#)
- [Professional + API](#) • [Unlimited](#)