



Lifeguard
S o l u t i o n s

Lifeguard Solutions COVID-19 Response Kit

Installation, Configuration & Administration Guide

Documentation Changes

This topic details the document updates that have been made for each release of this documentation.

If you have any comments or feedback on this guide, please email info@lifeguardsolutions.io. We welcome your questions and feedback.

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March 31, 2020 - Version 1.1

April 1, 2020 - Version 1.2

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Overview & Requirements

The Lifeguard Solutions COVID-19 Response Kit is a free native package intended to provide;

- Proactive Management and Awareness
- Management's Role & Response
- Continual Improvement

It includes 3 Lightning apps

1. Safety - Manage Illness/Injury, Safety Observations and Hazard Analysis
2. Inspections - Manage Audits & Compliance Calendar
3. Form Builder - Build and manage inspection forms

Required Salesforce minimum editions

- Lightning Platform
- Professional Edition + API access
- Enterprise Edition
- Unlimited Edition

This document assumes the reader has a minimum understanding of Salesforce administration principles and is designed to provide minimum requirements for use of the App and best practices recommendations.

If you require additional help outside of the scope of this document, we encourage you to consider our QuickStart package. For more information, please contact us at info@lifeguardsolutions.io.

Install COVID-19 Response Kit

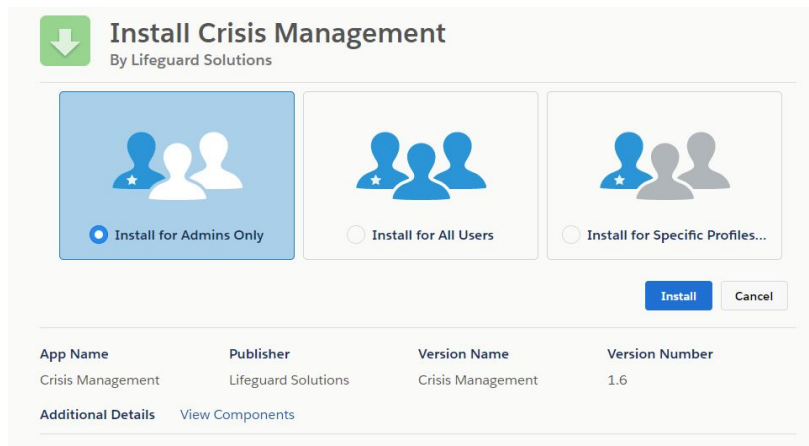
This section covers how to install the COVID-19 Response Kit managed package (the App) and complete the initial account configuration.

Use this procedure to install and deploy COVID-19 Response Kit. If you have questions about downloading AppExchange applications, refer to the [Salesforce Help](#) page for more information.

To install COVID-19 Response Kit:

1. Get the COVID-19 Response Kit App. Find the App in the AppExchange and click Get It Now. This takes you to the Confirm Installation page. Note: You might be asked to log into your Salesforce account
2. Review the instructions, type your Salesforce credentials for the location where you are installing COVID-19 Response Kit, read and agree to the terms & conditions and then click Install. You are taken to the Package Installer page. **Note: we recommend installing into a sandbox first for review and testing**
3. Review Package Installation Details. From the Package Installer page, click the View Components to see the components installed with COVID-19 Response Kit. Click Install to continue with the installation.
4. Choose the security level. The security level determines user access to COVID-19 Response Kit. **Grant access to admins only** (you will grant access to users through permission sets in a

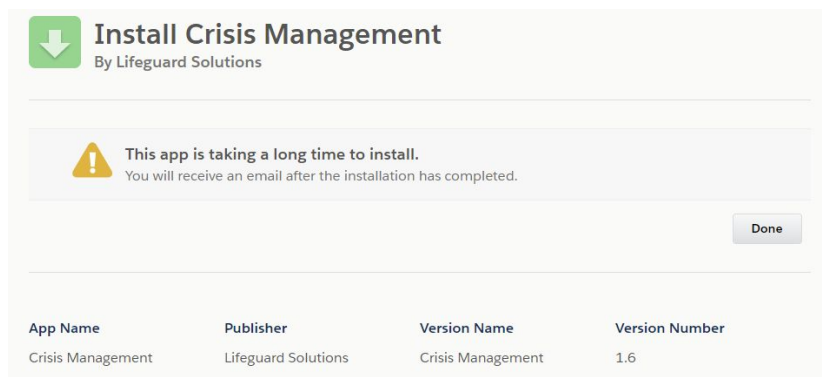
later step)



App Name	Publisher	Version Name	Version Number
Crisis Management	Lifeguard Solutions	Crisis Management	1.6

[Additional Details](#) [View Components](#)

5. You are now ready to install COVID-19 Response Kit to your Salesforce org. Click Install to continue. The installation process begins and can take up to 15 minutes. You will be notified by email when it is completed.



App Name	Publisher	Version Name	Version Number
Crisis Management	Lifeguard Solutions	Crisis Management	1.6

6. After installation, on the list of Salesforce Installed Packages, you can see the COVID-19 Response Kit package. When the installation is completed, you are ready to configure the App.

Configure COVID-19 Response Kit

Use this procedure to configure COVID-19 Response Kit. Configuration includes adding permission sets to users, setting up record types, assigning layouts.

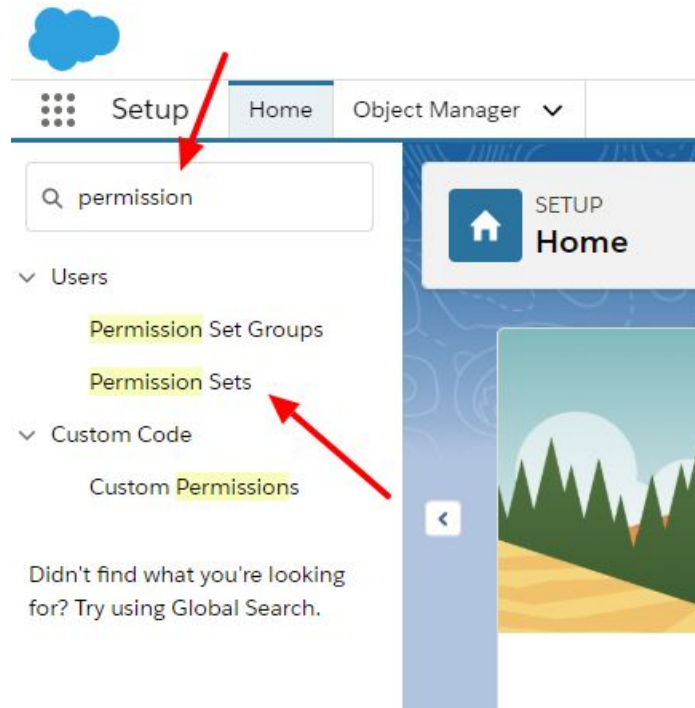
To configure COVID-19 Response Kit:

1. Assign Permission Sets to Users in bulk - required

[\(to assign to a single user refer to the Salesforce Help\)](#)

- a. There are 3 standard permission sets that are included in the package. [Here are the detailed permissions for each.](#)
 - i. Standard User - Create & Edit for Safety
 - ii. Manager User - Create & Edit, View All for Safety & Inspections App
 - iii. Super User - Create & Edit, Modify All for Safety, Inspections, Form Builder App

- b. From Setup, enter “Permission” in the Quick Find box, then select permission sets.

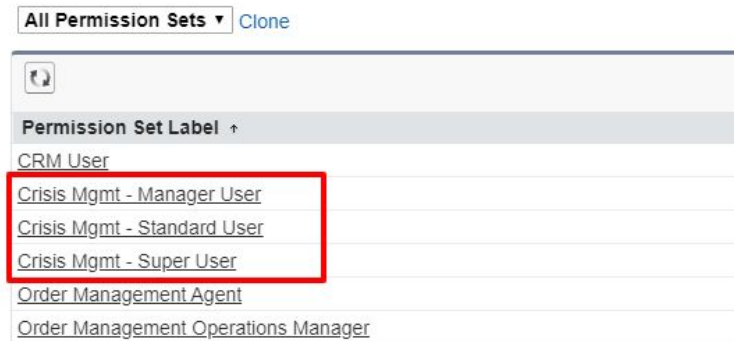


- c. Select the desired permission set you wish to assign:

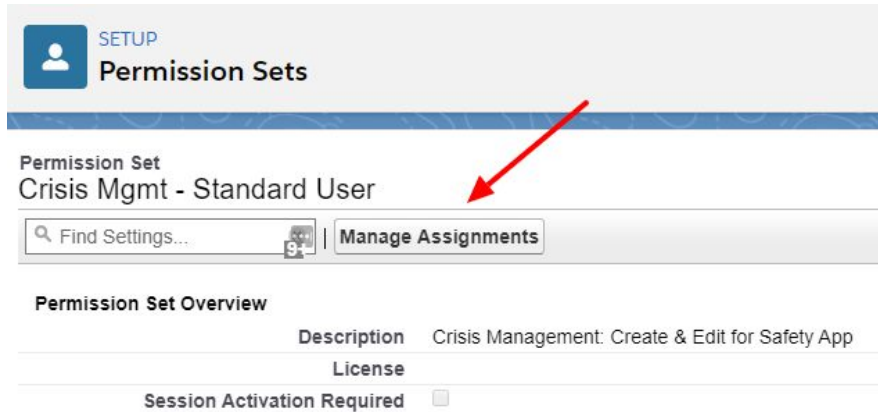
Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user.



- d. Select Manage Assignments and select the users you wish to assign.



- e. You will not be able to modify these permission sets because they are part of the managed package. Simply clone them and make the necessary changes if required. In order to meet your company's data sharing requirements you may need to adjust other permissions. Please refer to [Control Who Sees What in Salesforce Help](#).
- f. As System Permissions cannot be packaged within the permission sets of a managed package, the user's access to Report and Dashboard functionality will depend either on any existing profile or permission set capabilities assigned, or a new in-org permission set created and granted allowing these capabilities.

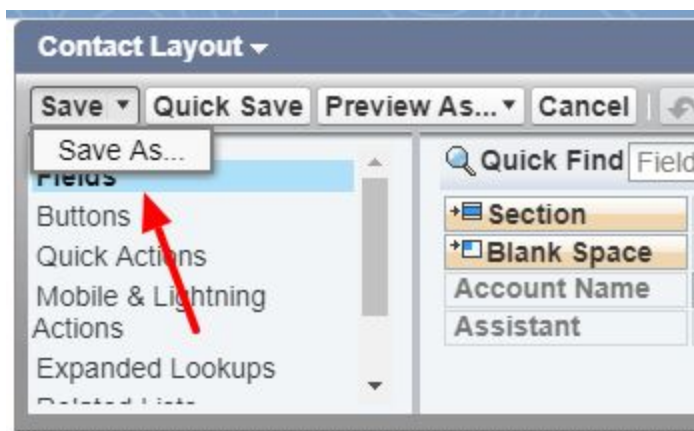
2. Setup contact record types and page layouts - recommended

Note: if all employees are currently licensed in your Org, then reporting can be done using user records, not contact records. If you have a mix of both, we still recommend using contacts for them.

Since you are tracking details about employees and other stakeholders within your company (like suppliers or contractors),

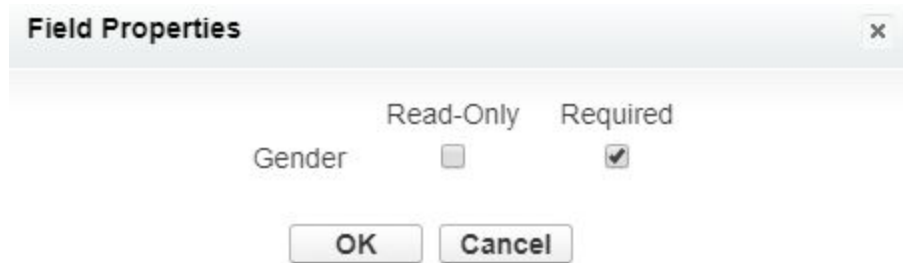
we recommend that you set up record types for them for better reporting and page layouts. If your Salesforce org contains these types of accounts and/or contacts already you may want to ignore this step and report using whatever filtering criteria you currently have configured. We suggest creating layouts to assign to those record types. Setting required fields on those layouts will also ensure better data quality.

- a. Review the [Salesforce Help article](#) on record type creation if required.
- b. Under the Contact object, create a new record type called Employee. Do similar for other types as required.
- c. Review the [Salesforce Help article](#) or [Trailhead](#) on page layout creation if required.
- d. Under the Contact object, open a standard layout and Save As a new one.



- e. In the new layout, add the necessary fields. We recommend Gender, Birthdate and Occupation as a minimum for tracking employee injuries or illnesses.

- f. Set any required fields on the layout.



The image shows a 'Field Properties' dialog box with a close button (X) in the top right corner. Inside the dialog, there are two columns of checkboxes: 'Read-Only' and 'Required'. Under the 'Read-Only' column, the 'Gender' field has an unchecked checkbox. Under the 'Required' column, the 'Gender' field has a checked checkbox. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

3. **Setup account record types and page layouts - recommended**

We suggest creating record types for accounts if you need to manage them by an Internal Organization or Contractor. If your Salesforce org contains these types of accounts already you may want to ignore this step and report using whatever filtering criteria you currently have configured.

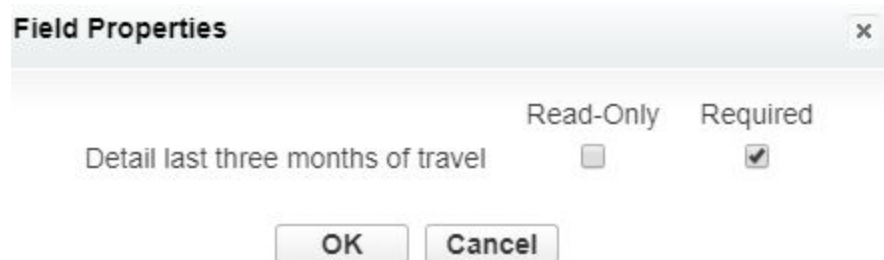
- a. Review the [Salesforce Help article](#) on record type creation if required.
- b. Under the Account object, create a new record type called Internal Organization. Do similar for other types as required (Contractor, Vendor etc).
- c. Review the [Salesforce Help article](#) or [Trailhead](#) on page layout creation if required.
- d. Under the Account object, open a standard layout and Save As a new one.
- e. In the new layout, add the necessary fields.

- f. Set any required fields on the layout.

4. Set required fields on other COVID-19 Response Kit object page layouts - recommended

Setting required fields on those layouts will also ensure better data quality. We recommend setting required fields on the Illness/Injury object as a minimum.

- a. In the object layout set required fields.



The screenshot shows a 'Field Properties' dialog box with a close button (X) in the top right corner. Below the title bar, there are two columns of checkboxes: 'Read-Only' and 'Required'. Under the 'Read-Only' column, there is an unchecked checkbox. Under the 'Required' column, there is a checked checkbox. The text 'Detail last three months of travel' is positioned between the two columns of checkboxes. At the bottom of the dialog box, there are two buttons: 'OK' and 'Cancel'.

5. Activate email notification workflow - recommended

Email notifications are critical to ensure that users are made aware of new record creation or assignment. Note that these are available for Enterprise Edition Licenses only.

Name	Object	Description
CMA Illness/Injury New COVID-19 Record Creation	Illness & Injury	A new COVID-19 Illness/Injury email notification - triggered when a new Illness/Injury record is created

CMA Illness/Injury New Record Creation - SITES	Illness & Injury	A new Sites-generated Illness/Injury email notification - triggered when a new Self Report form is submitted Refer to Create the Salesforce Sites Self-Report URL
CMA SWA - New Record Creation	Stop Work Authority	A new SWA Record email notification - triggered when a new Stop Work Authority is created
CMA CAPA - Change of Owner Notification	CAPA	CAPA email notification to changed Owner - triggered when the owner is originally assigned changed

- a. From Setup, enter “Workflow” in the Quick Find box, then select Workflow Rules.
- b. Select the relevant rule and activate it.

Workflow Rule
CMA Illness/Injury New COVID-19 Record Creation

Workflow Rule Detail

[Edit](#) [Delete](#) [Clone](#) [Activate](#)

Rule Name	CMA Illness/Injury New COVID-19 Record Creation
Namespace Prefix	LGS_Crisis
Active	☐
Description	A new COVID-19 Illness/Injury record notification
Rule Criteria	AND(NOT(ISPICKVAL(CreatedBy.Profile.UserType,"Guest")), LGS_Crisis__Lifeguard_COVID_19__c = True)
Created By	Jeff Campbell , 3/24/2020, 1:38 AM

c. Edit the email alert recipients

Workflow Rule
CMA Illness/Injury New COVID-19 Record Creation

Workflow Rule Detail

Rule Name: CMA Illness/Injury New COVID-19 Record Creation

Namespace Prefix: LGS_Crisis

Active: ☐

Description: A new COVID-19 Illness/Injury record notification

Rule Criteria: AND(NOT(ISPICKVAL(CreatedBy.Profile.UserType,"Guest")), LGS_Crisis_Lifeguard_COVID_19_c = True)

Created By: Jeff Campbell 3/24/2020, 1:38 AM

Workflow Actions

Immediate Workflow Actions

Type	Description
Email Alert	CMA Illness/Injury New COVID-19 Record Notification

Edit Email Alert
CMA Illness/Injury New COVID-19 Record Notification

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert.

Email Alert Edit

Description: CMA Illness/Injury New COVID-19 Record Notification

Unique Name: CMA_Illness_Injury_New_C

Namespace Prefix: LGS_Crisis

Object: Illness & Injury

Email Template: CMA Illness / Injury: New C

Protected Component: ☐

Recipient Type: Search: User for: Find

Recipients

Available Recipients

Selected Recipients

Illness & Injury Owner

d. Edit the email template if required.

HTML Email Template
CMA Illness / Injury: New COVID-19 Record Created

Preview your email template below.

Email Template Detail

Folder: Crisis Mgmt Email Templates

Email Template Name: CMA Illness / Injury: New COVID-19 Record Created

Template Unique Name: CMA_Illness_Injury_New_COVID_19_Record_Created

Namespace Prefix: LGS_Crisis

Classic Letterhead: CMA Crisis Mgmt Letterhead

Email Layout: Free Form Letter

Encoding: General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Author: Jeff Campbell [Change]

Description: New COVID-19 Illness/Injury record created

Created By: Jeff Campbell 3/24/2020, 1:33 AM

Modified By: Jeff C

- e. Workflow rule CMA Illness/Injury New Record Creation - SITES defaults to email alert the Illness & Injury Owner. We suggest setting up a queue for these. Any Illness & Injury record created externally would be assigned to this Queue would alert members of the queue. From Setup, enter

“Queues” in the Quick Find box, then select Queues. Select New, then complete the Label & Queue Name. Select the Illness & Injury Object.

New Queue

Queue Edit [Save] [Cancel]

Queue Name and Email Address

Enter the name of the queue and the email address to use when sending notifications (for example, when a case has been put into this queue members will be notified).

Label: [Red arrow points here]

Queue Name: [Red arrow points here]

Queue Email:

Send Email to Members: ☐

Supported Objects

Select the objects you want to assign to this queue. Individual records for those objects can then be owned by this queue.

Available Objects

- Form Builder
- Form Builder Detail Pages
- Form Related Questions
- Hazard Analysis
- Investigation
- Location (Installed Package: Crisis Management)
- People Involved
- Project
- Questions
- Return to Work
- Risks/ Controls
- Safety Observation
- Safety Team
- Lifeguard Settings

Selected Objects

- Illness & Injury [Red arrow points here]

Add [Right Arrow] Remove [Left Arrow]

f. Then Assign members to this queue. and Save

Queue Members

To add members to this queue, select a type of member, then choose the group, role, or user from the list. If you are not sure, you can search for a user. All users already have access to the records for those objects.

Search: for: [Find]

Available Members

--None--

Add [Right Arrow] Remove [Left Arrow]

Selected Members

[Empty list]

[Save] [Cancel] [Red arrow points here]

- g. Create a field update workflow action to assign the owner to the Illness Self Report Queue.

Edit Field Update
Assign to Queue

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to assign.

The screenshot shows the 'Field Update Edit' window for 'Assign to Queue'. The 'Identification' section contains the following fields: 'Name' (Assign to Queue), 'Unique Name' (Assign_to_Queue), 'Description' (empty), 'Object' (Illness & Injury), 'Field to Update' (Owner), 'Field Data Type' (Lookup), and 'Re-evaluate Workflow Rules after Field Change' (checked). A red arrow points to the 'Field to Update' dropdown. The 'Specify New Field Value' section contains the 'Owner' dropdown set to 'Queue' and a lookup icon, with 'Illness Self Report Queue' displayed next to it. The 'Notify Assignee' checkbox is unchecked. The window has 'Save', 'Save & New', and 'Cancel' buttons at the top and bottom.

6. Setup Salesforce Data Classification - recommended

Ultimately, it is your company's responsibility to ensure compliance with any relevant data compliance standard. Salesforce provides the tools to achieve this. Please refer to [Salesforce Help](#).

- a. Set a data sensitivity level and the relevant compliance categories.

Custom Field Definition Edit [Save] [Cancel]

Field Information

Field Label: COVID-19 confirmed

Field Name: Lifeguard_COVID_19

Namespace Prefix: LGS_Crisis

Description: COVID-19 illness confirmed

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: Confidential

Compliance Categorization

Available

- PII
- PCI
- COPPA
- CCPA

Chosen

- HIPAA
- GDPR

- b. This can be done for any standard, packaged or custom field.

7. Create the Salesforce Sites Self-Report URL - recommended

Provide stakeholders without a Salesforce license the ability to Self Report an Illness or Injury. We recommend that the URL generated is only provided to internal stakeholders to ensure data quality. This form can be completed by anyone with access to this Sites URL. [Refer to Sites documentation.](#)

- a. If not already done, [register My Domain](#). Although not technically required for Sites it's best practice to have it setup.
- b. Within Setup, use Quick Find to locate Sites.

- c. Register a Site Domain name. [Refer to Salesforce Help article](#) if required.

Sites

What is a Site?

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is guaranteed. Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, a site for existing developers, and a site for partners.

Sample Domain Name

MyCompany.force.com

Sample sites URLs

- MyCompany.force.com/customers
- MyCompany.force.com/developers
- MyCompany.force.com/partners

To get started, first register your company's Salesforce site domain. Your Salesforce site domain must be unique and must consist of only alphanumeric characters. Salesforce.com recognizes domain names such as 'mycompanyportal.'

You cannot modify your Salesforce site domain name after the registration process.

http:// -developer-edition.na1111.force.com

☐ I have read and accepted the Salesforce [Sites Terms of Use](#)

- d. Click “New” in the Sites section of the page to create a new Site.

- e. Enter the following;

- Site Label - we recommend Self Report
- Site Name - we recommend Self_Report
- Site Description -optional
- Site Contact - administrator user
- URL suffix in the Default Web Address - optional
- Mark the site as active

- vii. Your values should look like the image below. Save the site record.

The screenshot shows a 'Site Configuration' form for a site labeled 'Self Report'. The form includes fields for Site Name, Site Description, Site Contact, Default Web Address, Active checkbox, Active Site Home Page, Inactive Site Home Page, Site Template, Site Robots.txt, Site Favorite Icon, Analytics Tracking Code, URL Rewriter Class, Enable Feeds, Clickjack Protection Level (set to 'Allow framing by the same origin only (Recommended)'), Require Secure Connections (HTTPS) (checked), Lightning Features for Guest Users (checked), Upgrade all requests to HTTPS (checked), Enable Content Sniffing Protection, Enable Browser Cross Site Scripting Protection, Referrer URL Protection, and Guest Access to the Support API.

- f. Select the site label and then select Public Access Settings. You will be editing the Self Report Profile.

The screenshot shows the 'Site Details' page for the 'Self Report' site. The page has a navigation bar with tabs: Edit, Public Access Settings, Login Settings, URL Redirects, and Deactivate. A red arrow points to the 'Public Access Settings' tab. The main content area shows site details like Site Label, Site Description, Active checkbox, Active Site Home Page, Inactive Site Home Page, Site Template, Analytics Tracking Code, Clickjack Protection Level, Lightning Features for Guest Users, Enable Content Sniffing Protection, Referrer URL Protection, Site Name, Site Contact, Login, Site Favorite Icon, Site Robots.txt, Enable Feeds, URL Rewriter Class, Require Secure Connections (HTTPS), Upgrade all requests to HTTPS, Enable Browser Cross Site Scripting Protection, and Guest Access to the Support API. The page also shows 'Last Modified By' and 'Created By' information.

- g. Edit the profile and give object permissions to the Illness/Injury & Location objects. Save the profile.

Illness & Injury	Read Create Edit
Locations	Read Create Edit Delete View All

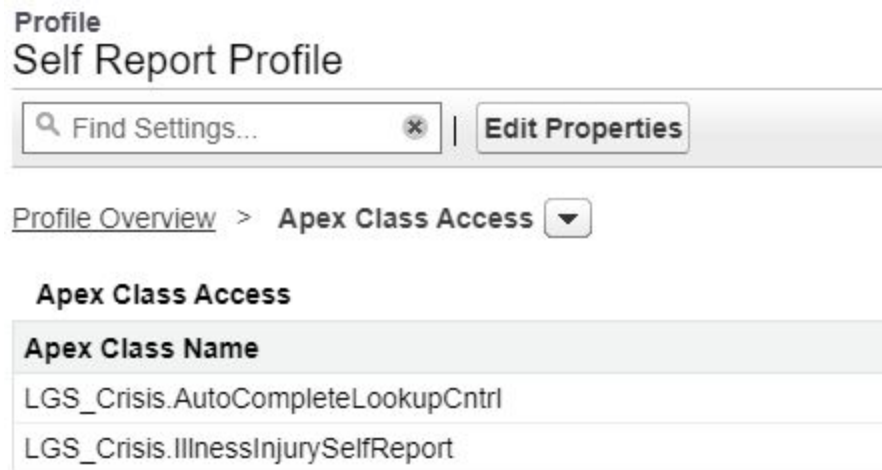
Note: If you have the enhanced profile user interface enabled then you will be able to set the object and field level permissions in one step. View shown below is the standard layout.

Custom Object Permissions													
	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Action Plans	☐	☐	☐	☐	☐	☐	Investigations	☐	☐	☐	☐	☐	☐
Action Plan Contacts	☐	☐	☐	☐	☐	☐	Lifeguard Settings	☐	☐	☐	☐	☐	☐
Audits	☐	☐	☐	☐	☐	☐	Locations	☒	☒	☒	☒	☒	☒
Audit Form Questions	☐	☐	☐	☐	☐	☐	Notice	☐	☐	☐	☐	☐	☐
Audit Scheduler	☐	☐	☐	☐	☐	☐	People Involved	☐	☐	☐	☐	☐	☐
Audit Scheduler Resource	☐	☐	☐	☐	☐	☐	Projects	☐	☐	☐	☐	☐	☐
CAPA	☐	☐	☐	☐	☐	☐	Questions	☐	☐	☐	☐	☐	☐
Checklist	☐	☐	☐	☐	☐	☐	Return to Work	☐	☐	☐	☐	☐	☐
Claims	☐	☐	☐	☐	☐	☐	Risks/ Controls	☐	☐	☐	☐	☐	☐
Email Transactions	☐	☐	☐	☐	☐	☐	Root Cause Identification	☐	☐	☐	☐	☐	☐
Equipment	☐	☐	☐	☐	☐	☐	Safety Observations	☐	☐	☐	☐	☐	☐
Equipment Inspections	☐	☐	☐	☐	☐	☐	Safety Teams	☐	☐	☐	☐	☐	☐
Forms	☐	☐	☐	☐	☐	☐	Signatures	☐	☐	☐	☐	☐	☐
Form Builder Detail Pages	☐	☐	☐	☐	☐	☐	Stop Work Authority	☐	☐	☐	☐	☐	☐
Form Related Questions	☐	☐	☐	☐	☐	☐	Team Members	☐	☐	☐	☐	☐	☐
Hazard Analysis	☐	☐	☐	☐	☐	☐	Worksites	☐	☐	☐	☐	☐	☐
Illness & Injury	☒	☒	☒	☐	☐	☐	Work Site Inspections	☐	☐	☐	☐	☐	☐

- h. Go to the Field Level Security section, view and give read and edit permissions to all the fields for the Illness/Injury & Location objects. View shown below is the standard layout.

Field Level Security for profile				Help for this Profile	
Self Report Profile					
				Save	Cancel
Field Name	Field Type	Read Access	Edit Access		
Accident type	Picklist (Multi-Select)	☒	☒		
Activity at time of incident	Long Text Area	☒	☒		
Activity just before the incident?	Long Text Area	☒	☒		
Age	Number	☒	☐		
Birthdate	Date	☒	☒		
Body part impacted	Picklist (Multi-Select)	☒	☒		
Check if event time cannot be determined	Checkbox	☒	☒		
City	Text	☒	☒		
Classification	Picklist	☒	☒		
Classify the case	Picklist	☒	☒		
Comments	Rich Text Area	☒	☒		
Completed By	Text	☒	☒		
Completed By Phone	Phone	☒	☒		
Completed By Title	Text	☒	☒		

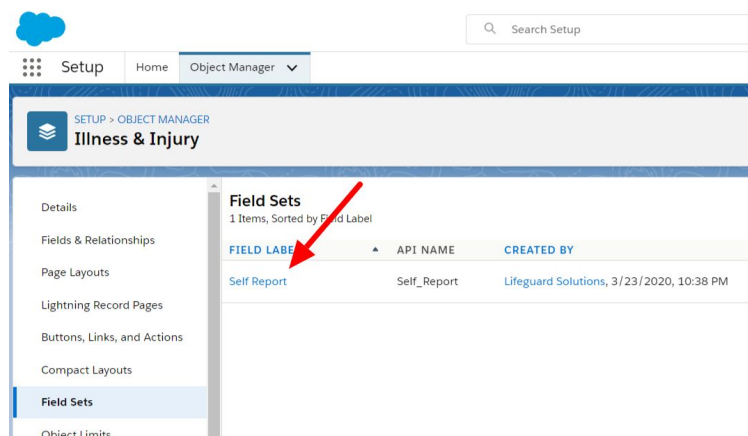
- i. Go to the Enabled Apex Class Access Section and give Permissions for the following Apex Classes:
 - i. LGS_Crisis.AutoCompleteLookupCntrl
 - ii. LGS_Crisis.IllnessInjurySelfReport



- j. Go to the Enabled Visualforce Page Access section and give permissions for the following VisualForce Pages:
 - i. LGS_Crisis.AutoCompletelookup
 - ii. LGS_Crisis.IllnessInjurySelfReport

Enabled Visualforce Page Access	
Visualforce Page Name	
BandwidthExceeded	
Exception	
FileNotFound	
ForgotPassword	
ForgotPasswordConfirm	
InMaintenance	
LGS_Crisis.AutoCompleteLookup	
LGS_Crisis.Care_Of_People_PDF	
LGS_Crisis.HAGraphics_VF	
LGS_Crisis.IllnessInjurySelfReport	
SiteLogin	

- k. Note your site URL. Append
/LGS_Crisis__IllnessInjurySelfReport to your site URL for the full link. eg.
https://lgs-crisis-developer-edition.na111.force.com/LGS_Crisis__IllnessInjurySelfReport
- l. Provide the URL securely to those that need to self report
- m. If you wish to edit the fields on the layout you can do so via the field set. Navigate to the Illness & Injury object, then field sets.



- n. Drag and drop fields and set those that you would like required.

In the Field Set 

Location

Incident Date and Time

Describe injury or illness

Nature of injury/illness

Classification

Detail last three months of travel

Work Related

★ Self Reported Name

★ Email

Phone

Street

City

State/ Province

Zip/ Postal Code

Tested for COVID-19?

COVID-19

Quarantine Required?

Treated in an emergency room?

Hospitalized overnight as an in-patient?

Facility Name

Facility Street

Facility State/ Province

Facility Zip/ Postal Code

- o. Your changes will be reflected in the external self report form.

Illness or Injury Self Report

Submit

 Lifeguard Solutions

Self Report an Illness or Injury

Injured Person Information

Location

Enter Text to Search

Incident Date and Time

Describe injury or illness

Nature of injury/illness

--None--

Classification

--None--

Detail last three months of travel

Work Related

☒

Self Reported?

☐

Self Reported Name

Email

Phone

Street

City

State/ Province

--None--

Zip/ Postal Code

Tested for COVID-19?

☐

COVID-19

☐

Quarantine Required?

☐

Treated in an emergency room?

☐

Hospitalized overnight as an in-patient?

☐

Facility Name

Facility Street

Facility State/ Province

--None--

Facility Zip/ Postal Code

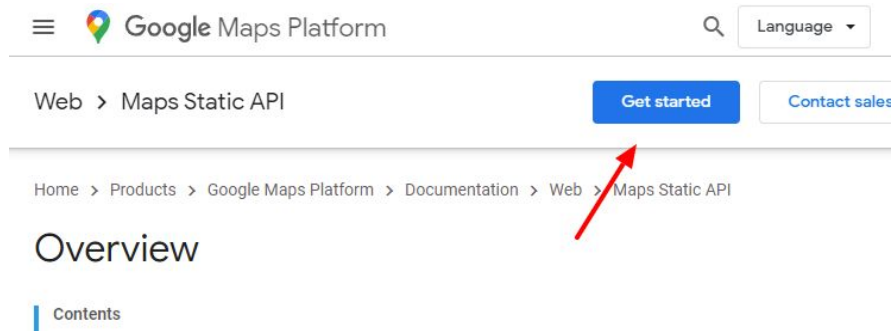
Submit

8. Setup the Google Maps API - recommended

With the Google Apps API setup and integrated, you can see the maps for reported injury/illness and location records. It uses the geolocation fields (GPS Coordinates) in each object and the Google Maps API to display them.

a. [Reference the Google Maps Platform - Maps Static API](#)

b. Select Get Started



-

To enable APIs or set up billing, we'll guide you through a few tasks:

- ☒
- Maps

☐ Routes☐ Places

CANCEL

NEXT

-

You're all set to start developing!



ⓘ To improve your app's security, restrict this key's usage in the [API Console](#)

DONE

- COVID-19 Response Kit - Installation, Configuration & Administration Guide

Lifeguard_Map_Authorization custom setting.

Q Custom Settings

Custom Code

Custom Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Custom Settings

Custom Settings

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom : be used by formula fields, Visualforce, Apex, and the Web Services API.

View: All Create New View

Action	Label +	Visibility	Settings Type
Edit Del Manage	Formbuilder Button Color	Public	List
Edit Del Manage	FormbuilderFieldCreate	Public	List
Edit Del Manage	FormbuilderObject	Public	List
Edit Del Manage	Lifeguard_Map_Authorization	Public	List
Edit Del Manage	SiteSettings	Public	List

- f. Create a new record and enter Map_Record for the Name. Paste in your API key and Save.

Lifeguard_Map Authorization Edit

Provide values for the fields you created. This data is cached with the application.

Edit Lifeguard_Map Authorization

Save Save & New Cancel

Lifeguard_Map Authorization Information

Name Map_Record

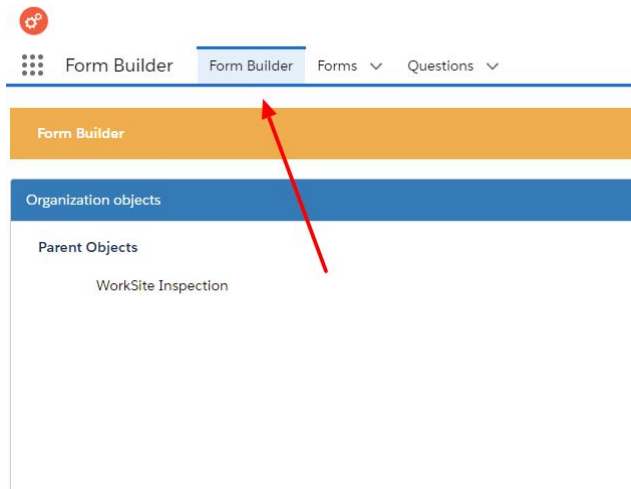
API Key

9. Create simple checklists with the Form Builder - recommended

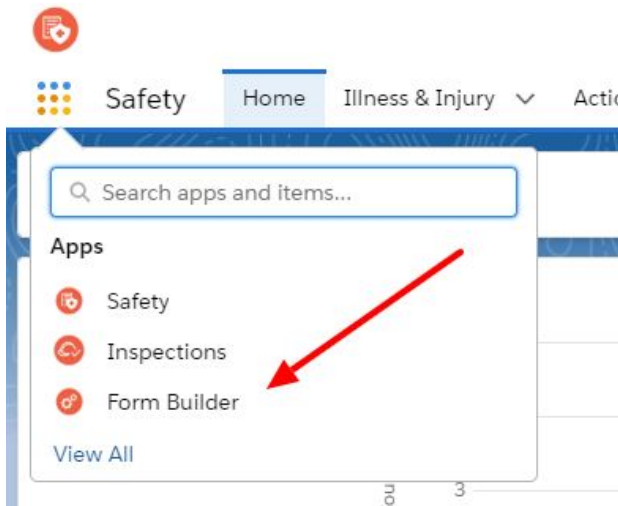
[Refer to the Form Builder guide here.](#)

- a. Ensure that the Crisis Mgmt Super User has been assigned to any users wanting to create forms (besides a system administrator)

- b. **Select the Form Builder app from the Quick Launch and click on the Form Builder tab immediately.** This is critical to trigger the setup of all the custom settings.



- c. By default, forms can be built and related to the Worksite and Equipment Inspection objects.
- d. Navigate to Form Builder app and then the Form Builder tab within.



- e. Refer to section III. Creating Forms with Builder in the [Form Builder guide](#).