



AppyBack App

Setup & User Guide

Last updated: 1/5/2020 - Check Last Version: https://sfdc.co/appyback_manual

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Introducing the AppyBack App

Use the AppyBack App to manage the post COVID emergency and the smooth return to the office premises, readily aligning to the current policies:

- **Easily support your back to the office processes:** Manage employees and premises adhering to health and safety policies
- **Streamline booking & approval for employees:** Easy to use app to book access to the workplace with approval processes
- **Access control through smooth check-ins:** Facilitate employee check-ins applying relevant health checks and PPE delivery
- **Real-Time Monitoring of Working Premises:** Out-of-the-box updated dashboards with real time occupancy of office premises and warnings
- **Deliver Trust and Innovation:** Fast & secure deployment to simplify employee experience

Installation and Setup

Legal Disclaimer

The Employer is the data controller and the only responsible to guarantee and enforce compliance with privacy law.

Installation Prerequisites

Required Licenses:

- Employees, Front Desk Manager, Office Manager: Lightning Platform Starter (EE) - Includes Company Community for Lightning Platform permission set license (if no more than 10 custom objects are needed):
<https://www.salesforce.com/eu/editions-pricing/platform/>
- System Administrators: Lightning Platform Administrator
- (optional) Sanification Operator: Lightning Platform Starter (EE) in case you want to assign a user license also for the operator doing the sanification, in our scenario is the office manager in charge of recording those events.

Package Installation

To install AppyBack use the link below and login in the org where you want to install the unmanaged package:

- Sandbox URL: https://sfdc.co/appyback_test
- Production URL: https://sfdc.co/appyback_install

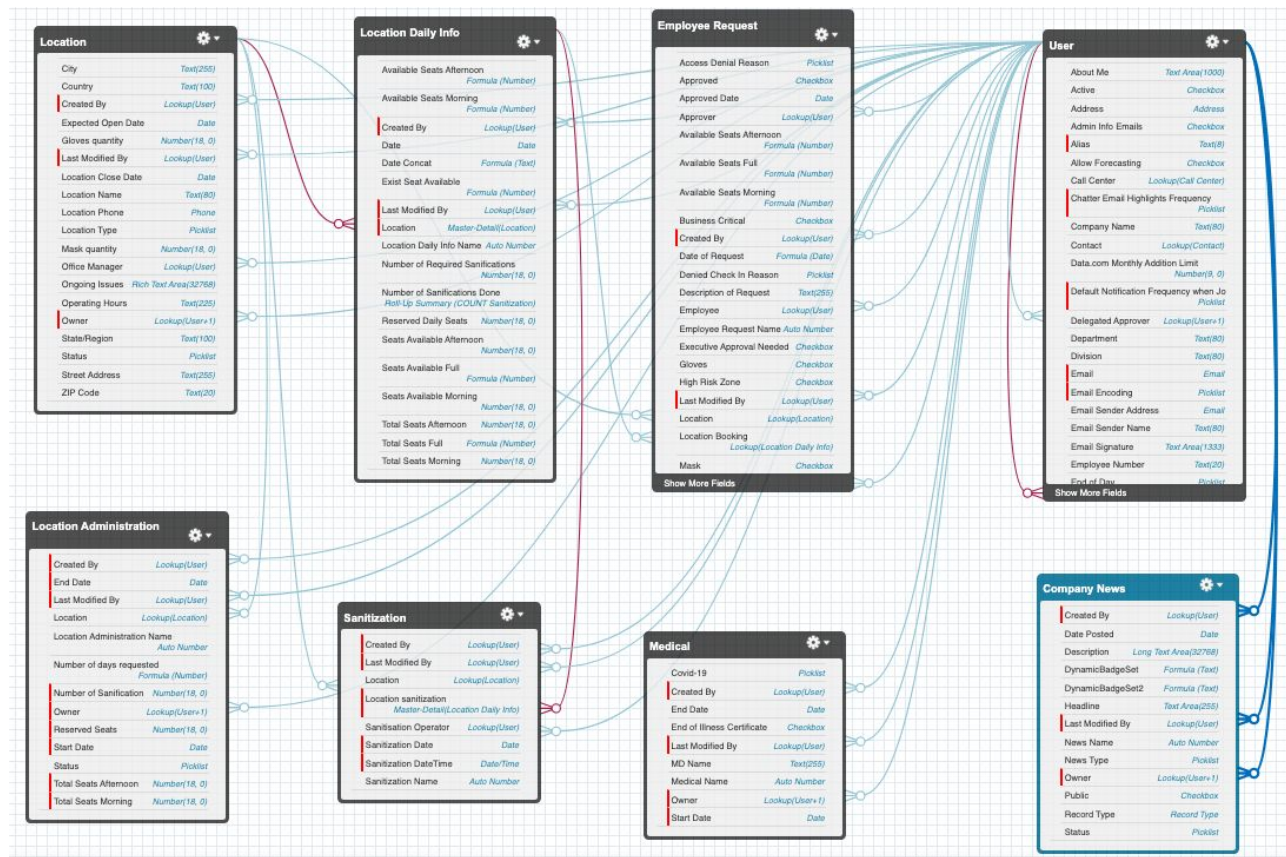
My Domain

Please remember to enable MyDomain to use the Lightning Runtime and the LWC into the package.

Object Data Model

This app adds the following custom objects:

- **Location:** contains all the needed attributes related to an office location
- **Location Daily Info:** this is used to list the available seats for each configured date within the location. In the app we assume the daily bookable slots can be: Full Day, Morning Only, Afternoon Only.
- **Location Administration:** this is an admin object used to routinely configure the location availabilities for a specific location and a set of dates
- **Employee Request:** this object contains the booking request for a seat in a specific location and date. These can be subject to approvals from a manager defined by the user Manager field.
- **Company News:** this is used to store company news showed in the home page of the employees
- **Medicals:** this object contains data of medical information about the employees
- **Sanitization:** this object is used to record sanitization events related to a specific date on a specific location
- **User:** the standard user object is used to identify the employee. AppyBack adds some attributes to track specific processes:
 - **Need Access Approval:** this flag is used to inform the approval process that the employee request cannot bypass the approval a his manager



Profiles, Roles & Permission Sets

Within the application you'll be able to use permission sets to enable the relevant users to use the app:

- **AB Office Manager**: Assign this to enable the related users to manage office location and location daily allowances, to access a tailored home page and dashboards.
- **AB Front Desk**: Assign this to enable the related users to check-in the employees verifying the employee requests and implementing specific tasks in order to allow him into the office. Also this user will have a tailored home page focusing on the daily requests.
- **AB Employee**: assign this to enable employees' users to create booking requests for a slot in a specific location and date.
- **AB Manager**: assign this to enable managers to have a specific homepage with items to approve.

You will need to define/modify and use profiles to associate the correct resource to the specific users:

- associate the related lightning home pages:
 - Home Page Office Manager
 - Home Page Employee
 - Home Page Front Desk

You will need to define/modify use roles to associate the correct resource to the specific users:

- Dashboards: Office Manager Dashboard, Employee Dashboard, Front Desk Agent Dashboard in “AppyBack” and “AppyBack - Employees” folders
- Reports: those used in the related dashboards in “AppyBack” and “AppyBack - Employees” folders

Please remember to define on each dashboard filters value on desired locations or dates.

Mobile Settings

To have the correct global action to book a new slot on the mobile app you need to setup the “Publisher Layouts” and to assign the “AB Employee Global Layout” to the needed profiles.

“New Access” action is the one linked to the Employee Request flow.

Sharing Rules

Employee Requests

To allow Front Desk and Office Manager Users to see and edit the employee requests you need to set a specific sharing rule, for example:

Employee Request Sharing Rules			
		New	Recalculate
Employee Request Sharing Rules Help ?			
Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Employee	Group: Manage All Requests	Read/Write

You may want to create a new public group containing both roles.

Group

Manage All Requests

Help for this Page ?

		Edit	Delete
Label	Manage All Requests		
Group Name	Manage_All_Requests		
Grant Access Using Hierarchies	☒		
Created By	Giacomo Selmi , 30/04/2020, 11:42		Modified By Gianluca Carminati , 08/05/2020, 16:21

		View All Users
Name	Type	
Office Manager	Role	
Front Desk	Role	

Company News

To allow users to see Company News on their homepage please set a sharing rule as in the example (or using public groups of your choice). The package sets the OWD of this object to private.

Company News Sharing Rules			
		New	Recalculate
Company News Sharing Rules Help ?			
Action	Criteria	Shared With	Access Level
Edit Del	Company News: Public EQUALS True	Role: Employee	Read Only
Edit Del	Company News: Public EQUALS True	Role: Front Desk	Read Only
Edit Del	Company News: Public EQUALS True	Role: Office Manager	Read Only

Medical Records

To allow Office Manager to view and edit the Medical records set the sharing rules as in the example here:

Medical Sharing Rules			
		New	Recalculate
		Medical Sharing Rules Help ?	
Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Employee	Role: Office Manager	Read/Write

Flows

Within the app there are some flows taking care of the AppyBack processes:

- **Book Slot at Location:** this flow is started by an Employee from a global action and allows him to submit a new Employee Request.
- **Update Availability Counters:** a subflow used to adjust available slot at location on a specific date
- **Cancel Request:** used when a user cancels his booking to update the available slot available
- **CheckIn at Location:** this flow is started by the Front Desk Agent after scanning the QR code of the Employee request to start the check-in process
- **CheckOut Request:** used by a user to check out from the office
- **Add Sanitization Record:** this is used by the office manager to add a sanitification event record
- **Location Setup:** this flow is started from a Location Administration object to configure the available slots for a specific period of time

Employees, Front Desk Agent and Office Manager need to have “Flow Users” flag enabled under each User settings.

Employee Request Approval Process

You may want to set-up an approval process for “Employee Requests”, the package offers email templates you can use as a starting point.

As an example you could set it this way:

Process Definition Detail			
	EditCloneDeactivate		
Process Name	Requests Approval		Active ☒
Unique Name	Requests_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria	Employee Request: Status EQUALS Under Approval		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	☐
Approval Assignment Email Template			
Initial Submitters	Employee Request Owner		

When the approval process has been defined and if you change its name from “Employee_Req_Approval” , remember to change the name on the step called “Employee_Req_Approval” of the “Book Slot at Location” .

Where the process triggers on a specific status of the object and on a custom user field:

- Status: Under Approval
- User.Needs Access Approval: True

and set the “Status” and “Approval Date” in the related steps:

Initial Submission Actions ⓘ Add Existing Add New ▾

Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps ⓘ

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Approval Step			<u>Manager</u>	Final Rejection

Final Approval Actions ⓘ Add Existing Add New ▾

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Field Update	<u>Approved</u>
Edit Remove	Email Alert	<u>Request Approved</u>
Edit Remove	Field Update	<u>setApprovalDate</u>

Final Rejection Actions ⓘ Add Existing Add New ▾

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Email Alert	<u>Request Denied</u>
Edit Remove	Field Update	<u>Reject</u>

Recall Actions ⓘ Add Existing Add New ▾

Action	Type	Description
	Record Lock	Unlock the record for editing

It routes the approval request to the **manager field** defined within the User record.

Approver Settings

Delegated Approver



Manager



Receive Approval Request Emails

Only if I am an approver



☐ Generate new password and notify user immediately

User Manual

There are three main personas involved in using this application: the Office Manager, the Front Desk Agent and of course the Employee. Each of them have a specific experience within the app in terms of available actions, dashboards and data visibility.

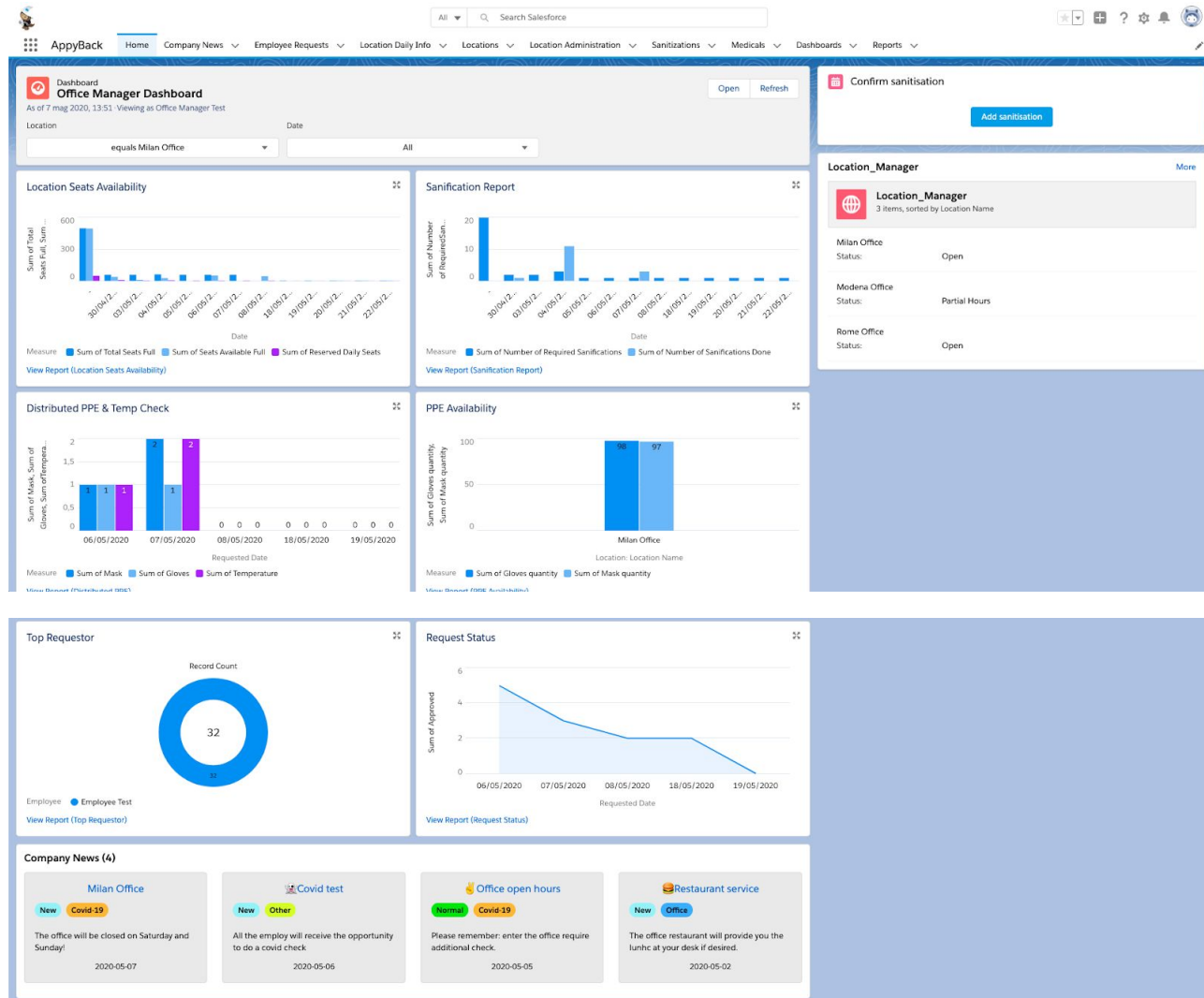
Office Manager

The office manager is in charge of defining office location status and seats available on specific dates. Hereunder the Office Manager Home Page where he can access a useful dashboard with filter for date and location about:

- Location Seats Availability
- Number of Sanifications
- Distributed PPE and Temperature Checks
- PPE Availability
- Top Requestor
- Requests Trend

and below he can access the company news.

From the Home Page he could also add a Sanification record using the related button. Please check Installation & Setup about additional licenses for sanification operators.



From here he can do different activities:

- Create Location
- Define Location Status
- Define seats availabilities for each Location
- Create company news

Create a Location

To create a location , Office Manager has to switch to Location tab and click new

New Location

Information

* Location Name

Owner

Office Manager Test

City

Country

Street Address

Location Phone

Expected Open Date



Location Type

--None--



Location Close Date



Office Manager

Search People...



State/Region

Operating Hours

ZIP Code

Status

--None--



From here Office Manager can define all the information related to the new location.

Update a Location

From the Home Page, Office Manager can access directly to list view, selecting the location he wants to change:

Location_Manager

[More](#)



Location_Manager

3 items, sorted by Location Name

Milan Office

Status: Open

Modena Office

Status: Partial Hours

Rome Office

Status: Open

From here, clicking the button UPDATE LOCATION, he can change the information needed.

Location

Rome Office

Update Location

Printable View

Edit

Related

Details

Location Name

Rome Office

City

Rome

Street Address

Expected Open Date

30/04/2020

Location Close Date

State/Region

ZIP Code

00600

Ongoing Issues

Created By

Marco Dragoni, 28/04/2020, 11:44

Owner

Marco Dragoni

Country

Location Phone

Location Type

Office Building

Office Manager

Giacomo Selmi

Operating Hours

09:00-20:00

Status

Open

Last Modified By

Marco Dragoni, 28/04/2020, 11:44

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

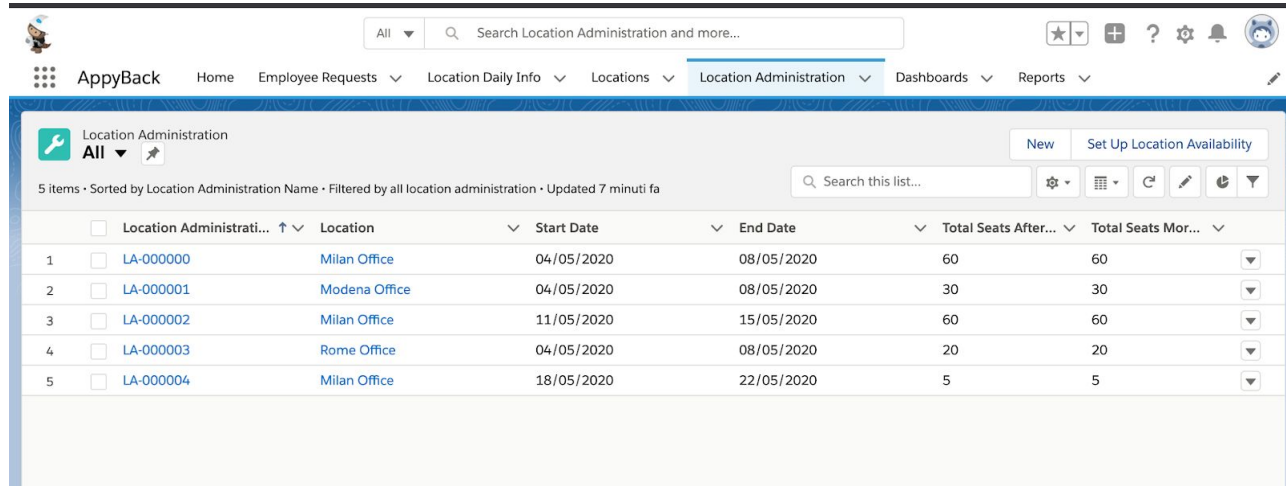
Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Define seats availability

To define seats availability Office Managers can switch to LOCATION ADMINISTRATION tab



The screenshot shows the AppyBack application interface. The top navigation bar includes the AppyBack logo, a search bar, and several icons. The main menu has tabs for Home, Employee Requests, Location Daily Info, Locations, Location Administration (selected), Dashboards, and Reports. The Location Administration tab is active, displaying a table with 5 items. The table columns are: Location Administration Name, Location, Start Date, End Date, Total Seats Afternoon, and Total Seats Morning. The data rows are as follows:

	Location Administration Name	Location	Start Date	End Date	Total Seats Afternoon	Total Seats Morning
1	LA-000000	Milan Office	04/05/2020	08/05/2020	60	60
2	LA-000001	Modena Office	04/05/2020	08/05/2020	30	30
3	LA-000002	Milan Office	11/05/2020	15/05/2020	60	60
4	LA-000003	Rome Office	04/05/2020	08/05/2020	20	20
5	LA-000004	Milan Office	18/05/2020	22/05/2020	5	5

From here clicking NEW ,Office Manager can select dates and availability needed

New Location Administration

Information

* Location

Search Locations...

Milan Office

+ New Location

* End Date

* Total Seats Afternoon

* Reserved Seats

* Number of Sanification

Owner

Office Manager Test

Cancel Save & New Save

Once defined the slots available for each date,clicking SETUP LOCATION AVAILABILITY, he creates slots for each selected date.

Location Administration
LA-000005

[Set Up Location Availability](#)
[Edit](#)

Related
Details

Location
[Milan Office](#)

Start Date
14/05/2020

Total Seats Morning
20

Reserved Seats
5

Created By
[Office Manager Test](#), 02/05/2020, 16:01

Owner
[Office Manager Test](#)

End Date
15/05/2020

Total Seats Afternoon
20

Number of Sanification
2

Number of days requested
1

Last Modified By
[Office Manager Test](#), 02/05/2020, 16:01

Activity

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Company News

Office Manager can add or modify Company news.

Clicking on the Company news tab, he lands in the Company news related list .

AppyBack

Home
Company News
Employee Requests
Location Daily Info
Locations
Location Administration
Sanitizations
Medicals
Dashboards
Reports

All
Search Company News and more...

Company News
All

4 items • Sorted by News Name • Filtered by all company news • Updated alcuni secondi fa

Search this list...

New
Printable View

News Name

1 A-00001

2 A-00002

3 A-00003

4 A-00004

From here on NEW button, he can add a News, filling out all the required fields.

New Company News: Company New RT

Information

News Name

Owner

Office Manager Test

Date Posted

News Type

--None--

Headline

Status

--None--

Description

Public

☐

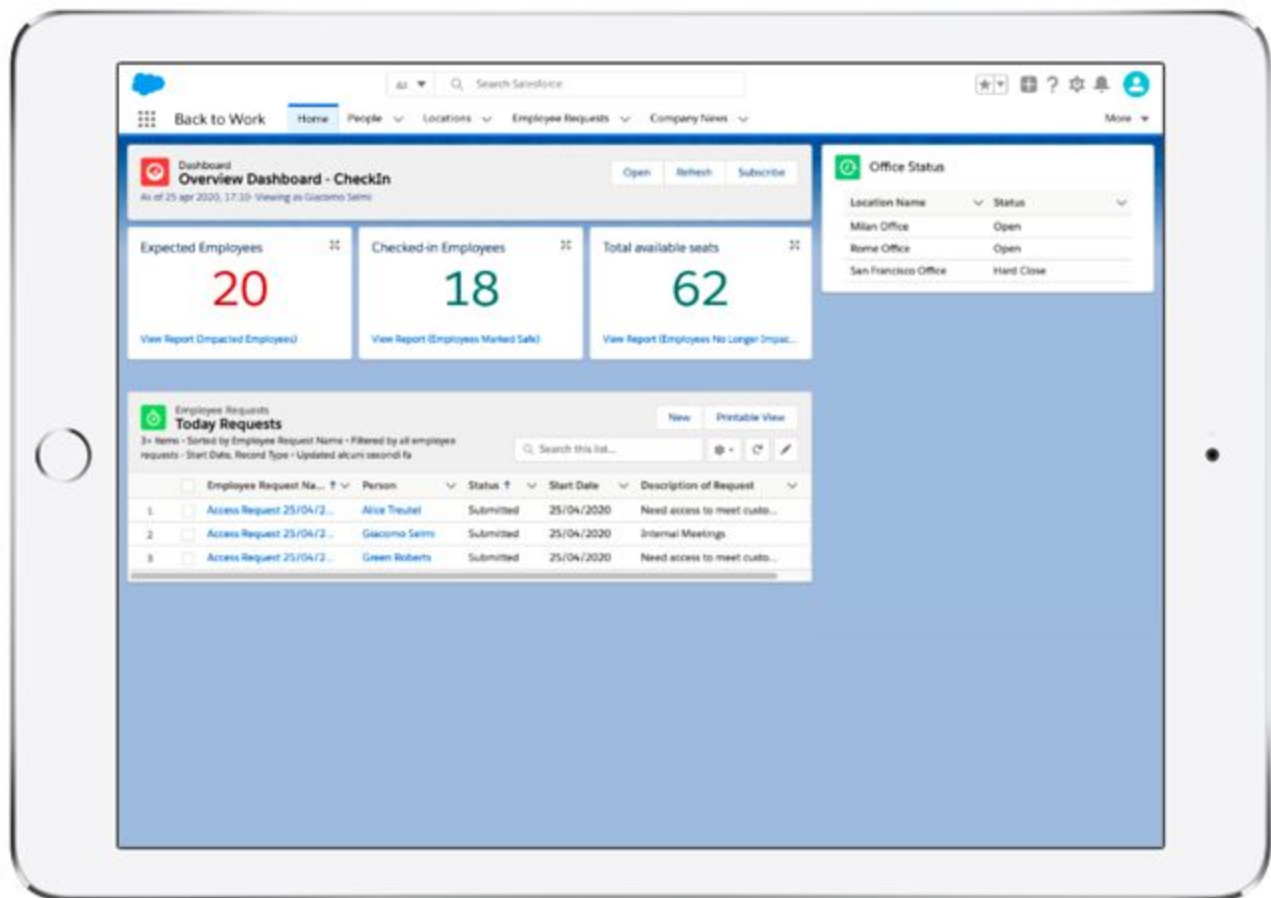
Cancel

Save & New

Save

Front Desk Agent

The Front Desk Agent is in charge of check-in employees and enforcing the final checks before allowing an employee into the office. This user is meant to use a tablet device with a camera to scan the QR code of the approved employee request.

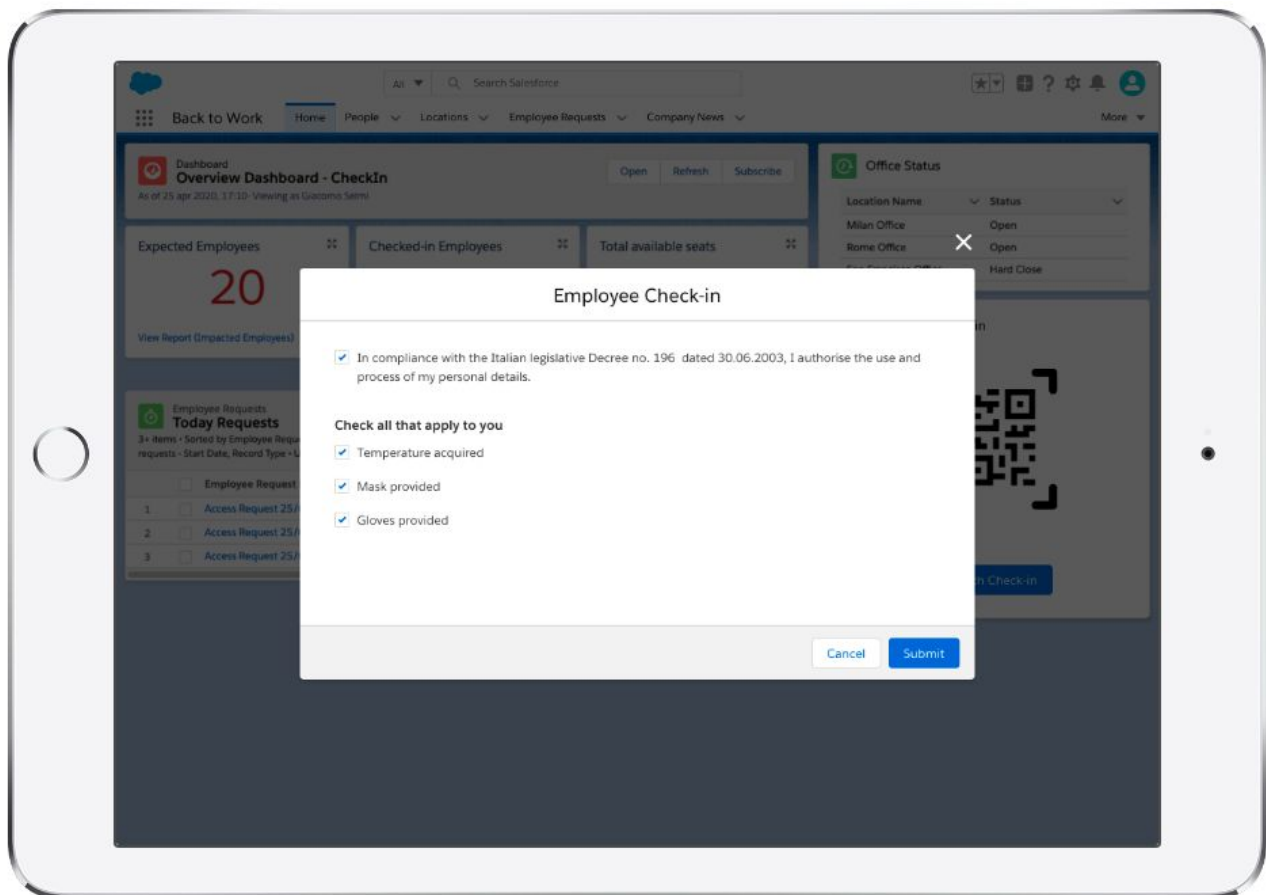


From the home page he/she can have a quick understanding of the expected employees coming to the office that day, the available seats and how many check-ins are already done. She can also see the complete list of the approved requests for the day so she can access the related record for more details.

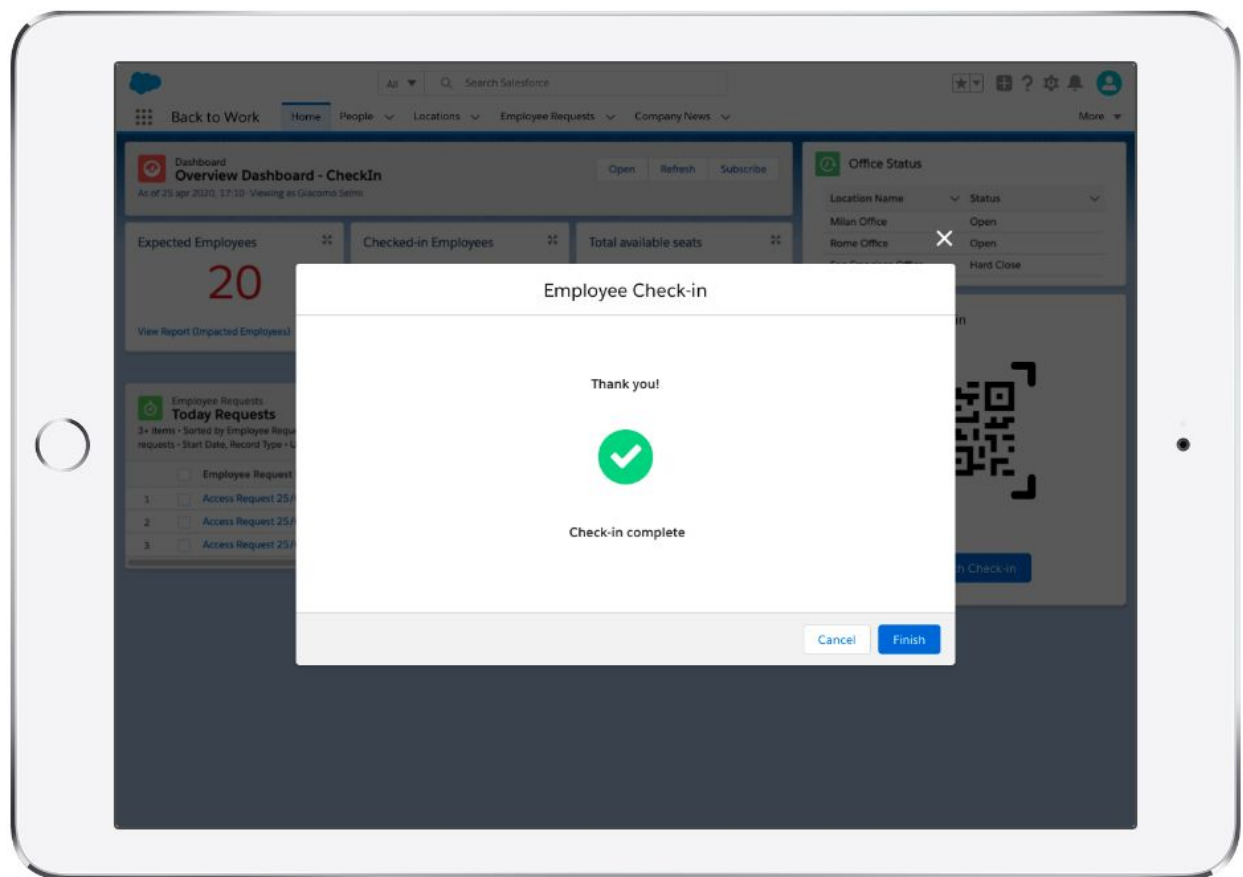
Check-in Process

The main goal of the Front Agent is to welcome the employee and follow the check-in process that starts with the scan of the QR code the employee received via email or within the related Employee Request record.

After scanning the QR code the process checks if the request has been previously approved (automatically or by the employee's manager). If it is approved the front desk agent is requested to check the employee temperature and to provide the requested PPE (mask and gloves). To continue the process the Front Desk Agent needs to check all the flags to complete the check-in process.



Now she just needs to submit the results of the check-in and the employee is allowed to enter the office as requested. If the conditions are not met (delivery of PPE or Temperature not acquired) the entrance to the office is denied.



Employee

The Employee uses the app to book a seat in a specific location and date choosing among the available resources shown during the booking process.

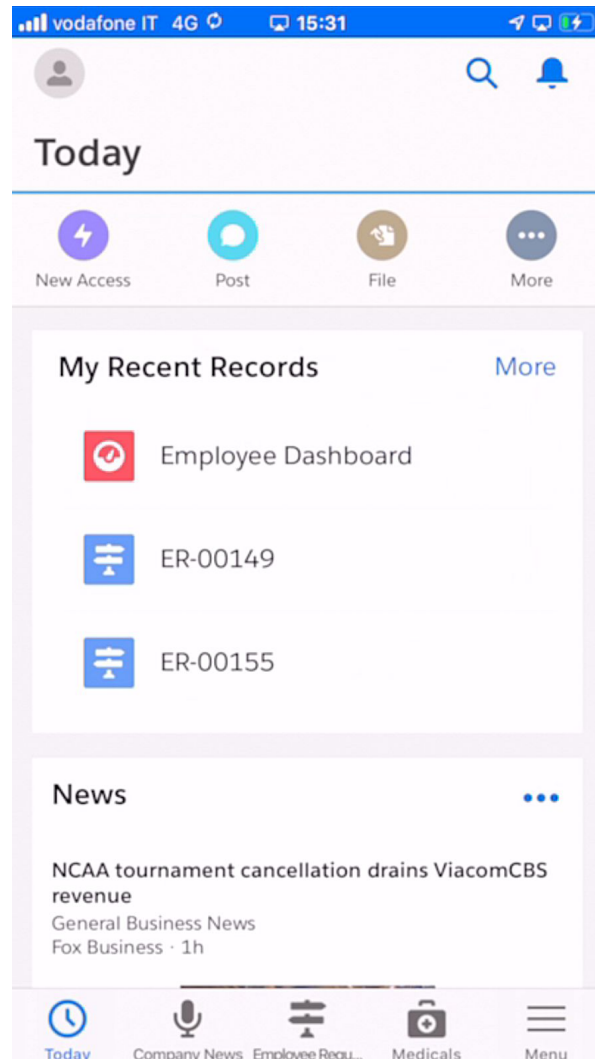
He can access the Appyback application both from desktop and both from mobile.

Mobile Access

After logging in -Salesforce Mobile app, he can access different types of information such as:

- Company News
- Previous Employee Request
- Information related to Medical Documentation

From Today tab, the employee can click “*New Access Button*”, to book his preferred slot.



From here once selected the Location, only available dates are shown.
From here the employee can choose the preferred date and slot.

The screenshot shows a mobile application interface for requesting office access. At the top, the status bar displays 'vodafone IT 4G' and the time '15:34'. Below the status bar, there are two tabs: 'Cancel' and 'New Access', with 'New Access' being the active tab. A progress indicator at the top shows three steps, with the first step being active. The main text reads: 'Please complete the simple steps to gain access to your preferred office'. Below this, there are three sections: 'Office Location' with a dropdown menu showing 'Milan Office', 'Choose Date' with a dropdown menu showing '08/05/2020', and 'Available slots' with three buttons: 'Full Day' (highlighted in blue), 'Morning', and 'Afternoon'. At the bottom right, there is a blue 'Next' button.

Then the employee is requested to fill a questionnaire:

- Privacy Consent
- Reason for Request
- If the visit is Business Critical (this could allow for direct approval of the request, for more info please check [Employee Request Approval Process](#))
- Quarantine information
- Information about actual body temperature
- Information about any past travel to a high risk location

process of my personal details.

Business Details

*Reason for request

Customer related activities ▼

☐ Is your visit Business Critical

Quarantine

☒ I am not currently required to self-quarantine

Check all that apply to you

☒ My temperature is below 37.5°

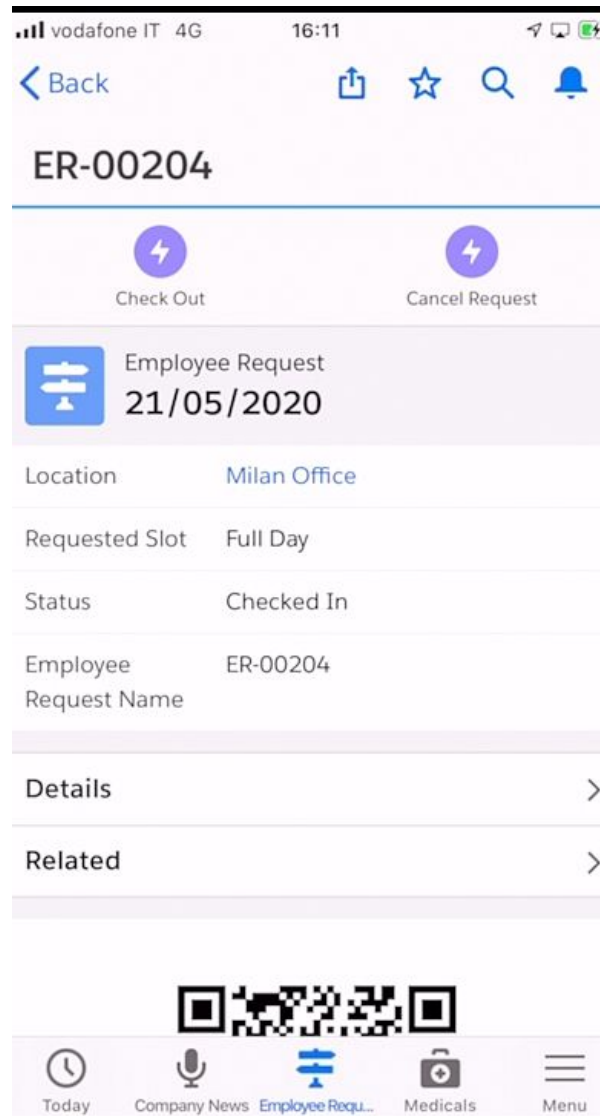
☒ I've not travelled to a high risk location

[Previous](#) [Next](#)

If the request doesn't need additional approval steps, a QR Code is displayed and an email is sent to the employee.

In case of requested approval the employee will receive notification of approval/rejection via email (for more info please check [Employee Request Approval Process](#)).

From the “Employ Request” tab,selecting one of the available requests the employee is directed to the request details where he can see the QR-code for the [check-in process](#) or decide to cancel the request, or at the end of his slot he ha to checkout



In case the Employee is diagnosed with COVID-19 he can inform the company accessing the “Medical Tab” and click the “New” button.

vodafone IT 4G 16:16

Cancel New Medical Save

Information

Covid-19

Currently Impacted ▼

* Start Date

7 May 2020

End of Illness Certificate

☐

Owner

Employee Test

End Date

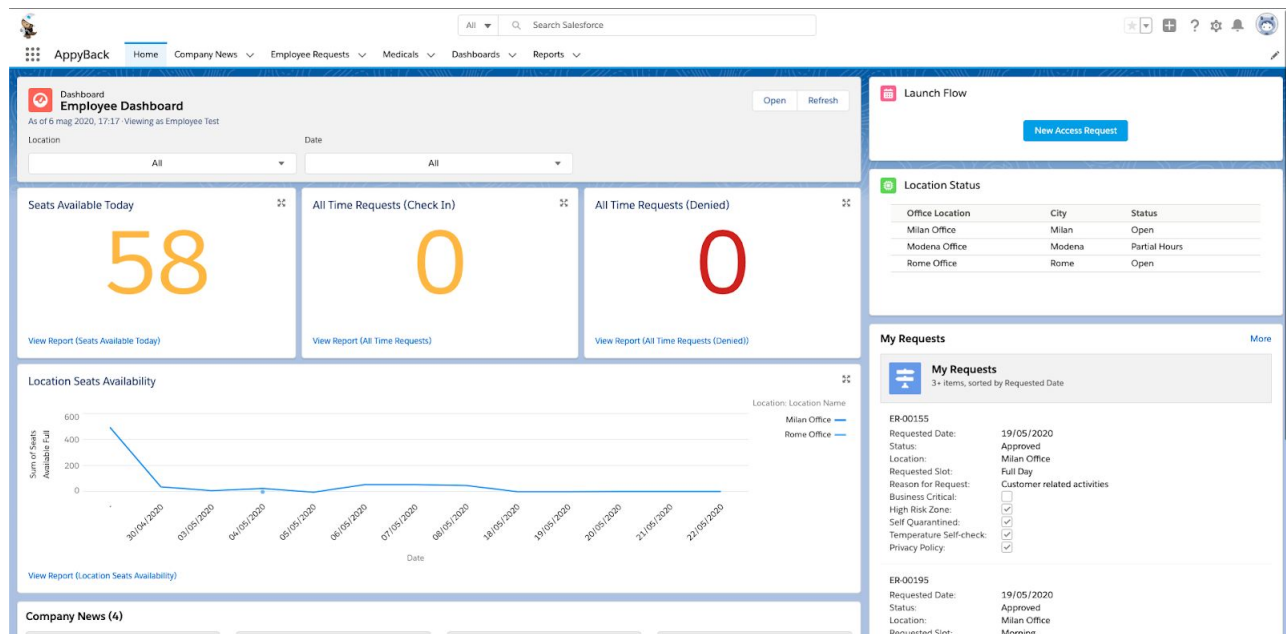
MD Name

He will then enter information about his medical status:

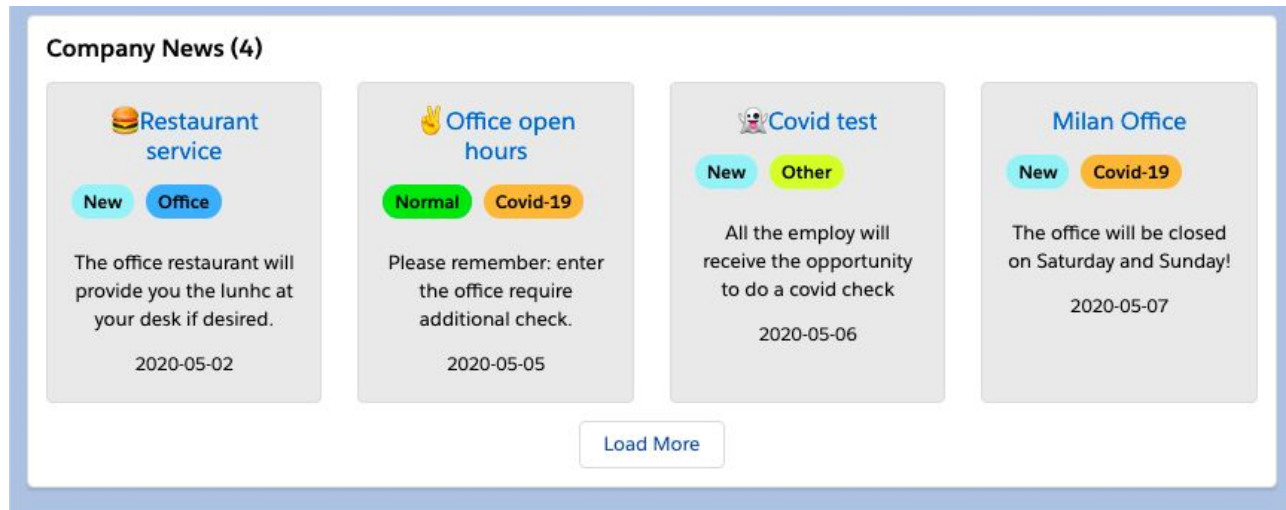
- Covid-19:
 - Currently Impacted: the employee is sick and need to stay in quarantine
 - No Longer Impacted: the employee is not sick anymore but waiting for the certificate
 - Marked Safe: the employee is no longer sick and have the certificate to be uploaded
- Start Date: starting date of the sick period
- End Date: ending date of the sick period
- End of illness: the employee got the certificate from the doctor

Desktop Access

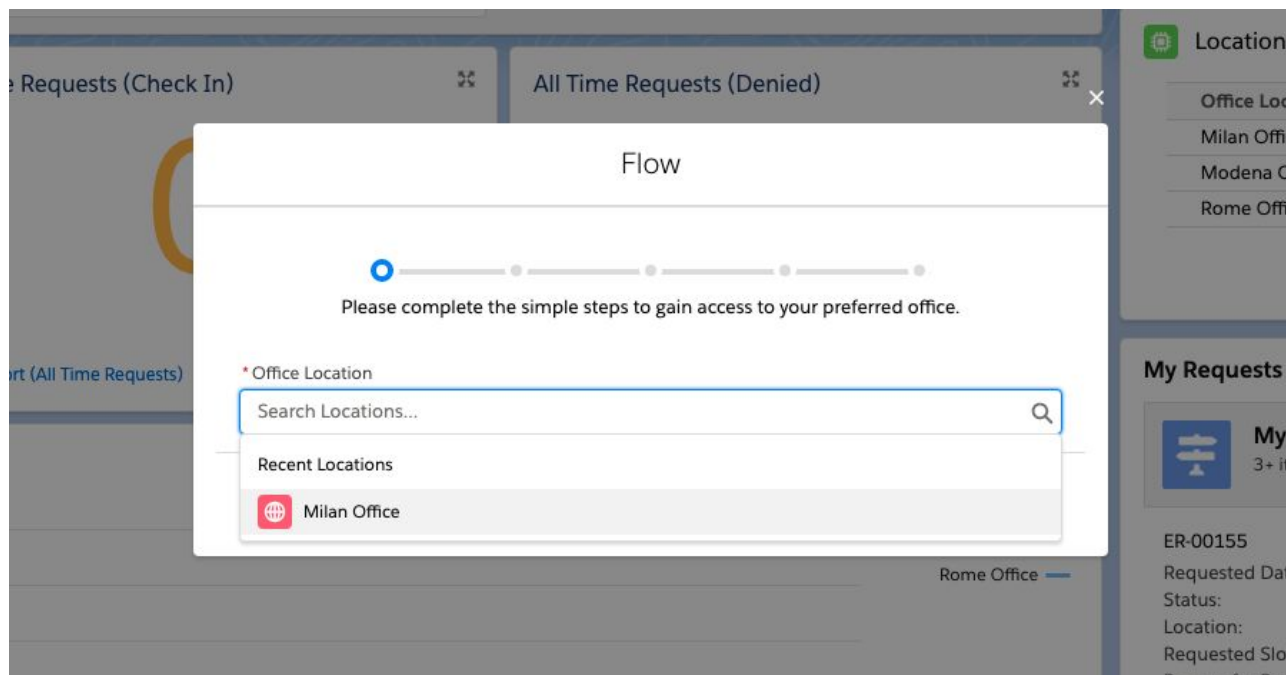
After logging to Appyback from desktop, the employee lands on his home page. From here he can have an overview of location statuses, current availabilities on different locations and dates using the dashboard filters, and all the submitted requests. He can request a new slot, using the “New Access Request” Button on the upper right of the screen.



Below in the home page the employee can access the company news:



First he needs to select the office where to book the slot:



Next, he needs to select the desired dates and required slot (morning, afternoon or full day):

Flow

* Select Date

7/May/2020 - Morning NO - Afternoon YES

Previous Next

Flow

* Available Slot

☐ Morning

☐ Afternoon

☐ Full Day

Previous Next

Then the employee is requested to fill out a questionnaire:

- Privacy Consent
- Reason for Request
- If the visit is Business Critical (this could allow for direct approval of the request, for more info please check [Employee Request Approval Process](#))

- Quarantine information
- Information about actual body temperature
- Information about any past travel to a high risk location

Open Refresh

Flow



Please complete all of the required data to confirm your visit.

☒ In compliance with the Italian legislative Decree no. 196 dated 30/06/2003, I authorize the use and process of my personal details.

Business Details

* Reason for request

Customer related activities

☐ Is your visit Business Critical

Quarantine

☒ I am not currently required to self-quarantine

Check all that apply to you

☒ My temperature is below 37.5°

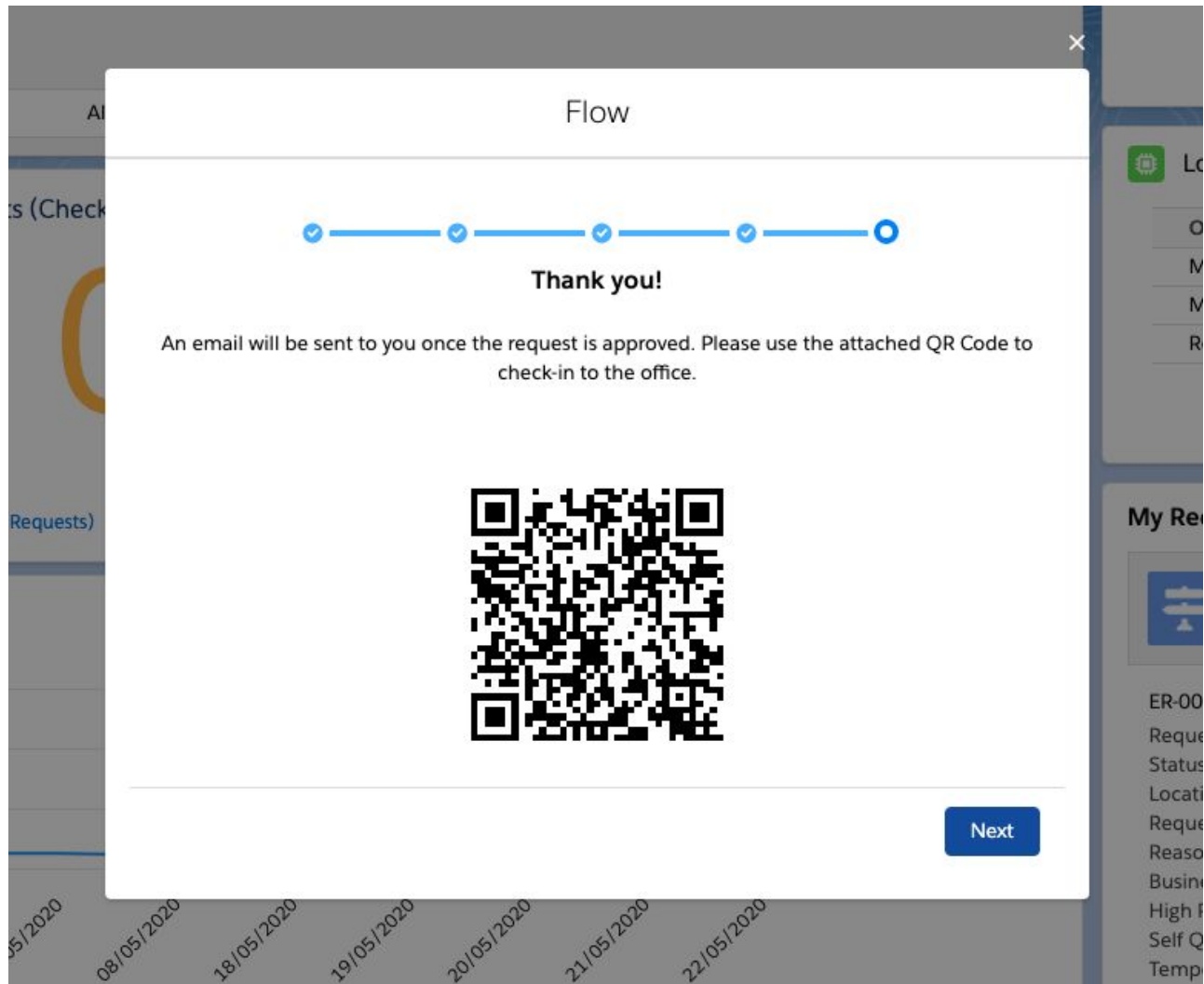
☒ I've not travelled to a high risk location

PreviousNext

07/05/2020 08: 18: 19: 20: 21: 22:

Date

ER-0015
Request
Status:
Location
Request
Reason:
Busines
High Ris
Self Qu
Temper
Privacy



In case of requested approval the employee will receive notification of approval/rejection via email (for more info please check [Employee Request Approval Process](#)).

The Employee's requests are available selecting the related menu Tab:

Employee Requests										
My Requests ▾										
45 Items - Sorted by Requested Date - Filtered by my employee requests - Updated a minute ago										
Employee Reque...	Requested Date ↓	Status	Location	Requested Slot	Reason for Request	Business Critical	High Risk ...	Self Quarant...	Temperatur...	Privacy Policy
1 ER-00198	21/05/2020	Under Approval	Milan Office	Full Day	Customer related activities	☐	☒	☒	☒	☒
2 ER-00200	21/05/2020	Approved	Milan Office	Afternoon	Customer related activities	☒	☒	☒	☒	☒
3 ER-00204	21/05/2020	Approved	Milan Office	Full Day	Customer related activities	☒	☒	☒	☒	☒
4 ER-00155	19/05/2020	Approved	Milan Office	Full Day	Customer related activities	☐	☒	☒	☒	☒
5 ER-00195	19/05/2020	Approved	Milan Office	Morning	Customer related activities	☒	☒	☒	☒	☒
6 ER-00132	18/05/2020	Cancelled	Milan Office	Full Day	Customer related activities	☒	☒	☒	☒	☒
7 ER-00153	18/05/2020	Denied	Milan Office	Afternoon	Customer related activities	☐	☒	☒	☒	☒
8 ER-00169	18/05/2020	Approved	Milan Office	Afternoon	Customer related activities	☐	☒	☒	☒	☒
9 ER-00170	18/05/2020	Draft	Milan Office	Afternoon		☐	☐	☐	☐	☐
10 ER-00171	18/05/2020	Denied	Milan Office	Afternoon	Customer related activities	☐	☐	☐	☐	☒
11 ER-00172	18/05/2020	Draft	Milan Office	Afternoon		☐	☐	☐	☐	☐
12 ER-00192	18/05/2020	Approved	Milan Office	Morning	Customer related activities	☒	☒	☒	☒	☒
13 ER-00150	08/05/2020	Draft	Milan Office	Morning		☐	☐	☐	☐	☐
14 ER-00152	08/05/2020	Approved	Milan Office	Full Day	Customer related activities	☒	☒	☒	☒	☒
15 ER-00154	08/05/2020	Draft	Milan Office	Full Day		☐	☐	☐	☐	☐
16 ER-00156	08/05/2020	Denied	Milan Office	Full Day	Customer related activities	☐	☒	☒	☒	☒
17 ER-00193	08/05/2020	Approved	Milan Office	Morning	Customer related activities	☒	☒	☒	☒	☒
18 ER-00194	08/05/2020	Draft	Milan Office	Afternoon		☐	☐	☐	☐	☐
19 ER-00196	08/05/2020	Approved	Milan Office	Full Day	Customer related activities	☒	☒	☒	☒	☒
20 ER-00197	08/05/2020	Approved	Milan Office	Full Day	Use of office assets	☒	☒	☒	☒	☒
21 ER-00199	08/05/2020	Approved	Milan Office	Morning	Customer related activities	☒	☒	☒	☒	☒
22 ER-00201	08/05/2020	Approved	Milan Office	Full Day	Customer related activities	☒	☒	☒	☒	☒
23 ER-00202	08/05/2020	Approved	Milan Office	Morning	Customer related activities	☒	☒	☒	☒	☒
24 ER-00203	08/05/2020	Approved	Milan Office	Full Day	Customer related activities	☒	☒	☒	☒	☒

Selecting one of the available requests the employee is directed to the request details where he can see the QR-code for the [check-in process](#) or decide to cancel the request.



All








AppyBack

[Home](#)
[Company News](#)
[Employee Requests](#)
[Medicals](#)
[Dashboards](#)
[Reports](#)

Employee Request

21/05/2020

Check Out

Cancel Request

Location

Requested Slot

Status

Employee Request Name

Milan Office

Afternoon

Approved

ER-00200

Details

Related

Employee Request Name

ER-00200

Employee

Employee Test

Location

Milan Office

Location Booking

DI-000276

Requested Slot

Afternoon

Business Critical

☒

Date of Request

21/05/2020

Reason for Request

Customer related activities

Status

Approved

Personal Information

Privacy Policy

☒

High Risk Zone

☒

Temperature Self-check

☒

Self Quarantined

☒

Approval Information

Approved

☒

Approved Date

07/05/2020

Created By

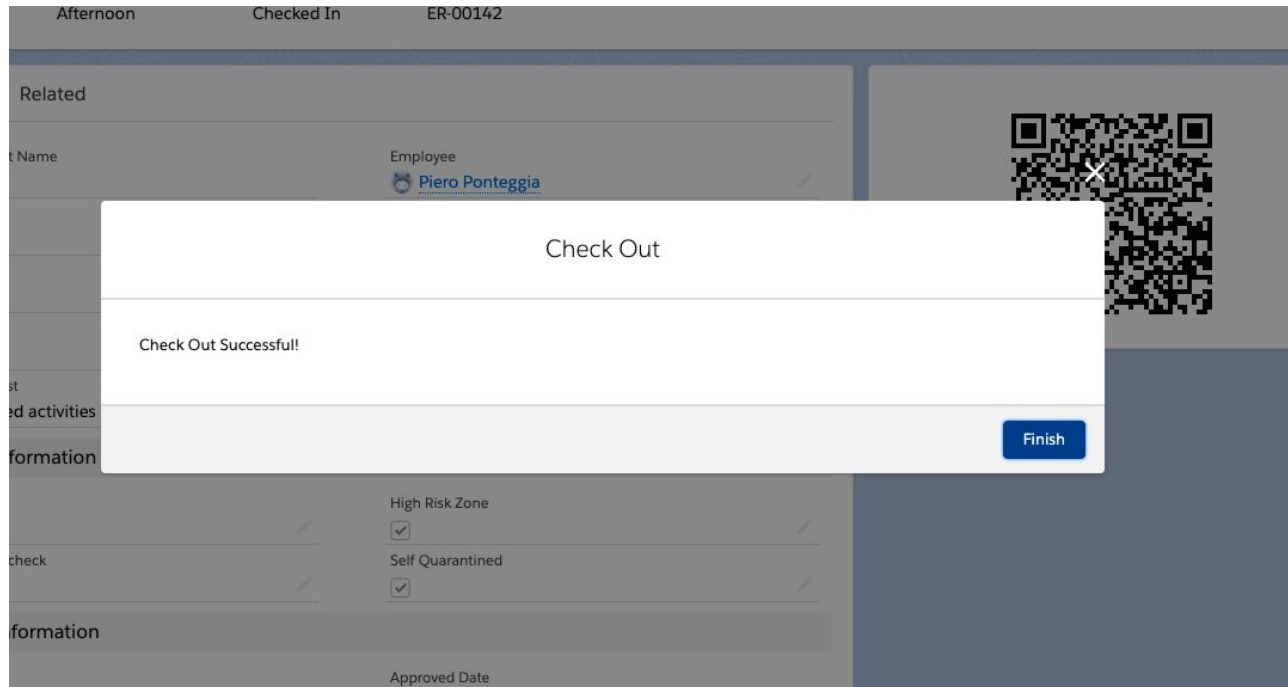
Employee Test, 07/05/2020, 15:32

Last Modified By

Employee Test, 07/05/2020, 15:32



At the end of the day the employee will access the same request to inform the company he's going home, clicking on Ccheck-out:



In case the Employee is diagnosed with COVID-19 he can inform the company accessing the “Medical Tab” and click the “New” button. He will then enter information about his medical status:

- Covid-19:
 - Currently Impacted: the employee is sick and need to stay in quarantine
 - No Longer Impacted: the employee is not sick anymore but waiting for the certificate
 - Marked Safe: the employee is no longer sick and have the certificate to be uploaded
- Start Date: starting date of the sick period
- End Date: ending date of the sick period
- End of illness: the employee got the certificate from the doctor

The screenshot displays the 'Medicals' section of the AppyBack application. A 'New Medical' modal is open, allowing for the creation of a new medical record. The background shows a table of existing medical records with columns for Medical Name, Covid-19 status, Start Date, End Date, End of Illness Certificate, and MD Name.

Medicals
Recently Viewed ▾

4 items • Updated 8 minuti fa

Search this list...

	Medical Name	Covid-19	Start Date	End Date	End of Illness ...	MD Name
1	MD-000009	Currently Impacted	07/05/2020	07/05/2020	☒	Pippo
2	MD-000008					Pippo
3	MD-000007					Dottore
4	MD-000006					Grandi

New Medical

Information

Covid-19

Currently Impacted ▾

Owner

Employee Test

* Start Date

07/05/2020

End Date

21/05/2020

End of Illness Certificate

☐

MD Name

Cancel

Save & New

Save

Once the employee would be declared healthy and obtained the medical certificate he will access the active “Medical” record and click on “Close Impact” where he would set the status to “Marked Safe”, checking the flag for the certificate and inserting the name of the doctor:

Medical MD-000010 Close Impact

Related **Details**

Covid-19
Currently Impacted Owner Employee Test
Start Date 07/05/2020
End of Illness Certificate ☐
Created By Employee Test, 07/05/2020

Activity

Filters: All time • All activities • All types Refresh • Expand All • View All

Close Impact

Covid-19
Marked Safe
End Date 21/05/2020
End of Illness Certificate ☒
MD Name Mr. Doctor

Cancel Save

He can then upload the medical certificate in the related “File” tab:

Medical MD-000010

Related **Details**

Files (0) Add Files

Upload Files
Or drop files

Employee Approval Emails

Once the requested is approved, the employee will receive the related email:

Dear Employee,

Your access request named ER-00206 has been accepted and does not require further approval.

Details:

Office Location: Milan Office

Requested Date: 08/05/2020

Requested Slot: Morning

Please present the QRCode at the Office Reception:



Employee Manager

The Manager is the one who receives approval requests when an employee submits a location slot request. The approval process routes the request to him based on the manager user field. He receives an alert on the mobile app and via email so he can access the related approval page. From here he can Approve or Reject the request and the employee will be notified via email and via app. In case of rejection he can click on the Employee Request Name to edit the “Reason of Rejection” field.

The screenshot shows the Salesforce interface for an 'Employee Request Approval' page. The page is titled 'Approval Request Employee Request Approval' with a 'Pending' status. At the top, there is a navigation bar with 'AppyBack' and various menu items like 'Home', 'Company News', 'Employee Requests', 'Medicals', 'Dashboards', and 'Reports'. A search bar is also present. Below the navigation bar, there are buttons for 'Approve', 'Reject', and 'Reassign'. The main content area is divided into two sections: 'Details' and 'No Comments'. The 'Details' section contains a table with the following information:

Submitter	Date Submitted	Actual Approver	Assigned To
Employee Test	7 May 2020	Manager Test	Manager Test

Below the table, there is a section titled 'Approval Details' with the following fields:

Employee Request Name	Employee
ER-00198	Employee Test
Location	Date of Request
Milan Office	21/05/2020
Reason for Request	Description of Request
Customer related activities	
Owner	
Employee Test	

The 'No Comments' section is currently empty.

He can insert a comment explaining the reason of the decision:

Date Submitted	Actual Approver	Assigned To
7 May 2020	Manager Test	Manager Test

Reject Employee Request

Comments

Sorry not possible in that day to access the office.
Thanks!

CancelReject

Employee Manager Approval Emails

When an approval is requested the manager will receive also an email notification like this:

Approval Request

Inbox x

Employee Test4:27 PM (1 minute ago)

to me

Employee Test has requested your approval for the following item:

To approve or reject this item, click this link <https://seat-booking-demo.my.salesforce.com/p/process/ProcessInstanceWorkitemWizardStageManager?id=04i5I000000gxdy> or reply to this email with one of these words in the first line of the email message: APPROVE, APPROVED, YES, REJECT, REJECTED, NO

If replying via email, you can also add comments on the second line. Comments will be stored with the approval request in Salesforce CRM.

You can also approve, reject and comment on this request from your feed: https://seat-booking-demo.my.salesforce.com/_ui/core/chatter/ui/ChatterPage

Thank you,
Salesforce