



TCS LOCAL CRISIS INFORMATION MANAGEMENT

END USER MANUAL

VERSION 1.0

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FEATURES OF TCS LOCAL CRISIS INFORMATION SYSTEM

Actors: Salesforce Administrators, Store Manager, District Store Manager

In this Local Management Console Application, The District Store Manager will be able to Approve, or Reject without the need for “Submit for Approval Button” for the Request for Update in fields like Store Close time, Mask information of Store object in the case of crisis situation like in **COVID Crisis** in which the Store Manager needs to update the store timing and mask information as the information is changing rapidly.

Additionally, The District Store Manager will also be able to reassign this request to another Manager according to the requirement.

This has been achieved through Workflow field update Rule on the Store object fields which are as follows:

- i. TCSLMC__Store_Close_Time__c
- ii. TCSLMC__Store_Open_Time__c

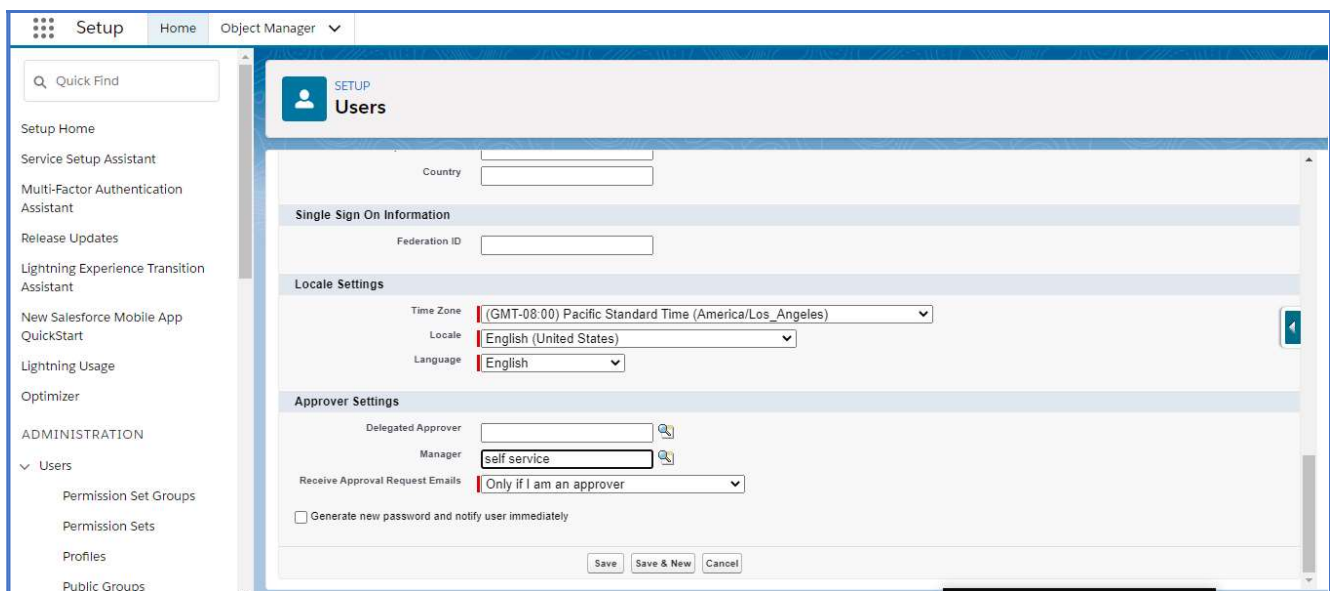
PRE-REQUEST FOR TCS LOCAL CRISIS INFORMATION SYSTEM:

For our Scenario we have used the Following two roles:

- I. Store Manager
- II. District Manager

And we have added the manager's name of Store Manager as a user whose role is District Manager. This makes the District Manager the Approver for the request of Store Manager.

You can also change your role and manager's name of the user according to business requirement. Here, User's manager's name should be made mandatory field to make the approval process working.

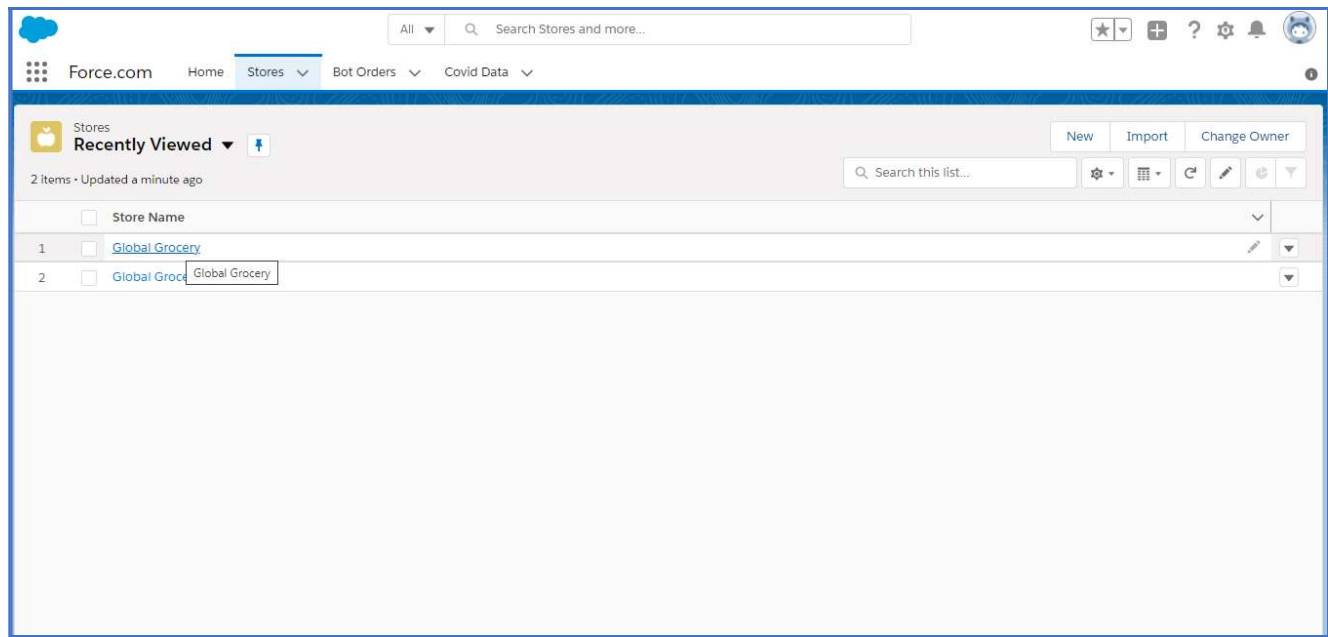


The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, ADMINISTRATION, and a dropdown for 'Users' which includes Permission Set Groups, Permission Sets, Profiles, and Public Groups. The main content area is titled 'SETUP Users' and contains the following fields:

- Country: [Text Field]
- Single Sign On Information: Federation ID [Text Field]
- Locale Settings: Time Zone [Dropdown: (GMT-08:00) Pacific Standard Time (America/Los Angeles)], Locale [Dropdown: English (United States)], Language [Dropdown: English]
- Approver Settings: Delegated Approver [Text Field], Manager [Text Field: self service], Receive Approval Request Emails [Dropdown: Only if I am an approver]
- ☐ Generate new password and notify user immediately
- Buttons: Save, Save & New, Cancel

STEPS FOR TCS LOCAL CRISIS INFORMATION SYSTEM

Step 1: Login as a Store Manager and go to Store Record and Create some records and after creation of data Click on any “Store Object Records” made by User.



Step 2 : Edit from one of these Fields of Store object and click on “Save” button as these field require Approval from District Manager:

- i. Store Open Time
 - ii. Store Close Time
 - iii. Mask Information
- Updation in “Store Open Time” field

Logged in as Saul Goodman (saul.goodman@rep.com) [Log out as Saul Goodman](#)

Force.com Home Stores

Store: Global Grocery

Edit Submit for Approval Delete

Related Details

Information

* Store Name: Global Grocery

Owner: sfdc admin

Phone: 9898767600

Email: global.grocery12@gmail.com

Store Open Time: 9:00 AM

Store Close Time: 9:00 PM

Cancel Save

Step 3 : Now login as a User who is assigned the District Manager Role. Now this User will receive the Notification i.e User(Store Manager) is requesting approval for Store and the Store Manager needs to Click on the Notification.

Logged in as self service (self.service@bitbot.com) [Log out as self service](#)

Force.com Home Stores Bot Orders Covid Data

Quarterly Performance

CLOSED \$0 OPEN (>70%) \$0 GOAL --

As of Today 6:45 AM

500k

400k

300k

200k

100k

0

Feb Mar Apr

■ Closed ■ Goal ■ Closed + Open (>70%)

Add the opportunities you're working on, then come back here to view your performance.

Today's Events

Today's Tasks

Notifications

[Mark all as read](#)

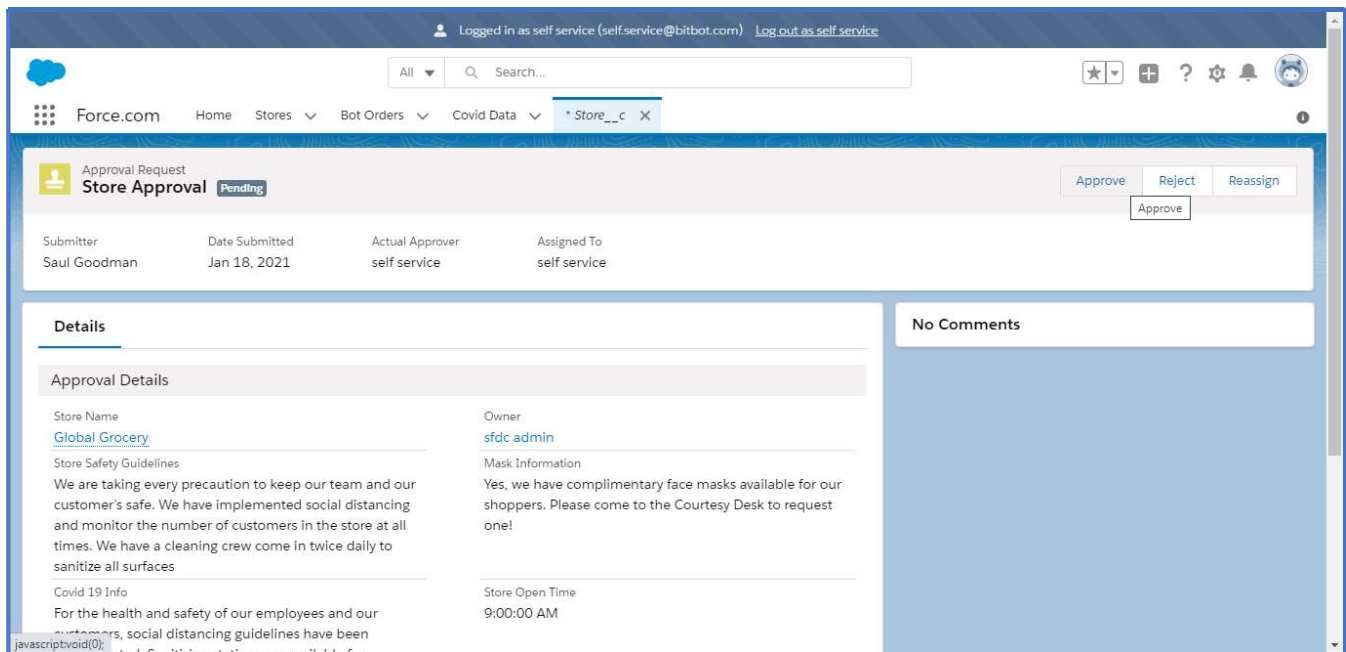
Saul Goodman is requesting approval for store
Store Name: Global Grocery · Owner: sfdc admin · Store Safety Guidelines: We are taking every precaution to keep our team and our customer's safe. We have implemented social distancing and monitor the number of customers in the store at all times. We have a cleaning crew come in twice daily to sanitize all surface...
a minute ago

Approval request for the store is approved
Global Grocery
4 hours ago

Approval request for the store is rejected
Global Grocery
8 hours ago

Approval request for the store is rejected
Global Grocery
19 hours ago

Step 4 : After Clicking on Notification The District Store Manager will be redirected to the record on which his/her Employee has made changes on . Now the Store Manager will be able to Approve or Reject the request for the Record Changes on Store Records Or the Store Manager can also reassign this Approval to another User according to his/her requirement.



Logged in as self service (self.service@bitbot.com) Log out as self service

Force.com Home Stores Bot Orders Covid Data * Store__c

Approval Request
Store Approval Pending

Approve Reject Reassign

Approve

Submitter: Saul Goodman Date Submitted: Jan 18, 2021 Actual Approver: self service Assigned To: self service

Details

Approval Details

Store Name: [Global Grocery](#) Owner: [sfcdc admin](#)

Store Safety Guidelines: We are taking every precaution to keep our team and our customer's safe. We have implemented social distancing and monitor the number of customers in the store at all times. We have a cleaning crew come in twice daily to sanitize all surfaces

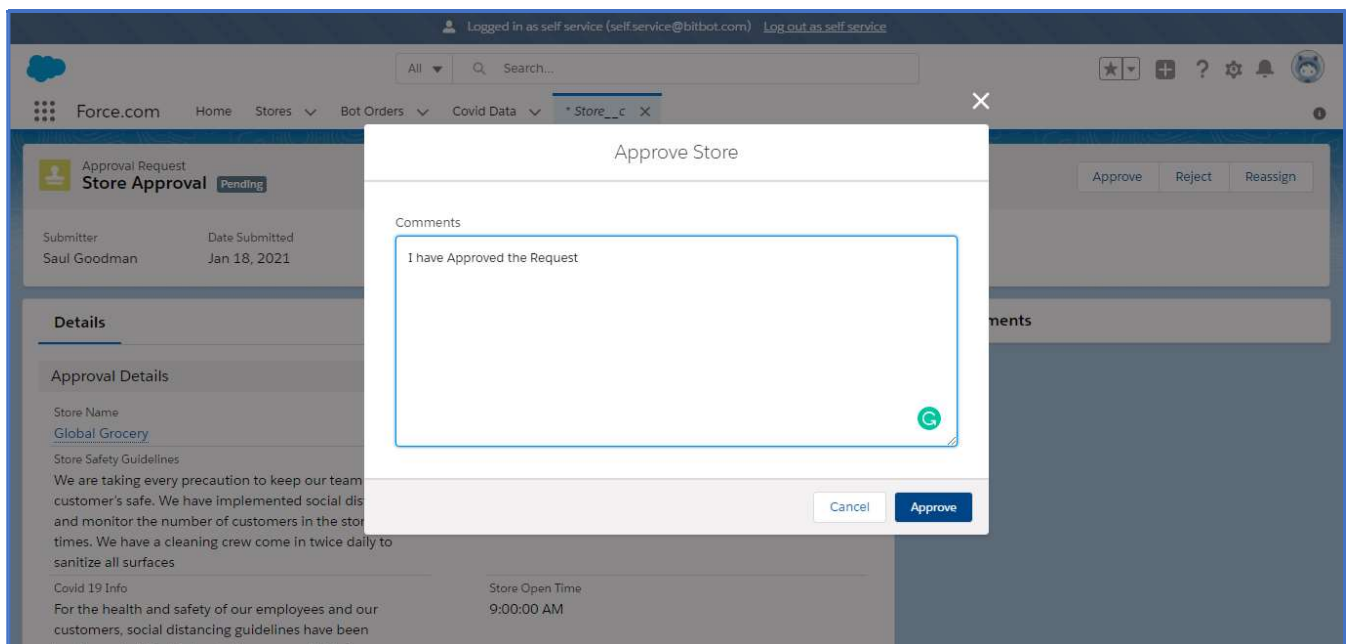
Covid 19 Info: For the health and safety of our employees and our customers, social distancing guidelines have been

Mask Information: Yes, we have complimentary face masks available for our shoppers. Please come to the Courtesy Desk to request one!

Store Open Time: 9:00:00 AM

No Comments

Case 1: Approval of Request:



Logged in as self service (self.service@bitbot.com) Log out as self service

Force.com Home Stores Bot Orders Covid Data * Store__c

Approval Request
Store Approval Pending

Approve Reject Reassign

Approve

Submitter: Saul Goodman Date Submitted: Jan 18, 2021 Actual Approver: self service Assigned To: self service

Details

Approval Details

Store Name: [Global Grocery](#) Owner: [sfcdc admin](#)

Store Safety Guidelines: We are taking every precaution to keep our team and our customer's safe. We have implemented social distancing and monitor the number of customers in the store at all times. We have a cleaning crew come in twice daily to sanitize all surfaces

Covid 19 Info: For the health and safety of our employees and our customers, social distancing guidelines have been

Mask Information: Yes, we have complimentary face masks available for our shoppers. Please come to the Courtesy Desk to request one!

Store Open Time: 9:00:00 AM

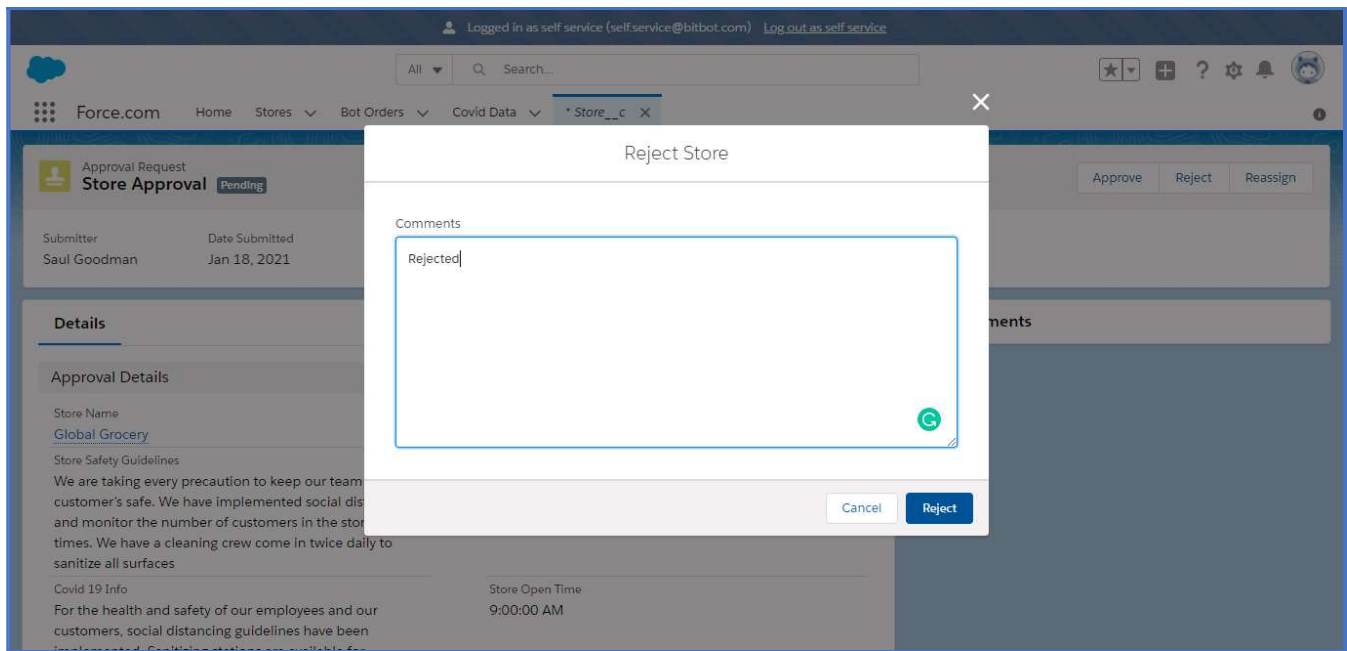
Approve Store

Comments

I have Approved the Request

Cancel Approve

Case 2: Rejection of request



The screenshot shows a Salesforce interface with a 'Reject Store' dialog box open. The background record is an 'Approval Request' for 'Store Approval' with a status of 'Pending'. The submitter is 'Saul Goodman' and the date submitted is 'Jan 18, 2021'. The dialog box has a 'Comments' field with the text 'Rejected' and a 'Reject' button.

Logged in as self.service (self.service@biltbot.com) Log out as self.service

Force.com Home Stores Bot Orders Covid Data * Store__c X

Approval Request
Store Approval Pending

Submitter: Saul Goodman Date Submitted: Jan 18, 2021

Details

Approval Details

Store Name: Global Grocery

Store Safety Guidelines: We are taking every precaution to keep our team customer's safe. We have implemented social dis and monitor the number of customers in the stor times. We have a cleaning crew come in twice daily to sanitize all surfaces

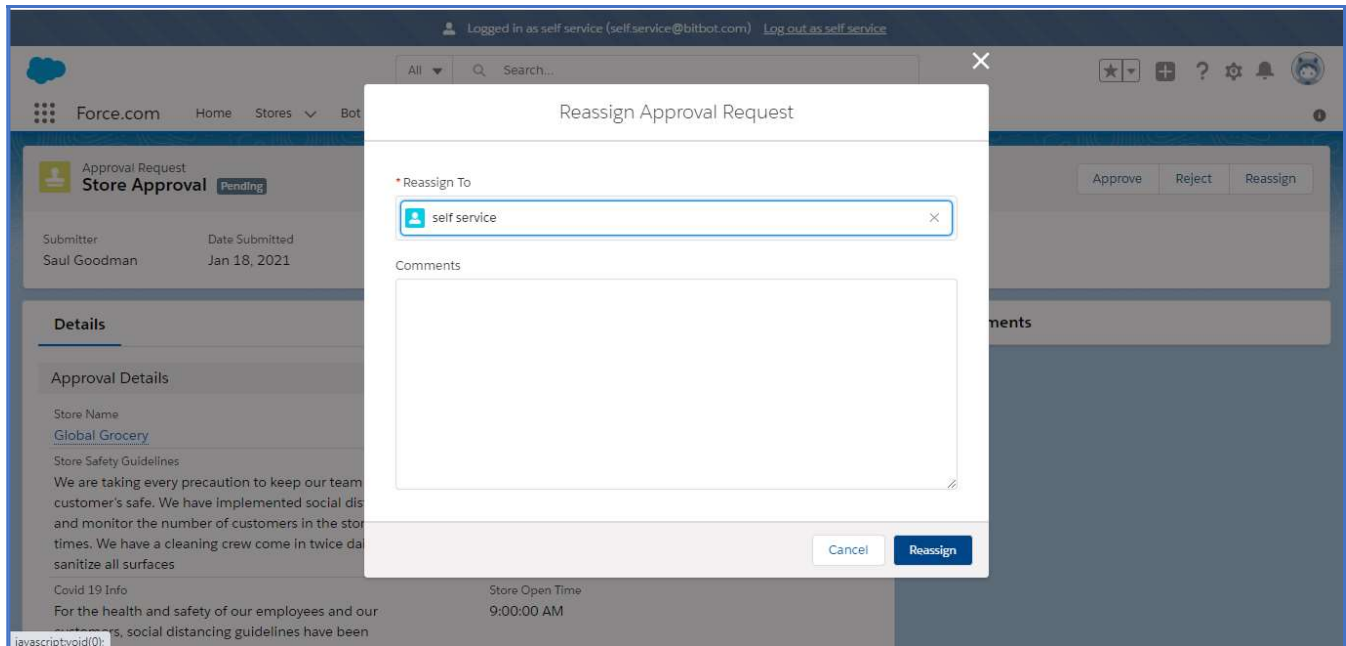
Covid 19 Info: For the health and safety of our employees and our customers, social distancing guidelines have been implemented. Sanitizing stations are available for

Store Open Time: 9:00:00 AM

Comments: Rejected

Cancel Reject

Case 3: Reassign Approval Request to the User



Step 5: Now Changes will be made in the Record only if the Approval is accepted by the District Store Manager else changes saved will not be made in the Store record.
As In this Case the **“Request for Approval”** has been **accepted** and the record changes are reflected in Store records.

