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Public Sector Solutions enable Public Sector entities to build trust by improving constituents’ experiences and providing increased visibility and transparency. Purpose-built industry functionality and the other Salesforce capabilities enable government institutes to increase employee productivity, accelerate time to value, and deepen constituents’ trust with every interaction.

Your users get the tools that let them focus on high-value customer activities instead of routine, administrative tasks. As an admin, you get the trusted power, security, and scalability of the Salesforce platform—tailored to streamline authorization processes.

Public Sector Solutions Overview
Make the authorization processes fast and easy with the new Public Sector Solutions data model. Help your application reviewers and inspectors work better by giving them consolidated data with the Hierarchical View component, automated approval processes, and inspection app. Create an automated process to ensure compliance with regulatory standards. And with your site, give your constituents an all-in-one site for their licensing and permitting needs.

Add-Ons for Public Sector Solutions
Get access to more features with the Public Sector Solutions add-ons.

Set Up and Maintain Public Sector Solutions
Public Sector Solutions along with other Salesforce capabilities makes the licensing and permitting processes and inspections easy to manage.

Common Capabilities in Public Sector Solutions
Set up and manage other Salesforce capabilities that you can use in Public Sector Solutions.

Public Sector Solutions Packages
Set up and manage Public Sector Solutions: License and Permit Management and Inspection Management.

Deploy and Use Analytics for Licenses, Permits, and Inspections
Use the Analytics for Licenses, Permits, and Inspections app to gain intelligent insights that help your agency improve departmental productivity and improve constituent satisfaction.

Which Objects are Available for Experience Cloud Users?
An Experience Cloud license determines the baseline feature access available to an Experience Cloud user. Each Experience Cloud license makes create, read, edit, or delete permissions available to Experience Cloud site users for specific data objects. Assign user permissions for these objects through a profile, permission set, or both.

Extend Public Sector Solutions’ Capabilities with Other Salesforce Products
Use other Salesforce products with Public Sector Solutions.
Public Sector Solutions Overview

Make the authorization processes fast and easy with the new Public Sector Solutions data model. Help your application reviewers and inspectors work better by giving them consolidated data with the Hierarchical View component, automated approval processes, and inspection app. Create an automated process to ensure compliance with regulatory standards. And with your site, give your constituents an all-in-one site for their licensing and permitting needs.

The Salesforce Data Model for Public Sector Solutions
Learn how we adapted the Salesforce data model to create a base for Public Sector Solutions that require a structured, flexible Government to Constituent data model.

Apply Person Accounts in Public Sector Solutions
You need person accounts to store customer information in a single record in Public Sector Solutions. Person accounts bring together fields from Account and Contact to provide a customizable and simplified user experience. Plus, you get the added benefits of person account capabilities, such as duplicate management, Chatter following, and single-step sharing.

Public Sector Solutions Permission Sets
Public Sector Solutions provide special permission sets that give users access to features.

Employee Experience for Public Sector Solutions
Employee Experience for Public Sector Solutions helps employees to be more connected, effective, and productive by centralizing all IT and HR processes. You can digitize personnel forms, streamline employee service requests, and give your employees access to all resources within a unified workspace.

Application Based Pricing
The price of License & Permit Management depends on the number of applications processed. And because License & Permit Management and Emergency Response Management both use the Public Sector Solutions data model, it’s important to keep a track of the object usage.

Enable Notes
Enable Notes to allow an inspector can take notes while on a visit. An inspector can takes notes for an overall visit or for specific work tasks.

Set Up Salesforce Calendar
Set up your Salesforce Calendar so that visits assigned to your inspectors appear as events on their calendars. Compliance officers can check inspector availability before assigning a visit to help reduce scheduling conflicts.

Submit a Public Sector Solutions Case with Salesforce Support
Create support cases with Salesforce Customer Support to get help resolving Public Sector Solutions product issues.

The Salesforce Data Model for Public Sector Solutions
Learn how we adapted the Salesforce data model to create a base for Public Sector Solutions that require a structured, flexible Government to Constituent data model.

Data Model Overview
Learn about the objects and relationships within the Public Sector Solutions data model.

Tools for Getting Oriented to the Data Model
Review the objects that come with Public Sector Solutions using Schema Builder, the data model viewing tool, along with the Object Manager and the Enterprise WSDL file generator.
Create Relationships Between Two Licensing Object Records
Create junction objects to associate records of two objects.

Data Model Overview
Learn about the objects and relationships within the Public Sector Solutions data model.

For details about all Public Sector Solutions objects, see the Public Sector Solutions Developer Guide.
Tools for Getting Oriented to the Data Model

Review the objects that come with Public Sector Solutions using Schema Builder, the data model viewing tool, along with the Object Manager and the Enterprise WSDL file generator.

From Setup, in Quick Find box, find and select *Schema Builder or API*. To review objects with the Object Manager, select *Object Manager* from the top of the Setup page. You can also use a describe call from the API to see the complete list of fields for an object.

Create Relationships Between Two Licensing Object Records

Create junction objects to associate records of two objects.

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<th>Junction sObject</th>
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<td>Business Regulatory Authorization Type</td>
<td>Business Type and Regulatory Authorization Type</td>
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<td>Regulatory Code and Assessment Indicator Definition</td>
<td>Maps a regulatory code with an assessment indicator definition.</td>
<td>Defines the regulatory code measured by an assessment indicator definition. For example, while</td>
</tr>
</tbody>
</table>
Connect two records using a junction object.

1. From the App Launcher, find and open the junction object you want to use, and then click **New**.
2. Select the records that you want to connect using the junction object.
3. Save your changes.

**Apply Person Accounts in Public Sector Solutions**

You need person accounts to store customer information in a single record in Public Sector Solutions. Person accounts bring together fields from Account and Contact to provide a customizable and simplified user experience. Plus, you get the added benefits of person account capabilities, such as duplicate management, Chatter following, and single-step sharing.

**The Person Account Model**

Salesforce Person Accounts store information about individual people by combining certain account and contact fields into one single record. This provides a customizable and simplified user experience. Plus, you get the added benefits of person account capabilities, such as duplicate management, Chatter following, and single-step sharing. The person account model uses the standard Account object to hold the details about a person.

**Enable Person Accounts**

Person accounts let you hold business and personal licenses in one account. You can also manage multiple business licenses using the same account.

**Configure Person Accounts in Public Sector Solutions**

Before you configure person accounts for Public Sector Solutions, enable person accounts for your org.

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**EDITIONS**

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
The Person Account Model

Salesforce Person Accounts store information about individual people by combining certain account and contact fields into one single record. This provides a customizable and simplified user experience. Plus, you get the added benefits of person account capabilities, such as duplicate management, Chatter following, and single-step sharing. The person account model uses the standard Account object to hold the details about a person.

<table>
<thead>
<tr>
<th>Object</th>
<th>Standard or Custom</th>
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</table>
| Account  | Standard           | • Represents all aspects of the person. Data includes personhood details, such as birth date or tax ID number, and dealings with your organization, such as review frequency or service tier  
• Related to cases, individual applications, public complaints | Person account    |

Note: Use the person account record type when a client is a person. You can use person accounts for individuals and business account for businesses. You can also associate individuals with multiple businesses using Account Contact Relation.

SEE ALSO:
- Set Up Contacts to Multiple Accounts

Enable Person Accounts

Person accounts let you hold business and personal licenses in one account. You can also manage multiple business licenses using the same account.

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. Make sure that you meet the following prerequisites.
   a. The account object has at least one record type.
   b. User profiles that have read permission on accounts have read permission on contacts.
The organization-wide default sharing is set so that Contact is Controlled by Parent or both Account and Contact are Private.

2. From Setup, in the Quick Find box, enter Account Settings, and then select Allow Customer Support to enable Person Accounts. We verify that your org meets the prerequisites, and then send you an email with additional information. If you don’t see a message verifying that you meet the prerequisites, go back to step 1.

3. To enable Person Accounts, contact Salesforce Customer Support by logging a case. Refer to the email we sent you about what to include in the case.

4. After Person Accounts is enabled, a person account record type is created.

5. Assign the person account record type to user profiles.

SEE ALSO:
Assign Record Types and Page Layouts in the Enhanced Profile User Interface
Person Accounts

Configure Person Accounts in Public Sector Solutions

Before you configure person accounts for Public Sector Solutions, enable person accounts for your org.

1. From Setup, use the Quick Find box to find and select Custom Settings.

2. In the list of custom settings, click Manage next to the Use Person Accounts custom settings.

3. Click Edit next to Use Person Account. If no record exists, create an entry, and label it Use Person Account.

    Note: The label must be singular, not plural.

4. Click Enable, and save your changes.

Public Sector Solutions Permission Sets

Public Sector Solutions provide special permission sets that give users access to features.

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

Public Sector Access
   Enables user access to all Public Sector Solutions’ objects and features.

Public Sector Field Access
   Enables full user access to all inspection-related objects and features and read-only access to other objects.

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

IndustriesVisit
   Provides access to objects and features of Industries Visit.

Employee Experience for Public Sector
   Provides employees access to Public Sector features and objects.
Employee Experience for Public Sector Solutions

Employee Experience for Public Sector Solutions helps employees to be more connected, effective, and productive by centralizing all IT and HR processes. You can digitize personnel forms, streamline employee service requests, and give your employees access to all resources within a unified workspace.

An Org can use only the Employee Experience for Public Sector subscription for use cases specific to internal operations. An Org is a unique combination of services held in a logically separated database segregated through password-controlled access.

Access the Org (Employees)
Employees are required to use Employee Experience for Public Sector to get access to Public Sector objects and features.

Access the Org (Employee Service Teams)
Teams that support employee services are required to use Public Sector Foundation - Advanced to get access to relevant Public Sector objects and features.

Access the Org (Employees)
Employees are required to use Employee Experience for Public Sector to get access to Public Sector objects and features.

1. Install Employee Workspace, Employee Concierge, and Employee Concierge Bot from work.com.
2. To enable access, from your Public Sector app, assign these permission sets:
   - Employee Experience for Public Sector
   - Employee Productivity Plus Access
   - Employee Productivity Plus User Data Access

EDITIONS
Available in: Lightning Experience
Available in: Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS
To get access to Public Sector objects and features as employees
- Employee Experience for Public Sector
Access the Org (Employee Service Teams)

Teams that support employee services are required to use Public Sector Foundation - Advanced to get access to relevant Public Sector objects and features.

1. Install HR Service Center from work.com.
2. To enable access, from your Public Sector app, assign these permission sets:
   - Employee Experience for Public Sector
   - Employee Service Agent Access
   - Employee Service Agent User Data Access

Application Based Pricing

The price of License & Permit Management depends on the number of applications processed. And because License & Permit Management and Emergency Response Management both use the Public Sector Solutions data model, it’s important to keep a track of the object usage.

To keep a track of number of applications processed, defined application record type configuration by mapping your usage type with the application type and record type. For example, for License and Permit Management, the record type for a Business License Application can be Fire Permit or Building Permit. And for Emergency Response Management, the record type for a Business License Application can be a Business Reopening Permit. And by default, any record type is mapped with the Licensing and Permitting Management application usage type unless it is specially mapped to Emergency Response Management. So if you’re using both License & Permit Management and Emergency Response Management, and you haven’t defined application record type configuration, all the processed applications are counted under License & Permit Management and you end up paying a hiked price. Also, even if you use only License and Permit Management, you must define application record type configuration as a business best practice.

Define Application Record Type Configuration Application Based Pricing

Configure an Application Object Usage Record to help you track the number of applications processed for License & Permit Management and Emergency Response Management.

1. From Setup, under Feature Settings, click Public Sector, and then click Usage Based Pricing.
2. Click New Application Record Type Config.
3. Enter a name for the record.
4. Select the Application Usage Type.
The available options are:

- Licensing and Permitting Management
- Emergency Response Management

5. Select the object name.
   You can select Business License Application or Individual Application.

6. Enter a record type name.

7. Save your changes.

Enable Notes

Enable Notes to allow an inspector can take notes while on a visit. An inspector can takes notes for an overall visit or for specific work tasks.

1. From Setup, enter Notes in the Quick Find box.
2. Select Notes Settings and check Enable Notes.
3. Click Save.

Set Up Salesforce Calendar

Set up your Salesforce Calendar so that visits assigned to your inspectors appear as events on their calendars. Compliance officers can check inspector availability before assigning a visit to help reduce scheduling conflicts.

Enable Salesforce Calendar

Enable your Salesforce Calendar to show visits that are created and assigned to an inspector. These visits appear as events on the inspector’s calendar.

Set Up User Lists for Your Salesforce Calendar

Set up user lists that your compliance officers can use to check the availability of a group of field inspectors before assigning a visit.

Create User Lists for Your Salesforce Calendar

Create user lists to view team calendars for better visibility on visits assigned to a group of field inspectors.

Enable Salesforce Calendar

Enable your Salesforce Calendar to show visits that are created and assigned to an inspector. These visits appear as events on the inspector’s calendar.

1. From Setup, in the Quick Find box, enter Visit Settings, and select Visit Calendar Settings.
2. Enable Add Visits to Salesforce Calendar.
Set Up User Lists for Your Salesforce Calendar

Set up user lists that your compliance officers can use to check the availability of a group of field inspectors before assigning a visit.

1. From Setup, in the Quick Find box, enter Activity Settings, and then select Add user lists to calendar views in Lightning Experience.
2. Save your changes.

Create User Lists for Your Salesforce Calendar

Create user lists to view team calendars for better visibility on visits assigned to a group of field inspectors.

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click Create New View.
3. Name your user list and specify other relevant details on the page.
4. Save your changes.

Submit a Public Sector Solutions Case with Salesforce Support

Create support cases with Salesforce Customer Support to get help resolving Public Sector Solutions product issues.

Before opening a support case, grant login access to your org to Salesforce Customer Support. For instructions, see Grant Login Access. Then, make sure you have all the pertinent information about your issue at hand so that you can complete the submission form.

Create a Support Case

Log a new case with support if you need certain permissions enabled or are experiencing technical difficulties with your product.

Check and Edit an Existing Case

Review the status of your existing case, attach relevant files, or update the case’s severity.

Create a Support Case

Log a new case with support if you need certain permissions enabled or are experiencing technical difficulties with your product.

1. Log in to Salesforce Help.
2. Click the My Cases or Contact Support tab. Then, click Create a Case.
3. Click the Product or Technical Support tile.
4. Complete the form.
   a. For Product, select Industry.
b. For Topic, select Health & Insurance or Public Sector (Vlocity).

c. For the case description, summarize the steps to reproduce your issue, and include the names and URLs of affected records and objects.

d. Upload supporting screenshots or other files.

e. To keep other people in your org apprised of the case, add their email addresses under Case Collaborators.

5. Click Create Case.

Check and Edit an Existing Case

Review the status of your existing case, attach relevant files, or update the case’s severity.

1. Log in to Salesforce Help.
2. Click My Cases.
3. Click the case number.

Tip: To attach supporting files after a case is created, on the Activity tab of the case page, click , upload your file, and then click Add.
Add-Ons for Public Sector Solutions

Get access to more features with the Public Sector Solutions add-ons.

- **Public Sector Application Forms** provide government constituents access to Public Sector Solutions through sites and Vlocity OmniScript forms. With the forms, these constituents can submit complaints and applications. The License and Permit Management template lets you give access to a constituent’s profile, draft pre-screens, application submissions, inspections, violations, enforcement actions, and authorizations.

- **Public Sector Mobile Inspections** gives your inspectors access to the Public Sector Solutions Mobile App. The Public Sector Solutions Mobile App lets inspectors access scheduled visits, tasks, regulatory codes, inspections, and assessments. The app can help inspectors complete their work by documenting the completion of their task and findings, including related notes and photo or video uploads.

Set Up and Maintain Public Sector Solutions

Public Sector Solutions along with other Salesforce capabilities makes the licensing and permitting processes and inspections easy to manage.

**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.

**Vlocity Package Installation**

Public Sector Solutions use Vlocity Digital Interaction Framework, which is installed via a managed package. The Vlocity INS package lets you use OmniScript and DataRaptor, which helps you to design license assessment and application forms.

**Configure Public Sector Solutions**

Configure your users for Public Sector Solutions, and assign permission sets so that they have access to inspections, applications, and more.

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, use the Quick Find box to find and 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.
Vlocity Package Installation

Public Sector Solutions use Vlocity Digital Interaction Framework, which is installed via a managed package. The Vlocity INS package lets you use OmniScript and DataRaptor, which helps you to design license assessment and application forms.

Download the INS 109 package, and stay up to date with the latest upgrades so that DataRaptor is updated with the new Public Sector Solutions' objects. To download the INS package, click the INS tab of the Vlocity Package Download Index. Manage the Vlocity Release for version control and integrate tools to manage your Vlocity releases across your enterprise.

**Important:**
- To continue using OmniScript and DataRaptor, new Public Sector Solutions users must install the OmniStudio managed package or the Public Sector Solutions - Foundation package.
- No action is required from existing Public Sector Solutions users as Salesforce currently supports OmniScripts, Integration Procedures, DataRaptors, and FlexCards with the INS package. But to use Business Rules Engine, existing users must assign Rules Engine Designer and Rules Engine Runtime permission sets.

For more information on how to install the Vlocity INS package, see Install Vlocity INS Package

**Important:** You need login credentials to access the Vlocity documents. If you’re a Public Sector Solutions user, you can request access by filling out this form.

Import Process Library

The Vlocity Industry Process Library is the place to find the best practices for key workflows. These processes and digital assets can be downloaded on demand from this site, allowing you to quickly deploy them to accelerate your digital transformation.

SEE ALSO:
- OmniScript
- DataRaptor

Import Process Library

The Vlocity Industry Process Library is the place to find the best practices for key workflows. These processes and digital assets can be downloaded on demand from this site, allowing you to quickly deploy them to accelerate your digital transformation.

2. Click for the category, and click the Pre-Screen workflow.
3. Click Install Datapack.
4. To download the Pre-Screen JSON datapack file, click .
5. Go to your Salesforce org and, from the App Launcher, find and select Vlocity OmniScript Designer.
6. Click Import.
7. Click Browse, and select the file you downloaded.
8. Click Done.
9. Repeat steps 2 to 8 to install these workflows.
   • Business License Application
   • Individual Application
   • Public Complaints
   • License Search
   • License & Permit List Component

The OmniScript workflow appears in the Vlocity OmniScript Designer page.

SEE ALSO:
   Vlocity Industry Process Library

Configure Public Sector Solutions

Configure your users for Public Sector Solutions, and assign permission sets so that they have access to inspections, applications, and more.

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

Create Users
Create user accounts for Public Sector Solutions' personas such as reviewers and field inspectors.

Create a Visit Record Page
A visit record page allows your user to access visit related data.

Create a Signature Record Page
A signature record page allows your inspection agents to capture signature on a visit.

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, use the Quick find box to find and select Profiles.
2. Clone the Standard User profile.
3. Give the profile a name to identify the type of user, such as Reviewer or Compliance Manager.
4. Save your changes.
5. Click Edit, and give permission to Public Sector Solutions objects.
6. Save your changes.

You can now create users based on this profile.
Create Users

Create user accounts for Public Sector Solutions’ personas such as reviewers and field inspectors.

1. From Setup, use the Quick find box to find and select Users.
2. Create a user, and assign it the Salesforce user license.
3. Based on the persona of the user, assign a profile, such as Reviewer or Compliance Manager.
4. Save your changes.

Create a Visit Record Page

A visit record page allows your user to access visit related data.

1. From Setup, enter Lightning App Builder in the Quick Find box, and then select Lightning App Builder.
2. Click New.
3. Select Record Page, and click Next.
4. Enter a label, such as Visit Record Page.
5. In Object, select Visit and then click Next.
6. Select the One Region layout, and click Finish.
7. Select Phone from the dropdown list on the top of the page.
8. Drag the Inspection Details component onto the page and then click anywhere on the component to select it.
9. In the Properties pane, review the attributes. To change the fields and their display sequence, click Select.
10. Now, drag the Inspection Action component onto the page.
11. Drag the Inspection Tab Container component onto the page. You can select if or not you want to show the progress ring on the page.
12. Save your changes.

Create a Signature Record Page

A signature record page allows your inspection agents to capture signature on a visit.

1. From Setup, enter Lightning App Builder in the Quick Find box, and then select Lightning App Builder.
2. Click New.
3. Click Edit for a Signature Record Page, and click Next.
4. Select Phone from the dropdown list on the top of the page.
5. Click anywhere on the component to select it.
6. In the Properties pane, enter an acknowledgement text. You can also configure if you want to show the signer name and date and time on the page.
7. Save your changes.
Common Capabilities in Public Sector Solutions

Set up and manage other Salesforce capabilities that you can use in Public Sector Solutions.

**Digital Interaction Platform**

The Vlocity Digital Interaction Platform is a set of services, components, and data model objects that allows you to create guided interactions using data from your Salesforce org and external sources.

**Chatter**

Use Chatter to stay connected with your constituents and across the org internally.

**Flows**

A flow is the part of Salesforce Flow that collects data and performs actions in your Salesforce org or an external system. Salesforce Flow provides two types of flows: screen flows and autolaunched flows.

**Process Builder**

Process Builder helps you automate your business processes and gives you a graphical representation as you build it. For example, you can use the process builder to automate an approval process.

**Notification**

Send notifications to constituents when the status of their application changes or an inspection is scheduled for their application. You can also send notifications to a person when action is taken on a complaint that they registered.

**Digital Interaction Platform**

The Vlocity Digital Interaction Platform is a set of services, components, and data model objects that allows you to create guided interactions using data from your Salesforce org and external sources.

Public Sector Solutions includes the Vlocity Digital Interaction Framework, which includes OmniScript and DataRaptor as well as other capabilities such as the Card Frameworks, Calculation Procedures, and Integration Procedures. See the Vlocity Success Portal for details on all Digital Interaction Framework capabilities. OmniScripts and DataRaptors are the basic building blocks of the Vlocity Digital Interaction Platform. OmniScripts contain the interaction logic and DataRaptors transfer data between OmniScripts and Salesforce.

**OmniScript**

With OmniScripts, you can create a guided interaction to match the flow of your process. OmniScript is a declarative scripting tool that allows you to create a script with clicks and not code.

**DataRaptor**

Vlocity DataRaptor moves data into and out of Vlocity applications. It’s commonly referred to as an extract, transform, and load application. DataRaptors allows you to read and write data to and from your Salesforce org.

SEE ALSO:

- Digital Interaction Platform Basics
OmniScript

With OmniScripts, you can create a guided interaction to match the flow of your process. OmniScript is a declarative scripting tool that allows you to create a script with clicks and not code.

Drag different types of elements on to the structure of an OmniScript to:

- Create branches that dynamically adjust the controls and enable or disable steps, depending on choices the user makes in the guided process.
- Group items together by creating a step or displaying a list of items the customer can select from.
- Send and receive data
- Create a function such as a formula.

SEE ALSO:

OmniScript Basics
OmniScript

DataRaptor

Vlocity DataRaptor moves data into and out of Vlocity applications. It’s commonly referred to as an extract, transform, and load application. DataRaptors allows you to read and write data to and from your Salesforce org.

SEE ALSO:

DataRaptor Basics

Chatter

Use Chatter to stay connected with your constituents and across the org internally.

Enable Chatter for the Business Application, Individual Application, and Regulatory Code Violation objects. An applicant or a violator can use the Chatter option in the site to seek more information from a reviewer or a compliance manager.

SEE ALSO:

Control Chatter Access Through User Profiles
Flows

A flow is the part of Salesforce Flow that collects data and performs actions in your Salesforce org or an external system. Salesforce Flow provides two types of flows: screen flows and autolaunched flows.

You can use an autolaunched flow to create a flow that auto-assigns Vlocity licenses to site users.

SEE ALSO:

Flows

Process Builder

Process Builder helps you automate your business processes and gives you a graphical representation as you build it. For example, you can use the process builder to automate an approval process.

SEE ALSO:

Process Builder

Notification

Send notifications to constituents when the status of their application changes or an inspection is scheduled for their application. You can also send notifications to a person when action is taken on a complaint that they registered.

SEE ALSO:

Manage Your Notifications with Notification Builder

Public Sector Solutions Packages

Set up and manage Public Sector Solutions: License and Permit Management and Inspection Management.

Licensing and Permitting Management

Manage all your licensing and permitting needs with Licensing and Permitting Management. You can configure the authorization process, create guided interaction forms, define approval processes for various licenses and permits, and manage the Experience Cloud site.

Inspection Management

Inspection Management makes managing inspections easy. You can create assessment indicators, create visits, and dynamic inspection results. You can also create violation types and enforcement actions.

Emergency Response Management

Quickly deploy a single digital destination for constituents and sites to access emergency program information and incident updates.
Business Rules Engine
Configure Business Rules Engine to allow your users to automate complex policy decisions and efficiently determine constituents’ program eligibility.

Licensing and Permitting Management
Manage all your licensing and permitting needs with Licensing and Permitting Management. You can configure the authorization process, create guided interaction forms, define approval processes for various licenses and permits, and manage the Experience Cloud site.

Configure License Authorization
Configure different types of licenses and permits for businesses and different ones for individuals. Or, you can have the same type of licenses for both.

Set Up License Application Approval Process
An automated approval process enables you to respond to approval requests directly from the home page, or through in-app and email notifications. You can also approve requests using the Salesforce App. If you can’t respond, transfer multiple approval requests to a colleague.

Intelligent Document Automation
Simplify the document management process to reduce manual data entry. And you can get constituent-submitted information such as business license applications, contact information, or other documents in one place from intake through processing. Route incoming documents automatically to the proper queue for faster review and approval.

Intelligent Form Reader
Intelligent Form Reader uses optical character recognition (OCR) technology to extract data from your constituents’ submitted documents automatically. Based on the kind of form you data is from, map the fields in the form to the fields in Public Sector Solutions.

Manage Salesforce Sites
Sites are a great way to share information and collaborate with constituents. In the site, constituents can look for license and permit requirements and information, apply for a license or permit, check their application, inspection, and violations status.

Design Dynamic License Assessment and Application Forms
Users can assess their license needs and apply for the licenses that they need using forms that you design. You can make assessment and application forms available on Salesforce site using Omniscript Lightning Web Components.

Configure License Authorization
Configure different types of licenses and permits for businesses and different ones for individuals. Or, you can have the same type of licenses for both.

You can bulk import data using Data Loader. When importing data, Data Loader reads, extracts, and loads data from comma-separated values (CSV) files or from a database connection. When exporting data, it outputs CSV files.

Assign License and Permit Management Permission Set Licenses
Permission set licenses enable users to access features beyond the features included in their basic user licenses. To enable users to use Licensing and Permitting Management, assign them the necessary permission set licenses.
Configure a Business Profile
Create a business profile by associating a business account and other business details such as business tax identifier. Any business license application for a business is available in business account’s related list.

Create a Regulatory Authority
Regulatory authorities have the power to issue licenses and permits. A government department that issues licenses is an example for a regulatory authority.

Create an Authorization Activity
Configure activities that need a license or a permit. For example, to operate a salon, a constituent needs the appropriate licenses and permits.

Create a License or a Permit Type
Licenses and permits give regulatory authorization to a business, an individual, or any associated asset or location. An example of business license is an establishment license and an individual license is a dentist or a cosmetologist license.

Create Record Types for Each License Type
Create record types so that Business License Applications and Individual Applications have different application statuses, categories, and approval processes depending on the license or permit type. We recommend that you have the same name for record types as license types.

Configure Occupational Licenses
Individuals can apply for occupational licenses that require completion of a course or an examination. Create records for course offerings or examinations, so when an individual applies for a license from the site using these course or examination records, Training Course Participant and Person Examination records get created.

Configure Unified View of Government
Give your reviewers a consolidated view of a business’ applications, inspections, violations, and enforcement actions by adding the Hierarchical View component to the account record page. You can also add the component to the application, inspection, or a complaint page.

Configure Business Regulatory Authorization Type Dependencies
Business Regulatory Authorization Type Dependencies determine one permit’s dependency on another.

SEE ALSO:
Data Loader

Assign License and Permit Management Permission Set Licenses
Permission set licenses enable users to access features beyond the features included in their basic user licenses. To enable users to use Licensing and Permitting Management, assign them the necessary permission set licenses.

1. In Setup, use the Quick Find box to find and select Users, and then select the users who you want to assign 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.
<table>
<thead>
<tr>
<th>Permission Set License</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Sector Access</td>
<td>Enables user access to all Public Sector Solutions' objects and features.</td>
</tr>
<tr>
<td>ActionPlans</td>
<td>Provides users with access to Action Plans so that they can create action plan templates and assign tasks related to service requests.</td>
</tr>
<tr>
<td>IndustriesVisit</td>
<td>Provides access to objects and features of Industries Visit.</td>
</tr>
<tr>
<td>LPI Community</td>
<td>Provides access to Licensing and Permitting data for site users.</td>
</tr>
</tbody>
</table>

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.

### Configure a Business Profile

Create a business profile by associating a business account and other business details such as business tax identifier. Any business license application for a business is available in business account’s related list.

- **Note:** Individuals registering in the site are person accounts and all individual applications are available in the person account related list.

1. From the App Launcher, find and select **Business Profile**, and then click **New**.
2. Select a business account.
3. Enter the associated Business Tax Identifier and Business Operating Name.
4. Select a Business Structure.
5. Save your changes.

### Create a Regulatory Authority

Regulatory authorities have the power to issue licenses and permits. A government department that issues licenses is an example for a regulatory authority.

1. From the App Launcher, find and open **Regulatory Authorities**, and then click **New**.
2. Enter a name and description of the regulatory authority.
3. Save your changes.
Create an Authorization Activity

Configure activities that need a license or a permit. For example, to operate a salon, a constituent needs the appropriate licenses and permits.

1. From the App Launcher, find and open Business Type, and then click New.
2. Enter a name for the business type.
3. Select an authorization activity type.
4. Save your changes.

Create a License or a Permit Type

Licenses and permits give regulatory authorization to a business, an individual, or any associated asset or location. An example of business license is an establishment license and an individual license is a dentist or a cosmetologist license.

1. From the App Launcher, find and open Regulatory Authorization Type, and then click New.
2. Enter a name for the license or permit type.
3. Select a regulatory authorization category.
4. Save your changes.

Create Record Types for Each License Type

Create record types so that Business License Applications and Individual Applications have different application statuses, categories, and approval processes depending on the license or permit type. We recommend that you have the same name for record types as license types.

1. From the management settings for the appropriate license application object, go to Record Types.
2. Click New.
3. To copy all available picklist values, or to choose an existing record type to clone its picklist values, choose Master from the Existing Record Type dropdown list.
4. Enter a Record Type Label that’s unique within the object.
5. Enter a name for the record type.
   The Record Type Name refers to the component when using the Web services API and prevents naming conflicts on package installation in managed packages.
6. Enter a description.
7. Activate the record type.
8. To make the record type available to users with that profile, select Enable for Profile next to a profile. To enable it for all profiles, select the check box in the header row.
9. To make it the default record type for users of that profile for enabled profiles, select Make Default. To make it the default for all profiles, select the checkbox in the header row.
10. Click Next.
11. To determine what page layout displays for records with this record type, choose a page layout option:
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.

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. To edit the values of the application statuses, categories, application tiers, and application types picklists available for the record type, click Save.

Configure Occupational Licenses

Individuals can apply for occupational licenses that require completion of a course or an examination. Create records for course offerings or examinations, so when an individual applies for a license from the site using these course or examination records, Training Course Participant and Person Examination records get created.

An individual can also apply for a license that is based on their education. When an individual applies for an education-based license on the site, Person Education record gets created.

Create a Training Course
Create the trainings that are authorized by a government authority that qualify a license or a permit.

Create a Training Course Offering
Create an instance of a training course with location and date details of the courses.

Create an Examination
Create examinations that are authorized by a government authority that qualify a license or permit.

Create a Training Course
Create the trainings that are authorized by a government authority that qualify a license or a permit.

1. From the App Launcher, find and open Training Courses, and then click New.
2. Enter a name and description for the course.
3. Select the Status as Active.
4. Enter the total credits and hours for the course.
5. Save your changes.

Create a Training Course Offering
Create an instance of a training course with location and date details of the courses.

1. From the App Launcher, find and open Course Offerings, and then click New.
2. Enter a name and description for the course.
3. Select a location.
4. Enter the start and end date and time for the course offering.
5. Select the Course Name for which you’re creating the instance.
6. Save your changes.
Create an Examination

Create examinations that’re authorized by a government authority that qualify a license or permit.

1. From the App Launcher, find and select Examinations, and then click New.
2. Enter a name and description for the examination.
3. Select the Status as Active.
4. Save your changes.

Configure Unified View of Government

Give your reviewers a consolidated view of a business’ applications, inspections, violations, and enforcement actions by adding the Hierarchical View component to the account record page. You can also add the component to the application, inspection, or a complaint page.

You can add this component to business license application, individual application, account, visit, and case pages. Here's how you can configure a Business License Application page.

1. From App Launcher, find and select Business License Application and click a record.
2. Click Edit Page.
3. Select the Tab component, and add a tab.
4. Enter a name for the tab. For example, Unified View of Business Application.
5. Select the tab, and drag the Hierarchical View component onto the page.
6. Select the object that comprises the first level of the hierarchy.
   
   Note: Only the objects that are associated with Business License Application objects appear in the list.

7. Select the objects that comprise the second levels of the hierarchy.
   
   Note: The objects that appear in the list depends on the selection of the first level.

8. (Optional) Select the objects that comprise the third and fourth level of the hierarchy.
   
   Tip: You can also use your custom object as one of the hierarchy levels.

9. Enter the number of records to display for the first three levels of the hierarchy.
10. Save your changes, and activate the page.

The hierarchical view of the selected objects is available as a new tab on the Business License Application record page. The fields and the order of the list depends on the related list configuration of Business License Application.
Configure Business Regulatory Authorization Type Dependencies

Business Regulatory Authorization Type Dependencies determine one permit’s dependency on another.

If you set up Business Regulatory Authorization Type Dependencies, when constituents check for a business type in the portal, they can view the complete list of permits required for a business type. They can also see the details of which permits can be applied directly and which ones depend on another.

Create a Dependency Record

By creating a permit dependency record, you can display the list of permits required for a business type and how they depend on each other.

View Permits for a Business Type

View the list of permits that are required for a business type. The list gives the details about which permit is the parent and which permits are dependent. For example, if the business type is salon, you can see all the permits required for salon and the dependency details.

Create a Dependency Record

By creating a permit dependency record, you can display the list of permits required for a business type and how they depend on each other.

1. From the App Launcher, find and open Business Regulatory Authorization Type Dependencies, and then click New.
2. Enter the name of the dependency record.
3. For Parent Business Regulatory Authorization Type, select a business regulatory authorization type that must be applied first.
   Tip: To search a business regulatory authorization type by name, add a custom formula field with the value `BusinessTypeIdentifier.Name & "," & RegAuthTypeIdentifier.Name`, and then go to Search Layout, edit the Default Layout, and then add the custom field in the Selected Fields.
4. For Dependent Business Regulatory Authorization Type, select a business regulatory authorization type that must be applied after getting the parent business regulatory authorization type.
5. Save your changes.

View Permits for a Business Type

View the list of permits that are required for a business type. The list gives the details about which permit is the parent and which permits are dependent. For example, if the business type is salon, you can see all the permits required for salon and the dependency details.

1. From the App Launcher, find and open Business Type.
2. Select the required business type.
3. Click the Permits tab.
   You can see the list of all the permits required for the selected business type.
Set Up License Application Approval Process

An automated approval process enables you to respond to approval requests directly from the home page, or through in-app and email notifications. You can also approve requests using the Salesforce App. If you can’t respond, transfer multiple approval requests to a colleague.

Enable Paths
Create paths that guide users and reviewers through the application statuses in a review process.

Set Up Entitlement Process for License Applications
Entitlement management lets you define and enforce application approval time targets.

Set Up Milestone Tracker for License Applications
Use milestone tracker to track application approval time targets.

Create Paths Along the Application Statuses in the Review Process
Create a path for each record type.

Create a License Application Queue for Reviewers
Use a License Application Queue for reviewers to manage their application review backlog.

Create an Approval Process for License Applications
Create an approval process that automates license application reviews and approvals.

Use Process Builder to Manage Approval Process
Use the Submit for Approval action in Process Builder to submit license applications through an approval process. You can also use process builder to automate visit creation when an application requires an inspection or update the application status based on inspection results.

Use Email Alerts to Update License Applicants
You can set up email alerts with Process Builder and send them to license applicants when their application status changes.

Manage Rejected Applications
Configure your Approval Process to allow approvers to reject applications if an application requires corrections from the applicants. They can use the Reject option in the Approval History component and provide the rejection reason. You can show the constituents their rejected applications in a separate component by adding a Field Update action in your Approval Process. This way the constituents immediately know what applications require action from their side.

Enable Paths
Create paths that guide users and reviewers through the application statuses in a review process.

To create a path, you must enable Path.

1. From Setup, use the Quick Find box to find and select Path Settings.
2. Click Enable.
Set Up Entitlement Process for License Applications

Entitlement management lets you define and enforce application approval time targets.
When a new application is submitted in sites, a case object gets created through Dataraptor. You
 can create an entitlement process using the case object. Before setting up a Milestone tracker, you
 must enable entitlements.
1. From Setup, use the Quick Find box to find and select Entitlement Processes.
2. Click New Entitlement Process.
3. For entitlement process type, select Case, and click Next.
4. Enter a name and description.
5. Select Active.
6. For Case, enter the process, select Based on case created date.
7. For Case exits the process, select Based on custom criteria.
8. For Field, select Case:Closed. For Operator, select Equals. For Values select True.
9. Save the entitlement process.

SEE ALSO:
Enable Entitlements

Set Up Milestone Tracker for License Applications

Use milestone tracker to track application approval time targets.
1. From Setup, use the Quick Find box to find and select Milestones under Entitlement
Management.
2. Click New Milestone.
3. Enter a name and description. Try to name milestones after license types, for example,
Establishment License Approval Time.
4. Select No Recurrence.
5. Click Save.
6. From Setup, use the Quick Find box to find and select Entitlement Processes.
7. Select an entitlement process.
8. Click New on the Milestones related list.
9. Choose the milestone.
10. In Time Trigger (Minutes), enter the number of minutes to issue.
12. Specify the order in which Salesforce processes the milestones.
13. For criteria, select Criteria are met.
14. For Field, select Case: Type. For Operator, select Equals. For Value, select the type of license you’re creating the milestone for.
15. Save your changes.
Drag the Milestone Tracker Lightning Web Component onto the case page to get a real-time countdown of time remaining to resolve the case.

Create Paths Along the Application Statuses in the Review Process

Create a path for each record type.

1. From Setup, use the Quick Find box to find and select 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 object that the path is based on. The object can be both Business License Application and Individual Application.
   d. Select a record type.
   e. Select Application Status.
   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.
   
   **Note:** You can also configure paths for the Regulatory Code Violation and the Public Complaint objects.

Create a License Application Queue for Reviewers

Use a License Application Queue for reviewers to manage their application review backlog.

1. From Setup, use the Quick Find box to find and select Queues.
2. Click New.
3. For Label, enter Application Reviewers.
4. Accept the unique name.
5. For Supported Objects, add the Business License Application object to the selected objects list.
6. For Queue Members, add Reviewer and Compliance Manager to the selected members list.
7. Save your changes.
Create an Approval Process for License Applications

Create an approval process that automates license application reviews and approvals.

You can configure Vlocity OmniScript to change a field in the Business License Application object and use that as the criteria for this approval process. For example, configure Vlocity OmniScript to change the Application Status field on the Business License Application object to Submitted when a user submits a license application on the Experience Cloud site. For more information, see Updating Salesforce Data from an OmniScript. Then, specify Status equals submitted as the criteria for the Approval Process.

1. From Setup, use Quick Find box to find and select Approval Processes.
2. For Manage Approval Processes For, select Business License Application or Individual Application.
4. For Name, enter the name of the approval process.
5. Accept the unique name.
6. In Specify Entry Criteria, select your record type or application status.
7. For Select Approver, select Automatically assign to queue and select the name of the reviewer queue.
8. Save your changes.
10. (Optional.) To add Inspection as an approval step to each application, complete the following steps.
   a. Click New Approval Step.
   b. For Name, 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 the Compliance Manager queue.
   h. Select Perform all rejection actions for this step AND all final rejection actions. (Final Rejection).
   i. Save your changes.
11. Repeat steps 6–10 to add more steps to your approval process.

SEE ALSO:
   Set Up an Approval Process
Use Process Builder to Manage Approval Process

Use the Submit for Approval action in Process Builder to submit license applications through an approval process. You can also use process builder to automate visit creation when an application requires an inspection or update the application status based on inspection results.

1. From Setup, use Quick Find box to find and 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 Business License Application, and select Business License Application.
6. Select when a record is created or edited.
7. Click Save.
8. Next, configure the process to submit each Regulatory Authorization Type to its corresponding Approval Process.
   a. Click Add Criteria.
   b. Enter a name for the criteria. Select Conditions are met.
   c. For Field, select License Type, and then click Choose.
d. For **Operator**, choose **Equals**. For **Type**, choose **ID**.

e. For **Value**, enter the ID of the Regulatory Authorization Type record you created. This object has the different types of licenses that you issue.

f. Click **Save**.

g. Click **Add Action**.

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

i. Enter a name for the action.

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

k. Click **Save**.

l. Repeat these steps for other Regulatory Authorization Type values.

9. Click **Activate**.

**SEE ALSO:**

Submit a Record for Approval from a Process

Use Email Alerts to Update License Applicants

You can set up email alerts with Process Builder and send them to license applicants when their application status changes.

Before you create a process, make sure that you created the necessary email templates for each status change.

1. From Setup, use the Quick Find box to find and 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 **Business License Application**, and select **Business License Application**.

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

7. Click **Save**.

8. Next, configure the process to send an email when the application status changes.

   a. Click **Add Criteria**.

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

   c. For **Field**, enter **Application Status**, select **Application Status**, and then click **Choose**.

   d. For **Operator**, choose **Is Changed**. For **Type**, select **Boolean**. For **Value**, select **True**.

   e. Click **Add Row**.

   f. For **Field**, enter **Application Status**, select **Application Status**, and then click **Choose**.

   g. For **Operator**, choose **Equals**. For **Type**, select **Picklist**.

   h. For **Value**, select the status for which you want to send an email alert.

   i. Click **Save**.
Click Add Action.

For Action Type, select Email Alerts.

Enter a name for the action.

For Email Alerts, enter the name of the Email Alert you created for this status.

Click Save.

Repeat these steps for other application status values.

Click Activate.

SEE ALSO:
Create an Email Template in Lightning Experience

Manage Rejected Applications

Configure your Approval Process to allow approvers to reject applications if an application requires corrections from the applicants. They can use the Reject option in the Approval History component and provide the rejection reason. You can show the constituents their rejected applications in a separate component by adding a Field Update action in your Approval Process. This way the constituents immediately know what applications require action from their side.

1. Open the approval process you created for the Business License Application object.
2. From the Final Rejection Actions list, click Add New | Field Update.
3. For Name, enter Set Returned Field.
4. Accept the unique name.
5. For Field to Update, select Returned to Applicant.
6. Choose True.
7. Save your changes.
8. Reset the field when the user resubmits their application.
   a. From the Initial Submission Actions list, click Add New.
   b. Choose Field Update.
   c. For Name, enter Reset Returned Field.
   d. Accept the unique name.
   e. For Field to Update, select Returned to Applicant.
   f. Choose False.
   g. Save your changes.
Intelligent Document Automation

Simplify the document management process to reduce manual data entry. And you can get constituent-submitted information such as business license applications, contact information, or other documents in one place from intake through processing. Route incoming documents automatically to the proper queue for faster review and approval.

Set Up Intelligent Document Automation

To store the data that you’re extracting from incoming documents, set up document types. You can set up different document types based on the kind of data you want to work with. For example, create a passport verification document type to use when defining the data extraction fields. You can assign permissions to users who process business applications, typically intake officers.

Create a Document Checklist Item

To encourage your constituents to provide the necessary documents, create document checklist items that help them manage file uploads and approvals.

Use Action Plan Templates

You can provide your users with templates to create action plans. An action plan helps improve your document workflow's consistency by helping your user to the proper selection of document checklist items.

Know Your Applicant’s Documents

Intelligent Document Automation centralizes all your document management tasks in one place. You can map incoming constituent information from their documents to a preconfigured application form to efficiently and accurately put it to work for them.

Upload Documents

You can upload required documents to their associated document checklist items. Site users can upload documents against their applications from the portal.

Use Document Data to Create an Application

You can choose the data you want to use in an application form by selecting the pages you need and discarding the rest. Pages already attached to an object and associated with a document checklist item are marked with a transformed icon.

Set Up Intelligent Document Automation

To store the data that you’re extracting from incoming documents, set up document types. You can set up different document types based on the kind of data you want to work with. For example, create a passport verification document type to use when defining the data extraction fields. You can assign permissions to users who process business applications, typically intake officers.

1. Turn on Document Checklist.
   From Setup, in the Quick Find box, enter Document Checklist Settings. Move the Checklist Items with Attachments slider to On.

2. Assign permissions and permission sets for application forms. To determine the users who can work with documents and forms, see Set Up Intelligent Document Automation Users.
   Assign the Document Checklist license to users or groups that work with these forms. For example, for business license applications, users typically are intake officers.
   a. From Setup, in the Quick Find box, enter Permission Sets, and then select Document Checklist.
   b. Click Manage Assignments, then click Add Assignments. Choose your users and click Assign.

3. Create a Document Type.
a. From Setup, in the Quick Find box, enter **Document Type**, and then select **New Document Type**. Give your document type a label and name, such as Business License Application, and save it.

b. Repeat the previous step to create different document types based on the kind of data you want to work with.

### Create a Document Checklist Item

To encourage your constituents to provide the necessary documents, create document checklist items that help them manage file uploads and approvals.

You can relate your document checklist items to Action Plan Templates and generate similar checklist items to create Action Plans for those templates.

For example, to create a document checklist item for a license application:

1. Open the business license application that you want to create a document checklist item for.
2. Under Related, in the Document Checklist Items section, click **New**.
3. Enter a name for the checklist item.
4. If your government agency uses document types, select the appropriate document type.
5. (Optional) Under File Pertains To, specify the contact or user related to the associated file.
6. Save your changes. To save and create another document checklist item, click **Save & New**.

### Use Action Plan Templates

You can provide your users with templates to create action plans. An action plan helps improve your document workflow’s consistency by helping your user to the proper selection of document checklist items.

You can read more about Action Plans and making them available to your users; see **Action Plans**.

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 Action Plan Type as **Industries** and the Target Object as **Lead**.
4. Save your changes.
5. On the newly created action plan template, click New Document Checklist Item and select a document type, such as Business License Application.

You can create more than one document checklist item. For example, your process requires a passport copy and contact information.

6. Review your document checklist items, and click **Publish Template**.

**Important:** You can’t change an action plan template after it’s published. To make changes, create a template and remove the published one.
Know Your Applicant’s Documents

Intelligent Document Automation centralizes all your document management tasks in one place. You can map incoming constituent information from their documents to a preconfigured application form to efficiently and accurately put it to work for them.

As an intake officer, every business license application that’s submitted contains a lot of information. Entering this information manually such as birth date, contact information among others can be a tedious and error-prone. By automating the document intake process, the applications submitted are processed faster for your applicants.

Upload Documents

You can upload required documents to their associated document checklist items. Site users can upload documents against their applications from the portal.

To choose the pages to extract data from, disable optical character recognition (OCR).

To disable OCR, find and open Received Documents. Enter your details for your received document and ensure you select Disable Auto OCR and Active.

Upload a File to the All Received Documents Queue

Use the Received Documents view to add submitted documents. The data from your uploaded documents is extracted automatically using optical character recognition (OCR) technology when Amazon Textract is enabled.

Upload a File to a Document Checklist Item

Upload a file to a document checklist item from its associated application record.

Upload a File from the Portal

Public Sector constituents can upload a required file to a document checklist item through the portal.

Upload a File to the All Received Documents Queue

Use the Received Documents view to add submitted documents. The data from your uploaded documents is extracted automatically using optical character recognition (OCR) technology when Amazon Textract is enabled.

1. From the App Launcher, find and select Received Documents.
2. Click Upload Documents and choose the file on your computer that you’d like to upload.
3. Open your file from the Received Documents list and give it a name and fill in other details. Your Salesforce admin can set up flows to automatically populate some of the data, such as the document number.

If Intelligent Form Reader is enabled, Salesforce extracts the data and stores it in your Salesforce database as an OCR Document Scanned Result (ODSR) record.
Upload a File to a Document Checklist Item

Upload a file to a document checklist item from its associated application record.

1. Choose the license application record with the document checklist item you want to upload a file to.

2. Under Document Checklist Items, click the arrow to the right of the document checklist item you want to upload a file to and select Upload File. Choose your file and click Open.

3. If you want to change the file associated with the document checklist item, select Upload New Version. If you want, you can enter what’s changed between the old version of the file and the new version and click Upload.

Note: When you upload a new file version to a document checklist item, only the document checklist item’s contents change, not the file’s name.

Upload a File from the Portal

Public Sector constituents can upload a required file to a document checklist item through the portal.

1. Under your profile picture, choose My Account.

2. From Document Checklist Items, click the arrow to the right of the document checklist item you want to upload a file to and select Upload File. Choose your file and click Open.

3. To change the file associated with the document checklist item, select Upload New Version. To enter what’s changed between the old and new version of the file, click Upload.

Note: When you upload a new file version to a document checklist item, the document checklist item’s contents change, but the file name doesn’t.

Use Document Data to Create an Application

You can choose the data you want to use in an application form by selecting the pages you need and discarding the rest. Pages already attached to an object and associated with a document checklist item are marked with a transformed icon.

You can be alerted to a newly uploaded document via a queue that your Salesforce admin set up, or to a document that you uploaded. Click the arrow to the right of the document and select Transform Document.
1. In the Transform Document screen, select the pages that contain the data you need. You can do transform a document in two ways:
   - Select Custom and specify the pages you want to include.
   - Select the checkbox below each page that you want to include.

2. To reorient your pages, click under the pages you want to fix.

3. Choose the document checklist items this document belongs to.

The document is now in the referral process queue. Depending on the triggers or flows set by your Salesforce admin, you can either move this document to the next step or start a new document.

Intelligent Form Reader

Intelligent Form Reader uses optical character recognition (OCR) technology to extract data from your constituents’ submitted documents automatically. Based on the kind of form you data is from, map the fields in the form to the fields in Public Sector Solutions.

For example, you can specify a business owner’s birth date in an application form to be stored in the Birthdate field in the business owner’s Contact record. So when you want to create or update record fields or verify data that you store, you can check the birthday on an application form against the birthdate on a scanned passport.

Intelligent document automation works with PDF, JPG, and PNG image files. The extracted data is mapped to the Salesforce objects that you define. An uploaded file can provide content for multiple received documents, but a received document can be associated with only one content document. If a user deletes a file from a Received Document list, you must also delete the associated OCR Document Scan Result record.

Enable Intelligent Form Reader

Intelligent Form reader provides optical character recognition for data extraction using Amazon Textract.

Map Form Types to Objects

Specify the data object where you want to store the information for each type of incoming form.

Set Up Data Extraction

Map the fields in the incoming form to equivalent fields in the appropriate Salesforce data object.
Enable Intelligent Form Reader

Intelligent Form reader provides optical character recognition for data extraction using Amazon Textract.

Before you enable Intelligent Form Reader:

- Learn more about Intelligent Form Reader on page 38.
- Assign permissions and create document types on page 34 that you require.

1. From Setup, find and select Intelligent Form Reader.
2. Move the Enable Intelligent Form Reader slider to On.

Map Form Types to Objects

Specify the data object where you want to store the information for each type of incoming form.

1. From Setup, in the Quick Find box, enter Intelligent Form Reader, and then select New Mapping.
2. Give your map form a name, such as Contact Mapping.
3. For Form Type, choose the data’s source document. For this example, try Contact Form. The values listed in the dropdown were previously created document types on page 34.
4. For Target Object, select the Salesforce object where the data is stored. For example, some data on a business license application that identifies the business owner, such as name and address, is stored in the Contact object.
Note: The list of objects that your users see in the Target Object dropdown is displayed according to their access level. Review the permissions assigned to your users to ensure that they see the required objects.

Set Up Data Extraction
Map the fields in the incoming form to equivalent fields in the appropriate Salesforce data object.

1. Create a mapping and then click Add Field.
2. For Form Fields, specify a kind of data in the incoming form, such as Date of Birth.
3. Under Target Object Fields, choose the Salesforce object field that matches the field in the incoming form. For example, if there’s a Date of Birth field in the incoming form, choose Birth Date in the Contact object.

Note: You can’t change a target object after it’s set.

4. After you add the fields that you need, save your work and click Activate.
**Manage Salesforce Sites**

Sites are a great way to share information and collaborate with constituents. In the site, constituents can look for license and permit requirements and information, apply for a license or permit, check their application, inspection, and violations status.

**Enable Salesforce Sites with Public Sector Solutions**

To create a site, you must enable sites first.

**Create a Custom Community User Profile**

Every Salesforce org includes standard profiles that you can assign to users. To help your user log in using an Experience Cloud site, create a community user profile.

**Set Up Sharing Settings**

Configure and set up your organization’s sharing settings. These settings specify the level of access your users have to each others’ data.

**Create an Experience Cloud Site with the Licenses and Permits Template**

Create an Experience Cloud site with the Licenses and Permits template.

**Create Person Accounts for Self-Registering Users of Your Site**

Allow site users login to Experience Cloud site to create person account for self-registering users.

**Use Pre-Configured Public Sector Solutions Lightning Components**

The Licenses and Permits sites theme includes pre-configured for tabs Public Sector Solutions.

**Use Tabs to Show Licenses, Applications, and Drafts Records**

Configure your site to give your constituents easy access to view records.

**Configure Salesforce Knowledge**

Build your Salesforce Knowledge base, and give your constituents the ultimate support tool.

**Configure Site Record Page**

To help your constituents easily identify the reason for approval or rejection of an application, configure the record pages in the site.

**Configure the Fee Payment History Page**

The Fee Payment History page shows all regulatory transaction fees associated with licenses and permits, inspections, and enforcement actions for a user’s business application. Your constituents can see pending fees and previously completed transactions from the portal.

---

**Note:** After you enable an site, you can’t disable it.

1. From Setup, use the Quick Find box to find and select Sites Settings.
2. Select Enable sites.
3. Select a domain name for your sites, and click Check Availability to make sure that it’s not already in use.

   You can’t change the domain name after you save it.
4. Save your changes.
Create a Custom Community User Profile

Every Salesforce org includes standard profiles that you can assign to users. To help your user log in using an Experience Cloud site, create a community user profile.

1. From Setup, in the Quick Find box, enter Users, and then select Profiles.
2. From the list, click Clone to clone the Customer Community Plus User profile. Provide a name, and save your changes. For example, clone and create a profile called LPI Community Plus User.
3. Click Edit.
4. Under the Administrative Permissions section, enable Manage Industries Visit.
5. Under the General User Permissions, select Grant community users access to LPI features and Run Flows.
6. Set object permissions based on your needs. The table lists all sample permissions.
   a. Standard Object Permissions

<table>
<thead>
<tr>
<th>Object</th>
<th>Access Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Addresses</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Assets</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Authorization Application Assets</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Authorization Application Places</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Business Licenses</td>
<td>Read</td>
</tr>
<tr>
<td>Business License Applications</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Business Profiles</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Business Regulatory Authorization Types</td>
<td>Read</td>
</tr>
<tr>
<td>Business Regulatory Authorization Type Dependencies</td>
<td>Read</td>
</tr>
<tr>
<td>Business Types</td>
<td>Read</td>
</tr>
<tr>
<td>Cases</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Contacts</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Course Offerings</td>
<td>Read</td>
</tr>
<tr>
<td>Examinations</td>
<td>Read</td>
</tr>
<tr>
<td>Individual Applications</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Inspection Types</td>
<td>Read</td>
</tr>
<tr>
<td>Locations</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Person Education</td>
<td>Read, Create, Edit</td>
</tr>
<tr>
<td>Person Examination</td>
<td>Read, Create, Edit</td>
</tr>
</tbody>
</table>
## Licensing and Permitting Management

**Object** | **Access Level**
--- | ---
Polygon | Read
Preliminary Application References | Read, Create, Edit, Delete
Public Complaints | Read, Create
Regulatory Authorities | Read
Regulatory Authorization Types | Read
Regulatory Codes | Read
Regulatory Code Violations | Read
Regulatory Transaction Fees | Read, Create
Regulatory Transaction Fee Items | Read, Create
Training Courses | Read
Training Course Participants | Read, Create, Edit
Violation Enforcement Actions | Read
Violation Types | Read
Visits | Read
Visited Parties | Read

### Custom Object Permissions

**Object** | **Access Level**
--- | ---
Saved OmniScripts | Read, Create, Edit
Vlocity API Metadata | Read
Vlocity Calculation Matrices | Read
Vlocity Calculation Matrix Columns | Read
Vlocity Calculation Matrix Dimensions | Read
Vlocity Calculation Matrix Rows | Read
Vlocity Calculation Matrix Versions | Read
Vlocity Calculation Procedures | Read
Vlocity Calculation Procedure Step | Read
Vlocity Calculation Procedure Variables | Read
Vlocity Calculation Procedure Versions | Read
Vlocity Cards | Read
7. Save your profile.

8. You can also set up field-level security for these entities. Field-level security can be set up for any entity.
   a. Open your newly created community user profile, and search for **Standard Field-Level Security**.
      For the Business License, Business Profile, and Person Education objects, click **View** to open and **Edit** the objects. Provide read or edit access to your chosen field, and then save your changes.
   
   b. You can also set **Custom Field-Level Security**. We recommend setting Read access for these object fields: Saved OmniScripts, Vlocity OmniScripts, Vlocity Omniscript Compiled Definition, and Vlocity OmniScript Element.

### Set Up Sharing Settings

Configure and set up your organization's sharing settings. These settings specify the level of access your users have to each others' data.

1. From Setup, in the Quick Find box, enter **Security**, and then select **Sharing Settings**.
2. To change your organization-wide default settings, click **Edit**.
3. The data listed in the table is a sample of the sharing settings that you can enable for your organization.

<table>
<thead>
<tr>
<th>Object</th>
<th>Default Internal Access</th>
<th>Default External Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account and Contact</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Asset</td>
<td>Controlled by Parent</td>
<td>Controlled by Parent</td>
</tr>
<tr>
<td>Case</td>
<td>Public Read, Write, Transfer</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>User</td>
<td>Public Read Only</td>
<td>Public Read Only</td>
</tr>
</tbody>
</table>

**Editions**

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

**User Permissions**

To create sharing settings:
- Manage Sharing
<table>
<thead>
<tr>
<th>Object</th>
<th>Default Internal Access</th>
<th>Default External Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity</td>
<td>Controlled by Parent</td>
<td></td>
</tr>
<tr>
<td>Action Plan</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Action Plan Template</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Assessment Indicator Definition</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Assessment Indicator Value</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Assessment Task</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Assessment Task Definition</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Authorization Application Asset</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Authorization Application Place</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Business License</td>
<td>Public Read Only</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Business License Application</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Business Regulatory Authorization Type</td>
<td>Public Read Only</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Dependency</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Type</td>
<td>Public Read Only</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Course Offering</td>
<td>Public Read Only</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Examination</td>
<td>Public Read Only</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Individual Application</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Inspection Type</td>
<td>Public Read Only</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Location</td>
<td>Public Read Only</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Person Education</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Person Examination</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Polygon</td>
<td>Public Read Only</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Preliminary Application Reference</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Public Complaint</td>
<td>Public Read, Write</td>
<td>Private</td>
</tr>
<tr>
<td>Regulatory Authority</td>
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<td>Regulatory Authorization Type</td>
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<td>Regulatory Code Violation</td>
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<td>Regulatory Transaction Fee</td>
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<tr>
<td>Training Course</td>
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<td>Violation Type</td>
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</tr>
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<td>Visit</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
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<tr>
<td>Object</td>
<td>Default Internal Access</td>
<td>Default External Access</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Saved OmniScript</td>
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<tr>
<td>Vlocity API Metadata</td>
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</tr>
<tr>
<td>Vlocity Calculation Matrix</td>
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<td>Public Read Only</td>
</tr>
<tr>
<td>Vlocity Calculation Procedure</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Vlocity Card</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Vlocity Datapack Object</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Vlocity DataRaptor Batch Queue</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Vlocity DataRaptor Bundle</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Vlocity DataRaptor Map Item</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Vlocity DataRaptor Object Interface</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Vlocity DataRaptor Staged Data</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Vlocity OmniScript</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Vlocity UI Layouts</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
</tr>
<tr>
<td>Vlocity UI Templates</td>
<td>Public Read, Write</td>
<td>Public Read Only</td>
</tr>
</tbody>
</table>

4. Save your changes.

Create an Experience Cloud Site with the Licenses and Permits Template

Create an Experience Cloud site with the Licenses and Permits template.

1. To create a site, from Setup, enter All in the Quick Find box, select All Sites, and then click New.
2. The site creation wizard opens with several templates for you to choose from. If you have Lightning Bolt solutions available in your Salesforce org, they are listed in the wizard.
3. Select the Licenses and Permits template. This template has pre-configured Lightning Components and Pages for licensing and permitting use cases.
4. Click Get Started.
5. Enter a site name.
6. For URL, enter the name of your site. This name is appended to the Experience Cloud site domain that you created when you enabled sites in this org. For example, if your site domain name is IllinoisGov.my.site.com and you're creating a site for licensing, you can enter licenses to create the unique URL IllinoisGov.my.site.com/licenses.
7. Click Create.

When you create a site, Salesforce supplies default pages for login, self-registration, change password, forgot password, and homepage. You can customize these default pages at any time in the Login & Registration page of the Administration workspace. The Licenses and Permits template supplies the following pages:
Create Person Accounts for Self-Registering Users of Your Site

Allow site users login to Experience Cloud site to create person account for self-registering users. 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.

SEE ALSO:
- Customize the Experience Cloud Site Self-Registration Process with Apex
- Create Experience Cloud Site Users

Use Pre-Configured Public Sector Solutions Lightning Components

The Licenses and Permits sites theme includes pre-configured for tabs Public Sector Solutions. To use a component, drag it onto a sites page.

View Inspection History
The View Inspection History component shows the inspections associated to the user or user’s business and the reason for the inspection. A user can also track the violations and enforcement actions from the same component.

View Permits
View the list of permits that are required for a business type. The list gives the details about which permit is the parent and which permits are dependent. For example, if the business type is salon, you can see all the permits required for salon and the dependency details.
View Inspection History

The View Inspection History component shows the inspections associated to the user or user’s business and the reason for the inspection. A user can also track the violations and enforcement actions from the same component.

View Permits

View the list of permits that are required for a business type. The list gives the details about which permit is the parent and which permits are dependent. For example, if the business type is salon, you can see all the permits required for salon and the dependency details.

Use Tabs to Show Licenses, Applications, and Drafts Records

Configure your site to give your constituents easy access to view records.

From the site builder, drag the Tabs component on to the page and give a name to your tab. You can then drag the Record List component on to the Tab component. Select an object to display the records of the object. Also, select a filter name. The options that appears in the Filter Name depends on the list you’ve created for the object.

Configure Salesforce Knowledge

Build your Salesforce Knowledge base, and give your constituents the ultimate support tool.

Create and manage a knowledge base written by experienced personnel or internal writers and share it with your constituents. Articles can include information on processes, licenses or permits, or frequently asked questions.

SEE ALSO:

Salesforce Knowledge
Configure Site Record Page

To help your constituents easily identify the reason for approval or rejection of an application, configure the record pages in the site.

1. In the site, select a business license application or an individual application record and then click Back to Builder.
2. Click the settings icon, click Advanced, and then select Show all components.
3. Drag the Related List - Single component on to the page.
4. From Related List, select Approval History.
   
   **Tip:** Configure the Approval History related list of Business License Application and Individual Application objects and make Comments the first field. This step ensures that the comments entered by the approver always show up under the Approval History section in the site.

5. Publish your changes.

Configure the Fee Payment History Page

The Fee Payment History page shows all regulatory transaction fees associated with licenses and permits, inspections, and enforcement actions for a user’s business application. Your constituents can see pending fees and previously completed transactions from the portal.

1. From Setup, select All Sites. Choose the site to be configured and click Builder.
2. From Settings, in Advanced, select Show all components.
3. Select a tab to add Fee Payment History as a new menu item.
4. Click Edit Default Navigation and select Add Menu Item.
5. From Name, enter Fee Payment History.
6. From the Type dropdown, select Site Page.
7. From the Page dropdown, select View Transaction History.
8. Drag the menu item to where you want it to appear on the site.
9. Save your menu item and publish your template.

Design Dynamic License Assessment and Application Forms

Users can assess their license needs and apply for the licenses that they need using forms that you design. You can make assessment and application forms available on Salesforce site using Omniscript Lightning Web Components.

Design a dynamic form using Vlocity Omniscript to populate form elements based on the user’s response. For example, the response to the first question in the first step can populate one of three form elements in the next step. Dynamic forms can be useful when performing a license needs assessment using a pre-screening questionnaire with dynamic form elements.

Assign License to Guest Users

To allow your guest users to use OmniScript forms in the site, assign Vlocity license to them.
Auto-Assign Vlocity Licenses to Site Users
Site users must have access to the OmniScript pre-screen and application forms. To reduce administrative overhead, configure a flow and a process to automatically assign a Vlocity license to a user based on selected criteria. We recommend this approach when you license a large number of users regularly.

Create Dynamic Forms Using Vlocity Omniscript
Use Vlocity Omniscript Designer to create a multi-step form. Configure the script so that it uses the response from one step to dynamically populate for elements in another step. For example, for users who choose corporation as their business structure, you can add a form input about the type of corporation.

Add OmniScript to a Salesforce Site Page
Add the OmniScript component to use OmniScript’s dynamic forms feature to assess licensing needs or fill out an application.

Handle Files and Images Uploaded to an OmniScript
You can let users upload files and images to an OmniScript form. Files and images can be mapped from OmniScript to a Salesforce object. An example is when a user wants to add an identity proof file to an application.

Post OmniScript Values to a Salesforce Object
Use the DataRaptor Post Action to write the OmniScript Form data to one or more Salesforce objects. Configure a new DataRaptor to update the relevant Salesforce objects. For example, map data to the license application object.

Save OmniScript as a PDF to a Salesforce Object
Use the Vlocity OmniScript PDF action to attach the OmniScript elements of a license application to the Business License Application or the Individual Application Salesforce object as a PDF. Your reviewers can use this PDF while reviewing the application.

Configure Save for Later Function
Configure the Save for Later function for OmniScript forms, and add the forms to the site to allow your constituents to save their applications and access it later. Constituents can also edit their submitted applications.

Pre-Fill Business Profile Fields for License Applications
Pre-fill business profile fields from the user’s Business Profile record for license applications. For first-time applicants, create an account and associated business profile to store business information.

Set Up the Regulatory Fees Using Vlocity Integration Procedure
Use the Vlocity Integration Procedure to set up regulatory fees to calculate the fee amount associated with an inspection or a violation.

Assign License to Guest Users
To allow your guest users to use OmniScript forms in the site, assign Vlocity license to them.

1. Go to site builder and then from settings click Guest User Profiles.
2. Select Public can access the site.
3. Click View Users.
4. Click the username.
5. Under Manage Packages click Assign Licenses.
6. Select the Vlocity license and click Add.
7. Provide access to the required objects.
   a. From settings click Guest User Profiles and then click Edit.
   b. Under Custom Object Permissions, select Read, Create, and Edit access to these objects.
      • Saved OmniScript
      • Vlocity Omniscripts
• Vlocity OmniScript Compiled Definitions
• Vlocity OmniScript Elements

  c. Save your changes.

8. Assign field-level security for these objects.
   a. Under Field-Level Security, click View for one of the objects you gave permissions for.
   b. Click Edit and select Read Access and if necessary, Edit Access.
   c. Click Back to Profile and repeat it for the other three objects.

Auto-Assigned Vlocity Licenses to Site Users
Site users must have access to the OmniScript pre-screen and application forms. To reduce administrative overhead, configure a flow and a process to automatically assign a Vlocity license to a user based on selected criteria. We recommend this approach when you license a large number of users regularly.

1. Build the Vlocity license ID flow.
2. To trigger the license ID flow, create a process.

   Build the Vlocity License ID Flow
   Configure a flow and configure the license ID to automatically assign Vlocity licenses to a user.

   Create a Process to Trigger the License ID Flow
   Use Process Builder to trigger the flow to auto-assign License ID to users.

Build the Vlocity License ID Flow
Configure a flow and configure the license ID to automatically assign Vlocity licenses to a user.

1. From Setup, use the Quick Find box to find and select Process Automation, and then click Flows.
2. Click New Flow, select Autolaunched Flow, and then click Create.
3. Create two text variables. Create VarT_PackageLicenseId to store the 18-character Globally Unique ID that identifies the package license. And then create VarT_UserId to store the user ID in which you pass the value through Process Builder.
4. Specify the following parameters:
   Variable 1:
   • Unique Name: VarT_PackageLicenseId
   • Data Type: Text
   • Available Outside the Flow: None
   • Default Value: {!$GlobalConstant.EmptyString}
   Variable 2:
   • Unique Name: VarT_UserId
   • Data Type: Text
   • Available Outside the Flow: Available for input
5. Drag the Get Record element onto the canvas, enter the name Vlocity Installed Package License ID, and map the fields according to these details:
   - Name: Vlocity Installed Package License Id
   - Look Up (Object): PackageLicense
   - Field: NamespacePrefix EQUALS vlocity_ins

6. Drag the Assignments element onto the canvas, enter the name Assign Vlocity License ID, and enter these values for the parameters:
   - Name: Assign Vlocity License ID
   - Variable: VarT_PackageLicenseId
   - Operator: Equals
   - Value: Vlocity Installed Package License Id.Id

7. Connect Record Lookup Vlocity Installed Package License ID to Assign Vlocity License ID.

8. Drag the Record Create element onto the canvas, enter the name Assign Package license to new user, and map the fields to the following parameters:
   - Name: Assign Package license to new user
   - Create (Object): UserPackageLicense
   - Field: PackageLicenseId {!VarT_PackageLicenseId}
   - Field: UserId {!VarT_UserId}

9. Connect Assign Vlocity License ID, to Assign Package license to the new user.
10. Activate this flow.

**Create a Process to Trigger the License ID Flow**

Use Process Builder to trigger the flow to auto-assign License ID to users.

1. In the User object, create a custom field ProfileText__c with Formula(Text) data type and the value as Profile Name.

2. From Setup, use the Quick Find box to find and select Process Builder, and then click New.

3. Enter a name, and save.

4. Add entry criteria.
   a. Click Add Object.
   b. Select User object.
   c. For the entry criteria, select only when a record is created.

5. To check if the user is a site user, enter Criteria as Is Site User.
   Enter the following values under Set Conditions:
   - Field: {User}.ProfileText__c
   - Operator: Contains
   - Type: String
   - Value: Enter the custom user profile that you created for site users.
6. Click **Set Schedule**, available under **Scheduled Actions**. Set a time for scheduled actions as **0 Hours After [User].CreatedDate**.

7. Trigger the flow you created. Enter an **Action Name**.

   Under **Set Flow Variables**, enter these parameters:
   - Flow Variable: VarT_UserId
   - Type: Field Reference
   - Value: [User].Id

8. Save your changes, and activate your process.

Create Dynamic Forms Using Vlocity Omniscript

Use Vlocity Omniscript Designer to create a multi-step form. Configure the script so that it uses the response from one step to dynamically populate for elements in another step. For example, for users who choose corporation as their business structure, you can add a form input about the type of corporation.

Here’s an example on how to create an OmniScript form.

1. From the App Launcher, find and select **Vlocity OmniScript Designer** and then click **New**.
2. Drag a radio element on to the OmniScript structure and enter the element name as **BusinessLegalStructure**. For Field Label, enter **What will be your business's legal structure?** For Options, enter value **Corporation** with label **Corporation**, value **NoProfit** with label **Not for Profit**, value **Partnership** with label **Partnership**, and value **Unknown** with label **I don’t know**.

3. Drag a formula input on to the OmniScript structure and enter the element name as **exprShowBusinessLegalStructureCorporationType**. For Expression, enter `CONTAINS(%BusinessLegalStructure%, "Corporation")`.
4. Drag a radio element on to the OmniScript structure and enter the element name as `BusinessLegalStructureCorporationType`. For Conditional view, choose `Hide element if false`, and add the condition `exprShowBusinessLegalStructureCorporationType` is equal to `true`.

5. To see how your new form looks, click `Preview`.

SEE ALSO:
- Getting Started with OmniScript
- Creating the Script Logic
- OmniScript Element Definitions

Add OmniScript to a Salesforce Site Page

Add the OmniScript component to use OmniScript’s dynamic forms feature to assess licensing needs or fill out an application.

1. From Setup, use the Quick Find box to find and select `Sites`, and then click `All Sites`.
2. Click `Builder` for your site.
3. Click `Component`, and find and search `Vlocity Omniscript`.
4. Drag the `Vlocity Omniscript` component onto the page.
5. Select `Type`, `SubType`, and `Language fields`.
   The available values for these fields depend on the page you added the OmniScript component.

SEE ALSO:
- Launching OmniScript from a Community or Lightning Record Page
- Import Process Library

Handle Files and Images Uploaded to an OmniScript

You can let users upload files and images to an OmniScript form. Files and images can be mapped from OmniScript to a Salesforce object. An example is when a user wants to add an identity proof file to an application.

1. Add a file component to the OmniScript designer.
2. Configure a DataRaptor to handle the title and the body of the file, and link it to the license application.

SEE ALSO:
- Uploading Files and Images in OmniScript
- Mapping File Attachments From an OmniScript to Salesforce
Post OmniScript Values to a Salesforce Object

Use the DataRaptor Post Action to write the OmniScript Form data to one or more Salesforce objects. Configure a new DataRaptor to update the relevant Salesforce objects. For example, map data to the license application object.

SEE ALSO:
- DataRaptor Post Action
- DataRaptor Load Overview

Save OmniScript as a PDF to a Salesforce Object

Use the Vlocity OmniScript PDF action to attach the OmniScript elements of a license application to the Business License Application or the Individual Application Salesforce object as a PDF. Your reviewers can use this PDF while reviewing the application.

Important: To use this feature, ensure that you don’t use the Lighting Web Component for OmniScripts.

SEE ALSO:
- Adding a PDF Action to the OmniScript

Configure Save for Later Function

Configure the Save for Later function for OmniScript forms, and add the forms to the site to allow your constituents to save their applications and access it later. Constituents can also edit their submitted applications.

Enable Save for Later Function in OmniScript Forms
Enable the Save for Later function from the Script Configuration.

1. Select an OmniScript form from the OmniScript Designer.
2. In the Script Configuration, under Save Options, select Allow Save for Later.
3. In the Field API Name, enter CommunityResumeLink__c.
4. Check the Resume Application Visualforce page.
   Note: This page is available only if you’re using a trial org.
5. Under Custom HTML Templates, replace the domain with your domain in the code snippet.
6. Save your changes.
Add this OmniScript form to the site.

SEE ALSO:
- Configuring an OmniScript for Save and Resume
- DataRaptor Post Action

Add Save for Later Enabled OmniScript Form to Site
The Save For Later option enabled to the site allows your constituents to save their application. This option gives them the ability to go back to it later without losing the information that they already filled in.

Create a OmniScript form with the Save For Later option enabled.
1. Go to Sites Builder.
2. Click Home, and then click New Page.
4. Enter a name for the page, and click Create.
5. From the component list, drag the Visualforce Page component onto the page.
6. In the Visualforce Page Name, select Resume Application.
7. Publish your page.

Pre-Fill Business Profile Fields for License Applications
Pre-fill business profile fields from the user's Business Profile record for license applications. For first-time applicants, create an account and associated business profile to store business information.
1. To determine if a license applicant is a first-time applicant or not, add a radio form input.
2. If the license applicant is not a first-time applicant, add a DataRaptor Extract action and populate application fields related to Business Profile.

SEE ALSO:
- Creating the Script Logic
- Using Formulas in DataRaptors
- DataRaptor Post Action
- DataRaptor Extract Overview
Set Up the Regulatory Fees Using Vlocity Integration Procedure

Use the Vlocity Integration Procedure to set up regulatory fees to calculate the fee amount associated with an inspection or a violation.

**Create a Regulatory Transaction Fee Using a Salesforce Flow**

To create a regulatory transaction fee from a violation enforcement action or a visit, configure a Salesforce flow. For example, when a violation enforcement action associated with a civil penalty is created, a Salesforce flow is triggered that calls an invocable Apex class. This Apex class calls out the Integration Procedure, which then calls a Data Raptor that calculates a violation. The violation count and the violation type are entered as input parameters into the calculation matrix, which calculates the violation or penalty fees.

**Create a Regulatory Transaction Fee from the Application Record Page**

As a compliance officer, you can create regulatory transaction fees for business license applications, individual applications, inspections, or enforcement actions. You can create these regulatory fees from the application records page.

**Create a Regulatory Transaction Fee Item and Associate it to a Regulatory Transaction Fee**

Break your regulatory transaction fee into multiple line items with individual amounts. Line items can include an application fee, additional fee, or inspection fee. When your user applies for a license, information such as the authorization category, the authorization type, or seating capacity is used to calculate the application fee line items.

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**Create a Regulatory Transaction Fee from the Application Record Page**

As a compliance officer, you can create regulatory transaction fees for business license applications, individual applications, inspections, or enforcement actions. You can create these regulatory fees from the application records page.

1. From App Launcher, go to Vlocity Integration Procedure and click **New**.
2. Configure your Integration Procedure with a corresponding calculation procedure for each regulatory transaction fee item.

**Create a Regulatory Transaction Fee from the Application Record Page**

As a compliance officer, you can create regulatory transaction fees for business license applications, individual applications, inspections, or enforcement actions. You can create these regulatory fees from the application records page.

1. On the license application record, click to open the Regulatory Transaction Fee’s related list, click **New**.
2. Select the parent record to attach your regulatory transaction fee to.
3. Select an account.
4. Select the status of the fee.
5. Provide comments if you want to explain the context of the fee.
6. Set a Date and Time from when the transaction fee is applicable.
7. Set a Date and Time for when you expect the fee to be paid.
8. Save your changes.

Create a Regulatory Transaction Fee Item and Associate it to a Regulatory Transaction Fee

Break your regulatory transaction fee into multiple line items with individual amounts. Line items can include an application fee, additional fee, or inspection fee. When your user applies for a license, information such as the authorization category, the authorization type, or seating capacity is used to calculate the application fee line items.

1. Create a new regulatory transaction fee record from the license application record page. You can also choose an existing regulatory transaction fee record from the license application record.
2. From the Regulatory Transaction Fee Items related list, click New.
3. Name your regulatory transaction fee item.
4. Enter the fee amount.
5. Provide comments if you want to describe the fee item.
6. Save your changes.

Inspection Management

Inspection Management makes managing inspections easy. You can create assessment indicators, create visits, and dynamic inspection results. You can also create violation types and enforcement actions.

Configure Inspections
Configure inspections to help field inspectors check regulatory codes, record observations, capture notes, take images, take signature, and create violation records, all from a mobile device.

Configure Inspections
Configure inspections to help field inspectors check regulatory codes, record observations, capture notes, take images, take signature, and create violation records, all from a mobile device.

You can bulk import data using Data Loader. When importing data, Data Loader reads, extracts, and loads data from comma-separated values (CSV) files or from a database connection. When exporting data, it outputs CSV files.

Assign Inspections Permission Set Licenses
Permission set licenses enable users to access features beyond the features included in their basic user licenses.

Set Up Inspections
Set up inspections to help field inspectors record their observations for assessment indicators. They can also check regulatory codes on their mobile devices. By mapping assessment indicator results with violations, you can manage violations and enforcement actions.
Create a Regulatory Code
Regulatory codes are standards defined by regulatory bodies. An example is Title Chapter 10, Division 3, Article 10.7397 of California State Board of Barbering and Cosmetology Act and Regulations. It states that every licensee displays the license in a conspicuous place in the place of business or place of employment.

Create an Assessment Indicator Definition
To define parameters for inspectors during an inspection, create assessment indicator definition records. For example, define the parameters for an inspection of how a salon displays its cosmetology license.

Create a Single-Select or Multi-Select Assessment Indicator Definition
Multi-select assessment indicator definition enables inspectors to capture multiple options for one regulatory standard parameter. For example, inspectors can use the multi-select assessment indicator definition to create a list of all the prohibited chemicals in a public restroom.

Create a Dynamic Assessment Result
Create a picklist for an assessment result, and configure it so that the picklist value can result in a new violation record. For example, an inspector can select a value from the picklist you create as an assessment result. Depending on the selected value, a violation record is created. For example, you can create Fail as an assessment result and mark it as a violation.

Create an Assessment Task Definition
Group several assessment indicator definitions into assessment tasks. To indicate the category of the task, use the task type. For example, you can group all assessment indicator definitions related to fire safety into the fire safety check task.

Create a Violation Type
Create violation type records for different violations recorded during inspections. For example, a violation type can be health or safety violation.

Configure Signature Task
Add a record signature task to a visit to allow an inspector to capture a signature after an inspection is completed.

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 inspections. For example, you could have an action plan template for each inspection type, such as fire inspection.

Associate Assessment Tasks and Signature Tasks to an Action Plan Template
Add the list of activities that are performed together in an inspection to an action plan template. You can add assessment tasks and signature tasks to one action plan template.

Publish a Template
To use an action plan template to create visits, publish a template. Ensure that you added the required tasks before you publish a template because you can’t add tasks to published templates.

Create an Inspection Type
Create inspection type records for different types of inspections required to issue license and permits. Fire Inspection is an example of inspection type that you can create.

Create a Violation Enforcement Action
Create violation enforcement action records to track enforcement actions related to a violation. For example, if a salon doesn’t display its cosmetology license, the enforcement action could be a fine of $100.

Create a Visit
As a compliance officer, you can create visits directly from the license application record or public complaint record if these objects are added to the Visit related list. You can also create visits from the Visit object page.
Create Quick Action to Auto Populate Visits
Add the Create New Visit button to the Business License Application or Individual Application page so that you can create a visit for inspection.

Associate an Action Plan Template to a Visit
Associate an inspection to an action plan template that includes the tasks the inspectors must perform during the inspection.

SEE ALSO:
Data Loader

Assign Inspections Permission Set Licenses
Permission set licenses enable users to access features beyond the features included in their basic user licenses.

1. In Setup, use the Quick Find box to find and select Users, and then select the users who you want to assign 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.

<table>
<thead>
<tr>
<th>Permission Set License</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Sector Field Access</td>
<td>Enables full user access to all inspection-related objects and features and read-only access to other objects.</td>
</tr>
<tr>
<td>ActionPlans</td>
<td>Provides users with access to Action Plans so that they can create action plan templates and assign tasks related to service requests.</td>
</tr>
<tr>
<td>IndustriesVisit</td>
<td>Provides access to objects and features of Industries Visit.</td>
</tr>
</tbody>
</table>

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.
Set Up Inspections

Set up inspections to help field inspectors record their observations for assessment indicators. They can also check regulatory codes on their mobile devices. By mapping assessment indicator results with violations, you can manage violations and enforcement actions.

1. Create Regulatory Code records to store regulatory codes enforced by your department.
2. Create Violation Type records for the different types of violations on regulatory codes.
3. Create Assessment Indicator Definition records for each of the regulatory codes. Associate the Assessment Indicator Definition records with Regulatory Codes and Violation Type records.
4. Group Assessment Indicator Definition records into one task in the Assessment Task Definition record.
5. Create an Action Plan Template record to hold several Assessment Task Definition and Signature Task records.
6. Assign an Action Plan Template record to an Inspection using the Visit record.
7. Regulatory Code Violation records are automatically created when the inspector notes a violation during a visit.
8. Add penalties and other redressal actions for a violation using the Enforcement Action record. Associate the record with a violation using the Violation Enforcement Action record.

Create a Regulatory Code

Regulatory codes are standards defined by regulatory bodies. An example is Title Chapter 10, Division 3, Article 10.7397 of California State Board of Barbering and Cosmetology Act and Regulations. It states that every licensee displays the license in a conspicuous place in the place of business or place of employment.

1. From the App Launcher, find and open Regulatory Codes, and then click New.
2. Enter a name, subject, and description for the regulatory code.
3. To identify the regulatory code as a title, chapter, or section, select a code type.
4. For Effective From, choose the date from which the code was effective.
5. For Effective To, choose the date until when the code is effective.
6. To link the code to a title or chapter, select a parent code.
7. Select a regulatory authority.
8. Save your changes.

Create an Assessment Indicator Definition

To define parameters for inspectors during an inspection, create assessment indicator definition records. For example, define the parameters for an inspection of how a salon displays its cosmetology license.

1. From the App Launcher, find and select Assessment Indicator Definition, and then click New.
2. Enter a name and description for the assessment indicator definition.
3. For Indicator Field Type, select a data type. The inspection assessment responses can be recorded in boolean, text, date and time, percentage, number, and decimal format.
4. Save your changes.

Create a Single-Select or Multi-Select Assessment Indicator Definition

Multi-select assessment indicator definition enables inspectors to capture multiple options for one regulatory standard parameter. For example, inspectors can use the multi-select assessment indicator definition to create a list of all the prohibited chemicals in a public restroom.

1. From the App Launcher, search and open Assessment Indicator Definitions, and then click New.
2. Enter the name and description for the indicator.
3. Select the indicator field type as Multi-Select Picklist.
4. On the Assessment Indicator Defined Value related list, click New.
5. Enter the sequence number and value for the assessment indicator.

**Note:**
- You can’t reuse a sequence number or an indicator value.
- You can’t use zero or negative integers as the sequence number.

6. Save the changes.

Create a Dynamic Assessment Result

Create a picklist for an assessment result, and configure it so that the picklist value can result in a new violation record. For example, an inspector can select a value from the picklist you create as an assessment result. And depending on the selected value, a violation record is created. For example, you can create Fail as an assessment result and mark it as a violation.

1. From Setup, go to Object Manager.
2. In the Quick Find box, enter Inspection Assessment Indicator.
3. Click Field and Relationships, and then click Results.
5. Enter a value for the picklist, and save your changes.

6. Click Edit, and select Violations if this value must create a violation record.

7. Make the value a default value, if necessary.

8. Save your changes.

Create an Assessment Task Definition

Group several assessment indicator definitions into assessment tasks. To indicate the category of the task, use the task type. For example, you can group all assessment indicator definitions related to fire safety into the fire safety check task.

1. From the App Launcher, find and select Assessment Task Definitions.

2. Click New. Enter a name, and choose a task type for the task definition.

3. Save your changes.

4. Click Add on the Assessment Indicator Definition related list.

5. Select the assessment indicator definitions applicable.

6. To set the task sequence, enter a number to set the Display Order.

7. Save your changes.

Create a Violation Type

Create violation type records for different violations recorded during inspections. For example, a violation type can be health or safety violation.

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

2. Enter a name for the license or permit.

3. Choose a type. To add more values to this picklist, see Add or Edit Picklist Values.

4. Choose a severity.

Note: If you don’t choose a number for a specific task and specify an order for the rest of your tasks, this task is considered the first task to complete during a visit.

7. Save your changes.
5. Save your changes.

SEE ALSO:
Add or Edit Picklist Values

Configure Signature Task
Add a record signature task to a visit to allow an inspector to capture a signature after an inspection is completed.

Add Signature Task Component to a Record Page
If a Signature Task is added to a Visit, the Record Signature component allows inspectors to record a signature after a visit is completed.

Add Signature Task Component to a Record Page
If a Signature Task is added to a Visit, the Record Signature component allows inspectors to record a signature after a visit is completed.

1. From Setup, use the Quick Find box to find and select Lightning App Builder.
2. Select a record Page, and click Next.
3. Drag the Record Signature component onto the page.
4. Click the component to:
   • Add the acknowledgment text.
   • Select the attributes to display.
5. Save your changes.

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 inspections. For example, you could have an action plan template for each inspection type, such as fire inspection.

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. Save your changes.
Associate Assessment Tasks and Signature Tasks to an Action Plan Template

Add the list of activities that are performed together in an inspection to an action plan template. You can add assessment tasks and signature tasks to one action plan template.

**Associate Assessment Task Definitions to an Action Plan Template**

Add the assessment task definitions to be performed for similar visits to an action plan template. Then use the template to create multiple visits. For example, in the restaurant license action plan, you can add fire safety and hygiene safety checks.

**Associate Signature Tasks to an Action Plan Template**

Add Signature Tasks to an action plan template if you want inspectors to capture signatures after completing an inspection.

**Associate Assessment Task Definitions to an Action Plan Template**

Add the assessment task definitions to be performed for similar visits to an action plan template. Then use the template to create multiple visits. For example, in the restaurant license action plan, you can add fire safety and hygiene safety checks.

1. From the App Launcher, select **Action Plan Templates**.
2. On your newly created action plan template, click **Add Assessment Task Definition**.
   - **Note**: You cannot add a assessment task definition on a published action plan template. You can either clone an existing action plan template and add an assessment task definition or create a new action plan template, and then, add a assessment task definition.
3. Select an assessment task definition.
4. To define the task sequence, enter a number to set the display order.
   - **Note**: The task without a display order number is considered the first task when you specify a sequence for the other tasks.
5. To make the task mandatory, select **Is Required**.
6. Save your changes.

**Associate Signature Tasks to an Action Plan Template**

Add Signature Tasks to an action plan template if you want inspectors to capture signatures after completing an inspection.

1. From the App Launcher, find and open **Action Plan Templates**.
2. Select the required template.
3. Click **Add Signature Tasks**.
4. Select a signature task.
5. If you want to make the task mandatory, select **Required**.
6. Save your changes.
Publish a Template

To use an action plan template to create visits, publish a template. 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 the **Action Plan Templates** item.
2. Select the required template.
3. Review the tasks that you added to the template, and click **Publish Template**.

Create an Inspection Type

Create inspection type records for different types of inspections required to issue license and permits. Fire Inspection is an example of inspection type that you can create.

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. Save your changes.

Create a Violation Enforcement Action

Create violation enforcement action records to track enforcement actions related to a violation. For example, if a salon doesn’t display its cosmetology license, the enforcement action could be a fine of $100.

1. From the App Launcher, find and open **Violation Enforcement Action**, and then click **New**.
2. For **Date Created**, select the date that the enforcement action was created.
3. For **Type**, select an enforcement action type.
4. Select a violation.
5. Save your changes.

Create a Visit

As a compliance officer, you can create visits directly from the license application record or public complaint record if these objects are added to the Visit related list. You can also create visits from the Visit object page.

1. Navigate to the license application record related to the inspection.
2. From the Visit related list, click **New**.
3. Select the location or address that you want your inspector to visit.
4. Set a **Visit Priority**.
5. Select an account.
6. Select the context of the visit. The context can be an application or a complaint.
7. In **Visit Type**, select an inspection type.
8. From the App Launcher, select Calendar. From the Other Calendars list, choose the inspector’s calendar you’d like to check for availability before assigning a visit.

9. Choose a Date and Time for when you expect the visit to start. The actual start time can vary based on the run time activity of the inspector.

10. Choose a Date and Time for when you expect the visit to end. The actual end time can vary based on the run time activity of the inspector.

11. Provide any Special Instructions to the inspector.

12. For Visitor, select People and then select the name of the inspector that you want to assign for this visit.

13. Save your changes.

Create Quick Action to Auto Populate Visits

Add the Create New Visit button to the Business License Application or Individual Application page so that you can create a visit for inspection.

1. In Setup, go to the Object Manager, and select Business Licence Application or Individual Application.

   a. For Action Type, select Create Record.
   b. For Target Object, select Visit.
   c. For Label, provide the label the user sees, such as New Inspection.
   d. For Name, type Create Visit.

3. Save your changes.

Associate an Action Plan Template to a Visit

Associate an inspection to an action plan template that includes the tasks the inspectors must perform during the inspection.

1. From the App Launcher, find and open Visits.

2. Select the required visit.


4. Enter a name for the action plan.

5. Search for and add the action plan template that you want to assign to the visit.
   
   Note: You can assign only published templates.

6. Click Next.

7. Review the tasks that are associated with the template, and select the tasks that you want to add to the inspection.

8. Save your changes.
   
   Inspection assessment indicator records are created for this inspection.
Emergency Response Management

Quickly deploy a single digital destination for constituents and sites to access emergency program information and incident updates.

Use the Emergency Response site to feature the different services and programs 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 Inspection App field, responders can deliver emergency services efficiently. Businesses can use the Experience Cloud 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.

SEE ALSO:
Emergency Response Management for Public Sector

Business Rules Engine

Configure Business Rules Engine to allow your users to automate complex policy decisions and efficiently determine constituents’ program eligibility.

Available in: Lightning Experience
Available in: Enterprise, Performance, Unlimited, and Developer Editions

Business Rules Engine comprises a suite of services, components, and objects that perform calculations and automate policy decisions. Business Rules Engine lets you quickly and easily determine whether applicants qualify for unemployment insurance, small business loans, or business licenses, and other public sector programs and services.

The key elements of Business Rules Engine are expression sets and decision matrices.

Expression sets perform a series of calculations using matrix lookups and user-defined variables and constants. Specifically, expression sets call decision matrices, which are tables that allow you to implement complex rules in a systematic, readable way. Decision matrices match input values to a table row and return the row’s output values.

What does that look like for your users? When you’ve configured expression sets and decision matrices, an agent can answer a series of questions, and the Business Rules Engine aggregates data from various sources and provides customized quotes or eligibility determinations. In addition, it’s easy to change conditions in the matrices so that your agencies and departments can keep pace with ever-changing rules and policies.

To set up a Business Rules Engine in your org, build your expression sets and decision matrices in the Business Rules Engine app. Click the App Launcher ( ) and search for and then select Business Rules Engine.

Creating an expression set involves creating and configuring the expression set version, defining the set’s variables and constants, and then creating the steps, or flow, of the set. After the set is created, test and activate it. For detailed instructions on how to set up an expression set, see Workflow for Creating an Expression Set.

There are several ways to create a decision matrix, depending on the type of matrix and level of complexity you need. For all of the options and detailed instructions, see Decision Matrices.
Decision Explainer
Give application reviewers insights into eligibility determinations and benefit calculations, and share the reasoning behind application decisions with constituents.

Available in: Lightning Experience
Available in: Enterprise, Performance, Unlimited, and Developer Editions

Decision Explainer is a collection of setup objects that provide insight into why a business rule generated a specific result. Say, for example, a constituent applies for a special permit to open a salon at their residence. They're thrilled when they're granted the permit, but they notice that they were charged more than the fee documented on the city's permitting website, so they call to ask why. By using Decision Explainer, the application reviewer can see the application's history, the expression set that was used to evaluate it, and tell the constituent why they were charged an additional fee. Application reviewers can also use Decision Explainer to ensure compliance, detect fraud, and provide equitable distribution of benefits.

Use Decision Explainer to understand the expression sets in Business Rules Engine calculations for:
- Individual and business application fees
- Unemployment benefits
- Education loan eligibility checks

These Decision Explainer objects store and locate the metadata associated with every business rule.

- **Application Subtype Definition.** Defines the type of application, such as a licensing application or a permit application.
- **Business Process Type Definition.** Defines the business process that is applied for the rule, such as approving an application for an individual or for a business.
- **Explainability Action Definition.** Generates and stores metadata about the business rule.
- **Explainability Action Version.** Stores the different versions of the rule. One explainability action definition can have multiple explainability action versions.

To set up Decision Explainer, create the records for each object and business rule, and give application reviewers access to decision logs on application record pages.

- **Create Application Subtype Definitions**
  Define the types of applications used in your Decision Explainer entities.
- **Create Business Process Type Definitions**
  Define the types of business processes used in your Decision Explainer entities.
- **Create Explainability Action Definitions**
  Define where the metadata for your Decision Explainer business rules are stored.
- **Create Explainability Action Versions**
  Define and store versions of the explainability actions used by your Decision Explainer business rules.
Add the Decision Explainer Log Component to Application Record Pages

Application reviewers see an application’s decision explanations in the Decision Explainer Log History Lightning component. Add it to the appropriate Lightning record pages now.

Create Application Subtype Definitions

Define the types of applications used in your Decision Explainer entities.

Available in: Lightning Experience
Available in: Enterprise, Performance, Unlimited, and Developer Editions

1. From Setup, in the Quick Find box, enter Decision Explainer, and then select Application Subtype Definition.
2. Click New Application Subtype Definition.
3. For Label, enter a name and then press Tab to autopopulate the Developer Name.
   
   Note: The developer name for application subtype definitions is limited to 10 characters. If your label is too long, write a shorter one, or delete some characters from the auto-populated developer name. Try to keep them similar. Keep in mind that every developer name must be unique.

4. Optionally, enter a Description.
5. From the Application Usage Type field, select the application’s domain that best defines the application’s subtype. For example, select Explainability Service.
6. Save your changes, or same them and create another application subtype definition.

Create Business Process Type Definitions

Define the types of business processes used in your Decision Explainer entities.

Available in: Lightning Experience
Available in: Enterprise, Performance, Unlimited, and Developer Editions

1. From Setup, in the Quick Find box, enter Decision Explainer, and then select Business Process Type Definition.
2. Click New Business Process Type Definition.
3. For Label, enter a name and then press Tab to autopopulate the Developer Name.
   
   Note: The developer name for application subtype definitions is limited to 10 characters. If your label is too long, write a shorter one, or delete some characters from the auto-populated developer name. Try to keep them similar. Keep in mind that every developer name must be unique.

4. Optionally, enter a Description.
5. From the Application Usage Type field, select the application's domain that best defines the application's subtype. For example, select Explainability Service.

6. Save your changes, or same them and create another business process type definition.

Create Explainability Action Definitions

Define where the metadata for your Decision Explainer business rules are stored.

Available in: Lightning Experience

Available in: Enterprise, Performance, Unlimited, and Developer Editions

1. From Setup, in the Quick Find box, enter Decision Explainer, and then select Explainability Action Definition.

2. Click Explainability Action Definition.

3. For Label, enter a name and then press Tab to autopopulate the Developer Name.

4. For Business Process Type, click and select the business process type definition for this explainability action definition.

5. For Application Type, select the type of application for which you want to generate an explainability log. For example, select Public Sector.

6. For Action Log Schema Type, select the type of action log schema you want to use for the application. For example, select Expression Set. The default value is Other.

7. Optionally, enter a Description.

8. For Application Subtype, click and select the application subtype definition for this explainability action definition.

9. Save your changes, or save them and create another explainability action definition.

Create Explainability Action Versions

Define and store versions of the explainability actions used by your Decision Explainer business rules.

Available in: Lightning Experience

Available in: Enterprise, Performance, Unlimited, and Developer Editions

1. From Setup, in the Quick Find box, enter Decision Explainer, and then select Explainability Action Version.

2. Click Explainability Action Version.

3. For Label, enter a name.

4. To make this action version available for use, select Active.

   Note: You can’t edit or delete active explainability action version records.

5. For Explainability Action Definition, click and select the explainability action definition for this explainability action version.
6. Optionally, enter a Description.

7. Save your changes, or save them and create another explainability action version.

Add the Decision Explainer Log Component to Application Record Pages

Application reviewers see an application’s decision explanations in the Decision Explainer Log History Lightning component. Add it to the appropriate Lightning record pages now.

Available in: Lightning Experience

Available in: Enterprise, Performance, Unlimited, and Developer Editions

1. From Setup, in Object Manager, click the object whose layout you want to edit. For example, click Business License Application.

2. Click Lightning Record Pages and then click the page layout name. For example, click Business License Application Record Page.

3. Click Edit

4. Drag Decision Explainer Log History from the Components panel to the Lightning page canvas and position it where you want it to appear.

5. If desired, use the properties panel to add filter logic to control when it appears on the page. For more information, see Dynamic Lightning Pages.

6. Save your changes and exit Lightning App Builder.

In the Decision Explainer Log History component, application reviewers see the date and time, expression set name, and version number of each decision. They can click the action menu for any log entry and choose View Details to see the variables, values, and formulas that the expression set used to calculate the decision.

Deploy and Use Analytics for Licenses, Permits, and Inspections

Use the Analytics for Licenses, Permits, and Inspections app to gain intelligent insights that help your agency improve departmental productivity and improve constituent satisfaction.

Deploy Analytics for Licenses, Permits, and Inspections
Deploy Analytics for Licenses, Permits, and Inspections by assigning permissions, enabling Tableau CRM, and building and sharing the analytics app for your users.

Use the Analytics for Licenses, Permits, and Inspections App
Use the dashboards in the Analytics for Licenses, Permits, and Inspections app to gain actionable insights that help you to more effectively manage your agency and its departments, work more productively, and improve satisfaction.
Deploy Analytics for Licenses, Permits, and Inspections

Deploy Analytics for Licenses, Permits, and Inspections by assigning permissions, enabling Tableau CRM, and building and sharing the analytics app for your users.

1. **Assign Admin Permissions for Analytics for Licenses, Permits, and Inspections**
   - Allow admins to create and manage the Analytics for Licenses, Permits, and Inspections app by assigning them the necessary permissions.

2. **Assign User Permissions for Analytics for Licenses, Permits, and Inspections**
   - Allow users to view the Analytics for Licenses, Permits, and Inspections app by assigning them the necessary permissions.

3. **Enable Tableau CRM**
   - Before you create the Analytics for Licenses, Permits, and Inspections app, enable Tableau CRM in your org.

4. **Meet the Data Requirements to Create the Analytics for Licenses, Permits, and Inspections App**
   - To create the Analytics for Licenses, Permits, and Inspections app, make sure that your Salesforce org has the required data.

5. **Set Field-Level Security for the Analytics for Licenses, Permits, and Inspections App**
   - Before you create the Analytics for Licenses, Permits, and Inspections app, make sure that the Analytics Cloud Integration User profile has access to all of the fields that the app uses.

6. **Create and Share the Analytics for Licenses, Permits, and Inspections App**
   - Create an app from the Analytics for Licenses, Permits, and Inspections template and share it with your users.

7. **Keep the Data in the Analytics for Licenses, Permits, and Inspections App Up-to-Date**
   - Keep the data in your analytics app current by scheduling a recipe to update it on a daily basis.

8. **Understand Analytics for Licenses, Permits, and Inspections Limitations**
   - The Analytics for Licenses, Permits, and Inspections app provides access to most Tableau CRM capabilities and features.

**Assign Admin Permissions for Analytics for Licenses, Permits, and Inspections**

Allow admins to create and manage the Analytics for Licenses, Permits, and Inspections app by assigning them the necessary permissions.

1. **From Setup, in the Quick Find box, enter Users, 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 the Tableau CRM Plus Admin and TCRM for Public Sector Admin permission sets.**
5. **Click Add, then save your changes.**
6. **Repeat these steps for other admins who create and manage the Analytics for Licenses, Permits, and Inspections app.**
Assign User Permissions for Analytics for Licenses, Permits, and Inspections

Allow users to view the Analytics for Licenses, Permits, and Inspections app by assigning them the necessary permissions

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click the name of a user who needs access to the Analytics for Licenses, Permits, and Inspections app.
3. Click Permission Set Assignments, and then click Edit Assignments.
4. Select the Tableau CRM Plus User and TCRM for Public Sector User permission sets.
5. Click Add, then save your changes.
6. Repeat these steps for other users who view the Analytics for Licenses, Permits, and Inspections app.

Enable Tableau CRM

Before you create the Analytics for Licenses, Permits, and Inspections app, enable Tableau CRM in your org.

1. From Setup, in the Quick Find box, enter Getting Started and then, under Analytics, select Getting Started.
   If you see the Launch Tableau CRM button, then Tableau CRM is already enabled in your org. Otherwise, turn it on.
2. Click Enable Tableau CRM.

Meet the Data Requirements to Create the Analytics for Licenses, Permits, and Inspections App

To create the Analytics for Licenses, Permits, and Inspections app, make sure that your Salesforce org has the required data.

Your org must have at least one record in any one of these objects.

- Business License Application
- Individual Application
- Public Complaint
- Regulatory Transaction Fee
- Visit

If your org doesn’t have at least one record in at least one of these objects, then you’ll get an error when you try to create the Analytics for Licensing, Permits, and Inspections app. Follow the instructions in the message to add the required data, and then try to create the app again.
Set Field-Level Security for the Analytics for Licenses, Permits, and Inspections App

Before you create the Analytics for Licenses, Permits, and Inspections app, make sure that the Analytics Cloud Integration User profile has access to all of the fields that the app uses.

1. From Setup, in Object Manager, click an object that’s used in the Analytics for Licenses, Permits, and Inspections app. For example, click Business License Application.
2. Click Fields & Relationships.
3. Click the field name and then click Set Field-Level Security.
4. For the Analytics Cloud Integration User profile, select Visible, and then save your changes.
5. Repeat these steps for all of the fields on all of the objects that the app uses.

Create and Share the Analytics for Licenses, Permits, and Inspections App

Create an app from the Analytics for Licenses, Permits, and Inspections template and share it with your users.

1. In Tableau CRM Analytics Studio, click Create and then select App.
2. Select the Analytics for Licenses, Permits, and Inspections template, then click Continue.
3. Review the preview page, then click Continue.
4. To create an app or use settings from an existing app, make a selection, and click Continue. Analytics runs a compatibility check of the data in your Salesforce org.
5. If the compatibility check uncovers any issues, follow the instructions in the error message to resolve them. Then, try to create the app again. When the compatibility check completes successfully, click Looks good, next.
6. Name your app, then click Create. The process takes a few minutes. When it completes, refresh the page.

Note: If you see an error saying the Analytics Integration User doesn’t have access to selected fields, update the field-level security for the app. See Set Field-Level Security for the Analytics for Licenses, Permits, and Inspections App on page 75. For more information about FLS, see Field-Level Security in Salesforce Help.

Now, share the app with your users. You can share it only with users who are assigned the admin or user permission sets for Analytics for Licenses, Permits, and Inspections.

1. In Tableau CRM Analytics Studio, open your app and click .
2. On the Give Access tab of the share window, under Invite others, add the names of users in your org.
3. For every user you add, select their level of access: Viewer, Editor, or Manager.
4. Save your changes.
Keep the Data in the Analytics for Licenses, Permits, and Inspections App Up-to-Date

Keep the data in your analytics app current by scheduling a recipe to update it on a daily basis.

1. In Tableau CRM Analytics Studio, click ⌁ and select Data Manager.
2. Select Dataflows & Recipes and then select the Recipes tab.
3. Click the action menu for your app and select Schedule.
4. Select the schedule mode and specify the details for when the recipe updates the data in the app. We recommend that you use the time-based mode and update the data every day outside of normal business hours, such as midnight in the majority of your users’ time zone.
5. Save your work.

Understand Analytics for Licenses, Permits, and Inspections Limitations

The Analytics for Licenses, Permits, and Inspections app provides access to most Tableau CRM capabilities and features.

<table>
<thead>
<tr>
<th>Capability</th>
<th>Supports</th>
</tr>
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<tbody>
<tr>
<td>Data sources</td>
<td>Salesforce and external data</td>
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<tr>
<td>Object support</td>
<td>Standard and custom objects</td>
</tr>
<tr>
<td>Data volume</td>
<td>10 billion rows for Tableau CRM Plus</td>
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<td>Customize existing dashboards?</td>
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</tr>
<tr>
<td>Create dashboards?</td>
<td>Yes</td>
</tr>
<tr>
<td>Customize existing datasets?</td>
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</tr>
<tr>
<td>Create datasets?</td>
<td>Yes</td>
</tr>
<tr>
<td>Create custom Tableau CRM apps?</td>
<td>Yes</td>
</tr>
<tr>
<td>Supports Einstein Discovery and Experience Cloud integration?</td>
<td>Yes</td>
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<td>Supports bulk actions and Apex steps?</td>
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<td>Supports Sales Cloud Einstein AI features?</td>
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<td>Einstein Prediction Builder</td>
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<tr>
<td>Fast Start Templates</td>
<td>Yes</td>
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</tbody>
</table>
Use the Analytics for Licenses, Permits, and Inspections App

Use the dashboards in the Analytics for Licenses, Permits, and Inspections app to gain actionable insights that help you to more effectively manage your agency and its departments, work more productively, and improve satisfaction.

Access the Analytics for Licenses, Permits, and Inspections app and its dashboards through Tableau CRM Analytics Studio.

1. From the App Launcher, select Analytics Studio.
2. On the Tableau CRM home page, under Browse in the left column, select All Items.
3. Select the Apps tab, then click your app. If you can’t find it, ask your Salesforce administrator for the name of the app, or ask them to deploy it.
4. Click the Dashboards tab to see the list of dashboards.

Compliance Insights

The Compliance Insights dashboard tracks your agency’s performance and provides insights into the impact of inspections and enforcement actions on violations. The dashboard charts answer these questions.

- How’s my team performing based on inspections?
- What’s the trend of inspections and violations over a selected time period?
- What’s the trend of inspections and enforcement actions over a selected time period?
- How’s my agency performing based on inspections, violations, complaints, and enforcement actions?

Executive Summary

The Executive Summary dashboard monitors your agency’s performance and constituent satisfaction. The dashboard charts answer these questions.

- What’s the trend of applications and application licenses over time?
- How are the applications distributed across business types, license types, and regulatory authorities?
- What are the top 5 accounts based on license issued?
- What’s the total fees charged over time based on fee sources?
- What’s the trend of inspections over time?
- What are the top 5 accounts based on total fees?
- How’s my agency performing based on inspections, violations, and complaints?

Department Summary

The Department Summary dashboard monitors your department’s performance and identifies applications and inspections that need attention. The dashboard charts answer these questions.

- How’s my department performing when compared to a previous period?
- What’s the total number of licenses issued by regulatory authorities?
- Which applications and inspections need my attention?
- What’s the distribution of inspections and violations by inspection type?
Account Insights

The Account Insights dashboard provides insights into the status of applications, licenses, complaints, inspections, and violations associated with the account. The dashboard charts answer these questions.

- How many open violations does this account have?
- What’s the duration for which the violations are open?
- What’s the status of applications, licenses, inspections, violations, and complaints?

Which Objects are Available for Experience Cloud Users?

An Experience Cloud license determines the baseline feature access available to an Experience Cloud user. Each Experience Cloud license makes create, read, edit, or delete permissions available to Experience Cloud site users for specific data objects. Assign user permissions for these objects through a profile, permission set, or both.

This page lists the object access you can grant to Experience Cloud users under each of these licenses: Customer Community, Customer Community Plus, Partner Community, and External Apps.

Note: This table lists all objects provided by all Industries products. Not all of these objects are available with your specific Public Sector Cloud license.

Each license has a “login” version that provides identical access levels. If you experience any difficulties with a login license, contact your Salesforce representative.

As a best practice, always clone the standard profile associated with a community license, and change object permissions as needed. If you want to limit the number of cloned profiles, use permission sets to assign object permissions.

Objects in **bold** are automatically available to users when the license is provisioned. All other objects must be assigned in a profile or permission set.

<table>
<thead>
<tr>
<th></th>
<th>Customer Community</th>
<th>Customer Community Plus</th>
<th>Partner Community</th>
<th>External Apps</th>
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## Which Objects are Available for Experience Cloud Users?

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**Extend Public Sector Solutions’ Capabilities with Other Salesforce Products**

Use other Salesforce products with Public Sector Solutions.

**Protect Your Sensitive Data with Salesforce Shield**

Salesforce Shield is a set of security tools you can use to comply with regulations for storing protected health information (PHI). With Platform Encryption and Event Monitoring, you can monitor usage, prevent malicious activity, and protect data at rest while allowing full functionality.
Find Funding Opportunities Using Grants Management
Grants Management helps foundations quickly create and launch a grants management solution that tracks, manages, and delivers funding programs to deserving individuals and organizations. It also includes the Grantee Portal Experience Cloud site template, providing your grant-seekers and grantees a place to apply for funding, share outcomes, and engage with you as a funder.

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EDITIONS
Available in: Lightning Experience
Available in: Enterprise, Performance, Unlimited, and Developer Editions

Platform Encryption
Platform Encryption allows you to natively encrypt your most sensitive data at rest, allowing you to address HIPAA requirements for storing sensitive PHI. Encryption helps you protect personally identifiable information (PII), PHI, sensitive, confidential, or proprietary data. It also enables you to meet both external and internal data compliance policies while keeping critical app functionality, such as search, workflow, and validation rules. You keep full control over encryption keys, and you 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?

Event Monitoring
Event Monitoring gives you access to detailed performance, security, and usage data for 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.

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Grants Management users can choose to use either of the packages:

- **Outbound Funds Module.** This is a free add-on created by the .org community.
- **Grants Management.** This is a managed package that is maintained by the Salesforce product team.

**Note:** The Grants Management package also includes the Outbound Funds Module.

To learn more, see the Grants Management documentation site.

SEE ALSO:
- Install Outbound Funds Module
- Install Grants Management