

salesforce

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# Work.com Release Notes

Salesforce, Spring '24

'24



Last updated: April 26, 2024



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# WORK.COM RELEASE NOTES

See what's new in Work.com. Prepare your business, employees, and facilities. Respond to major events, such as the current COVID-19 crisis, with the apps and services in Work.com.

The Work.com solution contains many products. Work.com was initially released on June 1, 2020.



**Tip:** We list new features and behaviors here as they're initially released in the latest package or Salesforce instance. The availability of these changes depends on your Salesforce instance and the deployment of new Salesforce releases and package updates to your org, which can take several days or weeks. Find your org's instance in Setup on the Company Information page, then go to [status.salesforce.com](https://status.salesforce.com) to check your instance's version or maintenance plan. And, in Setup, check the Installed Package page to see which packages are in your org.



**Important:** In the Spring '21 release and later, Community Cloud is called Experience Cloud. The new name better reflects the many types of connected digital experiences you can create—including portals, websites, help centers, forums, and mobile apps.

So what's different? Terminology, for starters. Whether you're creating a forum, portal, or any other type of digital experience, at the most basic level, you're building an online site. So, for example, instead of saying *community*, which primarily connotes a forum where people interact with one another, we now use the term *site* or *Experience Cloud site*. For details, see the [Salesforce Spring '21 Release Notes](#).

These changes affect all Salesforce orgs using Community Cloud. Winter '21 production orgs running Work.com still use the old Community Cloud names and labels. Spring '21 sandboxes running Work.com use the new Experience Cloud names and labels. We'll update the Work.com documentation to reflect the Experience Cloud names when production orgs start running the Spring '21 release. In the meantime, if you accidentally enter *Community* in the Quick Find box in an org running Spring '21, we automatically display the menu renamed Digital Experiences instead. We know that old habits are hard to break!

## [Workplace Command Center](#)

Workplace Command Center helps you monitor return-to-work readiness and decide when to safely bring people back to the workplace. It gives executives, business operations managers, and admins a single view of their employees' readiness to work and the company's readiness to support workers. When employees return to work, keep everyone safe by monitoring employee health and location readiness. Workplace Command Center comes with Employee Wellness Check components, Operations Feed, and Global COVID-19 Tracker.

## [Wellness Check](#)

In a crisis, assess the well-being of your team with Wellness Check. Send surveys to your employees, students, or other stakeholders to get data about how ready they are to return on-site. Then visualize results for your team as a whole and across multiple locations to make smart, data-informed decisions about reopening.

## [Employee Workspace](#)

Employee Workspace is a central digital hub for employees to access tools and resources they need no matter where they work. Provide an integrated experience with Employee Workspace and enable your employees to connect, communicate, and collaborate, and succeed in today's new normal.

## [Employee Concierge](#)

Give your employees the ability to answer questions and solve issues. With Employee Concierge, add a searchable knowledge base and a support ticketing system to your Employee Service site. Designate Knowledge Authors to write articles and IT Agents to manage support tickets. Employee Concierge includes a custom Salesforce app for IT Agents to respond to and resolve tickets.

### [Employee Concierge Bot](#)

Give your employees concise answers to quick questions with a chatbot integrated into Employee Concierge.

### [IT Service Center](#)

Drive proactive resolutions and faster remediation of IT cases with the IT Service Center. Enable IT Agents to accelerate case resolution by using AI-powered productivity tools and real-time endpoint visibility and control powered by Tanium.

### [HR Service Center](#)

Connect and simplify your employee HR management system and easily build processes for employee onboarding with HR Service Center.

### [Service Catalog](#)

A service catalog is a portfolio of the products and services you provide to your employees. Employee Service Catalog helps you turn your employees' requests for those products and services into approved and documented orders.

### [Shift Management](#)

Shift Management for Work.com streamlines the process of getting your employees back to work safely. Model the relationships and occupancy of your workplace sites, facilities, and resources. Then incorporate new requirements and policies to plan for how many people can be on-premises at a time. Let your team know when to show up to avoid crowding in common areas such as lobbies and elevators.

### [Workplace Strategy Planner](#)

Evaluate the risks and priorities of operating each of your workplace locations. With Workplace Strategy Planner, add COVID-19 public health data, government guidelines, and business priorities to give more context to the current conditions at your workplace locations. Use the interactive dashboard to analyze the data in aggregate and to help you decide when to open or close a location.

### [Emergency Response Management](#)

Use Emergency Response Management products and solutions to serve residents, communities, and agencies when they need it most. Provide access to emergency information, deliver care to those affected, and allocate resources and services with more speed and efficacy than ever before.

### [Customer-Facing Apps](#)

Our customer-facing Work.com apps help you reestablish customer trust and jumpstart business growth. Our Queue Management app helps you regulate customer flow with a digital wait-list for patrons and occupancy oversight tools. Broadcast Messaging keeps customers informed with notifications and automatic responses. Digital Trust Cards give your customers peace of mind by identifying the safety protocols you're taking to safely reopen and operate your business.

### [Changes to Standard Objects, Records, and Metadata Types](#)

Here you can find new features or changes to Work.com standard objects.

#### SEE ALSO:

[Salesforce Work.com Learning Map](#)


[Promote Wellness and Productivity with Work.com](#)

## Workplace Command Center

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Workplace Command Center helps you monitor return-to-work readiness and decide when to safely bring people back to the workplace. It gives executives, business operations managers, and admins a single view of their employees' readiness to work and the company's readiness to support workers. When employees return to work, keep everyone safe by monitoring employee health and location readiness. Workplace Command Center comes with Employee Wellness Check components, Operations Feed, and Global COVID-19 Tracker.

**Where:** Workplace Command Center is available in Lightning Experience in Enterprise and Unlimited editions.

 **Note:** We reorganized our release notes and created a section for [Work.com standard object records](#). Some of the release notes originally in this section were moved over to the new section.

#### [July 15, 2021 \(Package 5.13\): Minor Localization Updates](#)

This patch release of Workplace Command Center includes minor localization updates. No user action is necessary.

#### [May 3, 2021 \(Package 5.8\): Minor Updates in Support of Aggregation Efficiency](#)

This patch release includes minor updates to support efficient data aggregation for your reporting where Workplace Command Center is installed. No user action is necessary.

#### [February 17, 2021 \(Package 5.6\): Minor Updates in Support of Employee Concierge Installation](#)

This patch release includes minor updates that simplify the installation of Employee Concierge in an org where Workplace Command Center is installed. No user action is necessary.

#### [February 3, 2021 \(Package 5.5\): New List View, Navigation, and Default Batch Size](#)

Workplace Command Center adds an All Command Center Logs list view. If you have more than 100 locations at any hierarchy level, you can expand the list as needed or view a list of all child locations. The default batch size for location wellness aggregation is now 50.

#### [December 15, 2020 \(Package 5.3\): Filter Data on More Locations and Detect When Map Markers Represent Locations with Mixed Statuses](#)

Version 5 of Workplace Command Center expands your location search capabilities to include any location in the hierarchy. You can also now easily recognize when a map marker represents multiple locations at the current zoom level and whether those locations have the same workplace status.

#### [November 11, 2020 \(Package 4.6\): An Automatic Employee-User Sync, New and Changed Custom Objects, Plus New Fields on the Employee Object](#)

We introduced an Employee-User Sync feature that automatically creates a user record when a new employee record is added to an org. We also created a custom object and changed two custom objects. We also list new fields on the Employee standard object that were introduced in the Winter '21 (API version 50.0) release.

#### [October 19, 2020 \(Package 4.1\): Workplace Command Center: New Location Hierarchy, Improved Accessibility, and Translation Support in Trial Orgs](#)

Version 4 of Workplace Command Center includes a new editable location hierarchy component, an enhanced filter that shows recently viewed locations, and improved color contrast. Also, Work.com trial orgs are now available in 35 languages.

#### [September 3, 2020: Workplace Command Center: Easier Setup, Less Maintenance, and a Free Trial](#)

Version 3 of Workplace Command Center includes improvements to the setup and maintenance of your Work.com org.

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- Added All Command Center Logs list view

The Workplace Command Center package now includes an All Command Center Logs list view. All Command Center Logs is the default view when you navigate to Command Center Logs from the App Launcher.

- Improved navigation options on the Location Hierarchy page if you have more than 100 at any level

If there are 100 or more locations at any hierarchy level, click the new Show More Locations link as needed to expand the list by up to another 100 locations. Alternatively, you can go to the row-level menu and select View All Child Locations. You can also click the location name to go to that location's detail page.

- Changed default batch size for location wellness aggregation

In version 5.1 and later, the default batch size for location wellness aggregation is now 50. This batch size is used when processing location wellness records. The default batch size was lowered from 200 to 50 to reduce the likelihood of governor limit errors.

## December 15, 2020 (Package 5.3): Filter Data on More Locations and Detect When Map Markers Represent Locations with Mixed Statuses

Version 5 of Workplace Command Center expands your location search capabilities to include any location in the hierarchy. You can also now easily recognize when a map marker represents multiple locations at the current zoom level and whether those locations have the same workplace status.

### Filter data on any location in the hierarchy

Give users the ability to scope the data shown in several Workplace Command Center components to any location in the hierarchy. When the Location Search Filter Level is set to all levels, users can search on any location in the hierarchy. Users see results filtered to show only the specified location and its sublocations, if any. If all the sublocations are unaddressed, the sublocations are listed down to the lowest-level addressed locations or the immediate sublocations.

Now that your users have more filtering flexibility, consider whether you can add value for them by adding locations to your data model that represent geographic abstractions.

When you set the Location Search Filter Level to support all levels of the location hierarchy, that setting is supported by these components.

- Wellness Status
- Wellness Status by Location
- Location Status
- Operations Feed (tasks)



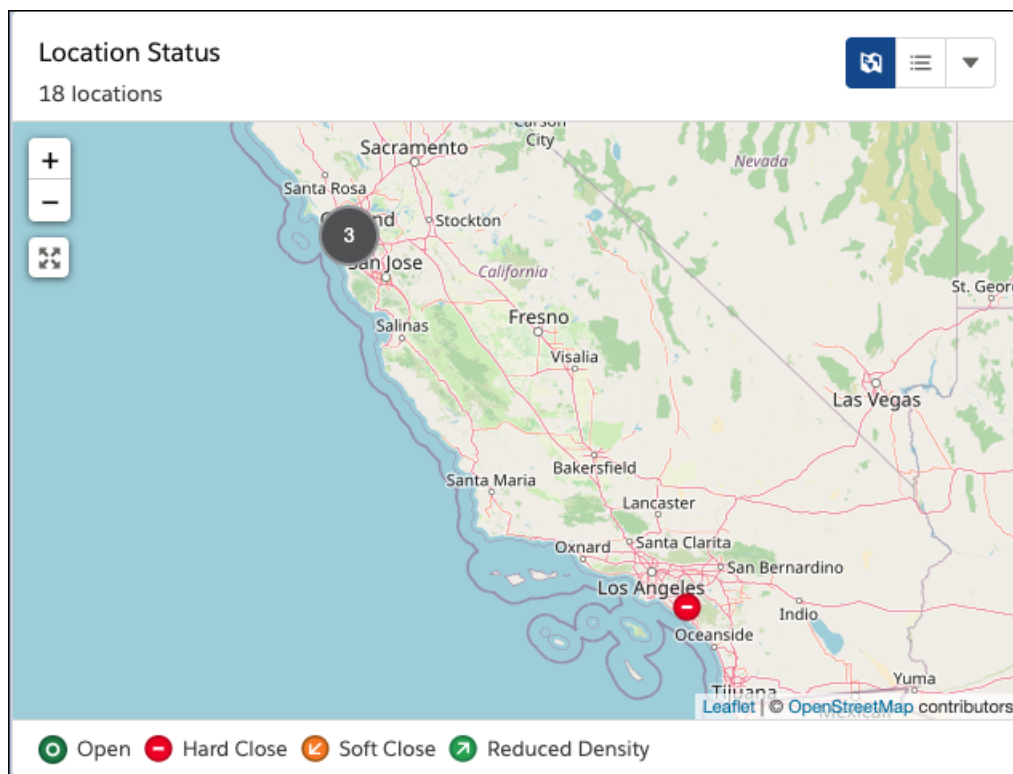
**Important:** Some Workplace Command Center components don't support filtering searching all location levels, at least not fully. For example, Contact Tracing Status doesn't support location search at all levels. We recommend testing all Workplace Command Center components in a Full sandbox with the Location Search Filter Level set to all levels before you enable this feature in your production org.

[Salesforce Help: Locations and Filtering](#)

**Detect at a glance when locations represented by one map marker at the current zoom have mixed statuses**

When you zoom out in map view, the status of locations that are geographically close to one another roll up into a single marker that represents the cluster. If the locations have the same location workplace status, the cluster marker is the color of the shared status. But if at least one location has a status that differs from the status of nearby locations, the cluster marker is gray. In both cases, a number on the cluster marker indicates the number of locations the marker represents.

For example, this Location Status component indicates that three locations in the San Francisco Bay Area are rolled up into one cluster marker.



The gray color of the cluster marker indicates that the three locations don't have the same location workplace status. If we zoom in, it's clear which status applies to each San Francisco location.



Map clusters are enabled automatically in the org where the Workplace Command Center package is installed.

### Provision Users for Large Amounts of Existing Employee Data

We have added instructions for using Data Loader tools to provision users for existing employee data to overcome limitations of the Employee-User sync feature. Salesforce Help: [Automatically Sync Employee and User Records](#).

### Updated Guidance to Support Large-Scale Direct Child Locations

A single location in a Work.com data model can have many direct child locations, even thousands of direct child locations. However, when a single location has an extremely large number of direct children, the error message `First error: wkcc: Too many query rows: 50001` can be generated.

If this error message is generated, reduce the location wellness fact batch size. Set to 200 by default, the location wellness fact batch size is one of the custom settings for Workplace Command Center. See Salesforce Help for details and how to determine your org's recommended minimum location wellness fact batch size.

[Salesforce Help: Reduce Batch Size to Support Large-Scale Direct Child Locations](#)

### New and changed custom fields on standard objects

#### Clarified in the documentation that only Salesforce modifies the location path for a location

We updated the description for the `wkcc__LocationPath__c` custom field on the Location object.

[Workplace Command Center for Work.com Developer Guide: Location](#)

#### Track employees who indicate they're ready to work at their assigned workplace location

Use the new custom field `wkcc__ReadyToReturn__c` on the Employee standard object. This field isn't included by default on the employee page layout.

#### Add a global region to a workplace address

Use the new custom field `wkcc__Region__c` on the Address standard object. This field allows you to add a global region, such as AMER or APAC, to an address. It's included by default on the Workplace Command Center page layout `btw` Address Layout.

**Add a county or a local/regional municipality to a workplace address**

Use the new custom field `wkcc__County__c` on the Address standard object. For locations within the United States, use this field for county names. For locations outside of the United States, you can use this field for the local or regional municipality. This field is included by default on the Workplace Command Center page layout `btw Address Layout`.

## November 11, 2020 (Package 4.6): An Automatic Employee-User Sync, New and Changed Custom Objects, Plus New Fields on the Employee Object

We introduced an Employee-User Sync feature that automatically creates a user record when a new employee record is added to an org. We also created a custom object and changed two custom objects. We also list new fields on the Employee standard object that were introduced in the Winter '21 (API version 50.0) release.

**Associate User records with Employee records with Employee-User Sync**

Employee-User Sync features help organizations configure how to associate Employee records with User records and cascade updates from Employee records to User records. Use the **Create Users** feature to create or link existing employees to users in your org quickly. Or use the new auto-create users feature to automatically create users for new Employee records. For more information, see [Create and Import Data](#).

**New and changed custom objects****wkcc\_LocationWellnessAggregation\_\_c**

This new object aggregates wellness counts by location and status of employees directly linked to a location.

**wkcc\_LocationWellnessFact\_\_c**

The new `wkcc__NeedsReaggregation__c` field indicates whether wellness status data must be reaggregated by a batch process.

**wkcc\_LocationWellnessStaging\_\_c**

This object is now deprecated and its data is no longer updated.

**New fields on the Employee standard object**

These changes appear in orgs using the Winter '21 (API version 50.0) release. We added fields that enhance an employee's profile with information about their availability.

**View or edit general information about an employee**

Use the new `AboutMe` field on the Employee object.

**View or edit information about an employee's availability, working hours and time zone**

Use the new `Availability` field on the Employee object.

Use the new `AvailabilityEndDate` field on the Employee object.

Use the new `AvailabilityStartDate` field on the Employee object.

Use the new `OutOfOfficeMessage` field on the Employee object.

Use the new `TimeZone` field on the Employee object.

Use the new `WorkingHoursEnd` field on the Employee object.

Use the new `WorkingHoursStart` field on the Employee object.

# October 19, 2020 (Package 4.1): Workplace Command Center: New Location Hierarchy, Improved Accessibility, and Translation Support in Trial Orgs

Version 4 of Workplace Command Center includes a new editable location hierarchy component, an enhanced filter that shows recently viewed locations, and improved color contrast. Also, Work.com trial orgs are now available in 35 languages.

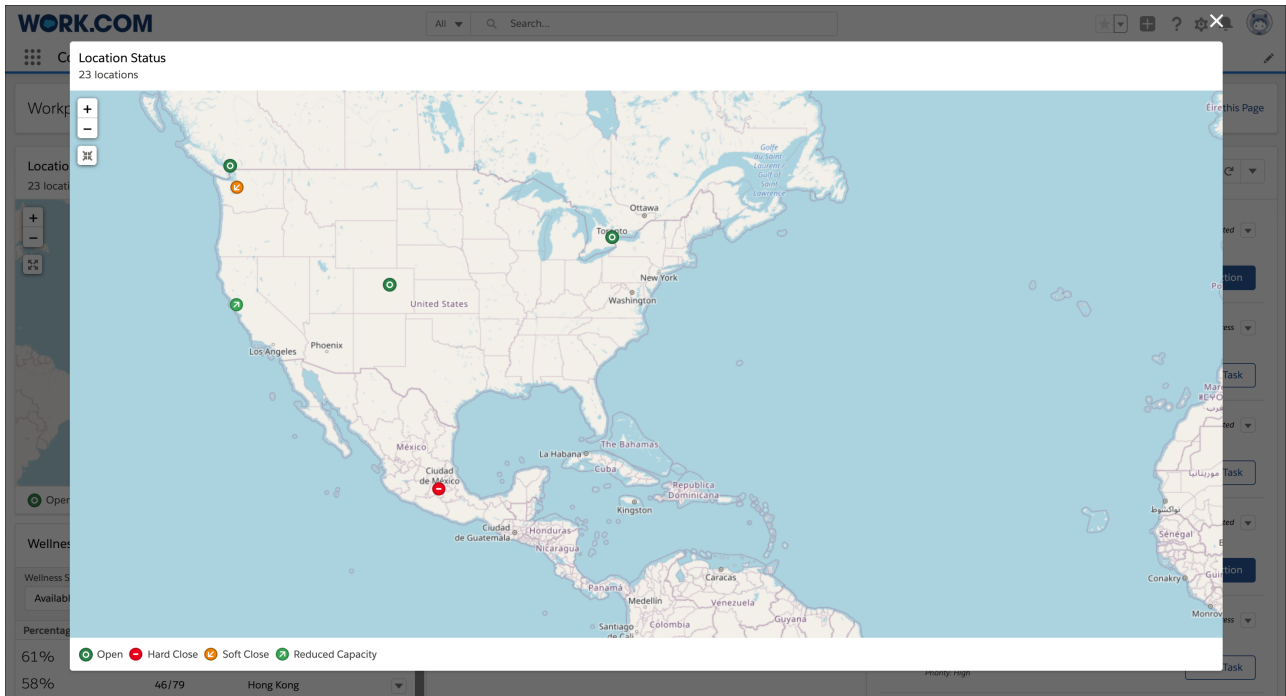
## View and edit Locations faster using Location Hierarchy

The location hierarchy component shows your location records in hierarchical order. Quickly view locations and sublocations by expanding the nested tree. To edit the hierarchy or status of whether they are ready to open or still closed, you can use the dropdown menu.

Name	Location Type	Status	
> Auckland	Site	Open	▼
▼ Denver	Site	Open	▼
▼ Denver Office	Building	Reduced Density	▼
▼ Denver - Floor 1	Floor	Reduced Density	▼
Denver - Floor 1 - Area 1	Area	Reduced Density	▼
Denver - Floor 1 - Area 2	Area	Reduced Density	▼
> Denver - Floor 2	Floor	Reduced Density	▼
> Denver - Floor 3	Floor	Reduced Density	▼
> Lakewood Office	Building	Hard Close	▼
> London	Site	Reduced Density	▼
> Paris	Site	Hard Close	▼
> San Francisco	Site	Reduced Density	▼
> Seattle	Site	Soft Close	▼
> Vancouver	Site	Open	▼

**Expand your horizons with the Location Status large map view**

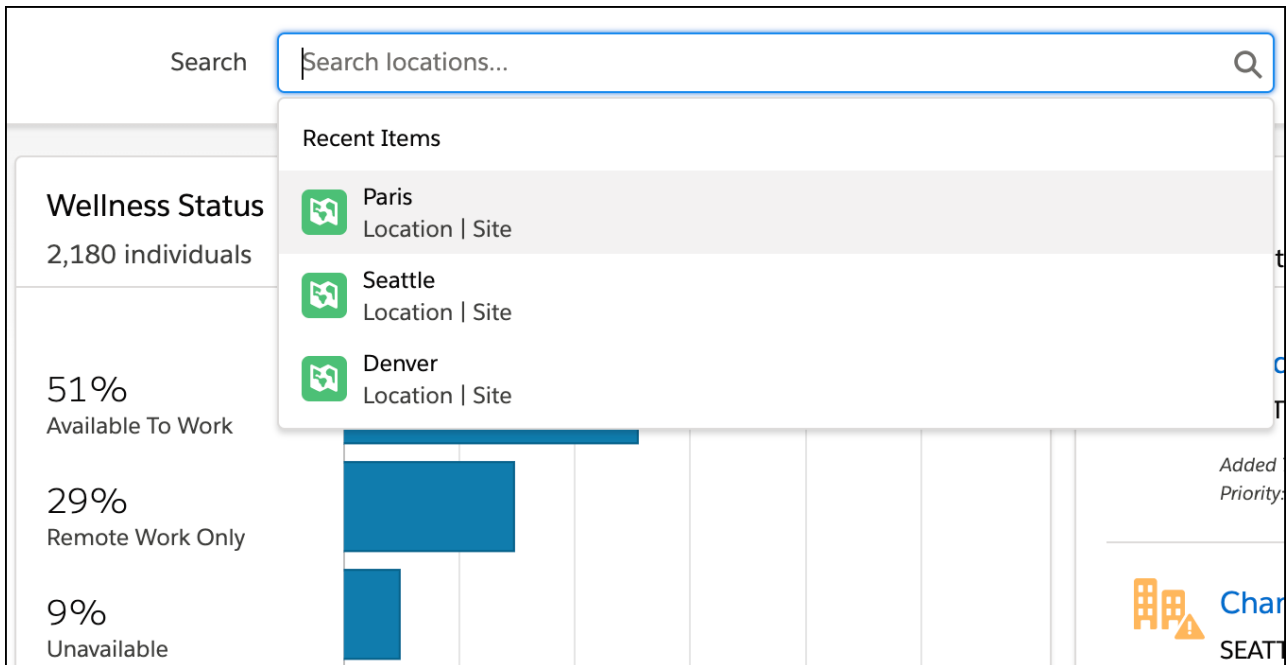
The Location Workplace Status component is now known simply as Location Status. And the map view includes a window that opens an enlarged map of your locations and their



[Salesforce Help: View Workplaces on a Map or in a List](#)

**Quickly return to the most recently viewed Locations**

Get back to work faster using the enhanced Location filter. The Location filter now includes a recent items list that shows your most recently viewed locations.



**Improved accessibility in Workplace Command Center**

To improve color contrast in Workplace Command Center, some colors are enhanced. This update makes Command Center more accessible.

**Configure sharing rules automatically in new orgs**

Set up Workplace Command Center with fewer manual steps. The Salesforce installer that's used to install packages and automate configuration can now add sharing rules for Workplace Admins, Operations Managers, and Executives. This option is available only to new Work.com orgs following the recommended installation and setup process for the Workplace Command Center and Wellness Check packages.

**Take a tour of a Work.com trial in more languages**

The Work.com trial org is now available in 35 languages. You can use a trial org to check out the Salesforce apps that can help your organization get back to work safely. Sign up for a trial, then use the learning map that's linked at the top of the setup page to navigate educational Work.com resources. Contact your account executive for more information on how to get a free 30-day trial.

## September 3, 2020: Workplace Command Center: Easier Setup, Less Maintenance, and a Free Trial

Version 3 of Workplace Command Center includes improvements to the setup and maintenance of your Work.com org.

**Add current Workplace Command Center permissions to your org**

We added a feature to the Command Center that checks if the permissions in your org are in sync with the latest package. If the permissions in your org don't match our more recent package, an **Update Permissions** button appears. To take advantage of this new feature, existing orgs with the Workplace Command Center package installed must first add and transition users to our recommended permissions. Update now to ensure access to permission changes in future package releases.

[Salesforce Help: Upgrade to Workplace Command Center Package Version 3](#)

**Install and configure packages faster**

New Work.com orgs can now complete the setup processes for the Workplace Command Center and Wellness Check packages faster. We introduced a Salesforce installer service that adds the packages and automates some required configuration that was previously completed manually. This installer service is supported for new orgs only.

[Salesforce Help: Install Workplace Command Center and Wellness Check](#)

**Spend less time on maintenance with new Command Center Settings**

There are only so many hours in a day to test new features, troubleshoot bugs, and respond to requests from your users. We can't add more hours to your day, but we can add settings to help reduce the amount of time you spend maintaining an org. Look for new settings in the Location Data and Permissions section on the Command Center Settings tab.

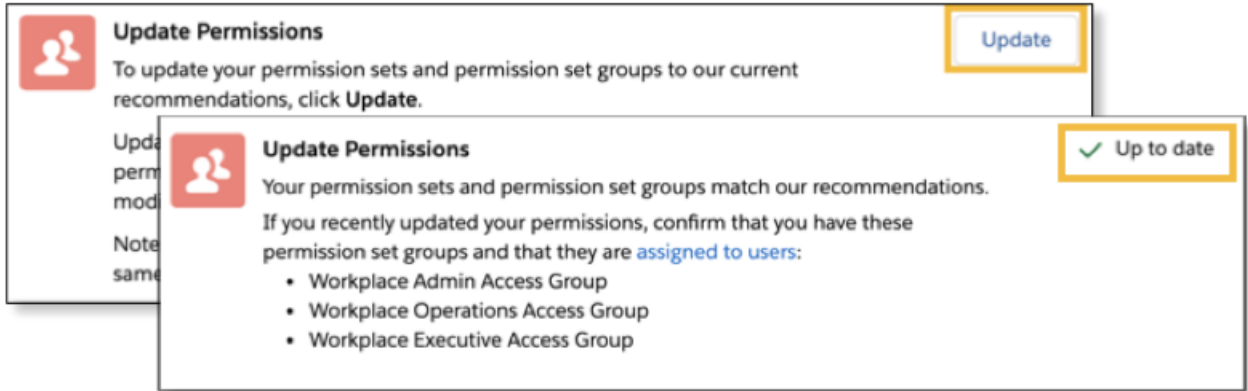
**Recalculate location and wellness data automatically**

Why run a script when you can click a button? Automatically run batch jobs to configure your location hierarchy and recalculate the aggregated wellness value for each of your workplace locations. On the Command Center Settings tab, use the Run button in the Configure Location Data section to run these batch jobs.

[Salesforce Help: Populate the Location Hierarchy and Recalculate Wellness Fact Records](#)

**Know when permissions change and update them quickly**

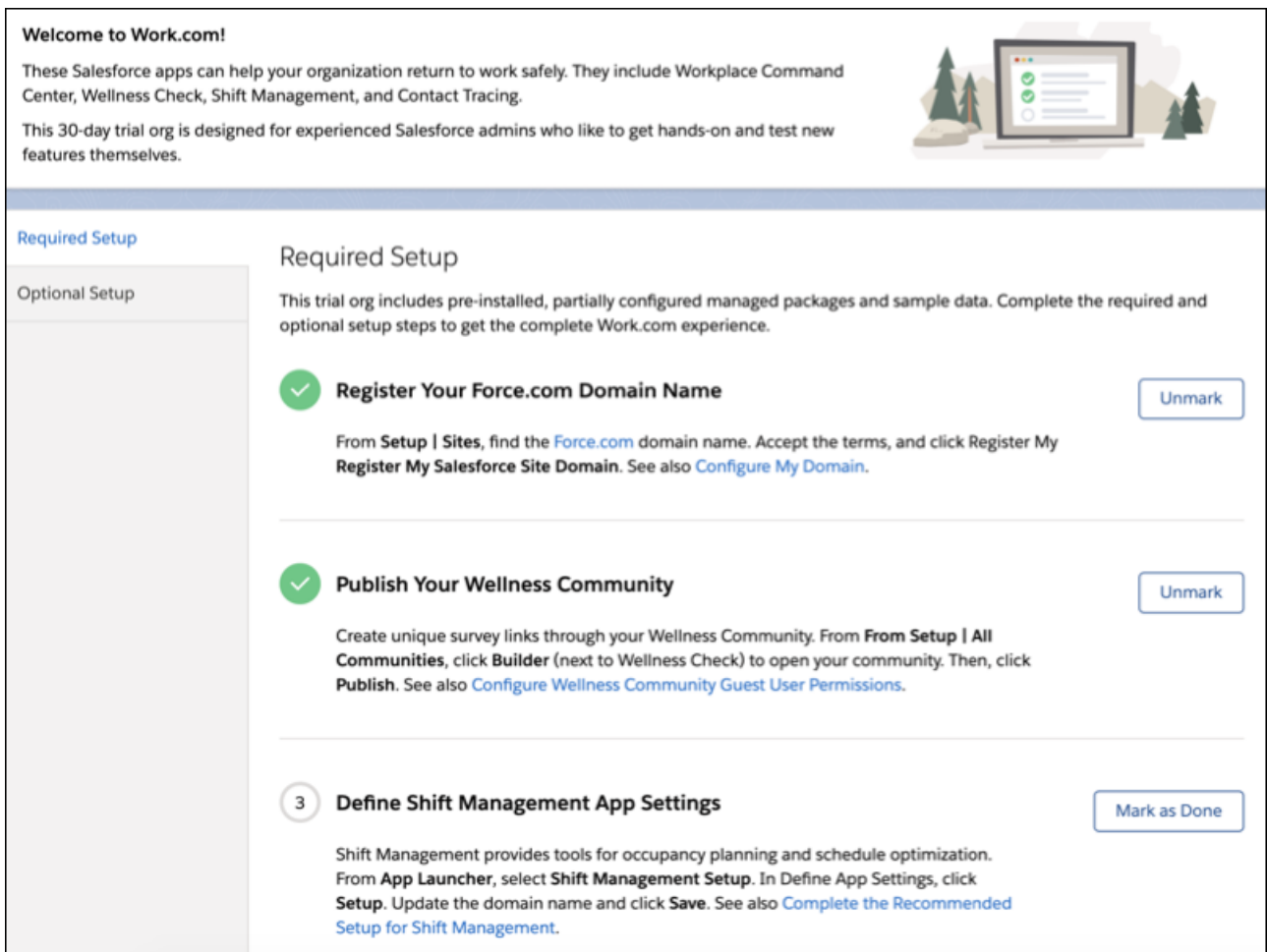
Sometimes a new or changed component in the Workplace Command Center requires a permission update. Rather than hunt down and make the required changes manually, visit the Update Permissions section in the Command Center Settings tab. If the permissions in your org are in sync with the current package recommendations, an up-to-date status appears. If the package permissions are different than the permissions in your org, a button prompts you to update them.



[Salesforce Help: Update Permissions from Command Center Settings](#)

**Explore possibilities for your workplace with a Work.com trial org**

Enticed by our demos but haven't tried Work.com yet? Sign up for a free 30-day trial org, and check out the Salesforce apps that can help your organization get back to work safely. The trial org is designed for experienced Salesforce admins who like to get hands-on and test new features themselves. Contact your account executive for more information.



## Wellness Check

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In a crisis, assess the well-being of your team with Wellness Check. Send surveys to your employees, students, or other stakeholders to get data about how ready they are to return on-site. Then visualize results for your team as a whole and across multiple locations to make smart, data-informed decisions about reopening.

**Where:** Wellness Check is included in the Workplace Command Center installation. It is available in Lightning Experience in Enterprise and Unlimited editions.

**Who:** Facility and operations managers who must gather and view data for the Workplace Command Center.

### [December 15, 2020 \(Package 5.3\): Require Authentication for Survey Access, Show Employees Their Wellness Status and Pending Surveys](#)

Version 5 of Wellness Check includes an option for requiring recipients to authenticate to access wellness surveys and a widget that helps employees manage their own wellness status.

### [October 19, 2020: Survey Schedule History and Configurable Reply-To Name and Address](#)

With version 4 of Wellness Check (included in Workplace Command Center package 4.1), you can review the history of past surveys. You can also select a name and address from among your Salesforce org's verified organization-wide email addresses to use in the reply-to line of survey emails.

### [September 3, 2020: Schedule When to Send Surveys](#)

With version 3 of Wellness Check, you can create schedules that define when to send a survey to your team and how often.

### [July 27, 2020: Send Surveys to One or More Locations and to Specific Roles, More Email Template Options, and Changes to Support a Wider Range of Customer Environments](#)

With version 2 of Wellness Check, send a survey to recipients at one or more locations from the Locations tab and send only to individuals with the same role at those locations. Access email templates in more folders. We also adapted Wellness Check for use by a wider range of customers.

## December 15, 2020 (Package 5.3): Require Authentication for Survey Access, Show Employees Their Wellness Status and Pending Surveys

Version 5 of Wellness Check includes an option for requiring recipients to authenticate to access wellness surveys and a widget that helps employees manage their own wellness status.

### **Add an authentication requirement to surveys**

To ensure that wellness surveys are completed by the intended recipient, you can choose to add an authentication requirement when you send or schedule surveys. When authentication is required, the recipient must enter their credentials to access the survey.

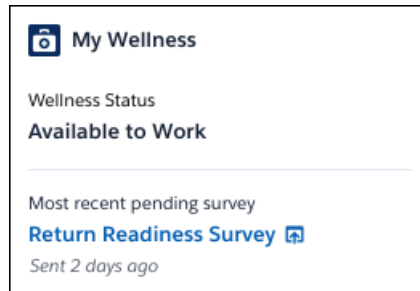
If you want to require authentication, be sure that the recipients have both an employee record and an associated user record in the Work.com org, that the employee record includes an email address, and that each recipient is a member of the Wellness Check community. Individuals who don't meet these requirements can't be sent a survey that requires authentication for access.

*Salesforce Help: Survey Authentication*


### **Show employees their current wellness status and pending surveys**

Deploy the new Wellness Widget so that employees can verify whether their own wellness status of record is correct. If the employee has one or more survey invitations that they haven't yet responded to, the widget also provides a link to the most recent invitation for each pending survey.





You can add the My Wellness component to any activated community in orgs where the version 5 Workplace Command Center package is installed.

 **Note:** When the Wellness Widget is configured correctly, employees can use it to see their own wellness status but not the wellness status of other employees. Even so, we don't recommend deploying the Wellness Widget to public pages.

*Salesforce Help:* Keep Users Up To Date on Their Wellness Status

### New custom fields on standard objects

#### Get the date and time of the last wellness status update for an employee

Use the new custom field `wkcc__CurrentWellnessStatusAsOf__c` on the Employee standard object. This field isn't part of the default Employee page layout. To add this field, edit the page layout for Employee.

[Workplace Command Center for Work.com Developer Guide: Custom Fields on Employee](#)

### Changed custom objects

#### Indicate whether responding to surveys sent out by a given schedule requires authentication

Use the new `wkcc__AuthenticationRequired__c` field on the `wkcc__SurveySchedule__c` custom object.

[Workplace Command Center for Work.com Developer Guide: wkcc\\_\\_SurveySchedule\\_\\_c](#)

## October 19, 2020: Survey Schedule History and Configurable Reply-To Name and Address

With version 4 of Wellness Check (included in Workplace Command Center package 4.1), you can review the history of past surveys. You can also select a name and address from among your Salesforce org's verified organization-wide email addresses to use in the reply-to line of survey emails.

### Review survey schedule history for monitoring and follow-up

Wellness Check now provides history data for each sending of a survey. A survey schedule history provides an audit trail that you can use to verify when surveys were sent, the name of the survey sent, which schedule applied, and whether surveys were sent successfully.

*Salesforce Help:* [Review Survey Schedule History](#)

### Boost survey credibility by using an organization-wide reply-to name and email address

Sometimes recipients are wary of the email that they receive. For example, when team members get emails inviting them to take a wellness survey, sometimes they view the email with suspicion, thinking that it's a phishing attempt or a mistake. If the reply-to name and address on the email is unfamiliar to recipients, it's possible that you don't get the response rate that you want. You can now select a name and email address from among your org's verified organization-wide email addresses to use in the reply-to line of survey emails.

*Salesforce Help:* [Configure Survey Reply-to Name and Email Address](#)

## New Custom Objects

### Review the past sending history of surveys

Use the new `wkcc__SurveyHistory__c` custom object. The details represented include the selected survey, the selected email template, and the filter criteria.

[Workplace Command Center for Work.com Developer Guide: wkcc\\_\\_SurveyHistory\\_\\_c](#)

## September 3, 2020: Schedule When to Send Surveys

With version 3 of Wellness Check, you can create schedules that define when to send a survey to your team and how often.

### Schedule when to send surveys to your team

You can define schedules for sending surveys to individual recipients or to specific locations. You can choose to send the survey at a specific date and time once, daily, or weekly. You can also deactivate a schedule without deleting it to accommodate temporary changes to your survey needs.

[Salesforce Help: Send Surveys to One or More Employees](#)

[Salesforce Help: Send Surveys to One or More Locations](#)

[Salesforce Help: Deactivate or Activate Survey Schedules](#)

### Send survey default batch size increased

Increased from 200 in version 2 of Wellness Check, the new default batch size of 1000 surveys is now documented.

[Salesforce Help: Modify Survey Process Settings](#)

## New Custom Objects

### Customize the details of a survey schedule

Use the new `wkcc__SurveySchedule__c` custom object. The details represented include the selected survey, the selected email template, and the filter criteria.

[Workplace Command Center for Work.com Developer Guide: wkcc\\_\\_SurveySchedule\\_\\_c](#)

### Customize details about recipients of a survey sent out by a particular survey schedule

Use the new `wkcc__SurveyScheduleRecipient__c` custom object. The recipients can be employees or locations.

[Workplace Command Center for Work.com Developer Guide: wkcc\\_\\_SurveyScheduleRecipient\\_\\_c](#)

## July 27, 2020: Send Surveys to One or More Locations and to Specific Roles, More Email Template Options, and Changes to Support a Wider Range of Customer Environments

With version 2 of Wellness Check, send a survey to recipients at one or more locations from the Locations tab and send only to individuals with the same role at those locations. Access email templates in more folders. We also adapted Wellness Check for use by a wider range of customers.

### To help a wider range of customers use the Workplace Command Center to survey their team members, we've renamed Employee Wellness Check to Wellness Check

We've also renamed the Return to Work survey to Return Readiness, along with minor changes to the included email templates and the Wellness Check interface.

### Send surveys to everyone at one or more locations, right from the Locations tab

Select one or more locations, then click Send Survey. You can choose whether to also include people at sublocations.

**Send surveys to recipients with the same role at selected locations**

When you send out surveys to selected locations, you can choose to send the survey only to individuals who share a particular role.

**Access more email template folders when sending out surveys**

When sending out surveys, you can select an email template from the My Templates, Public Email Templates, Private Email Templates, and Unfiled Public Classic Email Templates folders.

## Employee Workspace

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Employee Workspace is a central digital hub for employees to access tools and resources they need no matter where they work. Provide an integrated experience with Employee Workspace and enable your employees to connect, communicate, and collaborate, and succeed in today's new normal.

**Where:** Available in Lightning Experience in Enterprise and Unlimited editions.

**How:** Use Employee Workspace to create a home for your employees when they log in.

[December 1, 2023 \(Package 12.3\): Employee Service Site Enhancements](#)

The latest Employee Workspace package provides an enhancement to the Employee Service site functionality. Previously, to navigate, you double-clicked the Service Catalog Categories tab on the Apps page twice.

[November 30, 2021 \(Package 8.4\): Enhancements for Employee Workspace Customizations](#)

Streamlined and updated procedures make it easier to customize the Employee Workspace news banner, hero component, and search component.

[July 8, 2021 \(Package 8.1\): Showcase Your Work History with Employee Portfolio](#)

Employee Portfolio gives you and your colleagues a view into everyone's work history and skills.

[March 15, 2021 \(Version 2.0, Package 6.1\): New Search Components and Support for Overflow Items on Mobile](#)

This update adds the Hero and Search Box components to Employee Workspace. Use the hero component to give your Employee Workspace site a visually striking home base where your users start their day. You can customize the background image and title text of the hero component to fit your brand. Use the search box component to add a convenient global search box anywhere on your site.

[December 15, 2020 \(Version 1, Package 5.1\): Generally Available](#)

The initial release of Employee Workspace is now generally available.

## December 1, 2023 (Package 12.3): Employee Service Site Enhancements

The latest Employee Workspace package provides an enhancement to the Employee Service site functionality. Previously, to navigate, you double-clicked the Service Catalog Categories tab on the Apps page twice.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions.

**Who:** This feature is available to customers with the Employee Productivity Plus permission set license or the IT Service Center - Endpoint Management add-on license.

**How:** This enhancement is automatically available when you upgrade to the latest Employee Workspace package.

SEE ALSO:

[Employee Workspace Installer](#)

## November 30, 2021 (Package 8.4): Enhancements for Employee Workspace Customizations

Streamlined and updated procedures make it easier to customize the Employee Workspace news banner, hero component, and search component.

**How:** Configure your Employee Workspace Customizations using the Digital Experiences app, Experience Builder, and your Employee Workspace site.

SEE ALSO:

[Employee Workspace Customizations](#)

[Customize the News Banner](#)

[Customize the Hero Component](#)

[Add Search to Your Employee Workspace Page](#)

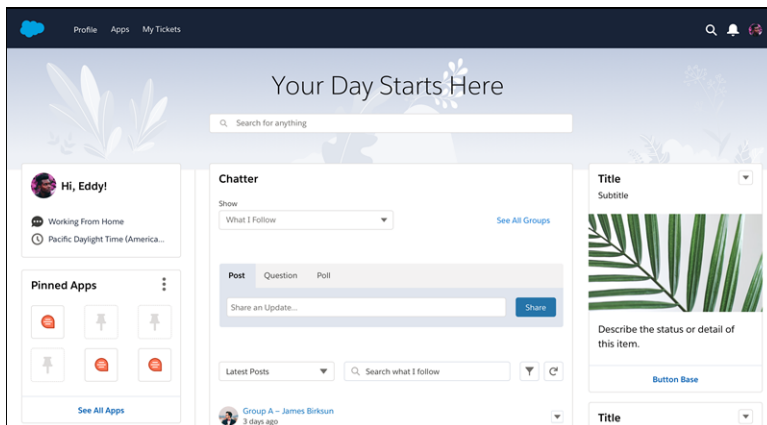
## July 8, 2021 (Package 8.1): Showcase Your Work History with Employee Portfolio

Employee Portfolio gives you and your colleagues a view into everyone's work history and skills.

In your portfolio, you can showcase your past and current work, provide dates for when the work occurred, give descriptions about the work and your role in it, and show any relevant links. You can also add teammates to your portfolio items so your colleagues can see everyone involved in the project.

## March 15, 2021 (Version 2.0, Package 6.1): New Search Components and Support for Overflow Items on Mobile

This update adds the Hero and Search Box components to Employee Workspace. Use the hero component to give your Employee Workspace site a visually striking home base where your users start their day. You can customize the background image and title text of the hero component to fit your brand. Use the search box component to add a convenient global search box anywhere on your site.

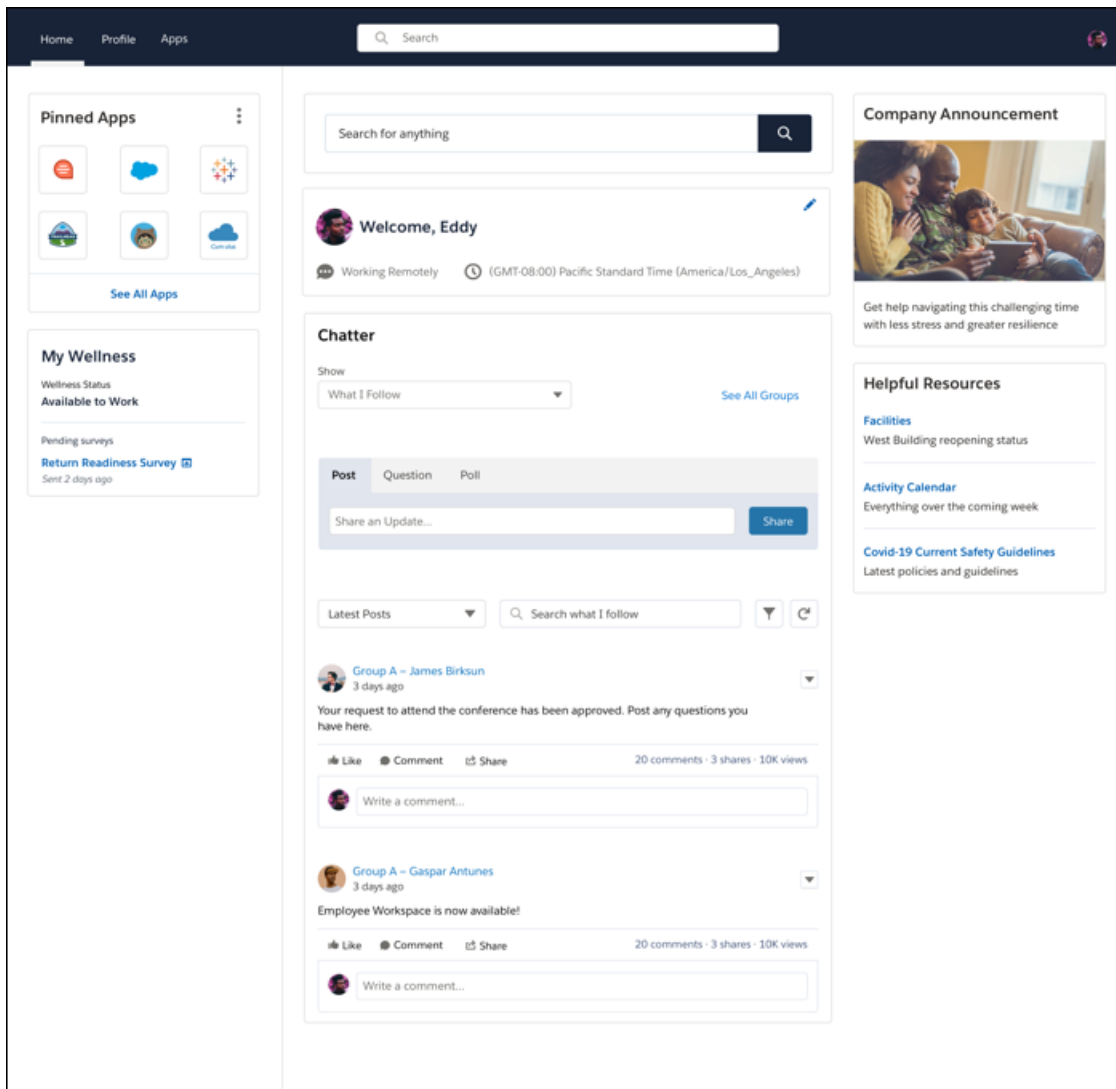


On mobile, adding five or more navigation items to the navigation bar adds an overflow menu to the navigation bar. You can access any additional navigation items through the overflow menu.

Other updates include a minor UI change where the profile widget now appears on the left side of the screen.

## December 15, 2020 (Version 1, Package 5.1): Generally Available

The initial release of Employee Workspace is now generally available.




Employee Workspace admins can set up a community to:

- Create a single place for employees to view and edit information that's important and relevant to them.
- Share company events and communications.
- Manage access to available apps for employees.
- Enable employees to access Employee Workspace from any device, such as a desktop or mobile device.

Employees can use the Employee Workspace community to:

- Collaborate with colleagues in Chatter.
- Access and organize the apps they need to get their job done.
- Stay current with company news.
- Showcase skills and share experiences.
- Manage profile details, such as bio, working hours, and personal information.

- View their current wellness status and respond to the most recent survey.
- Manage their shift schedule.

 **Note: For current Workplace Command Center customers:** Employee Workspace, as a new feature in Workplace Command Center, expands the Workplace Command Center Product Specific Terms to include the following.

*“Notwithstanding the foregoing, Workplace Command Center Services can also be used for the following use cases: personnel administration and/or personnel or workforce collaboration, coordination, and operations.”*

Translated user interface labels in localized versions of Employee Workspace are currently in Beta release status. For a list of supported languages, see the Fully Supported and End-User language lists found in [Salesforce Help: Supported Languages](#).

See [Employee Workspace](#) in Salesforce Help for more information and installation instructions.

## Employee Concierge

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Give your employees the ability to answer questions and solve issues. With Employee Concierge, add a searchable knowledge base and a support ticketing system to your Employee Service site. Designate Knowledge Authors to write articles and IT Agents to manage support tickets. Employee Concierge includes a custom Salesforce app for IT Agents to respond to and resolve tickets.

**Where:** Employee Concierge is available as a managed package for orgs with Employee Workspace. It’s available for Lightning Experience in Enterprise and Unlimited editions.

**Who:** Employee Concierge requires the Employee Experience, IT Agent, Company Communities, Service User, and Knowledge User licenses depending on the profile.

### [Build and Customize Employee Management Solutions](#)

Use Employee Management Solutions to build an employee help desk, ticketing system, and HR management solution directly in Salesforce. Previously, this solutions framework was available only with Employee Service.

### [December 1, 2023 \(Package 12.3\): Employee Service Site Enhancements](#)

The latest Employee Concierge package provides an enhancement to the Employee Service site functionality. Previously, to navigate, you double-clicked the Service Catalog Categories tab on the Apps page twice.

### [August 25, 2022 \(Package 12.1\): Enhance Your Employees’ Service Catalog Experience with Item Search](#)

When employees search the Service Catalog, auto-suggestion provides results in the search bar, and a federated search provides dynamic results across Service Catalog, support tickets, knowledge articles, apps, and portfolios. These enhancements provide your employees a streamlined and automated search experience.

### [July 21, 2022 \(Package 11.2\): Add Shield Encryption for the Account Name and Employee Last Name Fields](#)

Assure your employees that their personal data is secure with Salesforce Shield Encryption. For Employee Concierge, this feature lets you encrypt and hide employee data in the Salesforce CRM and Employee Service community specifically for the Last Name and Account Name fields.

### [July 21, 2022 \(Package 11.2\): Assign Users the Service Catalog Permission Set with a Permission Set Group](#)

Streamline the assignment of the Service Catalog permission set to your company’s users with the ability to use a permission set group.

### [July 7, 2022 \(Package 11.1\): Delete Attachments for Service Catalog Requests](#)

Streamline your employees’ Service Catalog request workflow by letting them delete attachments that they upload to a request.

### [May 5, 2022: Create Support Cases from Emails](#)

Give your employees the ease of submitting support cases in their daily workflow outside of the Employee Service community with Email-to-Case for Employee Concierge.

#### [May 5, 2022: Customize Your Employee Service Site with Custom Components and Experience Cloud Themes](#)

Customize the style, layout, and branding of your Employee Service site with custom components that are compatible with Experience Cloud themes.

#### [January 20, 2022 \(Package 9.2\): Grow Your Organization's Service Capacity with the Employee Service Template](#)

Employee Concierge version 9.2 provides an enhanced employee service capacity that empowers your employees to find answers and solutions to their questions and requests. They can request products and services from any department and submit tickets for dedicated support.

#### [November 30, 2021 \(Package 8.5\): Attach Files to a Ticket, Do More with the My Tickets Page, and Get Better Installation Guidance](#)

Employee Concierge version 8.5 includes the Attachments component and feature enhancements for the My Tickets page. The Employee Concierge installation instructions provide you with improved guidance for Omni-Channel enablement. In addition, we improved the rendering of knowledge articles that are provided as ticket posts or comments.

#### [September 14, 2021 \(Package 8.4\): Restrict Case Feed Visibility, and Feature Availability Updates for the My Tickets Page and Attachments Component](#)

Salesforce admins can restrict the My Tickets page case feed so that it doesn't display internal or sensitive information to Standard Platform Users. In addition, specific components of the My Tickets page are temporarily disabled.

#### [July 8, 2021 \(Package 8.3\): Search More Employee Fields, Attach Files to Tickets, Filter Results on Mobile, and Associate Knowledge Articles to Ticket Categories](#)

Users can now search any Employee field that they have access to, attach files to tickets, use a more optimized mobile interface, and associate knowledge articles with tickets.

#### [May 27, 2021 \(Package 7.1.0\): Omni-Channel for Employee Concierge](#)

To support Omni-Channel case routing with Employee Concierge, Omni-Channel is now automatically enabled for new customers.

#### [March 15, 2021 \(Package 6.4\): Generally Available](#)

The initial release of Employee Concierge is now generally available.

## Build and Customize Employee Management Solutions


Use Employee Management Solutions to build an employee help desk, ticketing system, and HR management solution directly in Salesforce. Previously, this solutions framework was available only with Employee Service.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Service Cloud.

**When:** This feature was released with Service Cloud in Winter '24.

**Who:** This change applies to Service Cloud customers who now have the Employee Management Solutions auto-provisioned which adds the Employee Management and Employee User add-on licenses.

**How:** The Employee Management and Employee User add-on licenses provide you with visibility to the Employee and Internal Organization Unit objects. To use the solution, install the [unmanaged package](#). To use the objects, assign Employee Management and Employee Access permission sets to your users.

 **Important:** Employee Management Solutions is an unmanaged package with public code. It isn't a part of any Salesforce service level agreement. Technical support isn't offered for your use of the package. Use the package and code at your discretion. If you're using Employee Management Solutions in Government Cloud Plus, data can be sent outside the authorization boundary.

SEE ALSO:

[Salesforce Help: Employee Management Solutions](#)

## December 1, 2023 (Package 12.3): Employee Service Site Enhancements

The latest Employee Concierge package provides an enhancement to the Employee Service site functionality. Previously, to navigate, you double-clicked the Service Catalog Categories tab on the Apps page twice.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions.

**Who:** This feature is available to customers with the Employee Productivity Plus permission set license or the IT Service Center - Endpoint Management add-on license.

**How:** This enhancement is automatically available when you upgrade to the latest Employee Concierge package.

SEE ALSO:

[Employee Concierge Installer](#)

## August 25, 2022 (Package 12.1): Enhance Your Employees' Service Catalog Experience with Item Search

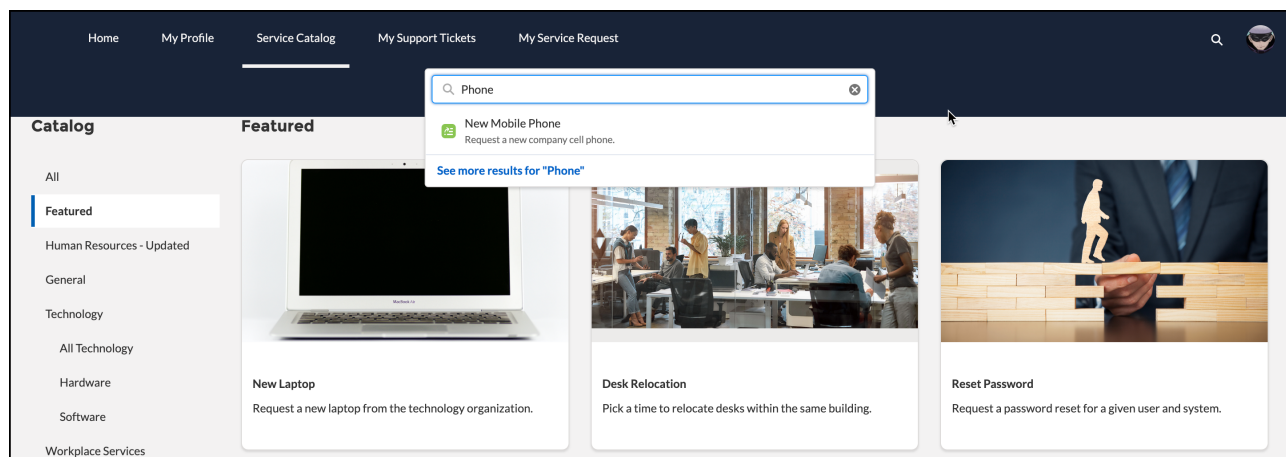
When employees search the Service Catalog, auto-suggestion provides results in the search bar, and a federated search provides dynamic results across Service Catalog, support tickets, knowledge articles, apps, and portfolios. These enhancements provide your employees a streamlined and automated search experience.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions.

**Who:** This feature is available to customers with the Employee Productivity Plus permission set license or the IT Service Center - Endpoint Management add-on license. For customers with the Employee Experience license, the feature applies to support tickets, knowledge articles, apps, and portfolios.

**How:** This feature is automatically enabled when you install or are upgraded to the latest Employee Concierge package.

Here's how the Service Catalog item search looks in your Employee Service site.





## July 21, 2022 (Package 11.2): Add Shield Encryption for the Account Name and Employee Last Name Fields

Assure your employees that their personal data is secure with Salesforce Shield Encryption. For Employee Concierge, this feature lets you encrypt and hide employee data in the Salesforce CRM and Employee Service community specifically for the Last Name and Account Name fields.

**Where:** For Employee Concierge, Salesforce Shield Encryption is available for Lightning Experience in Enterprise and Unlimited editions.

**Who:** This feature is available to customers with the Employee Experience permission set license or Employee Productivity Plus permission set license.

**How:** To set up Salesforce Shield Encryption, go to Platform Encryption in Setup.

SEE ALSO:

[Salesforce Help: Encrypt New Data in Standard Fields](#)

[Salesforce Help: Strengthen Your Data's Security with Shield Platform Encryption](#)

[Salesforce Help: Set Up Your Encryption Policy](#)

## July 21, 2022 (Package 11.2): Assign Users the Service Catalog Permission Set with a Permission Set Group

Streamline the assignment of the Service Catalog permission set to your company's users with the ability to use a permission set group.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions.

**Who:** This feature is available to customers with the Employee Experience permission set license, Employee Productivity Plus permission set license, or the IT Service Center - Endpoint Management add-on license.

**How:** Review the available Employee Service permissions, and then go to Assign Permission Set Groups in Setup.

SEE ALSO:

[Assign Employee Concierge Permissions](#)

[Salesforce Help: Permission Set Groups](#)

[Salesforce Help: Create a Permission Set Group](#)

[Salesforce Help: Add a Single User](#)

[Salesforce Help: Permission Set Licenses](#)

[Salesforce Help: Add Multiple Users](#)

[Salesforce Help: Feature Licenses Overview](#)

## July 7, 2022 (Package 11.1): Delete Attachments for Service Catalog Requests

Streamline your employees' Service Catalog request workflow by letting them delete attachments that they upload to a request.

**Where:** This change applies to the Attachments component of an employees' Service Catalog requests.

**Who:** This feature is available to customers with the Employee Productivity Plus permission set license or the IT Service Center - Endpoint Management add-on license.

**How:** This feature is automatically enabled when you install or are upgraded to the latest Employee Concierge package.

## May 5, 2022: Create Support Cases from Emails

Give your employees the ease of submitting support cases in their daily workflow outside of the Employee Service community with Email-to-Case for Employee Concierge.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions.

**Who:** This feature is available to customers with the Employee Experience permission set license, the Employee Productivity Plus permission set license, or the IT Service Center - Endpoint Management add-on license.

**How:** Use the Email-to-Case Guided Setup Flow from Service Cloud. Then tailor the feature for Employee Concierge with the provided Salesforce Help articles and review the considerations and limitations.

### SEE ALSO:

[Set Up Email-to-Case with a Guided Setup Flow](#)

[Set Up Email-to-Case for Employee Concierge](#)

[Set Your IT Case Page Layout for Email-to-Case Enablement](#)

[Set Your Email-to-Case Support Settings](#)

[Email-to-Case Considerations and Limitations for Employee Concierge](#)

## May 5, 2022: Customize Your Employee Service Site with Custom Components and Experience Cloud Themes

Customize the style, layout, and branding of your Employee Service site with custom components that are compatible with Experience Cloud themes.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions.

**Who:** This feature is available to customers with the Employee Experience permission set license, the Employee Productivity Plus permission set license, or the IT Service Center - Endpoint Management add-on license.

**How:** Review which Employee Service custom components are compatible with the available Experience Cloud templates and themes, and then build and customize your Employee Service site based on your selection.

### SEE ALSO:

[Set Up Your Employee Service Site](#)

[Employee Service Template and Custom Components](#)

[Additional Templates for Your Employee Service Site](#)

[Build Your Employee Service Site](#)

## January 20, 2022 (Package 9.2): Grow Your Organization's Service Capacity with the Employee Service Template

Employee Concierge version 9.2 provides an enhanced employee service capacity that empowers your employees to find answers and solutions to their questions and requests. They can request products and services from any department and submit tickets for dedicated support.

**Why:** The components and pages of the Employee Service Template provide advanced Employee Concierge service capacity in your Employee Workspace Community.

Employee Concierge now supports advanced service capacity for your organization with the general availability of Service Catalog. You can now support out-of-the-box workflows across departments such as IT and HR to automate employee requests for IT hardware and software and employee onboarding.

These functionalities are available with the addition of several Service Catalog components and pages to your Employee Workspace site. The components and pages are available in the new Employee Service Template for new installers and as new features available to existing Employee Workspace Communities. Extend your Employee Workspace site with Service Catalog components and pages to provide greater Employee Concierge service capacity and empower your employees to:


- Order IT hardware and software from the Service Catalog page.
- Open, review, and track employee service requests and request-related items on the My Service Catalog Requests Page.
- Open, review, and track employee support tickets by using the My Support Tickets page.
- View featured Catalog items directly from your Employee Workspace site home page.
- Review and track updates quickly for open support tickets and Service Catalog requests from your Employee Workspace site home page.

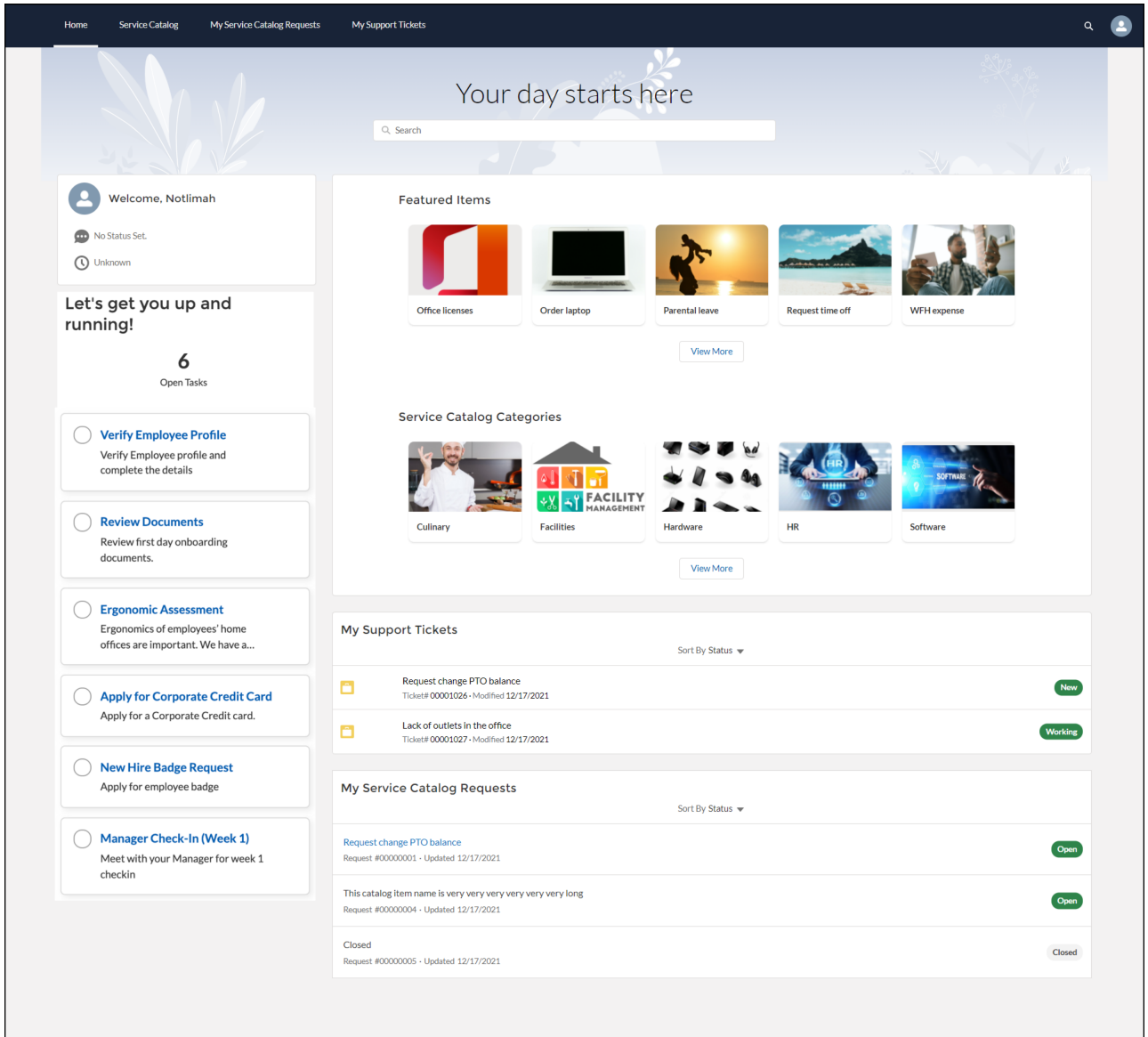
**How:** To set up the Employee Service Template for new installers or set up the Service Catalog components and pages for existing Employee Workspace Communities, ensure that you meet these requirements.

- Service Catalog is enabled in your org.
- The Employee Productivity Plus permission set license or ITSC Endpoint Add-on is enabled in your org.

In Employee Concierge version 9.2, the Employee Concierge installation process sets up the Service Catalog pages and components in your Employee Workspace site.

If you have an Employee Concierge version earlier than version 9.2, use the associated Help guidance and Digital Experiences site builder to set up the Service Catalog components and pages in your Employee Workspace site.

 **Example:** The Employee Service Template provides this layout in your Employee Workspace site.



## November 30, 2021 (Package 8.5): Attach Files to a Ticket, Do More with the My Tickets Page, and Get Better Installation Guidance

Employee Concierge version 8.5 includes the Attachments component and feature enhancements for the My Tickets page. The Employee Concierge installation instructions provide you with improved guidance for Omni-Channel enablement. In addition, we improved the rendering of knowledge articles that are provided as ticket posts or comments.

### Attach files to a ticket with the restored Attachments component

The Attachments component is available again for the My Tickets Page with these enhancements:

- Attachments added to ticket posts or comments in the Employee Workspace Community render in the attachments section of the My Tickets page and as a thumbnail icon in the post. In the CRM, attachments uploaded by service agents are private and are not visible to Employees in the Employee Workspace Community.
- The user who uploaded an attachment to a ticket post or comment in the Employee Workspace Community can delete the attachment. In the CRM, service agents can delete attachments uploaded by employees in addition to their own attachments.
- The name and file type displays for each attachment uploaded to a ticket post or comment.
- You can attach knowledge articles to a ticket, which render in the Employee Workspace home page and the My Tickets page.

### Do more with the My Tickets page

The My Tickets page contains these enhancements:

- The user who creates a ticket post can delete it if it has no comments.
- The user who creates a comment on a ticket post can delete it.
- Improved support for inserting HTML, hyperlinks, and URLs in ticket posts or comments.
- You can track updates and changes to a ticket in the home page ticket feed and the My Tickets page.
- You can access feed tracking for any Case object field that the user can access, based on your Field Level Security settings.

### Get better installation guidance for Employee Concierge

The installation procedure for Employee Concierge provides improved guidance for enabling Omni-Channel routing for the Case object. Follow the updated guidance if you installed Employee Concierge before version 8.5 and chose to enable Omni-Channel case routing. Omni-Channel routing is automatically enabled for new customers installing Employee Concierge version 8.5.

### Rendering enhancements for Knowledge article links inserted within ticket posts

Knowledge article links provided as a ticket post or comment render on both the Employee Workspace home page and the My Tickets page.

#### SEE ALSO:

- [Optimize Ticket Attachments with the Attachments Component](#)
- [Add an Attachments Component to the My Support Tickets Page](#)
- [Add a My Support Tickets Page to Your Employee Service Site](#)
- [Install the Employee Concierge Package](#)
- [Salesforce Help: Omni-Channel](#)

## September 14, 2021 (Package 8.4): Restrict Case Feed Visibility, and Feature Availability Updates for the My Tickets Page and Attachments Component

Salesforce admins can restrict the My Tickets page case feed to so that it doesn't display internal or sensitive information to Standard Platform Users. In addition, specific components of the My Tickets page are temporarily disabled.

### Restrict the visibility of sensitive information within the My Tickets Page case feed

In the Employee Concierge Community and CRM app, admins can restrict internal or sensitive information from being shown in the My Tickets page case feed for Standard Profile Users.

### The Attachments Component for the My Tickets Page is temporarily unavailable

Employee Concierge version 8.3 gave employees the ability to attach files when creating a ticket or editing a list of files attached to an existing ticket. However, we removed this feature while we make improvements. If it's installed, it must be removed.

**Support of inline images to comments or posts from Agent Desk is temporarily unavailable**

Adding inline images to a new ticket post or updating an existing ticket post from the Agent Desk currently isn't supported. When creating or updating a ticket post in the Agent Desk, support agents must upload images by clicking the paper clip icon. We're working on providing support for this feature.

**Attaching knowledge articles in a ticket post isn't supported**

Knowledge articles that are attached to ticket posts don't surface in the case feed. Instead, insert the URL of the knowledge article directly in your ticket post. We're working on addressing this issue.

**Knowledge article links inserted within ticket posts open in the CRM for employees**

Links to knowledge articles added to a ticket comment don't open in the Employee Workspace community on the employee side. Instead, the knowledge articles open in the CRM. We're working on addressing this issue.

## SEE ALSO:

[Employee Case Feed Access and Visibility Solutions](#)

[Optimize Ticket Attachments with the Attachments Component](#)

[Agent Desk Considerations](#)

## July 8, 2021 (Package 8.3): Search More Employee Fields, Attach Files to Tickets, Filter Results on Mobile, and Associate Knowledge Articles to Ticket Categories

Users can now search any Employee field that they have access to, attach files to tickets, use a more optimized mobile interface, and associate knowledge articles with tickets.


**Search on More Employee fields**

Users can now search across any fields that they have access to. Previously, users could only search first name and last name.

**Add, View, and Manage Files Attached to New or Existing Tickets**

Employees can now attach files when creating tickets. They can also review and edit a list of attachments for a ticket on their My Tickets page.

There's no limit to the number of files employees can attach to a ticket. Employees can upload up to 10 files at a time.

 **Important:** If you deployed Employee Concierge using package version 7 or earlier, you can make a minor update to get the full benefit of ticket attachments. If you deployed Employee Concierge using version 8 or later, no action is needed. See Salesforce Help to find out how to update your My Tickets page and the IT Case Page Layout to optimize ticket attachments.

**Work More Efficiently with Optimized Mobile Layout**

Users now have better usability and readability on mobile devices with enhancements to search features and screen optimization.

Easily filter tickets by status on mobile devices with the new horizontally scrolling filter ribbon. They apply subfilters to narrow the search. The search function now mimics the desktop experience.

Find answers and file tickets more efficiently now that Knowledge Articles no longer have extensive margins and the New Ticket button is centrally located.

**Associate Knowledge Articles to Ticket Categories**

The field AssociatedKnowledgeArticleTypeMapping has been added to Employee Concierge. This field contains a comma-separated list of the knowledge articles that are associated with a ticket category. If you deployed Employee Concierge using package version 7 or earlier, you must manually add the AssociatedKnowledgeMapping field to the Ticket Category Definition page layout.

To associate a knowledge article to a ticket category, you must map a knowledge article record type to a single ticket category. When knowledge article record types are added to the AssociatedKnowledgeMapping of one of the ticket categories, the New Ticket button appears on the associated Knowledge Articles.

Clicking New Ticket from a knowledge article pre-populates the ticket category with the ticket category that the knowledge article record type is associated with. Associate one knowledge article record type with only one ticket category.

#### SEE ALSO:

[Salesforce Help: Update Your My Tickets Page and the IT Case Page Layout to Optimize Ticket Attachments](#)

## May 27, 2021 (Package 7.1.0): Omni-Channel for Employee Concierge


To support Omni-Channel case routing with Employee Concierge, Omni-Channel is now automatically enabled for new customers.

Existing customers who already have the Employee Concierge package installed have to manually enable Omni-Channel. If case routing is going to be used, existing customers must also create an Apex trigger to facilitate proper case sharing.

To enable Omni-Channel:

1. From Setup, in the Quick Find box, enter *Omni-Channel*, and then select **Omni-Channel Settings**.
2. Select **Enable Omni-Channel**.

To create the Apex trigger:

1. Click the quick access menu (  ) and open the Developer Console.
2. Open the File menu and create an Apex Trigger.
3. Name the trigger AgentWorkTrigger
4. Select Agent Work for the sObject
5. Click Submit
6. Paste in this code:

```
trigger AgentWorkTrigger on AgentWork(after insert, after update)
{
    wkdw.AgentWorkTriggerHandlerGlobalProxy.handleTrigger (
        Trigger.newMap,
        Trigger.oldMap,
        Trigger.operationType
    );
}
```

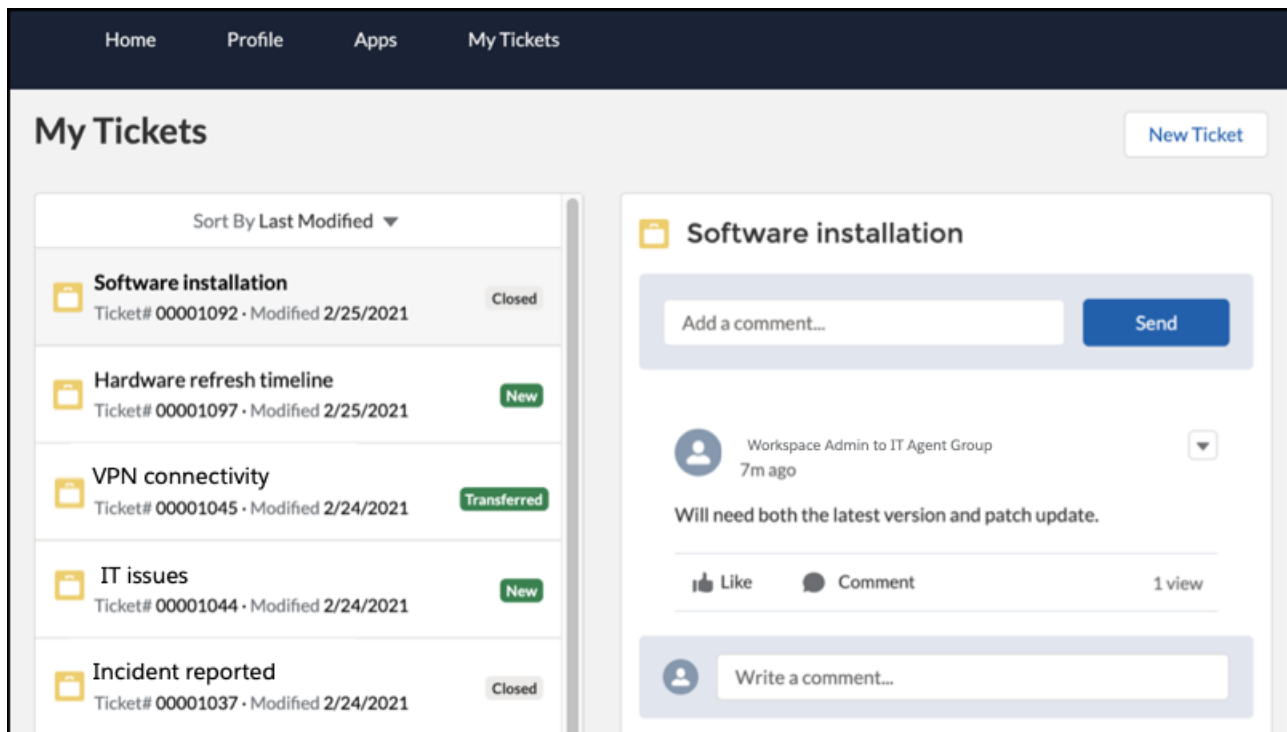
7. Open the File menu and click Save.

## March 15, 2021 (Package 6.4): Generally Available

The initial release of Employee Concierge is now generally available.

With Employee Concierge, employees can access a knowledge base and ticketing system from your Employee Workspace Experience Cloud site. Your designated IT Agents and Knowledge Authors write Knowledge articles, so the information can address the most common questions and requests. If employees can't resolve an issue through a knowledge article, they can open a support ticket to ask for help. Employees can also view, update, and comment on their tickets, including those tickets created for them by IT Agents. Your IT

Agents manage and resolve employee tickets using Agent Desk, a Salesforce Lightning app that's added when you install Employee Concierge.



See [Employee Concierge](#) in Salesforce Help for more information and installation instructions.

### New and changed items for developers

#### Define the data mapping that associates employee data with support ticket data in person account records

To associate employee data with support tickets, Employee Concierge uses person accounts. The custom metadata type `wkwd__EmployeeToPersonAccountFldMap__mdt` maps data from the employee records to person account records.

[Employee Concierge for Work.com Developer Guide: wkwd\\_\\_EmployeeToPersonAccountFldMap\\_\\_mdt](#)

#### Create custom support ticket categories to define unique fields and page layouts and to route tickets to specific support agent queues

Use the new `wkwd__TicketCategoryDefinition__mdt` custom metadata type.

[Employee Concierge for Work.com Developer Guide: wkwd\\_\\_TicketCategoryDefinition\\_\\_mdt](#)

#### Add categories that users can choose from when creating support tickets

Use the new `wkwd__TicketCategory__c` custom field on the Case standard object.

[Employee Concierge for Work.com Developer Guide: Case](#)

## Employee Concierge Bot

Give your employees concise answers to quick questions with a chatbot integrated into Employee Concierge.

**Where:** Employee Concierge Bot is available as an unmanaged package for orgs with Employee Concierge. It's available for Lightning Experience in Enterprise and Unlimited editions.

**Who:** Employee Concierge Bot requires the Employee Productivity Plus license, depending on the profile.



[July 15, 2021 \(Package 8.3\): Generally Available](#)

The initial release of Employee Concierge Bot is now generally available.

## July 15, 2021 (Package 8.3): Generally Available

The initial release of Employee Concierge Bot is now generally available.

Your designated IT Agents and Knowledge Authors write Knowledge articles, so the information can address the most common questions and requests. Employee Concierge Bot connects your employees with those Knowledge articles, to get frequently asked questions answered automatically. Employee Concierge Bot also provides your employees with the ability to create tickets, verify the status of existing tickets, or communicate with a live agent about case statuses.

Employee Workspace and Employee Concierge must be installed before you can use Employee Concierge Bot. Employee Concierge Bot isn't available on mobile.

SEE ALSO:

[Salesforce Help: Employee Concierge Bot](#)


## IT Service Center

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Drive proactive resolutions and faster remediation of IT cases with the IT Service Center. Enable IT Agents to accelerate case resolution by using AI-powered productivity tools and real-time endpoint visibility and control powered by Tanium.

**Where:** IT Service Center is available as a managed package with Employee Workspace. IT Service Center is available in Lightning Experience in Enterprise and Unlimited editions.

**Who:** IT Service Center is available as an add-on license.

 **Important:** The documentation that is available at the following link is written and provided by Tanium, Inc. and is not Salesforce Documentation, as that term is defined in your Main Services Agreement. Your use of this Tanium documentation, as well as the Tanium Non-SFDC Applications to which this documentation pertains, is subject to Tanium's Subscription Agreement available at [tanium.com/taas-subscription-agreement/](https://tanium.com/taas-subscription-agreement/). Salesforce does not warrant the accuracy of and is not responsible for this Tanium documentation.

[November 3, 2022 \(Version 1.36\): CMDB on Salesforce, Network Discovery, and Employee Assets](#)

Import assets from any discovery tool into the CMDB on Salesforce. Configuration managers can create relationships between any types of assets, whether they're managed Tanium records or created from another source. Import network-discovered assets and assign assets to specific employees for automatic association with incidents and requests.

[March 03, 2022 \(Version 1.24\): Create Announcements, Associate Live Configuration Items, and Automate IT Requests](#)

Use scheduled announcements to notify employees and agents about issues or events. Scheduled announcements are displayed in the community or agent console. Agents can associate online configuration items with cases by building live questions to directly query the corresponding Tanium tenant. Templates and automations streamline the process of delivering services and requests.

[November 15, 2021 \(Version 1.20\): Import Configuration Items, Identify Dependencies, View Related Cases, and Communicate on Major Incidents](#)

Manage custom configuration items (CIs) with the new Configuration Item Uploader tool. You can view connections and mappings between endpoints, applications, and services. Agents can diagnose and resolve issues more quickly with suggested related incidents, problems, and changes. Incident teams can collaborate and notify stakeholders about ongoing developments with the new major incident scope and communication hub.

[July 8, 2021 \(Version 1.17\): Synchronize Configuration Management Database Data, Track Major Incidents, Create Calendar Events, Manage Risk for Change Cases, and Create Case Templates](#)

This update includes Configuration Management Database (CMDB) capabilities that pull live data from Tanium. Create major incidents so you can track and quickly resolve large outages or disruptions. New risk score calculations help change managers focus on changes that have the greatest impact.

[March 15, 2021 \(Version 1.6\): Generally Available](#)

The initial release of Employee Concierge is now generally available.

## November 3, 2022 (Version 1.36): CMDB on Salesforce, Network Discovery, and Employee Assets

Import assets from any discovery tool into the CMDB on Salesforce. Configuration managers can create relationships between any types of assets, whether they're managed Tanium records or created from another source. Import network-discovered assets and assign assets to specific employees for automatic association with incidents and requests.

The screenshot displays the CMDB on Salesforce interface. At the top, there is a table of assets with columns for Asset N., Manufacture, Model, Operating, Serial Num., and Primary As. Below this, a detailed view of an asset (00:0C:29:89:68:A6) is shown, including its record type (Tanium Discover CI), assigned employee (Tan Employee), serial number (c100-x3424), status (In Use), and location (HQ-2). The 'CI Relationships' section shows a peer-to-peer relationship with three other assets. On the right, an 'Announcement Details' panel is visible, containing text about ongoing VPN issues affecting remote employees and a world map with red dots indicating affected locations.

### CMDB on Salesforce

Store all assets and relationships directly in Salesforce. Create custom record types, classes, fields, layouts, and relationship types using the native Object Manager in Salesforce.

### Network Discovery

Discover and automatically import any device with an IP address into the CMDB, including network devices, IoT devices, and other nonmanageable assets.

### Employee Assets

Assign one or more assets to an employee and allow employees to select their primary device for automatic association with new incidents and requests.

### Change CAB Events on Calendar

Schedule and track Change Advisory Board (CAB) meetings for requested changes by adding CAB events to change calendars.

### Enhanced Announcements

Provide rich text details and custom fields on announcements for employees and agents.

### Module-Based Reporting

View module-based reports to get specific key performance indicators (KPIs) for incidents, problems, and changes.

### Notification Templates

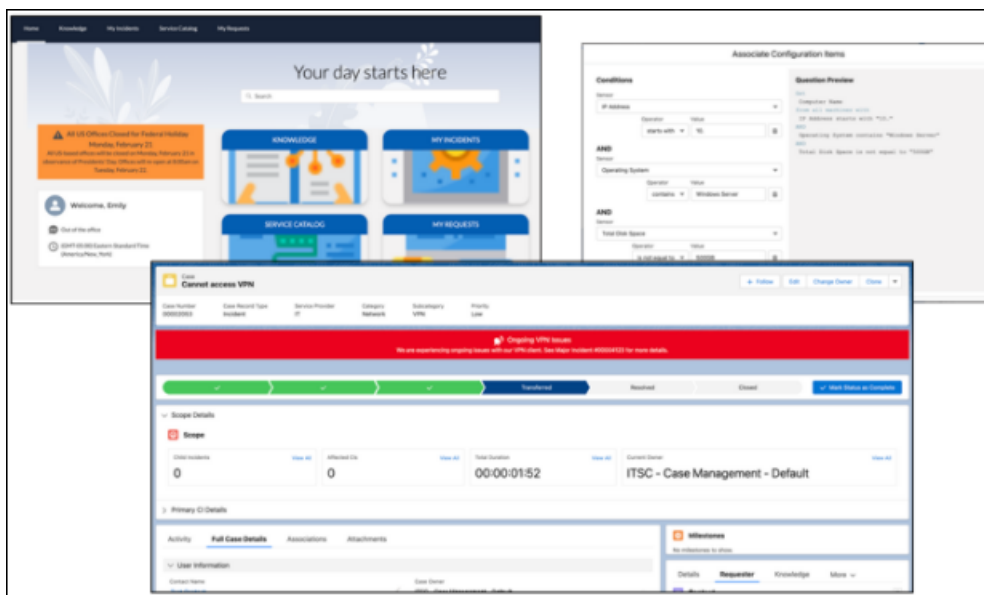
Streamline your email notifications for employees, agents, and approvers with additional preconfigured email templates.

### Flow Automation Templates

Create announcements from problem records, share case visibility during queue ownership changes, and pause entitlement processes automatically.

## March 03, 2022 (Version 1.24): Create Announcements, Associate Live Configuration Items, and Automate IT Requests

Use scheduled announcements to notify employees and agents about issues or events. Scheduled announcements are displayed in the community or agent console. Agents can associate online configuration items with cases by building live questions to directly query the corresponding Tanium tenant. Templates and automations streamline the process of delivering services and requests.



### Employee and Agent Announcements

Create and schedule announcements for display in the employee community or agent console. Preconfigured, flexible announcement components are color-coded to distinguish between info, warning, and alert announcements.

### Live Configuration Item Associations

Query online configuration items based on filtered sensors such as IP address, operating system, domain name, and disk space. Select configuration items to associate them with related cases, such as major incidents and changes.

### Live Question Builder

Search, select, and associate online configuration items with a live query builder. This query builder returns the same question format and results as the Tanium console.

### IT Request Automations

Use case templates, dynamic field capabilities, and packaged subflows to automate employee requests and deliver the highest levels of service.

### Case Source Tracking

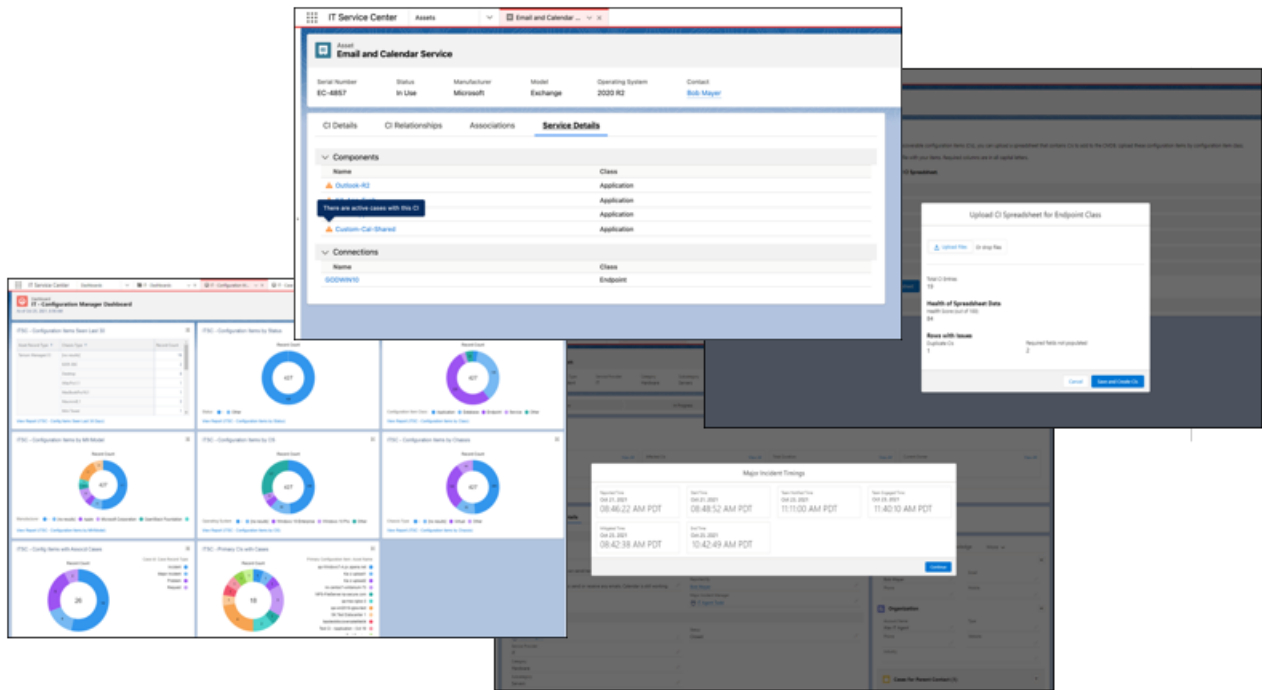
Automatically track the source of cases that were created directly from another case or template. Analyze how often case templates are being used, and quickly investigate the originating incidents that led to problems and changes.

### Simplified Settings Page Layout

Simplified settings page reorganization separates configurations between initial setup, CMDB jobs, and ITSC-specific functions such as case timings and configurations.

## November 15, 2021 (Version 1.20): Import Configuration Items, Identify Dependencies, View Related Cases, and Communicate on Major Incidents

Manage custom configuration items (CIs) with the new Configuration Item Uploader tool. You can view connections and mappings between endpoints, applications, and services. Agents can diagnose and resolve issues more quickly with suggested related incidents, problems, and changes. Incident teams can collaborate and notify stakeholders about ongoing developments with the new major incident scope and communication hub.



### Import and Update CIs

Upload CIs that aren't automatically discovered and managed by Tanium with the Configuration Item Uploader tool. Health scoring provides insight into your CI data before you import.

### View Relationships and Dependencies Between Endpoints, Applications, and Services

View the inbound, outbound, and peer-to-peer connections between endpoints and application services. Track the components and connections that power a service.

### **Explore Related Cases**

View suggested cases based on similar descriptions, categorization, and resolutions with Service and Remediation Insight.

### **Communicate Major Incident Dates and Lifecycles**

Use the Major Incident Scope to track important dates and times in the lifecycle of a major incident. With the communication hub, agents can run configurable actions within major incidents that trigger flows to notify stakeholders and open communication with team members.

### **View New Dashboards and Reports**

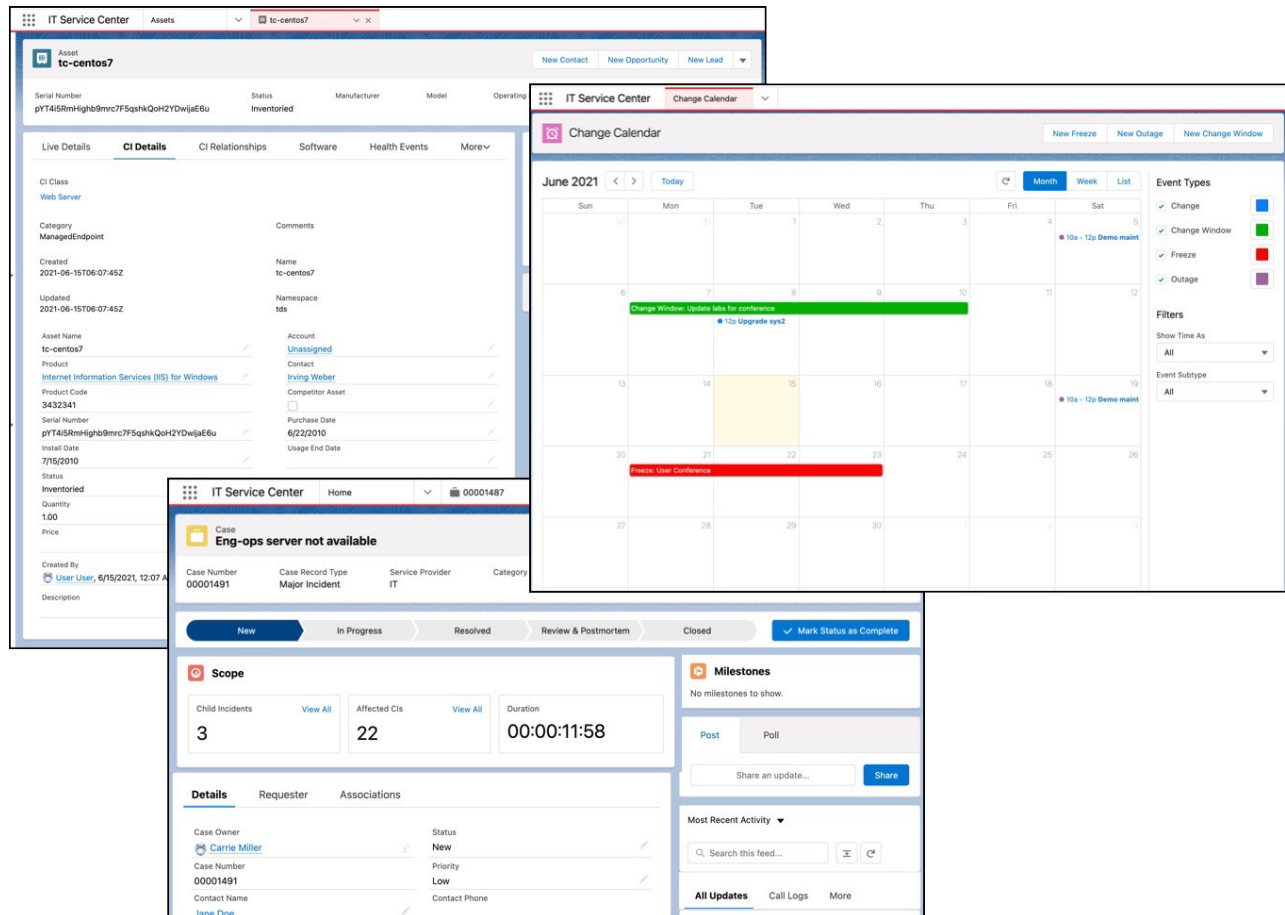
Get summary information for cases or configuration items with case management and configuration item management dashboards. Dozens of new reports are available.

### **Track and Audit Custom Fields**

Add custom fields to existing CI Classes to track information that is important to your organization. Use audit tracking to show the history of changes made to tracked fields.

## **July 8, 2021 (Version 1.17): Synchronize Configuration Management Database Data, Track Major Incidents, Create Calendar Events, Manage Risk for Change Cases, and Create Case Templates**

This update includes Configuration Management Database (CMDB) capabilities that pull live data from Tanium. Create major incidents so you can track and quickly resolve large outages or disruptions. New risk score calculations help change managers focus on changes that have the greatest impact.



### Track and Sync Configurable Items in the Configuration Management Database

Track configurable items (CI) as standardized and individual items in the CMDB with nested fields and values that can have relationships. Including CI information streamlines case resolution as it helps to identify the effects of changes, root causes, change governance, compliance, resource optimization, and lifecycle management.

### Minimize Disruptions with Major Incidents

Track tickets for a major loss or disruption of operations, services, or functions with Major Incidents. You can streamline notifying, coordinating, and deploying resources to minimize disruptions.

### Visualize Changes with Calendar Events

Use the change calendar to visualize scheduled changes such as freezes, change windows, and outages. When you make a change, the planned times are checked against the calendar to verify that no conflicts exist with other work that's happening.

### Manage Risk for Change Cases with Risk Score

Help decision making about potential risk by making a change with customized risk score calculations for a change case. Change managers can focus their analysis on high-risk changes and quickly authorize low-risk changes.

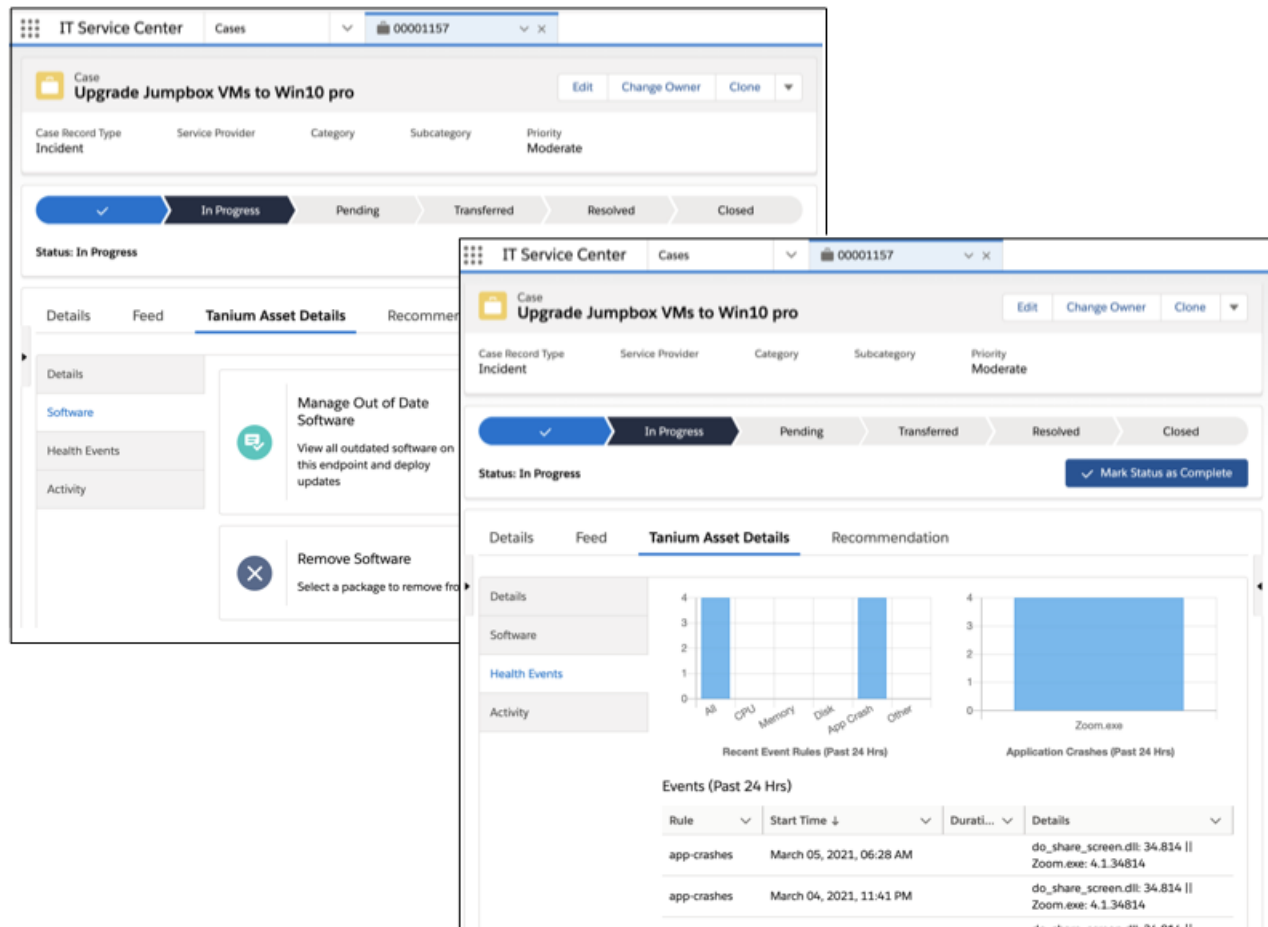
### Improve Efficiency with Case Templates

Define case templates to speed up work for repeatable processes such as monthly system updates.

## March 15, 2021 (Version 1.6): Generally Available

The initial release of Employee Concierge is now generally available.

With the IT Service Center, your IT agents can manage the full lifecycle of incidents, problems, and changes. They can view live asset data and take action on incidents before they impact business operations. Your agents can also see a complete inventory of currently installed software and then update, install, or uninstall software packages with a few clicks. And they can use this knowledge to automate common issues powered by real-time, accurate data.



See [IT Service Center](#) for more information and installation instructions.

## HR Service Center

Connect and simplify your employee HR management system and easily build processes for employee onboarding with HR Service Center.

**Where:** HR Service Center is available as a managed package. HR Service Center is available in Lightning Experience in Enterprise and Unlimited editions.

**Who:** HR Service Center is available as an add-on license.

### [November 3, 2022 \(Package 5.10\): Guide Employees Through Work-Life Events with Employee Transitions](#)

Employee Transitions automates the HR tasks for transition events from onboarding to retirement. Use this feature to easily streamline and complete transition events from their initiation by an HR agent to completion by an employee.

[July 21, 2022 \(Package 4.6\): Get Version 4.6 of HR Service Center for New Installers](#)

The HR Service Center version 4.6 managed package is available for first-time installers. It improves the installation process and contains the latest features released with the HR Service Center version 4.5 managed package.

[February 15, 2022 \(Version 4.5\): Add HR Service Center Service Catalog Items](#)

Streamline your HR service delivery with sample HR Service Catalog items and a fulfillment flow.

[November 17, 2021 \(Version 3.0\): Streamline Onboarding with Mass Quick Actions, Add Flows to Knowledge Articles, And More](#)

Efficiently manage your HR tasks with mass quick actions that assign onboarding tasks to multiple employees at once. Then customize your settings to hide or continue to display tasks when they are complete. Support employees with the ability to launch topic-relevant flows directly from knowledge articles.

[Sept. 17, 2021 \(Version 2.0\): Connect to Workday, Confirm Employees' Health Status, and More](#)

Streamline your HR management by connecting HR Service Center to Workday. Use three new sample flows to let employees provide proof of their COVID-19 status, check their Workday PTO balance, and verify their Workday direct deposit settings. Enjoy new features in the Employee Onboarding Tasks and Welcome Task components. And, use our sample knowledge articles as templates to create your own articles for employees.

[July 15, 2021 \(Version 1.0\): Generally Available](#)

New to the Work.com suite of solutions, HR Service Center complements a unified employee experience platform to support a hybrid workforce.

## November 3, 2022 (Package 5.10): Guide Employees Through Work-Life Events with Employee Transitions

Employee Transitions automates the HR tasks for transition events from onboarding to retirement. Use this feature to easily streamline and complete transition events from their initiation by an HR agent to completion by an employee.

**Where:** This feature is available for Lightning Experience in Enterprise and Unlimited editions.

**Who:** The feature is available to customers with the Employee Productivity Plus permission set license.

**Why:** The Employee Transitions feature replaces Employee Onboarding. This feature extends your HR department's onboarding capabilities to support the orchestration of several transition events across your business departments: The Employee Transitions framework provides you flexibility to customize a transition event for an employee's particular needs or standardize transition events for specific business departments.

- Onboarding
- Relocation
- Promotion
- Job change
- Leave of absence
- Termination
- Offboarding



**How:** To set up Employee Transitions, head to Salesforce Setup to configure your object and employee record page layouts and set your HR Service Center custom settings. Then, from the HR Service Center app, create and assign transition plan templates and tasks to employees. The setup steps are required for all HR Service Center installers.

SEE ALSO:

[Salesforce Help: Install the HR Service Center Packages](#)

[Salesforce Help: Employee Transitions](#)

[Custom Objects and Fields Used by Work.com and Employee Service](#)

[Employee Service Developer Documentation: Task](#)

[Employee Service Developer Documentation: Onboarding Task](#)

[Employee Service Developer Documentation: Onboarding Template](#)

[Employee Service Developer Documentation: Onboarding Template Task](#)

[Employee Service Developer Documentation: Transition Plan](#)

## July 21, 2022 (Package 4.6): Get Version 4.6 of HR Service Center for New Installers

The HR Service Center version 4.6 managed package is available for first-time installers. It improves the installation process and contains the latest features released with the HR Service Center version 4.5 managed package.

**Why:** The HR Service Center version 4.6 managed package is available only for first-time installers of HR Service Center. HR Service Center customers with version 4.5 installed have the latest managed package and features.

**How:** For new installers, [install the HR Service Center packages](#). Customers who received a push upgrade to version 4.5 of the managed package don't have any action to take.

SEE ALSO:

[February 15, 2022 \(Version 4.5\): Add HR Service Center Service Catalog Items](#)

## February 15, 2022 (Version 4.5): Add HR Service Center Service Catalog Items

Streamline your HR service delivery with sample HR Service Catalog items and a fulfillment flow.

Install Version 4.5 of the HR Service Center Managed Package

- For New HR Service Center Customers

[Install the HR Service Center Packages](#) in Salesforce Help.

- For Existing HR Service Center Customers

If version 3.3 of HR Service Center is already installed in your org, the managed package is upgraded to version 4.5 automatically on the release date.

After HR Service Center is upgraded to version 4.5, you can receive more essential features by upgrading the HR Service Center Metadata package. You can choose to upgrade the package or not, but be sure to keep a few considerations in mind.

If you don't upgrade to the latest HR Service Center Metadata package, these updates for existing permission sets aren't included in your org:

- For the Employee Productivity Plus User Data Access permission set, granting of access to `Employee.StatusAsOf`.
- For the Employee Service Agent User Data Access permission set:
  - Granting of RunFlow permissions.
  - Granting of access to the `wkdw__StartDayOffset__c` and `wkdw__Description__c` fields on the `OnboardingTask` object.
  - Granting of access to `Employee.UserId`.

If you upgrade to the latest HR Service Center Metadata package, the system reverts any configurations that you made to the HR Service Center App. Ensure that you review your configuration in Setup.

To upgrade the HR Service Center Metadata package, follow these steps.

1. [Upgrade](#) the HR Service Center Metadata package.
2. Configure your case list views so they continue to work as expected.
  - i. From the HR Service Center app, go to the Cases tab.
  - ii. Select the list view **HR - Benefits**.
  - iii. To edit the list view filters, click the filter icon.
  - iv. Change the Filter by Owner field to Queue owned cases and select the corresponding queue.  
For example, for this list view, select **HR - Benefits queue**.
  - v. Repeat the steps for all six HR Service Center Service Catalog standard list views.

- Service Catalog for HR Service Center

Customize and streamline several HR services with the Sample HR Service Catalog items and a fulfillment flow included in this release.

- Manage Data Collection

Salesforce collects anonymous data to understand product use. You can opt out in Setup.

SEE ALSO:

[Install HR Service Center Package](#)

[Customize HR Service Center Service Catalog Item Samples](#)

[Configure HR Service Center Data Collection](#)

## November 17, 2021 (Version 3.0): Streamline Onboarding with Mass Quick Actions, Add Flows to Knowledge Articles, And More

Efficiently manage your HR tasks with mass quick actions that assign onboarding tasks to multiple employees at once. Then customize your settings to hide or continue to display tasks when they are complete. Support employees with the ability to launch topic-relevant flows directly from knowledge articles.

Get Version 3.0—For New HR Service Center Customers

Install the HR Service Center managed package and, optionally, the Employee Health Verification managed package. For instructions, see [Install the HR Service Center Packages](#) in Salesforce Help.

For Existing HR Service Center Customers—If version 2.0 of HR Service Center is already installed in your org, the managed package is upgraded to version 3.0 automatically on the date of release. After it upgrades, follow these steps to get other essential version 3.0 features.

1. Upgrade the [HR Service Center Metadata unlocked package](#).
2. Update your case list views so they continue to work as expected.
  - a. From the HR Service Center app, go to the Cases tab.
  - b. Select the list view named HR - Benefits.
  - c. Click the filter icon to edit the list view filters.
  - d. Change the Filter by Owner field to Queue owned cases and select the corresponding queue. For example, for this list view, select the HR - Benefits queue.
  - e. Repeat these steps for all six HR Service Center standard list views.

Assign Onboarding Tasks to Multiple Employees at Once—Streamline your onboarding process by assigning tasks to multiple employees with a single click.

Launch Flows Directly from Knowledge Articles—Add relevant flows directly to knowledge articles so employees can easily initiate related processes.

Customize Onboarding Task Fields—Create display names and descriptions for fields in the employee onboarding task. Prioritize the sort order of an onboarding task within a particular date.

Display or Hide Completed Onboarding Tasks—When an employee completes an onboarding task, they can check Show Only Pending Tasks to hide the task from their onboarding task list.

New Case FlexiPage and Page Layout—We've added a Case FlexiPage and page layout in your org. Configure it for your HR Service Agents.

Protect User Health Data with Separate Sharing Settings—To limit who can see and edit health data, we've made our default org-wide sharing setting for the Health Verification object Private. If your org already uses the Health Verification package, we recommend that you update your sharing settings. Additionally, we've created the Onboarding Health Verification Agent Access and Onboarding Health Verification Employee Access permission sets to control who can read and edit the Health Verification object.

- New items for developers
  - HR Services provides custom objects for developers to create onboarding tasks and templates.
  - Link Articles to Flows with the `wkdw__articletoflowlink__c` object.

## Sept. 17, 2021 (Version 2.0): Connect to Workday, Confirm Employees' Health Status, and More

Streamline your HR management by connecting HR Service Center to Workday. Use three new sample flows to let employees provide proof of their COVID-19 status, check their Workday PTO balance, and verify their Workday direct deposit settings. Enjoy new features in the Employee Onboarding Tasks and Welcome Task components. And, use our sample knowledge articles as templates to create your own articles for employees.

Get Version 2.0

- For New HR Service Center Customers—Install the HR Service Center managed package and, optionally, the Employee Health Verification managed package. For instructions, see [Install the HR Service Center Packages](#) in Salesforce Help.

- For Existing HR Service Center Customers—If version 1.0 of HR Service Center is already installed in your org, the managed package is upgraded to version 2.0 automatically on the date of release. After it upgrades, follow these steps to get other essential version 2.0 features.
  1. Optionally, install the Employee Health Verification managed package. For instructions, see [Install the HR Service Center Package](#) in Salesforce Help.
  2. Visit this link to upgrade the HR Service Center Metadata unlocked package:  
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4R000001VUbOQAW>
  3. Assign the Onboarding Health Verification permission set to all HR Service Center personas who need it. For instructions, see [Assign HR Service Center Permissions](#) in Salesforce Help.
  4. Update your case list views so they continue to work as expected.
    - i. From the HR Service Center app, go to the Cases tab.
    - ii. Select the list view named **HR - Benefits**.
    - iii. Click the filter icon to edit the list view filters.
    - iv. Change the Filter by Owner field to **Queue owned cases** and select the corresponding queue. For example, for this list view, select the HR - Benefits queue.
    - v. Repeat these steps for all six HR Service Center standard list views.

#### Streamline Onboarding and Verify COVID-19 Status with New Sample Flows

- The “Workday Time Off Balance” sample flow lets employees check their paid time off balance in Workday.
- The “Verify Direct Deposit in Workday” sample flow lets employees confirm that they set up direct deposit correctly in Workday.
- The “Health Verification” sample flow lets employees provide proof of their COVID-19 status—for example, by uploading an image of their vaccination card or evidence of a positive test and recovery. To use this flow, install the Employee Health Verification managed package.

To modify a flow for your own use, head to the Flows page in Setup and click **New Flow**. Click **All + Templates**, select a sample flow, and edit it as needed. Then, save and activate the flow.

Connect HR Service Center to Workday—Connect HR Service Center to Workday so you can create flows that reflect information from an employee’s Workday account.

Use the Improved Onboarding Tasks Component—We replaced the Employee Onboarding Tasks component with an equivalent component that auto-refreshes to reflect the employee’s assigned tasks. If you were using the component in version 1.0, remove the *Employee Onboarding Tasks (deprecated)* component from your employee record page and replace it with the *Employee Onboarding Tasks* component.

Hide the Welcome Task Component—After an employee completes the onboarding tasks listed in their Welcome Task component, they don’t have much use for the component. The component is now hidden 30 days after an employee completes their final onboarding task. This delay gives employees time to revisit completed tasks. To change the number of days, go to the Custom Settings page in Setup and click **Manage** next to HRSC\_Settings. Click **New** above “Default Organization Level Value,” set a value for the “Welcome Task Visibility Offset” setting, and save your changes.

Publish Knowledge Articles for Employees—Save time by personalizing our sample knowledge articles to communicate your company’s policies to employees. The articles are published to your knowledge base automatically when you update to version 2.0. If an article isn’t relevant to you, archive it; otherwise, edit and republish the article. Here are the titles of the articles you receive.

 **Note:** The sample knowledge articles are available only to customers who are installing HR Service Center for the first time.

- “(Sample article) Credit card not accepted for medical payments”
- “(Sample article) Discrimination-free workplace”

- “(Sample article) Request paid time off (PTO)”
- “(Sample article) Essentials for new employees”
- “(Sample article) Set up or update direct deposit in Workday”

SEE ALSO:

[Salesforce Help: Connect HR Service Center to Workday](#)

[Salesforce Help: Add Onboarding Tasks to the Employee Record Page](#)

[Salesforce Help: Add the Welcome Task Component to the Home Page](#)

[Salesforce Help: Use Flows to Automate HR Processes](#)

[Salesforce Help: Publish Knowledge Articles for Employees](#)

## July 15, 2021 (Version 1.0): Generally Available

New to the Work.com suite of solutions, HR Service Center complements a unified employee experience platform to support a hybrid workforce.

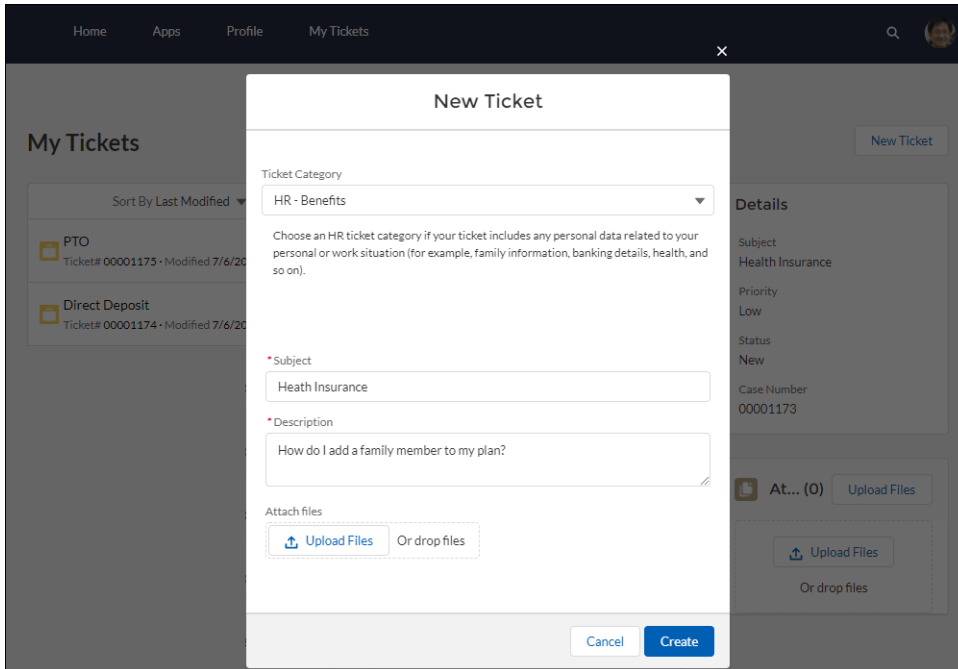
With the HR Service Center app you can:

- Save hundreds of hours of manual work by automating repetitive tasks.
- Allow employees to log HR tickets to create a case and simplify your support team’s workload and responsibilities.
- Configure functional onboarding sample templates with useful patterns such as reviewing documents or applying for a corporate credit card.

### Create HR Cases Using a Self-Service Help Desk

Employees can access HR agents through a self-service help desk and get vital job information. Included in the installation package are the following predefined HR queues for case assignments:

- HR - Benefits
- HR - Employee Relations
- HR - General
- HR - Leave
- HR - Onboarding
- HR - Payroll

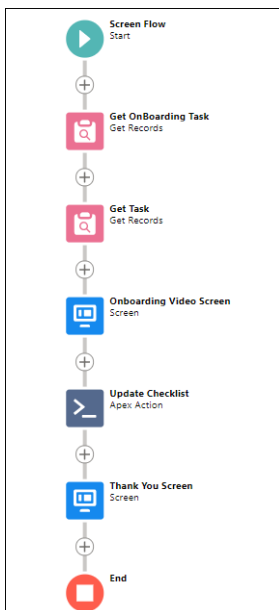


A support ticketing system allows your HR department to create cases and manage tickets with tailored workflows to streamline requests.

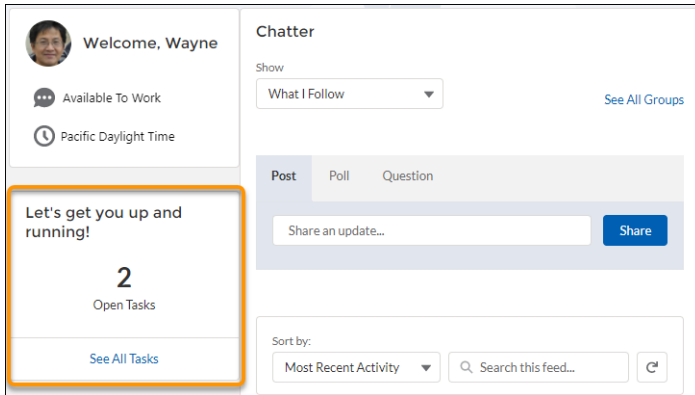
### Use Sample Flows for Onboarding New Employees

Also included in the installation package are four sample flows templates. Customize or create flows to fit your business needs. With all your onboarding tasks listed in one place, you can help new employees be productive from their first day, regardless of their location.

For example, you can assign a nondisclosure statement for a new employee to review by customizing the sample Review Documents automated flow.



The assigned task associated with the automated flow appears on the new employee’s Employee Workspace home page as an open task.



### New items for developers

HR Services provides custom objects for developers to create onboarding tasks and templates.

- Create the various onboarding tasks for new employees using the `wkdw__OnboardingTask__c` object.  
[Employee Concierge for Work.com Developer Guide: wkdw\\_\\_OnboardingTask\\_\\_c](#)
- Create templates for HR agents to assign tasks to new employees using the `wkdw__OnboardingTemplate__c` object.  
[Employee Concierge for Work.com Developer Guide: wkdw\\_\\_OnboardingTemplate\\_\\_c](#)
- Use the `wkdw__OnboardingTemplateTask__c` object to join the onboarding tasks to a template.  
[Employee Concierge for Work.com Developer Guide: wkdw\\_\\_OnboardingTemplateTask\\_\\_c](#)

See [HR Service Center](#) for more information and installation instructions.

## Employee Service Catalog

A service catalog is a portfolio of the products and services you provide to your employees. Employee Service Catalog helps you turn your employees' requests for those products and services into approved and documented orders.

**Where:** This change applies to all editions. Employee Service Catalog is easily accessible as a managed package for orgs with Employee Concierge.

**Who:** The Employee Productivity Plus add-on license or the IT Service Center and Endpoints add-on license is required in your org to grant access when configuring Employee Service Catalog. Assign new users the Service Catalog Builder or Service Catalog User permission set to get started. Administrators with Service Catalog Builder access can create, edit, and delete all catalog configuration, and can view and modify all generated requests. Users with Service Catalog User access can request items.

### [January 13, 2023 \(Spring '23\): Clone and Delete Custom Service Catalog Fulfillment Flows with Fulfillment Flow Builder](#)

You can now clone and delete Service Catalog fulfillment flows with Fulfillment Flow Builder. If you have a valuable fulfillment flow, you can clone it to make changes without interrupting users' ability to use that flow. You can delete fulfillment flows you no longer need. Deleted fulfillment flows are irretrievable.

### [January 13, 2023 \(Spring '23\): Create Case Queues Automatically with Fulfillment Flow Builder](#)

Now Fulfillment Flow Builder can look up to Queue for a specific object (such as Case). Previously, Fulfillment Flow Builder could not look up to Queue. Queue is used to prioritize, distribute, and assign the records used by teams when sharing workloads. In Service Catalog, Queue is used during the record creation process, specifically for cases.

### [January 13, 2023 \(Spring '23\): API Updates for Catalog Items](#)

In API version 57.0 and later, giving inputs through the `SvcCatalogItemDef` object saves those inputs in two new entities: `SvcCatalogItemAttribute` and `SvcCatalogItemAttrDetails`. These entities were added to facilitate future feature changes to catalog items in Service Catalog.

### [August 23, 2022: Customize Flows with Fulfillment Flow Builder](#)

Fulfillment Flow Builder lets your users create their own fulfillment flows. Using your screen flows as a base, your users can customize values for inputs to make needed adjustments to their catalog items, making those items easier to use. For example, you can customize a flow to add a priority value to cases to help case agents triage their responses.

### [August 23, 2022: Elevate Important Services with Featured Catalog Items](#)

Showcase specific services to your employees using featured catalog items. Catalog items marked as Featured are shown prominently in Service Catalog, helping your employees rapidly find the products and services they use the most. You can mark catalog items as Featured in managed, unmanaged, and unlocked packages.

### [August 23, 2022: View Catalog Request Attachments](#)

Now, to view related items on a catalog request, go to the request's Related tab. Previously, related items on a catalog request appeared as a link, appended to an additional question on the request.

### [August 23, 2022: Monitor Your Service Catalog Setup Changes](#)

With the new entities on the Setup Audit Trail, you can track the recent setup changes that you and other admins make to Service Catalog. Specifically, you can now track changes to the Service Catalog Item Definition and Service Catalog Category setup entities.

### [January 27, 2022 \(Package 8.7\): Sample Service Catalog Items Package](#)

To see examples of service catalog items, such as request a new laptop, reset a password and provide feedback to IT, install the Sample Service Catalog Items Package (optional). Use this unlocked package as a reference to create items for your own catalog.

### [January 20, 2022 \(Package 8.7\): Generally Available](#)

Deliver products and services to your employees using Employee Service Catalog, now generally available. Employee Service Catalog helps you turn your employees' requests for products and services into approved and documented orders.

## January 13, 2023 (Spring '23): Clone and Delete Custom Service Catalog Fulfillment Flows with Fulfillment Flow Builder

You can now clone and delete Service Catalog fulfillment flows with Fulfillment Flow Builder. If you have a valuable fulfillment flow, you can clone it to make changes without interrupting users' ability to use that flow. You can delete fulfillment flows you no longer need. Deleted fulfillment flows are irretrievable.

## January 13, 2023 (Spring '23): Create Case Queues Automatically with Fulfillment Flow Builder

Now Fulfillment Flow Builder can look up to Queue for a specific object (such as Case). Previously, Fulfillment Flow Builder could not look up to Queue. Queue is used to prioritize, distribute, and assign the records used by teams when sharing workloads. In Service Catalog, Queue is used during the record creation process, specifically for cases.

The Service Catalog Builder defines which specific queue links to a fulfillment flow. The new case owner is the selected queue.

SEE ALSO:

[Salesforce Help: Create Queues](#)



## January 13, 2023 (Spring '23): API Updates for Catalog Items

In API version 57.0 and later, giving inputs through the `SvcCatalogItemDef` object saves those inputs in two new entities: `SvcCatalogItemAttribute` and `SvcCatalogItemAttrDetails`. These entities were added to facilitate future feature changes to catalog items in Service Catalog.

These new entities are linked to the `SvcCatalogCategoryItem` object. The `SvcCatalogItemDef` and `SvcCatalogRequest` objects are also updated.

Additionally, in API version 57.0 and later, the `SvcCatalogFulfillFlowItem` object is removed.

SEE ALSO:

[Salesforce Tooling API Documentation: SvcCatalogCategoryItem object](#)

## August 23, 2022: Customize Flows with Fulfillment Flow Builder

Fulfillment Flow Builder lets your users create their own fulfillment flows. Using your screen flows as a base, your users can customize values for inputs to make needed adjustments to their catalog items, making those items easier to use. For example, you can customize a flow to add a priority value to cases to help case agents triage their responses.

SEE ALSO:

[Salesforce Help: Create a Custom Fulfillment Flow](#)

## August 23, 2022: Elevate Important Services with Featured Catalog Items

Showcase specific services to your employees using featured catalog items. Catalog items marked as Featured are shown prominently in Service Catalog, helping your employees rapidly find the products and services they use the most. You can mark catalog items as Featured in managed, unmanaged, and unlocked packages.

## August 23, 2022: View Catalog Request Attachments

Now, to view related items on a catalog request, go to the request's Related tab. Previously, related items on a catalog request appeared as a link, appended to an additional question on the request.

## August 23, 2022: Monitor Your Service Catalog Setup Changes

With the new entities on the Setup Audit Trail, you can track the recent setup changes that you and other admins make to Service Catalog. Specifically, you can now track changes to the Service Catalog Item Definition and Service Catalog Category setup entities.

**How:** To view the audit history, from Setup, in the Quick Find box, enter *View Setup Audit Trail*, and then select **View Setup Audit Trail**.

## January 27, 2022 (Package 8.7): Sample Service Catalog Items Package

To see examples of service catalog items, such as request a new laptop, reset a password and provide feedback to IT, install the Sample Service Catalog Items Package (optional). Use this unlocked package as a reference to create items for your own catalog.

 **Note:** The Sample Service Catalog Items Package is available only in English.

SEE ALSO:

[Salesforce Help: Sample Service Catalog Items Package](#)

## January 20, 2022 (Package 8.7): Generally Available

Deliver products and services to your employees using Employee Service Catalog, now generally available. Employee Service Catalog helps you turn your employees' requests for products and services into approved and documented orders.

SEE ALSO:

[Salesforce Help: Employee Service Catalog](#)

## Shift Management for Work.com

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Shift Management for Work.com streamlines the process of getting your employees back to work safely. Model the relationships and occupancy of your workplace sites, facilities, and resources. Then incorporate new requirements and policies to plan for how many people can be on-premises at a time. Let your team know when to show up to avoid crowding in common areas such as lobbies and elevators.

**Where:** Shift Management for Work.com is available in Lightning Experience in **Enterprise** and **Unlimited** editions.

**Who:** Shift Management is available as an add-on license with Work.com and Workplace Command Center.

### [December 10, 2020: Let Employees Book Shifts Anywhere \(Preview\)](#)

Version 5 introduces an alternative mobile app where employees can find and book shifts at locations other than their assigned workplace. After the upgrade, configure navigation in the mobile app so that your team doesn't lose access. Shift Management managed package version 5.1 was released to sandboxes on December 03, 2020 and released to all orgs on December 10, 2020.

### [October 19, 2020: Self-Service Shift Scheduling](#)

Shift Management managed package version 4.0 was released to sandboxes on October 12, 2020 and released to all orgs on October 19, 2020.

### [September 3, 2020: Streamlined Planning and a Fresh Mobile App](#)

Shift Management managed package version 3.0 was released to sandboxes on August 27 and version 3.2 was released to all orgs on September 3.

### [July 27, 2020: Flexible Location Modeling and Facility Planning](#)

Simplify setting up your location data and service territories. Find the Facility Plans you already created. Shift Management managed package version 1.73 was released on July 27. Managed package version 2.02 was released on August 6 with minor fixes.

### [June 25, 2020](#)

This release includes these new features and behaviors.

## December 10, 2020: Let Employees Book Shifts Anywhere (Preview)

Version 5 introduces an alternative mobile app where employees can find and book shifts at locations other than their assigned workplace. After the upgrade, configure navigation in the mobile app so that your team doesn't lose access. Shift Management managed package version 5.1 was released to sandboxes on December 03, 2020 and released to all orgs on December 10, 2020.

### Let employees book shifts at any location

Choose a new Shift Booking mobile app to let your team find and reserve shifts at any location that's part of your plan. For example, with multiple offices in one metro area, your employees can book shifts at the location that works best. And people traveling for critical business or who relocated can book time at a local office.

Create self-service facility plans as usual to define the open shifts. When employees log in to the app, they can search for open shifts at any location.

Review the setup information for multi-location shift booking, then follow the steps to set up or update your Work.com org.

[Salesforce Help: How Does Shift Scheduling Work?](#)

### Update your Shift Management org

Make sure your employees have the latest tools and permission sets for the Shift Management managed package. After the upgrade, you must configure app access for your employees.

**!** **Important:** In Work.com orgs created before version 5, the Back to Work tab is removed from the Back to Work app after the upgrade. Your employees don't have access to the mobile app until you configure the app's navigation. You can select the previously available Back to Work tab or the new Shift Booking tab for self-service scheduling at open locations.

[Salesforce Help: Update an Existing Shift Management Org](#)

## October 19, 2020: Self-Service Shift Scheduling

Shift Management managed package version 4.0 was released to sandboxes on October 12, 2020 and released to all orgs on October 19, 2020.

- Let employees book their own shifts

Give shift planners a break with self-service scheduling. Create open shifts from the facility plan, then let employees book what works for them.

Facility plans use either managed or self-service scheduling.

Add Facility Plan

Select a facility plan type. For both types, you create open shifts based on occupancy limits.

Managed scheduling  
You assign shifts to employees for them to accept or decline.

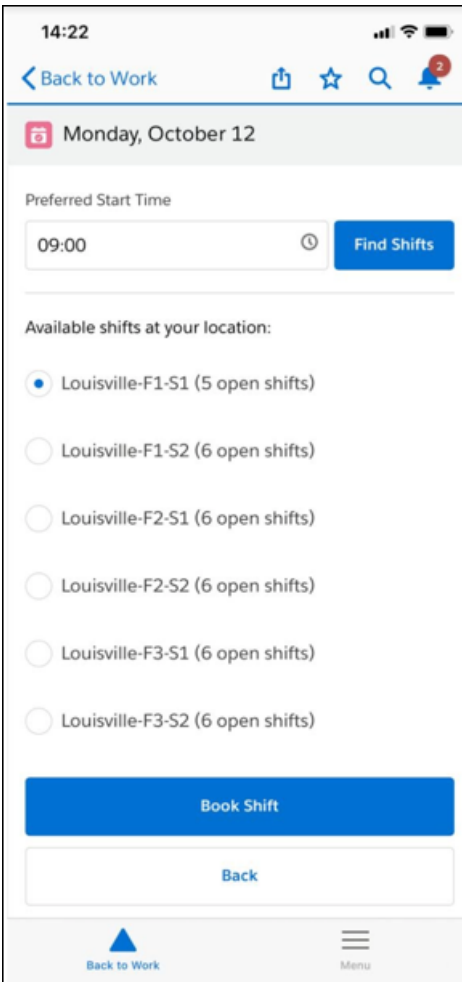
Self-service scheduling  
Employees schedule their own shifts.

Next

- Managed scheduling—Shift planners assign and send out shifts to employees. Planners are responsible for finalizing the schedule.
- Self-service scheduling—Facility managers create shifts and let people know that booking is open. Employees find and book their preferred shifts in the mobile app.

If the facility plan uses staggered arrivals, the staggering process runs as soon the shifts are generated. The staggering process adds the arrival window times to each shift so that employees know when they can arrive.


Employees can select shifts at any of the sublocations within their service territory. For example, an employee assigned to floor 10 of an office building can choose shifts on floor 10, or any other floor. They can change their shift reservations as needed, but can reserve only 1 shift per day.



#### [Salesforce Help: Create Facility Plans](#)

- Customize the mobile app banner image

Use a custom banner image in the employee mobile app home page. You can reference a static resource in your Salesforce org. Upload the image resource, then add the resource name in the Shift Management Setup tab. Images are resized to a height of 190 px, so we recommend an image size of at least 190x190 pixels.

1. From the App Launcher , select **Shift Management Setup**.
2. Under Define App Settings, click **Setup**.
3. Click the **Employee App Settings** tab.
4. In the App Banner Image field, enter the name of the static resource.

[Salesforce Help: Define Static Resources](#)

- Update an existing org  
To keep everything working smoothly, get the updated permission sets for the Shift Management managed package.

[Salesforce Help: Update an Existing Shift Management Org](#)

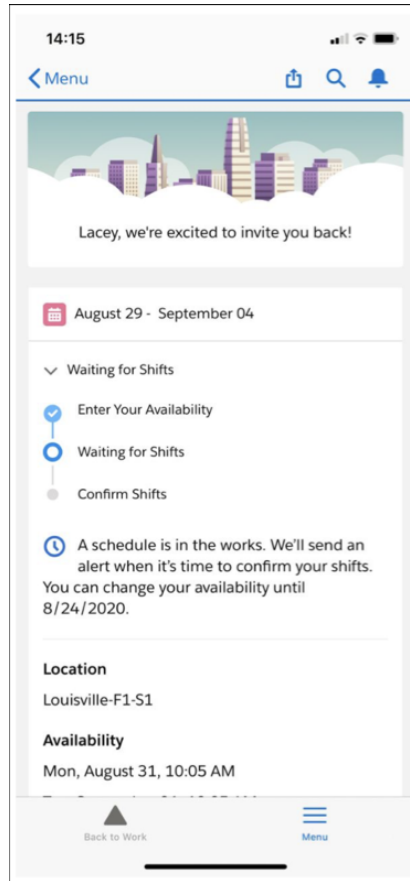
## September 3, 2020: Streamlined Planning and a Fresh Mobile App

Shift Management managed package version 3.0 was released to sandboxes on August 27 and version 3.2 was released to all orgs on September 3.

### Guide employees back to work with the refreshed mobile app

When your team is ready to come back to work, they notice a streamlined process and improvements throughout the mobile app. Everything has a fresh look, including the home page and the arrival pass. To spiff things up, we also made behind-the-scenes changes.

- Each week is a separate section in the app home page, corresponding to the weekly facility plan. Expanding the section reveals a progress bar to guide employees through the process.
- Your employees can change their availability until the response due date that you set in the facility plan.
- Employees can decline a previously accepted shift. When they do, the system creates a resource absence to let shift planners know that the employee is unavailable.
- Arrival passes appear in the app as soon as shifts are confirmed.



### Fine-tune app settings

Use the redesigned Shift Management setup to choose app settings. Control how employee availability works and improve the app experience with new mobile app settings. Set a default start time and the length of time to consider employees available for shifts. Choose when to remind employees before upcoming shifts, up to 24 hours before the shift starts.

[Salesforce Help: Complete the Recommended Setup](#)

### Manage facility plans and request availability from a single screen

Shift planning just got easier, with all the important parts in one place. Workplace managers can request employee availability right from the facility plan. With everything linked to the plan, it's a snap to limit occupancy, send notifications, and create open shifts week by week.

Set a due date for employees to enter the times they can come in. Then notify everyone included in the facility plan with the Send Requests button, which replaces the Availability Request tab.

[Salesforce Help: Create Facility Plans](#)

### New custom fields

These fields were added to the Shift Management managed package.

- The `Completion_Date__c` field on `wkfsl__Facility_Plan__c` sets the due date for employees to enter their shift availability.
- The `AvailabilityRequestsSentDate__c` field on `wkfsl__Facility_Plan__c` tracks when the workplace manager sends availability notifications to employees.
- The `Facility_Plan__c` field on `Shift` links to the facility plan that created the shift.

[Work.com Developer Guide: wkfsl\\_\\_Facility\\_Plan\\_\\_c](#)

[Work.com Developer Guide: Shift](#)

### Update an existing org

To get the latest features in the Shift Management managed package, make a few tweaks to your org's configurations. Get the latest flows and permission sets. Turn on employee shift notifications and simplify page layouts.

[Salesforce Help: Update an Existing Shift Management Org](#)

### Deprecated components

You can't make a cake without breaking eggs. To make the app run smoothly, we simplified things and created components. So now there are a few extra ingredients.

Review the list of Lightning components, objects, and flows that are no longer used in the Shift Management managed package. Then review your custom code or existing customizations for references to these entities and make updates accordingly.

- Flows:
  - employeePlannerNotificationTriggerProcess
  - employeeSendPushNotificationAssignedShifts
  - employeeSendPushNotificationBeforeActualShift
  - employeeSendPushNotificationOnArrivalChange
  - employeeSendPushNotificationSuggestedServiceAppointments
- Lightning app pages:
  - employeeMainPage
  - employeePlanningPeriod
  - employeeAccept\_Reject\_Shifts
- Lightning app components:
  - Availability Requests
  - Employee Accept Shifts
  - Employee Banner
- The wkfsl\_Planning\_Period\_\_c object and its fields are replaced by fields in wkfsl\_\_Facility\_Plan\_\_c. Workplace managers now send notifications to employees via a button in the facility plan.
- In the Shift object, the wkfsl\_\_PlanningPeriod\_\_c field is replaced by a lookup field to the facility plan.

## July 27, 2020: Flexible Location Modeling and Facility Planning

Simplify setting up your location data and service territories. Find the Facility Plans you already created. Shift Management managed package version 1.73 was released on July 27. Managed package version 2.02 was released on August 6 with minor fixes.

### Model locations that match your business

Not all workplaces are alike. Model your location hierarchy in a way that makes sense, such as regions or states down through cities, buildings, and spaces. Then, choose which location types represent your facilities, like warehouses and sites, during setup. Your workplace managers can create facility plans for the types that you choose. Previously, you could create facility plans for only top-level locations (service territories).

[Salesforce Help: Shift Management Considerations](#)



### Use custom work types in facility plans

Create work types that suit your needs and pick which one to use for each facility plan. For example, you can create a work type that sets the shift duration to four hours. If you don't choose a work type during facility planning, available shifts use the default type that the admin chooses during setup.

[Salesforce Help: Create Facility Plans](#)

### New custom fields

These fields were added to the Shift Management managed package.

- The `wkfs1__Select_for_Facility_Plan__c` field on `ServiceTerritory` marks the territory for facility planning.
- The `wkfs1__Work_Type__c` field on `wkfs1__Facility_Plan__c` links to the facility plan's work type.
- The `wkfs1__Related_Top_Level_Territory__c` field on `wkfs1__Facility_Plan__c` links to the top-level service territory associated with the facility plan's service territory.

[Work.com Developer Guide: wkfs1\\_\\_Facility\\_Plan\\_\\_c](#)

[Work.com Developer Guide: ServiceTerritory](#)

### Update custom permission sets

Before you use shift management, update the custom permission sets.

- From the App Launcher, select **Shift Management Setup**.
- Under Add Permission Sets, click **Update**.

## June 25, 2020

This release includes these new features and behaviors.

- If the results of a wellness survey change the status of an employee with confirmed shifts, an absence is created. Shift planners can see absences in the Shift Schedules tab.
- The new Workplace Shifts Command Center App Settings custom permission set, combined with the Shift Management Command Center Permissions permission set, allows users to view data in the Shifts At-a-Glance component in Command Center. Assign the permission sets to your Command Center users.

After the upgrade, activate two Lightning apps to provide access to shifts and notifications in the Salesforce mobile app.

1. From Setup, enter `lightning app` in the Quick Find box and select **Lightning App Builder**.
2. Set the Accept/Reject Shifts app as the org default for mobile devices.
  - a. In the list of apps, click **View** for the Accept/Reject Shifts app.
  - b. Click **Activation**.
  - c. Click **Assign as Org Default**.
  - d. Select Phone and click **Next**.
  - e. Save your changes.
3. Repeat steps 2a-e for the View Employee Badge app.

After each upgrade, update permission sets and Flows:

1. Update the custom permission sets.
  - a. From the app launcher, select **Shift Management Setup**.
  - b. Under Add Permission Sets, click **Update**.

2. Check for new Flow versions and activate them.
  - a. Go to **Setup | Flows**.
  - b. Find and activate the most recent version of the following flows:
    - employeePlannerNotificationTriggerProcess
    - employeeSendPushNotificationAssignedShifts
    - employeeSendPushNotificationBeforeActualShift
    - employeeSendPushNotificationOnArrivalChange
    - employeeSendPushNotificationSuggestedServiceAppointments

## Workplace Strategy Planner

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Evaluate the risks and priorities of operating each of your workplace locations. With Workplace Strategy Planner, add COVID-19 public health data, government guidelines, and business priorities to give more context to the current conditions at your workplace locations. Use the interactive dashboard to analyze the data in aggregate and to help you decide when to open or close a location.

**Where:** Workplace Strategy Planner is available as a managed package for Work.com orgs with Workplace Command Center. It's available for Lightning Experience in Enterprise and Unlimited editions.

**Who:** Workplace Strategy Planner is available to Workplace Command Center admins and users with an Analytics Growth or Analytics Plus license.

[March 10, 2021 \(Package 1.5\): Aggregate Sublocation Data with New Dashboard Filters](#)

Aggregate sublocation data for each location with new Strategy Planner dashboard filters.

[January 28, 2021 \(Version 1, Package 1.3\): Generally Available](#)

The initial release of Workplace Strategy Planner is now generally available.

### March 10, 2021 (Package 1.5): Aggregate Sublocation Data with New Dashboard Filters

Aggregate sublocation data for each location with new Strategy Planner dashboard filters.

Three new dashboard filters ensure that floor-level sublocation data at a building location aggregate and appear as a single data point in Strategy Planner. US and Non-US Location dashboard components require a new Record Field filter. The Non-US Location component also requires an update to the Filter String. Install and configure Strategy Planner following the instructions to ensure that the app includes these filters. If an earlier version of Strategy Planner is installed, upgrade your COVID-19 Risk app template and add these new filters. If you don't upgrade the template and add the new filters, Strategy Planner dashboards display sublocation data.

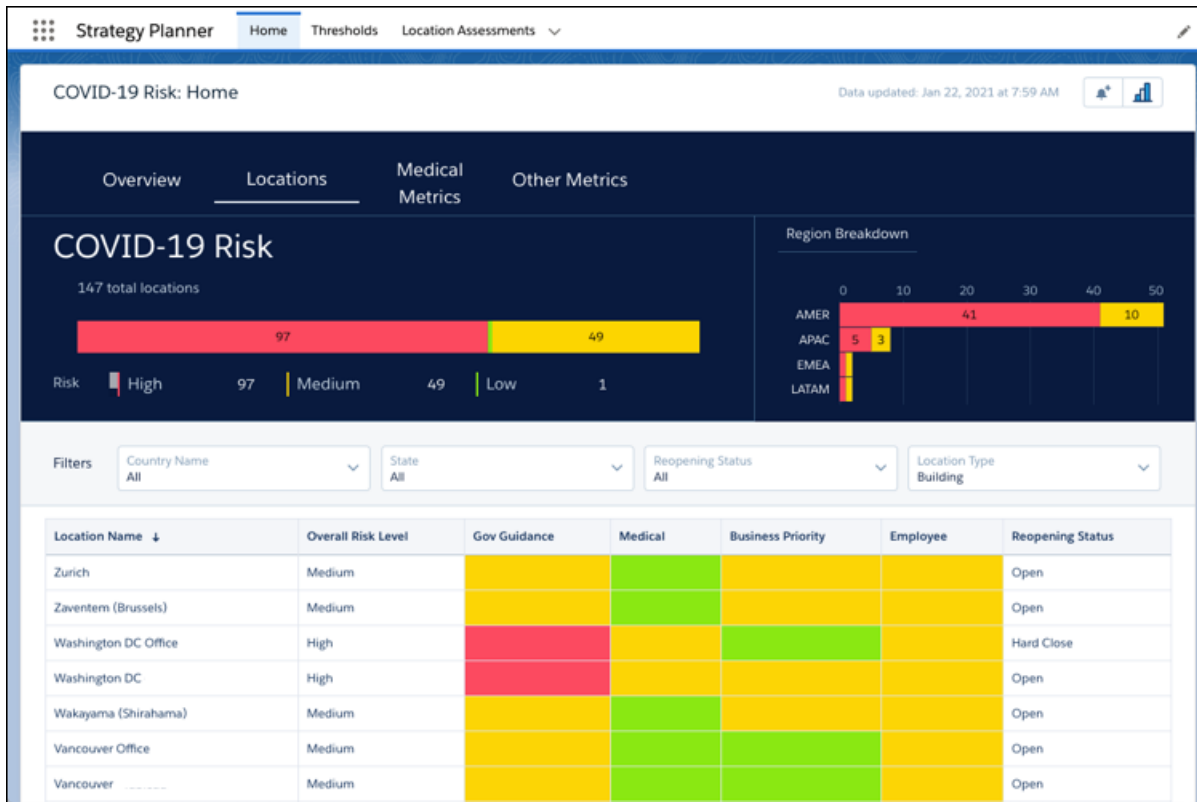
See [Salesforce Help: Add the COVID-19 Risk Component to Location Records](#) for more information and instructions on adding the Strategy Planner filters.

### January 28, 2021 (Version 1, Package 1.3): Generally Available

The initial release of Workplace Strategy Planner is now generally available.

Workplace Strategy Planner brings data on medical trends, government guidance, business priorities, and employee sentiment into one evaluation tool. Set opening and closing thresholds for individual metrics. When a threshold is reached, a dashboard updates with the

current risk level for that location. Use the dashboard to see the aggregate data and to help make an informed decision whether to open or close a location.



See [Workplace Strategy Planner](#) in Salesforce Help for more information and installation instructions.

## Emergency Response Management

Use Emergency Response Management products and solutions to serve residents, communities, and agencies when they need it most. Provide access to emergency information, deliver care to those affected, and allocate resources and services with more speed and efficacy than ever before.

**Where:** Emergency Response Management is available in Lightning Experience in Enterprise, Performance, and Unlimited editions where Emergency Management for Public Sector or Emergency Response Management for Public Health is enabled.

**Who:** Salesforce Emergency Response Management for Public Health and Salesforce Emergency Response Management for Public Sector customers.

To use Emergency Response Management for Public Health, you must have the Emergency Response for Public Sector and the Health Cloud Platform permission set license provisioned in Salesforce. Community users must have the Health Cloud for Community and the Public Sector Community permission set licenses provisioned in Salesforce.

[July 30, 2020: Emergency Response Management for Public Health, Emergency Response Management for Public Sector, Volunteer Management, and Grants Management](#)

With version 2 of both Emergency Response Management for Public Health and Emergency Response Management for Public Sector, we've given you more tools to manage and mitigate emergencies.

## July 30, 2020: Emergency Response Management for Public Health, Emergency Response Management for Public Sector, Volunteer Management, and Grants Management

With version 2 of both Emergency Response Management for Public Health and Emergency Response Management for Public Sector, we've given you more tools to manage and mitigate emergencies.

### **Emergency Response Management for Public Sector**

Quickly deploy a single digital destination for constituents and communities to access available emergency program information and incident updates. Use the Emergency Response community to feature different services and programs that are available for public agencies and hospitals, such as emergency supply requests. People can request permits for building access, or apply for assistance programs like food delivery services. Using the mobile Inspection App field responders can deliver emergency services quickly and efficiently. Businesses can use the community to request permits to reopen to the public. When the permit is approved, your inspector can use the Inspection App to verify that the site is compliant with local health and safety ordinances.

[Salesforce Help: Emergency Program Management for Public Sector](#)

### **Emergency Response Management for Public Health**

Mobilize your public health department to serve its constituents and communities when there's a health emergency. Quickly triage and evaluate patients, provide ongoing engagement and monitoring, and protect communities from further infection with contact tracing. Tracing and contacting people who were possibly exposed to an infected person is one of the most efficient ways to fight widespread community infection. With Contact Outreach, tracers obtain crucial information about a person's condition and medical history. Tracers assess the person's living situation, and provide help by sending a daily monitoring survey or enrolling the person in a care program. Public agencies or hospitals can use the Emergency Response community to request emergency supplies or other services. Individuals can request to participate in assistance programs such as food delivery services or short-term housing. Using Salesforce Maps, dispatch your field responders with speed and efficiency to the locations or citizens who need assistance. Analytics dashboards give you powerful insights into community health so that you can make faster and smarter decisions.

[Salesforce Help: Emergency Program Management for Public Health](#)

### **Volunteer Management**

Volunteer Management helps you manage volunteer projects at scale and amplify reach by sharing volunteering opportunities to external community sites. Volunteers can sign up for volunteer projects on your community and update the time they have spent on volunteer activities.

[Salesforce Help: Configure Volunteer Management](#)

### **Grants Management**

Grants Management helps you launch a Grantee Portal for grant seekers. From the portal, grant seekers can find and apply for funding opportunities, view their application status, and submit ongoing progress reports for awarded grants all

[Power of Us Hub: Grants Management](#)

## Customer-Facing Apps

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Our customer-facing Work.com apps help you reestablish customer trust and jumpstart business growth. Our Queue Management app helps you regulate customer flow with a digital wait-list for patrons and occupancy oversight tools. Broadcast Messaging keeps customers informed with notifications and automatic responses. Digital Trust Cards give your customers peace of mind by identifying the safety protocols you're taking to safely reopen and operate your business.

### [Digital Trust Cards](#)

Show your customers how you keep them safe as your business reopens during COVID. Digital Trust Cards are a great way to give customers peace of mind in these uncertain times. Create a trust card for each of your business locations, and publish them on your website. Each trust card displays trust measures or COVID safety protocols that your business follows.

### [Queue Management](#)

Managing customer flow is easier than ever. With Queue Management, let customers join a digital wait-list and text them when it's their turn to enter.

### [Broadcast Messaging](#)

Send SMS messages to up to 2,000 recipients at once. Users with the "broadcaster" permissions can send messages from your contact, person account, employee, or messaging user list views. Create processes that send messages to recipients automatically.

## Digital Trust Cards

Show your customers how you keep them safe as your business reopens during COVID. Digital Trust Cards are a great way to give customers peace of mind in these uncertain times. Create a trust card for each of your business locations, and publish them on your website. Each trust card displays trust measures or COVID safety protocols that your business follows.

**Where:** Trust cards are available in Lightning Experience in Enterprise, Unlimited, and Performance editions

**Who:** Hotels, retail stores, and entertainment venues are just some of the customer-facing businesses that can benefit from posting a trust card to their website. Your admin adds the trust card code snippet to your website, assigns the Trust Card Manager permission set to location managers, and creates locations for each customer-facing business. To publish trust measures and create a single location's trust card, you must have the Trust Card Manager permission set. Trust measures reflect local and national governmental guidance for safe reopening during COVID.

### [January 15, 2020](#)

A bug fix allows you to customize your trust cards' query by modifying the Apex Controller.

### [October 15, 2020](#)

Digital Trust Cards illustrate your commitment to keeping customers safe as your business reopens in COVID. Add the feature to your website, create a unique trust card for each of your business locations, and enable business managers to keep their trust cards updated as COVID guidance evolves.

## January 15, 2020

A bug fix allows you to customize your trust cards' query by modifying the Apex Controller.

### **Customize Your Trust Cards' Query in Sandbox and Push to Production**

To pull in custom field data to the location or location trust measure objects, or to add more standard fields to the location object, you can modify your trust cards' query. Customize the Apex Controller in your Salesforce developer org, test it in your sandbox, and push the changes to your production org.

[Salesforce Help: Customize Your Digital Trust Cards' Query](#)

## October 15, 2020

Digital Trust Cards illustrate your commitment to keeping customers safe as your business reopens in COVID. Add the feature to your website, create a unique trust card for each of your business locations, and enable business managers to keep their trust cards updated as COVID guidance evolves.

**Display Trust Cards on Your Website**

Your admin generates a code snippet and embeds it on your company website. The code snippet allows trust cards to display on your site.

[Salesforce Help: Install and Configure the Digital Trust Cards Feature](#)

**Create a Unique Trust Card for Each of Your Customer-Facing Business Locations**

Use the Location object to specify that a trust card represents a hotel, retail store front, or other physical location occupied by your business. To show customers how you work within local and national COVID guidance to keep them safe, write and publish unique trust measures for each location.

[Salesforce Help: Create and Publish a Digital Trust Card on Your Website](#)

**Enable Location Managers to Write Their Own Trust Cards**

Assign the Trust Card Manager permission set to the manager of a hotel, retail store, or other customer-facing location occupied by your business. If the location manager doesn't need other Salesforce access, create a Trust Card Manager profile by cloning the Identity User profile.

[Salesforce Help: Enable Your Team to Manage Trust Cards](#)

**Customize Your Trust Cards' Query in Sandbox and Push to Production**

To pull in custom field data to the location or location trust measure objects, or to add more standard fields to the location object, you can modify your trust cards' query. Customize the Apex Controller in your Salesforce developer org, test it in your sandbox, and push the changes to your production org.

[Salesforce Help: Customize Your Digital Trust Cards' Query](#)

## Queue Management

Managing customer flow is easier than ever. With Queue Management, let customers join a digital wait-list and text them when it's their turn to enter.

**Where:** Queue Management is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Lightning Scheduler SKU.

[October 15, 2020](#)

Queue Management helps you regulate customer flow with a digital queue for patrons and easily accessible occupancy information.

[November 11, 2020](#)

Queue Management helps you regulate customer flow with a digital queue for patrons and easily accessible occupancy information.

[December 10, 2020](#)

Create a visitor sign-up experience that allows patrons to easily register for your queues.

### October 15, 2020

Queue Management helps you regulate customer flow with a digital queue for patrons and easily accessible occupancy information.

**Let Patrons Join a Virtual Queue**

Allow guests to sign up in advance to enter your business or a location in your facility.

[Salesforce Help: Regulate Customer Flow with Queue Management](#)

**Reach Out to Guests Automatically**

To notify guests when they reach the front of the line, send them a text with Broadcast Messaging.

## November 11, 2020

Queue Management helps you regulate customer flow with a digital queue for patrons and easily accessible occupancy information.

### **Give Customers Peace of Mind With Current Wait Time**

Let customers know how long the queue is so they can be ready when it's their turn.

## December 10, 2020

Create a visitor sign-up experience that allows patrons to easily register for your queues.

### **Give Patrons a Link to Easily Sign Up for Your Queues**

Create a sign-up form for your queues that's customized for your business. Download the *Queue Management Visitor Experience* managed package from AppExchange and start building your form.

## Broadcast Messaging

Send SMS messages to up to 2,000 recipients at once. Users with the "broadcaster" permissions can send messages from your contact, person account, employee, or messaging user list views. Create processes that send messages to recipients automatically.

**Where:** Broadcast Messaging is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Digital Engagement add-on SKU.

[October 15, 2020](#)

Broadcast Messaging lets you send one-to-many text messages. Use it with Queue Management, Wellness Check, and Contact Tracing to send updates and share survey links via SMS.

## October 15, 2020

Broadcast Messaging lets you send one-to-many text messages. Use it with Queue Management, Wellness Check, and Contact Tracing to send updates and share survey links via SMS.

### **Send One-to-Many Messages**

Send SMS messages to up to 2,000 recipients at once. You can send messages automatically with Process Builder or manually from your contact, person account, employee, or messaging user list views.

[Salesforce Help: Set Up Broadcast Messaging in Service Cloud](#)

### **Send Queue Updates to Customers with Queue Management**

To let them know when it's their turn, send messages to customers in a queue. Broadcast Messaging is required for Queue Management.

[Salesforce Help: Control Customer Flow with Queue Management](#)

### **Send Daily Health Attestations for Wellness Check and Contact Tracing**

With Work.com and Broadcast Messaging, you can send employees and patients a link to health surveys and assessments.

Send messages from your list views or with a process. We recommend giving your Command Center users the broadcaster permissions. With permission, users can open the employee list views from the Wellness Status components to message employees. Users can also open person account list views from the Contact Tracing Status component to message patients.

[Salesforce Help: Broadcast Messaging in Work.com](#)

## Changes to Work.com Standard Objects, Records, and Metadata Types

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Here you can find new features or changes to Work.com standard objects.

### [June 12, 2021: Set Employee Field Visibility, Provision Users in Bulk, and Retain Field History for Work.com Standard Objects](#)

You can now create employee field visibility rules based on user persona and a user's relationship to an employee record. User provisioning allows you to create and link user records to employee records asynchronously. Define field history retention policies for Work.com standard objects.

### [March 15, 2021: Create Reports on the Employee Object and API Updates for Employee Profile](#)

You can now create reports on the Employee object. Create Employee reports to gain insights on employee status, wellness status, location, and more. Introduced in API 51.0, new fields, classes, and resources for the Employee Profile were documented in their respective developer guides.

### [December 02, 2020: New Metadata Type for the Automatic Employee User Sync Feature](#)

We introduced an Employee-User Sync feature that automatically creates a user record when a new employee record is added to an org. This type is the metadata type for its settings.

### [September 18, 2020: Enable Full Name Search for Employees, New Temporary Worker Type](#)

These changes appear in orgs using the Winter '21 (API version 50.0) release. By changing the value of the `Employee.Name` field, we've added the ability to search for employees by first, middle, or last name. And, the Worker Type field has a new standard picklist value for temporary workers.

### [August 13, 2020: Encryption for Employee Object](#)

This release includes the following new behavior.

### [August 5, 2020: New User Field for Employees](#)

A User field is now available for the Employee standard object so Work.com admins and developers can use it.

### [July 27, 2020: Simplified Permission Sets, Lightning Flows for Tasks, Navigation Improvements, and Logging Capabilities](#)

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### [June 18, 2020](#)

This release includes these new features and behaviors.

## June 12, 2021: Set Employee Field Visibility, Provision Users in Bulk, and Retain Field History for Work.com Standard Objects

You can now create employee field visibility rules based on user persona and a user's relationship to an employee record. User provisioning allows you to create and link user records to employee records asynchronously. Define field history retention policies for Work.com standard objects.

### **Set Employee Field Visibility for Enhanced Security and Privacy**

Employee field visibility ensures that users see only the fields they are allowed to see, according to their organization's data privacy policy. For example, set rules that allow a user to see their coworker's email, job location, and manager, but only themselves and their manager can see their wellness status and availability. You can use Salesforce-created field visibility rules, or customize your own set of rules.

### **Bulk Provisioning to Link Employee and User Records**

To create or link user records to employee records in bulk, you can now use the user provisioning process. This feature is for orgs that already have hundreds or thousands of employee records in Salesforce. The user provisioning process asynchronously scans



your employee records and creates or links user records as needed. The asynchronous nature of this process frees you up to do other tasks while waiting for the process to finish.

### Field History Retention Available for Work.com Standard Objects

You can now define policies to retain archived field history data for these objects:

 **Note:** Field history retention requires the purchase of the Field Audit Trail add-on license.

- Crisis
- Employee
- Employee Crisis Assessment
- Internal Organization Unit

#### SEE ALSO:

[Salesforce Help: Employee Field Visibility Rules](#)

[Salesforce Help: Provision Users for Large Amounts of Employee Data](#)

[Salesforce Help: Field Audit Trail](#)

[Work.com Developer Guide: Standard Objects Used by Work.com](#)

## March 15, 2021: Create Reports on the Employee Object and API Updates for Employee Profile

You can now create reports on the Employee object. Create Employee reports to gain insights on employee status, wellness status, location, and more. Introduced in API 51.0, new fields, classes, and resources for the Employee Profile were documented in their respective developer guides.

### New fields on the Employee standard object

To get info on Employee photo URLs, use the new `BannerPhotoUrl`, `FullPhotoUrl`, `MediumPhotoUrl`, and `SmallPhotoUrl` fields on the Employee object.

### New Connect REST API resources for Employee Profiles

Get an employee's banner photo

- Make a GET request to the new `/connect/employee-profiles/employeeId/banner-photo` resource.

Create and crop an employee's banner photo

- Make a POST request to the new `/connect/employee-profiles/employeeId/banner-photo` resource with the Banner Photo Input.

Delete an employee's banner photo

- Make a DELETE request to the new `/connect/employee-profiles/employeeId/banner-photo` resource.

Get an employee's photo

- Make a GET request to the new `/connect/employee-profiles/employeeId/photo` resource.

Create and crop an employee's photo

- Make a POST request to the new `/connect/employee-profiles/employeeId/photo` resource with the Photo Input.

Delete an employee's photo

- Make a DELETE request to the new `/connect/employee-profiles/employeeId/photo` resource.

### New methods for the `ConnectApi.EmployeeProfiles Apex class`

Get an employee's banner photo or photo

- `getBannerPhoto(employeeId)`
- `getPhoto(employeeId)`

Set and crop an employee's banner photo or photo

- `setBannerPhoto(employeeId, fileId, versionNumber)`
- `setBannerPhoto(employeeId, fileUpload)`
- `setBannerPhotoWithAttributes(employeeId, bannerPhoto)`
- `setBannerPhotoWithAttributes(employeeId, bannerPhoto, fileUpload)`
- `setPhoto(employeeId, fileId, versionNumber)`
- `setPhoto(employeeId, fileUpload)`
- `setPhotoWithAttributes(employeeId, photo)`
- `setPhotoWithAttributes(employeeId, photo, fileUpload)`

Delete an employee's banner photo or photo

- `deleteBannerPhoto(employeeId)`
- `deletePhoto(employeeId)`

## December 02, 2020: New Metadata Type for the Automatic Employee User Sync Feature

We introduced an Employee-User Sync feature that automatically creates a user record when a new employee record is added to an org. This type is the metadata type for its settings.

### Access Employee-User Sync settings

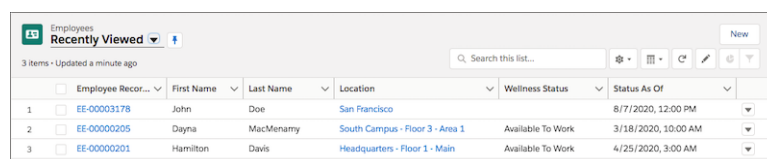
Use the new `EmployeeUserSettings` metadata type. Introduced in API version 50.0.

## September 18, 2020: Enable Full Name Search for Employees, New Temporary Worker Type

These changes appear in orgs using the Winter '21 (API version 50.0) release. By changing the value of the `Employee.Name` field, we've added the ability to search for employees by first, middle, or last name. And, the Worker Type field has a new standard picklist value for temporary workers.

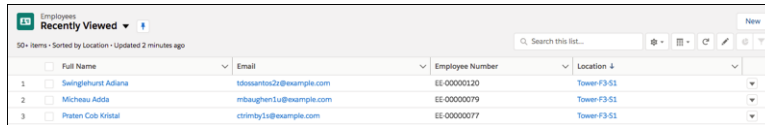
### Enable Searching for Employees on First or Last name with the new Full Name field

We added an Employee Full Name field to the UI as a compound field of the First Name, Middle Name, and Last Name so you can search on any part of a name and get results. This addition also changes the installed Employees list view. Before the update, the installed Employees list view looks like the following:




	Employee Recor...	First Name	Last Name	Location	Wellness Status	Status As Of
1	EE-00003178	John	Doe	San Francisco		8/7/2020, 12:00 PM
2	EE-00000205	Dayna	MacMenamy	South Campus - Floor 3 - Area 1	Available To Work	3/18/2020, 10:00 AM
3	EE-00000201	Hamilton	Davis	Headquarters - Floor 1 - Main	Available To Work	4/25/2020, 3:00 AM

After this update, the Employees list view now displays the Full Name field:



	Full Name	Email	Employee Number	Location
1	Swinglehurst Adriana	ldossantos2@example.com	EE-00000120	Tower-F3-51
2	Micheau Adda	mbaughen1u@example.com	EE-00000079	Tower-F3-51
3	Prater Cole Kristal	ckristal1s@example.com	EE-00000077	Tower-F3-51

 **Note:** If your org was in use before this change, you can run an Apex script to update your existing Employee records to use the Full Name field. For more information, see [Salesforce Help: Convert Legacy Employee Data to Use Full Name](#).

### Employee object Name field changed

The `Employee.Name` field now holds an auto-generated compound value of an employee's first+middle+last names and is displayed as Full Name in the Employees list view. Before this update, this field held an Employee record number and was labeled Employee Record ID in the UI.

[Workplace Command Center for Work.com Developer Guide: Employee](#)

### Assign a temporary worker status to an employee

Use the new Temporary picklist value on the Worker Type field (`Temporary` for the `WorkerType` field in the API) on the Employee object.

### New field

#### Related Person on the Employee object

We added a Related Person field (`RelatedPersonId` in API version 50.0) to the Employee object to link employees to person accounts. This field does not appear on your default record page layouts and is reserved for future use. Do not edit it.

[Workplace Command Center for Work.com Developer Guide: Employee](#)

## August 13, 2020: Encryption for Employee Object

This release includes the following new behavior.

### Increase the security of sensitive employee data with Shield Platform Encryption

If you track employee information in Work.com apps such as Wellness Check, Shift Management, or the Command Center, you can use Shield Platform Encryption to encrypt personal data contained in records based on the Employee object. Shield Platform Encryption is available on select fields on the Employee object.

Ensure that Shield Platform Encryption is enabled in your Work.com org, and then contact Salesforce Customer Support to enable encryption on the Employee object.

To review which employee fields can be encrypted, see [Salesforce Help: Which Standard Fields Can I Encrypt?](#)

[Salesforce Help: General Shield Platform Encryption Considerations](#)

## August 5, 2020: New User Field for Employees

A User field is now available for the Employee standard object so Work.com admins and developers can use it.

### Associate Employee records with Users

Use the User field (`UserId` in the API) on an Employee record to link employees to users in your org. For orgs in use before this update, add the User field to the Employee page layout.

[Salesforce Help: Create, Import, or Link User Records](#)

[Workplace Command Center for Work.com Developer Guide: Employee API](#)

[Workplace Command Center for Work.com Developer Guide: Link Employee with Other Objects](#)

### Use the Individual, Internal Organization Unit, Location, and Manager fields in the Validation Rule Editor

We fixed a bug so the Individual, Internal Organization Unit, Location, and Manager fields on the Employee object are listed when you click **Insert Field** in the create Validation Rule formula editor.

[Salesforce Help: Validation Rules](#)

## July 27, 2020: Simplified Permission Sets, Lightning Flows for Tasks, Navigation Improvements, and Logging Capabilities

Version 2 of Workplace Command Center includes fewer post-installation steps, support for Lightning Flows to automate tasks for the Operations Feed, and a log for troubleshooting issues.

### New recommendations for configuring Workplace Command Center permission sets and permission set groups

The Workplace Command Center now allows for fewer post-installation permission sets and permission set groups to shorten setup and configuration for new orgs. We've removed the Workplace Global Operations and Workplace Global Operations Executive permission sets from the package. Existing orgs using these permission sets need to reassign users following our new recommendations or an alternative configuration.

All admins of existing orgs receiving version 3 of Workplace Command Center: Review the [Upgrade to Workplace Command Center Package Version 3](#) instructions for more information.

### Add Lightning Flows to tasks in the Operations Feed

Extend the functionality of Operations Feed in the Workplace Command Center by adding Lightning Flows to tasks. If flows are configured using the new custom fields on the Task object, users with the correct permissions can launch a flow from a task.

[Salesforce Help: Create Automated Tasks for the Operations Feed](#)

### COVID-19 Tracker displays additional data

Workplace Command Center COVID-19 tracker component displays case data and related health policy information based on the map selection.

[Salesforce Help: Configure the Global COVID-19 Tracker Component](#)

### Navigation improvements within Workplace Command Center app

Better navigation in the Workplace Command Center standard components, including support for the console navigation. You can now use keystrokes to select items in the Status and Location lists in the Location Workplace Status component for more accessible navigation.

### View errors and exceptions from Workplace Command Center and Wellness Check

Work.com captures errors and exceptions that originate from Workplace Command Center and Wellness Check and adds them as log messages to the wkcc\_\_CmdCtrlLog\_\_c custom object. Use Setup to configure logging. Then create list views on the Command Center Log object to view and filter log messages.

[Salesforce Help: View Log Messages from Workplace Command Center and Wellness Check](#)

[Workplace Command Center for Work.com Developer Guide: Understand Logging](#)

### New Custom Fields on Standard Objects

#### Task

Use these new custom fields on the Task object to create and associate Lightning Flows with tasks in the Operations feed.

- wkcc\_\_ActionType\_\_c
- wkcc\_\_ActionApiName\_\_c
- wkcc\_\_ActionInputVariables\_\_c

[Workplace Command Center for Work.com Developer Guide: Task](#)

### Employee

Use this new field on the Employee object to define roles, such as student. Send surveys to recipients with a specific role at a location.

- `wkcc__IndividualRole__c`

[Workplace Command Center for Work.com Developer Guide: Employee](#)

### New Custom Objects and Platform Event

- `wkcc__CmdCtrLog__c`: Stores log messages (errors and exceptions) from Workplace Command Center and Wellness Check.
- `wkcc__CmdCtrLogEvent__e`: Platform event to ensure asynchronous capture of log messages.
- `wkcc__CommandCenterMapping__c`: Stores the mappings for all tabs in the Command Center Mappings app.
- `wkcc__WorkQueueItem__c`: Coordinates Work.com-related processing, such as sending surveys.

[Workplace Command Center for Work.com Developer Guide: Custom Objects](#)

### New Custom Metadata Type

- `wkcc__CmdCtrLogSettings__mdt`: Configures logging in Workplace Command Center and Wellness Check.

[Workplace Command Center for Work.com Developer Guide: Custom Metadata Types Used by Work.com](#)

## June 18, 2020

This release includes these new features and behaviors.

- Sort the Wellness Status by Location by column.
- Added more languages for Employee Wellness Check surveys.
- Added support for more languages in the Workplace Command Center UI.
- Improved documentation for surveys sent in languages other than English to ensure that recipients see the correct text. For more information, see [Manage Employee Wellness Check Survey Translations](#).
- Improved the presentation of the link to the survey that employees see in the default email template.
- Added support for automatically updating `User.IndividualID` when `Employee.Individual` is inserted or changed.
- Configure the batch size for sending surveys in Setup under Custom Settings or with the `wkcc__Settings__c.SendSurveyBatchSize__c` custom object API.
- Sending surveys from child locations now allows for including employees from locations lower in the hierarchy.
- The Send Survey user interface now indicates if you are attempting to send surveys to Employees without email addresses.