Central Intake Management Application Installation Instructions

Register for a FREE Salesforce Developer Edition Environment

1. Navigate to https://developer.salesforce.com/signup

2. Complete the registration page for a new Salesforce developer edition environment

3. Navigate to http://login.salesforce.com and login with your user name and password

Install the Central Intake Application Package

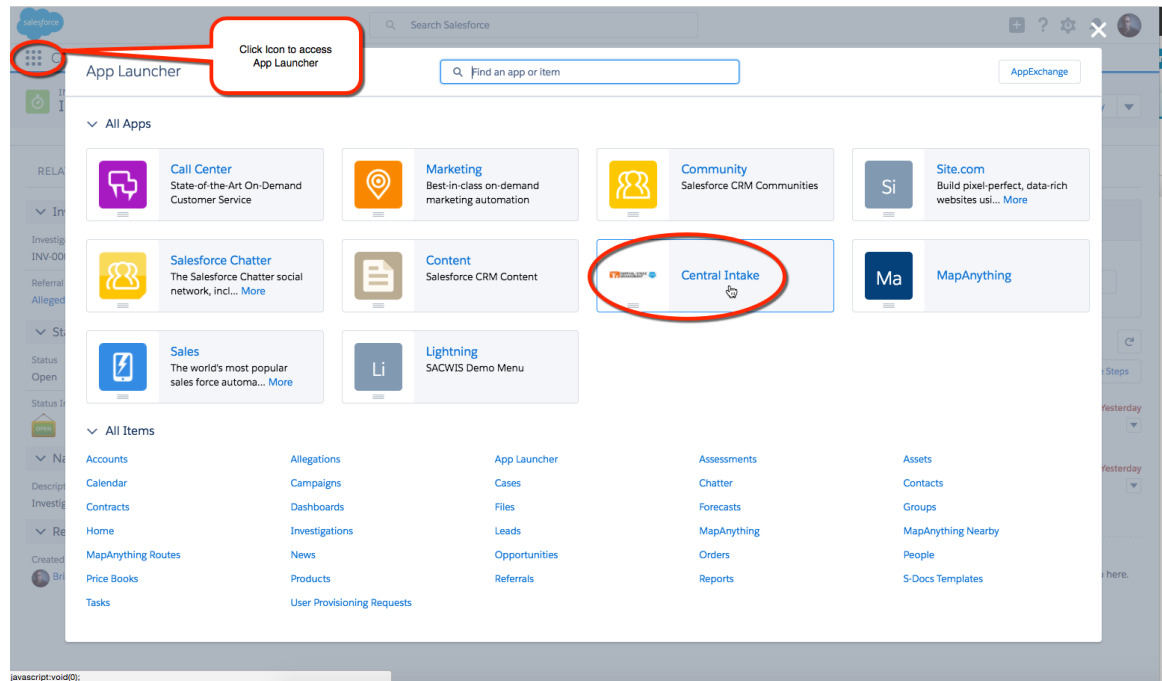4. Once logged in, copy/paste the Central Intake Application "package" URL into your browser URL:

   ```
   https://login.salesforce.com/packaging/installPackage.
   apexp?p0=04t15000000AWWc
   ```

5. In the install wizard, select "Install for All Users" and click Install

6. Once the installation is complete, your Central Intake application is accessible in the Salesforce "App Launcher".
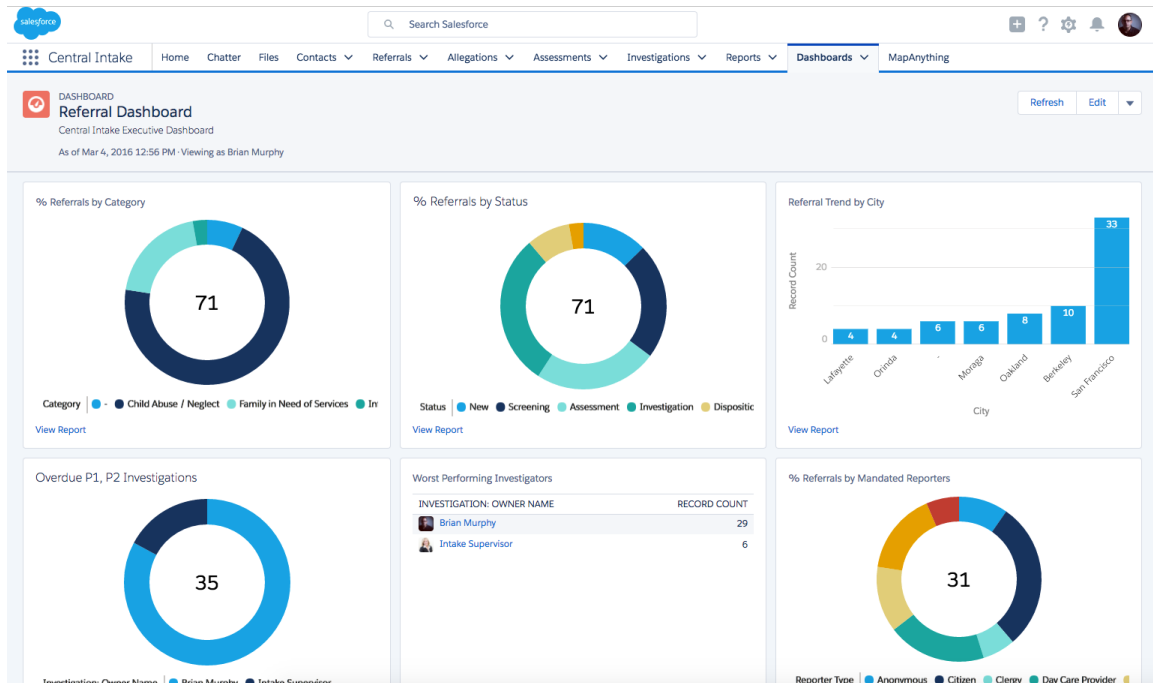
Central Intake on Salesforce

You now have access to the complete power of the Salesforce App Cloud (Force.com) platform and can use its application services to further enhance the Central Intake Management module through declarative configuration ("clicks, not code") for your specific business process.

For more information on this application, please see the Salesforce Central Intake Management Developer's Workshop Guide at: https://sfdc.co/bWQEuU

Sample Central Intake Screens

Referral Dashboard

Intake (Referrals)

Referral Details

Search Salesforce

Central Intake | Home | Chatter | Files | Contacts ⌄ | Referrals ⌄ | Allegations ⌄ | Assessments ⌄ | Investigations ⌄ | Reports ⌄ | Dashboards ⌄ | MapAnything

REFERRAL
Alleged Neglect - Alec Wintering

✓ Following | Edit | New Allegation | New Note | ⌄

DETAILS | RELATED

ACTIVITY | CHATTER

New Event | New Task | Log a Call

Subject

Filter Timeline ⌄

Next Steps | More Steps

Referral Id	Owner
REF-000092	New Referral Queue
Referral Name	Date Reported
Alleged Neglect - Alec Wintering	12/6/2016
Summary	Date Occured
Alleged neglect of a minor child. Child was left alone for 2 days reported by a neighbor	12/3/2016
Category	Sub-category
Child Abuse / Neglect	Neglect
Status	Response Priority
Investigation	P1
Status Indicator	Priority Indicator

✓ Document Allegations — Dec 6
Add allegations, alleged victims and alleged offenders

✓ Document & Complete Referral Record Data — Dec 6
Please document all Referral Data including reporting party, c...

Past Activity

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

⌄ Reporting Party Information

Reporting Party	Mandated Reporter
Jamie Francis	☑
Reporter Type	
Legal Personnel	

⌄ Screening Decision

Screening Decision | Screening Decision Comments

Referral Related Lists

Search Salesforce

Central Intake | Home | Chatter | Files | Contacts ⌄ | Referrals ⌄ | Allegations ⌄ | Assessments ⌄ | Investigations ⌄ | Reports ⌄ | Dashboards ⌄ | MapAnything

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Subject

Filter Timeline ⌄

Next Steps | More Steps

📋 Allegations (1) — New

ALLEGATION ID	CREATED DATE	TYPE	SUB-TYPE	
ALLEG-000023	12/6/2016 8:31 AM	Neglect	Physical Neglect	⌄

View All

✓ Document Allegations — Dec 6
Add allegations, alleged victims and alleged offenders

✓ Document & Complete Referral Record Data — Dec 6
Please document all Referral Data including reporting party, c...

📊 Assessments (1) — New

ASSESSMENT ID	ASSESSMENT DATE	RECORD TYPE	RISK ASSESSMENT SCORE	
ASSESS-000021	12/6/2016	Safety Assessment	0	⌄

View All

Past Activity

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

🕐 Investigations (2) — New

INVESTIGATION ID	DESCRIPTION	DUE DATE	STATUS	
INV-00083	Investigation created for associated Referral by Lightnin...	12/7/2016	Open	⌄
INV-00084	Investigation created for associated Referral by Lightnin...	12/7/2016	Open	⌄

View All

📎 Notes & Attachments (0) — Upload File

Allegation

Investigation

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