

Admin Console

Important

The Admin Console should only be used to expose and modify Custom Settings and Metadata Types. Restricted actions like creation/modification of picklist values, modification of field labels/APIs, modification of Permissions etc. will not be supported and requires assistance from a Salesforce System Administrator of that org. Please work with the SA on the project to coach the customer to draw the line between what will be a "Skedulo Configurable Setting" and what will the customer have to rely on the Salesforce Administrator.

Authors

[Duy Vo](#) 1 (1812 days ago),[Emily Hay \(Unlicensed\)](#) 1 (1870 days ago),[Scott Gassmann](#) 1 (1019 days ago),[Suraj Philips \(Unlicensed\)](#) 1 (1862 days ago)

Overview

The Admin Console is a page targeted towards Super-users or Skedulo Administrators who are not Salesforce Administrators, primarily for customers with custom Salesforce solutions. This scenario typically comes up for larger customers with complex solutions and do not wish to provide access to the Salesforce Setup and Configuration pages. For a Skedulo Administrator to be truly self-reliant and manage the Skedulo solution, access to Custom Settings and Metadata types is important as the Skedulo CX team strives to develop solutions that are scalable in the long term and are flexible, driven off the aforementioned Custom Settings and Metadata Types.

Bonus: Allows enforcement of dependencies, validation rules and tooltips (currently not supported by Salesforce for Custom Settings and Metadata types)

Problem Statement

Often in Skedulo Implementations, there are users who are not Salesforce System Administrators but are "Scheduling Administrators" that are responsible for how Skedulo operates within the context of their Salesforce deployment. Some Skedulo Settings are only available within the Setup Menu of Salesforce and the Admin console enables these power users to make configuration changes that impact how their Skedulo implementation functions. In addition to this, the admin console is a great place to store additional configuration settings that are unique to a given customers deployment.

Components

- Custom Fields
- Custom Setting
- Custom Objects
- Custom Metadata Types
- Apex Classes
- Visualforce
- Triggers

The screenshot shows the 'Mobile Lookup Field Settings' page in the 'Bolt Accord Care' system. The sidebar on the left contains navigation links: 'Admin Settings', 'Permissions Settings', 'Expense Settings', 'Location Settings', 'Audit Settings', 'Assessment Prep Test (Stokely Mobile)', 'Mobile Sync Settings', 'Lone Worker Alert Settings', 'Service User Field Mapping', and 'Mobile Lookup Field Settings' (which is highlighted). The main content area has a header 'Mobile Lookup Field Settings' and a form with two input fields: 'SELECT ANY NAME' and 'LABEL FIELD ANY NAME'. Below these fields are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red border. The top of the page shows the 'Bolt Accord Care' logo and a navigation bar with links: 'Home', 'Enquiries / Network', 'Service Information', 'Accounts', 'Engagement Console', 'Resources', 'Resource Availability by Console', 'Accident & Incidents', 'Audit', 'Admin Console', and 'More...'. The 'Admin Console' link is highlighted.

The screenshot shows the 'Bon Accord Care' admin interface. The top navigation bar includes links for Home, Enquiries / Referrals, Service Information, Accounts, Exception Controls, Reservations, Resource Availability Controls, Accident & Incidents, and Audits. A search bar is also present.

The left sidebar contains the following menu items:

- Bon Accord Care**
- Quick Find**
- ADMINISTRATION**
 - Admin Settings
 - Resource Availability Controls Settings
 - Account Availability Controls Settings
 - Event Type Settings
 - Permissions Settings
 - Expense Settings
 - Location Settings
 - Audit Settings
 - Assessment Prep Test (Checklist Module)
 - Mobile Sync Settings
 - Low Worker Alert Settings
 - Service User Field Mapping**
 - Mobile Lookup Field Settings

The main content area displays the 'Service User Field Mapping' configuration. It consists of two side-by-side tables:

SERVICES USER FIELD NAME	SERVICE USER FIELD NAME	Action
Ethnicity	Race/Ethnic	[Edit] [Delete]
Account Details	Access to Property	[Edit] [Delete]
G/P Practice	G/P Practice	[Edit] [Delete]
Gender	Gender	[Edit] [Delete]
Name (FNU)	Name	[Edit] [Delete]
Do you (or Referred user above)?	Does the Service User Use Above?	[Edit] [Delete]
First Line of Address	Street	[Edit] [Delete]
Relationship to Referrer (INDO)	Relationship to Service User	[Edit] [Delete]
Last Name	Last Name	[Edit] [Delete]
Name (Main-Care)	Name	[Edit] [Delete]
Name (INDO)	Name	[Edit] [Delete]
Contact Number (Main-Care)	Contact Number	[Edit] [Delete]
Post Code	Post Code	[Edit] [Delete]

The screenshot displays the Bon Accord Care Admin Console interface. The top navigation bar includes links for Home, Enquiries / Referrals, Service Information, Accounts, Exceptional Circumstances, Resources, Resource Availability Console, Accident & Incidents, Audit, Admin Console, and More... A search bar is located at the top center.

The left sidebar contains the following menu items:

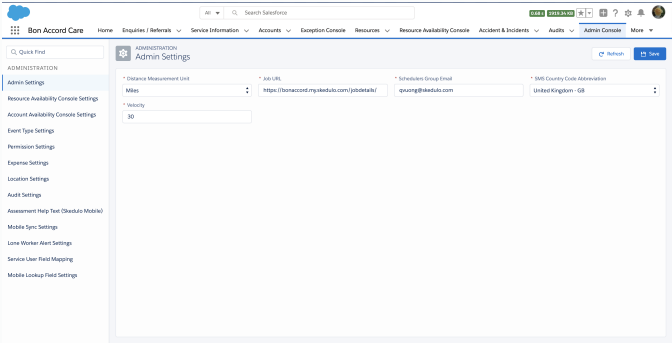
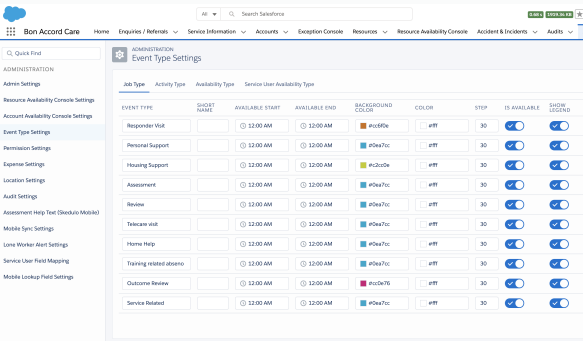
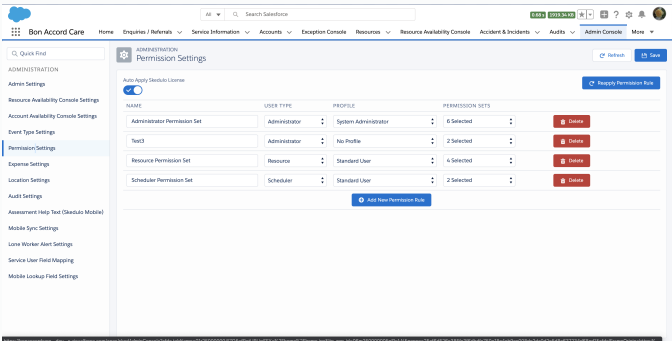
- Bon Accord Care**
- ADMINISTRATION**
 - Admin Settings
 - Resource Availability Console Settings
 - Assessment Help Text (Skelduo Mobile)
 - Mobile Sync Settings
 - Low Voltage Alarm Settings
 - Service User Field Mapping
 - Mobile Lookup Field Settings

The main content area shows the "Assessment Help Text (Skelduo Mobile)" page. It features a table with columns for FIELD (API NAME) and HELP TEXT. Each row has a red button labeled "Delete".

FIELD (API NAME)	HELP TEXT	Action
Recorded Name in Situ	Record the number of telephone lines in situ.	Delete
Telephone Sockets in Use	Record the number of telephone lines in use.	Delete
Telephone Supplier	Record the telephone supplier.	Delete
Issues and Wires Related to Telephone	Detail any issues or risks identified.	Delete
Requirements if Main Cable not Available	Record what arrangements are in place for food to be put in place if main cable is unavailable.	Delete
Care Provided by Main Carer	Describe care provided by the carer.	Delete
Current Care Management Issues	Record whether there are any issues with the Service User's current caring arrangement.	Delete
Adult Carer Support Plan Offered	Record whether the carer has been offered an adult carer support plan, if relevant.	Delete
Other Professional Involved	Record details of any other professionals who have contributed to this assessor.	Delete
Benefits	Record details of any existing social security benefits.	Delete
Finance	Record how the Service User manages their finances.	Delete
	Record the Service User's financial situation.	Delete

The screenshot shows the 'Bon Accord Care' admin interface. The top navigation bar includes links for Home, Accounts & Referrals, Service Information, Accounts, Exception Controls, Resources, Resource Availability Console, Accident & Incidents, Audit, and a User profile icon. Below the navigation bar, there's a sidebar menu with options like Admin Settings, Resource Availability Console Settings, Event Type Settings, Permission Settings, Expense Settings, Location Settings, and Audit Settings (which is highlighted). The main content area displays the 'Audit Settings' configuration, featuring a table with columns for Bands Name, Min Score, and Max Score. The table lists four bands: Blue (Min: 75, Max: 100), Green (Min: 50, Max: 75), Amber (Min: 25, Max: 50), and Red (Min: 0, Max: 25).

BANDS NAME	MIN SCORE	MAX SCORE
Blue	75	100
Green	50	75
Amber	25	50
Red	0	25



Setup Instructions

There isn't a "standard definition" of the admin console so please review the code repo's of the previous implementations (which can be found linked below) and discuss any new implementation with the CX Project Development team prior to estimating a new implementation of the Admin Console.

Links

Name	Link
Salesforce Extension Record	https://sked.lightning.force.com/lightning/r/Asset__c/a2d900000048tp2AAA/view
B Braun Code Repo	https://bitbucket.org/skeduloservices/bbraun_dev/src/22c1d0e78290/src/?at=master
Bon Accord Care Code Repo	https://github.com/Skedulo/bondaccor