

RESONATE CX | NPS, CSAT, 5-STAR, & CES SURVEYS FOR SALESFORCE

1. OVERVIEW

1.1. Project Description

Resonate's Salesforce Integration creates an optimised user experience by (1) simplifying the survey dispatch and (2) creating a seamless experience in closing the loop on the responses and analysing customer responses.

- (1) It removes the need for contact/account file exports – enabling a simpler and more cohesive survey dispatch flow.
- (2) It unifies the analytical capabilities of Resonate's Portal with the transactional capabilities of Salesforce enabling customers to close the loop entirely inside of Salesforce, while keeping the analytical portal up to date with case updates.

1.2. High-level requirements

The integration should:

- Pull objects from Partner Customer's Salesforce instance to use for sending out surveys.
- Keep Salesforce & Resonate Portal in-sync.
- Push responses and related information (such as optouts) to Salesforce.

1.3. Deliverables

- Standard package, containing the Survey Response, Survey Answers, and Survey objects. Loading contacts & accounts from Salesforce to send out as a touchpoint/relationship program.
- Syncing and custom integrations; synchronizing between Resonate and Salesforce for case comments and common updates. The addition of Opt-out objects in Salesforce. The historical push of all existing survey responses.

1.3. Security & Principles

- We fetch the minimal fields required from Salesforce to establish the integration.
- Our default permissions are restrictive and do not give us access to objects outside of Contact, Case, and Account by default. We do not have delete or edit permission for any standard objects by default except for cases (where we have the standard edit permission only).
- We recommend a specific user is set up for Resonate's integration to ensure that permissions are as restrictive as possible.
- We do not define any custom fields on standard objects.
- It is up to the Partner Customer to define tabs, permissions, and any custom layouts they want for Resonate's custom objects. Importantly, it should be configured such that users cannot modify/delete survey responses, survey answers, or optouts.
- A user must have a Resonate account for them to be able to access the Resonate Portal.