



Upfront Healthcare

Admin & User Documentation

V1.1

AQUIVA LABS

Version History

Version	Date	Author	Description
1.0	07.08.2024	Nikolay Ermakov	Initial version
1.1	08.13.2024	Nikolay Ermakov	Survey result flow was added

Summary	4
Admin Setup	4
Permission sets	4
Integration settings page - Upfront Admin tab	5
Object and field mapping	5
Settings for Intelligent default segmentation	6
Authorization page - Upfront Admin tab	7
Batch scheduling for Intelligent default segmentation	7
Adding related lists layout for Contact or Person Account	8
Adding survey component to Experience cloud page	9
Add required permissions to work with survey for community users	12
Define a template for survey email	14
Check the sharing rules for Upfront psychographics and Upfront Segment History	15
Debug mode in Environment setting	15
Logs tab	16
Business user	17

Summary

The main goal of the Upfront Healthcare application is to help healthcare companies to get psychographic segmentation for patients based on Upfront services. Also, the application provides capabilities to store segmentation results and send segmentation surveys for patients.

Admin Setup

As a System admin of the Upfront healthcare application, there are some necessary setup steps to ensure. To use the application for psychographic segmentation the following steps are required:

1. Assign permissions to users in order to get application access;
2. Define mapping for intelligent default segmentation;
3. Specify the intelligent default segmentation settings;
4. Specify endpoints and API keys;
5. Schedule a batch for periodic Intelligent default segmentation;
6. Add related list layout to patient record;
7. Add Survey component to Experience cloud page;
8. Assign permission for Experience cloud community users;
9. Define template for Survey email;
10. Check the sharing rules for Upfront psychographic and Upfront Segment history objects;
11. Activate Debug mode in case of troubleshooting;

Permission sets

The application includes two different permission sets which should be assigned to all users that use the application. The recommended uses and descriptions are outlined in the table below:

Permission Set	Description	Recommended Assignment
UpfrontBusinessUser	Includes read access to Upfront objects and classes for getting data about patient segmentation.	• Business users (including Experience cloud users) • Guest user (if it's used in Experience cloud)
Upfront Admin	Includes full access to Upfront objects and records. This permission set is not intended for typical business users but exists to enable integrations and mappings.	• System admins

Integration settings page - Upfront Admin tab

Object and field mapping

In order to define required mapping for Intelligent default segmentation as a first step you need to select which object represents a patient record. There are two available options:

- Contact;
- Person account;

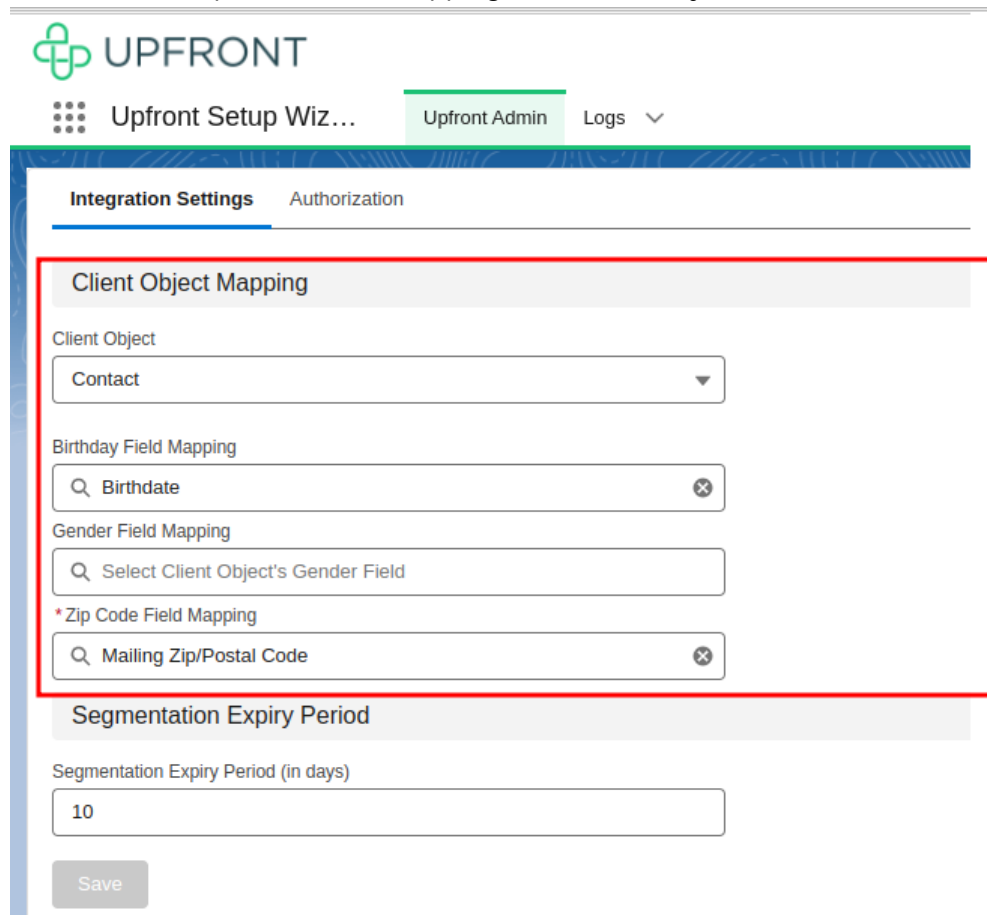
As soon as a patient object is selected mapping fields will be prepopulated with standard default ones. You need to check the proposed mapping and adjust if it's required.

Note: ZIP code field is mandatory for Intelligent default segmentation and can't be skipped.

Patients without ZIP code value will not be added to the batch and will not have Intelligent default segmentation.

Note: Please be aware that access to the default field Gender Identity should be configured in advance(if you are going to use this field for gender mapping). Otherwise it won't be available in the mapping section.

Here is an example of default mapping for Contact object:



The screenshot displays the Upfront Admin interface. At the top, there is a navigation bar with the Upfront logo, a menu icon, and links for 'Upfront Setup Wiz...', 'Upfront Admin' (which is highlighted), and 'Logs'. Below the navigation bar, there are two tabs: 'Integration Settings' (active) and 'Authorization'. The main content area is titled 'Client Object Mapping' and is enclosed in a red rectangular box. Inside this box, there are four mapping sections: 'Client Object' with a dropdown menu set to 'Contact'; 'Birthday Field Mapping' with a search input containing 'Birthdate'; 'Gender Field Mapping' with a search input containing 'Select Client Object's Gender Field'; and '* Zip Code Field Mapping' with a search input containing 'Mailing Zip/Postal Code'. Below the red box, there is a 'Segmentation Expiry Period' section with a text input field set to '10' and a 'Save' button at the bottom left.

Settings for Intelligent default segmentation

There are several parameters which influence on batch job execution:

1. **Segmentation Expiry Period** - it's a period after which intelligent default segmentation will be considered as outdated. After that period patient record will be added to the batch job even if it has intelligent default values. Default value for expiry period is 365 days, but you can adjust it if necessary:
2. **Batch Job Reschedule Quantity** - One batch run will process 20 000 records. Using this parameter you can define how many times a batch job will be auto-rescheduled. For example if value is 3 then you will process 60 000 records in total per one scheduled job. Max value for this setting is 5 or 100 000 records.
3. **Client Record Types** - Using this setting you can define which record types of Contacts/Person Accounts should be queried for the batch job execution. It could help if some record types shouldn't be segmented.
4. **Flag Field for Intelligent default segmentation** - This setting was added in order to provide a flexibility to filter client records. You can use any existing boolean field or create a new formula field with checkbox type on Contact/Person Account object to define your customer filter for Intelligent default segmentation. If this setting is defined with a field only true-valued customer records will be queried for a batch job execution.

The screenshot displays the Upfront Admin interface. At the top, there is a navigation bar with the Upfront logo, a 'Upfront Setup Wiz...' button, and tabs for 'Upfront Admin' and 'Logs'. Below the navigation bar, the 'Integration Settings' section is active, with a sub-tab for 'Authorization'. The 'Client Object Mapping' section is visible, showing a dropdown for 'Client Object' set to 'Person Account'. Below this, there are fields for 'Birthday Field Mapping', 'Gender Field Mapping', and 'Zip Code Field Mapping'. The 'Segmentation Parameters' section is highlighted with a red box and contains the following settings: 'Segmentation Expiry Period (in days)' set to 1, 'Batch Job Reschedule Quantity' set to 5, 'Client Record Types' set to 'PersonAccountNoRecords', and 'Flag Field For Intelligent Default Segmentation' with a search field. A 'Save' button is located at the bottom of the Segmentation Parameters section.

Note: After any change in settings please don't forget to use the 'Save' button.

Authorization page - Upfront Admin tab

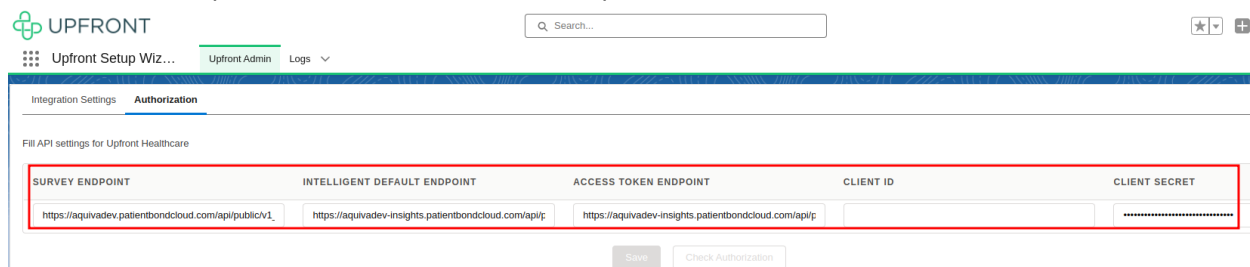
On this page you need to specify your Upfront endpoints:

- Survey result;
- Initial default segmentation;
- Access token;

For Access token endpoint you need to specify client id and client secret. You can use the “Check authorization” option to establish a connection and get an access token.

Note: Client secret is stored securely and is not available in UI after the setting is saved. So if you want to change any detail in endpoints you need to enter client secret as well.

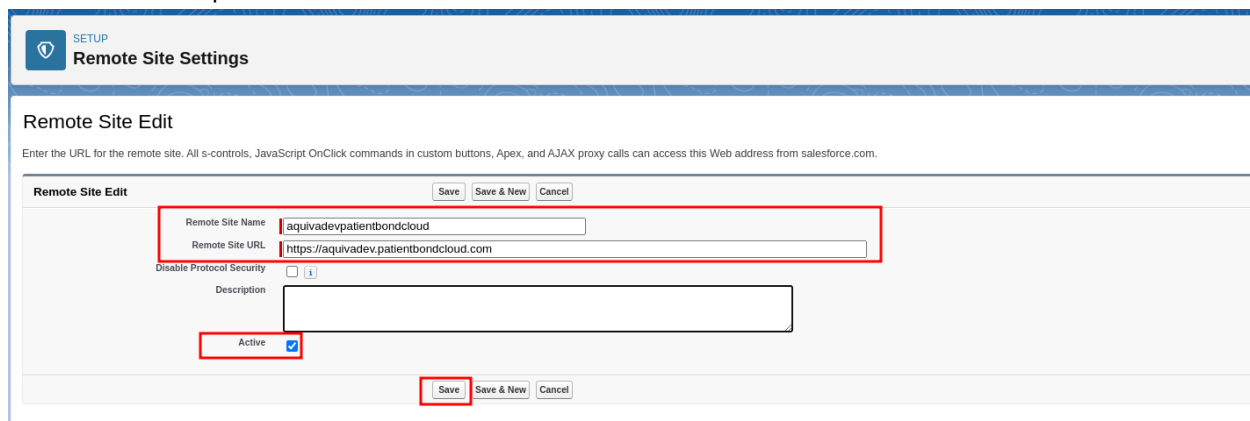
Here is an example of saved details of API endpoints:



The screenshot shows the Upfront Admin interface with the 'Authorization' tab selected. The page title is 'Integration Settings | Authorization'. Below the title, it says 'Fill API settings for Upfront Healthcare'. There is a table with five columns: 'SURVEY ENDPOINT', 'INTELLIGENT DEFAULT ENDPOINT', 'ACCESS TOKEN ENDPOINT', 'CLIENT ID', and 'CLIENT SECRET'. The first three columns contain URLs: 'https://aquivadev.patientbondcloud.com/api/public/v1', 'https://aquivadev-insights.patientbondcloud.com/api/p...', and 'https://aquivadev-insights.patientbondcloud.com/api/p...'. The 'CLIENT ID' column is empty, and the 'CLIENT SECRET' column contains a series of asterisks. Below the table are 'Save' and 'Check Authorization' buttons.

In order to have access to the add endpoints you need to add a record with the endpoint URL to the “**Remote site settings**” in Setup.

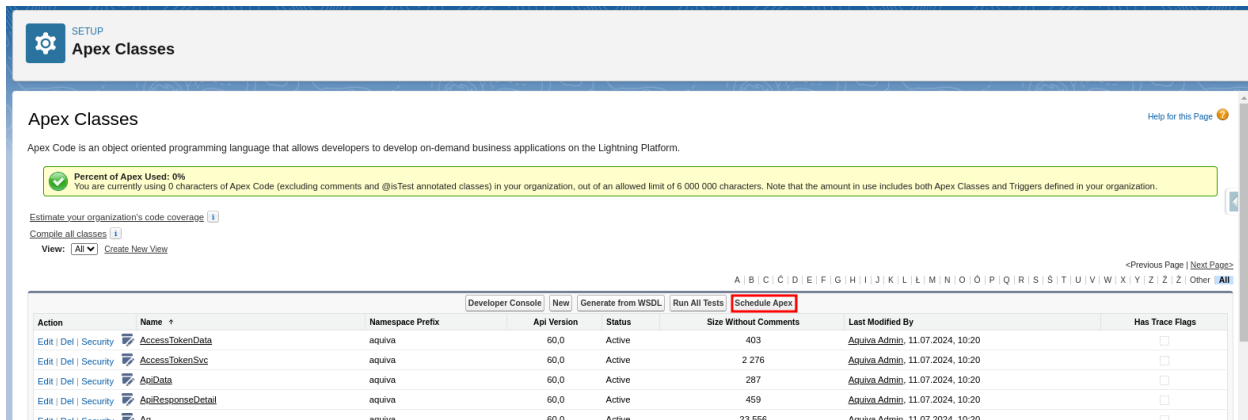
Here is an example of such record:



The screenshot shows the 'Remote Site Edit' page in Salesforce Setup. The page title is 'Remote Site Edit'. Below the title, it says 'Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.' There is a 'Remote Site Edit' section with a 'Save' button. Below this, there are fields for 'Remote Site Name' (aquivadevpatientbondcloud) and 'Remote Site URL' (https://aquivadev.patientbondcloud.com). There is a 'Disable Protocol Security' checkbox (unchecked) and a 'Description' field. At the bottom, there is an 'Active' checkbox (checked) and a 'Save' button.

Batch scheduling for Intelligent default segmentation

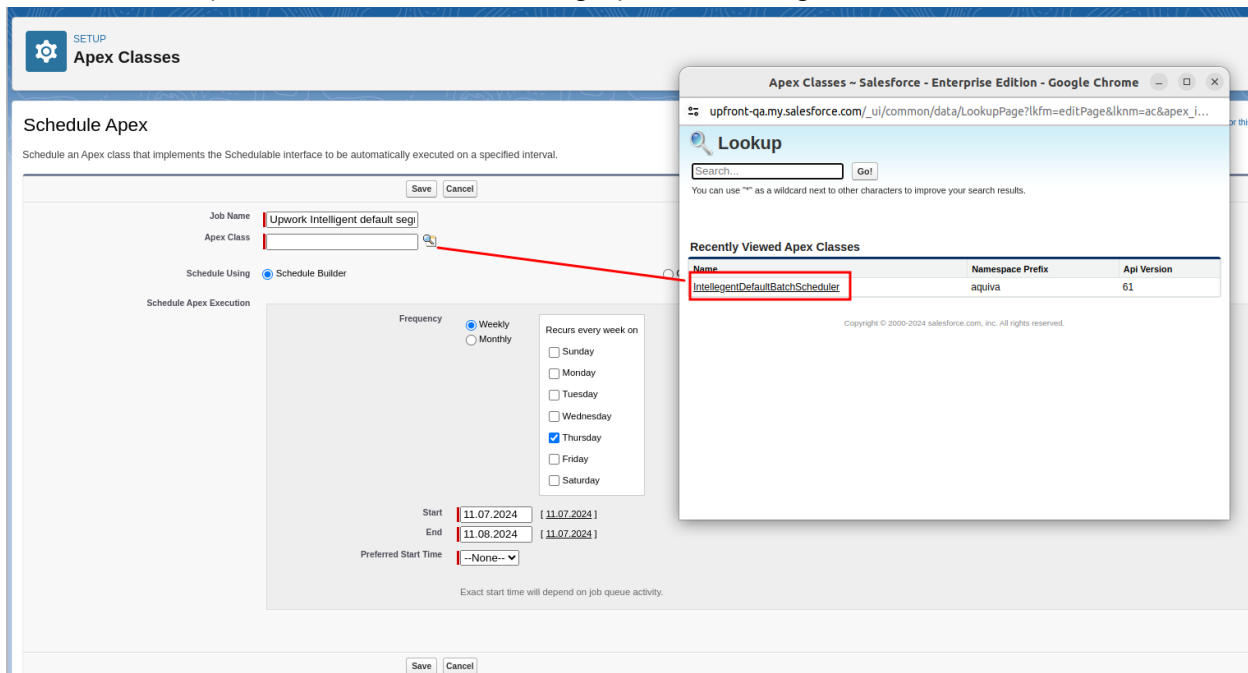
To start getting Intelligent default segmentation you need to schedule a batch job. In order to do it please use **Setup - Apex Classes - Schedule Apex** option:



Please add Job name, select **IntelligentDefaultBatchScheduler** Apex class and specify the schedule before saving the batch.

Note: It is recommended to schedule a daily batch run

Here is an example how to select class during Apex scheduling:



Note: Batch is processing 20k records per run.

Adding related lists layout for Contact or Person Account

In order to have an option to check psychographic segmentation from a patient record you need to add related lists to your Contact or Person Account layout. There are two objects to be added to related lists: **Upfront psychographics** and **Upfront Segment History**

For **Upfront psychographics** the following fields could be added on related list:

- Upfront psychographics Name;
- Relevant date;
- Source;

For **Upfront Segment History** the following fields could be added on related list:

- Upfront Segment History Name;
- Segment source;
- Old segment;
- New segment;

Here is an example how to add required lists and fields for Contact object (start from object manager):

Save

Quick Save

Preview As...

Cancel

Undo

Redo

Layout Properties

Fields

Buttons

Custom Links

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Quick Find

Related List Name

Action Plans

Campaign History

Activity History

Approval History

Assets

Campaign History

Cases

Content Deliveries

Data Integration ...

Document Checklis...

Email Sends

Entitlements

Files

Groups

HTML Email Status

Individual Email ...

Notes & Attachments

Open Activities

Opportunities

Service Contracts

SMS Sends

Social Personas

Social Posts

SOS Sessions

Uplift Psychogra...

Uplift Segment H...

Work Orders

Related Lists

Uplift Psychographics

Uplift Psychographics Name

Sample Text

Uplift Segment History

Uplift Segment History Name

Sample Text

Email Sends

Email Send Number

Email Name

Business Unit

Created Date/Time

Send Status

Status Date/Time

From Name

From Email

Campaigns

Reports

Individual Email Results

Email Name

Sample Text

Open Activities

Adding survey component to Experience cloud page

In order to send a link with a survey to a customer you need to publish a page with the required component in your experience cloud.

Please do the following steps:

1. Define in which Experience cloud you are going to add a page and open Builder (**Setup - Digital experiences - Community** - Click "Builder"):



SETUP

All Sites

Digital Experiences

Visit our Trailblazer Community Help for this

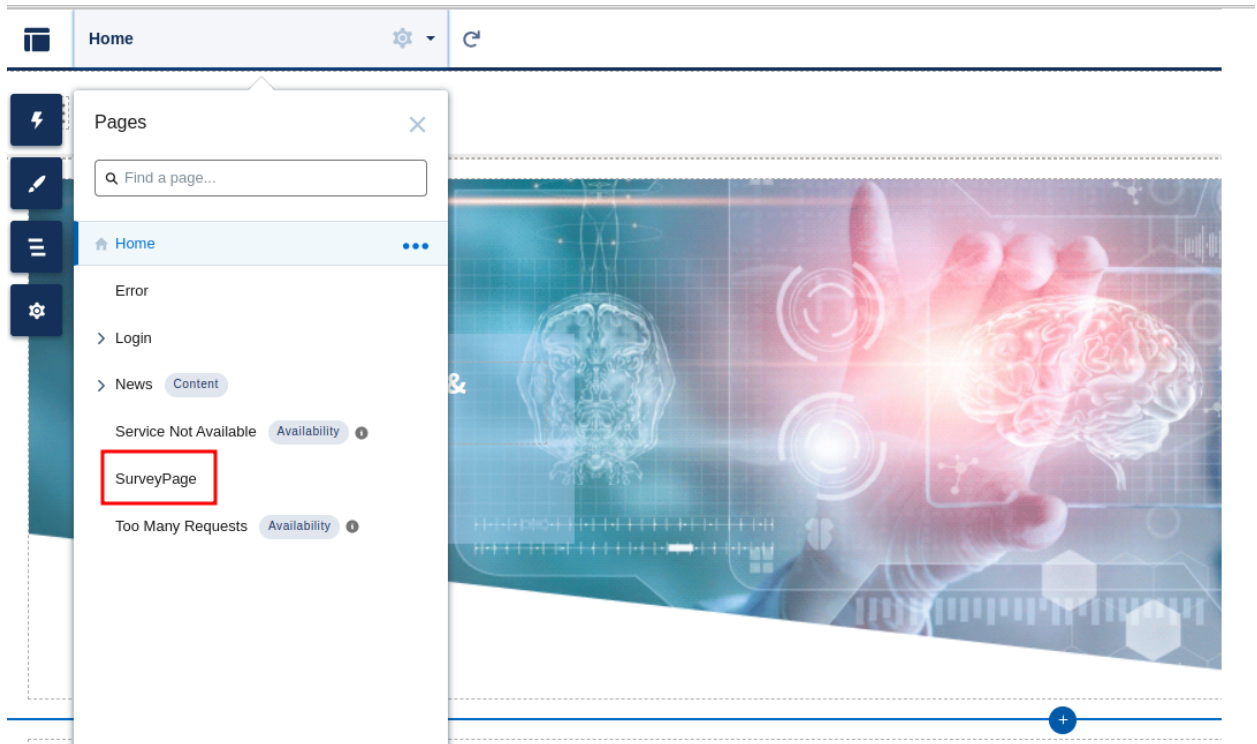
The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the [Digital Experience app](#) in [Lightning Experience](#) page to see your archived sites.

Maximum number of published and unpublished sites: 100

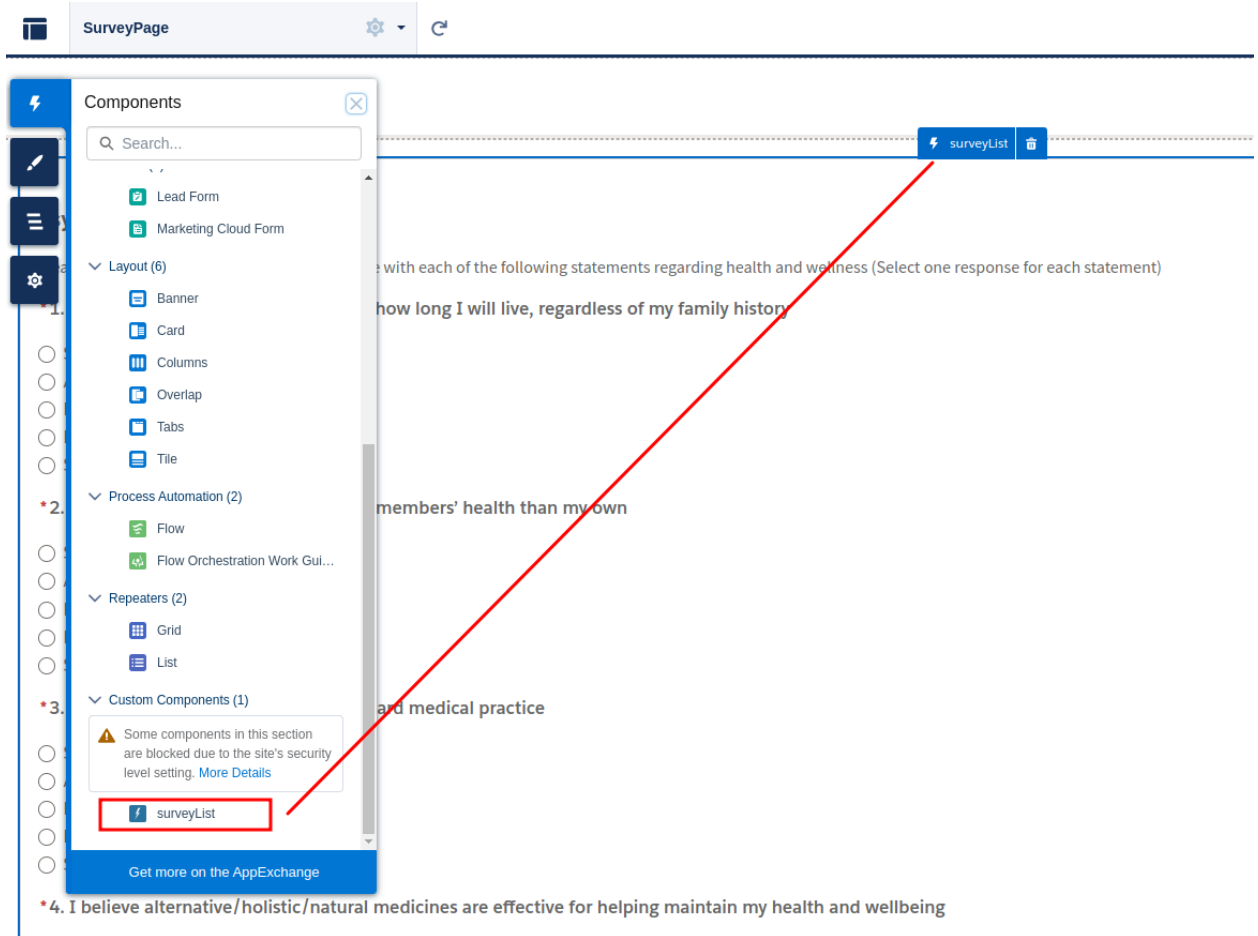
All Sites						
Action	Name	Description	Framework	URL	Status	
Workspaces	Builder	emptytest	Lightning Web Runtime	Enhanced	https://adfront-pa.my.site.com/emptytest	Active
Workspaces	Builder	survey	Lightning Web Runtime	Enhanced	https://adfront-pa.my.site.com/survey	Active

2. Create or select a page where the Survey should be located.

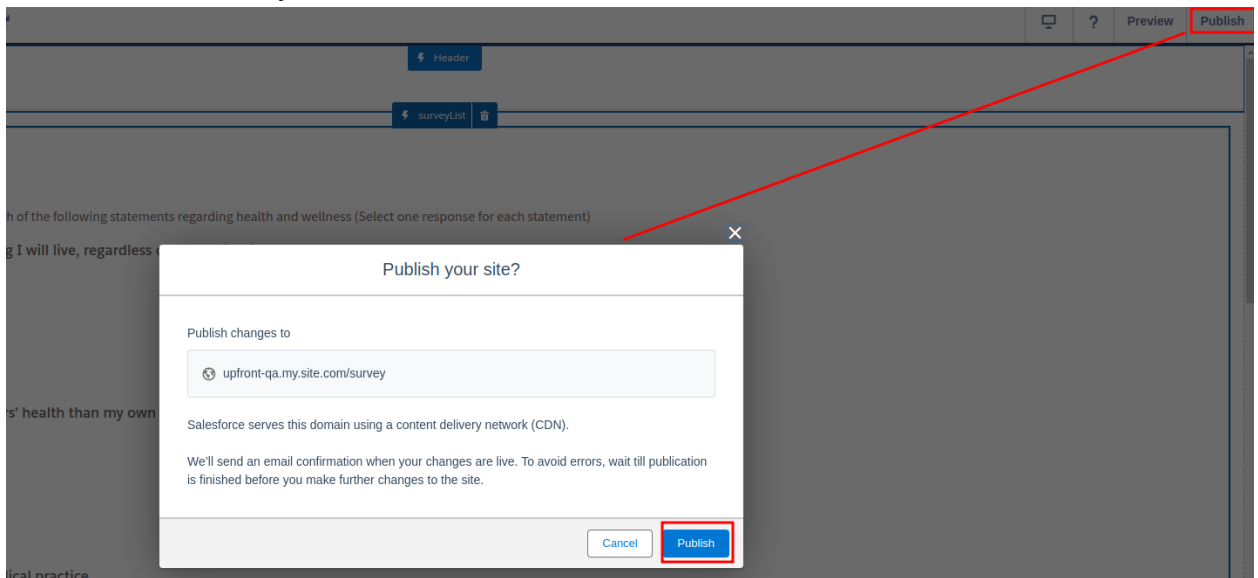
Here is an example of a page with name “SurveyPage” added to the community:



3. Add **SurveyList** component from the Custom components to the page layout:



4. Publish the community:



Your page is ready to process survey results.

Add required permissions to work with survey for community users

In order to submit surveys you Experience cloud users should have appropriate access to Upfront objects:

1. Add Upfront permissions sets (**Upfront Admin**, **Upfront Business User**) as members of your community (Administration - Members):

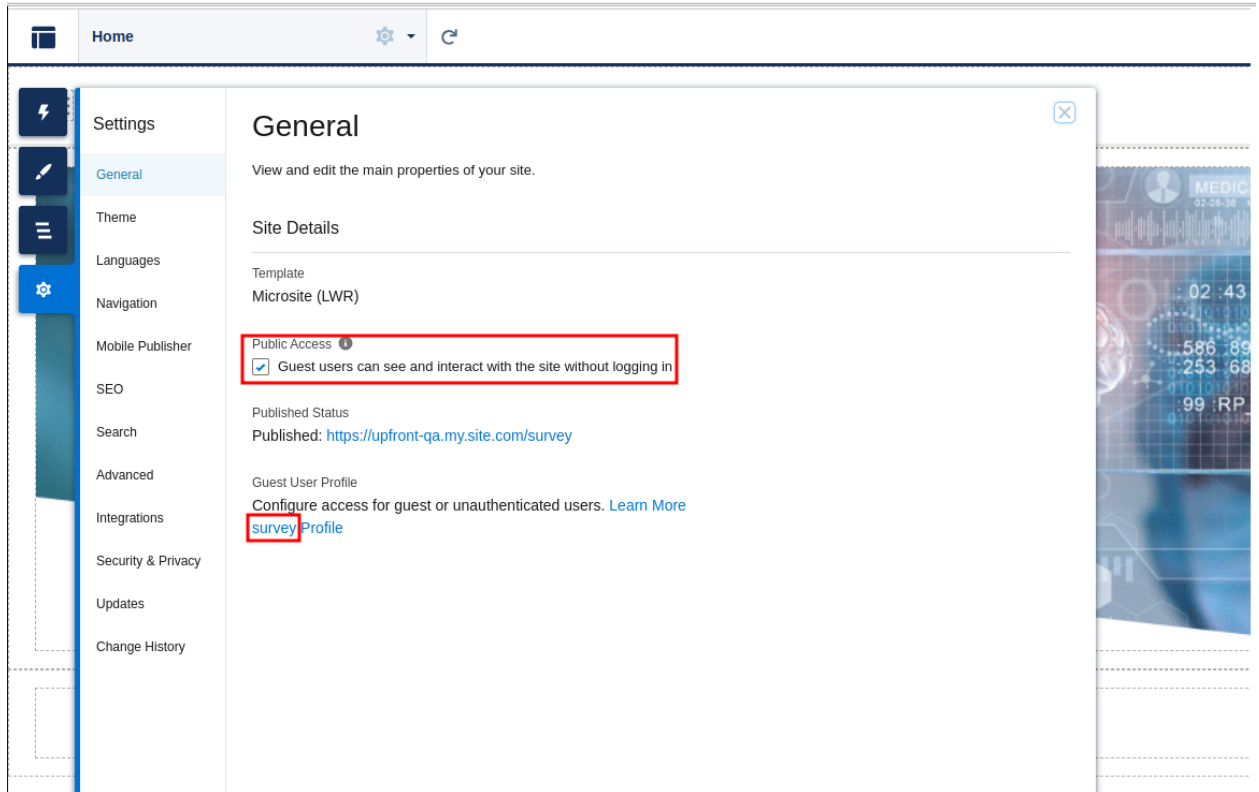
The screenshot shows the 'Administration' console with the 'Members' section selected. The left sidebar contains a navigation menu with options: Settings, Preferences, Members (highlighted), Contributors, Login & Registration, Emails, Pages, and URL Redirects. The main content area is titled 'Members' and includes a sub-header 'All users with the selected profiles OR permission sets are members.' Below this is a blue information box stating: 'When you add a profile or permission set, new site members receive a welcome email message. If you want to prevent those site members from receiving welcome email messages, deselect the Send welcome email option.' The 'Select Profiles' section has a search bar with 'Internal' selected and a 'Find' button. Below the search bar are two columns: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' list includes: Analytics Cloud Integration User, Analytics Cloud Security User, Chatter Free User, Chatter Moderator User, Chatter Only User, Contract Manager, Marketing User, Minimum Access - API Only Integrations, Minimum Access - Salesforce, Read Only, Solution Manager, and Work.com Only User. The 'Selected Profiles' list includes: System Administrator, Identity User, Standard User, Customer Community User, Customer Community Plus User, Customer Identity User, Customer Community Plus Login User, Standard Platform User, and Person Account Test 2. The 'Select Permission Sets' section has a search bar and a 'Find' button. Below the search bar are two columns: 'Available Permission Sets' and 'Selected Permission Sets'. The 'Available Permission Sets' list includes: AqLib Admin, DMTracking, Marketing Cloud Connected App, Marketing Cloud Connector, Marketing Cloud Connector Admin, Marketing Cloud Connector Partner Commu..., and Marketing Cloud System User. The 'Selected Permission Sets' list includes: Upfront Admin and UpfrontBusinessUser, which are highlighted with a red box.

2. Add permission set **Upfront Business User** to the users of your Experience cloud.

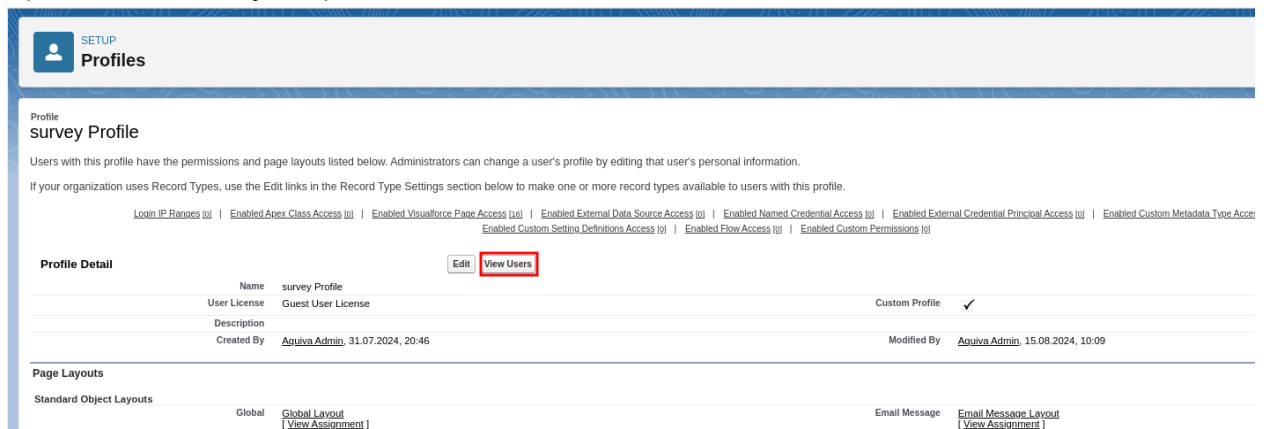
Note: If the guest mode is not enabled then you can assign permissions to users in standard way. If the guest mode is enabled please follow the instructions below.

Here is an example of how to add permission set to the quest user:

1. Open the profile which is used for guest account (**Builder - Settings - Guest profile**)



2. Open list of users by the profile:



3. Select guest user and assign permission set:



SETUP

Users

User

survey Site Guest User

[Permission Set Assignments \(1\)](#)
[Permission Set Assignments: Activation Required \(0\)](#)
[Permission Set Group Assignments \(0\)](#)
[Permission Set L](#)

Permission Set Assignments

Edit Assignments

Action	Permission Set Label	Date Assigned
Del	UpfrontBusinessUser	5.08.2024

Username

survey@00dd1000000azpxeai.org.force.com

Nickname

survey

Division

Time Zone

(GMT+00:00) Greenwich Mean Time (GMT)

Locale

Polish (Poland)

Language

English

Federation ID

App Registration: One-Time Password Authenticator

Define a template for survey email

In order to provide your client a link for a survey you need to prepare an email template with a link to your survey page within this template.

Step 1: Create an email template:

Here is an example of adding template for Contact object:

Email Template

Upfront Survey 3

Edit

Clone

Delete

Details

Related

Information

Email Template Name

Upfront Survey 3

Description

Made in Email Template Builder

☐

Related Entity Type

Contact

Folder

Public Email Templates

Message Content

Subject

Upfront HC Survey

Enhanced Letterhead

HTML Value

Link

Additional Information

Created By

Aquila Admin, 25.07.2024, 11:43

Last Modified By

Aquila Admin, 1.08.2024, 20:33

Note: Please be sure that template is shared properly and assign to correct customer object

Step 2: Add the correct link with specific format:

Note: You can form a template in any way you want according to your branding and internal rules. The only requirement is to have a link somewhere inside the template.

Link format: **“Basic Community URL”^“Path to Survey Page”?recordId=({{Recipient.Id}})**
({{Recipient.Id}}) - it is a standard merge field which is used in email templates. In our case it represents Contact or Person Account ID.
?recordId= - it is a fixed part of the string and used to get the record ID as parameter. Please be informed that it is case sensitive.

Here is an example of such link:

Message Content

Subject: Upfront HC Survey

Enhanced Letterhead: Search Enhanced Letterheads...

HTML Value

```
<html style="overflow-y: hidden;">
<head>
<title></title>
</head>
<body style="height: auto; min-height: auto;"><a href="https://upfront-ga.my.site.com/survey/surveypage?recordId=({{Recipient.Id}})">Link</a></body>
</html>
```

Annotations:

- Basic Community URL: `https://upfront-ga.my.site.com/survey`
- Survey page URL: `/surveypage`
- Parameter with Contact Id as merge field: `?recordId=({{Recipient.Id}})`

Check the sharing rules for Upfront psychographics and Upfront Segment History

By default both objects have a private sharing setting. If you need to change it please use **Setup-Sharing settings**:

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: Upfront Psychographics

Disable External Sharing Model

Default Sharing Settings

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Upfront Psychographics	Private	Private	✓

Other Settings

- Manager Groups: ☐ [i]
- Minimize the number of roles created, which improves performance by cutting down processing loads: ☒ [i]
- Grant site users access to related cases: ☒ [i]
- Secure guest user record access: ☒ [i]
- Require permission to view record names in lookup fields: ☐ [i]

Sharing Rules

Upfront Psychographics Sharing Rules [New] [Recalculate]

Debug mode in Environment setting

In case of troubleshooting API integration endpoints you can activate the Debug mode in Upfront application.

In order to activate it and add additional logs you need to adjust Environment setting in Setup - Custom settings and click “Manage”:

Custom Settings

Custom Settings

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

View: Alt [Create New View](#) [Get Usage](#)

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Del Manage	Environment	Public	Hierarchy	aquiva	Environment settings.	130	1	130
Manage	ET4AE Config	Public	List	et4ae5		355	0	0
Manage	ET4AE Configuration	Public	Hierarchy	et4ae5		1 429	1	1429
Del Manage	Upfront Global App Settings	Public	Hierarchy	aquiva	Upfront global application settings	1 327	1	1327

In Enviroient setting you need to activate Debug mode:

Custom Settings

Environment Edit

Provide values for the fields you created. This data is cached with the application.

Edit Environment
Save
Cancel

Environment Information

Location

Upfront Aquiva OA

Debug Mode

☒

Now Override

[19.08.2024, 10:45]

Today Override

[19.08.2024]

Here is an example of extended logs when Debug mode is active:

Log
L-000088
Edit
Delete

Details

Log Number	L-000088	Owner	Aquiva Admin
Level	Business		
Severity	Error		
Status	Open		
Document Viewer	aquiva.IntelligentDefaultBatch		

Details

Code

Related Record ID

Endpoint URL

Message

An external endpoint error occurred: [401] [{"error": "Could not find route for /api/public/v1_0_0/oauth?"}]

Detail

{"StackTrace": "Class: aquiva.BaseApi.verifyResponseCode: line 56, column 1\nClass: aquiva.BaseApi.handleApiResponse: line 41, column 1\nClass: aquiva.OAuthAPI.fetchAccessToken: line 30, column 1\nClass: aquiva.OAuthAPI.fetchAccessTokenWithSettingParams: line 18, column 1\nClass: aquiva.AccessTokenSvc.getAccessToken: line 23, column 1\nClass: aquiva.IntelligentDefaultBatch.fetchAccessToken: line 167, column 1\nClass: aquiva.IntelligentDefaultBatch.start: line 18, column 1\nLineNumber: 56"}

Logs tab

On this tab admin could find all logs from the Upfront HC application. Log records could be used in troubleshooting.

Here is an example of log record:

16

Log
L-000019

Details

Log Number

L-000019

Owner

Aquiva Admin

Level

Business

Severity

Error

Status

Open

Source

Details

Message

{\"error\": \"Invalid Credentials\"}

Detail

Created By

Aquiva Admin, 2.07.2024, 11:31

Last Modified By

Aquiva Admin, 2.07.2024, 11:31

Business user

Business users have an ability to check results of segmentation. Based on this knowledge the user could adjust the communication plan for each client.

Here is an example of Upfront psychographic object:

Upfront Psychographics
Sam Altman

Related Details

Upfront Psychographics Name
Sam Altman

Survey Results
{\"segment\": \"Priority Juggler\", \"segmentCode\": \"PJ\", \"accuracyLevel\": 0.91}

Owner
Aquiva Admin

Client Account
Sam Altman

Client Contact
Sam Altman

Survey Result

Survey Result Date
15.08.2024

Survey Segment
Priority Juggler

Survey Segment Code
PJ

Survey Accuracy Level
0.91

Intelligent Default

Intelligent Default Segment
Self-Achiever

Intelligent Default Date
15.08.2024

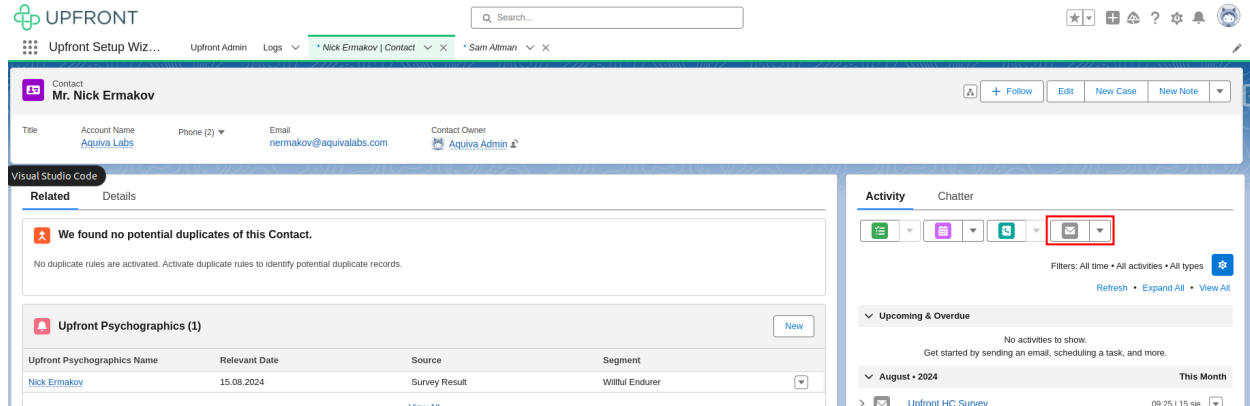
Balance Seeker Percentage
0.13235349538345580

Direction Taker Percentage
0.10461654418692293

Priority Juggler Percentage

Intelligent default segmentation is defined automatically basic on batch job runs.

On the other hand, to get the survey result you need to get answers from a client. In order to do that you can send survey using standard functionality:



Here is an example of how to select predefined email template with link to the survey:

