



Questionnaire

Accelerator Setup Guide

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Questionnaire

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General Installation and Setup Notes

Greetings! Thank you for using free, managed apps and components from IBM Consulting, available via AppExchange. To ensure a smooth installation and setup experience, please review the following guidelines before proceeding.

Note on Support:

IBM Consulting does not provide any official support on our free applications that are available via AppExchange. However, we are absolutely interested in your feedback, whether regarding opportunities for improvement or just general input.

Full-featured Accelerators & Premium Support:

IBM Consulting does sell many additional accelerators that are not listed on AppExchange. Please [contact us directly](#) to learn more.

Setup Guide Version

Application features and functionality may change over time. The contents of this setup guide are applicable to the most current version of the application as of the time the guide is published.

Salesforce Product Compatibility

This application can be used in both the Lightning Experience (LEX) and Experience Cloud (community).
LWR Sites are currently not supported at this time.

Installation

Prerequisites

Some products require certain configuration to be completed prior to executing an install. If you install prior to completing these steps, you may encounter errors that prevent installation.

You may need to update the following general settings:

- Enable Communities
- Enable Chatter

Official Documentation

Please review the official [Salesforce notes on package installation](#).

Access

Application Access

Salesforce enforced significant modifications to the sharing of @AuraEnabled Apex classes in the Winter '21 release:

- [Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile \(Update, Enforced\)](#)
- [Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile \(Update, Enforced\)](#)

These changes mean that you may need to grant explicit access to certain Apex classes for corresponding profiles. To do that, you will need to grant access via profiles or permission sets. For profiles, you will enable Apex classes at the profile level. For permission sets, you will create a permission set with the relevant access and then add that permission set to relevant users and/or permission set groups. NOTE: Guest users are [handled via the guest user profile](#) at the community level.

Object and Field Access

Many IBM Consulting applications include custom objects. Please ensure that object and field level security is set for any users (including guest users) who will be using the application.

Overview

The IBM Consulting Questionnaire for Salesforce app is a Flow Template. It is delivered as a templated Lightning Flow for Lightning Communities, Lightning Experience, and the Salesforce mobile app that includes a few custom Lightning components embedded within the Flow screens.

The app facilitates the easy creation, presentation, and completion of questionnaires and captures the responses for future use. The app is intended for both direct self-service (by users in LEX or communities) and for agent-facilitated discussions.

The screenshot displays the app's user interface. At the top is a dark navigation bar with a logo on the left and links for 'Home' and 'Support' on the right, along with search, notification, and user icons. Below this is a row of four service tiles: 'Checking' (with a stack of coins), 'Savings' (with a piggy bank), 'Loans' (with a person at a desk), and 'Other Services' (with a person at a laptop). The 'Loans' tile is highlighted with a white border. Below the tiles is a 'Questionnaire' section featuring a 'Loan Questionnaire' card. This card has a mountain background image, the title 'Loan Questionnaire', and a sub-header 'Loan Questionnaire'. It contains the text 'Fill out this quick questionnaire to help us determine whether you qualify for a loan with us.' and a question 'What is the purpose of your mortgage?' with a dropdown menu showing 'Purchase', 'Refinance', 'Home Equity', and 'Other'. A 'Powered by 7summits' logo is at the bottom right of the card. A large black arrow points upwards from below the card. To the right of the questionnaire is a 'Quick Links' section with two links: 'My Account' and 'Lost My Credit Card', each preceded by a blue arrow icon. A vertical image of a person holding a key is positioned between the questionnaire and the quick links.

Questionnaire

Loan Questionnaire

Loan Questionnaire

Fill out this quick questionnaire to help us determine whether you qualify for a loan with us.

? What is the purpose of your mortgage?

Purchase Refinance Home Equity Other

Powered by 7summits

Quick Links

[My Account](#)

[Lost My Credit Card](#)

Prerequisites

Prerequisites for the flow are minimal. You must ensure that any user using the Flow has the proper permission to view it:

User Edit
Chatter Expert [Help for this Page](#)

User Edit Save Save & New Cancel

General Information ! = Required Information

First Name		User License	Chatter Free
Last Name	Chatter Expert	Profile	Chatter Free User
Alias	Chatter	Active	☒
Email	noreply@chatter.salesfc	Marketing User	☐
Username	chatty.00d2e0000012m	Offline User	☐
Nickname	Chatter Expert	Sales Anywhere User	☐
Title		Knowledge User	☐
Company	7Summits PW UAT	Flow User	☐



Custom Objects

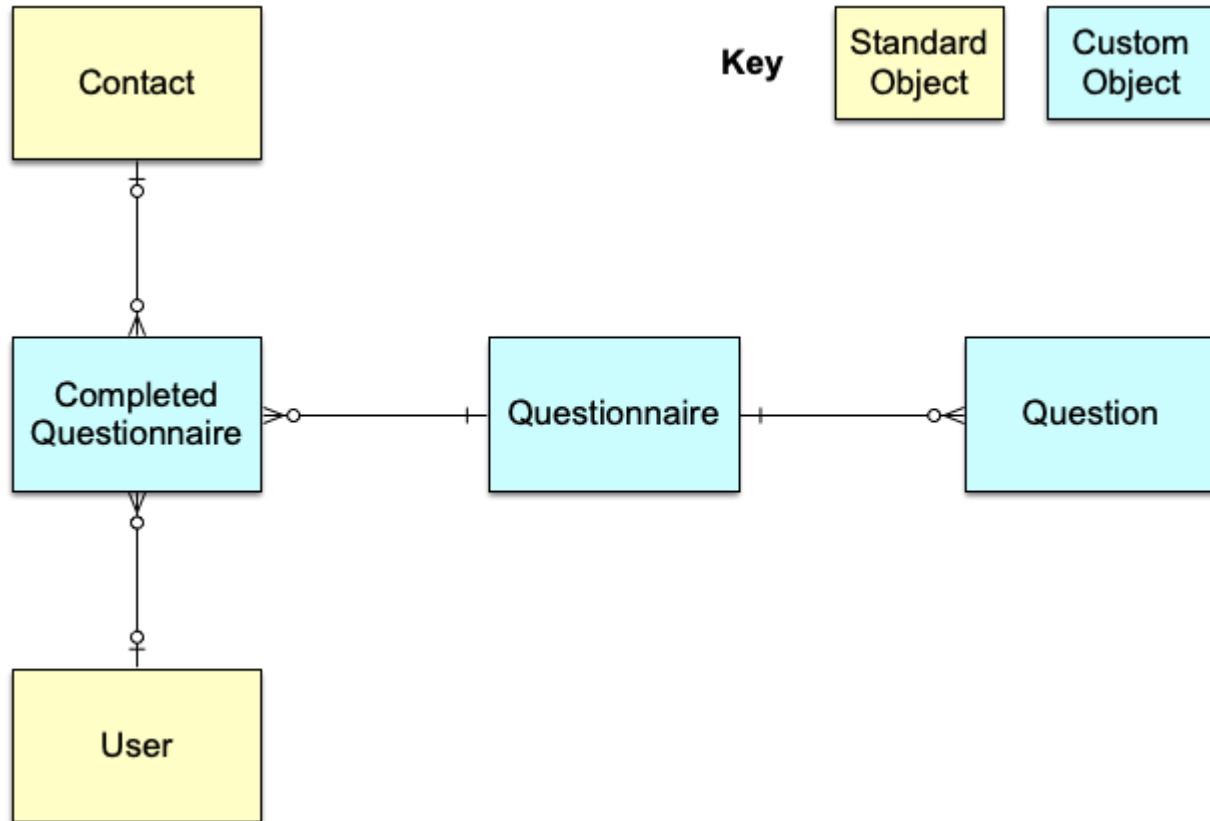
The Questionnaire Form app is primarily driven by the data in the following objects:

- Questionnaires
- Questions
- Completed Questionnaires

To pass data to the Flow, you must first create a questionnaire in the Questionnaire object, and then create questions for it in the related Questions object.

Once a questionnaire is completed, it is then stored in the Completed Questionnaires object for the user/contact.

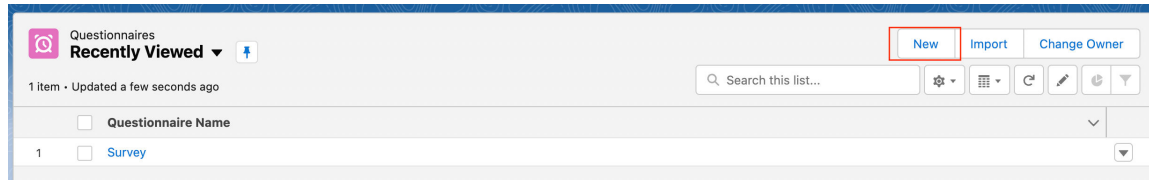
The overall data model is as shown below:



Questionnaires

The Questionnaires object sets the primary configurable details of the overall questionnaire experience.

To create a new questionnaire, navigate to the Questionnaires object and select **New**



Enter the details for your new questionnaire:

The screenshot shows the 'New Questionnaire' form. It has a title bar 'New Questionnaire'. Below it is a section titled 'Information'. The form contains the following fields:

- Questionnaire Name**: A required text field (indicated by a red asterisk).
- Description**: A text field with an information icon.
- Active**: A checkbox with an information icon.
- Type**: A dropdown menu with 'Standard' selected and an information icon.
- Owner**: A field showing 'Emma OBrien' with a user icon.
- Header Image**: A text field with an information icon.
- Success Text**: A text field with an information icon.

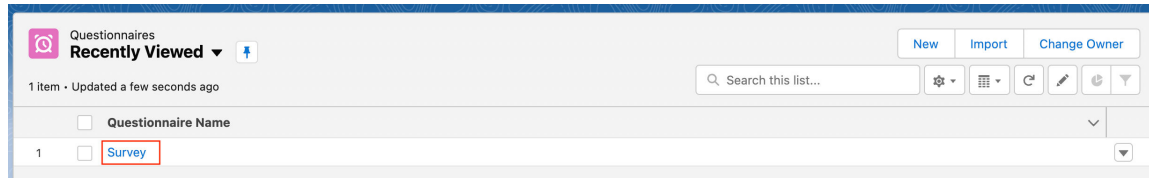
 At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

Field	Description
Questionnaire Name	The name of the questionnaire to be displayed to the user
Description	A user-facing description of the questionnaire
Header Image	Enter the name of an image stored as a static resource to be used as the header in the flow. You can use a URL or a SLDS image. Note: this field is required
Active	Questionnaires must be active to be available for users
Success Text	The text to be displayed upon completion of the questionnaire
Type	The type of questionnaire (may be used for categorizing/sorting)

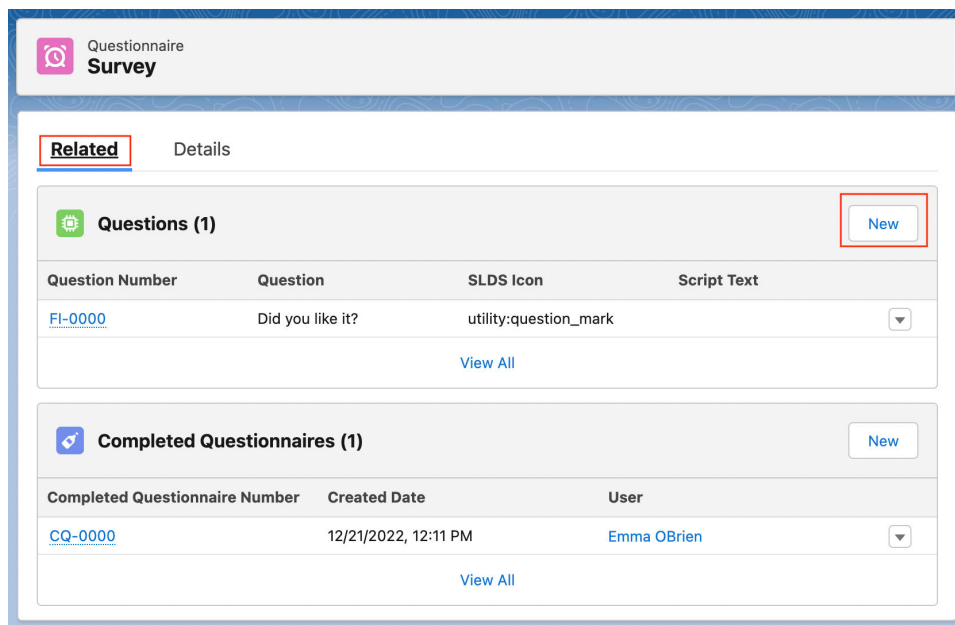
Question Object

The Question object sets the primary configurable details of each question.

To create questions, first select the questionnaire in the Questionnaires object that you would like to create questions for:



Next, select **Related** to display the related objects. Select **New** next to the Questionnaires Question object.



Fill out the necessary information for your new question:

Questionnaire

New Question

Information

Question Number

SLDS Icon ⓘ

utility:question_mark

Questionnaire ⓘ

Survey ×

Script Text ⓘ

Header Image ⓘ

* Question ⓘ

* Answer 1 ⓘ

* Answer 2 ⓘ

Answer 3 ⓘ

Answer 4 ⓘ

Cancel

Save & New

Save

Field	Description
SLDS Icon	A different icon can be used for each question. Enter the SLDS icon here
Script Text	This is guidance text for an agent. It can be shown or hidden using the Show Guidance Text builder property when configuring the component in Builder
Header Image	Enter a URL or SLDS for the question's header image
Question	The text of the question itself. Make sure to format this as an actual question
Answers 1-4	Enter 2-4 responses for each question to be displayed as multiple choice answers to the user

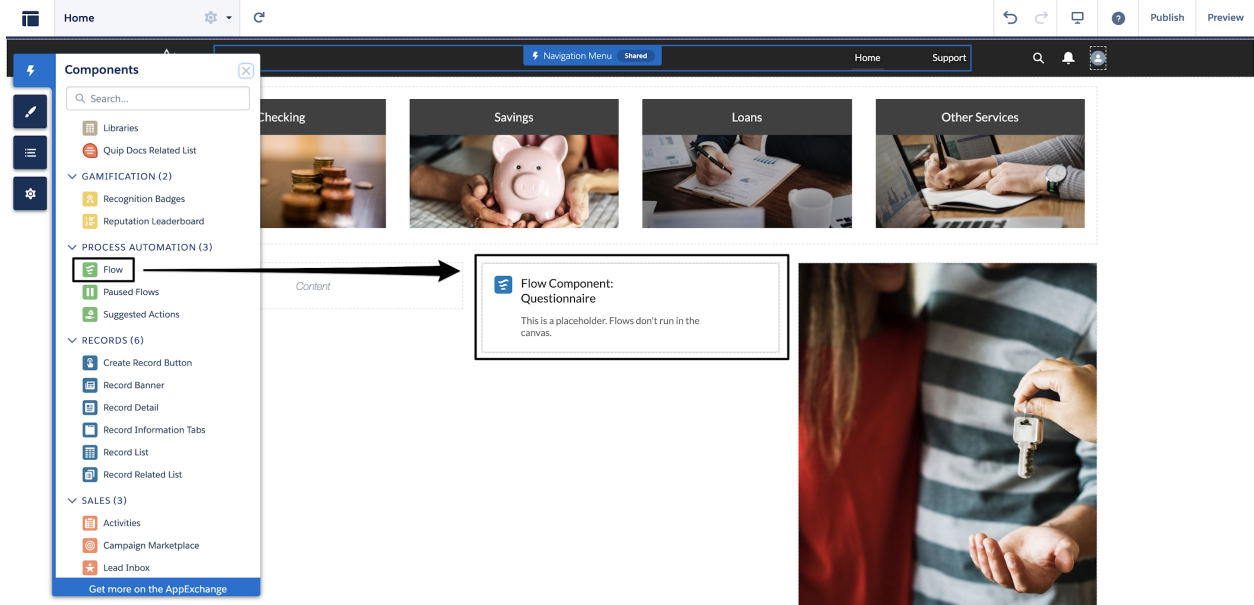
Page Setup

This component can be used on any Lightning Community or Lightning Experience page.

Lightning Community

To Place the Component in a Lightning Community:

Drag the **Flow** component onto the page using Community Builder and select “Questionnaire” for the flow.



Lightning Experience

To Place the Component in Lightning Experience:

Drag the **Flow** component onto the page using Lightning App Builder and select “Questionnaire” for the flow.

The screenshot displays the Lightning App Builder interface. On the left, the 'Lightning Components' panel is open, showing a search bar and a list of components under the 'Standard (23)' category. The 'Flow' component is highlighted with a red box. A red arrow points from this box to the 'Flow Component' placeholder in the main canvas. The main canvas shows a 'Quarterly Performance' chart and 'Recent Records' and 'Today's Events' sections. On the right, the 'Page > Flow' configuration panel is open, showing the 'Flow' dropdown set to 'Questionnaire' and the 'Layout' dropdown set to 'One Column'. Below these, there are input fields for 'Active_Questionnaire' and 'ContactId', and checkboxes for 'Include_Subflow', 'Show_Guidance_Text', and 'Use_on_Contact_Page'. At the bottom, the 'Set Component Visibility' section is visible, including a 'Filters' section with an 'Add Filter' button.

Component Configuration

Once the Flow component is placed on a page, use the property builder to configure for Questionnaire:

Flow

Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.

*Flow

Questionnaire

Edit Flow in Flow Builder

Optionally, enter values for these flow variables. Only variables that allow input access are supported.

Active_Questionnaire

list

ContactId

☐ Include_Subflow

List_Type

☐ Show_Guidance_Text

☐ Use_on_Contact_Page

Property	Description
Flow	Select "Questionnaire"
Active_Questionnaire	The Record Id of the questionnaire to be displayed. Enter "list" for a list of all questionnaires to be shown
ContactId	If used on a contact page (for interaction between an agent/employee and a contact), the Record ID from the Contact can be used. If left blank, the flow will default to the running user
Include_Subflow	When checked, the Questionnaire Subflow is run, which simply sends a confirmation email. That flow can be modified as desired for your use case
List_Type	If you have entered "list" in the Active_Questionnaire field above, you can filter the list of Questionnaires to a specific Type of questionnaire by entering a value in this field. The value entered needs to match to one of the picklist values defined on the Type__c field of the 7S Questionnaire object.

Questionnaire

Property	Description
Show_Guidance_Text	When checked, shows guidance text (Script Text from Question record) to an agent
Use_on_Contact_Page	Check if to be used on a contact page. Else, it is assumed that this is being used for the running user.



NOTE

To preview the Questionnaire, you must access the site normally (not in Experience Builder mode)