GrowPromoter package installation guide

Getting started

Before we start you will need a link to the package (provided by ABSI) and a Developer Edition Salesforce org (DEorg). To create a free DEorg please go to this link:

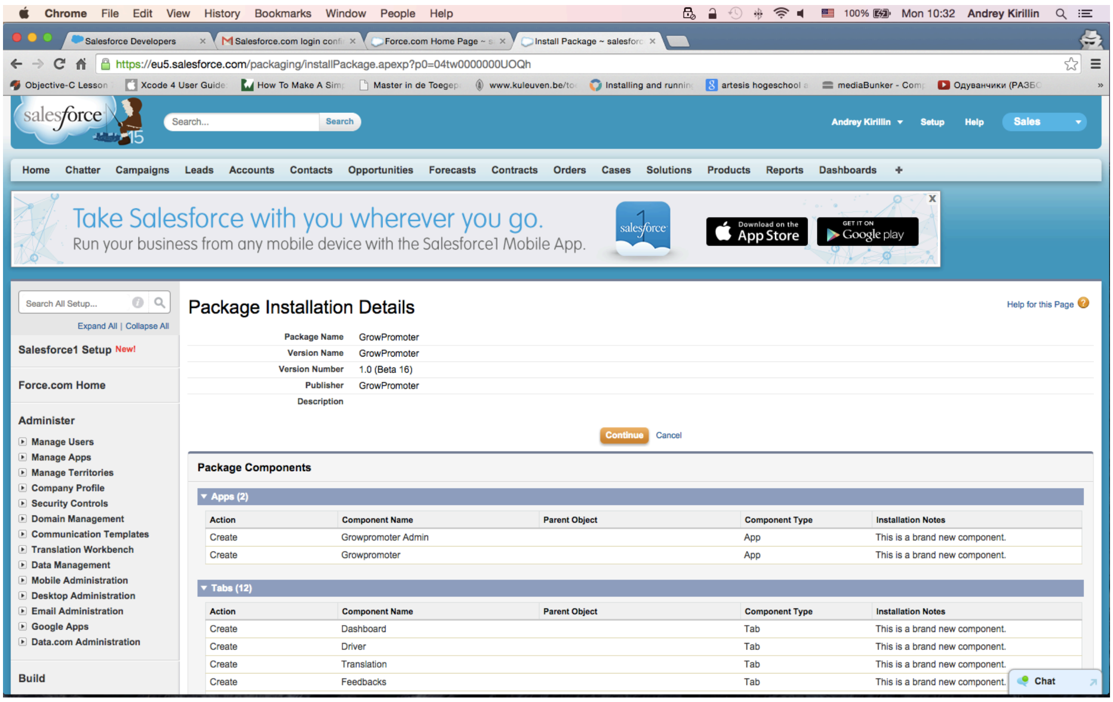
https://developer.salesforce.com/signup

Please note that Username must be in an email form, but it must not be an actual email (something like testing.gp.package@test.com should work).

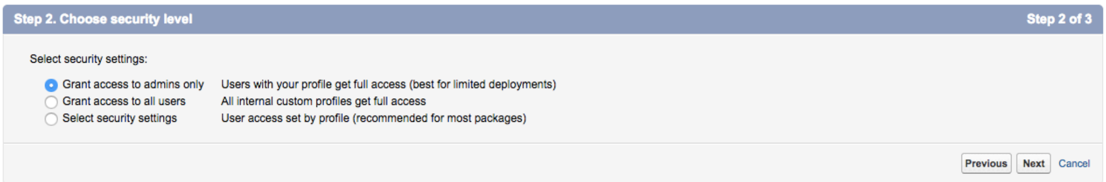
After creating a DEorg you will get an activation mail, click on the link there.

Then you will be asked to create a password for your newly created user.

After you successfully log in into your DEorg, you may follow the package install link. You will see a similar screen:



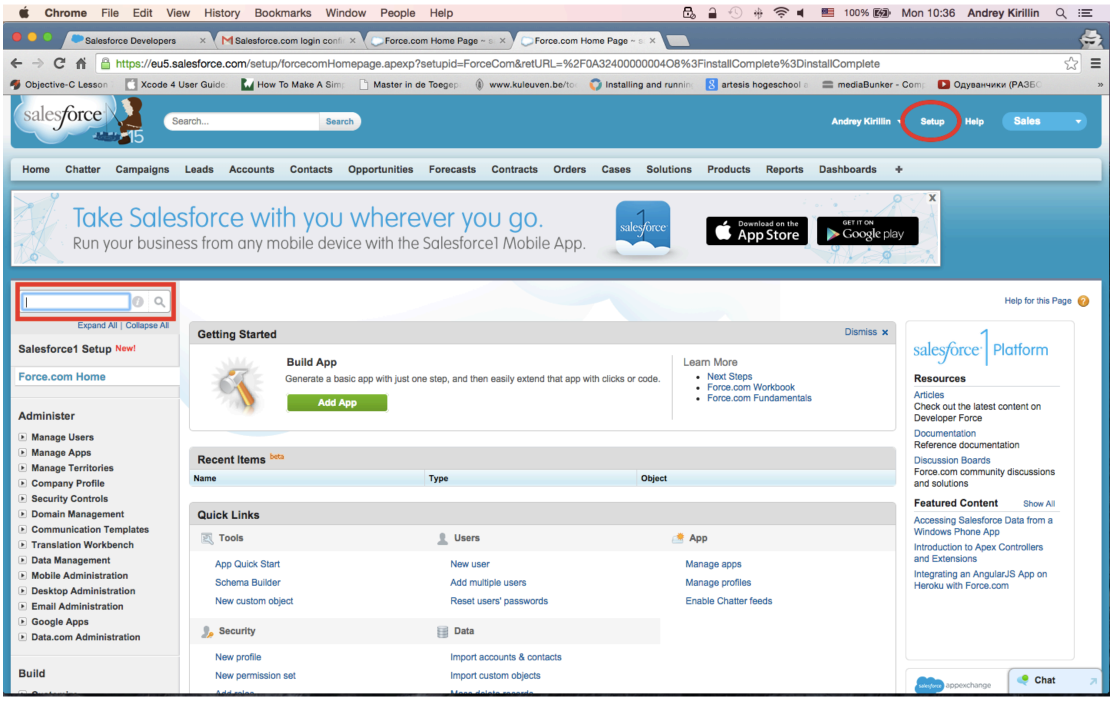
Click Continue. On next page scroll down and click Next in the bottom right. This will lead you to the following screen:



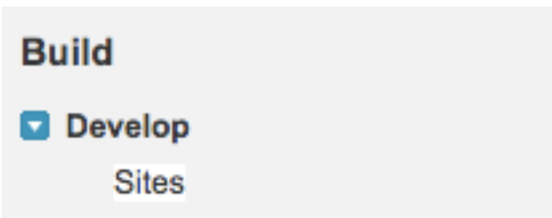
Choose “Grant access to all users” and click Next. On the last step click Install. We are almost there, but now the advanced part begins.

Setting up the site

In the top right corner, next to your name, click Setup (red oval in the screenshot). Then, in the searchbox (red rectangle in the screenshot), type “sites”.

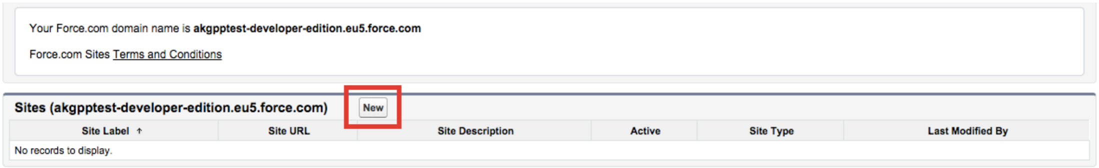


You will get the following search result:

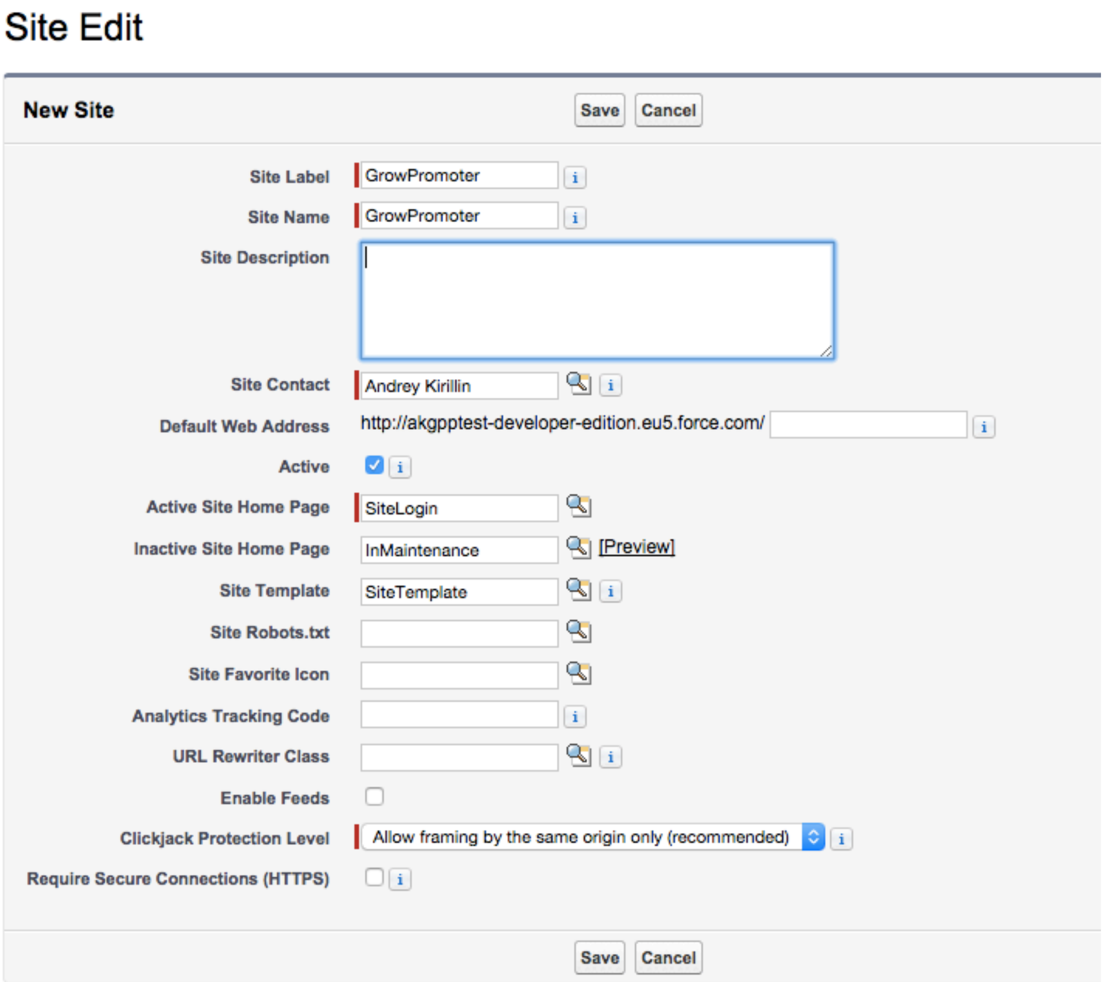


Click on Sites. Because this is a new DEorg, you will not have any active sites, so now it’s time to create one. Type anything in the textbox provided and click “Check Availability”. If this domain is available, check the checkbox (don’t forget to read Sites Terms of Use) and click “Register My Force.com Domain”. In the pop-up click OK.

After you registered your domain, it's time to create a site. Click on New

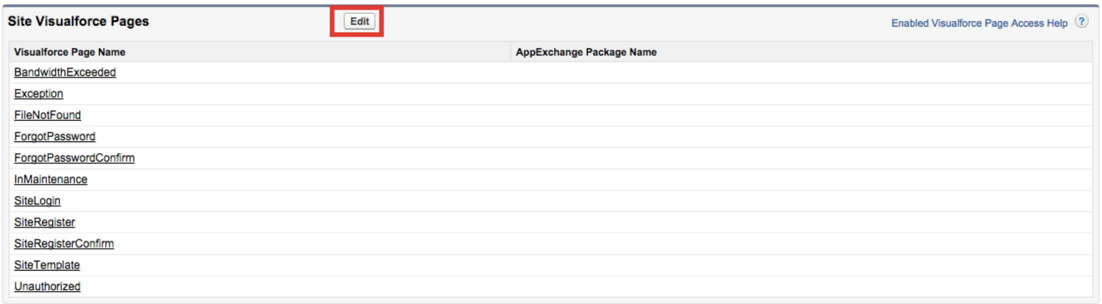


Provide all needed details for your site. Type anything for Site Label, tab out and Site Name will fill in automatically. Check Active checkbox and choose SiteLogin for Active Site Home Page (actually Active Site Home Page can be anything). You should now have something similar to this:



Click Save.

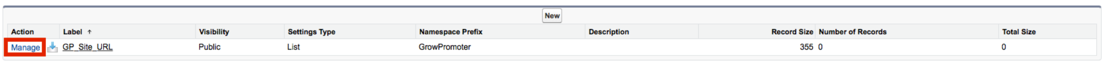
Scroll down to Site Visualforce Pages and click Edit



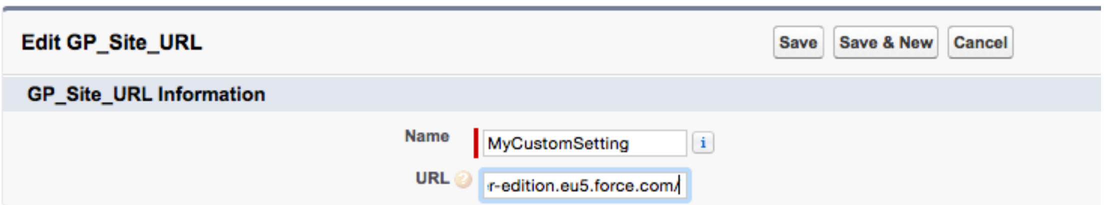
In Available Visualforce Pages scroll down to find GrowPromoter.Survey, select it and click Add. Then click Save.

Configuring site URL

Now copy your domain name (http://akgpptest-developer-edition.eu5.force.com/ in my case) and search setup for "Custom Settings". Next to "GP_Site_URL" click "Manage"



This will lead you to "GP_Site_URL" custom setting. Click "New". Give a name to your custom setting (can be anything) and URL that we copied earlier. Your screen should now look somewhat similar to this:

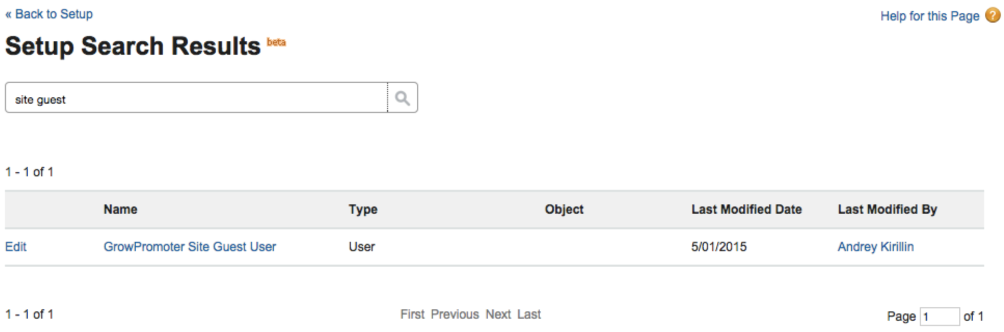


Click "Save".

NOTE: Do not add any other record to this custom setting!

Setting privileges for public users

We are almost there. Now we only need to edit privileges of the public user. Go to Setup (if you are not there anymore) and in the searchbox type "site guest". Hit Enter. Search results will look somewhat similar to this:

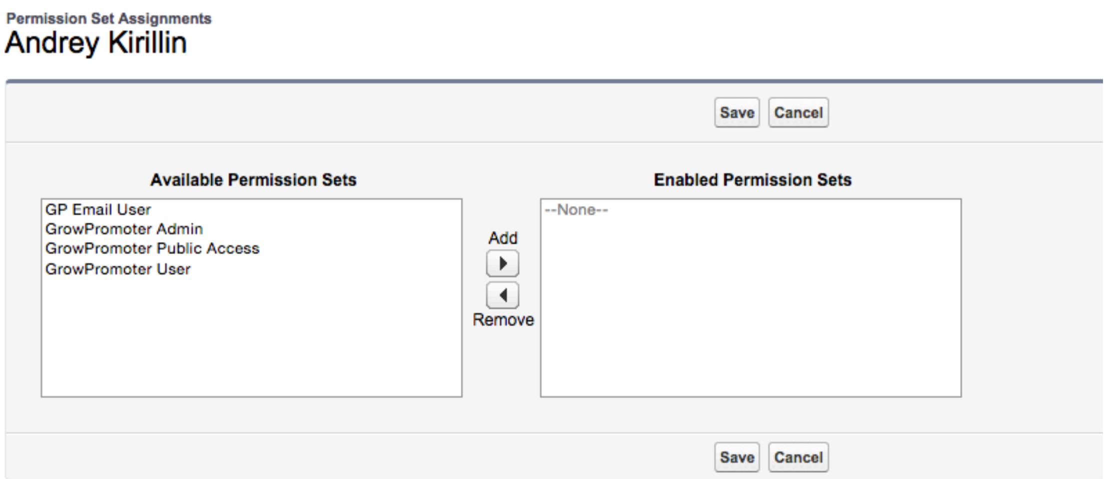


Click on this user (GrowPromoter Site Guest User in my case). Click on “Edit Assignments” under “Permission Set Assignments” block:

From “Available Permission Sets” select “GrowPromoter Public Access” and click “Add”. Then click Save.

Setting privileges for Salesforce users

Now we should also set privileges to Salesforce users. To do so, expand “Manage Users” and click “Users” in the setup menu. Then choose the user and click on him/her. In the User detail page scroll down to “Permission Set Assignments” and click “Edit Assignments”. Assign a permission set for this user according to his rights(Admin/User) and click “Save”.



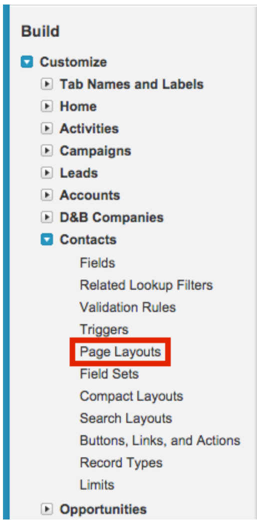
Setting up Heroku mail sending

In Setup in searchbox search for “Installed Packages”. Next to GrowPromoter click “Configure”.

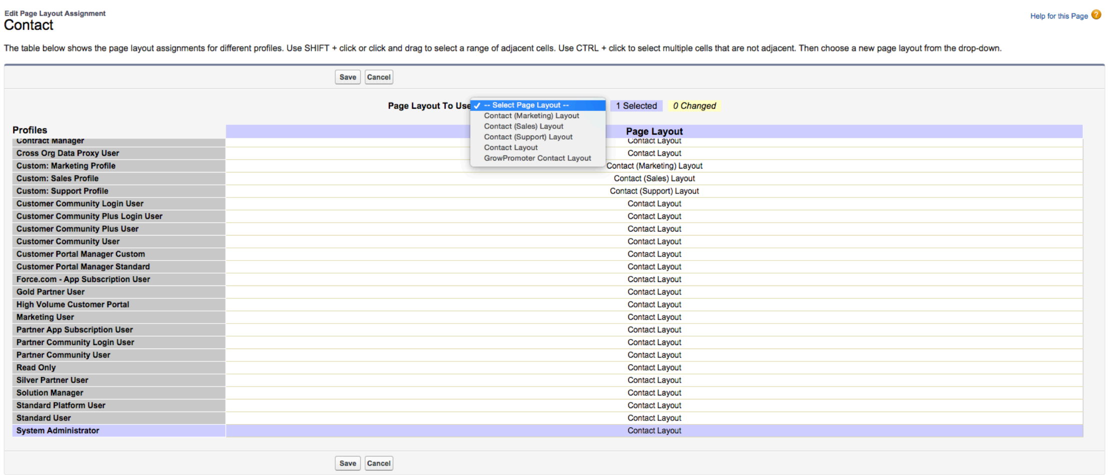
Allow permissions if necessary.

Editing page layouts

Now we also need to edit page layouts. While still in setup, look at the left-hand side menu, find “Build”, expand “Customize” section and then expand “Contacts” section. Then click on “Page Layouts”



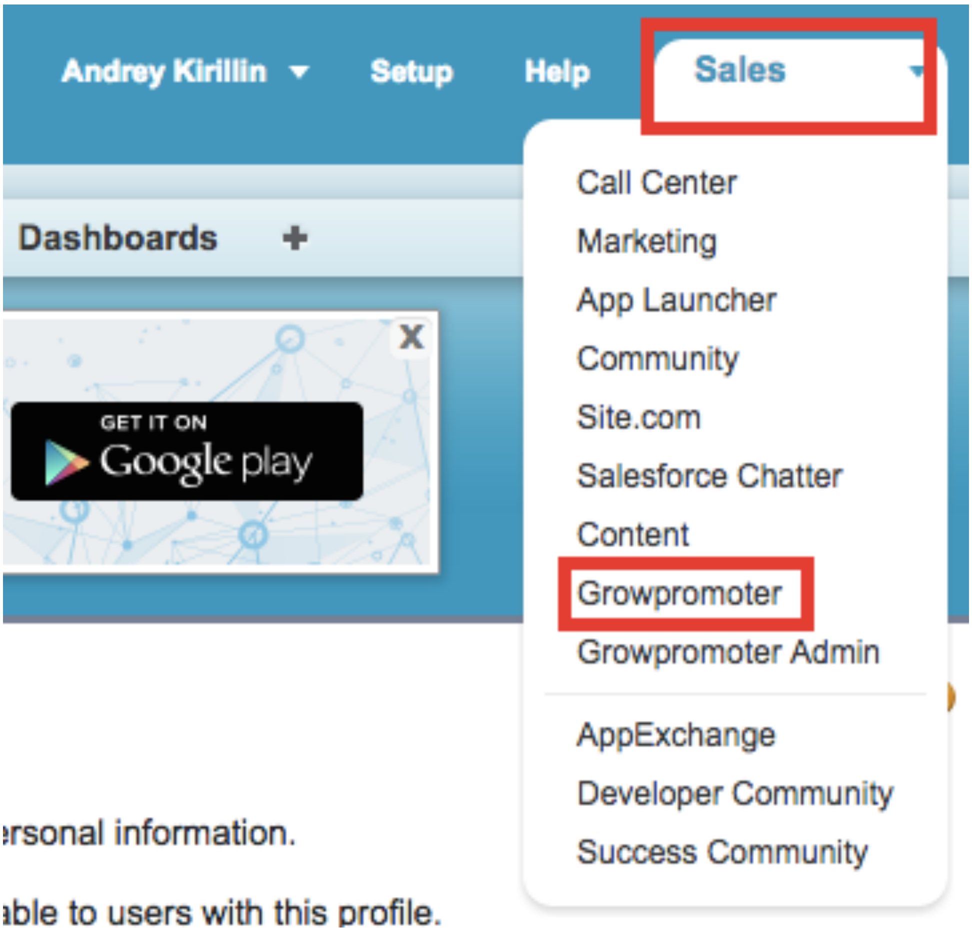
Now click on “Page Layout Assignment” and then on “Edit Assignment”. Change layouts for profiles of your choice(for this tutorial I will only edit System Administrator profile). Click on desired profile, then choose a desired page layout from the top of the page(in this case it is “GrowPromoter Contact Layout”):



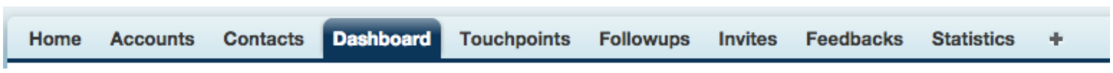
Now you may repeat same steps for Account page layout.

Using the application

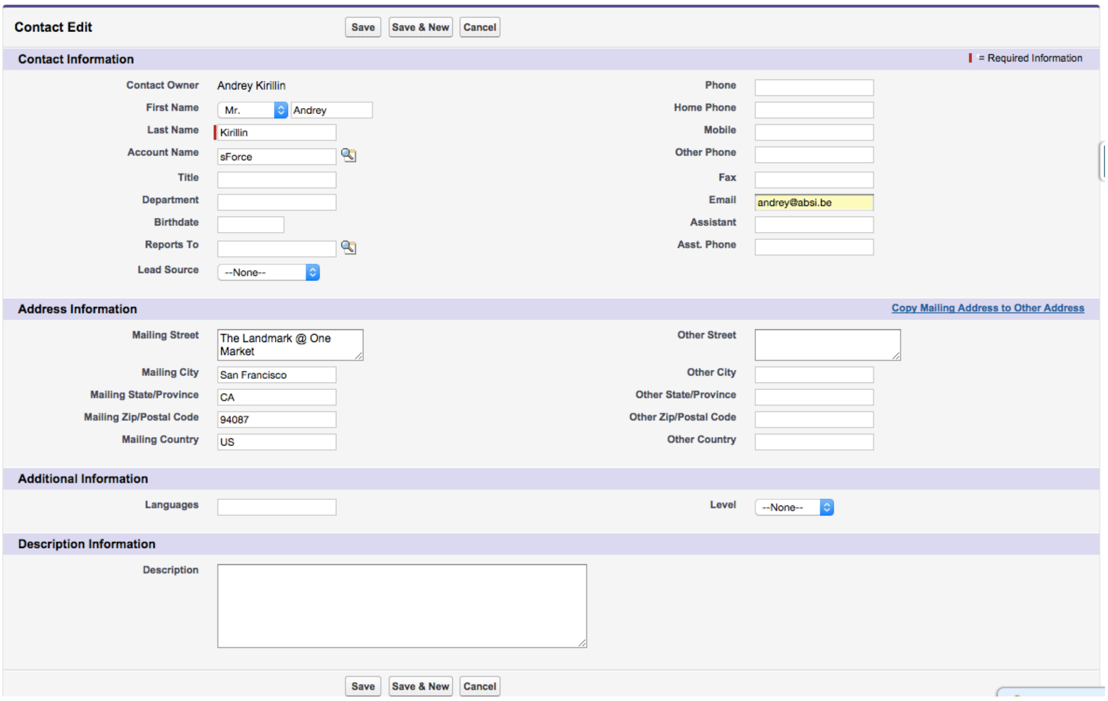
In the top right corner switch app to GrowPromoter:



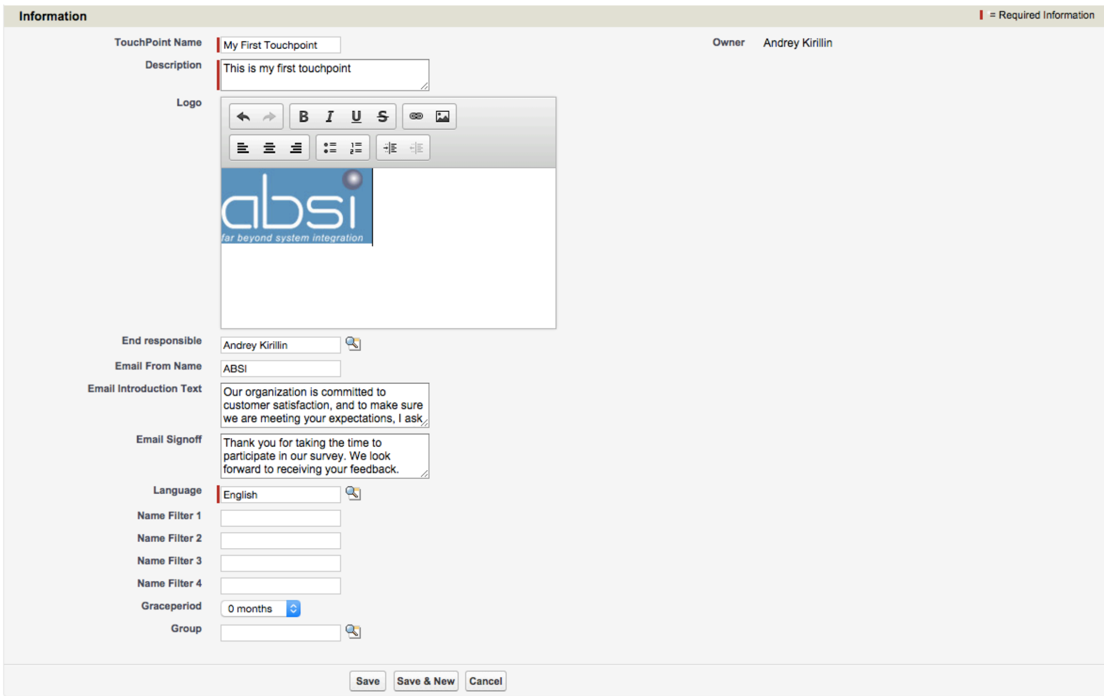
In the tabs click Contacts and create a new contact.



Do not forget to add any Account Name to it (otherwise it will not be possible to use this contact later). I used standard account sForce (you may first create another Account if you want to). Also, do not forget to fill in Email field on contact creation. Here is what I have for my new contact:



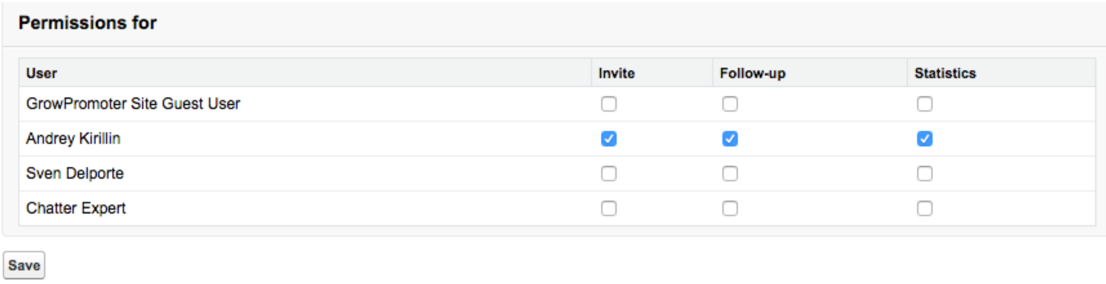
Click Save. Then choose Touchpoints tab and click New to create a new Touchpoint. You will first see a screen with language selection for the touchpoint(Record Type). Choose a language and click “Continue”. Fill in Touchpoint Name, Description, Logo and End Responsible



Click Save. After this we need to configure the questionnaire. Click Questionnaire button.

Select a scenario that you want and configure the questionnaire as desired. As the very last question (after you see “This was the last question, please save your feedback by pressing the "Finish" button") you will get an option to enable social media sharing. Choose any social media that you want, select score needed in order for social media to appear and click Finish.

Now click on "User Permissions" button. This will open a popup window with all users and possible permissions. Set them as desired. For this guide I will give myself all rights:

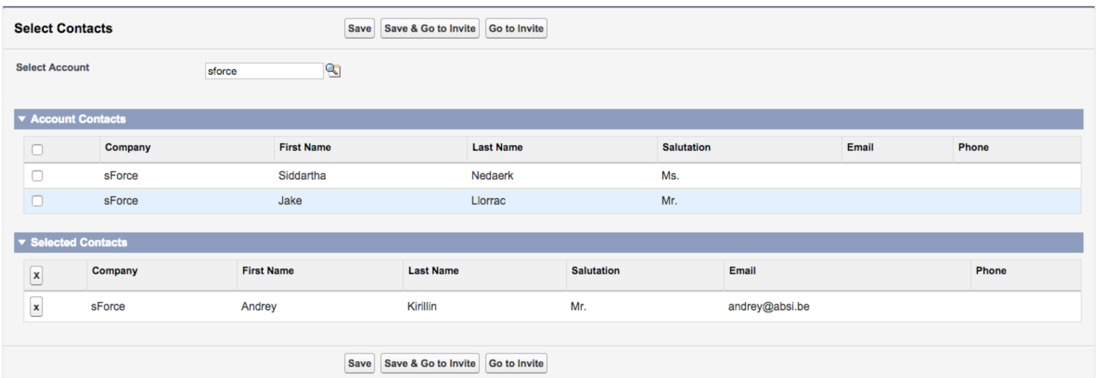


Then click "Save".

Now we only need to create an invite and send the mails. There are 2 ways to do it.

Creating invites and feedbacks via Invites tab

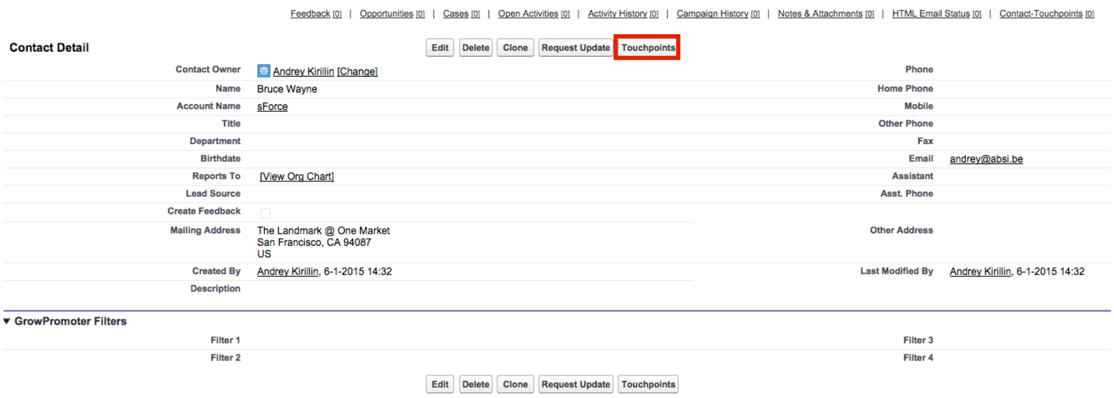
Click Invites tab and then click New. Select a touchpoint and click Save. Then you will get an option to select existing contacts or upload a csv. Click Select Contacts. In the textbox type the name of the account you chose for your contact and tab out. You will get a list of all contacts associated with this account. Select the one you created.



Click Save & Go to Invite.

Creating invites and feedbacks via Contact layout

Now that we have a touchpoint and a contact, we can create feedback straight from Contact layout. To do this, go to a contact and click on "Touchpoints" button:



This will open a popup window with a list of all existing touchpoints. Select the ones you want and click “Save”. Now edit this contact and set “Create Feedback” checkbox to true(checked) and click “Save”. Now you successfully created an invite with a feedback in it!

Sending emails

Now there are 2 options:

1. Wait till mails will be sent automatically
2. Force force.com to send mails now.

For second option click on “Send Now” button in the Invite.

Now wait until mail hits your mailbox.

When you get the mail you can complete the survey.

Pitfalls

Please do not forget, that Developer Edition orgs have a daily limit of only 15 email per day. After that limit has been reached, the application will start sending mails from Heroku(that’s why we had to click “Configure” in Installed Packages.

In production orgs this limit is much-much higher, 1000 emails per day per user, so we can send a lot more mails from Salesforce itself. However, we have implemented a cap after which all emails will be sent through Heroku. Once there are only 200 emails left for the entire org, our application will switch to Heroku.

Also, please do not forget, that it may take some time before emails will be delivered. So do not expect all mails to hit your mailbox instantly.