

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:

The screenshot shows the Salesforce Package Installation Details page for the 'GrowPromoter' package. The page is displayed in a web browser window with the Salesforce logo and navigation menu at the top. The main content area is titled 'Package Installation Details' and includes a search bar, a 'Salesforce1 Setup' button, and a 'Force.com Home' link. The package details are listed as follows:

Field	Value
Package Name	GrowPromoter
Version Name	GrowPromoter
Version Number	1.0 (Beta 16)
Publisher	GrowPromoter
Description	

Below the package details, there are two sections: 'Package Components' and 'Package Components'. The 'Package Components' section is expanded, showing a table of components. The table has five columns: Action, Component Name, Parent Object, Component Type, and Installation Notes. The components are listed as follows:

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Growpromoter Admin		App	This is a brand new component.
Create	Growpromoter		App	This is a brand new component.
Create	Dashboard		Tab	This is a brand new component.
Create	Driver		Tab	This is a brand new component.
Create	Translation		Tab	This is a brand new component.
Create	Feedbacks		Tab	This is a brand new component.

The page also includes a 'Continue' button and a 'Cancel' button. A 'Chat' button is visible in the bottom right corner.

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

Step 2. Choose security level Step 2 of 3

Select security settings:

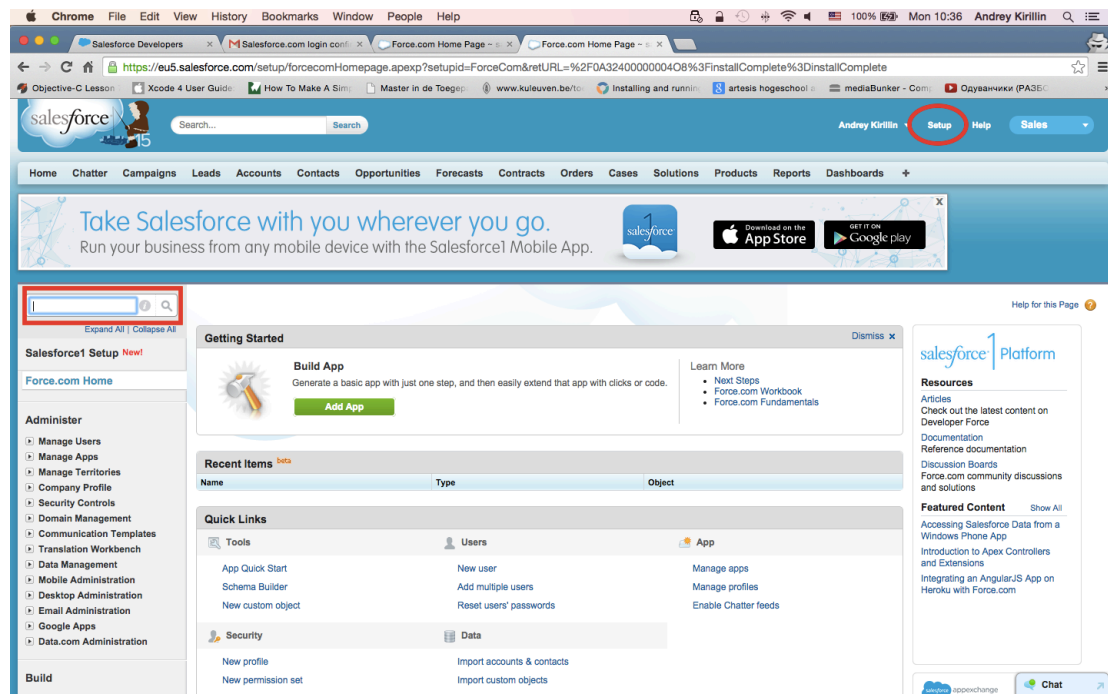
- ☒ Grant access to admins only Users with your profile get full access (best for limited deployments)
- ☐ Grant access to all users All internal custom profiles get full access
- ☐ Select security settings User access set by profile (recommended for most packages)

Previous Next Cancel

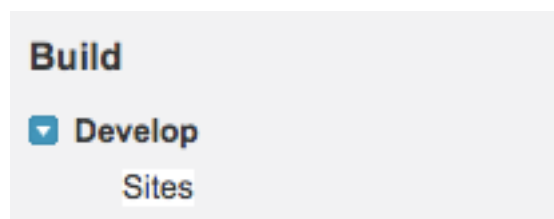
Choose “Grant access to all users” and click Next. On the last step click Install. We are almost there, but now the advanced part begins.

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”.

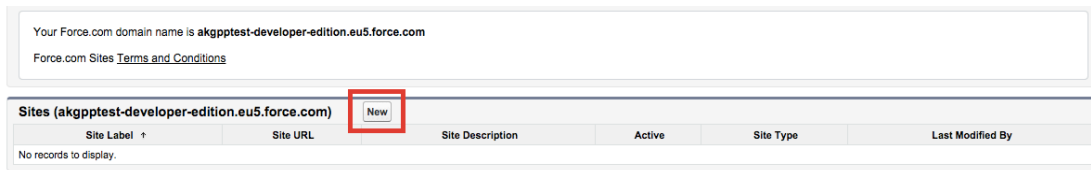


You will get the following search result:



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.

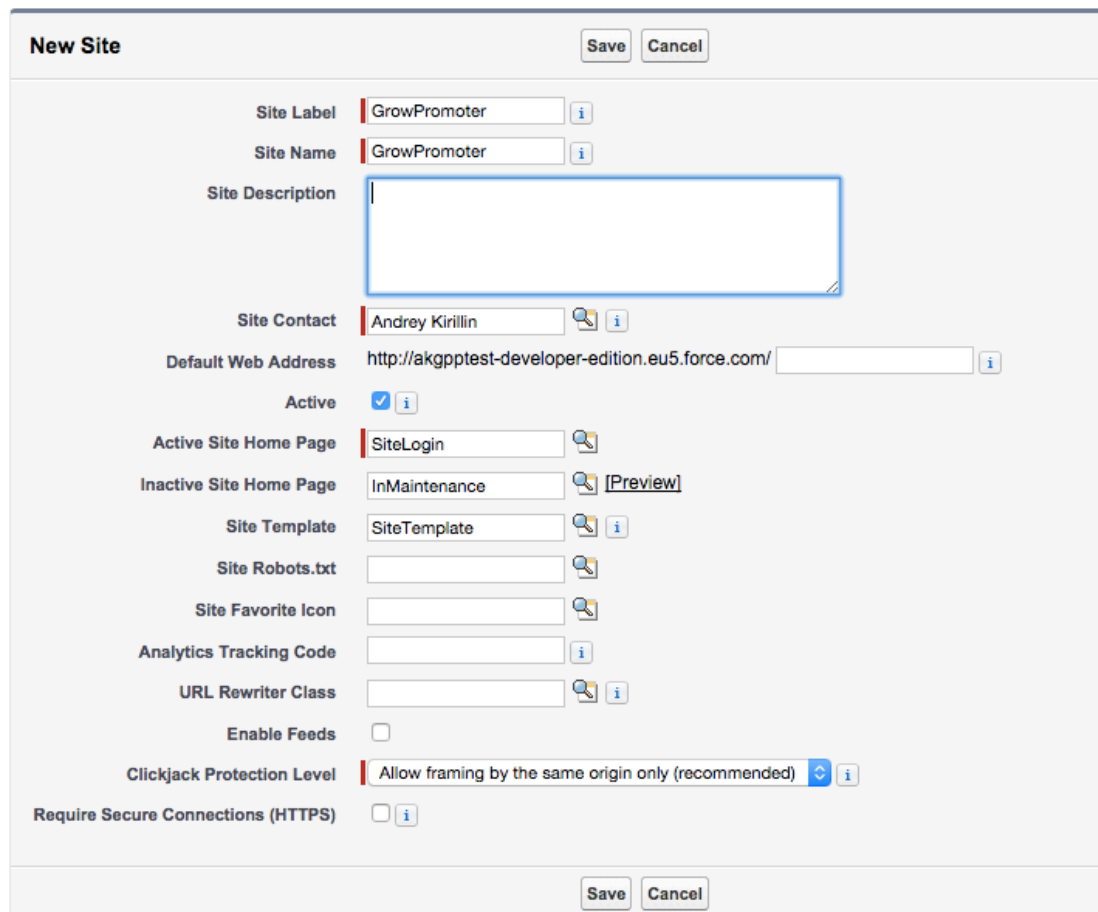
After you registered your domain, it's time to create a site. Click on New



The screenshot shows the top of the Force.com Sites interface. At the top, it says "Your Force.com domain name is **akgpptest-developer-edition.eu5.force.com**" with a link to "Force.com Sites Terms and Conditions". Below this is a table header for "Sites (akgpptest-developer-edition.eu5.force.com)". The table has columns: Site Label, Site URL, Site Description, Active, Site Type, and Last Modified By. A "New" button is highlighted with a red box. Below the table header, it says "No records to display."

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:

Site Edit



The screenshot shows the "New Site" form. At the top, there are "Save" and "Cancel" buttons. The form fields are as follows:

- Site Label: (with an info icon)
- Site Name: (with an info icon)
- Site Description:
- Site Contact: (with a search icon and an info icon)
- Default Web Address: (with an info icon)
- Active: ☒ (with an info icon)
- Active Site Home Page: (with a search icon)
- Inactive Site Home Page: (with a search icon and a "[Preview]" link)
- Site Template: (with a search icon and an info icon)
- Site Robots.txt: (with a search icon)
- Site Favorite Icon: (with a search icon)
- Analytics Tracking Code: (with an info icon)
- URL Rewriter Class: (with a search icon and an info icon)
- Enable Feeds: ☐
- Clickjack Protection Level: (with a dropdown arrow and an info icon)
- Require Secure Connections (HTTPS): ☐ (with an info icon)

At the bottom, there are "Save" and "Cancel" buttons.

Click Save.

Scroll down to Site Visualforce Pages and click Edit

Visualforce Page Name	AppExchange Package Name
BandwidthExceeded	
Exception	
FileNotFound	
ForgotPassword	
ForgotPasswordConfirm	
InMaintenance	
SiteLogin	
SiteRegister	
SiteRegisterConfirm	
SiteTemplate	
Unauthorized	

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”

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	GP_Site_URL	Public	List	GrowPromoter		355	0	0

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:

Edit GP_Site_URL Save Save & New Cancel

GP_Site_URL Information

Name: i

URL:

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:

Setup Search Results beta

1 - 1 of 1

	Name	Type	Object	Last Modified Date	Last Modified By
Edit	GrowPromoter Site Guest User	User		5/01/2015	Andrey Kirillin

1 - 1 of 1

[First](#) [Previous](#) [Next](#) [Last](#)Page of 1

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

Permission Set Assignments [Edit Assignments](#)

No records to display

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”.

Permission Set Assignments

Andrey Kirillin

Save Cancel

Available Permission Sets

GP Email User
GrowPromoter Admin
GrowPromoter Public Access
GrowPromoter User

Add

Remove

Enabled Permission Sets

--None--

Save Cancel

Setting up Heroku mail sending

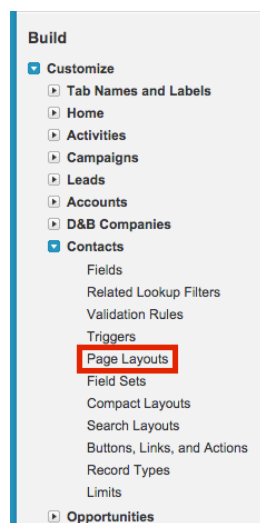
In Setup in searchbox search for “Installed Packages”. Next to GrowPromoter click “Configure”.

Installed Packages					
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date
Uninstall Configure	GrowPromoter	GrowPromoter	1.0 (Beta 16)	GrowPromoter	5/01/2015 10:34

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”):

Edit Page Layout Assignment
Contact

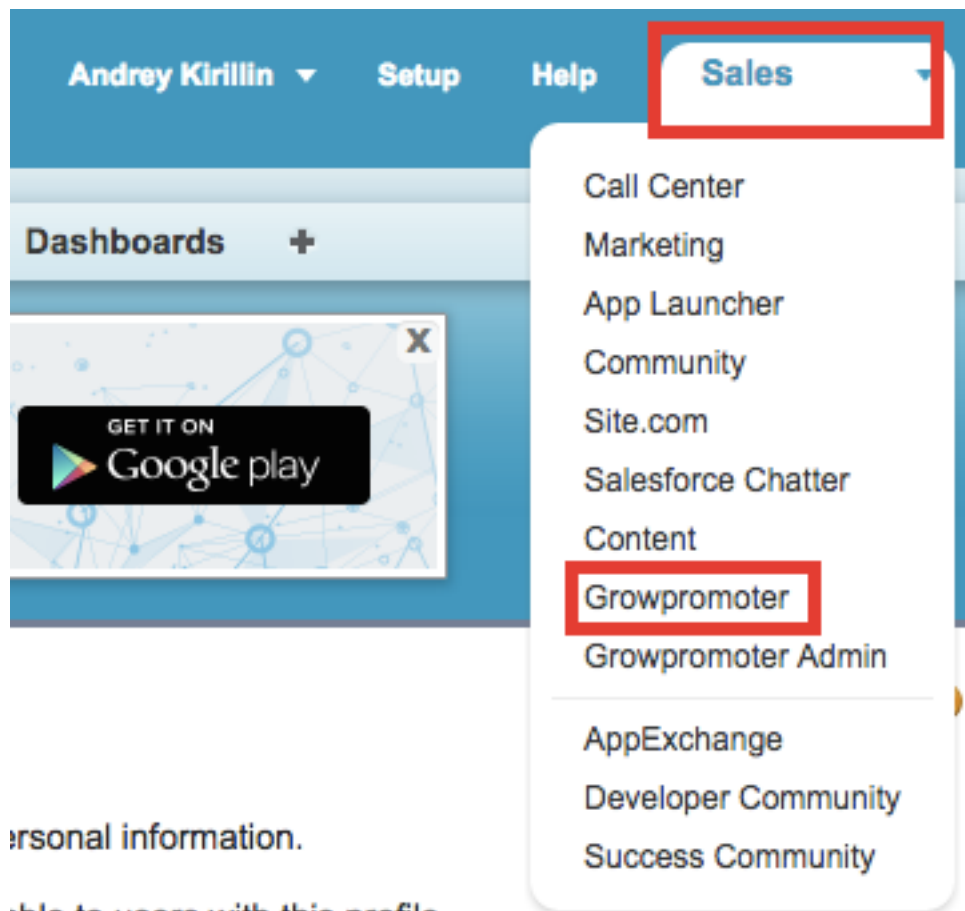
The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Profiles	Page Layout To Use	Page Layout
Username Manager	Contact (Marketing) Layout	Contact (Marketing) Layout
Cross Org Data Proxy User	Contact (Sales) Layout	Contact (Sales) Layout
Custom: Marketing Profile	Contact (Support) Layout	Contact (Support) Layout
Custom: Sales Profile	Contact Layout	Contact Layout
Custom: Support Profile	GrowPromoter Contact Layout	GrowPromoter Contact Layout
Customer Community Login User	Contact (Marketing) Layout	Contact (Marketing) Layout
Customer Community Plus Login User	Contact (Sales) Layout	Contact (Sales) Layout
Customer Community Plus User	Contact (Support) Layout	Contact (Support) Layout
Customer Community User	Contact Layout	Contact Layout
Customer Portal Manager Custom	Contact Layout	Contact Layout
Customer Portal Manager Standard	Contact Layout	Contact Layout
Force.com - App Subscription User	Contact Layout	Contact Layout
Gold Partner User	Contact Layout	Contact Layout
High Volume Customer Portal	Contact Layout	Contact Layout
Marketing User	Contact Layout	Contact Layout
Partner App Subscription User	Contact Layout	Contact Layout
Partner Community Login User	Contact Layout	Contact Layout
Partner Community User	Contact Layout	Contact Layout
Read Only	Contact Layout	Contact Layout
Silver Partner User	Contact Layout	Contact Layout
Solution Manager	Contact Layout	Contact Layout
Standard Platform User	Contact Layout	Contact Layout
Standard User	Contact Layout	Contact Layout
System Administrator	Contact Layout	Contact Layout

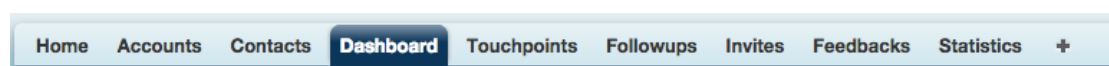
Now you may repeat same steps for Account page layout.

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:

Contact Edit Save Save & New Cancel

Contact Information ! = Required Information

Contact Owner: Andrey Kirillin

First Name: Mr. Andrey

Last Name: Kirillin

Account Name: sForce

Title:

Department:

Birthdate:

Reports To:

Lead Source: --None--

Phone:

Home Phone:

Mobile:

Other Phone:

Fax:

Email: andrey@absi.be

Assistant:

Asst. Phone:

Address Information Copy Mailing Address to Other Address

Mailing Street: The Landmark @ One Market

Mailing City: San Francisco

Mailing State/Province: CA

Mailing Zip/Postal Code: 94087

Mailing Country: US

Other Street:

Other City:

Other State/Province:

Other Zip/Postal Code:

Other Country:

Additional Information

Languages:

Level: --None--

Description Information

Description:

Save Save & New Cancel

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

Information ! = Required Information

TouchPoint Name: My First Touchpoint

Description: This is my first touchpoint

Logo:

End responsible: Andrey Kirillin

Email From Name: ABSI

Email Introduction Text: Our organization is committed to customer satisfaction, and to make sure we are meeting your expectations, I ask

Email Signoff: Thank you for taking the time to participate in our survey. We look forward to receiving your feedback.

Language: English

Name Filter 1:

Name Filter 2:

Name Filter 3:

Name Filter 4:

Graceperiod: 0 months

Group:

Save Save & New Cancel

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:

Permissions for			
User	Invite	Follow-up	Statistics
GrowPromoter Site Guest User	☐	☐	☐
Andrey Kirillin	☒	☒	☒
Sven Delporte	☐	☐	☐
Chatter Expert	☐	☐	☐

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.

Select Contacts						
Save Save & Go to Invite Go to Invite						
Select Account sforce 🔍						
▼ Account Contacts						
☐	Company	First Name	Last Name	Salutation	Email	Phone
☐	sForce	Siddhartha	Nedaerk	Ms.		
☐	sForce	Jake	Llorrac	Mr.		
▼ Selected Contacts						
☒	Company	First Name	Last Name	Salutation	Email	Phone
☒	sForce	Andrey	Kirillin	Mr.	andrey@absi.be	
Save Save & Go to Invite Go to Invite						

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:

Feedback | Opportunities | Cases | Open Activities | Activity History | Campaign History | Notes & Attachments | HTML Email Status | Contact Touchpoints

Contact Detail Edit Delete Clone Request Update Touchpoints

Contact Owner	Andrew Kirillin [Change]	Phone
Name	Bruce Wayne	Home Phone
Account Name	sForce	Mobile
Title		Other Phone
Department		Fax
Birthdate		Email
Reports To	View Org Chart	Assistant
Lead Source		Asst. Phone
Create Feedback	☐	
Mailing Address	The Landmark @ One Market San Francisco, CA 94087 US	Other Address
Created By	Andrew Kirillin , 6-1-2015 14:32	Last Modified By
Description		Andrew Kirillin , 6-1-2015 14:32

▼ GrowPromoter Filters

Filter 1	Filter 3
Filter 2	Filter 4

Edit Delete Clone Request Update Touchpoints

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.