Get Started with Partner Recruitment App

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CONTENTS

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Partner Recruitment App

Close the onboarding circle and cut down lead recruitment time with the Partner Recruitment App! This app is designed to easily create robust questionnaires that are emailed to your leads. Lead owners are notified when the questionnaire is completed. With the Partner Recruitment app you can:

- **Create partner recruitment forms with predefined fields or questions**
- **Pick and choose from a list of questionnaires to be sent to new partner leads**
- **Customize and send an email to partner leads that contains a link to the questionnaire**
- **Get responses from partners even if they are not part of a community**
- **Receive notifications when the questionnaire is completed**
- **Review the responses to the questionnaire**

Important: Salesforce Labs is a program that lets Salesforce employees share AppExchange apps they've created. Inspired by employees' work with customers of all sizes and industries, these apps range from simple utilities to entire vertical solutions. Salesforce Labs apps aren't official Salesforce products, and aren't supported by Salesforce Customer Support. Future Salesforce releases won't include updates to Salesforce Labs products. For help on any Salesforce Labs app please consult the Salesforce message boards.

Set Up Partner Recruitment App

This guide is designed to help you set up the Partner Recruitment App in Salesforce Lightning

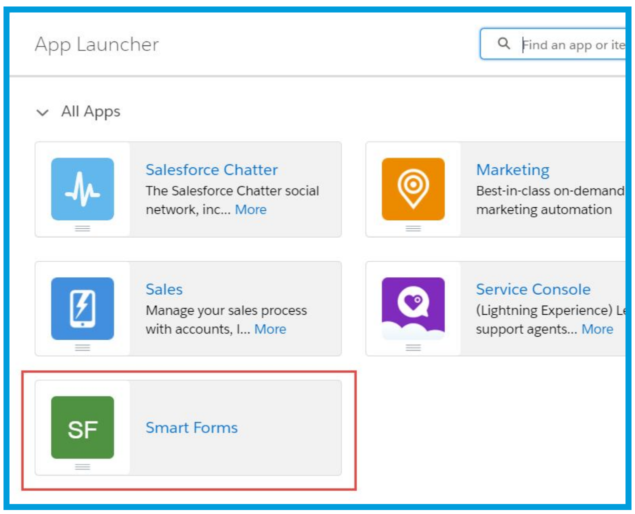
To install and configure the Partner Recruitment App:

1. Go to AppExchange (https://appexchange.salesforce.com) and search for Partner Recruitment App
2. Log into your org and install Partner Recruitment App for all users
3. Get confirmation that package has been installed
4. View Partner Recruitment App in your Salesforce Org

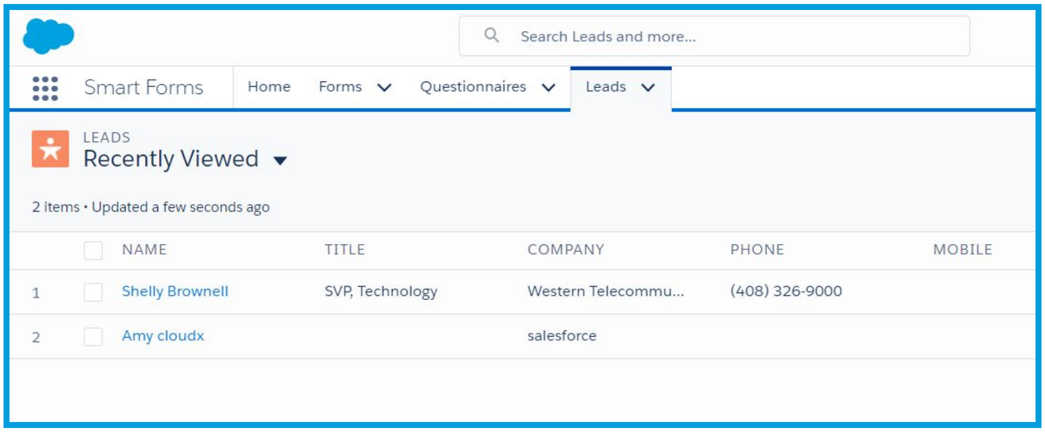
User Permissions Needed	
To install AppExchange packages:	Download AppExchange Packages permission
Other user permissions needed?	

Once the package has been downloaded:

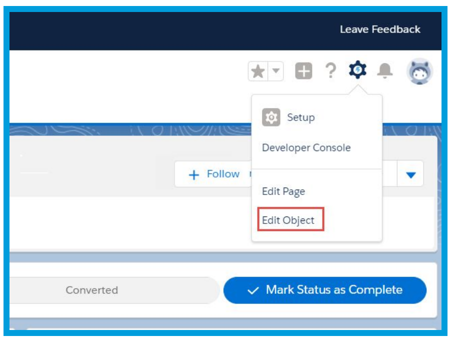
1. Go to the App Launcher and open the **Smart Forms** App



2. Go to the **Leads** tab and select a lead to add the **Assign Lead to Questionnaire** custom button to lead page layout.

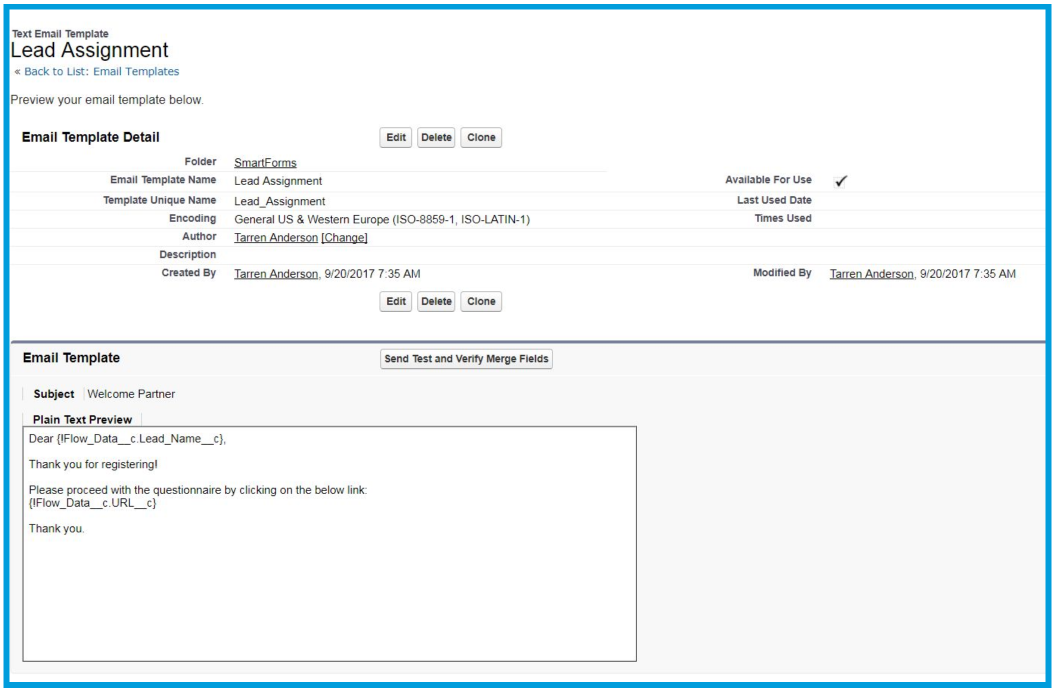


   a. **Edit Object**



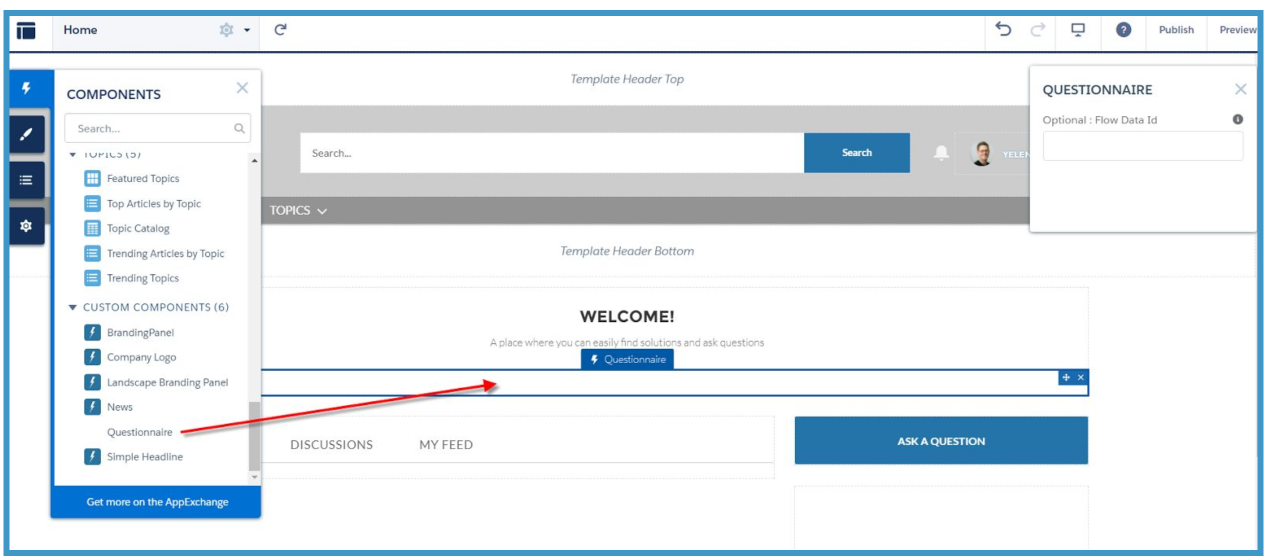
   b. **Page Layouts.** Select the layout for the leads who will be assigned to recruitment questionnaires.
   c. Go to **Buttons** and drag the **Assign Lead to Questionnaire** button onto the layout (the button will display in Salesforce Classic). Go to **Mobile & Lightning Actions** and drag the **Assign Lead to Questionnaire** action onto the layout (the button will display in Salesforce Lightning).
   d. Save.

3. Customize Email Templates.
   a. Go to **Setup** and select **Email Templates**. Choose **SmartForms** folder.
   b. You can use this text for the **Lead Assignment** template: Leads receive this email template when a questionnaire is assigned to them. Modify this template to reflect the email you would like your leads to receive. Be aware that {!Flow_Data__c.URL__c} represents the individual link sent to this lead and should not be customized.



c. The **Lead Flow Notification** template is used to send an email to the lead owner when a questionnaire has been completed.

4. Customize Your Community
   a. Go to **Setup** and select **All Communities**
   b. Select your community
   c. Open **Builder** and go to **Components**
   d. Drag the **Questionnaire** component to the Home Page (This component can be found under Custom Components section)



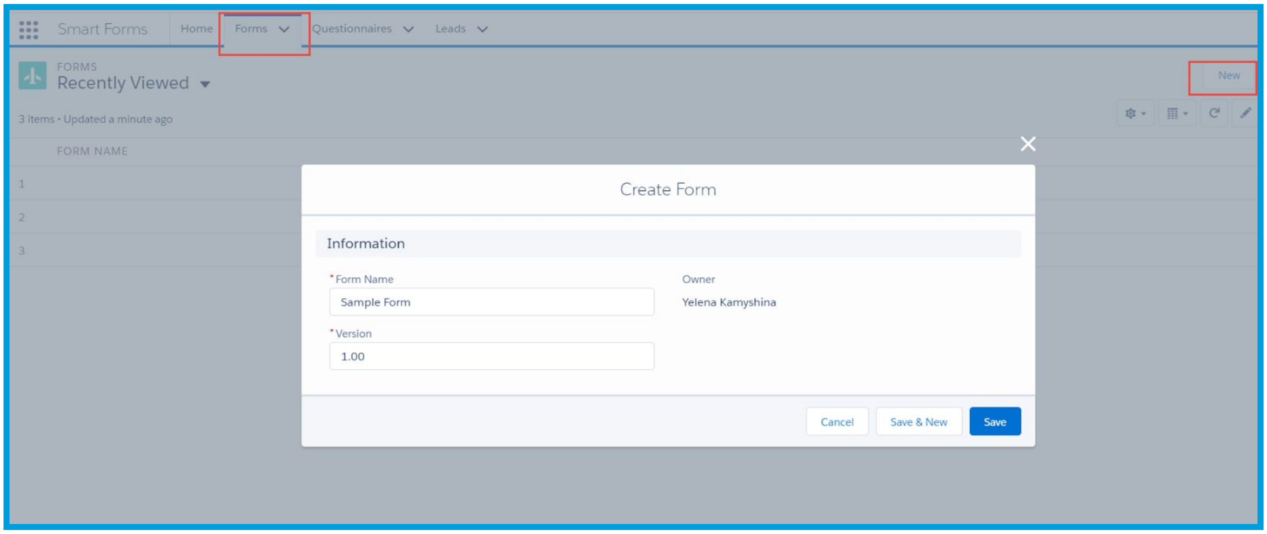
   e. Publish

Congratulations! The Partner Recruitment App is ready to use! Wasn't that easy?

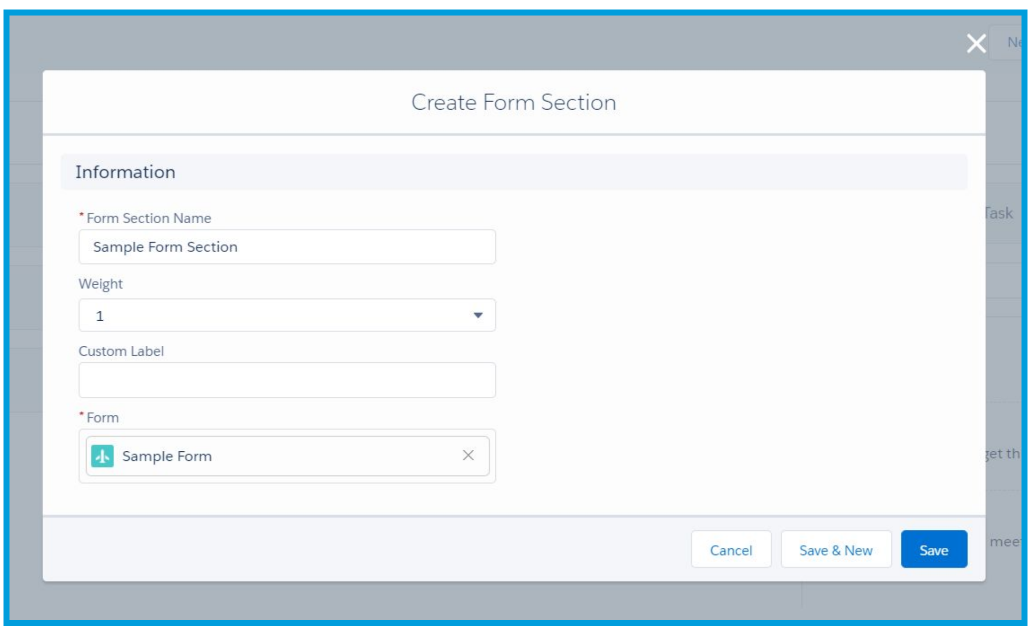
Now let's **configure a Questionnaire.**

Start by creating a form. Later you can reuse previously created forms from the Form Library.

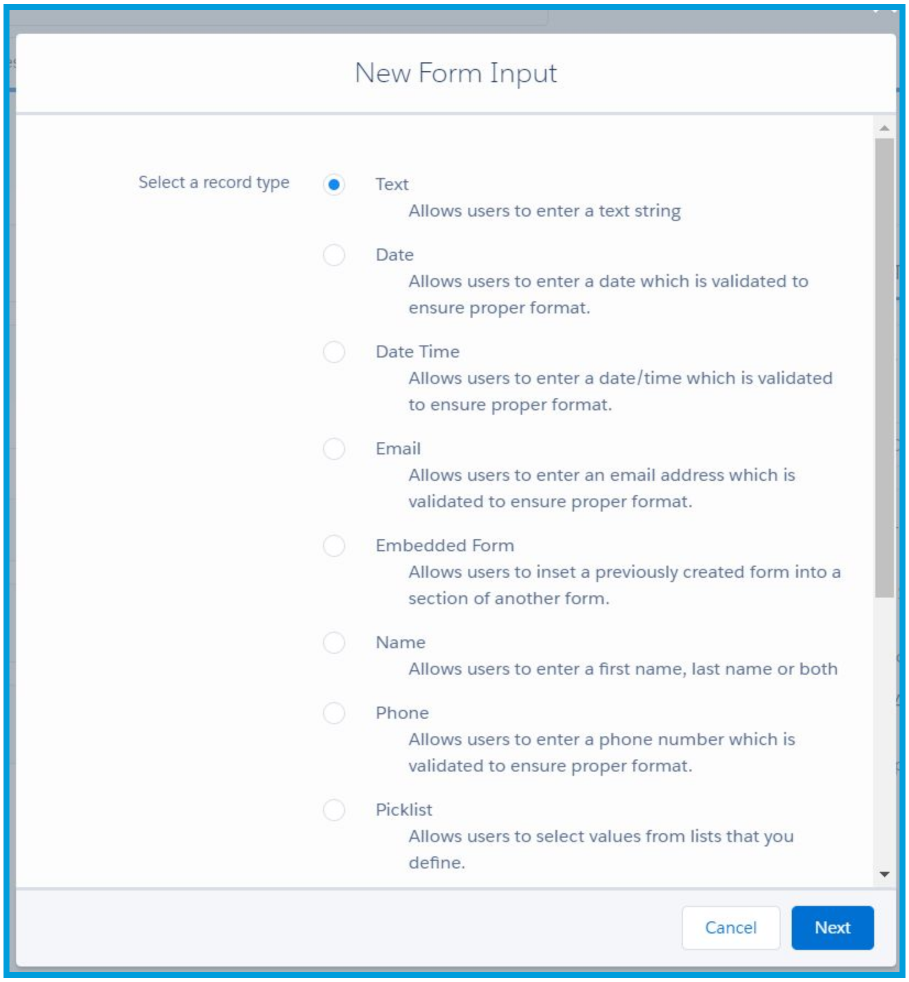
1. Go to the **Forms** and click **New**
    a. Enter the form name
    b. Enter a version number



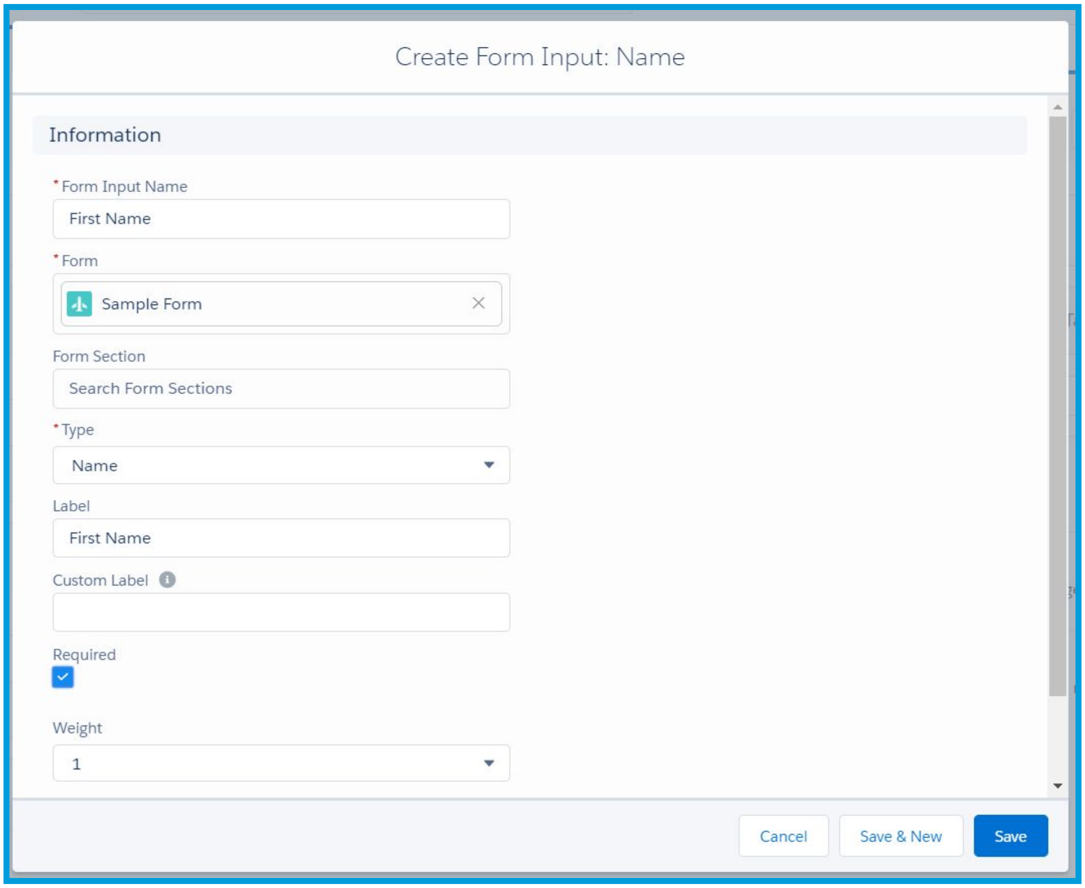
2. Create a Section from the form related list
    a. Click **New** in Form Sections
    b. Enter **Form Section Name**
    c. Enter "1" in the **Weight** field to indicate that this section will be the first to appear in order of sections.
    d. Optionally enter the **Custom Label** field. **NOTE:** You must first create a Custom Label in Setup>>Custom Labels. Then input the Name of the previously created custom label.
    e. The form this section will look up to should already be selected
    f. Click **Save**



3. Add Form Inputs. These are the individual fields (or a nested form) that leads will view or fill out on the form.
    a. Click **New** on Form Input and select the form input record type.

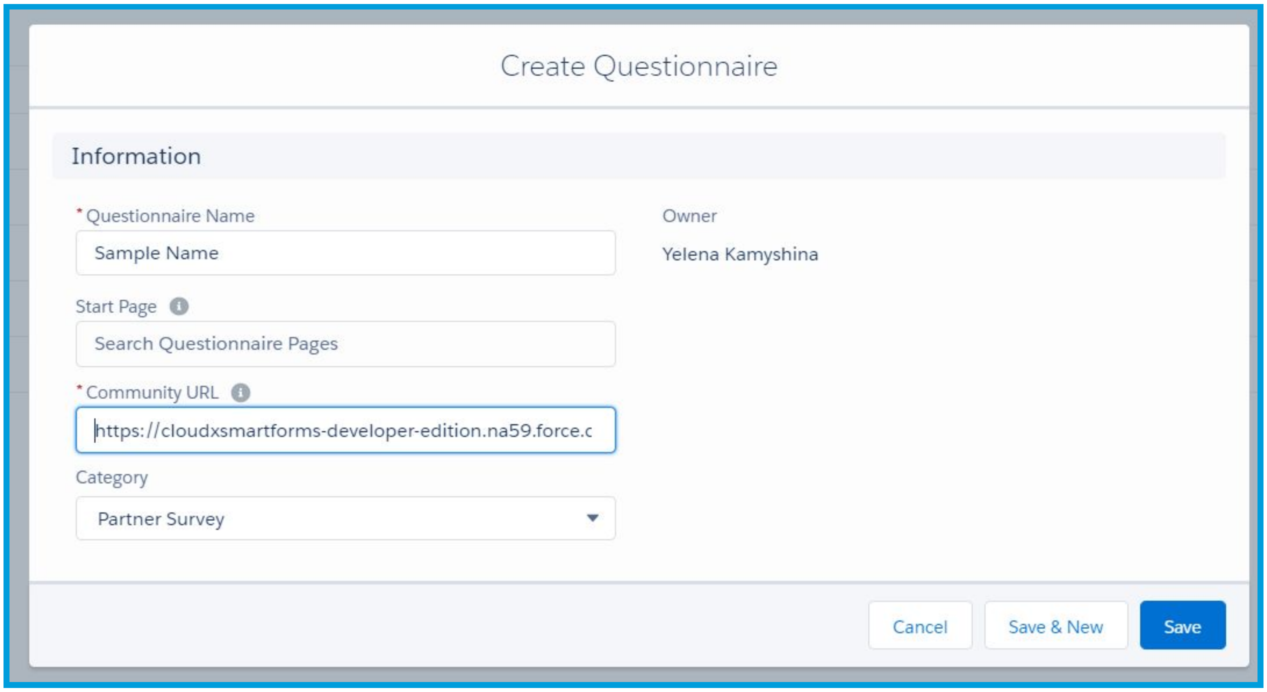


    b. Fill out the fields in the Form Input Record Type. You will only see the appropriate fields based on record type selection. All fields are explained below:
        i. Enter the **Form Input Name.**
        ii. Lookup to the appropriate **Form**.
        iii. The **Form Section** field is automatically populated.
        iv. The **Type** field is automatically populated
        v. Enter the **Label** that leads will see when filling out the questionnaire.
        vi. Optionally enter the **Custom Label** field. **NOTE:** You must first create a Custom Label in Setup>>Custom Labels. Then input the Name of the previously created custom label.
        vii. **Weight** determines the order of your fields to appear within the section.
        viii. Determine if the field is required. **Required** is not an option for irrelevant fields such as static text field.
        ix. If **Embedded Form** is selected as the record type, you may embed a form within a section of another form.
        x. Save and add as many inputs per section as needed.



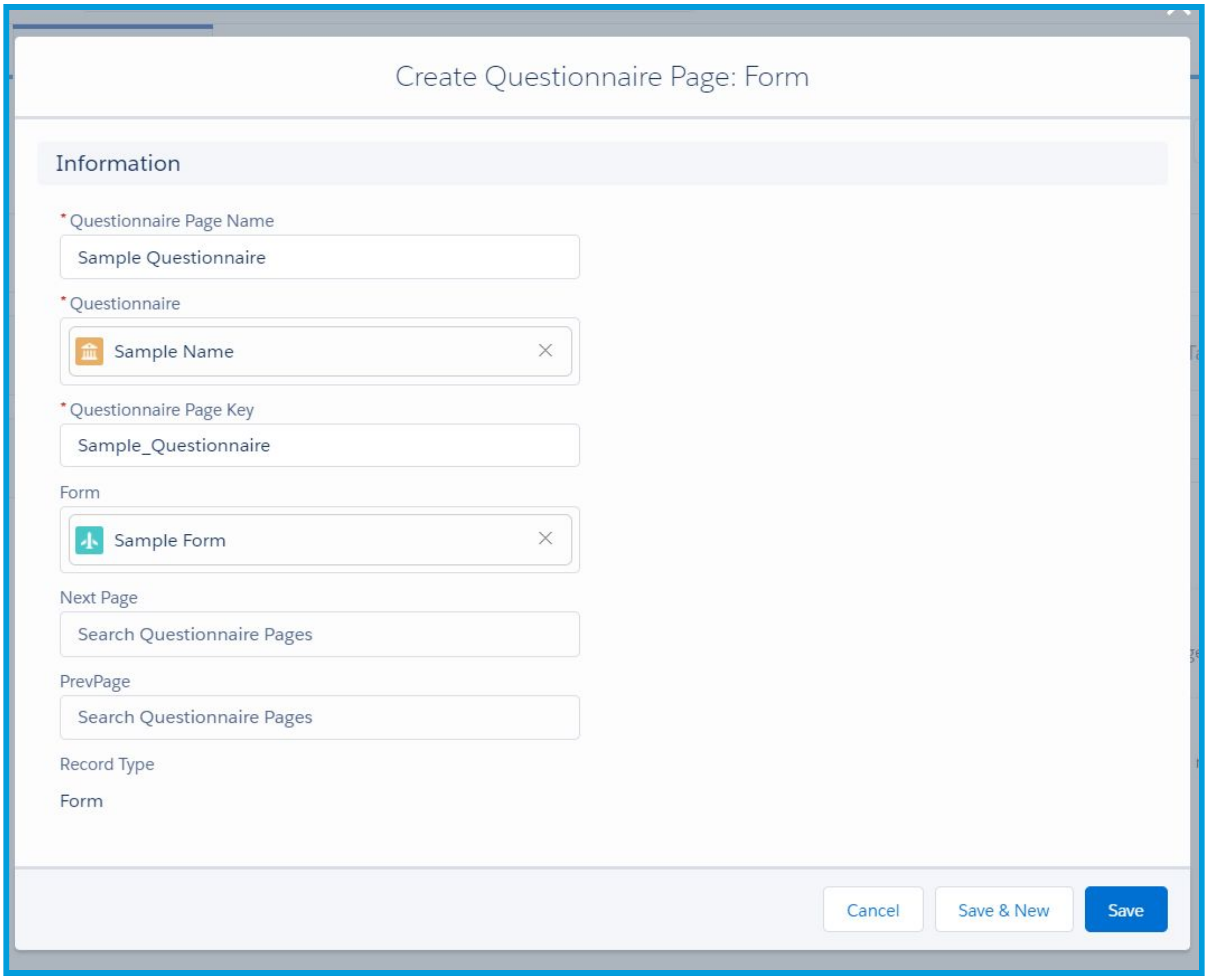
Now the Form is created. Let's create a Questionnaire. The questionnaire is the combination of all of the forms you would like to show to your lead.

4. Go to the **Questionnaire** tab and click **New**
    a. Enter a Questionnaire Name
    b. Leave Start Page empty until you create pages. **Note:** You will need to come back and add a start page before your questionnaire is available for assignment to lead.
    c. Enter the url of the community that you want to display the Questionnaire component on. You can find your community URL by going to Setup and selecting **All Communities** . Copy/Paste the URL from the appropriate community.
    d. Enter a Category

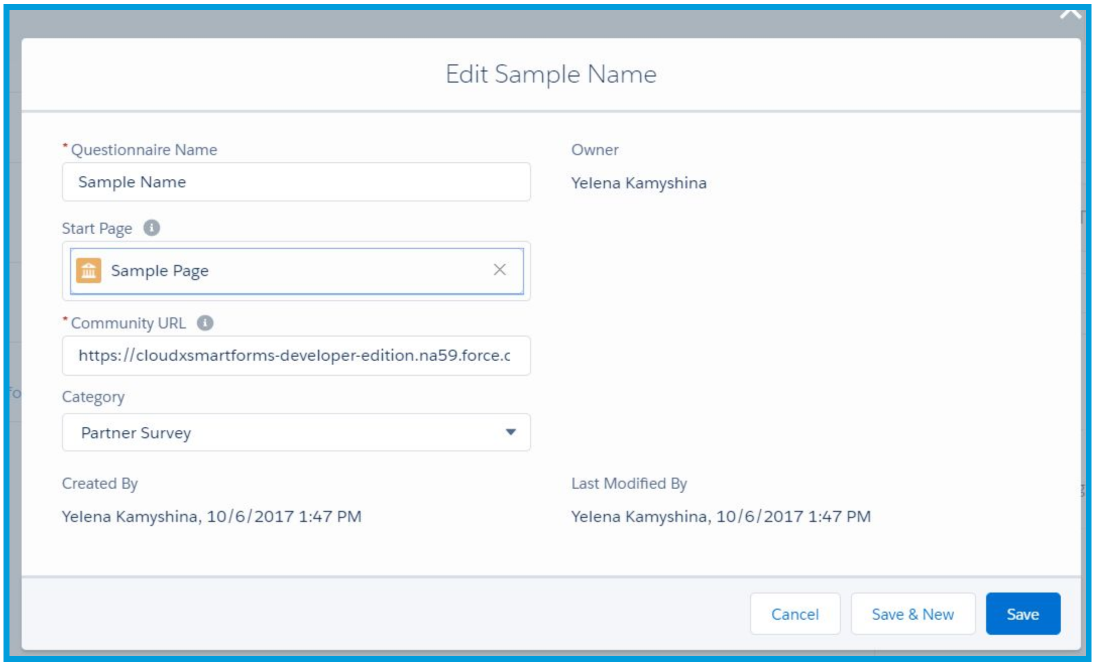


5. Add a Questionnaire Page. A questionnaire page represents a step in your questionnaire. Questionnaires can be made up of multiple questionnaire pages. For example, your registration form might be a 3-step process - where each step is represented by a questionnaire page. Questionnaire pages allow you to segment your process into smaller, individual steps
    a. Create a Questionnaire Page from the related list by clicking **New**
    b. Enter a **Questionnaire Page Name**
    c. The **Questionnaire** should be selected
    d. Enter **Questionnaire Page Key** like: Questionnaire_Page_Name
    e. Select the **Form** you created earlier
    f. **Next Page**: For questionnaires with multiple pages, enter Next Page **for every page but the last.**
    g. **PrevPage**: For questionnaires with multiple pages, enter Prev Page **for every page but first.**

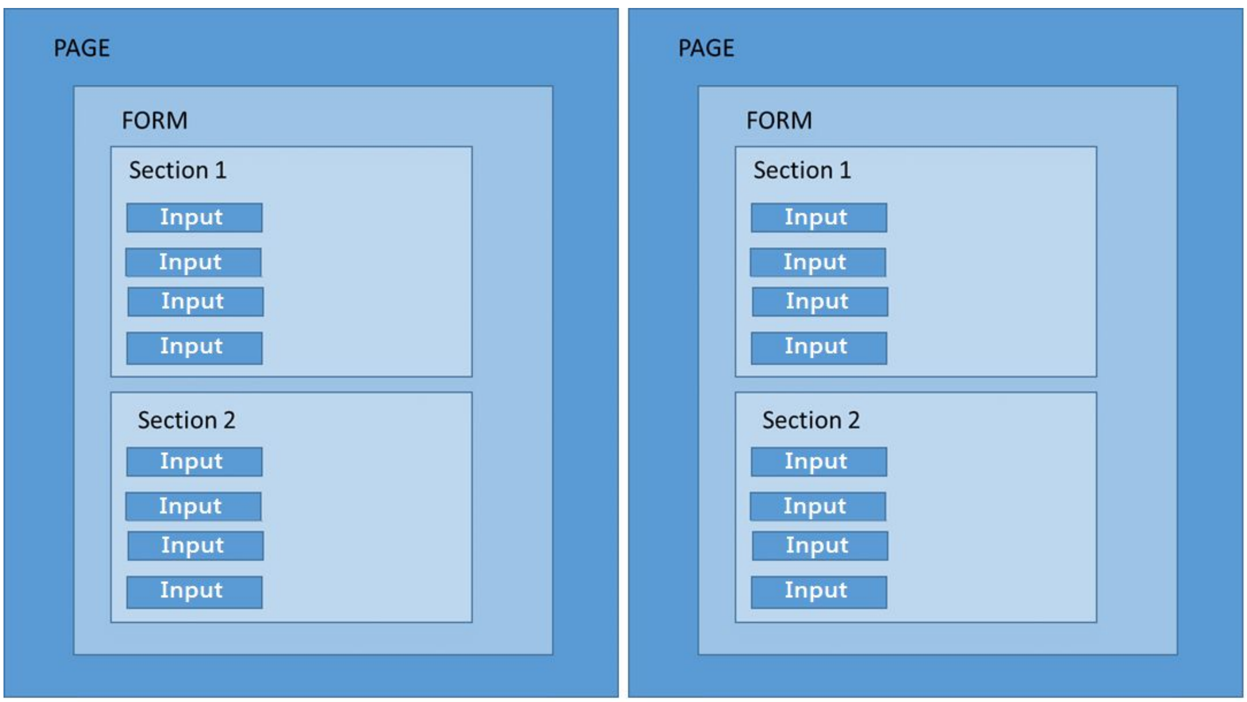
If a questionnaire contains 3 pages: Page 1 must have a Next Page, Page 2 must have a Prev and Next Page and Page 3 must have a Prev Page.



6. Add Start Page to Questionnaire
    a. Go back into your Questionnaire and click **Edit**
    b. Enter a s **Start Page**

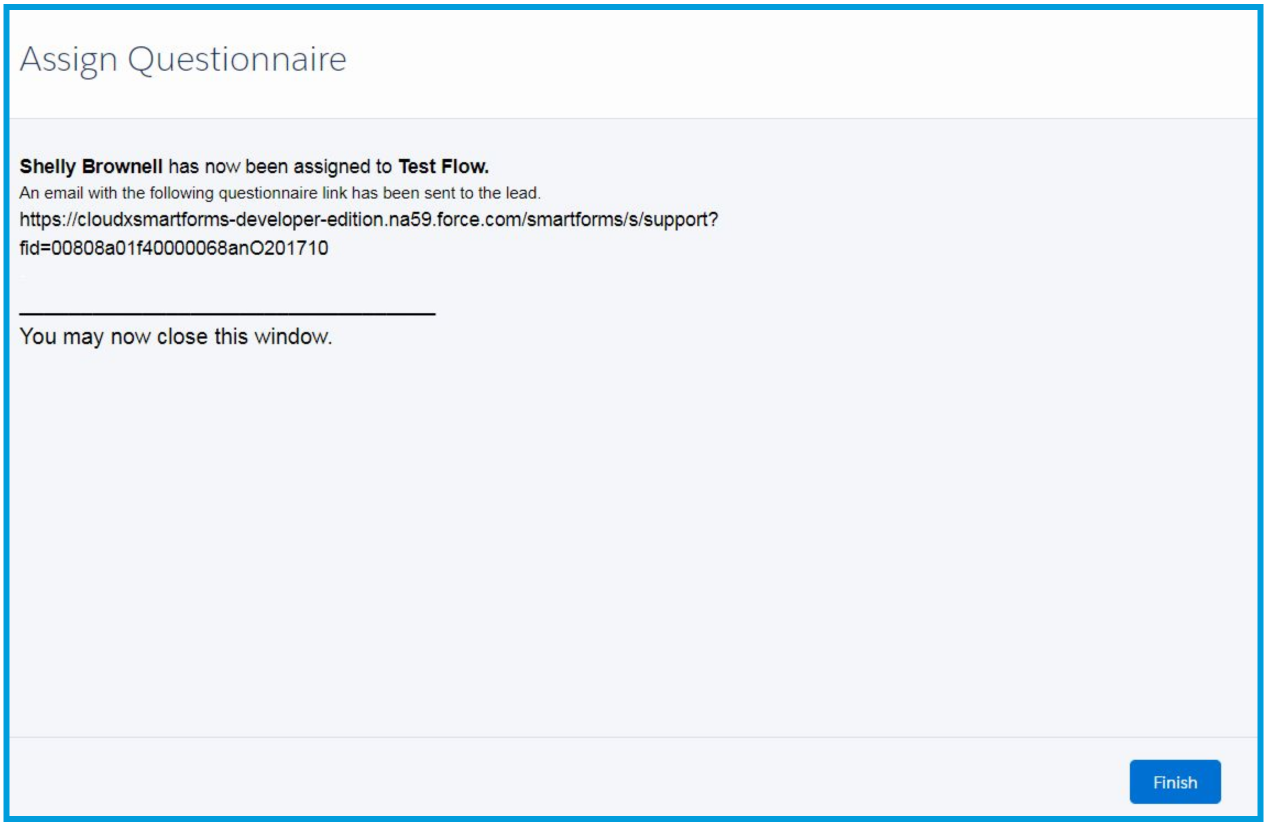


Your questionnaire is complete! When you create robust questionnaires with multiple pages, forms, sections, inputs and embedded forms, the resulting hierarchy of the questionnaire will look something like this:

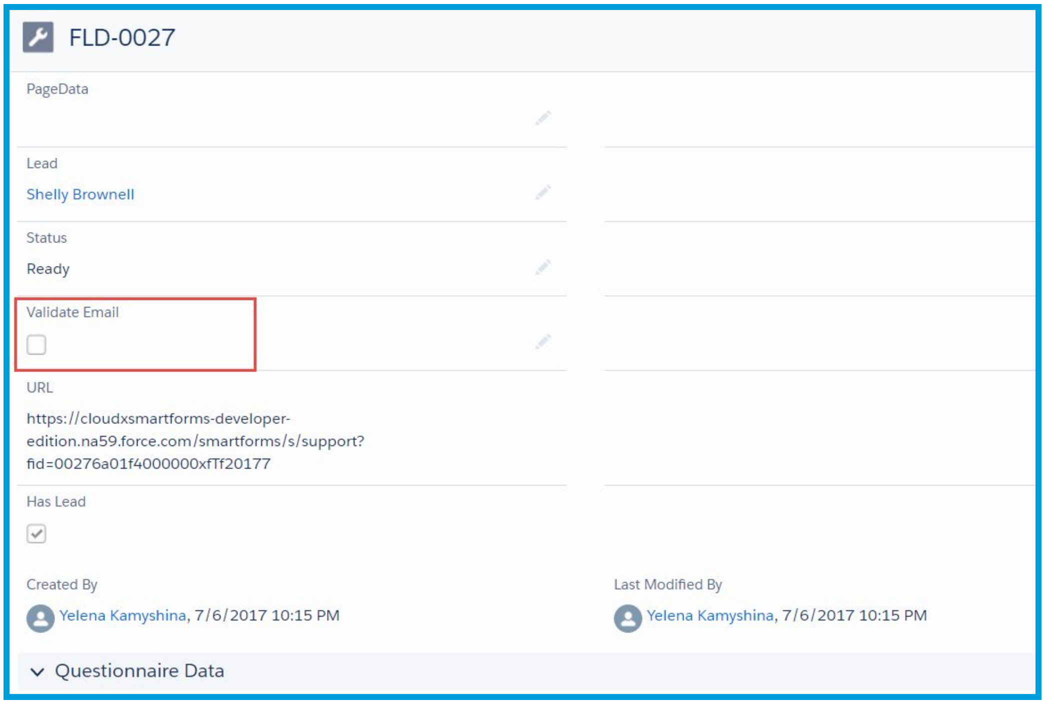


Let's associate the new Questionnaire to a Lead

7. Assign Lead to Questionnaire
    a. Go to the Lead record and click the **Assign Lead to Questionnaire** action. This is the custom button you previously added to the Lead page layout.
    b. You've now launched a process that allows you to update email, assign the created questionnaire and send out your email template.
        i. You can update the email address for the lead if it is not correct. Click **Next**.
        ii. Select the questionnaire you want to send to the lead. This list will have all of the questionnaires created within your org as long as they have a start page. Click **Next**.
        iii. An email has now been sent to the Lead (using the Lead Assignment email template). The unique link to the questionnaire is also displayed on this screen.

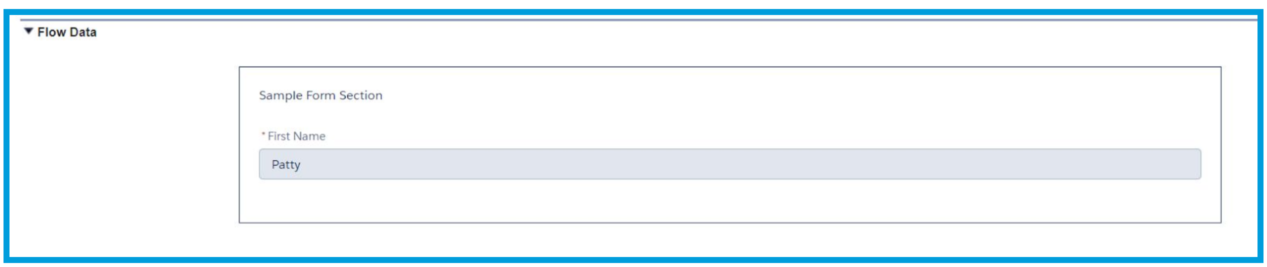


    c. The association of a questionnaire to a lead creates a Questionnaire Data record. You can see all of the Questionnaire Data records on the Lead by:
        i. Clicking **Edit** on the Lead Layout
        ii. Go to the **Related List** section and drag Questionnaire Data onto the layout
        iii. Save
    d. The Lead does not have to be authenticated to fill out the questionnaire as long as you make sure your community is properly set up for public access.   However, you have the option of asking the lead to verify their email.
        i. Go to Questionnaire Data record before a Lead has had a chance to fill out the questionnaire.
        ii. Select **Validate Email**.



When the Lead completes the questionnaire, the data entered into the questionnaire is saved and the lead owner receives a notification that the form has been submitted. As previously mentioned, you can customize this notification via the Lead Flow Notification Email template.

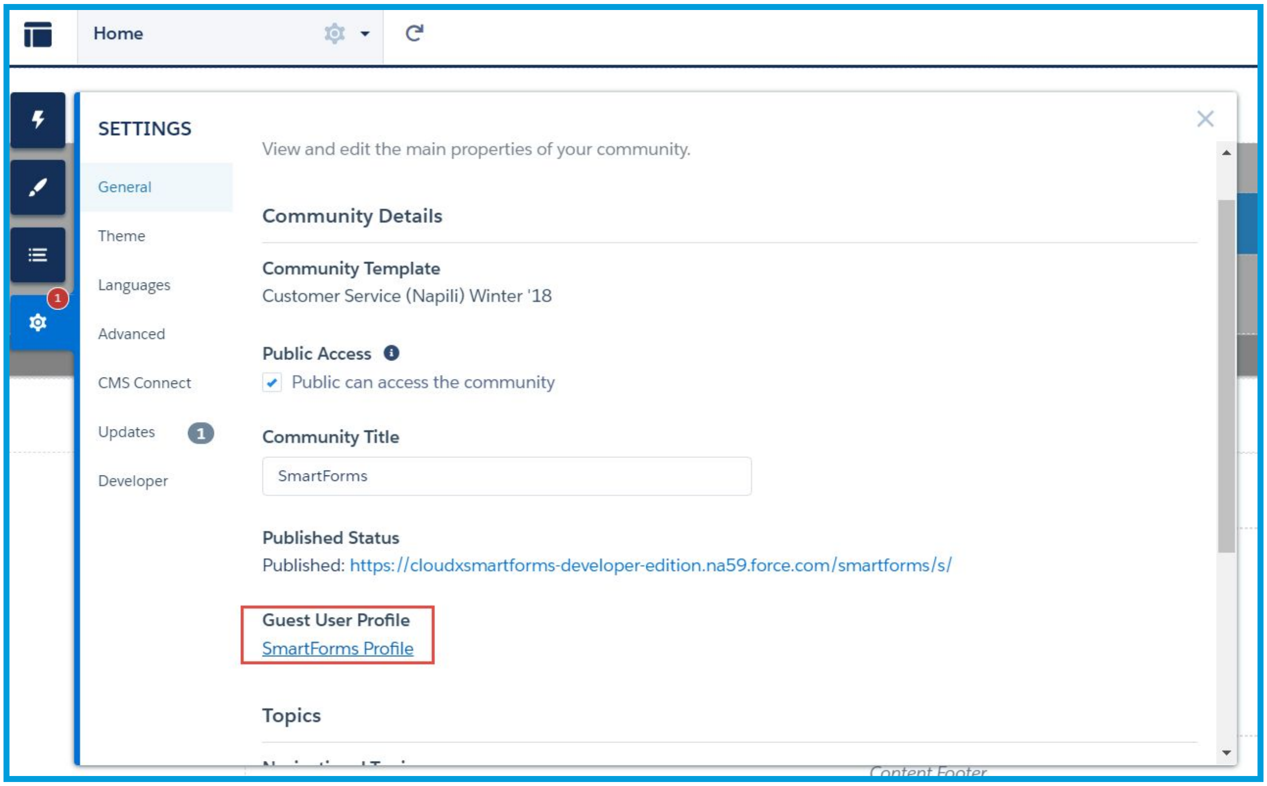
8. The lead owner views the completed questionnaire by clicking on the link in the email. This takes the lead owner directly to the Questionnaire Data record with completed info.



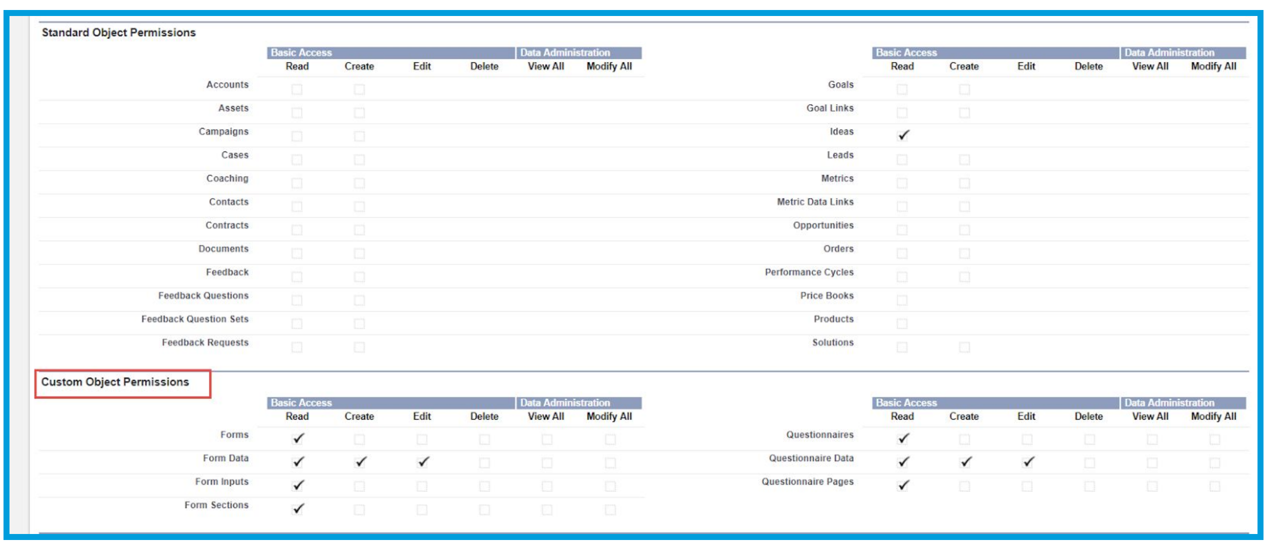
Set Up Guest User Profile

In order for guest users to properly access the questionnaires, you must grant Guest User profile access to objects and fields that are part of the Partner Recruitment App

1. From **Community Builder**, click the **Settings** icon and select **General**.
   Click the link for the profile name under **Guest User Profile**.



2. In the **Custom Object Permissions** section, setup **Form, Form Data, Form Input, Form Section, Questionnaire, Questionnaire Date and Questionnaire Page** CRUD permissions in the following manner:



3. In the **Field-Level Security Section**, got to **Custom Field-Level Security** and set up each object in the following manner.

Field-Level Security

Standard Field-Level Security

Account	[View]	Idea	[View]
Asset	[View]	Lead	[View]
Asset Relationship	[View]	Metric	[View]
Campaign	[View]	Opportunity	[View]
Campaign Member	[View]	Opportunity Product	[View]
Case	[View]	Order	[View]
Coaching	[View]	Order Product	[View]
Contact	[View]	Performance Cycle	[View]
Contract	[View]	Price Book	[View]
Email Message	[View]	Price Book Entry	[View]
Event	[View]	Product	[View]
Feedback	[View]	Social Persona	[View]
Feedback Question	[View]	Solution	[View]
Feedback Question Set	[View]	Task	[View]
Feedback Request	[View]	User	[View]
Goal	[View]	User Provisioning Request	[View]
Goal Link	[View]		

Custom Field-Level Security

Form	[View]	Questionnaire	[View]
Form Data	[View]	Questionnaire Data	[View]
Form Input	[View]	Questionnaire Page	[View]
Form Section	[View]		

a. **Forms**

Form Field-Level Security for profile

SmartForms Profile

Help for this Page

Edit | Back to Profile

Field Name	Field Type	Read Access	Edit Access
Created By	Lookup	✓	
Form Name	Text	✓	✓
Last Modified By	Lookup	✓	
Owner	Lookup	✓	✓
Version	Number	✓	✓

Edit | Back to Profile

b. **Form Data**

Form Data Field-Level Security for profile

SmartForms Profile

Help for this Page

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Field Name	Field Type	Read Access	Edit Access
Code	Text	✓	
Created By	Lookup	✓	
Data	Long Text Area	✓	✓
Email	Email		
Flow Data	Lookup	✓	✓
Form	Lookup	✓	✓
Form Data Name	Auto Number	✓	
Last Modified By	Lookup	✓	
Owner	Lookup	✓	✓
Read Only	Checkbox	✓	✓

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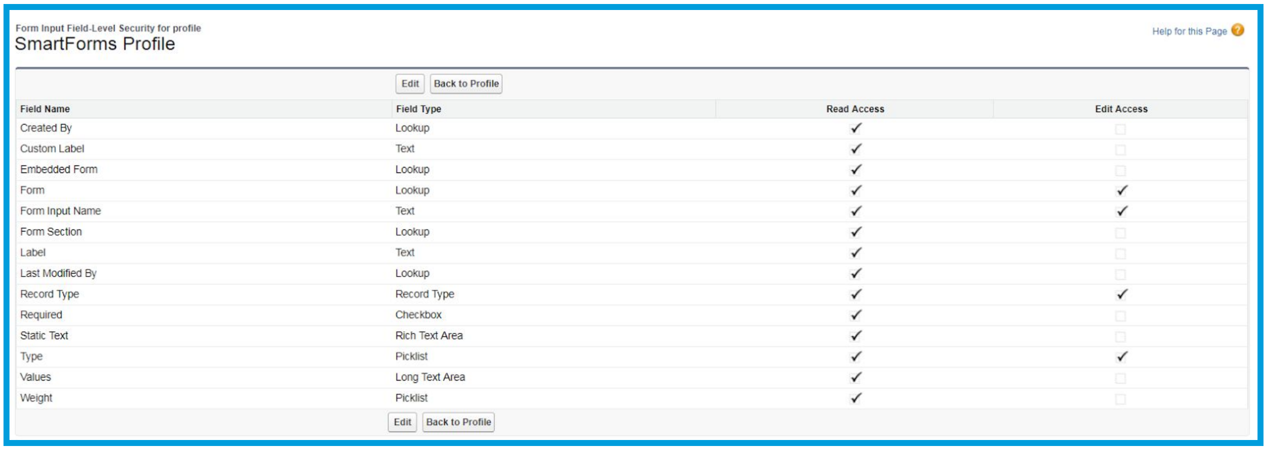
c. **Form Input**



Form Input Field-Level Security for profile
SmartForms Profile

Help for this Page

Edit | Back to Profile

Field Name	Field Type	Read Access	Edit Access
Created By	Lookup	✓	
Custom Label	Text	✓	
Embedded Form	Lookup	✓	
Form	Lookup	✓	✓
Form Input Name	Text	✓	✓
Form Section	Lookup	✓	
Label	Text	✓	
Last Modified By	Lookup	✓	
Record Type	Record Type	✓	✓
Required	Checkbox	✓	
Static Text	Rich Text Area	✓	
Type	Picklist	✓	✓
Values	Long Text Area	✓	
Weight	Picklist	✓	

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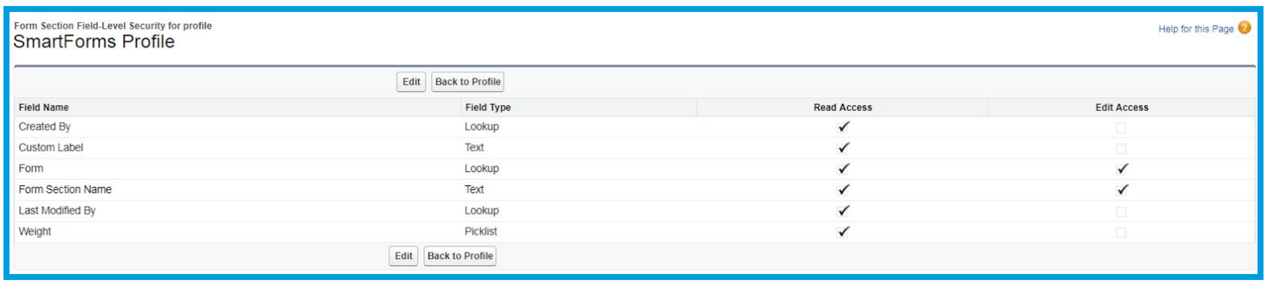
d. Form Section



Form Section Field-Level Security for profile
SmartForms Profile

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Field Name	Field Type	Read Access	Edit Access
Created By	Lookup	✓	
Custom Label	Text	✓	
Form	Lookup	✓	✓
Form Section Name	Text	✓	✓
Last Modified By	Lookup	✓	
Weight	Picklist	✓	

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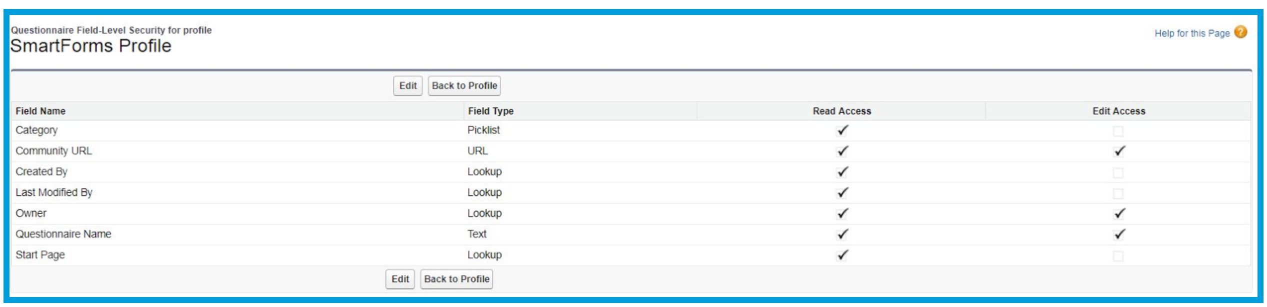
e. Questionnaire



Questionnaire Field-Level Security for profile
SmartForms Profile

Help for this Page

Edit | Back to Profile

Field Name	Field Type	Read Access	Edit Access
Category	Picklist	✓	
Community URL	URL	✓	✓
Created By	Lookup	✓	
Last Modified By	Lookup	✓	
Owner	Lookup	✓	✓
Questionnaire Name	Text	✓	✓
Start Page	Lookup	✓	

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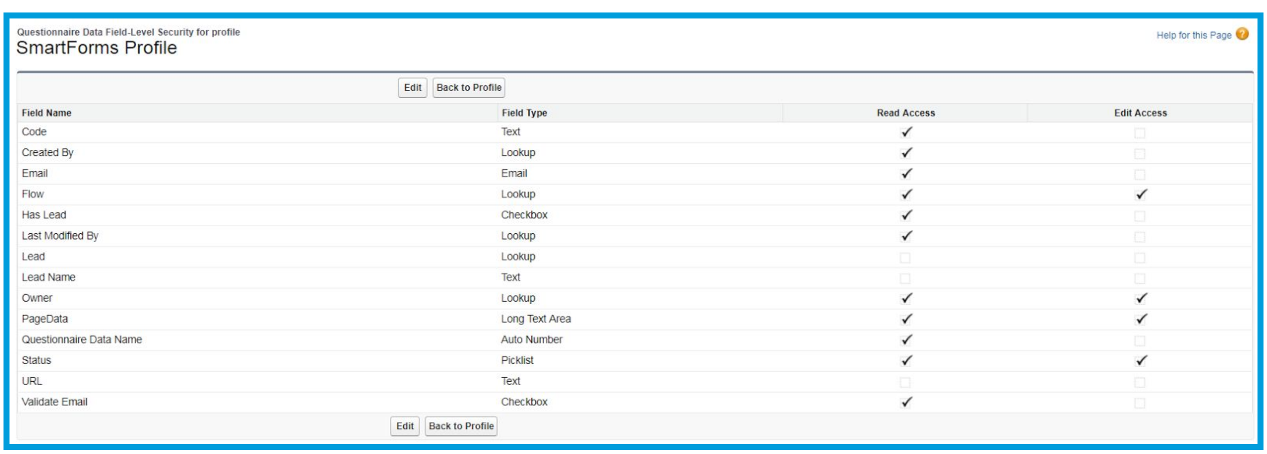
f. Questionnaire Data



Questionnaire Data Field-Level Security for profile
SmartForms Profile

Help for this Page

Edit | Back to Profile

Field Name	Field Type	Read Access	Edit Access
Code	Text	✓	
Created By	Lookup	✓	
Email	Email	✓	
Flow	Lookup	✓	✓
Has Lead	Checkbox	✓	
Last Modified By	Lookup	✓	
Lead	Lookup		
Lead Name	Text		
Owner	Lookup	✓	✓
PageData	Long Text Area	✓	✓
Questionnaire Data Name	Auto Number	✓	
Status	Picklist	✓	✓
URL	Text		
Validate Email	Checkbox	✓	

Edit | Back to Profile

g. Questionnaire Page

Questionnaire Page Field-Level Security for profile

SmartForms Profile

Help for this Page

Edit | Back to Profile

Field Name	Field Type	Read Access	Edit Access
Created By	Lookup	✓	
Form	Lookup	✓	
Last Modified By	Lookup	✓	
Next Page	Lookup	✓	
PrevPage	Lookup	✓	
Questionnaire	Lookup	✓	✓
Questionnaire Page Key	Text	✓	✓
Questionnaire Page Name	Text	✓	✓
Record Type	Record Type	✓	✓

Edit | Back to Profile

Considerations When Using Partner Recruitment App

Make sure you consider the following before installation:

- There are no special considerations when using the Partner Recruitment App