Salespulse

Moving the deal forward just got easier...
Gain insights. Build trust. Close deals.

SALESPULSE
USER GUIDE

Contents

Below you will find the user guide for advanced configurations for Salespulse.

If you run into any problems please contact us:

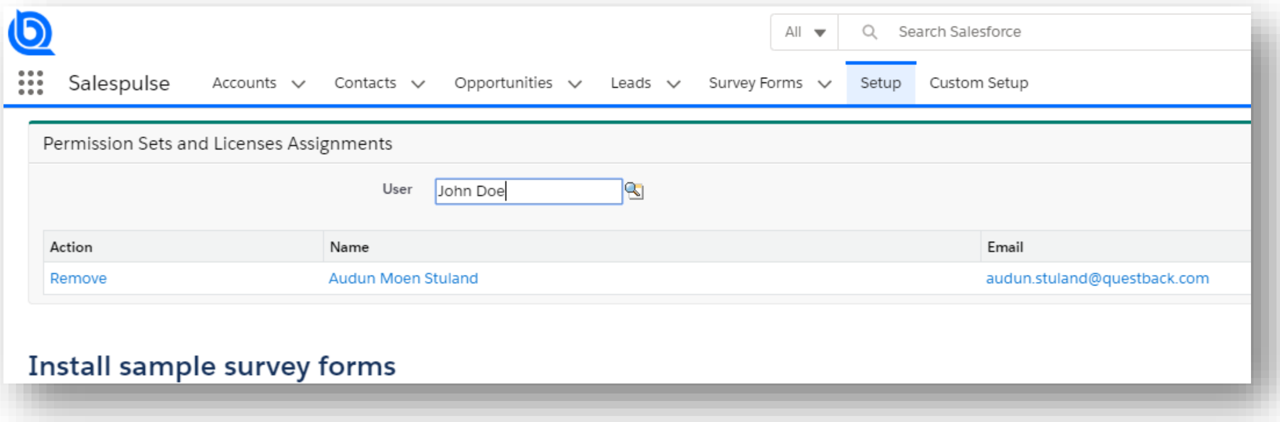
email: support@qbsalespulse.com, phone: (+47) 412 12 820.

Note: For all steps, please ensure that you are logged in as a System Administrator

Adding users and permission sets

You manage the users through the Setup tab on the Salespulse app.

1. Navigate to the Salespulse app and click on Setup tab.
2. Search for the user you want to assign license to and click on **Add User.** You can also remove the Salespulse license from users by clicking on **Remove**.



You can also add licenses via the Salesforce Setup->Installed Packages and then click on Manage Licenses next to the Salespulse app.

The following license and permission set is needed for each user:

User	License	Permission set
Salespulse Site Guest User	▪ Salespulse license	▪ Provide Feedback
All users that are going to use Salespulse	▪ Salespulse license	▪ View and Request Feedback

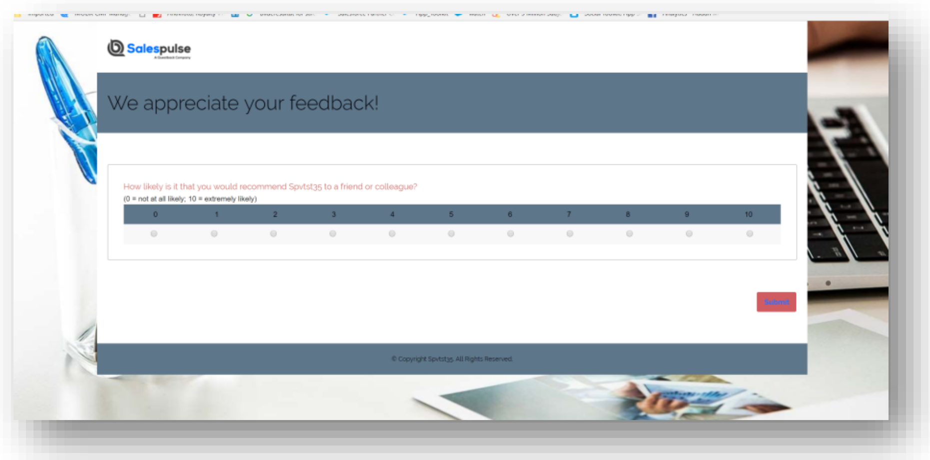
In the Salesforce Winter release 2020 by default all profiles does not have read access to custom settings. Every user need read access to the Salespulse custom settings for setting up the correct survey link and theme for the survey.
This needs to be added by navigating to the desired Profile-> Edit and then go to Administrative settings and then check the "**View all custom settings"** checkbox for the profiles that you want to give Salespulse to.

Salespulse includes the following Permission sets

- **Provide Feedback** – Provides access to the guest user to create survey objects when a user sends in a survey
- **View and Request feedback** – Provides access to the users to run the sending code of the survey object in Salespulse

- **Salespulse custom fields** – Provides access to all the custom fields and objects in Salespulse.

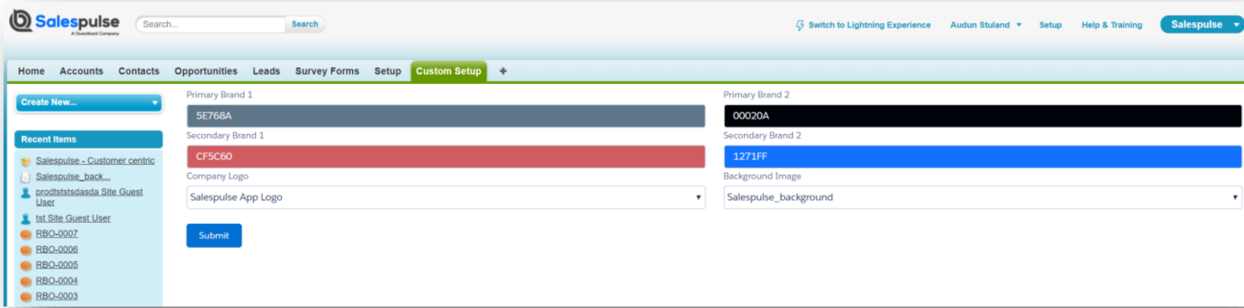
How to add a company logo and background image



You can use image files uploaded in Documents to be used as a company logo or survey background.

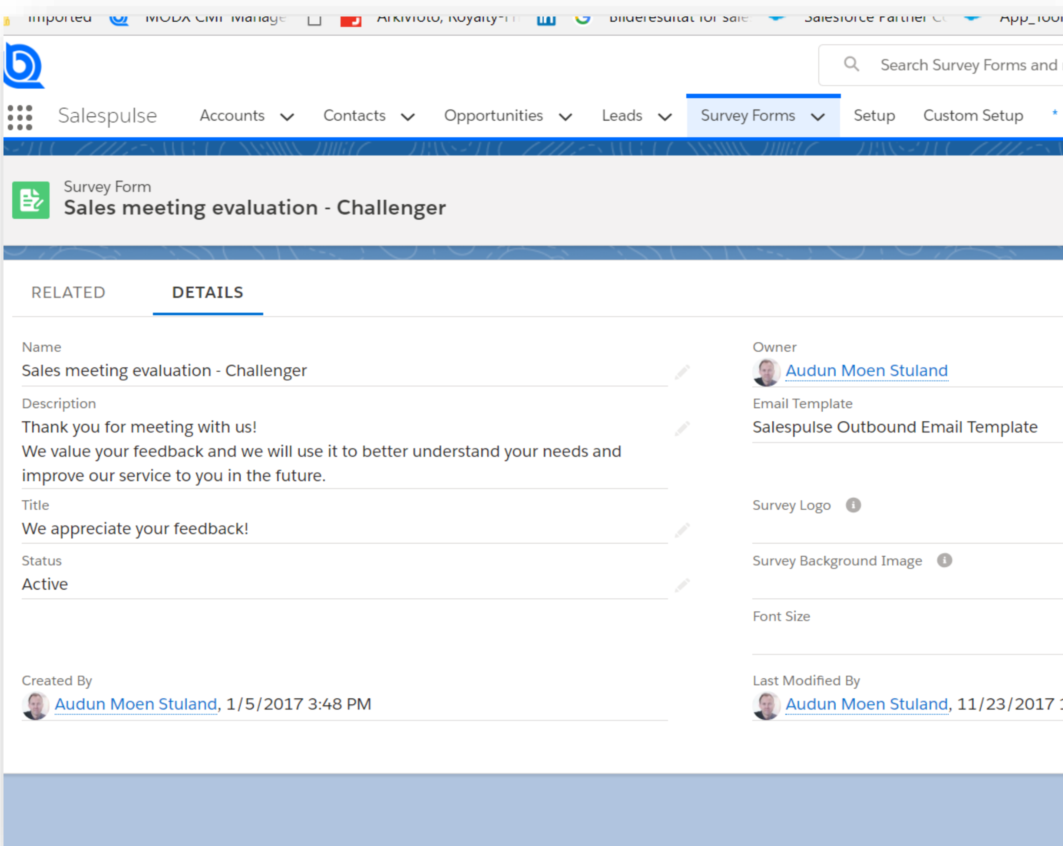
1. From **Classic**, navigate to the **Documents** object
2. Next to **Recent Documents,** click **New**
3. Enter any Document Name and Document Unique Name, check the box next to **Externally Available Image** and choose **Salespulse Documents** from the Folder picklist
4. Select the file by clicking **Choose File** next to File to upload
5. Select the file, click **Open**, and then click **Save**

It you go to the Custom Setup tab under the Salespulse application you can select your new logo and background image. It will only let you choose between images you uploaded in the Salespulse Documents folder. Choosing logo and background image here will use this as the default image on all surveys. If you want to select differnet logos and background images for each survey you can do that on the survey template.



Selecting logo and background on each survey template

1) Navigate to the Salespulse app and the Survey Form Tab. Here you can add the Survey Logo and the Survey Background Image. You can also set the font of the Description text.

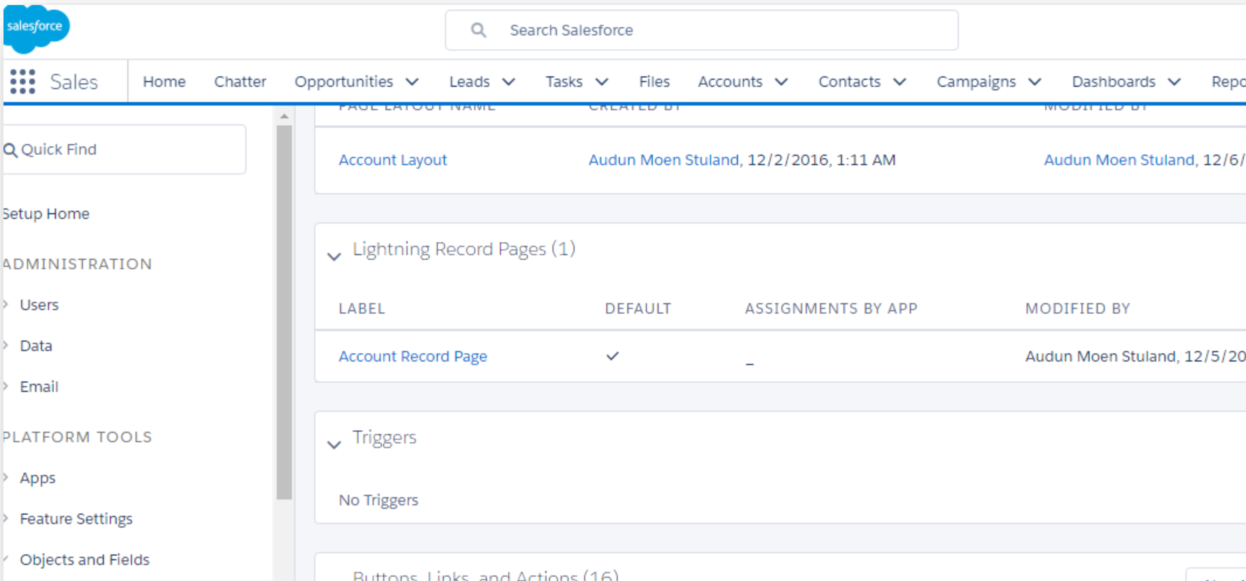


You will need to add the image ID in the logo and background text box. You can find the image ID if you go to Documents and click on the image you want to use. Copy and paste its Id from the Url for use in the next setup step. The Id is highlighted here from the URL in your browser

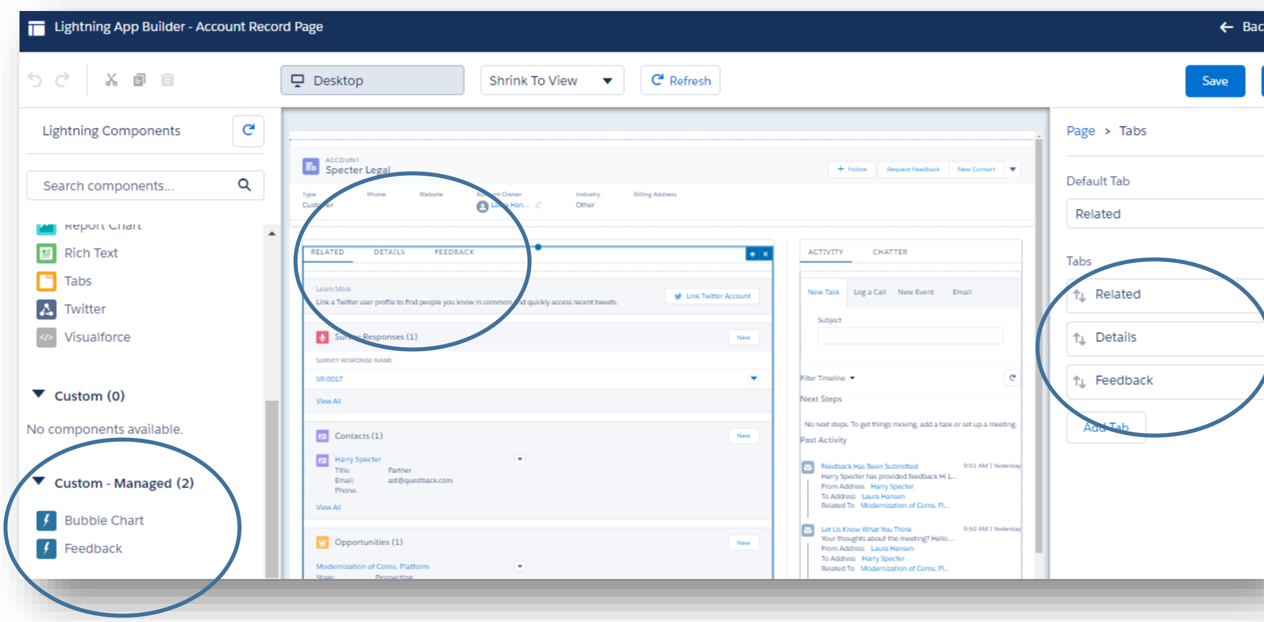
my.salesforce.com/0154100000164tZ

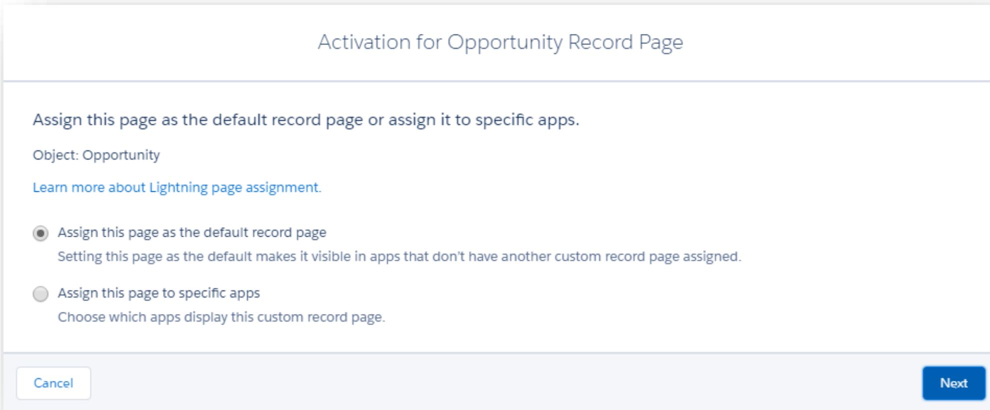
Adding the Feedback Component to Lighting Record Pages

1. While still in the Object Manager on the Account object, scroll down to **Lightning Record Pages**
    - Optionally, you can edit Lightning record pages in the Lightning App Builder or by navigating to a record in Lightning, clicking the setup gear and choosing Edit Page
    -
2. If you already have a Lightning Record Page for the object, click the record page name then click **Edit** to configure its layout. If one does not already exist, click **New** to create a new Lightning Record Page.



3. Once in the Lightning App Builder, find **Feedback** in the Custom-Managed section under Lightning Components in the left column
4. Click and drag the component onto the page where you would like it to be displayed, set the component's attributes in the right column, then click **Save**

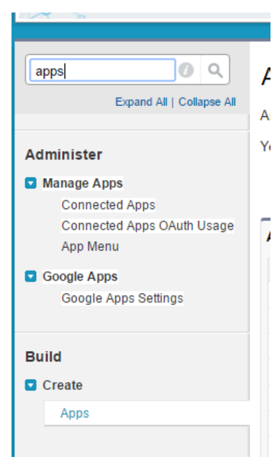




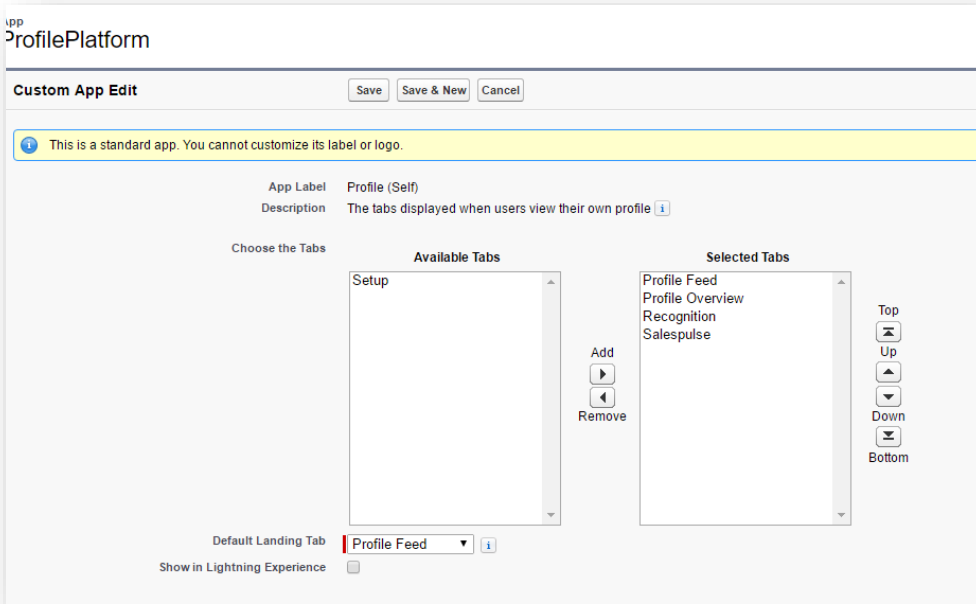
5. Repeat this process for the **Contact, Event, Lead, Opportunity, and User** objects

Adding the Salespulse app to the Salesforce menu

1. From Classic, go to Setup, search **Apps**
2. Under Create, click Apps
3. Next to **Subtab Apps,** click **Edit** next to **Profile (Others)**



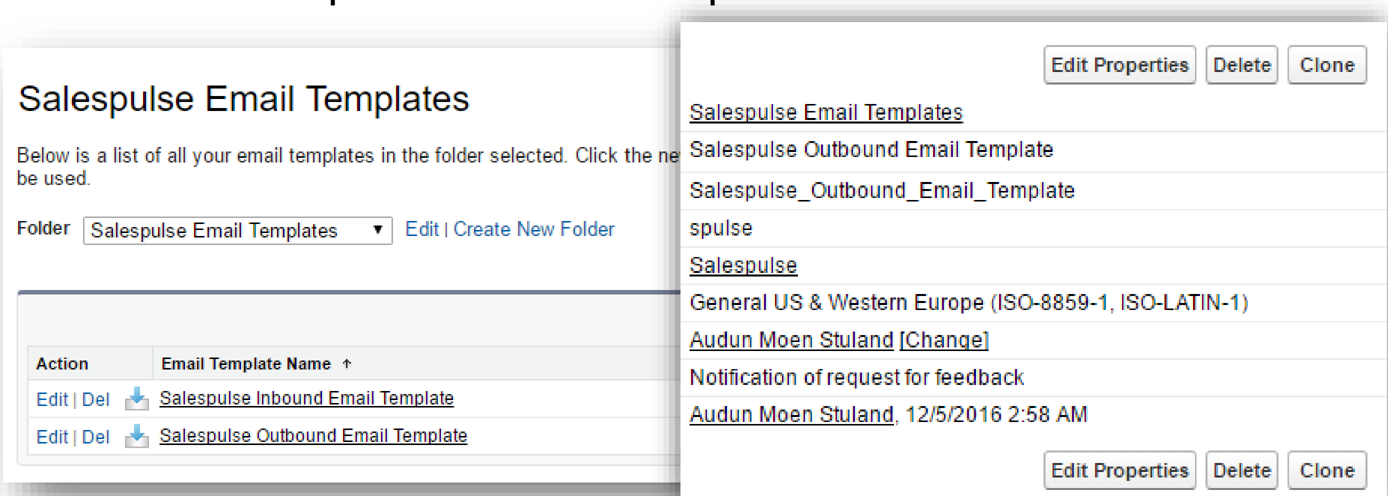
4. Under Available Tabs, select **Salespulse**
5. Click the arrow under **Add** to add the tab, then click **Save**
6. Repeat this process for **Profile (Self)**



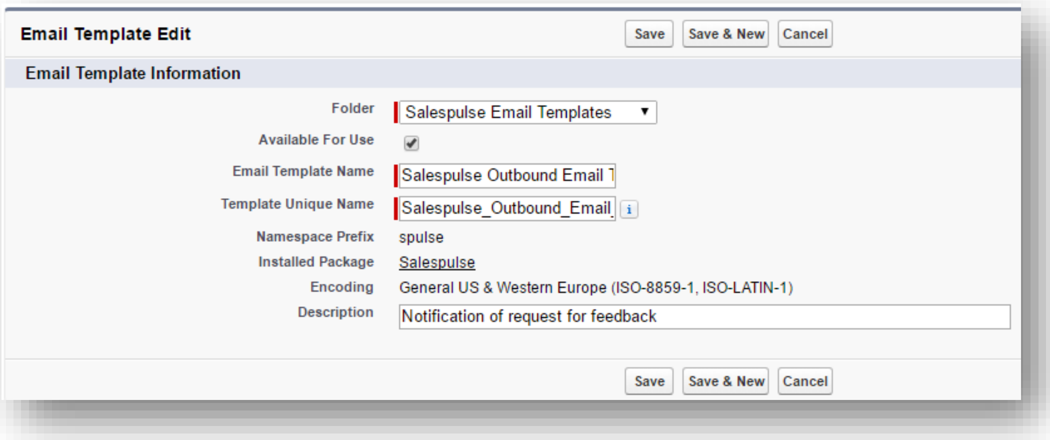
Adding New Email Templates

Email templates can be linked directly to specific survey forms. This enables you to have different email templates for different forms. Follow the steps below to create new email templates that will work with Salespulse.

1. From Salesforce setup, search and select **Email Templates**
2. Select the **Salespulse Outbound Email Template** and click **Clone**

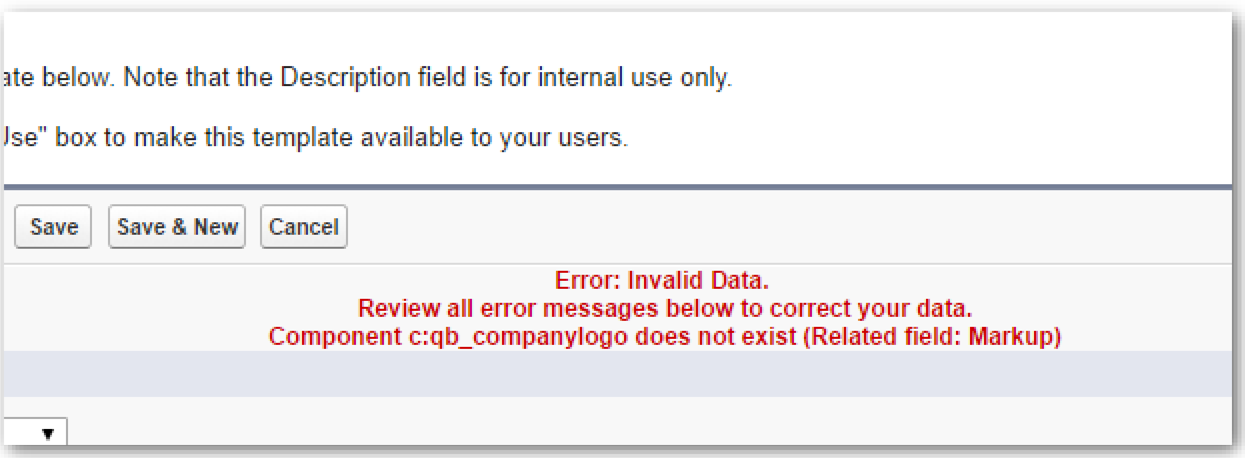


3. After clicking clone, you can change some email template properties. Select a **Folder**, input **Email Template Name** and **Template Unique Name** and click **Save**



4. Now, next to Email Template click **Edit Template**
5. Make any changes you would like to the template and click **Save**

Known Issue:



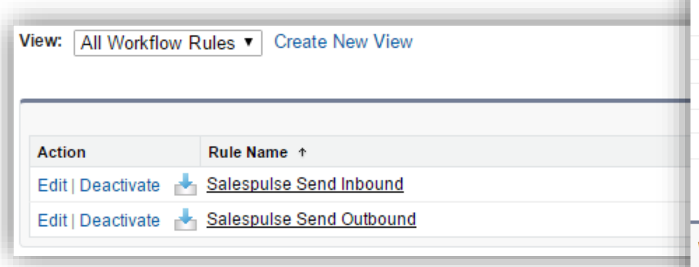
If you encounter the above error, perform the following:

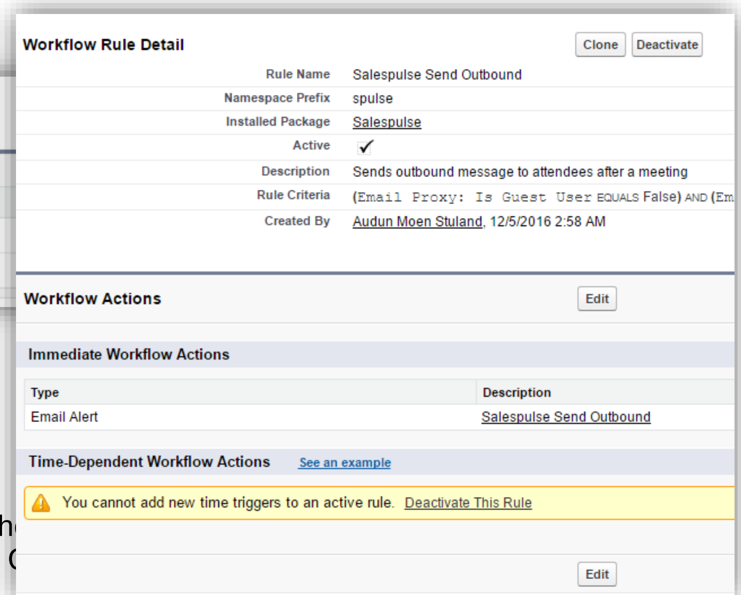
1. Edit the email templates and change all namespaces on the components from “c” to “spulse”.
2. There are 2 you will need to change on the outbound template:
    a. Qb_companyLogo
    b. Qb_surveyLink
3. There are 3 you will need to change on the inbound template:
    a. Qb_companyLogo
    b. Qb_flattenedResponse
    c. Qb_surveyResponseLink

<u>Adding New Workflows for New Email Templates</u>

You will need to create a new Workflow Rule for each email template you wish to send. Follow the steps below to create a new Workflow.

1. From Salesforce setup, search and select **Workflow Rules**
2. Select **Salespulse Send Outbound** and click **Clone**



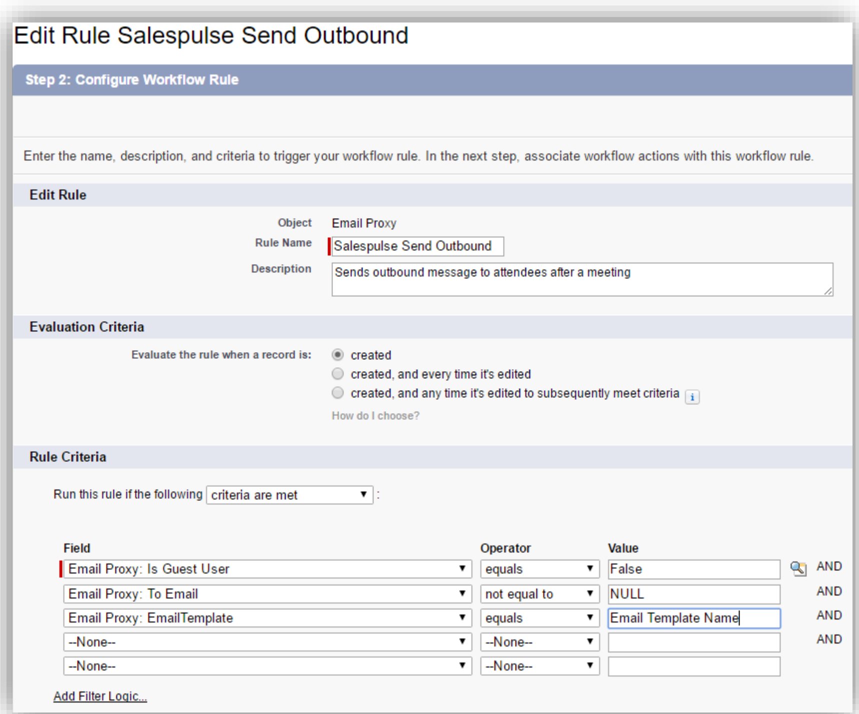


3. After clicking clone, you can change th ‘created’ is selected under Evaluation C defined:

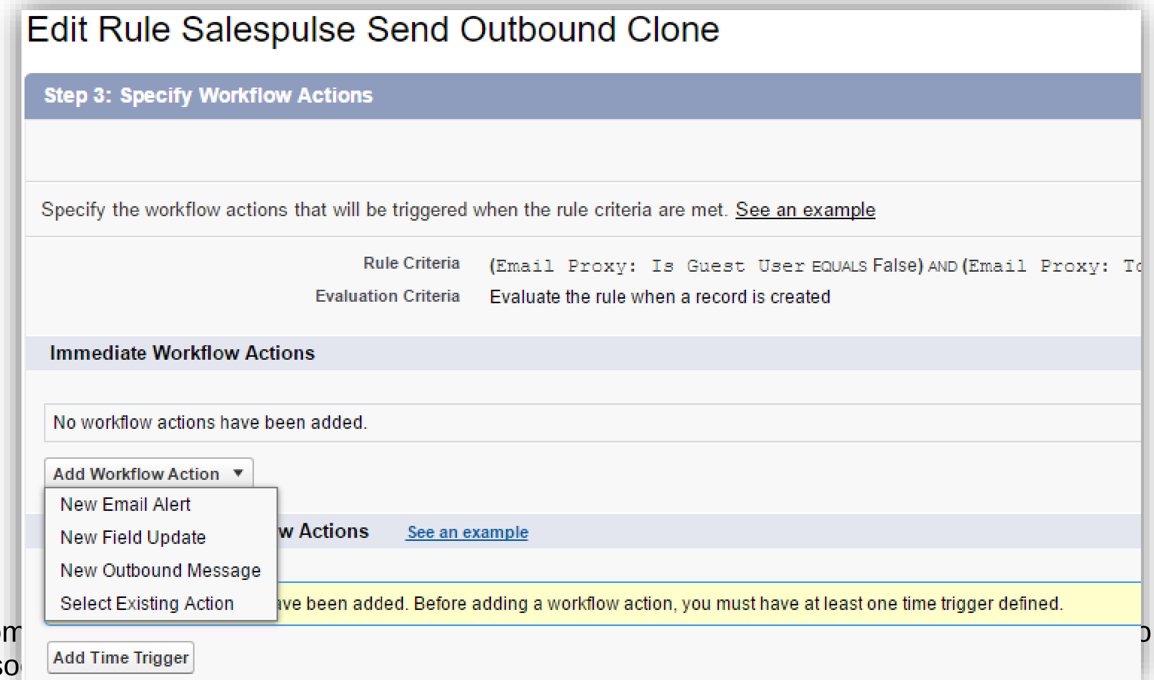
a. Email Proxy: Is Guest User EQUALS False

b. Email Proxy: To Email NOT EQUAL TO NULL

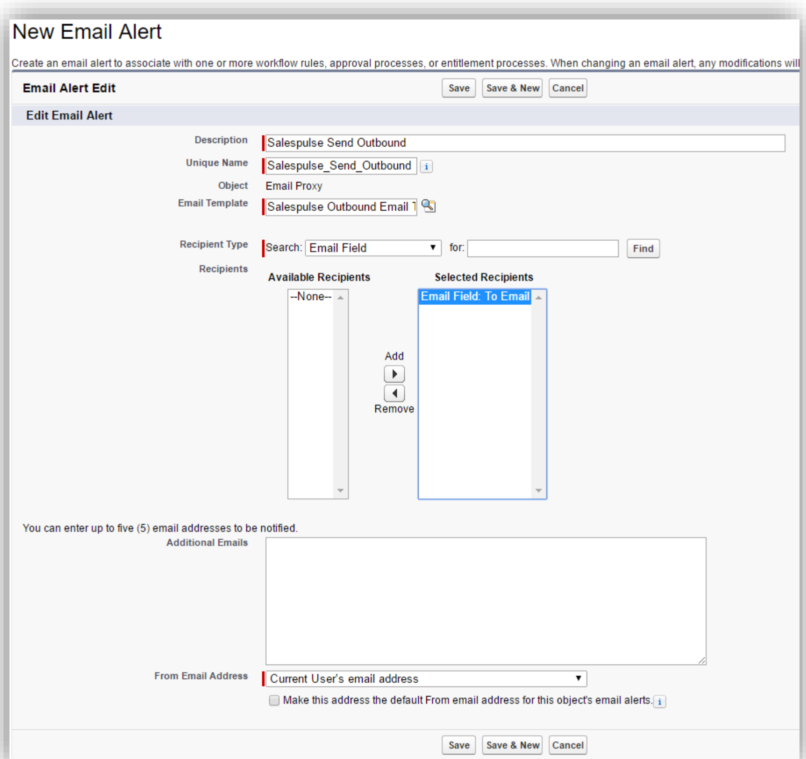
c. Email Proxy: EmailTemplate EQUALS {Insert Email Template Name Here}



After ensuring the accuracy of the Evaluation and Rule Criteria, click **Save & Next**
Under **Immediate Workflow Actions** click **Add Workflow Action** and select **New Email Alert**



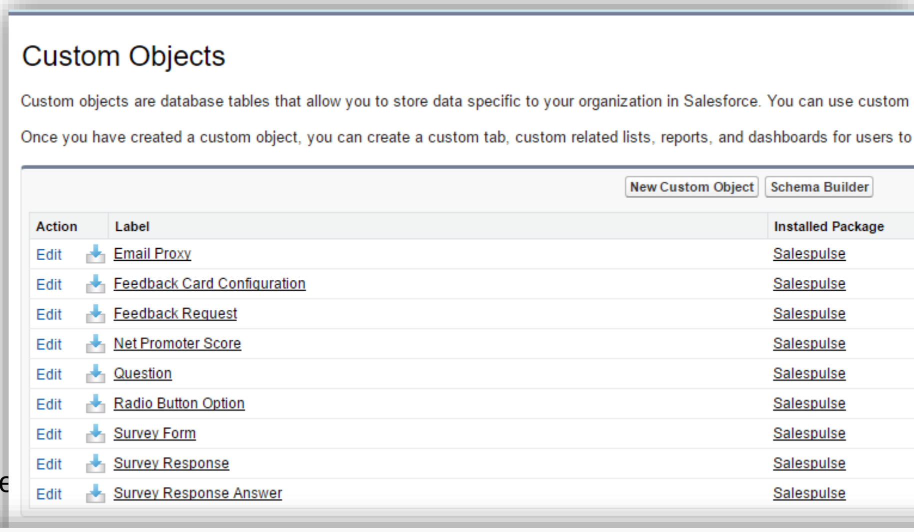
From
asso
From the **Recipient Type** picklist, select **Email Field**
Below **Recipients,** under **Available Recipients**, select **Email Field: To Email** and click **Add**
Optionally, you can also change the **From Email Address**
After completing all of these steps, click **Save**



Adding Email Template Names to Survey Form Picklist

In order to link an email template to a survey form, you must manually add the name of the email template to the picklist values for the Email Template field on the Survey Form object. Follow the steps below to add picklist values to the EmailTemplate__c field.

1. From Salesforce setup, search and select **Object Manager**
2. From Object Manager, select the **Survey Form** object



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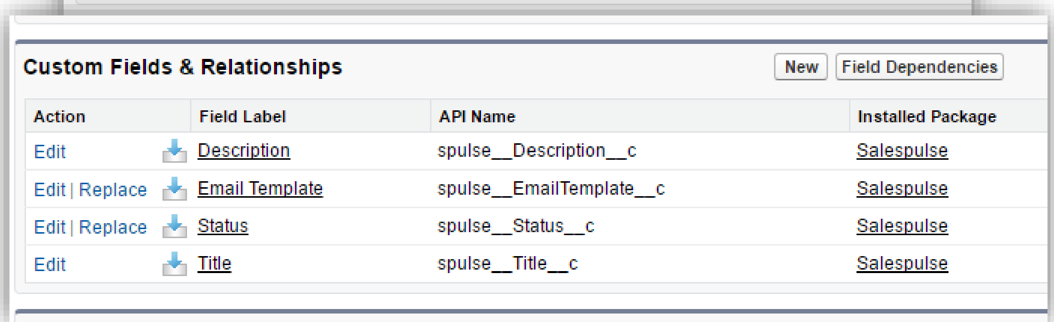
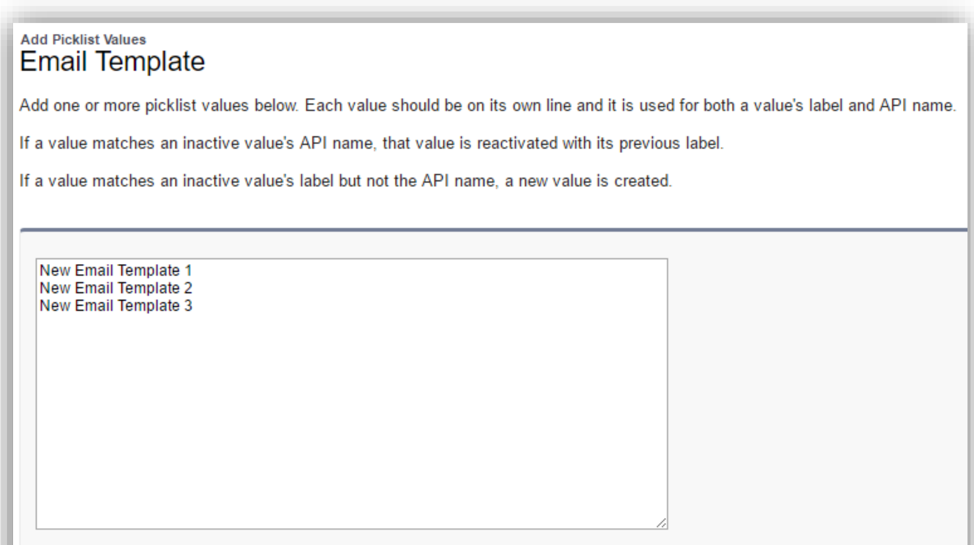


4. Under **Values,** click **New**
5. Enter the **Email Template Name** that you wish to add to the picklist. This must match the name of the email template exactly.

a. If you wish to add multiple email templates at once, enter each email template name on a new line.

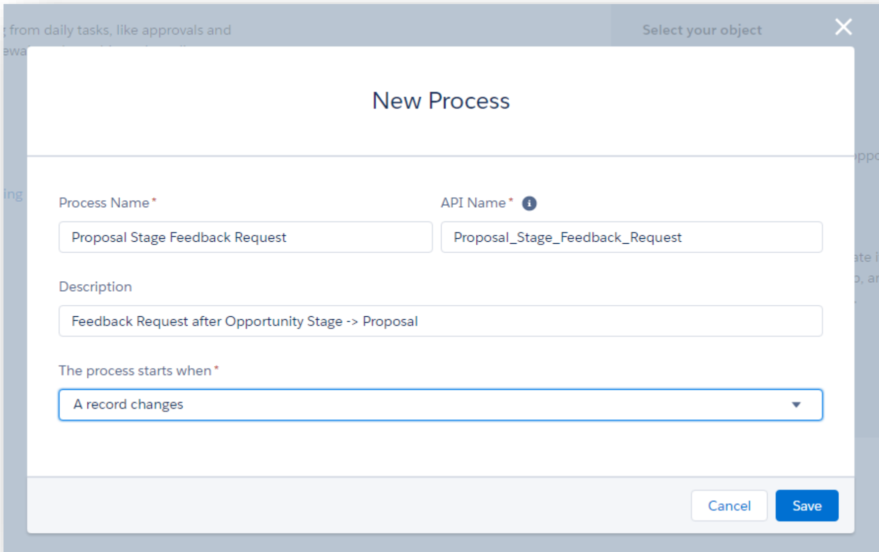
After all email template names you wish to add to the picklist are entered, click **Save**



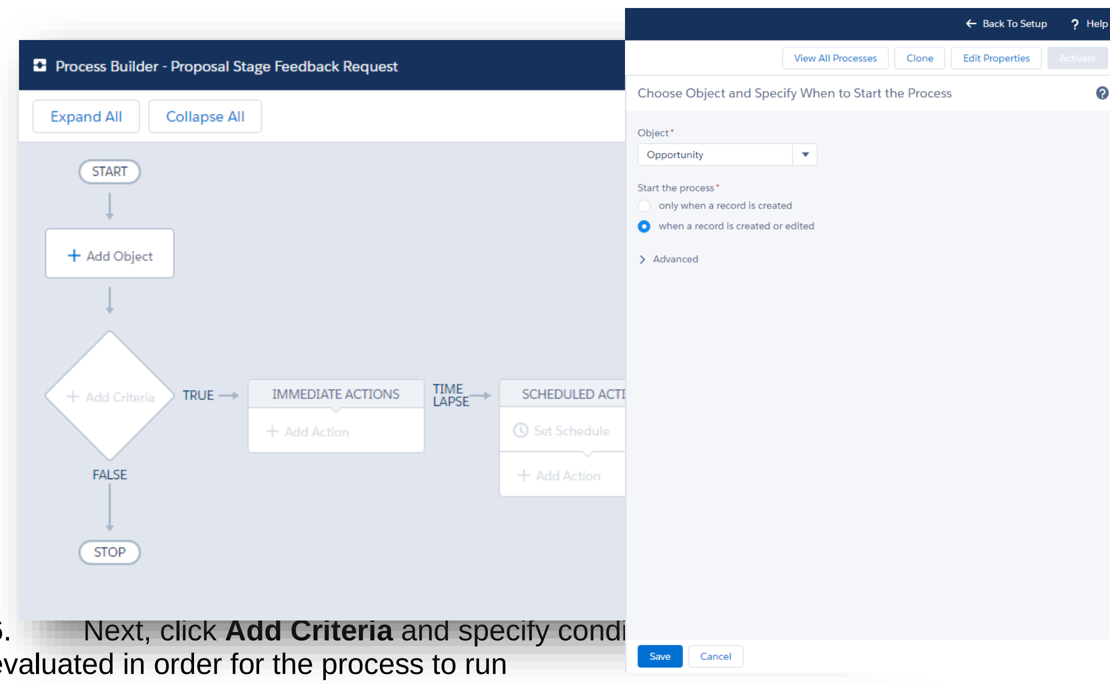
Using the New Invokable Method for Survey Send Automation

In v1, there was an invocable method called Request Feedback that could be used in automating survey sending based on defined criteria. In v2, there is a different invokable method called Request Feedback With Survey. This invocable method should be used for all automated sending through Process Builder.

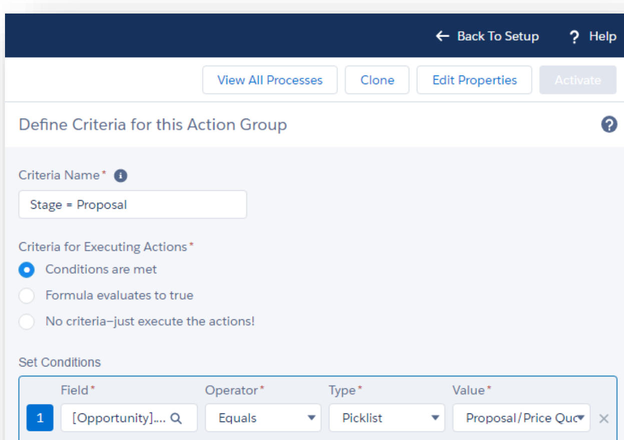
2. From Salesforce Setup, search for and select **Process Builder**
3. Create a new Process by clicking **New** at the top of the page
4. Input the desired Process Name, Api Name, set when when the process starts and click **Save**



5. Next, click **Add Object** and select the object you want the process to run from and click **Save**



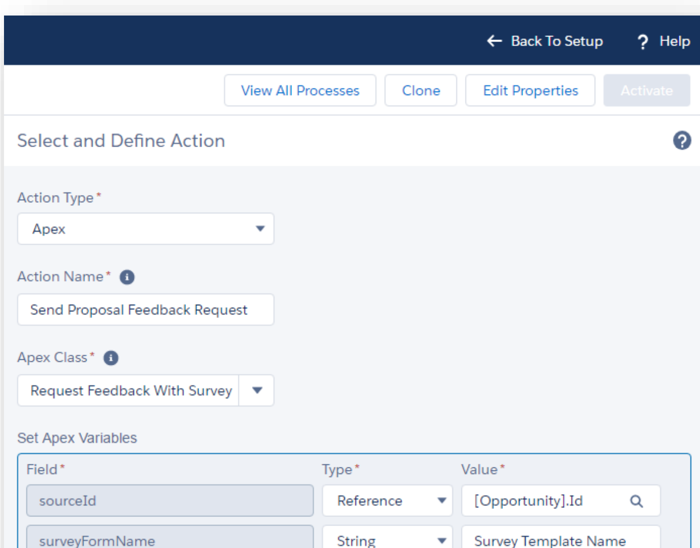
6. Next, click **Add Criteria** and specify condi… at will be evaluated in order for the process to run



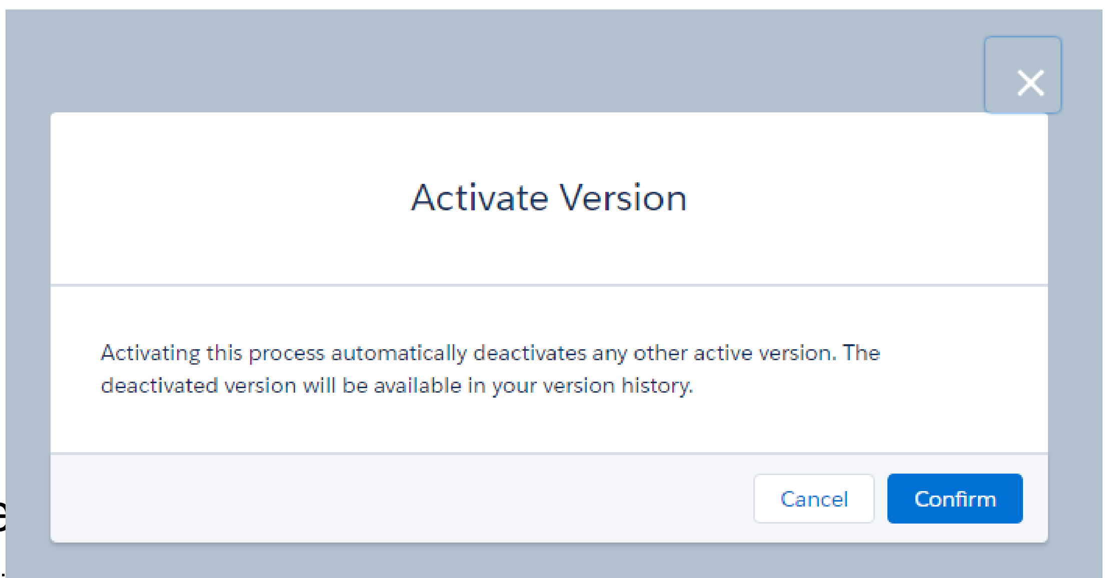
7. Next, click **Add Action** under Immediate Actions to add an action that is performed after your criteria are evaluated

8. For **Action Type,** select **Apex**, input a name for the action, and then choose **Request Feedback With Survey** from the **Apex Class** picklist

9. Next, you will need to specify the apex variable values
    - Select Reference from the Type picklist next to sourceId and select the Id of the object the process is running from (i.e. if the process is running from the Account object, the sourceId value should be [Account].Id)
    - Select String from the Type picklist next to surveyFormName and input the name of the survey form you wish to send with this process



10. After all information is entered, click **Save** and then Activate the process by clicking **Activate** in the top right corner of the page



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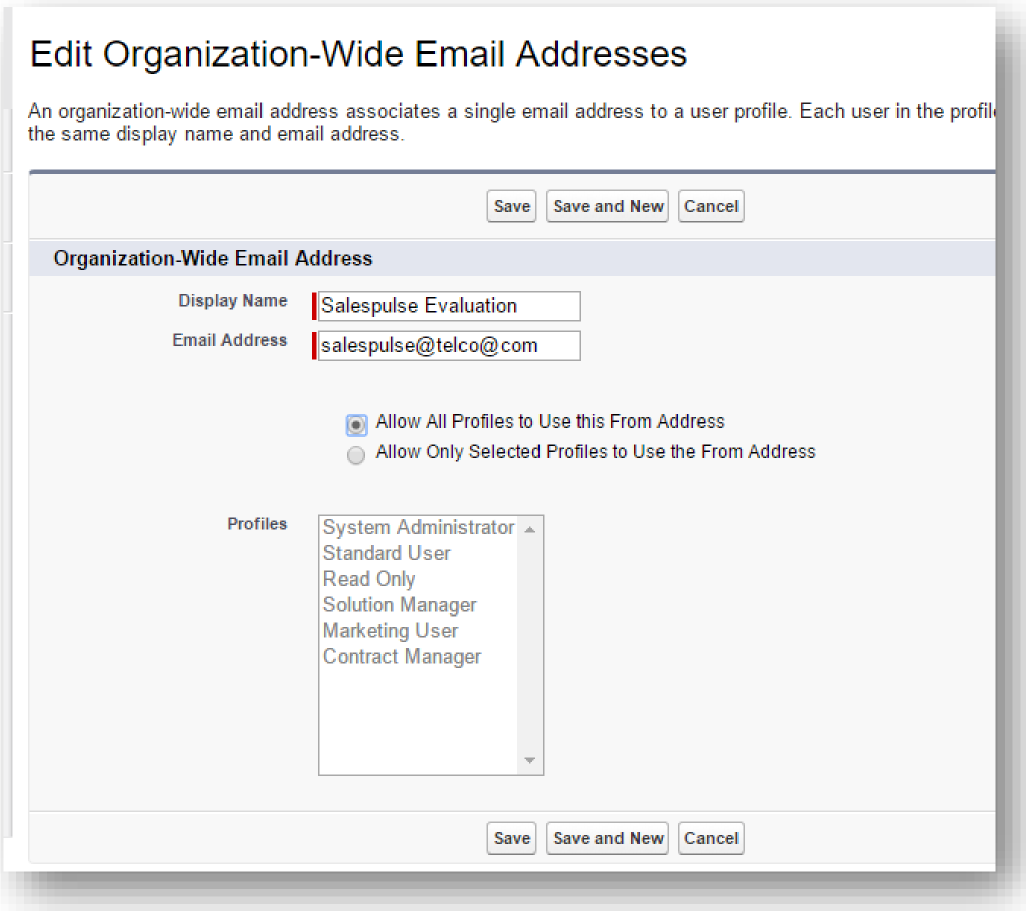
Setting up the Organization-Wide Email Address will allow you to change the source of the inbound email that a sales representative receives after feedback has been submitted. By default, it will come from the site guest user. If you want to change this, you will need to perform the next two setup steps.

1. While in Classic, go to Setup and search **Organization-Wide Addresses**
2. Next to **Organization-Wide Email Addresses** click **Add**

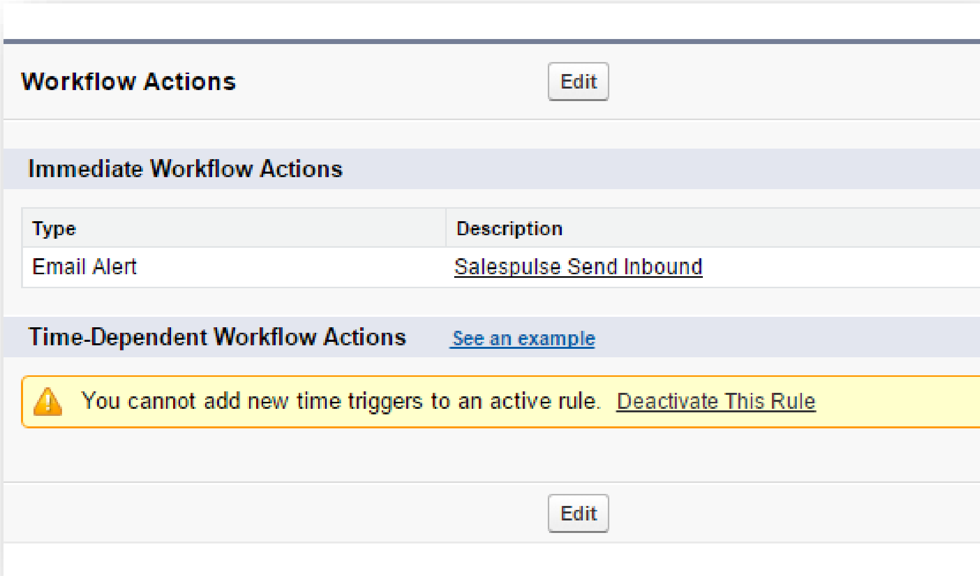
3. In the **Display Name** field, enter the display name that you want to show in the email From field
4. In the **Email Address** field, enter the email address you want all inbound emails to come from
5. Underneath the Email Address field, select **Allow All Profiles to Use this From Address** and click **Save**

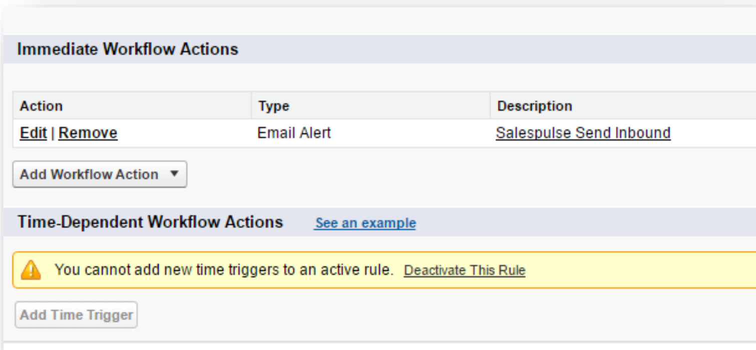


6. At this time, Salesforce will send an email to the address entered. Click the link in the email to verify the address. This must be done before you can complete the next setup step.

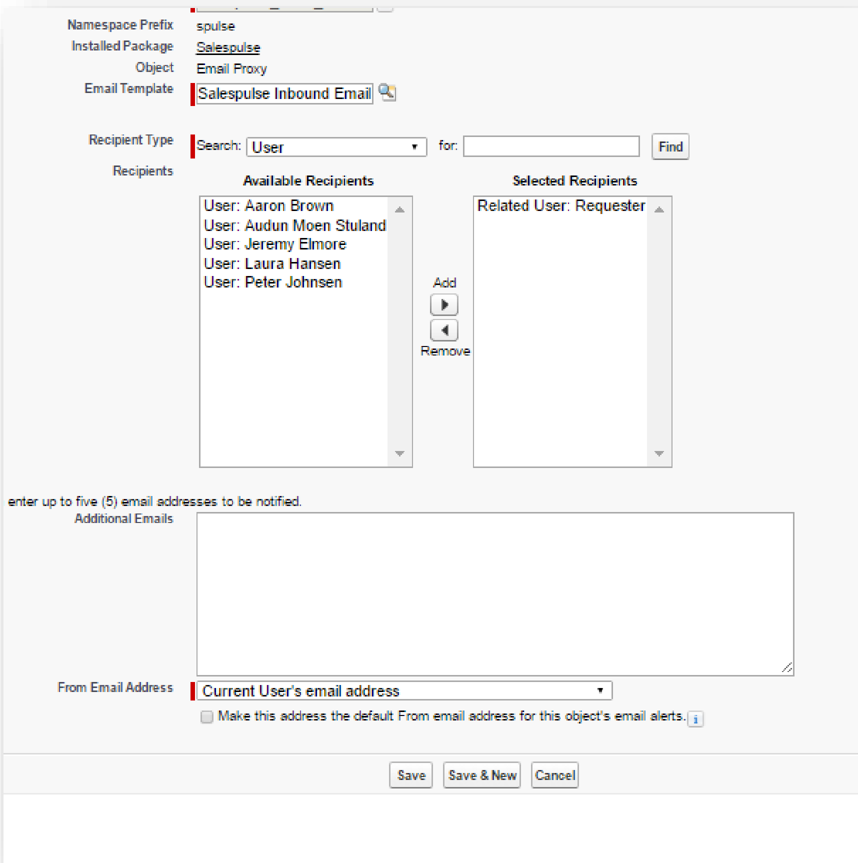
Editing the Salespulse Inbound Email Workflow

1. From Salesforce Setup, search **Workflow Rules**
2. Click **Salespulse Send Inbound**
3. In Workflow Actions under Immediate Workflow Actions click **Salespulse Send Inbound**
4. At the top of the page, Click **Edit**

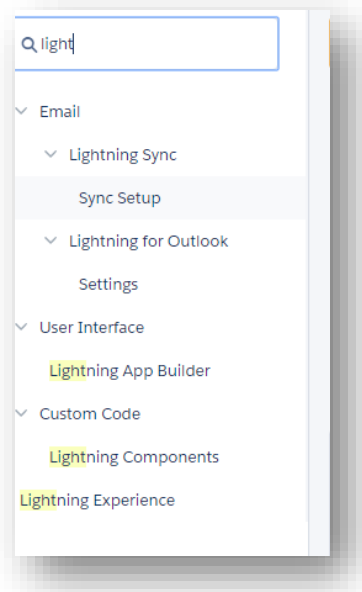




5. At the bottom of the page in the **From Email Address** picklist, choose the Organization-Wide Email Address you previously set up and click **Save**

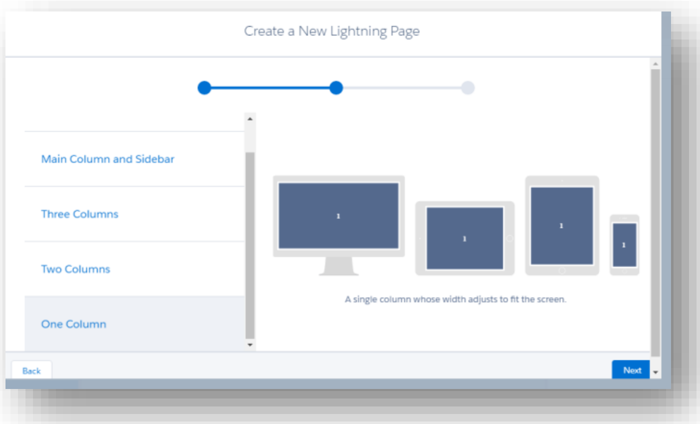

Namespace Prefix
spulse
Installed Package
Salespulse
Object
Email Proxy
Email Template
Salespulse Inbound Email
Recipient Type
Search:
User
for:
Find
Recipients
Available Recipients
Selected Recipients
User: Aaron Brown
User: Audun Moen Stuland
User: Jeremy Elmore
User: Laura Hansen
User: Peter Johnsen
Related User: Requester
Add
Remove
enter up to five (5) email addresses to be notified.
Additional Emails
From Email Address
Current User's email address
Make this address the default From email address for this object's email alerts.
Save
Save & New
Cancel

Adding the Bubble Chart Component to Lightning App or Record Page

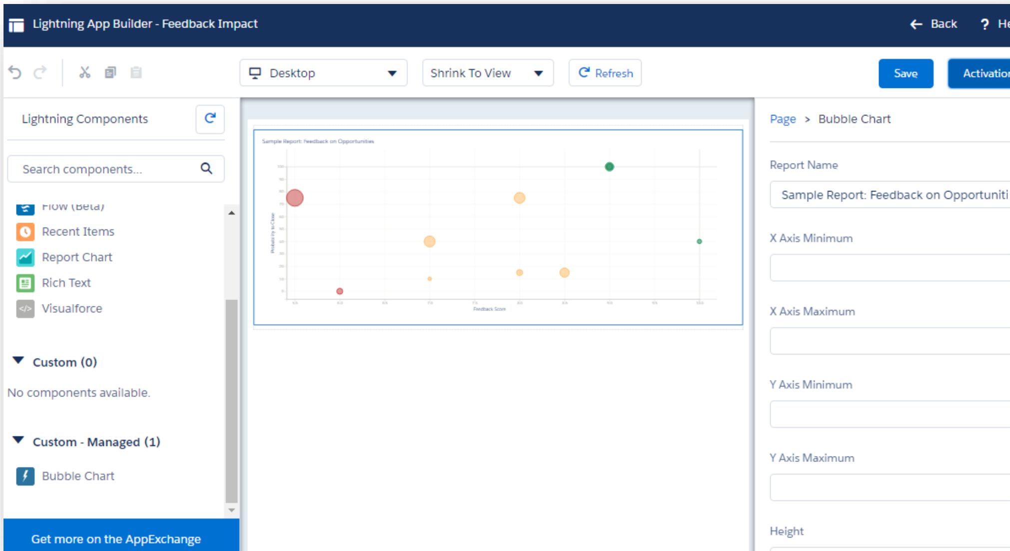


There is a Custom Lightning Component included in the package called Bubble Chart. This component can render report results as a customizable bubble chart. You can make a lightning app through the Lightning App Builder that houses this component and other report charts, or you can add it to an existing lightning record page. The steps below will describe the process of creating a Lightning App.

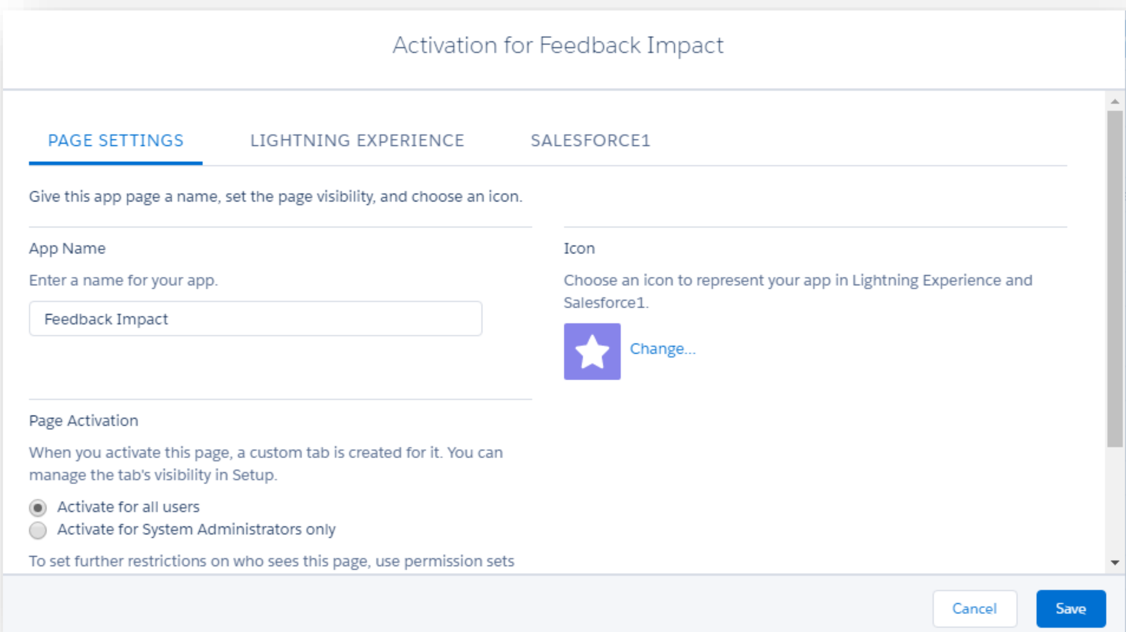
1. From Salesforce Setup, search **Lightning App Builder**
2. Next to Lightning Pages click **New**
3. Choose **App Page,** any layout, add a label for the page and click **Finish**



4. Find **Bubble Chart** in the Custom-Managed section under Lightning Components in the left column and drag it onto the page
5. Once it is added to the page, you will notice an error that says “Please enter in a report name”
6. Click on the component and you will see various attributes in the right column
7. Enter the name of the report you want the bubble chart to render in the **Report Name** field. A sample report you can use is **Sample Report: Feedback on Opportunities**
8. You can also specify the x and y axis maximum and minimum values as well as the height of the chart. However, these fields are not required for the bubble chart to function properly.



9. After you are finished editing the bubble chart, you can add other charts to the app page by dragging the **Report Chart** component onto the page and setting its attributes
10. Once you are finished editing the page, click **Save**



Implementing Process Builder for Reporting

As an optional setup step, you can create a process that will capture pertinent information and store it in a custom field on the Net Promoter Score object for reporting. This process is outlined below.

1. From Salesforce setup, search **Object Manager** and click on **Net Promoter Score**
2. Next to **Fields & Relationships**, click **New**
3. Choose the field data type and click **Next**
4. Enter the custom field details and click **Next**
5. Set the profiles that have access to the field, click **Next** and then **Save**
6. From Salesforce Setup, search **Process Builder**
7. Create a new process that will populate the custom field with a value whenever a Net Promoter Score record is created

Notes

- To utilize the Bubble Chart component, reports must be in the following format:
    - Report format: Summary
    - Grouping: Values determine number of bubbles
    - 1st column: Values determine bubble size
    - 2nd column: Y-axis values
    - Last Column: X-axis values (must be a formula)
    - Any columns between the 2nd and last will be displayed in the tooltip on the chart
- Packaged reports in the Salespulse Sample Reports folder can be used to create a dashboard. To do this, go to the Dashboard object, create a new dashboard, and use these sample reports as source reports for the charts on the dashboard.
- Question labels are used for report filtering in most Salespulse Sample Reports. If you change any question labels, you must also change the report filter.