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SALESPULSE

USER GUIDE

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

If you run into any problems please contact us:

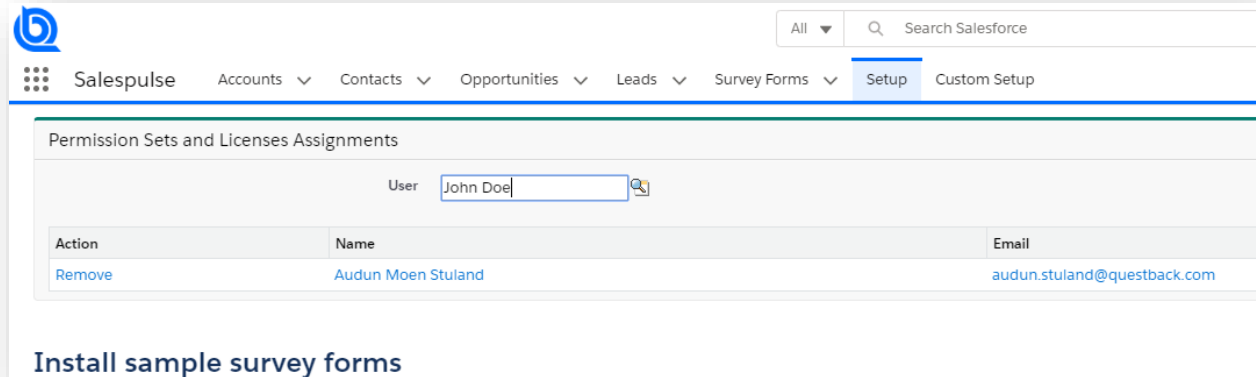
email: support@qbsalespulse.com, phone: (+47) 412 12 820.

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.

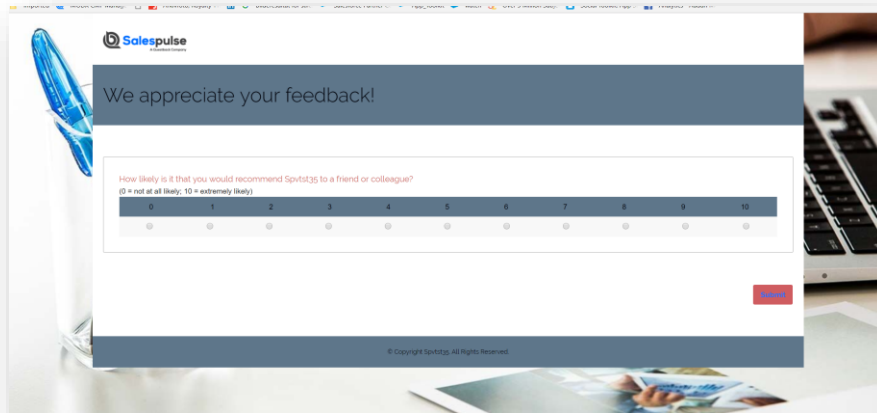
This needs to be added by navigating to the desired Profile-> Edit and then go to Administrative settings and then check the **“View all custom settings”** checkbox for the profiles that you want to give Salespulse to.

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**

If 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 different logos and background images for each survey you can do that on the survey template.

The screenshot shows the 'Custom Setup' page in the Salespulse application. The top navigation bar includes 'Home', 'Accounts', 'Contacts', 'Opportunities', 'Leads', 'Survey Forms', 'Setup', and 'Custom Setup'. The left sidebar has a 'Create New...' button and a 'Recent Items' list. The main content area has four sections: 'Primary Brand 1' with a text field containing 'SE768A', 'Secondary Brand 1' with a text field containing 'CFSC60', 'Primary Brand 2' with a text field containing '00020A', and 'Secondary Brand 2' with a text field containing '1273FF'. Below these are two dropdown menus: 'Company Logo' (selected: Salespulse App Logo) and 'Background Image' (selected: Salespulse_background). A 'Submit' button is at the bottom.

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.

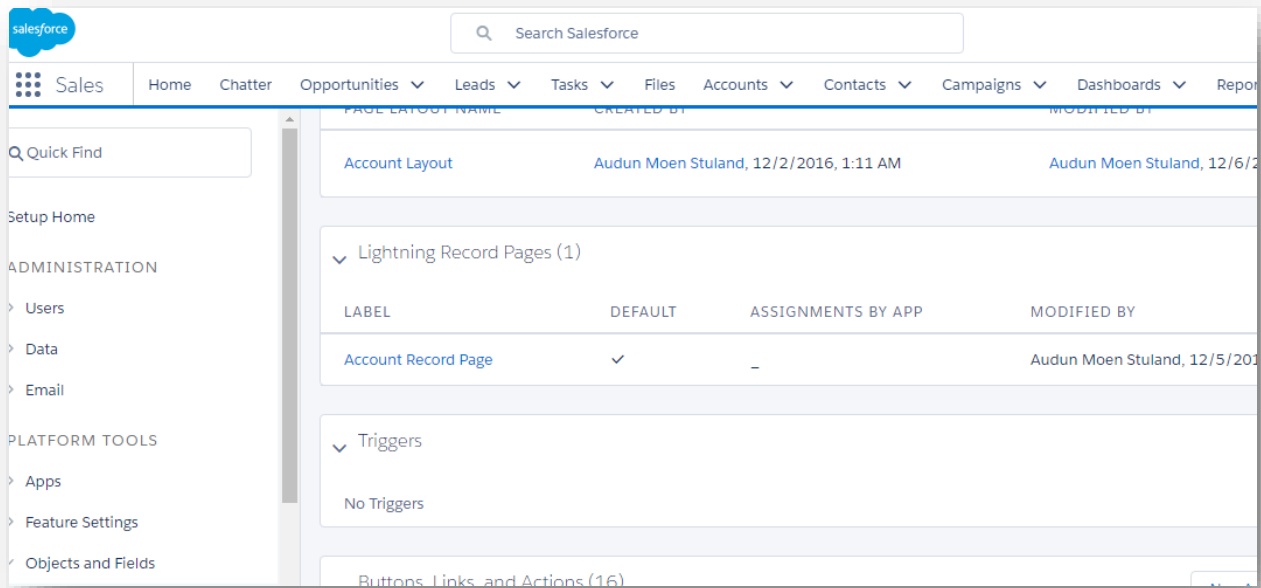
The screenshot shows the 'Survey Form' page for 'Sales meeting evaluation - Challenger'. The top navigation bar includes 'Salespulse', 'Accounts', 'Contacts', 'Opportunities', 'Leads', 'Survey Forms', 'Setup', and 'Custom Setup'. The left sidebar has a 'Survey Form' icon. The main content area has a 'DETAILS' tab. The details section includes the following fields: 'Name' (Sales meeting evaluation - Challenger), 'Description' (Thank you for meeting with us! We value your feedback and we will use it to better understand your needs and improve our service to you in the future.), 'Title' (We appreciate your feedback!), 'Status' (Active), 'Owner' (Audun Moen Stuland), 'Email Template' (Salespulse Outbound Email Template), 'Survey Logo' (with a plus icon), 'Survey Background Image' (with a plus icon), 'Font Size', 'Created By' (Audun Moen Stuland, 1/5/2017 3:48 PM), and 'Last Modified By' (Audun Moen Stuland, 11/23/2017 1).

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

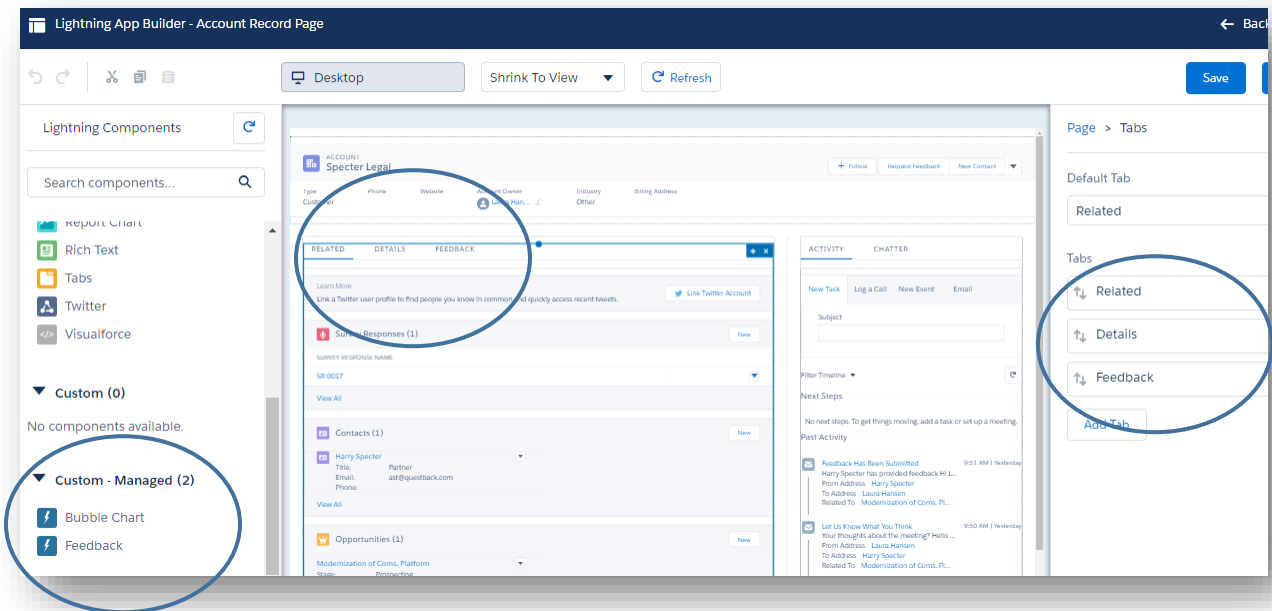
my.salesforce.com/0154100000164tZ

Adding the Feedback Component to Lightning 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**



Activation for Opportunity Record Page

Assign this page as the default record page or assign it to specific apps.

Object: Opportunity

[Learn more about Lightning page assignment.](#)

☒ Assign this page as the default record page
Setting this page as the default makes it visible in apps that don't have another custom record page assigned.

☐ Assign this page to specific apps
Choose which apps display this custom record page.

[Cancel](#) [Next](#)

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

Adding the Salespulse app to the Salesforce menu

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

Subtab Apps

Action	App Label	Description
Edit	Profile (Others)	The tabs displayed when users view s
Edit	Profile (Self)	The tabs displayed when users view t

Connected Apps [New](#)

No Apps found.

apps

[Expand All](#) | [Collapse All](#)

Administer

- ☒ Manage Apps
 - Connected Apps
 - Connected Apps OAuth Usage
 - App Menu
- ☒ Google Apps
 - Google Apps Settings

Build

- ☒ Create
 - [Apps](#)

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

ProfilePlatform

Custom App Edit [Save] [Save & New] [Cancel]

This is a standard app. You cannot customize its label or logo.

App Label: Profile (Self)
Description: The tabs displayed when users view their own profile

Choose the Tabs

Available Tabs
Setup

Selected Tabs
Profile Feed
Profile Overview
Recognition
Salespulse

[Add] [Remove]

Default Landing Tab: Profile Feed
Show in Lightning Experience: ☐

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**

Salespulse Email Templates

Below is a list of all your email templates in the folder selected. Click the name to be used.

Folder: Salespulse Email Templates [Edit | Create New Folder]

Action	Email Template Name ↑
[Edit] [Del]	Salespulse Inbound Email Template
[Edit] [Del]	Salespulse Outbound Email Template

Salespulse Email Templates [Edit Properties] [Delete] [Clone]

Salespulse Outbound Email Template

Salespulse_Outbound_Email_Template

spulse

Salespulse

General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

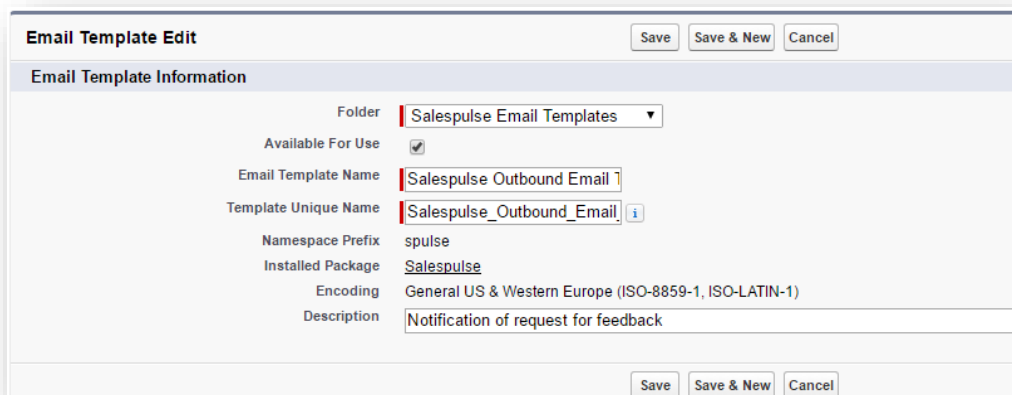
Audun Moen Stuland [Change]

Notification of request for feedback

Audun Moen Stuland, 12/5/2016 2:58 AM

[Edit Properties] [Delete] [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**



Email Template Edit [Save] [Save & New] [Cancel]

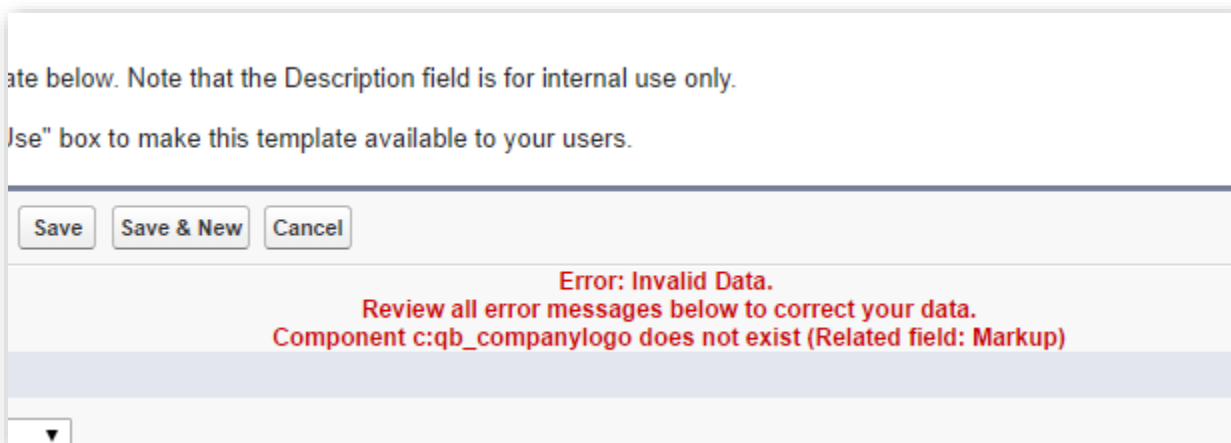
Email Template Information

Folder	Salespulse Email Templates ▼
Available For Use	☒
Email Template Name	Salespulse Outbound Email
Template Unique Name	Salespulse_Outbound_Email ⓘ
Namespace Prefix	spulse
Installed Package	Salespulse
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
Description	Notification of request for feedback

[Save] [Save & New] [Cancel]

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

Known Issue:



ate below. Note that the Description field is for internal use only.

Use" box to make this template available to your users.

[Save] [Save & New] [Cancel]

Error: Invalid Data.
Review all error messages below to correct your data.
Component c:qb_companylogo does not exist (Related field: Markup)

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

Adding New Workflows for New Email Templates

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**

The screenshot shows the Salesforce Workflow Rules interface. On the left, a list of rules is displayed with columns for Action and Rule Name. The 'Salespulse Send Outbound' rule is highlighted. On the right, the 'Workflow Rule Detail' panel is open, showing the rule's configuration. The rule is named 'Salespulse Send Outbound', has a namespace prefix of 'spulse', and is installed from the 'Salespulse' package. It is currently active. The description is 'Sends outbound message to attendees after a meeting'. The rule criteria are '(Email Proxy: Is Guest User EQUALS False) AND (Email Proxy: To Email NOT EQUAL TO NULL)'. The rule was created by Audun Moen Stuland on 12/5/2016 at 2:58 AM. Below the details, the 'Workflow Actions' section shows an immediate action of type 'Email Alert' with the description 'Salespulse Send Outbound'. A warning message states: 'You cannot add new time triggers to an active rule. Deactivate This Rule'.

3. After clicking clone, you can change the rule name. The rule 'created' is selected under Evaluation Criteria. Define the rule criteria as follows:
 - 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}

The screenshot shows the 'Edit Rule Salespulse Send Outbound' configuration page. The page is titled 'Step 2: Configure Workflow Rule'. It prompts the user to enter the name, description, and criteria to trigger the workflow rule. The 'Edit Rule' section shows the rule name as 'Salespulse Send Outbound' and the description as 'Sends outbound message to attendees after a meeting'. The 'Evaluation Criteria' section shows the rule is evaluated when a record is 'created'. The 'Rule Criteria' section shows the rule is triggered when the following criteria are met: 'Email Proxy: Is Guest User' equals 'False', 'Email Proxy: To Email' is not equal to 'NULL', and 'Email Proxy: EmailTemplate' equals 'Email Template Name'. The criteria are combined using 'AND' logic. There is a link to 'Add Filter Logic...' at the bottom.

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**

Edit Rule Salespulse Send Outbound Clone

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria (Email Proxy: Is Guest User EQUALS False) AND (Email Proxy: To
Evaluation Criteria Evaluate the rule when a record is created

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

- New Email Alert
- New Field Update
- New Outbound Message
- Select Existing Action

[See an example](#)

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger

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**

New Email Alert

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will

Email Alert Edit Save Save & New Cancel

Edit Email Alert

Description Salespulse Send Outbound

Unique Name Salespulse_Send_Outbound ⓘ

Object Email Proxy

Email Template Salespulse Outbound Email ⓘ

Recipient Type Search: Email Field for: Find

Recipients

Available Recipients --None--

Selected Recipients Email Field: To Email

Add Remove

You can 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 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

3. Under **Custom Objects**

Action	Label	Installed Package
Edit	Email Proxy	Salespulse
Edit	Feedback Card Configuration	Salespulse
Edit	Feedback Request	Salespulse
Edit	Net Promoter Score	Salespulse
Edit	Question	Salespulse
Edit	Radio Button Option	Salespulse
Edit	Survey Form	Salespulse
Edit	Survey Response	Salespulse
Edit	Survey Response Answer	Salespulse

4. Under **Custom Fields & Relationships**

Action	Field Label	API Name	Installed Package
Edit	Description	spulse__Description__c	Salespulse
Edit Replace	Email Template	spulse__EmailTemplate__c	Salespulse
Edit Replace	Status	spulse__Status__c	Salespulse
Edit	Title	spulse__Title__c	Salespulse

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**

Add Picklist Values

Email Template

Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.

If a value matches an inactive value's API name, that value is reactivated with its previous label.

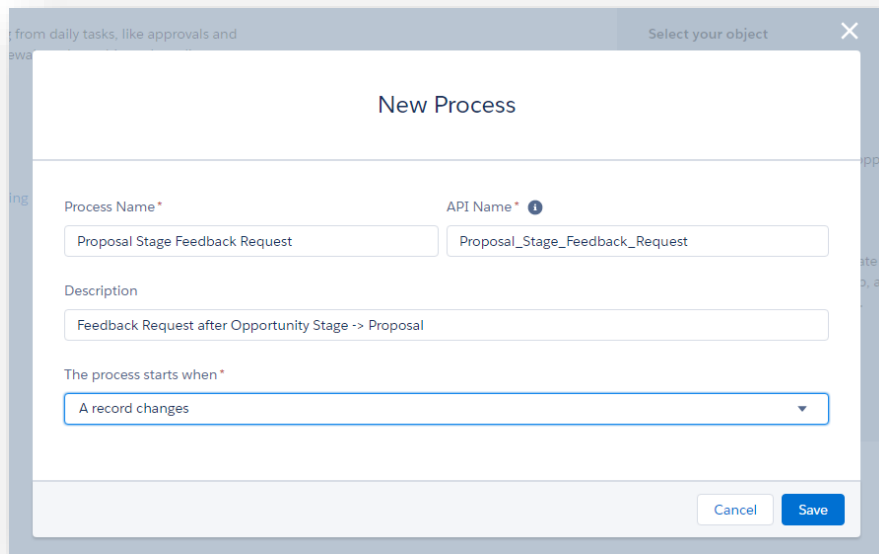
If a value matches an inactive value's label but not the API name, a new value is created.

New Email Template 1
New Email Template 2
New Email Template 3

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 invocable 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**



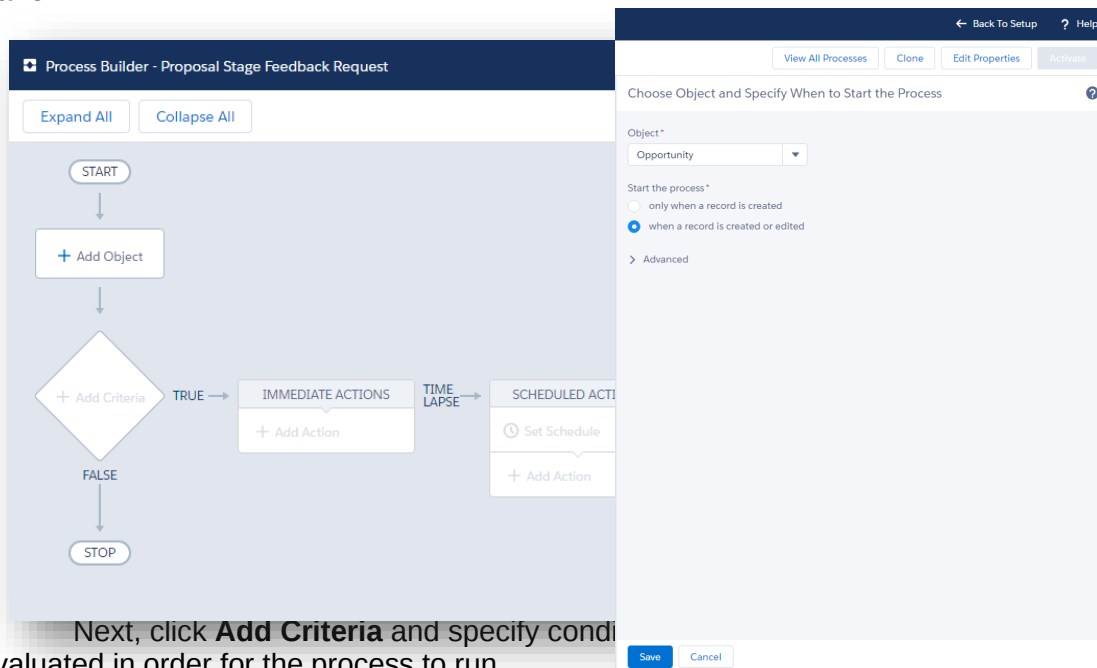
New Process

Process Name * API Name *

Description

The process starts when *

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



Process Builder - Proposal Stage Feedback Request

Expand All Collapse All

START

+ Add Object

+ Add Criteria

TRUE → IMMEDIATE ACTIONS

TIME LAPSE → SCHEDULED ACTIONS

FALSE → STOP

Choose Object and Specify When to Start the Process

Object *

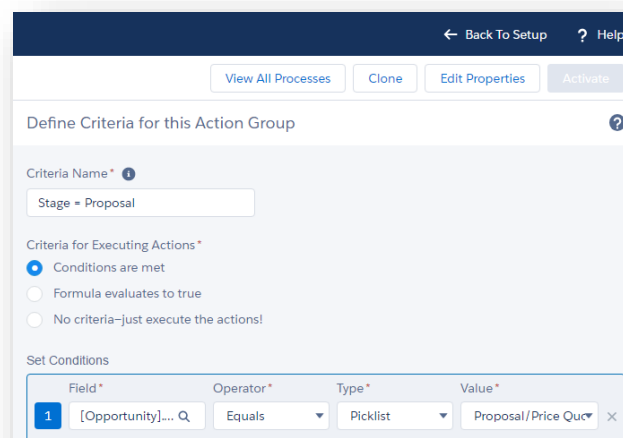
Start the process *

☐ only when a record is created

☒ when a record is created or edited

> Advanced

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



Define Criteria for this Action Group

Criteria Name *

Criteria for Executing Actions *

☒ Conditions are met

☐ Formula evaluates to true

☐ No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *
1	[Opportunity]... Q	Equals	Picklist	Proposal/Price Qu

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

← Back To Setup ? Help

View All Processes Clone Edit Properties Activate

Select and Define Action ?

Action Type *
Apex

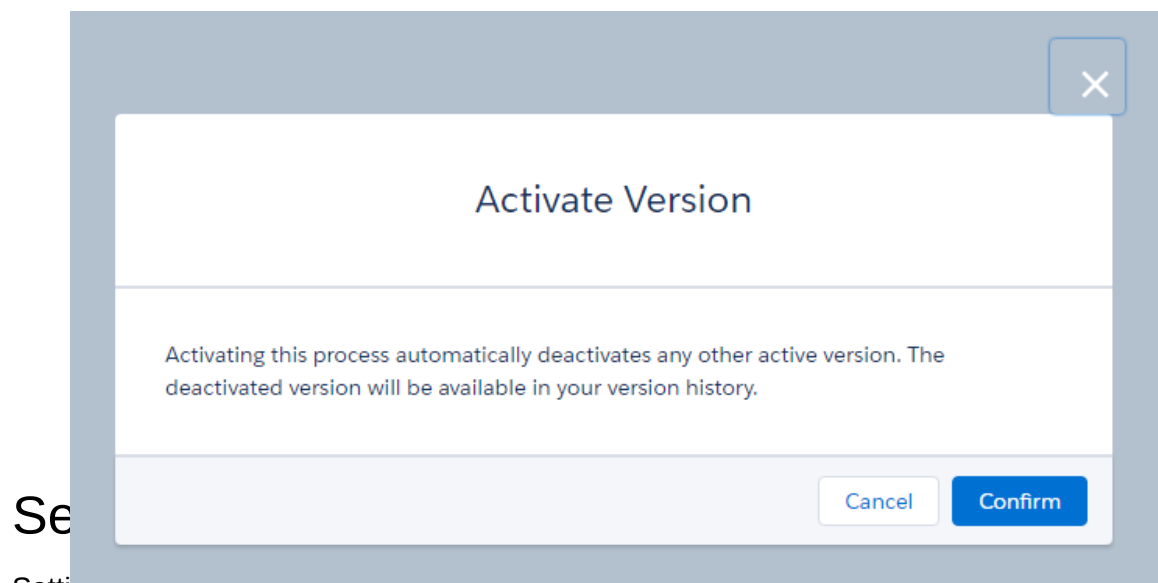
Action Name * ⓘ
Send Proposal Feedback Request

Apex Class * ⓘ
Request Feedback With Survey

Set Apex Variables

Field *	Type *	Value *
sourceId	Reference	[Opportunity].Id
surveyFormName	String	Survey Template Name

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



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**

Edit Organization-Wide Email Addresses

An organization-wide email address associates a single email address to a user profile. Each user in the profile has the same display name and email address.

Save Save and New Cancel

Organization-Wide Email Address

Display Name Salespulse Evaluation

Email Address salespulse@telco@com

☒ Allow All Profiles to Use this From Address
☐ Allow Only Selected Profiles to Use the From Address

Profiles

- System Administrator
- Standard User
- Read Only
- Solution Manager
- Marketing User
- Contract Manager

Save Save and New Cancel

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**

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Email Alert	Salespulse Send Inbound

Time-Dependent Workflow Actions [See an example](#)

 You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

Edit

Immediate Workflow Actions

Action	Type	Description
Edit Remove	Email Alert	Salespulse Send Inbound

Add Workflow Action ▾

Time-Dependent Workflow Actions [See an example](#)

 You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

Add Time Trigger

- 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

User: Aaron Brown
User: Audun Moen Stuland
User: Jeremy Elmore
User: Laura Hansen
User: Peter Johnsen

Add
Remove

Selected Recipients

Related User: Requester

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

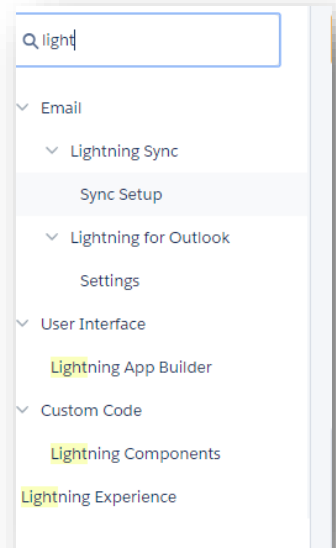
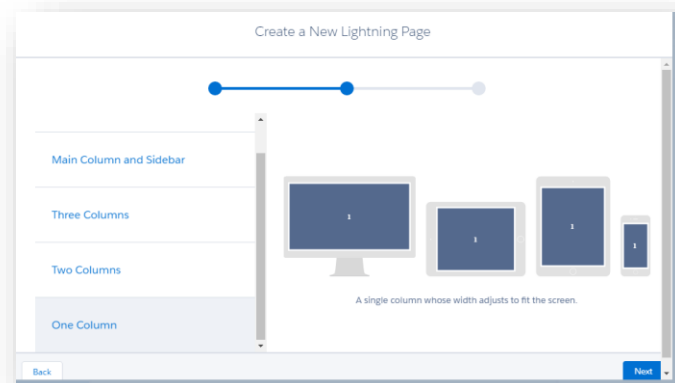
Save & New

Cancel

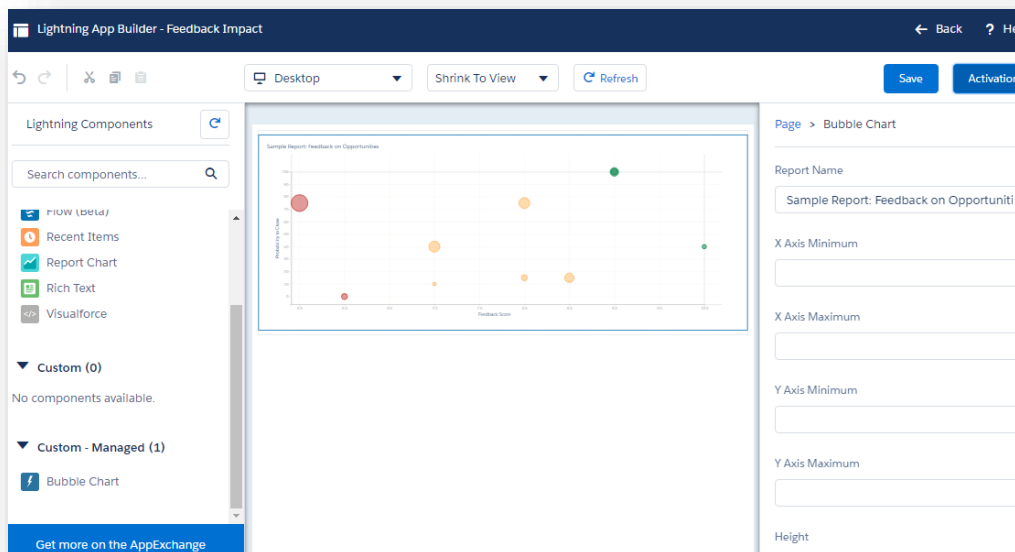
Adding the Bubble Chart Component to Lightning App or Record Page

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**

The screenshot shows the "Activation for Feedback Impact" dialog box. It has three tabs: "PAGE SETTINGS", "LIGHTNING EXPERIENCE", and "SALESFORCE1". The "PAGE SETTINGS" tab is active. It contains the following sections:

- App Name:** A text input field with the value "Feedback Impact".
- Icon:** A section with a blue star icon and a "Change..." link.
- Page Activation:** A section with a description: "When you activate this page, a custom tab is created for it. You can manage the tab's visibility in Setup." Below this are two radio buttons: "Activate for all users" (selected) and "Activate for System Administrators only".

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

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.