



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

SALESPULSE INSTALLATION AND CONFIGURATION GUIDE

This guide includes pre- and post-installation steps that need to be performed in order to get Salespulse up and running in your org. 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

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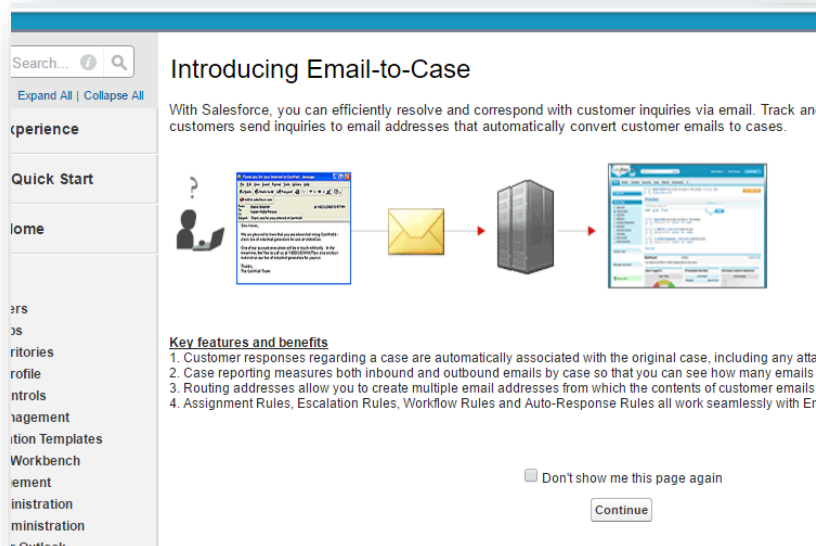
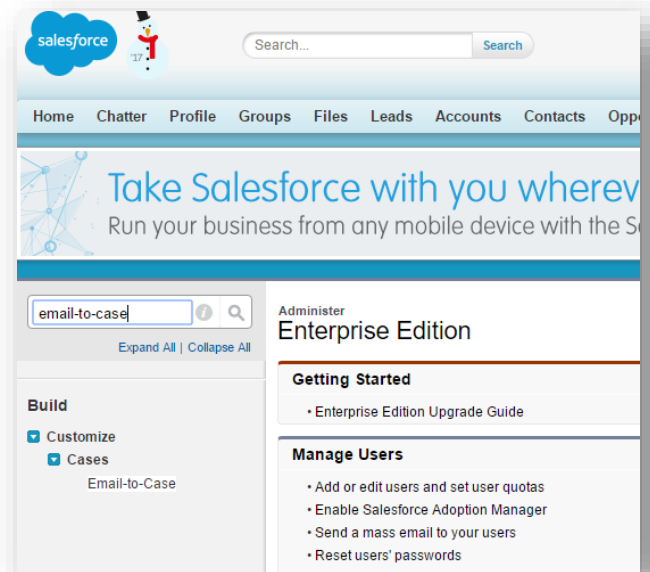
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Pre-Installation requisite

The following step needs to be performed prior to installing Salespulse in your org.

Enabling Email-to-Case

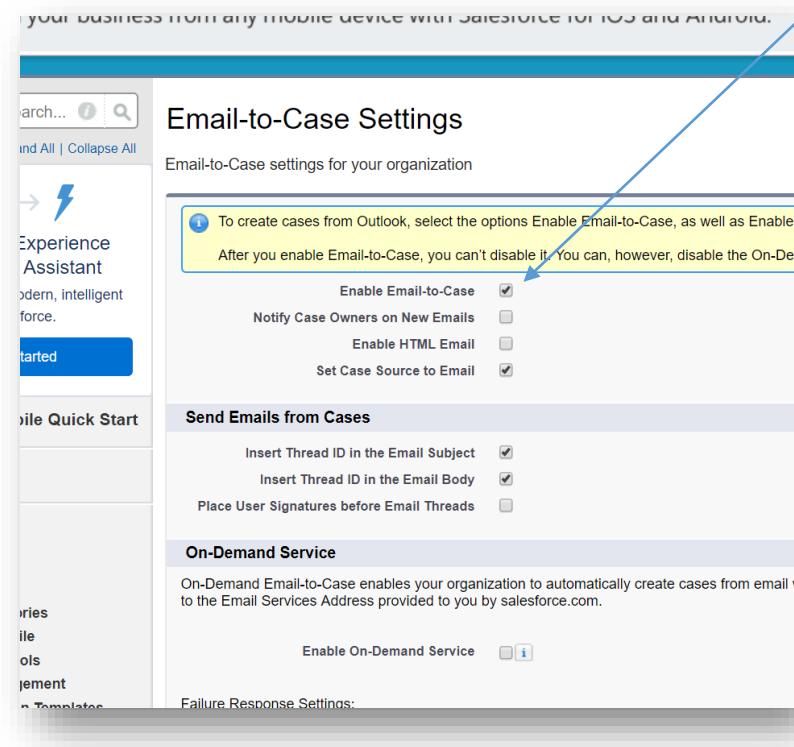
1. From Salesforce Setup, search **Email-to-Case**
2. Next to Email-to-Case Settings click **Edit** and then **Continue** on the next overview screen.



- Next to Email-to-Case Settings click **Edit**.

- You will then need to add a user to be the default case and Automated case owner. Usually this is set to a system administrator and can be changed at a later stage. This has no practical implications other than if you create a case or an automated case without owner this user will be set as the default owner.

5. After you click Save on the support settings, Check the box next to **Enable Email-to-Case** and click **Save**

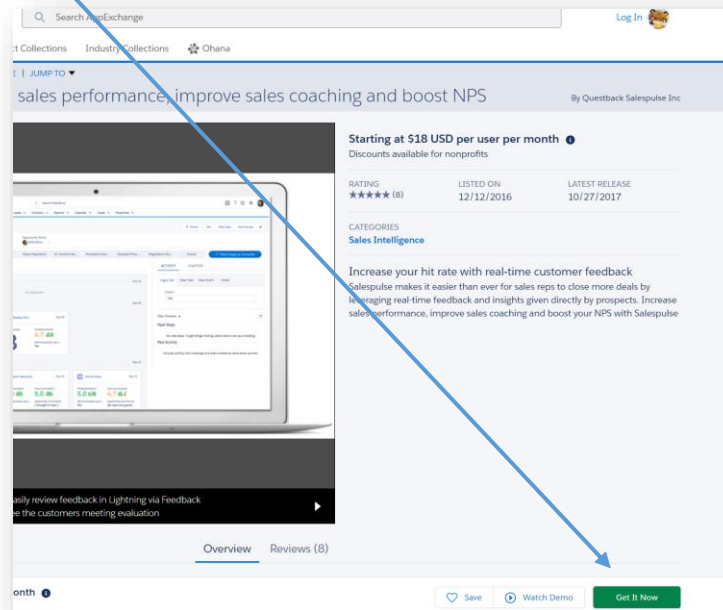


Install from the Salesforce AppExchange

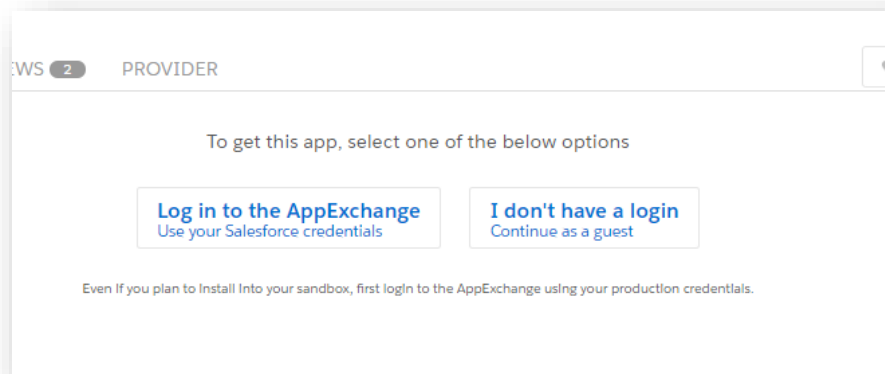
1. Go to the AppExchange listing of Salespulse

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EFnwOUAT>

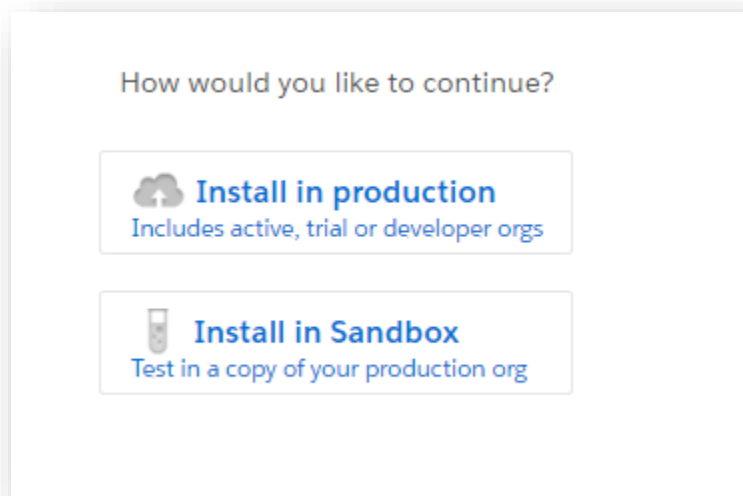
Click on “Get It Now”



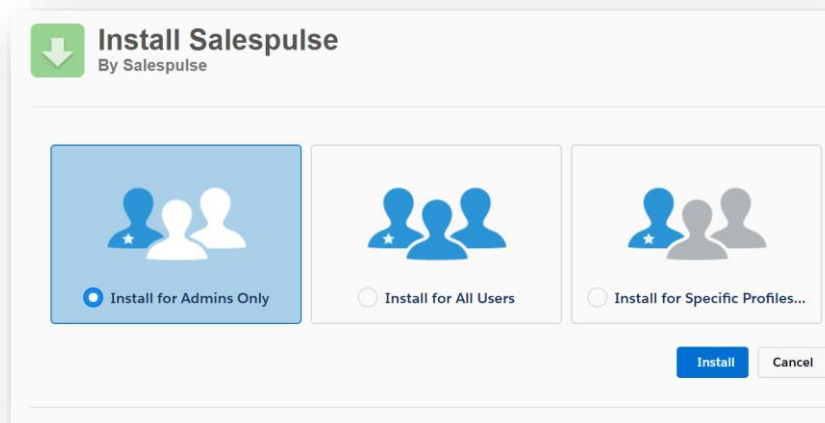
2. You will be prompted to log in to your Salesforce instance.



3. Select if you want to install the package in your Production org or your Sandbox. All features are available in the Sandbox as well as in the Production mode.



4. Select if you want to install for all users or admins only. We recommend installing for Admins only.



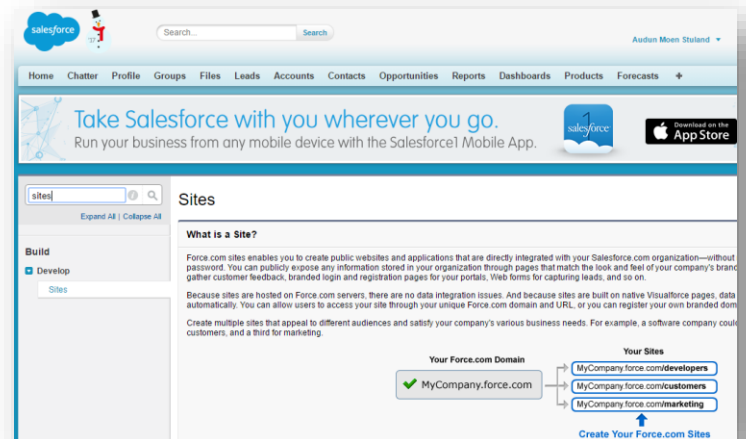
5. Congratulations you have now installed Salespulse. Run through the next Post-Installation steps in this guide to configure Salespulse and then you are ready to go.

Post-Installation - Configuration

The following steps need to be performed after installing Salespulse in your org.

Setting up the domain and sites

1. If you already have set up a domain in your org you can skip this section and jump to the Salespulse survey configuration.
2. From Salesforce Setup, search **Sites**
3. If you have not done so already, you will be prompted to setup your Force.com domain



Add a domain name you want to use. This will be used as part of the survey link to your customers. This must be a unique name.

To get started, first register your company's Force.com domain. Your Force.com domain must be unique and recommends using your company's name or a variation of your company's name, such as 'mycompany'.

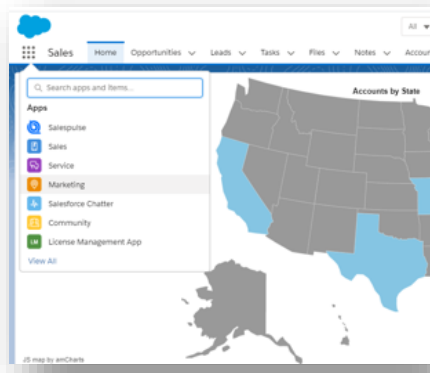
Warning: You cannot modify your Force.com domain name after the registration process.

http:// .force.com

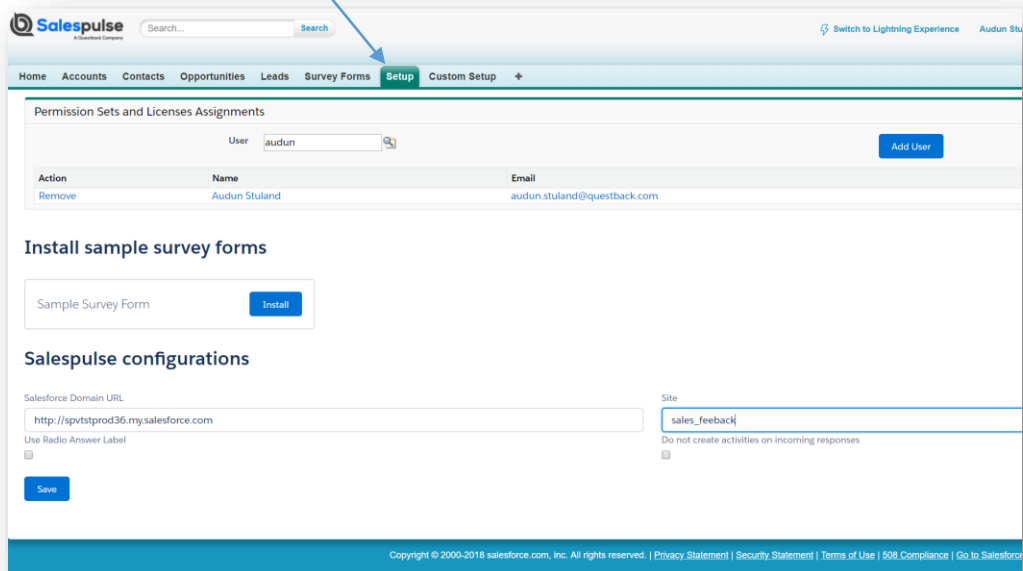
☒ I have read and accepted the Force.com [Sites Terms of Use](#)

Next step: Salespulse survey configuration

1. Go to the Salespulse app configuration by clicking on Salespulse in the Salesforce menu



2. Click on the Setup page

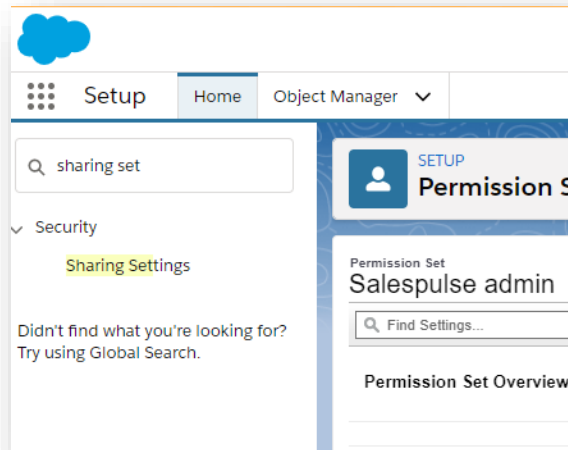


3. Add the users you want to give access to the Salespulse app. This will assign a license and the necessary permission sets. Search for the names and click add user

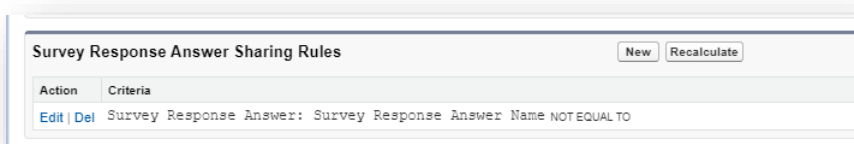
Sharing settings

Salesforce has standard security settings for the guest user profile that is being used to store the survey data when someone sends in feedback. We need to grant read access to the Salespulse custom objects for the user to be able to load and send the survey. This is done by adding sharing rules in the following steps

1. Search for **“sharing settings”** in the search under setup.



2. Towards the bottom of the page all the custom objects you have in your Salesforce instance are listed. We need to add a **“New”** sharing rule:



SETUP
Sharing Settings

Setup
Survey Response Answer Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.
Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization.
You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name

Label: Site guest user survey resp
Rule Name: Site_guest_user_survey_re
Description:

Step 2: Select your rule type

Rule Type: ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

Step 3: Select which records to be shared

By modifying the default settings in accordance with these criteria, you are allowing immediate and unlimited guest users, consider all the use cases and implications and implement security controls that you think are settings.

Criteria	Field	Operator	Value	
	Owner ID	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

Add Filter Logic...

Step 4: Select the users to share with

Share with: Salespulse Site Guest User

Step 5: Select the level of access for the users

Access Level: Read Only

Save Cancel

Give each rule a label and click on **"Guest user access based on Criteria"**
Select the Owner ID -> not equal to -> ""
Share with Salespulse site guest user and read only.

You need to do the same for the following custom objects

- Survey Response**

SETUP
Sharing Settings

Setup
Survey Response Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.
Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization.
You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Select your rule type

Label: Site guest user survey res
Rule Name: Site_guest_user_survey_re
Description:

By modifying the default settings in accordance with these criteria, you are allowing immediate and unlimited guest users, consider all the use cases and implications and implement security controls that you think are settings.

Criteria	Field	Operator	Value	
	Owner ID	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

Add Filter Logic...

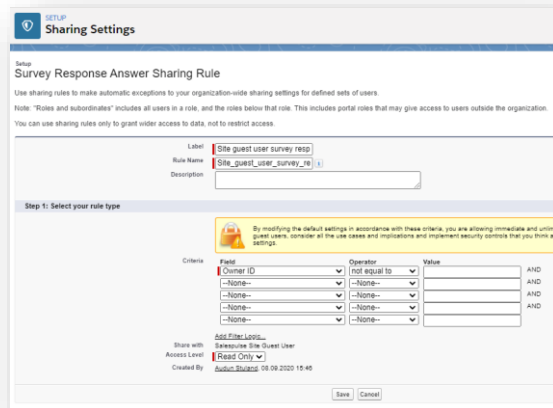
Share with: Salespulse Site Guest User

Access Level: Read Only

Created By: Audun Stuland 08.09.2020 15:46

Save Cancel

- **Survey Response Answer**



Sharing Settings

Survey Response Answer Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization. You can use sharing rules only to grant wider access to data, not to restrict access.

Label: **Site guest user survey resp**

Rule Name: **Site_guest_user_survey_re**

Description:

Step 1: Select your rule type

By modifying the default settings in accordance with these criteria, you are allowing immediate access to guest users. Consider all the use cases and implications and implement security controls that you settings.

Criteria	Field	Operator	Value	
	Owner ID	not equal to		AND
	-None-	-None-		AND
	-None-	-None-		AND
	-None-	-None-		AND

Add Filter Logic...

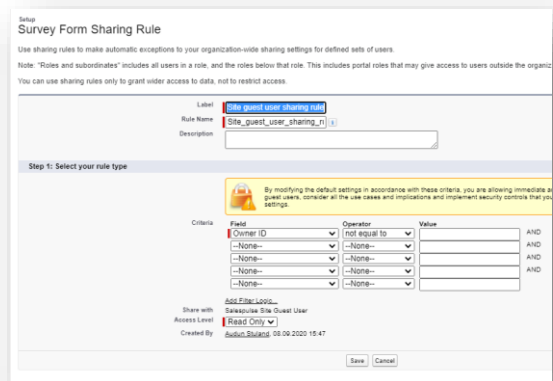
Share with: **Site Guest User**

Access Level: **Read Only**

Created By: **Admin** 08/08/2020 15:45

Save Cancel

- **Survey Form**



Sharing Settings

Survey Form Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization. You can use sharing rules only to grant wider access to data, not to restrict access.

Label: **Site guest user sharing rule**

Rule Name: **Site_guest_user_sharing_r**

Description:

Step 1: Select your rule type

By modifying the default settings in accordance with these criteria, you are allowing immediate access to guest users. Consider all the use cases and implications and implement security controls that you settings.

Criteria	Field	Operator	Value	
	Owner ID	not equal to		AND
	-None-	-None-		AND
	-None-	-None-		AND
	-None-	-None-		AND

Add Filter Logic...

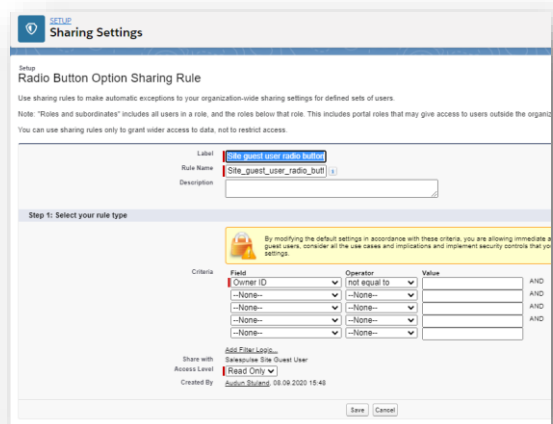
Share with: **Site Guest User**

Access Level: **Read Only**

Created By: **Admin** 08/08/2020 15:47

Save Cancel

- **Radio Button Option**



Sharing Settings

Radio Button Option Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization. You can use sharing rules only to grant wider access to data, not to restrict access.

Label: **Site guest user radio button**

Rule Name: **Site_guest_user_radio_btn**

Description:

Step 1: Select your rule type

By modifying the default settings in accordance with these criteria, you are allowing immediate access to guest users. Consider all the use cases and implications and implement security controls that you settings.

Criteria	Field	Operator	Value	
	Owner ID	not equal to		AND
	-None-	-None-		AND
	-None-	-None-		AND
	-None-	-None-		AND

Add Filter Logic...

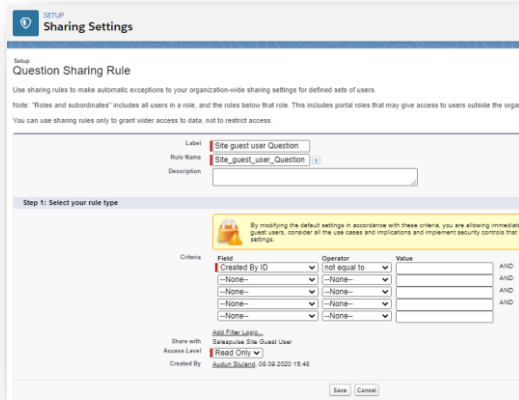
Share with: **Site Guest User**

Access Level: **Read Only**

Created By: **Admin** 08/08/2020 15:48

Save Cancel

- Question



SETUP
Sharing Settings

Setup
Question Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization. You can use sharing rules only to grant wider access to data, not to restrict access.

Label: **Site guest user Question**
Rule Name: **Site_guest_user_Question**
Description:

Step 1: Select your rule type

By modifying the default settings in accordance with these criteria, you are allowing immediate guest users, consider all the use cases and implications and implement security controls that you in settings.

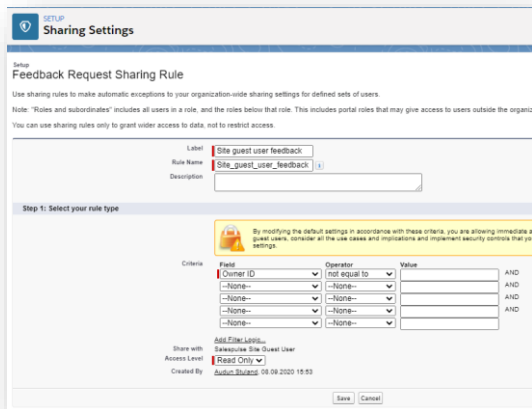
Criteria	Field	Operator	Value	
	Created By ID	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

Add Filter Logic...

Share with: **Salespulse Site Guest User**
Access Level: **Read Only**
Created By: **Audun Staland** 08-09-2020 18:48

Save Cancel

- Feedback Request



SETUP
Sharing Settings

Setup
Feedback Request Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization. You can use sharing rules only to grant wider access to data, not to restrict access.

Label: **Site guest user feedback**
Rule Name: **Site_guest_user_feedback**
Description:

Step 1: Select your rule type

By modifying the default settings in accordance with these criteria, you are allowing immediate and guest users, consider all the use cases and implications and implement security controls that you in settings.

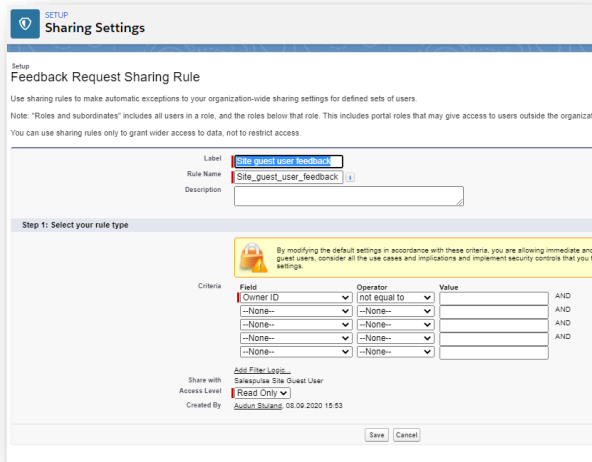
Criteria	Field	Operator	Value	
	Owner ID	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

Add Filter Logic...

Share with: **Salespulse Site Guest User**
Access Level: **Read Only**
Created By: **Audun Staland** 08-09-2020 18:53

Save Cancel

- Feedback Card Configuration



SETUP
Sharing Settings

Setup
Feedback Request Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization. You can use sharing rules only to grant wider access to data, not to restrict access.

Label: **Site guest user feedback**
Rule Name: **Site_guest_user_feedback**
Description:

Step 1: Select your rule type

By modifying the default settings in accordance with these criteria, you are allowing immediate and guest users, consider all the use cases and implications and implement security controls that you in settings.

Criteria	Field	Operator	Value	
	Owner ID	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

Add Filter Logic...

Share with: **Salespulse Site Guest User**
Access Level: **Read Only**
Created By: **Audun Staland** 08-09-2020 18:53

Save Cancel

- Email Proxy

SETUP
Sharing Settings

Setup
Email Proxy Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.
Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the org.
You can use sharing rules only to grant wider access to data, not to restrict access.

Label: **Site guest user email proxy**
Rule Name: **Site_guest_user_email_proxy**
Description:

Step 1: Select your rule type

By modifying the default settings in accordance with these criteria, you are allowing immediate guest users, consider all the use cases and implications and implement security controls that you settings.

Criteria	Field	Operator	Value	
	Owner ID	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

Add Filter Logic...

Share with: **Salespulse Site Guest User**
Access Level: **Read Only**
Created By: **Austin Sturges** 08/08/2020 15:53

Save Cancel

- Net Promoter Score

SETUP
Sharing Settings

Setup
Net Promoter Score Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.
Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the org.
You can use sharing rules only to grant wider access to data, not to restrict access.

Label: **Site guest user NPS**
Rule Name: **Site_guest_user_NPS**
Description:

Step 1: Select your rule type

By modifying the default settings in accordance with these criteria, you are allowing immediate guest users, consider all the use cases and implications and implement security controls that you settings.

Criteria	Field	Operator	Value	
	Created By ID	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

Add Filter Logic...

Share with: **Salespulse Site Guest User**
Access Level: **Read Only**
Created By: **Austin Sturges** 08/08/2020 15:49

Save Cancel

- Dropdown Option

SETUP
Sharing Settings

Setup
Dropdown Option Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.
Note: "Roles and subordinates" includes all users in a role, and the roles below that role.
You can use sharing rules only to grant wider access to data, not to restrict access.

Label: **Site guest user dropdown**
Rule Name: **Site_guest_user_dropdown**
Description:

Step 1: Select your rule type

By modifying the default settings in accordance with these criteria, you are allowing immediate guest users, consider all the use cases and implications and implement security controls that you settings.

Criteria	Field	Operator	Value	
	Created By ID	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

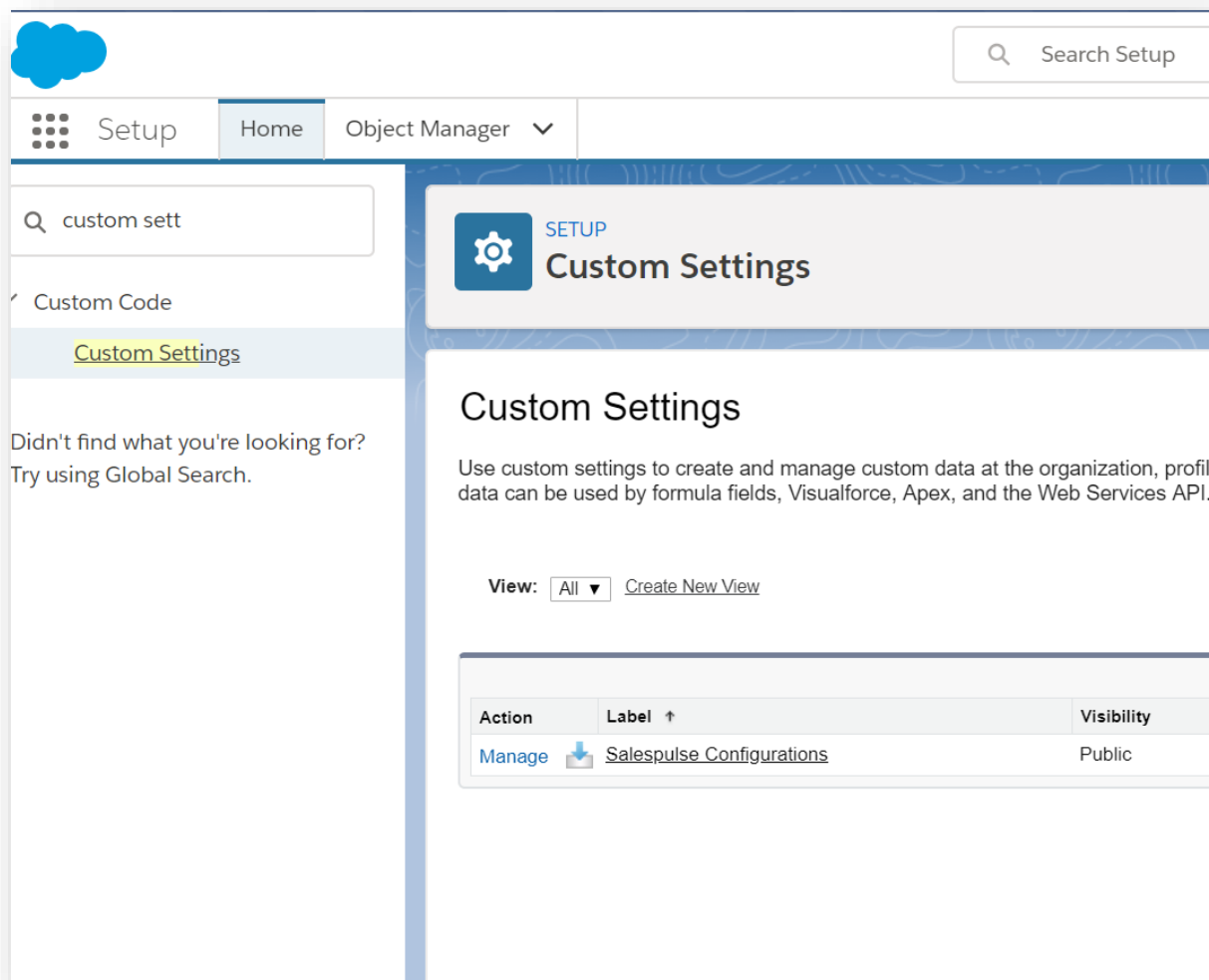
Add Filter Logic...

Share with: **Salespulse Site Guest User**
Access Level: **Read Only**
Created By: **Austin Moss Sturges** 8/11/2020 2:26 PM

Save Cancel

IF YOU INSTALL IN SANDBOX YOU NEED TO FOLLOW THESE ADDITIONAL STEPS, IF NOT THEN SKIP TO “Next step: Adding the Request Feedback Quick Action and Button to Object Page Layouts”

1. Go to Setup->Custom settings and click on “Salespulse configurations”



2. Click on Manage and then Edit

- You need to add the name of **your** sandbox in the site url. Copy the sandbox name and add:

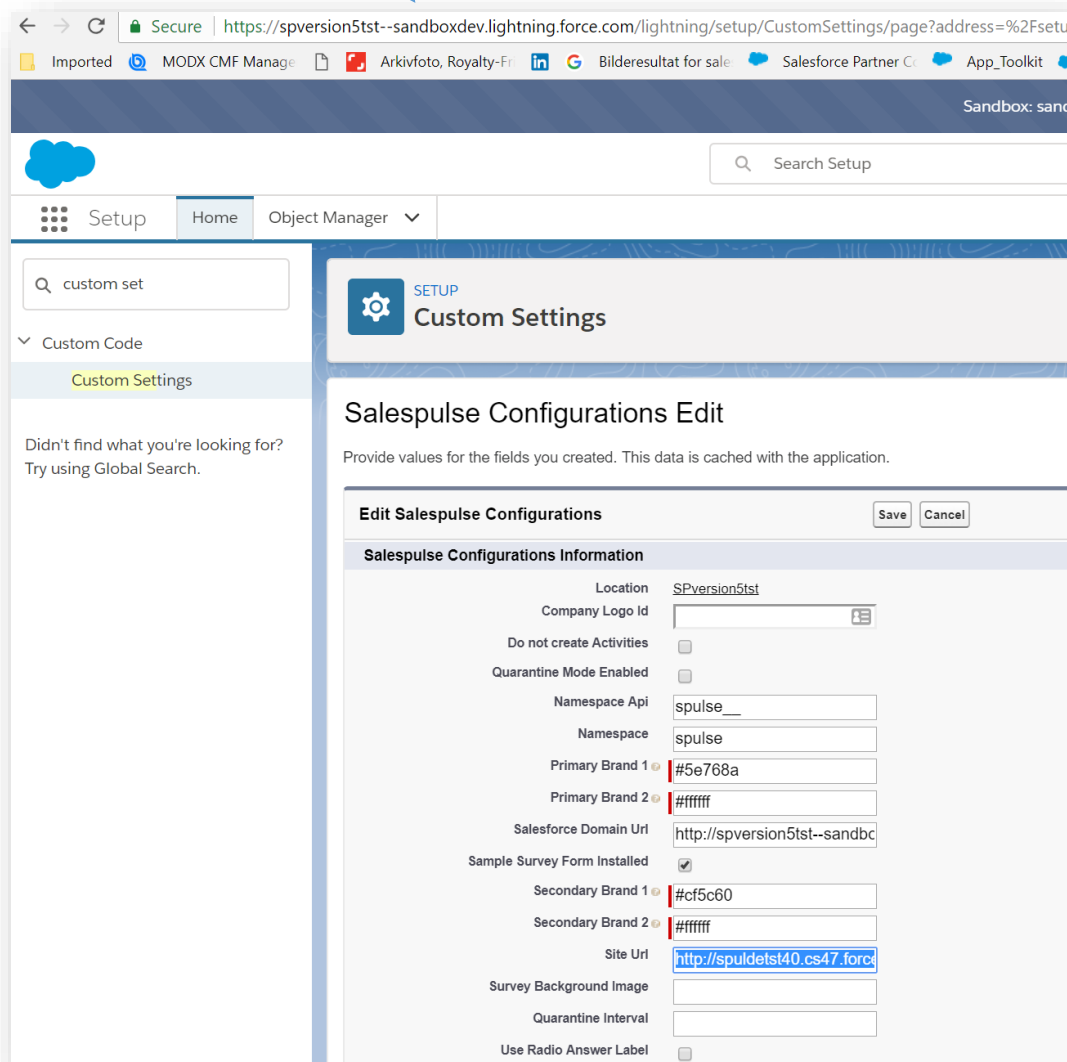
Example Before

Site URL: <http://spuldetst40.cs47.force.com/salespulse>

Example After

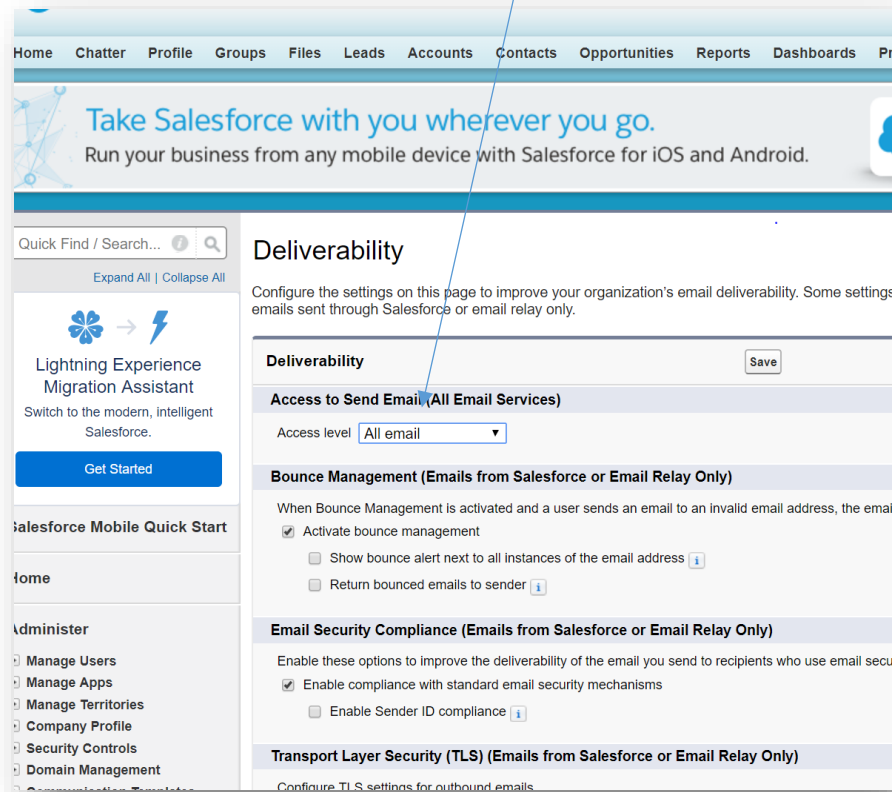
Site URL: <http://sandboxdev-spuldetst40.cs47.force.com/salespulse>

We add “**sandboxdev**” in the URL and click save (Remember to add the “-” after the sandbox name). This is the name of your sandbox installation and you find this name in your URL on top of the page



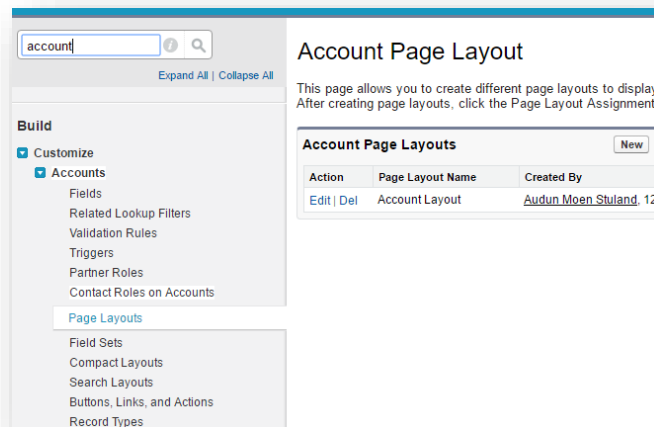
The screenshot shows the Salesforce Setup interface for 'Custom Settings'. The left sidebar has a search bar with 'custom set' and a list of categories including 'Custom Code' and 'Custom Settings'. The main content area is titled 'Salespulse Configurations Edit' and contains a form for 'Edit Salespulse Configurations'. The form includes fields for 'Location' (SPversion5tst), 'Company Logo Id', 'Do not create Activities', 'Quarantine Mode Enabled', 'Namespace Api' (spulse__), 'Namespace' (spulse), 'Primary Brand 1' (#5e768a), 'Primary Brand 2' (#####), 'Salesforce Domain Url' (http://spversion5tst--sandbc), 'Sample Survey Form Installed' (checked), 'Secondary Brand 1' (#cf5c60), 'Secondary Brand 2' (#####), 'Site Url' (http://spuldetst40.cs47.force.com/salespulse), 'Survey Background Image', 'Quarantine Interval', and 'Use Radio Answer Label'. The 'Site Url' field is highlighted with a blue box, and an arrow points from the text 'We add “sandboxdev” in the URL' to the 'Site Url' field.

Also make sure that Deliverability is set to **All Email**.
You find this under **Salesforce Setup->Deliverability**

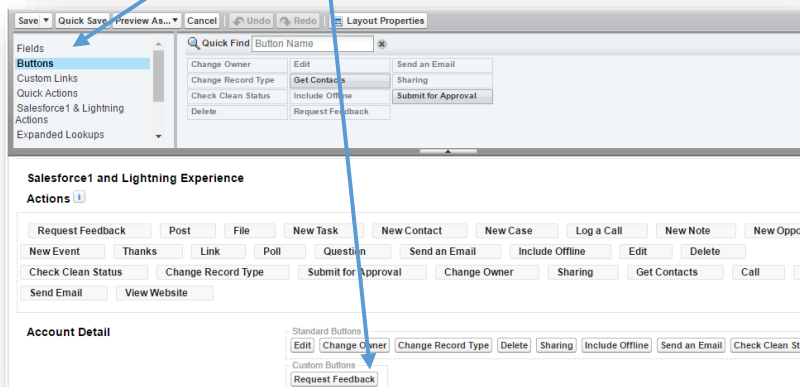


Next step: Adding the Request Feedback Quick Action and Button to Object Page Layouts

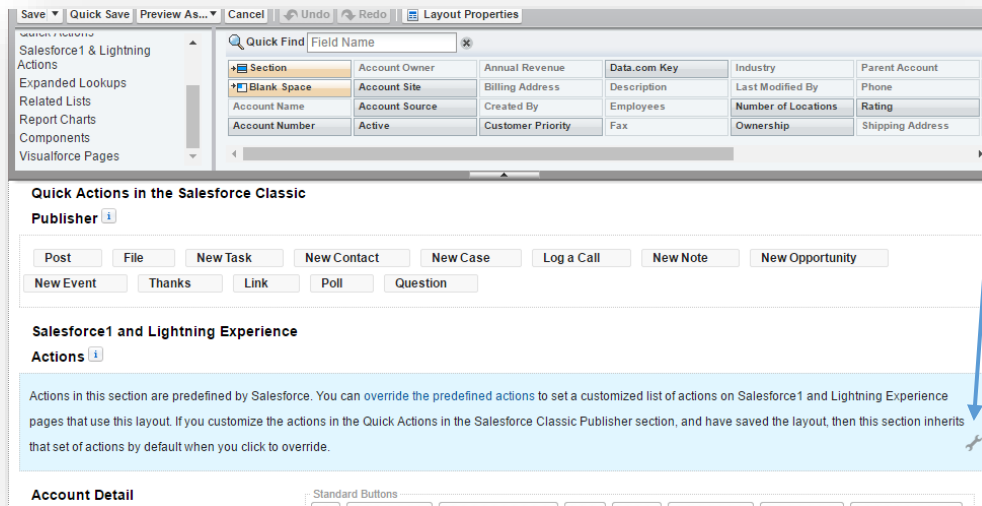
1. From **Lightning** navigate to Salesforce Setup and search **Object Manager**
 - Optionally, you can edit page layouts from Setup in **Classic** by searching for the object name and clicking Page Layouts



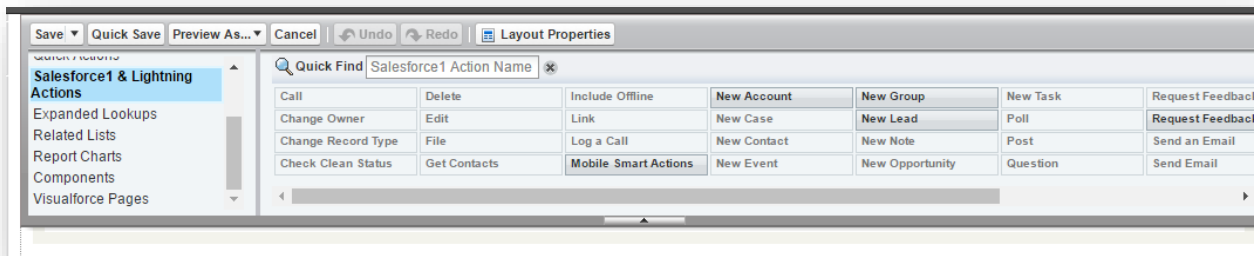
2. Start by clicking on **Account**
3. Under **Page Layouts** click the layout you wish edit and add a Request Feedback button to (Opportunity, Contact, Lead or Account)
4. At the top of the page select **Buttons** in the left column
5. Click and drag the **Request Feedback** button onto the page into the Custom Buttons area next to Account Detail



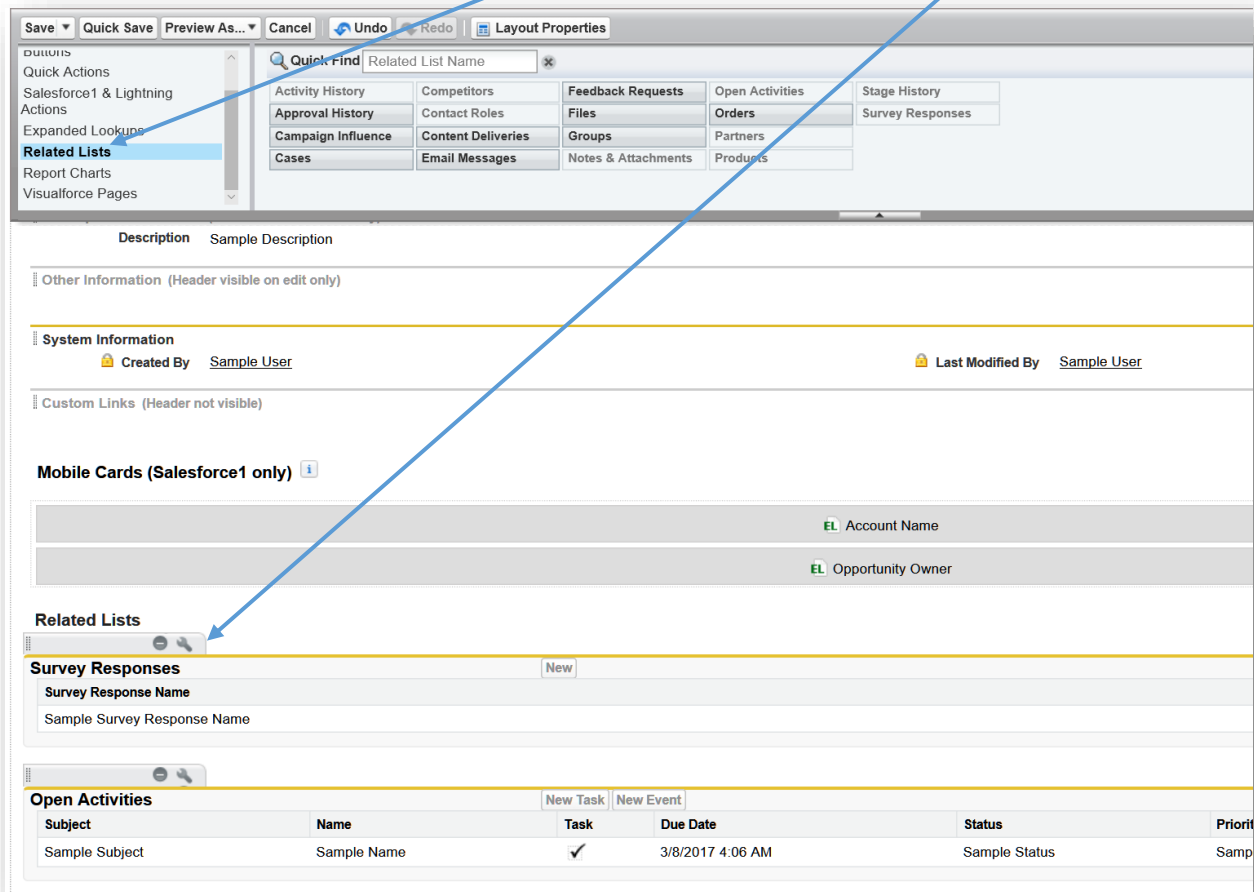
6. **LIGHTNING SETUP:** Under **Salesforce1 and Lightning Experience Actions**, click the wrench icon on the right side (appears on hover) to expose the actions



7. At the top of the page select **Salesforce1 and Lightning Actions** in the left column
8. Click and drag the **Request Opportunity Feedback**(If you are adding this to Account then add the Request Account Feedback button) action onto the page in the Salesforce1 and Lightning Experience Actions area.



9. **Add the Survey responses to the Related lists.** Click Related lists and drag the Survey responses to the Related lists section. This allows you to see the survey responses on the Opportunity page in Classic.



4. Once you are done editing the page layout, click **Save**
5. Repeat this process for the **Contact, Event, Lead, and Opportunity** objects

Congratulations!
You have now successfully set up the Salespulse application.

It may take up to 15 minutes for the site URL to become active

If you created the domain/sites for the first time it can take up till 15 minutes before the domain is registered and ready to use. In the meantime, you will get this screen if you try to provide feedback on the survey before the process is finished. Wait 15 minutes and then test the link again.

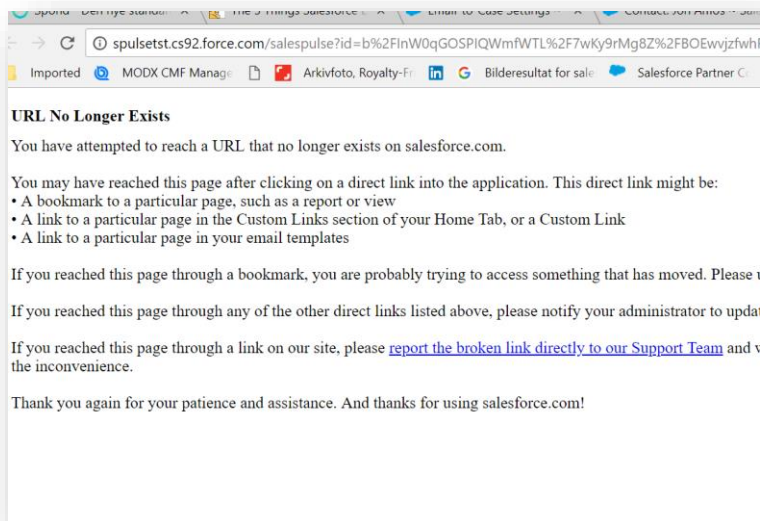


This site can't be reached

sptstprod41.force.com's server IP address could not be found.

- Go to <http://force.com/>
- Search Google for [sptstprod 41 force](#)

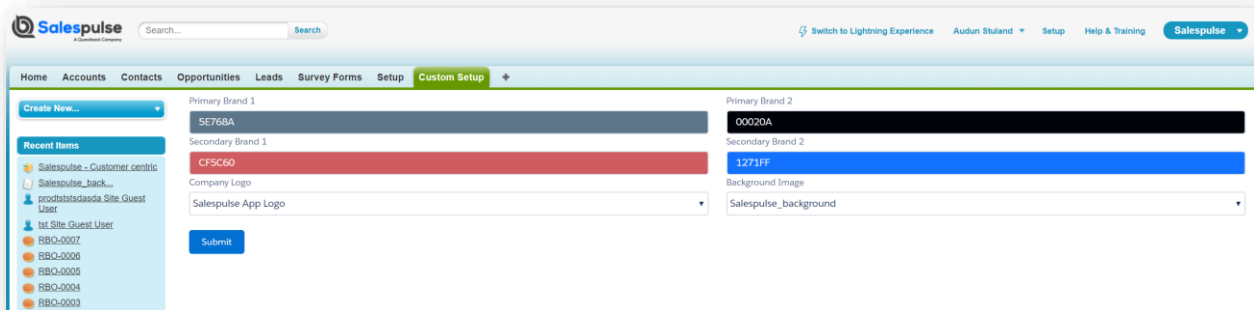
ERR_NAME_NOT_RESOLVED



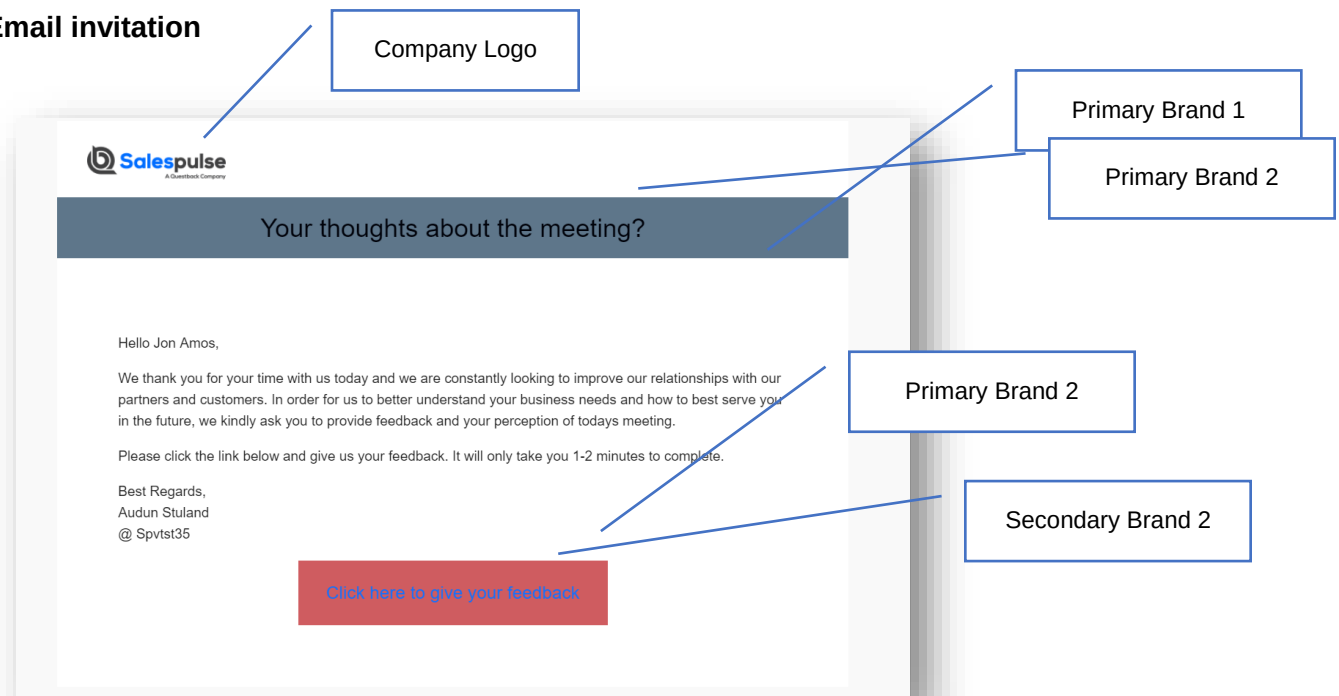
Custom Setup, branding, logo and colors

You can change the colors, add logo and background image on the Custom Setup page. This sets the default variables for all surveys. You can also set different logos and colors for each individual survey form. This is done under each survey in the Survey Form tab.

1. Select the different brand colors. Each color is specified on the email template and the survey template in the images further down in this document.



Email invitation



Survey template

Company Logo

Primary Brand 1

Primary Brand 2

Primary Brand 2

Secondary Brand 2

Background Image

The image shows a survey template on a web browser. The background is a light blue and white pattern. The survey content is as follows:

- Header:** A dark blue bar with the text "We appreciate your feedback!" in white.
- Logo:** The Salespulse logo is in the top left corner of the survey area.
- Question:** "How likely is it that you would recommend Spvtstas to a friend or colleague?" (0 = not at all likely; 10 = extremely likely)
- Scale:** A horizontal scale from 0 to 10 with radio button indicators below each number.
- Buttons:** A red "Return" button is located at the bottom right of the survey area.
- Footer:** A dark blue bar with the text "© Copyright Spvtstas All Rights Reserved."

Callout boxes point to the following elements:

- Survey template:** Points to the overall survey area.
- Company Logo:** Points to the Salespulse logo.
- Primary Brand 1:** Points to the "We appreciate your feedback!" text.
- Primary Brand 2:** Points to the question text.
- Primary Brand 2:** Points to the scale numbers.
- Secondary Brand 2:** Points to the "Return" button.
- Background Image:** Points to the overall background of the survey.