



BE ALL EARS..

CONFIGURATION GUIDE

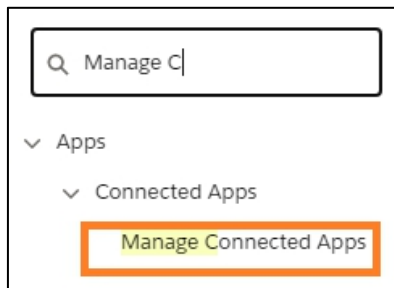
Voice Configuration Guide

1. Voice Connected App.....	3
2. Site Creation.....	3
3. Permission Sets.....	5
4. Organization wide email address.....	6
5. Sharing Settings.....	7
6. SMS (Twilio Configuration).....	11
7. Session Settings.....	13

1. Voice Connected App

The Voice connected app is used to launch the application and which would be deployed as part of the package. The profiles of the users who needs access to the application needs to be added under the connected app as shown below

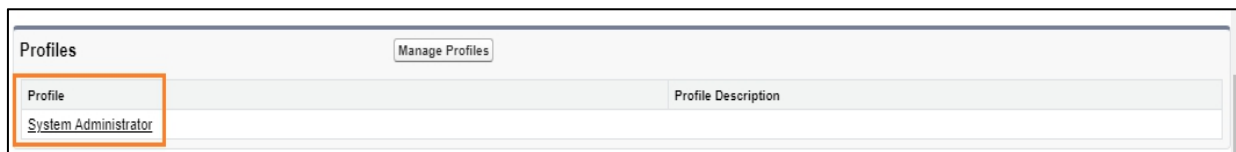
Search for Manage Connected Apps under Setup



Click on Manage Connected Apps and then select Voice connected app.



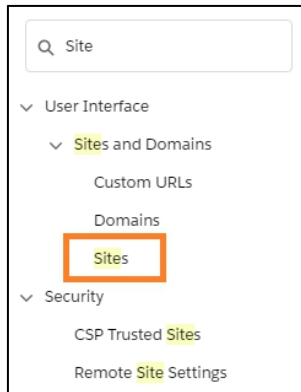
Add the profiles which needs access to the application



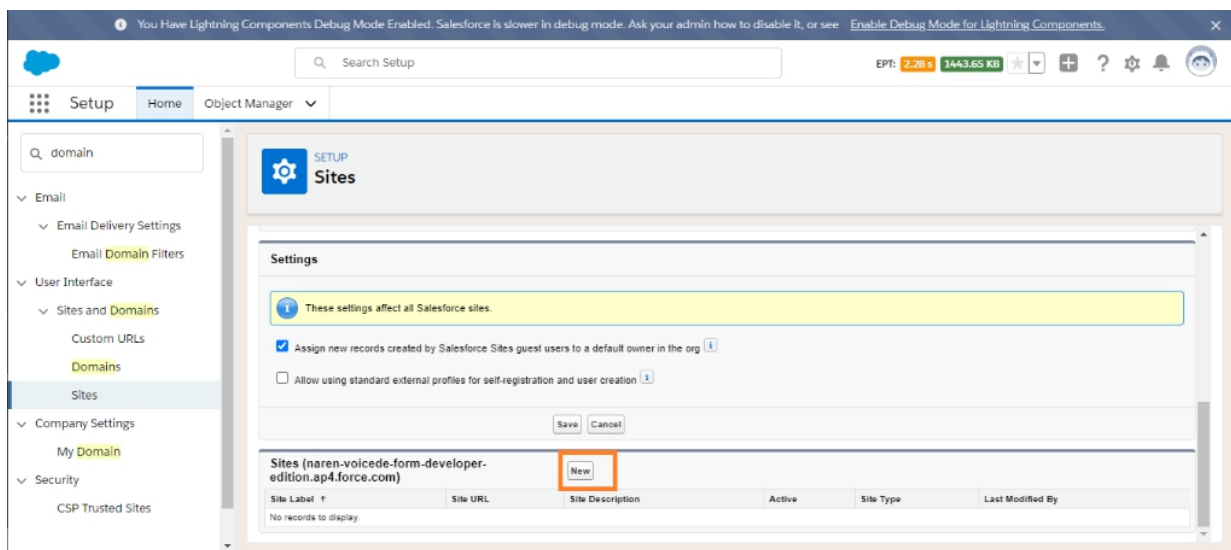
2. Site Creation

A Force.com Site has to be created to provide access for the public users to access the assessments/surveys created using the Voice application.

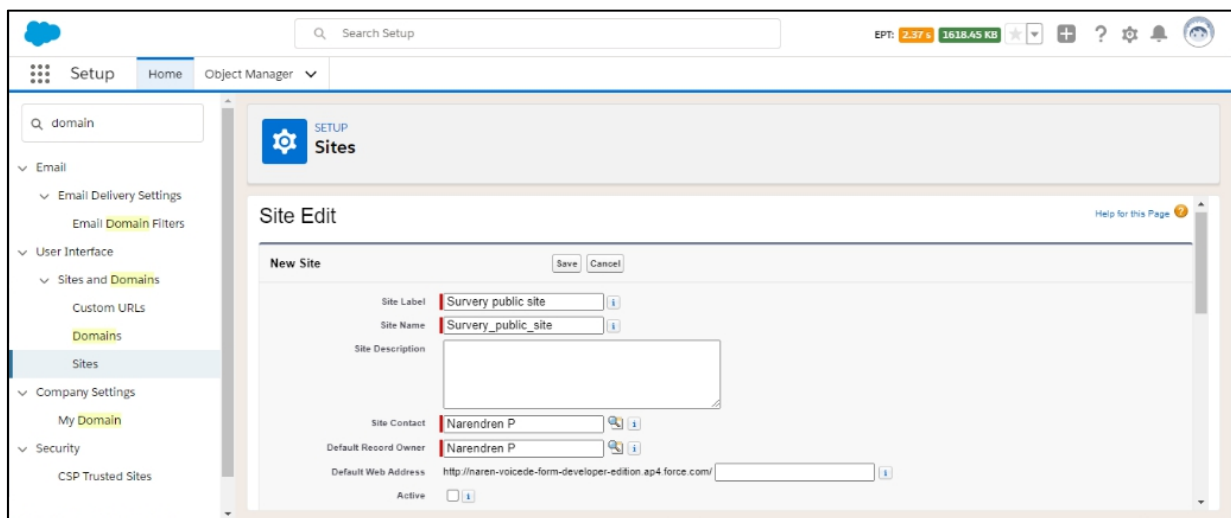
Search for Manage Connected Apps under Setup



Click on New button to create a new force.com site



Enter the details as shown in the below screenshots



Default web address should be “voice”

Default Web Address

Setup - Sites and Domains

Active ☒

Active Site Home Page

Inactive Site Home Page (Preview)

Site Template

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

URL Rewriter Class

Enable Feeds ☐

Clickjack Protection Level

Require Secure Connections (HTTPS) ☒

Lightning Features for Guest Users ☒

Setup - Sites

Lightning Features for Guest Users ☒

Upgrade all requests to HTTPS ☒

Enable Content Sniffing Protection ☒

Enable Browser Cross Site Scripting Protection ☒

Referrer URL Protection ☒

Guest Access to the Payments API ☐

Guest Access to the Support API ☐

Save Cancel

Click on Save to create the site based on the details given and then activate it.

3. Permission Set Assignment

The package contains following 2 permission sets which needs to be assigned to the appropriate users for the proper functioning of the app.

- ❖ Voice User
- ❖ Voice Site User

Navigate to permission set configuration by searching for Permission Sets under the Setup Menu.



3.1 Voice Site User

Select the “Voice Site User” permission set from the permission set list.

☐	Clone	Voice Site User	Public site user
☐	Clone	Voice User	Salesforce

Click on Manage assignments button and select the Voice Guest user to assign the permission set to the site guest user.

3.2 Voice User

Select the “Voice User” permission set from the permission set list.

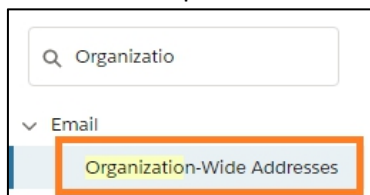
☐	Clone	Voice Site User	Public site user
☐	Clone	Voice User	Salesforce

Click on Manage assignments button and select all the Users who would needing the access to the Voice application to create and send assessments/surveys.

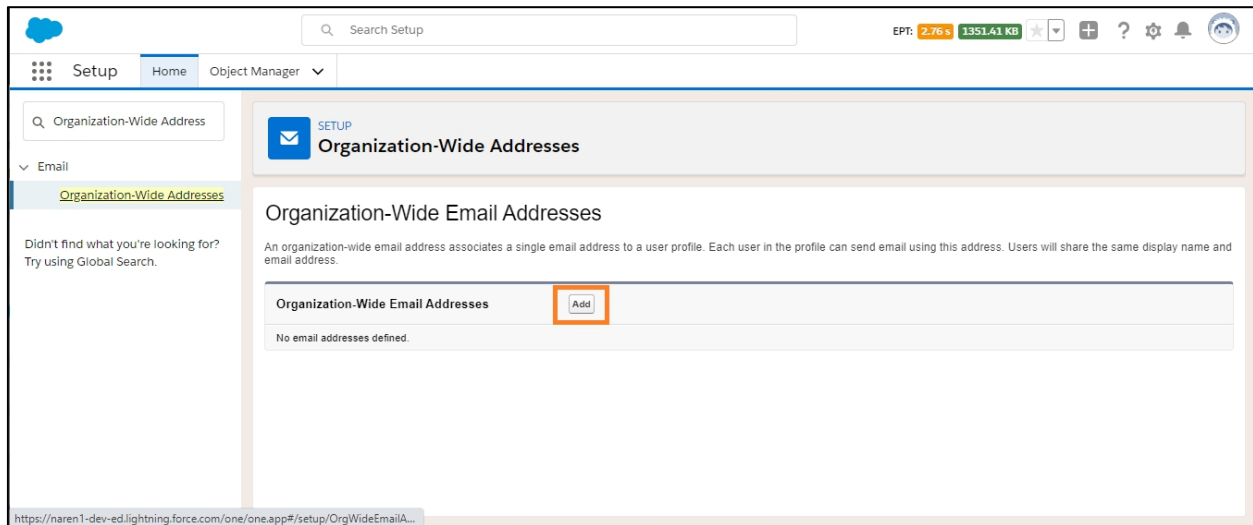
4. Organization Wide Email Address

Organization wide email address has to be created to send the assessments emails. This email address will act as the from email address while sending the assessments.

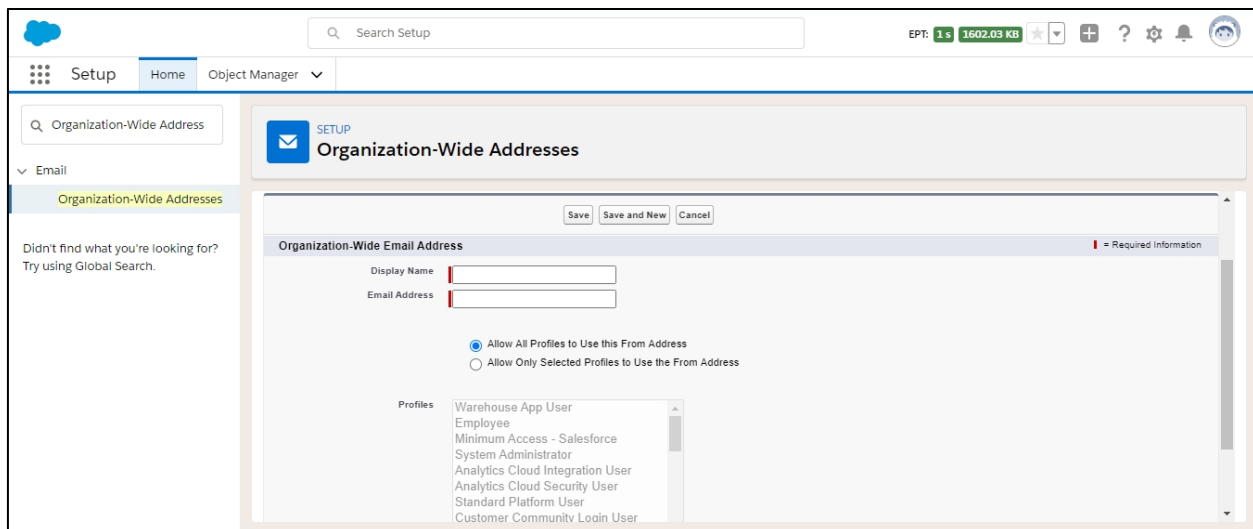
Navigate to Organization wide email address configuration by selecting the Organization-wide addresses under the setup menu.



Click on Add button to add a new organization wide email address.



Enter the values for display name and the email address field. Then select all the profiles that needs access to this particular organization wide email address to send emails.



5. Sharing Settings

Sharing settings needs to be created to provide access to the guest users to fill out the assessments/surveys.

Search and select Sharing settings option which can be found under the setup menu.

5.1 Assessment Answer Sharing Rules

Click New button under the Assessment Answer sharing rules and configure it as given below.

Setup

Assessment 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.

You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name

Label

Rule Name ⓘ

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 access to your community for guest users, consider all the use cases and implications and implement security controls that you think related to this change from default settings.

Criteria	Field	Operator	Value	
	Assessment Answer Name	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

[Add Filter Logic...](#)

Step 4: Select the users to share with

Share with

Step 5: Select the level of access for the users

Access Level

5.2 Assessment Master Sharing Rules

Click New button under the Assessment Master sharing rules and configure it as given below.

Setup

Assessment Master 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.

Step 1: Rule Name

Label

Rule Name ⓘ

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 access to all records in your community for guest users, consider all the use cases and implications and implement security controls that you think are related to this change from default settings.

Criteria	Field	Operator	Value	
	Assessment Master Name	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

[Add Filter Logic](#)

Step 4: Select the users to share with

Share with

Step 5: Select the level of access for the users

Access Level

5.3 Assessment Template Sharing Rules

Click New button under the Assessment Template sharing rules and configure it as given below.

Setup

Assessment Template 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.

Step 1: Rule Name

Label

Voice Guest User

Rule Name

Voice_Guest_User

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 access to all records in your community for guest users. Consider all the use cases and implications and implement security controls that you think are related to this change from default settings.

Criteria

Field	Operator	Value	
Assessment Template Name	not equal to		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Step 4: Select the users to share with

Share with

Voice Site Guest User

Step 5: Select the level of access for the users

Access Level

Read Only

5.4 Template Folder Sharing Rules

Click New button under the Template Folder sharing rules and configure it as given below.

Setup

Template Folder 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.

Step 1: Rule Name

Label

Rule Name

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 access to your community for guest users. Consider all the use cases and implications and implement security controls that you think related to this change from default settings.

Criteria	Field	Operator	Value	
	Template Folder Name	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

Add Filter Logic...

Step 4: Select the users to share with

Share with

Step 5: Select the level of access for the users

Access Level

6. SMS (Twilio Configuration)

This configuration is need only if the SMS feature has to be enabled. Voice application uses Twilio to send assessment/survey links through SMS. Twilio account details can be configured in Salesforce as given below.

Select Custom Metadata under the Setup menu and click on Manage Records link for Survey Configuration custom metadata.

All Custom Metadata Types

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

New Custom Metadata Type						
Action	Label	Namespace Prefix	Visibility	Api Name	Record Size	Description
Manage Records	Survey Configuration	TSB	Public	TSB__Survey_Configuration__mdt	396	

 **SETUP**
Custom Metadata Types

Survey Configurations

View: All [Create New View](#)

New

Action	Label	Survey Configuration Name	Namespace Prefix
Edit Del 	Current Version	Current_Version	TSB
Edit Del 	LicenceManagementApi	LicenceManagementApi	TSB
Edit Del 	Send Email Batch Size	Send_Email_Batch_Size	TSB
Edit Del 	Send SMS AccountSid	Send_SMS_AccountSid	TSB
Edit Del	Send SMS AccountSid1	Send_SMS_AccountSid1	TSB
Edit Del 	Send SMS Batch Size	Send_SMS_Batch_Size	TSB
Edit Del	Send SMS Token1	Send_SMS_Token1	TSB
Edit Del 	Survey Link Merge Field	Survey_Link_Merge_Field	TSB
Edit Del	Twilio AccountSid	Twilio_AccountSid	TSB
Edit Del	Twilio Token	Twilio_Token	TSB
Edit Del 	Unsubscribe Link Merge Field	Unsubscribe_Link_Merge_Field	TSB

Show me [fewer](#) records per list page

Click on Edit link under the Twilio AccountSid and provide the AccountSid value in the value field.

 **Setup** Home Object Manager

Custom Labels

Sites and Domains

Custom URLs

Custom Code

- Apex Classes
- Apex Debugger
- Apex Hammer Test Results
- Apex Settings
- Apex Test Execution
- Apex Test History
- Apex Triggers
- Canvas App Previewer
- Custom Metadata Types**
- Custom Permissions

 **SETUP**
Custom Metadata Types

Survey Configuration

Survey Configuration Edit

[Save](#) [Save & New](#) [Cancel](#)

Information

Label

Twilio AccountSid

Survey Configuration Name

Twilio_AccountSid

Value

Protected Component

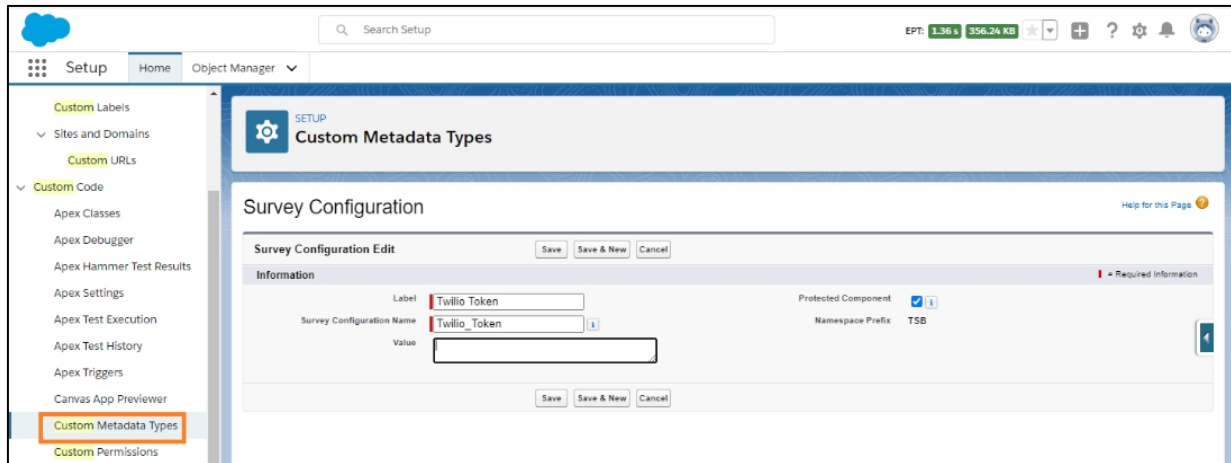
☒

Namespace Prefix

TSB

[Save](#) [Save & New](#) [Cancel](#)

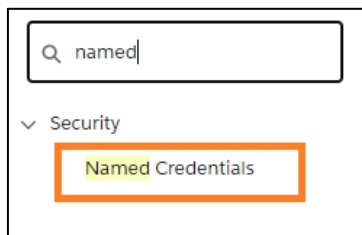
Similarly configure the Twilio token by click on Edit link under the Twilio Token configuration record.



Named Credential:

A named credential has to be created to configure the twilio api end point for making the callouts.

Search for Named Credentials under the Setup menu



Add the following details

Label: Twilio end point

URL: <https://api.twilio.com>

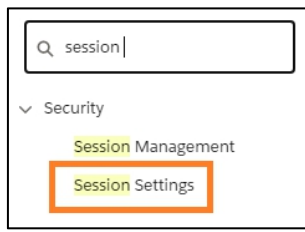
Username: Enter your **AccountSid**

New Named Credential			
Action	Label ↑	URL	Username
Edit Del	Twilio end point	https://api.twilio.com	"Account SID"

7. Session Settings

Lightning Domain needs to be added to the trusted domain under the session settings for the proper working of the file upload feature.

Open Session Settings configuration by selecting Session Settings under the Setup menu



Under the trusted domain section click on Add domain button and add your lightning domain url to white list the domain.

