



USAGE GUIDE

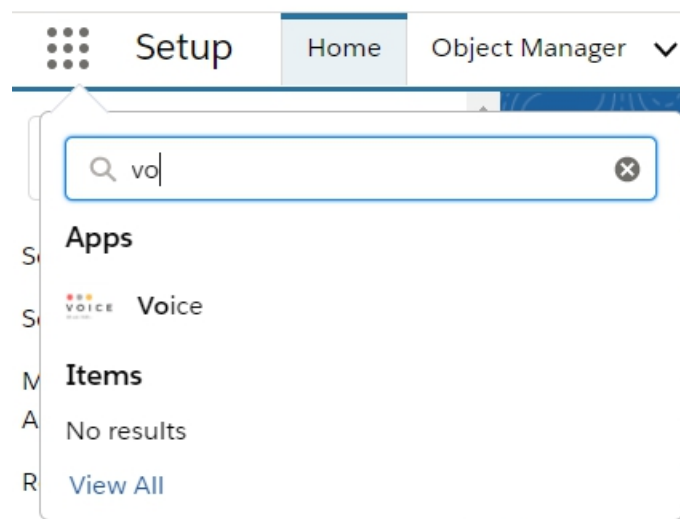
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1. Voice App Launcher

Once the Voice application has been installed, the app can be launched from the application launcher.

Search for Voice from the application launcher and then select the Voice app to open the application.

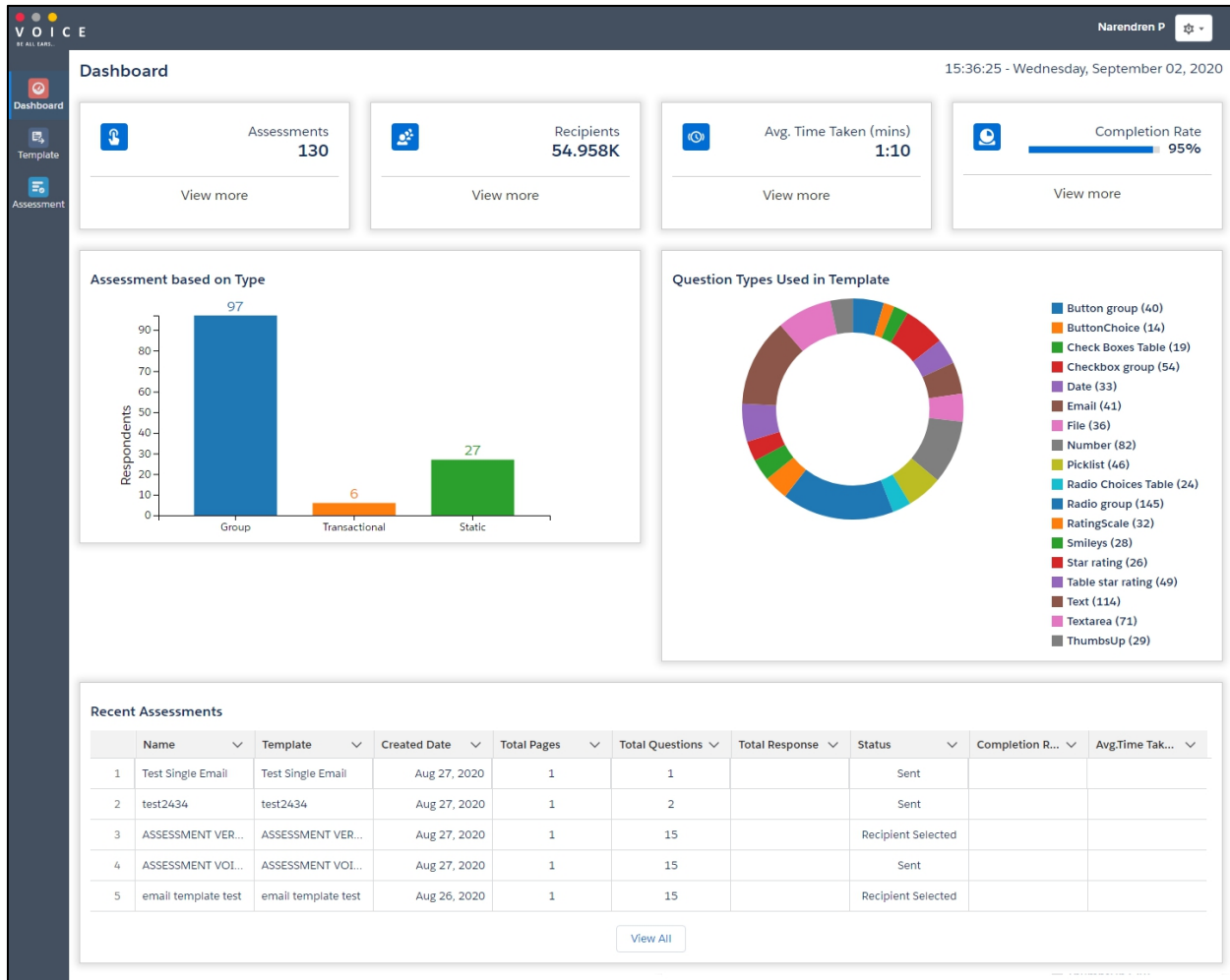


The application has following menus in the sidebar which helps the user to navigate to the respective page.

- ❖ Dashboard
- ❖ Template
- ❖ Assessment

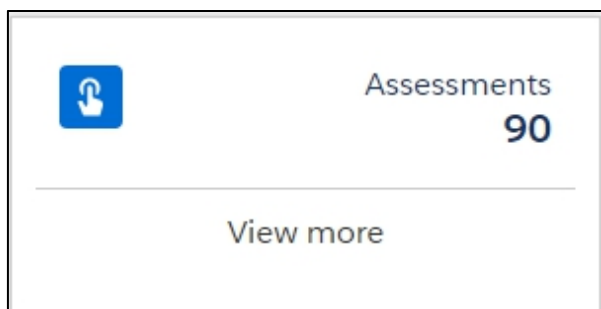
2. Dashboard

Dashboard is the default landing page and it consists of an overall statistics of the application like no. Of assessments sent, total number of recipients, Average time taken, Completion rate and recent assessments etc.,



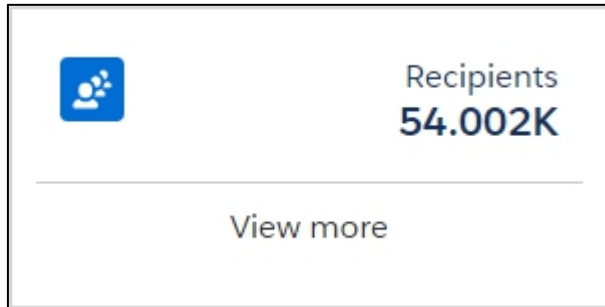
a) Assessments

This section holds the information about the total number of Assessments that has been created in the application.



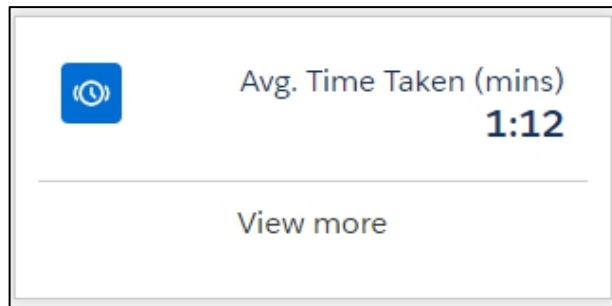
b) Recipients

This section holds the information about the total number of recipients to whom the assessments have been sent.



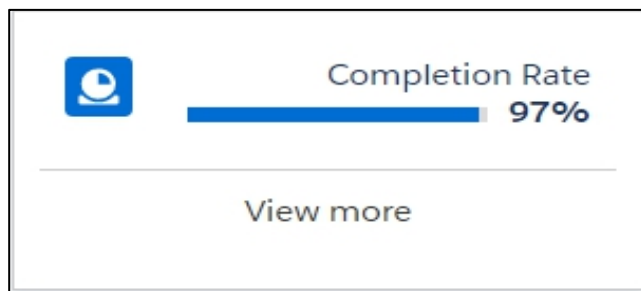
c) Average Time Taken

This section holds the information about the average time taken to complete assessments.



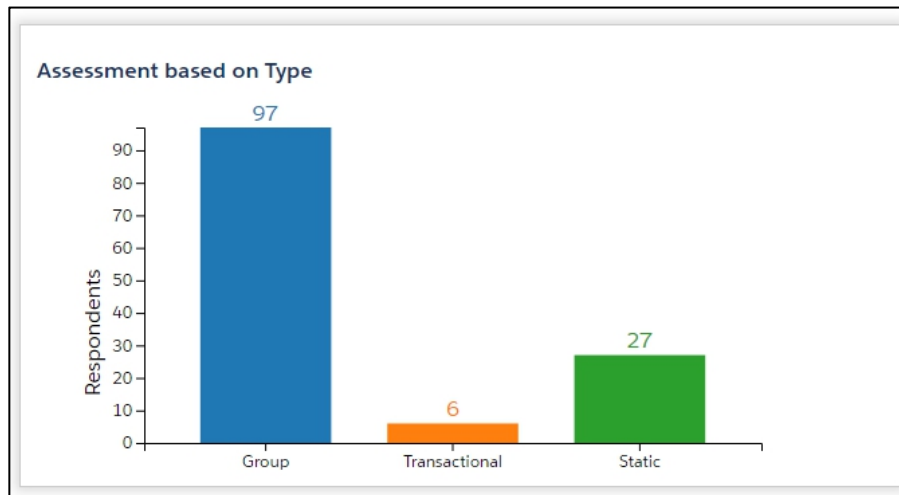
d) Completion Rate

This section holds the information about the average completion rate of the Assessment.



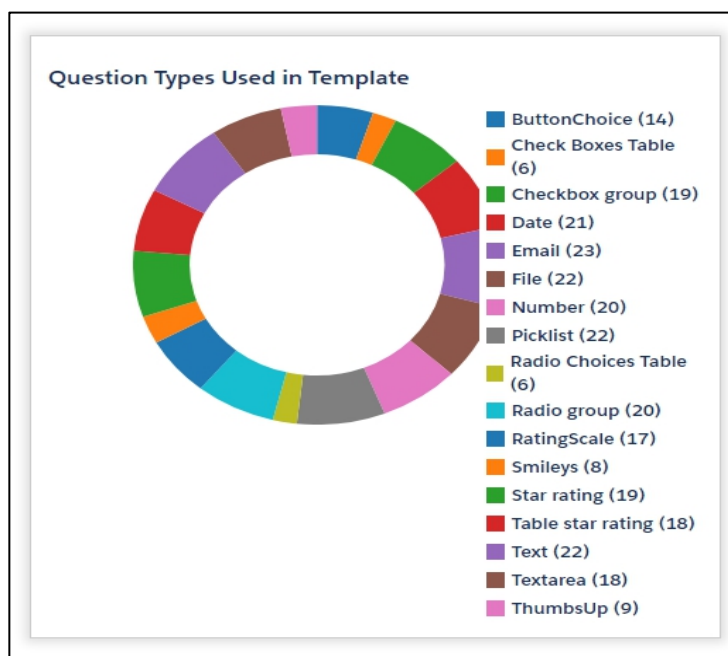
e) Assessments based on Type

This section holds the information about the overall information of the assessment taken based on their type.



f) Question Types Used in Template

This section holds the information about the total number of Question Types that are used in templates



g) Question Types Used in Template

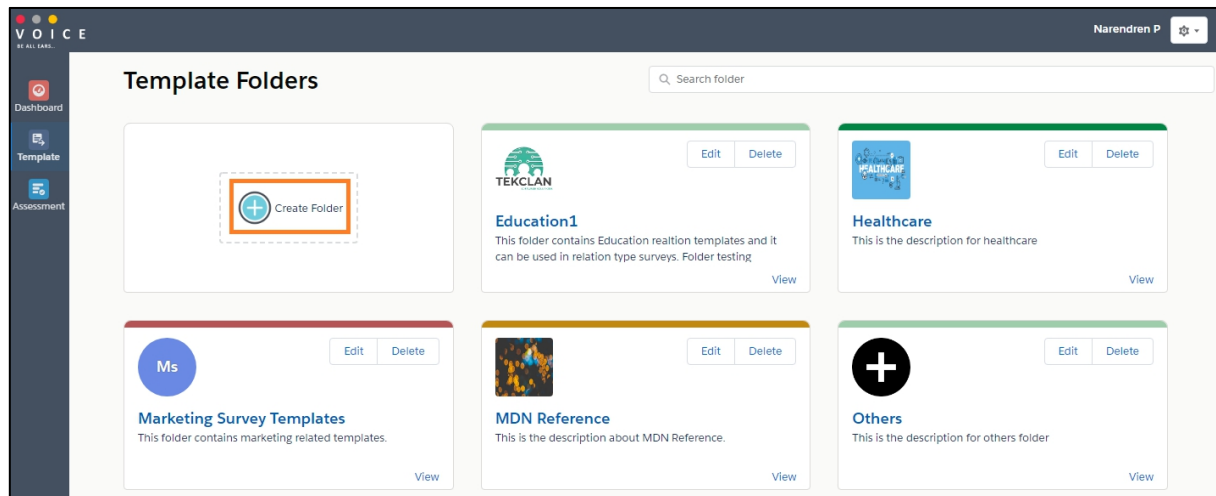
This section holds the information about the recent Assessment that has been created.

Recent Assessments									
	Name	Template	Created Date	Total Pages	Total Questi...	Total Respo...	Status	Completion ...	Avg.Time Ta...
1	Test 18-08-2020 ...	Test 18-08-2020 ...	Aug 18, 2020	1	1		Sent		
2	Test 18-08-2020 ...	Test 18-08-2020 ...	Aug 18, 2020	1	1	5	Sent	100	0:6
3	TEST SURVEY 18...	TEST SURVEY 18...	Aug 18, 2020	1	1		Sent		
4	Test 18-08-2020 ...	Test 18-08-2020 ...	Aug 18, 2020	1	1		Sent		
5	Test 18-08-2020 ...	Test 18-08-2020 ...	Aug 18, 2020	1	1	1	Sent	100	0:5

[View All](#)

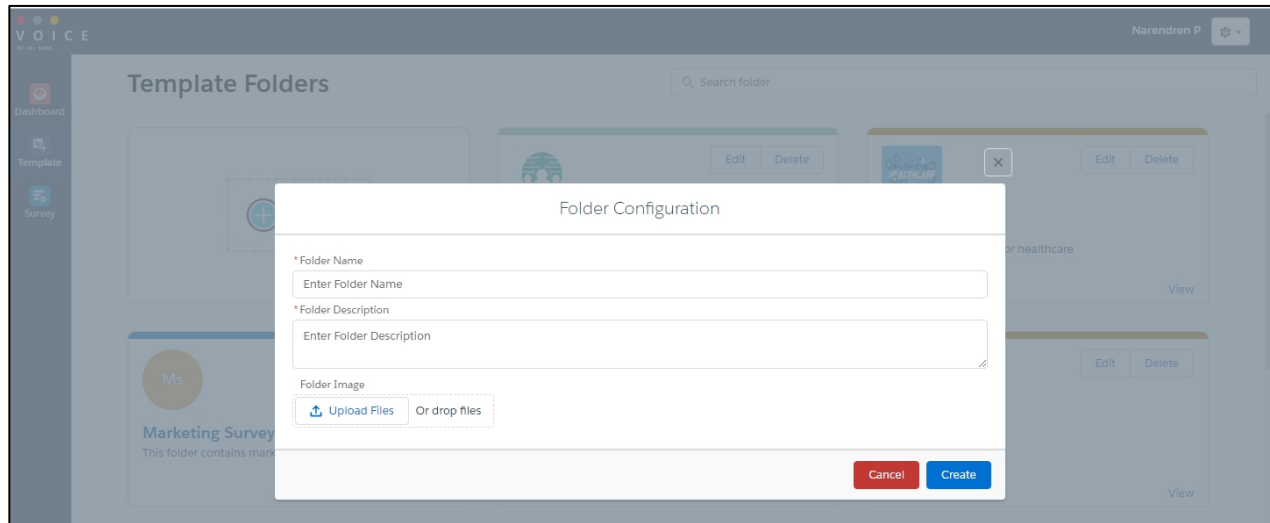
3. Templates

A template is a reusable set of questions and configurations that can be used while sending assessments. Folders can be created to group the templates based on their type.

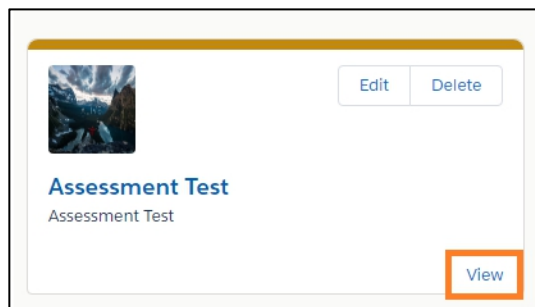


Folders can be created by clicking on the Create Folder Icon in the Template Folders page. Following are the information needed to create the folders.

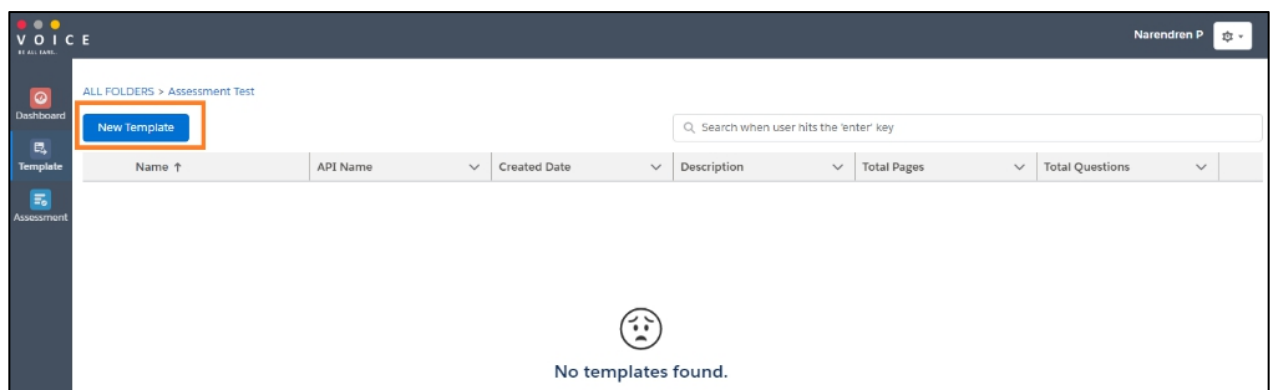
- ❖ Folder Name
- ❖ Folder Description
- ❖ Folder Image (Optional)



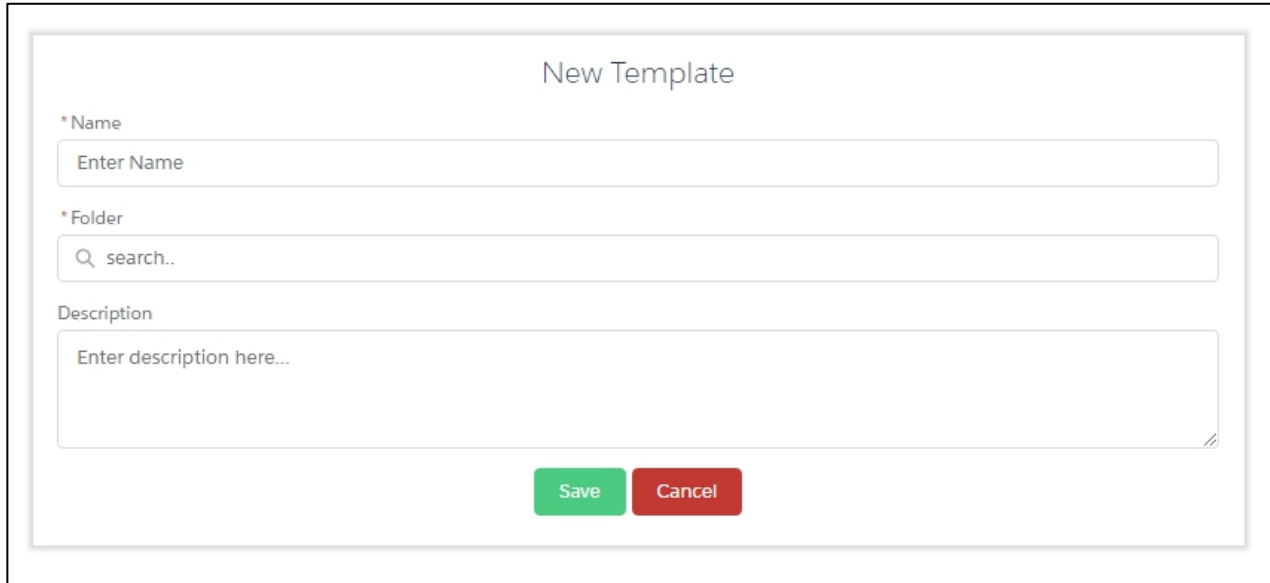
Clicking on a View button will take to the folders template list view where all the templates under that particular folder will be listed.



Clicking on a New Template button will take to the template builder page where various options will be given to create a template according to any specific need.



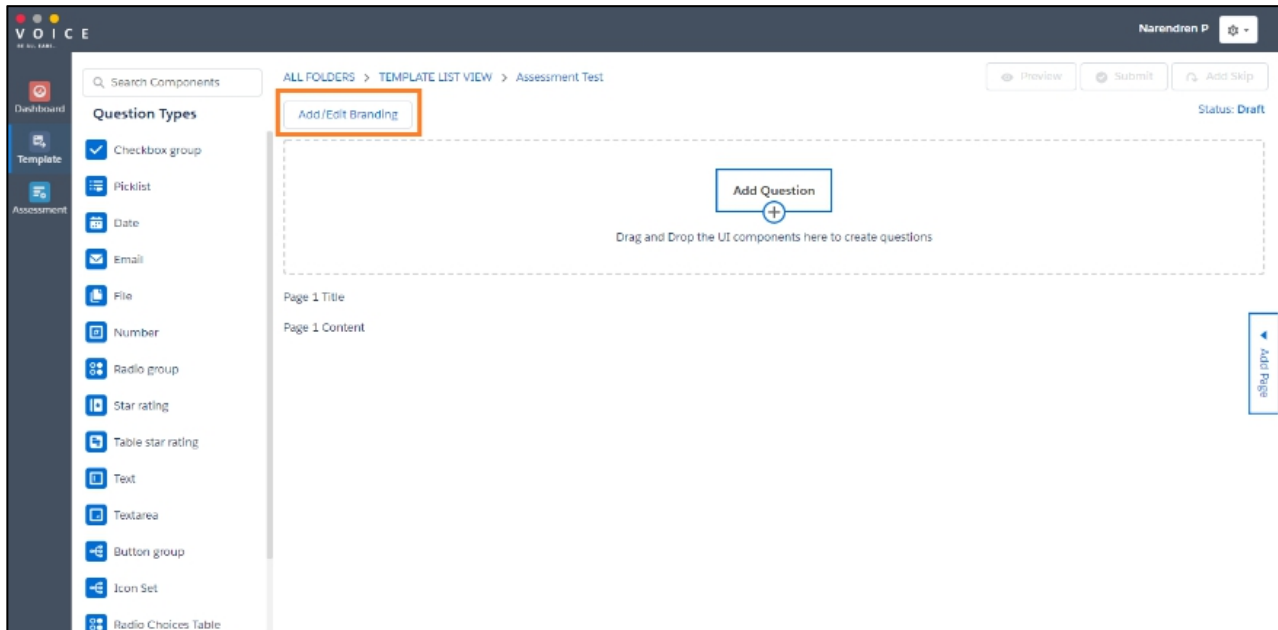
Enter the Template Name, Folder and Description and click on Save to proceed to the builder page.



The image shows a 'New Template' form. It has three input fields: '* Name' with a placeholder 'Enter Name', '* Folder' with a placeholder 'search..' and a magnifying glass icon, and 'Description' with a placeholder 'Enter description here...'. At the bottom right are two buttons: a green 'Save' button and a red 'Cancel' button.

a) Add/Edit Branding

The Add/Edit Branding section allows you to design the assessment template based on the need.



The image shows the 'VOICE' Assessment Test Builder interface. The top navigation bar includes 'ALL FOLDERS > TEMPLATE LIST VIEW > Assessment Test'. On the left, a sidebar lists 'Question Types' with various UI components like 'Checkbox group', 'Picklist', 'Date', 'Email', 'File', 'Number', 'Radio group', 'Star rating', 'Table star rating', 'Text', 'Textarea', 'Button group', 'Icon Set', and 'Radio Choices Table'. The main area is titled 'Add/Edit Branding' (highlighted with an orange box) and contains a large dashed box with an 'Add Question' button and the text 'Drag and Drop the UI components here to create questions'. Below this are sections for 'Page 1 Title' and 'Page 1 Content'. The top right has buttons for 'Preview', 'Submit', and 'Add Skip', and a 'Status: Draft' indicator. A vertical 'Add Page' button is on the right side.

i) Header

The header section consists of the following:

- ❖ Logo
- ❖ Title
- ❖ Subtitle.

The screenshot displays the 'Add/Edit Branding' dialog box within the VOICE application. The dialog is titled 'Add/Edit Branding' and has tabs for 'Header', 'Page Title', 'Body', 'Theme', and 'Message'. The 'Header' tab is selected, showing settings for the header section. The settings include:

- Background Color:** A color picker and a text input field.
- Logo:**
 - Choose Logo:** A button to 'Upload Files' or 'Or drop files'.
 - Logo Alignment:** Radio buttons for 'Left', 'Center', and 'Right'.
 - Margin Top:** A text input field with a value of '0'.
- Title:**
 - Title:** A text input field with the placeholder 'Enter title'.
 - Title Alignment:** Radio buttons for 'Left', 'Center', and 'Right'.
 - Margin Top:** A text input field with a value of '0'.
 - Font Size:** Radio buttons for 'X-Small', 'Small', 'Medium', 'Large', and 'X-Large'.
 - Font Color:** A color picker and a text input field.
 - Font Weight:** Radio buttons for 'Bold' and 'Normal'.
 - Font Style:** Radio buttons for 'Italic' and 'Normal'.
 - Font Family:** A dropdown menu with 'Salesforce Sans' selected.
- Subtitle:**
 - Subtitle:** A text input field with the placeholder 'Enter subtitle'.
 - Subtitle Alignment:** Radio buttons for 'Left', 'Center', and 'Right'.
 - Margin Top:** A text input field with a value of '0'.
 - Font Size:** Radio buttons for 'X-Small', 'Small', 'Medium', 'Large', and 'X-Large'.
 - Font Color:** A color picker and a text input field.
 - Font Weight:** Radio buttons for 'Bold' and 'Normal'.
 - Font Style:** Radio buttons for 'Italic' and 'Normal'.
 - Font Family:** A dropdown menu with 'Salesforce Sans' selected.

At the bottom of the dialog, there are 'Cancel' and 'Save' buttons. The background of the application shows a sidebar with 'Question Types' and 'Assessment' sections, and a main area with a 'Status: Draft' indicator.

LOGO

- ❖ Choose Logo – Use this button to upload the logo to the template
- ❖ Logo Alignment – Logo can be aligned Left /Center/Right
- ❖ Margin Top – For setting the top margin

Background Color

Logo

Choose Logo

Upload Files

 Or drop files

Logo Alignment

Left

Center

Right

Margin Top

0

TITLE

- ❖ Title – Text for the title header
- ❖ Title Alignment- Align Left /Center/Right
- ❖ Font Size – Size of your header(X-Small / Small / Medium / Large / X-Large)
- ❖ Font Color - Color of the Title
- ❖ Font Weight - Bold/ Normal
- ❖ Font Style- Italic/Normal
- ❖ Font Family – Text font for the Header

Title

Title

Enter title

Title Alignment

LeftCenterRight

Margin Top

0

Font Size

X-SmallSmallMediumLargeX-Large

Font Color

Font Weight

BoldNormal

Font Style

ItalicNormal

Font Family

Salesforce Sans

SUBTITLE

- ❖ Subtitle – Text for Subtitle
- ❖ Subtitle Alignment- Align Left /Center/Right
- ❖ Font Size – Size of your header(X-Small / Small / Medium / Large / X-Large)
- ❖ Font Color - Color of the Subtitle
- ❖ Font Weight - Bold/ Normal
- ❖ Font Style- Italic/Normal
- ❖ Font Family – Text font for the Subtitle

Subtitle

Subtitle

Subtitle Alignment

Left

Center

Right

Margin Top

Font Size

X-Small

Small

Medium

Large

X-Large

Font Color

▼

Font Weight

Bold

Normal

Font Style

Italic

Normal

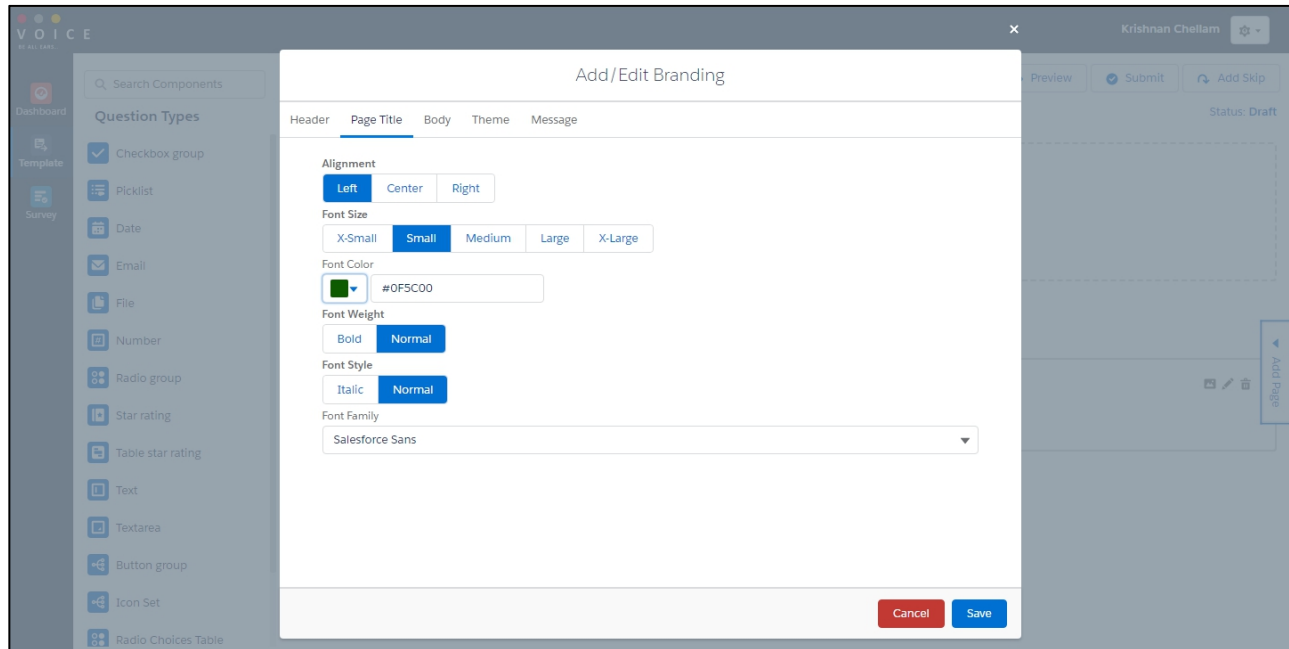
Font Family

▼

ii) Page Title

Following are configured under the Page Title tab

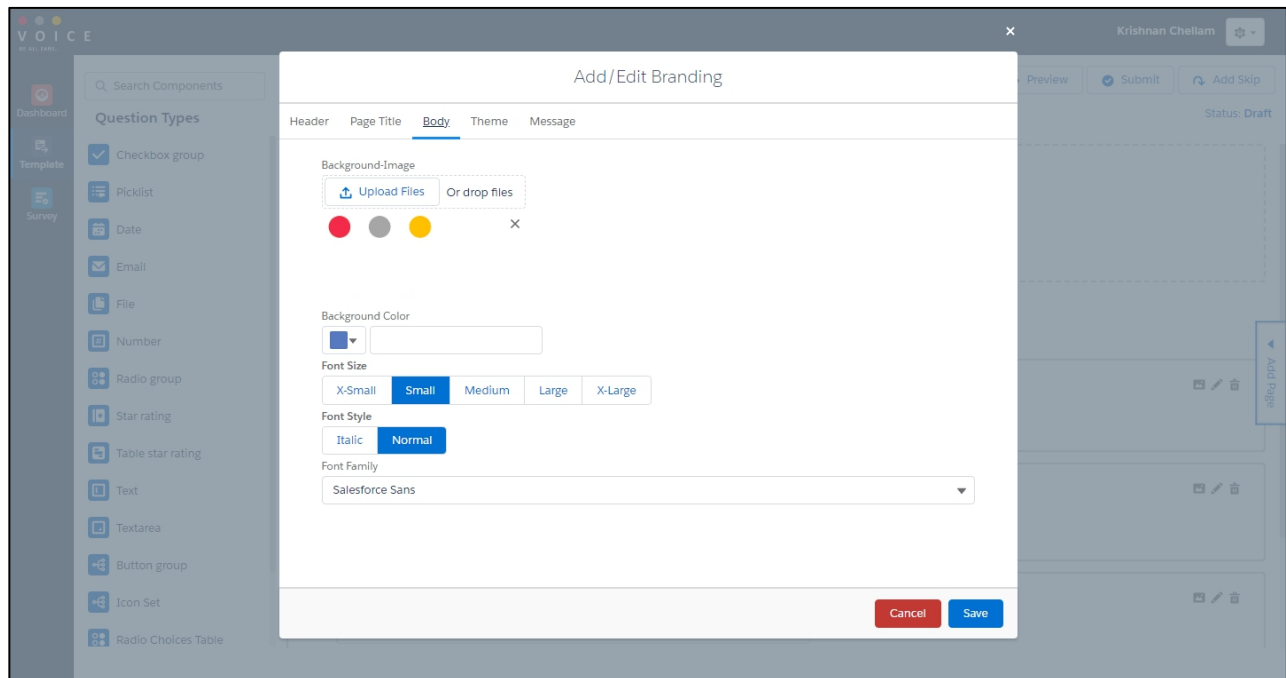
- ❖ Alignment - Align Left /Center/Right
- ❖ Font Size - Size of your header(X-Small / Small / Medium / Large / X-Large)
- ❖ Font Color - Color of the Text
- ❖ Font Weight - Bold/ Normal
- ❖ Font Style - Italic/Normal
- ❖ Font Family - Text font



iii) Body

Following can be configured under the Body tab

- ❖ Background Image - Image of the Background can be uploaded
- ❖ Background Color - Color of the font
- ❖ Font Style- Italic/Normal
- ❖ Font Family – Which type of font is required for the header



iv) Theme

This is the section where contents like questions, answers and buttons can be designed. Simply selecting a theme color will apply dual tone color scheme for the contents based on the color selected. Contents can be individually designed by using the advance setting.

Advanced Setting consists of the theme option for the following.

- ❖ Question
- ❖ Input Element
- ❖ Check boxes and Radio Element
- ❖ Navigation Element
- ❖ Button Group Element
- ❖ Option

You can add the desired font color, background color and if it is a check box or radio element you can add the selection color.

Question Types

Date

Email

File

Add/Edit Branding

Header

Page Title

Body

Theme

Message

Theme

Color

Preview

Submit

Add/Edit Branding

Header

Page Title

Body

Theme

Message

Question

Font Color

Option

Font Color

Input Element

Font Color

Background Color

Button Group Element

Font Color

Background Color

Checkbox & Radio Element

Selection Color

Selection Background Color

Navigation Element

Font Color

Background Color

Cancel

Save

iv) Message

The Message section consists of the following:

Validation Message on Save/ Next – if mandatory fields are not filled a popup message throws when going to next page or while saving.

Thank you Message – Displays once the assessment is completed.

The screenshot shows the 'Add/Edit Branding' interface with the 'Message' tab selected. The interface includes a sidebar with 'Question Types' and a main editing area. The 'Message' tab has two sections: 'Validation Message' and 'Thank You Message'. The 'Validation Message' section has a text input field with the placeholder 'Validation Message on Next/Save'. The 'Thank You Message' section has a rich text editor with a toolbar showing font settings (Salesforce Sans, size 12) and various formatting options (bold, italic, underline, link, unlink, bulleted list, numbered list, indent, outdent). At the bottom right, there are 'Cancel' and 'Save' buttons.

b) Page Title

Each page can have a different title. The page title can be added by clicking on the edit icon.

The screenshot shows the 'Add/Edit Branding' interface with the 'Page 1 Title' and 'Page 1 Content' fields highlighted. The 'Page 1 Title' field has an edit icon (pencil) next to it. The 'Page 1 Content' field also has an edit icon. The main editing area is empty, showing a dashed box with the text 'Drag and Drop the UI components here to create questions' and an 'Add Question' button. The status is 'Draft'.

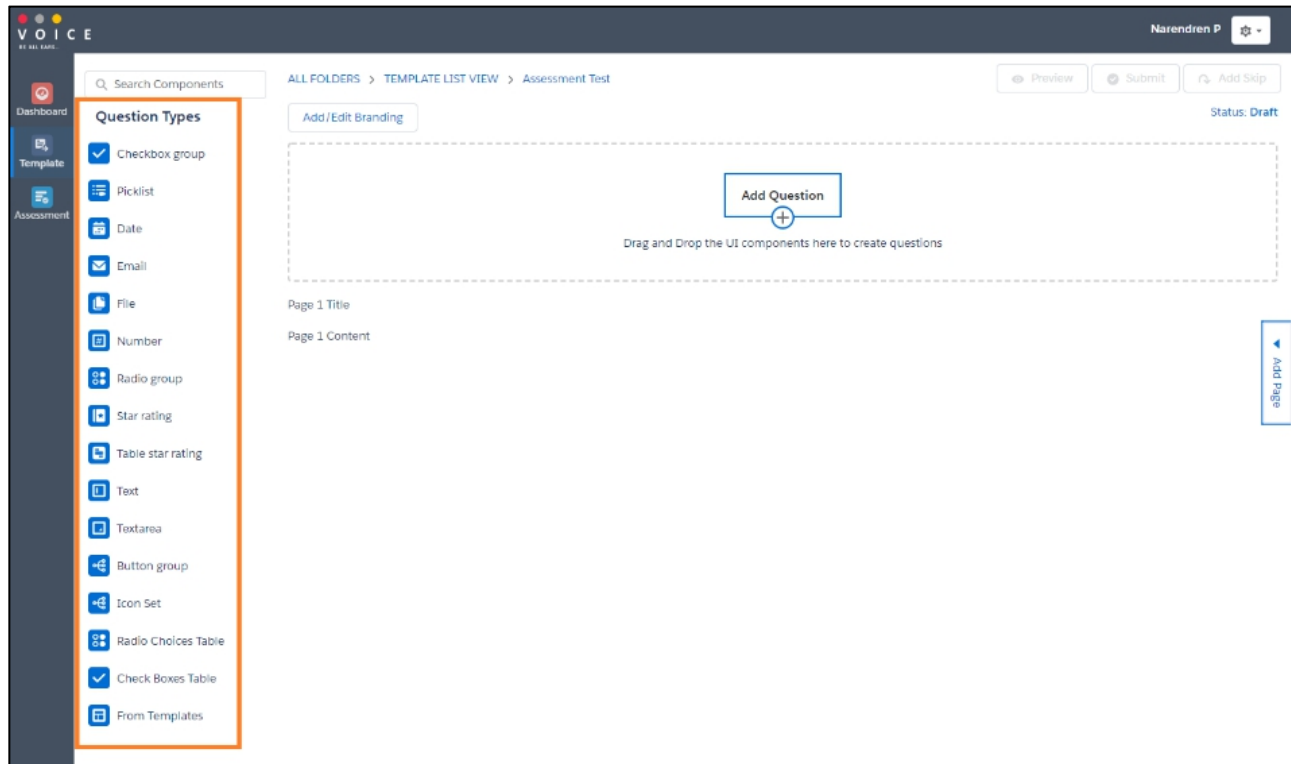
c) Page Content

Any information content for the page can be added in this section. This section would be rendered between the page title and the questions.

d) Question Types

The questions can be added to the template by clicking on the Add Question plus button in the middle panel or dragging and dropping the question element from the left panel to the center panel.

Below image shows the different types of questions that are supported.



Based on the Question types selected the question configuration popup will show different form.

It contains the following two tabs.

- ❖ Question
- ❖ Optional

Questions tab stores the mandatory information about the question type.

Optional tab has all the configurations that is optional to the question type.

VOICE Narendren P

Search Components

Question Types

- Checkbox group
- Picklist
- Date
- Email
- File
- Number
- Radio group
- Star rating
- Table star rating
- Text
- Textarea
- Button group
- Icon Set
- Radio Choices Table

Question Configuration

Question Optional

* Question Type

* Question

Options

Add Option

☐ Include Other Option

Cancel Save

Preview Submit Add Skip Status: Draft

add page

VOICE Narendren P

Search Components

Question Types

- Checkbox group
- Picklist
- Date
- Email
- File
- Number
- Radio group
- Star rating
- Table star rating
- Text
- Textarea
- Button group
- Icon Set
- Radio Choices Table

Question Configuration

Question Optional

☐ Is mandatory?

Which view would you like to display the Options?

Validation Message

Cancel Save

Preview Submit Add Skip Status: Draft

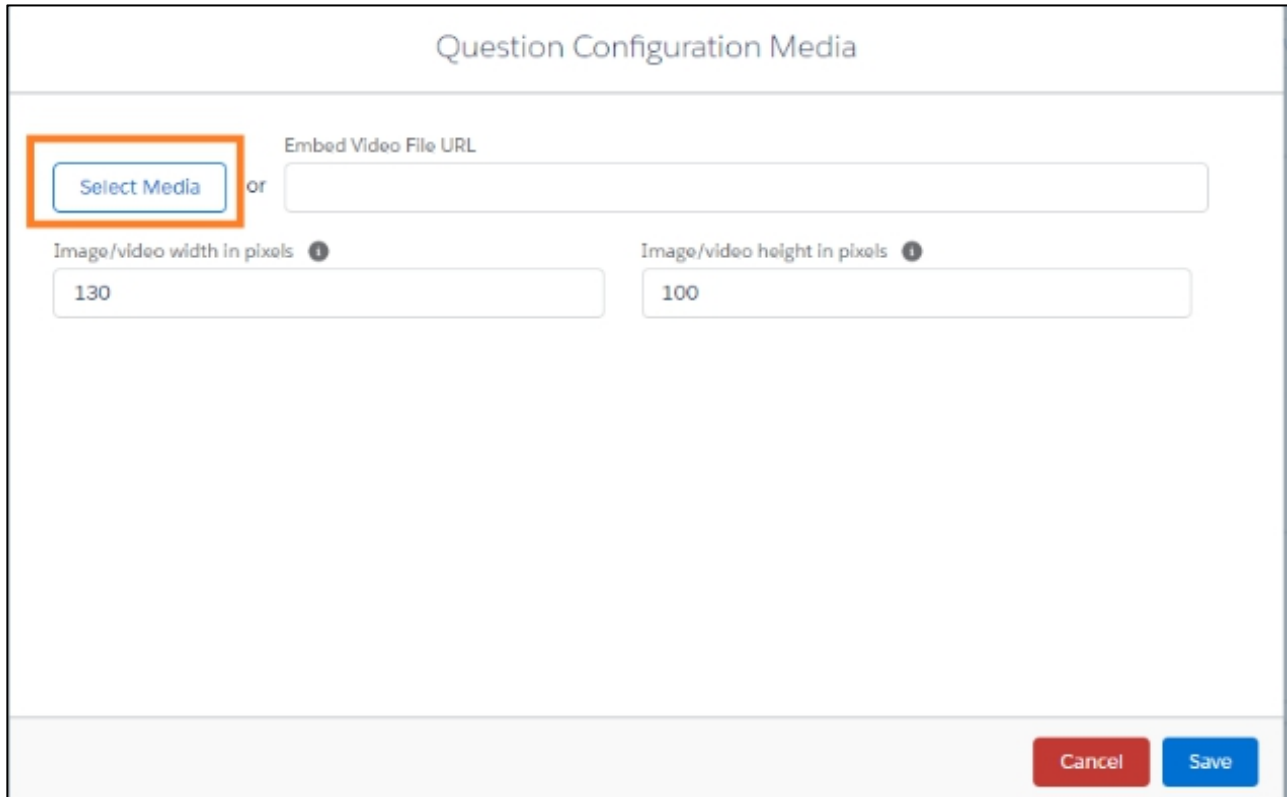
add page

Media Configuration

1] Add image – Images can be added as part of any questions by hovering on the questions in the template.



Click on Select Media button to select the image/video within Salesforce or any external video URL can be added.



The image shows a 'Question Configuration Media' form. At the top, the title 'Question Configuration Media' is centered. Below the title, there is a 'Select Media' button highlighted with an orange border. To the right of this button is the text 'or' followed by an 'Embed Video File URL' input field. Below these, there are two input fields: 'Image/video width in pixels' with the value '130' and 'Image/video height in pixels' with the value '100'. At the bottom right of the form, there are two buttons: 'Cancel' (red) and 'Save' (blue).

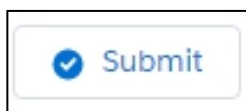
d) Preview

The template can be previewed by clicking on the Preview button at the top right section. The preview will show the end user view without the Save functionality.



e) Submit

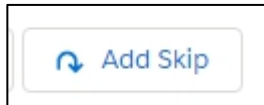
The template has to be submitted in order to use it in the assessments. The submit option is available on the top right section of the builder.



e) Skip Logic

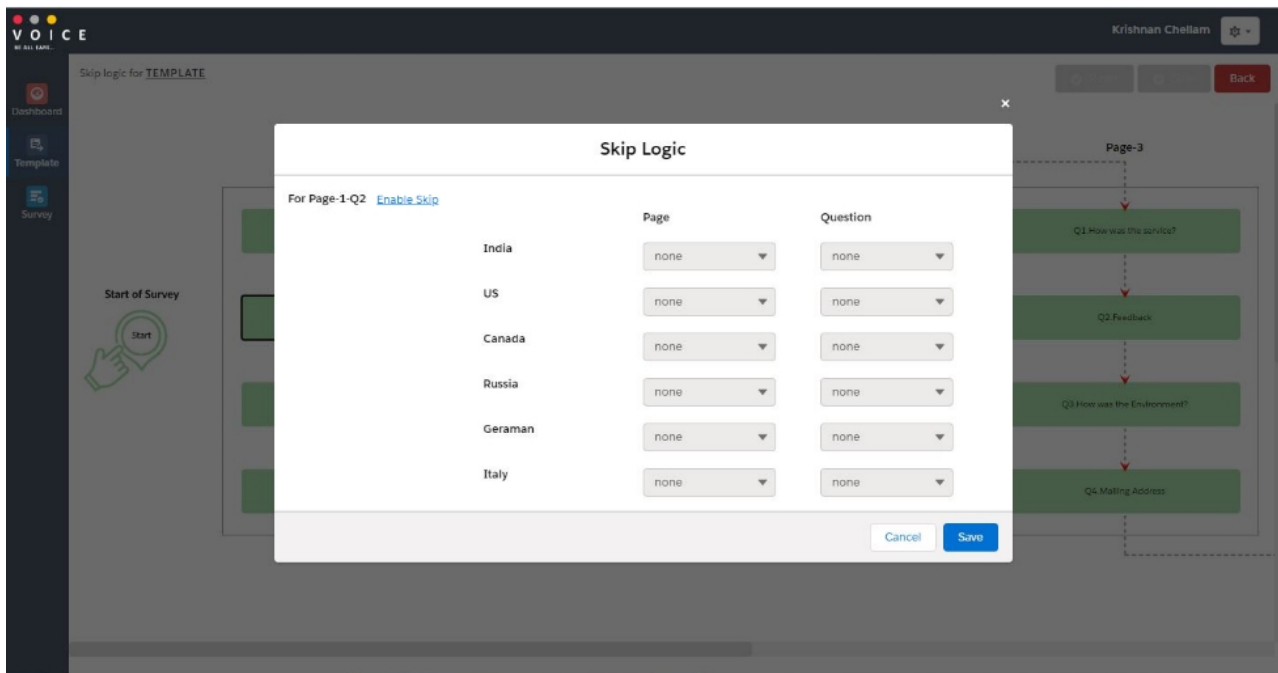
Skip Logic are used when there is a need to show or hide certain questions based on the options selected by the user.

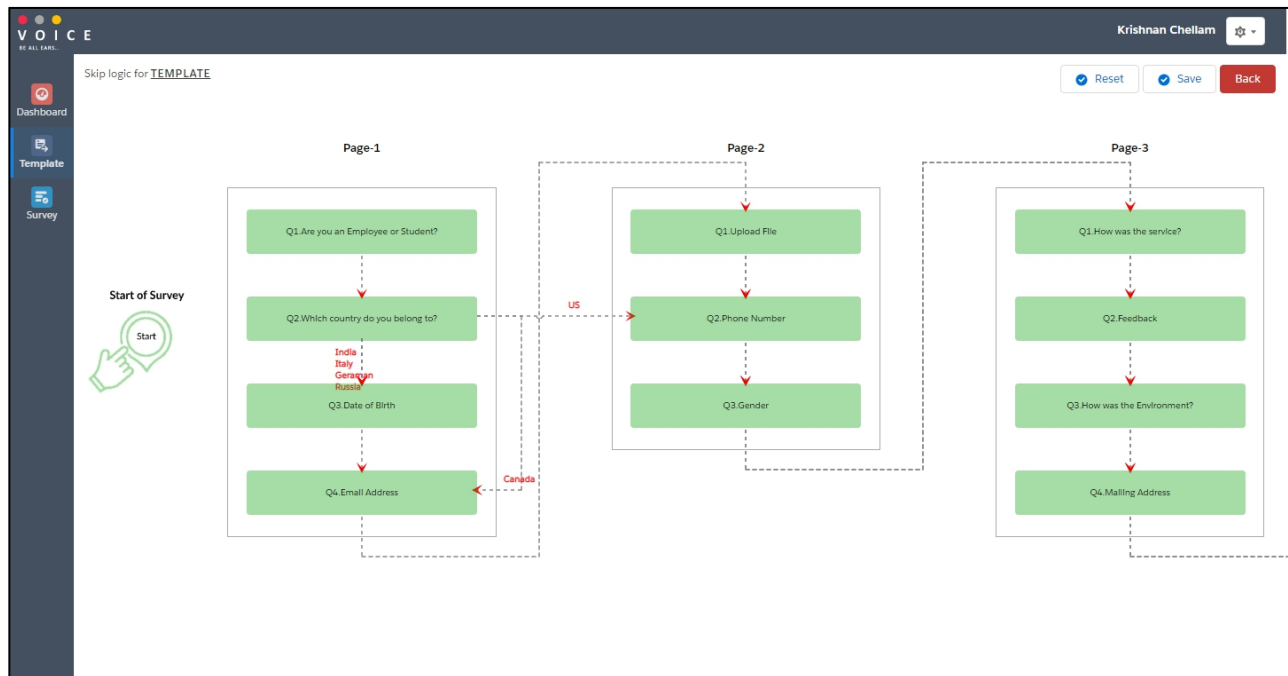
Click on the 'Add Skip' button to add the Skip logic



Skip Logic can be added only to the following Specific question Types

- ❖ Picklist
- ❖ Radio Button
- ❖ Icon Set
- ❖ Radio Choice
- ❖ Star Rating





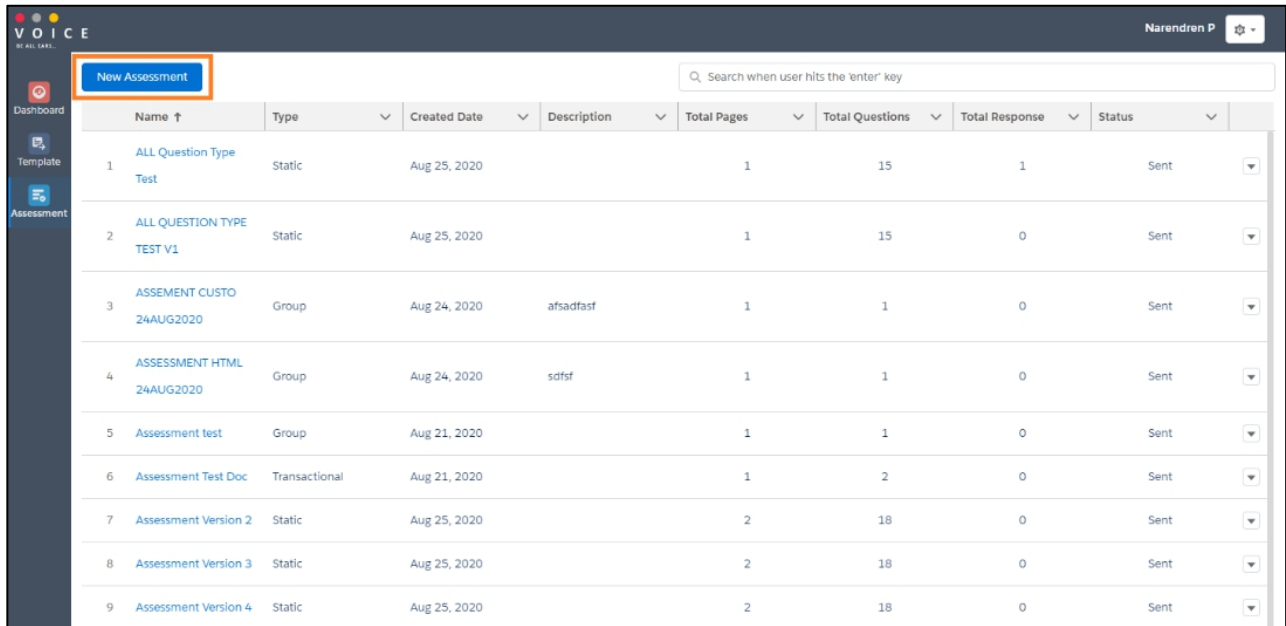
4. Assessment

This is the part where assessments would be sent to the end users using the reusable templates created earlier.

There are three types of Assessment

- ❖ Group Assessment
- ❖ Transactional Assessment
- ❖ Static Assessment

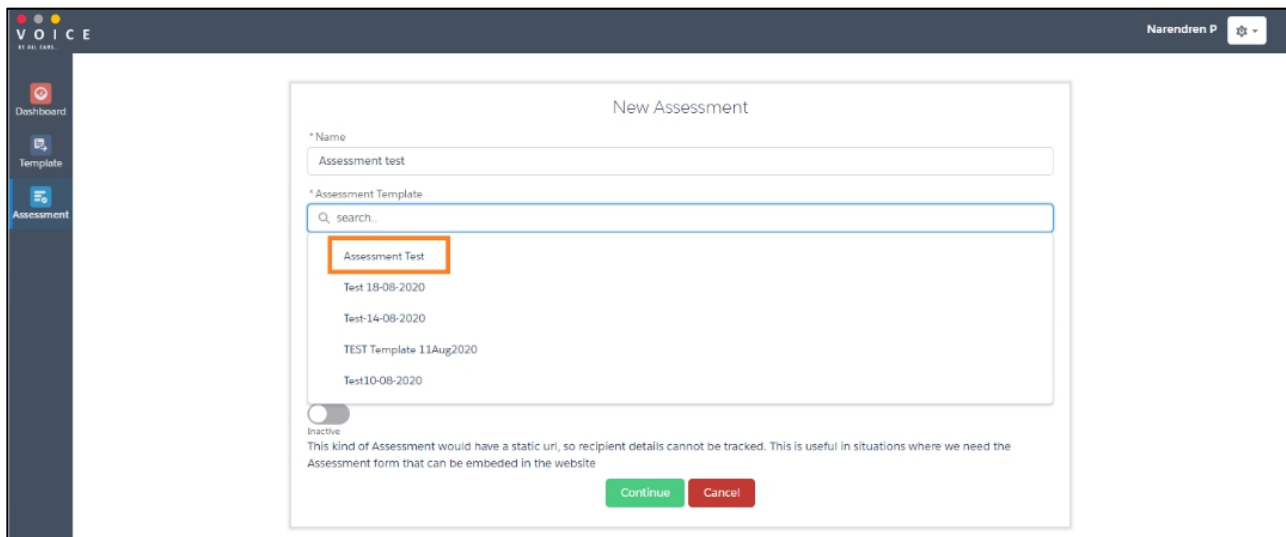
Click on New assessment Button to initiate the assessment creation process.



The screenshot shows the VOICE dashboard with a sidebar on the left containing 'Dashboard', 'Template', and 'Assessment' links. The 'Assessment' link is active. The main area displays a table of existing assessments. The 'New Assessment' button is highlighted in the top left corner of the dashboard header.

	Name ↑	Type	Created Date	Description	Total Pages	Total Questions	Total Response	Status	
1	ALL Question Type Test	Static	Aug 25, 2020		1	15	1	Sent	▼
2	ALL QUESTION TYPE TEST V1	Static	Aug 25, 2020		1	15	0	Sent	▼
3	ASSEMENT CUSTO 24AUG2020	Group	Aug 24, 2020	afsdasf	1	1	0	Sent	▼
4	ASSESSMENT HTML 24AUG2020	Group	Aug 24, 2020	sdfs	1	1	0	Sent	▼
5	Assessment test	Group	Aug 21, 2020		1	1	0	Sent	▼
6	Assessment Test Doc	Transactional	Aug 21, 2020		1	2	0	Sent	▼
7	Assessment Version 2	Static	Aug 25, 2020		2	18	0	Sent	▼
8	Assessment Version 3	Static	Aug 25, 2020		2	18	0	Sent	▼
9	Assessment Version 4	Static	Aug 25, 2020		2	18	0	Sent	▼

Fill out the assessment basic details.



The screenshot shows the 'New Assessment' form. The 'Name' field is filled with 'Assessment test'. The 'Assessment Template' dropdown menu is open, showing a search bar and a list of templates. The 'Assessment Test' template is highlighted. Below the dropdown, there is a toggle switch for 'Inactive' and a description: 'This kind of Assessment would have a static url, so recipient details cannot be tracked. This is useful in situations where we need the Assessment form that can be embedded in the website'. At the bottom, there are 'Continue' and 'Cancel' buttons.

New Assessment

* Name
Assessment test

* Assessment Template
Q search...

Assessment Test
Test 18-08-2020
Test-14-08-2020
TEST Template 11Aug2020
Test10-08-2020

☐ Inactive
This kind of Assessment would have a static url, so recipient details cannot be tracked. This is useful in situations where we need the Assessment form that can be embedded in the website

Continue Cancel

Assessment can be sent via following different ways

- ❖ Email
- ❖ SMS

Any email template can be used to send out the Assessment. The email template should have the following two merge fields in the content.

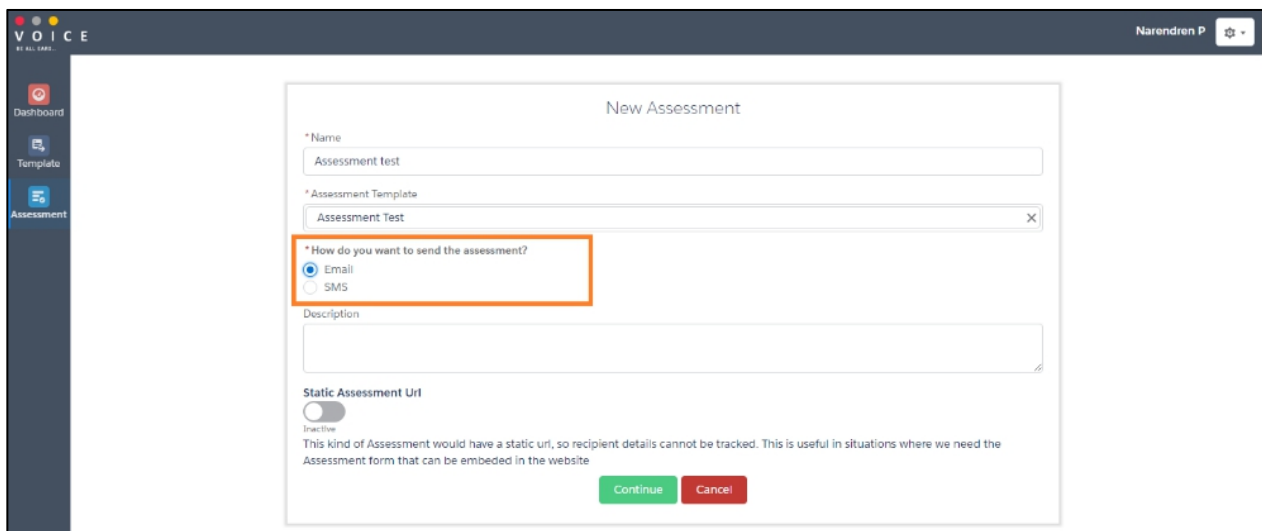
{@ASSESSMENTURL} for assessment url

{@UNSUBSCRIBE} for unsubscribe

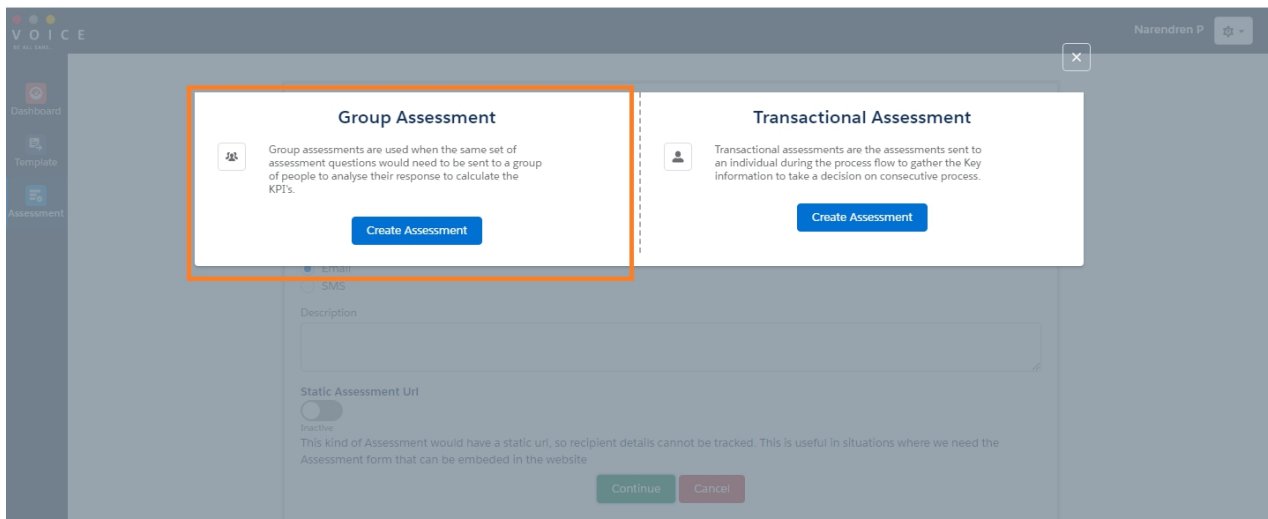
You can also add any fields in your email content using Merge fields

a) Group Assessment Using Email

Select Email and Click on Continue



Click on Create Assessment button under the Group Assessment section.



Fill out the basic details in the new assessment creation page. The template can be edited by clicking on the Edit Template button.

The screenshot shows the 'VOICE' application interface. On the left is a sidebar with 'Dashboard', 'Template', and 'Assessment' options. The top navigation bar includes 'Assessment Details' (active), 'Recipients', and 'Send'. Below this are buttons for 'Home', 'Save & Next', and 'Edit Template' (highlighted with an orange box). The main form contains the following fields:

- *Assessment Name: Text input with value 'Assessment test'.
- *Assessment Template: Dropdown menu with value 'Assessment test' and a close icon.
- From Name: Text input with value 'Balaji'.
- *From Email Address: Text input with value 'balaji.jayaraman@tekclansolutions.com' and a close icon.
- *Email Template: Dropdown menu with value 'Test Template Voice' and a close icon.
- Description: Text input with value 'Assessment Test'.

Select Create/Edit Filter to add the recipients based on the criteria given.

The screenshot shows the 'VOICE' application with the 'Recipients' tab selected. The top navigation bar now shows a green checkmark, 'Recipients' (active), and 'Send'. Below the navigation bar are buttons for 'Go Back', 'Save & Next', and 'Edit Template'. In the center, there is a 'Create/Edit Filter' button (highlighted with an orange box) and a 'Select file' button. Below these buttons is the text 'Please note that only csv files can be imported'.

The screenshot shows the 'Recipient Filter' dialog box. It has a title bar with a close icon. The dialog is divided into two sections:

STEP 1: SPECIFY OBJECT INFORMATION

- *Object Name: Search input field with a magnifying glass icon.
- *Field Name: Dropdown menu with 'Select an Option'.

STEP 2: SPECIFY FILTER CRITERIA

	Filter	Operator	Value
1	Select an Option	Select an Option	

Below the table are links: [Add Row](#), [Clear/Remove Row](#), and [Add Filter Logic](#). At the bottom right are 'Cancel' and 'Save' buttons.

Enter the Object information for which the assessment has to be sent.

The screenshot shows the 'Recipient Filter' dialog box in the VOICE application. The dialog is titled 'Recipient Filter' and has a 'Send' button in the top right corner. It is divided into two steps: 'STEP 1: SPECIFY OBJECT INFORMATION' and 'STEP 2: SPECIFY FILTER CRITERIA'. In Step 1, the 'Object Name' is set to 'Contact' and the 'Field Name' is set to 'Select an Option'. In Step 2, the filter criteria are defined: 'Filter' is 'Last Name', 'Operator' is 'contains', and 'Value' is 'Jamuna'. The 'Add Row' and 'Clear/Remove Row' buttons are visible below the filter criteria. The 'Cancel' and 'Save' buttons are at the bottom right.

Recipient Filter

STEP 1: SPECIFY OBJECT INFORMATION

* Object Name
Contact

* Field Name
Select an Option

STEP 2: SPECIFY FILTER CRITERIA

1 Filter: Last Name Operator: contains Value: Jamuna

[Add Row](#) [Clear/Remove Row](#)
[Add Filter Logic...](#)

Cancel Save

Enter the filter criteria and Click Save

The screenshot shows the 'Recipient Filter' dialog box in the VOICE application. The dialog is titled 'Recipient Filter' and has a 'Send' button in the top right corner. It is divided into two steps: 'STEP 1: SPECIFY OBJECT INFORMATION' and 'STEP 2: SPECIFY FILTER CRITERIA'. In Step 1, the 'Object Name' is set to 'Contact' and the 'Field Name' is set to 'Email'. In Step 2, the filter criteria are defined: 'Filter' is 'Last Name', 'Operator' is 'equals', and 'Value' is 'Jamuna'. The 'Add Row' and 'Clear/Remove Row' buttons are visible below the filter criteria. The 'Cancel' and 'Save' buttons are at the bottom right.

Recipient Filter

STEP 1: SPECIFY OBJECT INFORMATION

* Object Name
Contact

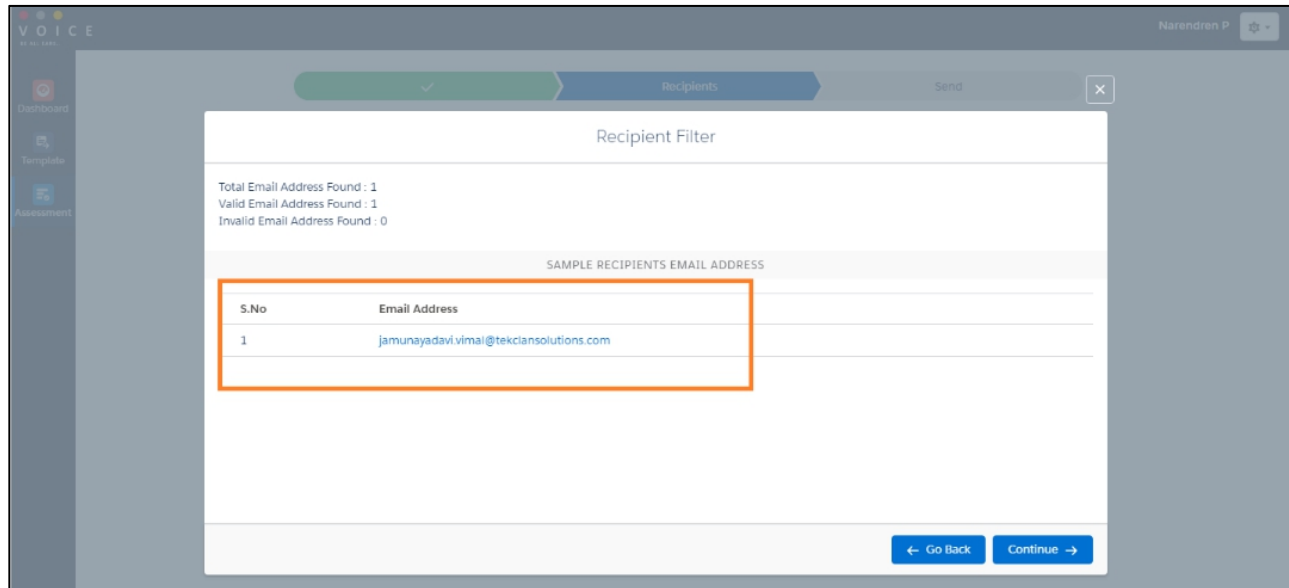
* Field Name
Email

STEP 2: SPECIFY FILTER CRITERIA

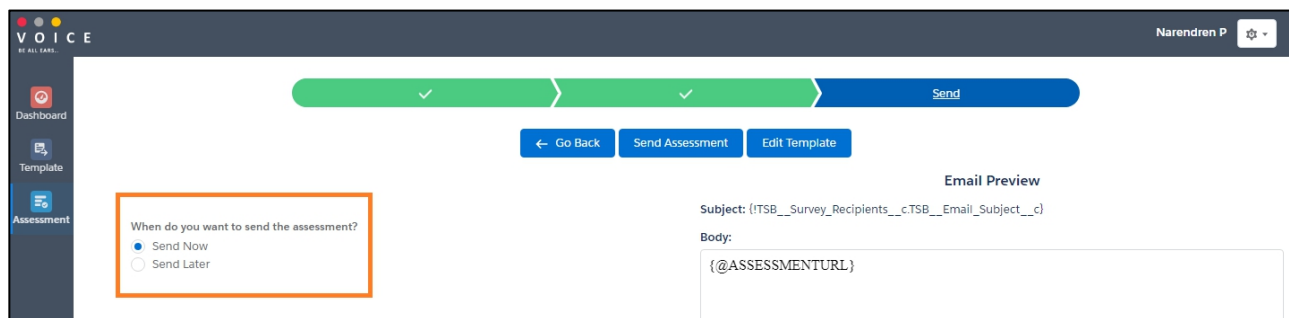
1 Filter: Last Name Operator: equals Value: Jamuna

[Add Row](#) [Clear/Remove Row](#)
[Add Filter Logic...](#)

Cancel Save



Clicking on continue will take to the final page where assessment can be triggered.



b) Group Assessment Using SMS

The assessment creation flow remains the same for SMS as that of Email flow, except the SMS message content can be edited within the application.

c) Transactional Assessment Using Email

Transactional Assessment are assessment which would be triggered based on the action performed in the record.

Assessment responses related list has to be added to the respective page layouts in order to see the response received for the particular record.

Clicking on save will save the assessment in the background and initiate the assessment emails.

Generate Link button should be used in Transactional or Static type assessments to gather the assessment link. This url will be used in the email templates to send to the recipients.



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ASSESSMENT LIST VIEW > Assessment Test Doc

Edit Template Download CSV **Generate Link**

Assessment Link

<https://teckclan-surveyde-form-developer-edition.na85.force.com/voice?assessmentid=a081U00000JXrJZQA1&id=<u>>

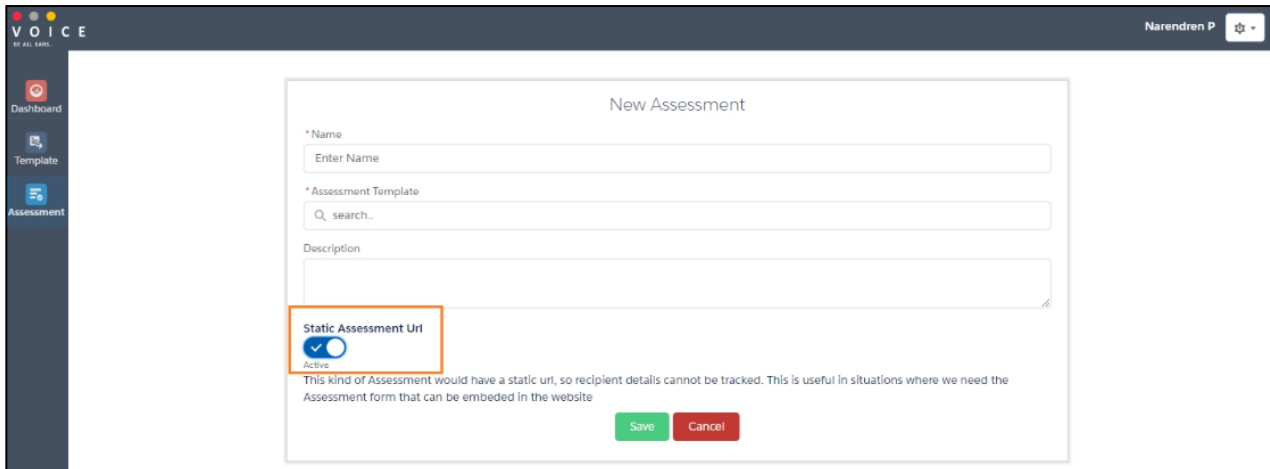
Copy

Please use the above url to use in the transaction

Replace the recordId string in the url with your object record Id to store the response against that particular object.

d) Static Assessment URL

Click on Static Assessment URL toggle to generate the static url for the assessment. This static url can be forwarded to the users to fill out the assessment. In this type of assessment the responses won't store the user details when they fill out the assessment.



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Dashboard Template Assessment

New Assessment

* Name
Enter Name

* Assessment Template
Q search...

Description

Static Assessment Url
☒ Active

This kind of Assessment would have a static url, so recipient details cannot be tracked. This is useful in situations where we need the Assessment form that can be embedded in the website

Save Cancel