



Salesforce Managed Package Installation Guide v1.37

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1. Introduction

InMoment's Wootric Managed Package contains custom objects, classes, triggers, unit tests and Visualforce pages that enable InMoment NPS, CSAT and CES survey data to be stored and displayed on Customer's Salesforce Org.

Once the custom objects and code have been installed, customer specific NPS data can be inserted into the Salesforce Org using the Salesforce REST API.

For the REST API to be used, the InMoment Connected App must be given access and rights to the customer Org, so the connection between InMoment and the customer can be created.

Implementing the InMoment Managed Package App requires three steps:

1. Create a InMoment account by requesting a free trial on [the InMoment website](#).
2. [Contact](#) InMoment to enable a trial of the Salesforce integration in your account.
3. Install the InMoment (Wootric) Managed Package App (see below).

2. What's new in version 1.37

- Support for Lead and Marketing Cloud -- you can now see NPS, CSAT and CES scores for Lead object.
- New reports for Account-- Monthly and Quarterly NPS, monthly and quarterly average CSAT, and monthly and quarterly average CES
- New custom fields for Account to hold current month, previous month, current quarter and previous quarter NPS, CSAT and CES data

▼ New Wootric Account Custom Fields

Current Month NPS	-100	Current Quarter NPS	-100.00
Current Month Average CES	0.00	Current Quarter Average CES	
Current Month Average CSAT	0.00	Current Quarter Average CSAT	
Current Month Calculation Date	1/15/2018 3:06 PM	Current Quarter Calculation Date	1/15/2018 12:15 AM
Previous Month NPS		Previous Quarter NPS	-20.00
Previous Month Average CES		Previous Quarter Average CSAT	
Previous Month Average CSAT		Previous Quarter Average CES	
Previous Month Calculation Date	1/14/2018 3:06 PM	Previous Quarter Calculation Date	1/14/2018 9:14 PM

- New custom fields to hold latest NPS, CSAT and CES score and feedback. These can also be used to integrate data with other vendors that InMoment does not support directly.

▼ Wootric Contact Custom Fields

Current NPS	2	Current NPS Feedback	More bad score
Promoter Level	Detractor	Current CES Feedback	
NPS % change	-33.33%	Current CSAT Feedback	
Previous NPS	3	Current Metric Type	NPS
Current CES		Last Decline Date	3/3/2017 7:27 AM
Current CSAT		Previous CES	
Last Response Date	1/14/2018 1:20 PM	Previous CSAT	
Languages		Level	

3. Upgrade Instructions

This new version (v1.37) has new custom fields and new scheduled jobs to do account level calculation. Our recommendation is that you uninstall previous package so that it deletes pre-existing scheduled jobs from InMoment. Salesforce does not allow to create new scheduled job if one exists already. However if you are an expert Salesforce admin, you can do upgrade and create the scheduled jobs manually -- one for quarterly calculation which runs once a day and other for monthly calculation which runs every hour.

If you find that schedulers are not updating custom fields for Account object then it's likely some permission issue. You can solve this by manually adding following jobs. The job names should be one or more of following and each of these leverages a scheduler class **AccountsNPSFieldScheduler**:

```
'WootricAccountsQuarterlyNPSJob'
'WootricAccountsQuarterlyCESJob'
'WootricAccountsQuarterlyCSATJob'
'WootricAccountsMonthlyNPSJob'
'WootricAccountsMonthlyCESJob'
'WootricAccountsMonthlyCSATJob'
```

4. Installation Prerequisite

- a. InMoment Account with admin role. [Request a trial account.](#)
- b. Salesforce:Salesforce Developer or Enterprise or Performance Edition with admin role.

5. Installation Overview

The latest version of the InMoment (Wootric) Managed Package can be downloaded from App Exchange and installed into a customer's Salesforce Org using this URL.

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EhHwUAF>

6. Installation Steps

6.1. Access Rights

The installation page will display the possible access rights for your Users. "Install for All Users" would be the most common installation selection.

Install Wootric NPS By Wootric, Inc.



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
Wootric NPS	Wootric, Inc.	20160927.1	1.0 (Beta 2)

Description

Add Wootric's Net Promoter Score information to your Salesforce Aloha account

Additional Details [View Components](#)

Figure 1 – Access Rights

6.2. Install

Install Wootric NPS By Wootric, Inc.

 **Installing and granting access to all Users...**

App Name	Publisher	Version Name	Version Number
Wootric NPS	Wootric, Inc.	20160927.1	1.0 (Beta 2)

Description

Add Wootric's Net Promoter Score information to your Salesforce Aloha account

Additional Details [View Components](#)

Figure 2 – Installation Steps

6.3. Completed

Once installed click the completed button to start setting up your InMoment (Wootric) NPS components.

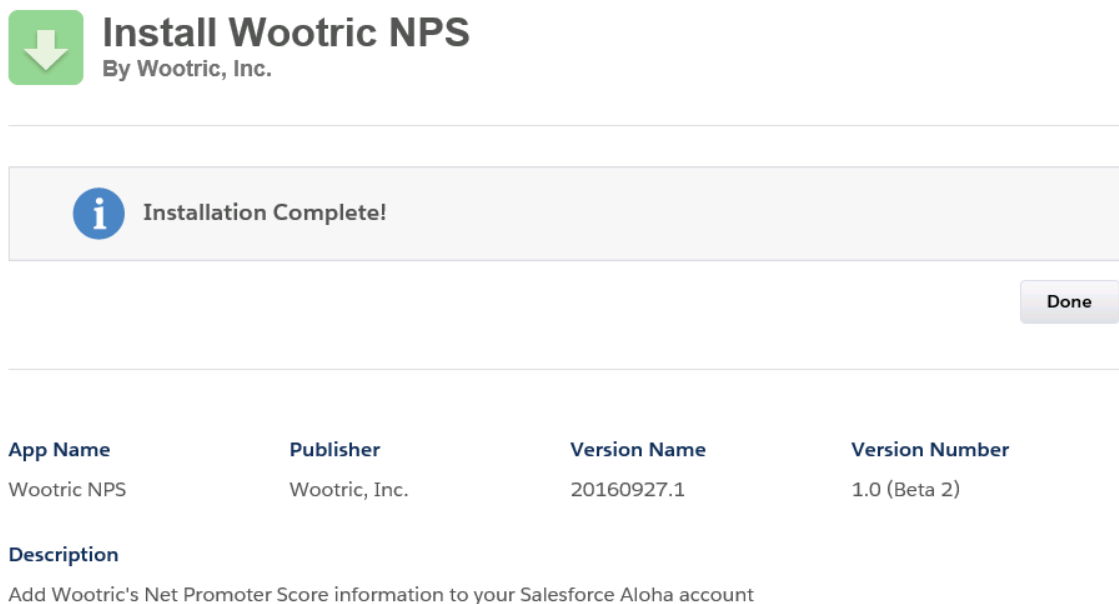


Figure 3 – Installation Steps

6.4. Turn on integration in your InMoment Dashboard

- Go to https://app.wootric.com/account_settings/edit
- Select Integrations->Send Data> Salesforce
- Click on 'set up'
- Click Connect to Salesforce and follow the prompt.
- On successful connection, InMoment will start sending your pre-existing i.e historical customer feedbacks to Salesforce in background for known contacts i.e customers who already belong to an account on your Salesforce. This process may take 5 minutes to longer depending on number of historical responses you have as well as based on load on your Salesforce org.
- New feedback will be sent in near real time as they come.

6.5. InMoment Default Account for Unknown Contacts

During the Wootric NPS Salesforce Package installation process, a new Account called “**Wootric Unknown Contacts**” account should have been created. This account is used by InMoment to create all unknown Contacts and their NPS scores to, if no other Contact within your Org can be identified.

As many Salesforce Orgs are set up differently, there are times when the **Wootric Unknown Account** may not have been created, due to configuration workflow or required field requirements.

To make sure the Wootric Account is in your Salesforce Org, search for the “Wootric Unknown Contacts” Account.

Search Results

If no account can be found, or you wish to change the default Account that “Wootric Unknown Contacts” are created under, then

Find the account you would like the “Wootric Unknown Contacts” to be created under,
or create a new Account and name it whatever you like.

Once created, click “Edit Layout” on the top right of the Account page

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) ?

Find the Wootric “External Id” field.

And drag it onto the Account Layout.

Save the layout change. It'll look like the screenshot below.

Account Detail

Standard Buttons

[Edit](#) [Change Owner](#) [Change Record Type](#) [Delete](#) [Sharing](#) [Include Offline](#) [Disable Customer Ac](#)

Account Information (Header visible on edit only)

Account Owner	Sample User	Phone	1-415-555-1212
* Account Name	Sample Account Name	Fax	1-415-555-1212
Parent Account	Sample Account	Website	www.salesforce.com
* Test Required Field	Sample Test Required Field	External Id	Sample External Id

Additional Information

Double click on the new External Id Field, and enter this ID: 0000000001

[Contacts](#) | [Open Activities](#) | [Activity History](#) | [Opportunities](#) | [Cases](#) | [Partners](#) | [Notes & Attachments](#)
Account Detail
[Save](#) [Cancel](#)

Account Owner	Package Demo [Change]	Phone	
Account Name	Wootric [View Hierarchy]	Fax	
Parent Account		Website	
Test Required Field	Test	External Id	0000000001

Save the Account.

The unique ID: 0000000001 will be used by Wootric to find the correct Account to save the Unknown Contacts to.

You are now able to remove the External Id field from the Account Layout, as it is now populated and no longer required to be displayed.

7. Contact Layout

The Salesforce Contacts Object has been updated with some custom Wootric fields and a Visualforce related list.

These fields and Related List must be added to the existing Contact Page Layout for them to be seen.

7.1. Edit Layout

To add the new InMoment NPS fields and Related List to the Contact Layout, navigate to an existing Contact, and select "Edit Layout" from the top right corner of the Contact information section.

The screenshot shows the Salesforce interface for a contact named Mr. Tim Barr. At the top, there's a header with the name and social media icons. Below that, a navigation bar includes links like 'Customize Page', 'Edit Layout' (highlighted with a yellow box), 'Printable View', and 'Help for this Page'. The main content area shows a 'Hide Feed' button and a 'Click to add topics' dropdown. At the bottom, there's a 'Post' section with a text input field and a 'Share' button. The 'Edit Layout' button is the key element being pointed out for the user to click.

Figure 4 – Edit Contact Layout

Or navigate to the Contact Page Layout page within Setup – Build – Customize – Contacts – Page Layouts. And select the Page Layout you wish to add the Wootric NPS fields to.

Page Layout Assignment
Contact

The table below shows the page layout assignments for different profiles.

Profiles	Page Layout
Analytics Cloud Integration User	Contact Layout
Analytics Cloud Security User	Contact Layout
Authenticated Website	Contact Layout
Authenticated Website	Contact Layout
Chatter External User	Contact Layout
Chatter Free User	Contact Layout
Chatter Moderator User	Contact Layout
Contract Manager	Contact Layout
Cross Org Data Proxy User	Contact Layout
Custom: Marketing Profile	Contact (Marketing) Layout
Custom: Sales Profile	Contact (Sales) Layout
Custom: Support Profile	Contact (Support) Layout
Customer Community Login User	Contact Layout
Customer Community Plus Login User	Contact Layout
Customer Community Plus User	Contact Layout
Customer Community User	Contact Layout
Customer Portal Manager Custom	Contact Layout
Customer Portal Manager Standard	Contact Layout
External Identity User	Contact Layout
Force.com - App Subscription User	Contact Layout
Force.com - Free User	Contact Layout
Gold Partner User	Contact Layout
High Volume Customer Portal	Contact Layout
High Volume Customer Portal User	Contact Layout

7.2. Add Wootric Sections

In Page Layout Edit mode, drag the “Section” icon listed under Field to a point on the Contact page you wish to show the NPS fields.

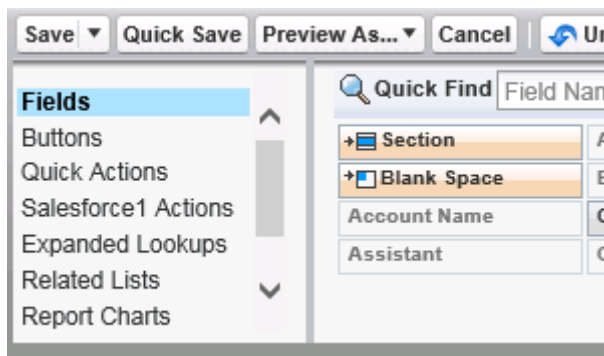


Figure 5 – Add Section

Label the new Section “Wootric Net Promoter Score Information”, and make it a two column section.

Section Properties

Section Name: Wootric Net Promoter Score

Display Section Header On: ☒ Detail Page ☒ Edit Page

Layout

☐ 1-Column ☒ 2-Column

Tab-key Order

☒ Left-Right ☐ Top-Down

OK Cancel

Figure 6 – Section 1 Properties

Repeat the process again, adding a 2nd section to the Contact Page Layout, placing the section below the first.

This time give the section the name of “Net Promoter Score Feedback”, but make this Section only 1-Column.

Section Properties

Section Name: Net Promoter Score Feedback

Display Section Header On: ☒ Detail Page ☒ Edit Page

Layout

☒ 1-Column ☐ 2-Column

OK Cancel

Figure 7 – Section 2 Properties

7.3. Add Wootric Custom Fields

Still in Page Layout Edit Mode, look for the NPS fields name “NPS % change” “Previous NPS score”, “Current NPS score”, “Last response Date” and “Last Decline Date”.

Drag each one of these fields down and arrange them within the 1st Section “Wootric Net Promoter Score Information”. There are other fields which you choose to add as well.

Wootric Contact	
Current CES score ⓘ	Last Response Date ⓘ
6	5/15/2017 1:45 PM
Current NPS score ⓘ	Last Decline Date ⓘ
2	2/21/2017 7:59 AM
Current CSAT score ⓘ	Promoter Level ⓘ
	Detractor

Figure 8 – Contact Fields

7.4. Add Custom Related List (Visualforce Page)

While in Page Layout Editor, scroll down to Visualforce Pages, and drag the “Contact” item onto the 2nd single column “Contact Survey Feedback” section. For Lightning View, use “Contact Survey Feedback for Lightning”.

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Actions
Salesforce1 Actions
Expanded Lookups
Related Lists
Report Charts
Components
Visualforce Pages

Quick Find Page Name *

+ Section
Blank Space
ContactNPSFeedback

Wootric Net Promoter Score Information (Header visible on detail only)

Current NPS score	96	NPS % change	359.11%
Previous NPS score	28	Last Response Date	26/09/2016 9:02 PM
Promoter Level	Sample Promoter Level	Last Decline Date	26/09/2016 9:02 PM

Net Promoter Score Feedback (Header visible on detail only)

vr ContactNPSFeedback

Figure 9 – Add Contact Related List

Now close the Page Layout Editor by clicking the “Save” button.

When you view a Contact, you will now see the two sections that have just been added.

▼ Wootric Net Promoter Score Information					
Current NPS score 📊			NPS % change 📊 0.00%		
Previous NPS score 📊			Last Response Date 📅		
Promoter Level			Last Decline Date 📅		
▼ Net Promoter Score Feedback					
No records found					
Date	ID	Score	Promoter Level	Feedback	Status
Total Records Found:0; ⏪ Previous Page Next Page ⏩					

Figure 10 – Contact Related List

8. Account Layout

The Account layout is edited in a similar way as the Contact Layout.

8.1. Edit Layout

To add the new Wootric NPS fields and Related List to the Account Layout, navigate to an **existing** Account, and select “Edit Layout” from the top right corner of the Account information section.

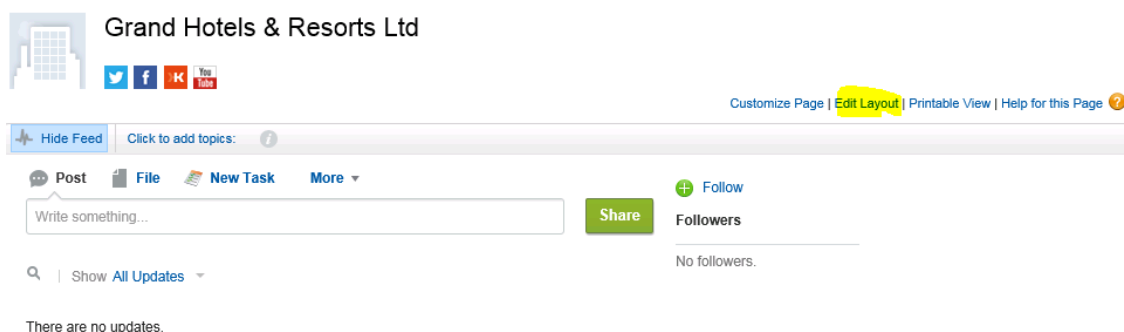


Figure 11 – Edit Account Layout

Or navigate to the Contact Page Layout page within Admin Setup – Build – Customize – Accounts – Page Layouts. And select the Page Layout you wish to add the Wootric NPS fields to.

8.2. Add InMoment (Wootric) Section

In Page Layout Edit mode, drag the “Section” icon listed under Field to a point on the Account page you wish to show the NPS Related List.

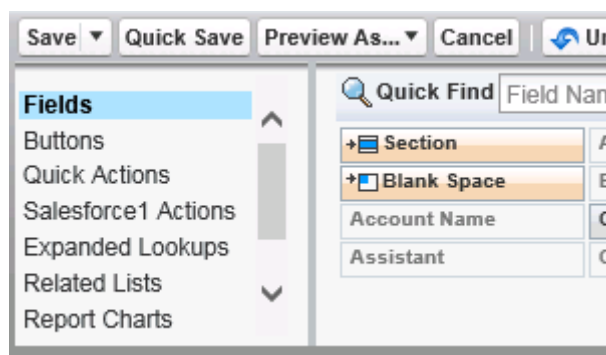


Figure 12 – Account Section

Label the new Section “Net Promoter Score Feedback”, and make it a single 1-column section.

8.3. Add Custom Related List (Visualforce Page)

In the Page Layout Editor menu, scroll down to Visualforce Pages, and drag the “Account Survey Feedback” item onto the single column “Net Promoter Score Feedback” section. For Lightning, drag “Account Survey Feedback for Lightning” instead.

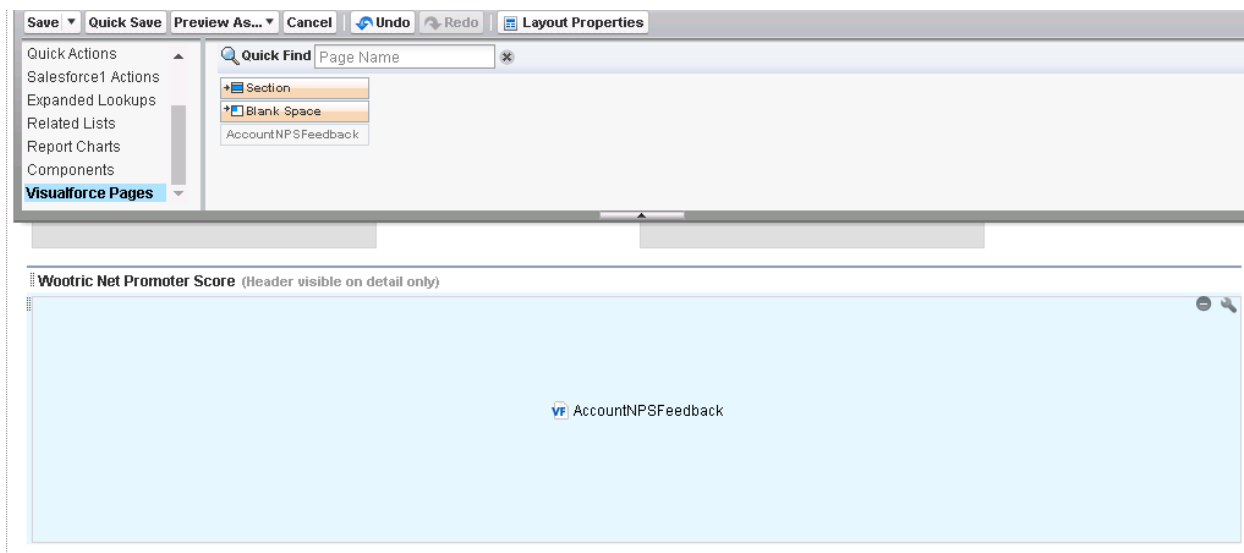


Figure 13 – Add Account Related List

Once the Visualforce Page has been dragged down onto the Account page, click the small spanner icon on the top right of the Visualforce “AccountNPSFeedback” section.

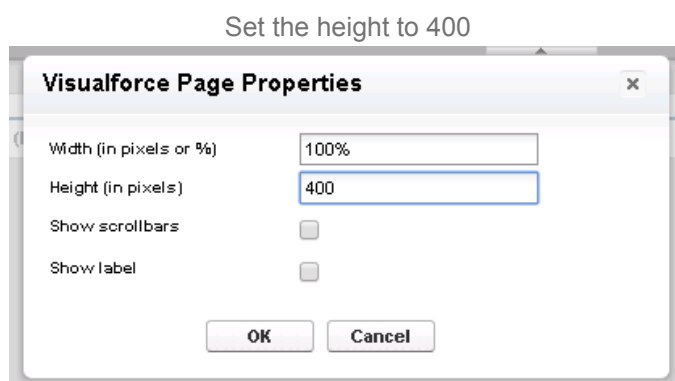


Figure 14 – Set Related List Height

Click on, and now close the Page Layout Editor by clicking the “Save” button.

When you view an Account, you will now see the section that have just been added.

▼ Net Promoter Score Feedback					
No records found					
Date	Contact	ID	Score	Promoter Level	Feedback
Total Records Found:0; < Previous Page Next Page >					

Figure 15 – Account Related List

9. Customization of Related Lists (OPTIONAL)

9.1. Custom Settings

The Wootric Managed Package installs a “List” custom setting that can be used to determine the information that is displayed on the Contact NPS and Account NPS related lists.

This allows the Salesforce Administrator to customize the related list data for the entire Org, or for individual Users and Profiles which corresponds to **Segments and Filters on InMoment**.

As the customer may have their own custom data stored within InMoment NPS database in form of **Segments and Filters**, this Salesforce Custom Setting can enable the display and labelling of the custom data.

You are able to edit the default custom setting to select which custom property should be made visible on the Contact and Account NPS Related lists, and also customize the heading of the Custom Property that will be displayed.

9.2. Customizing the Defaults.

Navigate to the Salesforce Administration area using the “Setup” link on the top right of Salesforce page.

Then with menu items on the left side, navigate to Build – Develop – Manage Your Custom Settings.

Click on “Manage” next to the “Custom Grid Columns” setting.

Quick Find / Search...

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

Lightning Experience

Salesforce1 Quick Start

Force.com Home

Administer

- ▶ Manage Users
- ▶ Manage Apps
- ▶ Manage Territories

Custom Settings

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings are stored in the Salesforce database and can be used in Visualforce, Apex, and the Force.com Web Services API.

Percentage of custom settings data used: 0%
You are currently using 0 MB of custom settings data in your organization, out of an allowed limit of 2 MB.

View: All ▼ [Create New View](#)

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description
Edit Del Manage	Custom Grid Columns	Public	List	Wootric	Custom setting to al

Figure 16 – Custom Setting

9.3. Edit Default Settings

To edit the default settings for the Organization, click the Edit Link.

Here you are able to rename the labels for any custom property that exists within the InMoment NPS database, and which custom property or Wootric NPS column should be displayed within the Contact and Account Related Lists.

Note: Some Wootric Related List columns are not customizable, and will always be displayed.

Custom Grid Columns Edit

Provide values for the fields you created. This data is cached with the application.

Edit Custom Grid Columns

Save
Save & New
Cancel

Custom Grid Columns Information

Name

Default

Column Channel Visible

☒

Column Date Visible

☒

Column Feedback Visible

☒

Column Type Visible

☒

Property 10 Label

Label 10

Property 10 Visibility

☐

Property 1 Label

Label 1

Property 1 Visibility

☐

Property 2 Label

Label 2

Property 2 Visibility

☐

Property 3 Label

Label 3

Property 3 Visibility

☐

Property 4 Label

Label 4

Property 4 Visibility

☐

Property 5 Label

Label 5

Property 5 Visibility

☐

Property 6 Label

Label 6

Property 6 Visibility

☐

Property 7 Label

Label 7

Property 7 Visibility

☐

Property 8 Label

Label 8

Property 8 Visibility

☐

Property 9 Label

Label 9

Property 9 Visibility

☐

Figure 17 – Change Default Organization Settings

Custom Grid Columns Detail

[Back to List](#)

Edit			
Name	Default	Column Channel Visible	
Column Date Visible	☒	Column Feedback Visible	☒
Column Type Visible	☒	Property 10 Label	Label 10
Property 10 Visibility	☐	Property 1 Label	Label 1
Property 1 Visibility	☐	Property 2 Label	Label 2
Property 2 Visibility	☐	Property 3 Label	Label 3
Property 3 Visibility	☐	Property 4 Label	Label 4
Property 4 Visibility	☐	Property 5 Label	Label 5
Property 5 Visibility	☐	Property 6 Label	Label 6
Property 6 Visibility	☐	Property 7 Label	Label 7
Property 7 Visibility	☐	Property 8 Label	Label 8
Property 8 Visibility	☐	Property 9 Label	Label 9
Property 9 Visibility	☐		

Figure 18 – Default Organization Settings

9.4. Configuring the InMoment (Wootric) Account Name (Recommended)

Map one of the properties to “__wootric_account_name”. This is a special property that will hold the name of the InMoment account that the response belongs to, so you can easily identify where the response is coming from when you have multiple accounts connected to Salesforce.

It's recommended that you set this up from day 1, even if you only have one InMoment account, so that the account name is visible for all of your responses.

10. Adding charts on Account Layout (Optional)

10.1. Adding Report Charts

The InMoment (Wootric) Managed Package installs a range of NPS Reports that can be used for a Dashboard or for displaying on the Account Layout.

To add a Report chart, edit the Account Layout by adding a new section and call it something like “Account NPS Levels”, with a 2-Column layout.

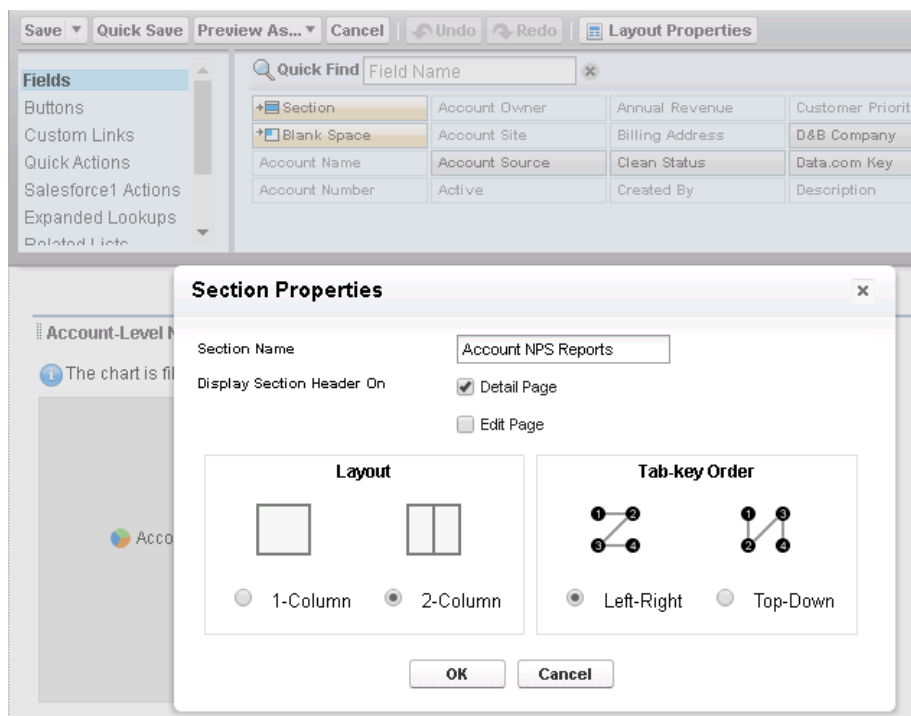


Figure 19 – New Account Layout Section

Then drag down the Report Chart “Account NPS Level This Month” into one side of the new Section, and then drag the Report Chart “Account NPS Level This Month” into the other side of the new Section.

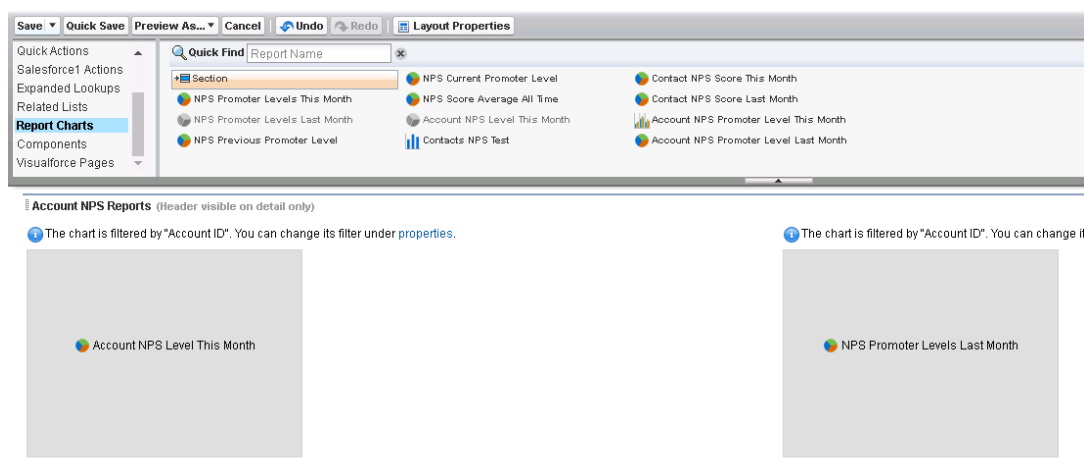


Figure 20 – Add Reports to Layout Section

Save and close the Account Layout.

11. Reports & Dashboard

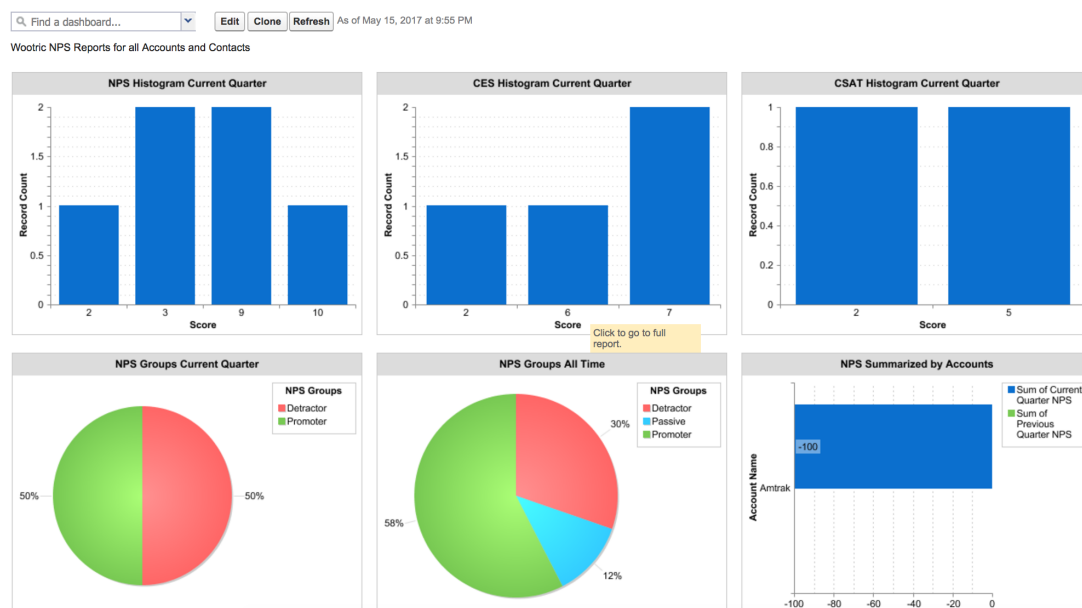
The InMoment (Wootric) managed package comes with thirteen (13) different reports grouped into two dashboards.

Wootric NPS Reports (Installed Package: Wootric NPS)

Action	Name	Folder	Created By
	CES Score histogram for this month for the entire org adjustable by time range and other fields	Wootric NPS Reports	jha_prabhat
	CSAT Histogram Current Quarter	Wootric NPS Reports	jha_prabhat
	NPS Average Score Last Month	Wootric NPS Reports	jha_prabhat
	NPS Average Score This Month	Wootric NPS Reports	jha_prabhat
	NPS Avg Score Light	Wootric NPS Reports	jha_prabhat
	NPS Groups All Time	Wootric NPS Reports	jha_prabhat
	NPS Groups Current Quarter	Wootric NPS Reports	jha_prabhat
	NPS Histogram Current Quarter	Wootric NPS Reports	jha_prabhat
	NPS Promoter Levels All Time	Wootric NPS Reports	jha_prabhat
	NPS Score average for all records	Wootric NPS Reports	jha_prabhat
	NPS Promoter Levels Last Month	Wootric NPS Reports	jha_prabhat
	NPS Promoter Levels This Month	Wootric NPS Reports	jha_prabhat
	NPS Scores Last Month	Wootric NPS Reports	jha_prabhat
	NPS Scores This Month	Wootric NPS Reports	jha_prabhat
	NPS Summarized by Accounts	Wootric NPS Reports	jha_prabhat

These reports come pre-configured on Wootric Dashboard under dashboard:

Wootric Dashboard



12. Org with Person Account

If your Organization has enabled [Person Accounts](#), you will need to allow the Wootric Promoter Level Picklist values to be available for the Person Account Record Type.

Navigate to *Setup – Build – Customize – Accounts – Person Accounts – Record Types*.

Edit the “Promoter Level” picklist for Person Account Record Type, and make each value available for use.

- ▶ Company Profile
- ▶ Security Controls
- ▶ Domain Management
- ▶ Communication Templates
- ▶ Translation Workbench
- ▶ Data Management
- ▶ Mobile Administration
- ▶ Desktop Administration
- ▶ Lightning for Outlook
- ▶ Lightning Sync
- ▶ Email Administration
- ▶ Google Apps
- ▶ Data.com Administration

Build

- Customize
 - ▶ Tab Names and Labels
 - ▶ Home
 - ▶ Activities
 - ▶ Campaigns
 - ▶ Leads
 - Accounts
 - Fields
 - Related Lookup Filters
 - Validation Rules
 - Triggers
 - Partner Roles
 - Contact Roles on Accounts
 - Page Layouts
 - Field Sets
 - Compact Layouts
 - Search Layouts
 - Buttons, Links, and Actions
 - Record Types
 - Limits
 - Account Teams
 - Account Team Member Layout
 - Account Settings
 - Person Accounts
 - Page Layouts
 - Compact Layouts
 - Record Types

Picklists Available for Editing

Action	Field
Edit	Salutation
Edit	Account Source, Lead Source
Edit	Active
Edit	Customer Priority
Edit	Industry
Edit	Level
Edit	Ownership
Edit	Promoter Level
Edit	Rating
Edit	SLA
Edit	Type
Edit	Upsell Opportunity

Then move all values from Available to Selected Values:

Record Type Edit
Promoter Level Help for this Page

General Properties

Field Label	Promoter Level
Record Type	Person Account

Picklist Values

Select an item from the Available Values list and add it to the Selected Values list to include it as a picklist value for this Record Type. Note that removing an item from the picklist does not remove it from any existing records. Finally, select a default picklist value for this Record Type.

Available Values		Selected Values
--None--	Add ▶	Detractor
	Remove ◀	Passive
		Promoter

Default: --None--

Save Cancel

NPS, CSAT and CES Scheduled Jobs for Account object

During the Managed Package installation, scheduled jobs are created by package -- one to calculate monthly report for Account which runs hourly and other to calculate Quarterly report which runs nightly.

Because of permission issues or just how your org is setup, these jobs may not get created automatically during package installation process or if they are created, they may not have right permissions to generate reports. The solution is to recreate these jobs manually as admin or [run this script through Salesforce developer console as admin](#).

When adding these jobs manually, the job names should be one or more of following. Each of these jobs leverages a same scheduler class **AccountsNPSFieldScheduler** internally.

```
'WootricAccountsQuarterlyNPSJob'
'WootricAccountsQuarterlyCESJob'
'WootricAccountsQuarterlyCSATJob'
'WootricAccountsMonthlyNPSJob'
'WootricAccountsMonthlyCESJob'
'WootricAccountsMonthlyCSATJob'
```

All Scheduled Jobs

[Help for this Page](#)

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: **All Scheduled Jobs** [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All						
Action	Job Name ↑	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	WootricAccountsMonthlyJob	Wootric NPS	11/26/2017 4:47 PM	11/29/2017 2:00 PM	11/29/2017 3:00 PM	Scheduled Apex
Manage Del	WootricAccountsQuarterlyJob	Wootric NPS	11/26/2017 4:47 PM	11/29/2017 1:00 AM	11/30/2017 1:00 AM	Scheduled Apex

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

You can create a new job that runs at your schedule. Make sure job name matches one listed above.

You can create a new job that runs at your schedule. For Apex Class, enter *AccountsNPSFieldScheduler*

Schedule Apex

[Help for this Page](#)

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Save Cancel

Job Name Custom job

Apex Class AccountsNPSFieldScheduler

Schedule Apex Execution

AccountsNPSFieldScheduler

☒ Weekly
 ☐ Monthly

Recurs every week on
☒ Sunday
☐ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday

Start 6/4/2017 [6/4/2017]
 End 7/4/2017 [6/4/2017]
 Preferred Start Time --None--

Exact start time will depend on job queue activity.

Save Cancel

Reach out to InMoment support if you need help.

Trigger InMoment Surveys using Salesforce Workflows

Documentation to configure Salesforce workflows (Limited Availability) is available [here](#).