InMoment

WOOTRIC IS NOW INMOMENT

Salesforce Managed Package Installation Guide v1.37

Contents

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=a0N3A00000EhHwlUAF

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.

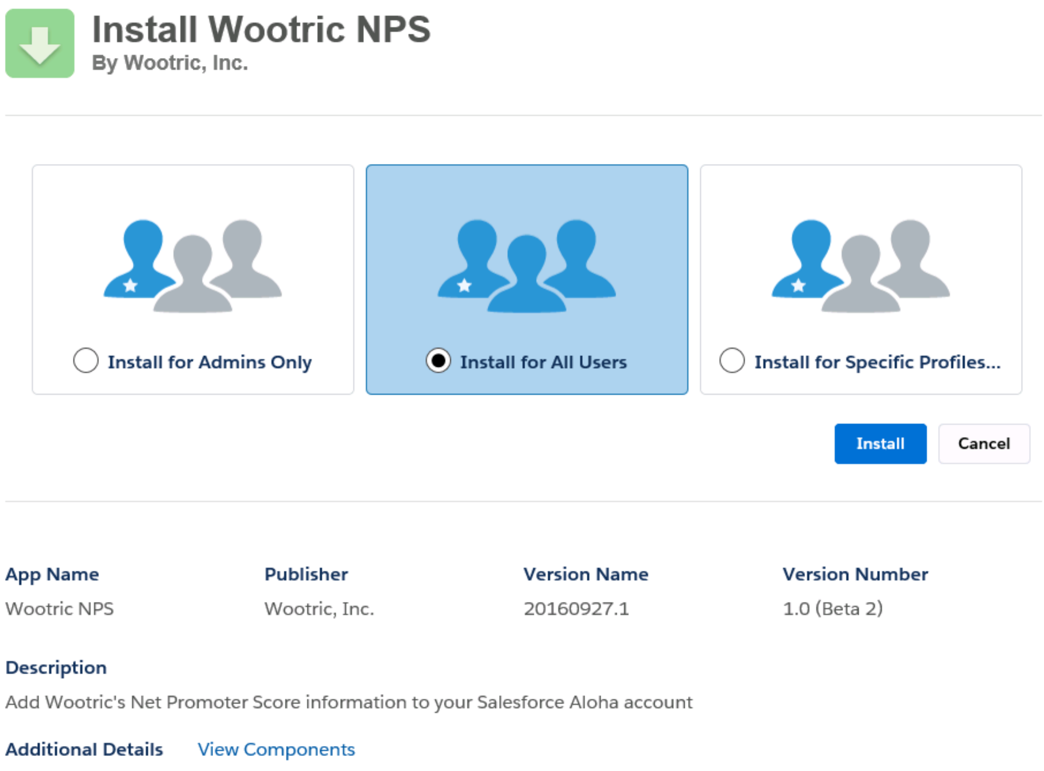


Figure 1 – Access Rights

6.2. Install

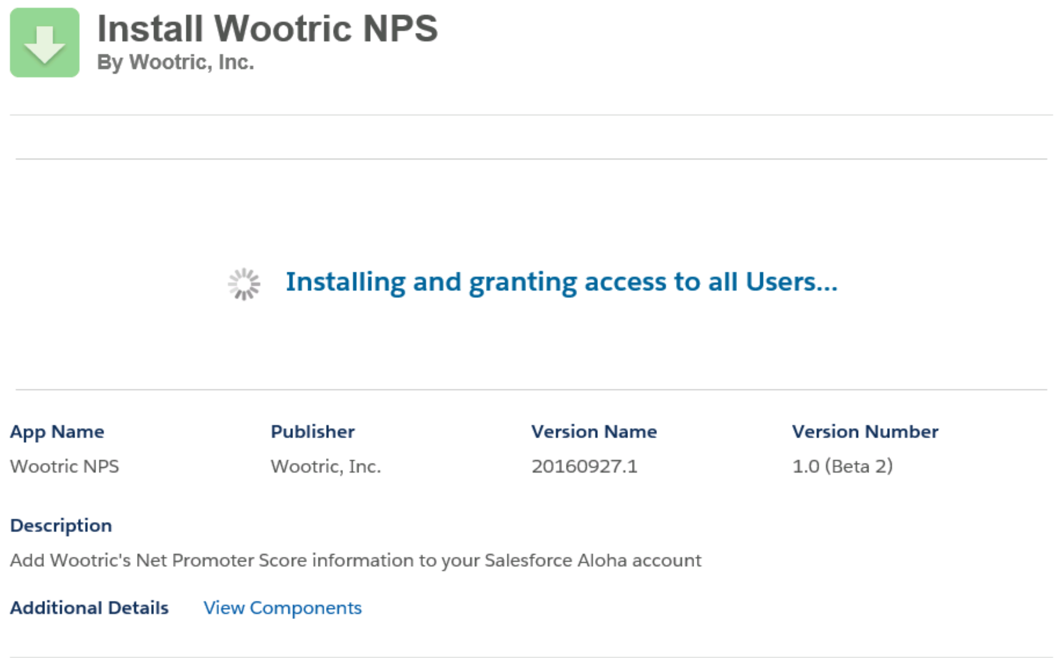


Figure 2 – Installation Steps

6.3. Completed

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

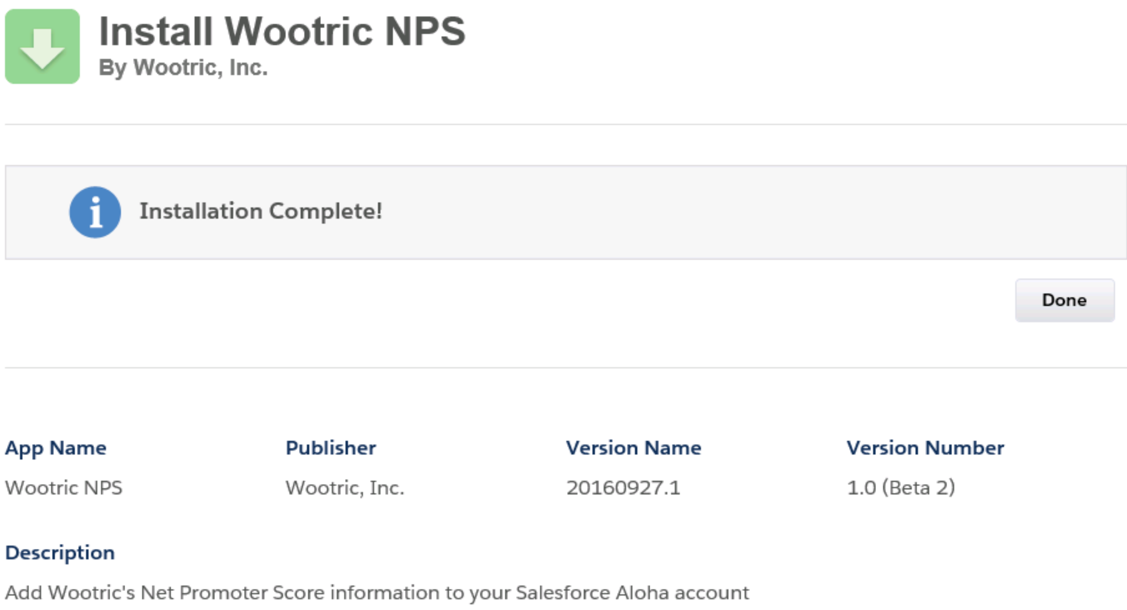


Figure 3 – Installation Steps

6.4. Turn on integration in your InMoment Dashboard

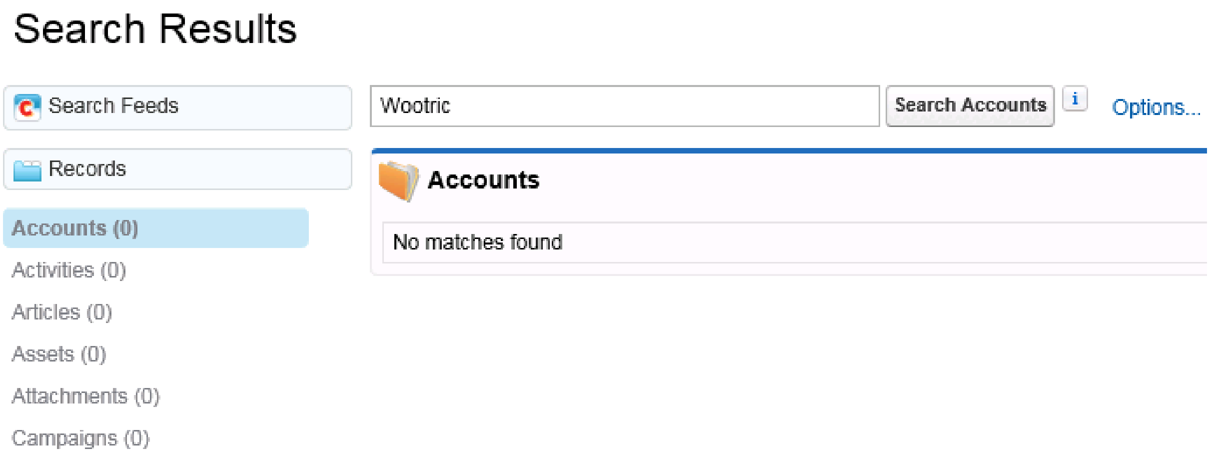
a. Go to https://app.wootric.com/account_settings/edit
b. Select Integrations->Send Data> Salesforce
c. Click on 'set up'
d. Click Connect to Salesforce and follow the prompt.
e. On successful connection, InMoment will start sending your pre-existing i.e historical customer feedbacks to Salesforce in 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.
f. 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.



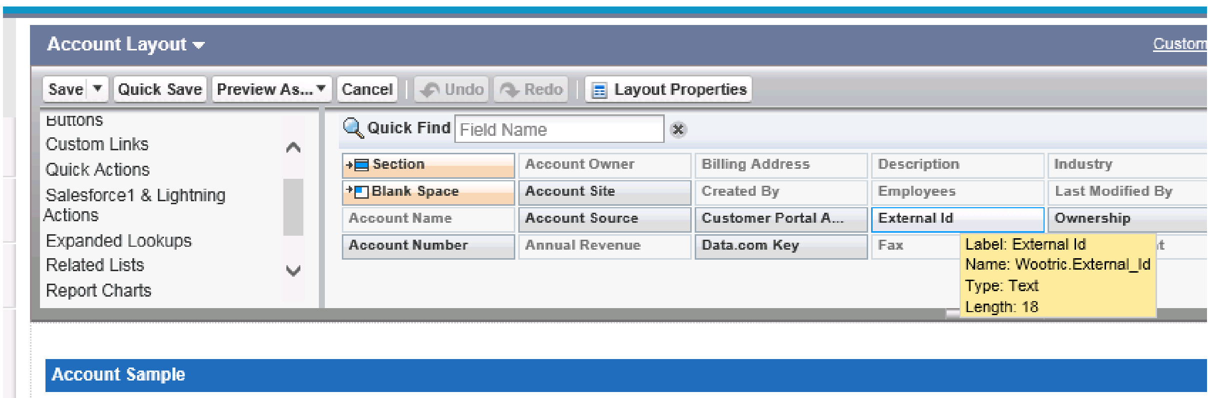
If no account can be found, or you wish to change the default Account that “Wootric Unknown Contacts” are created under, then

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.

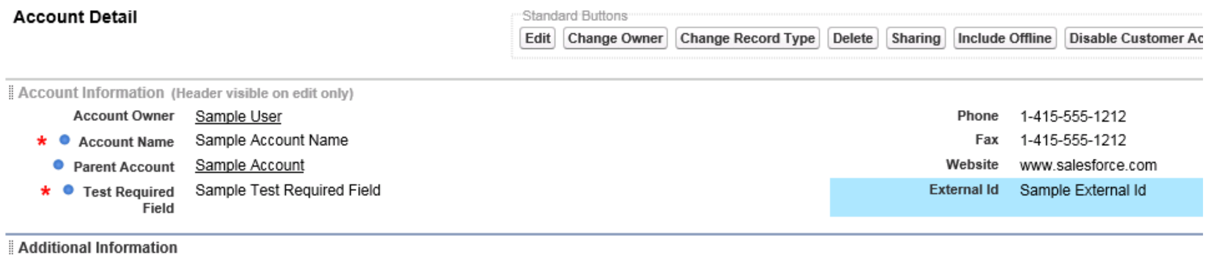
Once created, click “Edit Layout” on the top right of the Account page

Find the Wootric “External Id” field.

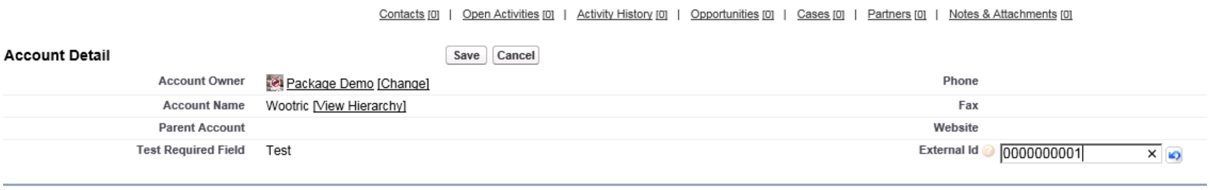


And drag it onto the Account Layout.

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



Double click on the new External Id Field, and enter this 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.

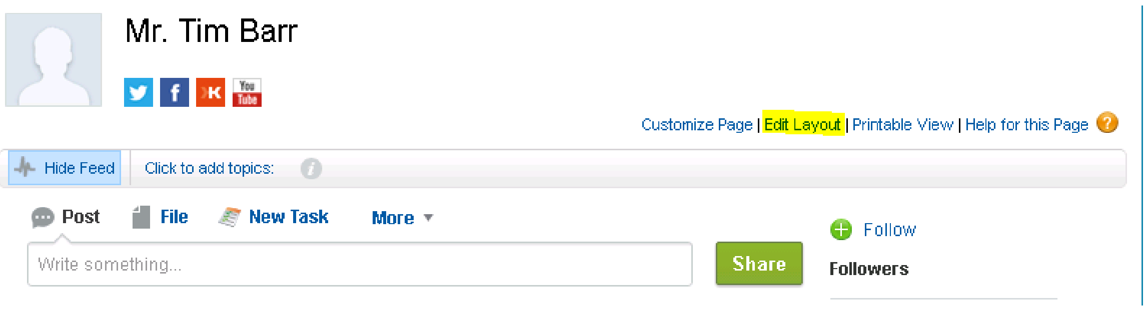
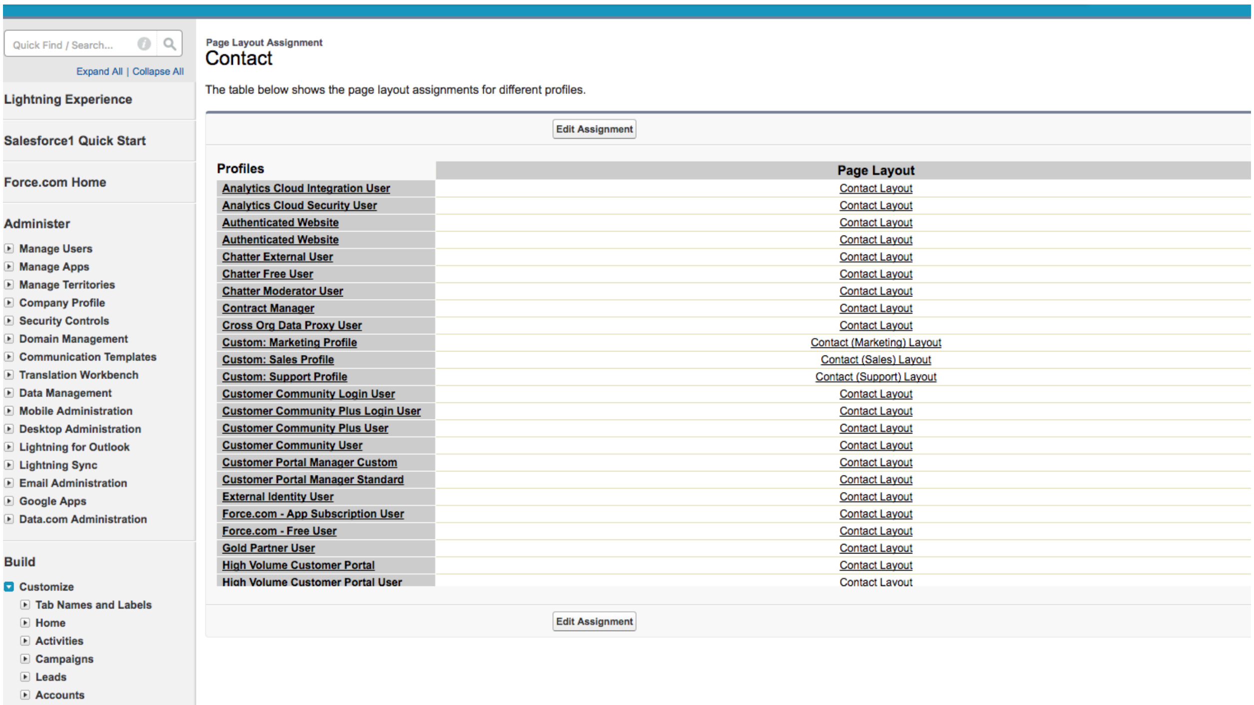


Figure 4 – Edit Contact Layout

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.



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.

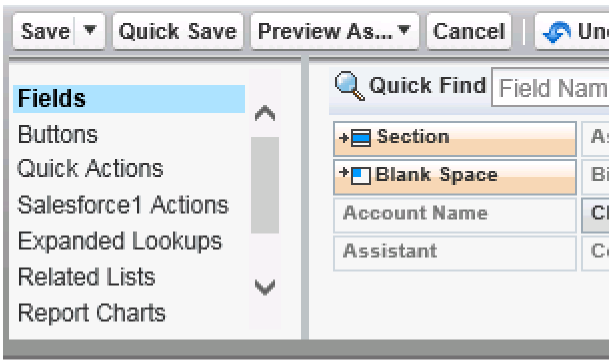


Figure 5 – Add Section

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

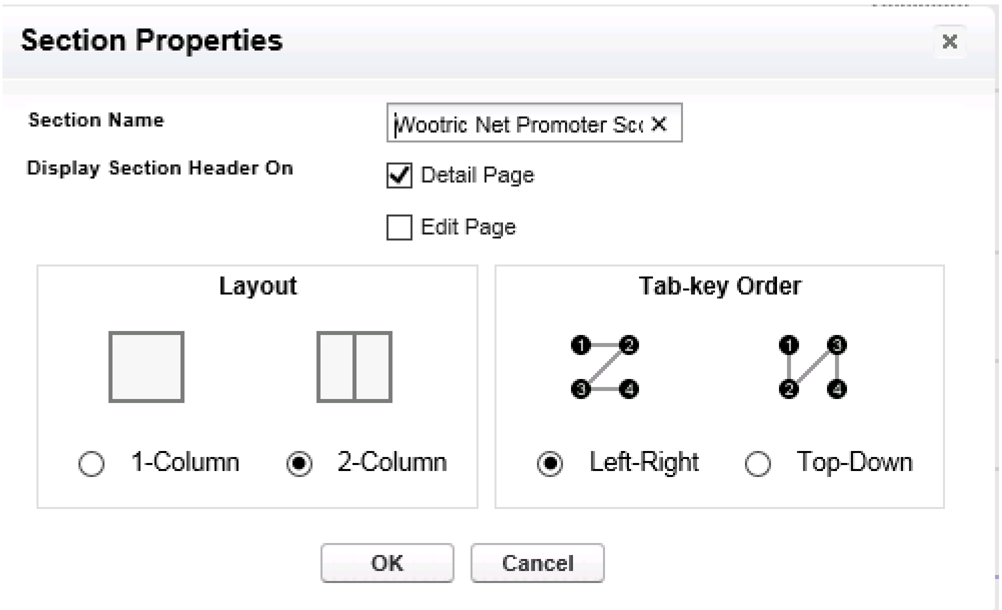


Figure 6 – Section 1 Properties

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.

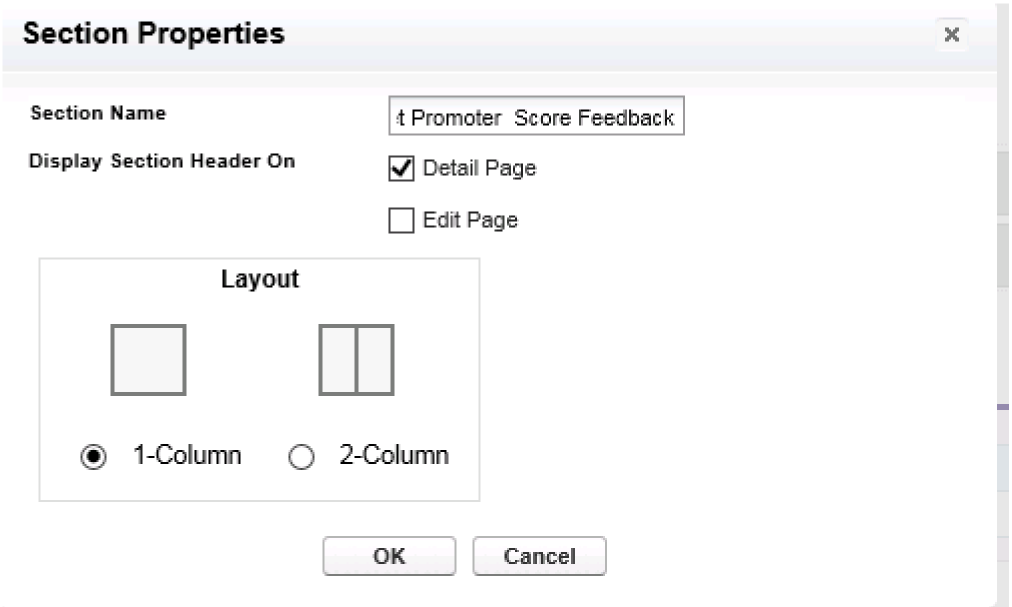


Figure 7 – Section 2 Properties

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.

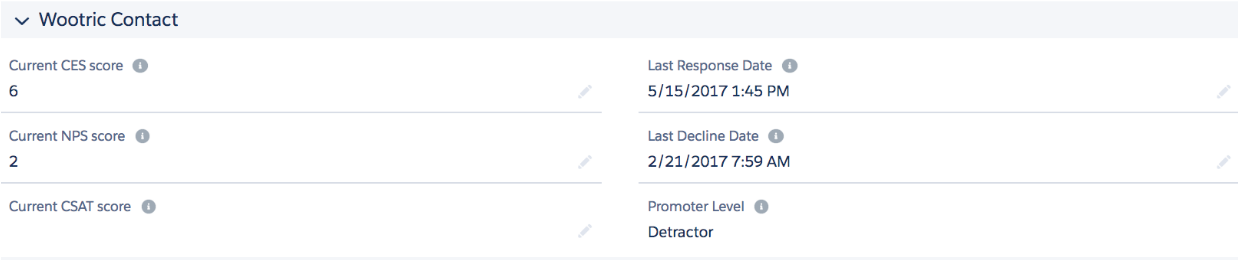


Figure 8 – Contact Fields

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”.

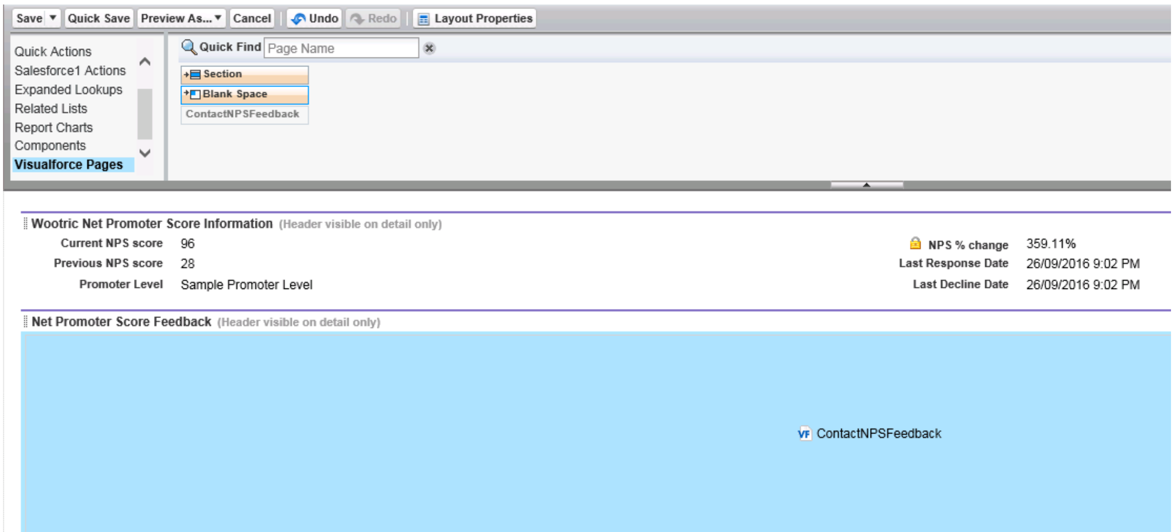


Figure 9 – Add Contact Related List

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.

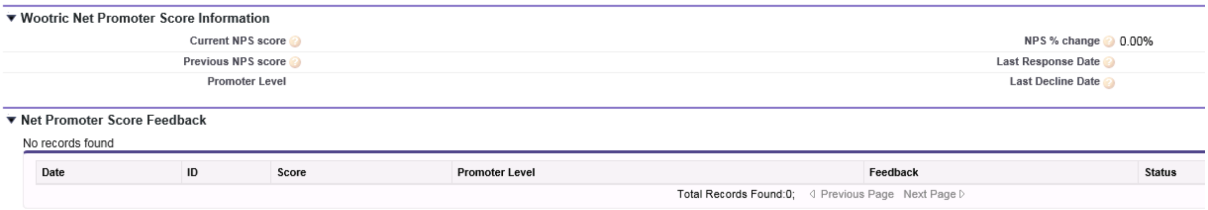


Figure 10 – Contact Related List

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.

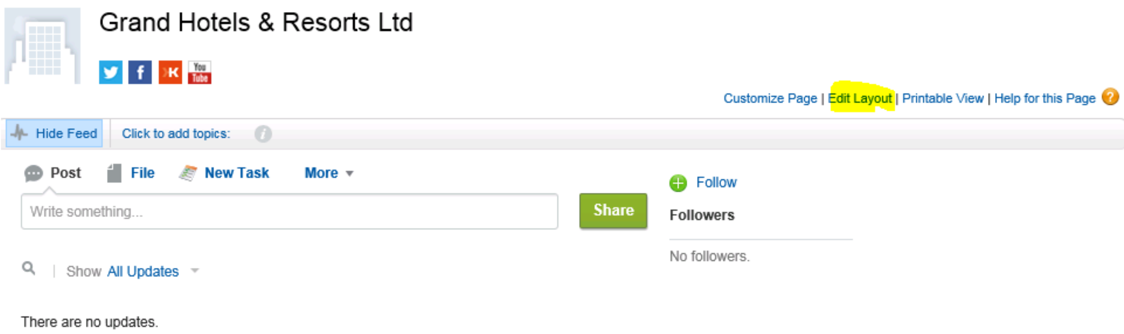


Figure 11 – Edit Account Layout

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.

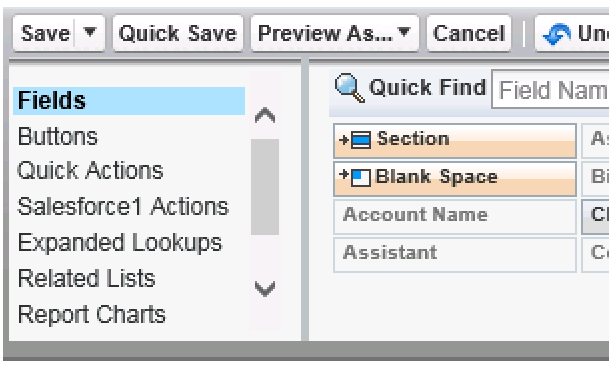


Figure 12 – Account Section

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.

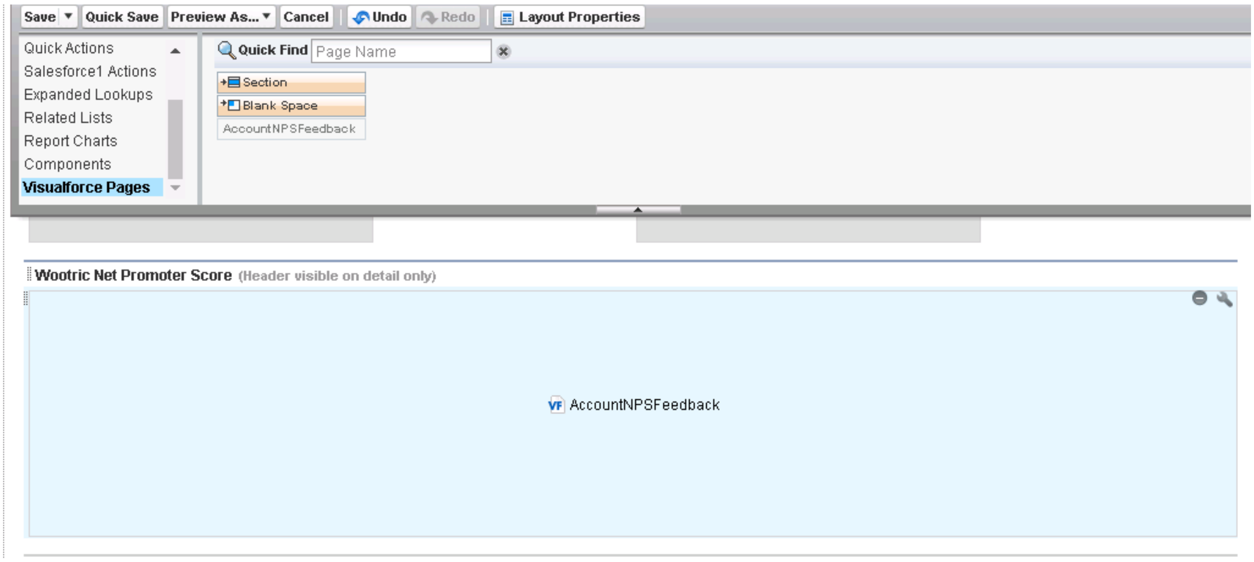
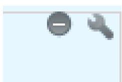


Figure 13 – Add Account Related List

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.



Set the height to 400

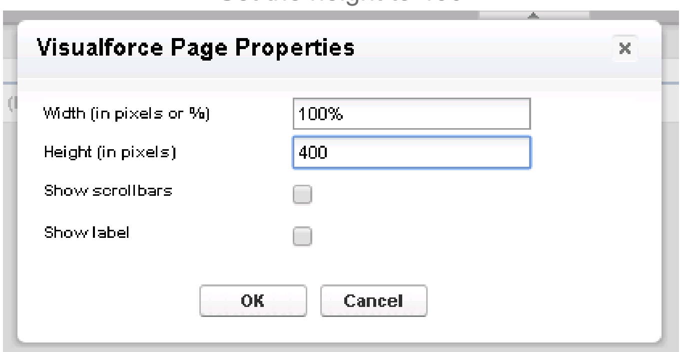


Figure 14 – Set Related List Height

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.

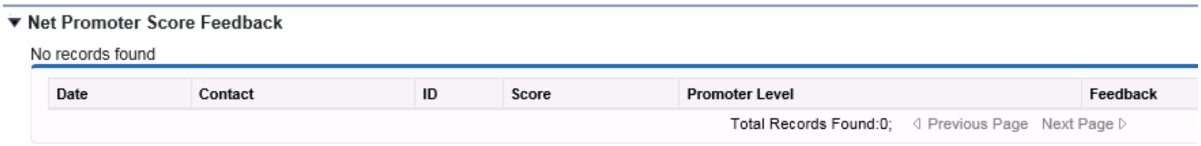


Figure 15 – Account Related List

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.

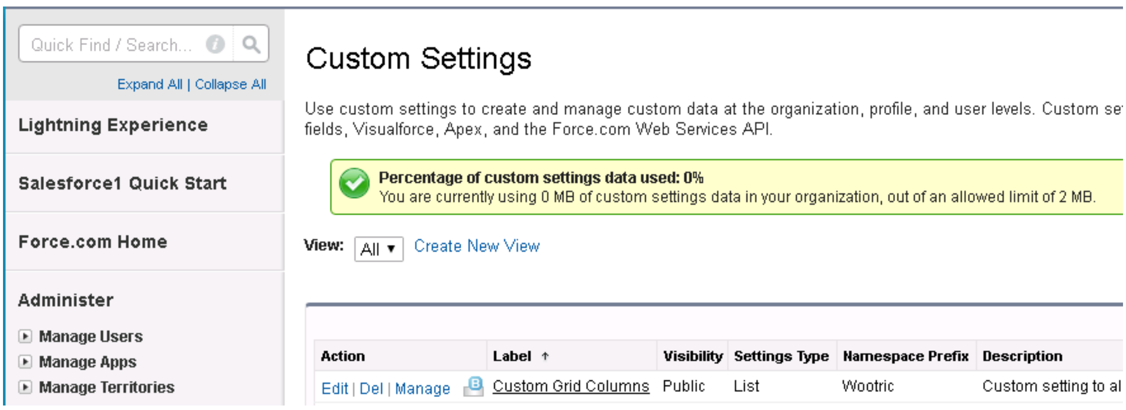


Figure 16 – Custom Setting

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.

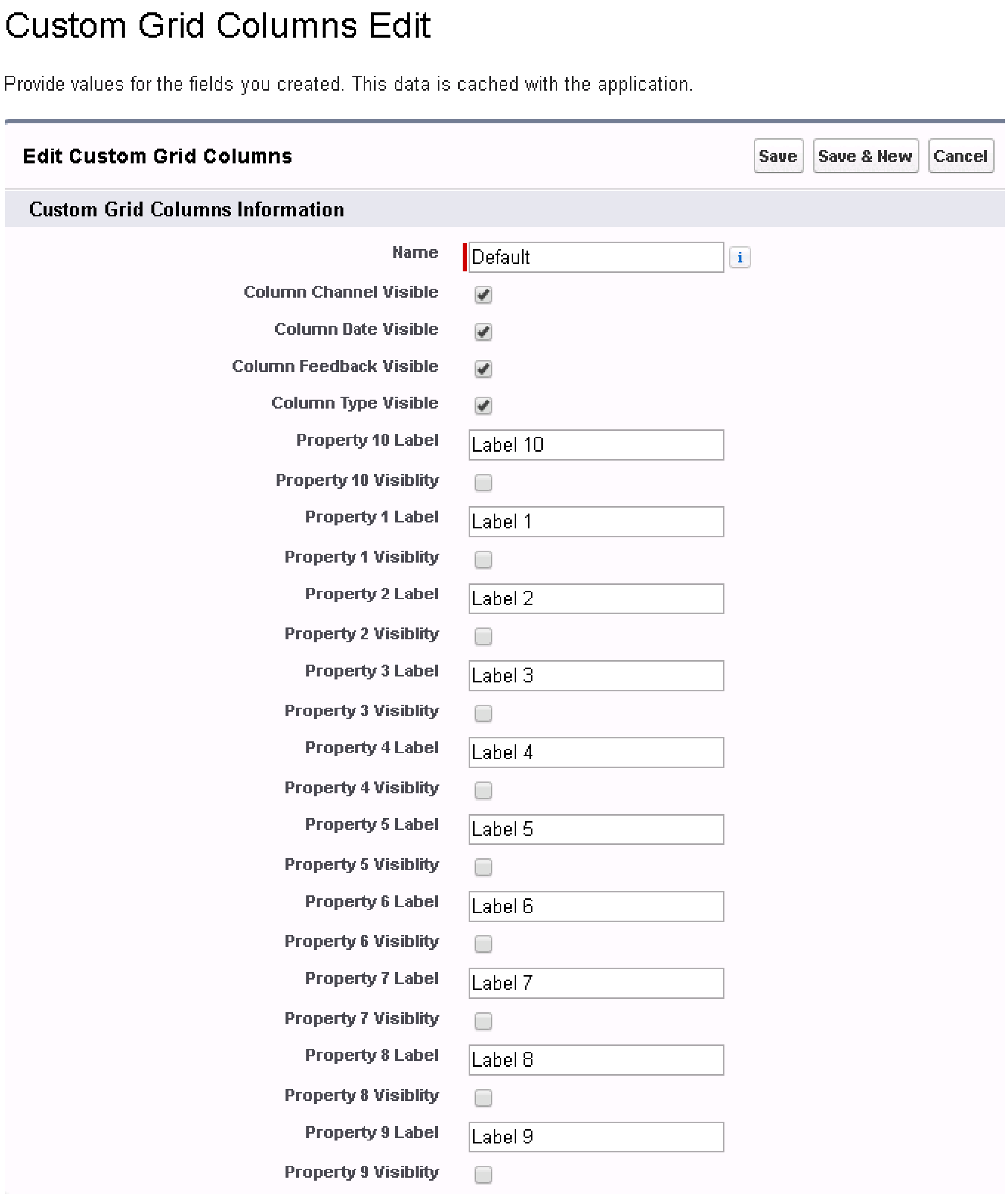
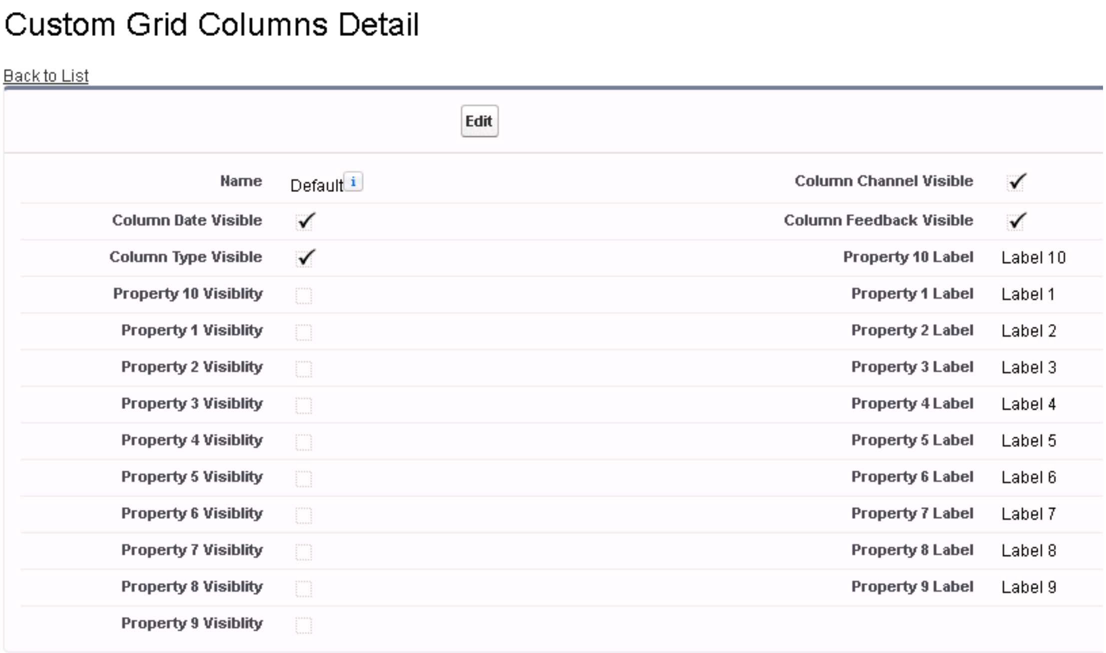


Figure 17 – Change Default Organization Settings



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 Visiblity	☐	Property 1 Label	Label 1
Property 1 Visiblity	☐	Property 2 Label	Label 2
Property 2 Visiblity	☐	Property 3 Label	Label 3
Property 3 Visiblity	☐	Property 4 Label	Label 4
Property 4 Visiblity	☐	Property 5 Label	Label 5
Property 5 Visiblity	☐	Property 6 Label	Label 6
Property 6 Visiblity	☐	Property 7 Label	Label 7
Property 7 Visiblity	☐	Property 8 Label	Label 8
Property 8 Visiblity	☐	Property 9 Label	Label 9
Property 9 Visiblity	☐		

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.

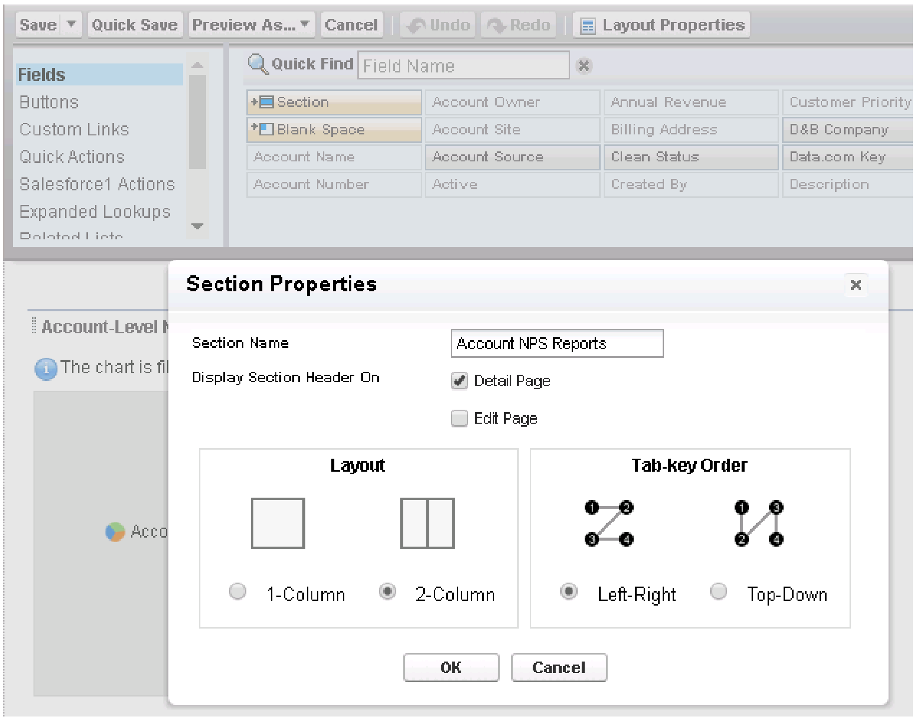


Figure 19 – New Account Layout Section

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.

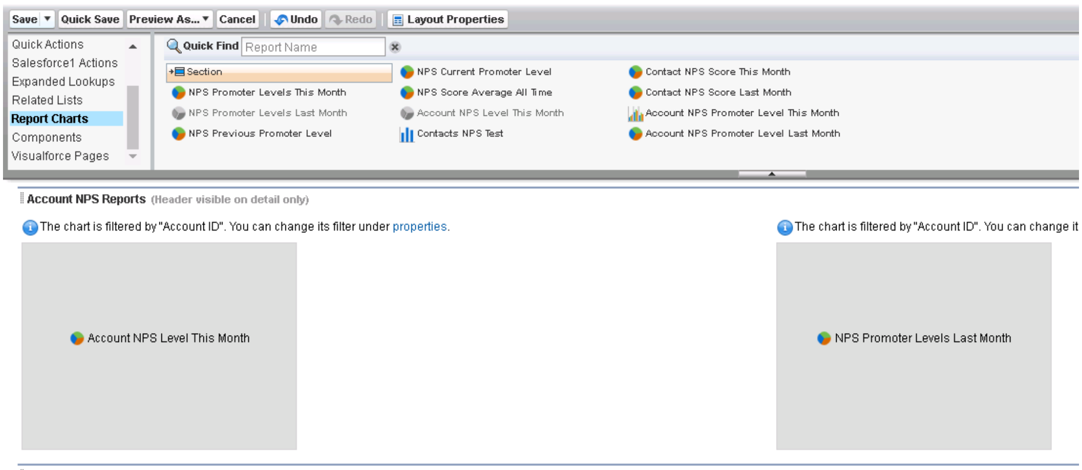
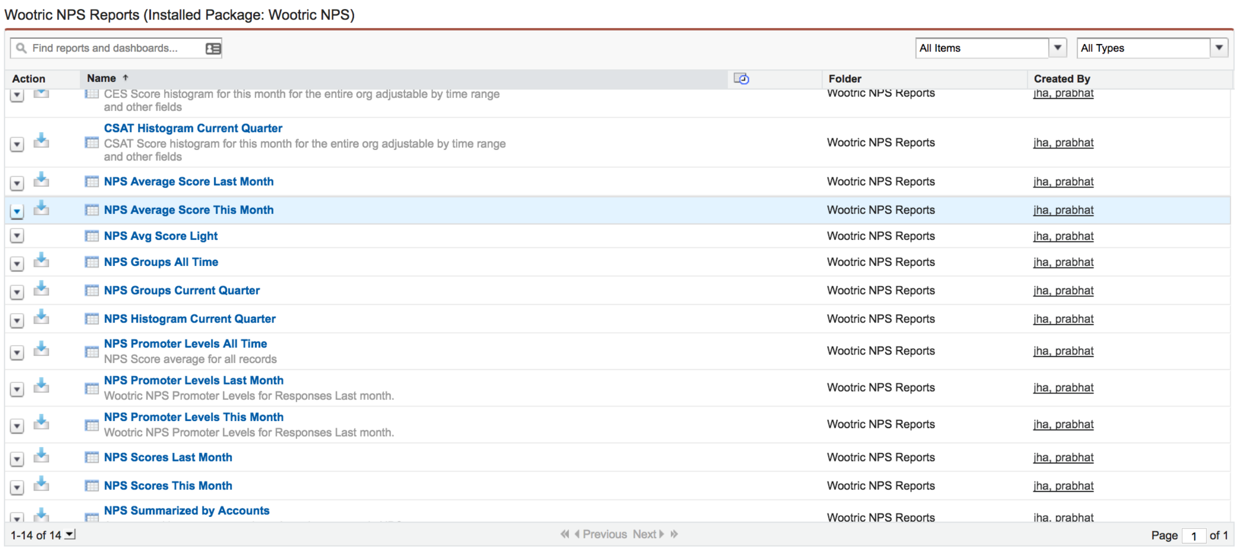


Figure 20 – Add Reports to Layout Section

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)

Find reports and dashboards... | All Items | All Types

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 CSAT Score histogram for this month for the entire org adjustable by time range and other fields	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 NPS Score average for all records	Wootric NPS Reports	jha, prabhat
	NPS Promoter Levels Last Month Wootric NPS Promoter Levels for Responses Last month.	Wootric NPS Reports	jha, prabhat
	NPS Promoter Levels This Month Wootric NPS Promoter Levels for Responses Last 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

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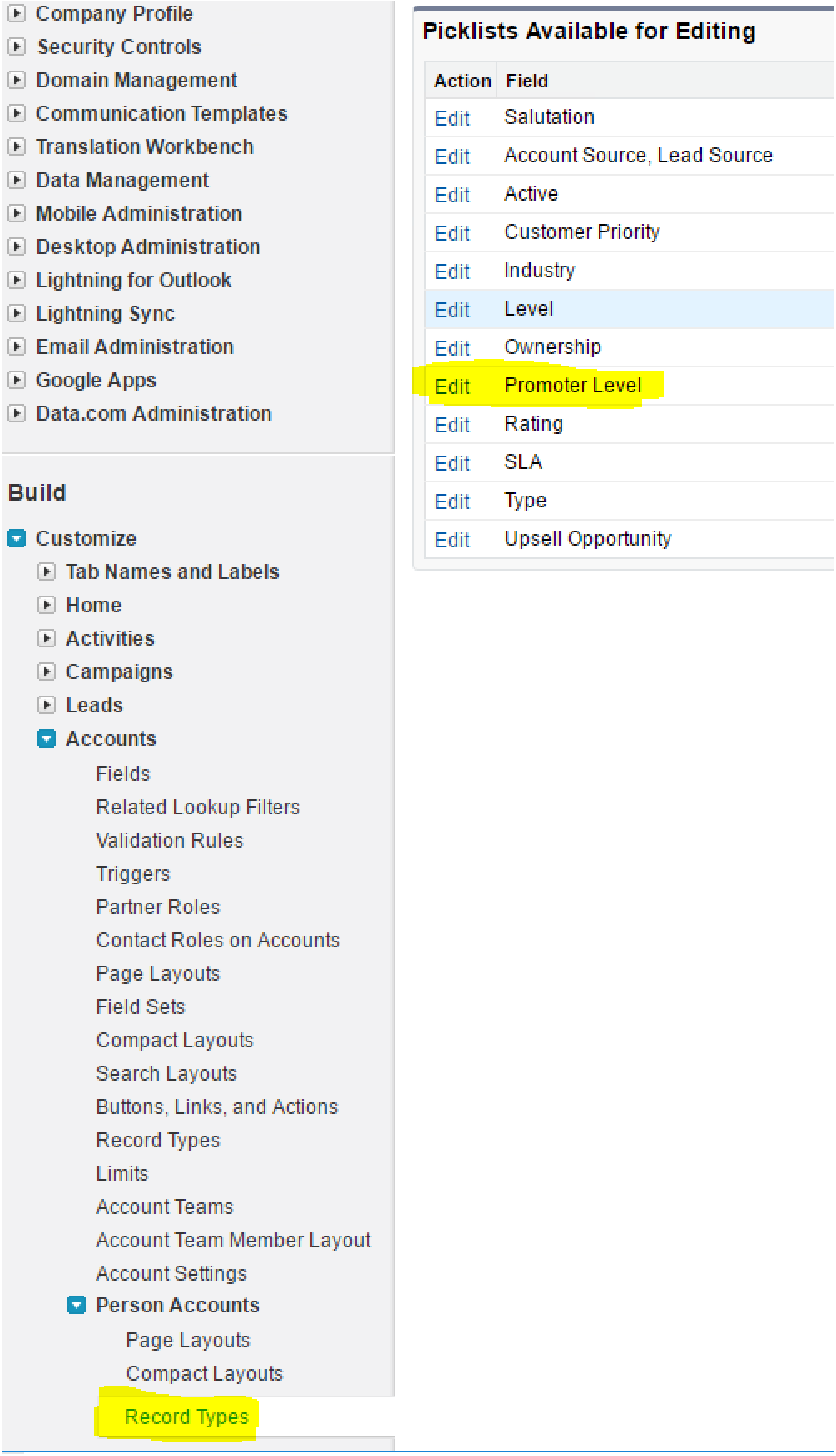
These reports come pre-configured on Wootric Dashboard under dashboard:

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:

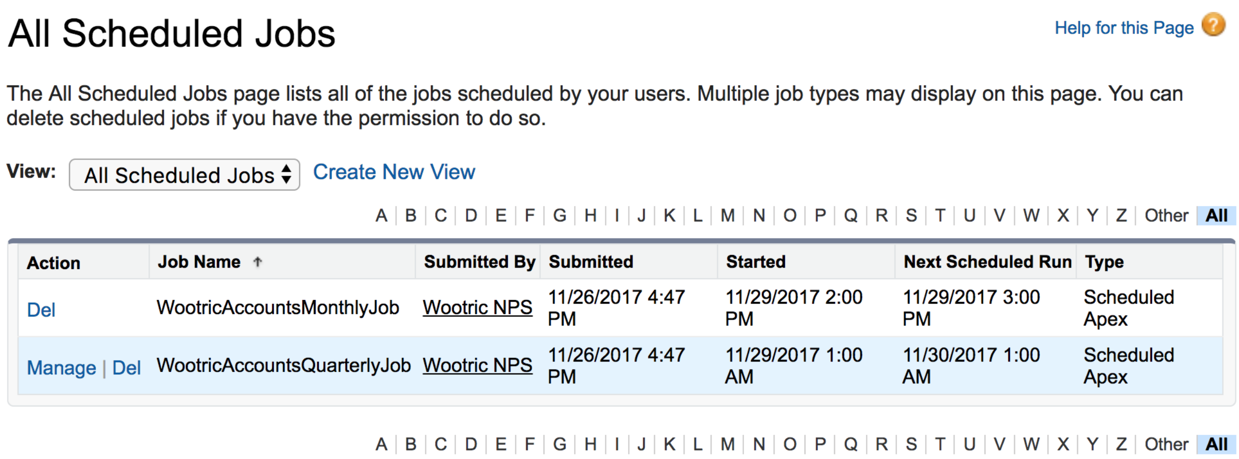
NPS, CSAT and CES Scheduled Jobs for Account object

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.

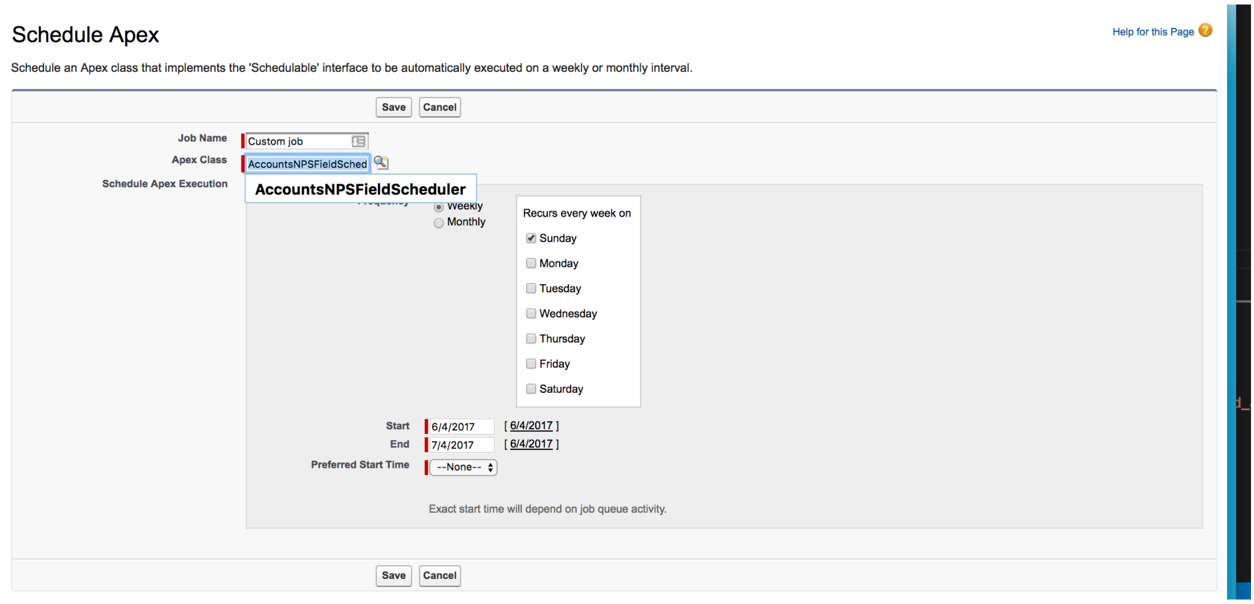
```
'WootricAccountsQuarterlyNPSJob'
'WootricAccountsQuarterlyCESJob'
'WootricAccountsQuarterlyCSATJob'
'WootricAccountsMonthlyNPSJob'
'WootricAccountsMonthlyCESJob'
'WootricAccountsMonthlyCSATJob'
```



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

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*



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.