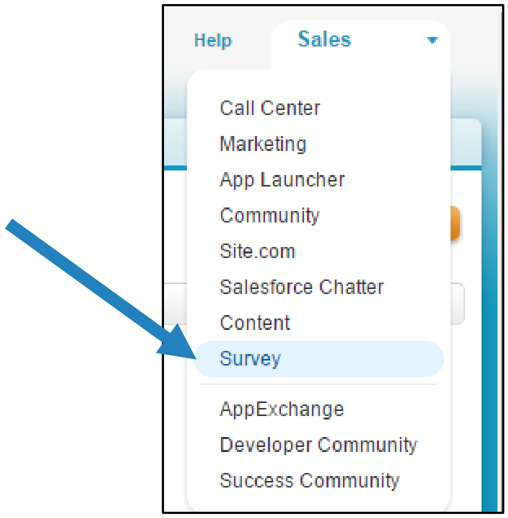
Surveys with Visual Flow and Force.com Sites: Setup Guide

Post-Installation

1. Navigate to the survey application by clicking on the dropdown in the upper right-hand corner.



2. Click on the survey configurations tab and select the “New” button.

3. On the screen, you will be able to setup branding for your survey. Use the “Site Preview” button to ensure that the branding appears as you wish.

Note: There are validation rules in place to ensure that your branding will render correctly. Help text is also available to assist in case you are unsure of how to format the text.

Be sure to check your styling and colors across multiple browsers and different versions of each browser!

Site Preview Button

Survey Configuration Detail

Edit | Delete | Clone | Site Preview

Survey Configuration Name	Standard Branding
Background Color	#B2D1FF
Button Style	color:#FFFFFF; background-color:#3399FF; border:0px none; margin: 10px; padding: 4px 7px; border-radius: 3px; font-size: 14px;
Text Size	20px
Container Color	#E8EDFA

Standard Branding

Owner: Jeremiah Dohn [Change]

Header

Header Color	#666666	Header Image Height	75px
Header Height	85px	Header Image Width	100px
Header Image	SFDC CLOUD NINJA		

Header Info & Image

System Information

Created By	Jeremiah Dohn, 9/13/2015 1:55 PM	Last Modified By	Jeremiah Dohn, 10/4/2015 5:20 PM

Edit | Delete | Clone | Site Preview

Flow of Setting Up a Survey

1. Answers

2. Answer Choices

3. Questions

4. Survey Template

5. Template Questions

Answers Setup

1. Go to the Answers tab and click on the “New” button.

2. Enter a memorable name.

Note: Typically, you will have scales which will be reused. It is best to ensure that you are not duplicating the same scale.

Answer Choices Setup

1. Once your Answer has been created, you can then create an answer choice. Select “New Answer Choice” on the Answer Choice related list on the answer page layout.

2. You will specify a text value. This is what will appear in your flow screen.

3. Specify a score for the Answer Choice. This will be if you need to track metrics on how well the survey went overall.

Make sure your scoring is consistent! Determine that you want a high score a low score to be used for your KPI and ensure that your Answer Choices reflect this in relation to each other!

Question Setup

1. Select the Questions tab and click on the "New" button.

2. Enter Short Question Text for your reports and Long Question Text for what will appear during the survey.

Note: You can use limited styling to emphasize key words for the respondent. Consider the following:

How would you rate the overall knowledge of the staff member who assisted you?

Would display as:

How would you rate the overall **knowledge** of the staff member who assisted you?

3. Relate your Question to the appropriate Answer and the scale will appear during the flow.

Survey Template Setup

1. Navigate to the Survey Template tab and click on the "New" button.

2. Fill out the template name, relate it to the branding that you would like, enter Introductory Text that displays when the survey is first opened and enter Closing Text for when it is completed.

Optional: Enter the maximum amount of times that the respondent can take the survey. If there is not a maximum, leave this field blank.

Template Questions Setup

1. Add your Questions to the survey by selecting the "New Template Question" button on the Template Question related list.

2. Enter the Question that it is to relate to, how the question should appear on the survey (Picklist, Radio Button or Comments) and the order in which the question should appear.

Configuring Your Force.com Site

1. Navigate to **Setup | Develop | Sites**.

2. Click on the "New" button.

3. Enter a site name. If this page will be the only one used on your site, you may make the **survey visualforce page** your Active Site Home Page.

4. Click on the "Public Access Settings" and ensure that the following permissions are given to ensure that no errors are encountered during the flow:

	Read	Create	Edit	Delete
Cases	X			
Answers	X			
Answer Choices	X			
Questions	X			
Surveys	X		X	
Survey Reponses	X	X	X	X
Survey Configurations	X			
Survey Templates	X			
Template Questions	X			

Security is the same for Force.com Sites as it is for your users. Ensure that the public user has access to all fields and objects needed to use the flow.

For more information, check Salesforce Help.

Configuring the Email Template

1. The package comes with one Visualforce Email Template. The link to your site is configured in the EmailSurveyComponent.

2. Navigate to **Setup | Develop | Components.**

3. Click on the "EmailSurveyComponent."

4. Change the text from [yourSiteHere] to the URL in your force.com site. If the survey apex page is not your home page, make sure that you add the appropriate address.

5. The fields displayed on the template originate from the Case object and the Survey object. The fields that are displayed from the Survey are retrieved in the getSurvey class. You may modify the email template with additional Case fields by following standard merge field protocol. This avoids you needing to modify the getSurvey class, unless you have custom objects which must be referenced.

6. The email template is stored in **Setup | Communication Templates | Email Templates |Surveys Unmanaged Package** and is the **SUPPORT: Survey Template.**

7. To add additional fields, click on the "Edit" button and follow regular merge field syntax where "RelatedTo" is the case. E.g. {!RelatedTo.Description} is the Case description.

The plain text and HTML are both set in the visualforce template. Ensure to modify both!

Security

1. In order for a contact or internal user to access a survey, they must have the Token and the Survey record Id. The token is randomly generated upon record creation. If both are not provided, an error will be received.

2. The Survey Template record Id is passed as a URL parameter. This allows for the branding to be seen even if the end user does not receive a key or survey Id, though this should never happen (unless you have added a validation rule or trigger that prevents the survey from being created – be cautious in this regard).

3. API access to the Token field should only be provided to the System Administrator profile. This is only needed for trouble shooting and end users could "take" surveys if provided these tokens and the record id.

4. The Survey Configuration object was designed such that end users would be able to manage branding for various business units, specifically power users. This does mean that a hit will be taken in SOQL when loading the template, due to not using a static resources and custom settings, but is more user friendly and does not require administrative intervention. Be sure that those that receive the ability to edit the fields on the Survey Configuration object are aware of the impacts.

5. A validation rule has been added to ensure that script tags ("<script></script>") are not added to Long Text Area fields that are available during initial setup. Ensure that these validations are not escaped through custom settings and are not deactivated. This is a security measure for both your end users' and your protection.