class apps

Select Survey .NET

v5

SalesForce Lightening Component

User Guide

SelectSurvey.NET Salesforce Lightening Component User Guide

v.5.0 11/2020

You can find the SelectSurvey.NET Salesforce Lightening component in the Salesforce App Exchange at https://appexchange.salesforce.com/

Contents

Overview of the SelectSurvey Salesforce Lightening Component

You can find the SelectSurvey.NET Salesforce Lightening component in the Salesforce App Exchange at https://appexchange.salesforce.com/

The SelectSurvey Salesforce Lightening Component is a tool to enhance SelectSurvey.NET SaaS Cloud and SelectSurvey.NET on-premise software.

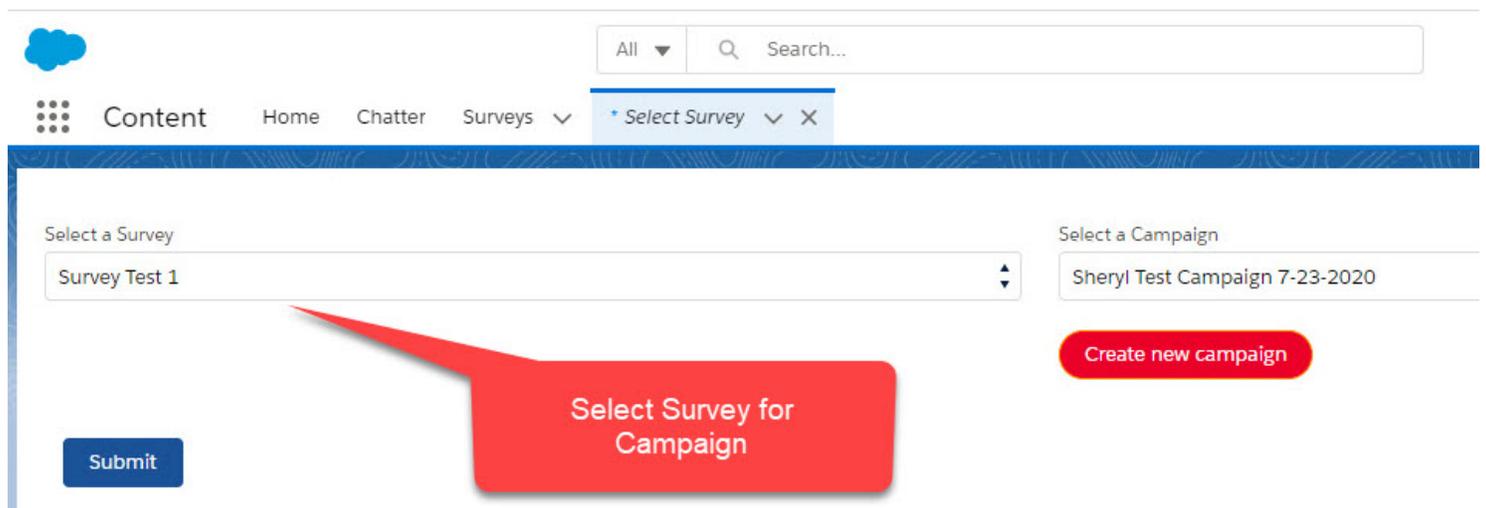The SelectSurvey Salesforce Lightening Component can be purchased in the Salesforce App Exchange, and can only be used in the Salesforce application.

A requirement for using the lightening component is that you must have a SelectSurvey.NET SaaS/Cloud account OR a SelectSurvey.NET on-premise license subscription.

Why is it helpful to get the SelectSurvey Salesforce Lightening Component?

- You can deploy survey links directly to a Salesforce Campaign from Salesforce
- You can view quick survey score of respondent for Campaign from within Salesforce
- The component makes it easy to see quick results without having to login to the SelectSurvey.NET application.
- The survey designer and administrator are the only ones that need to login to the SelectSurvey.NET application to view overview of results and other items.

A quick overview of the component for SelectSurvey:

1) Pick a survey for the Salesforce campaign

2) Viewing the survey link from the campaign

3) View details

4) Add to campaign

New Survey Lead Response

Information

Survey Lead Response Name

Lead

★ Sales B ✕

*Survey

⊘ SURVEY-00013 ✕

Total Score

Available Score

Cancel   Save & New   Save
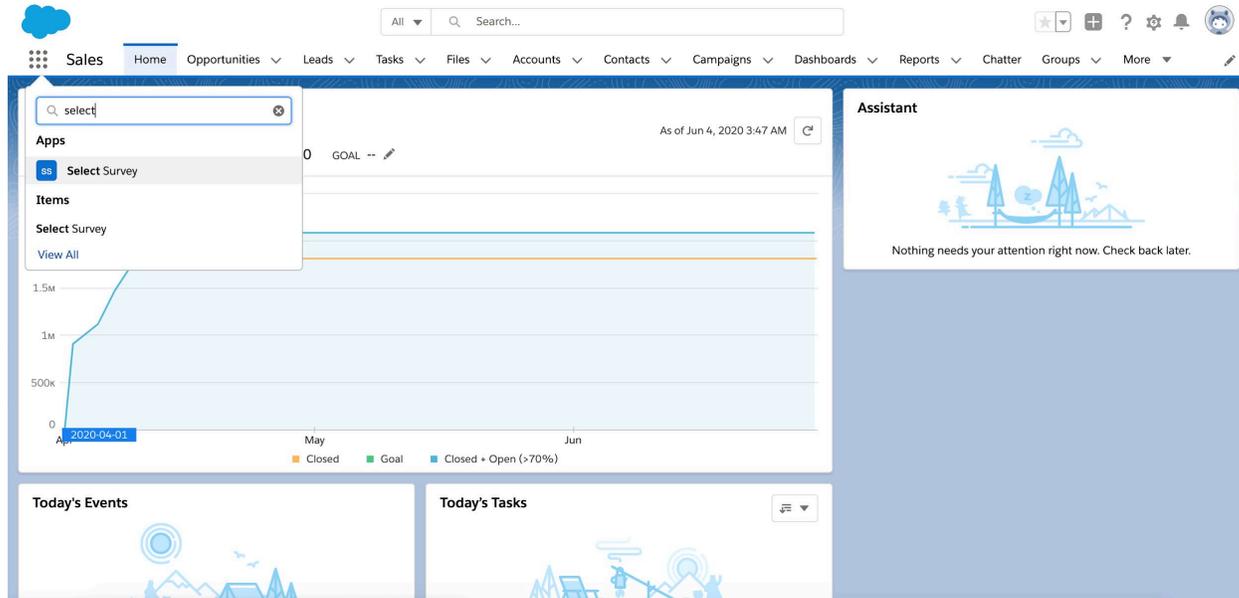
5) Add to campaign

6) View results

Getting Around Salesforce

Open the Select Survey Salesforce Application

On the top left corner after login, it displays the salesforce app name
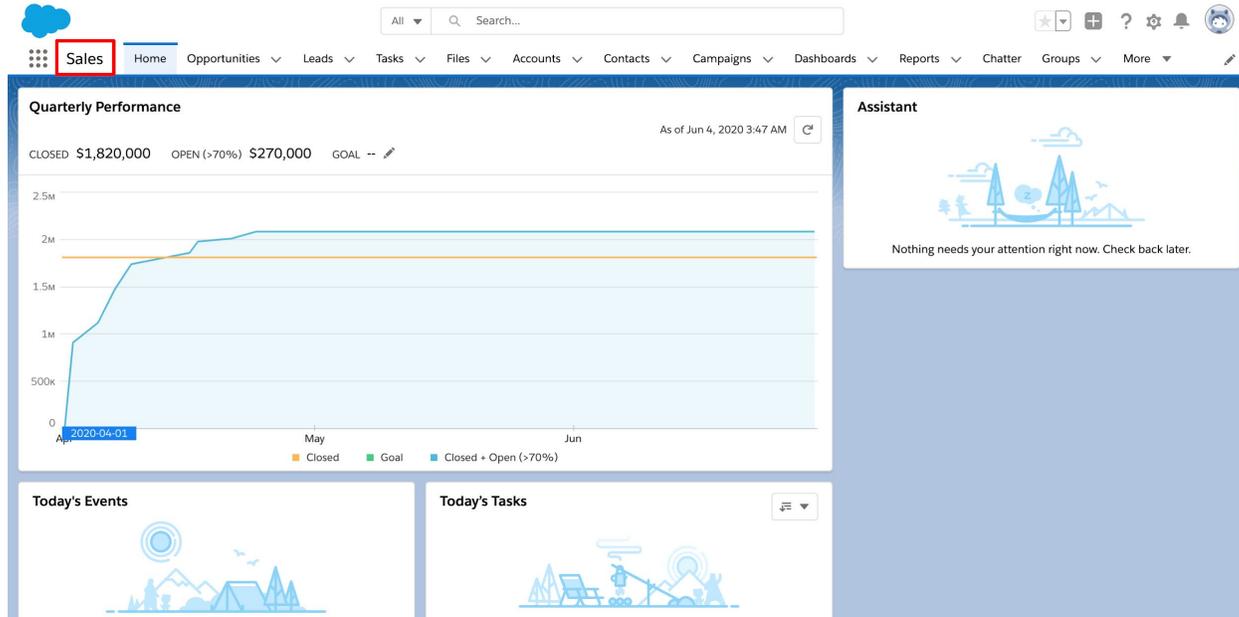
Click on the top left corner icon and search "Select Survey" in find box

Click on it, it will open the select survey application tabs

Create A Select Survey Campaign

Click Select Survey Tab

From Select Survey Field, it will show all the available surveys to use on real time callout basis

From Select Campaign Field, it will show up all available Campaigns in Salesforce.

If you do not want to choose a campaign, you can create new campaign by clicking button "Create New Campaign". It will create new campaign in Salesforce and will show up on select tab screen
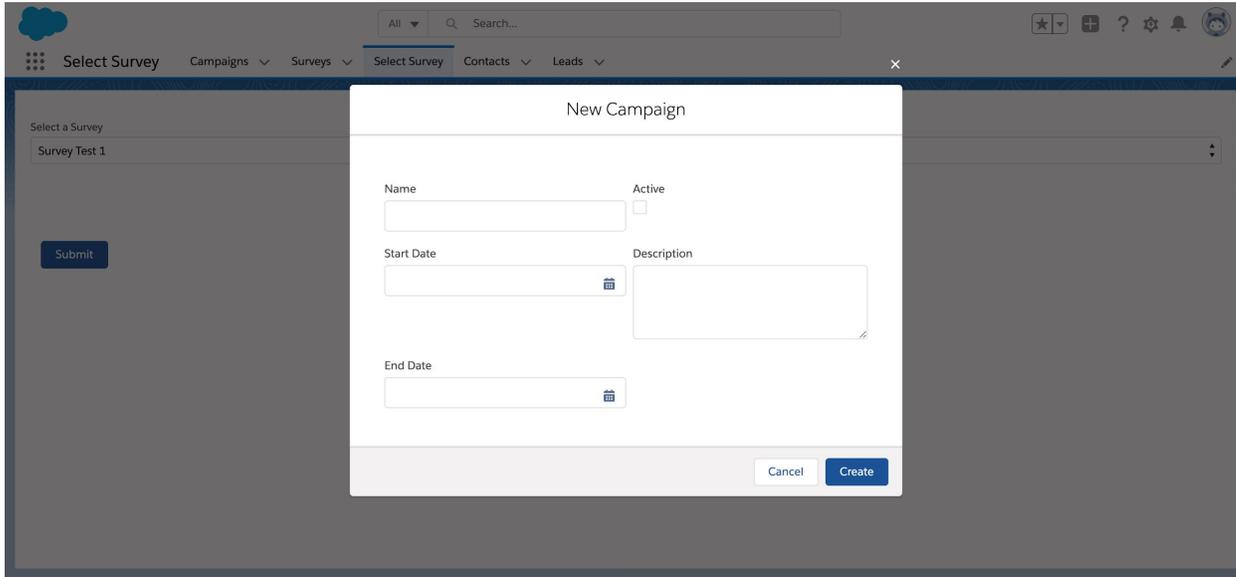
After selecting campaigns, surveys click submit. It will redirect user to campaign screen.
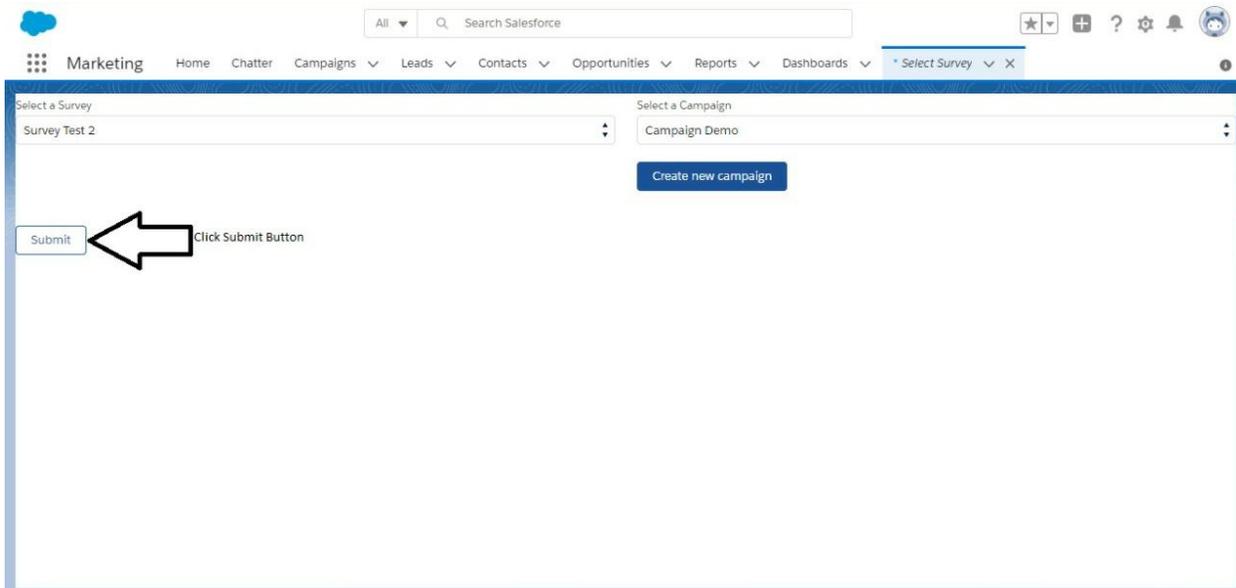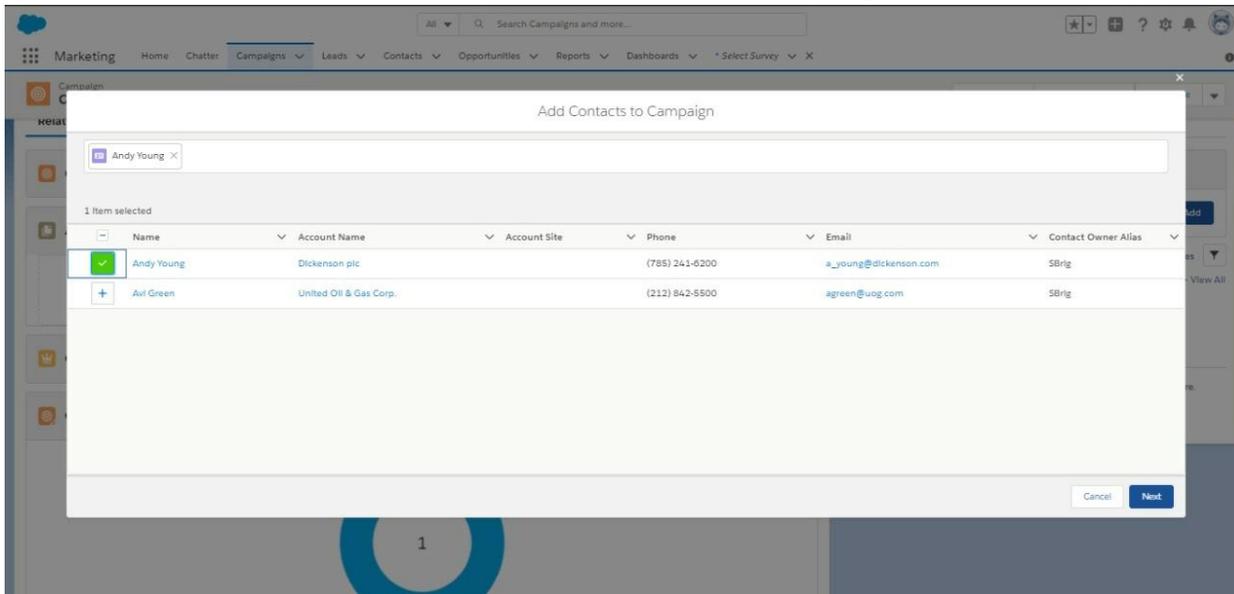
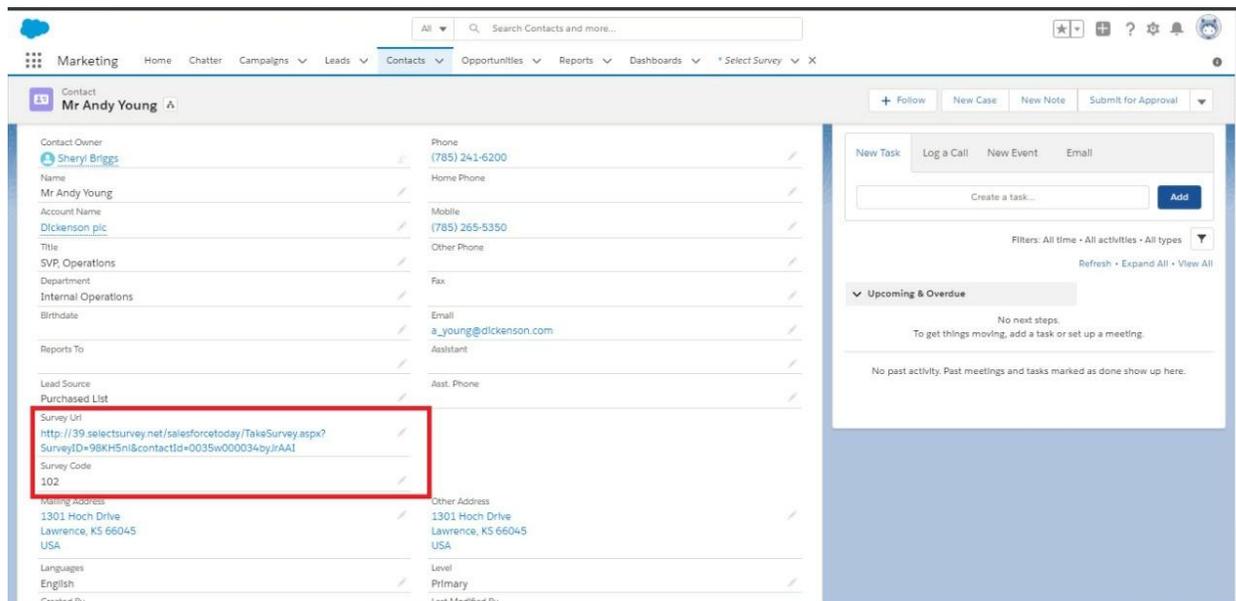On Campaign, few fields would be populated after it gets redirected to Campaign record
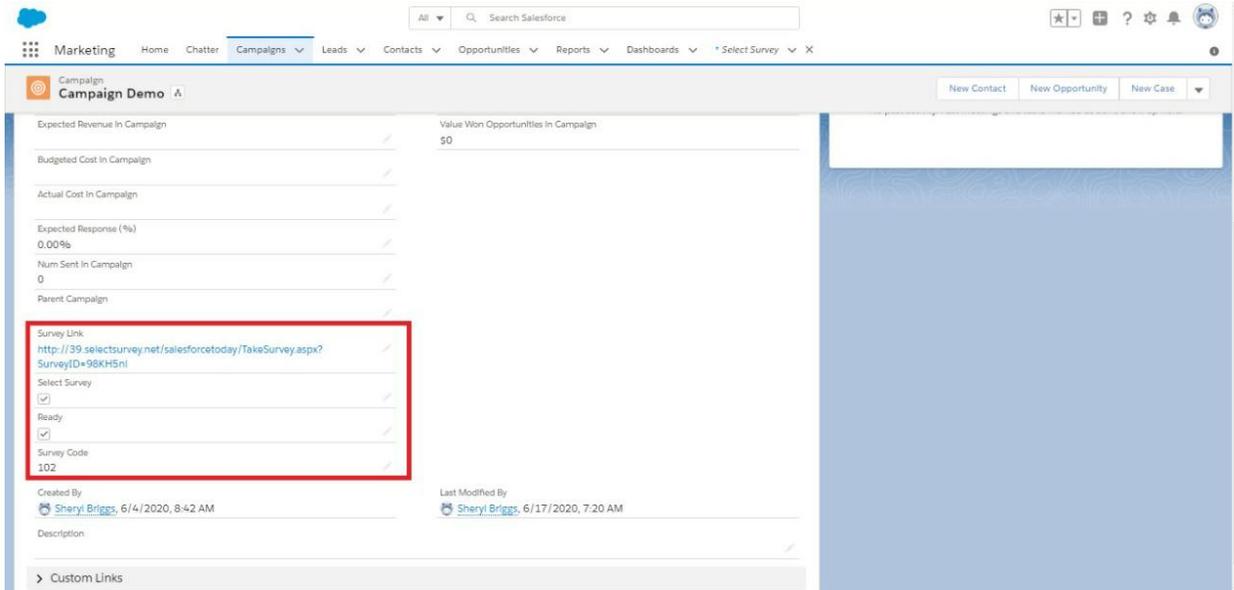
Add New Campaign Members To New Campaign

Click on the add contacts, add leads button to add campaign members from campaign record

For all the campaign members added on the campaign, it will populate the unique survey URL field on Contacts or Leads

This Unique Survey URL can be used in Mass Emails, Pardot Campaigns, Marketing Cloud Campaign or Single Email as required. Once the customer took survey, it will automatically populate Salesforce Fields as shown below