



Select Survey .NET

v5

SalesForce Lightning Component
User Guide

SelectSurvey.NET Salesforce Lightning Component User Guide

v.5.0 11/2020

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

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Overview of the SelectSurvey Salesforce Lightning Component

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

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

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

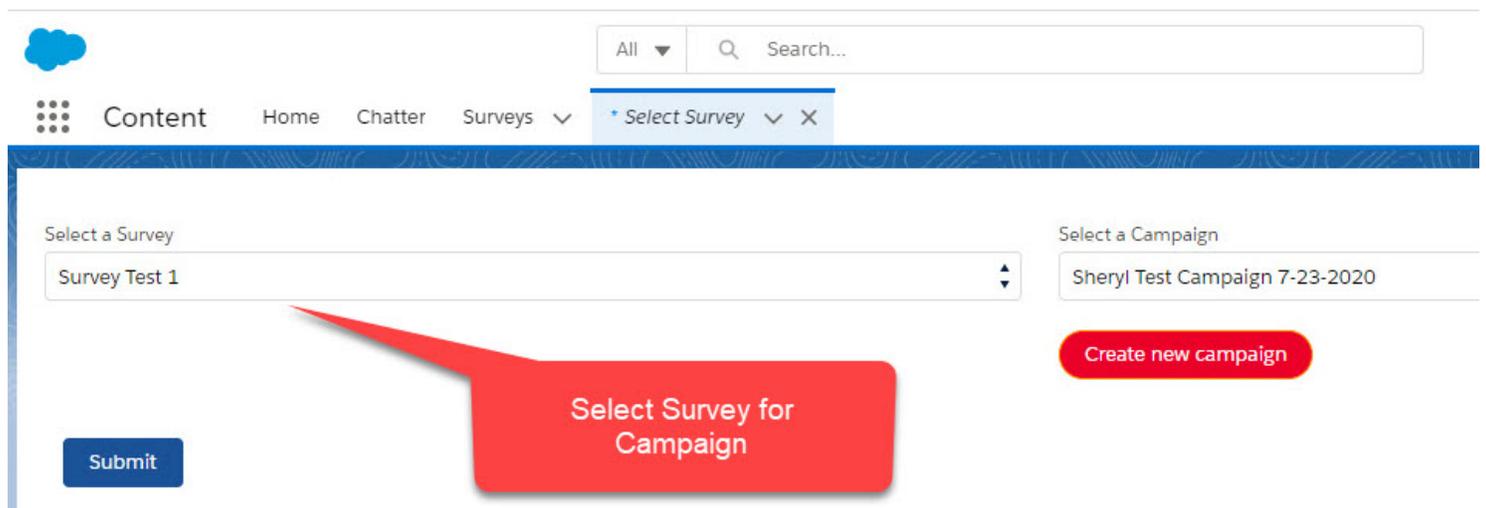
A requirement for using the lightning component is that you must have a SelectSurvey.NET SaaS/Cloud account OR a SelectSurvey.NET on-premise license subscription.

Why is it helpful to get the SelectSurvey Salesforce Lightning 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



 Campaign
Sheryl Test Campaign 7-23-2020 

8/31/2020		\$0
Expected Revenue in Campaign		Value Won Opportunities in Campaign
Budgeted Cost in Campaign		\$0
Actual Cost in Campaign		
Expected Response (%)		
0.00%		
Num Sent in Campaign		
0		
Parent Campaign		
Select Survey		
<input checked="" type="checkbox"/>		
Ready		
<input checked="" type="checkbox"/>		

Survey
[SURVEY-00013](#)

Link to the Survey associated with this Campaign

Created By
 [Sheryl Briggs](#), 7/23/2020, 11:31 AM

Last Modified By
 [Sheryl Briggs](#), 7/23/2020, 11:34 AM

Description
Sheryl Test Campaign 7-23-2020 

▾ Custom Links

[View Campaign Influence Report](#)

3) View details

0.00%

Num Sent in Campaign

0

Parent Campaign

Select Survey



Ready



Survey

[SURVEY-00013](#)



SURVEY-00013

Click To View Details



Created By

[Sheryl Briggs](#), 7/23/2020, 11:31 AM

Last Modified By

[Sheryl Briggs](#), 7/23/2020, 11:34 AM

Description

Sheryl Test Campaign 7-23-2020

Custom Links

[View Campaign Influence Report](#)

Click to View
Details of
Survey

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

Campaign
Sheryl Test Campaign 7-23-2020

Type	Status	Start Date	End Date
Conference	Planned	7/23/2020	8/31/2020

Related Details

Campaign Hierarchy (0)

Attachments (0)

Opportunities (0)

Campaign Members

Add to Campaign

1 lead selected

* Campaign

Sheryl Test Campaign 7-23-2020

* Member Status

Sent

Existing campaign member

Keep existing Member Status

Update to the selected Member Status

6) View results

The screenshot displays the Salesforce interface for a survey. At the top, the navigation bar includes 'Content', 'Home', 'Chatter', and 'Surveys' (highlighted with a red box). A search bar and utility icons are also present. The main content area is titled 'Survey SURVEY-00013' and includes 'Delete', 'Edit', and 'Clone' buttons. The 'Details' tab is active, showing the following information:

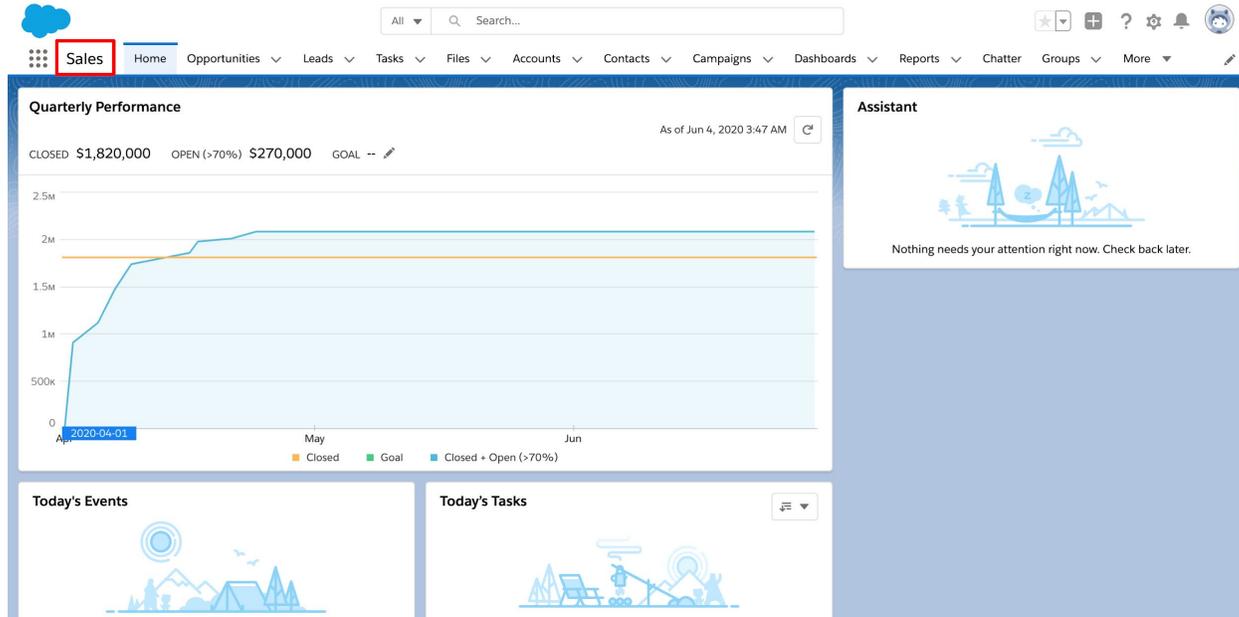
Survey Name	SURVEY-00013	Owner	Sheryl Briggs
Survey Code	101		
Survey Link	http://39.selectsurvey.net/salesforcetoday/TakeSurvey.aspx?SurveyID=IKH456		
Total Score	56		
Average Score	4		
Available Score	5		
Total Complete	14		

Additional details include 'Created by Sheryl Briggs, 7/23/2020, 11:34 AM' and 'Last Modified By Sheryl Briggs, 7/23/2020, 12:04 PM'. A red callout box labeled 'View Results' points to the 'Total Score' field. To the right, the 'Survey Score' section features a gauge chart showing a score of 4 out of 5, with a 'Refresh' button above it.

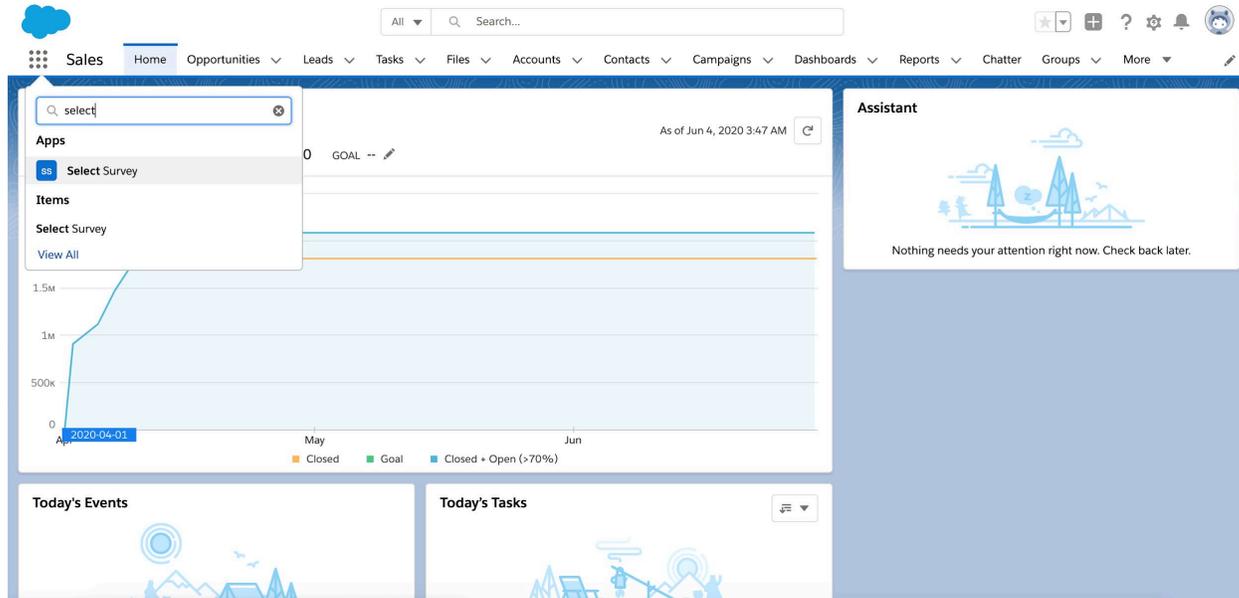
Getting Around Salesforce

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

The screenshot shows a CRM interface with a navigation bar at the top. The 'Select Survey' tab is highlighted with a red box. Below the navigation bar, there is a search bar and a 'New' button. The main content area displays a table titled 'Recently Viewed' with 9 items. The table has columns for Campaign Name, Parent Ca..., Type, Status, Start Date, End Date, Responses..., and Owner Alias. Each row has a checkbox and a dropdown arrow.

	Campaign Name	Parent Ca...	Type	Status	Start Date	End Date	Responses ...	Owner Alias
1								
2								
3								
4								
5								
6								
7								
8								
9								

Create A Select Survey Campaign

Click Select Survey Tab

The screenshot shows the 'Create new campaign' form in the CRM. The 'Select Survey' tab is active. The form has two dropdown menus: 'Select a Survey' with the value 'Survey Test 1' and 'Select a Campaign' with the value 'CAmp Test New 2'. Below the dropdowns is a red button labeled 'Create new campaign' and a blue button labeled 'Submit'.

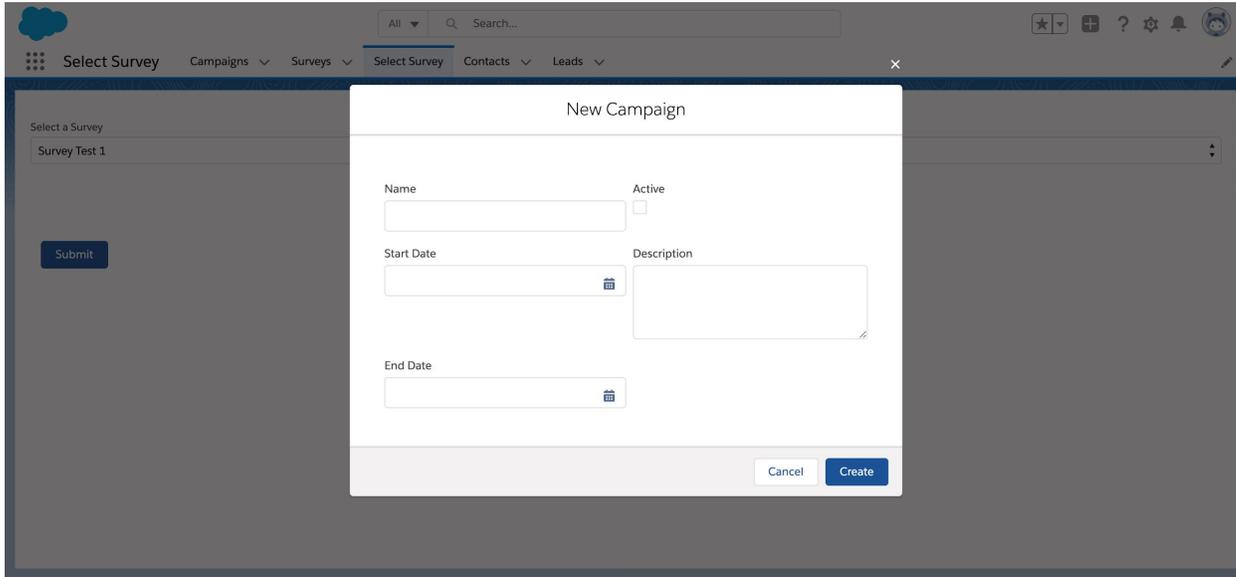
From Select Survey Field, it will show all the available surveys to use on real time callout basis

The screenshot shows the Salesforce user interface for the 'Select Survey' page. At the top, there is a navigation bar with the Salesforce logo, a search bar, and several utility icons. Below the navigation bar, there are tabs for 'Select Survey', 'Campaigns', 'Surveys', 'Select Survey', 'Contacts', and 'Leads'. The main content area contains two dropdown menus: 'Select a Survey' and 'Select a Campaign'. The 'Select a Survey' dropdown is highlighted with a red rectangular box and shows 'Survey Test 1' as the selected option. The 'Select a Campaign' dropdown shows 'CAmp Test New 2' as the selected option. Below these dropdowns, there is a red button labeled 'Create new campaign' and a blue button labeled 'Submit'.

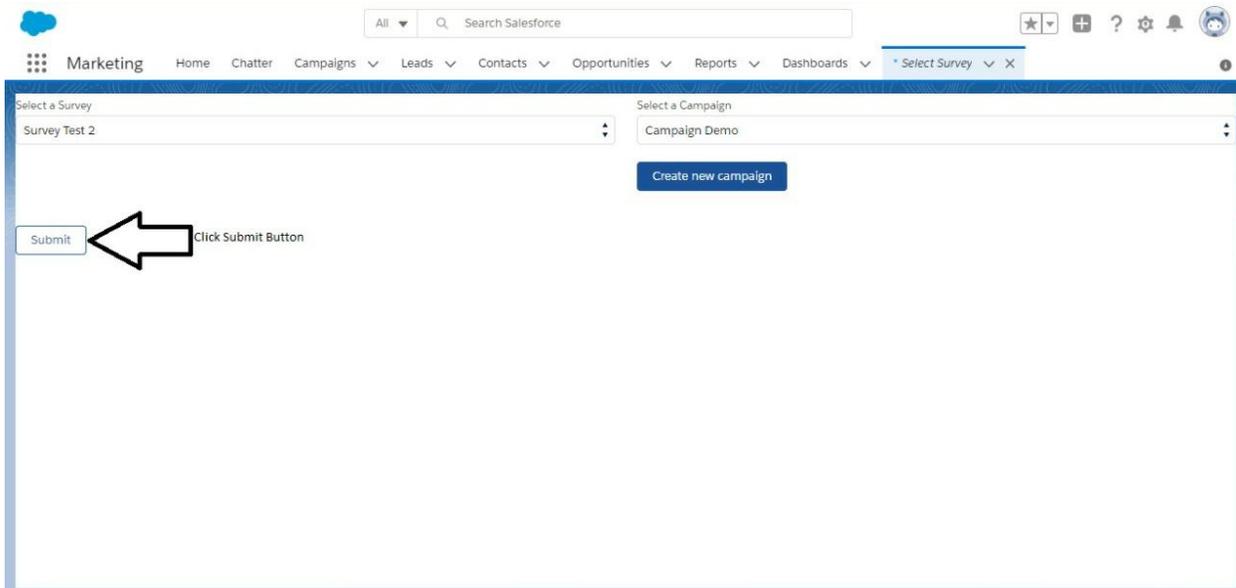
From Select Campaign Field, it will show up all available Campaigns in Salesforce.

The screenshot shows the same Salesforce user interface as the previous one. In this view, the 'Select Campaign' dropdown menu is highlighted with a red rectangular box and shows 'CAmp Test New 2' as the selected option. The 'Select a Survey' dropdown remains unchanged, showing 'Survey Test 1'. The 'Create new campaign' and 'Submit' buttons are also visible in the same positions.

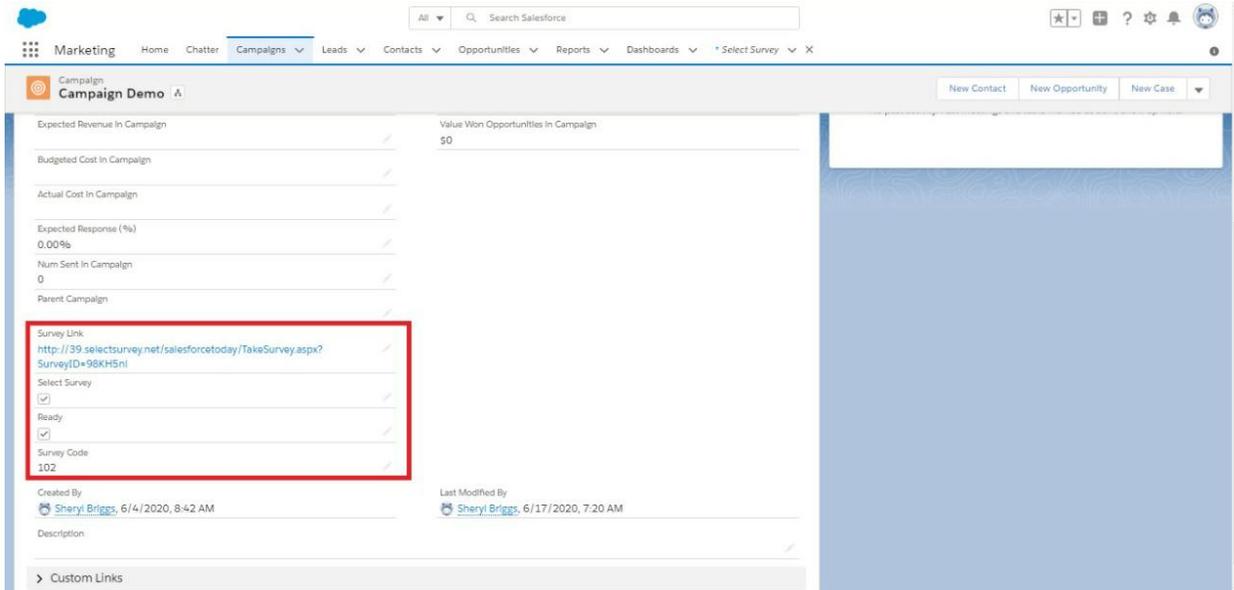
If you do not want to choose a campaign, you can create new campaign by clicking button "Create New Campaign". It will create new campaign in Salesforce and will show up on select tab screen



After selecting campaigns, surveys click submit. It will redirect user to campaign screen.

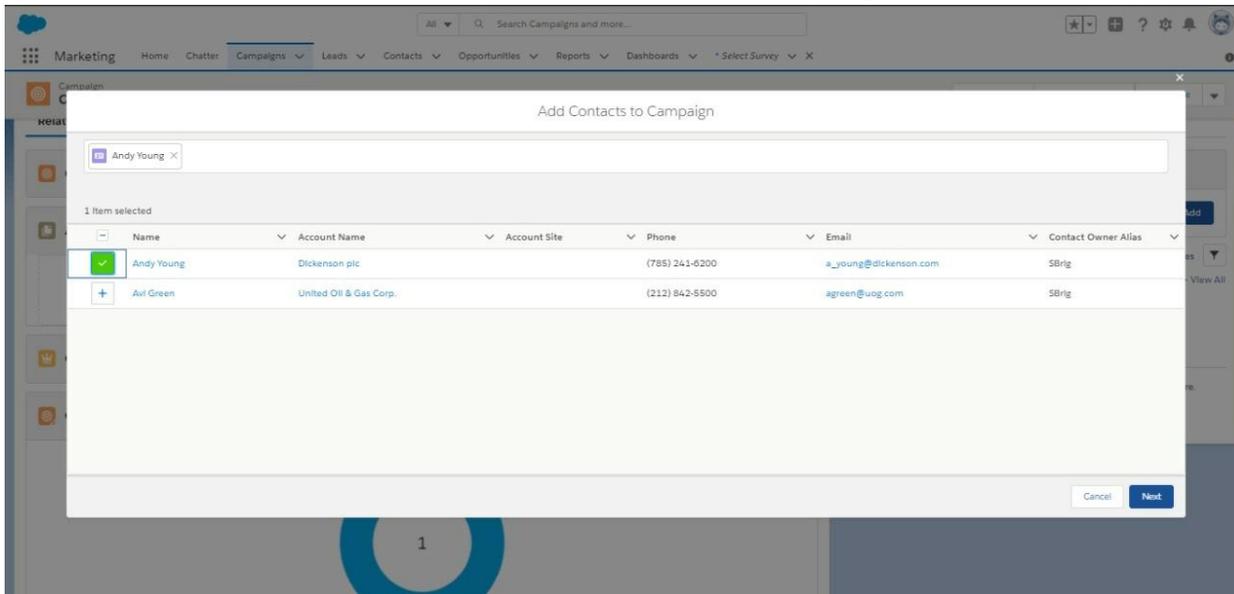


On Campaign, few fields would be populated after it gets redirected to Campaign record

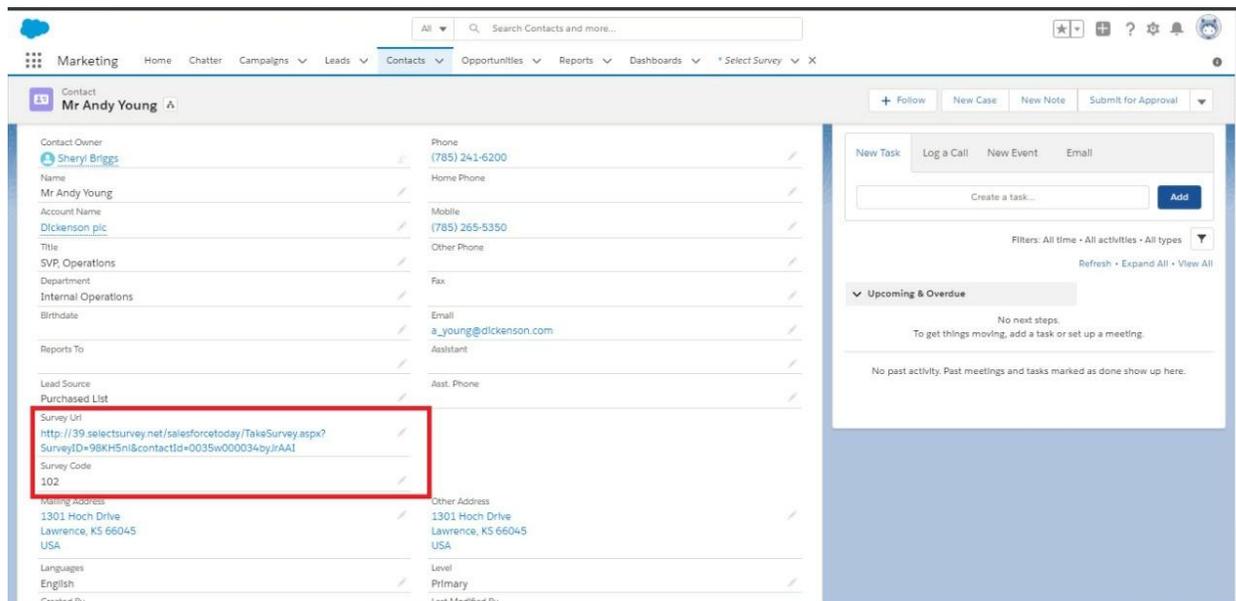


Add New Campaign Members To New Campaign

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

