SalesForce How To:

Use Process Builder to Send AskNicely Surveys

With Salesforce's powerful Process Builder, you can configure AskNicely surveys to be sent when virtually any event occurs in your business. A common use is to send a survey when a case is closed. Here's how:

1. Find or create your address for AskNicely's Email to Survey

1. In AskNicely, click the gear icon in the bottom

    left and select "Integrations".

2. In the list of integrations, select "Email to Survey".

3. Click the Activate button if displayed.

4. Note what address is displayed.
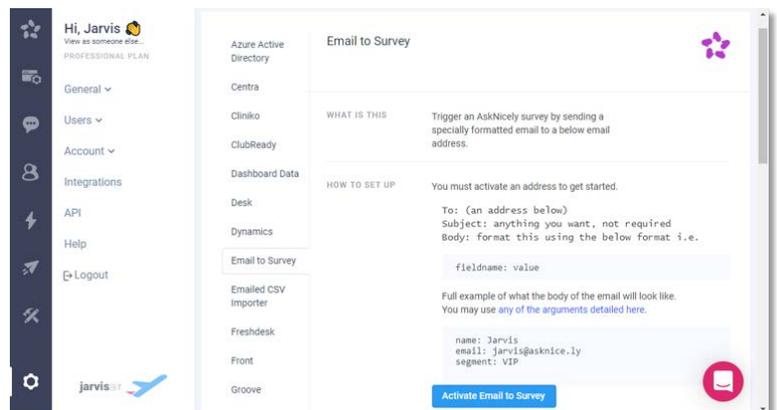
2. Create the email template in Salesforce

Note: This configures an email sent from Salesforce to AskNicely; this is not the email that will be sent to contacts.

1. Go to Email Templates in Salesforce Setup and create a new template, setting type to text.

2. Tick "Available for Use"

3. Set the Subject to N/A.

4. In the Email Body, enter a line for each field you wish to send to AskNicely. Each line will begin with the AskNicely field name, have a colon (:) separator, and end with the value for that field (usually a merge field value).

    • For a regular case-closed survey, use the following Email Body:

    ```
    name: {!Contact.Name}
    email: {!Contact.Email}
    sfcontactid: {!Contact.Id}
    sfcaseid: {!Case.Id}
    owner: {!Case.OwnerFullName}
    casenumber: {!Case.CaseNumber}
    ```

• We also recognise these special fields:

  • Salesforce-only: `sfaccountid`

  • Salesforce-only: `sfleadid`

  • General: `firstname`

  • General: `lastname`

  • General: `segment`

  • To delay sending the survey by [x] minutes (*must* be formatted in minutes), add: `delayminutes: [x]`

  • To ignore the limit on recently sent surveys, add this line: `triggeremail: true`

• Any other fields included will be treated as custom data.
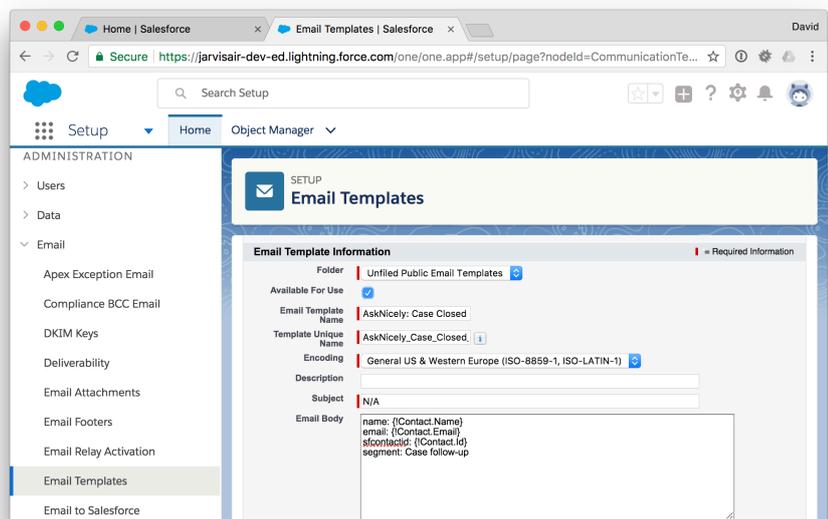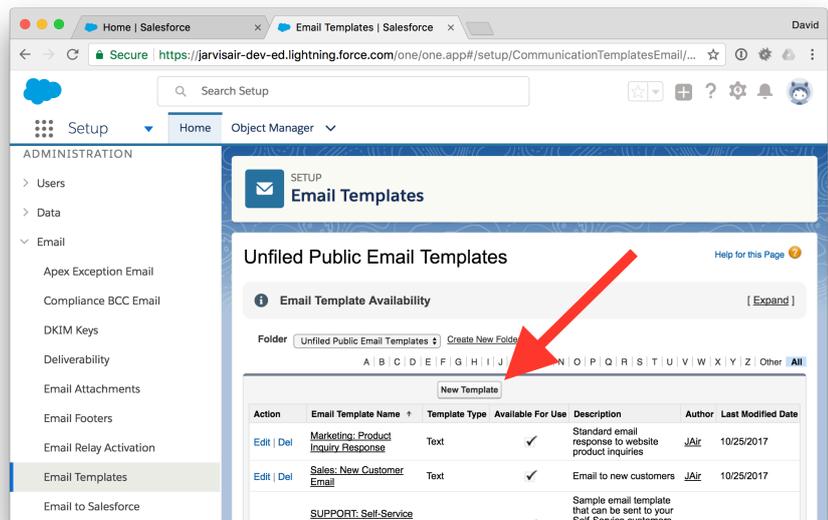
3. Create the email alert in Salesforce

1. Go to Email Alerts in Salesforce Setup and create a new email alert.

2. Select the appropriate Object. ("Case")

3. Select the email template created above.

4. Skip Recipient Type & Recipients.

5. In Additional Emails, enter your AskNicely email to survey address.
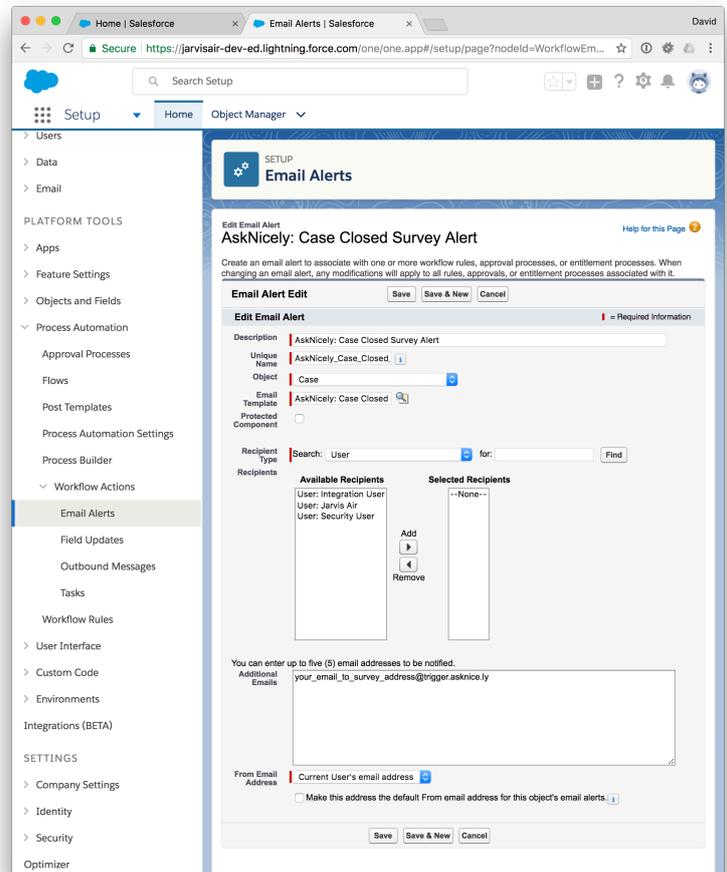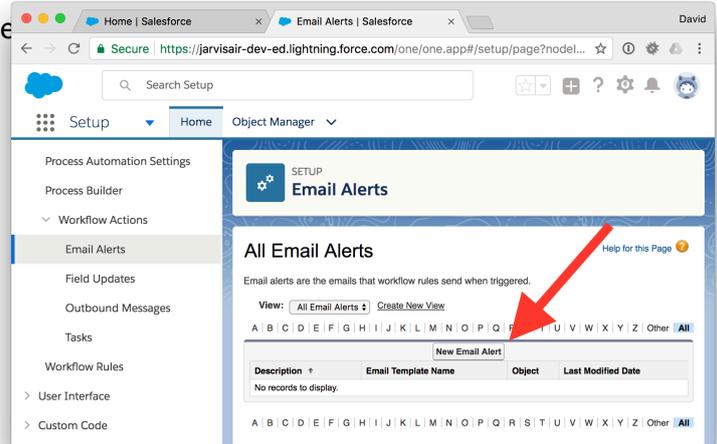
4. Create the Salesforce's Flow Builder

To trigger your process, you will need to setup Salesforce Flow Builder.

You can utilise the Flow Builder to deliver an email alert when record changes in your account.

Please get in contact with your Salesforce Administrator to ensure your Flow Builder is setup correctly.

Need help troubleshooting?

It can be a good idea to check that the process is working as intended. Here's how you can do that for the above example:

1. Add your personal email address to Additional Emails on the email alert created above.
2. Create a test contact with your email address (or use an existing contact record that has your email address).
3. Perform the actions that trigger the process:
    1. Create a case.
    2. Associate it with your test contact.
    3. Set the case status to Closed.
4. Check your inbox:
    1. You should have an email from Salesforce. Confirm that the field names and values are what you expected.
    2. You may also have an email from AskNicely, unless the contact rules prevented you from being contacted too frequently.
5. Check AskNicely:
    1. Login to AskNicely. (https://start.asknice.ly/login/)
    2. Select the People tab.
    3. Confirm the contact is listed with the expected name, email, and custom data.
6. Make adjustments as appropriate.
7. Clean up:
    1. Delete the person from AskNicely's People tab.
    2. Delete the test case and contact.
    3. Remove your email from the alert's Additional Emails.