Macorva

INSTALLATION GUIDE

Macorva Salesforce application overview

v1.2

support@macorva.com

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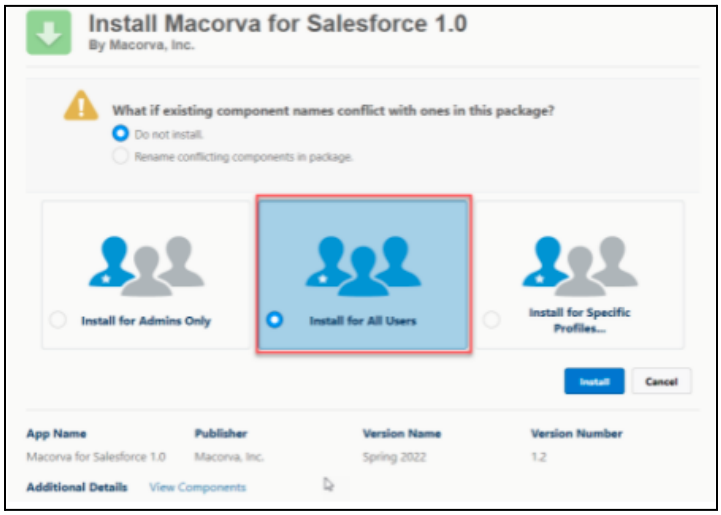
Overview

Macorva provides engaging, responsive customer surveys that capture actionable customer experience data. Users define between one and hundreds of different surveys in Macorva. These can be viewed by going to https://app.macorva.com/, clicking Configure, then CX surveys. In general, Salesforce triggers a survey to be sent by Macorva when a support ticket closes (SF sends the customer name, email, or phone number to Macorva, and Macorva sends the specified Survey ID to the customer via SMS or email), when a customer account is closed, etc. Each survey has an ID. Salesforce IT setup involves entering the API credentials and configuring one or more Flows to automatically trigger surveys to be sent. Macorva's SF app will automatically retrieve survey responses in a Survey object and link them as a Related item in the Case that triggered them.

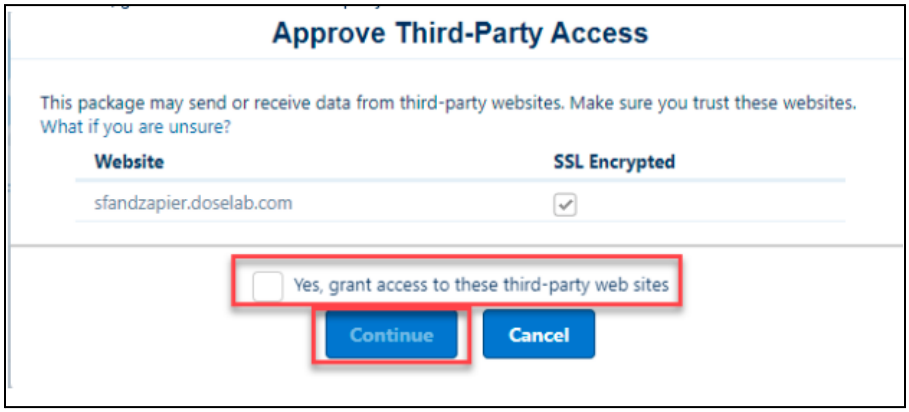
Salesforce application installation

Install the Macorva unmanaged application (15 minutes)

- Login into Salesforce as a System Admin user
- Once the user is logged in, copy the following URL and hit enter:
    - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t3t000002lg8k
    - Note: If the Salesforce instance is a Sandbox, the URL will be:
        - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t3t000002lg8k
- Salesforce will ask for credentials. The user needs to have System Admin credentials.
- Once the credentials are accepted, the installation begins:
- Select “Install for All Users” and click “Install”



- Select “Yes, grant access to these third-party web sites” and click “Continue”:



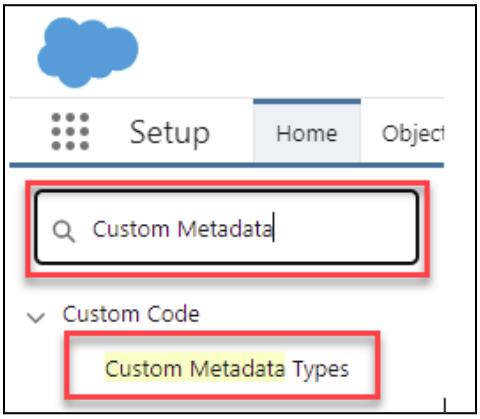
- Wait a few moments until this screen appears, then click Done:



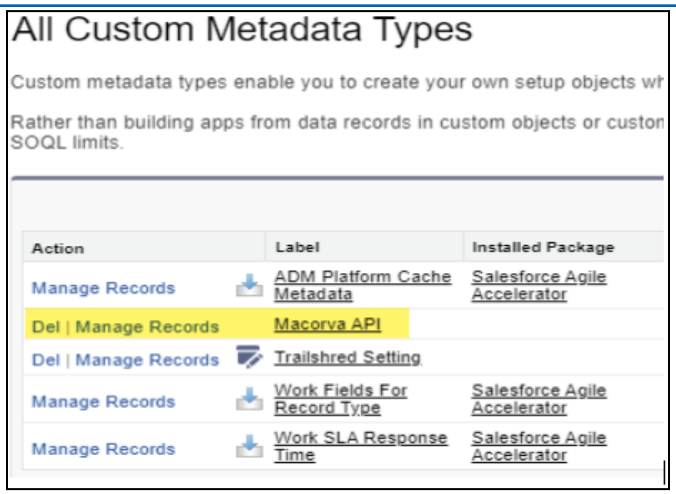
- The system will then be redirected to Salesforce.

Enter Macorva API credentials (15 minutes)

- In Setup, go to quick find (search bar) and enter “Custom Metadata”, then select Custom Metadata Types:



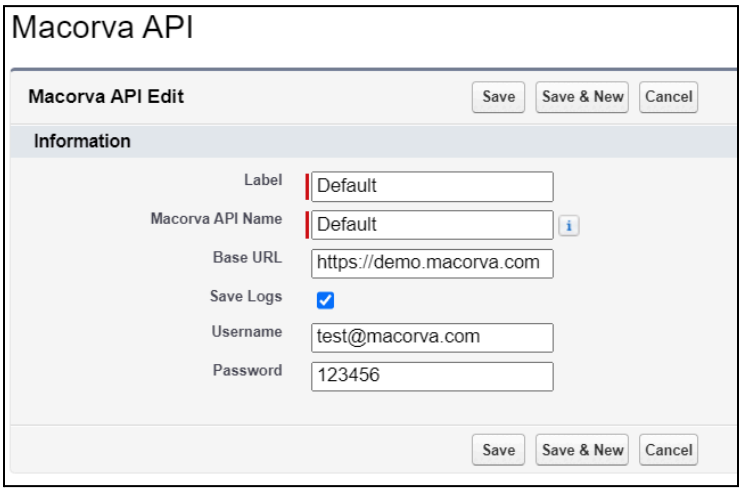
- Click “Manage Record” for Macorva API:



- Click “Edit” for the “Default” label:



- Enter your company’s URL, your API username / password and click Save. Contact support@macorva.com if you do not have your API credentials.

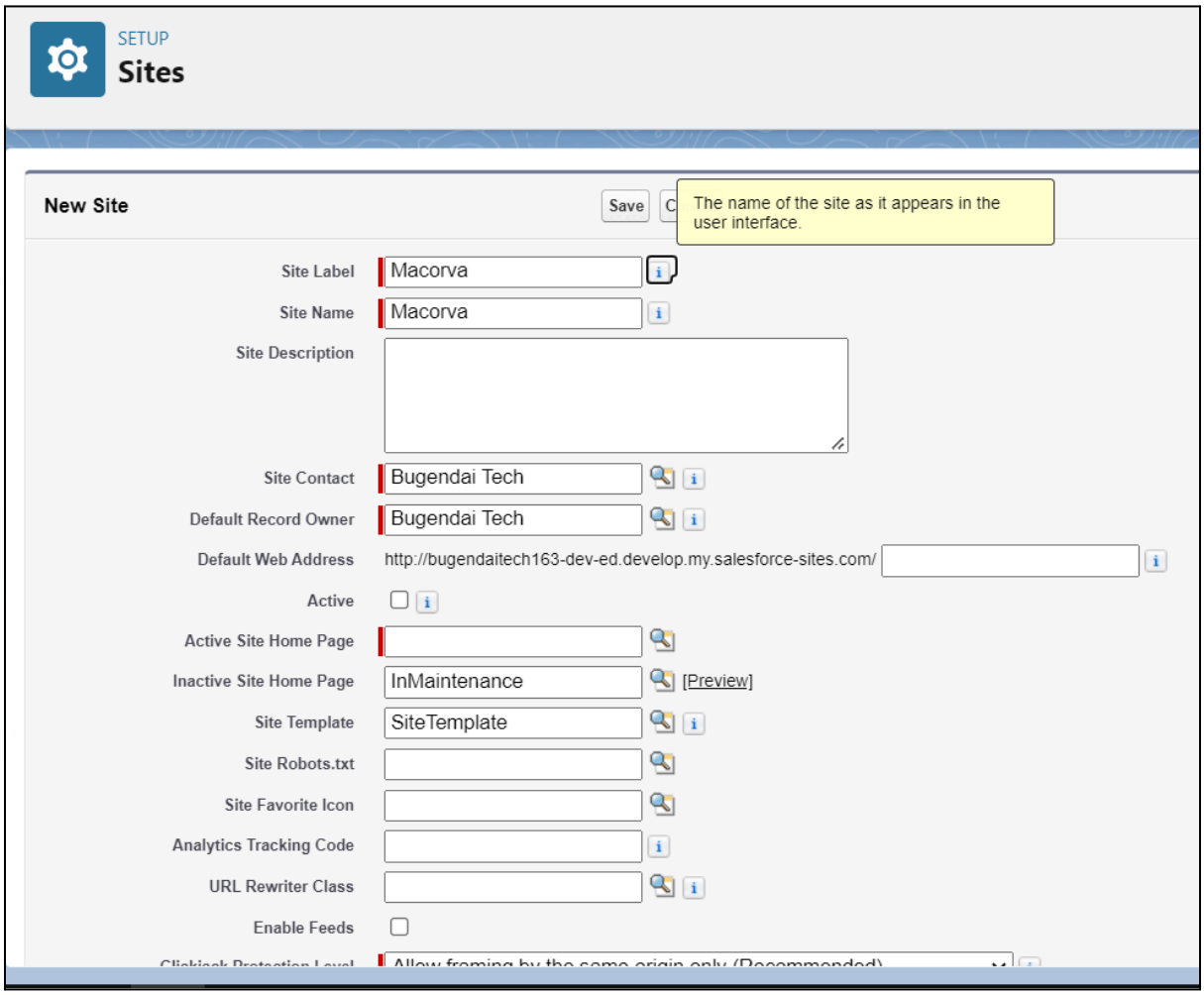


Create a page for webhooks and subscribe to events (15 minutes)

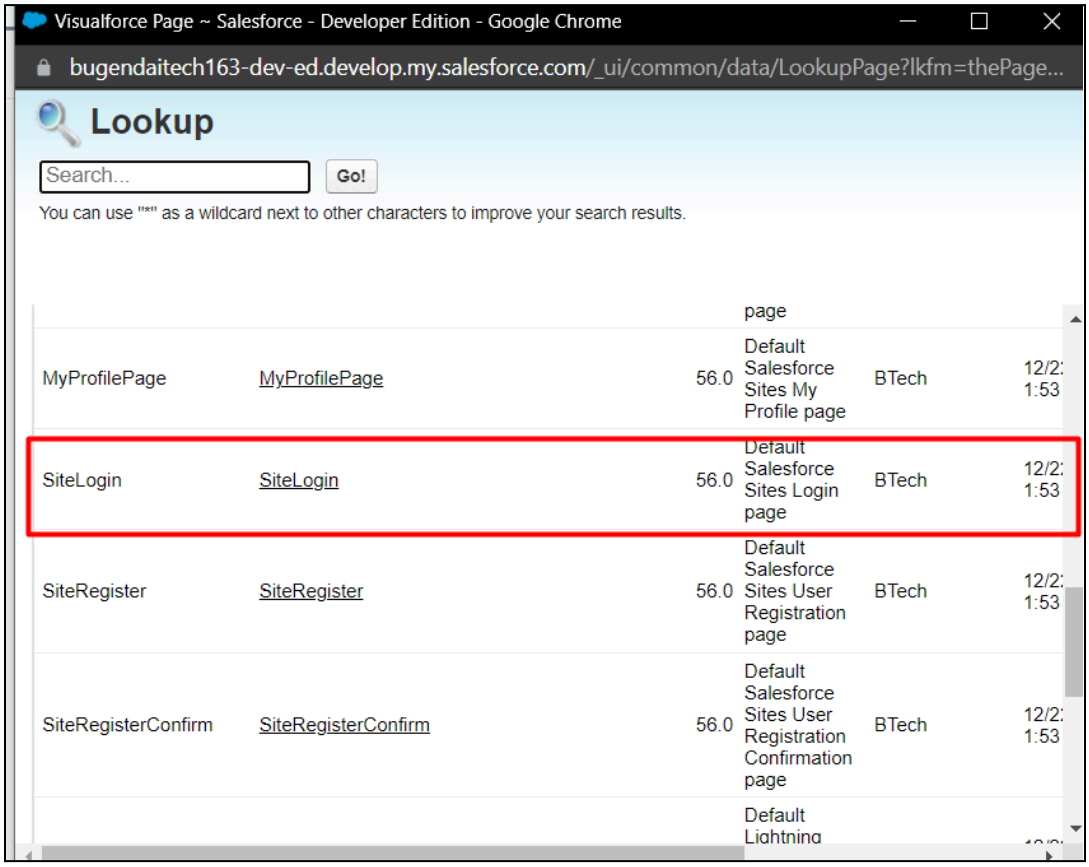
Macorva’s API uses a webhook to tell Salesforce when a user has completed a survey, so that the results of the survey can be updated in Salesforce. In order for this to happen, you need to create a webpage in Salesforce that will be used to receive the webhooks

Create a Force.com site for receiving webhook notifications

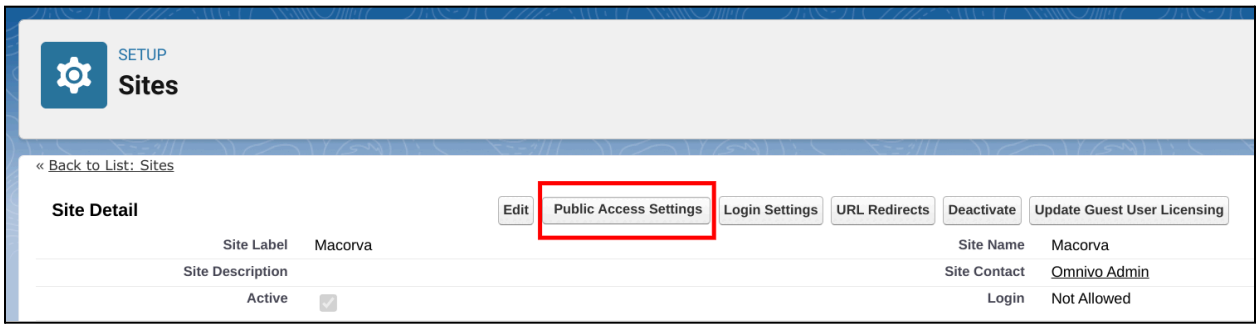
- Go to Setup. Type “sites” in the quick find search bar
- Click on “Sites” in the search results
- On the Sites page, scroll to the bottom and click the “New” button.
- A “New Site” page will appear. Enter “Macorva” for the “Site Label”



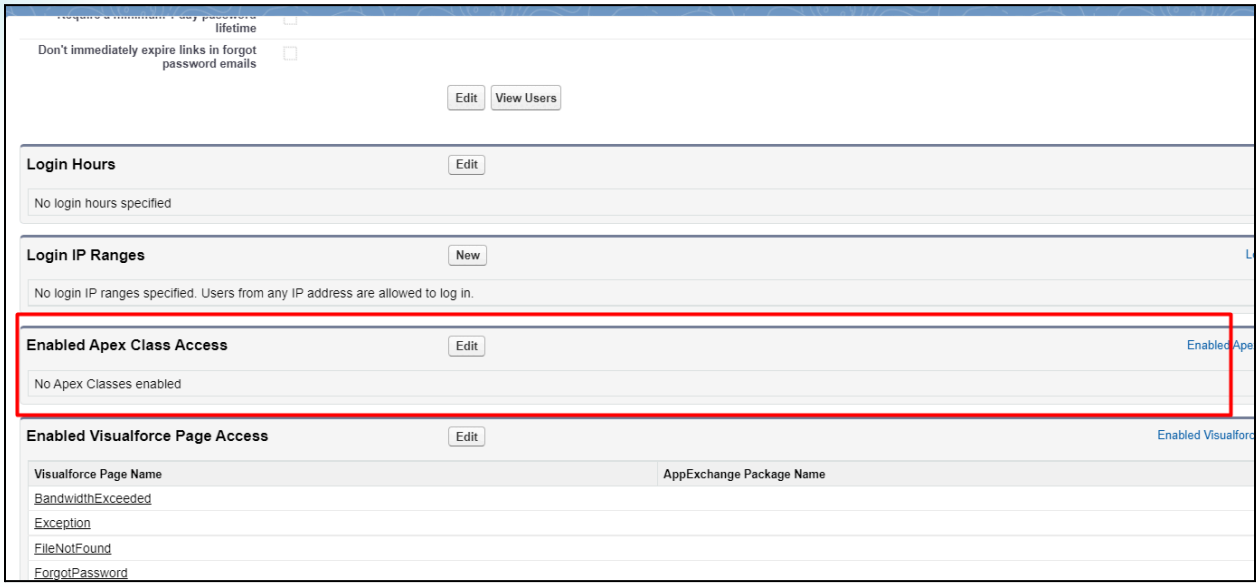
- Click the magnifying glass to the right of the “Active Site Home Page” and select “Site login”



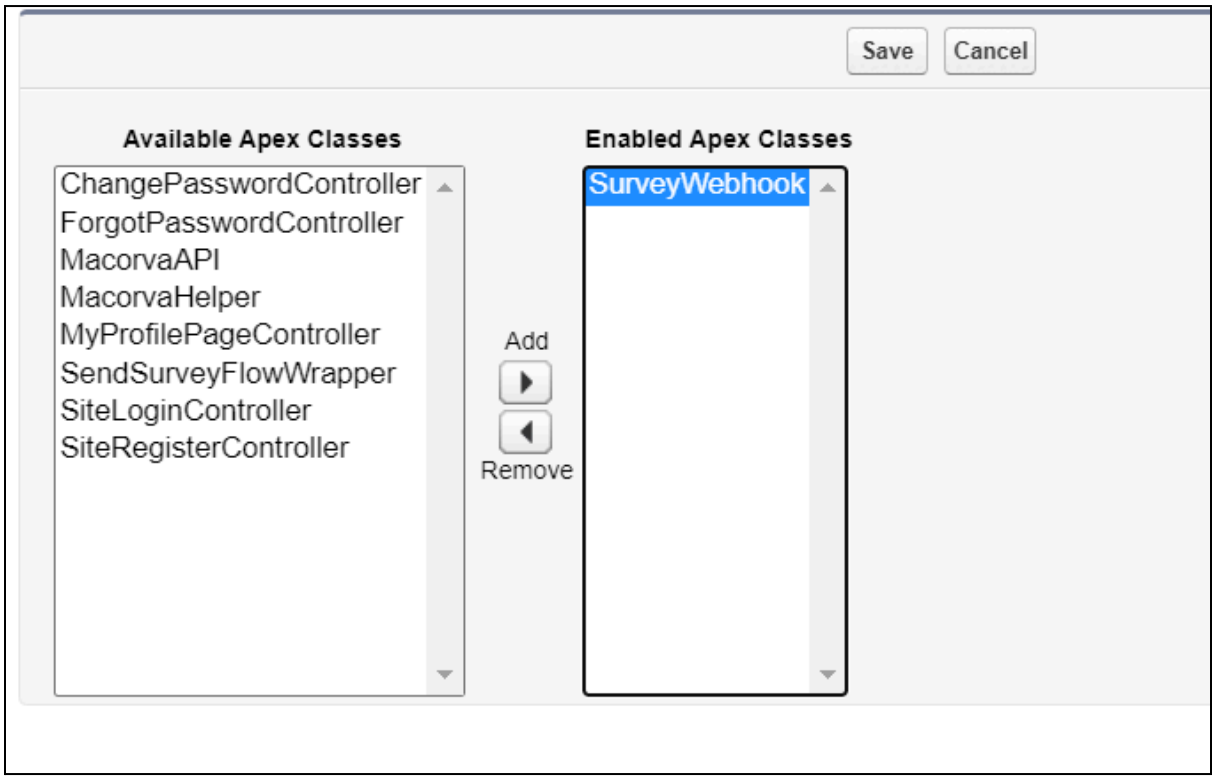
- On the “New Site” page, check the box next to “Active” to activate the page
- Click the “Save” button on the bottom of the “New Site” page.
- In the main “Sites” page, under the “New” button you previously clicked, click the word “Macorva” in the “Site Label” column.
- In the “Site detail” page that appears, click the “Public Access Settings” button



- Scroll down to “Enabled Apex Class Access”



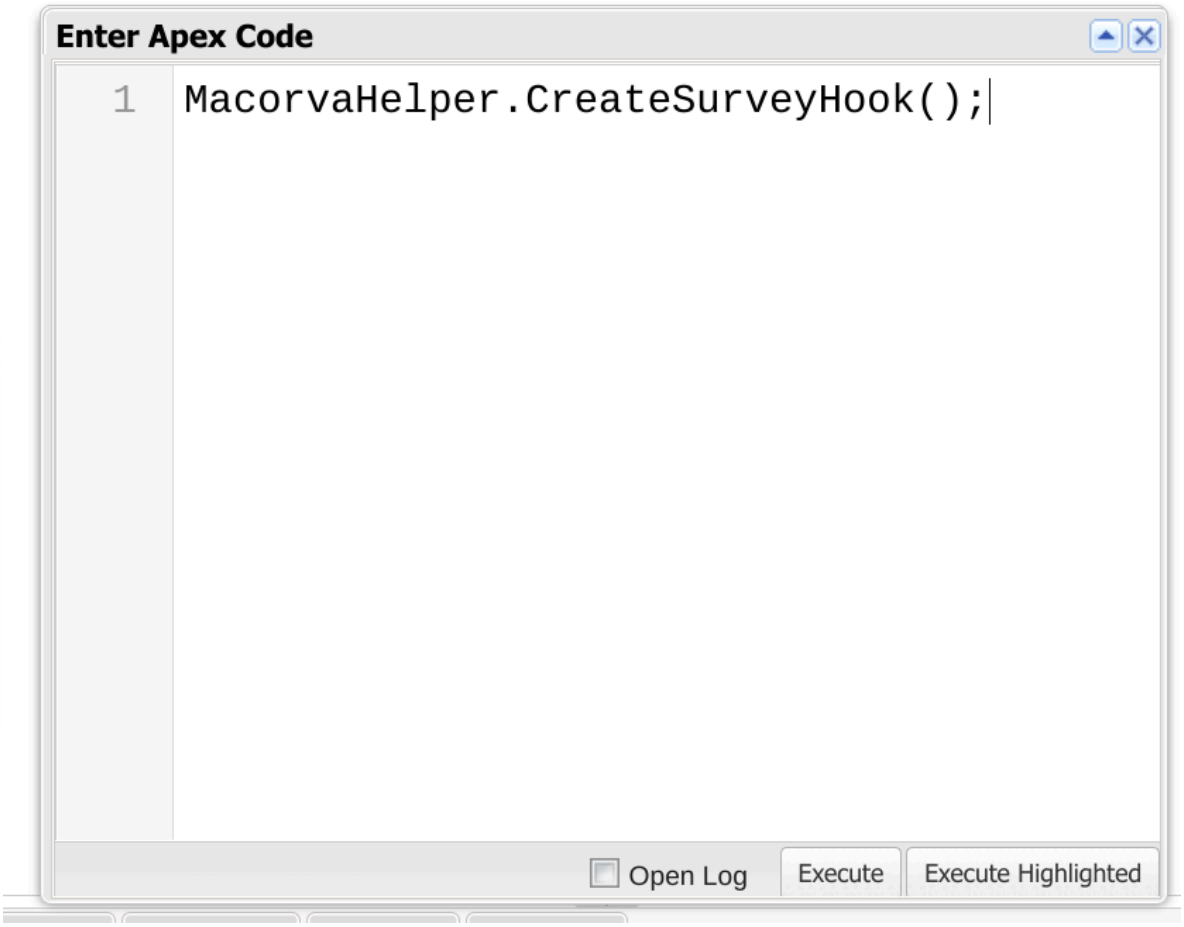
- Click the “Edit” button
- From “Available Apex Classes” select “SurveyWebhook” and click “Add”



- Click the “Save” button

Subscribe to the Macorva webhook

- From the main Salesforce page, click the gear icon in the top right corner of the screen
- Click “Developer Console” to open the developer console in a new window
- In the “Developer Console” window, press CTRL + E
- Copy and paste the command: MacorvaHelper.CreateSurveyHook();



- Click the “Execute” button.

You are now subscribed to Macorva’s webhooks so survey results can flow back into Salesforce. The process of creating a new site and subscribing to webhooks are one-time only and will not have to be repeated in the future.

If you receive the error “System.CalloutException: Unauthorized endpoint, please check Setup->Security->Remote site settings” you need to configure Remote Site Settings.

Steps:

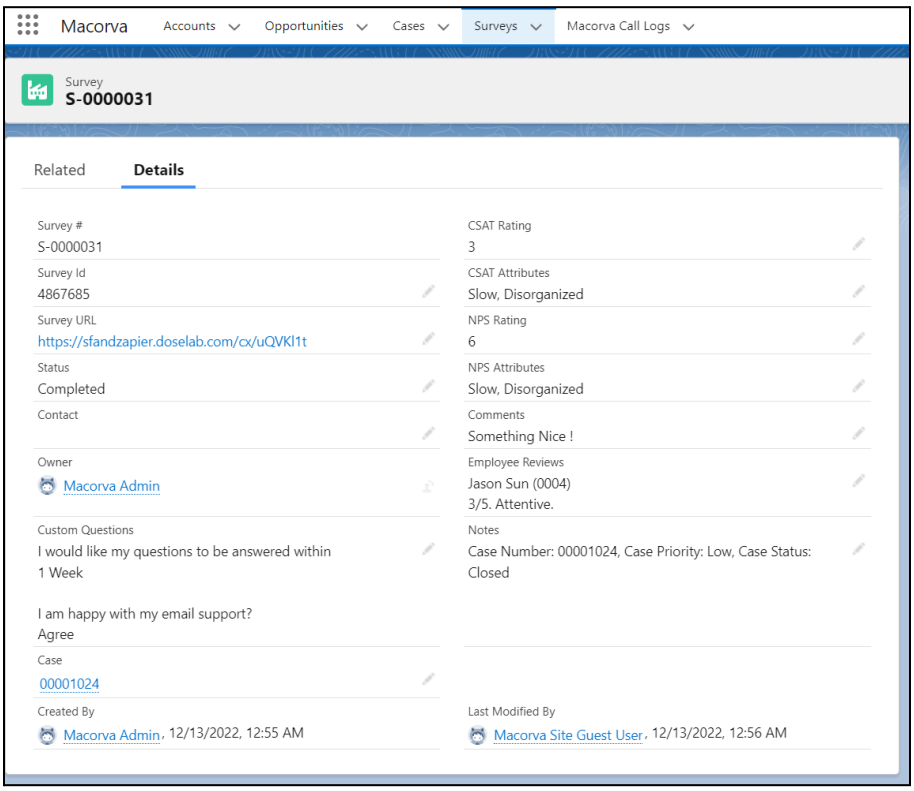
1. Identify the URL(s): Determine the external URL(s) that Salesforce needs to communicate with. This is your URL given to you by your CSM.
2. Navigate to Remote Site Settings:
    - In Salesforce, go to Setup.
    - Use the Quick Find box to search for "Remote Site Settings".
    - Click on Remote Site Settings under the Security section.
3. Check Existing Settings: Before adding a new remote site, check if the required URL is already listed. If it is, no further action is needed for that URL.
4. Add a New Remote Site:
    - If the required URL is not listed, click New Remote Site.
    - Enter a Remote Site Name that is descriptive and helps you identify the service (e.g., "MacorvaAPI").
    - In the Remote Site URL field, enter the full URL of the external service.
    - Optionally, provide a description for clarity.
    - Ensure that the Active checkbox is selected to enable communication.
    - Click Save.

Testing and Verification: After adding the new remote site(s), retest the functionality that previously encountered issues. If the problem persists, double-check the URL(s) provided in the Remote Site Settings for accuracy and ensure that there are no typos or omissions.

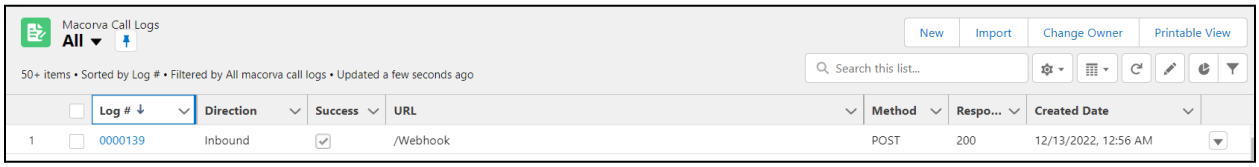
Application overview

Automatically created objects

- Macorva app
  - The app will show Accounts, Opportunities, Cases, Surveys and the Macorva logs.
- Flows
  - Send surveys when a case is Closed (inactive)
    - This will send a survey that is associated with the Case and the Case's contact.
    - It will send the survey when the Case is closed.
  - Send survey, no contact attached (inactive)
    - This will send explicitly the name, phone and email, and is not associated with a contact. This is for testing purposes only.
  - The user can activate the sample Flow, copy it to create a custom flow
  - Each flow needs to be customized with the survey_id from Macorva
  - To learn more about Flows, click here: Salesforce Help
- Survey object
  - Survey objects hold the results of every Macorva survey sent. They are linked to the Case or the Account that triggered them, assuming they were created as part of a Flow.



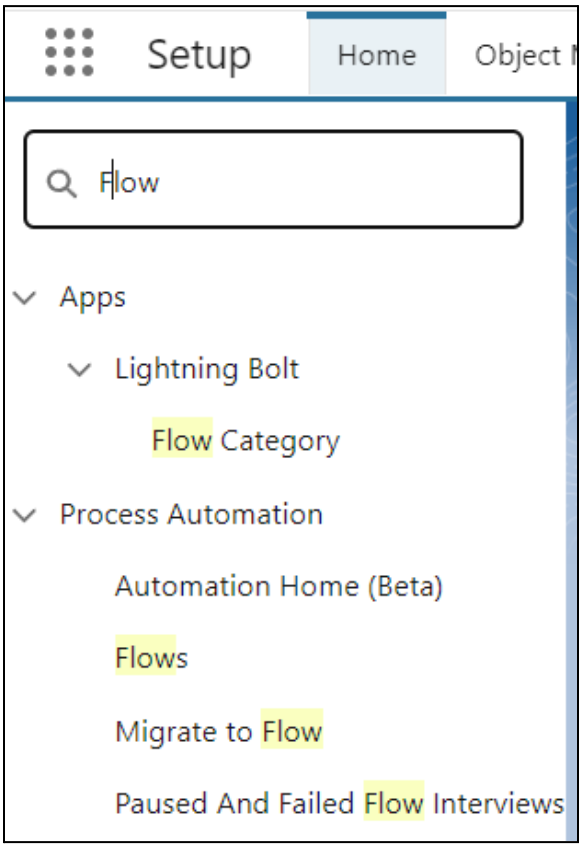
- Macorva Call Logs
  - Macorva Call Logs register all the API logs and the result of each call



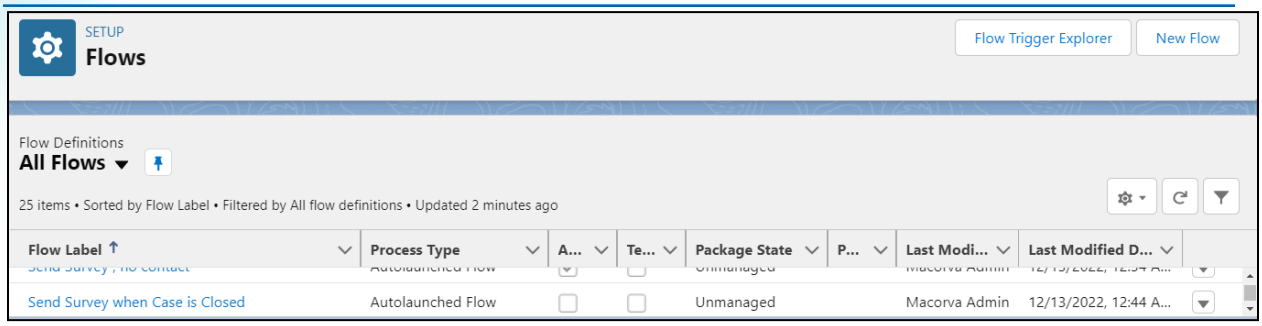
Customizing a Flow to send surveys (30 minutes)

Now that the app is installed, you're familiar with the newly created objects, it is time to configure a Flow to automatically send surveys when something in Salesforce happens. The most common trigger is sending a survey when a Case is closed to ask about how satisfied the customer was with the support they received, and the agent providing the support. We will load the default Flow, edit it to work with your institution, and discuss other common configuration steps.

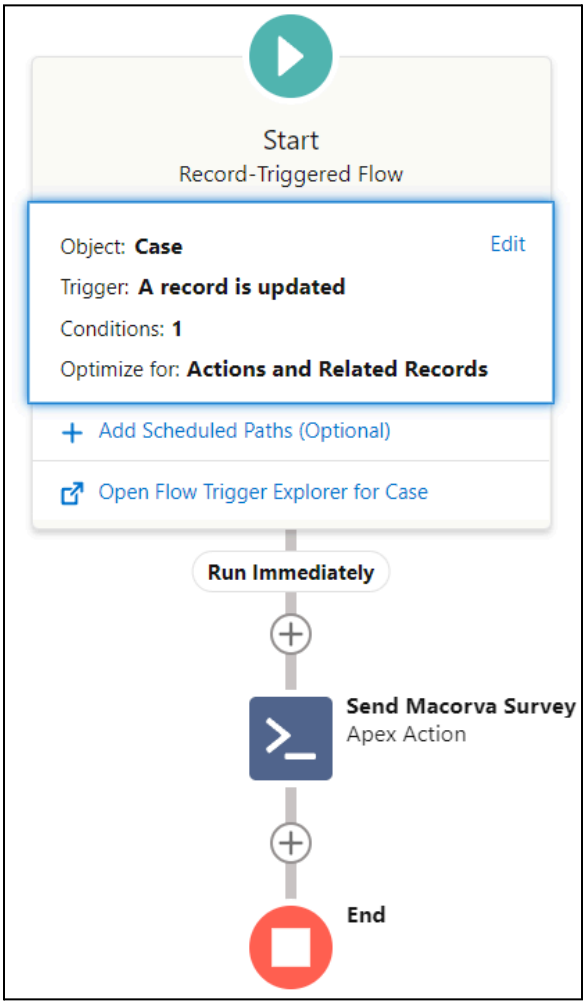
- Go to the Salesforce setup page and type "Flow" in the quick search bar:



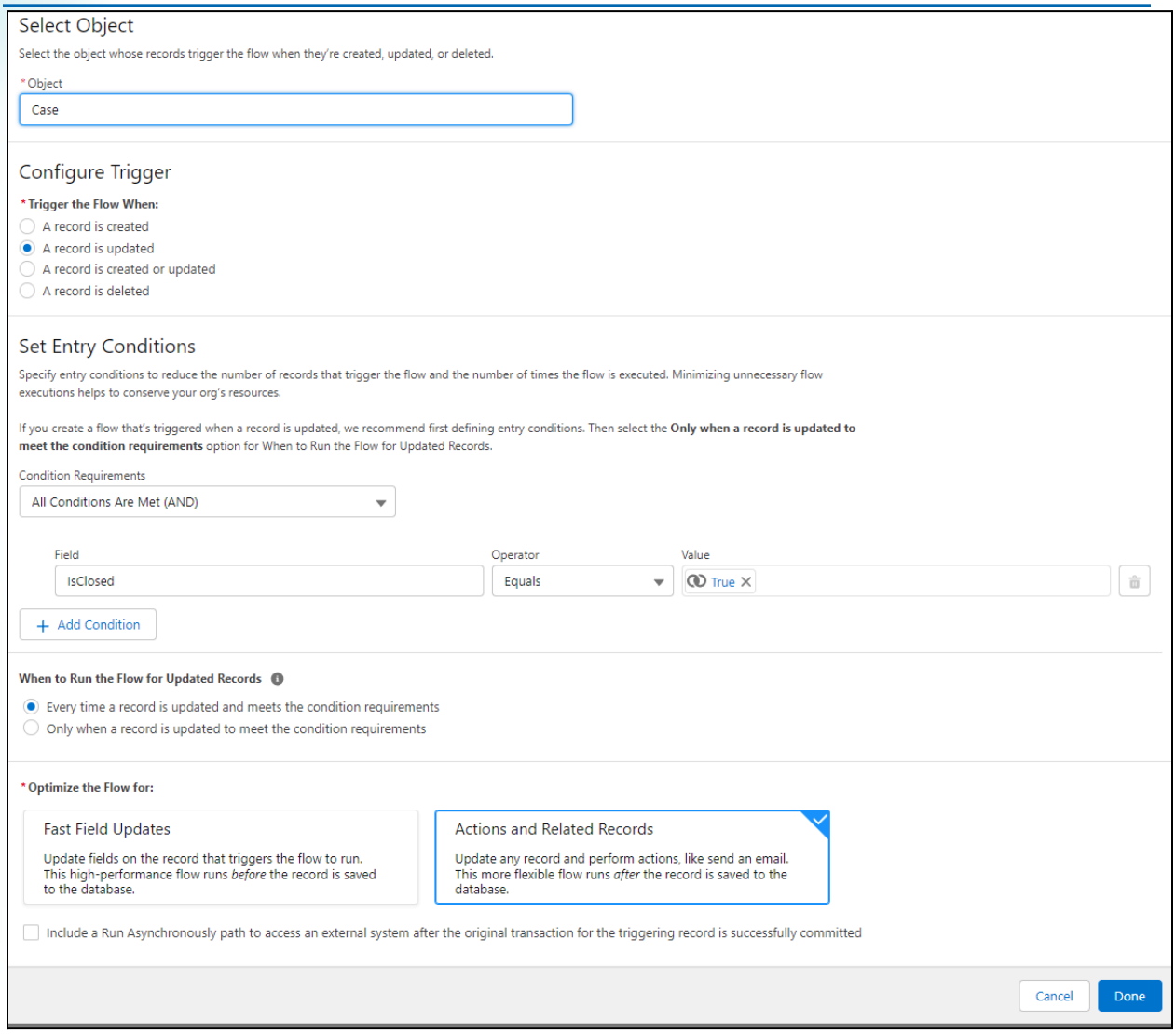
- Click Flows, then select "Send Survey when Case is Closed":



- At this point, you can view/edit the sample Macorva flow, or choose to click “Save As” to create a copy that you can edit. Let’s start by viewing the sample Flow:

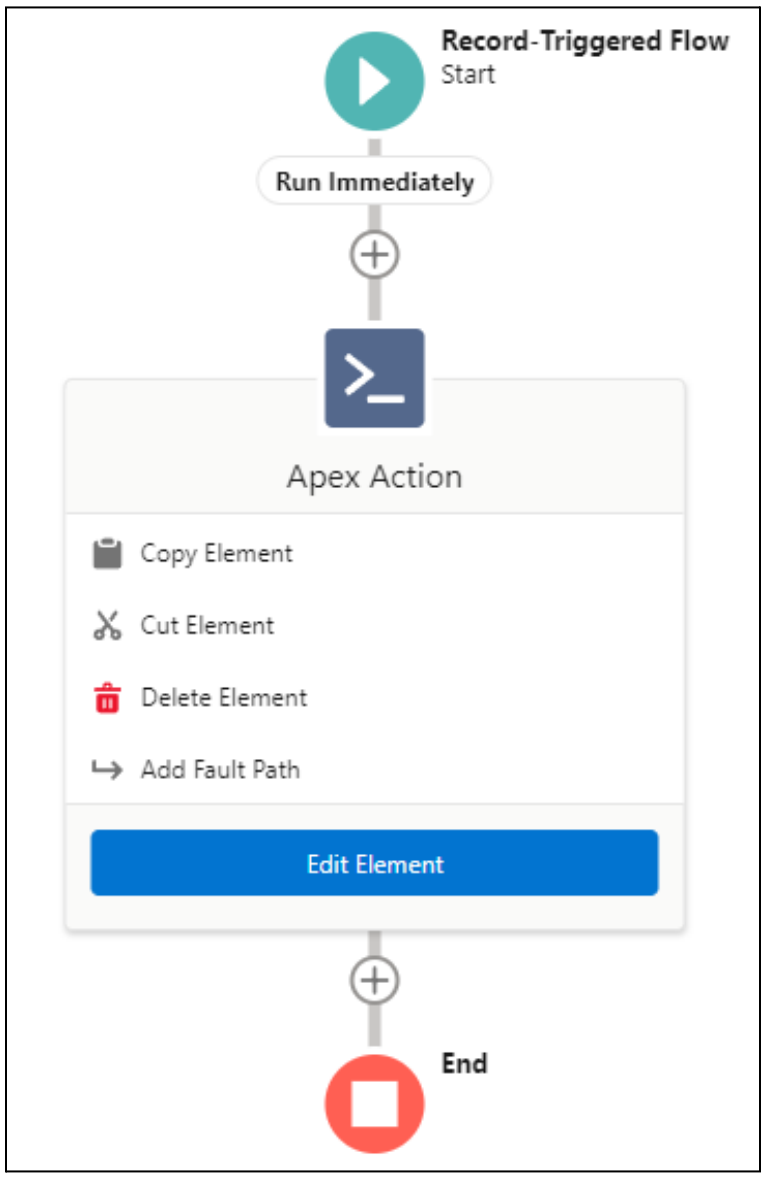


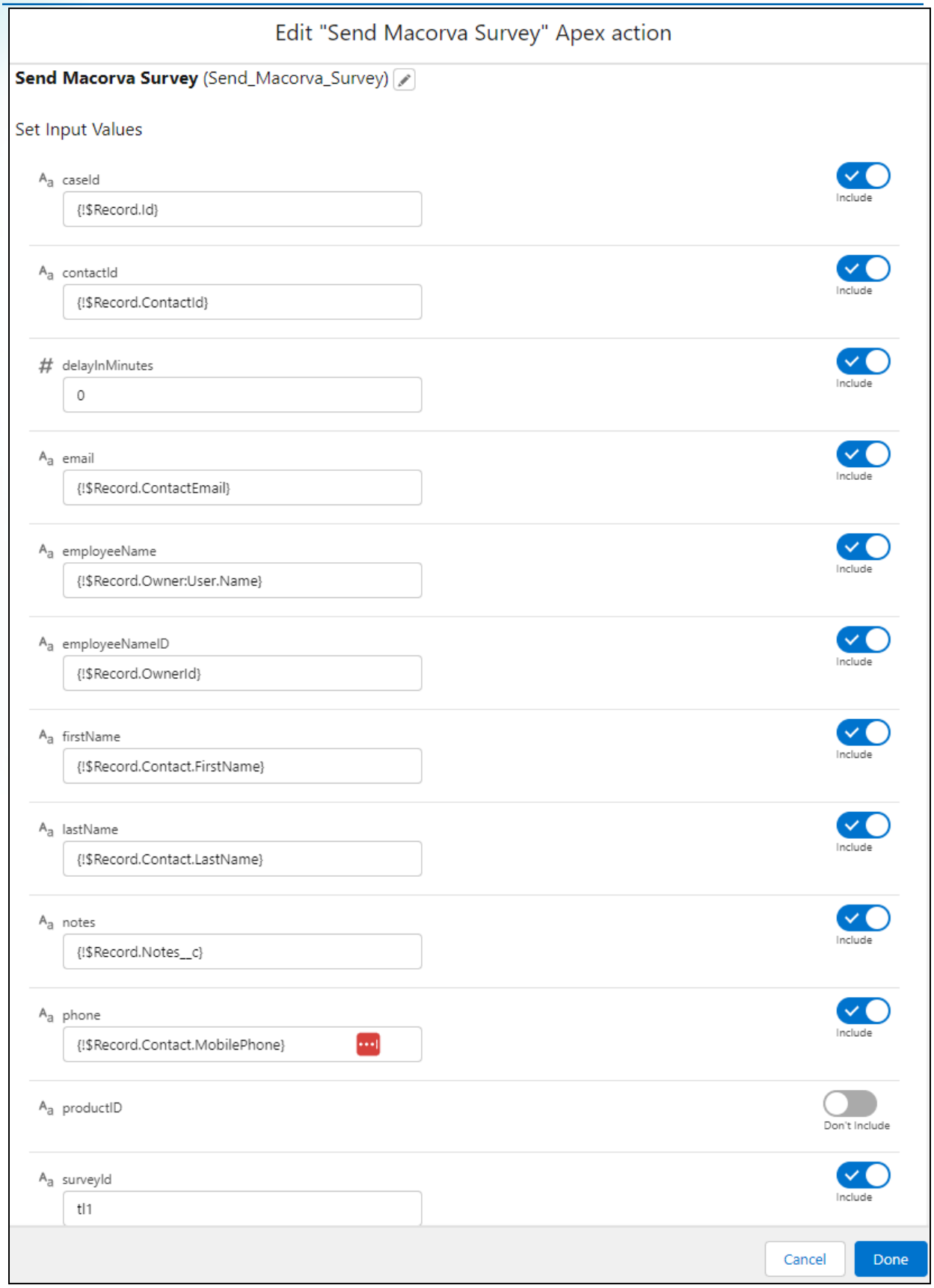
- Click “Edit” in the blue highlighted card to change the trigger:



- This is the default configuration that triggers a survey every time a Case's Status changes to "Closed". Here you could change the trigger to fire on different Case statuses, or even change it to fire when an Account is changed to a status. For now, click Done to close this window.

- Click the icon next to “Send Macorva Survey”, then click “Edit Element”:





- This screen shows what information from SF will be sent to Macorva via the API. Note that we need to send at least the customer's email or mobile number. If we send both, the customer will get an email and an SMS notification.

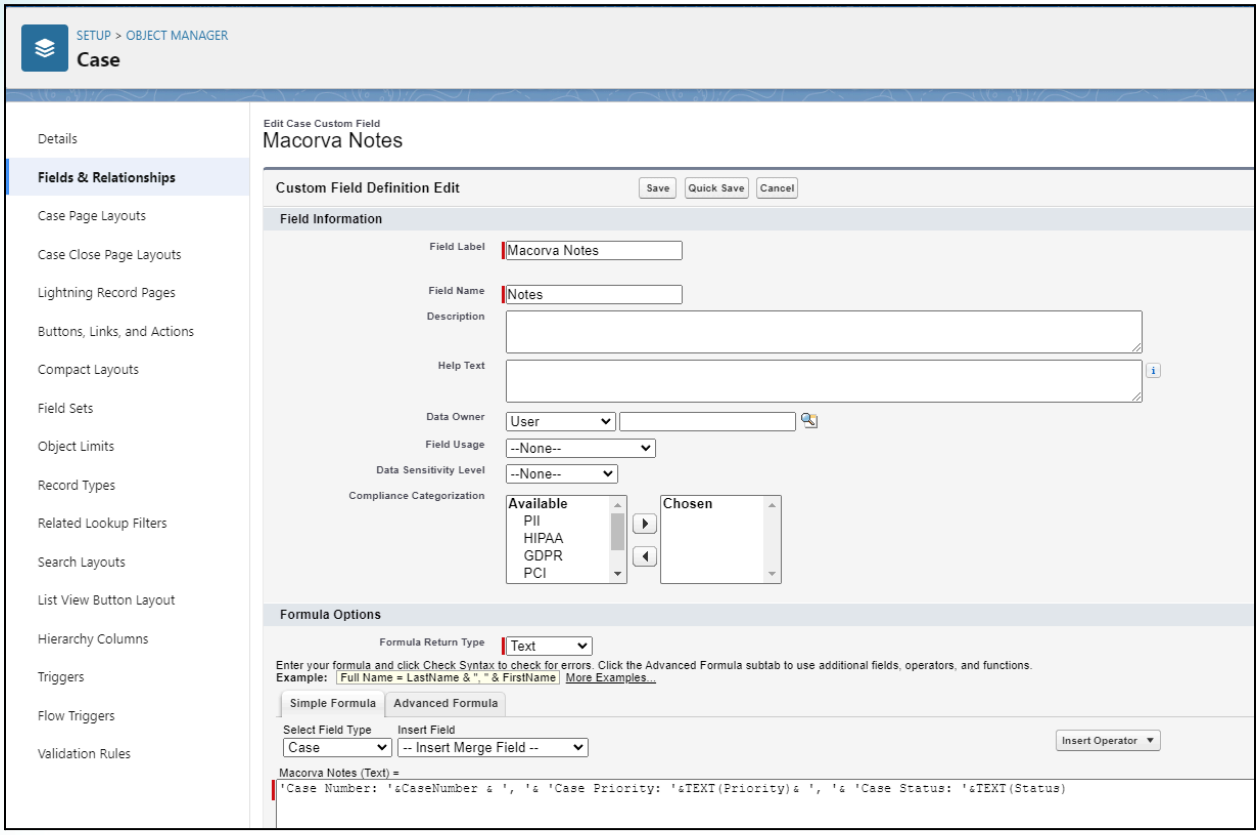
- IT typically does not need to edit this action, other than changing the “surveyId” to the “Survey ID” in Macorva that matches the survey that should be sent.
- You can enter a different value in “delayInMinutes” if you would like Macorva to pause before sending a survey. For example, you may want to send a survey 10 minutes after an interaction closes.
- After verifying the Flow has the correct settings, click “Activate”.
- You can now test the Flow by creating a Case and closing it. You should see new Survey objects created, new entries in the Macorva Call Logs, and the survey in the “Related” area of the Case.

Sending additional information to Macorva (30 minutes)

It is common practice to send more SF fields to Macorva so that detailed reports can be generated. For example, you may want to send the Geographic Region a customer is in, the Modality (phone, email, chat) the support used, etc. Macorva handles all extra variables in its “Notes” for each survey.
Macorva’s Notes do not have a predefined format. Macorva users create reports by searching for strings. For example, they may create a “Phone support” report by searching the Notes for “Modality: Phone”. Here is an example Macorva Note:

```
Case Number: 1234, Case Priority: High, Modality: Phone, Geographic Region: USA
```

Again, as long as the Note is repeatable the exact format does not matter.
Advanced survey users may also create surveys that display or hide certain questions depending on whether text is found in the “Notes” that are passed via the API. For example, in Macorva they can create a Dynamic question that asks “How long was your wait time?” only if the Notes contains the string “Modality: Phone”.
When the Macorva app is installed, it creates a “Macorva Notes” custom field in Cases. This is a formula field that can be edited to include any additional fields the survey team would like passed to Macorva. To edit this, go to Setup, search for “Object”, select “Object Manager”, select “Case”, select “Fields & Relationships”, select the “Macorva Notes” field, and finally click Edit:



Note the formula at the bottom. By default, the Notes field includes the Case Number, Case Priority, and Case Status. Simply append any other label and the field value at the end of the string. The default Flow is configured to send this Note to Macorva via the API.

Testing the Macorva application (2 hours)

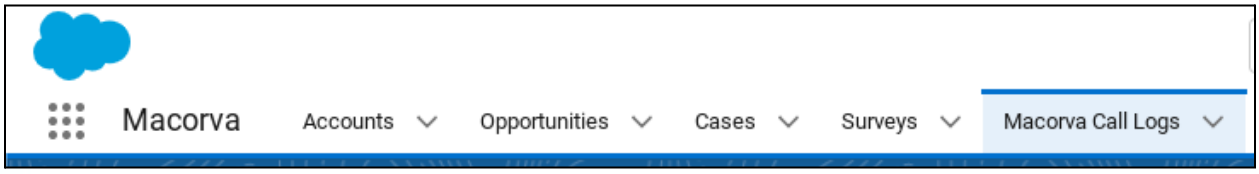
It is typical to do the initial configuration using a test Macorva survey ID that will not be sent to customers. You can also replace the customer email and/or phone fields in the Flow with hardcoded values that will be sent to your personal device, and update these to dynamic Salesforce fields after testing.

Troubleshooting (2 hours)

Check Macorva call logs

If surveys are not being automatically sent, or if responses are not being updated in Salesforce, the first step is to review Macorva Call Logs

- click the App Launcher in the upper left corner
- select the Macorva app, and go to the Macorva Call Logs tab.



This will show all the information being sent to the Macorva API, as well as information being sent back. Click on any row to see the details.

Check API Credentials

Ensure that the API credentials entered during the setup process are correct. Incorrect credentials can prevent Salesforce from communicating with external services.

- Navigate to Setup.
- Use the Quick Find box to search for "Custom Metadata".
- Click on Custom Metadata Types.
- Verify the Macorva API credentials are correctly entered.

Verify Workflow and Process Builder Configurations

Ensure that any workflows or processes related to the Macorva integration are active and configured correctly. Inactive or misconfigured workflows can lead to automation failures.

- Navigate to Setup.
- Use the Quick Find box to search for "Process Builder" or "Workflow Rules".
- Ensure all relevant processes and rules are active and configured to trigger under the correct conditions.

Inspect Salesforce Field Permissions

Ensure that all necessary fields related to the Macorva integration have the appropriate permissions for the users. Incorrect field permissions can prevent data from being

displayed or updated correctly.

- Navigate to Setup.
- Use the Quick Find box to search for "Field Accessibility".
- Verify that the fields used by the Macorva application are visible and editable by the appropriate profiles or permission sets.

Check Page Layouts and App Settings

Ensure that the Macorva components (e.g., custom fields, related lists) are added to the relevant page layouts. Missing components on the page layout can result in users not seeing the expected data.

- Navigate to Setup.
- Use the Quick Find box to search for "Page Layouts".
- Edit the page layouts for the relevant objects (e.g., Cases) to include Macorva components.

Review Debug Logs for Detailed Errors

For more complex issues, reviewing Salesforce debug logs can provide detailed insights into what's occurring behind the scenes.

- Navigate to Setup.
- Use the Quick Find box to search for "Debug Logs".
- Set up debug log tracing for the affected user and reproduce the issue to capture detailed log information.

Contact Support

If the issue persists after the above steps, encourage clients to reach out to your support team for further assistance. Providing detailed information, screenshots, and log files can help expedite the resolution process.



PUT YOUR DATA TO WORK

www.macorva.com 713-965-7560 support@macorva.com