

Macorva Salesforce application overview

Installation guide v1.2

support@macorva.com

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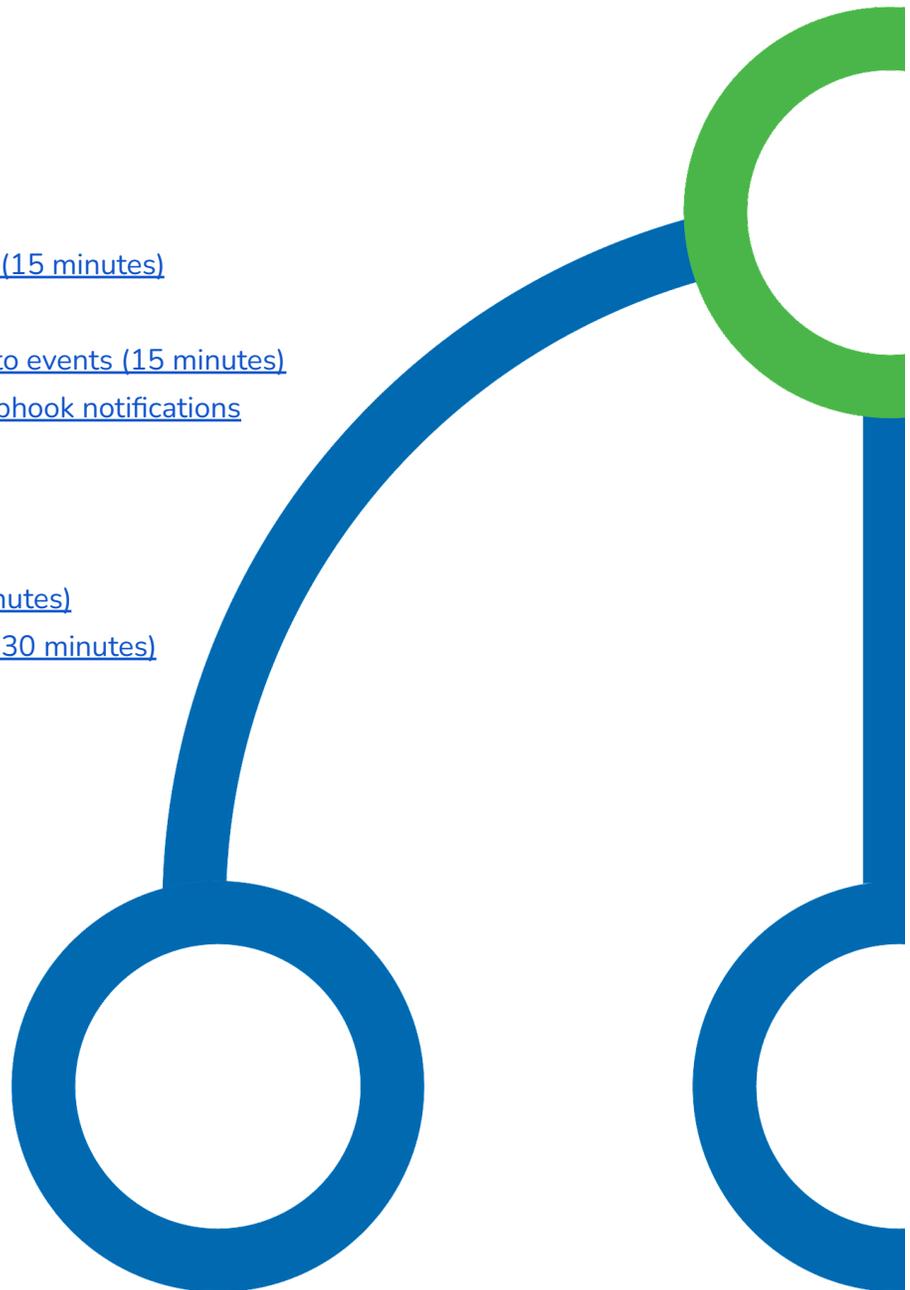
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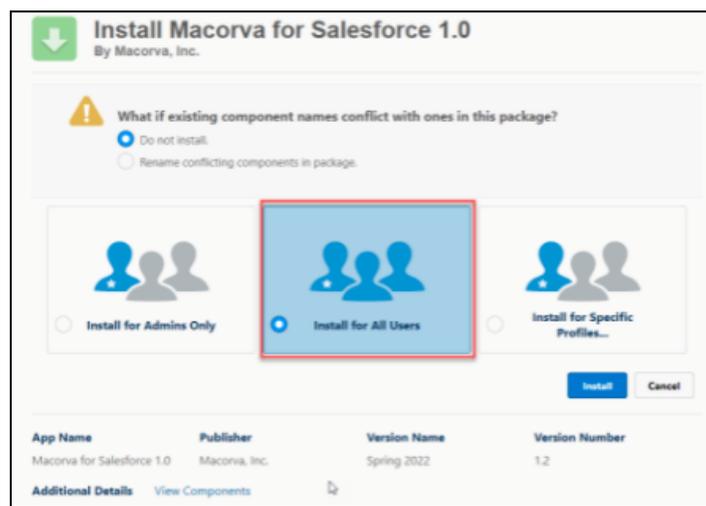
Overview

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.

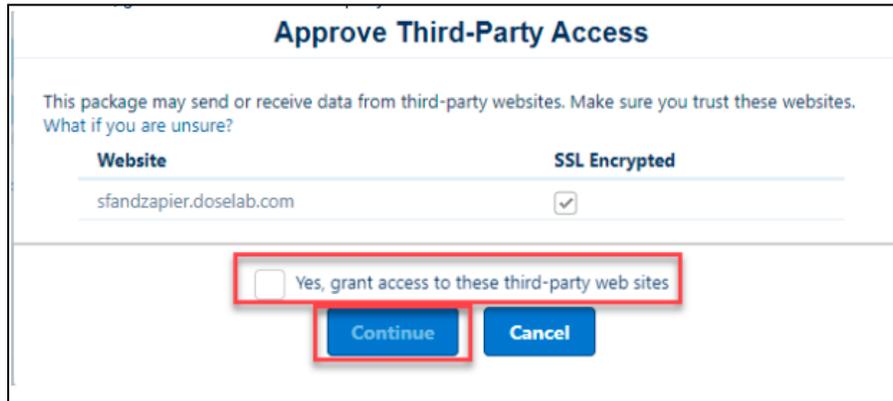
Salesforce application installation

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”:



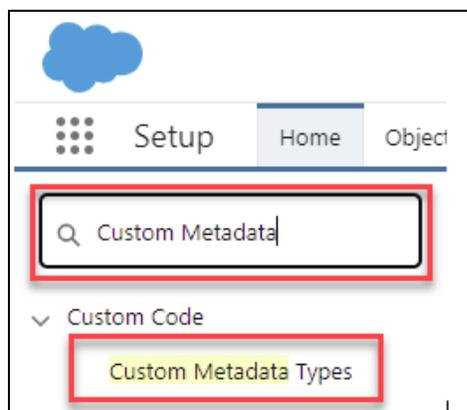
- Wait a few moments until this screen appears, then click Done:



- 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:

All Custom Metadata Types

Custom metadata types enable you to create your own setup objects without building apps from data records in custom objects or custom SOQL limits.

Action	Label	Installed Package
Manage Records	ADM Platform Cache Metadata	Salesforce Agile Accelerator
Del Manage Records	Macorva API	
Del Manage Records	Trailshred Setting	
Manage Records	Work Fields For Record Type	Salesforce Agile Accelerator
Manage Records	Work SLA Response Time	Salesforce Agile Accelerator

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

Macorva API

View: All [Create New View](#)

Action	Label ↑	Macorva API
Edit Del	Default	Default

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

Macorva API

Macorva API Edit Save Save & New Cancel

Information

Label: Default

Macorva API Name: Default ⓘ

Base URL: https://demo.macorva.com

Save Logs:

Username: test@macorva.com

Password: 123456

Save Save & New Cancel

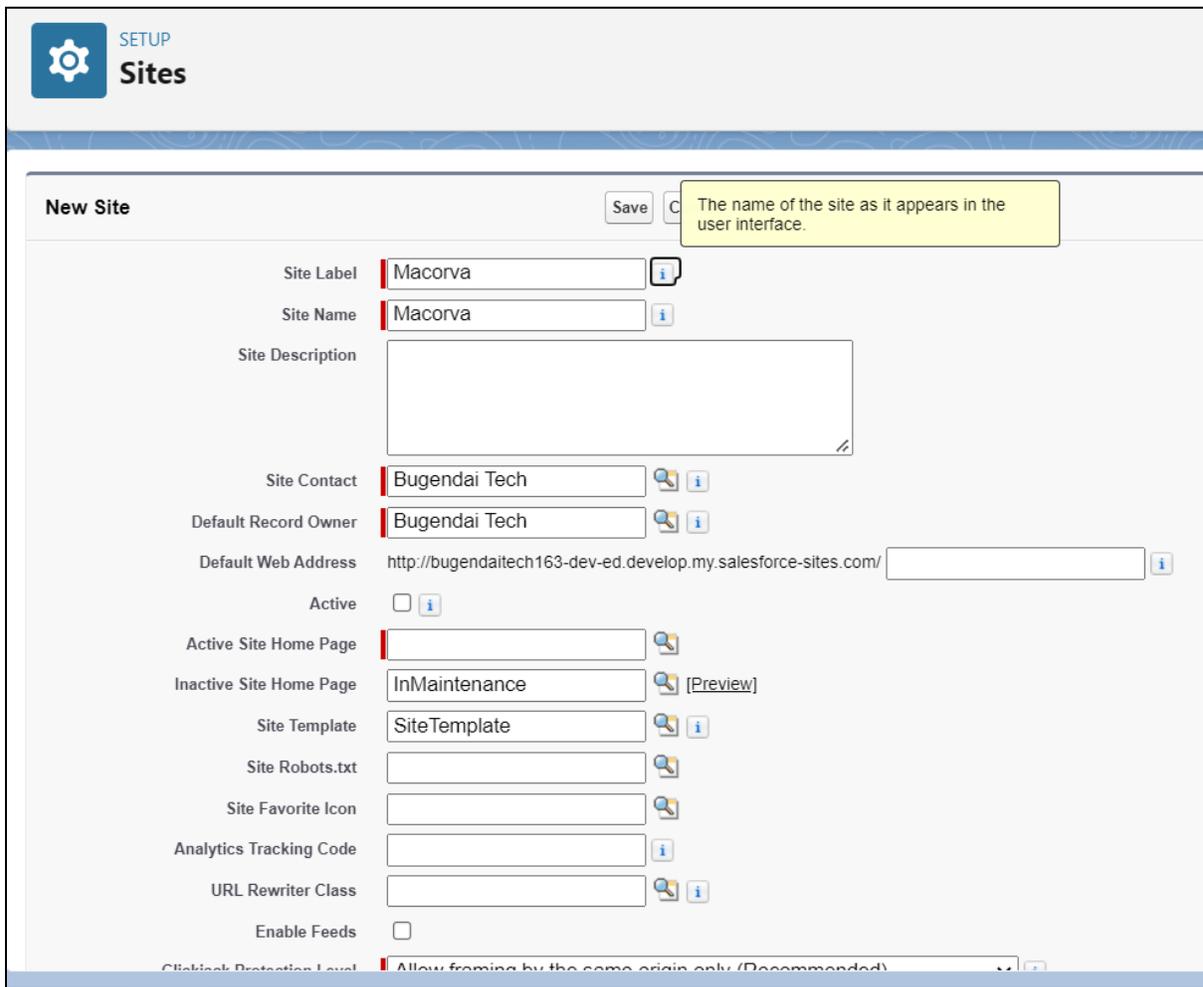


Create a page for webhooks and subscribe to events (15 minutes)

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"



SETUP Sites

New Site Save

The name of the site as it appears in the user interface.

Site Label: Macorva

Site Name: Macorva

Site Description: [Empty]

Site Contact: Bugendai Tech

Default Record Owner: Bugendai Tech

Default Web Address: http://bugendaitech163-dev-ed.develop.my.salesforce-sites.com/

Active:

Active Site Home Page: [Empty]

Inactive Site Home Page: InMaintenance [Preview]

Site Template: SiteTemplate

Site Robots.txt: [Empty]

Site Favorite Icon: [Empty]

Analytics Tracking Code: [Empty]

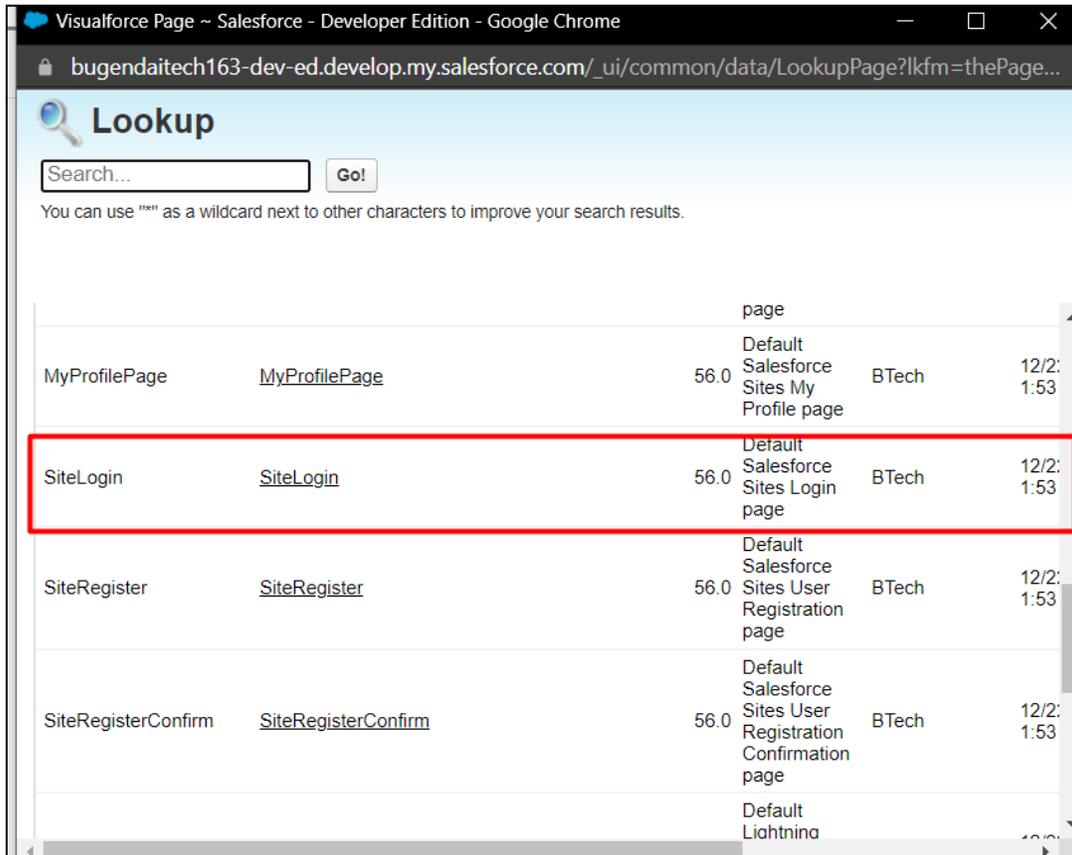
URL Rewriter Class: [Empty]

Enable Feeds:

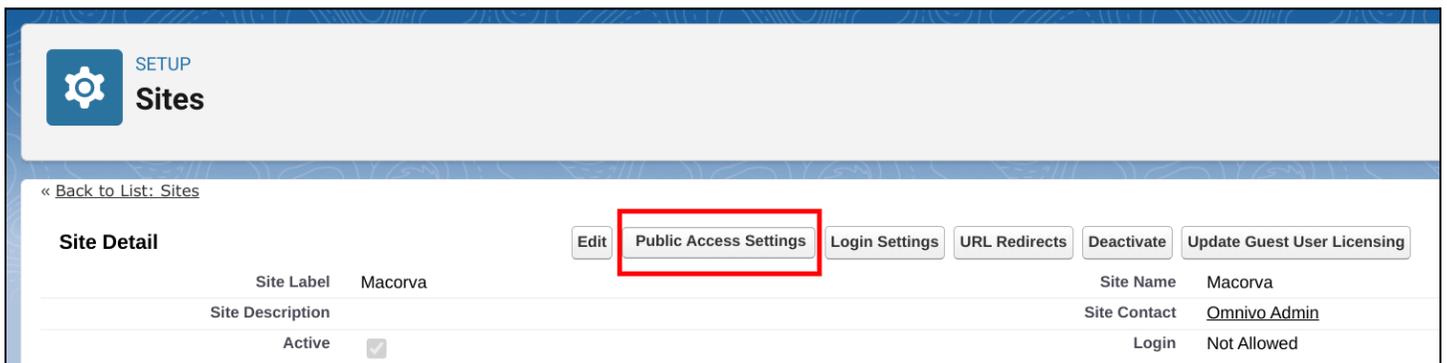
Clickjack Protection Level: Allow framing by the same origin only (Recommended)

- 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”



Require commitment to my password lifetime

Don't immediately expire links in forgot password emails

[Edit](#) [View Users](#)

Login Hours [Edit](#)

No login hours specified

Login IP Ranges [New](#)

No login IP ranges specified. Users from any IP address are allowed to log in.

Enabled Apex Class Access [Edit](#) Enabled Apex

No Apex Classes enabled

Enabled Visualforce Page Access [Edit](#) Enabled Visualfor

Visualforce Page Name	AppExchange Package Name
BandwidthExceeded	
Exception	
FileNotFound	
ForgotPassword	

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

[Save](#) [Cancel](#)

Available Apex Classes

- ChangePasswordController
- ForgotPasswordController
- MacorvaAPI
- MacorvaHelper
- MyProfilePageController
- SendSurveyFlowWrapper
- SiteLoginController
- SiteRegisterController

Enabled Apex Classes

- SurveyWebhook

[Add](#)

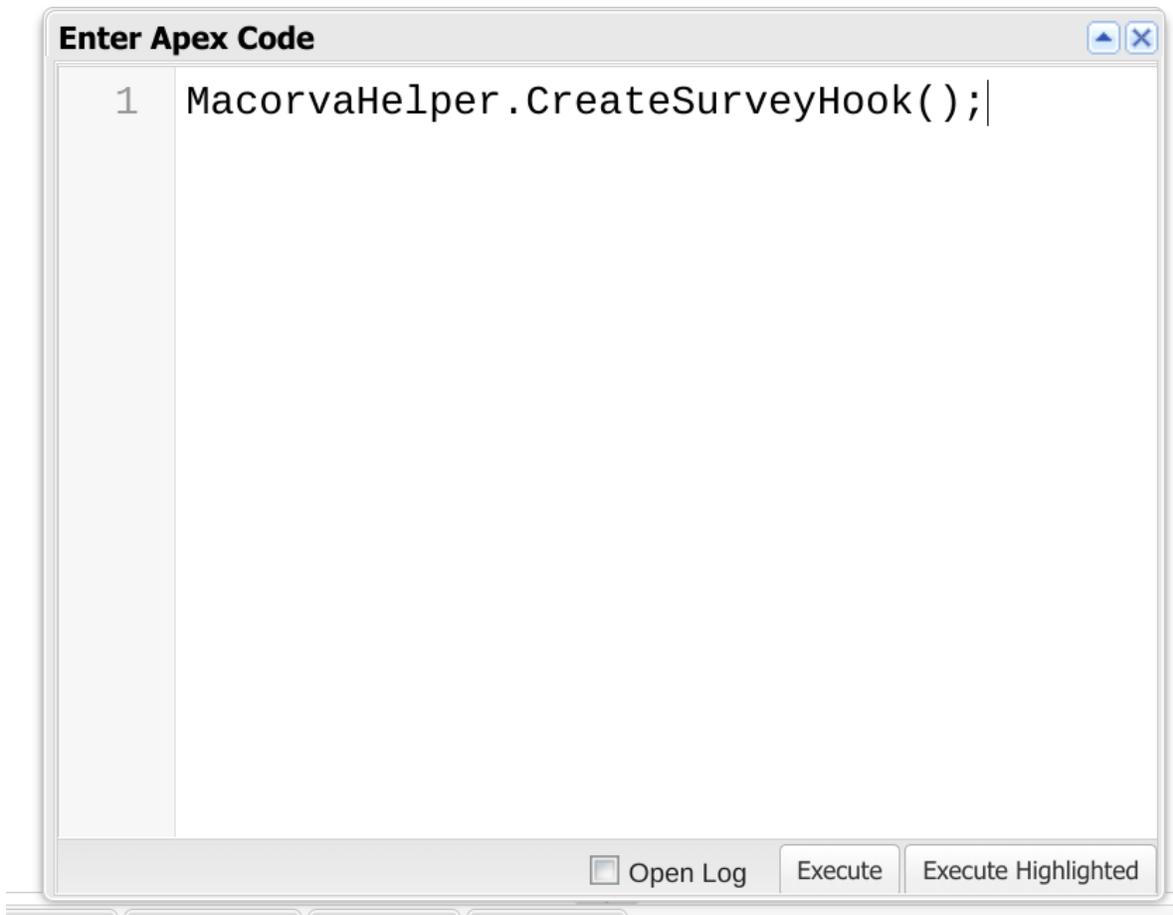
[Remove](#)

- 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.



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.

Related	Details
Survey #	CSAT Rating
S-0000031	3
Survey Id	CSAT Attributes
4867685	Slow, Disorganized
Survey URL	NPS Rating
https://sfandzapier.doselab.com/cx/uQVK1t	6
Status	NPS Attributes
Completed	Slow, Disorganized
Contact	Comments
	Something Nice !
Owner	Employee Reviews
Macorva Admin	Jason Sun (0004)
	3/5, Attentive.
Custom Questions	Notes
I would like my questions to be answered within 1 Week	Case Number: 00001024, Case Priority: Low, Case Status: Closed
I am happy with my email support?	
Agree	
Case	
00001024	
Created By	Last Modified By
Macorva Admin , 12/13/2022, 12:55 AM	Macorva Site Guest User , 12/13/2022, 12:56 AM



- **Macorva Call Logs**

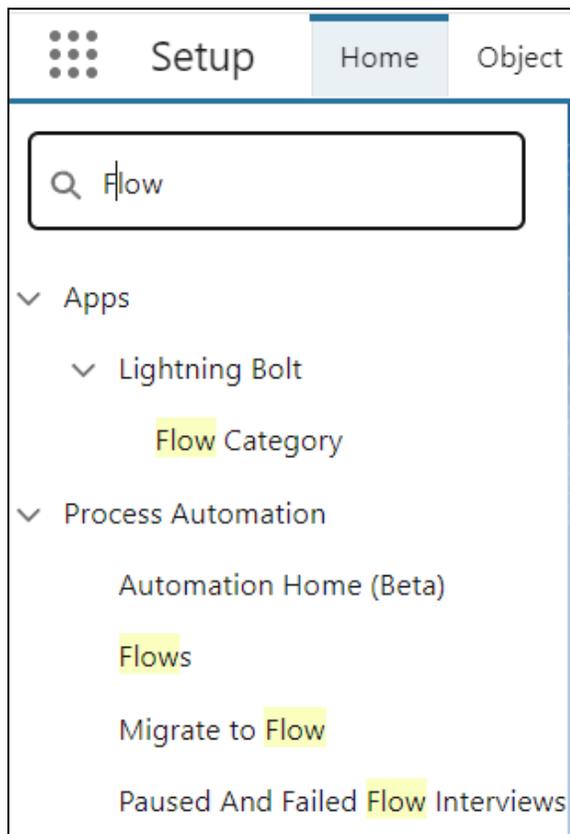
- Macorva Call Logs register all the API logs and the result of each call

Log #	Direction	Success	URL	Method	Respo...	Created Date	
1	0000139	Inbound	<input checked="" type="checkbox"/>	/Webhook	POST	200	12/13/2022, 12:56 AM

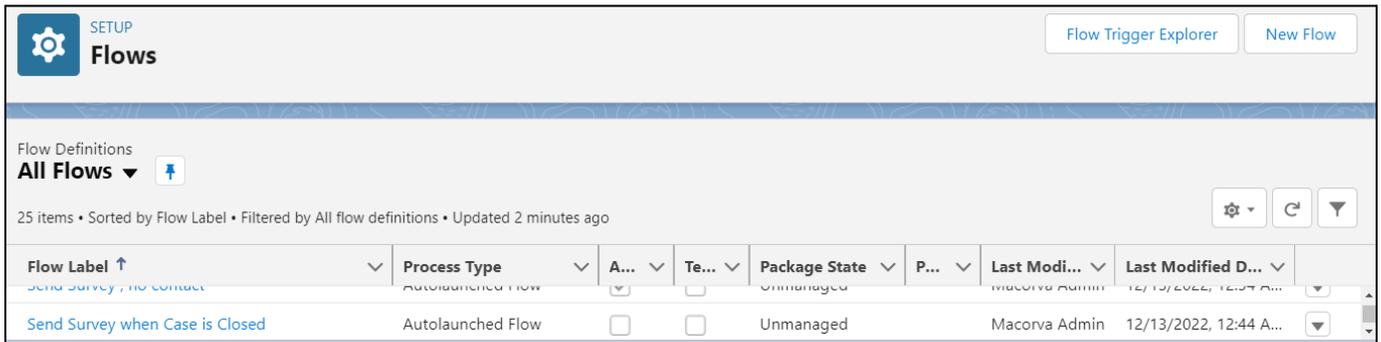
Customizing a Flow to send surveys (30 minutes)

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.

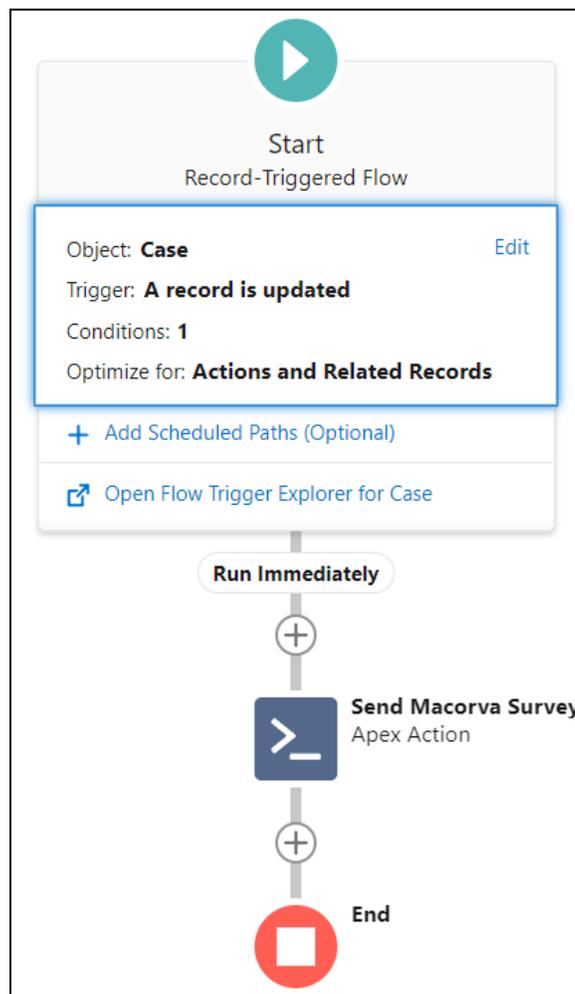
- Go to the Salesforce setup page and type "Flow" in the quick search bar:



- 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:

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Configure Trigger

* Trigger the Flow When:

A record is created

A record is updated

A record is created or updated

A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value	
IsClosed	Equals	True	X

+ Add Condition

When to Run the Flow for Updated Records

Every time a record is updated and meets the condition requirements

Only when a record is updated to meet the condition requirements

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

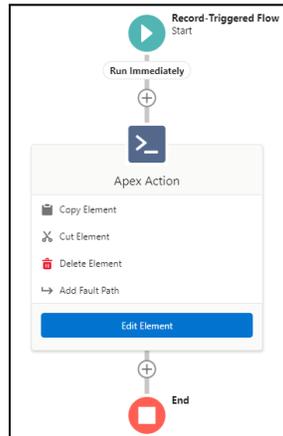
Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Cancel Done

- 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”:



- Now click “Edit Element”:

Edit “Send Macorva Survey” Apex action

Send Macorva Survey (Send_Macorva_Survey)

Set Input Values

A ₃ caseId	<input type="text" value="({\$Record.Id})"/>	<input checked="" type="checkbox"/> Include
A ₃ contactId	<input type="text" value="({\$Record.ContactId})"/>	<input checked="" type="checkbox"/> Include
# delayInMinutes	<input type="text" value="0"/>	<input checked="" type="checkbox"/> Include
A ₃ email	<input type="text" value="({\$Record.ContactEmail})"/>	<input checked="" type="checkbox"/> Include
A ₃ employeeName	<input type="text" value="({\$Record.Owner.UserName})"/>	<input checked="" type="checkbox"/> Include
A ₃ employeeNameID	<input type="text" value="({\$Record.OwnerId})"/>	<input checked="" type="checkbox"/> Include
A ₃ firstName	<input type="text" value="({\$Record.Contact.FirstName})"/>	<input checked="" type="checkbox"/> Include
A ₃ lastName	<input type="text" value="({\$Record.Contact.LastName})"/>	<input checked="" type="checkbox"/> Include
A ₃ notes	<input type="text" value="({\$Record.Notes__c})"/>	<input checked="" type="checkbox"/> Include
A ₃ phone	<input type="text" value="({\$Record.Contact.MobilePhone})"/>	<input checked="" type="checkbox"/> Include
A ₃ productID		<input type="checkbox"/> Don't Include
A ₃ surveyId	<input type="text" value="tl1"/>	<input checked="" type="checkbox"/> Include



- 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:



SETUP > OBJECT MANAGER
Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

Triggers

Flow Triggers

Validation Rules

Edit Case Custom Field
Macorva Notes

Custom Field Definition Edit Save Quick Save Cancel

Field Information

Field Label

Field Name

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

Formula Options

Formula Return Type

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: { Full Name = LastName & ", " & FirstName} [More Examples...](#)

Simple Formula **Advanced Formula**

Select Field Type: Case | Insert Field: -- Insert Merge Field -- | Insert Operator

Macorva Notes (Text) =
'Case Number: '&CaseNumber & ', '& 'Case Priority: '&TEXT(Priority)& ', '& 'Case Status: '&TEXT(Status)

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.

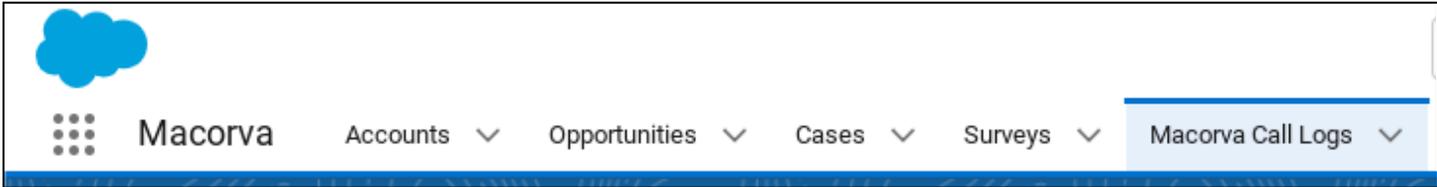
Testing the Macorva application (2 hours)

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)

If surveys are not being automatically sent, or if responses are not being updated in Salesforce, the first step is to 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. You can send screenshots of this to our [support team](#) for fast troubleshooting help.

