# Integrating surveys with CRM

This document discusses how a Closed Case Survey can be integrated with Salesforce. Whilst the document focuses on a Closed Case Survey and a custom Feedback object, the aim of this document is to provide experienced Salesforce users with everything they need to implement their own survey and integration.

The document details the three core steps required to integrate any custom survey with Salesforce:
1. Define information to collect & analyze
2. Link Salesforce object to Clicktools survey
3. Set up deployment

Each step is described in detail with discussions of alternative approaches, examples, screen shots and hints/tips for further development. The document assumes you understand the basic Clicktools functionality (e.g Building a survey, creating an instance etc.).

**The feedback process.**
Before we detail the steps required in customization we will outline the process we will be implementing through this paper. This process can be easily amended to work with other scenarios:

- Automatically issue a survey every 'Nth' closed case but only send a survey if the customer has not given feedback in the last 3 months and has not opted out of the Feedback process.

- Capture feedback in Salesforce.

- Alert Support Management team if response is below a certain level.

- Provide reports and dashboards for KPI and management reporting.

We will begin by detailing how this scenario affects what information we need to collect and analyze.

**1. Define information to collect & analyze**
The first step when integrating surveys with Salesforce Step 1 consists of 2 activities that are wholly dependent upon each other and, as such, they can be completed in any order. The two activities are:
a) Define what, where and how information will be stored in Salesforce
b) Define the survey in Clicktools to collect the information that will be passed in to Salesforce.

**a) Define what, where and how information will be stored in Salesforce.**

There are two fundamental approaches to storing information in Salesforce. One, add new fields to existing objects or two, create a new object.
The best approach to take will depend on a variety of factors, and whilst an in-depth discussion on this topic is beyond the scope of this paper there are some general concepts worth highlighting. In general, the flexibility of Salesforce means there is little to choose between the two approaches.

- **Storage.**
  If you have a heavily customized case/support object you may find you cannot add any more custom fields. Similarly, some editions of Salesforce limit the number of custom objects that can be created and also the way they can be created (e.g. Record Types). Finally, be aware that custom objects use more space than custom fields in standard objects.

- **Reporting.**
  If information is stored in the Case object then general reporting capabilities will

be available to every user (assuming they have access to the Case object and corresponding fields). Adding custom objects will probably require some custom Report Types to be added (for example to enable reports on an Account by Account basis).

- **Visibility.**
  Whilst access to fields and objects can be managed in the standard security model, bear in mind that visibility of feedback can be affected by placement in the page layout. For example, fields added to the object will be more easily viewed on the page layout (perhaps in a dedicated section) whilst new objects are visible on related lists which can easily be lost at the bottom of the screen.

- **Scalability.**
  If you are planning on collecting and storing multiple types of feedback in Salesforce (for example Win/Loss surveys, training surveys) and/or using the same questions across multiple surveys then it is unlikely that custom fields will be sufficient. Instead, you will most likely need to use both custom fields and custom objects or one custom object with multiple record types (if Record Types are available to you).

Whichever approach you choose, the implementation is largely the same. For the purposes of this document we will detail capturing feedback in a dedicated custom object called 'Feedback'. To effectively deploy and report on feedback we will also be outlining minor adjustments to the Contact and Case objects (both of which are optional). Any fundamental differences between approaches will be highlighted.

**Field/Object definition.**
a) Example fields included in a dedicated 'Feedback' Object (alternatively, these can be added to the Case record) for Case win/loss surveys:

| Field | Survey question | Salesforce Field Type |
|---|---|---|
| Speed of response | Q5 option 1 | Numeric (2,0) |
| Knowledge & Expertise | Q5 option 2 | Numeric (2,0) |
| Attitude and professionalism | Q5 option 3 | Numeric (2,0) |
| Recommendation | Q5 option 4 | Numeric (2,0) |
| Repurchase | Q5 option 5 | Numeric (2,0) |
| Overall Satisfaction | Q5 option 6 | Numeric (2,0) |
| Contact Requested | Q6 | Checkbox |
| Comments | Q7 | Long Text |
| Survey Name | N/A | Text to store the name of the Clicktools survey |
| Survey URL | N/A. | URL – a link to see the survey |
| Agent Score | N/A | Formula (percent) to calculate average score from Q5. |
| Agent rating | N/A | Formula (text) based on the score to display chosen graphic. |
| CSI Score | N/A | Average of 3 specific case questions |
| CSI Rating | N/A | Graphical representation of CSI score |
| **Additional Fields if dedicated Custom object** Do not add these fields if you always want feedback to be anonymous. A Parent-Child reference also enables you to add "Roll-up" formula fields on the Parent object. Only one Parent-Child reference is allowed per object. | | |
| Case | N/A | Parent/Child (or Lookup) to link Feedback to Case object |
| Account | N/A | Lookup to link Feedback to Account object |
| Contact | N/A | Lookup to link Feedback to Contact object |
| **b) Optional fields to be added to the Case object:** | | |
| Send Survey | N/A | Formula field used to enable a survey to be sent every 'Nth' closed case: |

| | | |
|---|---|---|
| | | *MOD(VALUE(CaseNumber),'N')* |
| Feeback Requested | Checkbox | Automatically updated by workflow |
| Case Score (when custom object used) | N/A | Roll-up formula field to SUM "Case Score" from custom object. |
| **c) Optional fields to be added to the Contact object: (Required if you wish to provide Contacts with an Opt-out and limit surveys based on responses):** | | |
| Feedback opt-out | N/A | Checkbox |
| Last feedback received | N/A | Date or Date/Time |
| Link to last feedback | URL | Stores link to completed Clicktools survey |
| Last feedback type | Picklist | Records what type of survey was last completed by the Contact |
| Last feedback sent | N/A | Date or Date/Time automatically set by Apex Trigger on Case Close |

**Alternative approaches**

The definition and approach defined here may not match every requirement however, the survey and object described do provide a sound basis for customization and expansion. For example, if you do not wish to use question 1 then remove it from the survey and remove the corresponding field. Similarly, you may prefer to use different question or field types. In terms of different question and field types one common example is the use of a text scale (e.g. Excellent, Good, Average, Poor etc.) rather than a numeric (e.g. 1 to 'X') scale. If you prefer the text scale approach then you can use picklists to store Text based answers and, if required, use Clicktools conditional mapping or Salesforce formula Fields to convert picklist answers to numbers. These formula fields can subsequently be used in scores and ratings although you should be aware of the formula field limits set by Salesforce. Clicktools prefer/recommend numeric fields as they provide more flexibility in reporting and can be used to drive roll-up KPI scores. Two fields that Clicktools is often asked about are Score and Rating fields. These are two formula fields that are used to a) Calculate an overall score for the feedback and b) Display a graphical representation of the Score.

**a) Score**

At the simplest level, score is the average question score. So, for example, if you have three questions each scoring between 1 and 10 then the average will be expressed as: (question_1 + question_2 + question_3)/30.

If you choose a Number formula field the average will be displayed as a number (e.g. 7.86) whilst a Percentage formula field will results in a return of, for example 78.6%.

This approach assumes that all questions are included in the score whether they are answered or not (a blank response is treated as zero). If you wish to omit non-answered questions and present a true mean then you will need to use additional formula fields to count the number of answers received and use this total multiplied by the maximum question score as the denominator in a second formula field.

**b) Rating**

An effective way of communicating feedback scores is to use some form of graphical representation. Common symbols we have seen used include traffic lights, flags, colored bars, stars and smiley faces.

These are presented in Salesforce with a Formula (text) field using an IF statement:

```
IF(Score>0.8,IMAGE("excellentimagelinkhere","Excellent"), IF(Score
>0.7,IMAGE("goodimagelinkhere ","Good"), IF(Score >0.5,IMAGE("averageimagelinkhere
","Average"), IF(Score >0.4,IMAGE("fairimagelinkhere ","Fair"), IF(Clicktools Score
>0,IMAGE("poorimagelinkhere ","Poor"),"N/A")))))
```

Simply, if the Score field is greater than 0.8 (or 80%) then the associated image will be displayed, greater than 0.6 (or 60%) but less than 0.8 and the 'Good' image will be displayed and so on. Depending upon the complexity of your calculation you may have to make a compromise on your images and scores due to available size of Salesforce formula fields.

**b) Define the survey in Clicktools to collect the information that will be passed in to Salesforce.**
The next step in the process is to build the survey to capture the information that will be stored in Salesforce. The principles of the sample survey are as follows:

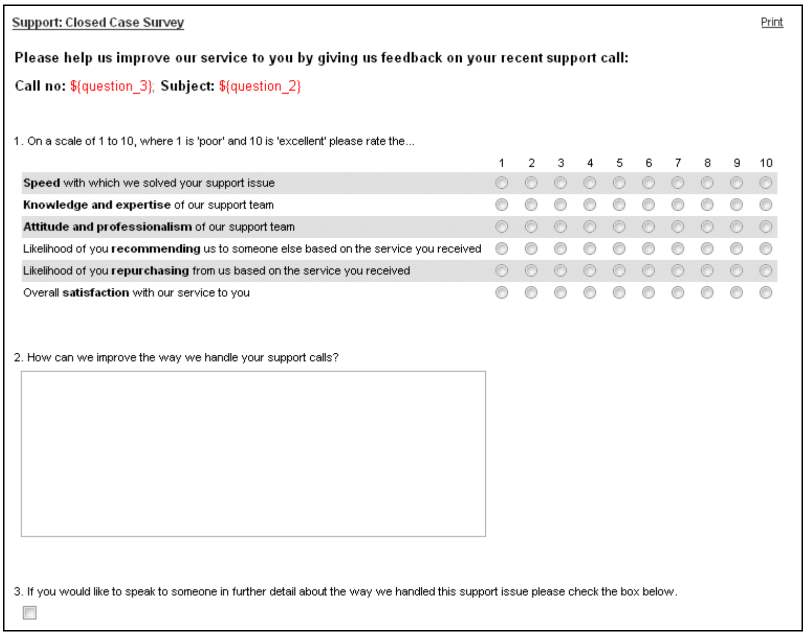
a) Provide personalisation to ensure the customer knows what case you are asking for feedback on and to ensure we link back to the correct information in Salesforce

b) Capture feedback on the specifics of the case resolution

c) Capture feedback on the customer's overall view of the organization

d) Allow the customer to add any comments and request to speak to someone in more detail

We can see the survey in more detail in two screengrabs. The first screengrab shows the survey as the customer would see it without any branding (Clicktools can completely reflect your brand) and the second screengrab shows how the survey is seen through Clicktools builder.



Support: Closed Case Survey | Print

**Please help us improve our service to you by giving us feedback on your recent support call:**

**Call no:** ${question_3}; **Subject:** ${question_2}

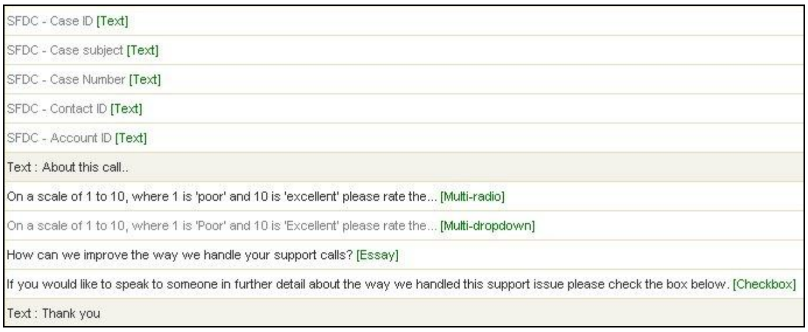
1. On a scale of 1 to 10, where 1 is 'poor' and 10 is 'excellent' please rate the...

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|---|---|---|---|---|---|---|---|---|---|---|
| **Speed** with which we solved your support issue | | | | | | | | | | |
| **Knowledge and expertise** of our support team | | | | | | | | | | |
| **Attitude and professionalism** of our support team | | | | | | | | | | |
| Likelihood of you **recommending** us to someone else based on the service you received | | | | | | | | | | |
| Likelihood of you **repurchasing** from us based on the service you received | | | | | | | | | | |
| Overall **satisfaction** with our service to you | | | | | | | | | | |

2. How can we improve the way we handle your support calls?

3. If you would like to speak to someone in further detail about the way we handled this support issue please check the box below.

Screengrab 1: Survey preview



SFDC - Case ID [Text]
SFDC - Case subject [Text]
SFDC - Case Number [Text]
SFDC - Contact ID [Text]
SFDC - Account ID [Text]
Text : About this call..
On a scale of 1 to 10, where 1 is 'poor' and 10 is 'excellent' please rate the... [Multi-radio]
On a scale of 1 to 10, where 1 is 'Poor' and 10 is 'Excellent' please rate the... [Multi-dropdown]
How can we improve the way we handle your support calls? [Essay]
If you would like to speak to someone in further detail about the way we handled this support issue please check the box below. [Checkbox]
Text : Thank you

Screengrab 2: Survey in Build mode

The first questions in the survey (shown as light grey) are hidden from the user. As they are used to store the related Salesforce information. The Case, Contact and Account IDs are stored to link the feedback results back to a Case, Contact and Account in Salesforce (via lookup relationships in the custom object) whilst the Case Subject and Case Number are displayed in the survey to provide personalization.

There is then some welcoming text that include the ${question_3} and ${question_2} to display the Case number and Subject which is followed by the 3 main questions (the multi-dropdown question is an alternative display method for the multi-radio question). Finally, we have some thank you text.

When completed, the survey answers will be passed in to the chosen Salesforce fields. This is an important point.

**The information passed to the Salesforce field is the QUESTION ANSWER.**

So, in the sample survey, for the matrix question (rate from 1 to 10) the numbers 1 to 10 will be passed in to the Salesforce field.

This is particularly important when passing information in to Salesforce Picklists and Checkboxes.

In terms of Picklists, the options in Clicktools must match the picklist options exactly. If they do not then the Clicktools value will be used and an additional value will have appeared in your picklist (only for the record created/updated – not all new records).
In terms of Checkboxes, they can only be updated with the values True or 1 (checked) or False and 0 (unchecked). Whilst we can use checkbox or radio questions to synch with salesforce we 'hide' the value (True or 1) to pass to Salesforce. Edit the question in the sample survey to see how to do this.

Again, as with the Salesforce definition, this sample survey may not match every requirement so this definition can be amended to match your own. Obviously, the changes made must be consistent with the Salesforce changes.

Clicktools supports 15 question types and, importantly, these enable you to map to every Salesforce field type.

A guide to the mapping of Salesforce fields and the recommended Clicktools question type is shown in the table below:

| Salesforce Field Type | Clicktools question Recommendation | Alternative/Notes |
|---|---|---|
| Auto Number | Not possible | |
| Formula | Not possible | |
| Master-Detail Relationship | Text | A Salesforce ID MUST BE USED to create/update any reference field. |
| Lookup Relationship | Text | A Salesforce ID MUST BE USED to create/update any reference field. |
| Checkbox | Checkbox, Radio/drop, Multi-checkbox | Values must be True and False or 1 and 0 to check (and uncheck) the Salesforce field. Use html to hide the option in Clicktools. |
| Currency | Number, Multi-numeric | |
| Date | Date | You cannot create/update the Date created or modified fields in Salesforce |
| Date/Time | Date | You cannot create/update the Date created or modified fields in Salesforce |
| Email | Text, Multi-text | |
| Number | Number, Multi-numeric | Clicktools passes numbers across with |

| | | |
|---|---|---|
| | Radio/Drop with Numeric choices in the question. | two decimal places. |
| Percent | Percent, Multi-percent | Number |
| Phone | Number | Text, Multi-text |
| Picklist | Radio, Dropdown, Multi-radio, Multi-dropdown | |
| Picklist (Multi-Select) | Checkbox, Multi-checkbox | |
| Text | Text, Multi-text | Any other question type except Essay |
| Text Area | Text, Multi-text | Any other question type except Essay |
| Text Area (Long) | Essay | Any other question type |
| URL | Text, Multi-text | |

Salesforce field to Clicktools question mapping

Once you have your Salesforce definition and Clicktools survey in place, you can now set up the 'Mapping' that links the two together.

**1. Link Salesforce object to Clicktools survey**

The Clicktools 'Map' defines how information in completed surveys will be used to create/update information in Salesforce.

You must have a survey instance to define a mapping. If you do not have a survey instance create one now. (Surveys, Create Instance, set Salesforce to Yes – Automatic and enter your credentials). The mapping concept is outlined below:

1. Choose the object you wish to create/update
2. Select the Action (Create New, Update Existing OR Create or Update)
    a. Select the field to identify the object you will be updating (if Update Existing or Create or Update is selected)
3. In the left hand column, choose the field in Salesforce to create/update*
4. In the right hand column, choose the question in Clicktools to update the field chosen in step 3.
5. Repeat steps 1 to 4 to set up mappings to multiple pieces of information (e.g. 1st to the Case and 2nd to the Contact)
6. Use Conditions against whole or individual elements to control the mapping.

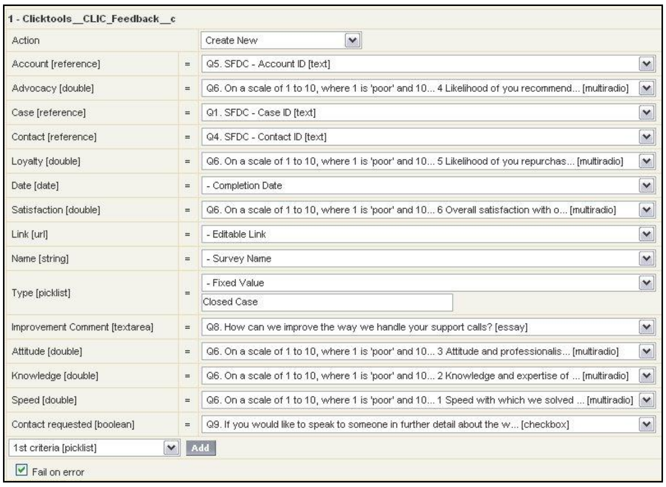
*Note: If you cannot see the fields in the dropdown then logout of Clicktools and log back in. If you still cannot see them then your security settings in Salesforce are not allowing you to see the field. Fields must be visible and create/update. They do not have to be visible on the Page Layout.

[You can see a detailed webinar on setting up mappings at: http://www.clicktools.com/help/webinars/ct4aemappings/player.html]

In this example we want to:
1. Create a custom 'Feedback' object
   Transfer the scores, comments etc. in to the correct fields
   Link the newly created Feedback object to the Case, Contact and Account.

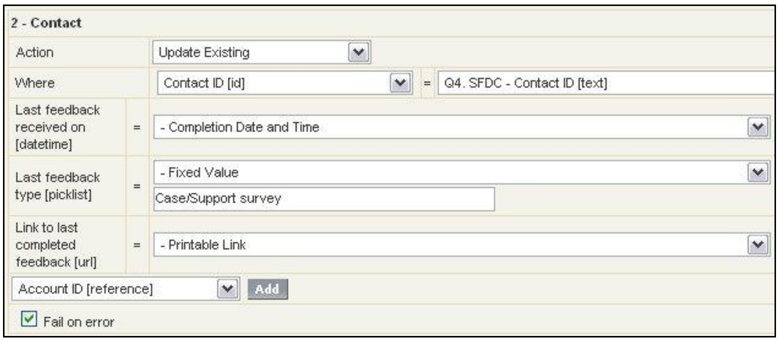
2. Update the Contact object to record when the survey was completed

This is shown in screengrabs 3 and 4.



| 1 - Clicktools__CLIC_Feedback__c | | |
|---|---|---|
| Action | | Create New |
| Account [reference] | = | Q5. SFDC - Account ID [text] |
| Advocacy [double] | = | Q6. On a scale of 1 to 10, where 1 is 'poor' and 10... 4 Likelihood of you recommend... [multiradio] |
| Case [reference] | = | Q1. SFDC - Case ID [text] |
| Contact [reference] | = | Q4. SFDC - Contact ID [text] |
| Loyalty [double] | = | Q6. On a scale of 1 to 10, where 1 is 'poor' and 10... 5 Likelihood of you repurchas... [multiradio] |
| Date [date] | = | - Completion Date |
| Satisfaction [double] | = | Q6. On a scale of 1 to 10, where 1 is 'poor' and 10... 6 Overall satisfaction with o... [multiradio] |
| Link [url] | = | - Editable Link |
| Name [string] | = | - Survey Name |
| Type [picklist] | = | - Fixed Value<br>Closed Case |
| Improvement Comment [textarea] | = | Q8. How can we improve the way we handle your support calls? [essay] |
| Attitude [double] | = | Q6. On a scale of 1 to 10, where 1 is 'poor' and 10... 3 Attitude and professionalis... [multiradio] |
| Knowledge [double] | = | Q6. On a scale of 1 to 10, where 1 is 'poor' and 10... 2 Knowledge and expertise of ... [multiradio] |
| Speed [double] | = | Q6. On a scale of 1 to 10, where 1 is 'poor' and 10... 1 Speed with which we solved ... [multiradio] |
| Contact requested [boolean] | = | Q9. If you would like to speak to someone in further detail about the w... [checkbox] |
| 1st criteria [picklist] | | Add |
| Fail on error | | |

Screengrab 3: Mapping for custom object



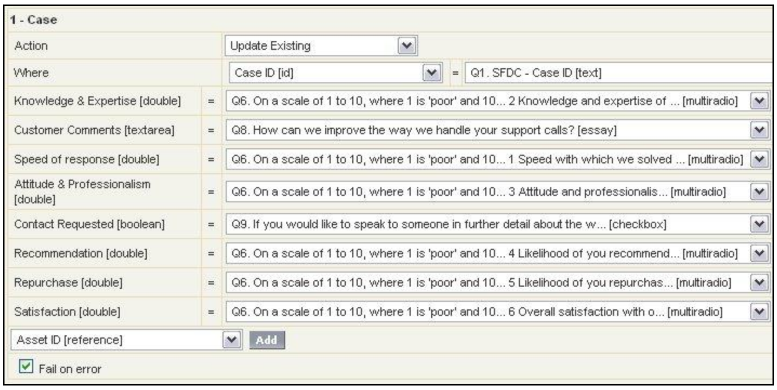
| 2 - Contact | | |
|---|---|---|
| Action | | Update Existing |
| Where | | Contact ID [id] = Q4. SFDC - Contact ID [text] |
| Last feedback received on [datetime] | = | - Completion Date and Time |
| Last feedback type [picklist] | = | - Fixed Value<br>Case/Support survey |
| Link to last completed feedback [url] | = | - Printable Link |
| Account ID [reference] | | Add |
| Fail on error | | |

Screengrab 4: Mapping to record feedback against contact

Note: The Fail on error setting means that, if an error is found, then the mapping will not continue. If this is not selected then the mapping would continue to the next section regardless of whether the first mapping succeeded or not.
In this example, if the synchronization failed to create the Feedback object it would not record the feedback against the contact. This would enable you to fix the error and potentially manually synchronize the response.

### Alternative Approaches

If you have decided to store information against the Case object then your mapping will look like this:



| 1 - Case | | |
|---|---|---|
| Action | | Update Existing |
| Where | | Case ID [id] = Q1. SFDC - Case ID [text] |
| Knowledge & Expertise [double] | = | Q6. On a scale of 1 to 10, where 1 is 'poor' and 10... 2 Knowledge and expertise of ... [multiradio] |
| Customer Comments [textarea] | = | Q8. How can we improve the way we handle your support calls? [essay] |
| Speed of response [double] | = | Q6. On a scale of 1 to 10, where 1 is 'poor' and 10... 1 Speed with which we solved ... [multiradio] |
| Attitude & Professionalism [double] | = | Q6. On a scale of 1 to 10, where 1 is 'poor' and 10... 3 Attitude and professionalis... [multiradio] |
| Contact Requested [boolean] | = | Q9. If you would like to speak to someone in further detail about the w... [checkbox] |
| Recommendation [double] | = | Q6. On a scale of 1 to 10, where 1 is 'poor' and 10... 4 Likelihood of you recommend... [multiradio] |
| Repurchase [double] | = | Q6. On a scale of 1 to 10, where 1 is 'poor' and 10... 5 Likelihood of you repurchas... [multiradio] |
| Satisfaction [double] | = | Q6. On a scale of 1 to 10, where 1 is 'poor' and 10... 6 Overall satisfaction with o... [multiradio] |
| Asset ID [reference] | | Add |
| Fail on error | | |

Screengrab 5: Mapping to custom fields on Case

### 2. Setup deployment

You should now have a customized Salesforce environment, a survey and a mapping that links the two together. The next step in the process is to set up deployment.

With closed case surveys Clicktools recommend the use of workflow to automate sending surveys. Using workflow reduces the amount of time and effort spent administering surveys and enables you to concentrate on improvement. (Workflow also works well for new customer insight surveys, annual satisfaction surveys etc.)

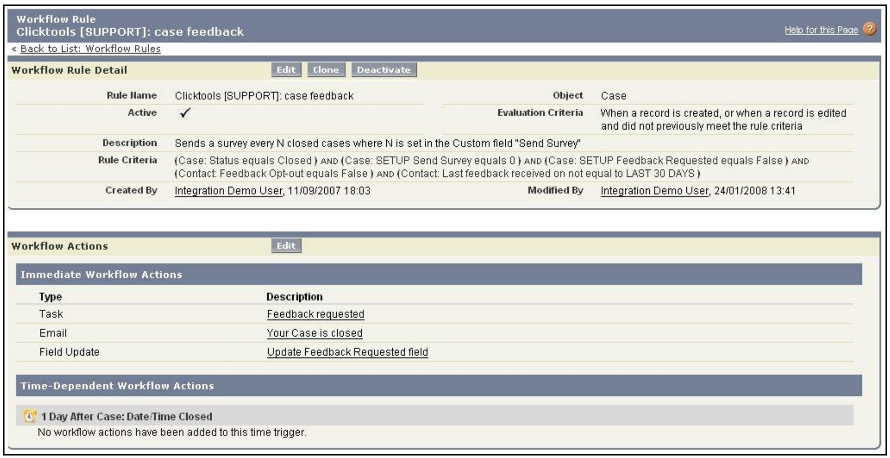
There is tremendous flexibility in Salesforce workflow. For this example, and in the sample workflow rule included with Clicktools extension we will set up workflow as follows:

*"Send a survey every 10th closed case, if the contact has not opted out of the feedback program AND has not given feedback in the last 30 days."*

If these conditions are met then the workflow condition will:

1. Create a task against the Case
2. Send an email to the contact containing a link to the survey
3. Flag the case as having "Feedback requested"

The workflow rule as defined in Salesforce is shown below:


Workflow Rule
Clicktools [SUPPORT]: case feedback
Help for this Page
« Back to List: Workflow Rules

**Workflow Rule Detail** Edit Clone Deactivate

| | | | |
|---|---|---|---|
| Rule Name | Clicktools [SUPPORT]: case feedback | Object | Case |
| Active | ✓ | Evaluation Criteria | When a record is created, or when a record is edited and did not previously meet the rule criteria |
| Description | Sends a survey every N closed cases where N is set in the Custom field "Send Survey" | | |
| Rule Criteria | (Case: Status equals Closed ) AND (Case: SETUP Send Survey equals 0 ) AND (Case: SETUP Feedback Requested equals False ) AND (Contact: Feedback Opt-out equals False ) AND (Contact: Last feedback received on not equal to LAST 30 DAYS ) | | |
| Created By | Integration Demo User, 11/09/2007 18:03 | Modified By | Integration Demo User, 24/01/2008 13:41 |

**Workflow Actions** Edit

**Immediate Workflow Actions**

| Type | Description |
|---|---|
| Task | Feedback requested |
| Email | Your Case is closed |
| Field Update | Update Feedback Requested field |

**Time-Dependent Workflow Actions**

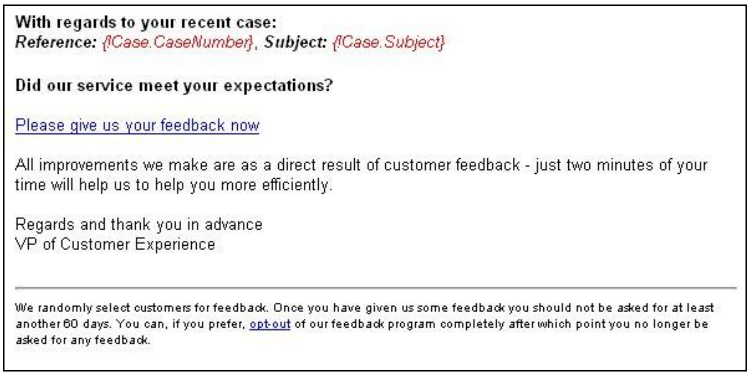
1 Day After Case: Date/Time Closed
No workflow actions have been added to this time trigger.

Screengrab 5: Workflow rule

Again, this rule can be easily amended to satisfy your own requirements. For example, you may only want to capture feedback for certain types of case (e.g. those originated by phone) or for certain product groups.

> Note: The frequency of feedback is primarily governed by the custom field "Send survey". If you want to send a survey every 10th closed case then the formula field should be set to read *MOD(VALUE(CaseNumber),10).* If you want to send every closed case then the formula should read *MOD(VALUE(CaseNumber),1).* Simply change the number to the desired frequency. If the result of the formula is 0, then a survey will be sent.

Obviously, for this workflow rule to work correctly we need a communication (email) template. Clicktools includes sample templates, the case example is displayed.


**With regards to your recent case:**
***Reference:*** {!Case.CaseNumber}, ***Subject:*** {!Case.Subject}

**Did our service meet your expectations?**

Please give us your feedback now

All improvements we make are as a direct result of customer feedback - just two minutes of your time will help us to help you more efficiently.

Regards and thank you in advance
VP of Customer Experience

We randomly select customers for feedback. Once you have given us some feedback you should not be asked for at least another 60 days. You can, if you prefer, opt-out of our feedback program completely after which point you no longer be asked for any feedback.

Screengrab 6: Communication template

There are two important links in this email. The first is an actual link to the survey. Earlier we saw that the survey had hidden questions that enabled us to link the completed survey back to a Case, Account and Contact.

Further, we also wanted to personalize the survey to include the Case number and subject. To achieve both of these aims we use Salesforce merge fields. Merge fields can be used to personalize emails but Clicktools uses them to personalize a survey (ro form etc.)

This done by adding the merge field to the end of the survey link, as seen in the following example:

http://clicktools.com/survey?iv=a010992bd37f340&q1={!Case.Id}&q2={!Case.Subject}&q3={!Case.CaseNumber}&q4={!Contact.Id}&q5={!Account.Id}

The merge fields are preceded by an '&qN=' . This basically tells Clicktools which question in the survey the merge field is answering. In this example, the Case ID is given as the answer to the Q1 in the survey, the case subject to the answer to Q2 in the survey and so on.

**This method can be used to transfer any information from Salesforce in to Clicktools.**
[Detailed webinar at:
http://www.clicktools.com/help/webinars/ct4aeannotatedurl/player.html]

The second link is a link to another survey (included in the Sample Surveys) that enables the contact to opt-out of the feedback program completely.

This link uses the same merge field capability to pass the Contact Id in to a hidden question:

http://clicktools.com/survey?iv=b611329eb33557&q1={!Contact.Id}&q2=1

The &q2=1 simply sets the checkbox question in Clicktools to be checked when the link is clicked. When clicked by the customer displays:

**Please confirm you want to opt-out.**

To confirm you no longer want to receive Clicktools communications, please press the 'Submit' button. To continue to subscribe, please uncheck the box below and then press the 'Submit' button.

**OPTOUT:** If you do **NOT** wish to be kept up to date with news and product information, please check the box below

**Once you Opt-out you will no longer receive any regular promotional emails, newsletters or functionality updates.**

**Press the 'Submit' button to confirm opt-out.**

Submit

Screengrab 7: Opt-out

As with all Clicktools surveys, this can be customized to meet your own requirement. In this example, when the customer clicks the Submit button to confirm their opt-out then the custom Contact field "Feedback Opt-out" is checked.

Subsequent workflow rules check this field and, as a result of it being checked, will not send a survey.

This form could easily be amended to be used for leads or mapped to the standard Email Opt-out checkbox field in Salesforce although we recommend the separation of marketing communication from gathering customer feedback. (Feedback is operational!).
If you want to send surveys on a periodic basis then Clicktools includes a Deploy capability that enables you to use any custom report to send surveys. Simply define the report (any closed cases this month) and use the Deploy wizard as directed. (You can also include the link in other 3rd party email tools).

**Go! Go! Go!**

You now have everything you need to deploy closed case surveys. The checklist below serves as a reminder of the necessary tasks for any survey/form integration between Clicktools and Salesforce:

1. **Build your customization in Salesforce**
   a. Numbers are better for reporting
   b. Use custom formula field for scoring and graphics
2. **Build your survey in Clicktools**
   a. Use hidden questions in the survey to personalize and link back to Salesforce.
   b. Picklists must match exactly
3. **Map survey to Salesforce**
   a. Create/Update multiple pieces of information as required
   b. Use Clicktools special mapping values to pass other information back to Salesforce (such as Printable Link, Completion Date, Survey Name, and Fixed Value).
   c. Use 'Fail on Error' to capture errors and stop or ignore errors and mark everything as synched.
4. **Deploy**
   a. Create your communication template and use merge fields to pass information from Salesforce to Clicktools
   b. Create your workflow rule
   c. Test, test again then activate.

Finally, if you need help refer to the on-line help. If you cannot find what you need please complete the 'Still Need Help' form.