

Crash Course with a Salesforce Developer Account

The Salesforce Integration is available as an add-on. If you are interested in the Salesforce Integration, please [contact us](#) for additional information.

If you would like to test out Salesforce with your SurveyGizmo account, an easy way to do so is with a handy dandy Salesforce Developer account, which allows for one user and is also free of charge.

This article is intended for users wanting to easily test the waters with our integration. It is not intended for users who are familiar with Salesforce or have an existing Salesforce account. Note: We do not support Salesforce. If you have any trouble with the Salesforce side of things you will need to contact their support team!

Creating an Account

To do so, simply head over to <https://developer.salesforce.com/> and hit the Sign Up button up at the top. Fill out the form to create your account.

Once you've confirmed your email address and created a password, you are officially in and greeted with the full majesty of the Salesforce dashboard. Learn it, live it, love it.

Get A Free Developer Environment

Your username should be in the form of an email address, for example: user@domain.com.

I have read and agreed to the [Master Subscription Agreement](#)

Sign me up >

There's a lot of content here on this page, but essentially what we're actually looking at is the Setup screen for your account. If you click on the link at the top right that says Setup at the top, you'll see the exact same thing. There's a lot here that we're not really concerned about for a basic introduction to Salesforce. Let's get right into the stuff that matters.

Salesforce Methodology & Terminology

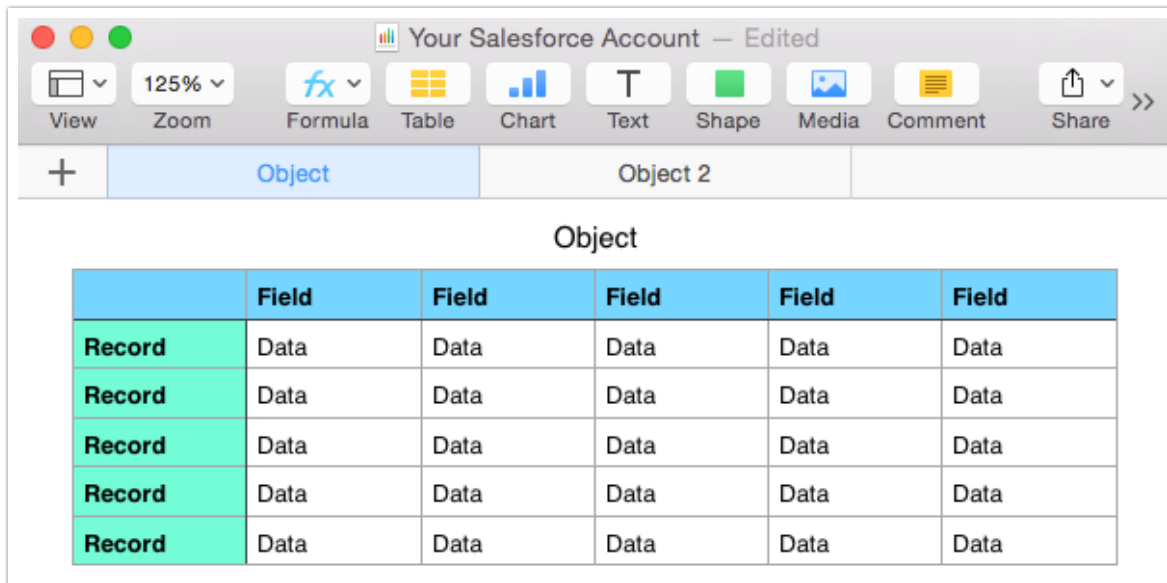
You can think of your data in Salesforce as essentially a database, containing a number of tables (think spreadsheets) which consist of rows and columns. You can think of these with the following vocabulary for Salesforce:

Object: This is the equivalent of the table or spreadsheet. Salesforce has lots of these built in: an *Accounts* object, a *Contacts* object, etc.

Field: This is the equivalent of a column in the table. In the *Contacts* object, you will find fields for contact data such as *Email Address*, *First Name*, *Last Name*, and *Organization*.

Record: This is the equivalent of a row in the table. A contact is really just a record in the *Contacts* object, collecting data associated with each field in the object.

You can visualize this like so

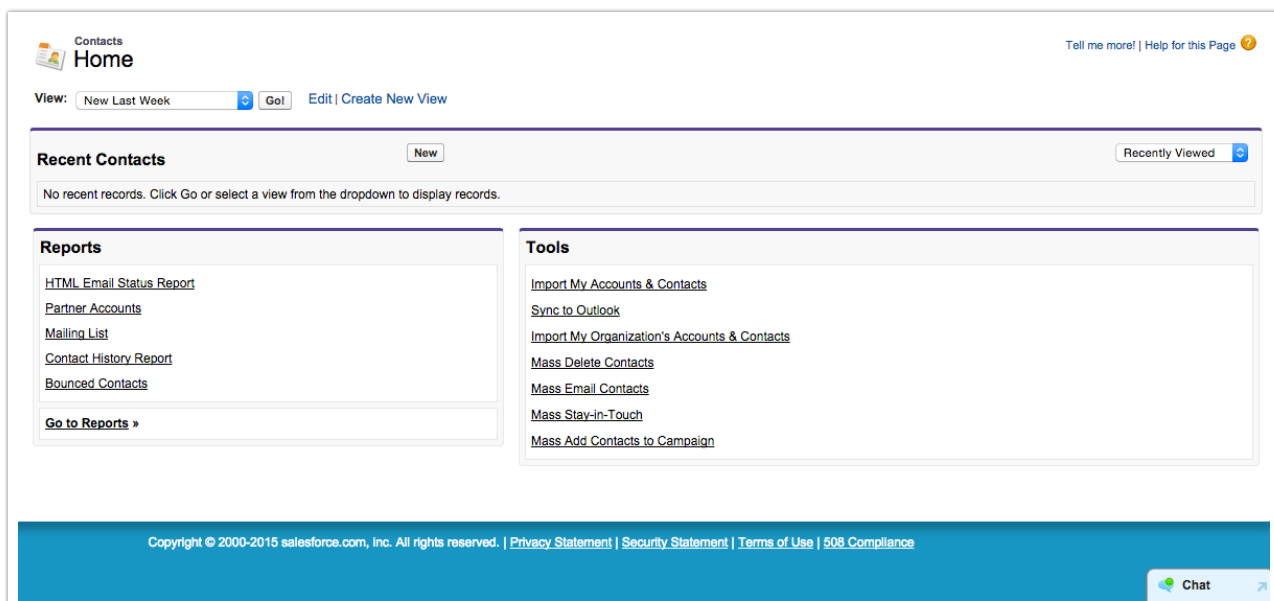


The screenshot shows a Salesforce interface with a table visualization. The top navigation bar includes options for View, Zoom (125%), Formula, Table, Chart, Text, Shape, Media, Comment, and Share. Below the navigation bar, there are two tabs: "Object" (selected) and "Object 2". The main content area displays a table titled "Object".

	Field	Field	Field	Field	Field
Record	Data	Data	Data	Data	Data
Record	Data	Data	Data	Data	Data
Record	Data	Data	Data	Data	Data
Record	Data	Data	Data	Data	Data
Record	Data	Data	Data	Data	Data

Standard Objects

Salesforce has a number of built-in objects complete with pre-configured fields and records. Let's check out the *Contacts* object. At the top of the Setup screen is a navbar for quickly getting to any of your objects (or the ones you need the quickest access to). When you click on "Contacts" you'll be presented with... not much.



The screenshot shows the Salesforce "Contacts Home" page. At the top left, there is a "Contacts Home" header with a "Home" icon. To the right, there is a link "Tell me more! | Help for this Page". Below the header, there is a "View:" dropdown menu set to "New Last Week" and a "Go!" button. To the right of the "Go!" button are links for "Edit" and "Create New View".

The main content area is divided into two columns. The left column is titled "Recent Contacts" and has a "New" button and a "Recently Viewed" dropdown menu. Below this, there is a message: "No recent records. Click Go or select a view from the dropdown to display records." Below the message is a "Reports" section with a list of reports: "HTML Email Status Report", "Partner Accounts", "Mailing List", "Contact History Report", and "Bounced Contacts". At the bottom of the reports section is a "Go to Reports" link.

The right column is titled "Tools" and has a list of tools: "Import My Accounts & Contacts", "Sync to Outlook", "Import My Organization's Accounts & Contacts", "Mass Delete Contacts", "Mass Email Contacts", "Mass Stay-in-Touch", and "Mass Add Contacts to Campaign".

At the bottom of the page, there is a blue footer bar with the text: "Copyright © 2000-2015 salesforce.com, inc. All rights reserved. | [Privacy Statement](#) | [Security Statement](#) | [Terms of Use](#) | [508 Compliance](#)". To the right of the footer bar is a "Chat" button.

You want to go to a *view* so you can see your contacts. In the dropdown next to "View" select "All Contacts" and finally you'll be presented with a table full of contacts you didn't actually create.

The screenshot shows a Salesforce interface for the 'All Contacts' view. At the top, there are buttons for 'Edit', 'Delete', and 'Create New View'. Below the navigation bar is a table with the following columns: Action, Name, Account Name, Title, Phone, Email, and Contact Owner Alias. The table contains 18 rows of contact data. At the bottom of the table, there is a pagination control showing '1-20 of 20' and '0 Selected', and a 'Chat' button.

Action	Name	Account Name	Title	Phone	Email	Contact Owner Alias
<input type="checkbox"/> Edit Del +	Barr, Tim	Grand Hotels & Resorts Ltd	SVP, Administration and Fina...	(312) 596-1000	barr_tim@grandhotels.com	SMcDu
<input type="checkbox"/> Edit Del +	Bond, John	Grand Hotels & Resorts Ltd	VP, Facilities	(312) 596-1000	bond_john@grandhotels.com	SMcDu
<input type="checkbox"/> Edit Del +	Boyle, Lauren	United Oil & Gas Corp.	SVP, Technology	(212) 842-5500	lboyle@uog.com	SMcDu
<input type="checkbox"/> Edit Del +	D'Cruz, Liz	United Oil & Gas, Singapore	VP, Production	(650) 450-8810	ldcruz@uog.com	SMcDu
<input type="checkbox"/> Edit Del +	Davis, Josh	Express Logistics and Transport	Director, Warehouse Mgmt	(503) 421-7800	j.davis@expressl&t.net	SMcDu
<input type="checkbox"/> Edit Del +	Forbes, Sean	Edge Communications	CFO	(512) 757-6000	sean@edge.com	SMcDu
<input type="checkbox"/> Edit Del +	Frank, Edna	GenePoint	VP, Technology	(650) 867-3450	efrank@genepoint.com	SMcDu
<input type="checkbox"/> Edit Del +	Gonzalez, Rose	Edge Communications	SVP, Procurement	(512) 757-6000	rose@edge.com	SMcDu
<input type="checkbox"/> Edit Del +	Green, Avi	United Oil & Gas Corp.	CFO	(212) 842-5500	agreen@uog.com	SMcDu
<input type="checkbox"/> Edit Del +	Grey, Jane	University of Arizona	Dean of Administration	(520) 773-9050	jane_gray@uoa.edu	SMcDu
<input type="checkbox"/> Edit Del +	James, Ashley	United Oil & Gas, UK	VP, Finance	+44 191 4956203	ajames@uog.com	SMcDu
<input type="checkbox"/> Edit Del +	Levy, Barbara	Express Logistics and Transport	SVP, Operations	(503) 421-7800	b.levy@expressl&t.net	SMcDu
<input type="checkbox"/> Edit Del +	Llorac, Jake	sForce				SMcDu
<input type="checkbox"/> Edit Del +	Nedaerk, Siddartha	sForce				SMcDu
<input type="checkbox"/> Edit Del +	Pavlova, Stella	United Oil & Gas Corp.	SVP, Production	(212) 842-5500	spavlova@uog.com	SMcDu
<input type="checkbox"/> Edit Del +	Riplev, Tom	United Oil & Gas, Singapore	Regional General Manager	(650) 450-8810	triplev@uog.com	SMcDu
<input type="checkbox"/> Edit Del +	Rogers, Jack	Burlington Textiles Corp of A...	VP, Facilities	(336) 222-7000	jrogers@burlington.com	SMcDu
<input type="checkbox"/> Edit Del +	Song, Arthur	United Oil & Gas Corp.	CEO	(212) 842-5500	asong@uog.com	SMcDu

Click on any record in this table and you'll see the full contact card, and you can make changes to the individual contact or delete them, etc.

Custom Objects

But of course Salesforce's built-in objects will only get you so far, so let's create our own. Back in Setup (remember that you can always get back to the Setup screen by clicking "Setup" up in the top right). When you're there find "Create" in the navbar on the left and then click "Objects" under that.

The screenshot shows the Salesforce navigation menu on the left and the dashboard on the right. In the navigation menu, the 'Build' section is expanded, and 'Objects' is highlighted with an orange box. An orange arrow points from the 'Objects' box to the 'New custom object' link in the 'Quick Links' section of the dashboard. The dashboard also features a 'Recent Items' table, a 'Community' section with 'Resources', 'Find Answers', and 'Contribute Ideas' options, and a 'Release Resources' link.

You'll see that you have no custom objects to speak of, which makes sense. So go ahead and hit the "New Custom Object" button. We can now create our new object. The required components are marked red. You really only have to worry about the Singular and Plural object names. Hit Save.

You'll now be looking at your new object, including the standard fields that came along with it just by virtue of being created. You'll probably want to create fields for your object, though, so let's do that.

Custom Fields

A custom object won't get you very far without fields to populate, so let's create a new field in our object. Scroll down a bit when looking at your object and under "Fields" hit "New".

Custom Object **Person Who Wants My Gold** Help for this Page ?

[Standard Fields \[4\]](#) |
 [Custom Fields & Relationships \[0\]](#) |
 [Validation Rules \[0\]](#) |
 [Page Layouts \[1\]](#) |
 [Field Sets \[0\]](#) |
 [Compact Layouts \[1\]](#) |
 [Search Layouts \[4\]](#) |
 [Buttons, Links, and Actions \[8\]](#) |
 [Record Types \[0\]](#) |
 [Apex Sharing Reasons \[0\]](#) |
 [Apex Sharing Recalculation \[0\]](#) |
 [Object Limits \[10\]](#)

Custom Object Definition Detail Edit Delete

Singular Label	Person Who Wants My Gold	Description	
Plural Label	People Who Want My Gold	Enable Reports	<input type="checkbox"/>
Object Name	Person_Who_Wants_My_Gold	Track Activities	<input type="checkbox"/>
API Name	Person_Who_Wants_My_Gold__c	Allow in Chatter Groups	<input type="checkbox"/>
		Allow Sharing	<input checked="" type="checkbox"/>
		Allow Bulk API Access	<input checked="" type="checkbox"/>
		Allow Streaming API Access	<input checked="" type="checkbox"/>
		Track Field History	<input type="checkbox"/>
		Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window
Created By	Scrooge McDuck, 7/9/2015 12:06 PM	Modified By	Scrooge McDuck, 7/9/2015 12:07 PM

Standard Fields Standard Fields Help ?

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Owner	Owner	Lookup(User,Queue)		<input checked="" type="checkbox"/>
Edit	People Who Want My Gold Name	Name	Text(80)		<input checked="" type="checkbox"/>

Custom Fields & Relationships New Field Dependencies Custom Fields & Relationships Help ?

No custom fields defined.

Related Lookup Filters

No related lookup filters defined.

Validation Rules New Validation Rules Help ?

No validation rules defined.

[Chat](#)

When you do you'll be presented with several options for the *data type*, which is to say, the kind of data that this field will accept. This is important because if you try to populate the field with data that doesn't fit the model, it won't work. [Click here](#) for a breakdown of the different data types.

Note: In SurveyGizmo trying to push incompatible data can mean a completely broken push action.

Select the datatype that applies to your field. Hit Next.

In step 2 you will have to name your field. Hit Next.

In step 3 you can set security on the field for visibility, but since you will be the only user on this Salesforce account, don't worry about it. Hit Next.

Confirm your field by Saving.

Person Who Wants My Gold
New Custom Field

Step 2. Enter the details

Field Label [i](#)

Please enter the maximum length for a text field below.

Length

Field Name [i](#)

Description

Help Text [i](#)

Required Always require a value in this field in order to save a record

Unique Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)

Treat "ABC" and "abc" as different values (case sensitive)

External ID Set this field as the unique record identifier from an external system

Default Value [Show Formula Editor](#)

Use [formula syntax](#): e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

If you'd like to create more custom fields feel free to do so.

The last thing we want to do with our custom object is add it to our list of tabs at the top that we can use to view the data. From the Setup screen hit Create => Tabs, then New under "Custom Object Tabs". Select the object we just created and then click through the pages to save it.

The screenshot shows the Salesforce 'Custom Tabs' configuration page. On the left is a navigation sidebar with sections for 'Salesforce1 Setup', 'Force.com Home', 'Administer', and 'Build'. The 'Build' section is expanded to show 'Customize' and 'Create', with 'Tabs' highlighted. The main content area is titled 'Custom Tabs' and contains instructions. Below the instructions are four sections: 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Page Tabs'. Each section has a 'New' button and a 'What is This?' link. An orange arrow points to the 'New' button in the 'Custom Object Tabs' section. Below this button is a table with columns for 'Action', 'Label', 'Tab Style', and 'Description'. One row is visible with the label 'People Who Want My Gold' and a 'Safe' tab style.

Integrate with SurveyGizmo

Rather than reinvent the wheel I think it's a better idea to just let you follow the instructions in our excellent article on [setting up a Salesforce integration with SurveyGizmo](#).

Push to Salesforce

Create a survey that will map to your Salesforce object's fields.

Set up a push action to add records. You should see your custom object show up in the list. You can then map your survey questions to the object's fields.

Thank You Page: Thank You! ID: 2

Responses are marked as complete when they reach this page.

🔗 Salesforce Action

Salesforce

You have not set up the Salesforce action yet...

ID: 5
Type: Salesforce

Thank you for taking our survey. Your response is very important.

ID: 1
Type: Text / Instructions

Send an email

AccountHistory
LeadShare
LeadStatus
LoginIp
MailmergeTemplate
Name
Note
NoteAndAttachment
OpenActivity
Opportunity
OpportunityCompetitor
OpportunityContactRole
OpportunityFieldHistory
OpportunityHistory
OpportunityLineItem
OpportunityPartner
OpportunityShare
OpportunityStage
Order
OrderHistory
OrderItem
Organization
Partner
PartnerRole
Period
Person_Who_Wants_My_Gold__c
Pricebook2
Pricebook2History
PricebookEntry
ProcessDefinition
ProcessInstance

PRIMARY SETUP
LOGIC
NEED HELP?

Tip: Check out our [SalesForce.com tutorial!](#)

SalesForce.com object type:

This action will be:

Fire action each time page is hit:

Yes, fire this action each time this page is rendered.

No, only fire this action once for each response.

Fields Mapping:

SurveyGizmo Question	SalesForce Field	Default Value
# 0: Name	Name	✕
# 1: Relationship	Relationship_c	✕

After filling out the survey head back into Salesforce, click on the tab we created earlier for your custom object, and view "All". You should see the record we just created!

Leads Accounts Contacts Opportunities Forecasts Contracts Orders Cases Solutions Products Reports Dashboards People Who Want My Gold

All
Edit | Delete | Create New View
Print

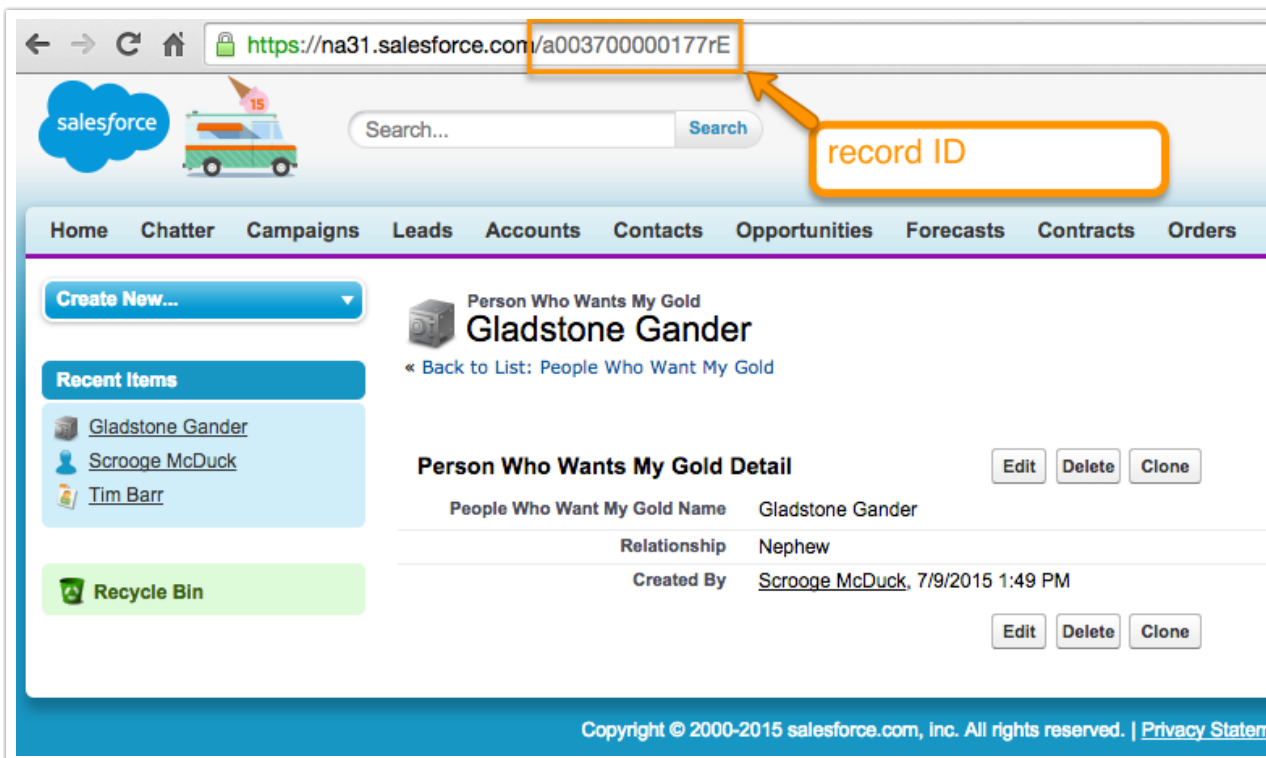
New Person Who Wants My Gold
Change Owner
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other | All

Action People Who Want My Gold Name

Edit | Del Gladstone Gander

Pull from Salesforce

If you'd like to prepopulate your survey with information from Salesforce you can test this out by clicking on our new record, and you can grab the record ID from the URL, here:



Now in SurveyGizmo on the first page of the same survey, add a Salesforce action that populates the survey. Set it up to communicate with the same object. You'll notice this time around that we have a field to set up a *query*. Remember the *lookups* I mentioned before when talking about tables? This is what this query does. When it says

```
select * from Person_Who_Wants_My_Gold__c where Id = '[url("recordid")]'
```

What that really means is we will pull all records from the Person Who Wants My Gold object where the value for the Id field is equal to the value of our URL variable "recordid". Going back to our table, if we pass the record ID we grabbed earlier from the record we just created, you might imagine the table's logic like so

The screenshot shows a Salesforce account interface for 'Scrooge McDuck's Salesforce Account'. The table 'People Who Want My Gold' is displayed with columns A, B, C, and D. The table has 5 rows, with the first row as a header and the following four rows as records. The 'Id' field in the second row is highlighted with an orange box. Below the table, a text field contains the value 'a003700000177rE'.

	A	B	C	D
	Object			
1		Id	Name	Relationship
2	Record	a003700000177rE	Gladstone Gander	Nephew
3	Record	a0037000001784V	Beagle Boys	Thieves
4	Record	a0037000001784a	Donald Duck	Nephew
5	Record	a0037000001784f	Magica Da Spell	Nemesis

Text: a003700000177rE

So we're looking inside the People Who Want My Gold table for the Id field and then finding the one that matches the value we feed it (by way of the URL variable merge code we added in). At that point, Salesforce returns the record with all of its data. We're populating the Name and Relationship into our survey. So when now when we run through the survey with the following link:

<http://www.surveygizmo.com/s3/2229617/People-Who-Want-My-Money-Form?recordid=a003700000177rE>

We should see Gladstone's information prepopulated.

When looking at Populate or Update actions in your SurveyGizmo data you will probably see an 18-character record ID instead of a 15-character ID like what we're using. This is fine, they both point to the same record.

Updating Salesforce Records

If we're prepopulating from an existing record then there's a good chance we want to write the information we collect back to the same record. What we can do is grab our record ID in the survey, and then use that record ID to update the record later (or create

a new record if no record ID is found).

The screenshot shows the 'LOGIC' tab in the SurveyGizmo configuration interface. At the top, there are tabs for 'PRIMARY SETUP' and 'LOGIC', and a 'NEED HELP?' link. The main configuration area is for an action named 'Person_Who_Wants_My_Gold_c(s)'. Below this, it states 'This action will be: Updating records in Salesforce.com'. A section titled 'If you are updating or Pulling information, please modify this query to identify the record(s) you want to access: (You can use Merge Codes)' contains a text box with the following SQL query: `select * from Person Who Wants My_Gold_c where Id = '[question("value"), id="8"]'`. The merge code part of the query is highlighted with an orange box. To the right of the text box is an 'Insert Merge Code' link. Below the query section, there are radio buttons for 'Fire action each time page is hit:'. The first option is 'Yes, fire this action each time this page is rendered.' and the second, selected option is 'No, only fire this action once for each response.'. Underneath is a 'Fields Mapping' section with a table:

SurveyGizmo Question	SalesForce Field	Default Value
Name	Name	x
Relationship	Relationship_c	x

Below the table are three dropdown menus: '-- Select Question --', '-- Select Field --', and an empty text box, followed by an 'Add' button. At the bottom right, there are 'Cancel' and 'Save Action' buttons.

On the first page of our survey let's create a [Hidden Value action](#) and prepopulate it with the same merge code we used earlier, `[url("recordid")]`.

Now on the last page, we need to add a new Salesforce action, this time, to "Update existing records". We'll be setting this one up with a lookup like we did with the Prepopulate action. This time, though we will use a merge code for the hidden value.

We also need to set up our Update and Add actions with logic so that both don't run at the same time. Easy peasy! We'll just set up our new update action so that it runs when the hidden value storing the record id *is answered*. If there's no record ID it won't run.

Conversely, we will set up the Add action to run when the hidden value *is not answered*. That should do it.

Logic Rule

Only show this question based on answers to previous questions or other logic conditions

Remove All Logic

record id	is answered
-----------	-------------

+ Add Condition

Hide all subsequent questions on this page

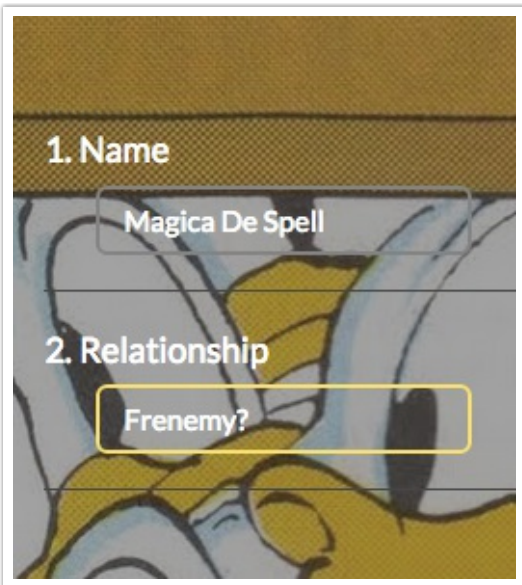
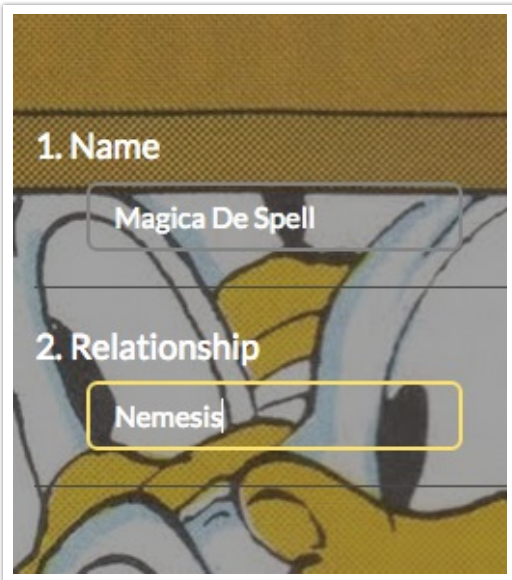
Hide this question by default (mainly used with custom scripting)

Disable Question

Yes

No

Now if we use a link that passes in one of our record IDs we can update the same record with new information. Let's try <http://www.surveygizmo.com/s3/2229617/People-Who-Want-My-Money-Form?recordid=a0037000001784f>. It should prepopulate the survey with Magica's information. When we change her relationship and submit the survey, we'll see the updated information in Salesforce right away.



Let's check back in with Salesforce to see what happened. Go back to the object's tab in Salesforce and head to the "All" view. I've customized the view (using the Edit button above the table) to show us some more information than would be here by default. But there we go! Magica's been updated.

Leads Accounts Contacts Opportunities Forecasts Contracts Orders Cases Solutions Products Reports Dashboards People Who Want My Gold			
All Edit Delete Create New View			
New Person Who Wants My Gold		Change Owner	
Action	Record ID ↑	Name	Relationship
<input type="checkbox"/> Edit Del	a003700000177rE	Gladstone Gander	Nephew
<input type="checkbox"/> Edit Del	a0037000001784V	Beagle Boys	Thieves
<input type="checkbox"/> Edit Del	a0037000001784a	Donald Duck	Nephew
<input type="checkbox"/> Edit Del	a0037000001784f	Magica De Spell	Frenemy?

Conclusion

And that's it, you're now up and running with Salesforce. This only touches the surface of what you can do with Salesforce of course, but you can hopefully take this and run with it for your own needs. Have fun and happy surveying!

Related Articles