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.

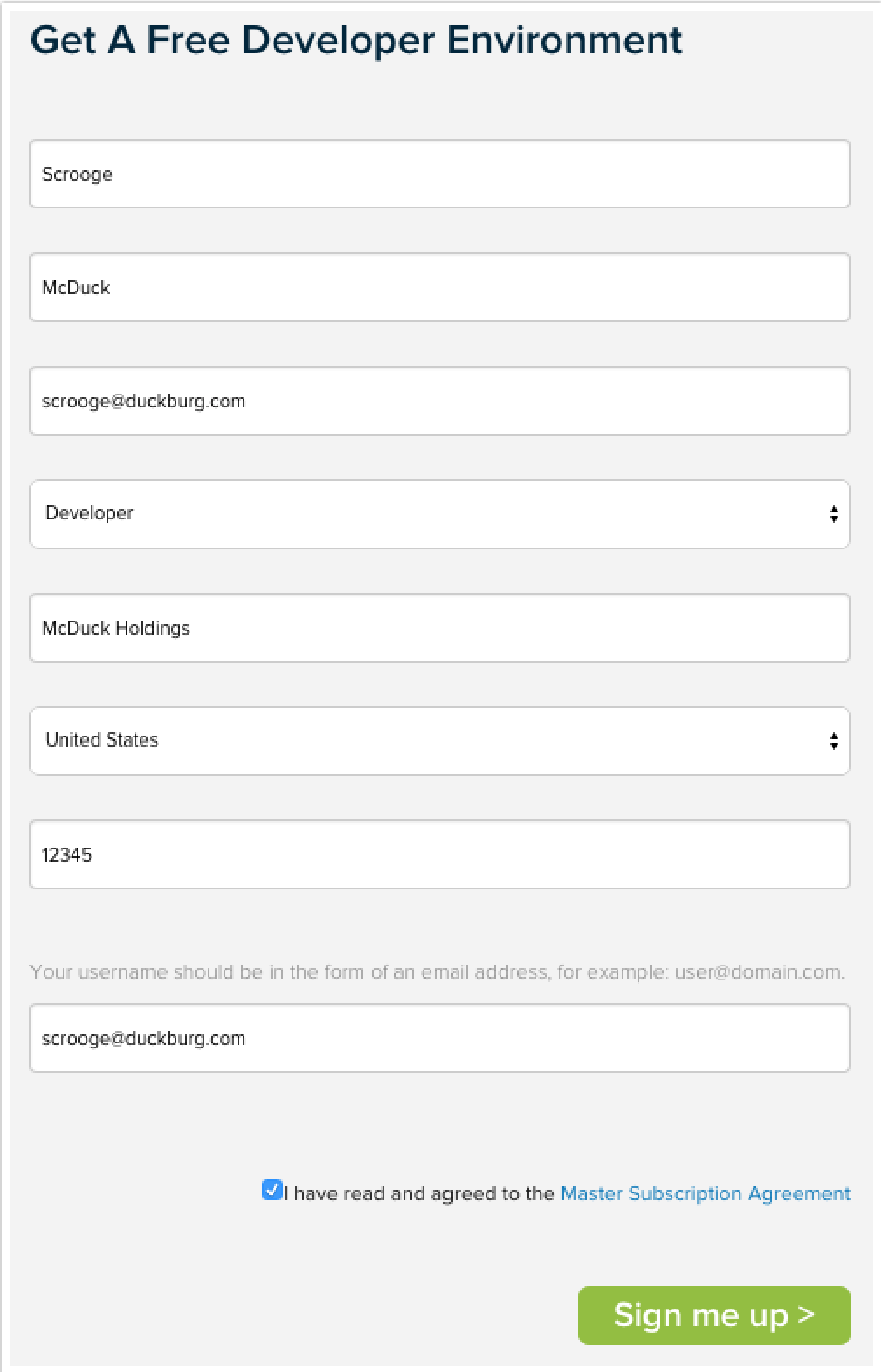
If you would like to test out Salesforce with your SurveyGizmo account, an easy way to do so is with a handy dandy Salesforce Developer account, which allows for one user and is also free of charge.

> 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

Scrooge

McDuck

scrooge@duckburg.com

Developer

McDuck Holdings

United States

12345

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

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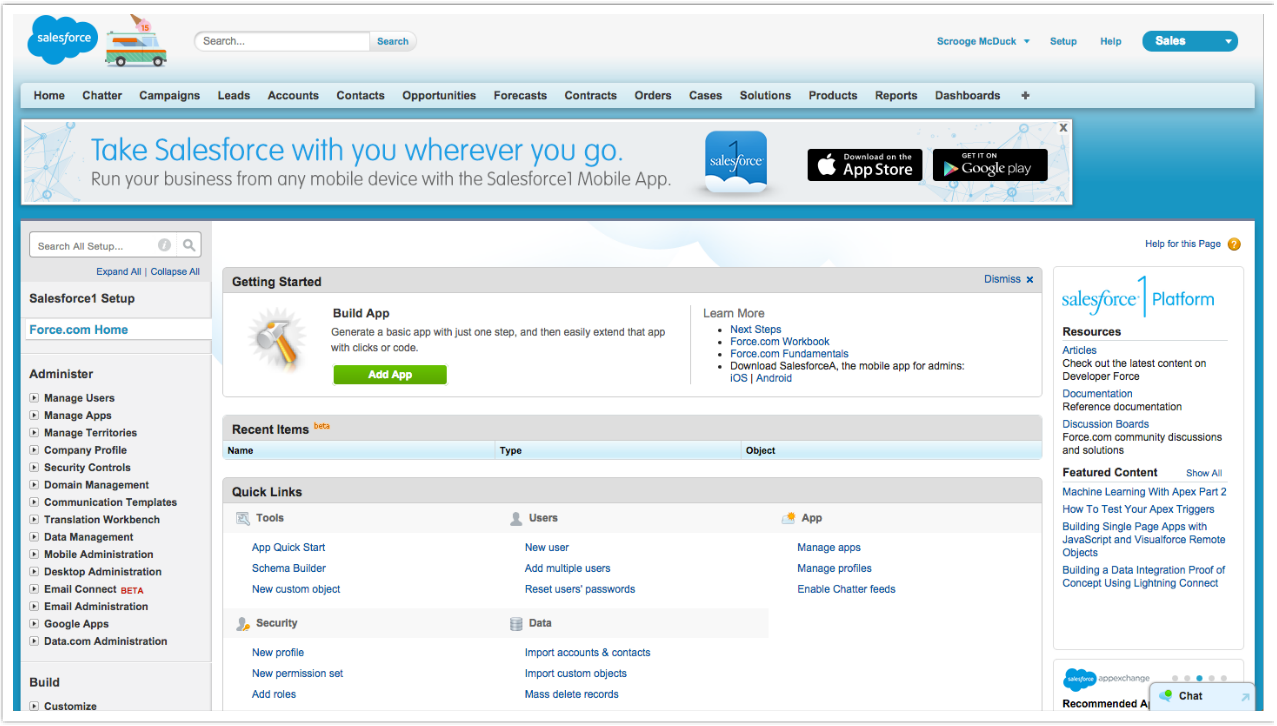


There's a lot of content here on this page, but essentially what we're actually looking at is the Setup screen for your account. If you click on the link at the top right that says Setup at the top, you'll see the exact same thing. There's a lot here that we're not really concerned about for a basic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

Salesforce Methodology & Terminology

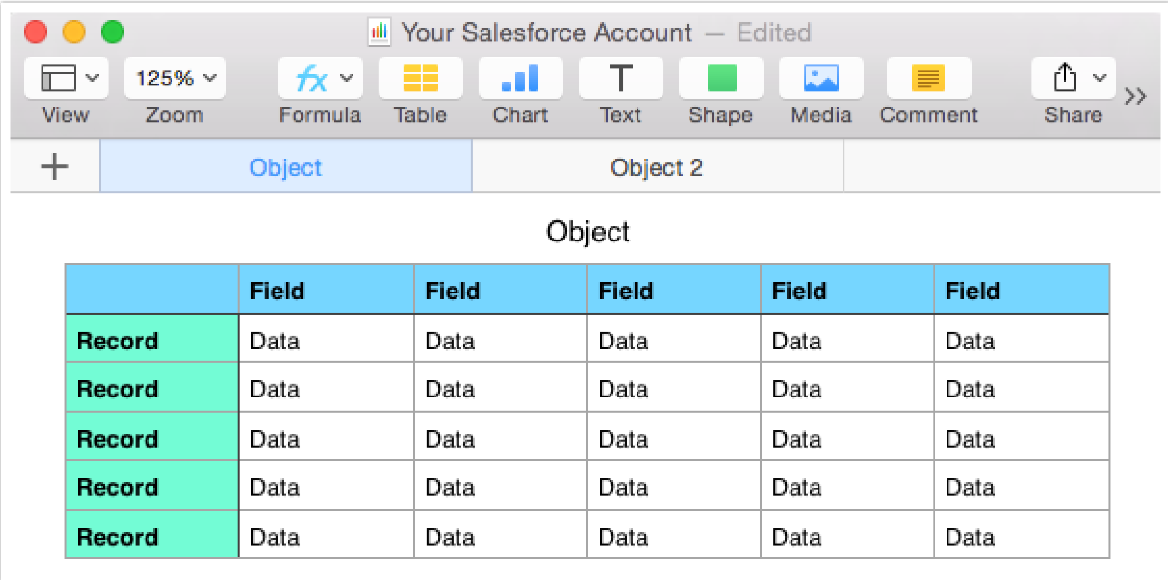
You can think of your data in Salesforce as essentially a database, containing a number of tables (think spreadsheets) which consist of rows and columns. You can think of these with the following vocabulary for Salesforce:

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*.

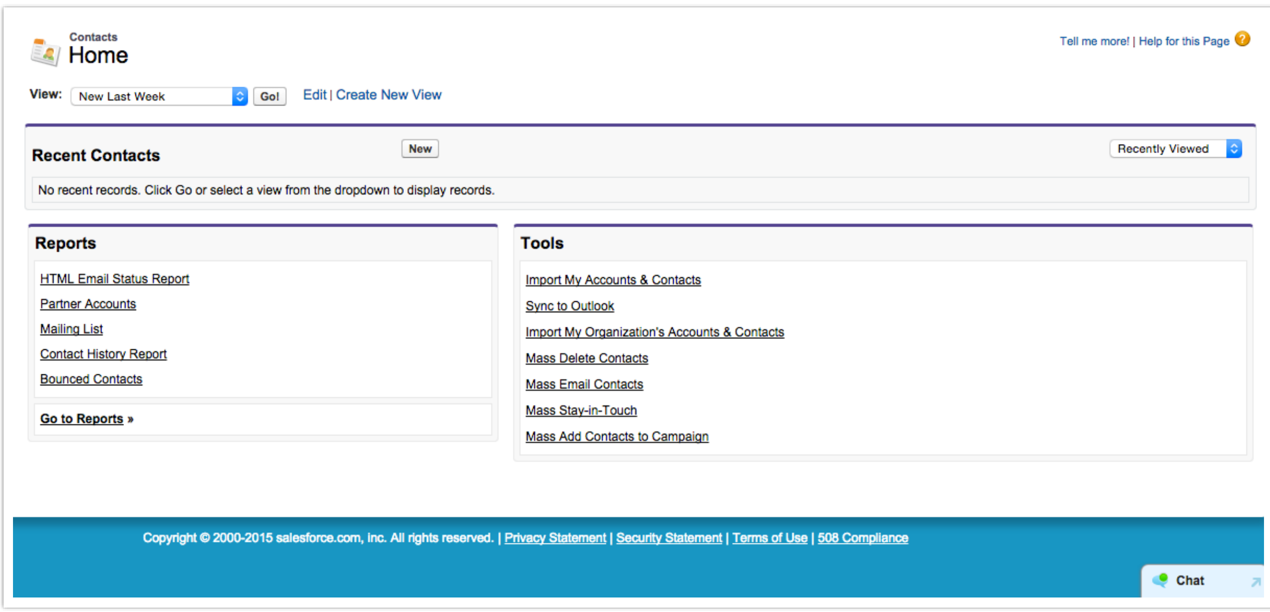
Record: This is the equivalent of a row in the table. A contact is really just a record in the *Contacts* object, collecting data associated with each field in the object.

You can visualize this like so

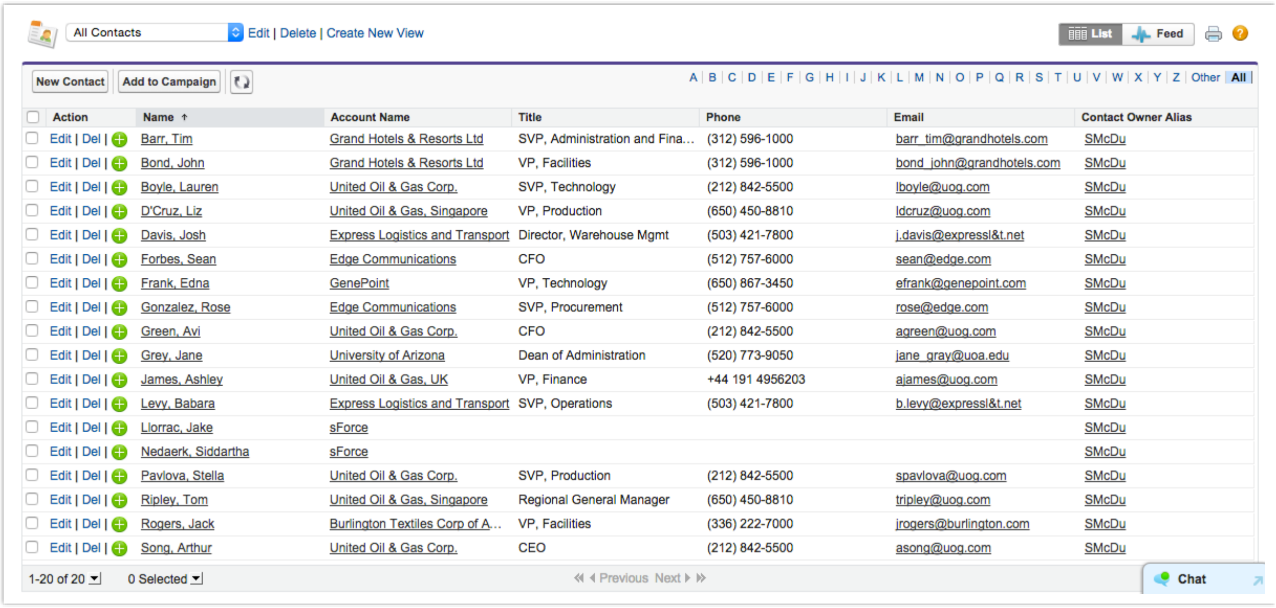


Standard Objects

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.



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.

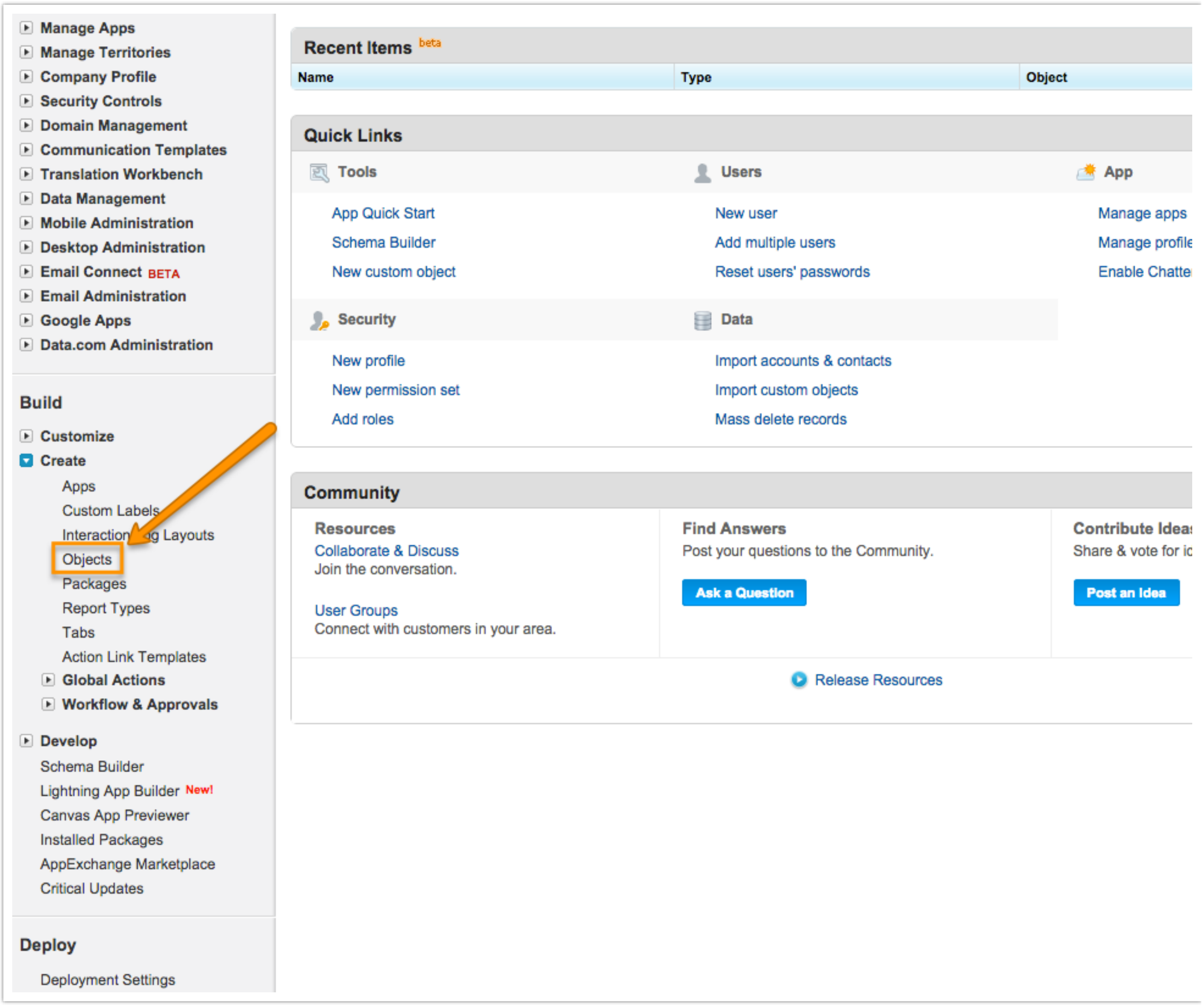


Action	Name ↑	Account Name	Title	Phone	Email	Contact Owner Alias
Edit | Del |	Barr, Tim	Grand Hotels & Resorts Ltd	SVP, Administration and Fina...	(312) 596-1000	barr_tim@grandhotels.com	SMcDu
Edit | Del |	Bond, John	Grand Hotels & Resorts Ltd	VP, Facilities	(312) 596-1000	bond_john@grandhotels.com	SMcDu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

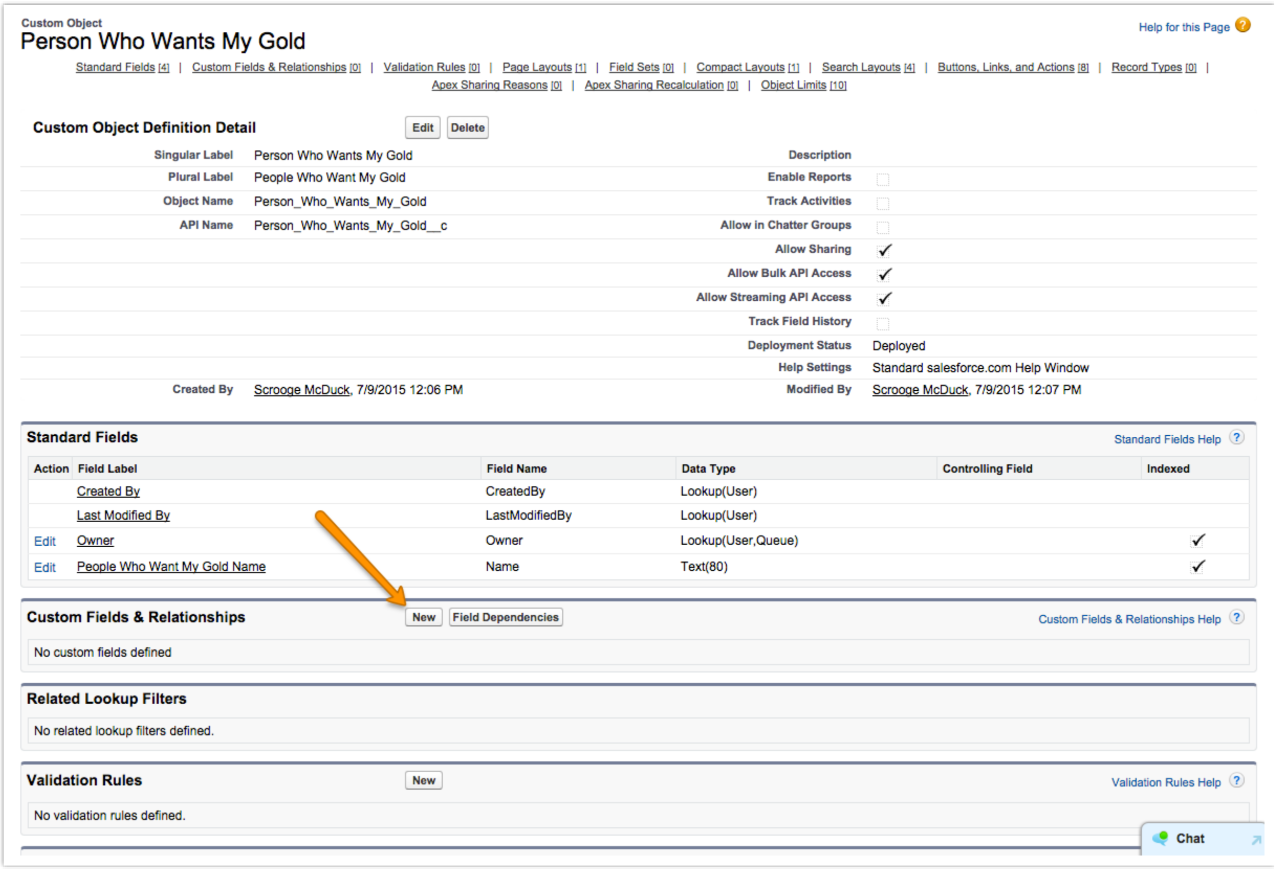


You'll see that you have no custom objects to speak of, which makes sense. So go ahead and hit the "New Custom Object" button. We can now create our new object. The required components are marked red. You really only have to worry about the Singular and Plural object names. Hit Save.

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".



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.

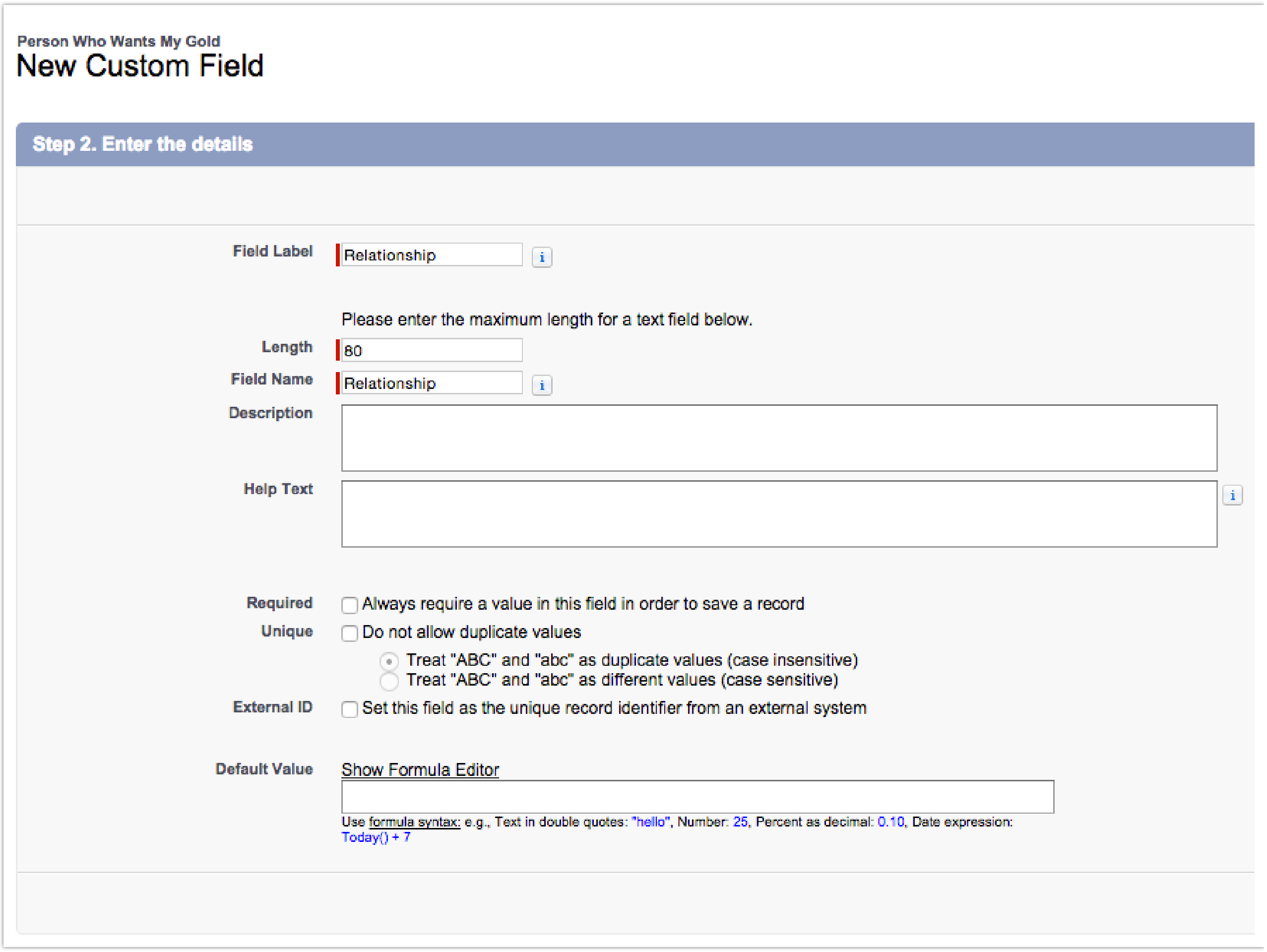
> Note: In SurveyGizmo trying to push incompatible data can mean a completely broken push action.

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

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

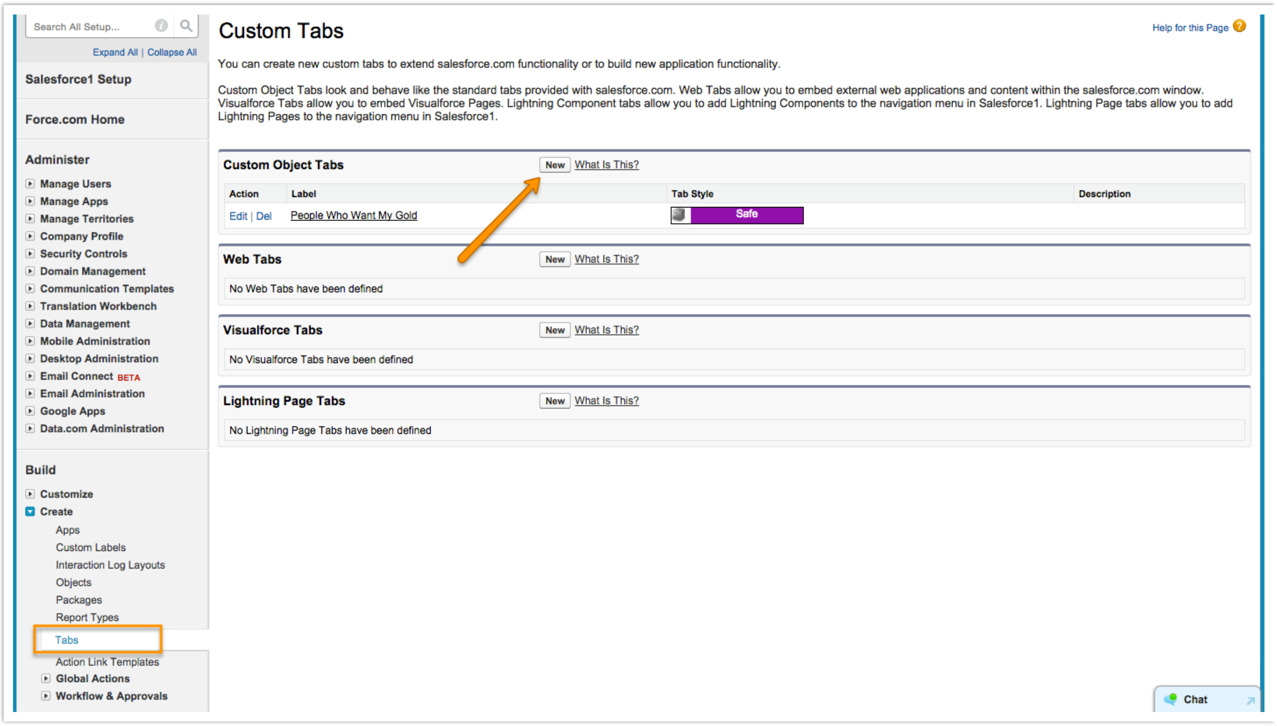
In step 3 you can set security on the field for visibility, but since you will be the only user on this Salesforce account, don't worry about it. Hit Next.

Confirm your field by Saving.



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.



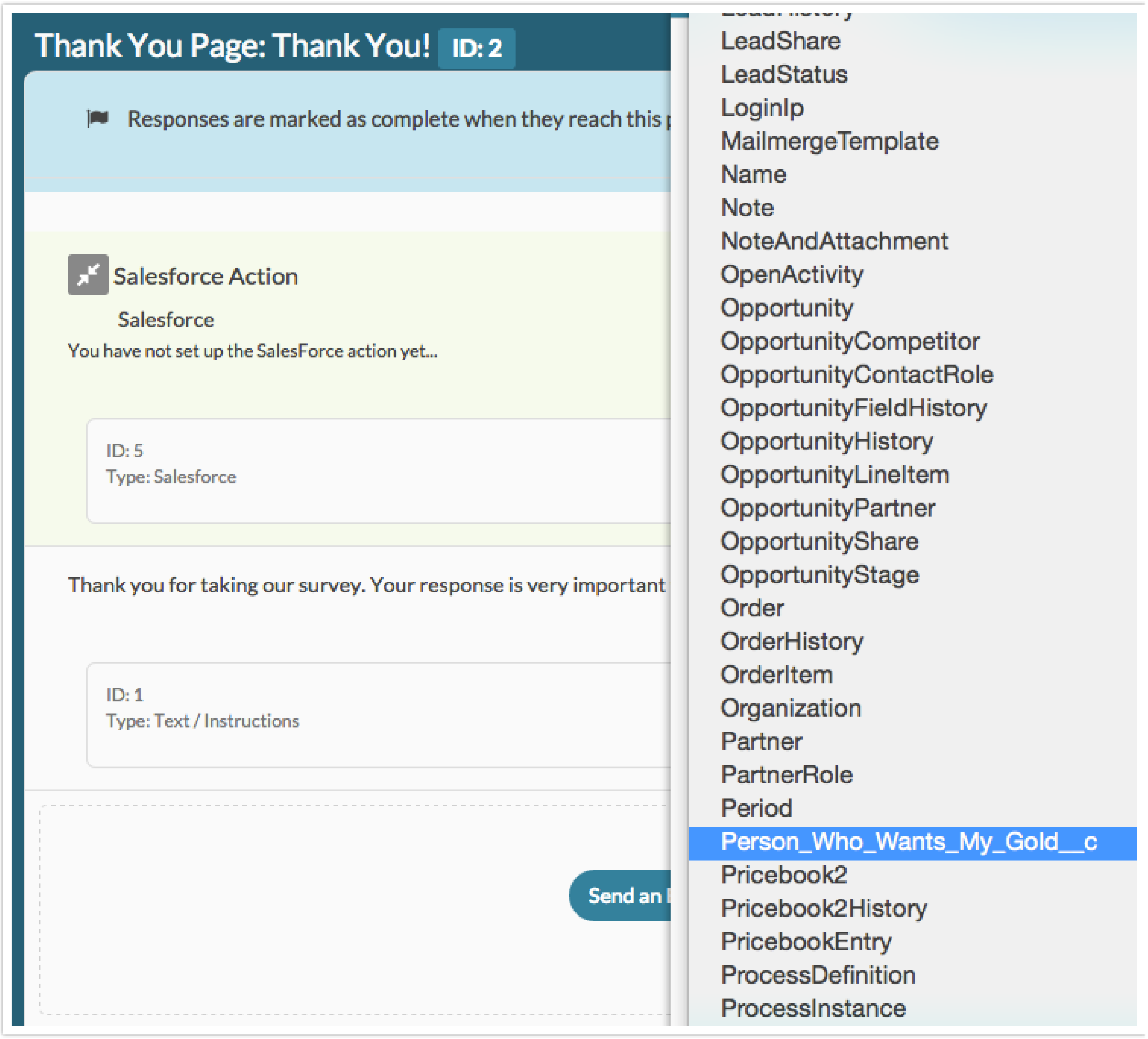
Integrate with SurveyGizmo

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
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
LeadShare
LeadStatus
LoginIp
MailmergeTemplate
Name
Note
NoteAndAttachment
OpenActivity
Opportunity
OpportunityCompetitor
OpportunityContactRole
OpportunityFieldHistory
OpportunityHistory
OpportunityLineItem
OpportunityPartner
OpportunityShare
OpportunityStage
Order
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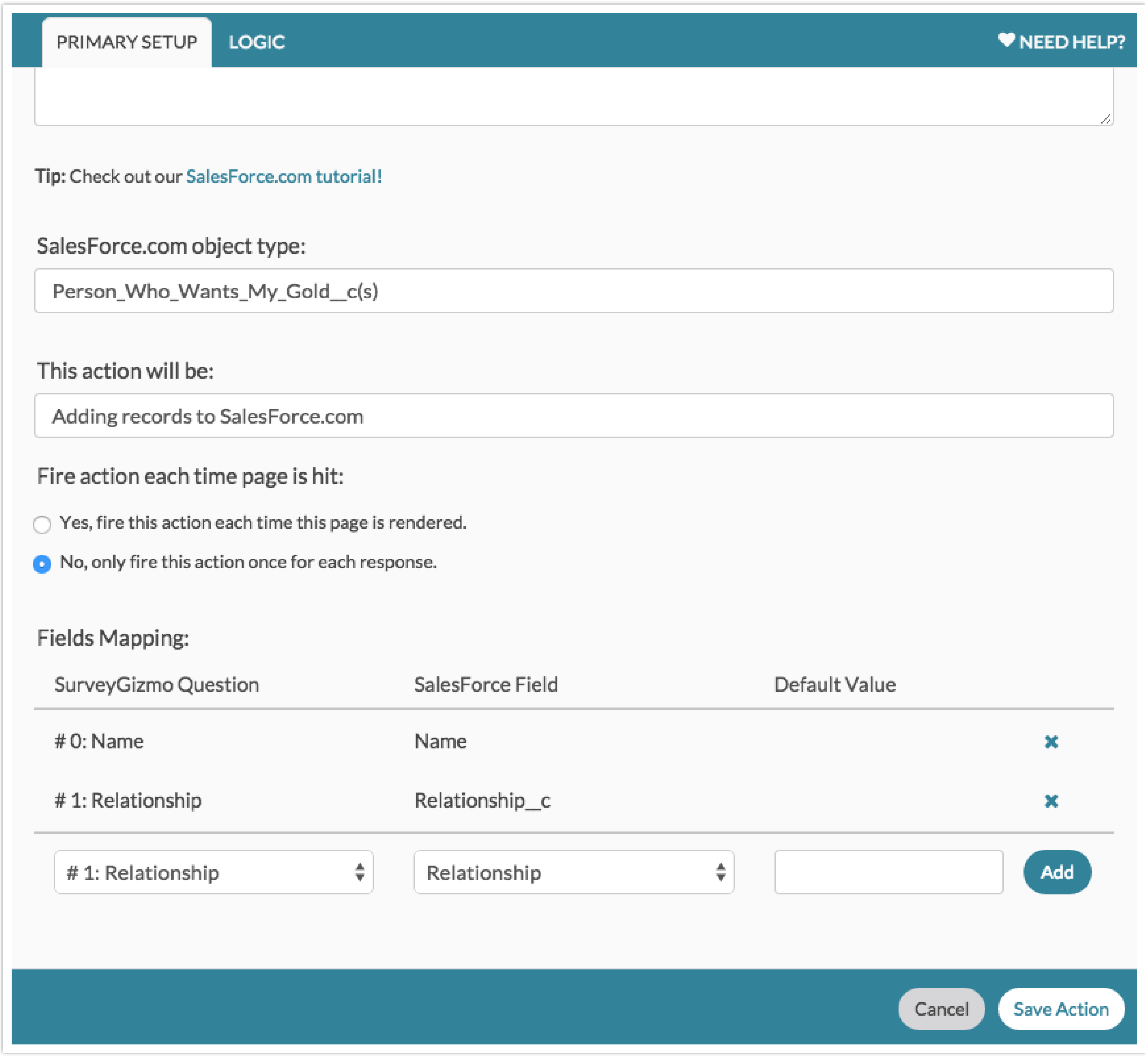
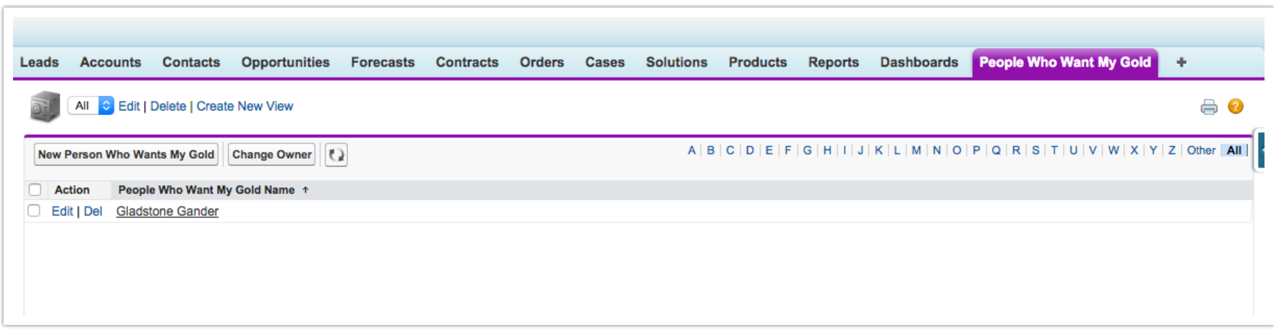
PricebookEntry
ProcessDefinition
ProcessInstance

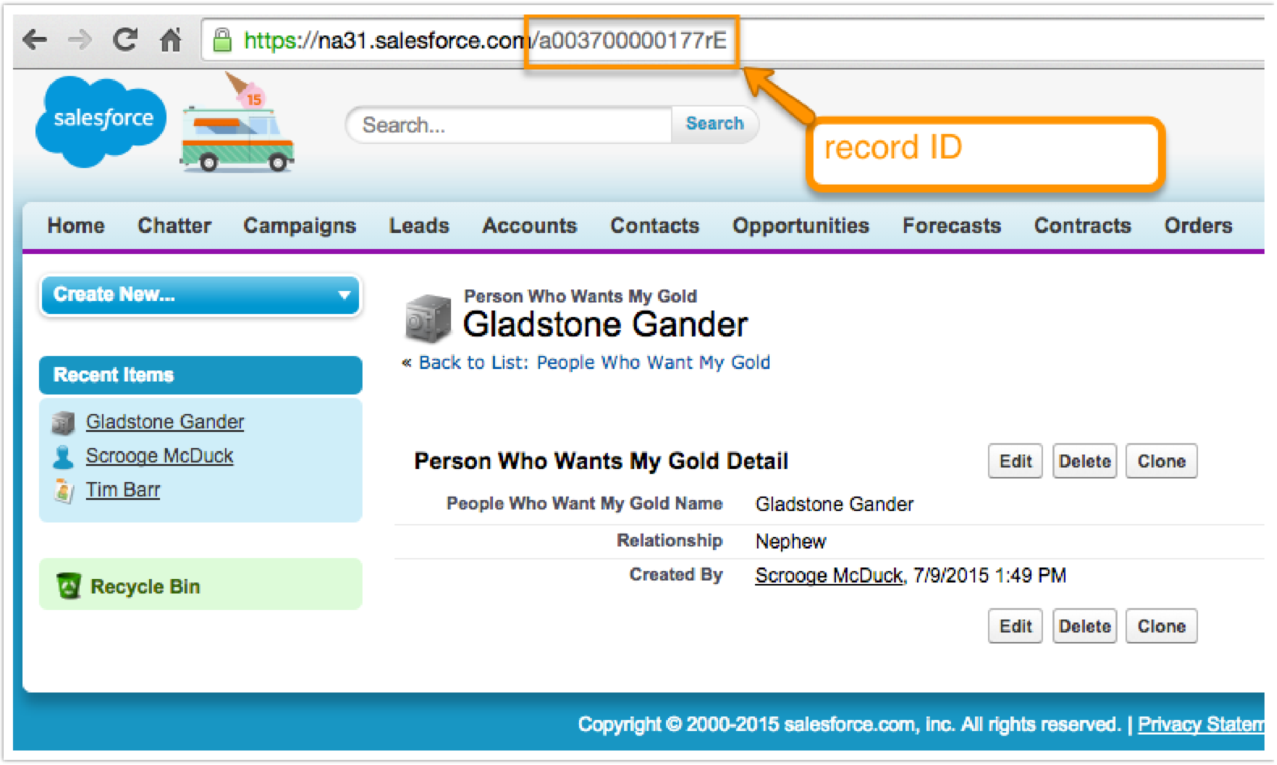


After filling out the survey head back into Salesforce, click on the tab we created earlier for your custom object, and view "All". You should see the record we just created!



Pull from Salesforce

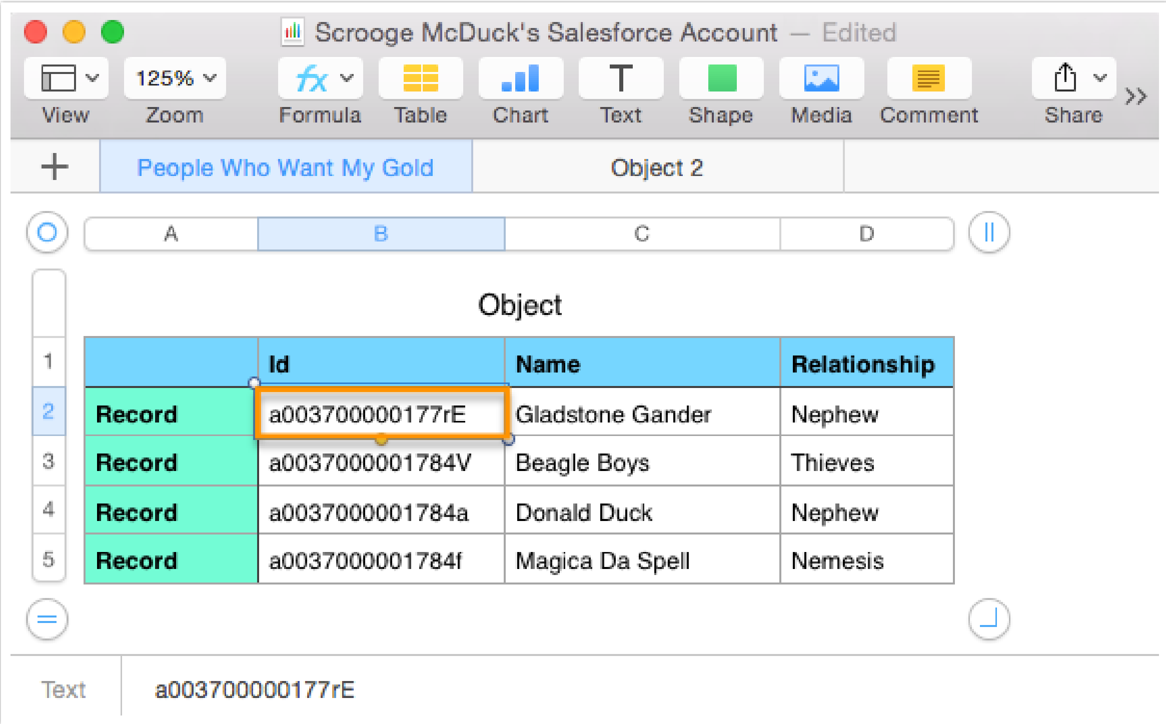
If you'd like to prepopulate your survey with information from Salesforce you can test this out by clicking on our new record, and you can grab the record ID from the URL, here:



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



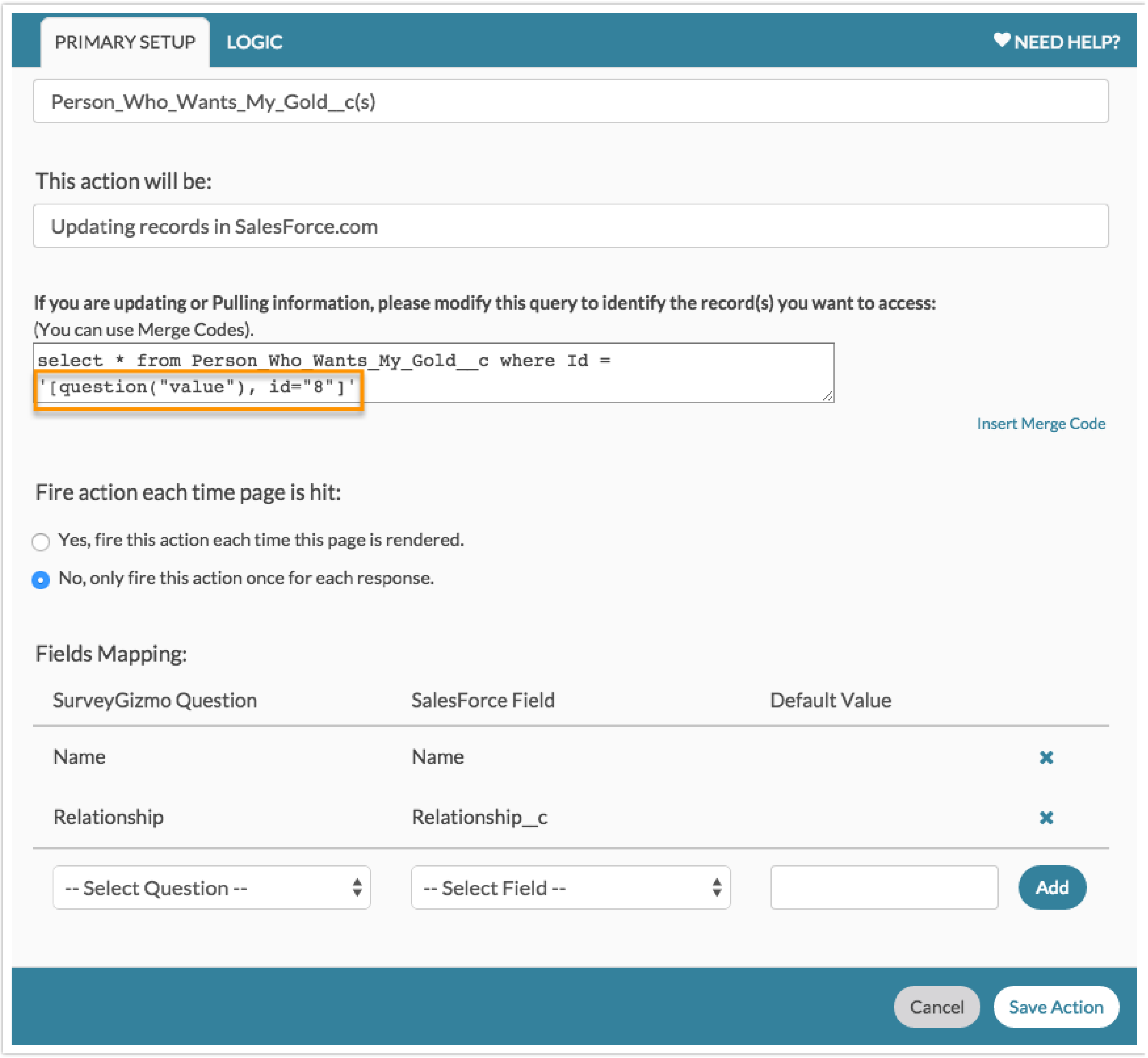
So we're looking inside the People Who Want My Gold table for the Id field and then finding the one that matches the value we feed it (by way of the URL variable merge code we added in). At that point, Salesforce returns the record with all of its data. We're populating the Name and Relationship into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

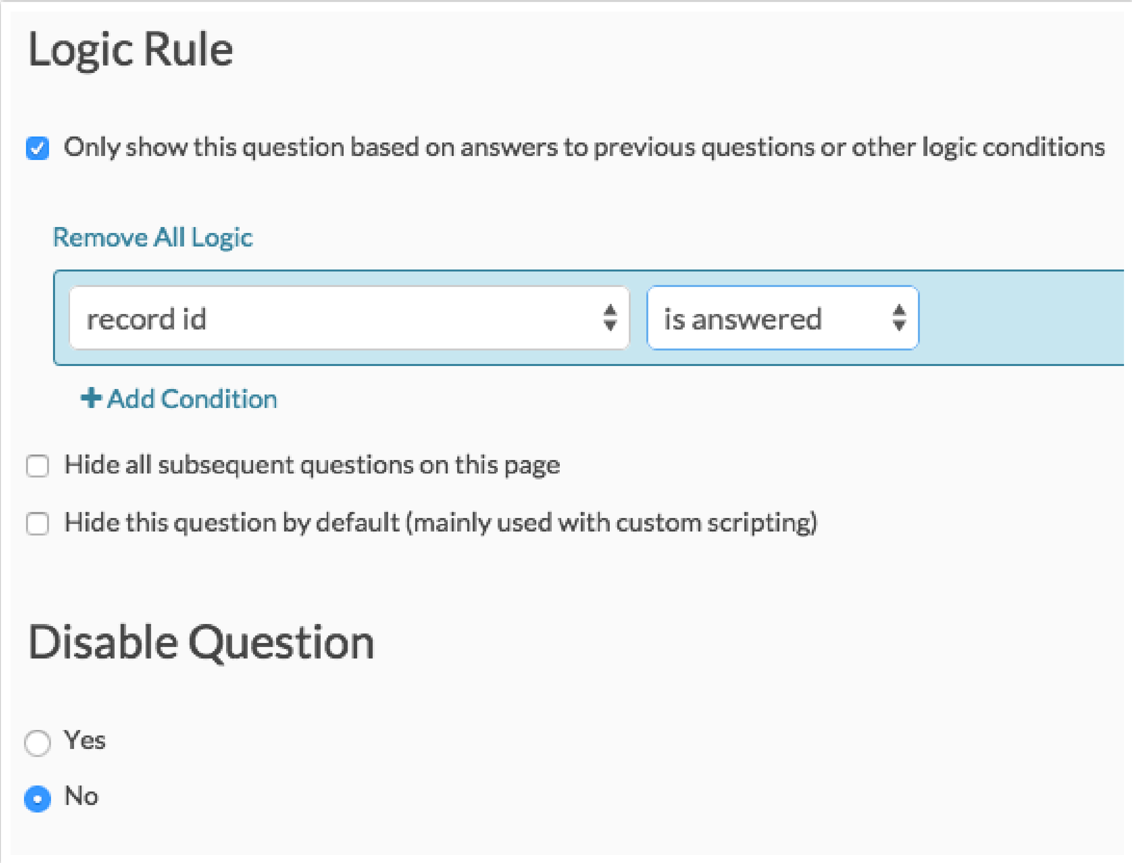


On the first page of our survey let's create a Hidden Value action and prepopulate it with the same merge code we used earlier, [url("recordid")].

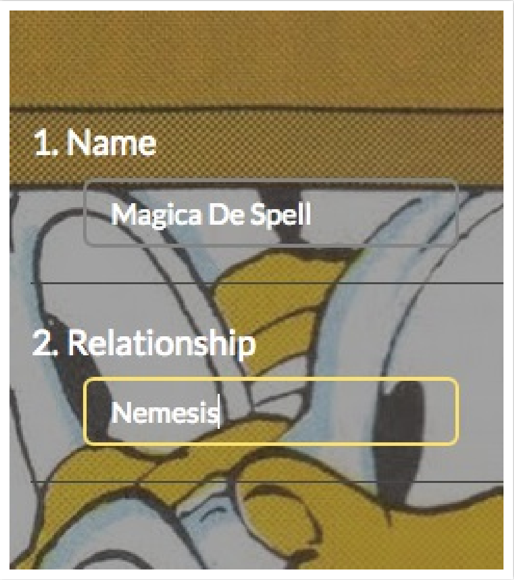
Now on the last page, we need to add a new Salesforce action, this time, to "Update existing records". We'll be setting this one up with a lookup like we did with the Prepopulate action. This time, though we will use a merge code for the hidden value.

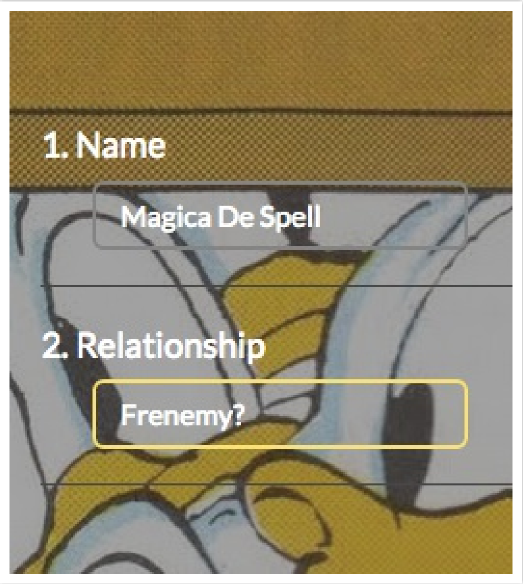
We also need to set up our Update and Add actions with logic so that both don't run at the same time. Easy peasy! We'll just set up our new update action so that it runs when the hidden value storing the record id *is answered*. If there's no record ID it won't run.

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

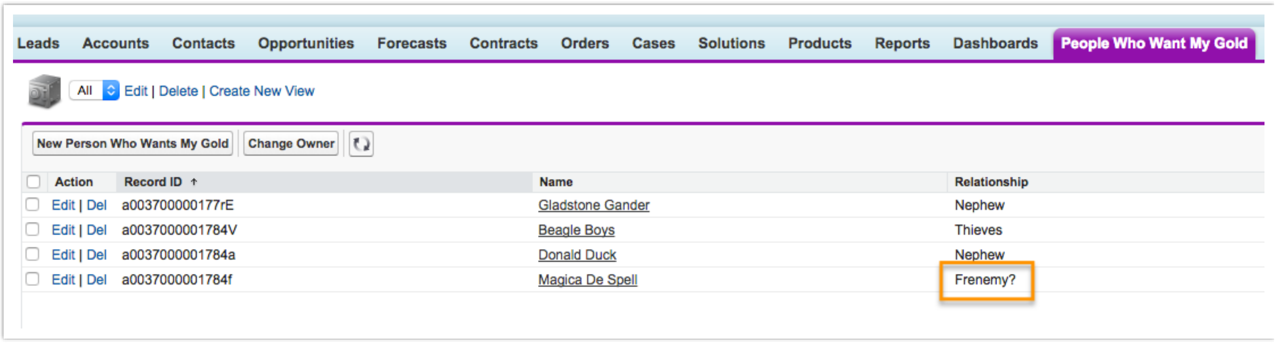


Now if we use a link that passes in one of our record IDs we can update the same record with new information. Let's try http://www.surveygizmo.com/s3/2229617/People-Who-Want-My-Money-Form?recordid=a0037000001784f. It should prepopulate the survey with Magica's information. When we change her relationship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



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!

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