

# Service Cloud Custom CSAT Solution Enablement Guide

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## Part 1: Components

The following components should already exist in your Sandbox or Trial Org. If not, they will need to be added to your Salesforce Org, either through Change Sets or an Unmanaged Package:

Type	Component	Object
Email Template	CSAT Template	
Visualforce Page	CSAT	
Visualforce Page	CSATThankyou	
Apex Class	CSATControllerTest	
Apex Class	CSATController	
Custom Field	Agent Feedback Score	Case
Custom Field	Product Feedback Score	Case
Custom Field	Feedback Comments	Case
Custom Field	Feedback for Agent	Case
Custom Field	Feedback on Agent	Case
Custom Field	Feedback on Product	Case
Static Resource	CSAT	

\*Note that some versions of these components may be named using the word “Feedback” instead of “CSAT”. For example, the Email Template may be named “Feedback Template” instead of “CSAT Template”.

## Part 2: Upload Company Logo

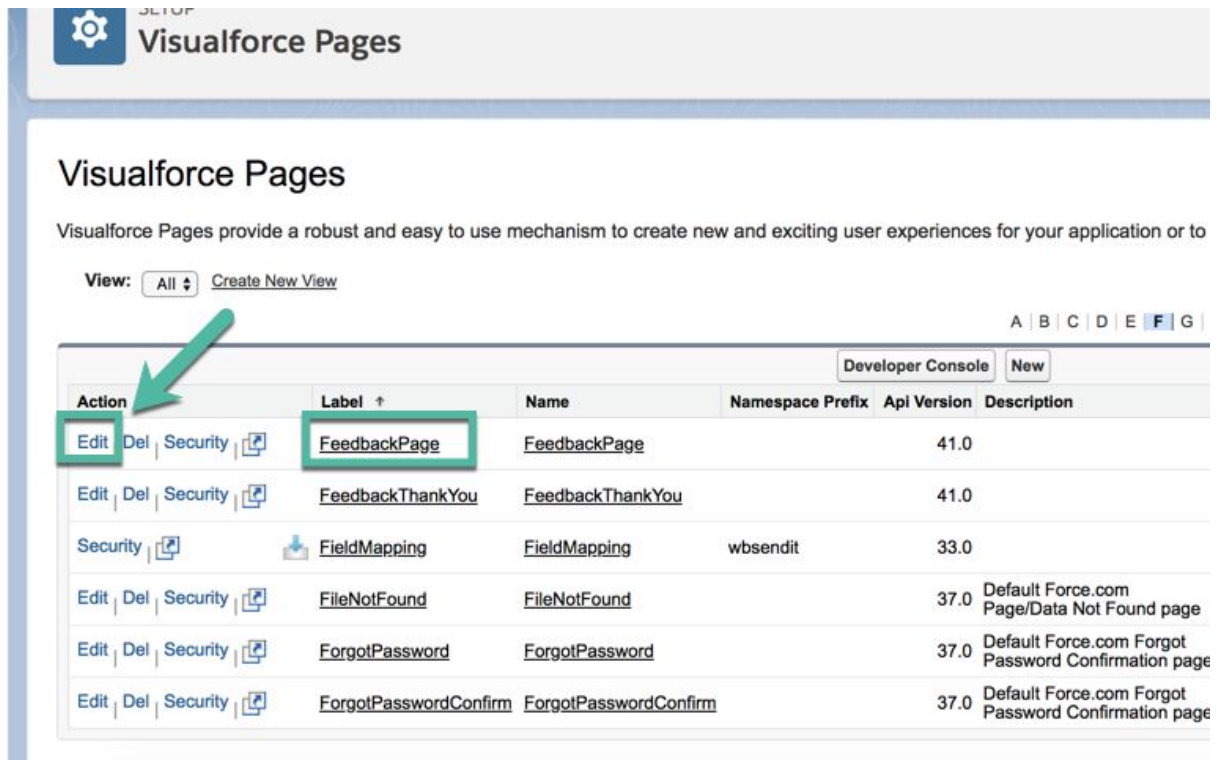
Upload your company logo as a Static Resource. You will want to make sure the logo size is the size you would like your customers to see on the CSAT page. As a benchmark, you might consider keeping your image size within 60-150 pixels high or wide.

1. *Setup > Custom Code > Static Resources*
2. Click **New**
3. **Name:** Company\_Logo
4. Upload the logo file
5. **Cache Control:** Public
6. Click **Save**.

## Part 3: Add Company Logo to Visualforce Pages

You will need to modify 2 Visualforce Pages to add the Company Logo you just uploaded if you wish to display your logo on the CSAT page your customers will see.

1. *Setup > Custom Code > Visualforce Pages*
2. Find the first Visualforce Page we will modify: **CSAT** (may also be named **FeedbackPage**). Click **Edit**.



Action	Label	Name	Namespace Prefix	Api Version	Description
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Security</a>	<b>FeedbackPage</b>	<a href="#">FeedbackPage</a>		41.0	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Security</a>	<a href="#">FeedbackThankYou</a>	<a href="#">FeedbackThankYou</a>		41.0	
<a href="#">Security</a>	<a href="#">FieldMapping</a>	<a href="#">FieldMapping</a>	wbsendit	33.0	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Security</a>	<a href="#">FileNotFound</a>	<a href="#">FileNotFound</a>		37.0	Default Force.com Page/Data Not Found page
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Security</a>	<a href="#">ForgotPassword</a>	<a href="#">ForgotPassword</a>		37.0	Default Force.com Forgot Password Confirmation page
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Security</a>	<a href="#">ForgotPasswordConfirm</a>	<a href="#">ForgotPasswordConfirm</a>		37.0	Default Force.com Forgot Password Confirmation page

3. Within the **Visualforce Markup** tab, search for `<div class="logo">`. Underneath `<div class="logo">`, you will see something similar to the following line:

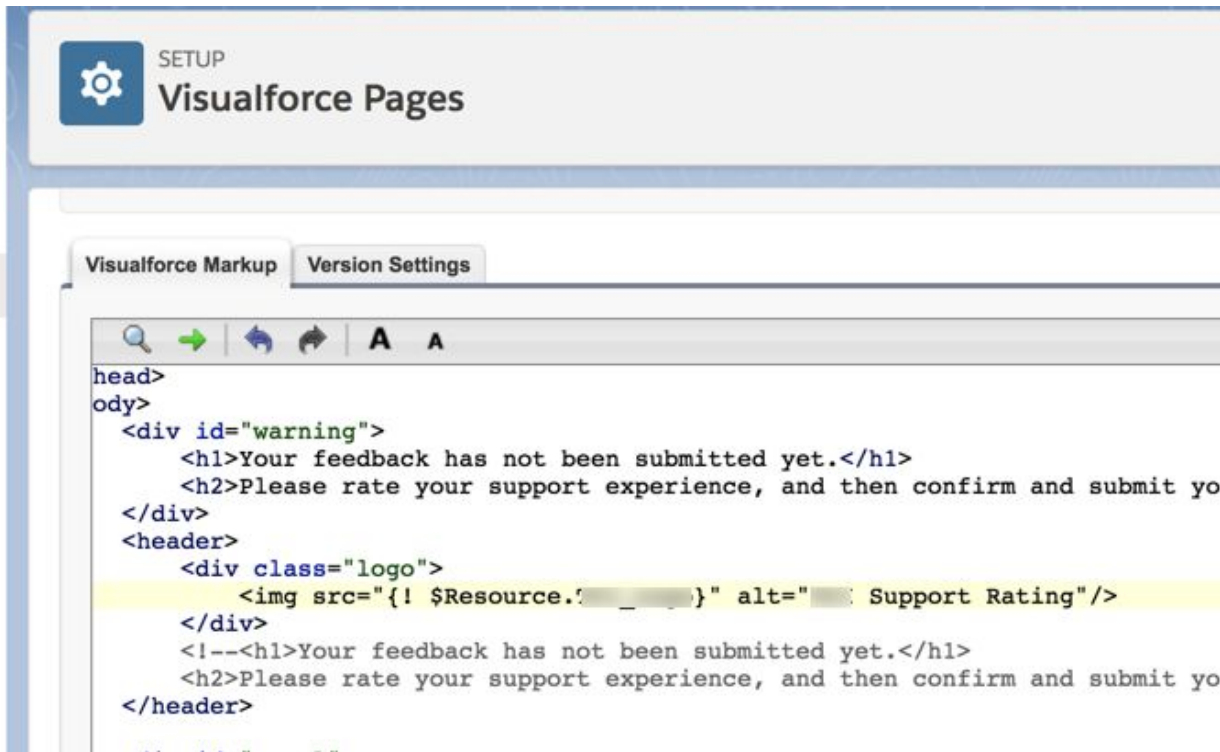
```

```

4. Within that line, you will need to replace the word CSAT (or it might say Feedback) with `Company_Logo`, or the name that you chose for your logo Static Resource in the previous section. You will also need to delete `/SalesforceServiceCloudLogo.png` completely. Lastly, you will need to replace `Desk.com Support Rating` with a name that is appropriate for your company. When you're done, the line should look similar to the following example:

```

```



5. Scroll back to the top and click **Save**.
6. Now repeat steps 2-5 for the second Visualforce Page: **CSATThankyou** (may also be named **FeedbackThankYou**). Don't forget to click **Save**!

## Part 4: Create a Site

Your Site will host the Visualforce pages that your customers will visit to submit their feedback.

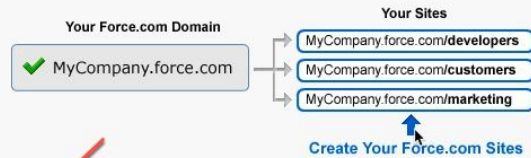
1. *Setup > User Interface > Sites and Domains > Sites*
2. Select a Site name and click **Check Availability**.
3. If your desired domain is available, check the **Site Terms of Use** and click **Register My Salesforce Domain**.
4. Within the **Sites** section, click **New**.

### What is a Site?

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.



Your Salesforce site domain name is `devscs-scs.cs13.force.com`

Salesforce Sites [Terms and Conditions](#)

### Sites (devscs-scs.cs13.force.com)

New

Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By
No records to display.					

5. **Type of New Site:** Guest User License. Click **Continue**.
6. Fill in the fields for your new site:
  - a. **Site Label:** Select a label
  - b. **Site Name:** Will auto-fill based on your Site Label
  - c. **Site Contact:** Select your Admin
  - d. **Default Web:** Leave this field alone. You do not need to add an additional path
  - e. **Active Site:** Unauthorized
  - f. Leave the rest of the settings as default
7. Click **Save**.

**Site Edit** Save Cancel

Site Label  i

Site Name  i

Site Type **Guest User License**

Site Description

Site Contact  i

Default Web Address  i

Active  i

Active Site Home Page  i Preview

Inactive Site Home Page  i Preview

Site Template  i

Site Robots.txt  i

Site Favorite Icon  i

Analytics Tracking Code  i

URL Rewriter Class  i

Enable Feeds

Clickjack Protection Level  i

Require Secure Connections (HTTPS)  i

Upgrade all requests to HTTPS  i

Enable Content Sniffing Protection  i

Enable Browser Cross Site Scripting Protection  i

Referrer URL Protection  i

Guest Access to the Support API  i

Save Cancel

8. Scroll down to the section called **Site Visualforce Pages** and click **Edit**.

**SETUP**  
**Sites**

**Custom URLs** New Custom URL

Action	Domain Name	Path	Certificate and Key	Certificate Expiration
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">View</a>   <a href="#">Preview as Admin</a>	amandafreetrial1.force.com	/		
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">View</a>   <a href="#">Preview as Admin</a>	amandafreetrial1.secure.force.com	/		

**Site Visualforce Pages** Edit

Visualforce Page Name	AppExchange Package Name
<a href="#">BandwidthExceeded</a>	
<a href="#">Exception</a>	
<a href="#">FileNotFound</a>	
<a href="#">ForgotPassword</a>	
<a href="#">ForgotPasswordConfirm</a>	
<a href="#">InMaintenance</a>	
<a href="#">SiteLogin</a>	
<a href="#">SiteRegister</a>	
<a href="#">SiteRegisterConfirm</a>	
<a href="#">SiteTemplate</a>	
<a href="#">Unauthorized</a>	

9. Add the **CSAT** and **CSATThankyou** Visualforce Pages to the enabled section (may also be named **FeedbackPage** and **FeedbackThankYou**).

## Enable Visualforce Page Access

Select the Visualforce pages that you want to make accessible at this Force.com site.

Available Visualforce Pages

- CommunitiesLanding
- CommunitiesLogin
- CommunitiesSelfReg
- CommunitiesSelfRegConfirm
- CommunitiesTemplate
- IdeasHome
- MilestoneTracker
- MyProfilePage
- ReservationByContact
- SiteTemplate
- SocialPersonaRelatedList
- StdExceptionTemplate
- UnderConstruction
- demoAdapterPage

Enabled Visualforce Pages

- BandwidthExceeded
- Exception
- FileNotFound
- ForgotPassword
- ForgotPasswordConfirm
- InMaintenance
- ServiceCloudTrialSignUp
- SiteLogin
- SiteRegister
- SiteRegisterConfirm
- Unauthorized
- FeedbackPage
- FeedbackThankYou

Buttons: Save, Cancel, Add, Remove

10. Click **Save**.

11. You should now be back at your Site main page. Scroll to the top and click **Activate**.

Site Details

### Service Cloud Free Trial Feedback

[Back to List: Sites](#)

Site Detail

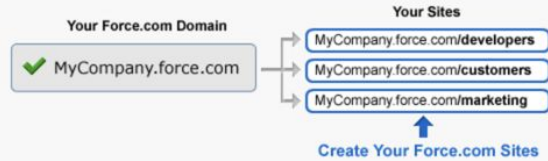
Site Label	Service Cloud Free Trial Feedback	Site Name	Service_Cloud_Free_Trial_Feedback
Site Type	Guest User License	Site Description	
Site Contact	Amanda Chiu	Active	<input type="checkbox"/>
Login	Not Allowed	Active Site Home Page	<a href="#">Unauthorized [Preview]</a>
Site Favorite Icon		Inactive Site Home Page	<a href="#">InMaintenance [Preview]</a>
Site Photo	tvf	Site Template	SiteTemplate [Preview]

12. Finally, go back to your list of **Sites** within Setup (*Setup > User Interface > Sites and Domains > Sites*). Copy the **Site URL**. You will need to paste this URL into the **Email Template** in the next section.

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically, allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, or marketing.



Your Salesforce site domain name is **amandafreetrial1.force.com**

Salesforce Sites [Terms and Conditions](#)

Sites (amandafreetrial1.force.com) <span style="float: right;">New</span>						
Action	Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By
<a href="#">Edit</a>   <a href="#">Activate</a>	Service Cloud Free Trial Feedback	<a href="http://amandafreetrial1.force.com/">http://amandafreetrial1.force.com/</a>		<input type="checkbox"/>	Force.com	Amanda Chiu, 2/15/2018 3:03 PM

## Part 5: Modify the Email Template

You will need to update the Email Template with the URL for the Site you created in the last section. When customers receive your Email Template, they will click on the feedback request and be taken to your Site.

1. *Setup > Email > Email Templates*
2. Within the **Services Template** Folder, locate **CSAT Template** (may also be named **Feedback Template**). Click into the **Email Template Name**.





SETUP

## Email Templates

### Services Templates

#### Email Template Availability

Folder: Services Templates [Edit](#) | [Create New Folder](#)

A | B | C | D | E | F | G | H | I | J | K | L |

[New Template](#)

Action	Email Template Name ↑	Template Type	Available For Use	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Auto-Response Email to Customer</a>	HTML	✓	Automatic Response email to be sent to customer when a new case is received
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Case Assignment Notification</a>	HTML	✓	Notification email to be sent to User when a new case has been assigned to the
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Case Comment</a>	HTML	✓	Sent to customer when new comments are added to a case. Change this in Setup > Self-Service Portal > Settings > Self-Service Setup.
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Default Template Custom</a>	Custom	✓	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Feedback Template</a>	Custom	✓	

### 3. Click **Edit HTML Version**.



SETUP

## Email Templates

Custom Email Template

### Feedback Template

[« Back to List: Visualforce Pages](#)

Preview your email template below.

#### Email Template Detail

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

Folder	Services Templates	Available For Use	
Email Template Name	Feedback Template	Last Used Date	
Template Unique Name	Feedback_Template	Times Used	
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)		
Author	Naveen Nazimudeen <a href="#">[Change]</a>		
Description			
Created By	Naveen Nazimudeen, 11/21/2017 7:03 PM	Modified	

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

#### Email Template

[Send Test and Verify Merge Fields](#)

**Subject** Re: {!Case.Subject}

#### HTML Preview

Hi {!Contact.FirstName},

- There are 4 URLs within the HTML that need to be replaced with your Site URL. You can locate each spot by searching for: `<span class="customer-feedback-rating">`
- Underneath `<span class="customer-feedback-rating">` there will be a few lines that looks something like the following:

```
<a  
href="http://INCLUDEYOURSITEDOMAINHERE.com/CSAT?CaseID={!Case.Id}&Score=2  
&AgentName={!User.Name}" style="text-decoration: none;">
```

6. Replace the following portion of those lines with the entire Site URL you copied in the previous section. Do not replace any other parts of these lines.

```
<a  
href="http://INCLUDEYOURSITEDOMAINHERE.com/CSAT?CaseID={!Case.Id}&Score=2  
&AgentName={!User.Name}" style="text-decoration: none;">
```

7. Make sure you repeat those steps for all 4 sections. When you are done, you should have replaced 4 URLs in total.
8. When you're done, click **Save**.

## Part 6: Adding the Custom Fields to the Console

There are 4 custom fields that are part of the Agent CSAT. You can update your Case Page Layout to include some of them within the Case Details. The smiley face field should already be added to a custom component in your Lightning Console to give your agents a quick view of the rating when they open a Case. If it has not been added to your Sandbox or Trial Org, you can create a custom Case Action and add it into your Lightning Console.

**Agent Feedback Score:** Picklist with values 1-4, assigned based on the customer's rating. This field does not need to be added to the Case Page Layout.

**Feedback on Agent:** Formula field that displays a smiley image based on the picklist field Agent\_Feedback\_Score. Green smiley = 4, red angry face = 1. We recommend using this field on the Case Page Layout and Console.

**Feedback Comments:** Long text field that contains the customer's written feedback comments. We recommend using this field on the Case Page Layout.

**Feedback for Agent:** This text field will display the name of Agent that owned the Case when the feedback was given. We recommend using this field on the Case Page Layout.

Your Lightning Console should already be using a custom component with the **Feedback on Agent** field:

**Case Details**

Case Number: 00077539  
 Case Owner: Amanda Chiu  
 Status: Pending  
 Priority: High  
 Feedback on Agent  
 Subject: Test Case for Agent Training  
 Description: Test macro action

**Contact Details**

Name: Sarah Pickles  
 Title: Holding Account  
 Email: amanda.chiu@salesforce.com  
 Account Name: Holding Account  
 Phone:

**Test Case for Agent Training**

**FEED** DETAILS

Email Post Update Case Social

Create new... Add

Most Recent Activity Search this feed...

All Updates Emails Call Logs Text Posts Status Changes

teachtcifedback Site Guest User (Customer)  
 Case updated  
 Yesterday at 11:11 AM  
 Agent Feedback Score: 4 to 3  
 Feedback Comments: Changed

**Milestones**

You completed all the miles

**RELATED**

Emails (3+)

Re: Test Case for Agent  
 From Ad... info@teacht  
 To Addr... amanda.chi  
 Message... 2/15/2018

Re: Test Case for Agent  
 From Ad... info@teacht  
 To Addr... amanda.chi  
 Message... 2/13/2018

Re: Test Case for Agent  
 From Ad... info@teacht  
 To Addr... amanda.chi  
 Message... 2/13/2018

History Omni-Channel Notes Macros

You can create an additional section in your Case Page Layout to show feedback fields:

Setup Home Object Manager

Case

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields	Agent Receiving F...	Case Origin	Case Source	Contact Fax	Created By	Description	Entitlement
Blank Space	Asset	Case Owner	Category	Contact Mobile	Date/Time Closed	Desk Agent	Entitlement
Account Name	Business Hours	Case Reason	Closed When Created	Contact Name	Date/Time First R...	Desk Case ID	Entitlement
Agent Feedback Score	Case Number	Case Record Type	Contact Email	Contact Phone	Date/Time Opened	Desk Label	Escalated

Contact Phone: 1-415-555-1212  
 Entitlement Name: Sample Entitlement  
 Escalated: ✓  
 First Contact Close: ✓  
 First Response Sent: ✓  
 Date/Time First Response: 2/16/2018 5:08 PM

**Description Information**

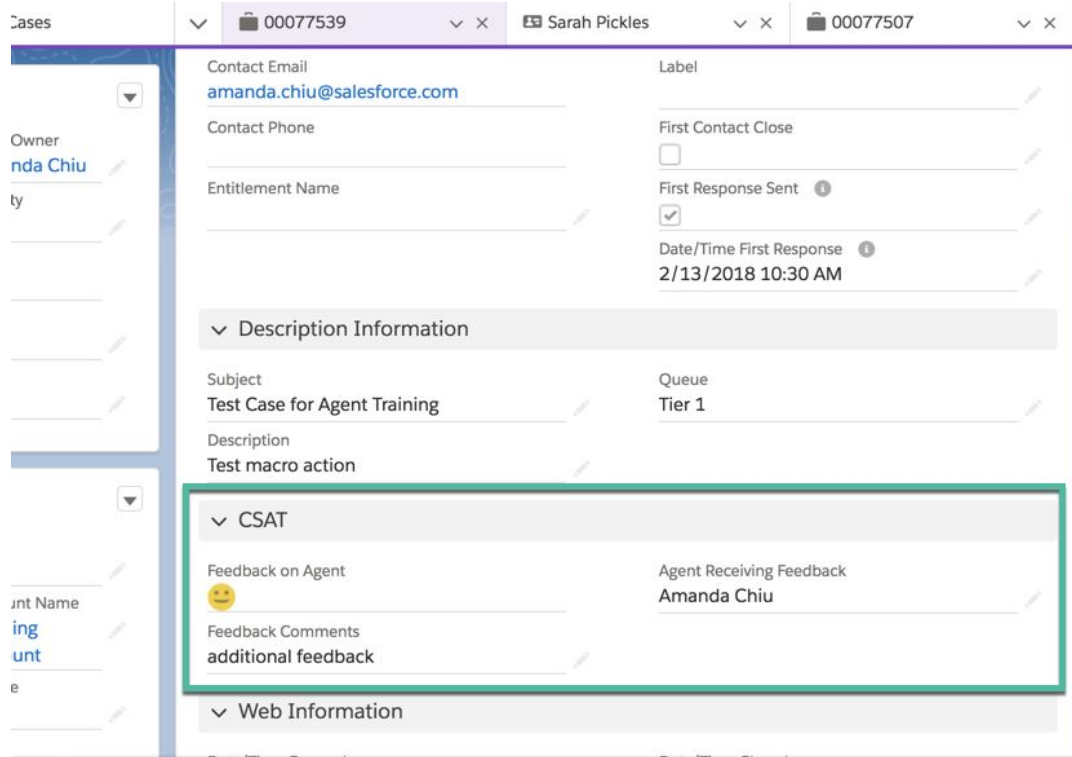
Subject: Sample Subject  
 Queue: Sample Queue

**CSAT**

Feedback on Agent: Sample Feedback on Agent  
 Feedback Comments: Sample Feedback Comments  
 Agent Receiving Feedback: Sample Agent Receiving Feedback

Web Information

The changes to your Case Page Layout will appear within the Case Details:



## Part 7: Optional: Add Product Feedback Rating

If you would like to add an additional question in your feedback form for your customers to rate your Product, you can do so by removing the comments within your Visualforce Page and adding the Product related feedback fields back into your Console.

1. There is 1 Product feedback related section within the **CSAT** Visualforce Page (may also be named **FeedbackPage**) that has been commented out. You will need to locate it and remove the comment code so that the code is active in the page.

```

</td>
</tr>
</tbody>
</table>
</div>
<!-- PRODUCT RATING HAS BEEN COMMENTED OUT. REMOVE THIS COMMENT IF YOU'D LIKE TO INCLUDE PRODUCT RATING
<div class="section tooltip-bottom" data-tooltip="This rating is for Desk as a product. Not the support person.">
<h3>How happy are you with Salesforce Service Cloud as a product?</h3>
<table align="center">
<tbody>
<tr>
<td style="padding-right: 20px;">
<label><br/>
<input type="radio" name="productFeedbackScoreRadio" value="4" onclick="changeValue(this, '{!$Component.productFeedbackScore}')"/></label>
</td>
<td style="padding-right: 20px;">
<label><br/>
<input type="radio" name="productFeedbackScoreRadio" value="3" onclick="changeValue(this, '{!$Component.productFeedbackScore}')"/></label>
</td>
<td style="padding-right: 20px;">
<label><br/>
<input type="radio" name="productFeedbackScoreRadio" value="2" onclick="changeValue(this, '{!$Component.productFeedbackScore}')"/></label>
</td>
<td>
<label><br/>
<input type="radio" name="productFeedbackScoreRadio" value="1" onclick="changeValue(this, '{!$Component.productFeedbackScore}')"/></label>
</td>
</tr>
</tbody>
</table>
</div>
-->
<!-- FEEDBACK SECTION -->
<div class="section last">
<p class="pleft">Tell us more about your experience. What was great and what could have been improved?</p>
<label for="feedback"></label><apex:inputTextArea id="feedback" value="{!feedbackComments}"/></apex:inputTextArea>

```

- Optional: It is recommended that you go through the entire Visualforce Page to update any wording and language to reflect that you are now asking for both Product and Agent feedback ratings, instead of just an Agent rating. You will also want to go through the **CSATThankyou** page (may also be named **FeedbackThankYou**) to check for any wording you'd like to update. And to round things out, we recommend you check your Email Template called **CSAT Template** (may also be named **Feedback Template**) to update any wording there as well.
- The following two Case custom fields are associated with Product Feedback. You will need to add one of them to your Lightning Console and/or Case Page Layout for your team to see Product Feedback on the Case:

**Product Feedback Score:** Picklist with values 1-4, assigned based on the customer's rating

**Feedback on Product:** Formula field that displays a smiley image based on the field Product\_Feedback\_Score. Green smiley = 4, red angry face = 1. We recommend using this field on the Case Page Layout and/or Console.