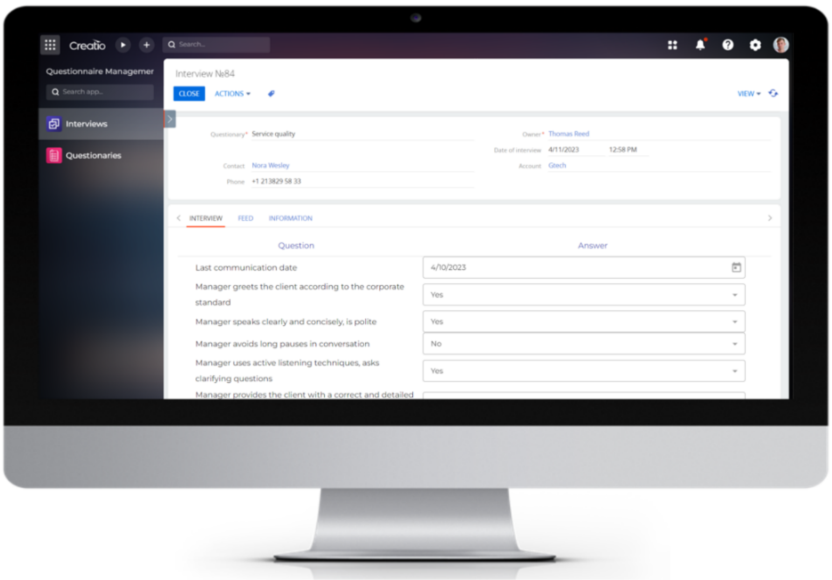
SALES'UP QUESTIONNAIRE MANAGEMENT FOR CREATIO



Guide to setup and utilization

12.12.2023

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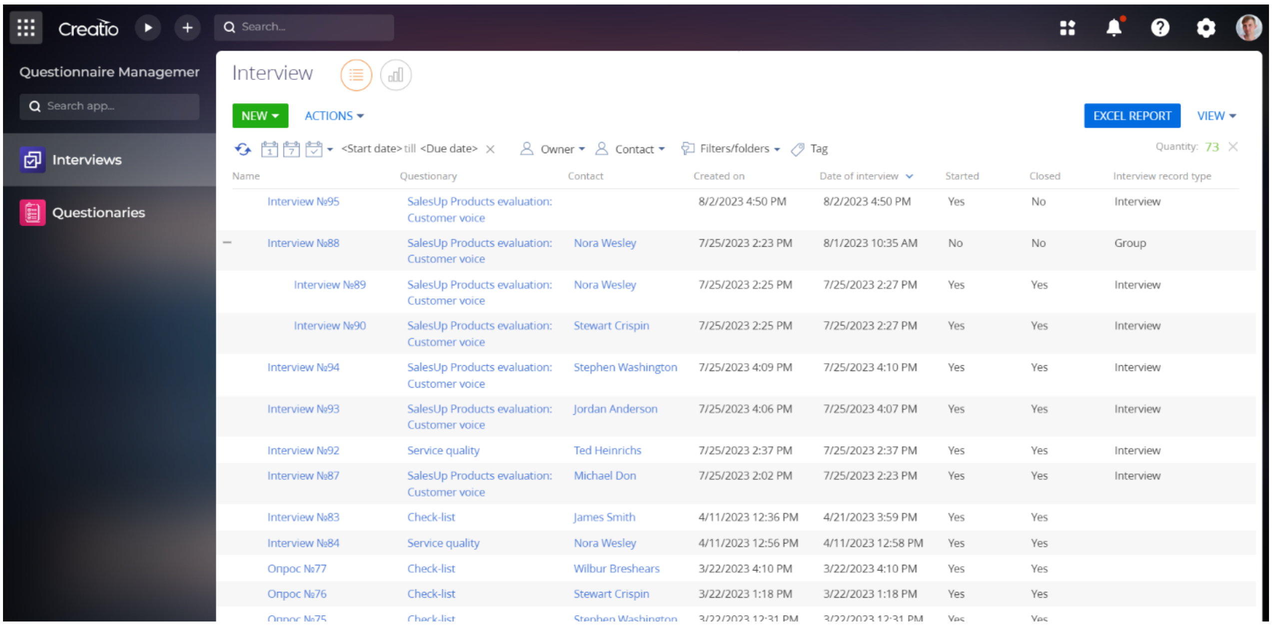
Product description

The **Sales’Up Questionnaire management for Creatio** product allows to easily maintain information about interviews and questionnaires within the company and outside the company.

The functionality allows you to create interviews with different answer options, launch a specific business process depending on the selected answer, customize the display of questionnaires to see the full picture of the interview, and quickly collect analytics on the interviews done in the program.

For the correct operation of the "Interview" section, you need to configure the questionnaire templates in the "Questionnaires" section with the settings included in it.



Utilization options

- E-shops for the evaluation of the customers’ satisfaction level;
- Trade representatives for making visits at trade points;
- HR department for creating internal polls;

Capabilities

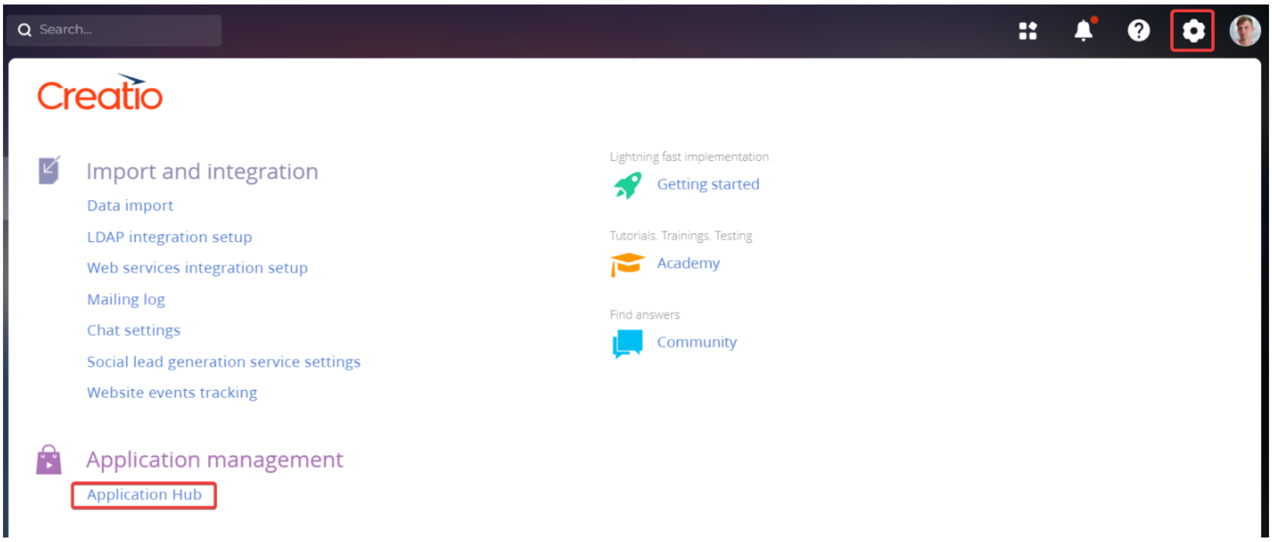
- Create polls using different options: with one or several answer options, open questions, etc.;
- Manage the order of questions and fix the time of interviews;
- Customize the display of different questionnaires depending on the account, territory and qualifications of your employees;
- Create double, blind and training visits to monitor and evaluate the performance of your employees;
- Collect analytics from interviews conducted in Creatio.

Technical requirements

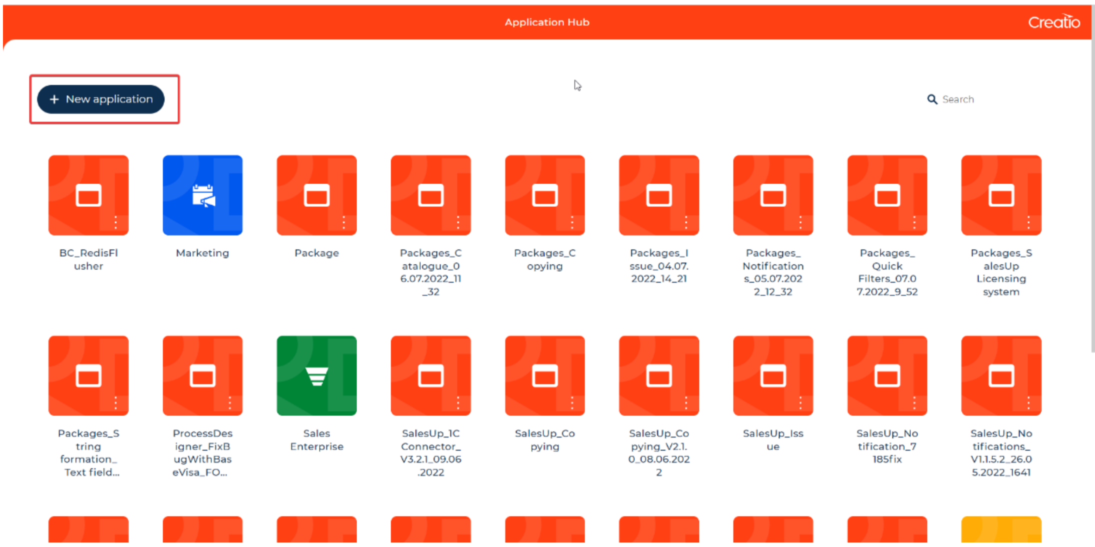
The product is compatible with all products on the Creatio platform version 7.10 and higher.

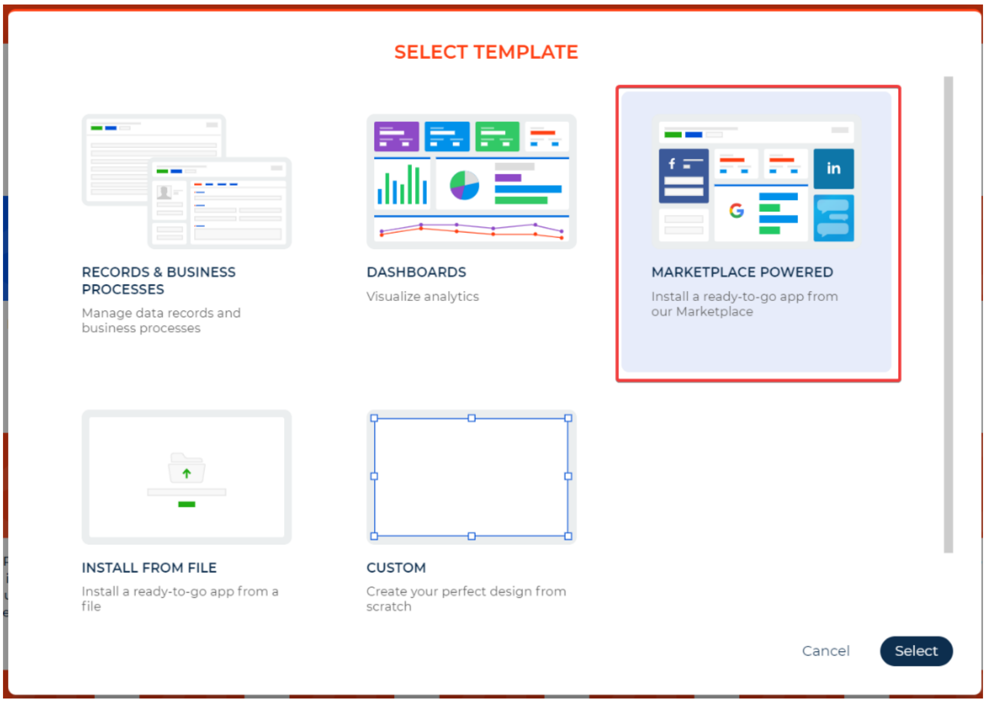
Product installation and configuration

To install packages, open System Designer and go to Application Hub

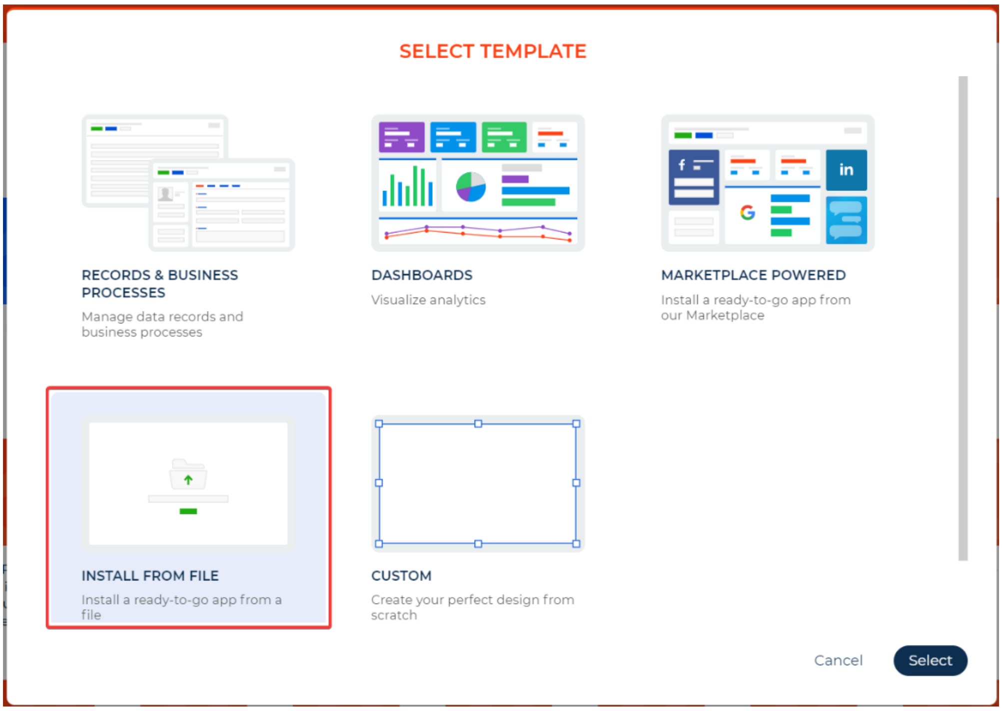


On the Application Hub page, click the "New application" button, then "Install from Marketplace", specify the address of the stand and click "Install".





In the case of creating product packages from a file, you need to request the current package from Sales'Up support. Next, on the "Application Center" page, click "Install from file", specify the path to the archive with the package and perform the installation.

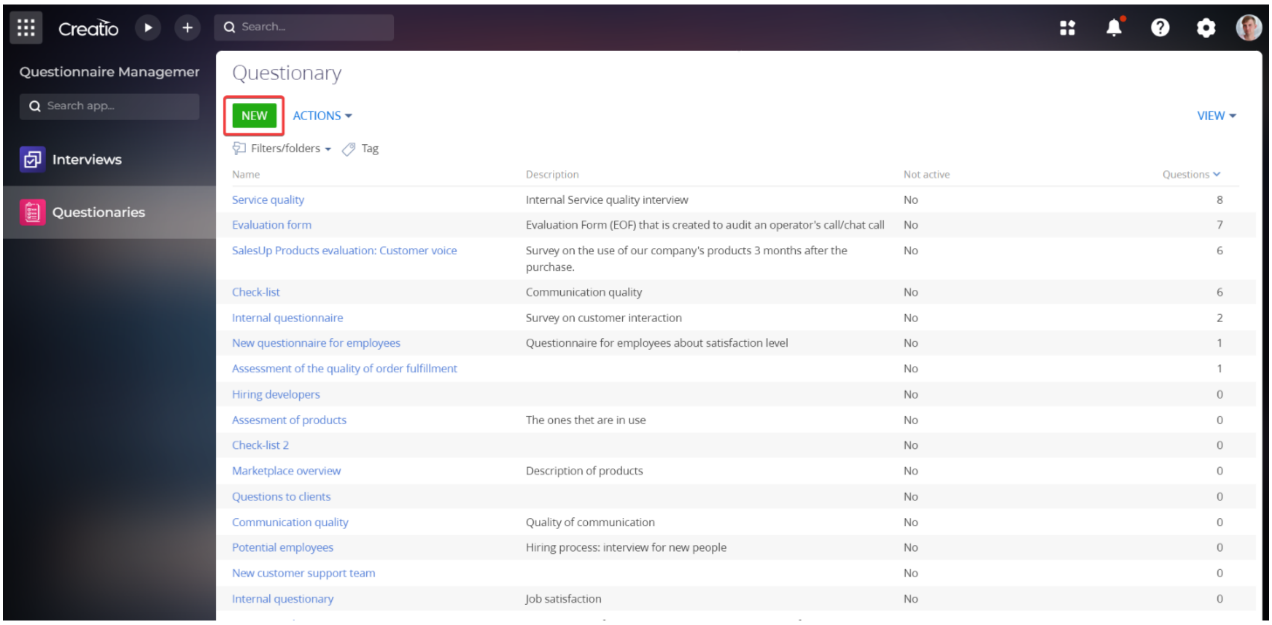


General configuration

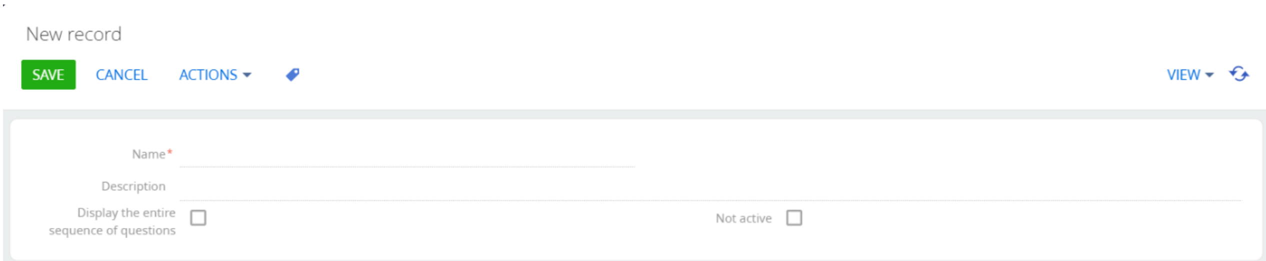
Questionary setup

To create a new questionnaire:

Go to the "Questionnaires" section and click on the "NEW" button



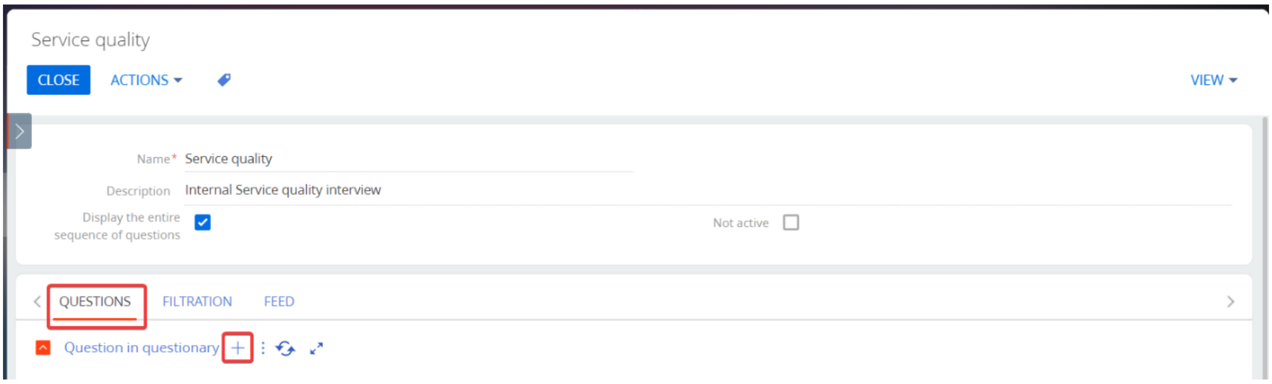
On the page of the new questionnaire, you must fill in the mandatory and additional fields:



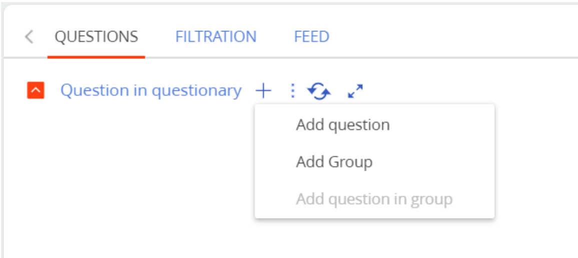
- "Name" is a mandatory field. Specify the name of the future questionnaire, which will be displayed in the register of the section.
- "Description" - if necessary, add a description for the future questionnaire, for example: "Questionnaire for conducting an internal interview in the company by the HR department."
- "Display the entire sequence of questions" - if the check box is active for the current questionnaire, the entire sequence of questions in the interview will be displayed. If the value of the check box is inactive, the user will see the next question of the questionnaire only after saving the answer to the previous question.
- "Not active" - if the check box is active, the current questionnaire will not be available for selection in the future interview.

Adding questions to the questionnaire

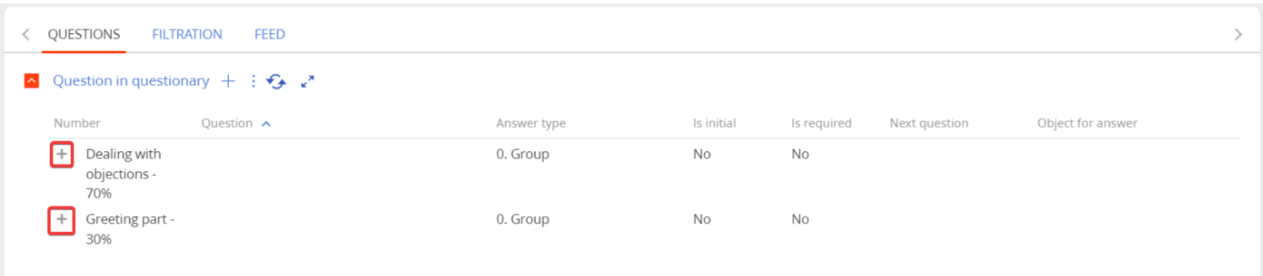
On the questionnaire page, the user has access to the "Questions", "Filtration" and "Feed" tabs. To add questions to the questionnaire, on the "Questions" tab, click "+" on the "Questions in the questionnaire" details:

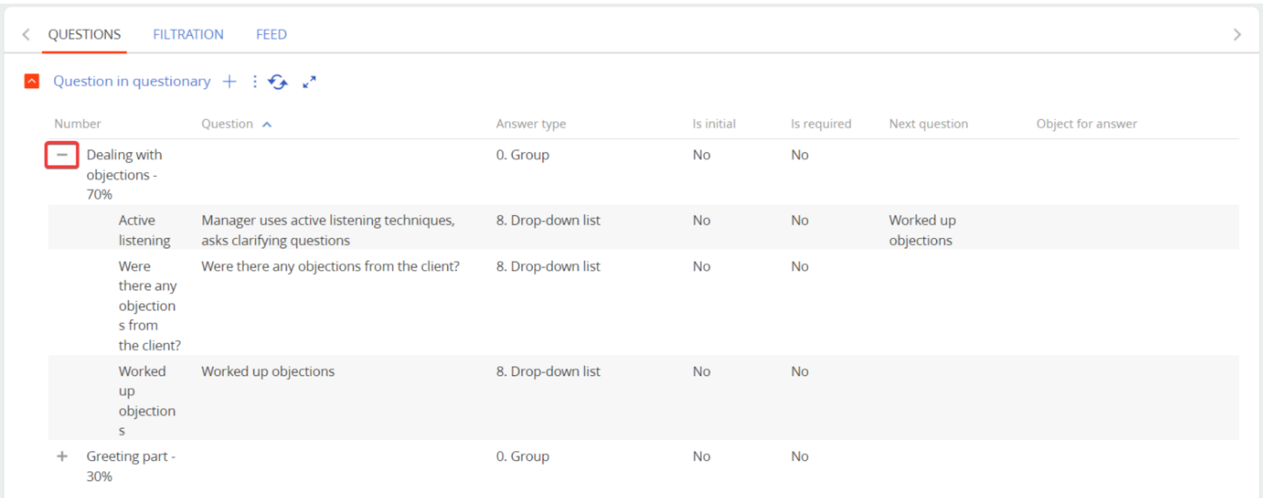


"Add question" and "Add group" actions are available to the user



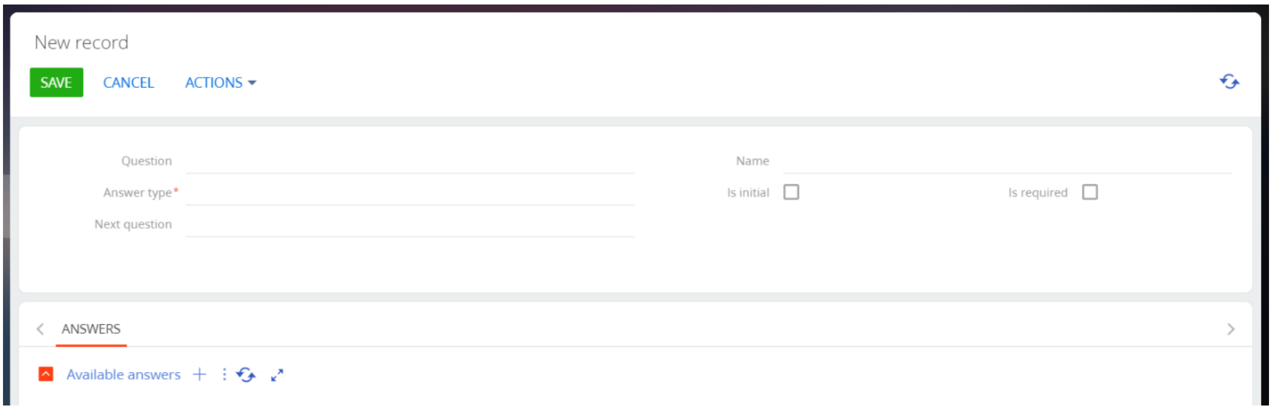
Note: *the action "Add group" allows you to combine one or more questions related in content into a certain group for the convenience of passing the interview. Allowing the user to collapse or expand a specific block of questions in the interview.*





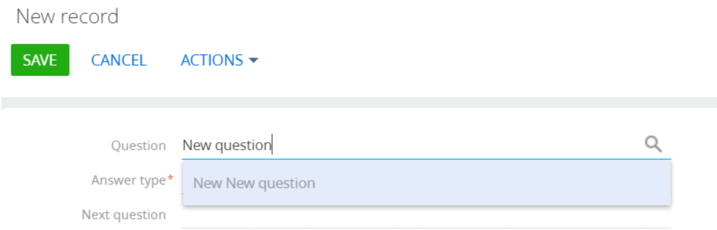
Note. If a group of questions already exists in the questionnaire, the action "Add question to group" becomes available to the user

After performing the "Add question" action, the question setting page opens, where the user must fill in the mandatory and additional question setting fields:

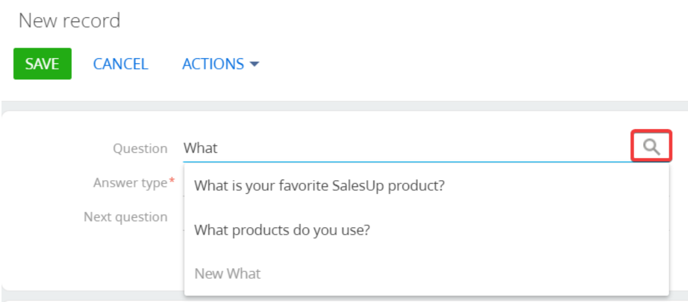


- "Question" - the user can choose an existing question from the "Question" lookup or create a new one during the creation of the questionnaire.

In order to add a new question, enter the test question in the "Question" field and click on the value of the drop-down list with the note "New"

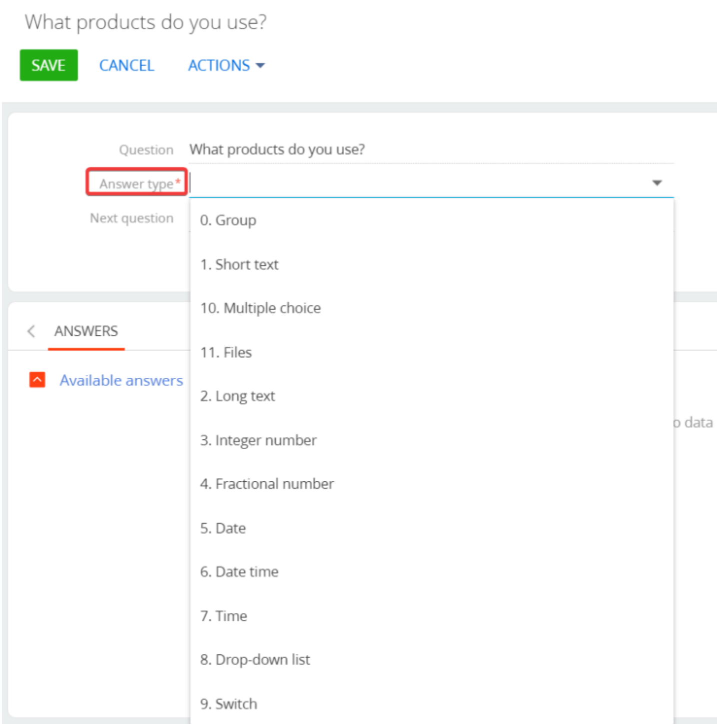


To select an existing question from the lookup, start entering the question and select the required question from the drop-down list, or click on the button to select a value from the lookup.



- "Name" - after selecting or adding a new question, the "Name" field is filled automatically with the value of the "Question" field, but the user can change the value of this field, which will be displayed in the register of the "Question" detail.
- "Answer type" - The following types of questions are available to the user:
  - Group;
  - Short text;
  - Multiple choice (if several answer options must be selected in the interview);
  - Files (if you need to attach a file during the interview);
  - Long text (implying a detailed answer to the question);
  - Integer number;

- Fractional number;
- Date;
- Date and time;
- Time;
- Drop-down list (for choosing the provided answer option from the drop-down list);
- Switch (for choosing one value from several proposed answer options).



- "Next question" - can be filled in manually, or will be filled in automatically after preparing all questions and specifying the sequence of questions in the "Question" details.
- "Initial" - when the check box is activated, the question will be defined as the initial one in the interview.
- "Is required" - when the check box is activated, it will be impossible to move to the next question or complete the interview without filling in the value in the field with the "Mandatory" check box.

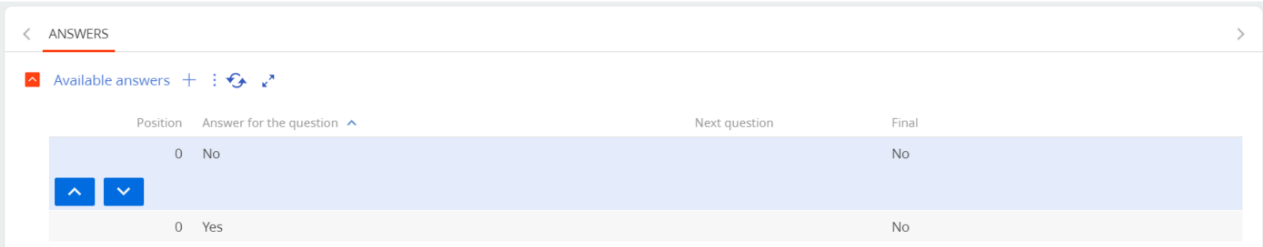
Adding answers to the questions

For question types "Multiple choice", "Drop down list", "Switch" you need to add answer options.

To do this, click the "+" button on the "Available answers" details of the question page.

The user can add a new answer option to the "Answer" guide, or select the required option from the already existing values of the guide.

In addition, after adding the necessary answer options to the question, the user can adjust the sequence of display of answers during the passage of the future interview.

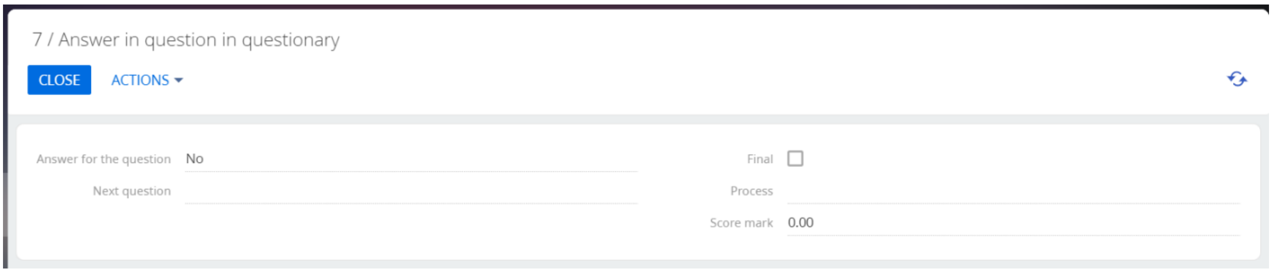


Using the arrows on the record of the detail, arrange the necessary sequence of displaying the answers.

Additional setup for the answers to the questions

Depending on the answer option, the user can make additional settings for the answer.

For additional settings, double-click on the required answer option of the "Available answers" detail of the question setting.



- "Final" - if the check box is active, the answer to this question will complete the interview process.

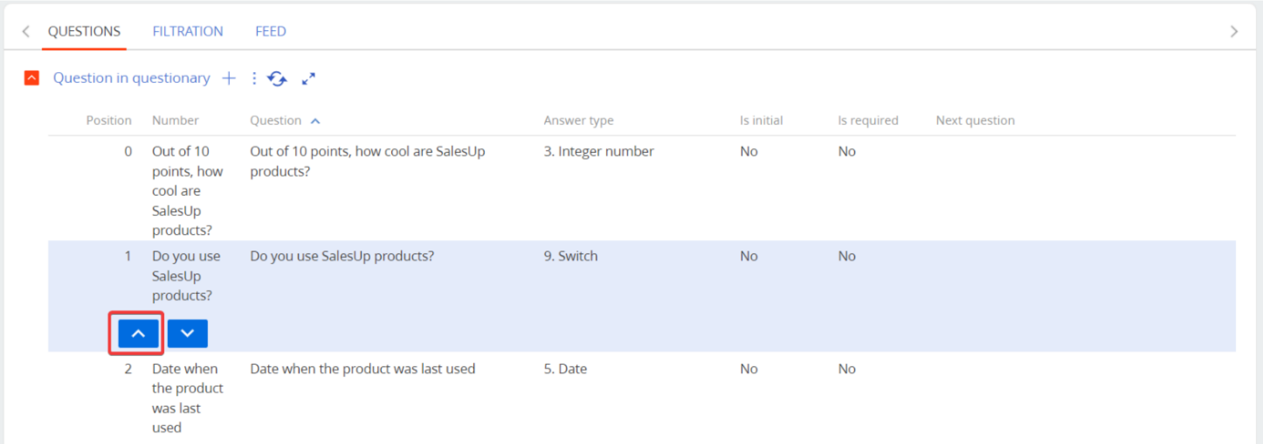
For example, for a product satisfaction interview, the first question would be "Do you use our products?" with two answer options - "Yes" or "No". If the answer is "Yes", the user will go to the next question, and if the answer is "No", the interview will end, since all the following questions will make sense only for those who use the company's products.

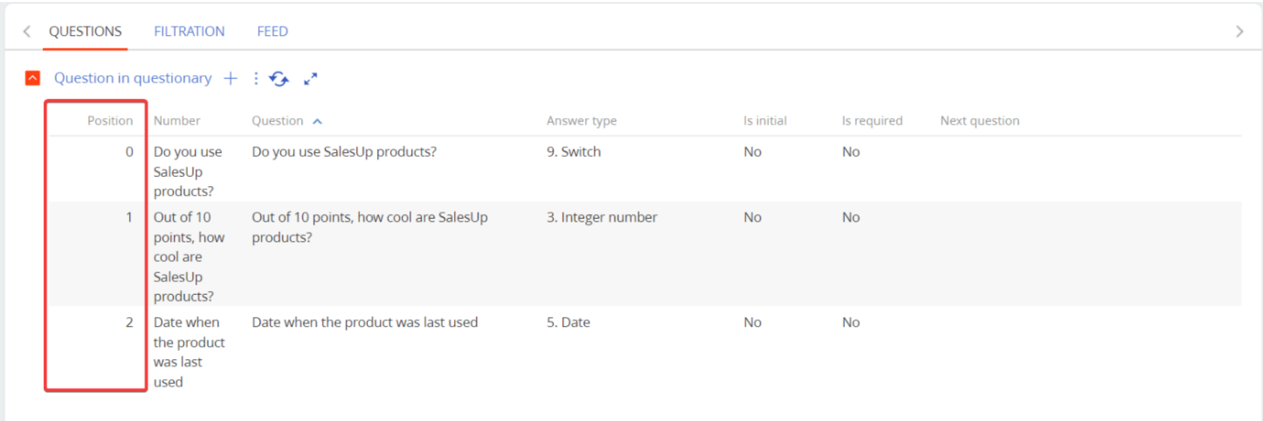
- "Process" - the user can add a business process that will be launched after selecting the current answer to the question in the questionnaire.
- "Score mark" - the user can assign one or another evaluation to the answer, in order to analyze in the future, for example, the average value of the answer to the current question among all respondents on the questionnaire.

For example, the question "How do you rate the quality of the support service?" with the response options "Very Good", "Good", "Neutral", "Bad", "Terrible", where "Very Good" is the highest score of 5 and "Terrible" is a score of 1, respectively. In this way, the user will be able to identify the average level of satisfaction with the work of the support service among all those interviewed on the questionnaire.

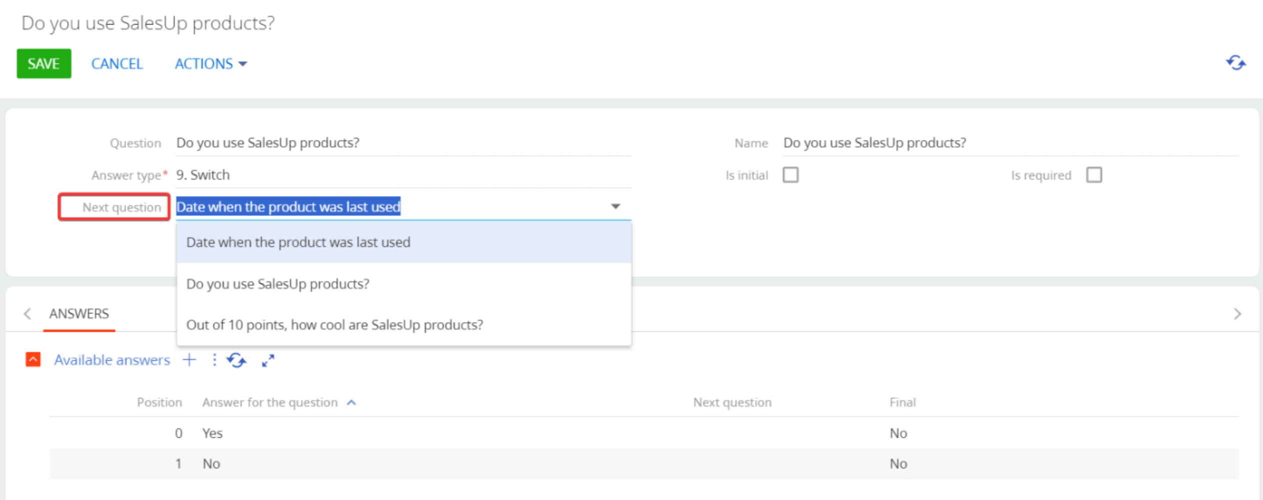
The question order in the questionary

After creating all the necessary questions and options for answering them in the questionnaire, the user can quickly change the order of displaying the questions in the questionnaire.





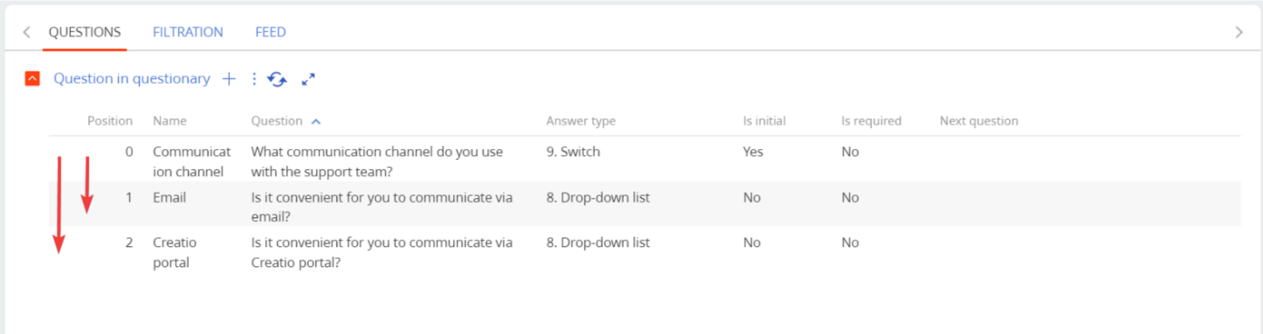
Or the user can manually configure the transition from one question to another on the question settings page:



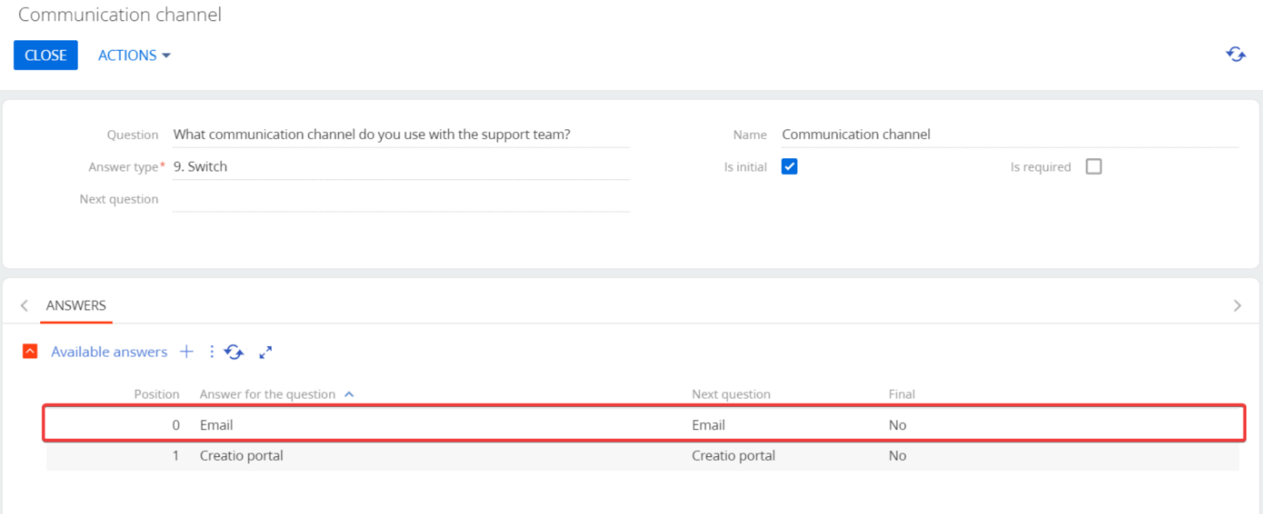
Note. If the transition to the next question is not clearly indicated for the answer option, the transition will be made in accordance with the order of the question itself. But the user can indicate the transition to the question based on the answers in the questionnaire.

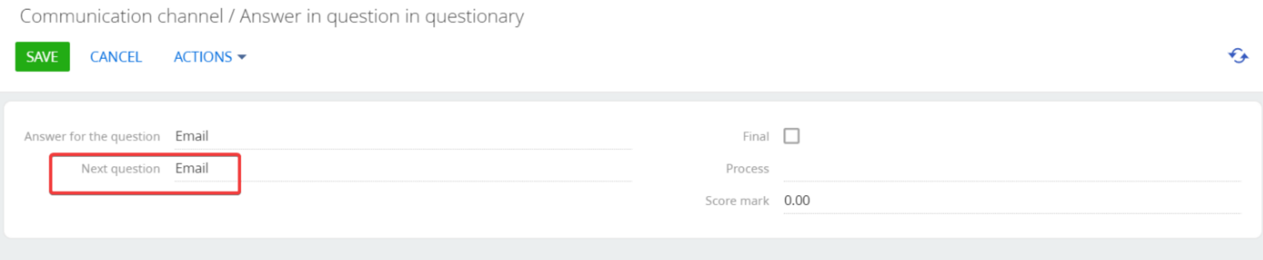
An example of transition to a questions depending on the answer:

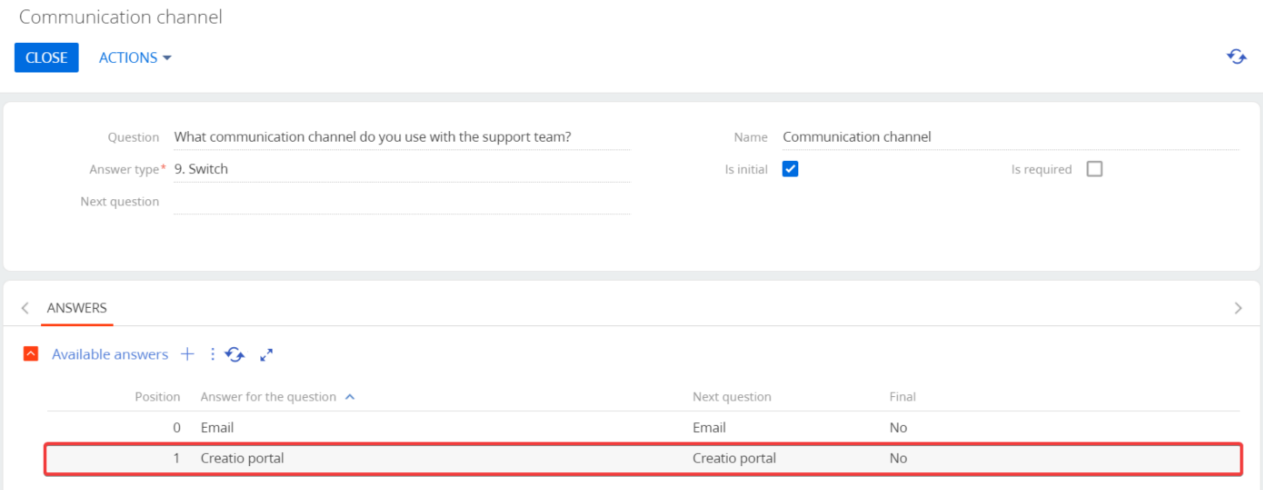
The first question in the questionnaire will be "Which channel for communication with the support service do you use?" with the answer options "Email" and "Creatio Portal". Depending on the user's answer, it is necessary to adjust the transition to the question, is it convenient to use this channel?

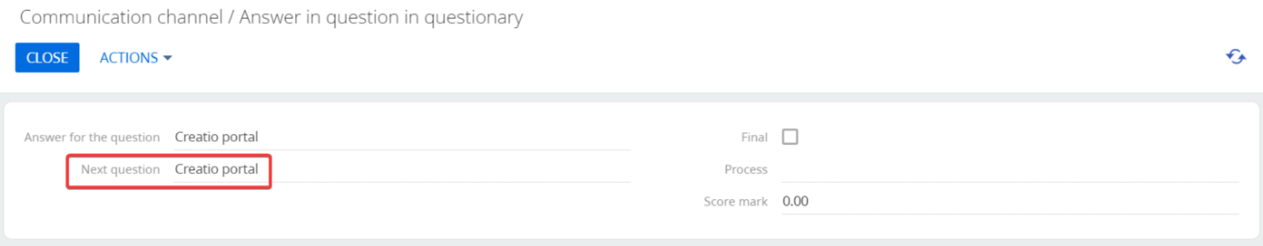


For this, it is necessary to specify the question to which the user will go after the answer in the answer setting:





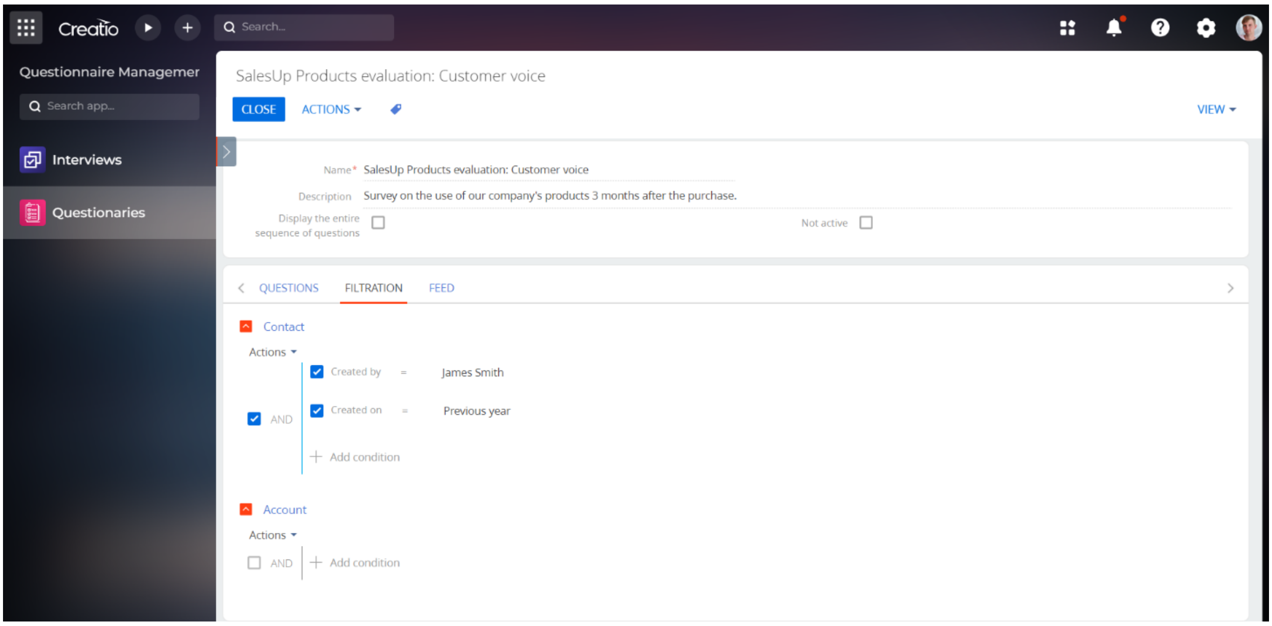




Questionaries filtration

The user can filter the configured questionnaire by account or by contact.

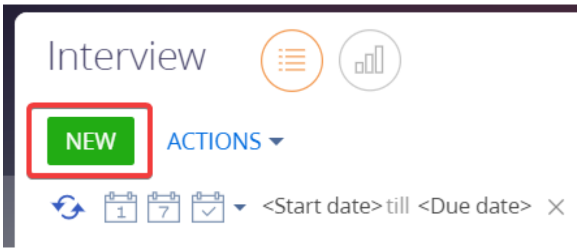
If you need to make the questionnaire available to a specific account or contact, go to the "Filtering" tab of the questionnaire settings page and, using the advanced filter, specify the parameters by which the questionnaire should be filtered for the contact, account, or contact and account.



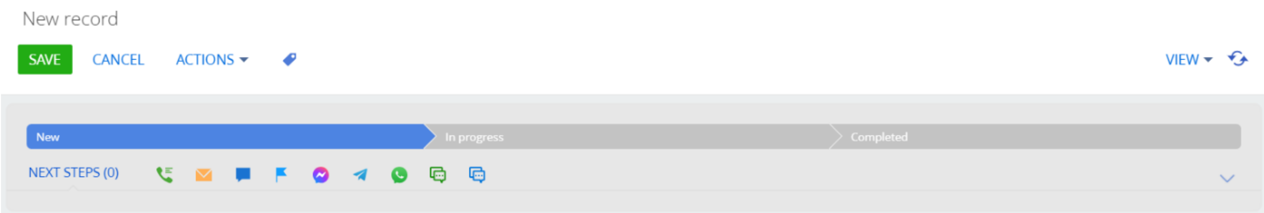
By default, if the contact/account filter is not configured, the questionnaires will be displayed for everyone.

Interview setup

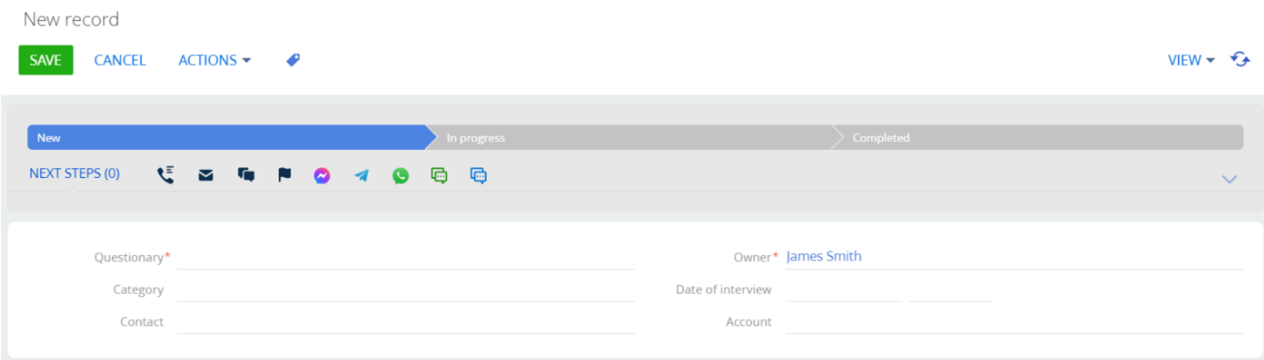
To set up an interview, go to the "Interview" section and click the "NEW" button



On the new interview page, the DCM panel with interview statuses is displayed to the user:

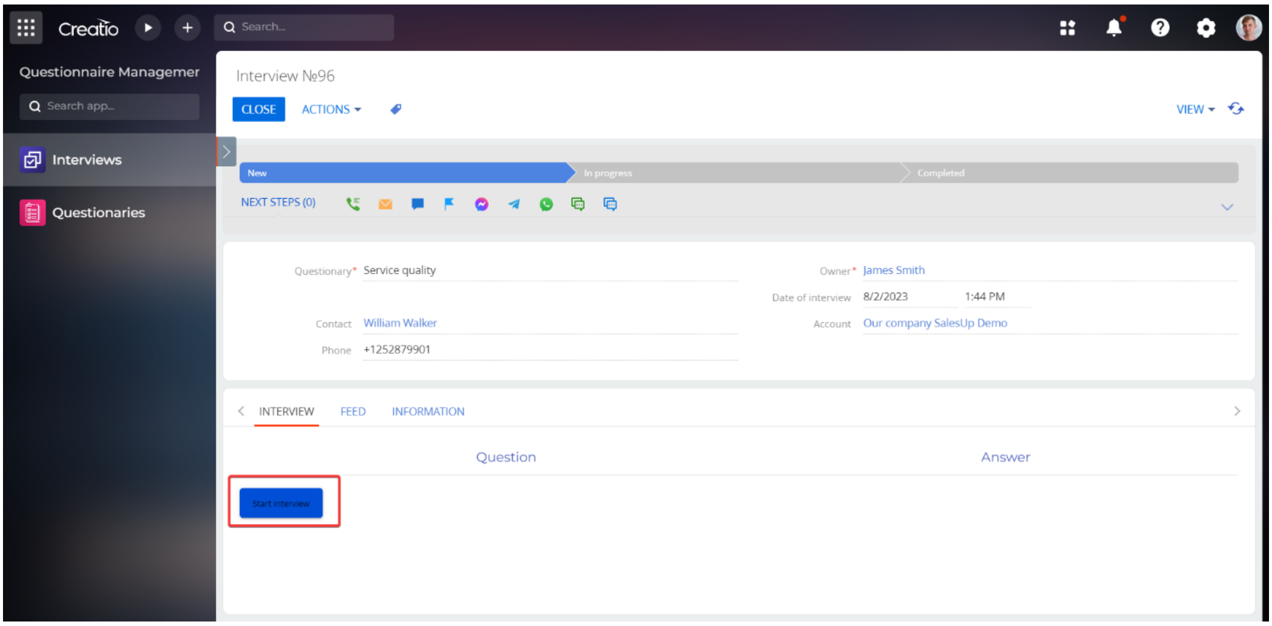


Mandatory and additional fields must be filled in for a new interview:

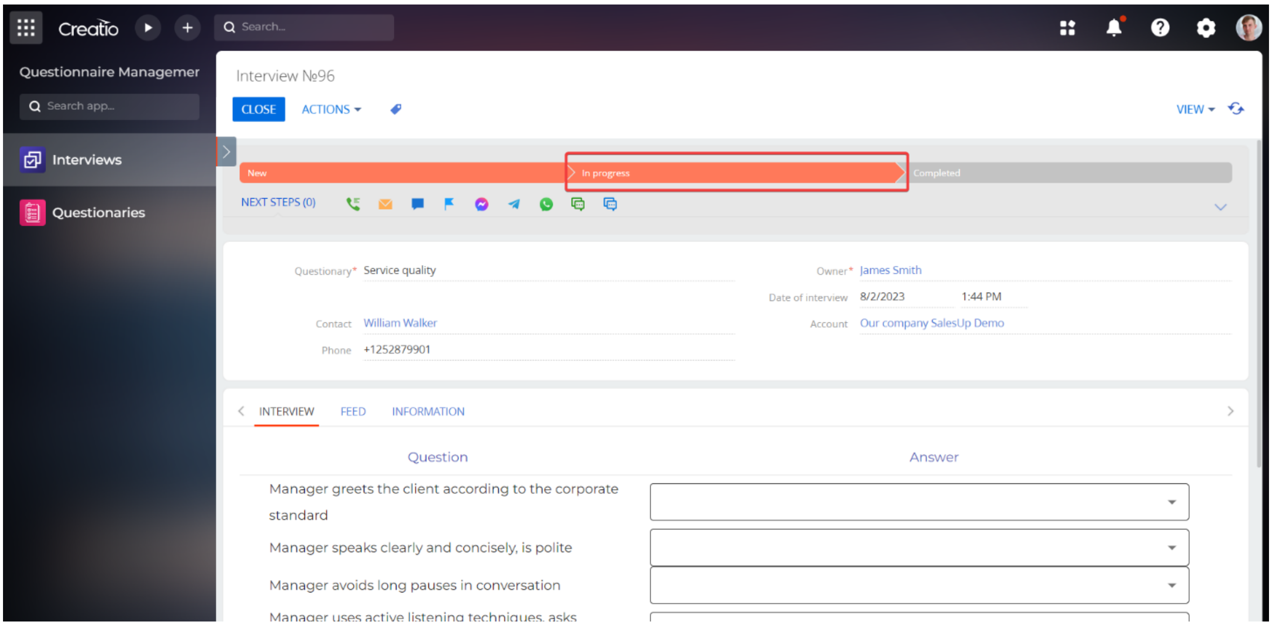


- "Questionnaire" - choose the questionnaire whose template will be used in the interview. All active questionnaires are available for selection.
- "Contact" - select the contact for which the interview is being configured.
- "Category" - if necessary, specify the category of the survey. For example, "Knowledge assessment", "Customer survey", "Event invitation". You can add the values you need to select in the "Survey Categories" directory.
- "Owner" - filled automatically with the value of the contact who created the interview. If necessary, the person responsible can be changed.
- "Date of interview" - specify the date of the interview.
- "Account" - filled automatically with the value of the account depending on the selected contact.

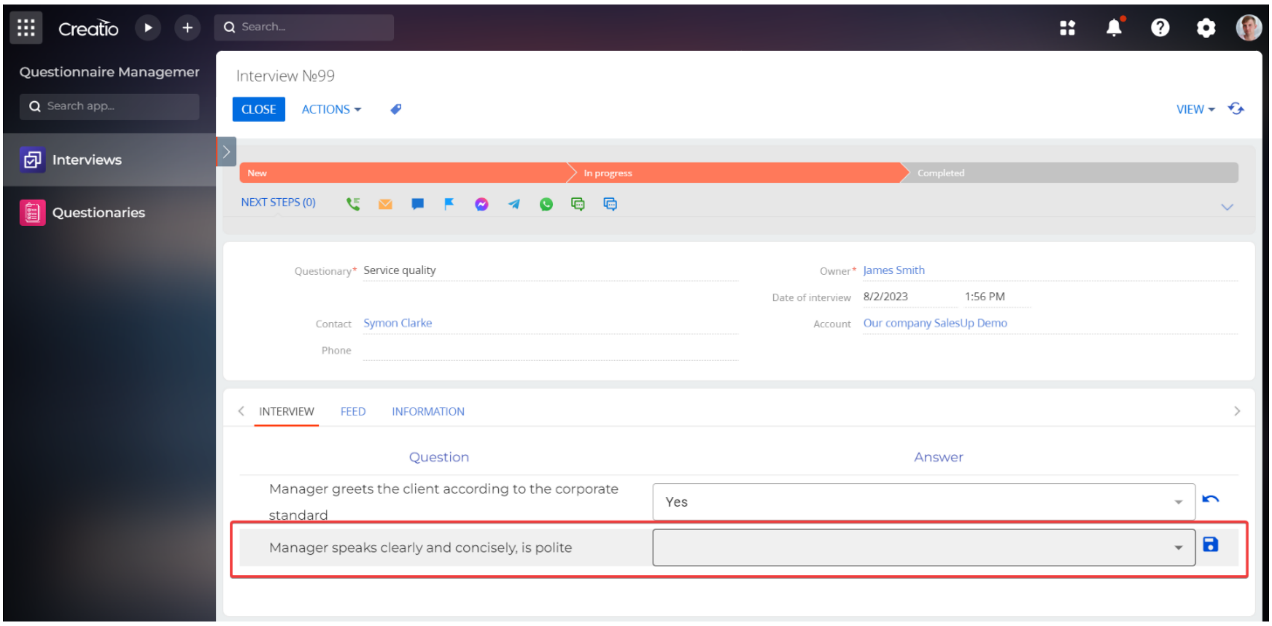
After saving the entered data, the "Start interview" button appears on the "Interview" tab:



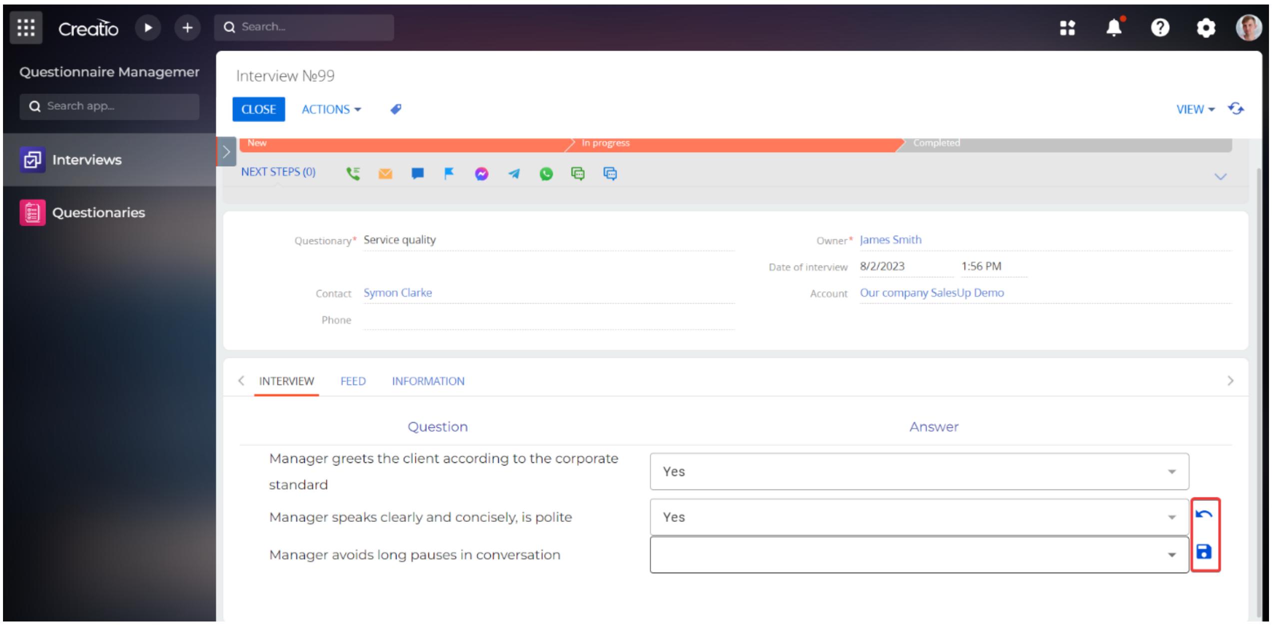
After clicking the button, the interview status automatically changes to "In progress" and the questions configured in the "Interviews" section for the questionnaire selected in the current interview are displayed on the "Interview" tab.



Note. If the "Display the entire sequence of questions" check box is active in the questionnaire settings, all questions of the questionnaire will be displayed to the user. Otherwise, the next questionnaire question will be displayed after saving the answer to the current question.

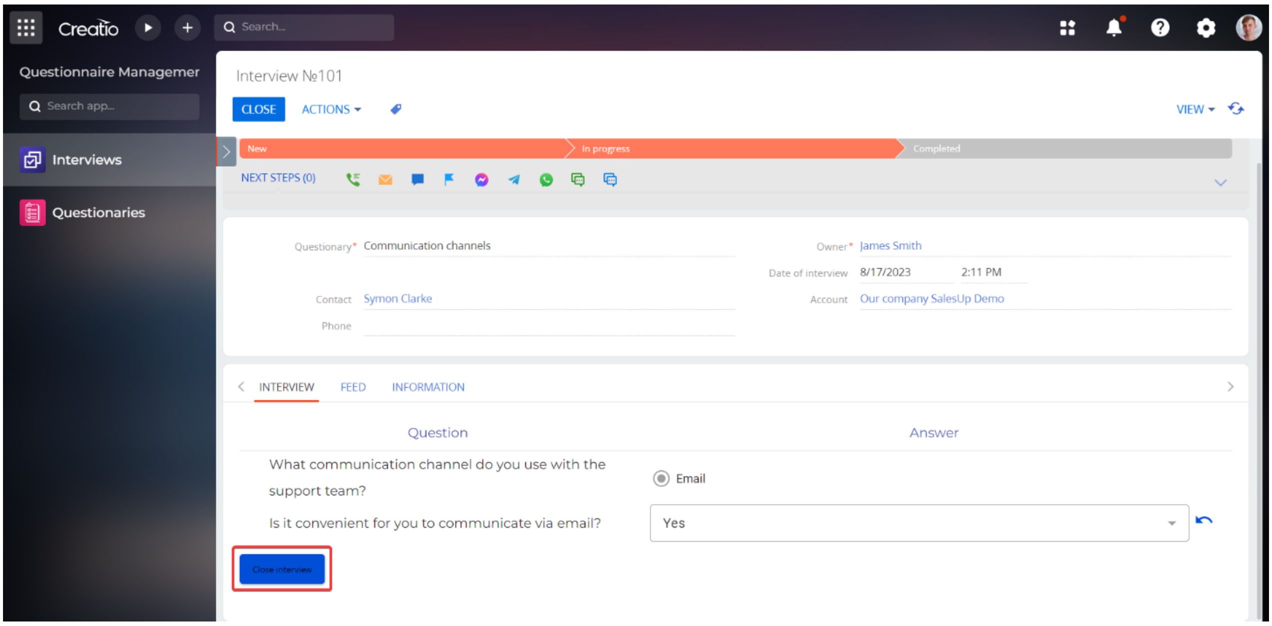


In the case of setting up a questionnaire with a customized display of questions without the entire sequence, the user can change the answer to the previous question, but only until the moment of saving the answer to the current question:

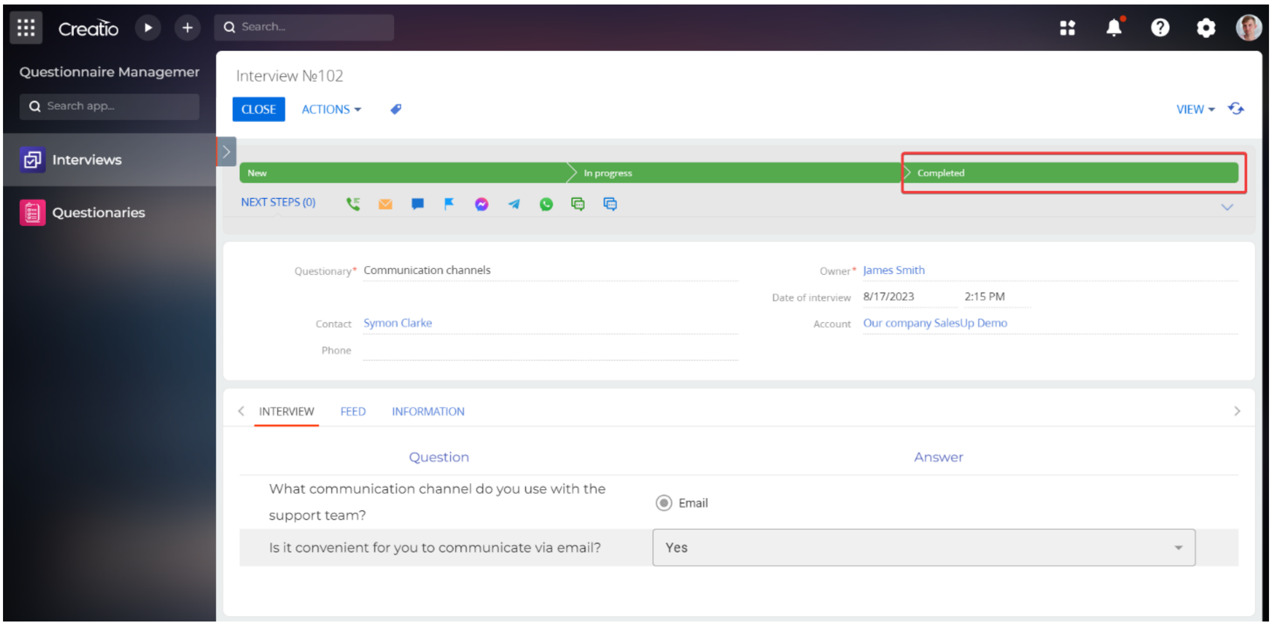


To change the answer to the previous question, press . Press to save the answer.

After answering the last question in the questionnaire, the "Finish the interview" button becomes available to the user.

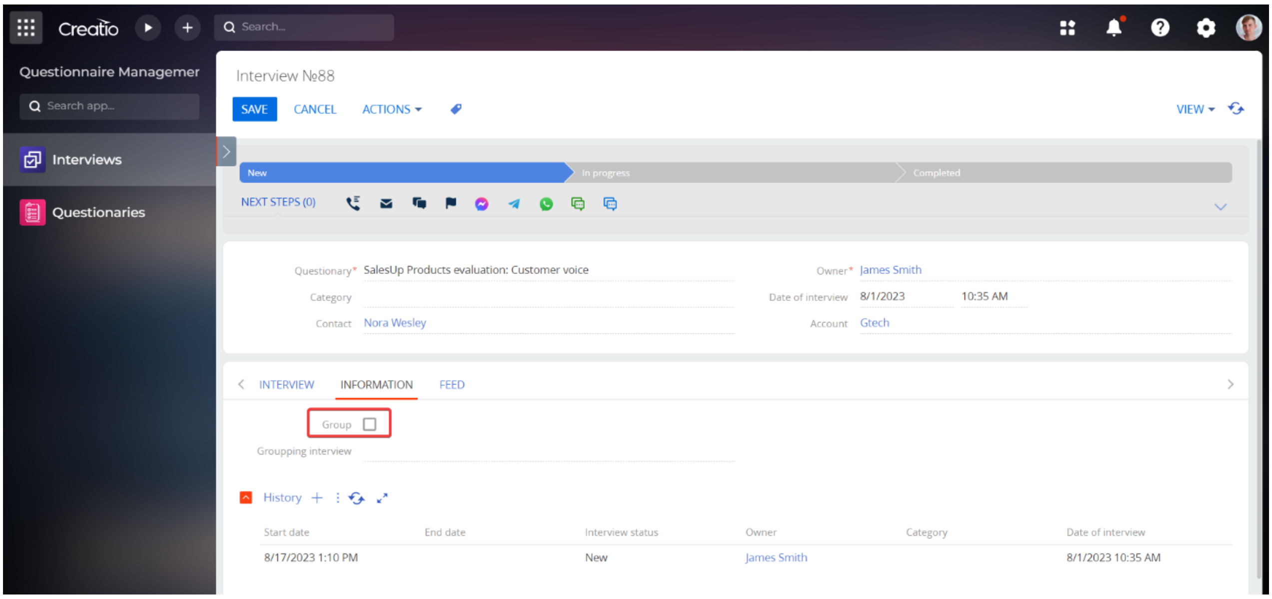


By pressing the button, the user completes the interview on this questionnaire, the status of the interview automatically changes to "Completed", and the data fields and entered answers become unavailable for editing.

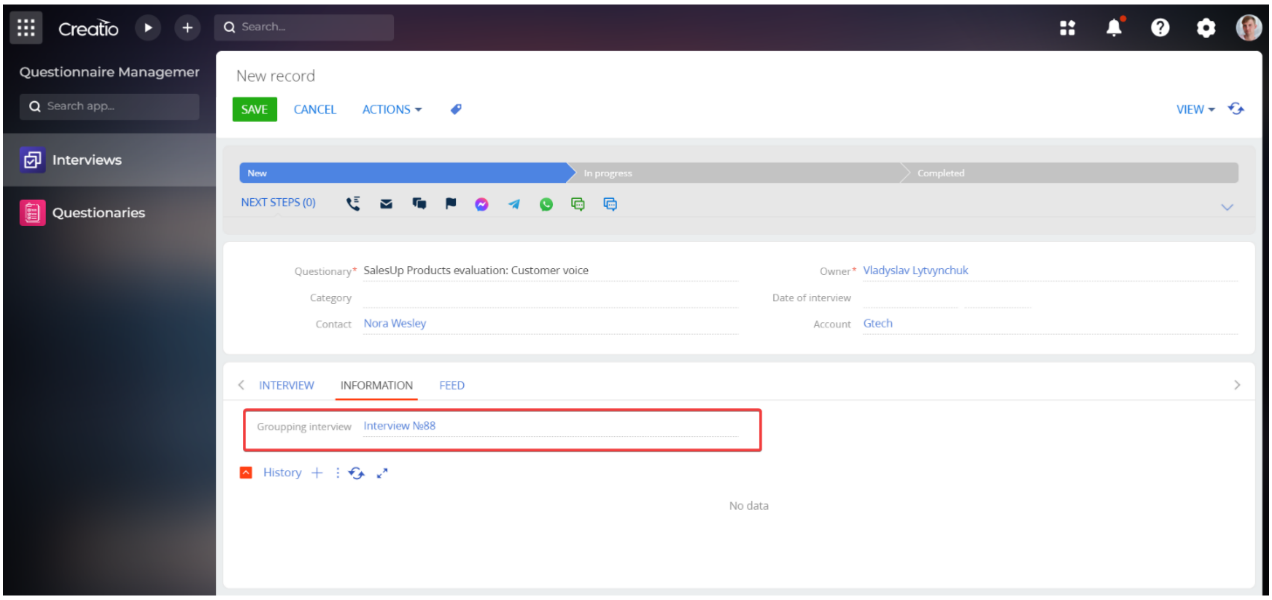


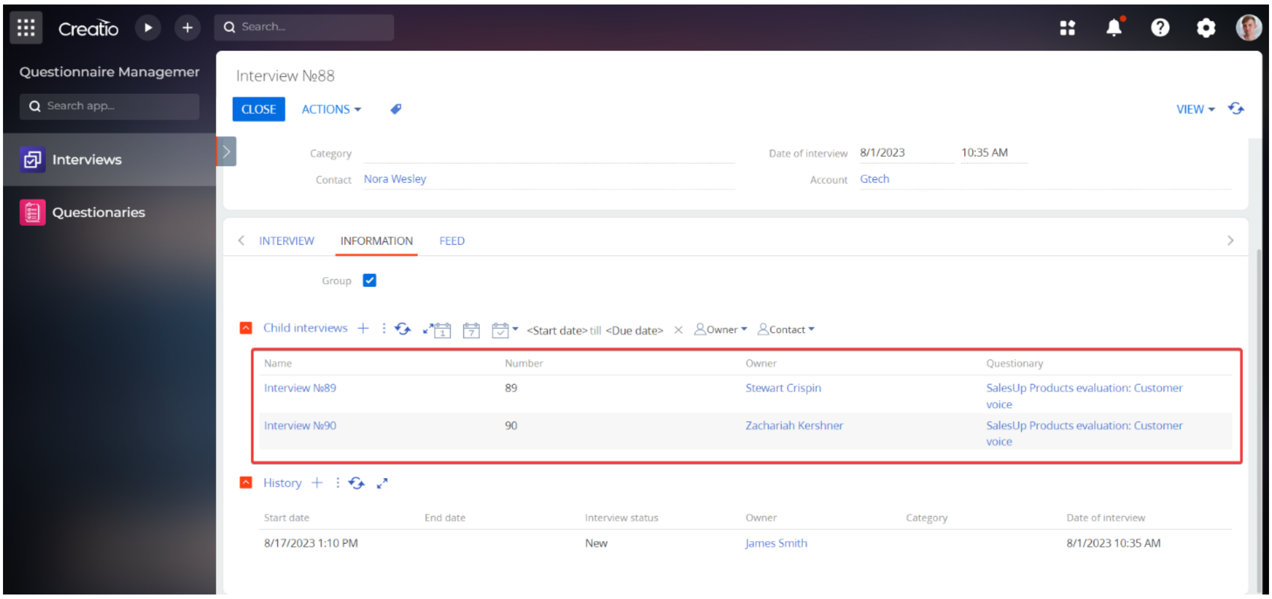
Grouping interview setup

To set up a group interview, go to the “Information” tab of the interview page.



After activating the "Group" checkbox, the user becomes available to the "Child interview" detail, where the user adds an interview that will be grouped with the current one, and the connection will be automatically put in the "Grouping interview" field

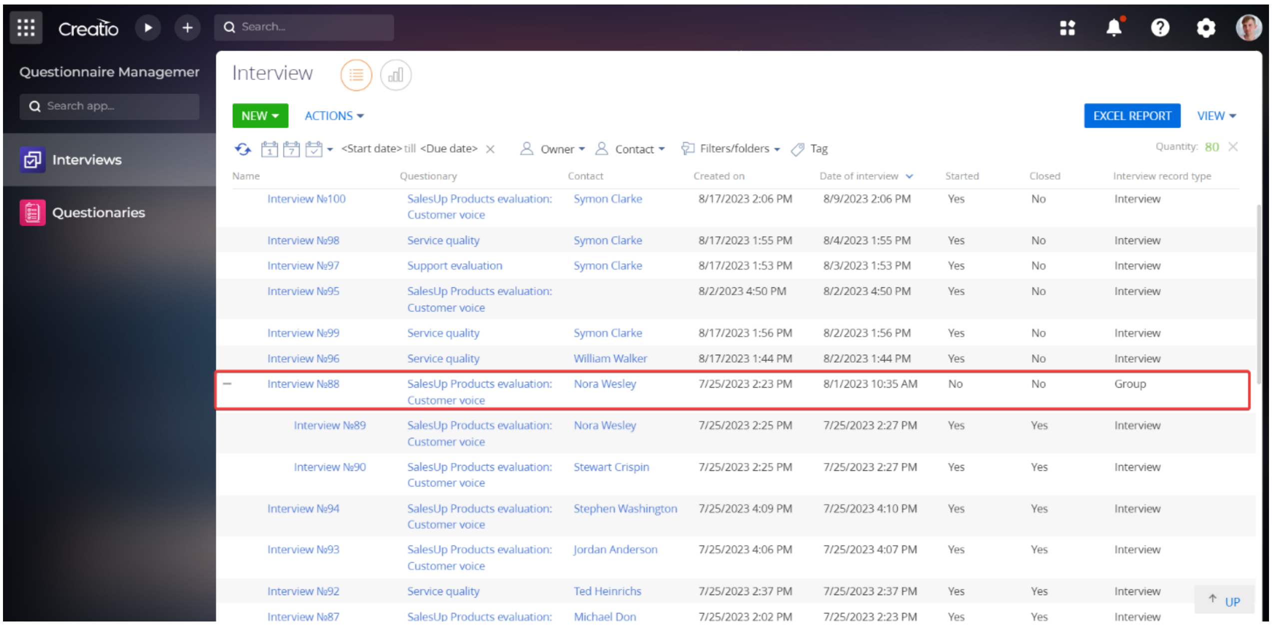




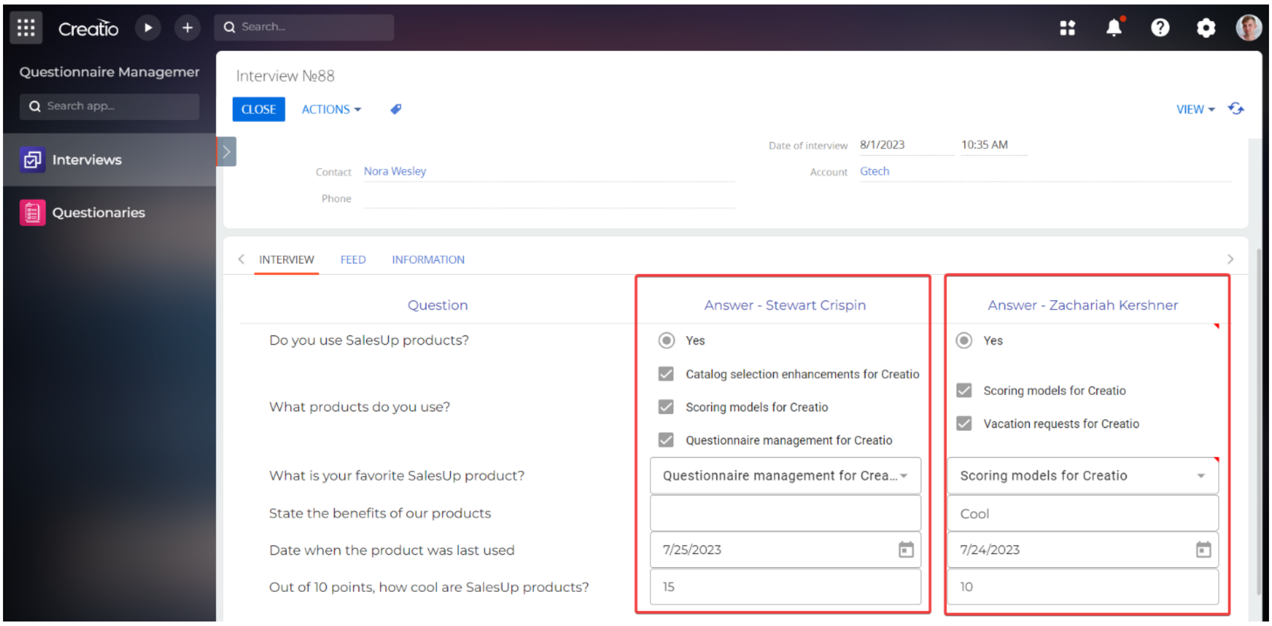
Viewing the results of the interview

After the interview is completed, the answers to the questionnaire will be available for viewing in the "Interview" section.

To compare the answers to a group interview, in the register of the "Interview" section, go to the record of the "Interview" section with the type "Group"



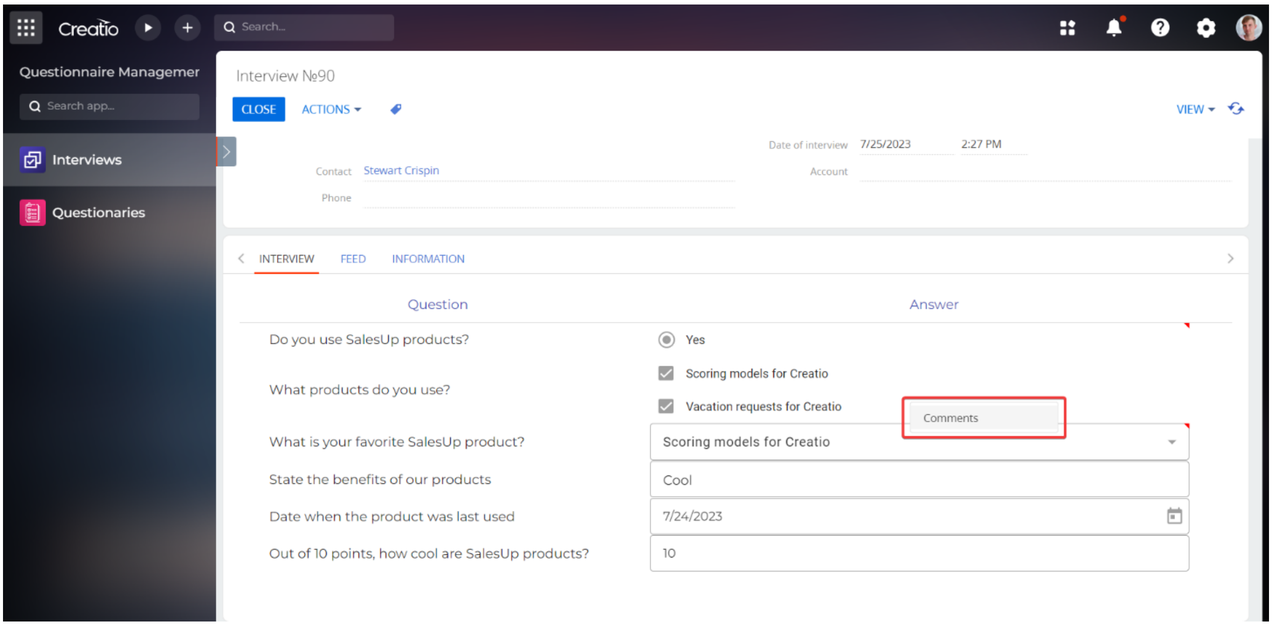
Answers to questions will be displayed on all polls included in the group.



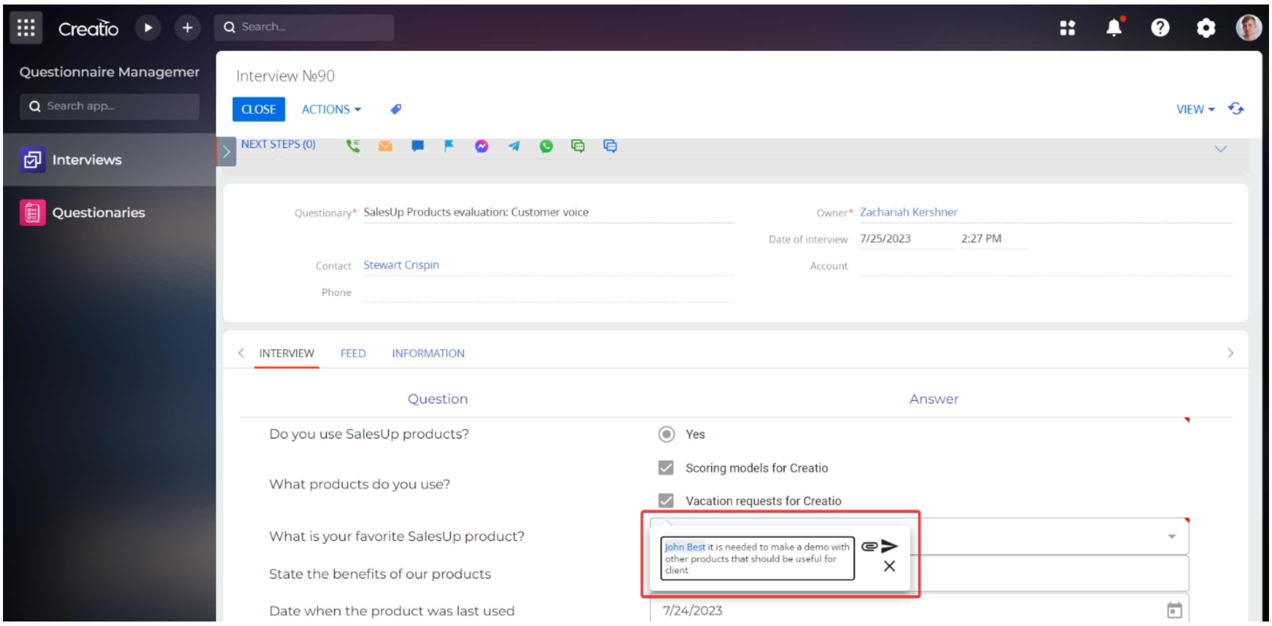
Interview answers commenting

After completing the interview, the user can leave a comment on the answer in the interview.

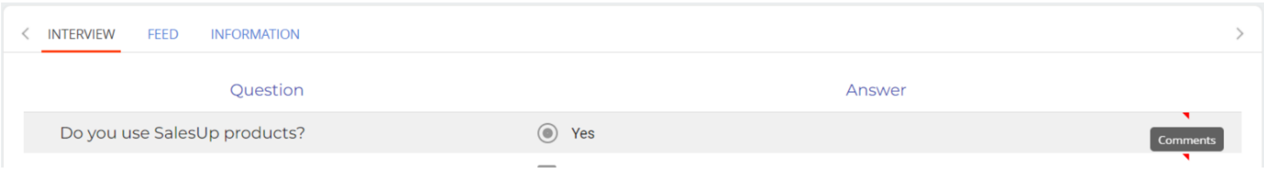
To do this, you need to right-click on the answers in the interview and select the "Comments" menu item



The user can add text, files, mark in the comments of system users:



If a comment is added to the answer, then a red triangle with a hint about the comment will be displayed in the interview on the answer on which the comment was added.

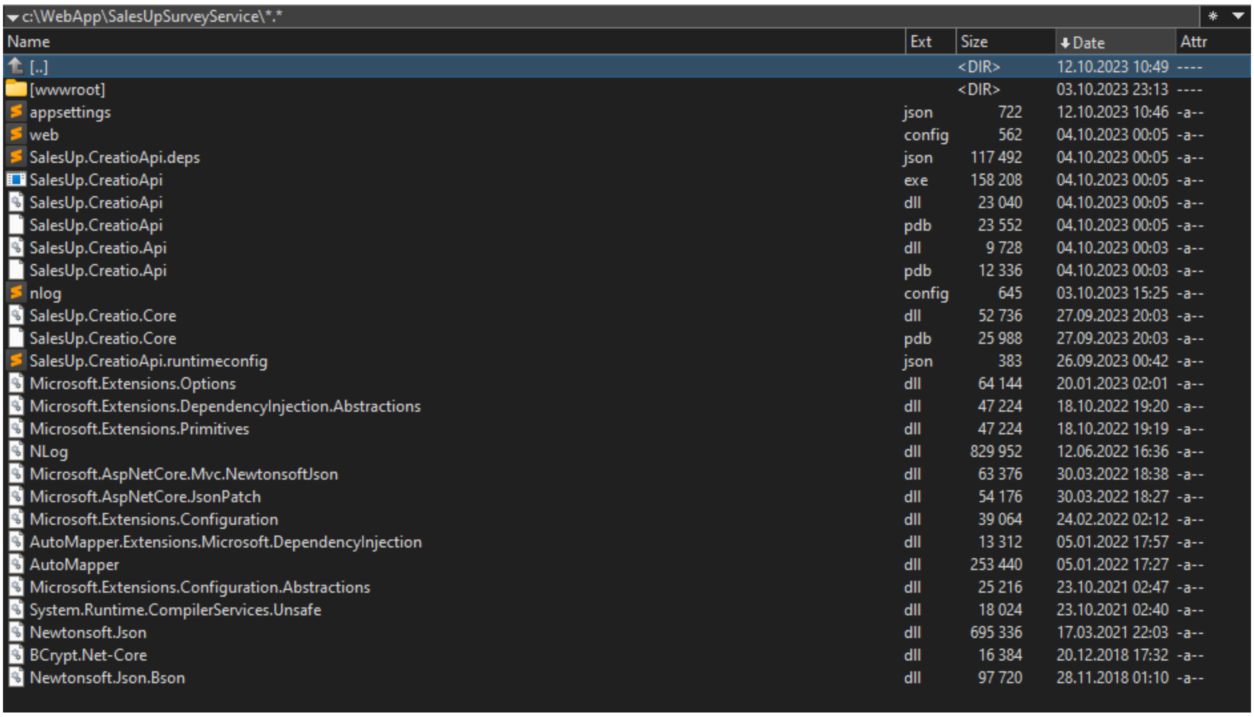


Setting up an external service to conduct surveys outside of Creatio

To set up an on-site external survey service (on your own servers), you need to have a Windows server from which you can access Creatio.

To launch a survey service, you need to:

1. Download the service files at the link: https://support.salesup-it.com/0/ServiceModel/SuBoxesFileService.svc/QuestionnaireManagement/ExternalServiceFiles
2. Unzip the archive to a directory on the server, for example C:\WebApp\SalesUpSurveyService.



c:\WebApp\SalesUpSurveyService*.*

Name	Ext	Size	Date	Attr
[..]		<DIR>	12.10.2023 10:49	----
[wwwroot]		<DIR>	03.10.2023 23:13	----
appsettings	json	722	12.10.2023 10:46	-a--
web	config	562	04.10.2023 00:05	-a--
SalesUp.CreatioApi.deps	json	117 492	04.10.2023 00:05	-a--
SalesUp.CreatioApi	exe	158 208	04.10.2023 00:05	-a--
SalesUp.CreatioApi	dll	23 040	04.10.2023 00:05	-a--
SalesUp.CreatioApi	pdb	23 552	04.10.2023 00:05	-a--
SalesUp.Creatio.Api	dll	9 728	04.10.2023 00:03	-a--
SalesUp.Creatio.Api	pdb	12 336	04.10.2023 00:03	-a--
nlog	config	645	03.10.2023 15:25	-a--
SalesUp.Creatio.Core	dll	52 736	27.09.2023 20:03	-a--
SalesUp.Creatio.Core	pdb	25 988	27.09.2023 20:03	-a--
SalesUp.CreatioApi.runtimeconfig	json	383	26.09.2023 00:42	-a--
Microsoft.Extensions.Options	dll	64 144	20.01.2023 02:01	-a--
Microsoft.Extensions.DependencyInjection.Abstractions	dll	47 224	18.10.2022 19:20	-a--
Microsoft.Extensions.Primitives	dll	47 224	18.10.2022 19:19	-a--
NLog	dll	829 952	12.06.2022 16:36	-a--
Microsoft.AspNetCore.Mvc.NewtonsoftJson	dll	63 376	30.03.2022 18:38	-a--
Microsoft.AspNetCore.JsonPatch	dll	54 176	30.03.2022 18:27	-a--
Microsoft.Extensions.Configuration	dll	39 064	24.02.2022 02:12	-a--
AutoMapper.Extensions.Microsoft.DependencyInjection	dll	13 312	05.01.2022 17:57	-a--
AutoMapper	dll	253 440	05.01.2022 17:27	-a--
Microsoft.Extensions.Configuration.Abstractions	dll	25 216	23.10.2021 02:47	-a--
System.Runtime.CompilerServices.Unsafe	dll	18 024	23.10.2021 02:40	-a--
Newtonsoft.Json	dll	695 336	17.03.2021 22:03	-a--
BCrypt.Net-Core	dll	16 384	20.12.2018 17:32	-a--
Newtonsoft.Json.Bson	dll	97 720	28.11.2018 01:10	-a--

3. Configure access to the Creatio system in the appsettings.json file:
    a. The website address where the service has access to the system.
    b. Access credentials to the Creatio system via OAuth 2.0
        i. Authorization service address
        ii. Client id
        iii. Client secret

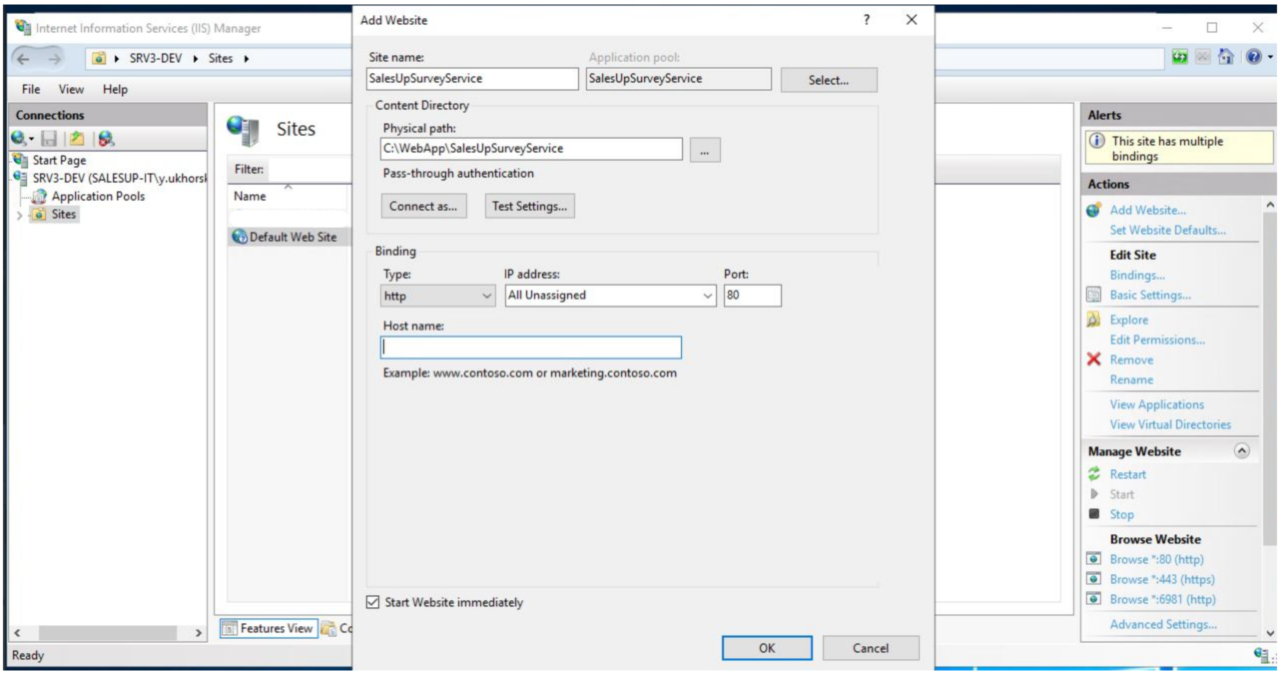
You can find the authorization service address in the OAuth20IdentityServerUrl system setting.

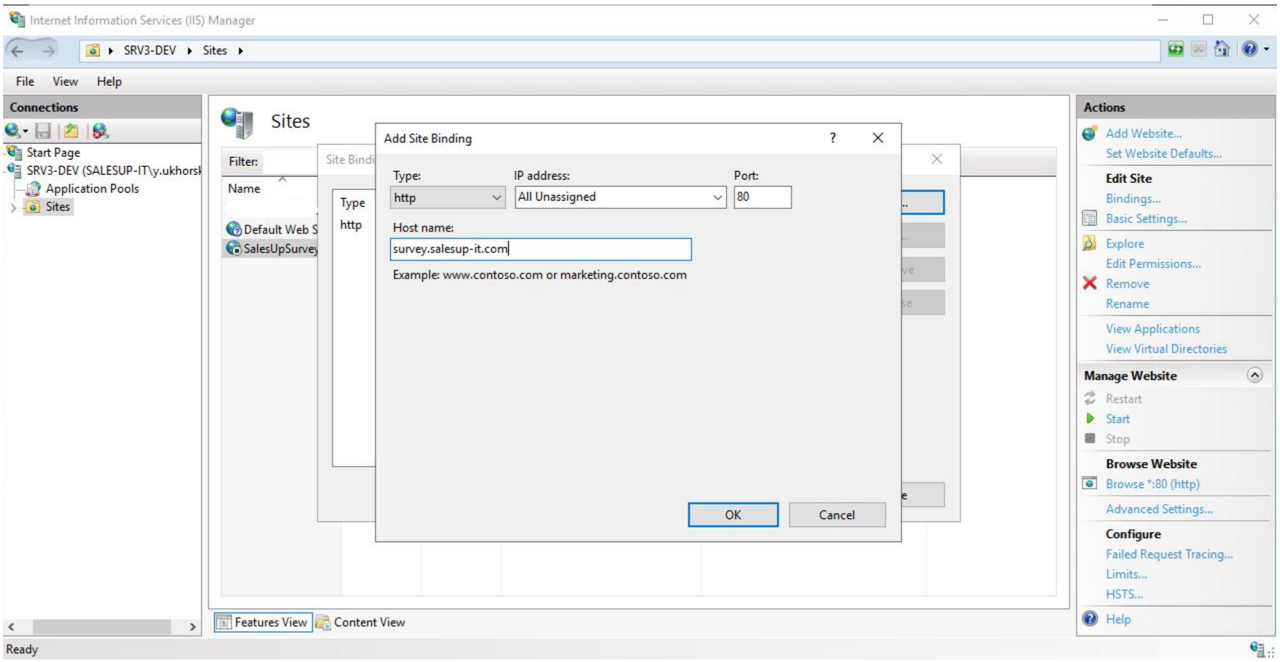
How to configure access for an external survey service via OAuth 2.0 (to get Client id and Client secret): https://academy.creatio.com/documents?id=2467

Important: The user under whom access to the system is executed must have full access to all surveys and questionnaires created in the system, as well as the right to create new surveys.

```json
{
  "Logging": {
    "LogLevel": {
      "Default": "Information",
      "Microsoft": "Warning",
      "Microsoft.Hosting.Lifetime": "Information"
    }
  },
  "CreatioApp": {
    "AppUrl": "https://140974-crm-bundle.creatio.com",
    "OAuthCredentials": {
      "IdentityServiceUrl": "https://140974-crm-bundle-is.creatio.com",
      "ClientId": "3E1[redacted]2A",
      "ClientSecret": "DF63[redacted]9B8"
    },
    "Data": {
      "Allowed": false
    },
    "Rest": {
      "AllowedServices": [
        "SumInterviewService"
      ]
    },
    "ServiceModel": {
      "AllowedServices": [
      ]
    },
    "CustomHeaders": [],
    "GeneralClientCustomHeaders": [
      {
        "Key": "Su-Is-Interview-Service",
        "Value": "true"
      }
    ]
  },
  "AllowedHosts": "*"
}
```

4. In the IIS Service Manager, configure the site
    a. Enable IIS Service Manager (if not already done)
    b. Install .NET 7.0 (if not already installed)
    c. Create a new site and configure it to the directory where the archive was unpacked
    d. Register the site name in the domain settings
    e. Assign a domain name binding to the site

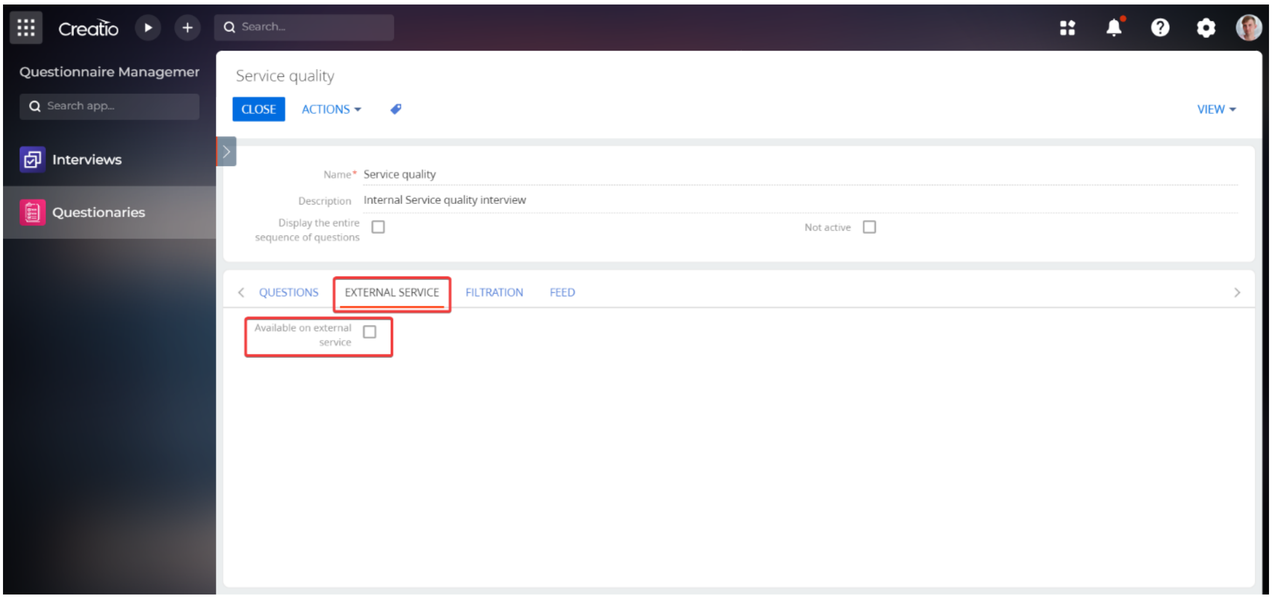




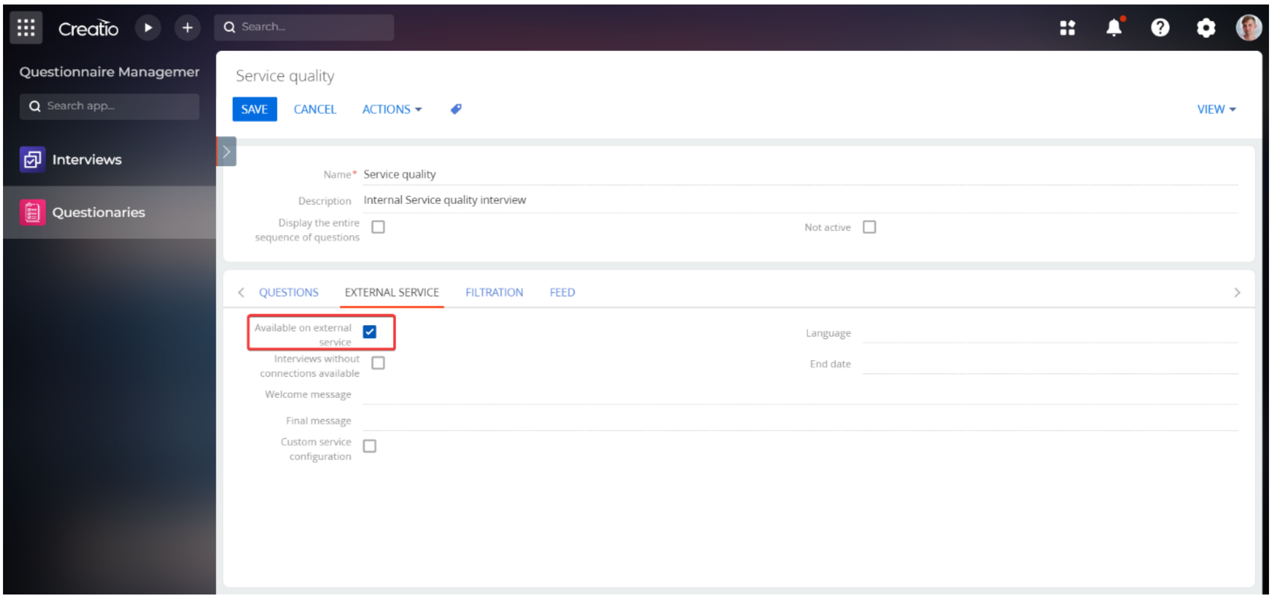
Setting up external surveys

Note. To use the possibility of conducting surveys outside of Creatio (on an external service), a separate site must be deployed, a link to which will be generated and sent to non-system users manually or automatically from the business process.

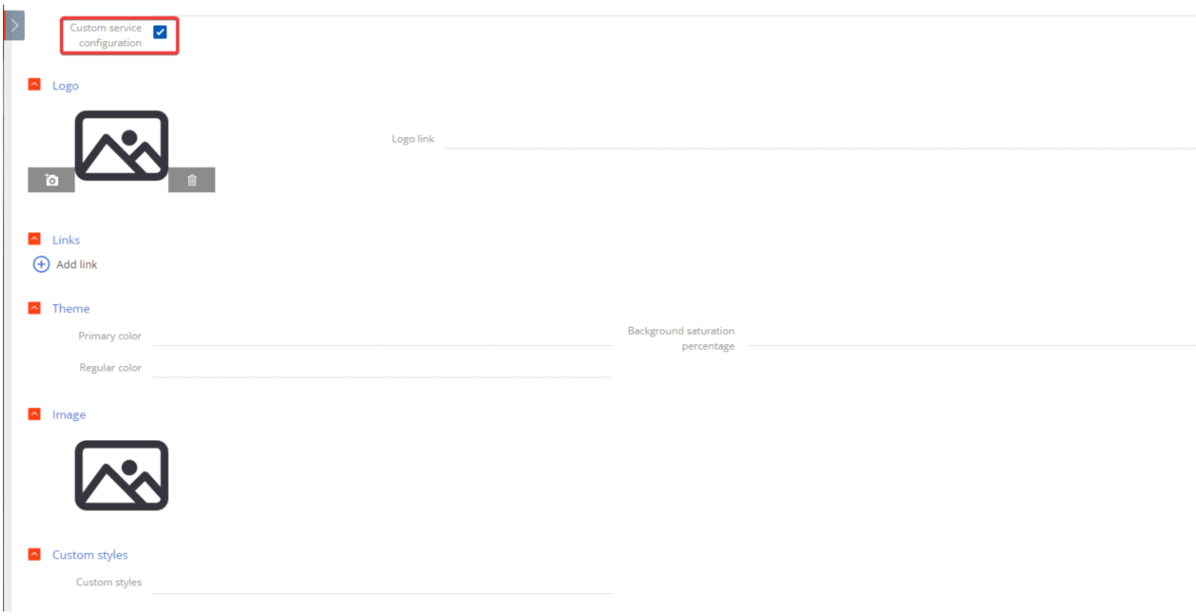
To set up an external survey, go to the questionnaire for which external users are to take the survey and activate the "Available on external service" checkbox on the "External service" tab:



After activating the "Available on external service" checkbox, the user has access to advanced settings:

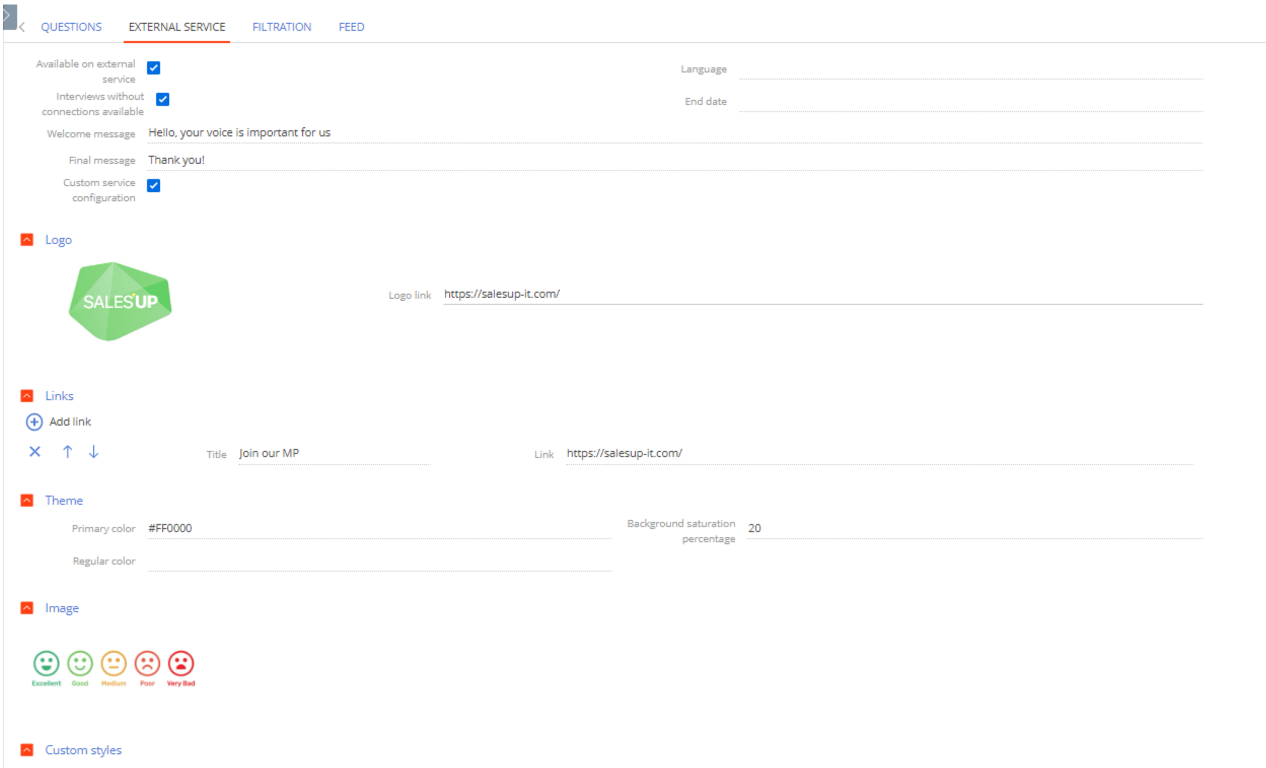


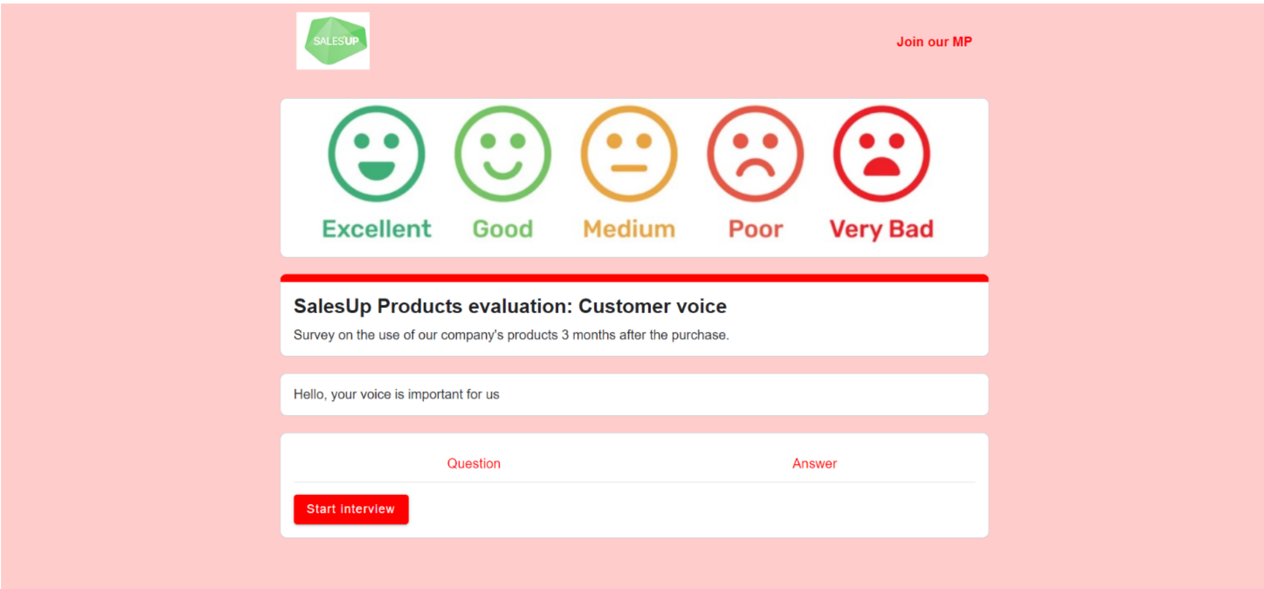
- Language – all active languages on the site are available for selection. By default, constant values (for example, "Question", "Answer") are displayed in English, but the value specified in the "Language" field allows you to translate these constant values into the specified language.
- End date – the field indicates the date until which the questionnaire will be available for completion on the external service.
- Welcome message – the field contains the text of the message that will be displayed to the respondent before taking the survey.
- Final message – the field specifies the text of the message that will be displayed to the respondent after completing the survey and answering all the questions.
- Custom service configuration – after activating the checkbox, the user has access to advanced customization of the questionnaire view on an external service



- Logo – specify the image that will be displayed in the survey on the external service. For example, it can be the logo of the company conducting the survey.
- Logo link – specifies the link to which the respondent will be directed after clicking on the logo image.
- Links – if necessary, specify a link that will be displayed as a button on the external survey questionnaire. Multiple buttons can be customized.
- Primary color – specify the hex code of the background color (for example, #FF0000 - red). By default, the primary color is blue.
- Regular color – specifies the hex code of the text color (for example, #0000FF - blue).
- Background saturation percentage – f necessary, specify the percentage of background saturation of the questionnaire on the external service.
- Image – specify the image that will be displayed in the block above the list of questions in the questionnaire. For example, it can be a poster of a webinar for a survey that is conducted to identify those interested in participating.
- Custom styles – advanced customization of the questionnaire appearance using code.

Example of set up:

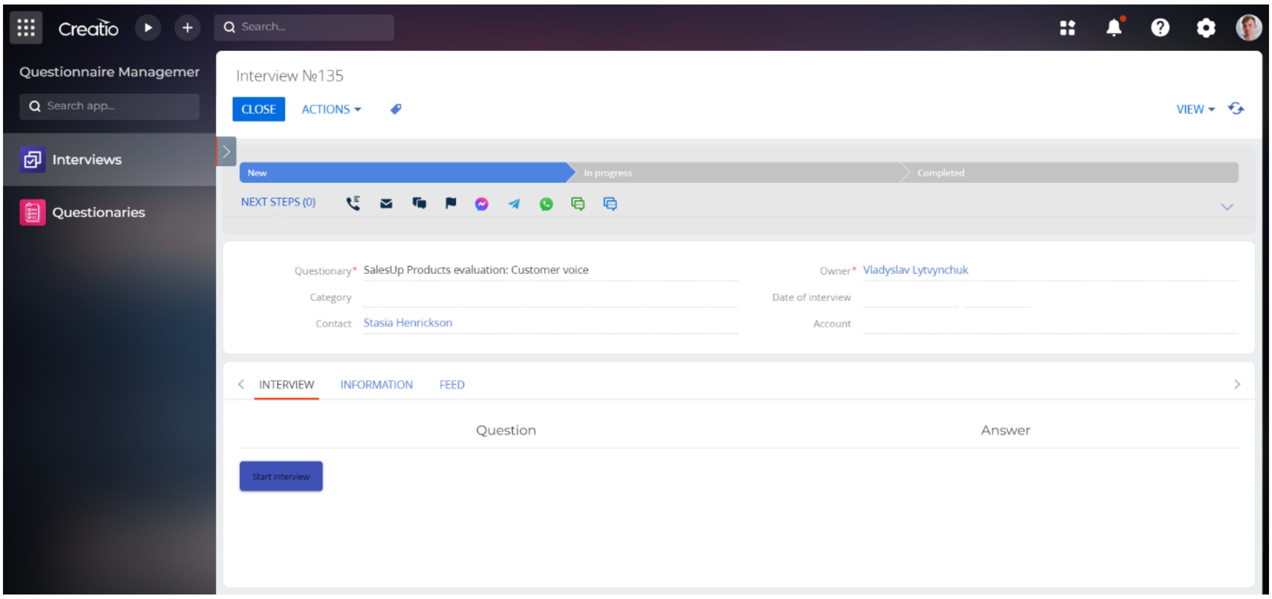




For an external user to complete a survey, you need to create a link to a personalized or general survey.

To do this, you need to create a link in the address field on the external service.

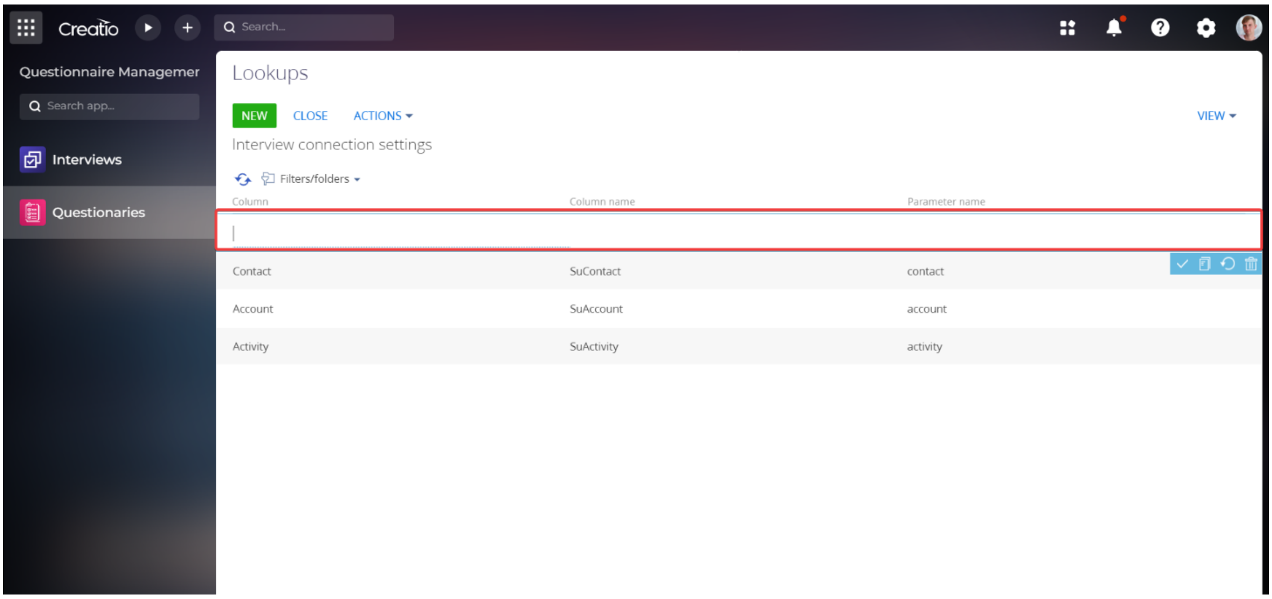
1. Create a link to a survey already created in the system for a specific contact to be completed on an external service.



The external service must be specified:

- The address of the external service. For example, "https://survey-site.com";
- The character "/" and the character "?";
- "interview=";
- ID of the created interview;

Note: You can copy the survey ID in the address bar of the corresponding page.



Example of link: https://survey-site.com/? interview=0e857629-0859-432d-a08d-f0b6ead69efe

The answers provided in the external service will be added to the interview page in Creatio. Even if the respondent did not complete the survey completely and did not click the "Finish" button. When the respondent clicks on the link, the page with the completed answers will be opened.

2. Create a link to a questionnaire with questions for a specific contact, which will automatically create a survey in Creatio.

On the external service, you must specify:

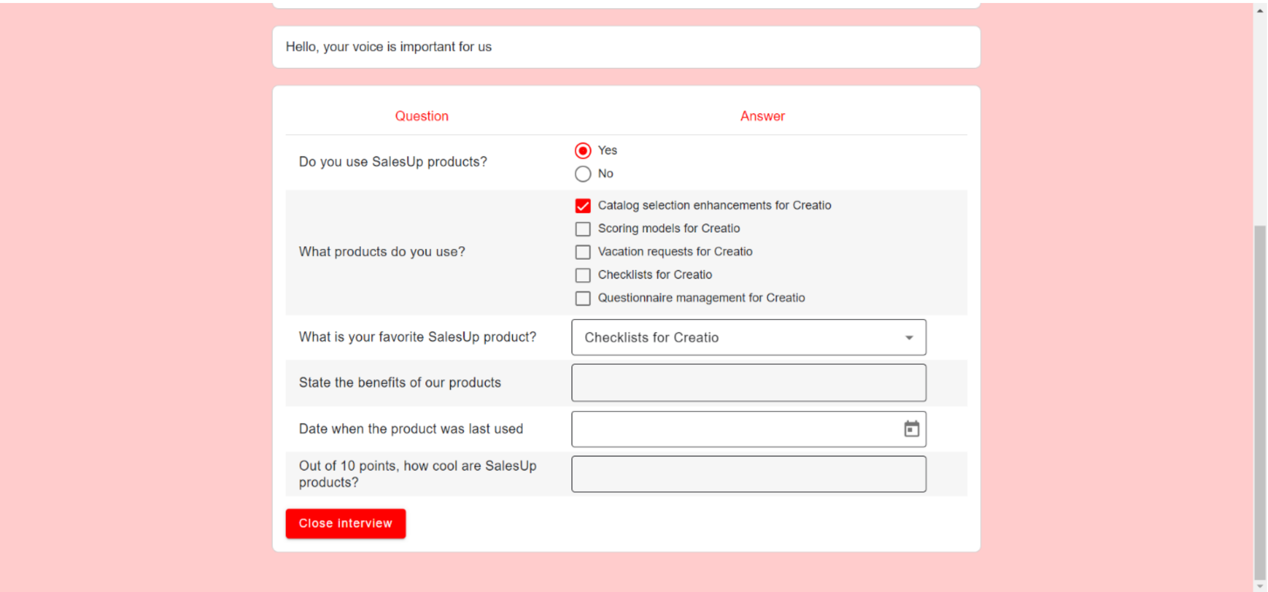
- The address of the external service. For example, "https://survey-site.com";
- The "/" character and the "?" character;
- "questionary=";
- Questionnaire ID on the Creatio website;
- The "&" symbol;
- "contact=" or "account=";
- ID of the contact specified in the survey.

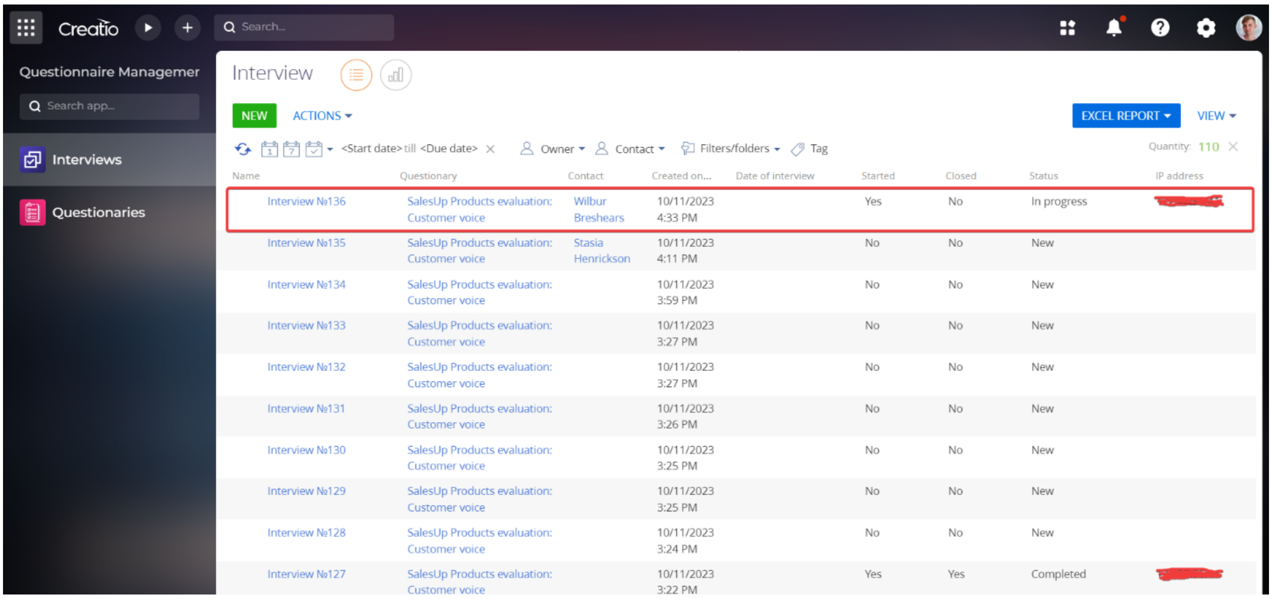
Note: You can copy the ID of the questionnaire and the contact in the address bar of the corresponding page. To automatically send a link, you can set up a macro using the SalesUp Enhanced template macros for Creatio, product, which will insert the link into the message template.

Note: By default, a link is provided to a contact, counterparty, or activity, but if necessary, the desired link can be added in the "Setting up survey links" reference.

Example of link: https://survey-site.com/?questionary=098e7629-0657-982d-a073-f0b67ad69ef7&contact=0e857629-0859-432d-a08d-f0b6ead69efe

After you start taking a survey on an external service, a survey with the specified questionnaire and contact will be automatically created in Creatio.





- Surveys without connections are available – the checkbox is activated if you need to create a link to complete a survey without contacting an account or contact.

For example: a survey for those interested in participating in a webinar.

In this case, the link should be created by specifying:

- The address of the external service. For example, "https://survey-site.com";
- The symbol "/" and the symbol "?";
- "questionary=";
- ID of the questionnaire on the Creatio website;

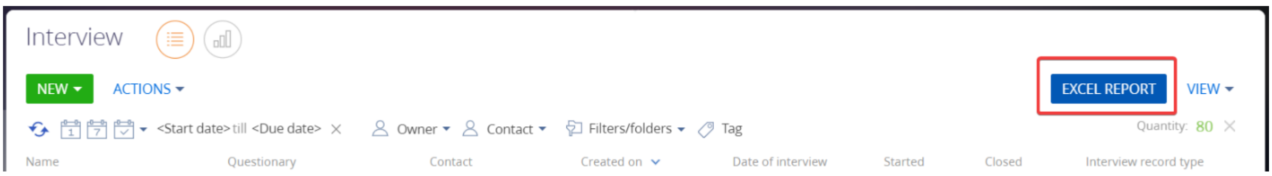
Example of link: https://survey-site.com/?questionary=098e7629-0657-982d-a073-f0b67ad69ef7

After you start taking a survey on an external service, a new survey will be automatically created in Creatio without any links to a contact, counterparty, etc.

Interview export into Excel

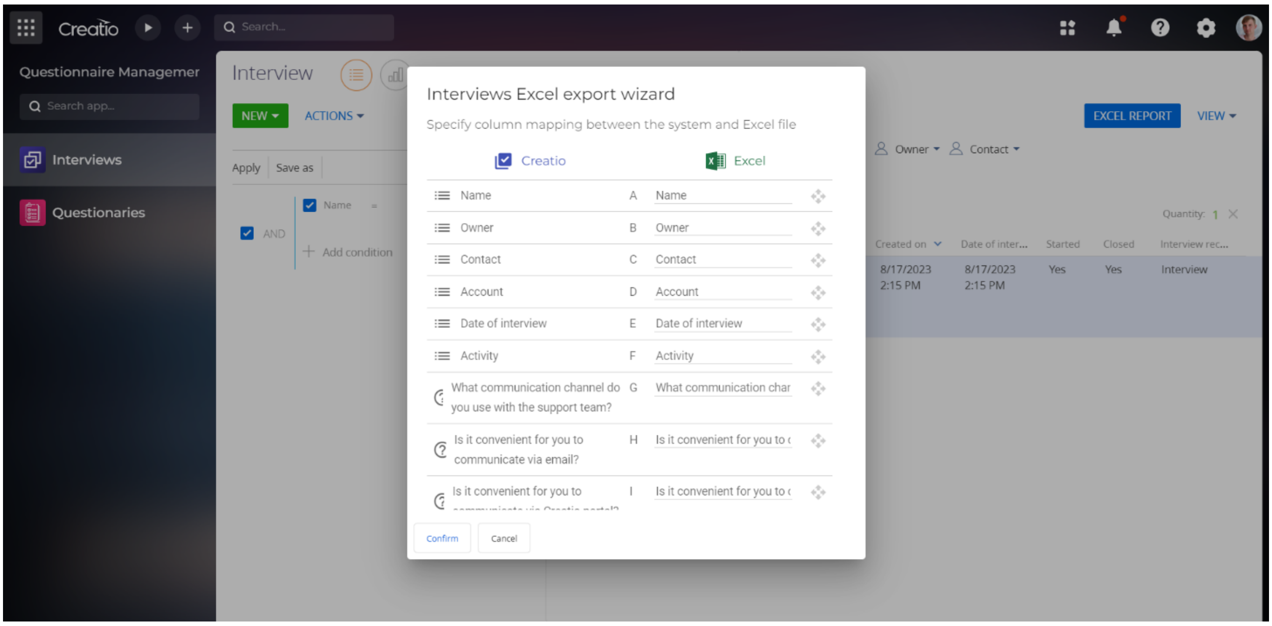
The user can export interviews to an excel file. At the same time, with the help of the Excel export wizard, the user can configure the data mapping between the data in the interview in Creatio and the columns in Excel where this data will be exported.

To configure the export of data to an excel file, click the "Excel Report" button in the upper right part of the register of the "Interview" section



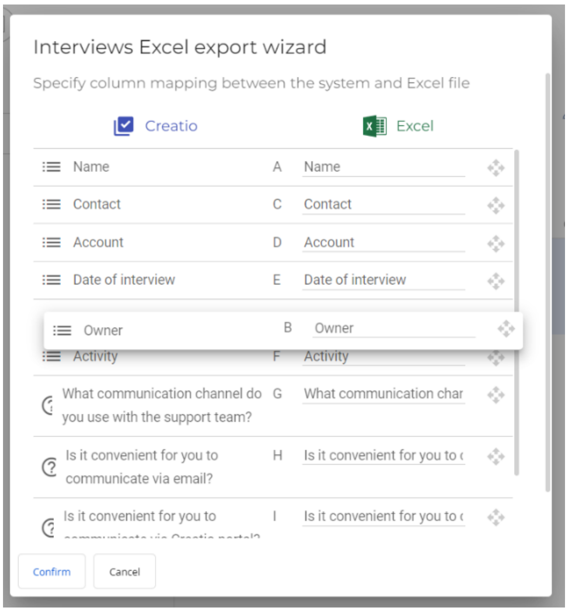
Note. To download interview data into an excel file, the data must be filtered by the questionnaire in the interview, or, for example, by name, account, or contact.

In the export wizard, the interview columns and excel columns are available to the user, into which this data will be downloaded:

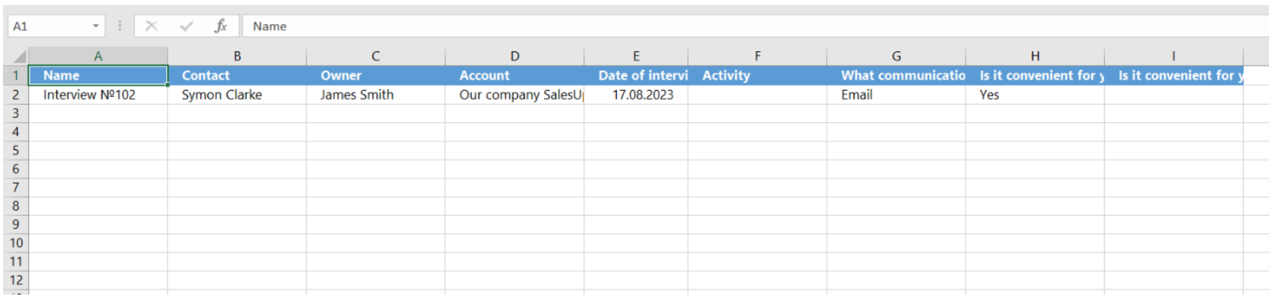


Note. The user can configure the export of the value of any interview column (responsible, contact, account, etc.) as well as objects related to the interview column. For example, the category of the account, or the position of the person in charge).

Additionally, the user can configure which answers from the interview or other information should be exported, the sequence of columns.

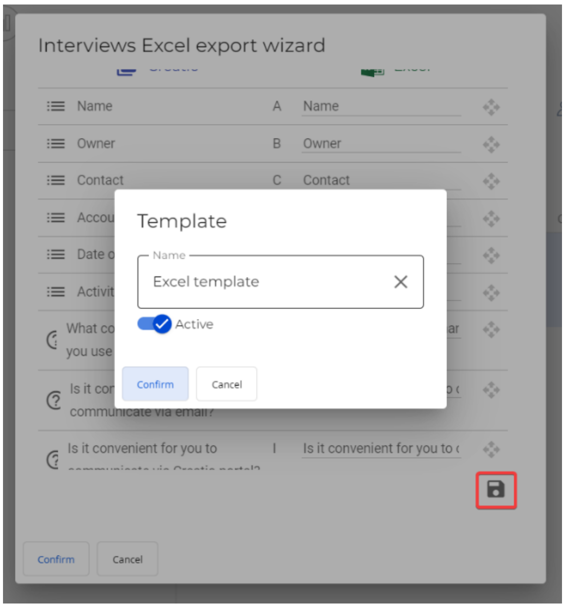


The export file will contain the information that the user configured in the export wizard



Name	Contact	Owner	Account	Date of intervi	Activity	What communicatio	Is it convenient for y	Is it convenient for y
Interview №102	Symon Clarke	James Smith	Our company SalesU	17.08.2023		Email	Yes	

If necessary, the user can save the export settings as a template for future use.



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