

Qstream Salesforce Integration

Complete Client Guide

By Qstream Inc.
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Overview

This document provides an overview of the steps involved in setting up and testing the Qstream integration within Salesforce. There are a number of steps outlined below to complete the integration. If required, the Qstream Project Manager will set up a call with the Qstream technical resource and the client's SFDC Administrator to complete and validate the integration in order to ensure that everything is configured properly prior to launch.

There are three components of the integration to consider. If only the participant and manager screens need to be available, then Component 1 integration is sufficient. If additional synchronization is preferred (i.e. either roster sync to from SFDC to Qstream or data export from Qstream to SFDC) extra steps, outlined in Components 2 and 3, are required.

User Roles and Access

The breakdown below depicts the user roles and level of access for each of these roles.

Qstream Participant

- Receives email notifications from Qstream when questions are available
- Is seamlessly connected to Qstream tab in SFDC via notification emails (SSO)
- Answers questions via Qstream tab in SFDC or Salesforce 1

Qstream Frontline and Senior Manager

- Receives weekly manager emails from Qstream
- Is seamlessly connected to Qstream tab in SFDC via manager emails (SSO)
- Accesses Qstream Manager Dashboard via Qstream tab in SFDC

Qstream Program Manager or Site Admin

- Accesses Qstream Program Manager Reports by logging into Qstream site
- SSO allows seamless log-in to Qstream site

Salesforce.com Administrator

- Responsible for working with Qstream to integrate Qstream and SFDC
- Creates reports and dashboards for SFDC utilizing data exported from Qstream

Component 1: Participant/Manager experience

The following section outlines the steps required to complete the validation. There are a number of key steps and both Qstream and the SFDC Administrator are required to complete the full set.

Step 1: Salesforce Administrator provides key information to Qstream

Step 2: Salesforce Administrator performs setup tasks within Salesforce environment.

Step 3: Qstream completes the setup of the Qstream site

Step 4: Salesforce Administrator and Qstream validate the integration as complete

The next section provides more detail on each of the steps listed above. The FAQ section provides additional information as well.

Step 1: Client provides key information to Qstream

Salesforce Organization ID

Example: 00D1800000015uaXXX.

Salesforce.com Organization ID	00D1a000000Zs5n
Organization Edition	Enterprise Edition
Instance	NA24
Environment Hub Org Id	00DU0000000JVgT :
Modified By	salesforce.com, inc., 6/5/2016 2:33 AM

*Please do not provide the Environment Hub Org Id.

First name, last name and email address of SFDC System Administrator:

These requirements facilitate validation of the installation when this user is enrolled by Qstream in the test Qstream.

- This user MUST be in the same group of SFDC users that will have access to the Qstream App, otherwise this user will not have access to Qstream.
- The email MUST be the same email associated with the user's Salesforce account.

Step 2: Salesforce Administrator performs setup tasks within their own SFDC environment.

Salesforce Administrator installs the Qstream App within SFDC and provide access to the appropriate Role/Group within their organization.

The specific Salesforce Administrator tasks are as follows:

1. Install the Qstream App from the link provided by Qstream. [See FAQ](#)
 - a. Set the installation for Admins only. This defaults Qstream custom objects to "off" for all other profiles. [See FAQ](#)
2. Enable access to Qstream for the appropriate SFDC users based on the appropriate profiles.
 - a. Ensure that users have access to the Qstream tab AND the Qstream Visualforce page.
3. Provide the URL of the tab to Qstream. This allows Qstream emails to bring users directly to the Qstream tab when a question is submitted. [See FAQ](#)
4. Enable access to Qstream through Salesforce1.

Step 3: Qstream completes the setup of the Qstream site

Qstream creates and configures a site for the client that is connected to the SFDC instance.

Step 4: Qstream and Salesforce Administrator validate the integration is complete

To verify the integration is complete:

1. Qstream creates a test Qstream with one question, which will be used to confirm the connection after the set-up.
2. Qstream enrolls the SFDC Admin user provided in Step 1 into this test Qstream.

3. Salesforce Administrator verifies that the email has been received. When the answer link is clicked, the user is brought directly to the Qstream tab in Salesforce. The user may have to authenticate if they are not already logged in to SFDC.

Component 2: Data export (Qstream to SFDC)

For additional synchronization (i.e. either roster sync to from SFDC to Qstream or data export from Qstream to SFDC) these steps are required:

Step 1: Salesforce Administrator provides Qstream with a SFDC user that also has the rights to administrate SFDC.

Step 2: Client SFDC User follows authentication workflow to establish a connection between SFDC and Qstream

Step 3: Qstream verifies user has been authenticated and has access

Step 4: Data is synchronized between Qstream and Salesforce

Step 5: The continuous data export from Qstream to Salesforce enables sync in real time

Step 1: Salesforce Administrator provides Qstream with a SFDC Admin User

Qstream enters the email address of the Salesforce Administrator in the Assign Salesforce sync user account field.

An email will be sent to the SFDC email address provided. The Salesforce Authentication URL may also be used to authenticate.

Currently there is no synch user account activated to allow for Import/Export of data. This account must also exist in the Salesforce organization to which you will synch. Search for and assign the Sync User Account below.

Assign Salesforce sync user account in Qstream.
Required. If the account doesn't exist in Qstream it will be created when you click "Save settings"

Assign

Salesforce Authentication URL: <https://salesforce-internal.qstream.com/auth/salesforce>

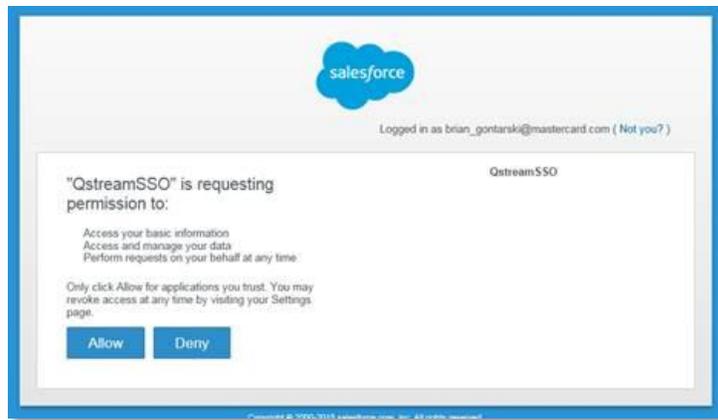
Step 2: Client SFDC user follows authentication workflow

The SFDC user receives an email from Qstream. To establish the connection, the link in the email is clicked to authenticate (or the link to Salesforce is selected on the clientname.qstream.com login page).

This credentials of the SFDC user are then verified to complete the link between the Salesforce organization and the Qstream site.



After logging in, the SFDC user again gives permission to the Qstream App.



Step 3: Qstream verifies connection has been established

Qstream verifies the connection by logging in to the Qstream site to access the Salesforce settings.

Step 4: Synchronize the data between Qstream and Salesforce

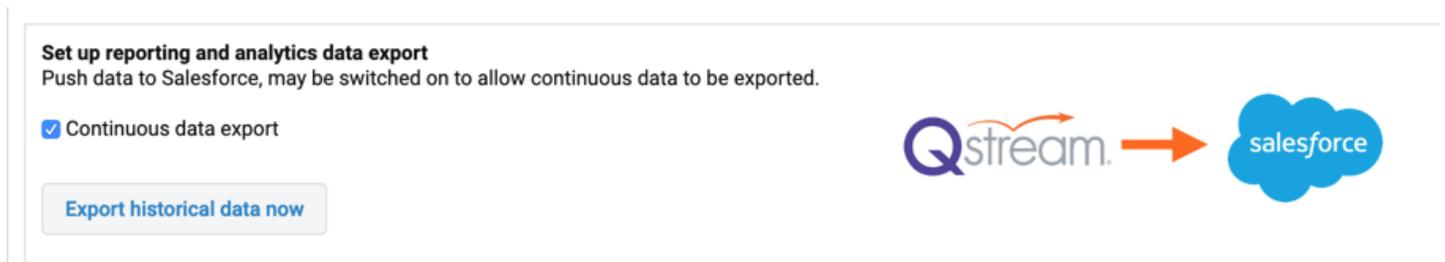
Setup is completed and data synchronization between Qstream and Salesforce begins.

Step 5: The continuous data export from Qstream to Salesforce enables sync in real time

A continuous data export pushes Qstream data to Salesforce.

****Note****

For customers that are enabling data export **AFTER** they have run Qstreams, it's necessary to select, 'Export historical data now'.



Component 3: Roster Feed (SFDC to Qstream)

Step 1: Roster import Salesforce to Qstream

Step 2: Roster synchronization occurs from Salesforce to Qstream

Step 1: Roster import from Salesforce to Qstream

This component requires customized work in conjunction with Qstream's engineering team and the Salesforce Administrator.

The following details are required to better assess the level of effort for the Roster Feed Component:

- Should all Salesforce users, or only a subset of users, be mirrored in Qstream?
- If only a subset, how does the Salesforce Administrator and Program Manager identify those users in Salesforce? (Preferred: Tag Name = Is_Salesforce_User, Tag Value = True)
- How is the management hierarchy structured? Is role hierarchy in place?
- What additional user fields should be fed in to Qstream? Custom user fields can be included and this data impacts Qstream tagging/reporting.

Step 2: Roster synchronization occurs from Salesforce to Qstream

The Salesforce sync feature moves user data from Salesforce to Qstream. Since this is not a continuous action, the client and Qstream should agree on the frequency of this Salesforce sync.

The SFDC admin explains how the Qstream users are indicated in SFDC. Our recommended approach is to add an extra field on the User object in SFDC called 'isQstreamUser' (default to false) and set those who we want in Qstream to 'true'.

Once that has been established, Qstream can run the synch but only those users who match the filter in SFDC will be uploaded. Engineering on the Qstream side will apply the filter and ensure the synch is correct.

Setup FAQs

What is the most current Install Package?

It is imperative that the Qstream Client Services Consultant provide a link to the most recent version of this install package. Your Qstream Client Services Consultant will provide you with the latest installation link.

How do you get the URL of the Qstream Tab?

The steps to acquire the exact URL may vary and is dependent on the browser and/or operating system. The typical process is completed by right clicking on the Qstream tab and selecting the option to get the URL.

For example, in Chrome the option is to right click and select the "Copy link address" option. The terminology of this action may vary from browser to browser.

The format of the URL should be, note the unique lid value:

<https://sitename.my.salesforce.com/servlet/servlet.Integration?lid=01r1a000000QApi&ic=1>

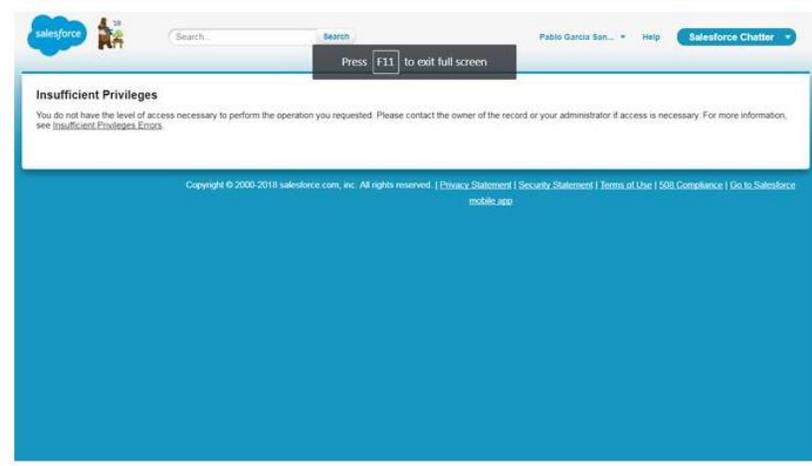
Why should you disable Force SSO?

Force SSO means that all users MUST login via Salesforce, but is restrictive if access is provided to users who just want to log in to Qstream (to view reports or respond to questions via Qstream) that are not Qstream users.

Qstream caters to users that are a mix of Salesforce and Non-Salesforce Users. This is achieved by setting the tag `Salesforce_user = false` of the user. Then the link in the email, instead of directing them to Salesforce, will direct them straight into Qstream.

What happens if users receive an 'Insufficient Privileges' error message in the Qstream Tab?

Both access to the Qstream Tab and Visualforce page must be enabled to avoid this error. If users are provided access only to view the Qstream Tab this error message will be displayed, however, providing users with access to the Visualforce page will correct the issue.



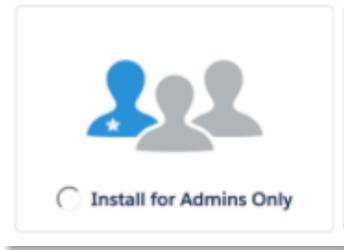
To locate the Visualforce page. Navigate to VisualForce pages under 'App Setup'. Find Qstream. Select 'Security' for the Qstream page and enable the appropriate profiles.

What if I'm using SFDC Lightning?

Our integration is compatible with SFDC Lightning and Classic. However, if you have users on both, it's recommended to use the Lightning URL in order to avoid any unintended errors. Be sure to talk to your Qstream Client Services representative for updates to the install package if using Lightning.

Why select 'admin only' instead of 'all users' during the installation process?

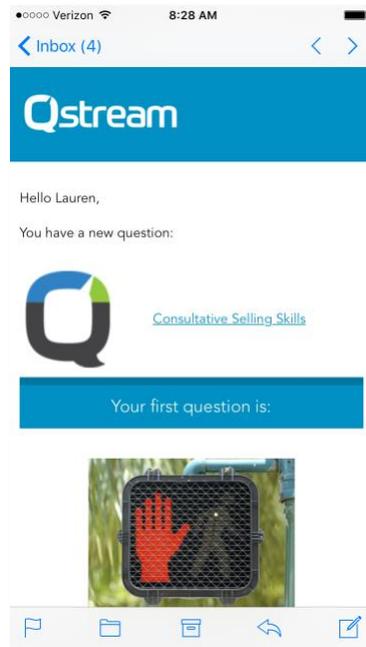
The recommendation and best practice is to select 'admin only' to ensure only a subset of users can access the Qstream application within Salesforce. Salesforce Admins can then enable additional subsets of users on an as-needed basis. 'All Users' will provide access to the Qstream applications regardless of their profile and if they should have access to the Qstream tab.



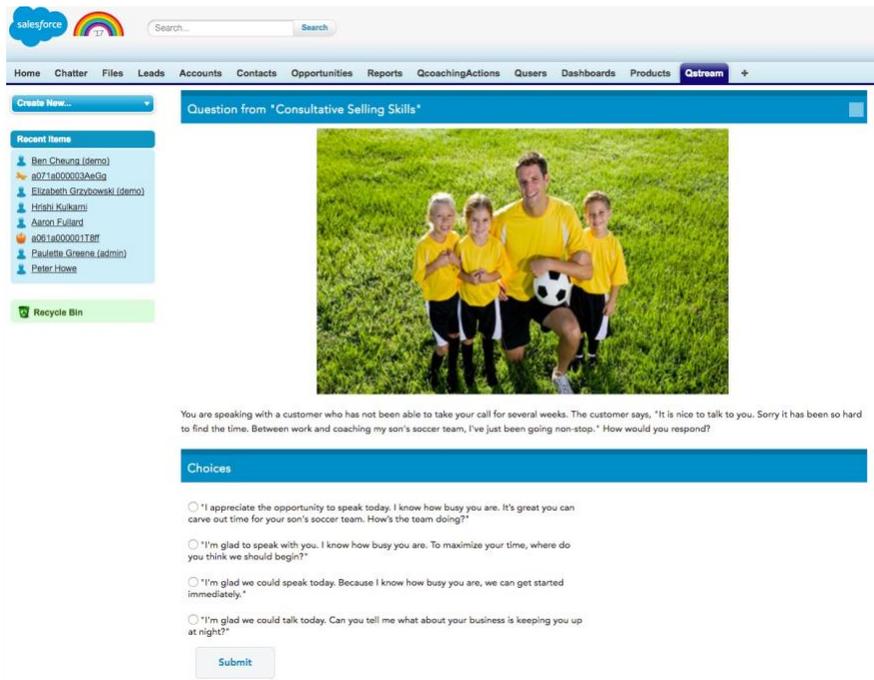
User Experience

Participant Experience Answering Questions

Participants will receive email notifications from Qstream notifying them when they have questions available.



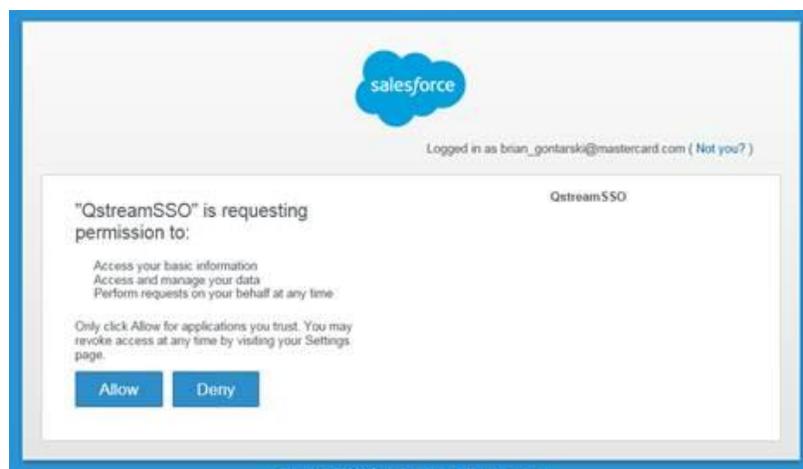
If setup as a Salesforce user, clicking on the Answer button will re-direct them to the Qstream tab within their Salesforce account. If they are setup as not a Salesforce user (user tag salesforce user = false), then they will be directed to Qstream.



From within the Qstream tab in Salesforce, users may access the following information for any Qstreams in which they've been enrolled:

- Answer Qstream questions
- View their current status
- View leaderboards

Note: If the user is connecting to Qstream for the first time, after he/she clicks the Answer button in the question notification email, they may be redirected to this page.

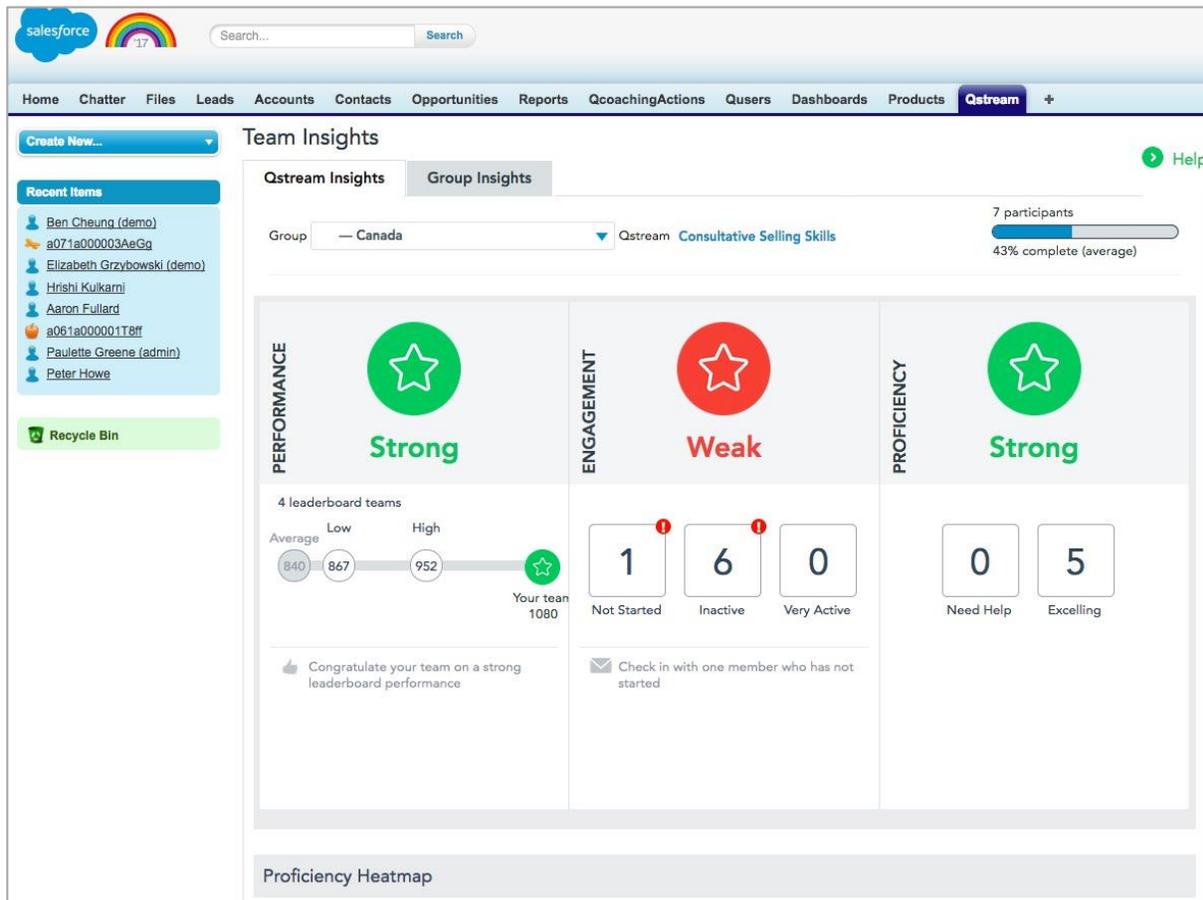


Once they click Allow, they'll be brought into SFDC and will be able to answer their question.

Manager Experience

Qstream manager dashboards

Managers (group owners) will have access to the Qstream dashboards from within the Salesforce, as well.



Up-to-date data is presented to managers so that they can easily identify gaps in performance, engagement and proficiency across their team. Managers can coach their reps right from the Qstream Manager Dashboard within SFDC by clicking on any of the actionable insights links (coaching opportunities).

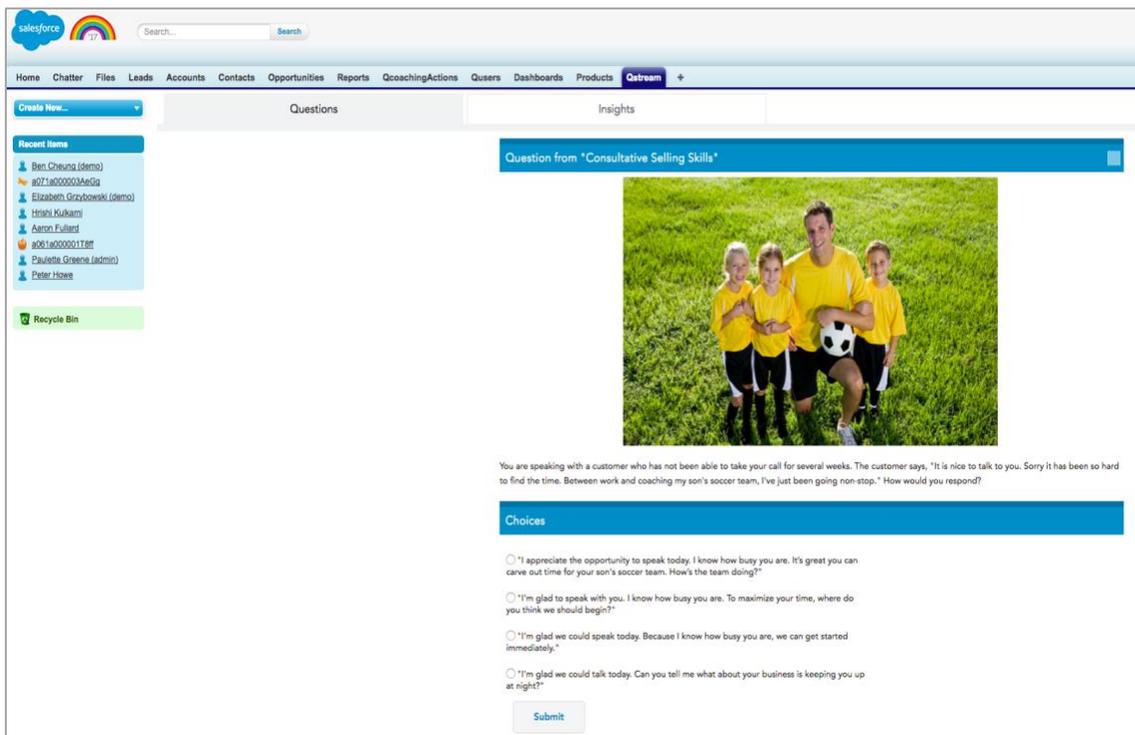
The manager dashboard functionality depends entirely on the management group hierarchy settings on the client's Qstream site. The hierarchy will be setup by SFDC if a roster sync to from SFDC to Qstream has been setup, otherwise it is set up and managed manually (within Qstream).

If a user is a manager and is participant, his/her view will be slightly different (see below).

Combined Experience

Managing your team and answering Qstream questions

Clicking on the Questions tab within the Qstream tab will allow managers to answer their Qstream questions.



Clicking on the Insights tab within the Qstream tab will allow managers to view their Qstream Manager Dashboard.

salesforce  Search... Search

Home Chatter Files Leads Accounts Contacts Opportunities Reports CoachingActions Quers Dashboards Products **Qstream** +

Create New... Questions Insights

Recent Items

- Ben Cheung (demo)
- @071a000003AeGg
- Elizabeth Grzybowski (demo)
- Hrishi Kukarni
- Aaron Fullard
- a061a00001T8ff
- Paulette Greene (admin)
- Peter Howe

Recycle Bin

Team Insights

Qstream Insights Group Insights Help

Group: Canada Qstream Consultative Selling Skills 7 participants
43% complete (average)

Metric	Status	Count	Category
PERFORMANCE	Strong	1080	Leaderboard
ENGAGEMENT	Weak	6	Not Started
PROFICIENCY	Strong	5	Excelling

4 leaderboard teams
Average: Low (840) - High (952) - Your team (1080)

1 Not Started, 6 Inactive, 0 Very Active

0 Need Help, 5 Excelling

Congratulate your team on a strong leaderboard performance

Check in with one member who has not started

Proficiency Heatmap

One Burlington Woods Drive Burlington MA 01803
(781) 222-2020 | info@qstream.com | qstream.com

