

FD - P13 bis. NPS User management

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Version Control

Version	Date	Description	Author
v.1	01.03.2021	Creation	Josiane Peytraud

1. In Salesforce

In order to be able to see the NPS Campaign and NPX information in Salesforce, a user must have a NPX Role.

This NPX Role has 2 values: NPX Admin and NPX User.

NPX Admin can create a campaign and set the field "Send NPS Survey" to "Yes".

The information "NPX Role" is in the section:

- "For Administrators" for Core
- "Additional Information" for ICare

As soon as you add a NPX Role to a user, the user is added to the Permission set "SatMetrix view".

Specificities for Core. the visibility of the campaigns is per GBU. To do so, there is 1 Public group per GBU. The group name is built as follow: GBU code on 2 digits + "-SHR-NPS Users". Example for Silica: SI-SHR-NPS Users

As soon as you add a NPX Role to a user, the user is added to the corresponding public group of his GBU(s). This is done based on the field "Multi-GBU Access".

ATTENTION: if a user already has a NPX Role and you add a GBU in the "Multi-GBU Access", the user will NOT be added to the corresponding public group. To do so, we need to remove the NPX role, add the GBU and re-add the NPX role.

For the Campaign GSKA, the GBU is Corporate. Users needing to access it are from different GBUs. So there is an additional Public Group "All NPX users". This public group is the "sum" of the different NPS groups of each GBU.

For all GSKA topic, it has been created a specific Public Group: "EKAM-SHR". This group is also included in the "All NPX users" one.

2. In NPX

We need to create 1 user per environment.

NPX User Name = Salesforce Username

Email = must be unique. So if a user has to be created on the 2 environments, we decided to add "crm" in the email address for Core

Example for **Icare**:

NPX User Name *

First Name *

Last Name *

Active ☒ Yes

Email * 

Phone 

And for **Core**:

NPX User Name *

First Name *

Last Name *

Active ☒ Yes

Email * 

Phone 

3. Procedure

[Procedure to create & update users in NPX](#)