Configuration manual Flexible questionnaire (update release 2025-03)

From release 2023-04, it is possible to set up flexible questionnaires for candidates or contacts, where they answer the questions directly via a link to an Experience Cloud portal. The answers are stored in MSR and can be used with the help of flows to find out the person, the application or a ticket, for example.

In release 2025-03, you can create a link directly to an object and a field when setting up questions. After replying, these are immediately processed in the records associated with the invitation.

This manual provides instructions on how to set this up and describes all the configuration steps of this module.

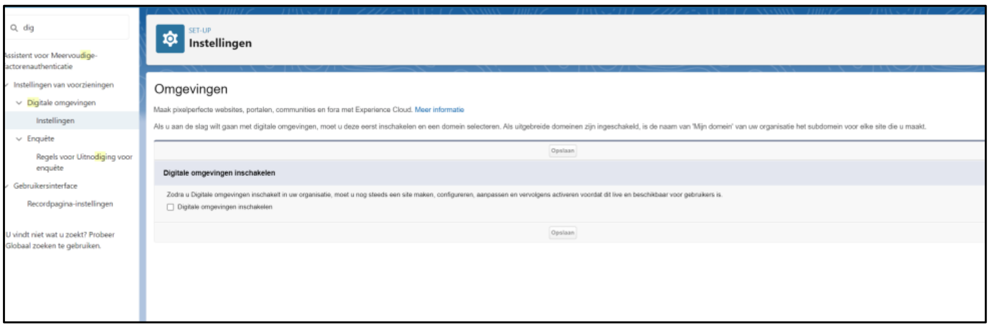
Table of contents

Experience Cloud

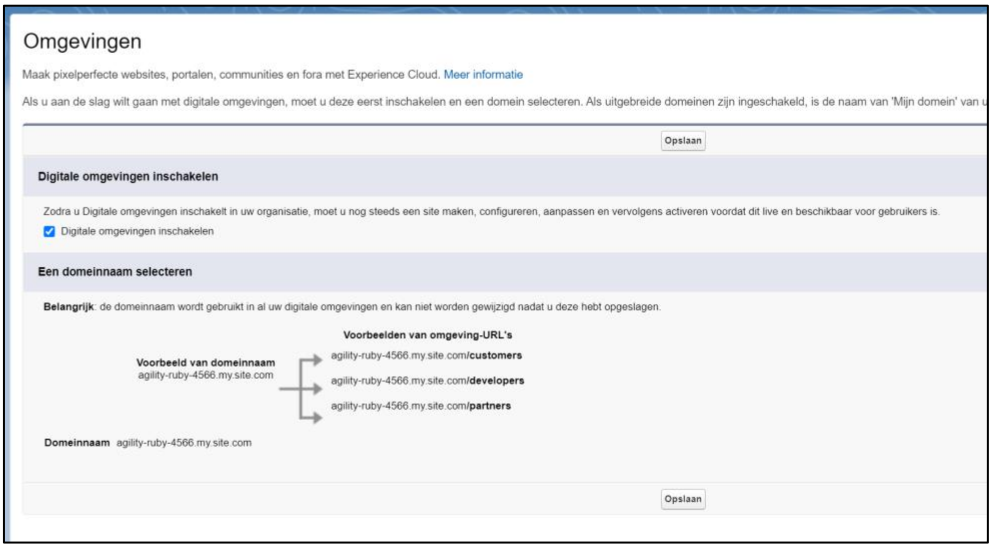
To send a contact a link to the environment to answer the questionnaire, the Experience Cloud from Salesforce is used. Specifically for answering the questionnaire, a site consisting of 1 page will be set up.

Digital environment settings

First of all, you need to activate the Digital environment via the Setup, Digital environments, Settings:



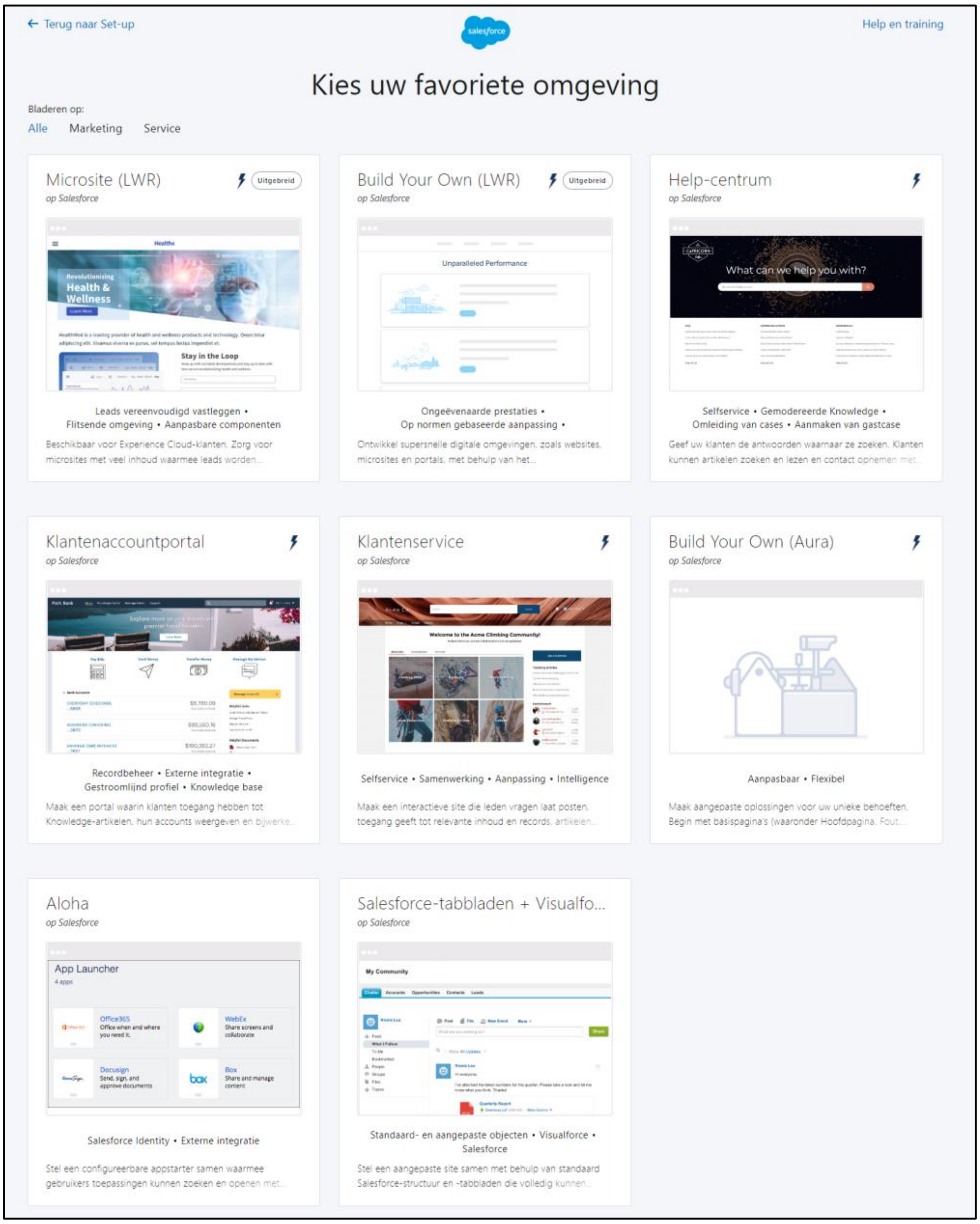
Turn on the digital environment.



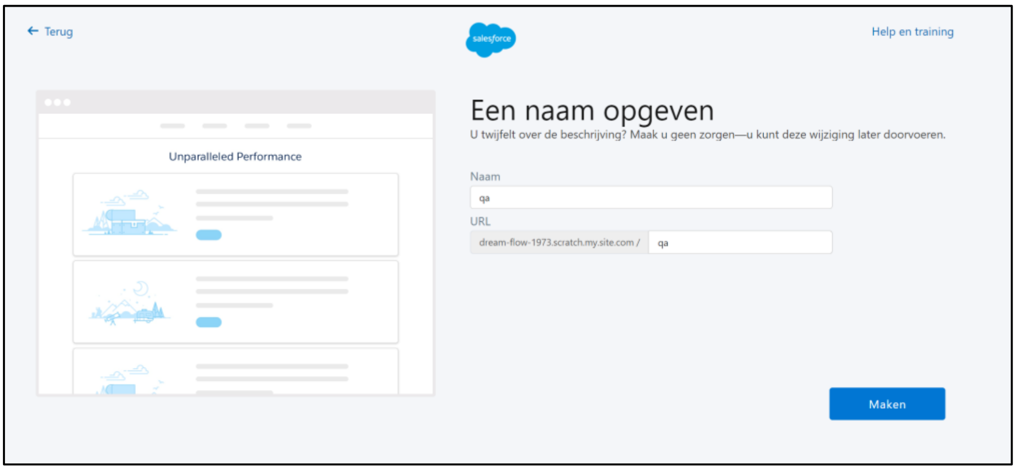
After saving, you will be taken to the screen below and you can create a new site:

Creating a site

Select Build Your Owm (LWR) from the list below. Since the appointment scheduling site contains one page, this is the best option.


Terug naar Set-up
Help en training
Kies uw favoriete omgeving
Bladeren op:
Alle
Marketing
Service
Microsite (LWR)
Uitgebreid
op Salesforce
Leads vereenvoudigd vastleggen • Flitsende omgeving • Aanpasbare componenten
Beschikbaar voor Experience Cloud-klanten. Zorg voor microsites met veel inhoud waarmee leads worden...
Build Your Own (LWR)
Uitgebreid
op Salesforce
Ongeëvenaarde prestaties • Op normen gebaseerde aanpassing •
Ontwikkel supersnelle digitale omgevingen, zoals websites, microsites en portals, met behulp van het...
Help-centrum
op Salesforce
What can we help you with?
Selfservice • Gemodereerde Knowledge • Omleiding van cases • Aanmaken van gastcase
Geef uw klanten de antwoorden waarnaar ze zoeken. Klanten kunnen artikelen zoeken en lezen en contact opnemen met...
Klantenaccountportal
op Salesforce
Recordbeheer • Externe integratie • Gestroomlijnd profiel • Knowledge base
Maak een portal waarin klanten toegang hebben tot Knowledge-artikelen, hun accounts weergeven en bijwerke...
Klantenservice
op Salesforce
Selfservice • Samenwerking • Aanpassing • Intelligence
Maak een interactieve site die leden vragen laat posten, toegang geeft tot relevante inhoud en records, artikelen...
Build Your Own (Aura)
op Salesforce
Aanpasbaar • Flexibel
Maak aangepaste oplossingen voor uw unieke behoeften. Begin met basispagina's (waaronder Hoofdpagina, Fout...
Aloha
op Salesforce
App Launcher
Salesforce Identity • Externe integratie
Stel een configureerbare appstarter samen waarmee gebruikers toepassingen kunnen zoeken en openen met...
Salesforce-tabbladen + Visualfo...
op Salesforce
Standaard- en aangepaste objecten • Visualforce • Salesforce
Stel een aangepaste site samen met behulp van standaard Salesforce-structuur en -tabbladen die volledig kunnen...

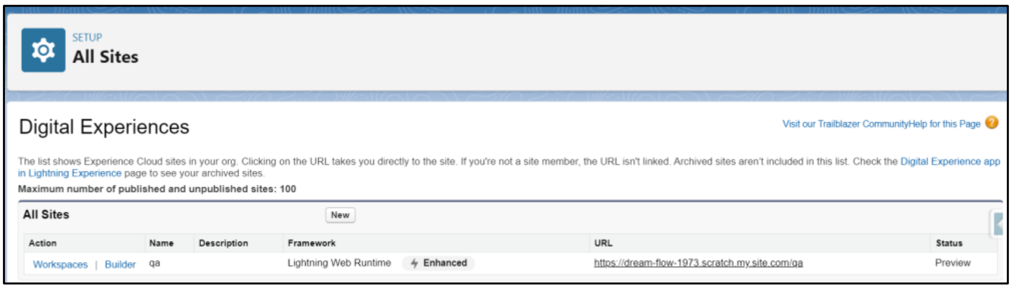
Choose a name and a URL, then create the site.



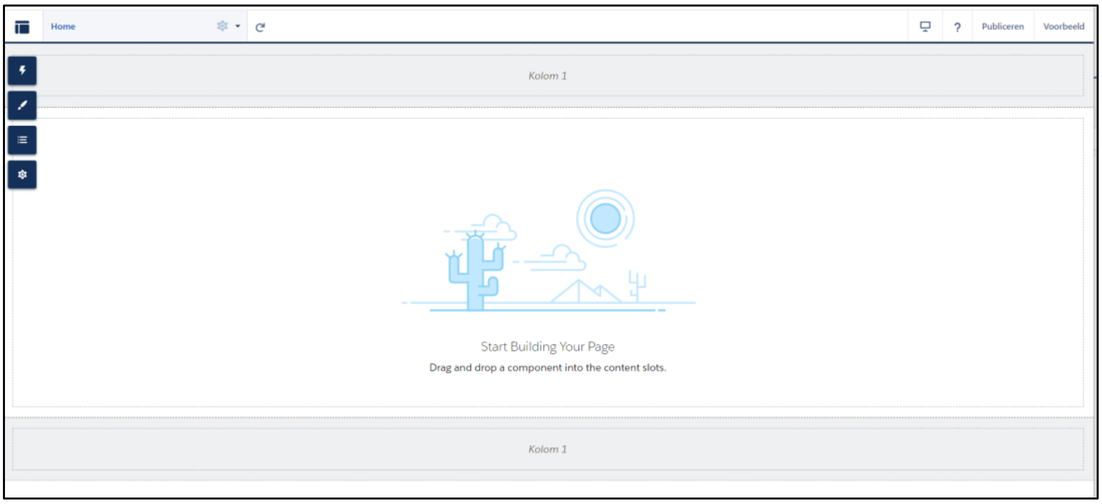
Basic Site Configuration

Once the site is created, you can adjust the settings and set up the necessary components on the page.

Via Setup, Digital environments, All sites, you can configure the site.

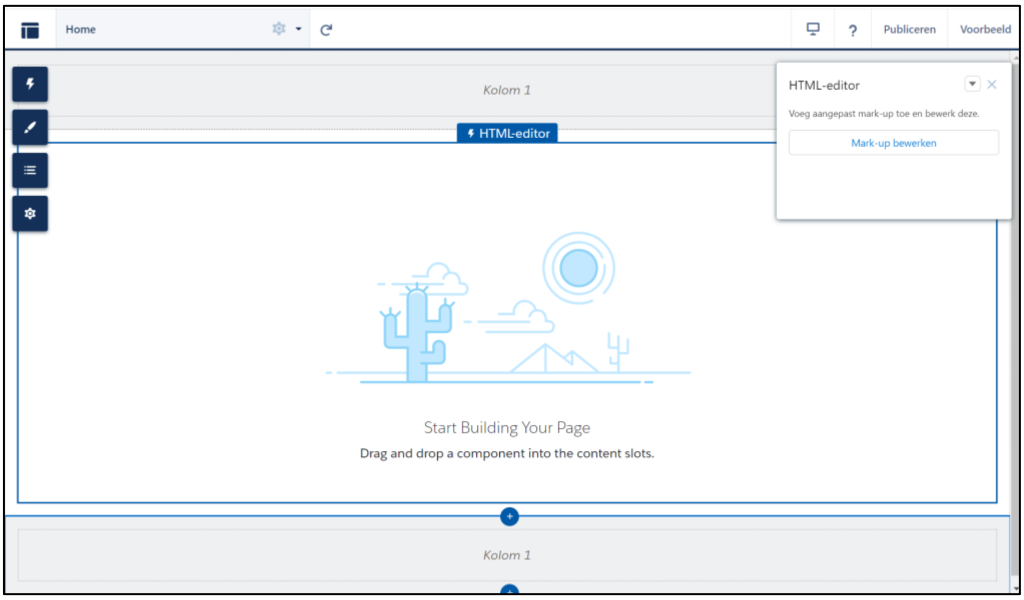


Choose the Composer:

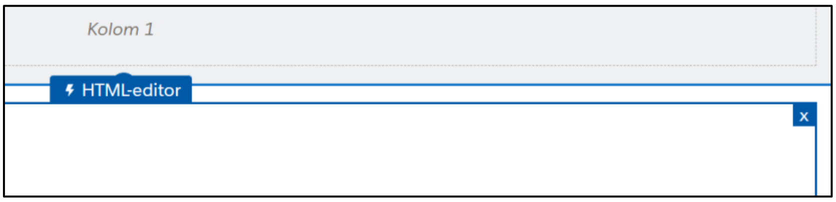


You will then be taken to the environment where you can add components and settings to the site and the pages.

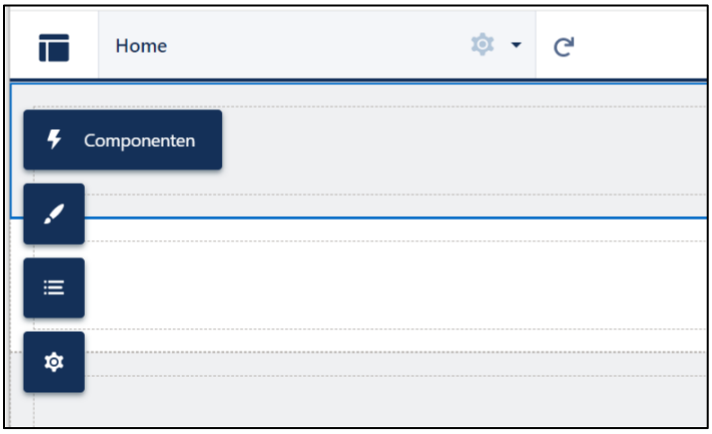
First of all, you need to remove the automatically added HTML component by clicking in the middle of the page.

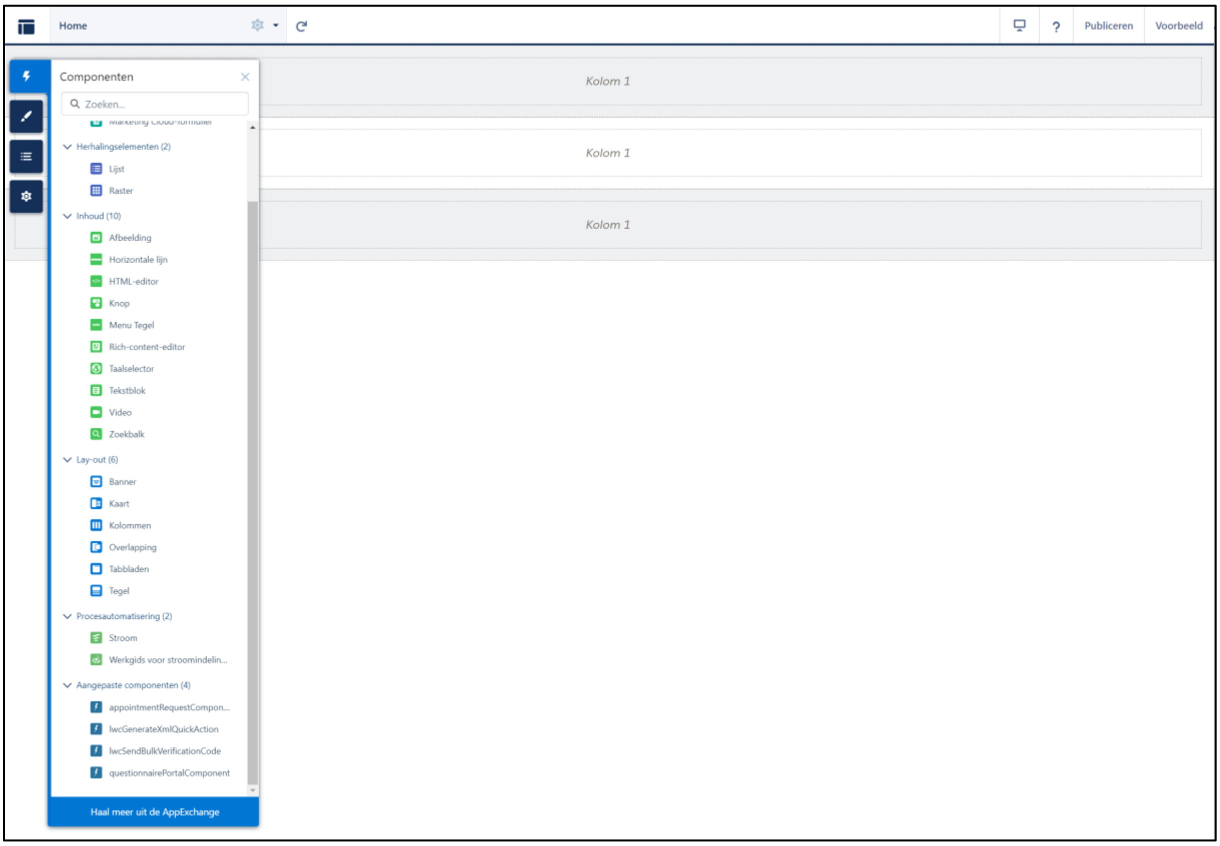


You then click away the pop-up using the cross and you remove the HTML component by clicking on the cross in the top right corner again:



Now you can add a new component to the page via the component in the menu:



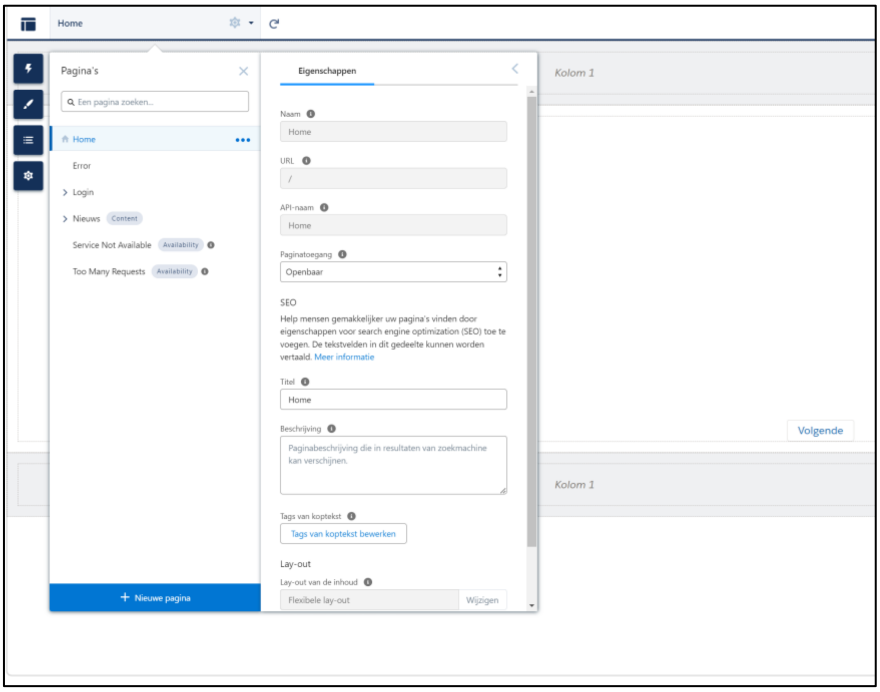


You drag the custom component questionnairePortalComponent onto the screen.

Note: not all components are available in a customer environment, for this you need at least an active Community license.

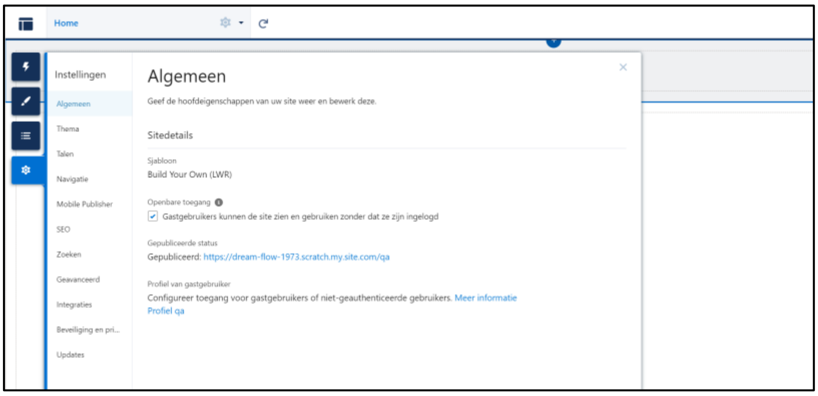
Page access

Before you can publish the site, you need to change the page properties. Click on the cog icon of the Home page and set the Page Access to public:



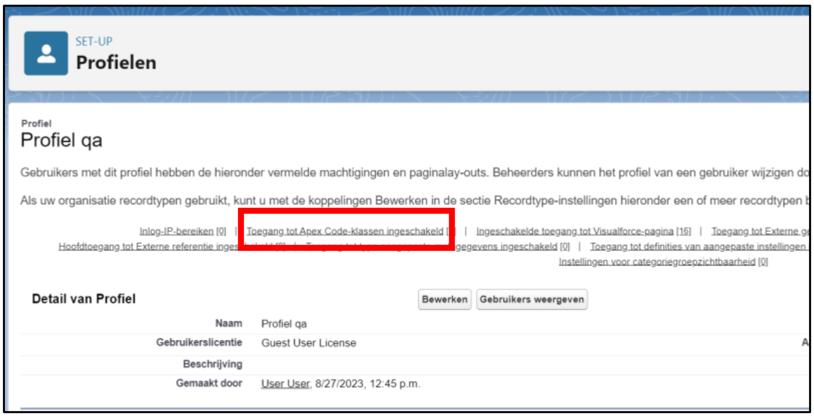
Guest Use Profile

Finally, you need to adjust the settings by selecting the gear icon from the menu:

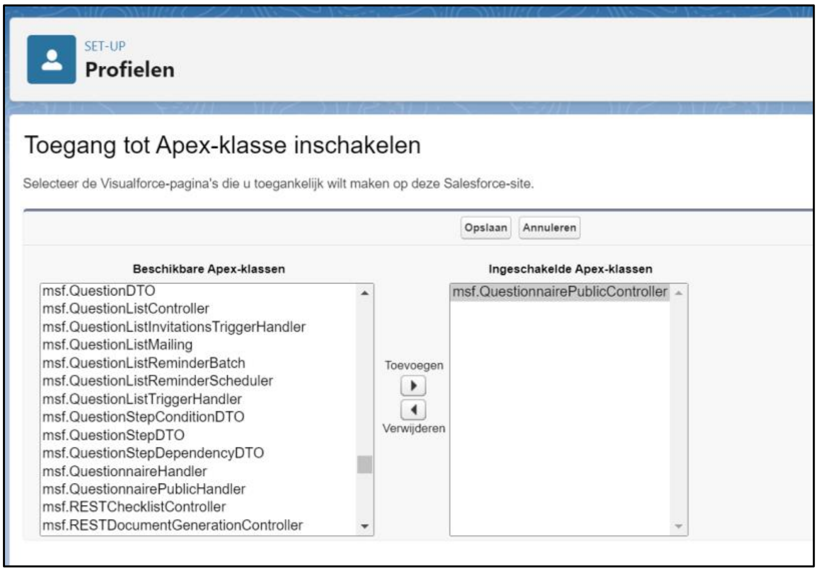


Select Guest users can see and use the site without being signed in. Then press the hyperlink Profile 'qa' (the latter is the same as the name of the site, which may differ in a customer area).

You open the profile in another tab:



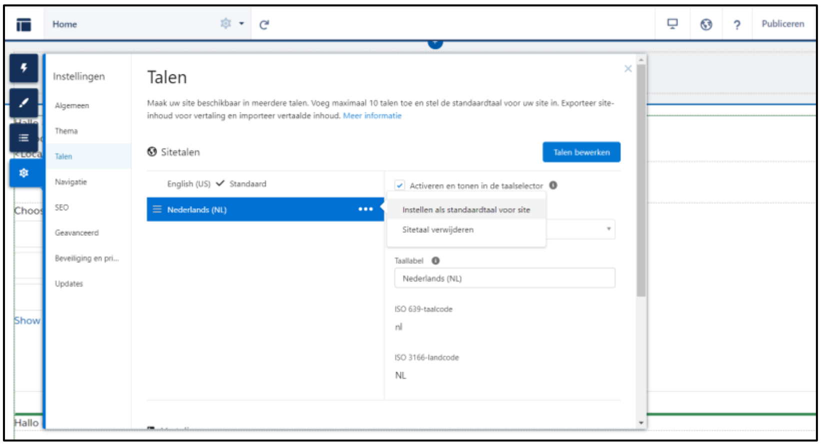
Add msf. QuestionnairePublicController to Access Apex Code classes:



Save the profile and navigate back to the site composer.

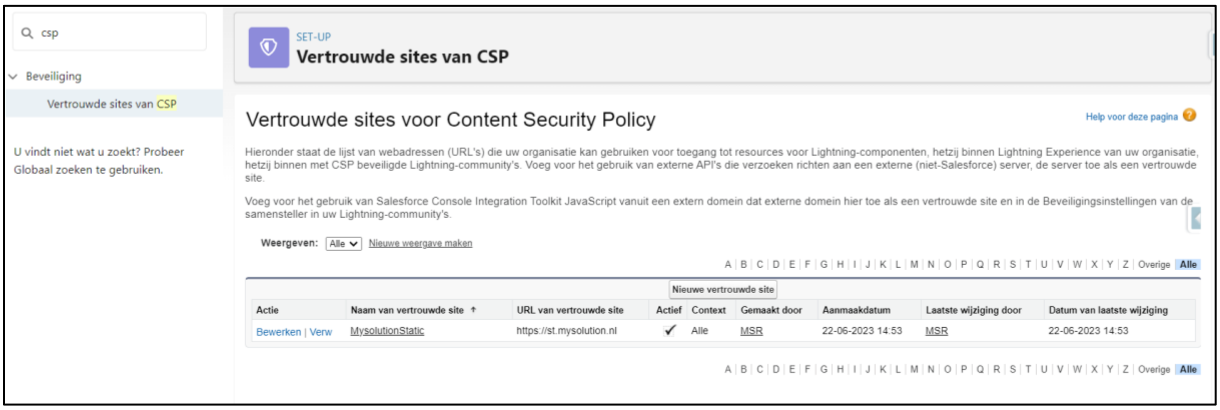
Language of the portal

Depending on the language of the user doing this configuration, the default language is chosen. If the English language is used, add Dutch and make it the default:

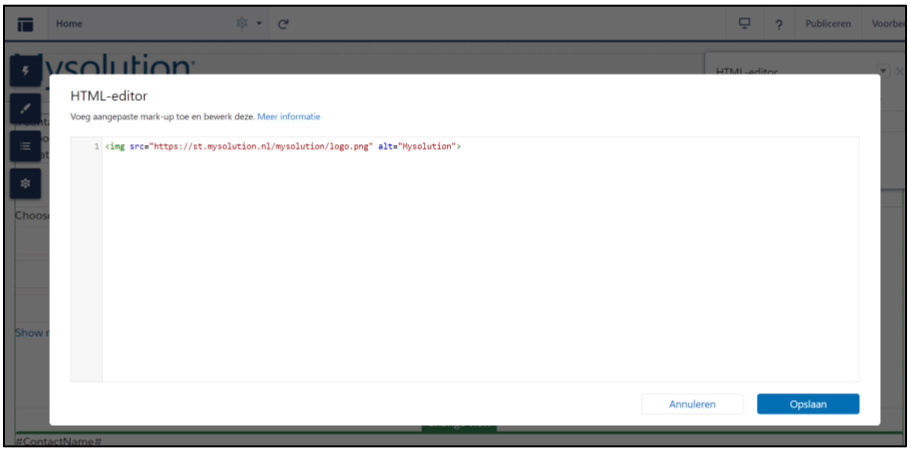


Adding an image

For images, use a URL and make sure that the web location is added as a trusted URL, via Setup, Trusted URLs. Logos can be added to the static resource environment by Mysolution. You then add the site:



Then you can drag an HTML component to the header and enter the URL of the logo in the familiar environment:

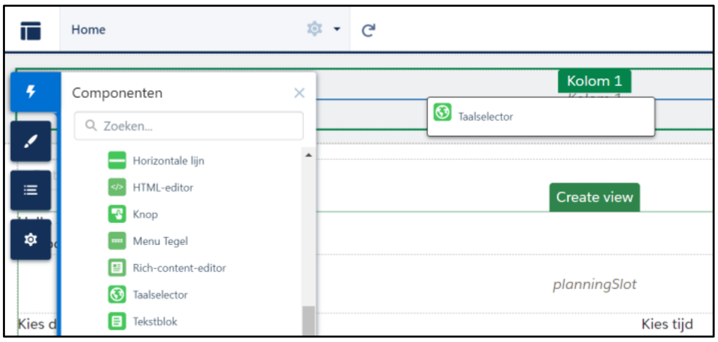


<img src="https://st.mysolution.nl/mysolution/logo.png" alt="Mysolution">

The IMAGE component is not available in the free experience cloud.

Additional configuration (based on active community license)

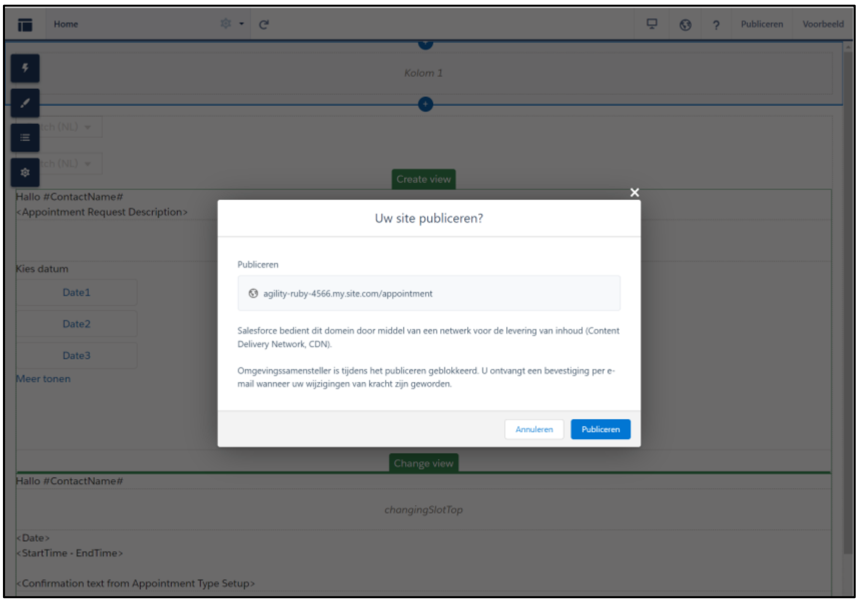
If you want to support multiple languages on the page, add the Language Selector component to the header on the page:



In addition, you can also use the Image component instead of the HTML view.

Publishing site

If you are satisfied with the layout, choose publish:



This may take a while. The user will receive an automatic email notification when it is ready:

You can now close the environment composer.

MSR configuration steps

Custom settings

A new custom setting is available for the flexible questionnaire. You can find these in the Setup, Custom settings, Question and Answer settings:

Enter the site URL in the Appointment Request EC Portal field. You can copy these from the list via Setup, Digital environments, All sites.

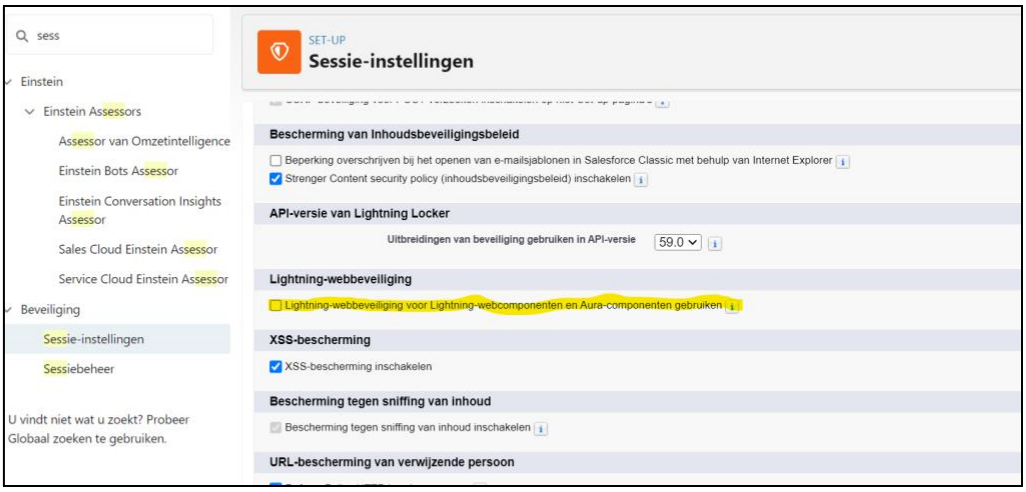
Permissions/profiles

A number of new objects have been introduced for the questions and answers.

- Answers (msf__Answers__c): new object to record the answers of the single and multiple question types. Administrators: All fields edit access, Users: All fields read access.
- Demand Conditions (msf__Step_Conditions__c): new object to record demand conditions. Administrators: All fields edit access, Users: All fields read access.
- Questions (msf__Question__c): New object to capture questions. Administrators: All fields edit access, Users: All fields read access.
- Questionnaire Responses (msf__Question_List_Answers__c): New object to store the given answers per contact record. Administrators and users: All fields edit access.
- Questionnaires (msf__Question_List__c): New object to record the questionnaires. Make this available as a tab. Administrators: All fields edit access, Users: All fields read access.
- Questionnaire steps (msf__Question_List_Step__c): New object to determine the order of the questions per questionnaire. Administrators: All fields edit access, Users: All fields read access.
- Questionnaire invitation (msf__Question_List_Invitation__c): new object to send the invitation to fill in a questionnaire. Administrators and users: All fields edit access.

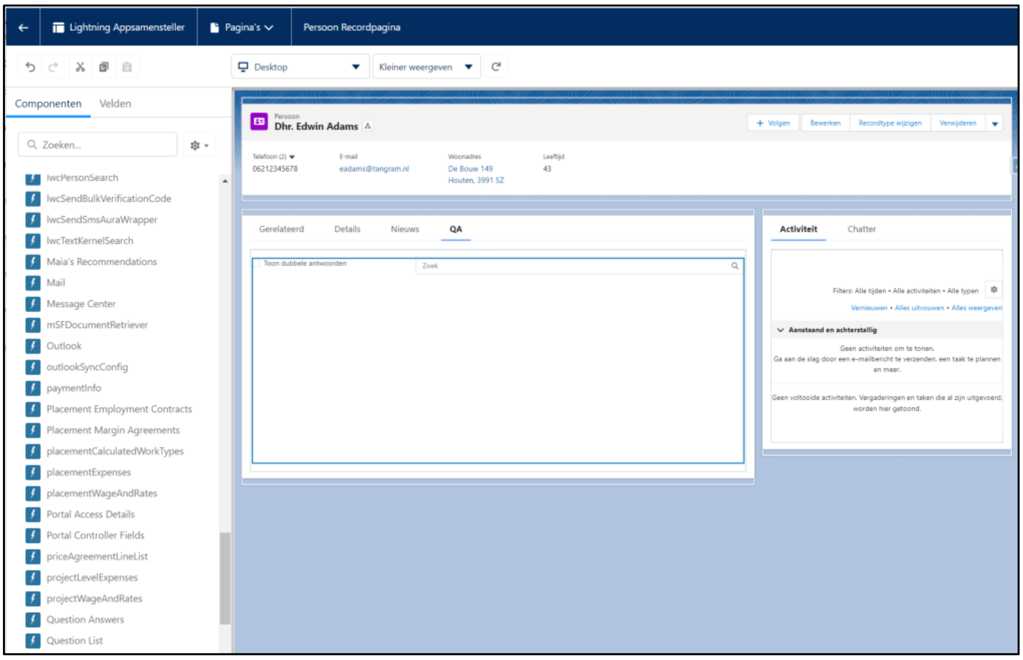
Lightning Web Protection

Make sure that the Lightning web protection for LWC components is enabled in the Setup, Session Settings:



Pagelay-out

There is an LWC component available 'Question Answers' to display the given answers on the people page. To do this, edit the page of the Contact object:



Object Person

In the object person, go to the relevant page layout and add the questionnaire invitation (and possibly the questionnaire answers) as a related list.

E-mail templates

For the Questionnaire invitation, define new Lightning email templates for the invitation and reminder. Use Sender and Recipient fields. For the portal link, include the fixed tag, for example:

Hello {{{Recipient.Name}}},

Click #QUESTIONNAIRE_LINK# to fill in the questionnaire:

Sincerely,{{{Sender.Name}}}

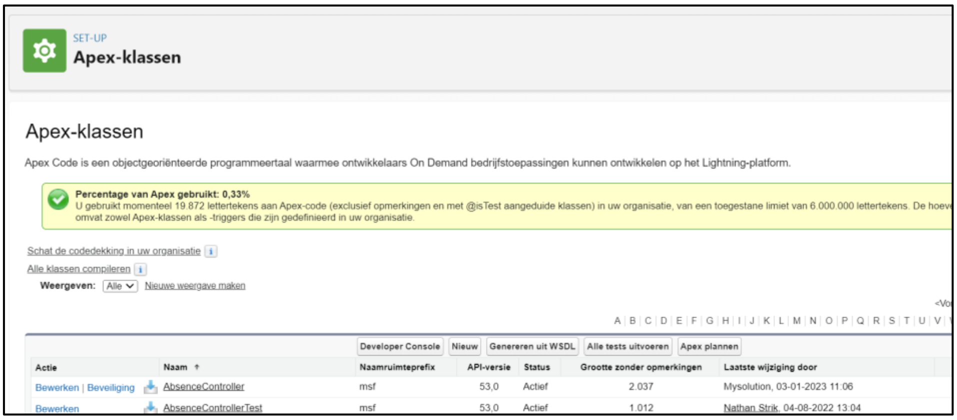
SMS templates

Lightning e-mail templates are also used for the SMS templates. Make sure you limit the number of characters. We recommend setting up only 1 template (SMS or email).

Geplande Apex-klassen

To remind participants to complete the questionnaire, you need to schedule APEX classes.

Go to Setup, Apex Classes and choose Apex plans:

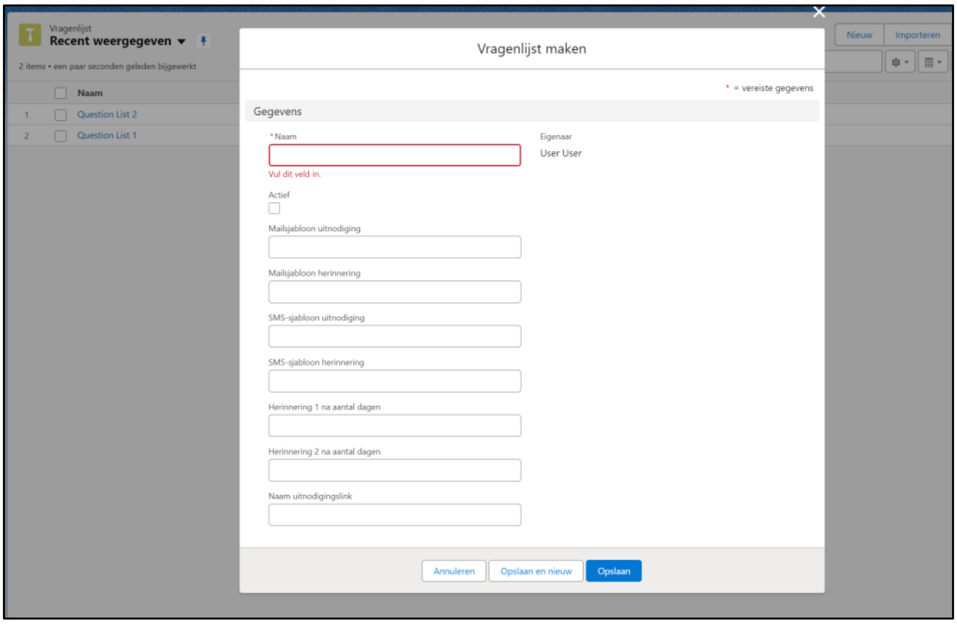


Create an Apex schedule that runs daily from the QuestionListReminderScheduler class.

Functional design

Questionnaire

You can create a new questionnaire via App starter, Questionnaire:

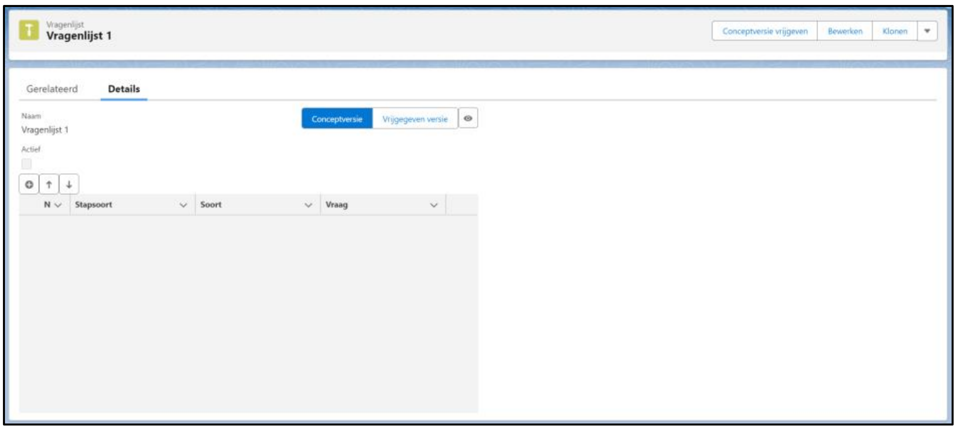


Fill in the email templates for the email or text message. The reminder period for the 1st and 2nd reminder will be used if the questionnaire has not been answered within those days. The name for the invitation link is used to name the hyperlink in the email. This is not used in an SMS.

Please note that you cannot make a questionnaire active in this screen.

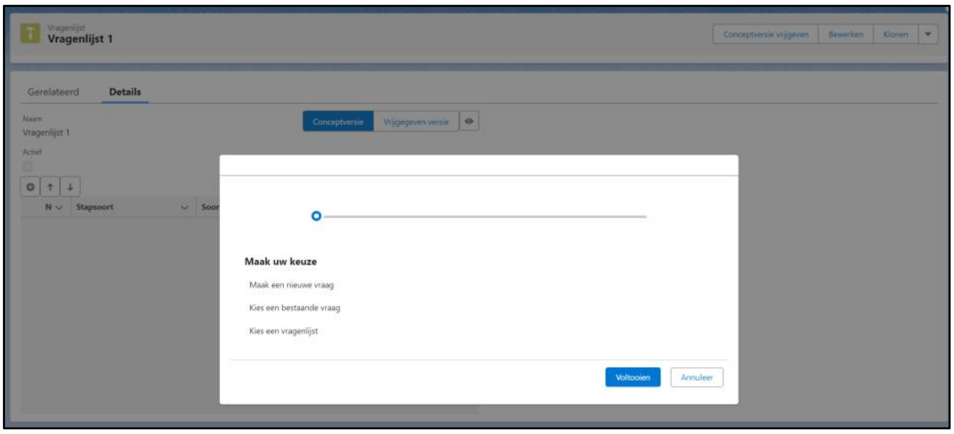
Of course, you can also clone an existing questionnaire and create a new questionnaire from there. The above settings will then be adopted.

After saving you will be taken to this screen:



Adding questions

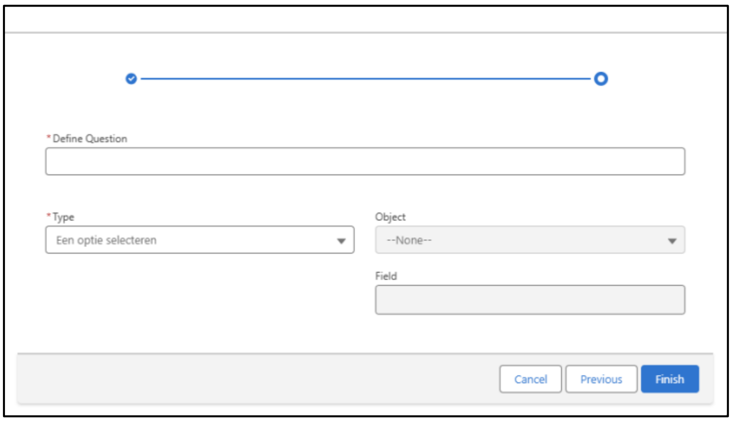
Via the plus sign on the left side of your screen, you can add questions to this questionnaire:



You will then enter the wizard, where you have the following options:

1. Create a new question.
2. Add an existing question to this questionnaire.
3. Add an existing (sub)questionnaire to this questionnaire. You can add questionnaires up to 5 layers deep. Make sure that you do not refer to a parent questionnaire from an underlying questionnaire.

Create a new question



You formulate the question and select the type of answer.

The following question types are available:

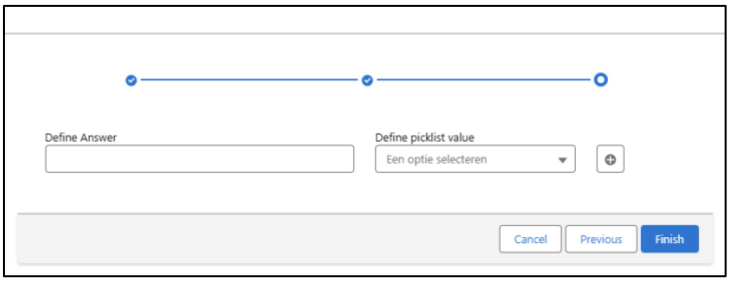
1. One answer: Give the user a drop-down list with multiple options. Only one may be chosen.
2. Multiple answers: Give the user a drop-down list with multiple options. Several may be chosen.
3. Yes or No: The answer is recorded in a checkbox.
4. Date: The answer is a date.
5. Description: the answer is free to enter in a text field.
6. Quantity: the answer is a number.

Only the question types with one or more answer options can be used to set up conditions for hiding or showing a follow-up question.

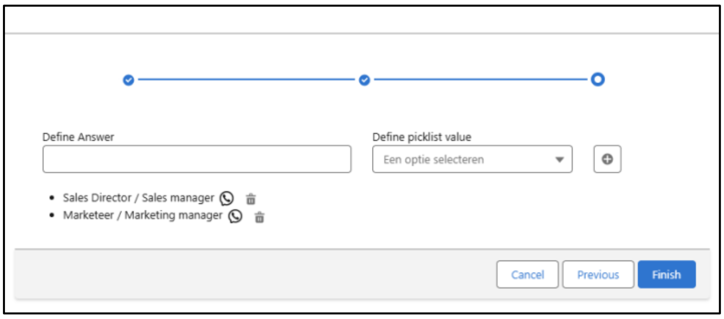
The link object is optional.

- For item, you have the following options from Account, Employment Contract, Job Offer, Application, Person, Placement, or Ticket. These are records that are linked to the questionnaire invitation.
- The choice of field depends on the type of question. This prevents you from linking a reply of type text to a field of type date, for example.

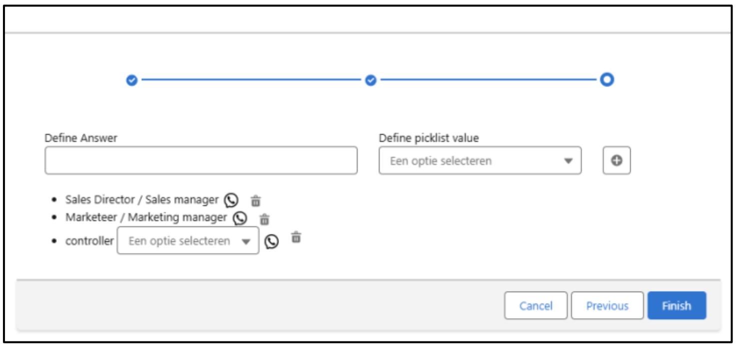
If you choose a question with one or more answers, you can add the answers:



You define the answer. At the Drop-down list value, select the API value of the corresponding drop-down list. To add the option, press the plus sign:



You need to define at least 2 answers to complete the question. With the icon behind the answer, you delete it again. The whatsapp icon indicates whether the answer is suitable for requesting the questionnaire via WhatsApp. The selection option may contain a maximum number of characters.

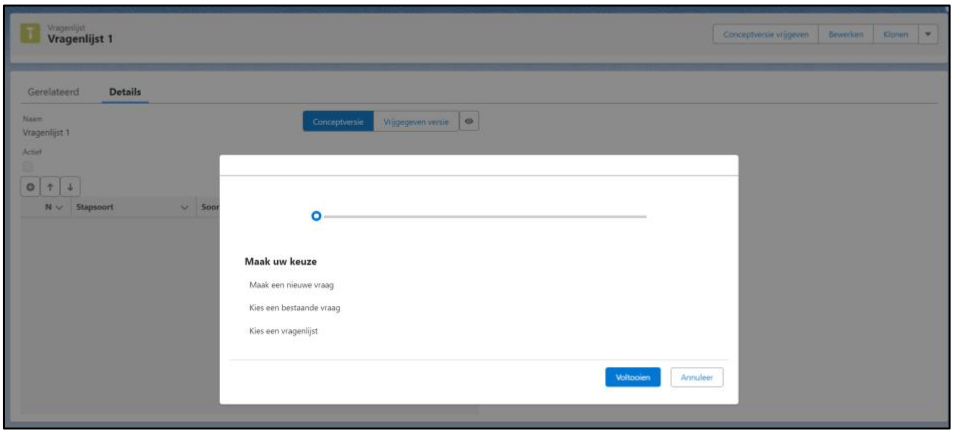


If you want to add or change these values on existing question options, hover over the answer and you can select the correct value.

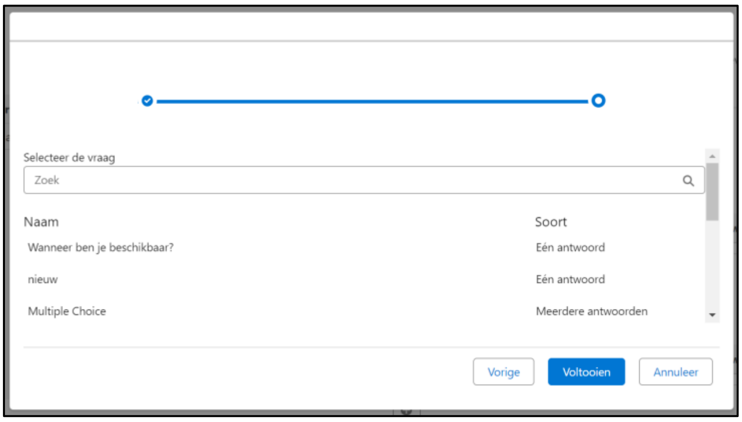
Once the question has been saved, you can only unlink the field and/or object if the entered drop-down list values have been removed from the answer options. For that type of question, you first have to clean up the answers, then you can remove the field and the object from the question itself. It is no longer possible to change the question type once the question has been saved.

Add existing demand

Once a question has been created, it is stored in the library. If a question is removed from a questionnaire, the question remains.



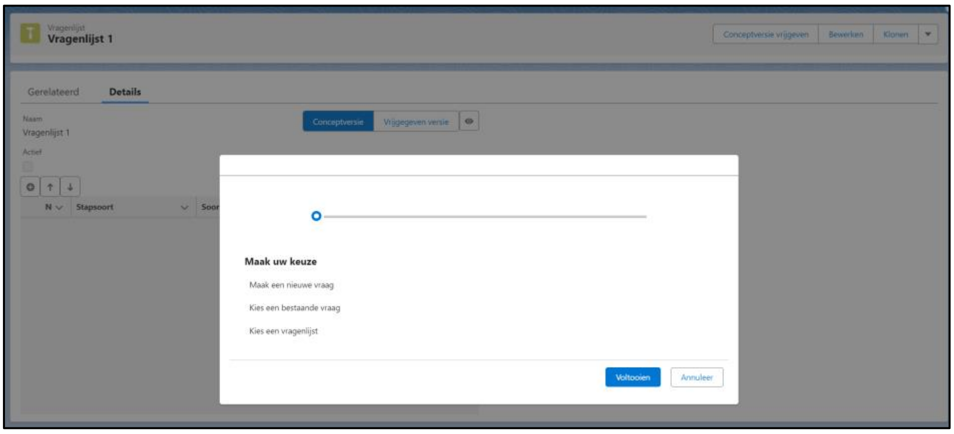
If you add an existing question, you will get the following screen:



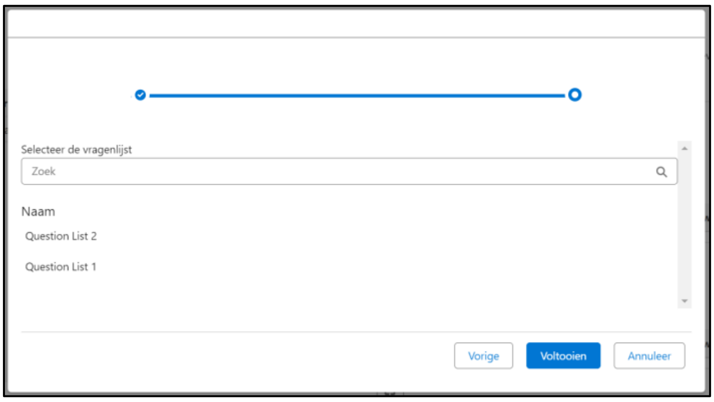
You select the question and it will be added. You can also search for a question.

Add (sub) questionnaire

You can also include common questions in a separate questionnaire and include that questionnaire as a subquestionnaire:

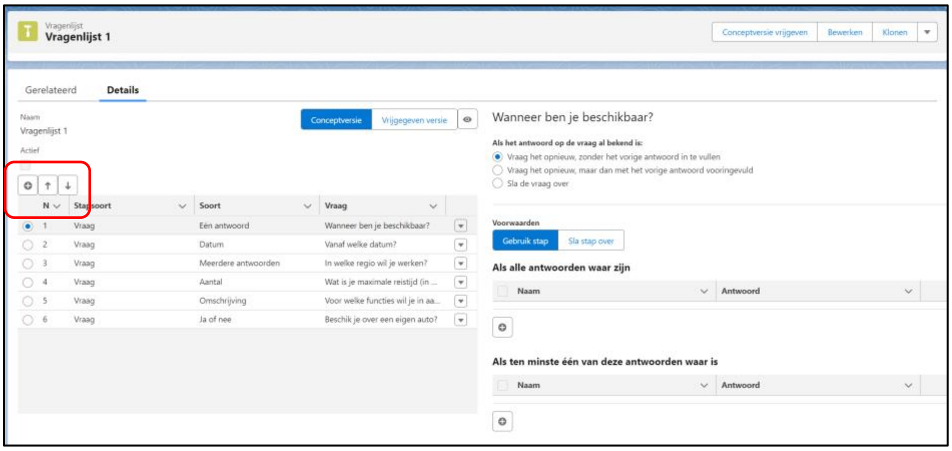


If you record a questionnaire, you can choose from a published questionnaire:



Setting conditions

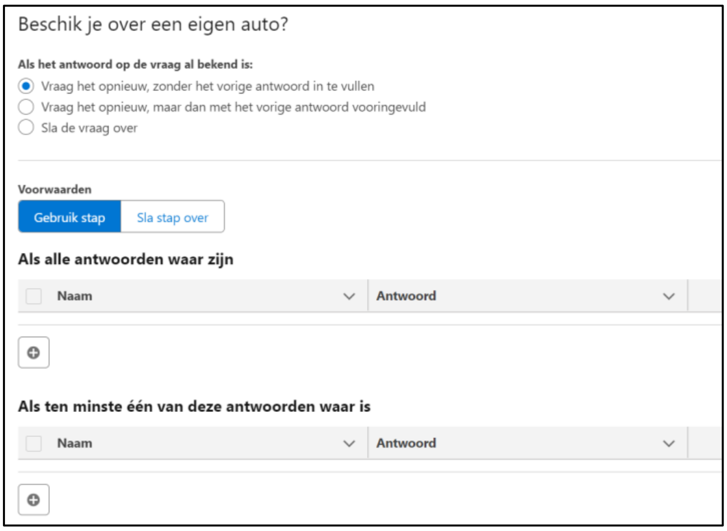
If you have added multiple questions to your questionnaire, you can set up answer conditions and conditions:



You can change the order of the questions in the questionnaire by clicking on the arrows:

If you want to edit or delete a question from the questionnaire, choose it on the right:

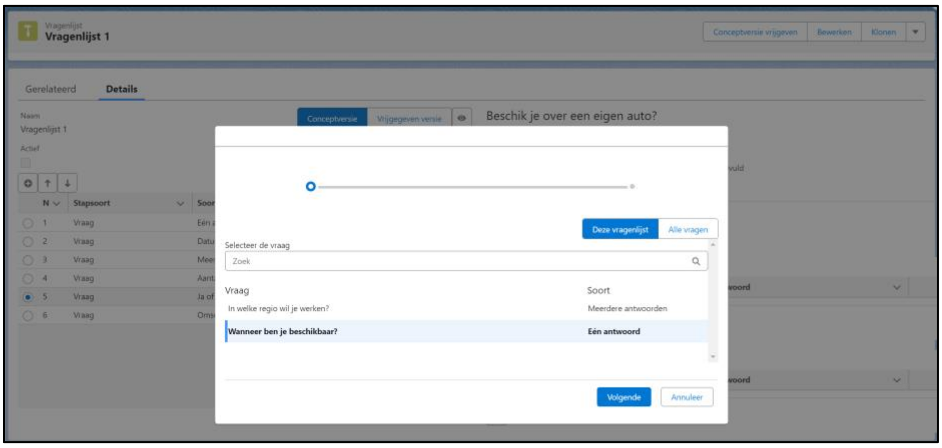
On the right side of the screen, you will see the following options for each question:



If you want to send the same questionnaire more than once, you can decide what you want to do with the answers given earlier. The default option is that a question is always asked again. You can also choose to pre-fill the answer given earlier. Or you choose not to ask the question again.

Below that, you set the conditions that must be met to show or skip a question (step). You choose from all answers are true or one of the answers.

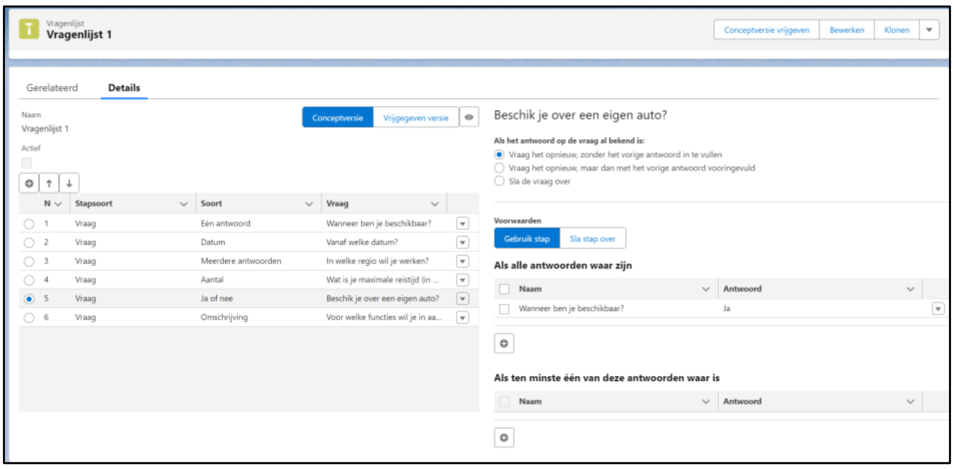
You can only choose questions with single or multiple answers:



At the top right of this screen you can switch between this questionnaire or all questions. You can use this option if you want to set a dependency on the answer given in the (main) questionnaire in a (sub) questionnaire.

Once you've selected the question, choose one of the available answers:

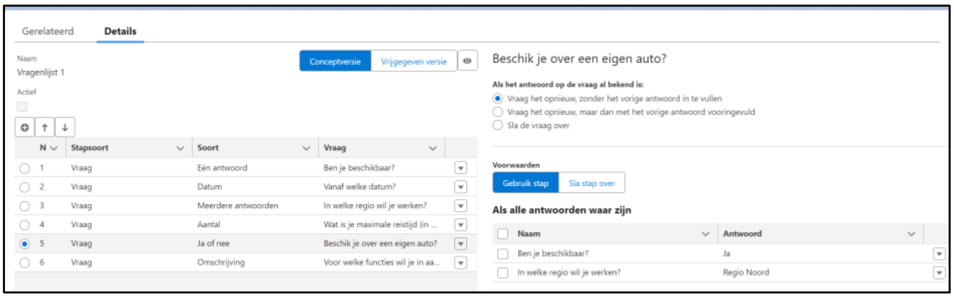
You will then return to this screen:



Mysolution
FEATURE UPDATE

You can switch afterwards to use or skip a step. If you want to switch between the 'all answers' or 'one of the answers' option, you will need to remove the condition and add it again in the appropriate section.

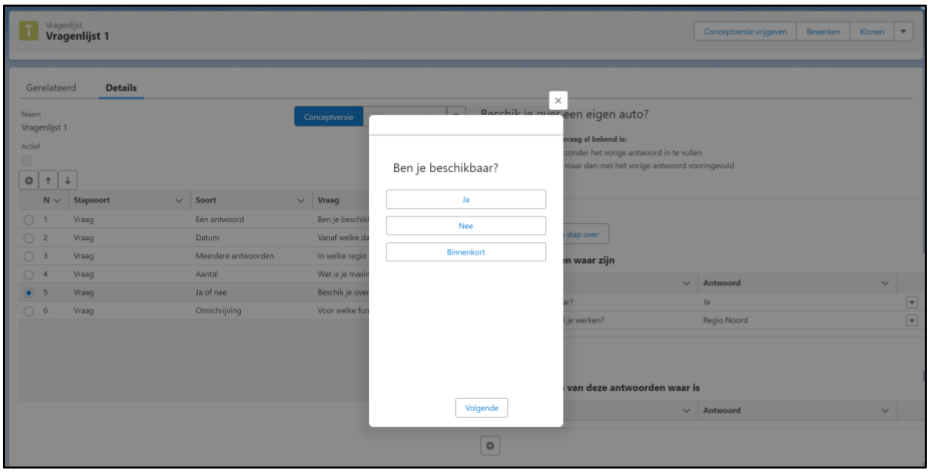
You can also select multiple questions from the answer options:



Questionnaire preview

If you want to check the operation of the questionnaire, press the preview button:

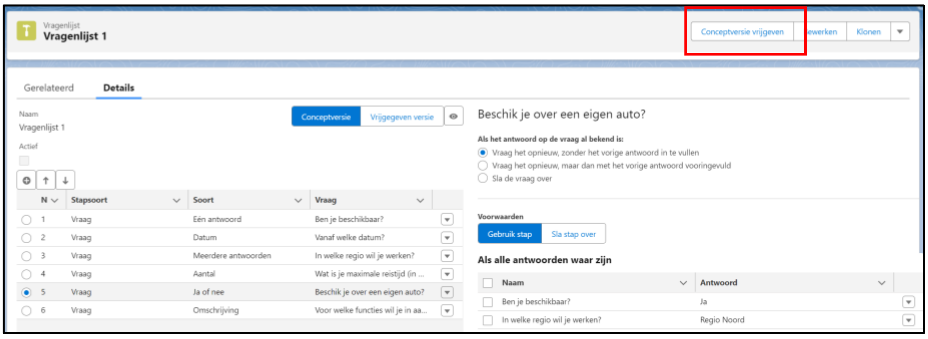
The questionnaire will then be displayed:



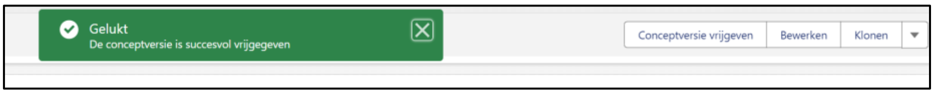
You can navigate through the questions and thus check how they work. Of course, the answers are not stored.

Publish questionnaire

If you are satisfied with the questionnaire, you can publish it using the Release draft version button:



Once it's published, you'll get a notification:

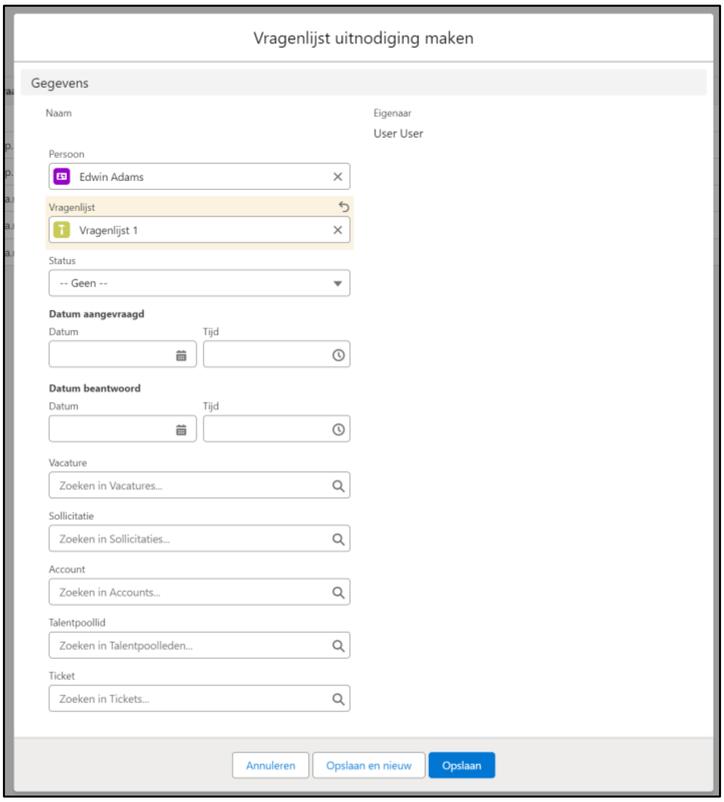


Only published questionnaires will be used in the invitation. You can always edit or add existing questions, but as long as you don't republish the questionnaire, they won't be available.

Answering the questionnaire

Send invitation

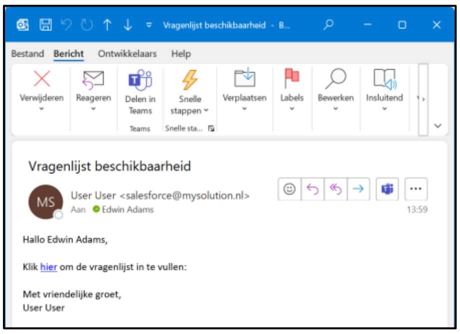
Once the questionnaire has been published, you can send an invitation to the candidate or contact person. In the concept of this module, we assumed that it is created through a Salesforce flow. If desired, you can also create it from the related list 'Questionnaire invitation' on the candidate.



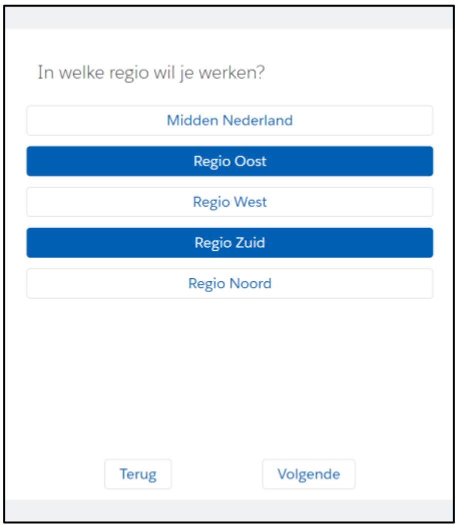
To send the invitation, select the questionnaire and save the record. The status is automatically set to 'Requested'. Once it has been emailed, it will have the status 'Sent'. If you send the invitation through a flow, you can of course link the relevant entities in the invitation. This allows you to easily process the answer in a Mysolution Recruitment object via another flow, for example the person, the vacancy, application, account or a talent pool. You can also link a ticket.

Answers by the candidate

The candidate will receive an e-mail or SMS with a link to the portal:

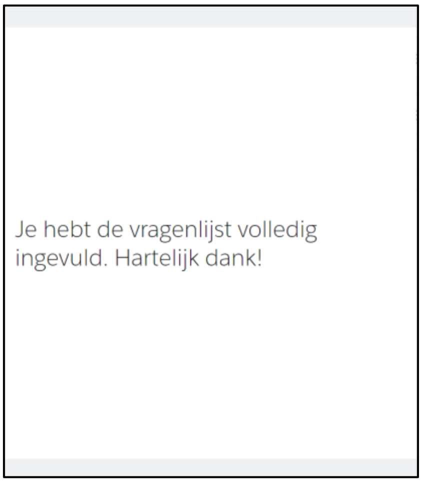


When the link opens, you will be taken to the questionnaire:



With 'Next' you navigate to the next question. Of course, you can also navigate to a 'Previous' question again.

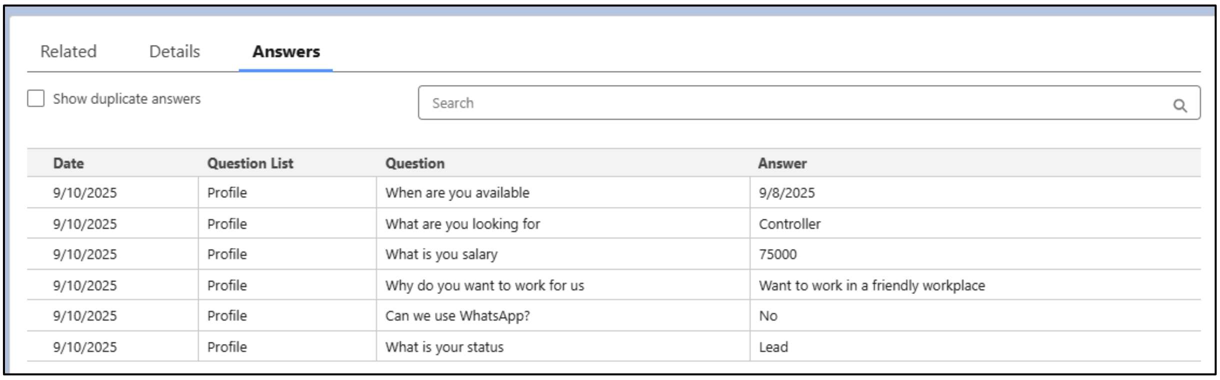
When all questions have been answered, the thank you page will be displayed:



When all questions have been answered, the questionnaire invitation is updated with a response date and the status is updated:

Viewing the answers

On the screen component you can immediately see the last answers given. If the same questions have been asked multiple times, you can check the option 'Show duplicate answers'.



Date	Question List	Question	Answer
9/10/2025	Profile	When are you available	9/8/2025
9/10/2025	Profile	What are you looking for	Controller
9/10/2025	Profile	What is you salary	75000
9/10/2025	Profile	Why do you want to work for us	Want to work in a friendly workplace
9/10/2025	Profile	Can we use WhatsApp?	No
9/10/2025	Profile	What is your status	Lead