Using QwikScore

QuickScore is a Salesforce based survey utility. With it you can create surveys that allow your users to answer a number of custom numeric ranking and freeform text fields. Groups and questions can be weighted and sequenced in any order. Included is an easy to use application that allows a user to take any survey and input their answers using an intuitive interface. Users can save and edit their answers until they submit their score card for grading, at which point the score card becomes locked and may no longer be edited. The survey object provides several helpful aggregations that allow you to see how it is doing by seeing several different data points.

To being creating your new survey, log into Salesforce. Change to the QwikScore app using the app chooser. Click the QwikScore surveys link. Create a new survey and enter a name and description. You may also link it to an opportunity at this time.

After that, create your question groups. Each question group has a name and a weight. This is expressed as a percentage. When all totaled all question groups should equal 100. You may also enter a sequence number that will control in what order this group is displayed to the user when answering questions.

Now you may add questions to your groups. Enter a name for each question (the name is not displayed to the user. It may be good to develop a naming convention for your questions). Then you will enter some text to display to the user that explains the question and whether the question is numeric or free form. Each question also has a weight that can be configured. This again is a percent (probably between 0 and 100, but does not have to be).

Once you have entered all your questions, your survey is available to be taken by users. Simple provide them the link that is displayed on the survey object. Any authenticated Salesforce user can take the survey. It may be a little slow for the user the first time they load the survey as all the question answers and scorecard have to be created behind the scenes. After it is finished created the records, the user is shown a simple table with the questions and sliders that they can adjust to input a values. Free form text fields are also displayed for text questions. Users may work and save their progress and come back to it at a later time. When they have completed their survey they will click ‘Finish and grade’ which will then lock their survey responses, finalize their scorecard and include their data in the survey totals on the survey object.

Each scorecard has a simple final score field for easy review of the card, as well as a link to a detailed report which will show their answers broken down by group.

Bonus Features

* Nifty slider UI element for scoring questions. Easier than typing numbers. More fun too!
* Configurable minimum and maximum values for surveys. Questions can have their own unique minimum and maximum values (all questions must have same upper and minimum max for proper scoring though).
* Ability to activate and deactivate survey.
* Multiple counters on the survey object to help track setup and completion progress.
* Custom button to regrade survey if answers change outside the tool.
* Validation rules make sure all questions are answered before scoring a card.