

Release Note:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1p000000kfRg>

Version: 2.524

Summary

In-Gage currently has 5 profiles which are as follows:

- Agent
- Manager
- QA Manager
- Quality Profile
- Senior Manager

These profiles contain various custom objects/fields settings and tab settings which are applied to the org's profiles at the time of installation (as per the requirements).

We are introducing permission sets now which will map these settings to users specifically. These permission sets contain the same settings as their respective profiles. Multiple permission sets can also be assigned to a single user. These permission sets are as below:

- In-Gage Agent Profile PS
- In-Gage Manager Profile PS
- In-Gage QA Manager Profile PS
- In-Gage Quality Profile PS
- In-Gage Senior Manager Profile PS

Apart from the various custom objects/fields settings and tab settings, the sending of survey also depends upon the profiles. Send NPS Survey or Send Opportunity Won Survey must be checked for the respective case or opportunity (which is being closed or marked as Closed Won respectively) owner's profile Survey Setting (within the Custom Settings) in order to send survey.

Action	Setup Owner	Send Employee Engagement Survey	Send NPS Survey	Send Opportunity Won Survey
View Edit Del	System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Edit Del	Agent	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Edit Del	Senior Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View Edit Del	Team Lead	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Now 2 new Permission Sets have been introduced which can be assigned to any user to skip this creation of survey setting for specific profiles. These permission sets can be assigned to users instead of creating a survey setting record for their respective profiles and checking/unchecking the Send NPS Survey or Send Opportunity Won Survey. The names of these 2 permission sets are as below:

- In-Gage NPS Survey Eligible PS
- In-Gage Opportunity Won Survey Eligible PS

Changes required by you

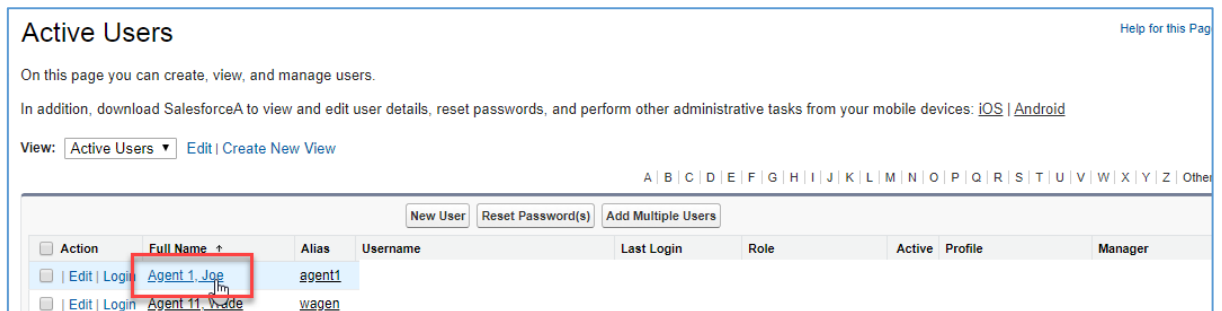
The new functionality is not going to disturb the existing permissions unless the users are assigned these new permission sets.

Users can assign the new permission sets to the users by following the steps below

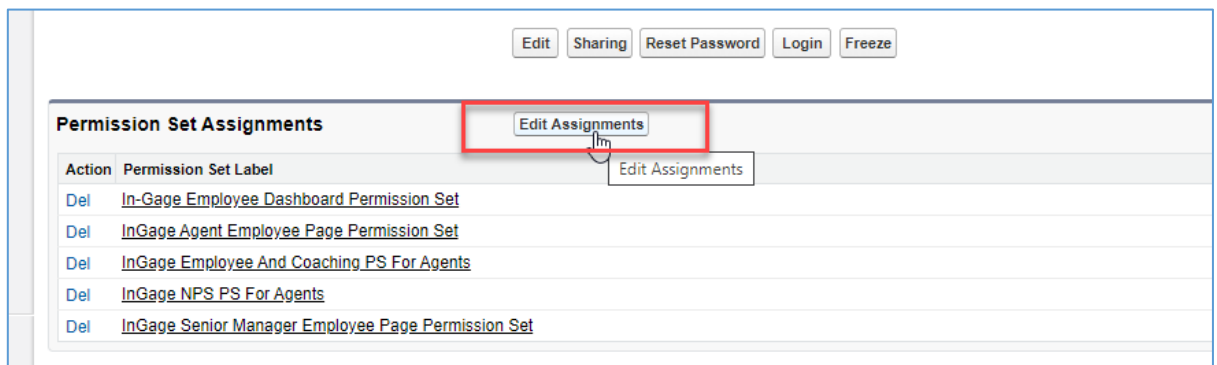
1. Open Setup and type users in the Quick Find box.



2. Click on the user record who requires extra permissions.



3. Scroll down and click on Edit Assignments button in the Permission Set Assignments section.



4. Click on the desired permission set and click on Add button. Then click Save.

Permission Set Assignments
Joe Agent 1

Save Cancel

Available Permission Sets		Enabled Permission Sets
In-Gage API Training Permission Set		In-Gage Employee Dashboard Permission Set
In-Gage Agent Profile PS	Add	InGage Agent Employee Page Permission Set
In-Gage Full Quality Permission Set	▶	InGage Employee And Coaching PS For Agents
In-Gage Manager Profile PS	▶	InGage Manager Employee Page Permission Set
In-Gage QA Manager Profile PS	▶	InGage NPS PS For Agents
In-Gage Quality Analyst Permission Set	▶	InGage Quality Manager Employee Page Permi
In-Gage Quality Profile PS	▶	
In-Gage Senior Manager Profile PS	▶	
In-Gage Survey Eligible PS	▶	
In-Gage Survey Permission Set	▶	
	Remove	

Save Cancel

Testing required

We strongly recommend you install it into your sandbox (full copy of production) first and complete a full round of testing. When you test in sandbox you can test with training data as we will simply delete anything you send to the model.