

SFDC 11.12.0 Technical Guide

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Data schema (with explanation of fields)

Click this link to view the attached Lucid document: <https://lucid.app/lucidchart/3b8db183-7fc9-48fc-84ce-68d9ffdb6f6c/edit?page=4IBxV2vZrhi5>

List of new custom Objects, Fields and Flow automations

Salesforce instance:

Standard Objects

Contact

API Name	Type	Value
CreatedByConsensus__c	Boolean	TRUE if created by Consensus
existInConsensus__c	Boolean	TRUE if exists in Consensus

Lead

API Name	Type	Value
Uuid__c	Tesxt	Contains the Consensus recipient ID

existInConsensus__c	Boolean	TRUE if exists in Consensus
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Activity

API Name	Type	Value
ExtID__c	Text	External Id to prevent duplication

Custom Objects

Demo

AvgShares__c	(Formula)
AvgViews__c	(Formula)
AvgWatchTime__c	(Text)
DaysSinceLastActivityDemo__c	(Formula)
LastActivityDate__c	(Roll-up Summary)
TotalShares__c	(Roll-up Summary)
TotalViews__c	(Roll-up Summary)
TotalWatchTime__c	(Roll-up Summary)
Total_Watch_Time_HMS__c	(Text)
TotalDemoBoards__c	(Number)

Demo Association

Demo association object is a junction object between DemoBoard and Demo, and it is used to handle the MDS for Salesforce.

Name	(Text)	The name of the related demo
Demo__c	Lookup(Demo)	

DemoBoardName__c	(Formula)	The name of the related demoboard
DemoBoard__c	Lookup(DemoBoard)	
ExtId__c	(Text)	External Id to prevent duplication

DemoBoard

Name	(Auto Number)
DemoBoardName__c	(Text)
Organization_Name__c	(Text)
Subtitle__c	(Text)
Opportunity__c	Lookup(Opportunity)
Contact__c	Lookup(Contact)
Account__c	Lookup(Account)
Lead__c	Lookup(Lead)
Demo__c	Lookup(Demo)
LastDemoActivityDate__c	(Date/Time)
CreationDate__c	(Date/Time)
DaysSinceLastActivity__c	(Formula)
CreatedById	Lookup(User)
LastModifiedById	Lookup(User)
OwnerId	Lookup(User,Group)
TotalWatchTimeHMS__c	(Formula)
TotalWatchTime__c	(Number)
TotalViews__c	(Number)

TotalShares__c	(Number)
TotalInvitations__c	(Number)
AvgDBShares__c	(Formula)
AvgDBViews__c	(Formula)
AvgDBWatchTime__c	(Formula)
DemoBoardUUID__c	(Text)
UserID__c	(Text)
ExtID__c	(Text)
DemoBoardOwner__c	(Text)
TourViews__c	(Number)
HotspotViews__c	(Number)
MarkedAsTest__c	(Boolean)
DetailsURL__c	(URL)
CreationDateFormula__c	(Formula)
OpportunityStage__c	(Text)
InitialOpportunityStage__c	(Text)

Invitation

DemoBoard__c	Lookup(DemoBoard)
SharedByName__c	(Text)
HeatmapURLV11__c	(Formula)
InternalUser__c	(Boolean)
OpportunityStage__c	(Text)
ConvertedOpportunity__c	(Text)
CreationDateFormula__c	(Formula)

SharedByName__c	(Text)
ContactSource__c	(Text)
TotalWatchTimeHMS__c	(Formula)
DemoBoardOwner__c	(Text)

View

DemoBoard__c	Lookup(DemoBoard)
SharedByName__c	Text
Source__c	(Long Text Area)
DurationHMS__c	(Formula)

Feature

ExtId__c	Text
Title__c	Text
Value__c	Text
View__c	Lookup(View)

Apex Scheduled Jobs

Batch job size can be checked with

```
Integer PackageAdmin.getBatchSize(String className)
```

Batch jobs size can be changed to a value between 10 and 500 using `void`

`PackageAdmin.setBatchSize(String className, Integer size)`. Note: Changing the batch size is inadvisable without confirming with Consensus.

DemosUpdateBatch

Job type: Batch

Interval: Every 24 hours, or manually if admin selects “Run Data Update.”

Description: upsert Demo records

API endpoints: 'api/integr/v1.0/demo/search' (all Demos)

Default batch sizes for each request: 200

Which field updating in SFDC (Demo__c)	Which parameters we use from response
ExternalTitle__c	internalTitle
Name	
Type__c	type
uuid__c	uuid
uuidType__c	uuidType
isPublic__c	isPublic
isArchived__c	isArchived
isPublished__c	isPublished
isActive__c	
UserID__c	
Mode__c	
ExtId__c	
PermissionUUID__c	permissions.uuid/folderPermissions.uuid
	createdAt
	description
	folderPermissions.value
	folderPermissions.folderName

DemoRecordsBatch

Job type: Batch

Interval: Every 24 hours, or manually if admin selects “Run Data Update.”

Description: deletes inactive demos. If an inactive demo becomes active again it will update the Demo record.

1. if Demo__c.isActive__c is TRUE, update Demo records.
2. if Demo__c.isActive__c is FALSE, delete Demo records

SalesLeadsUpdateBatch

Job type: Batch

Interval: Every 24 hours, or manually if admin selects “Run Data Update.”

Description:

1. create Contact if externalOpportunityId parameter not empty AND Consensus__c.isCreateContacts__c is checked;
2. create Lead if Consensus__c.isLoadHistoricalActivitySch__c is checked OR type parameter is Sales AND isCreateRecipientsShedul__c is checked;
3. upsert DemoBoard__c records;
4. upsert cInvitation__c records;
5. upsert cView__c If ViewData parameter not empty;
6. upsert cFeature__c If features parameter not empty
7. Upsert Task
8. Upsert ContactRoles if Consensus__c.isCreateContactsRoles__c is checked

API endpoints: 'api/integr/v1.0/report/trackDemoboards'

batch sizes for each request: 100

MarketingLeadsUpdateBatch

Job type: Batch

Interval: Every 24 hours, or manually if admin selects “Run Data Update.”

Description:

1. creates Contact if externalOpportunityId parameter not empty AND Consensus.isCreateContacts__c is checked AND Consensus.isCreateLeadsSchedul__c is not checked;
2. creates Lead if Consensus__c.isLoadHistoricalActivitySch__c is checked OR type parameter is Marketing AND isCreateLeadsSchedul__c is checked;
3. upsert DemoBoard__c records;
4. upsert cInvitation__c records;

5. upsert cView__c If ViewData parameter not empty;
6. upsert cFeature__c If features parameter not empty
7. Insert Task
8. Upsert ContactRoles if Consensus__c.isCreateContactsRoles__c is checked

API endpoints: 'api/integr/v1.0/marketing/searchleads'

batch sizes for each request: 150

Contact Object

Which field updating in SF (Contact__c)	Which parameters we use from response
Email	email
	externalOpportunityId
	type
firstName/lastName	name
Title	title
AccountId	externalAccountId
CreatedByConsensus__c	

Lead Object

Which field updating in SF (Lead__c)	Which parameters we use from response
	creationDate
Email	email
	type
firstName/lastName	name
Company	organization
email	email
Title	title
Uuid__c	contactUuid

Phone	
Country	
State	
Description	
LeadSource	
existInConsensus__c	

Invitation Object (Custom)

Which field updating in SF (cInvitation__c)	Which parameters we use from response
Demo__c	demoUuid
CreationDate__c	creationDate
DaysSinceLastActivity__c	timeLastView
Email__c	email
Hash__c	hash
Mode__c	
Primary__c	invites.primary
SendDemoHash__c	senddemoHash
SendDemoUuid__c	senddemoUuid
DemoBoardOwner__c	ownerName
ContactSource__c	invites.sharedByName
AssignedToOpp__c	
Opportunity__c	externalOpportunity.externalOpportunityId
ConvertedOpportunity__c	
OpportunityStage__c	
HeatmapURL__c	
DetailsURL__c	senddemoUuid + ...

Shares__c	shares
TimeLastView__c	timeLastView
TotalViewTime__c	viewTime
Type__c	
UserId__c	
Uuid__c	senddemoUuid+hash
Views__c	invites.views
Extid__c	
InternalUser__c	isTest
Contact__c	
Lead__c	

DemoBoard Object (custom)

Which field updating in SF (cDemoBoard__c)	Which parameters we use from response
Organization_Name__c	Organization
DemoBoardName__c	demoboardName
Demo__c	demoUuid
CreationDate__c	creationDate
DemoBoardUUID__c	senddemoUuid
Opportunity__c	externalOpportunity.externalOpportunityId
Account__c	externalOpportunity.externalAccountId
Extid__c	senddemoUuid + ...
MarkedAsTest__c	isTest
Subtitle__c	opportunity
HotspotViews__c	totalHotspotOpened
TourViews__c	totalTourViews

InitialOpportunityStage__c	
----------------------------	--

Demo Association Object (custom)

Which field updating in SF (DemoAssociation__c)	Which parameters we use from response
DemoBoards__c	Parent DemoBoard Id
Demo__c	Related Demo Id
Name	Demo Name
ExtId__c	demoboard.DemoBoardUUID__c + '_' + demo.uuid__c

View Object (custom)

Which field updating in SF (cView__c)	Which parameters we use from response
Demo__c	invites.viewData.demoUuid
Duration__c	invites.viewData.duration
Files__c	invites.viewData.files
Replay__c	invites.viewData.isReplay
linkUuid__c	invites.viewData.linkUuid
ViewId__c	invites.viewData.viewId
ViewDate__c	invites.viewData.dateView
selectedDemoUuid__c	invites.viewData.selectedDemoUuid
Uuid__c	invites.viewData.viewId + ...
	features
	Viewid
	demoTitle
Invitation__c	

Feature Object (custom)

Which field updating in SF (cFeature__c)	Which parameters we use from response
Name	invites.viewData.features.uuid
Value__c	invites.viewData.features.value
Title__c	invites.viewData.features.title
ExtId__c	invites.viewData.viewId + '-' + invites.viewData.features.uuid + '-' + ...

Task Object

Which field updating in SF (Task)	Which parameters we use from response
Priority	
Status	
Subject	.. + viewData.demoTitle + ...
Description	... _ invites.name + invites.email + invites.organization + invites.title + viewData.demoTitle + ...
ActivityDate	invites.timeLastView
OwnerId	
WhoId/WhatId	
ExtId__c	viewData.demoTitle + '#' + invites.timeLastView + '#' + invites.contactUuid

Opportunity Contact Role Object

Which field updating in SF (OpportunityContactRole)	Which parameters we use from response
OpportunityId	
ContactId	
Role	

RecentDemosUpdateBatch

Job type: Batch

Interval: Set on Configuration page

Description: upsert Demo records which was created today

API endpoints: 'api/integr/v1.0/demo/search' (all Demos)

Batch sizes for each request: 500

The same fields as DemosUpdateBatch are updated

RecentDemoBoards

Job type: Batch

Interval: Set on Configuration page

Description:

Filters based on activity of Today's Date. Runs at desired interval set on the configuration page.

1. create Contact if externalOpportunityId parameter not empty AND
Consensus__c.isCreateContacts__c is checked;;
2. create Lead if Consensus__c.isLoadHistoricalActivitySch__c is checked OR type parameter is
Sales AND isCreateRecipientsShedul__c is checked;
3. upsert DemoBoard__c records;
4. upsert cInvitation__c records;
5. upsert cView__c If ViewData parameter not empty;
6. upsert cFeature__c If features parameter not empty
7. Upsert Task
8. Upsert ContactRoles if Consensus__c.isCreateContactsRoles__c is checked
9. update cDemo__c fields (TotalDemoBoards__c, AvgWatchTime__c,
Total_Watch_Time_HMS__c)
10. Update OpportunityStage__c field on cDemoBoard__c records
11. Update OpportunityStage__c field on cInvitation__c records

API endpoints: 'api/integr/v1.0/report/trackDemoboards'

Batch sizes for each request: 100

The same fields as SalesLeadsUpdateBatch are updated + following analytics fields

Analytics fields:

cDemo__c.TotalDemoBoards__c

cDemo.Total_Watch_Time_HMS__c

cDemo__c.AvgWatchTime__c

cDemoBoard__c.OpportunityStage__c

cInvitation__cOpportunityStage__c

Flow Automations:

All flows are currently Deprecated. Due to limitation of flows in Salesforce managed packaged they are deployed active, but can be safely deactivated. Even active no performance impact is expected.

1. Consensus DemoBoard Opp Stage Capture (DEPRECATED)
2. Consensus Invitation Metrics DemoBoard Rollup (DEPRECATED)
3. Consensus Invitation Opp Stage Capture (DEPRECATED)
4. DemoBoard Account Rollup (DEPRECATED)
5. DemoBoard Opportunity Rollup (DEPRECATED)
6. Invitation Metrics Contact Rollup (DEPRECATED)
7. Invitation Metrics Lead Quick Rollup (DEPRECATED)
8. Invitation Metrics Lead Rollup (DEPRECATED)
9. Invitation to DemoBoard Association (DEPRECATED)
10. Invitation to DemoBoard Quick Association (DEPRECATED)

Trigger Automations:

Triggers shouldn't be disabled without consulting Consensus. All Consensus triggers can be disabled from the Configuration - Advanced Options. Can also be disabled only for a list of users (at most 5)

Advanced Options



Changing these options may impact Consensus data synchronisation process!

- ☒ Disable Account trigger
- ☒ Disable Contact trigger
- ☒ Disable Opportunity trigger
- ☒ Disable Lead trigger
- ☐ Disable DemoBoard trigger
- ☐ Disable Invitation trigger
- ☐ Disable Feature trigger
- ☐ Disable View trigger
- ☐ Disable Error Log trigger
- ☐ Disable Batch Error trigger
- ☒ Selected triggers are disabled only for following User Ids

User Ids (18 character IDs separated by semicolon)

Account

This is currently a deprecated trigger. Disabled - No effect

Contact (before update)

When Contact email is changed related invitations are deleted. Disabled - In some cases Invitations may double depending on the configuration options.

Opportunity

This is currently a deprecated trigger. Disabled - No effect

Lead (before update)

When Lead email is changed related invitations are deleted. If Lead is converted Invitations to it are redirected to the created Contact. Disabled - In some cases Invitations may double depending on the configuration options.

DemoBoard (before insert, before update, after insert, after update)

- On before insert the trigger sets the Initial Opportunity Stage field - this field should be set only when the demoboard with opportunity record is created in Salesforce and not changed after that.
- On before update the trigger handles the opportunity change in Consensus and update the Initial Opportunity Stage field if needed.
- On after update the trigger handles the opportunity change in Salesforce and make a callout to Consensus to updated this change and updates the related Invitations to the DemoBoard in Salesforce with the same change.

Invitation (before update, after insert, after update, after delete, after undelete)

- Set value ChildRecordUpdateDate__c field on related Leads to System.now().

- Recalculates rollup fields on the DemoBoard object - TotalInvitations__c, TotalViews__c, TotalWatchTime__c, TotalShares__c.

Feature (before update)

Set value ChildRecordUpdateDate__c field on related Views to System.now(). Disabled - ChildRecordUpdateDate__c would no longer be updated.

View (before update)

Set value ChildRecordUpdateDate__c field on related Invitations to System.now(). Disabled - ChildRecordUpdateDate__c would no longer be updated.

Error Log (after insert)

Creates ErrorLog__c records when Consensus debug mode is active when batch jobs from the package fail. Disabled - ErrorLog__c records wont be created.

Permission Sets & Permission Set Groups :

Here is a summary of the included permission sets and groups within our managed package. For all integrations to work it is advisable to assign Permission Set groups depending on the user profile, as they contain both custom & standard permissions. Alternatively you can use only permissions sets - Assign 'Consensus Users' and 'Consensus Users (Standard)' for normal users, and 'Admin Consensus' and 'Admin Consensus (Standard)' for Admin users.

Permission Sets:

1. Consensus User - DEPRECATED
2. Consensus Users - Contains permissions for custom objects and custom fields
3. Consensus Users (Standard) - Generated on package install. Contains permissions for standard objects and fields.
4. Admin Consensus - Contains permissions for custom objects and custom fields
5. Admin Consensus (Standard) - Generated on package install. Contains permissions for standard objects and fields.
6. Integration Consensus - Contains permissions for custom objects and custom fields. Designed for Salesforce Integration profile.
7. Marketing Consensus - DEPRECATED
8. Sales Consensus - DEPRECATED

Permission Set Groups:

1. Consensus Admin Group - Generated on package install. Contains 'Admin Consensus' and 'Admin Consensus (Standard)'
2. Consensus User Group - Generated on package install. Contains 'Consensus Users' and 'Consensus Users (Standard)'
3. Consensus Integration Group - Generated on package install. Contains 'Integration Consensus' and 'Admin Consensus (Standard)'

Consensus Users

Application

Consensus (Consensus_Lightning)

Consensus (Consensus)

Classes

Activity

BatchUpdateUserInfo

cGateway

cIntegrationService

cInvitationTriggerHandler

cInvitationType

ConfigurationLwcController

ConsensusSettings

CreateDemoboardController

cUtils

DataUpdateService

DateUpdateTriggerHandler

DemoManager

DemoRecordsBatch

DemosController (DEPRECATED)

DemosUpdateBatch

DemoWebHook

EmailSendController (DEPRECATED)

ErrorHandler

Heatmap (DEPRECATED)

HeatmapController (DEPRECATED)

IntegrationManager

IntegrationManager1

IntegrationManager2

InvitesComponentController (DEPRECATED)

LeadContactUpdateHandler

LoggerService

MarketingLeadsUpdateBatch

PackageAdmin

Permissions

PostInstallClass

RecentDemoBoards

RecentDemosUpdateBatch

RecentDemosUpdateScheduler

RecipientsInfo

Recommendations

RelatedViewsController

SearchController (DEPRECATED)

Custom objects

Consensus Users Info

Tab: Visible

Object: Read

Field Read Access: All fields

Field Edit Access: Consensus UUID, selected Email Template

DemoBoards

Tab: Visible

Object: Read, Create

Field Read Access: All fields

Demo Association

Tab: Hidden

Object: Read, Create

Field Read Access: All fields

Demo

Tab: Visible

Object: Read

Field Read Access: All fields

Feature

Tab: Visible

Object: Read

Field Read Access: All fields

Invitation

Tab: Visible

Object: Read, Create

Field Read Access: All fields

View

Tab: Visible

Object: Read

Field Read Access: All fields

Standard objects

Contact

Field Edit Access: First Name, Last Name, Title, Email, existInConsensus, Created by Consensus

Lead

Field Edit Access: Address, ChildRecordUpdateDate, Description, Email, existInConsensus, Lead Source, Loading Historical Data Status, Phone, Title, UUID

Task

Field Edit Access: Comments, Due Date, ExtID, Name

VisualForce Page

Demo_Account_Page

Demo_Contact_Page

Demo_Lead_Page

Demo_Opportunity_Page

Email_Send_Page (DEPRECATED)

Heatmap_Page (DEPRECATED)

System Permissions

Access Activities

Edit Tasks

View Reports in Public Folders

View All Custom Settings

Consensus Admin

Consensus Admin permission provides full access to the package metadata. It is designed for an admin users to manage the app. Additionally there some standard permission included on post install script:

Standard objects

Account

Field Read Access: Industry and Number of Employees

Contact

Field Edit Access: First Name, Last Name, Title, Email, existInConsensus, Created by Consensus

Field Read Access: AccountId

Lead

Field Edit Access: Address, ChildRecordUpdateDate, Description, Email, existInConsensus, Lead Source, Loading Historical Data Status, Phone, Title, UUID

Field Read Access: Phone, Address

Opportunity

Field Read Access: Amount, AccountId, Type, Probability

Task

Field Edit Access: Comments, Due Date, ExtID, Name

System Permissions

Edit Tasks

View Reports in Public Folders

View All Custom Settings

Access Activities

View All Users

Author Apex

Modify Metadata Through Metadata API Functions

View Setup and Configuration

View Roles and Role Hierarchy

Consensus Integration

Consensus Integration permission set is cloned from the Consensus Admin and removed the access to all UI elements. It is designed for Salesforce Integration profile which has strong limitation to the Salesforce UI. The permission set has the same permissions as the Consensus Admin except the UI access.

Methods of synchronizing data

Schedulers ⓘ

☒ 1. Create new Lead in Salesforce for Consensus Leads ⓘ

☒ 2. Create new Lead in Salesforce for Consensus Recipients ⓘ

☒ 3. Create new Contact in Salesforce for Opportunity synced DemoBoards ⓘ

☒ 4. Create new Contact Role ⓘ

☒ 5. Update existing Contacts / Leads ⓘ

☒ 6. Upload Historical Consensus Data (create Leads and Recipients) ⓘ

Sync DemoBoard data from ⓘ

Time interval for recent Data Sync ⓘ

Time interval for full Data Sync ⓘ

Enable Task Creation ☒ Active

Run Data Update Run Permission Update

Run Data Update button

Order of Operations:

1. Send request to /demo/search for first 500 demos.
2. Receive response.
3. Parse response with received demos.
4. Save demos to Salesforce.
 - a. Existing demos will be updated only if there are any updates. (They will not be recreated)
5. Repeat 1-5 steps until the end of the demos list.
6. Send request to /report/trackDemoboards for first 100 demoBoards.
7. Receive response.
8. Parse response with received recipients.
9. Save recipients to Salesforce.
 - a. Existing recipients will be updated only if there are any updates. (They will not be recreated)
10. Repeat 6-9 steps till end of Recipients list.
11. **Send request to /marketing/searchleads for first 150 demoBoards.**
12. Receive response.
13. Parse response with received leads.
14. Save leads to Salesforce.
 - a. Existing leads will be updated only if there are any updates. (They will not be recreated)

15. Repeat 11-14 steps till end of Leads list.

NOTE: Leads and Recipients from Consensus are both saved as Leads in Salesforce.

Schedulers

Steps:

1. Every X minutes the RecentDemosUpdateBatch apex jobs will fetch data from Consensus
 - a. Send request to /demo/search for first 500 demos.
 - b. Receive response.
 - c. Parse response with received demos.
 - d. Save demos to Salesforce.
2. Every X minutes the RecentDemoBoards apex jobs will fetch data from Consensus
 - a. Send request to /report/trackDemoboards for the first 100 demoBoards.
 - b. Receive response.
 - c. Parse response with received recipients.
 - d. Save recipients to Salesforce.
3. Every 24 hours send request to /report/trackDemoboards and /marketing/searchleads to true up any date that may have not been synced during the last day.
 - a. Send request to /report/trackDemoboards for first 100 leads.
 - b. Receive response.
 - c. Parse response with received recipients.
 - d. Save recipients to Salesforce.
 - e. Repeat till end of Recipient list.
 - f. Send request to /marketing/searchleads for first 150 leads.
 - g. Receive response.
 - h. Parse response with received leads.
 - i. Save leads to Salesforce.
 - j. Repeat till end of Leads list.
4. Every 24 hours (1 time in a day) send request to /info/userinfo for updating Consensus User Info table with UserUUID and UserGroupUUID.

Schedulers features:

1. Sync DemoBoard data from - date picker input. If blank the schedulers will syn all the data during the daily sync. If a date selected the sync process will sync only the DemoBoard data created after the selected date. This features is designed for orgs with large amount of Consensus data needs to be synced;

2. Time interval for recent Data sync - integer input. Set how often the Recent data sync batches will be executing as 10 minutes is the minimum value and 240 is the maximum value for this input (the default value is 10);
3. Time interval for full Data sync - integer input. Set how often the Daily sync data batches will be executing as 1 is the minimum value and 7 is the maximum value for this fields (default is 1 - full sync data will run once per day).
4. Enable Task Creation - checkbox. If active a task records will be created, If inactive no tasks will be created in the org (active is the default value).

The RecentDemosUpdateBatch scheduled apex job will only start running as configured once a successful full sync of data has been processed by running the manual “Run Data Update” button on the configuration page.

Webhooks

Steps:

1. After event happened (We have 2 events: Demo watched (Recipient) and New lead (Lead))
2. Consensus side sends response with information.
3. Salesforce side parses this information.
4. Creates new lead.
5. Saves information to created lead.

For creating Lead via Webhook:

1. For demo_watched event the following fields are set on the Lead record:
 - a. Email
 - b. FirstName
 - c. LastName
 - d. Title
 - e. Company
 - f. existInConsensus__c is set to *true*

```

{
  "demo": {
    "uid": "a78c848-5d8d-4541-a88e-1b336fc2054a",
    "title": "Pavel single demo",
    "ids": []
  },
  "recipient": {
    "email": "hoharevich@gmail.com",
    "first_name": "pavel",
    "last_name": "hoharevich",
    "title": "",
    "organization": "Pavel test"
  },
  "sender": {
    "email": "sokolovsky.p@mail.ru",
    "first_name": "pavel",
    "last_name": "sokolovsky"
  },
  "message": {
    "subject": null,
    "body": null,
    "date_sent": "2020-08-20T11:39:27+0000"
  },
  "send_demo": {
    "uid": "c55833a7-0fad-485d-a2b7-65cb9b20d31a",
    "hash": "a807bfe0"
  },
  "invite": {
    "uid": "64184e3-f6db-4a5a-855d-cf17b16738a",
    "hash": "a807c094"
  },
  "data_watched": "1920-08-25T11:39:27+0000",
  "csrf_token": "random",
  "control_key": "813a661458617810a8f6075c5074b642",
  "webhook_type": "demo_watched"
}

```

2. For new_lead event the following fields are set on the Lead record:

- a. Email
- b. FirstName
- c. LastName
- d. Title
- e. Company
- f. existInConsensus__c is set to *true*
- g. Country
- h. State
- i. Phone
- j. Description

```

{
  "firstName": "fName",
  "lastName": "lName",
  "email": "test@yopmail.com",
  "confirmEmail": "test@yopmail.com",
  "phoneNumber": "+3210",
  "organization": "org",
  "title": "title",
  "country": "AF",
  "state": "BGL",
  "comments": "com",
  "session": {
    "v": "a0cf81d5-876d-4c21-a3bb-6cd614e0485f",
    "u": "5884a296-50d3-40fb-827f-91d5bd2bd8c1",
    "i": "HTkyLJE20C4xLjMy",
    "eu": 0,
    "nostat": 0
  },
  "uid": "9fa58a8b-0ade-40f9-83be-65c6f653d02",
  "utm_params": [],
  "demo": {
    "uid": "e744134c-65d3-4541-b8fc-9eeb7352a5cc",
    "title": "SAR Standart (Public)",
    "ids": []
  },
  "5f44cde04cc43": "random",
  "control_key": "813a661458617810a8f6075c5074b642",
  "webhook_type": "new_lead"
}

```

By Webhooks only Lead will be created, without additional information about Demo was watched.

Additional information about Demo name/Feature rating and others are requested a little bit later via Schedulers if they are running. (or via Run Data Update button)

Create Demoboard

After click on “Create DemoBoard” button from the Consensus component:

1. A modal opens the Consensus plugin through iframe, where the user can create Demoboard directly in Consensus;
2. All the DemoBoards are created back to Salesforce with the batch sync process (Run Data Update from Configuration page).

Related functionalities around “Create DemoBoard”:

1. When the user log in through the iframe in Consensus, the system creates a User Info table record;
2. If the creation of the DemoBoard is initiated from account or opportunity record, the user can select a recipients from the related contacts list;
3. When the iframe is loaded we're passing some data with query parameters to be pre-populated in Consensus:
 - a. source - the DemoBoard creation source (“sfdc”);
 - b. accountId - if the DemoBoard creation is NOT initiated from a lead record;
 - c. accountName - same as b.;
 - d. opportunityId - if the DemoBoard creation is initiated from Opportunity record;
 - e. opportunityName - same as d.;
 - f. contacts - based on the target record it contains all related contacts for account or opportunity, or contact, or lead.
4. When the user click on “Create Demoboard” in the iframe/plugin we receive an event with the organization value and all the recipients added to the demoboard in Consensus (this is in case the user change the pre-populated recipients);
5. When the user click on Insert Button/Link/Thumbnail in the iframe/plugin we receive an event with the Demoboard link and we redirect the user to Send Email global action with pre-populated email template within the DemoBoard link and the recipients;

CRM Sync

CRM Sync is the functionality to get accounts, opportunities and contacts during DemoBoard creation in Consensus. We are using Local Connected App/External Client App with OAuth settings to authorize the user and get the data from Salesforce. Only one admin user for both systems - Consensus and Salesforce, can connect/authorize and all other Consensus users can

get the data on behalf of this user. Record visibility is applied so each user can see only the data it has access to.

CRM Sync flow:

1. Initiate the connection from Consensus - Integrations → Salesforce → Connect;
2. Type the Salesforce URL from which account and opportunities should be selected;
3. Allow the scopes of our Connected App;
4. If no errors the connection will be setup properly and an access token will be saved in Consensus;
5. All Consensus users in this environment should be able to select account and opportunity during DemoBoard creation.

NOTE: For a user with different email between Consensus and Salesforce, User Info records should be created to match the emails between the systems, otherwise selecting account and opportunity during the DemoBoards creation won't work.

Opportunity Recommendations

Opportunity Recommendations is a functionality to automatically select the best opportunity for the DemoBoards during creation in Consensus. The flow fires every time a recipient is added on the DemoBoard and tries to find the best opportunity based on several rules. If such opportunity is found it is automatically pre-populated on the DemoBoard.

Opportunity Recommendation rules:

Find all contacts by email in Salesforce and get all opportunities linked to this contacts, then the result list filter by account(if selected), by Is Primary contact, then by opportunity stage (probability), then by opportunity created date (desc). Pre-select the first one from the list.

Report Types

- Consensus Contacts (Accounts & Contacts category) - includes fields from objects: Contacts, Invitations, Views, Features;
- Consensus DemoBoards (Other Reports category) - includes fields from objects: DemoBoards, Invitations, Views, Features;
- Consensus Leads (Leads category) - includes fields from objects: Leads, Invitations, Views, Features;

- Consensus Opportunities (Opportunities category) - includes fields from objects: Opportunities, DemoBoards, Invitations, Views;
- Consensus Recipients (Lead category) - includes fields from Invitation object;
- Consensus Views (Other Reports category) - includes fields from View object;

Reports

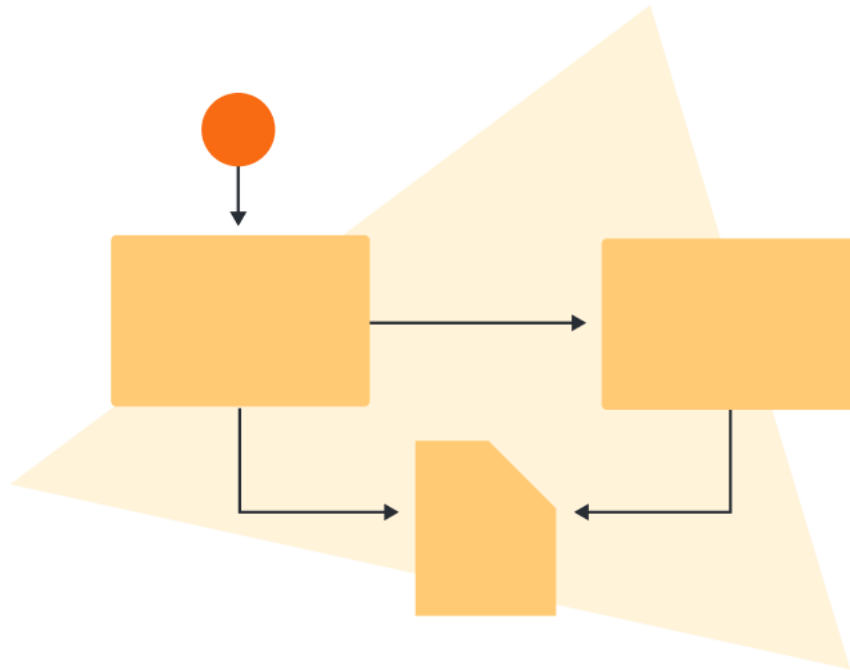
- Best Demos List - shows a list of demos with Total DemoBoards, Total Views and Total Shares columns;
- Consensus Demo Views - shows a list of views grouped by DemoBoards;
- Consensus Pipeline Influence - shows Sum Amount of all OPEN Opportunities where Consensus was used with at least 1 VIEWED DemoBoard;
- Consensus Recipients Demolytics - shows Demolytics data for the Consensus recipients grouped by Account;
- Consensus View Timeline - shows views data by created date;
- DemoBoards Sales Demolytics - shows DemoBoard Demolytics data grouped by with/without views for comparison
- Total DemoBoards Created - shows all DemoBoards grouped by Opportunity;
- Monthly Recipients Report - shows demos with invitations list;
- Opportunities w/ DemoBoards Report - shows opportunity with DemoBoards;
- Consensus Won ARR/ACV - shows Sum Amount of CLOSED WON Opportunities where Consensus was used with at least 1 VIEWED DemoBoard;
- Non-Consensus Won ARR/ACV - shows CLOSED WON Opportunities where Consensus did NOT have any influence. 0 views and 0 view time;
- Closed Opportunity Report- shows closed opportunities grouped by with/without views for comparison;
- User Sales Demolytics - shows Demolytics data by DemoBoard owner.

Dashboards

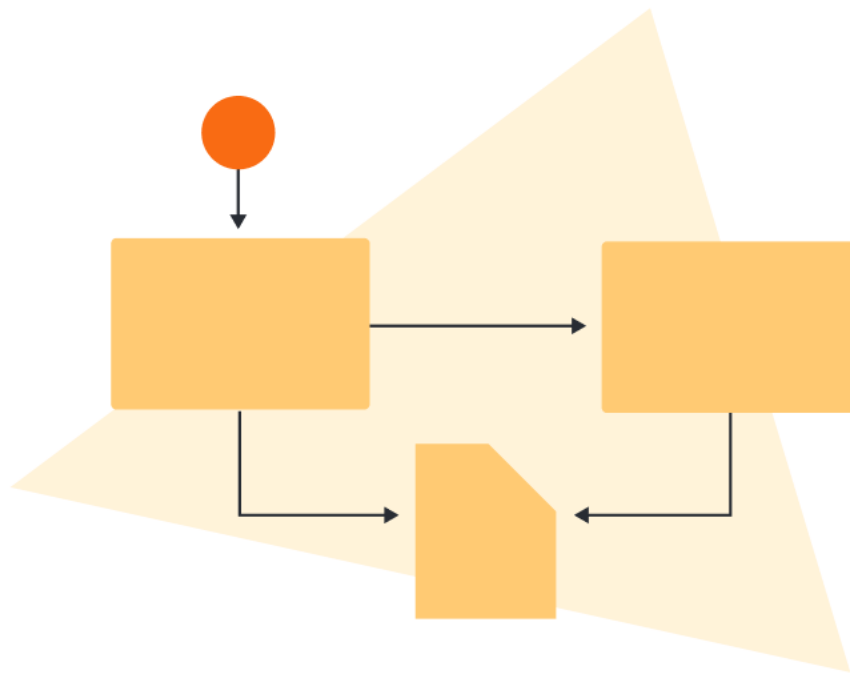
- Consensus ROI Dashboards
- Consensus Sales Demolytics

Data Flow Diagrams:

Lucidchart

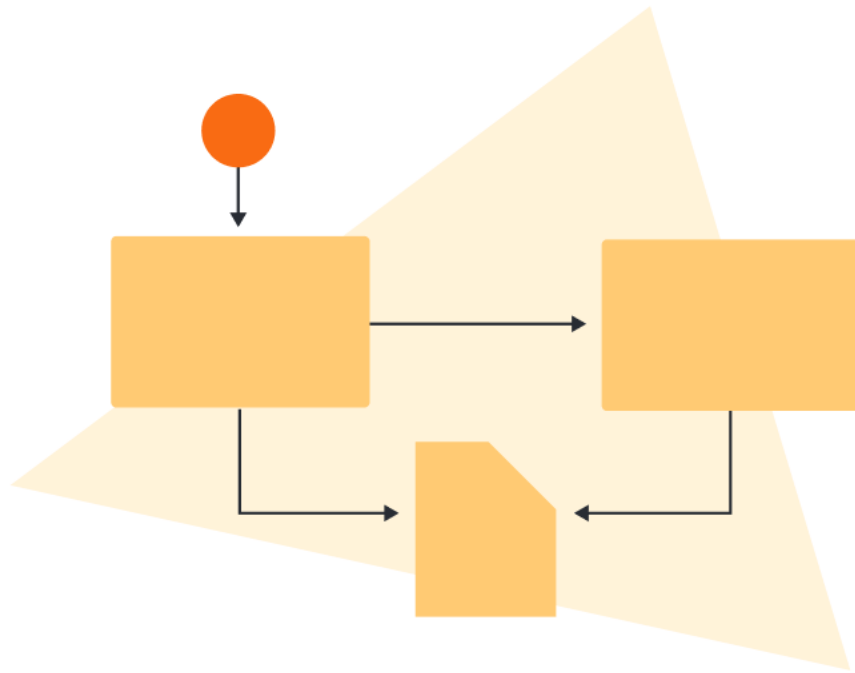


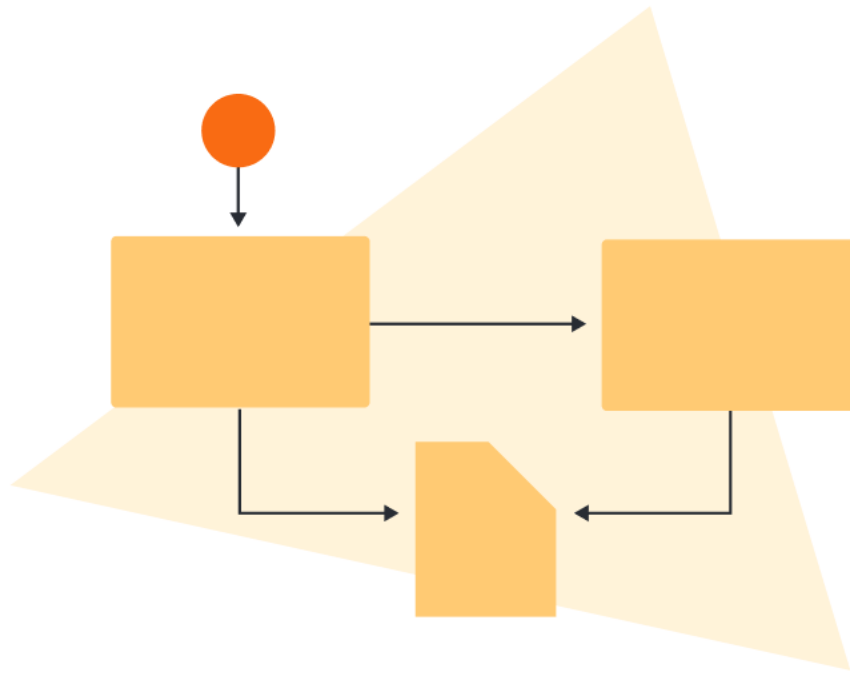
Delete Demos, which were deleted in Consensus.



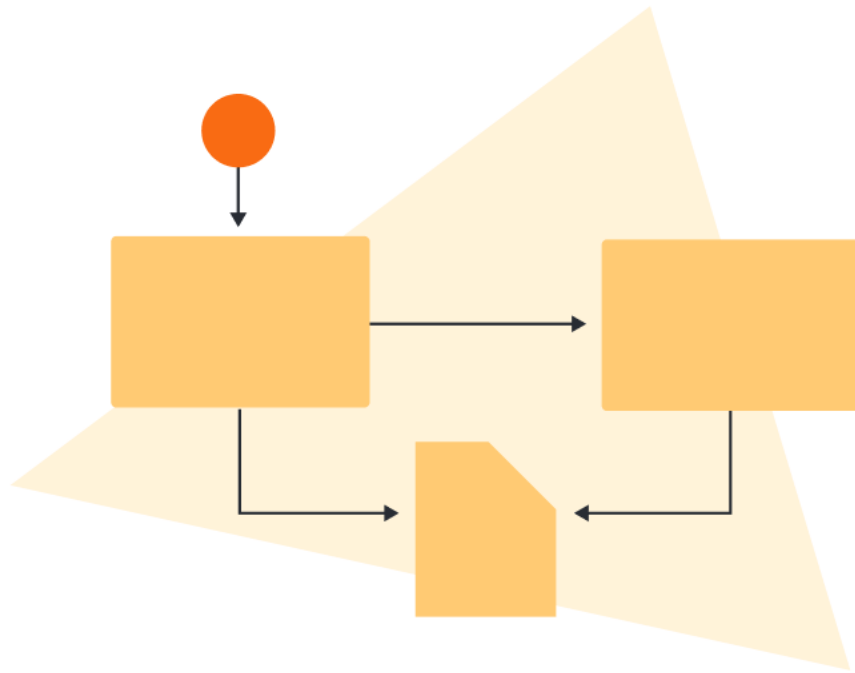
Contact Creation

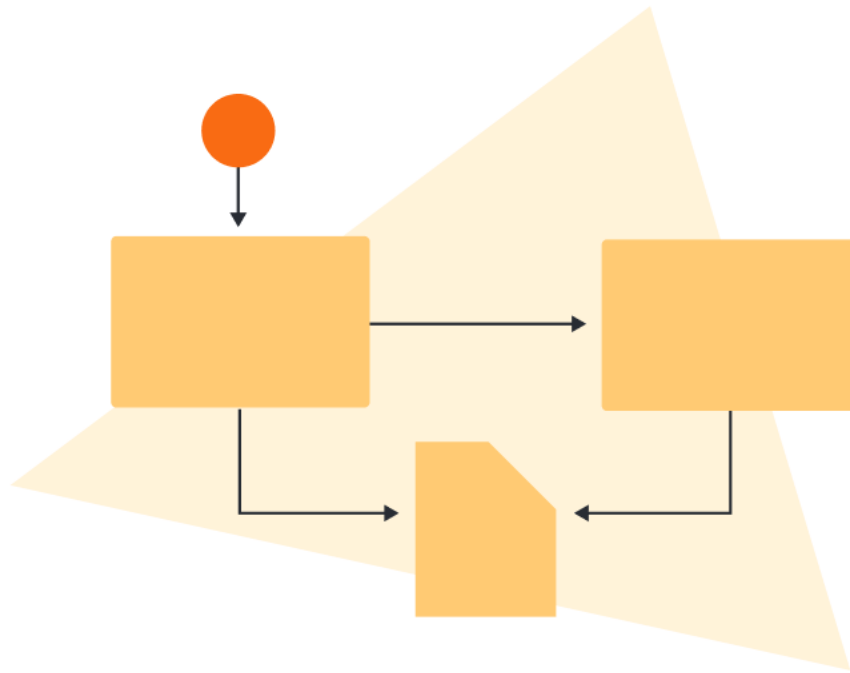
Lucidchart



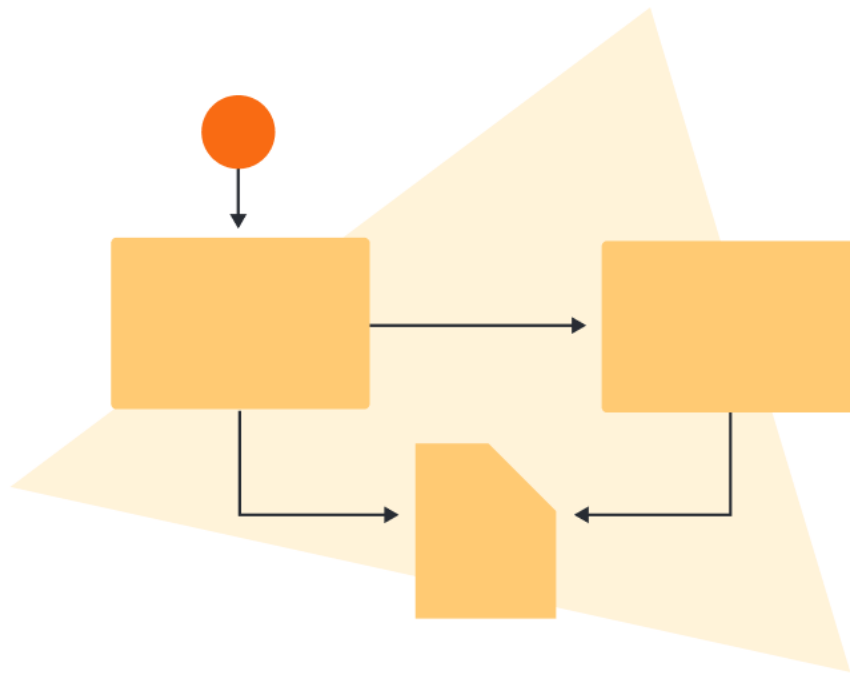


Create Lead





Contact Role Creation



Create Lead by Webhook

