

NPS Survey Builder User Guide

Introduction

Purpose of this Document

This guide provides step-by-step instructions for installing, configuring, and using the **NPS Survey Builder** application in Salesforce. It includes explanations for business users, troubleshooting tips, and visual aids for clarity.

What is the NPS Survey Builder?

The **NPS Survey Builder** helps businesses collect and analyze customer feedback through Net Promoter Score (NPS) surveys. The tool allows customization of surveys to fit business needs, improving customer experience insights.

Who Should Use This Guide?

- **Salesforce Administrators** – Responsible for installation and configuration.
 - **Business Users** – Understands survey creation and distribution.
 - **Developers** – Customizes or extends functionalities if needed.
-

Quick Start Guide

1. **Install** the NPS Survey Builder package
2. **Configure** Experience Site and permissions
3. **Create** your first survey
4. **Deploy** and collect responses
5. **Analyze** results with built-in dashboards

For detailed steps, continue reading below.

Creating and Managing Surveys

Step 9: Create a Survey Form

✓ Go to **App Launcher** > Search “**NPS Survey Builder**” > Click “**Create New**”. (Figure 48)

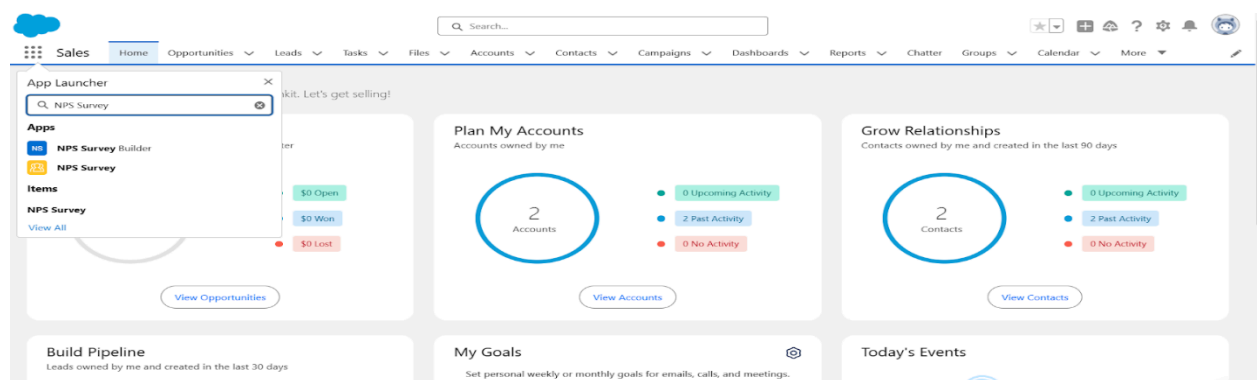


Figure 49: open NPS Survey Builder

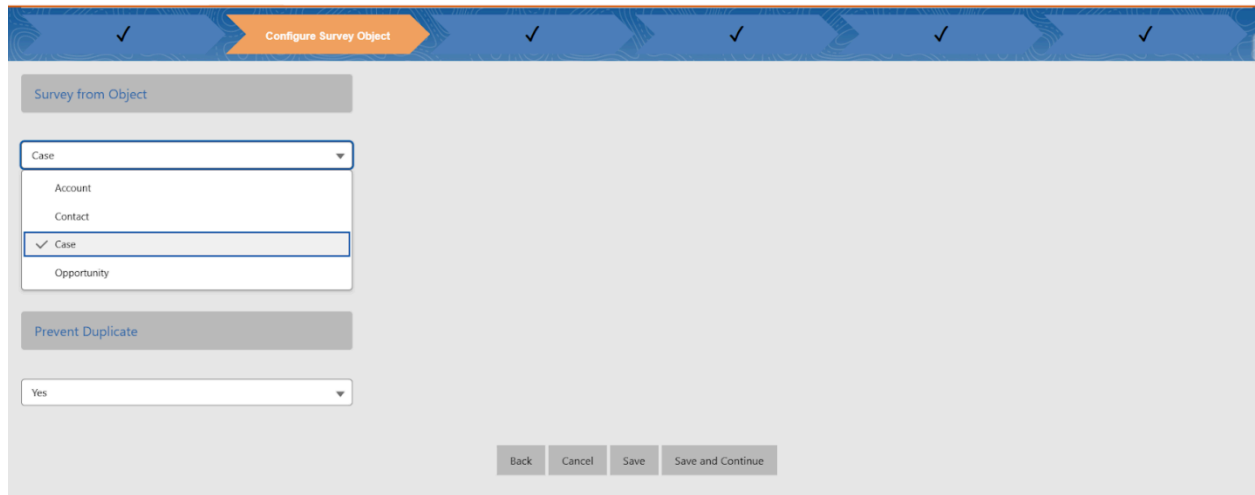
✓ Enter **Survey Name, Description, and Type**, then click “**Create**”. (Figure 49)

A screenshot of the "Create Survey Form" wizard. The top bar shows a progress indicator with five steps, the first of which is "Create Survey Form". The main form has two input fields: "Name your new survey" with the text "Test User Survey Form" and "Description" with the text "Test Survey Description". Below these fields is a section titled "Select the type of survey you want to send" with four options: "Net Promoter Score" (a 1-10 scale), "Customer Satisfaction Score (CSAT)" (three stars), "Customer Effort Score (CES)" (a scale from "Very Difficult" to "Very Easy"), and "Others" (with icons for heart, star, smiley face, and a question mark). At the bottom, there are two buttons: "Create New" and "Select Existing".

Figure 50: Create Survey Form

Step 10: Configure Survey Object

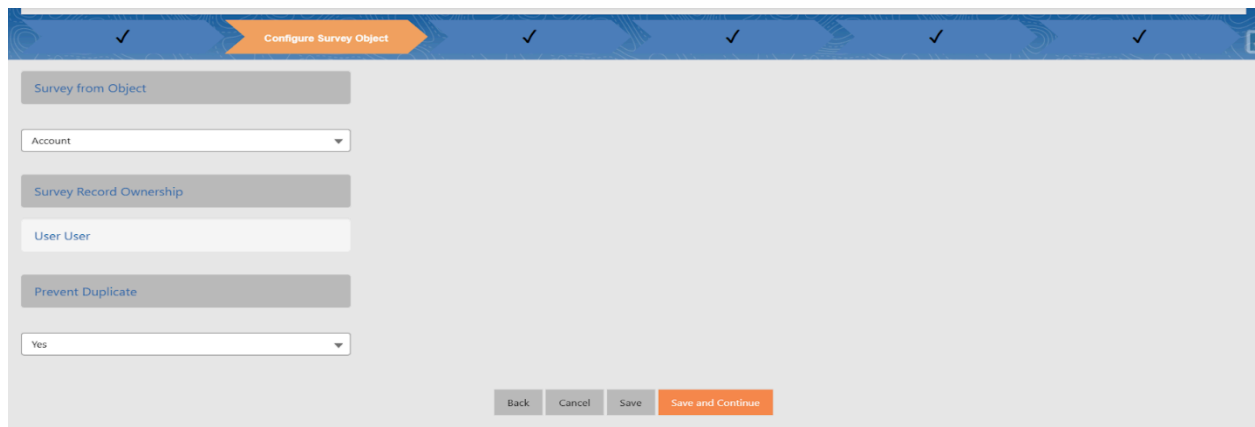
✓ Choose “**Survey Form Object**” and “**Prevent Duplicate**”. (Figure 50)



The screenshot shows the 'Configure Survey Object' step in a survey configuration interface. The top navigation bar has a blue background with a series of arrows and checkmarks. The current step, 'Configure Survey Object', is highlighted in orange. Below the navigation bar, the main content area is light gray. On the left side, there are two sections: 'Survey from Object' and 'Prevent Duplicate'. The 'Survey from Object' section has a dropdown menu with 'Case' selected. Below it, a list of options is shown: 'Account', 'Contact', 'Case' (with a checkmark), and 'Opportunity'. The 'Prevent Duplicate' section has a dropdown menu with 'Yes' selected. At the bottom right, there are four buttons: 'Back', 'Cancel', 'Save', and 'Save and Continue'.

Figure 51: Selecting Survey from the object and prevent Duplicate

✓ Click “**Save and Continue**” after adding questions. (Figure 51)



The screenshot shows the 'Configure Survey Object' step in a survey configuration interface. The top navigation bar has a blue background with a series of arrows and checkmarks. The current step, 'Configure Survey Object', is highlighted in orange. Below the navigation bar, the main content area is light gray. On the left side, there are four sections: 'Survey from Object', 'Survey Record Ownership', 'Prevent Duplicate', and 'User User'. The 'Survey from Object' section has a dropdown menu with 'Account' selected. The 'Survey Record Ownership' section has a dropdown menu with 'User User' selected. The 'Prevent Duplicate' section has a dropdown menu with 'Yes' selected. At the bottom right, there are four buttons: 'Back', 'Cancel', 'Save', and 'Save and Continue'. The 'Save and Continue' button is highlighted in orange.

Figure 52: Click the Save and Continue button

Step 11: Add Questions & Branding

✓ Check Question is created or not.

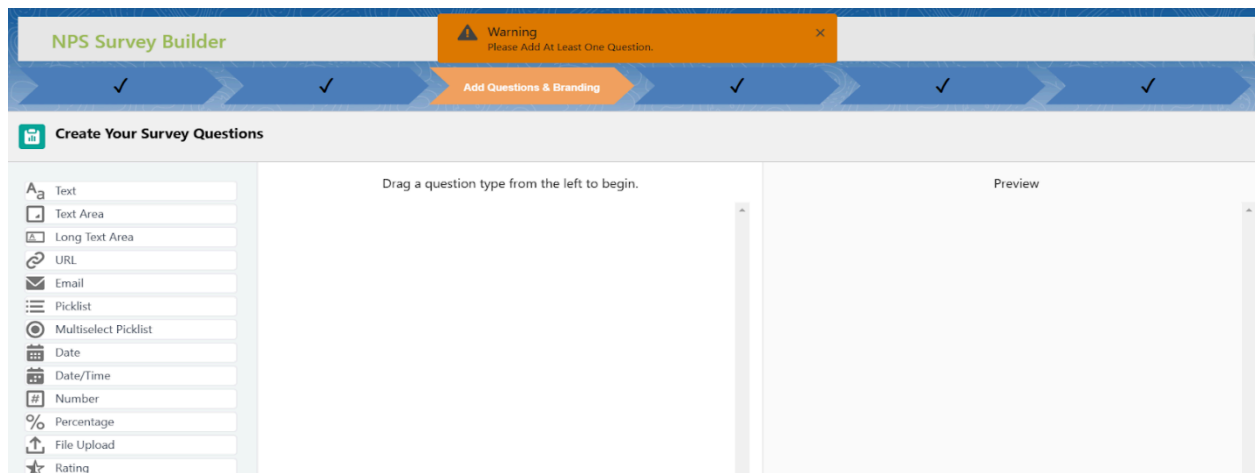


Figure 53: "Please Add At Least One Question"

✓ Drag & drop different question types into the survey form. (Figure 53)

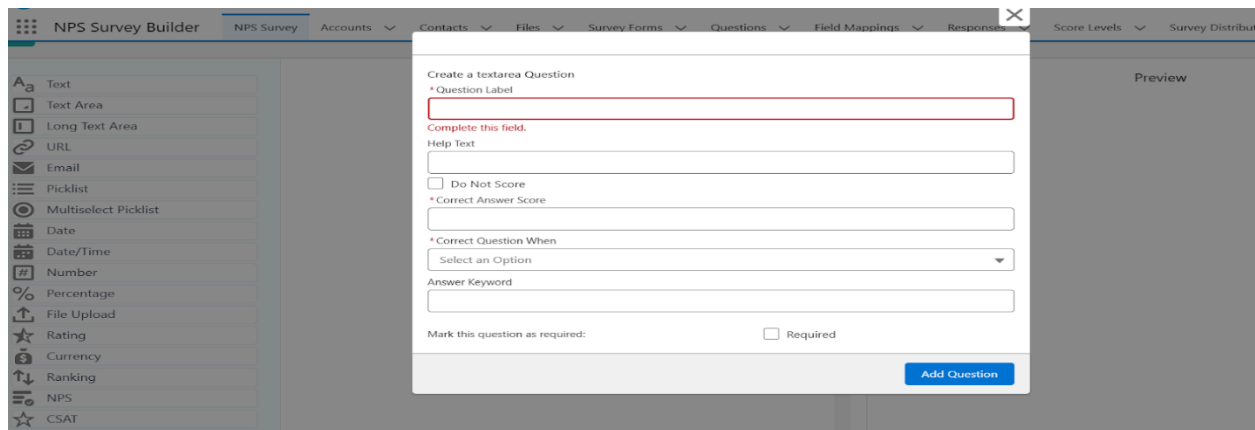
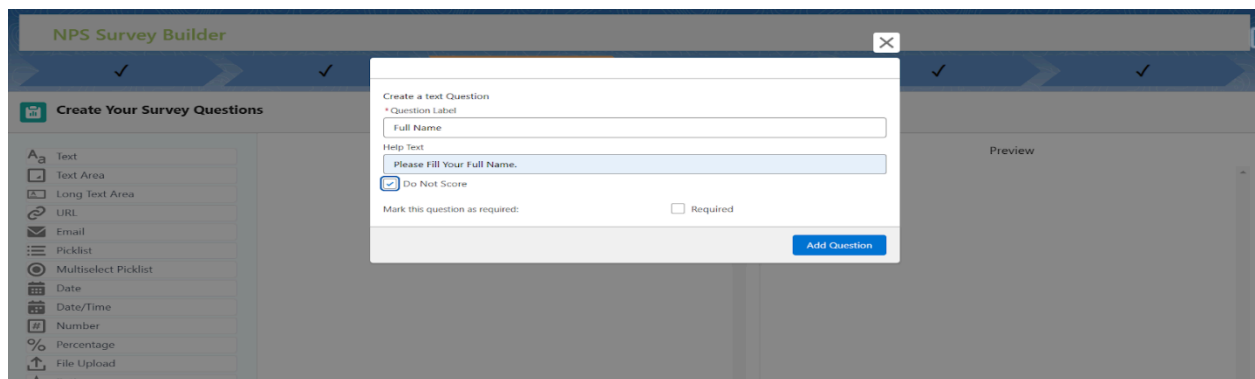


Figure 54: Select the data type to create a question

a. Click on **“Do Not Score”**. For not scoring that question. (Figure 55)

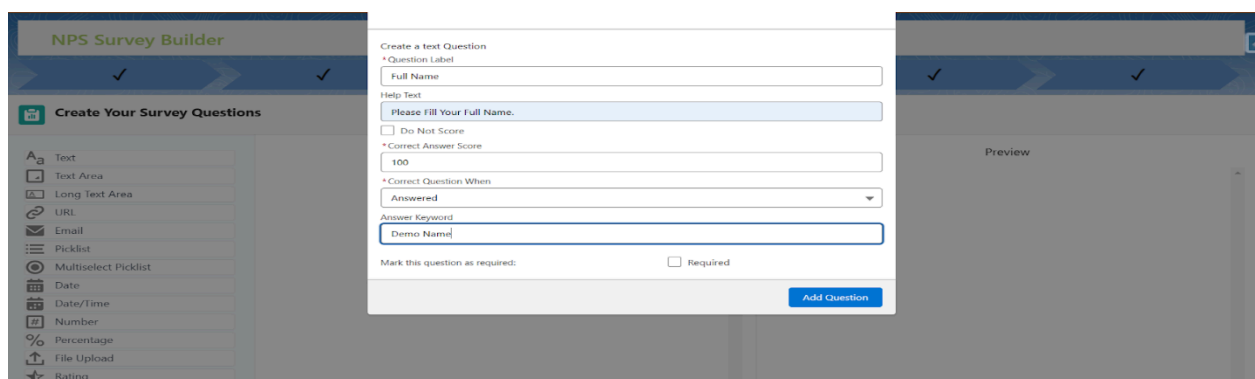


The screenshot shows the 'NPS Survey Builder' interface. On the left, there is a sidebar titled 'Create Your Survey Questions' with various question types listed: Text, Text Area, Long Text Area, URL, Email, Picklist, Multiselect Picklist, Date, Date/Time, Number, Percentage, File Upload, and Rating. The main area displays a 'Create a text Question' dialog box. The dialog box contains the following fields and options:

- Question Label:** Full Name
- Help Text:** Please Fill Your Full Name.
- Do Not Score:** ☒ (checked)
- Mark this question as required:** ☐ Required
- Add Question:** (button)

Figure 55: Select the data type to create a question

b. **“Correct Answer Score”, “Correct Question When” and “Answer Keyword”**. (Figure 56)



The screenshot shows the 'NPS Survey Builder' interface. On the left, there is a sidebar titled 'Create Your Survey Questions' with various question types listed: Text, Text Area, Long Text Area, URL, Email, Picklist, Multiselect Picklist, Date, Date/Time, Number, Percentage, File Upload, and Rating. The main area displays a 'Create a text Question' dialog box. The dialog box contains the following fields and options:

- Question Label:** Full Name
- Help Text:** Please Fill Your Full Name.
- Do Not Score:** ☐ (unchecked)
- Correct Answer Score:** 100
- Correct Question When:** Answered (dropdown menu)
- Answer Keyword:** Demo Name
- Mark this question as required:** ☐ Required
- Add Question:** (button)

Figure 56: To Save the question, click on the Add Question button

✓ Click **“Save”** after adding questions. (Figure 57)

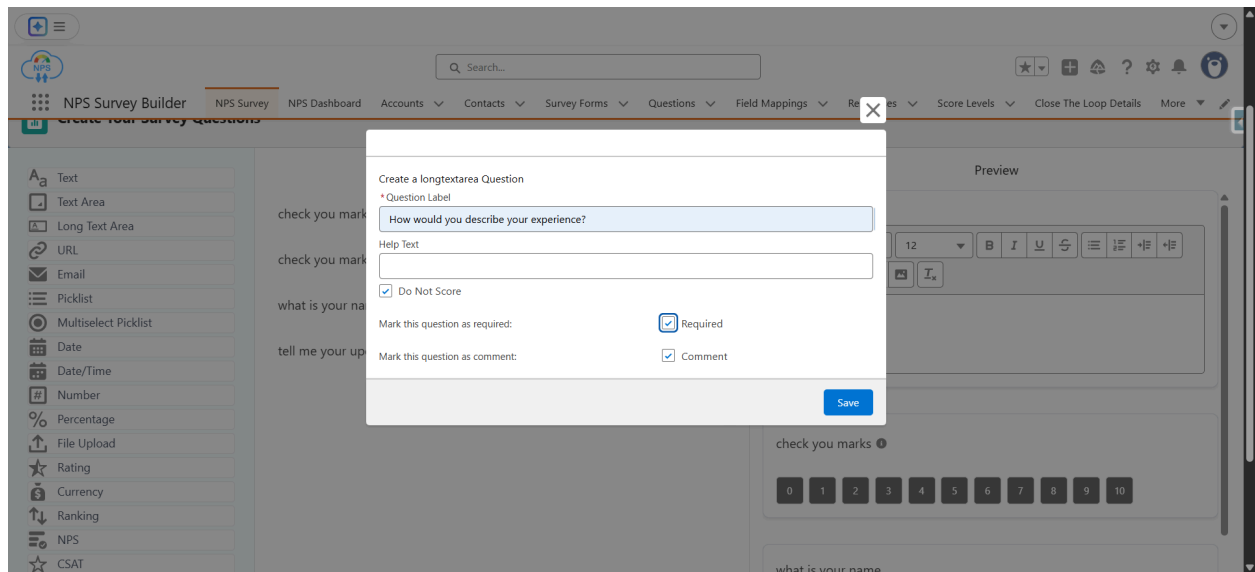
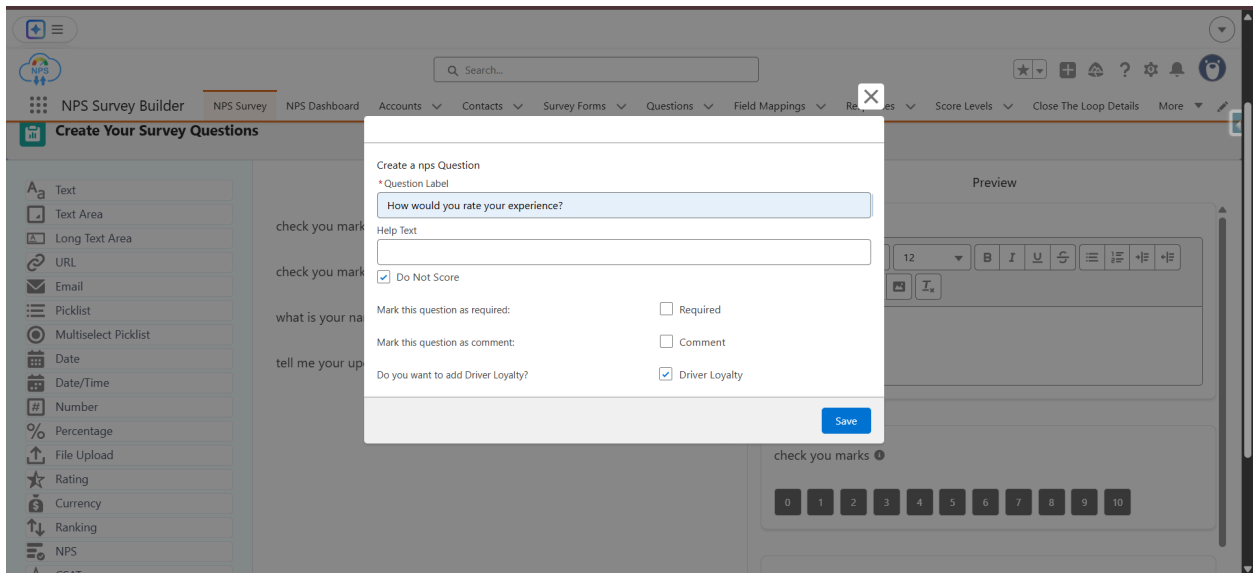


Figure 57: Click on the edit icon button to update questions

Note:- If you want to make this question **‘Required’** and **‘Comment’** check the checkbox. (Figure 57)

C:- If you want to display the **“Driver Loyalty Question”** on **NPS**.

Select the **“Do you want to add Driver Loyalty?”** checkbox.



Step 12: Customize the Survey Form

✓ Configure **Survey Settings** (required questions, auto-close date).

a. click on the “**Apply**” button to save. (Figure 58)

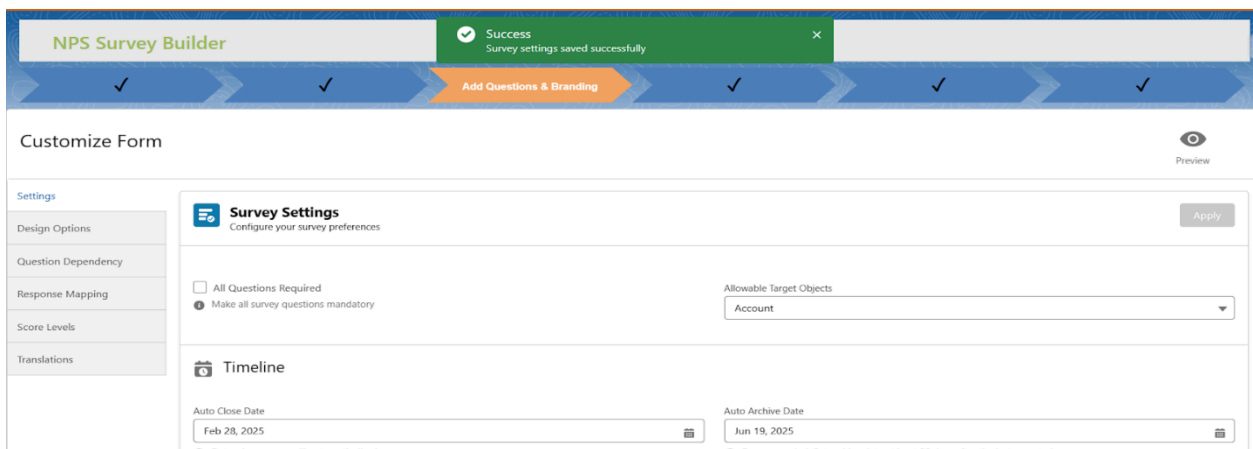


Figure 58: click on the Apply button to get the success message

✓ Design Survey Form using **Design Option**

a. Click on the “**Apply**” button. (Figure 59)

Figure 59: Click on the Apply button to save the Design

✓ Add Question Dependency

a. Click on “Save Rule” to save Rule. (Figure 60)

Figure 60: To Apply New Rule on Questions

✓ Set up Response Mapping to link responses with Salesforce objects. (Figure 61)

Figure 61: Click on the Save Mappings button to save

✓ Define **Scoring Levels** to classify responses. (Figure 62)

SCORE RANGE	SCORE LABEL	SCORE COLOR	ACTION
20 <= Survey Score < 40	High	Red #DD1515	Trash
40 <= Survey Score < 70	Medium	Yellow #DADA18	Trash
70 <= Survey Score <= 100	Low	Green #07833B	Trash +

Figure 62: Click on the Save button to save the score level

Step 13: Thank You Page

✓ Add a **custom message** thanking users for their responses.

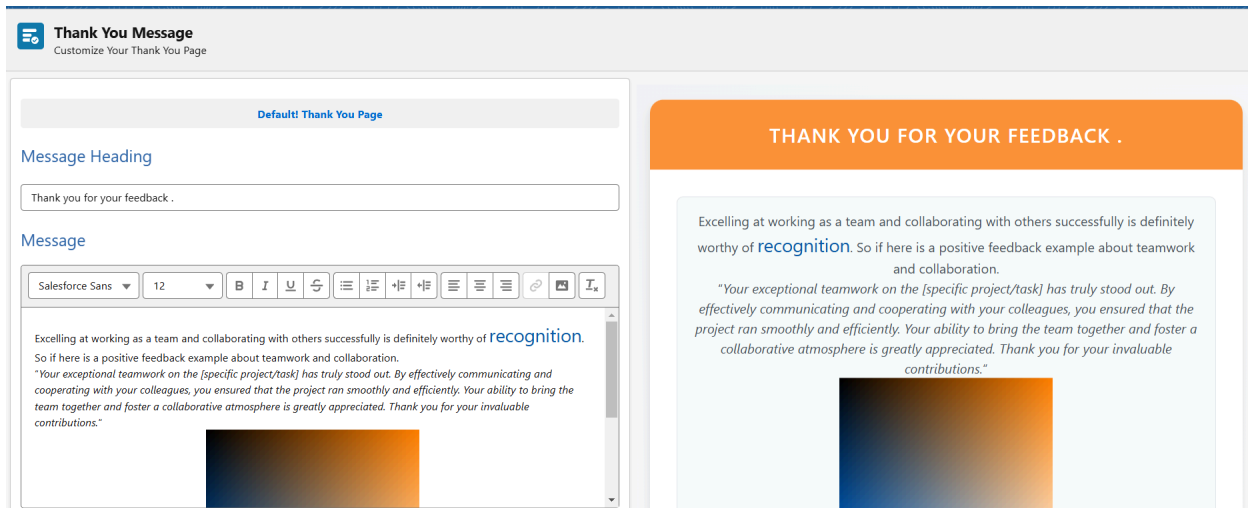


Figure 77: To Add Message Heading and Message

✓ Click **"Save and Continue"** to apply changes.

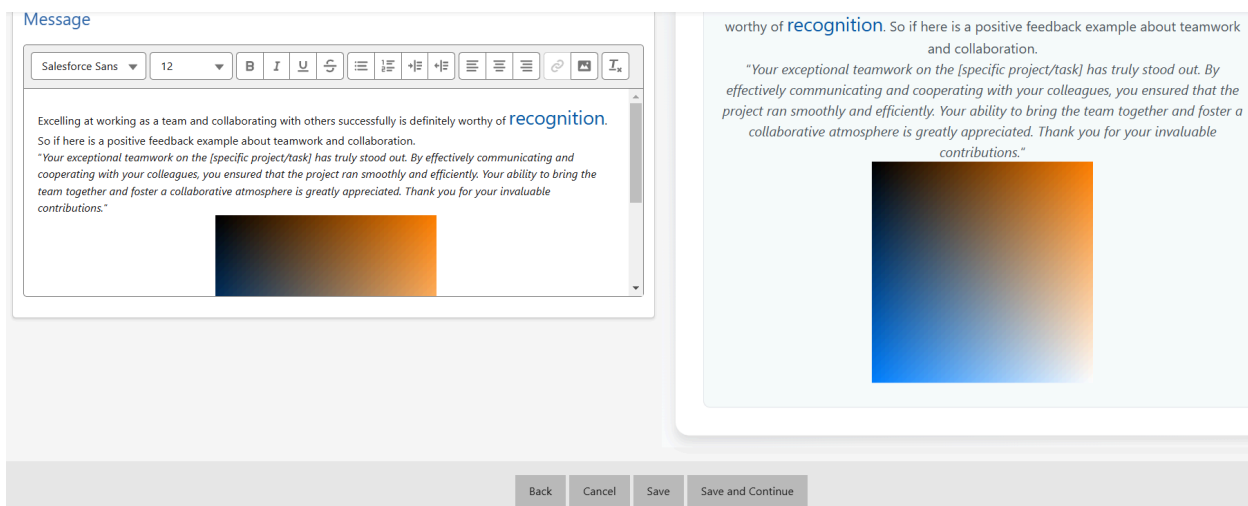


Figure 78: Click on the Save and Continue button

Step 14: Delivery and Deployment

✓ Choose **Email or QR Code** as the distribution channel. (Figure 79)

The screenshot shows the 'Survey Distribution & Deployment' interface. At the top, there's a header with a menu icon and the text 'Survey Distribution & Deployment' and 'Manage and track your survey distribution'. Below this is a 'Share Survey' section with a link icon and a text input field containing the URL 'https://cx360test.my.site.com/s/?surveyFormId=a05fj000002ht3PQAAQ'. To the right of the URL is a copy icon. Below the 'Share Survey' section is the 'Distribution Channels' section, which contains two buttons: 'Email' (with an envelope icon) and 'QR Code' (with a QR code icon). The 'Email' button is highlighted with a blue border.

Figure 79: Select the Distribution channel

✓ Select recipients and an **email template**.

The screenshot shows the 'Survey Distribution & Deployment' interface. The top section is a table with columns for checkboxes, names, email addresses, and a fourth column. The table contains the following data:

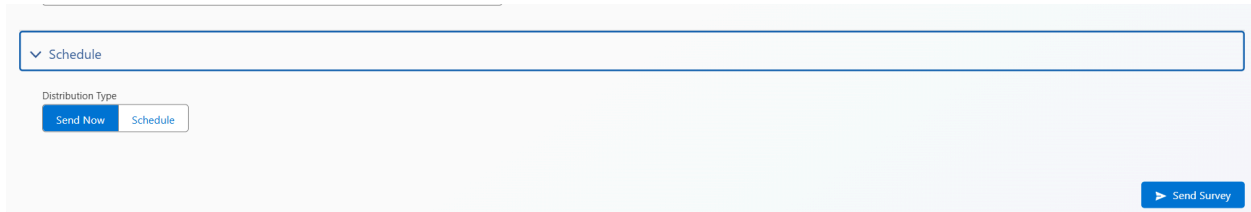
	Name	Email	
<input checked="" type="checkbox"/>	Ankit Sinha	ankit.appycrown@gmail.com	Ankit
<input type="checkbox"/>	Carole White	info@salesforce.com	Global Media
<input checked="" type="checkbox"/>	Deepak Singh	deepak.appycrown@gmail.com	Test Account
<input type="checkbox"/>	Edward Stamos	info@salesforce.com	Acme
<input type="checkbox"/>	Geoff Minor	info@salesforce.com	Global Media
<input checked="" type="checkbox"/>	Howard Jones	info@salesforce.com	Acme
<input type="checkbox"/>	Jon Amos	info@salesforce.com	Global Media
<input type="checkbox"/>	Lalji Prajapati	lalji.appycrown@gmail.com	Lalji Prajapati
<input type="checkbox"/>	Leanne Tomlin	info@salesforce.com	Acme

Below the table are navigation buttons: 'Previous', '1', '2', and 'Next'. The '2' button is highlighted. Below the navigation buttons is the 'Customization' section, which contains an 'Email Template' dropdown menu. The dropdown menu is open, showing 'Select an Option' and 'NPS Survey'. Below the dropdown menu is a 'Survey Archive Completion' section.

Figure 79: Select the Distribution channel

✓ Click **“Send Survey”** to distribute.

▪ Click on **“Send Now”** or **“Schedule”** for send survey. (Figure 80)



The screenshot shows a survey distribution interface. At the top, there is a dropdown menu labeled 'Schedule'. Below it, there is a section titled 'Distribution Type' with two buttons: 'Send Now' and 'Schedule'. At the bottom right, there is a blue button labeled 'Send Survey'.

Figure 80: Select the Schedule

Step 15: Reviewing Results

✓ Navigate to the **Results Tab** in Salesforce.

a. View **Response Reports** and analyze customer feedback. (Figure 81)

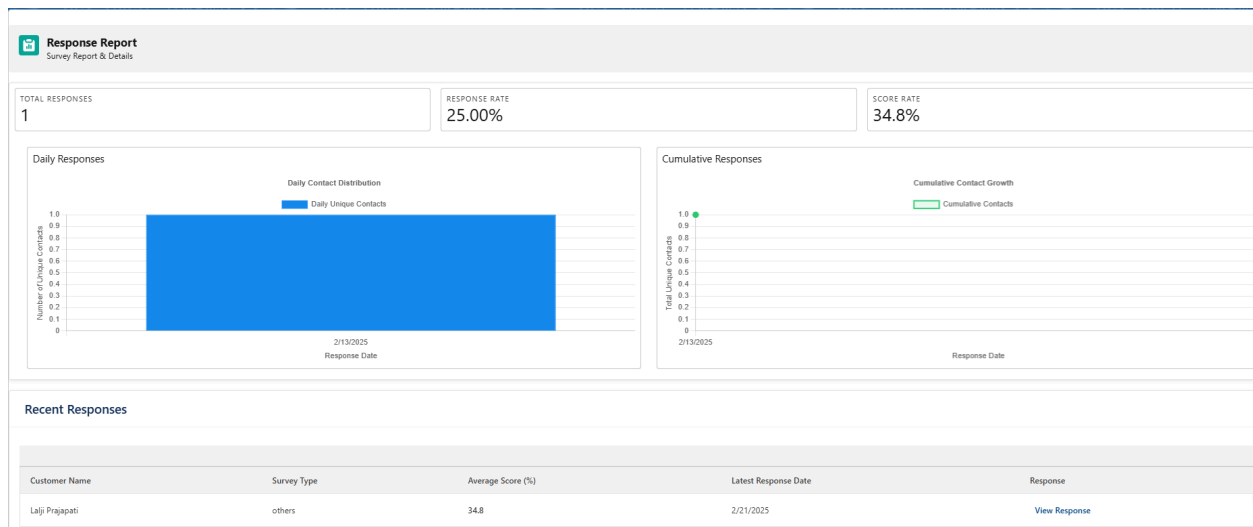


Figure 81: Review Response

✓ Click on individual responses to see question-wise breakdowns.



Test Number	OtherCity	50	100.00%	High		
Test Percentage	OtherLongitude	50	100.00%	High		
Test File Upload	OtherLongitude	N/A	N/A	N/A	N/A	
Test Rating Heart	MailingStreet	8	0.00%	N/A	N/A	
Test Rating Star	OtherAddress	10	0.00%	N/A	N/A	
Test Rating Number	MailingCity	8	100.00%	High		

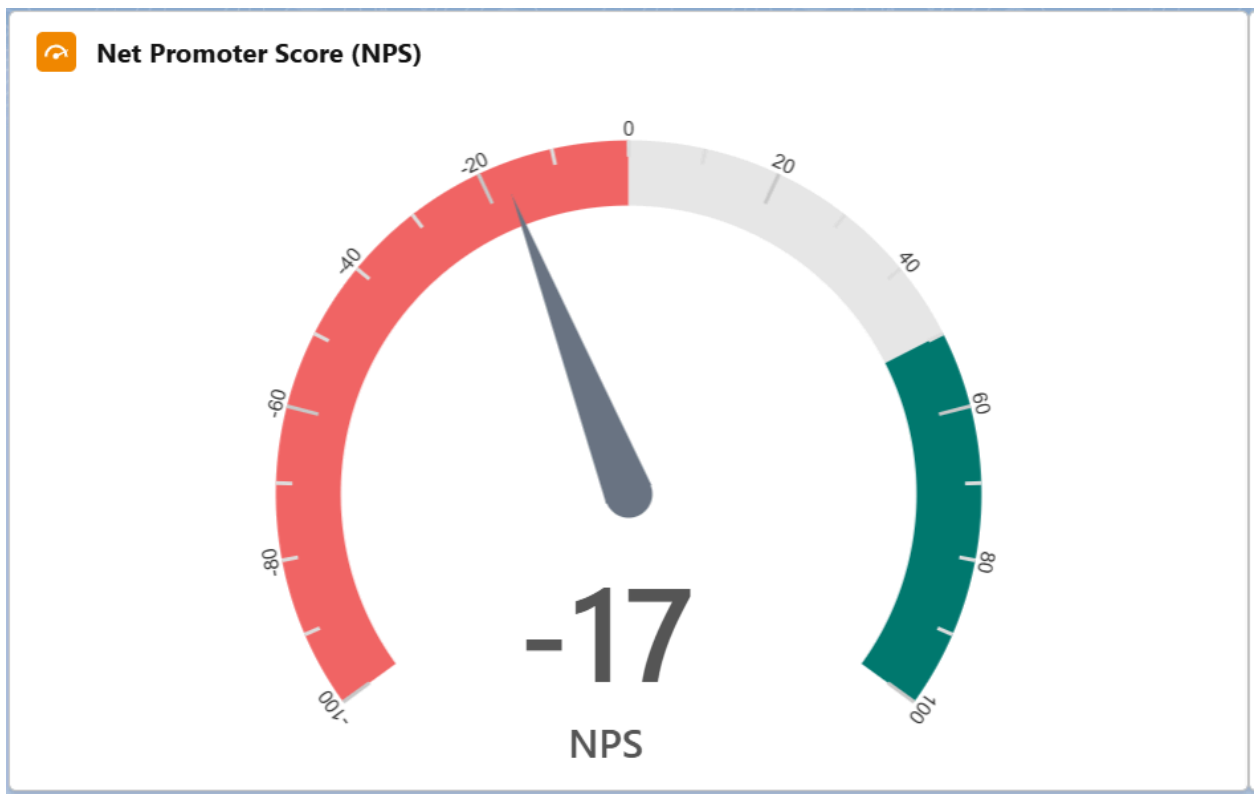
Figure 82: View Response for Individual

NPS Dashboard

Net Promoter Score

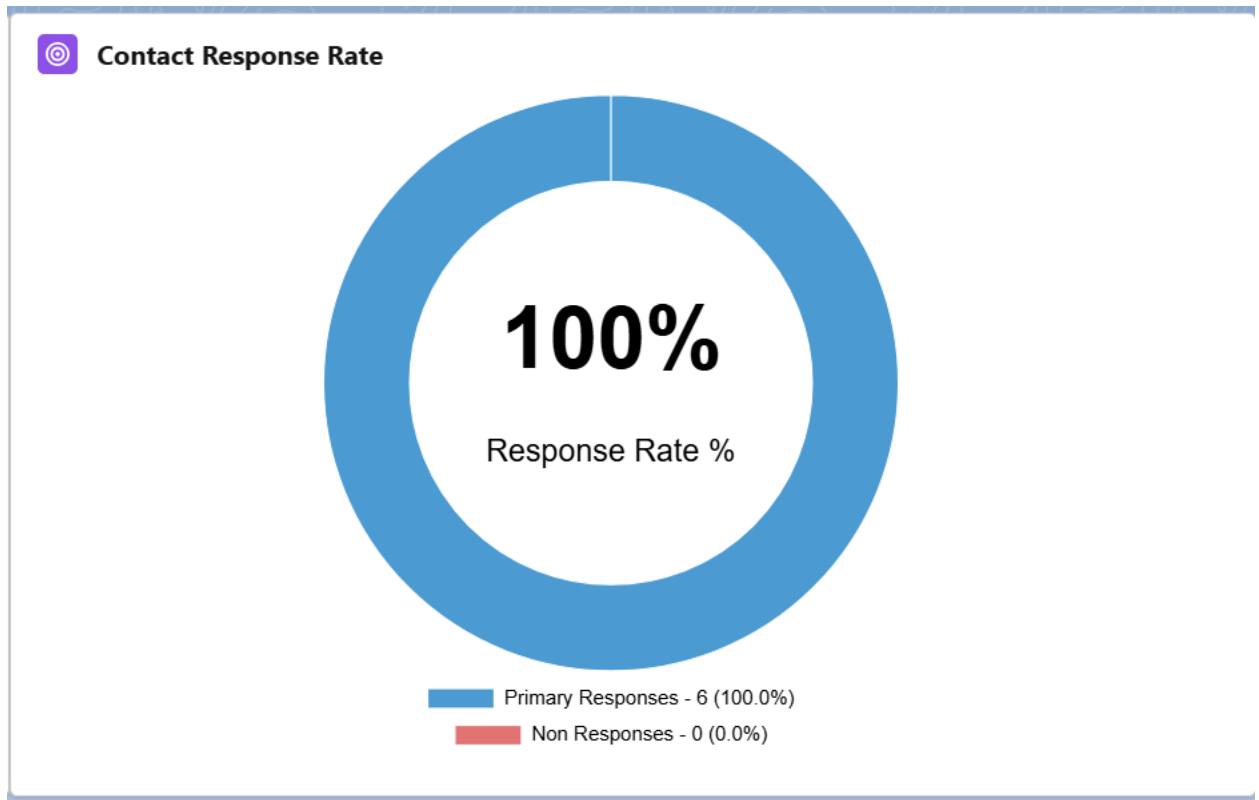
Below image is for the NPS Promoter Score (NPS) Dashboard, where it

Show the score of the NPS.



Contact Response Rate

Below image is for the **Contact Response Rate** which shows the response rate related to the contacts.

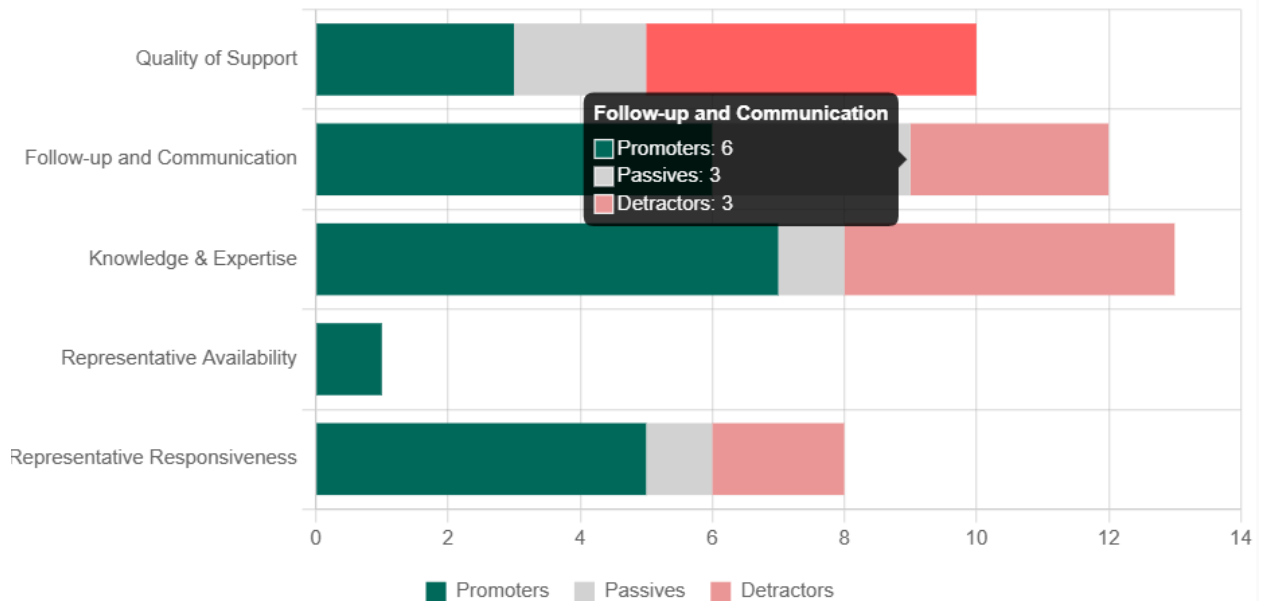


Contact Response Rate

Below image is for the **Driver Loyalty**, which shows the score of the Driver Loyalty of each question.



Drivers Loyalty

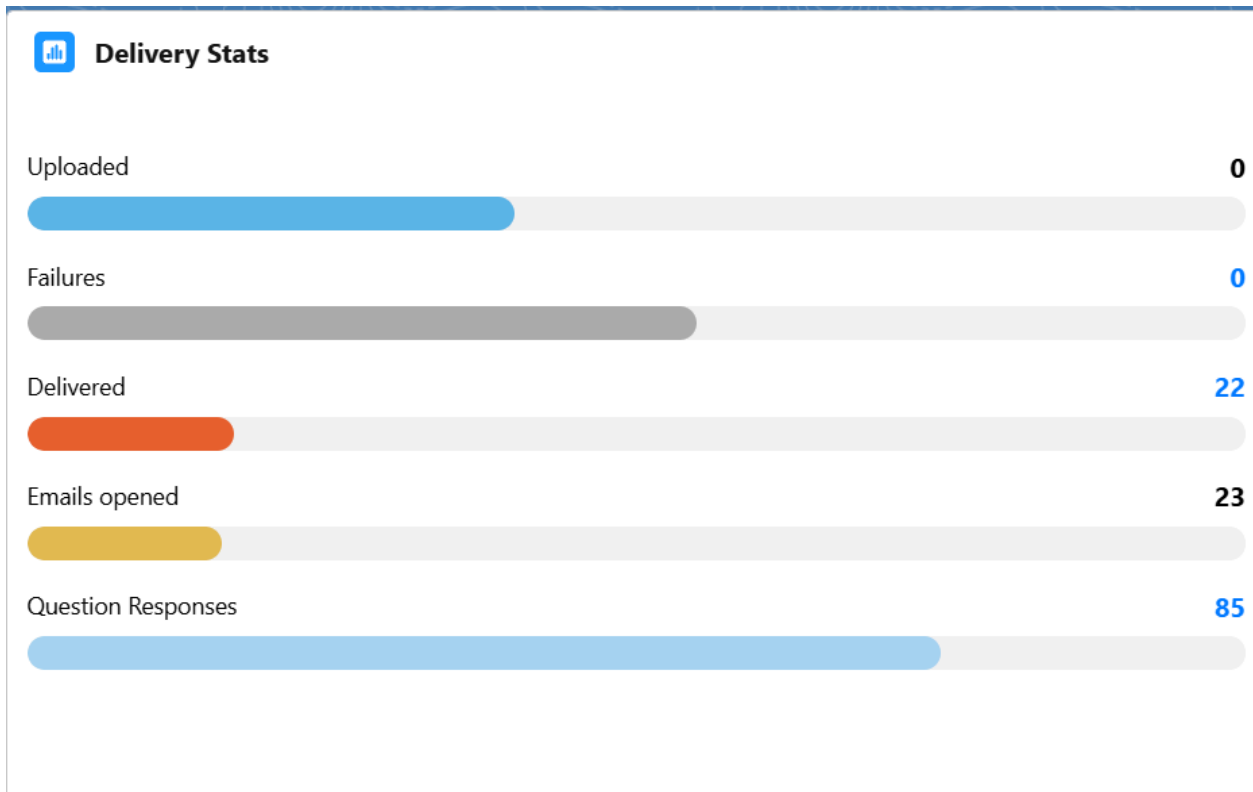


Delivery Stats

Below image for the **Delivery Stats** where it shows about the Delivery stats.

Example:- **Uploaded Files, Failure Survey Form, Delivered Survey Form, Email, Question Response.**

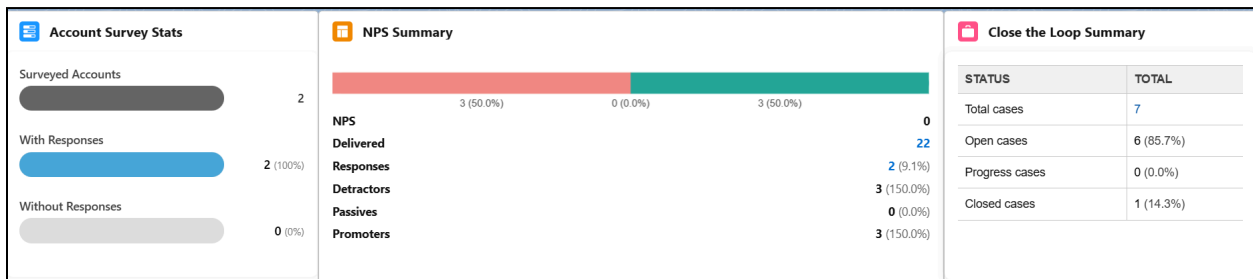
Note:- The [blue](#) color data is hyperlink which opens the Standard reports related to that Stats.



Account Dashboard:- Stats, NPS, Close The Loop

Below image for the Dashboard which is related to the **Account**. where it will show the following data

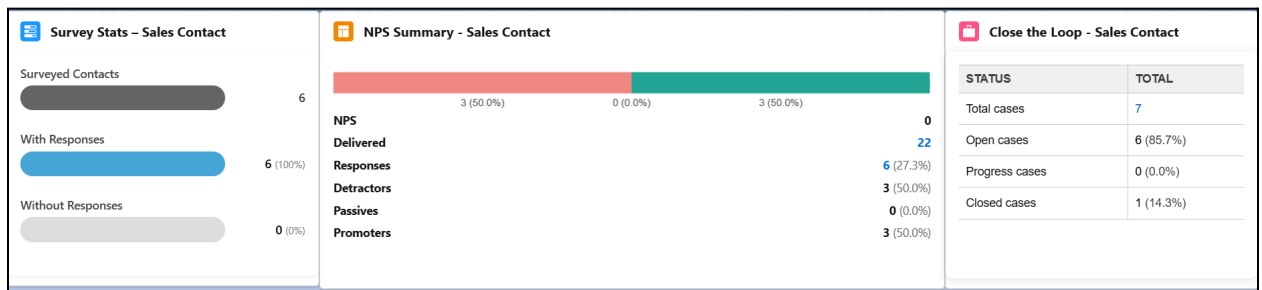
- A. **Survey Accounts** means Survey Form sent and how many survey receives related to the Account.
- B. NPS Summary where display data of **NPS Score, Delivered, Responses, Promoter Score, Passive Score and Decorators Score**.
- C. **Close the loop** created when NPS Score is between **0 to 6**.



Contact Dashboard:- Stats, NPS, Close The Loop

Below image for the Dashboard which is related to the **Contact**. where it will show the following data

- A. **Survey Contacts** means Survey Form sent and how many survey receives related to the Account.
- B. NPS Summary where display data of **NPS Score, Delivered, Responses, Promoter Score, Passive Score and Decorators Score**.
- C. **Close the loop** created when NPS Score is between **0 to 6**.



Note:-

1. Click on the **Total Cases** of the Close The Loop. It will open the below page, where you can see all details of **Close The Loop** in a datatable.
2. After clicking on the **Case ID**, it will open another page where you can see the details of the **Contact**.
For Example:- **NPS Score, Status, Months Since completed, Time To Follow Up** etc.
3. When moving to the **Survey Overview**, you get the details about the **Survey Form, Account, contact**.
4. In the last button, **Close the Loop**, you get the **NPS Score, Time To Follow up** and a **comment box** where Case Owner close the loop case after getting feedback from the customer.

Close The Loop Details






Close the Loop Details

Total cases: 7

Page size

Sele...

Q Search...

	Case ID	First Name	Last Name	Email	Response...	Survey Fo...	Status	Priority	Account ...	Survey C...	Hours to ...	Hours to ...	Assignee
1	CL-0001	Ankit	Kumar	 sinhaankit...	4	Test Survey1	Closed	High	Ankit	08/19/2025, 1...	310	163	User User
2	CL-0002	Amit	Kumar	 pratap.sun...	5	Test Survey1	Open	High	Ankit	08/19/2025, 1...	310	71	Pratap Sunder
3	CL-0003	Gautam	kumar	 gautam.gn...	6	Test Survey1	Open	High	Ankit	08/20/2025, 1...	291	52	Pratap Sunder
4	CL-0008		Testing	 kumaranki...	4		Open	High	AppyCrown	08/25/2025, 1...	168	0	Case Assigned
5	CL-0007		Utkarsh	 sinhaankit...	4	Final Destination	Open	High	AppyCrown	08/25/2025, 1...	168	0	Case Assigned

Showing 1 to 5 of 7 records

First

Previous

Next

Last

Page 1 of 2


Utkarsh

 from AppyCrown

Response Details


Survey Overview

Close The Loop




4

NPS




0

Months Since Completed



168

Time To Follow Up (hours)



Open

Status

Comment

4


NPS

fgr

8 days ago

Contact Information

Email:

 sinhaankit536@gmail.com

Priority:

High

Response Date:

Aug 25, 2025


Utkarsh

 from AppyCrown

Response Details


Survey Overview

Close The Loop




Final Destination

Survey Form



AppyCrown

Account Name



Utkarsh

Contact Name

Survey Overview

Survey Type:

nps

Survey Status:

Open

Completion Date:

Aug 25, 2025

Troubleshooting Guide

Issue	Solution
Survey form not loading	Check if the Experience Site is activated.
Users not receiving emails	Verify that Deliverability settings allow emails.
Guest users cannot submit responses	Ensure public access is enabled in sharing settings.Ensure permission is given to the Guest User.
Installation failed	Check if the Salesforce Org has the correct permissions and re-install.

Final Checklist for Administrators

- ✓ **NPS Survey Builder Installed**
- ✓ **Experience Site Registered & Activated**
- ✓ **Guest User & Admin Permissions Assigned**
- ✓ **Survey Created & Deployed**
- ✓ **Results Analyzed**