CONFIGURATION RESOURCE PACK

NPS Survey CX OS

Installation, advanced configuration, administration, automation, reporting, and go-live reference

This resource pack is the configuration reference for Salesforce administrators, implementation teams, survey owners, and support teams responsible for setting up and maintaining NPS Survey CX OS. It complements the Getting Started Guide by focusing on detailed configuration, validation, and troubleshooting.

Document Detail	Value
Edition	August 2026
Release date	August 19, 2026
Document owner	SalesHub
Audience	Salesforce Administrators • Implementation Teams • Survey Owners • Support Teams
Status	Current configuration reference
Companion resources	Getting Started Guide • Frequently Asked Questions • Release Notes

Scope note

This edition documents current, available configuration. Opaque/upcoming navigation items are not configured here. CSAT Director and Manager dashboard configuration is intentionally excluded until the redesigned CSAT experience is released.

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Table of Contents

Select a section below to jump directly to the configuration topic. The document is organized from environment setup through feature configuration, validation, and support.

1. Purpose & How to Use This Pack

The Configuration Resource Pack is the detailed reference for configuring and maintaining NPS Survey CX OS in Salesforce. It is designed to support implementation, administration, troubleshooting, and controlled production changes without duplicating the step-by-step onboarding experience in the Getting Started Guide.

Use this pack when you need to…	Primary section
Install or validate the managed package and Experience Site	Installation & Environment Readiness
Grant access or troubleshoot user visibility	Access, Permission Sets & App Access Manager
Configure survey behavior, logic, mapping, branding, or advanced questions	Survey Builder Configuration Reference
Set up Static CSAT or VOC sending conditions	Static CSAT / VOC Configuration
Configure scheduled or event-driven sending and reminders	Automation Command Center
Understand trigger availability or enable/disable status	Trigger Control Panel
Find question-level responses or review analytics	Reporting / Analytics
Prepare a release for production	Testing, UAT & Go-Live

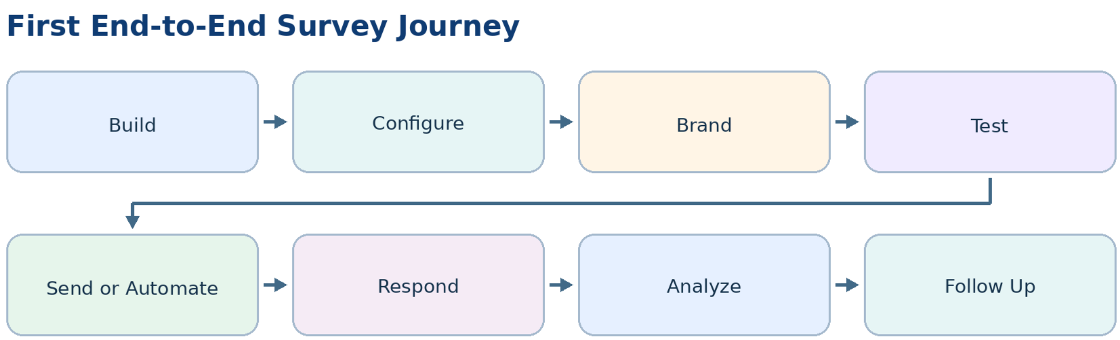
Current-UI rule

For application screens, use the latest demo-org experience and current recordings as the UI source of truth. Older guides remain useful for configuration rules, but screenshots should be replaced when the live interface changes.

Back to Table of Contents

2. Configuration Lifecycle & Responsibilities

A successful configuration follows a controlled sequence: establish the Salesforce environment, secure access, configure the survey experience, configure sending behavior, validate response capture, and confirm reporting before production use.



Configuration lifecycle from setup through analysis and follow-up.

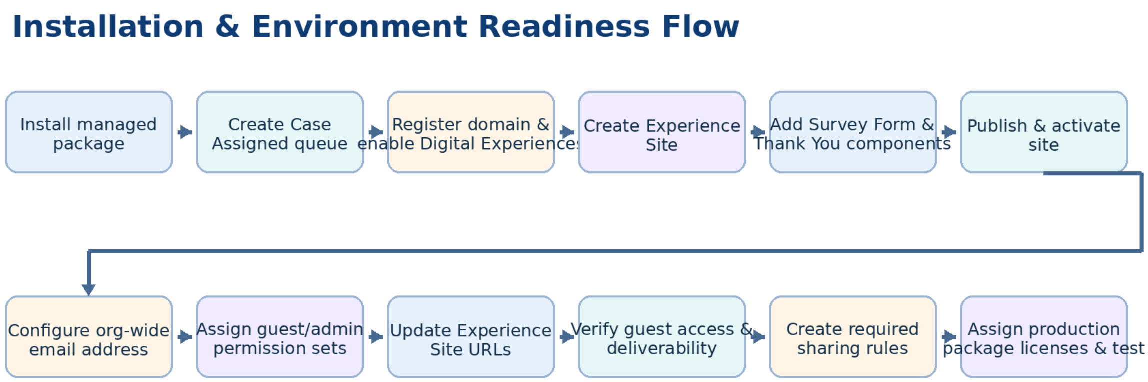
Role	Primary responsibility
Salesforce Administrator	Package installation, Experience Site, permissions, sharing, email/deliverability, licenses, production readiness.
Survey Owner / Business Administrator	Survey structure, question design, dependencies, branding, email selection, deployment decisions.
Implementation / QA	Validation of configuration, UAT scenarios, response capture, automation behavior, regression checks.
Report / Analytics User	Question-level reports, NPS dashboard, Survey Response Analytics, data-quality review.
Support Team	First-line troubleshooting using configuration checks, FAQ, and environment validation.

> **Change-management principle**
> Test configuration changes in a sandbox or controlled test environment before production. For existing surveys or automations, review the impact on historical responses, active sends, reminders, and reporting before saving changes.

[Back to Table of Contents]

3. Installation & Environment Readiness

The installation process establishes the managed package, public survey experience, email sending configuration, permissions, sharing, and production licenses. The sequence below consolidates the current standalone Installation & Configuration Guide into a configuration checklist.



Recommended installation and environment-readiness sequence.

3.1 Installation Sequence

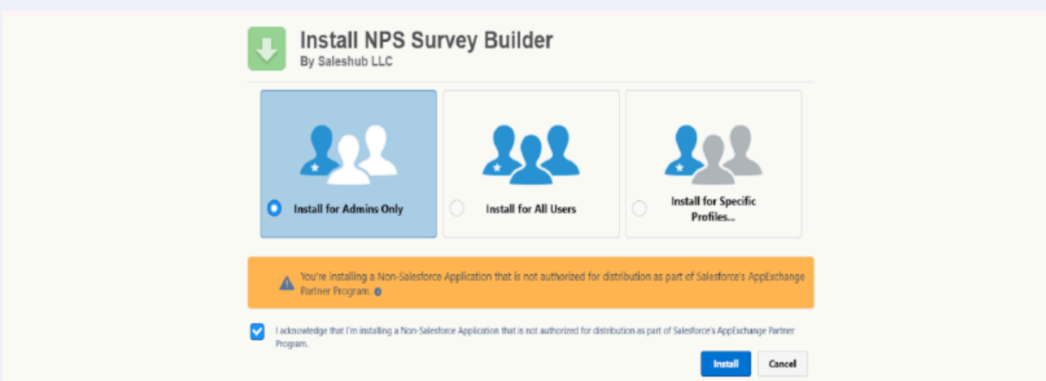
Step	Configuration	What to verify
1	Install the NPS Survey Builder managed package	Log in to the target Salesforce org, select the appropriate installation scope/profile, and install the package.
2	Create the Case Assigned queue	Create the queue and include Close The Loop and Response objects; add the required users.
3	Register the Salesforce domain	Use Setup > Sites and register the Salesforce domain if required.
4	Enable Digital Experiences and create the Experience Site	Enable Digital Experiences, create a site, and use the Build Your Own (Aura) template per the current installation guide.
5	Customize the Experience Site	Add the survey form component and create the Thank You page with the thank-you component. Verify the Thank You URL and public page access.
6	Create an Organization-Wide Address	Add the sender display name/email, allow the intended profiles, and complete email verification.
7	Activate the Experience Site	Activate the site and confirm the required guest permission set is selected under Members.
8	Assign permission sets	Assign Survey Builder Guest User to the site guest user; assign Survey Builder Admin Permission and NPS Dashboard

Step	Configuration	What to verify
		Permission Set to administrators as required.
9	Update Experience Site URLs	Copy the published Experience Site URL and configure FormPageURL and ThankYouPageURL in the SurveyFormPage Custom Setting.
10	Verify guest-user and email access	Enable the required guest upload setting when file upload is used; confirm Deliverability is set to All Email for environments that should send email.
11	Configure sharing rules	Create the required sharing rules and guest-user sharing configuration for the objects used by the package.
12	Assign production package licenses and test	In Production, assign managed-package licenses to intended users, then test survey load, submission, thank-you page, and email delivery.

3.2 Key Installation Screens

2. Choose a profile for package installation.

[Figure 2: Choose Profile and Install]



Reference: managed-package installation scope and Install action.

1. Navigate to Home → Quick Find Box → Search "Digital Experiences" → Settings".
2. Check the box "Enable Digital Experiences" and click "Save".

[Figure 4: Enable Digital Experiences]

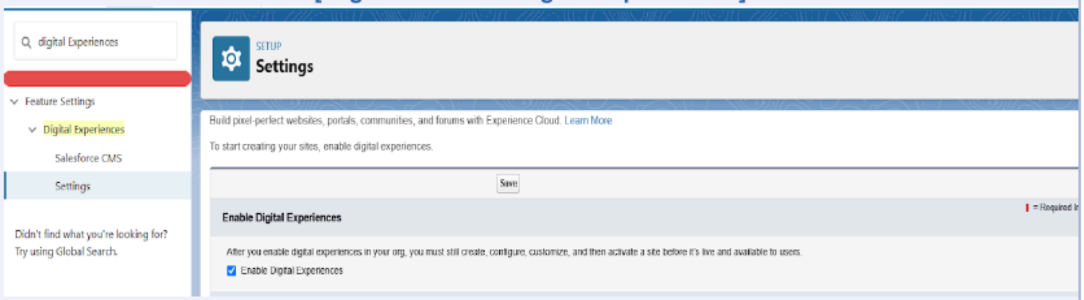


Figure 4: Enable Digital Experiences

Reference: enabling Digital Experiences in Salesforce Setup.

[Figure 22: Organization-Wide Addresses]

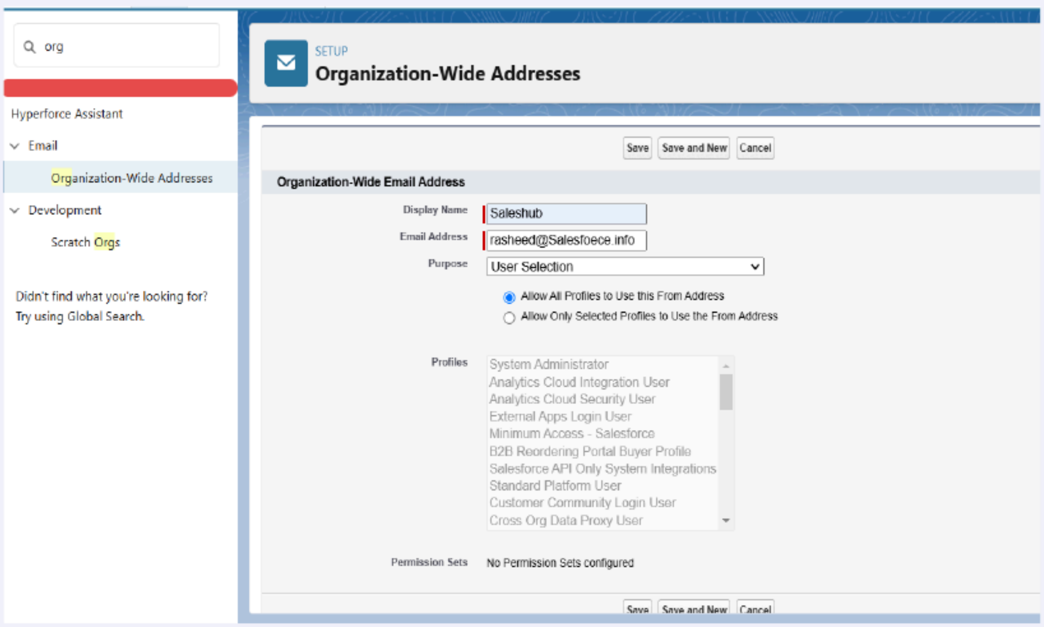


Figure 22: Create Organization-Wide Addresses

Reference: Organization-Wide Address configuration.

[Figure 25: Check Permission Set]

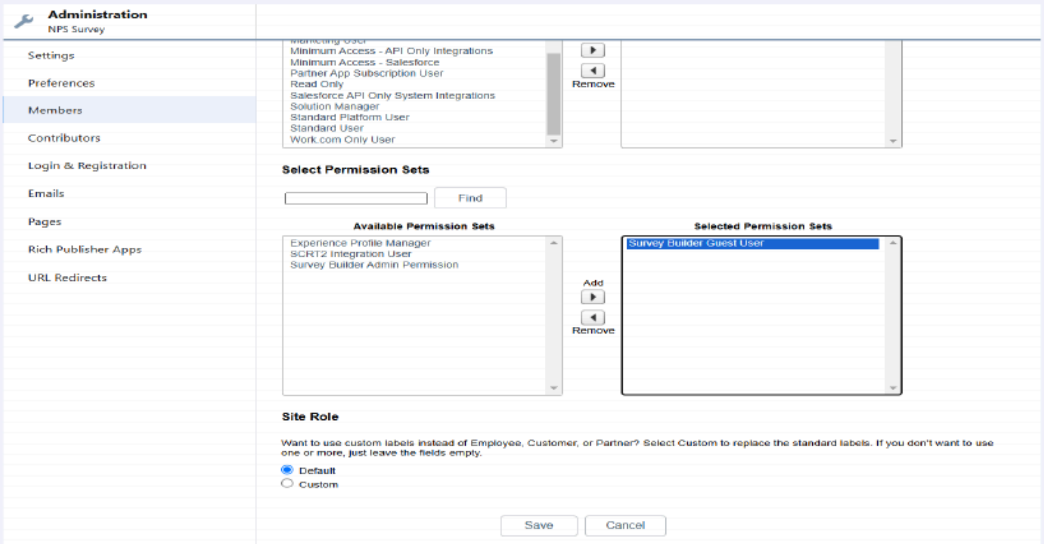


Figure 25: Check Permission Set

Reference: Experience Site member permission-set assignment.

Example: https://abc.develop.my.site.com/nps1/s

[Figure 43: Paste FormPage URL]

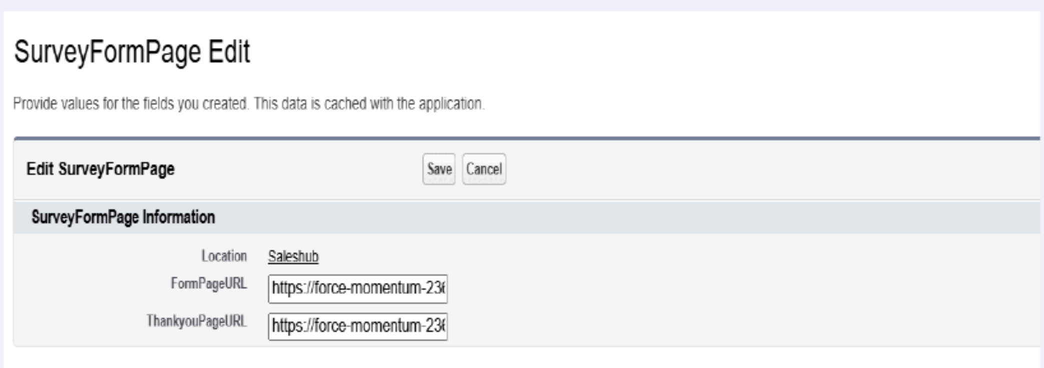


Figure 43: Paste URL

Reference: SurveyFormPage Custom Setting for FormPageURL / ThankYouPageURL.

[Figure 45: Check Guest User Access]

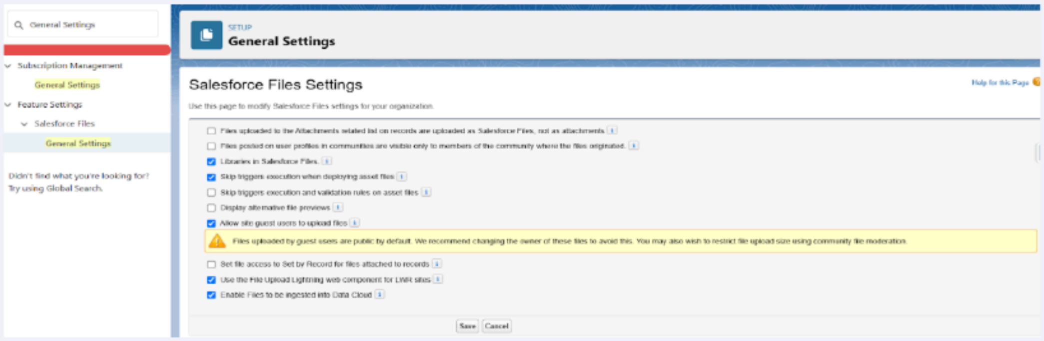


Figure 45: Check The Access

Reference: guest-user file access setting.

- **Field Value:** Created By ID
- **Operator:** not equal to
- **Value:** blank

[Figure 49: Select Field and Share]

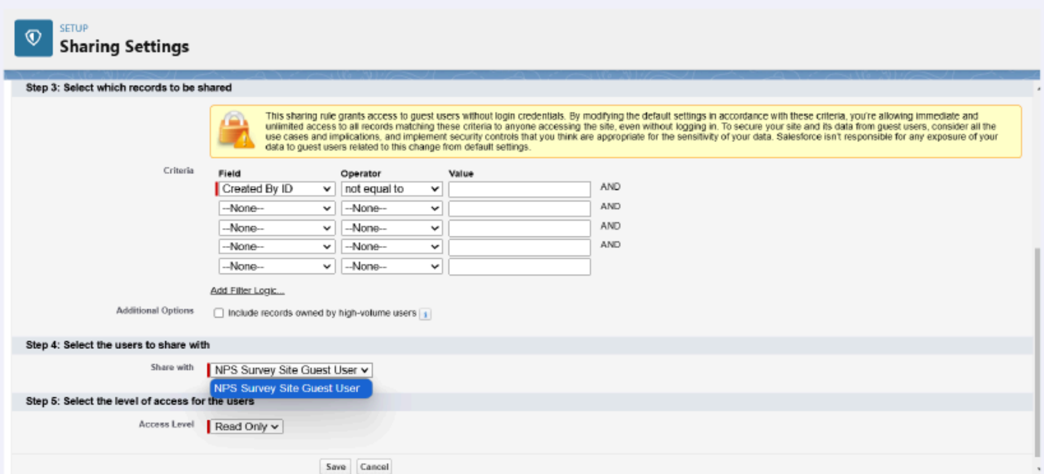


Figure 49: Select a Field and Share it With

STEP12 Configure User License for Production Environment

Reference: guest-user sharing configuration.

3.3 Environment Readiness Checklist

Checklist	Checklist
☐ Managed package installed successfully	☐ Experience Site created, published, and activated
☐ FormPageURL and ThankYouPageURL configured	☐ Organization-Wide Address verified
☐ Guest user and administrator permission sets assigned	☐ Package licenses assigned in Production where required

Checklist	Checklist
☐ Guest access and file-upload behavior validated when applicable	☐ Deliverability configured for the target environment
☐ Required sharing rules configured	☐ Test survey opens from an unauthenticated/public path
☐ Survey submission creates the expected response records	☐ Thank You page displays correctly
☐ Test email reaches the intended recipient	

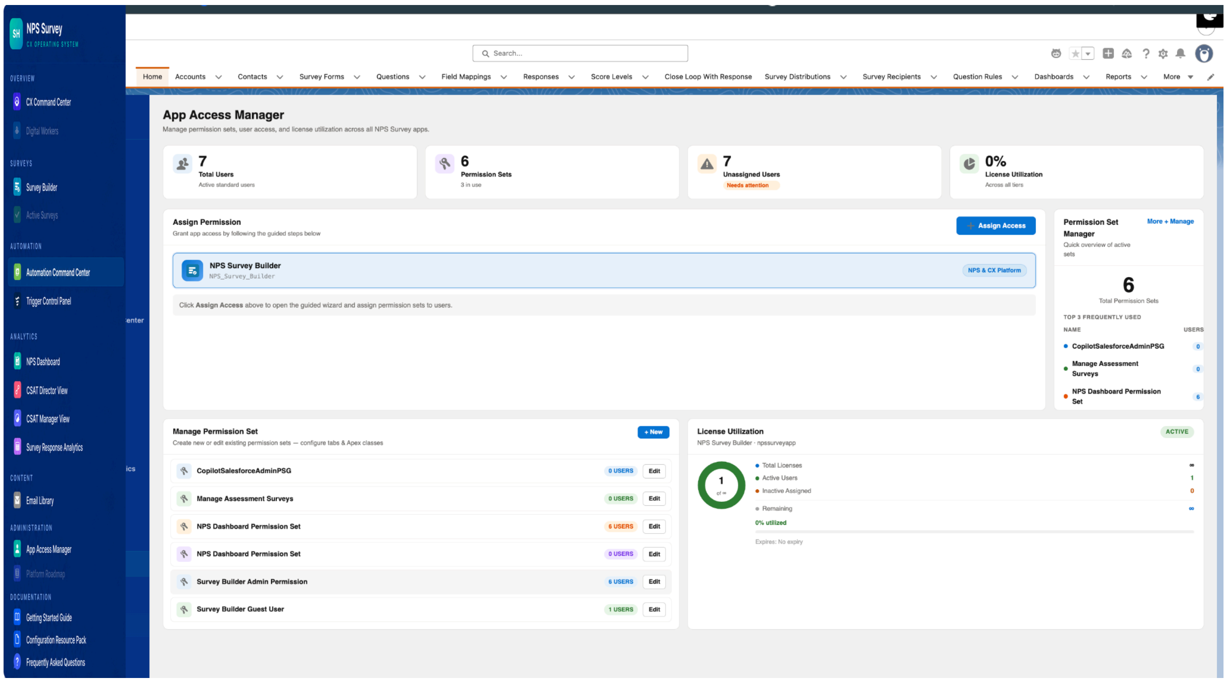
Salesforce UI note

Salesforce Setup labels and page placement can change between Salesforce releases. Follow the configuration intent above and validate the corresponding setting in the current org before production changes.

Back to Table of Contents

4. Access, Permission Sets & App Access Manager

Access is layered. A user may have a package license but still require the correct permission set, feature access, report/dashboard folder access, or guest-user permissions. Use App Access Manager as the primary application-level access workspace, then validate Salesforce-level security when an issue persists.



Current App Access Manager: users, permission sets, unassigned users, and license utilization.

Access layer	Purpose	Typical check
Managed-package license	Allows an eligible production user to use the installed package.	Confirm license is assigned to the user in Production.
Permission set / permission-set group	Grants object, field, Apex, tab, or application privileges.	Confirm the intended NPS Survey permission set is assigned.
App Access Manager	Central application workspace for user assignment and permission-set visibility.	Review unassigned users, permission usage, and Assign Access workflow.
Report/dashboard folder sharing	Controls whether a user can see a Salesforce report/dashboard folder.	Share the correct folder as Viewer/Editor as appropriate.
Guest user profile / public site	Allows respondents to open and submit public survey forms.	Verify object/FLS/Apex access and site/public access configuration.

4.1 Common Access Problems

Symptom	Likely area to check
Guest user cannot open or submit a survey	Guest profile object permissions, field-level security, Apex class access, Experience Site public access, sharing rules.

Symptom	Likely area to check
User cannot see reports or dashboards	Report/dashboard folder sharing and dashboard permission sets.
User sees the app but cannot use a feature	Permission set / App Access Manager assignment, object access, package license.
User cannot see the NPS Dashboard	NPS Dashboard permission set and, when rendering is affected, Lightning Web Security configuration.

Important

Assigning a package license does not by itself guarantee access to every feature. License assignment, permission sets, app access, and Salesforce security must align.

Back to Table of Contents

5. Survey Architecture & Salesforce Context

Survey configuration should begin with the business context. The selected Salesforce object determines which record the survey relates to and influences recipient selection, automation conditions, and downstream analysis.

Object	Use when feedback relates to…	Examples
Contact	An individual respondent or person-level experience	Training, onboarding, attendee feedback, individual relationship survey
Account	An organization or ongoing customer relationship	Relationship NPS, account health, quarterly customer review
Opportunity	A sales, renewal, evaluation, or buying process	Demo feedback, renewal readiness, proposal experience
Case	A support, service, billing, or issue-resolution interaction	Case-resolution CSAT, support effort, escalation follow-up

Design rule

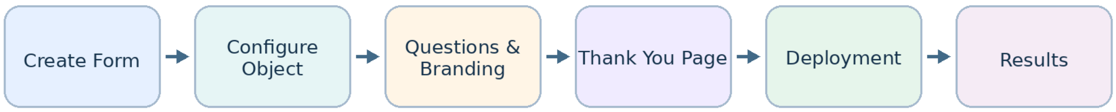
Select the Salesforce object that best represents the event or relationship being measured. This makes automation, response attribution, and reporting easier to understand later.

Back to Table of Contents

6. Survey Builder Configuration Reference

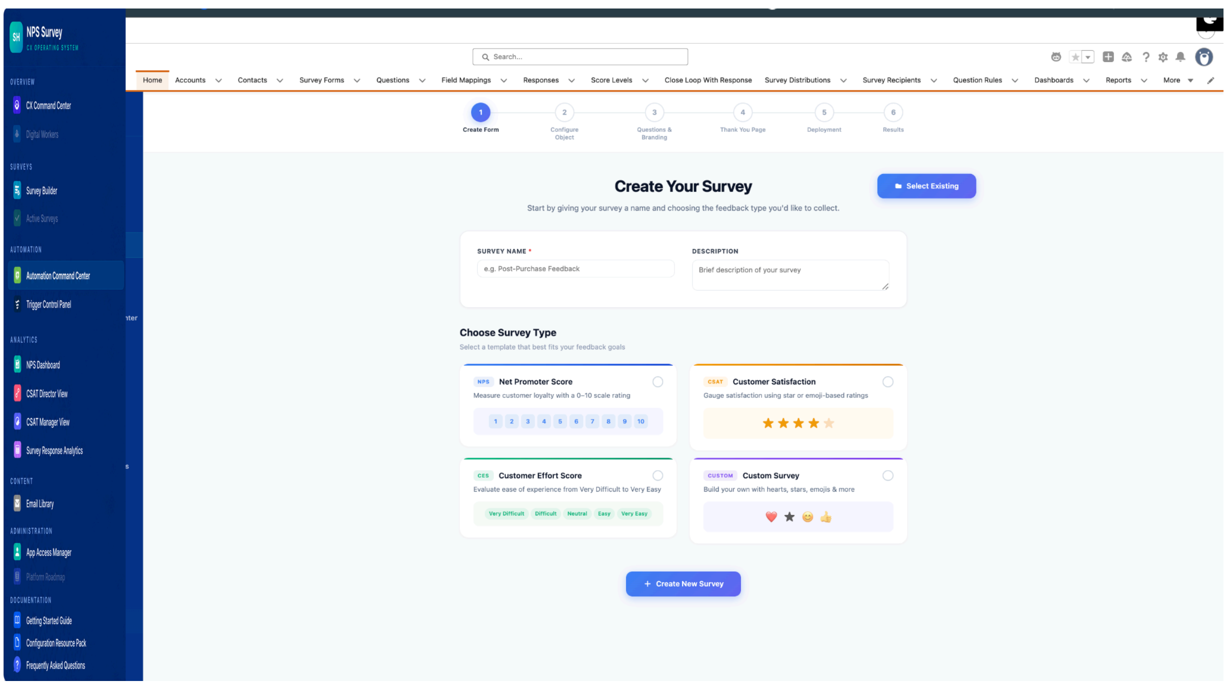
The current Survey Builder uses a guided six-stage journey. This resource pack focuses on the configuration decisions inside that journey rather than repeating the introductory walkthrough in the Getting Started Guide.

Create a Survey from Scratch



Current new-survey workflow: Create Form → Configure Object → Questions & Branding → Thank You Page → Deployment → Results.

6.1 Create Form & Survey Type

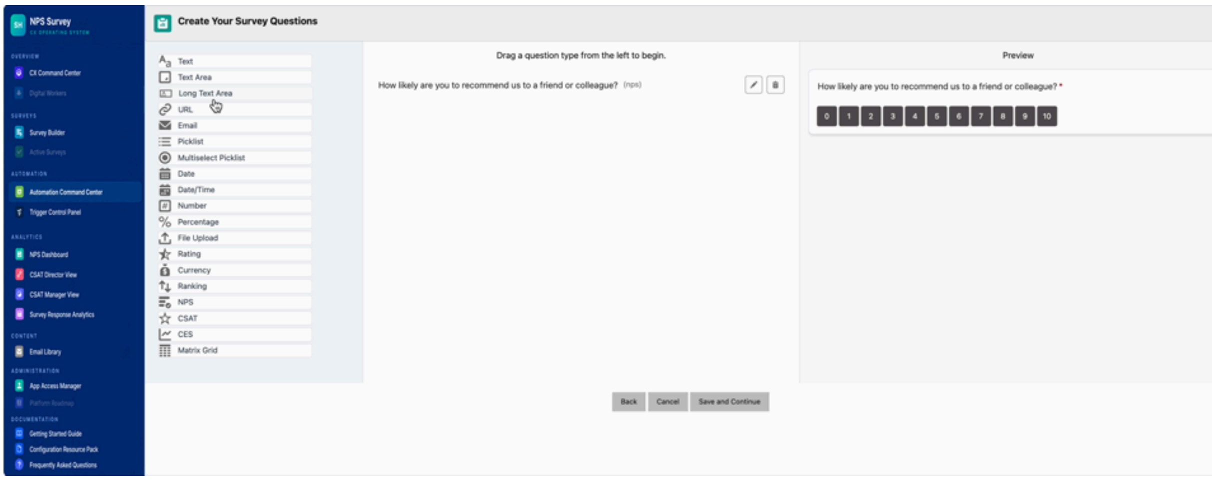


Current Create Form screen with survey name, description, and survey type selection.

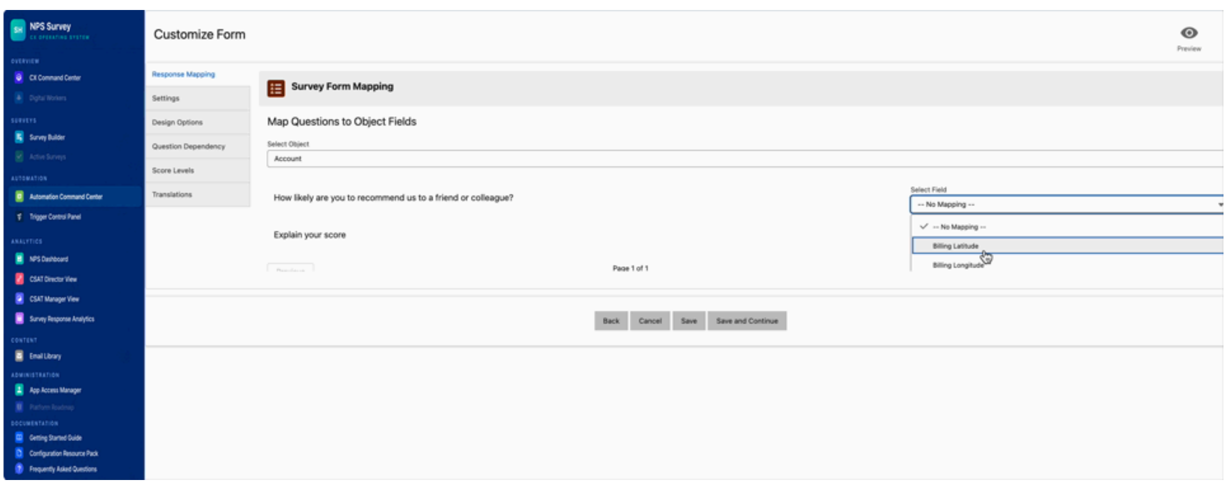
Configuration	Guidance
Survey Name	Use a clear business-facing name that remains understandable in automation, reporting, and existing-survey lists.
Description	Describe the business purpose, audience, or interaction being measured.
NPS	Use for recommendation / relationship loyalty.
CSAT	Use for satisfaction with a specific interaction.
CES	Use for effort / ease of completing an action.

Configuration	Guidance
Custom	Use when the survey is not based on the standard NPS, CSAT, or CES scoring model.

6.2 Questions & Customize Form



Question palette and survey-building workspace.

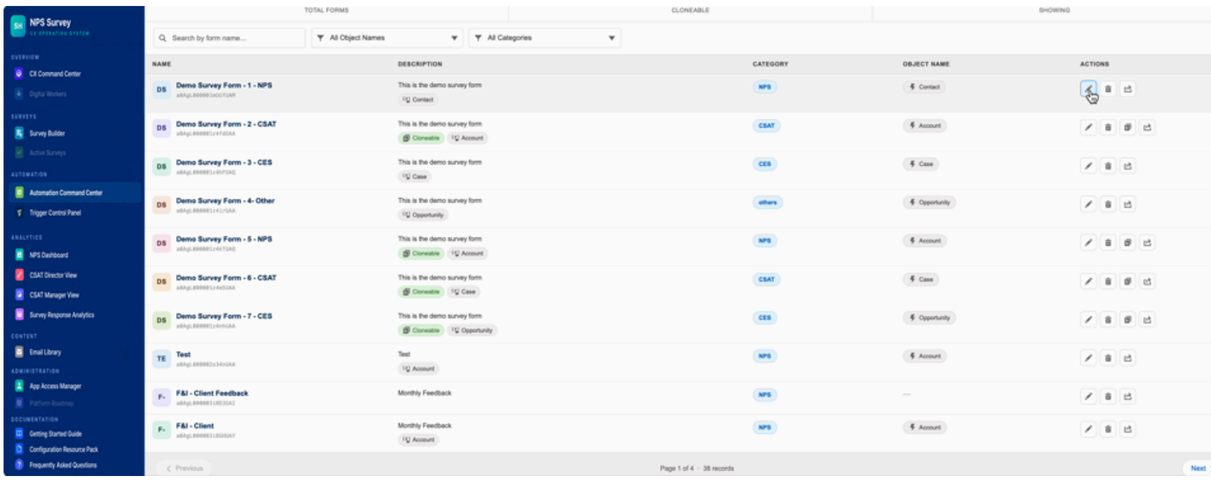


Customize Form: Response Mapping, Settings, Design Options, Question Dependency, Score Levels, and Translations.

Configuration area	What it controls
Response Mapping	Connects survey questions to Salesforce fields when answers need structured field-level use.
Settings	Survey-level behavior such as required-question behavior, multiple responses, availability/timing, and recurrence controls shown in the current org.
Design Options	Visual presentation including colors, fonts, backgrounds, images, and page layout.
Question Dependency	Conditional follow-up logic based on earlier answers.

Configuration area	What it controls
Score Levels	Grouping or interpretation of score ranges for analysis.
Translations	Translated survey content where multiple languages are configured.

6.3 Existing Survey Management



Existing Survey list used to locate and manage previously created forms.

Before editing an existing survey, confirm whether it is actively used, has historical responses, is referenced by automation, or is distributed through an existing email link. Changes to labels, answer choices, logic, or scoring can affect interpretation of future responses.

Action	Configuration consideration
Edit	Review current responses and active dependencies before changing questions, labels, mappings, or logic.
Clone	Use when a new variation should preserve the original survey design and historical interpretation.
Share	Use according to the current platform sharing controls.
Delete	Use only after confirming the survey is not needed by active automation, links, or reporting.

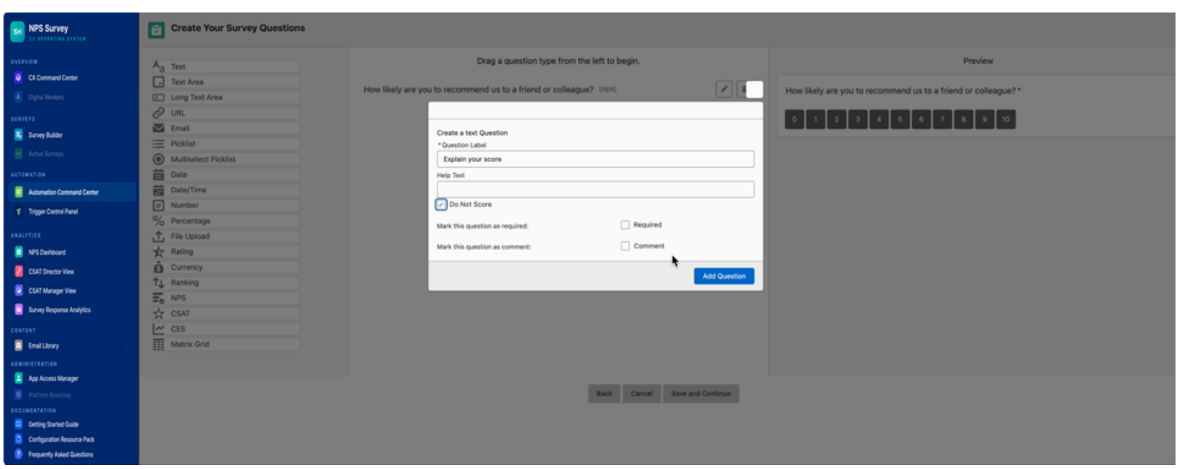
Back to Table of Contents

7. Question Type Reference

Choose the question type that best matches the information being collected. A survey should be designed for clarity first; question types should not be added simply to demonstrate functionality.

Question Type	Best used for
Text	Short, single-line response
Text Area	Short open-ended explanation
Long Text Area	Detailed narrative feedback
URL	Website or resource address
Email	Email address collection or confirmation
Picklist	Single choice from a predefined list
Multiselect Picklist	Multiple choices from a predefined list
Date	Calendar date
Date/Time	Specific date and time
Number	Numeric quantity or count
Percentage	Percentage value
File Upload	Supporting file or screenshot
Rating	General rating scale
Currency	Monetary value
Ranking	Order options by priority or preference
NPS	Recommendation/loyalty score
CSAT	Satisfaction score
CES	Effort/ease score
Matrix Grid	Multiple related rows evaluated against shared columns; see Section 8

7.1 Common Question Configuration



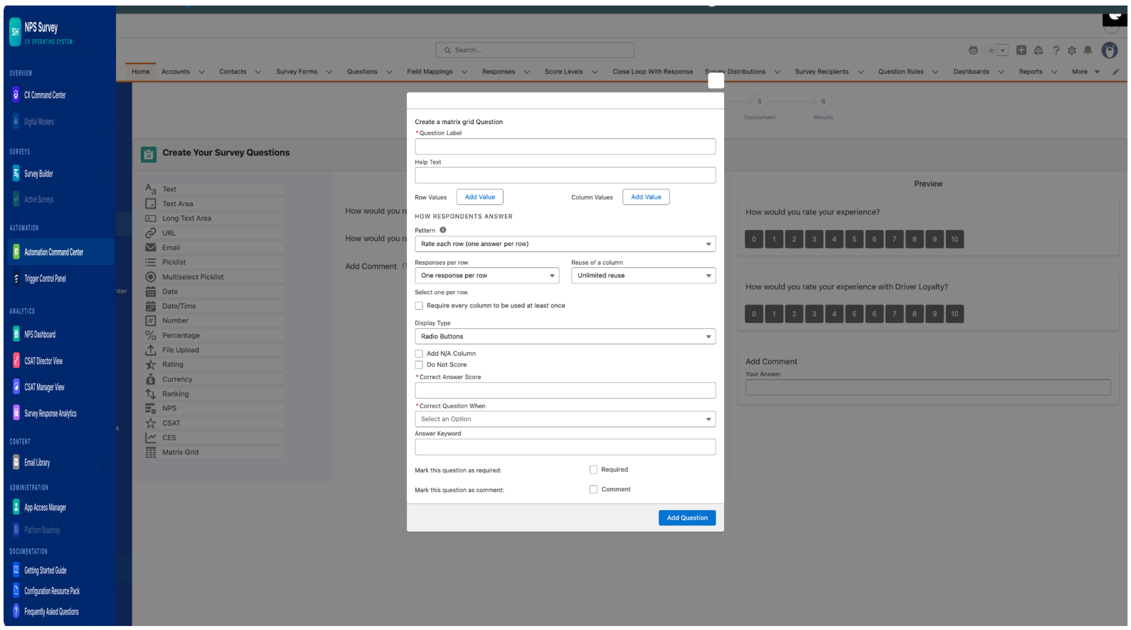
Current question configuration dialog and live survey preview.

Field / option	Purpose
Question Label	Respondent-facing question or prompt. Also important for human-readable reporting.
Help Text	Optional explanatory guidance.
Required	Prevents progression/submission until the question is answered when applicable.
Answer Options	Defines selectable choices for picklists, ratings, scores, ranking, and Matrix Grid.
Comment / additional response	Captures contextual feedback where supported.
Scoring	Controls score contribution where the question type supports scoring.
Live Preview	Shows respondent-facing behavior during configuration.

Back to Table of Contents

8. Matrix Grid — Advanced Configuration

Matrix Grid is used when several related items share the same answer choices. The current configuration separates the respondent display from row and column restrictions, allowing the survey designer to control both appearance and selection behavior.

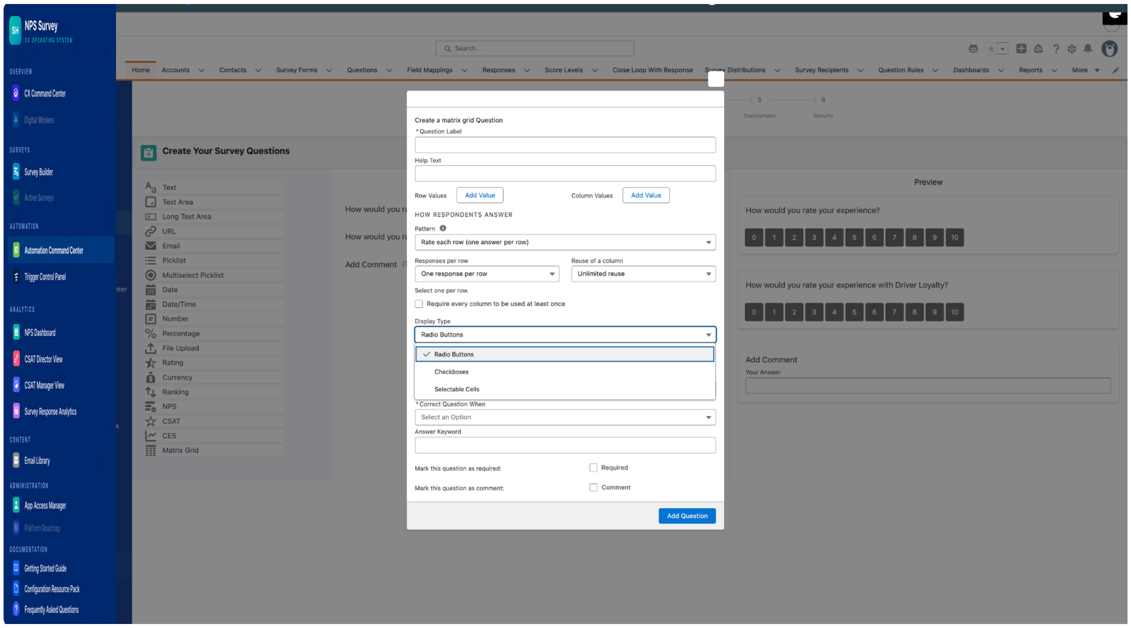


Matrix Grid configuration modal: question label, help text, rows, columns, pattern, response restrictions, scoring, and required/comment options.

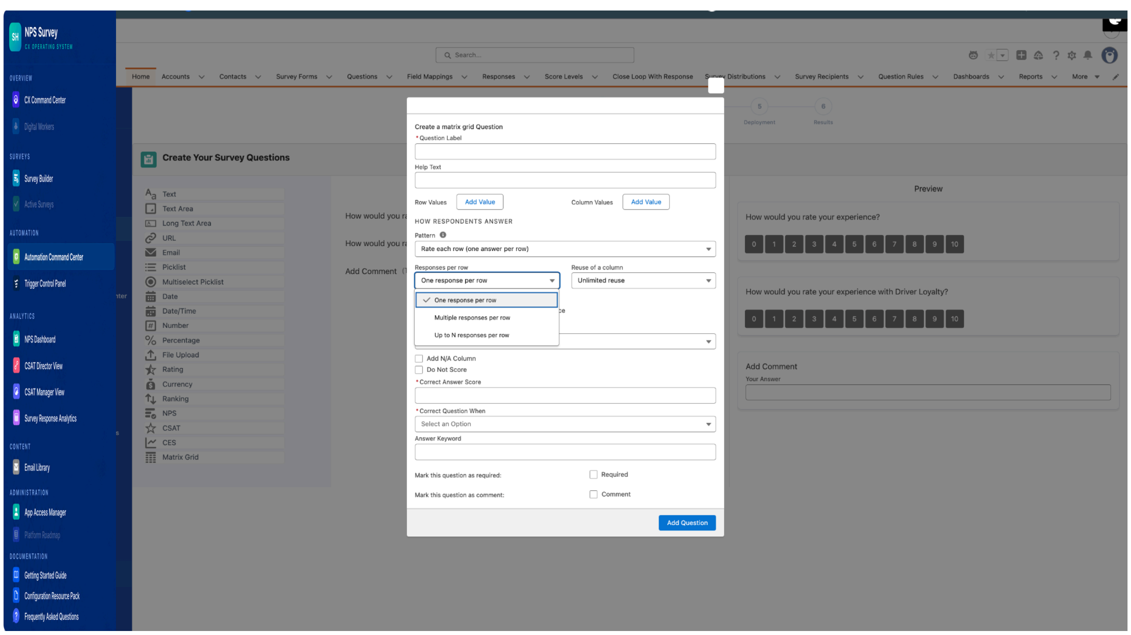
8.1 Core Configuration

Configuration	Behavior
Question Label	Required prompt shown to respondents.
Help Text	Optional instructions.
Row Values	Items being evaluated. Add, edit, delete, or reorder as supported.
Column Values	Shared response choices. Add, edit, delete, or reorder as supported.
Pattern	Provides the starting response pattern; row/column restrictions refine the behavior.
Display Type	Radio Buttons, Checkboxes, or Selectable Cells.
Responses per Row	One response per row, Multiple responses per row, or Up to N responses per row.
Reuse of a Column	Unlimited reuse, One use per column, or Up to N uses per column.
Require every column to be used at least once	Adds a cross-matrix completion constraint when enabled.
N/A Column	Adds a Not Applicable option where the current configuration supports it.
Do Not Score / Correct Answer Score	Controls scoring behavior for applicable use cases.

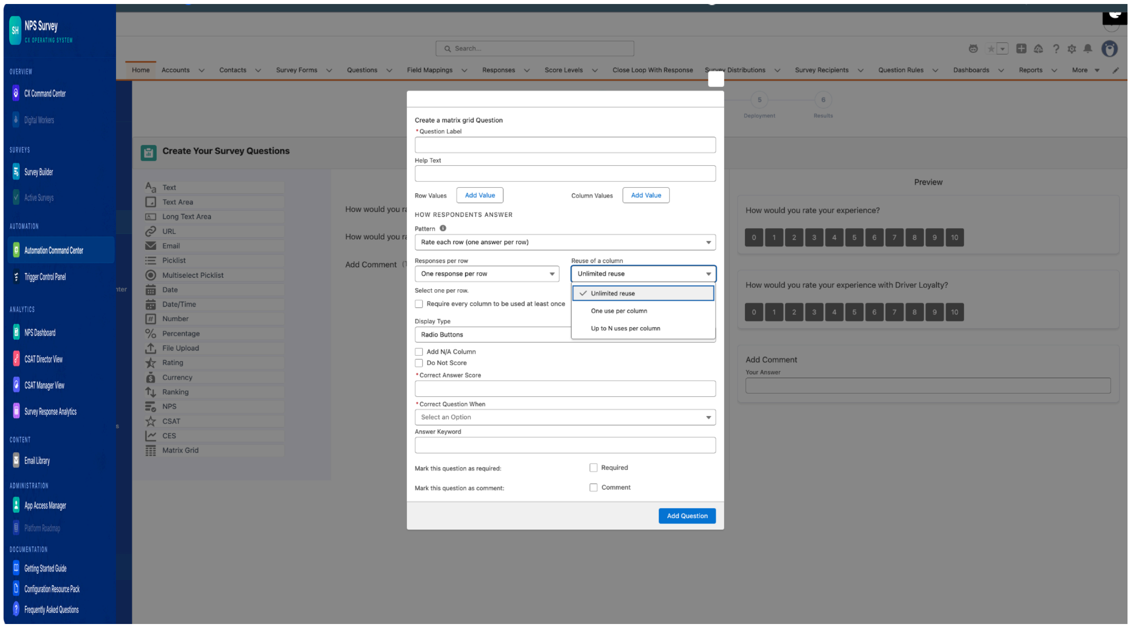
Configuration	Behavior
Required / Comment	Controls required-response behavior and comment behavior where applicable.



Matrix display types: Radio Buttons, Checkboxes, and Selectable Cells.



Responses-per-row restrictions.



Column-reuse restrictions.

8.2 Display Type Guidance

Display Type	Recommended use	Typical rule
Radio Buttons	One answer should remain selected in each row.	One response per row
Checkboxes	Several answers may apply to a row.	Multiple / Up to N responses per row
Selectable Cells	The entire cell acts as the control; useful for single, multiple, or allocation-style selection.	Depends on row and column restrictions

8.3 Validation Rules

Validation area	Expected behavior
Before Add Question	Question Label exists; at least one row and two columns exist; row/column labels are not blank.
Display/rule compatibility	Avoid incompatible combinations such as Radio Buttons with multiple responses per row.
Required Matrix	Validate only the visible required rows; preserve valid answers when an error occurs.
N/A with multiple selection	N/A should behave exclusively within a row when that mode requires exclusivity.
Column uniqueness	For One Use per Column, validate uniqueness across rows before submission.
Changing display type	Warn when a display-type change conflicts with existing restrictions or selections.
Long labels / mobile	Wrap labels and use a respondent layout that preserves readability and touch targets.

Scoring & reporting

When scoring is enabled, store responses by stable question/row/column identifiers. N/A and unscored selections should not contribute to score calculations.

Back to Table of Contents

9. Question Dependency & Branching

Question Dependency allows follow-up questions to appear only when an earlier response meets a configured condition. Use dependencies to keep surveys focused while collecting additional context when it is relevant.

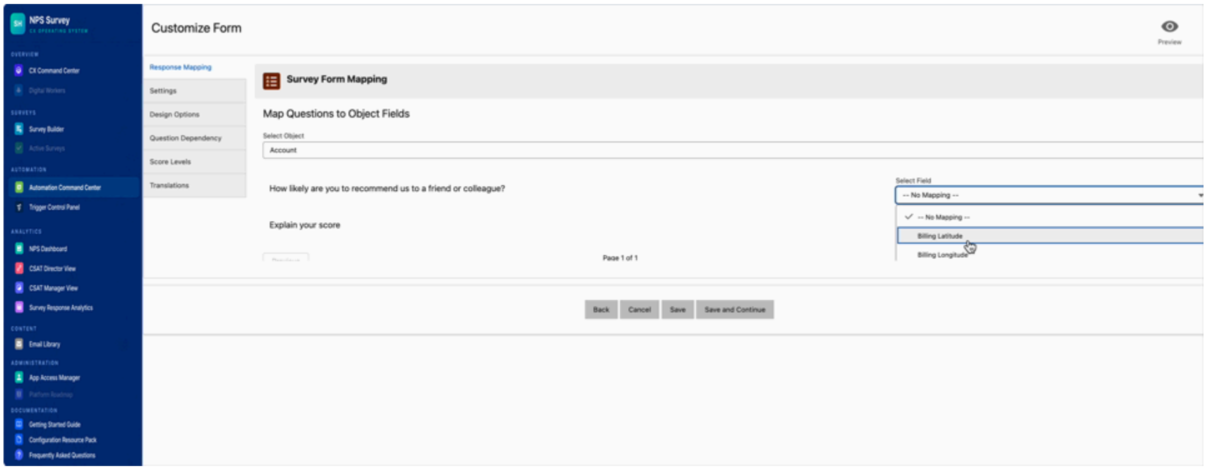
Example	Dependency
Low NPS score	If NPS ≤ configured threshold → show “What would most improve your experience?”
Low CSAT rating	If rating is below target → show service-recovery question or comment field
Selected option	If “Other” or a specific choice is selected → show a follow-up explanation field
Positive response	If a high score is received → optionally ask for advocacy/referral feedback

> **Configuration practice**
> Preview every dependency path before deployment. Confirm that hidden questions do not remain required when their parent condition is not met.

Back to Table of Contents

10. Response Mapping

Response Mapping connects a survey question to a Salesforce field when the submitted answer should be available in structured Salesforce data. Mapping is optional and should be used intentionally.



Current Response Mapping workspace.

Configuration check	Guidance
Object alignment	Map only to a field on the selected survey context/object where the mapping is supported.
Data type compatibility	Confirm the survey answer type is appropriate for the target Salesforce field.
Existing field data	Determine whether the mapped survey response should update/replace existing field data according to the implementation design.
Testing	Submit a test response and verify both the response record and the mapped Salesforce field.
Reporting	Use Question Label and response records for survey reporting even when a question is not mapped.

[Back to Table of Contents]

11. Survey Settings

Survey Settings control behavior that applies across the form. The exact options visible can vary by installed release; configure only options present in the current Survey Builder and validate the result in Preview.

Setting area	Configuration intent
All Questions Required	Makes applicable questions required at the survey level. Review branching to avoid requiring hidden questions.
Allow Multiple Responses	Allows the same respondent/context to submit more than one response when repeat feedback is expected.
Target objects / context	Restricts or identifies the Salesforce objects applicable to the survey.
Close / archive dates	Controls availability or lifecycle dates where the installed version provides these controls.
Allowed response time	Defines how long a respondent can submit when configured.
Recurrence / frequency	Controls repeat behavior where available in the installed release.

Repeated-response use case

Enable multiple responses when the same customer should be able to answer the same survey at different points in time, such as after recurring customer reviews. Each submission should remain a distinct response record.

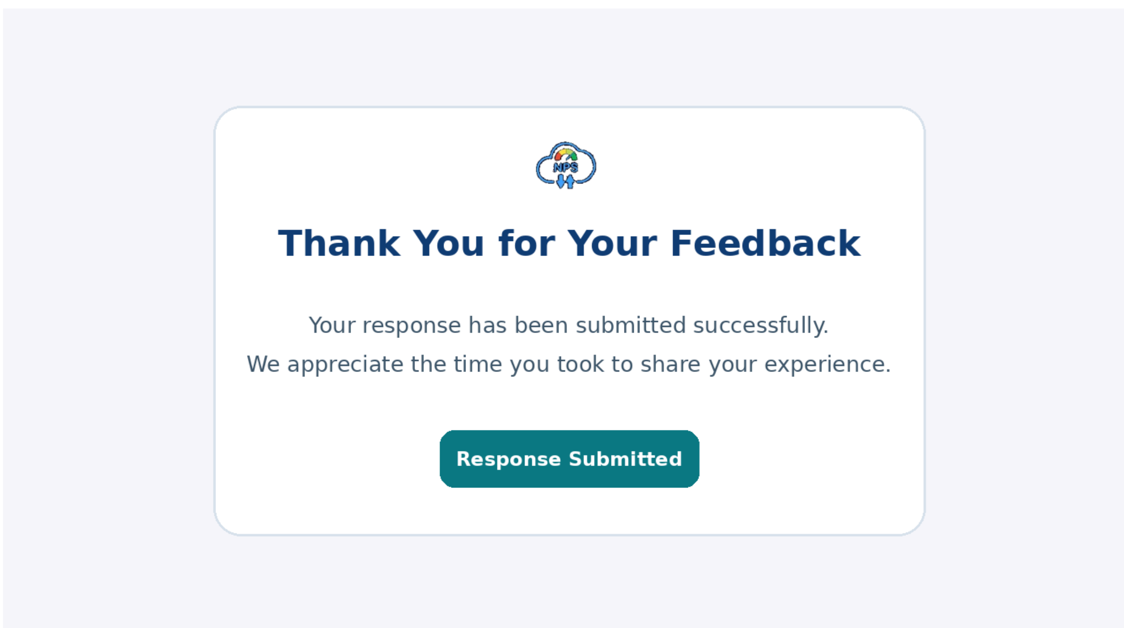
Back to Table of Contents

12. Design, Branding & Thank You Page

Design Options control the respondent-facing presentation. Keep branding consistent with the organization’s approved colors, typography, imagery, and accessibility requirements.

Design control	Examples
Colors	Title, question, answer, section/background colors
Typography	Fonts and sizes for survey content
Layout	Questions per page and page-level presentation
Images	Logo, background image, header image, footer image
Preview	Validate desktop/mobile appearance before deployment

12.1 Thank You Page



Generic Thank You Page example for customer-facing documentation.

Configure the heading and message shown after successful submission. Use neutral, confirmation-oriented language and avoid customer-specific branding in generic templates. Preview the page before deployment.

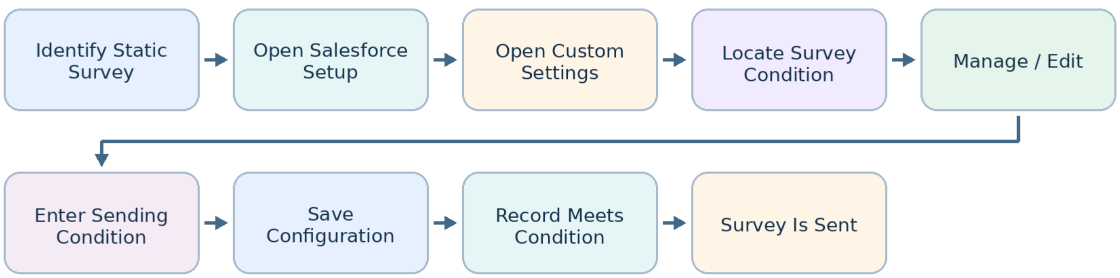
> **Recommended confirmation copy**
> Thank You for Your Feedback — Your response has been submitted successfully. We appreciate the time you took to share your experience.

[Back to Table of Contents]

13. Static CSAT Configuration

Static CSAT is a predefined survey flow whose send condition is configured through Salesforce Custom Settings. The survey is sent automatically when a target record meets the condition stored in the Static Survey configuration.

Static Survey Configuration Flow



Static Survey configuration flow.

13.1 Prerequisites

- Salesforce Setup access (System Administrator or equivalent)
- Permission to view and manage Custom Settings
- Knowledge of the target object and field API names used in the condition

13.2 Configuration Steps

1. Open Salesforce Setup.
2. Search for Custom Settings.
3. Locate “Condition on Static Survey Form”.
4. Click Manage.
5. Edit the configuration record.
6. Enter the sending condition in “Condition For Static Survey”.
7. Save the configuration.
8. Update a sandbox/test record so it meets the condition and confirm the survey is sent.

> **Example condition**
> To send Static CSAT when a Case is closed: Status = 'Closed'

Validation check	Expected result
Field API name	The field exists on the target object.
Text values	Text values are enclosed in single quotes.
Save state	The Custom Setting record is saved successfully.
Sandbox test	A test Case meeting the condition results in a survey send.

Validation check	Expected result
Failure troubleshooting	Re-check condition syntax, record state, trigger status, and recipient data.

Back to Table of Contents

14. VOC Configuration

VOC (Voice of Customer) is configured through Salesforce Custom Settings. The current configuration supports Case, Contact, and Opportunity contexts, allowing the survey to send when the selected record meets the configured VOC condition.

Supported Object	Example use
Case	Send when a service/support condition is met
Contact	Send based on a person-level condition
Opportunity	Send at a sales/renewal milestone such as Closed Won

14.1 Configuration Steps

9. Open Salesforce Setup.
10. Search for Custom Settings.
11. Locate “Condition On VOC Survey”.
12. Click Manage.
13. Edit the applicable record.
14. Enter the condition in “VOC Survey Condition”.
15. Save.
16. Test the condition in a sandbox before production.

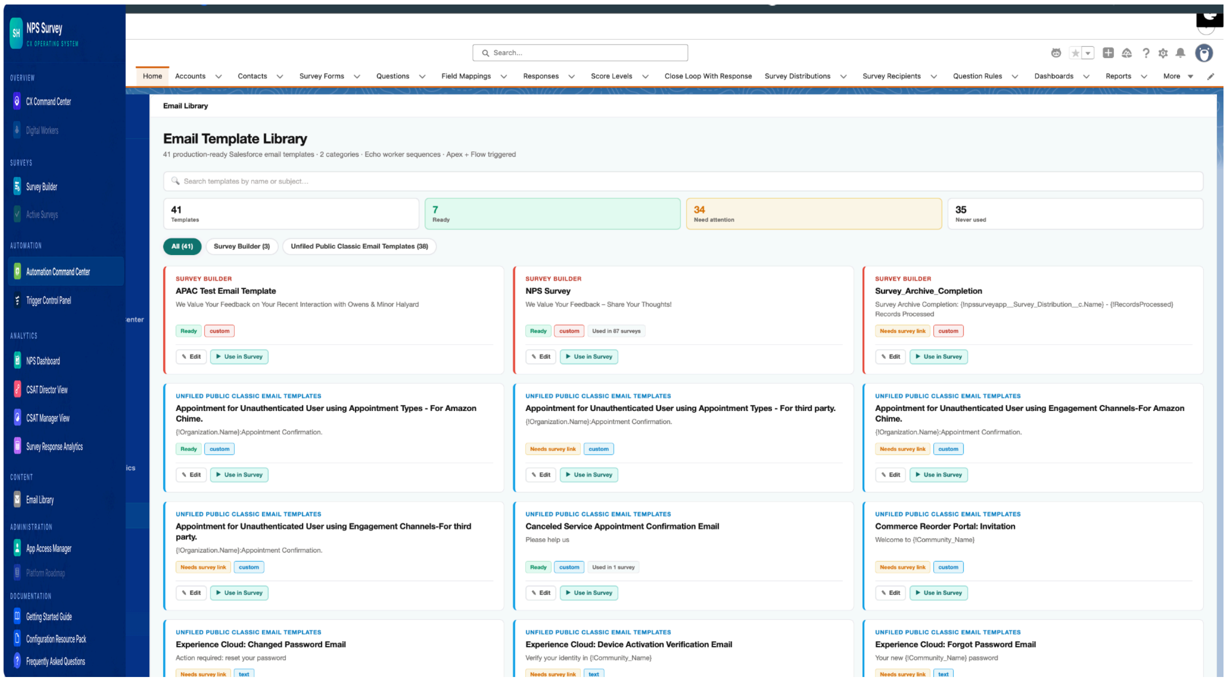
Example	Condition
Case closed	Status = 'Closed'
Opportunity won	StageName = 'Closed Won'

> **Best practice**
> Use the correct Salesforce field API name for the selected object and verify the condition by changing a controlled test record to the qualifying state.

Back to Table of Contents

15. Email Library & Email Template Configuration

The Email Library is the current entry point for reviewing and using survey-related email templates. It provides status visibility and helps connect a template to a survey workflow.



Current Email Template Library.

Email Library state / action	Meaning
Ready	Template is ready for survey use based on current validation.
Needs Attention	Template requires review, commonly because survey-link or configuration requirements are incomplete.
Never Used	Template has not yet been used in a survey workflow.
Edit	Open the template for supported edits.
Use in Survey	Associate/select the template for a survey workflow.

15.1 Classic Email Template Customization

Classic Salesforce email templates may still be used in existing implementations. Treat the Email Library as the current operational entry point, and use Classic Email Template customization only when the implementation requires it. After editing, test merge fields, survey links, sender details, subject lines, and rendering before production use.

15.2 Email Validation Checklist

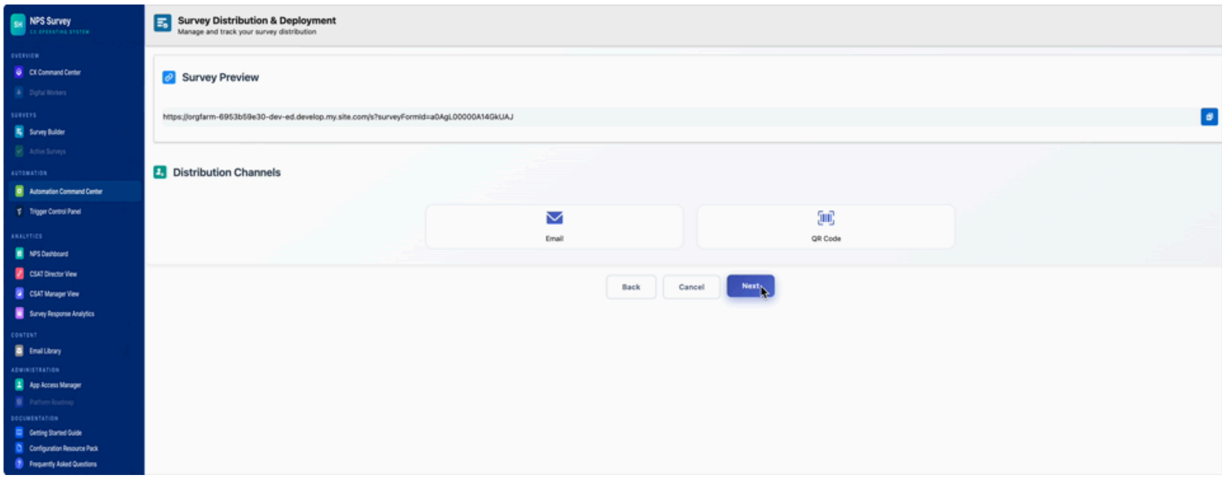
Checklist	Checklist
☐ Correct sender / Organization-Wide Address is configured and verified	☐ Subject line is clear and appropriate

Checklist	Checklist
☐ Survey link or call-to-action points to the intended survey	☐ Merge fields render correctly for the selected recipient context
☐ Template displays correctly in a test inbox	☐ Reminder templates clearly distinguish reminder sequencing where applicable

Back to Table of Contents

16. Deployment & Recipient Configuration

Deployment converts a configured survey into a respondent-facing distribution. The current Survey Builder supports email and QR Code distribution, with survey-link use where available in the deployment experience.



Current Deployment workspace.

Email Distribution Journey

Choose Email → Select / Customize Template → Choose Recipients → Send Now or Schedule

Email deployment sequence.

Deployment decision	Configuration
Email	Select/customize the template, select recipients, and choose Send Now or Schedule.
QR Code	Use for a scannable survey entry point when the audience is not a predefined email recipient list.
Send Now	Deliver immediately after the deployment configuration is ready.
Schedule	Choose a future delivery date/time rather than sending immediately.
Recipient validation	Confirm recipient source, email availability, survey context, and any deduplication/multiple-response settings.

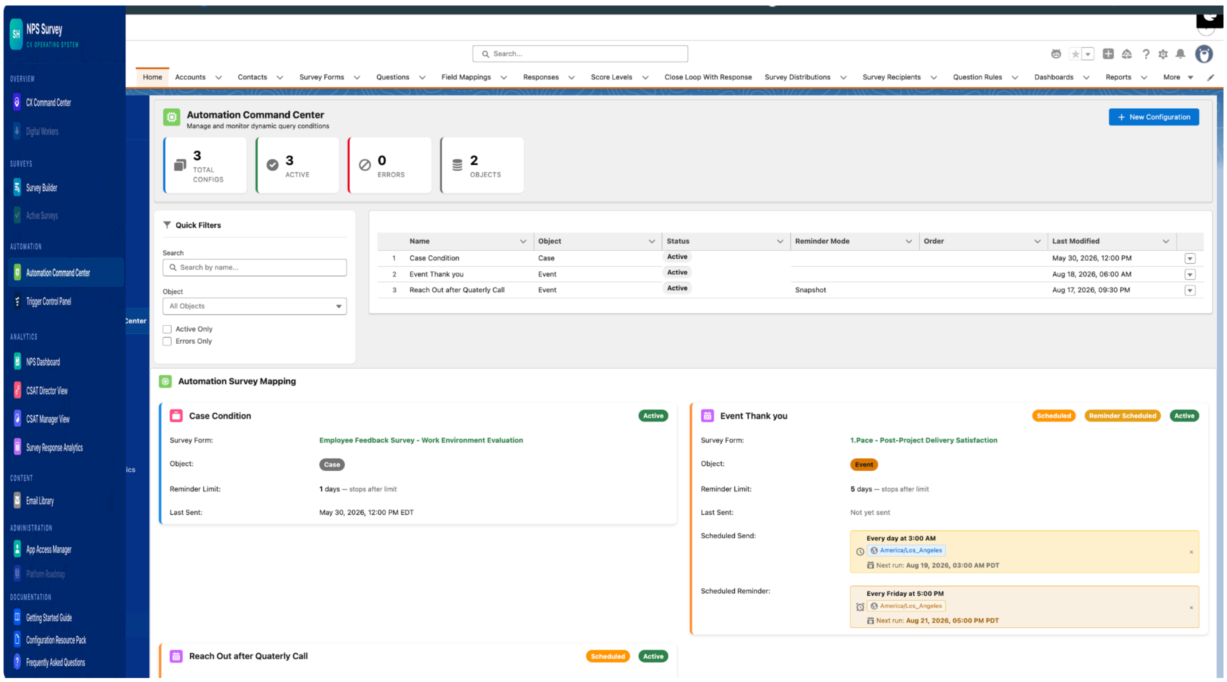
Before broad distribution

Preview the respondent experience, submit a test response, verify the Thank You Page, and confirm that the expected response data is captured before sending to the full audience.

Back to Table of Contents

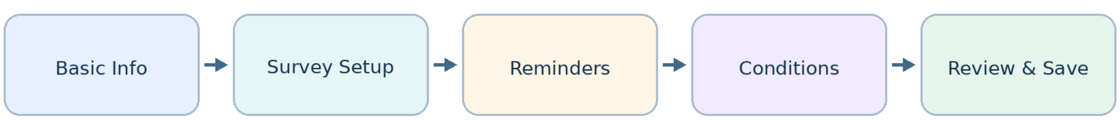
17. Automation Command Center

Automation Command Center manages condition-based survey sends and reminder behavior. The current experience provides monitoring of configurations and a guided setup for Basic Info, Survey Setup, Reminders, Conditions, and Review.



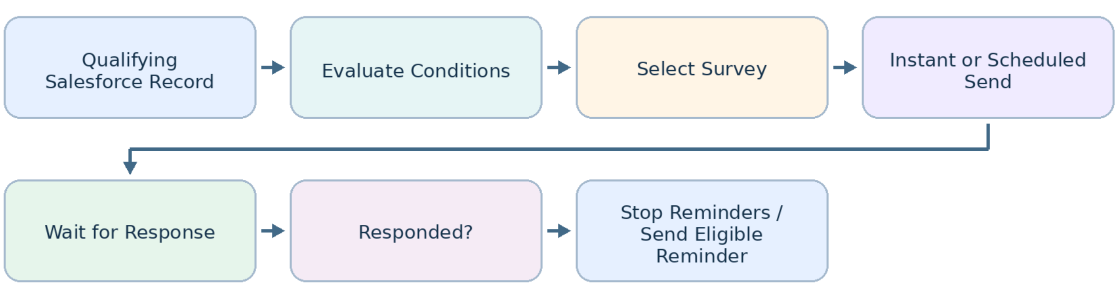
Current Automation Command Center: configuration counts, filters, mappings, status, schedules, and reminder schedules.

Automation Configuration Wizard



Automation configuration wizard.

Automation Flow



Automation behavior from qualifying record through reminder handling.

17.1 Survey Setup — Instant vs Scheduled

Mode	Behavior	Use when
Instant Send	Initial survey is sent as soon as a matching record is found and processed.	Feedback should follow the qualifying event promptly.
Scheduled Send	Initial survey is sent on the configured schedule; each run checks matching records and sends to eligible new recipients.	Batch sending or a defined delivery time is preferred.

17.2 Reminder Configuration

Setting	Behavior
Reminder Limit	Maximum number of reminder emails a non-responder can receive.
Reminder Mode — Live	Existing eligible records use the current reminder limit in the configuration.
Reminder Mode — Snapshot	Each event keeps the reminder limit captured when its initial survey was sent.
Reminder Email Template	Template used for reminder messages; the system can identify reminder sequence in the subject.
Recurring Reminder Schedule	Controls when the reminder job runs; separate from the initial survey schedule.

Reminder eligibility
A reminder is sent only when the recipient has not responded within 24 hours of the initial survey or the previous reminder and the configured reminder limit has not been reached. The initial-send schedule and reminder schedule are independent.

Scheduling note
Configure the recurring reminder job with sufficient separation from the initial send schedule. The current automation guide recommends at least 15 minutes between the initial survey send time and the recurring reminder job.

17.3 Conditions & Review

Configuration	Purpose
Field	Salesforce field evaluated by the condition.
Operator	Comparison such as equals / not equals based on the visual query builder.

Configuration	Purpose
Value	Expected qualifying value.
Logical operator	Connects multiple conditions, such as AND.
Generated Condition Logic	Lets the administrator review the generated query/filter logic.
Preview Matching Records	Validates which records match before saving.
Review & Save	Confirm survey, reminder, and condition logic before activating the configuration.

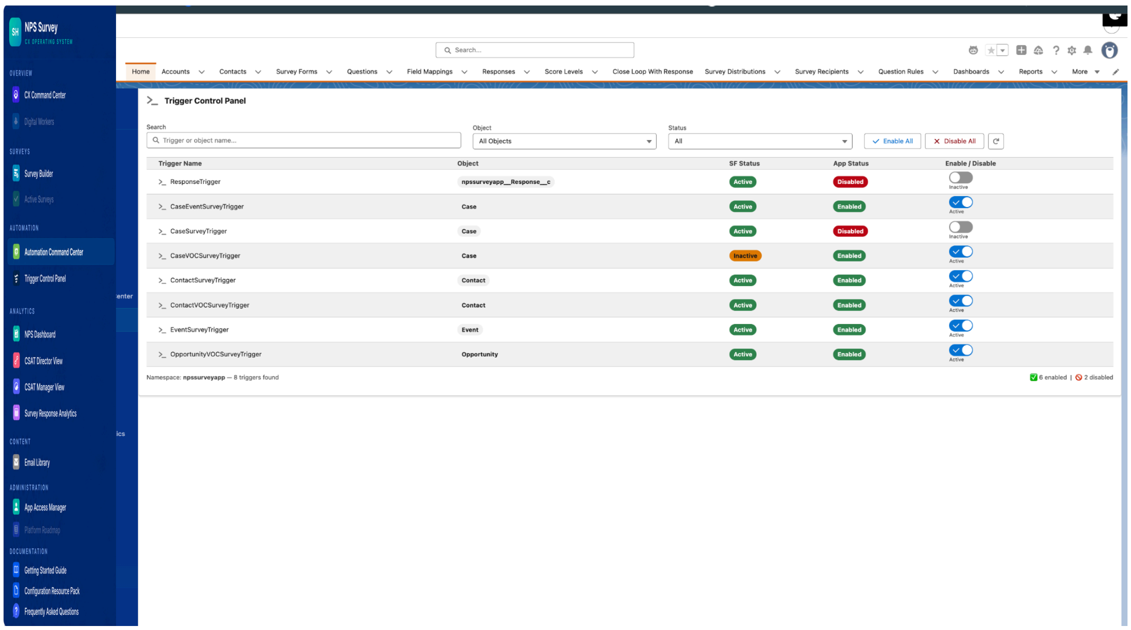
Example

Subject = 'Call' means the automation looks for Event records whose Subject equals Call.

Back to Table of Contents

18. Trigger Control Panel

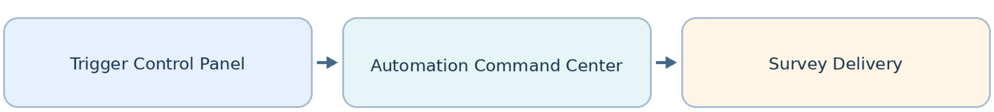
Trigger Control Panel provides centralized visibility and enable/disable control for application triggers that support survey processing. Trigger status should be reviewed whenever an automation or static survey does not run as expected.



Current Trigger Control Panel.

Field / control	Meaning
Trigger Name	Identifies the application trigger.
Object	Salesforce object associated with the trigger.
SF Status	Indicates the Salesforce-side trigger status.
App Status	Indicates whether the application considers the trigger enabled/disabled.
Enable / Disable	Controls application use of the trigger.
Object / Status filters	Narrow the list when troubleshooting or administering multiple triggers.

How Trigger Control and Automation Work Together



Relationship between trigger availability, automation configuration, and survey delivery.

Changing trigger status can affect automated survey processing. Confirm the business impact and test the affected workflow before disabling or re-enabling a production trigger.

19. Response Storage & Multiple Responses

Survey responses are preserved as response records associated with the survey and relevant Salesforce context. When repeat feedback is required, the survey can be configured to allow multiple responses so the same client or contact can submit the survey more than once over time.

Configuration objective	Guidance
Preserve repeated feedback	Use Allow Multiple Responses when the same respondent/context should answer the same survey repeatedly.
Maintain historical submissions	Treat each submission as a distinct response rather than overwriting prior survey feedback.
Preserve context	Store/link the survey, date/time, contact/account context, and question-level responses used by reporting.
Matrix response structure	Store selected cells by stable question, row, and column identifiers; multi-select rows store all selected columns.
Changes after responses exist	Review impact before changing labels, options, scoring, or mapping on a survey with historical data.

Reporting implication

Historical response preservation supports longitudinal analysis, but the specific comparison views available depend on the installed reporting/analytics release. Do not assume a quarter-by-quarter comparison UI unless it is present in the current org.

Back to Table of Contents

20. Reporting & Question-Level Response Access

The “Responses with Question Report” is the standard question-level report referenced in the current documentation. It presents the survey question and submitted answer in separate columns so report users can understand the response without interpreting field API names.

How to access	Action
1. Open Reports	Use the Salesforce App Launcher and select Reports from Items.
2. Search by exact name	Search for “Responses with Question Report”.
3. Review output	Open the report and review the question and submitted response columns.

Report field	Meaning
Question Label	The survey question shown to the respondent.
Mapped Field Value	The answer submitted by the respondent.

If the report is not visible

Check the exact report name, All Reports, and report-folder sharing. Folder access can prevent an otherwise authorized user from seeing a report or dashboard.

20.1 Recommended Report Context

Where the installed report exposes the fields, include survey identity, respondent context, response date, Question Label, Question Type, and submitted Answer/Response so the report remains understandable to business users. Use the available Salesforce report filters appropriate to the installed release.

Current scope

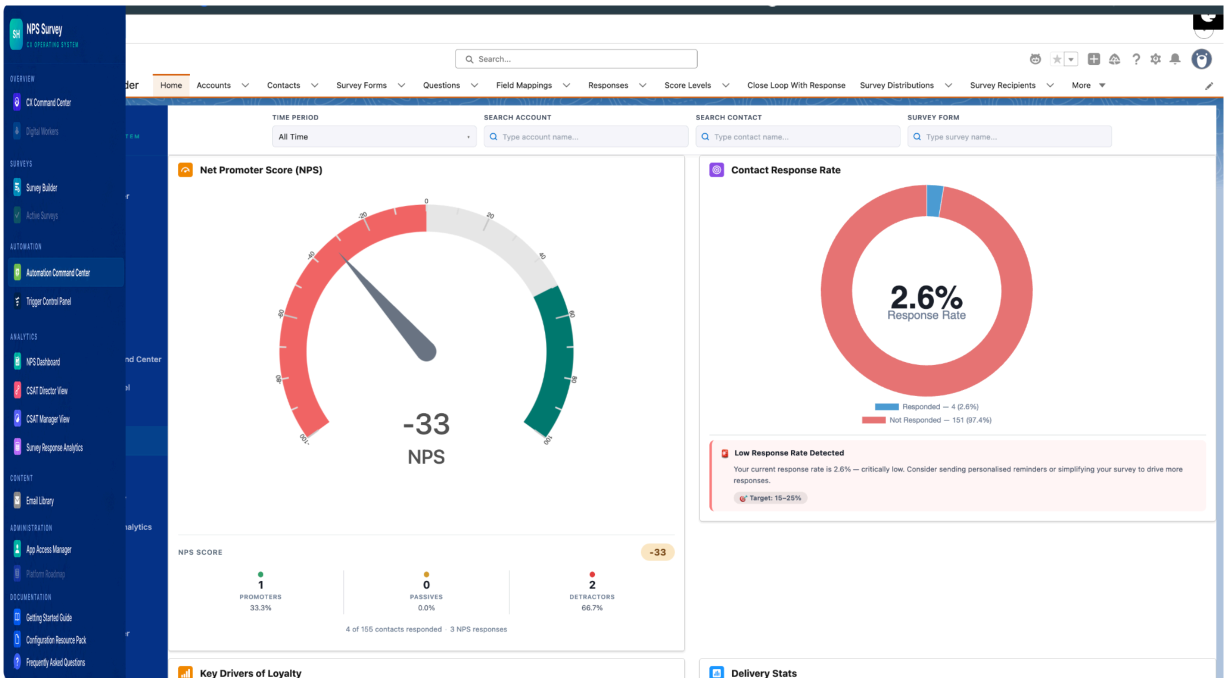
This pack does not claim a built-in side-by-side quarter/year comparison view. If a future release introduces that capability, update this section and the corresponding screenshots before republishing.

Back to Table of Contents

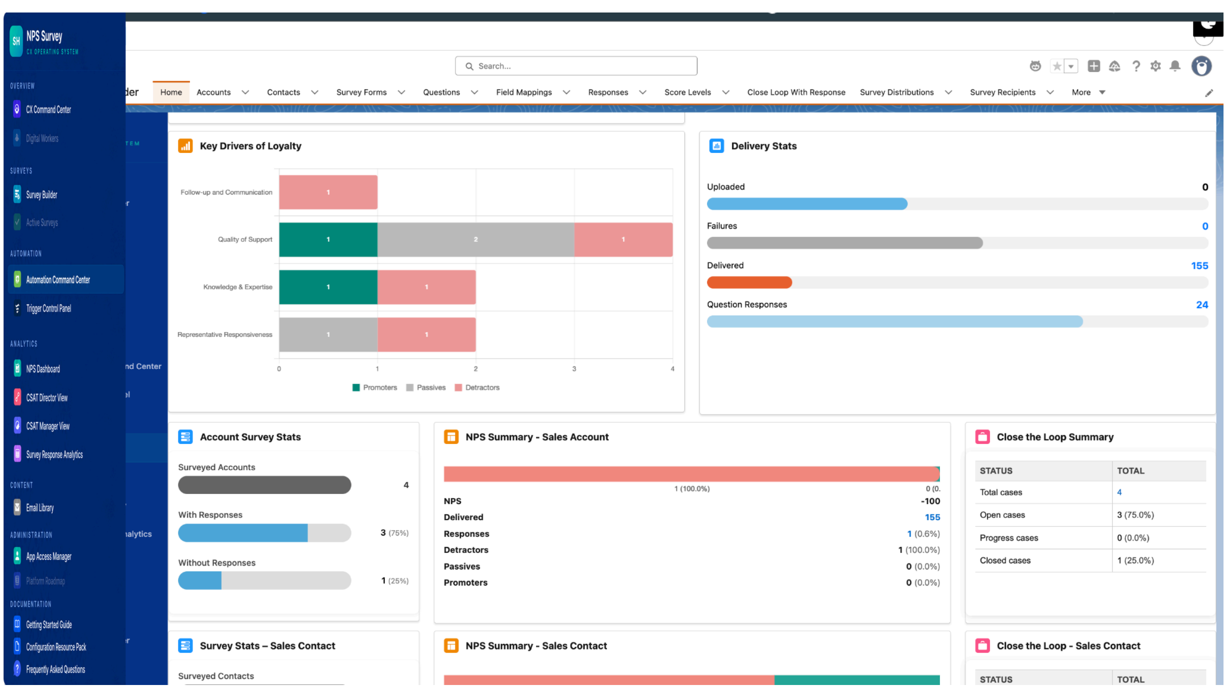
21. NPS Dashboard & Survey Response Analytics

Analytics configuration and validation should focus on the two current experiences documented in this edition: NPS Dashboard for NPS performance and Survey Response Analytics for filtered response exploration. CSAT dashboards are excluded pending the redesigned UI/UX.

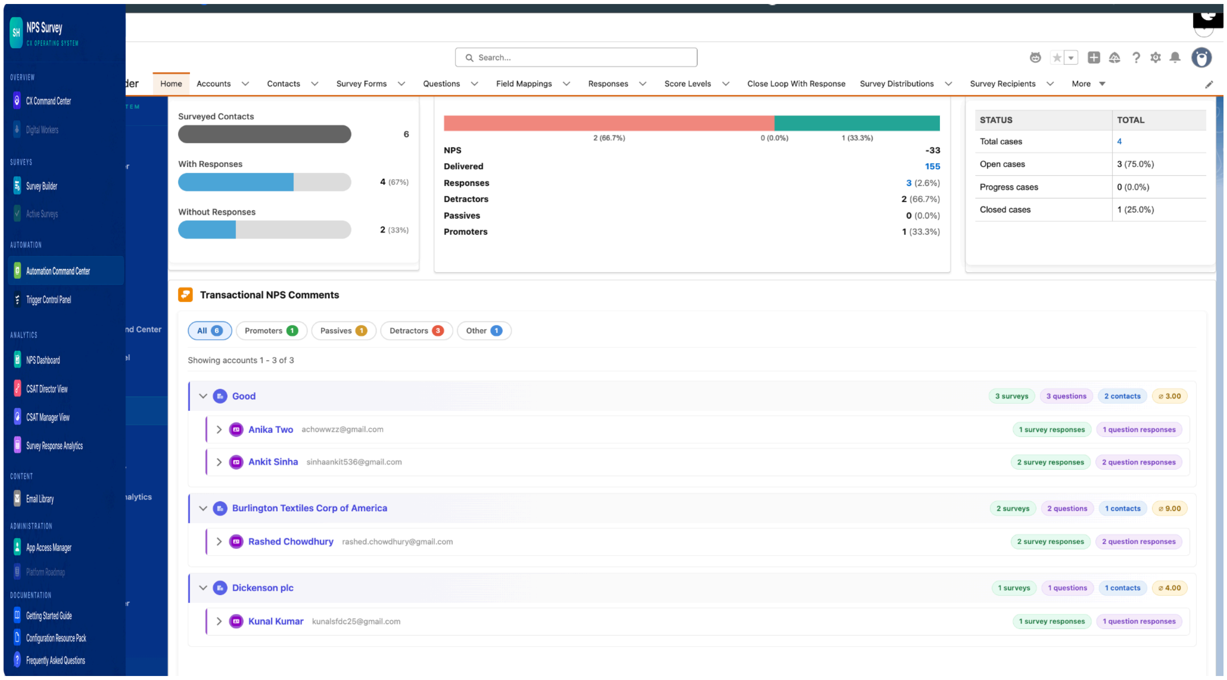
21.1 NPS Dashboard



NPS Dashboard: filters, NPS score, promoter/passive/detractor distribution, and response rate.



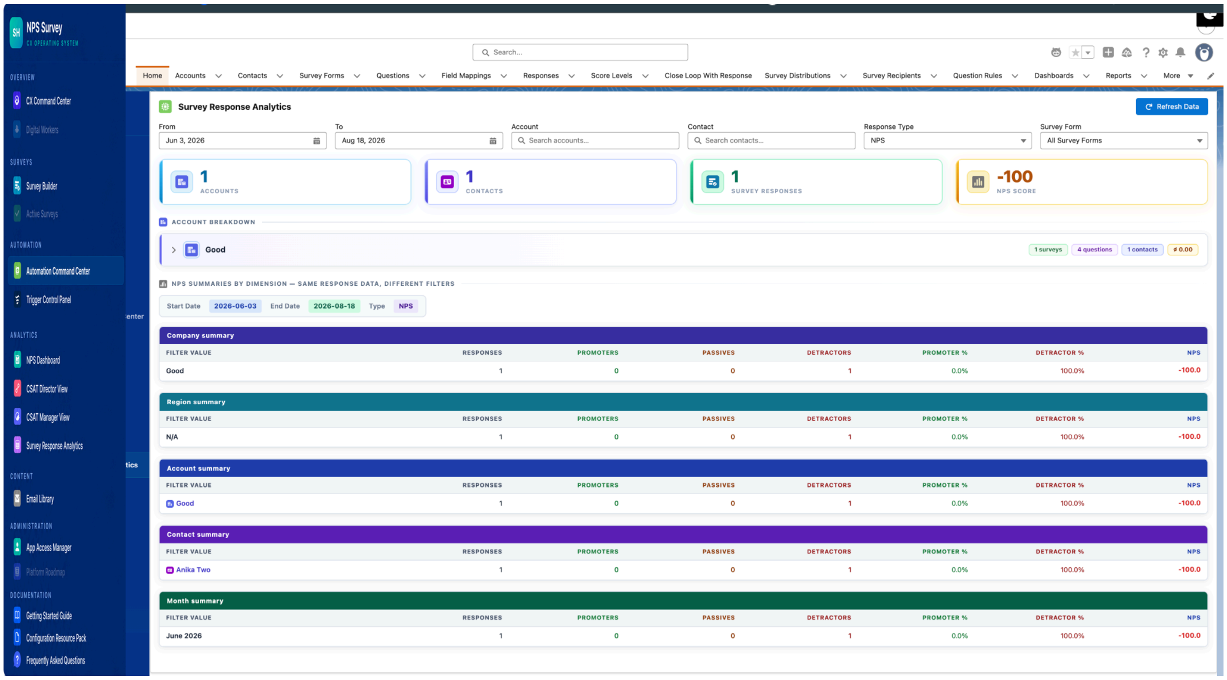
NPS Dashboard: drivers, delivery statistics, account/contact summaries, and close-the-loop status.



NPS Dashboard: transactional comments and account/contact drill-down.

Area	Configuration / validation focus
Filters	Confirm time period, Account, Contact, and Survey Form filters return expected data.
NPS score	Validate promoter/passive/detractor counts against known test responses.
Response rate	Compare delivered/response counts against test distributions.
Drivers / comments	Validate response categories and expandable account/contact details.
Close the Loop	Confirm open/progress/closed case counts reflect expected follow-up records.

21.2 Survey Response Analytics



Survey Response Analytics: date, account, contact, response-type, and survey-form filters with dimensional summaries.

Area	What to validate
From / To	Selected date range returns the intended response population.
Account / Contact	Search filters narrow results to the selected customer/respondent.
Response Type / Survey Form	Filters return the intended response type and form.
Summary cards	Accounts, Contacts, Survey Responses, and score values reflect the filtered set.
Account Breakdown	Expandable hierarchy exposes the expected account/contact response context.
Dimension summaries	Company, Region, Account, Contact, and Month summaries reconcile to the same filtered response population.

22. Testing, UAT & Go-Live

Every implementation should validate configuration from both the administrator and respondent perspectives. The goal is to prove that a qualifying business event leads to the correct survey experience, response storage, and reporting outcome.

22.1 Core UAT Scenarios

Area	Minimum UAT
Installation	Public survey URL opens; Thank You page displays; email can be sent from the target environment.
Access	Admin can open all intended modules; a standard user sees only assigned features; guest user can submit.
Survey Builder	Create a survey; add representative question types; required validation works; preview matches respondent view.
Matrix Grid	Test all current display types and row/column restrictions, including invalid combinations and N/A behavior where configured.
Branching	Follow-up questions appear only when the parent condition is met.
Response Mapping	Mapped answer reaches the intended Salesforce field.
Deployment	Send Now and Schedule behave as expected; QR/link path opens the correct survey.
Automation	Instant/Scheduled initial send, reminder eligibility, Live/Snapshot behavior, and condition matching are validated.
Trigger Control	Relevant trigger is enabled and Salesforce/App status are understood.
Reporting	Question Label and submitted answer appear in the report; analytics filters reconcile to test responses.

22.2 Production Go-Live Checklist

Checklist	Checklist
☐ Package and site configuration validated	☐ Production package licenses assigned where required
☐ Permission sets / App Access assignments completed	☐ Organization-Wide Address verified
☐ Deliverability and email templates tested	☐ Public survey and Thank You URLs validated
☐ Sharing / guest-user access validated	☐ Survey forms reviewed and approved
☐ Automation conditions previewed against matching records	☐ Trigger statuses verified
☐ Test response stored and visible in reporting/analytics	☐ Support owner and escalation path confirmed

23. Troubleshooting Reference

Troubleshoot from the smallest likely configuration dependency outward. Avoid changing multiple settings at the same time; isolate the failing layer, test, then proceed.

Issue	First checks
Installation failed	Org permissions, installation scope, package installation status.
Experience Site not visible	Digital Experiences enabled, site published/activated, public access.

Issue	First checks
Survey does not load	FormPageURL, guest permissions, sharing, Experience Site status.
Survey cannot be submitted	Required questions, Matrix validation, branching, mapped-field constraints, guest/object access.
Email not sent	Deliverability, Organization-Wide Address, recipient email, template/survey link, schedule.
Automation active but nothing sends	Qualifying record, Conditions, Preview Matching Records, trigger status, recipient data, send mode/schedule.
Reminder not sent	24-hour eligibility, reminder limit, Live/Snapshot mode, recurring schedule, response status.
Report/dashboard not visible	Folder sharing, permission set, App Access, NPS Dashboard permissions.
NPS Dashboard rendering issue	Permission set and Lightning Web Security configuration when applicable.

Support handoff

Before escalating, capture the org/environment, survey/configuration name, affected user/record, screenshot, timestamp, expected result, actual result, and the checks already completed.

Back to Table of Contents

24. Customer Configuration Record

Maintain one configuration record per customer/org. This creates a reusable implementation handoff and simplifies future troubleshooting, upgrades, and knowledge transfer.

Configuration Item	Customer / Org Value	Validated By / Date
Salesforce Org / Environment		
Package version		
Experience Site name / URL		
Thank You page URL		
Organization-Wide Address		
Guest User Profile		
Admin permission sets		
Standard-user permission sets		
Production license assignment rule		
Survey objects in use		
Static CSAT condition		
VOC condition(s)		
Automation configuration(s)		
Relevant trigger status		
Primary survey email template(s)		
Primary reports / folders		
Support owner		

24.1 Change Log

Date	Change	Owner	Validation / Outcome

[Back to Table of Contents]

25. Related Documentation & Maintenance

This Configuration Resource Pack is part of the NPS Survey CX OS Documentation area and should be maintained alongside the customer-facing onboarding and help resources.

Resource	Purpose
Getting Started Guide	Customer onboarding and guided platform walkthrough.
Configuration Resource Pack	Detailed installation, administration, advanced configuration, UAT, and troubleshooting reference.
Frequently Asked Questions	Quick answers to common Survey Builder, Matrix, automation, reporting, email, access, and static-survey questions.
Release Notes	Version-specific summary of newly released features and capabilities.
Standalone Installation Guide	Detailed Salesforce installation screenshots and step-by-step installation reference.

Maintenance rule

When a platform feature or Salesforce setup flow changes, update the affected section, replace outdated screenshots, retest the related UAT scenario, and record the change in the document/change log before republishing.

25.1 Final Administrator Checklist

Checklist	Checklist
☐ Installation validated	☐ Access and licenses validated
☐ Survey configuration validated	☐ Static / VOC conditions validated if used
☐ Email and sender configuration validated	☐ Automation and triggers validated if used
☐ Response storage validated	☐ Reports and analytics validated
☐ UAT completed	☐ Customer configuration record updated