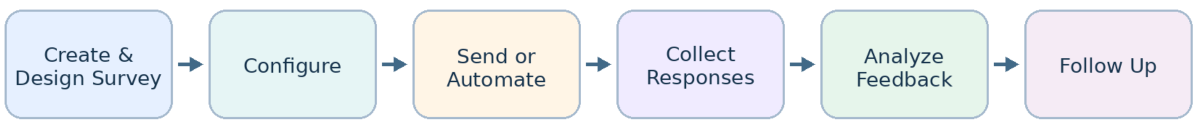
Getting Started with NPS Survey CX OS

Customer Onboarding Guide

A visual, step-by-step guide to navigating the platform, creating and distributing surveys, configuring automation, reviewing NPS and response analytics, and managing access.

Customer Feedback Journey



Prepared by SalesHub | August 2026 | Version 1.0

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1. Welcome to NPS Survey CX OS

NPS Survey CX OS is a Salesforce-based customer experience platform that brings survey creation, distribution, response collection, analytics, and follow-up activities into one connected experience.

The platform provides a structured workflow that helps business users and Salesforce administrators move clearly from survey creation through response analysis and follow-up.

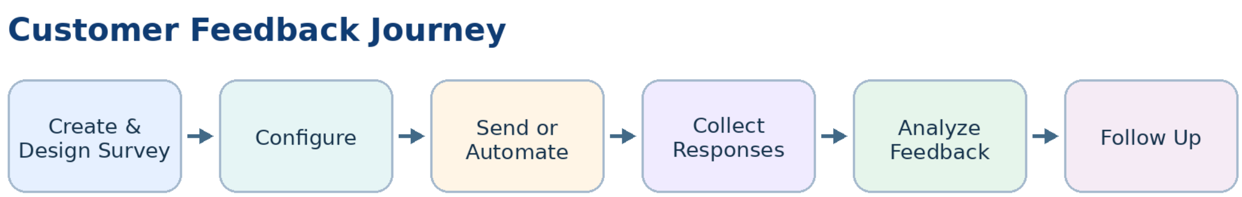

Figure 1. Customer feedback journey in NPS Survey CX OS.

The remainder of this guide follows the same journey: first orienting users to the platform, then walking through survey creation, automation, analytics, content, access management, and practical examples.

2. Platform Navigation

The NPS Survey CX OS side navigation provides access to the main areas of the application. Features are grouped by purpose so users can move from survey creation and automation to analytics, content management, administration, and documentation.

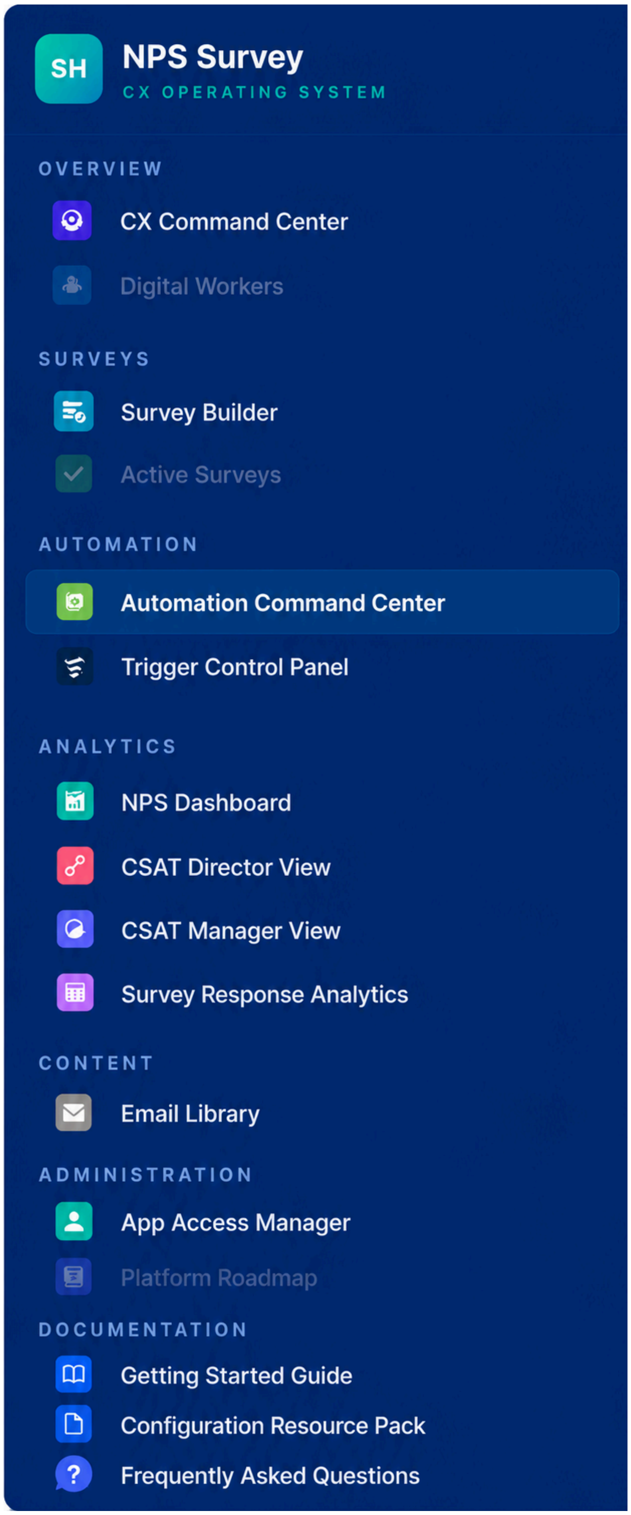

Figure 2. NPS Survey CX OS navigation panel. Opaque items indicate features that are not currently available.

Navigation Area	Feature	Purpose
Overview	CX Command Center	Central overview of customer experience metrics, trends, response activity, and follow-up items.
Surveys	Survey Builder	Create new surveys, work with existing surveys, configure questions and design, deploy surveys, and review results.
Automation	Automation Command Center	Create and manage automated survey delivery and reminder workflows.
Automation	Trigger Control Panel	Review and manage application triggers that support automated survey workflows.
Analytics	NPS Dashboard	Review NPS performance, response activity, drivers, account/contact summaries, comments, and follow-up status.
Analytics	CSAT Director / Manager Views	Available CSAT analytics experiences. Detailed guidance will be added when the redesigned CSAT experience is released.
Analytics	Survey Response Analytics	Explore survey responses using date, account, contact, response type, and survey filters.
Content	Email Library	Review and manage templates used in survey communications.
Administration	App Access Manager	Manage application access, permission sets, users, and license utilization.
Documentation	Getting Started Guide	Provides the guided platform walkthrough contained in this document.
Documentation	Configuration Resource Pack	Provides detailed administrator and configuration reference material.
Documentation	Frequently Asked Questions	Provides answers and troubleshooting guidance for commonly encountered questions.

Upcoming / unavailable items Digital Workers, Active Surveys, and Platform Roadmap appear opaque in the navigation because they are not currently available to users. They are summarized in Appendix D and will be documented in detail when released.

Users can select an item from the left navigation panel to open the corresponding workspace. The consistent grouping supports a natural progression from building a survey, to automating or distributing it, to reviewing results and managing access.

3. CX Command Center

The CX Command Center is the primary overview screen in NPS Survey CX OS. It brings together key customer experience indicators, recent trends, response activity, and follow-up information so users can quickly understand the current state of customer feedback.

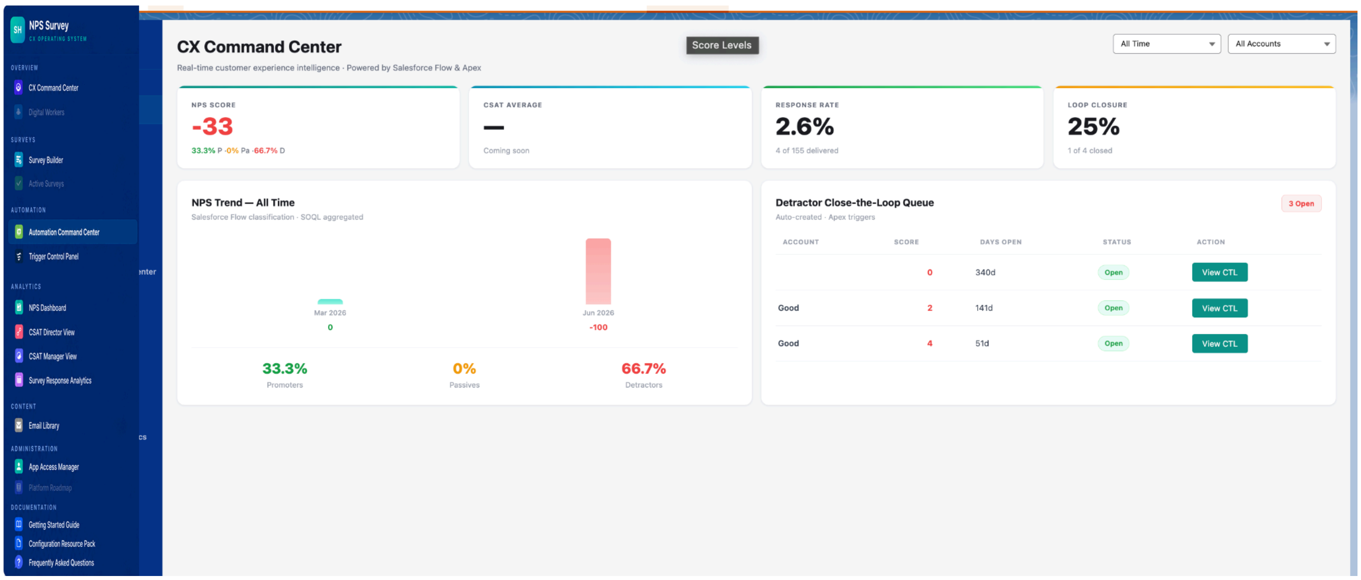

Figure 3. CX Command Center overview.

3.1 What the Screen Shows

Metric	What it represents
NPS Score	Overall Net Promoter Score based on collected NPS responses.
CSAT Average	Average customer satisfaction score when CSAT data is available.
Response Rate	Percentage of delivered survey invitations that resulted in a response.
Loop Closure	Progress in completing follow-up actions associated with customer feedback.

- NPS Trend - shows how NPS performance changes over time for the selected context.
- Detractor Close-the-Loop Queue - highlights feedback that may require follow-up action.
- Filters - allow the overview to be refined by available criteria such as time period and account.

3.2 Recommended Review Flow

CX Command Center Review Flow

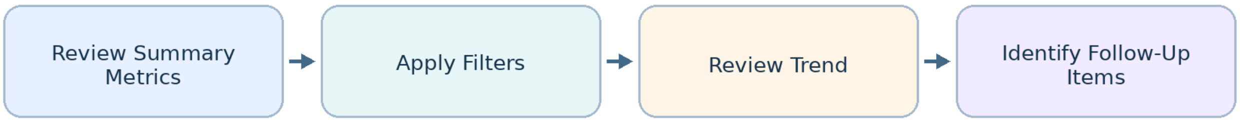

Figure 4. A practical review sequence for the CX Command Center.

A user can begin with the summary metrics, apply relevant filters, review trends, and then move into follow-up items or detailed analytics when additional context is needed.

4. Survey Builder

The Survey Builder is the primary workspace for creating, configuring, designing, distributing, and reviewing surveys. It provides a guided workflow so users can move from initial survey setup through deployment and results within the same experience.

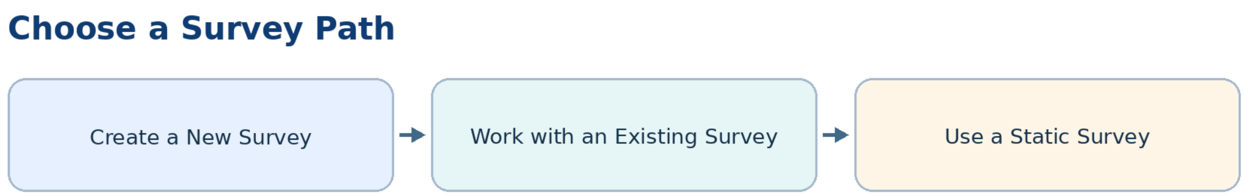

Figure 5. Three survey paths covered in this guide.

4.1 Survey Builder Overview

When opening Survey Builder, users can create a new survey, work with an existing survey, or use a static survey configuration. The first two paths use the guided Survey Builder experience; static surveys currently follow a separate Salesforce configuration process.

Path	When to use it
Create a New Survey	Build a survey from the beginning and configure its questions, design, distribution, and response settings.
Work with an Existing Survey	Locate an existing survey to review, edit, clone where available, share, or continue working with it.
Static Survey	Use an existing Static CSAT or VOC configuration that is triggered by Salesforce conditions.

4.2 Create a Survey from Scratch

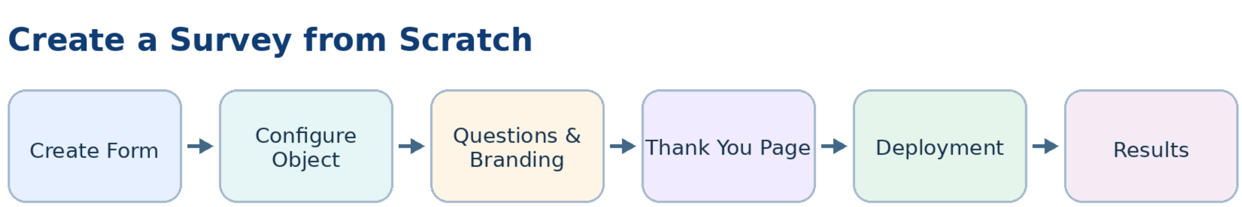

Figure 6. Six-stage survey creation journey.

4.2.1 Create Form

The Create Form step establishes the basic identity and purpose of the survey. Users enter a clear survey name, an optional description, and select the survey type that best matches the feedback being collected.

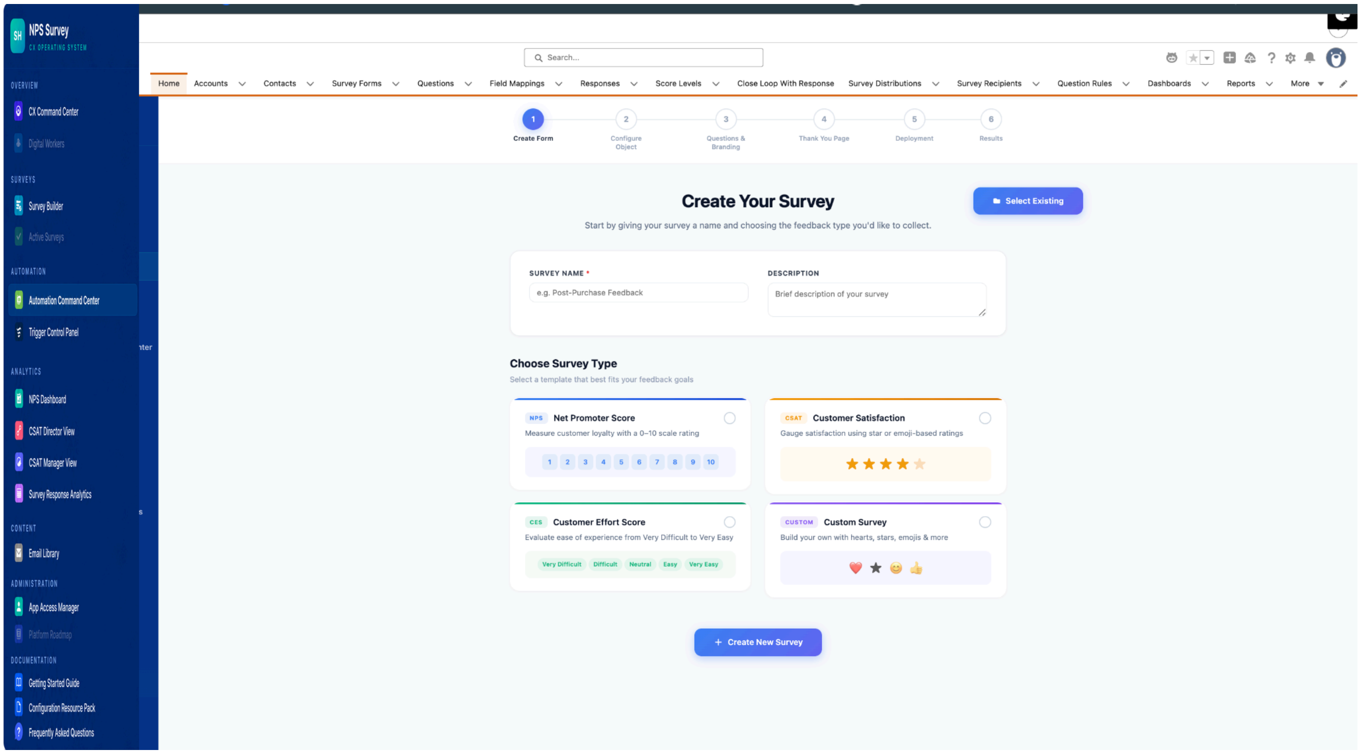

Figure 7. Create Form screen with survey name, description, and survey type options.

Field	Description
Survey Name	A clear name that helps users identify the survey later.
Description	A short explanation of the survey purpose or intended use.
Survey Type	Choose the available survey type that best matches the feedback being collected.

Naming guidance Use a name that reflects the business purpose, audience, or interaction being measured. Clear names make surveys easier to locate later when editing, automating, or reviewing results.

4.2.2 Configure Object

The Configure Object step connects the survey to the Salesforce record context that the feedback relates to. This keeps responses associated with the appropriate customer, transaction, or service interaction.

Salesforce Object	Typical use
Contact	Feedback associated with an individual respondent, user, attendee, or customer contact.

Salesforce Object	Typical use
Account	Relationship-level or organization-level feedback, including account health or business reviews.
Opportunity	Feedback connected to sales, renewal, evaluation, or opportunity-related experiences.
Case	Feedback following support, service, billing, or issue-resolution interactions.

The selected object should reflect the business context the survey is intended to measure. For example, a case-resolution survey would typically be associated with a Case, while a relationship survey may be associated with an Account.

4.2.3 Questions & Branding

The Questions & Branding step is where users build the survey content and refine how the survey behaves and appears to respondents.

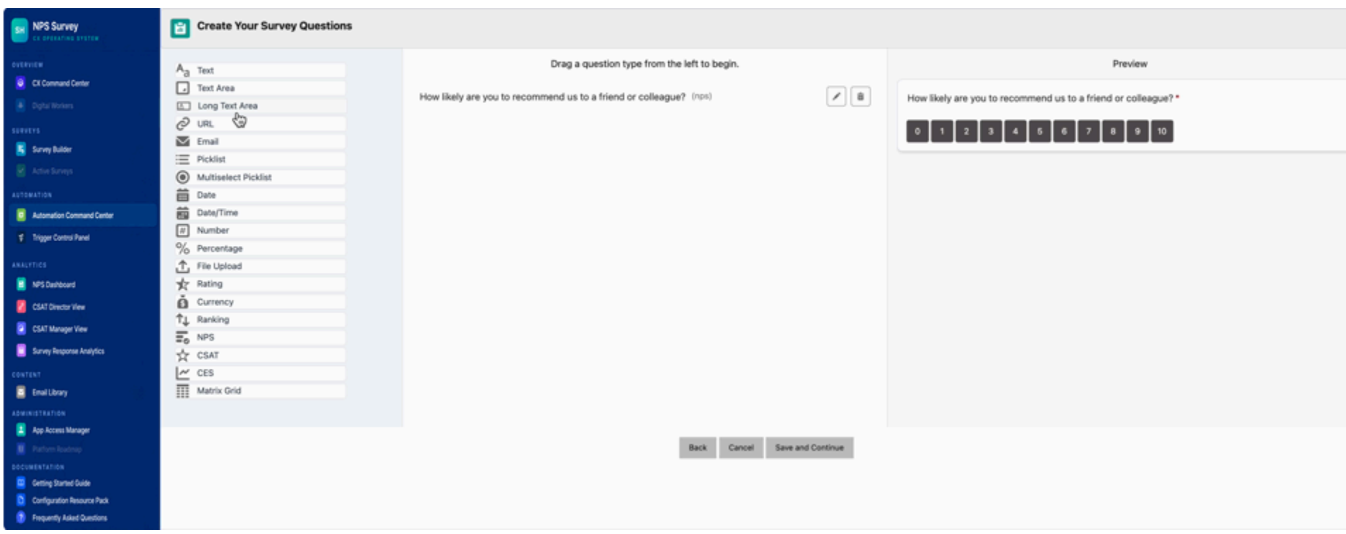

Figure 8. Question palette, survey canvas, and respondent preview.

Question Types

Question Type	Best used for
Text	Short, single-line response such as a reference, title, or brief answer.
Text Area	Short open-ended explanation or comment.
Long Text Area	Detailed feedback or a longer narrative response.
URL	Website or webpage address.
Email	Email address collection or confirmation.

Question Type	Best used for
Picklist	One answer from a predefined list.
Multiselect Picklist	More than one answer from a predefined list.
Date	Calendar date.
Date/Time	A specific date and time.
Number	Numeric value such as quantity, count, or volume.
Percentage	Percentage value such as adoption, completion, or utilization.
File Upload	Supporting files, screenshots, documents, or other attachments.
Rating	General rating using the configured rating scale.
Currency	Monetary value such as budget, cost, or estimated impact.
Ranking	Arrange choices in order of importance or preference.
NPS	Net Promoter Score response measuring recommendation intent.
CSAT	Customer Satisfaction response for an interaction, service, or experience.
CES	Customer Effort Score indicating how easy or difficult an experience was.
Matrix Grid	Multiple related rows evaluated against a shared set of answer columns.

Matrix Grid contains advanced display and response-rule options. See Appendix A - Matrix Grid Questions

Configuring a Question

After adding a question from the palette, the user can configure how that question appears and behaves. The exact fields vary by question type, but the main configuration areas are consistent.

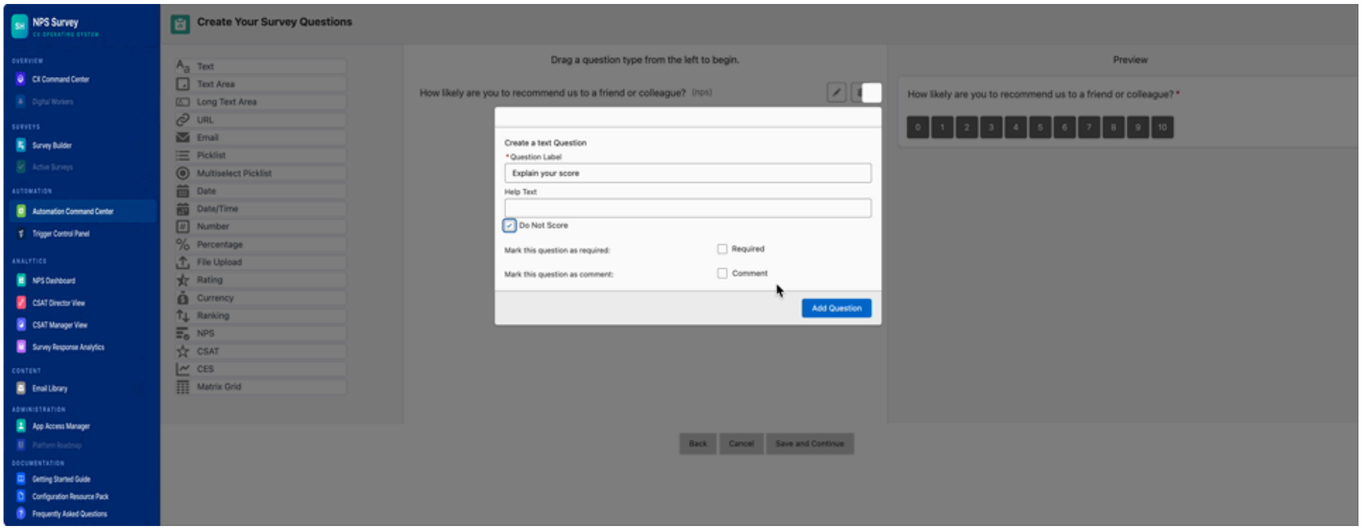

Figure 9. Example question configuration modal.

Configuration Area	Purpose
Question Label	The question text shown to the respondent.
Help Text	Optional guidance or context shown with the question.
Required	Determines whether a response must be provided before continuing or submitting.
Answer Options	Defines available choices for structured question types.
Comment / Additional Response	Where supported, allows explanatory feedback to accompany a structured answer.
Scoring	Where applicable, defines how responses contribute to scoring or reporting.
Live Preview	Shows how the question will appear to the respondent while it is being configured.

Customize Form

After questions are added, the Customize Form options refine how responses are stored, how the survey behaves, and how the respondent experience is presented.

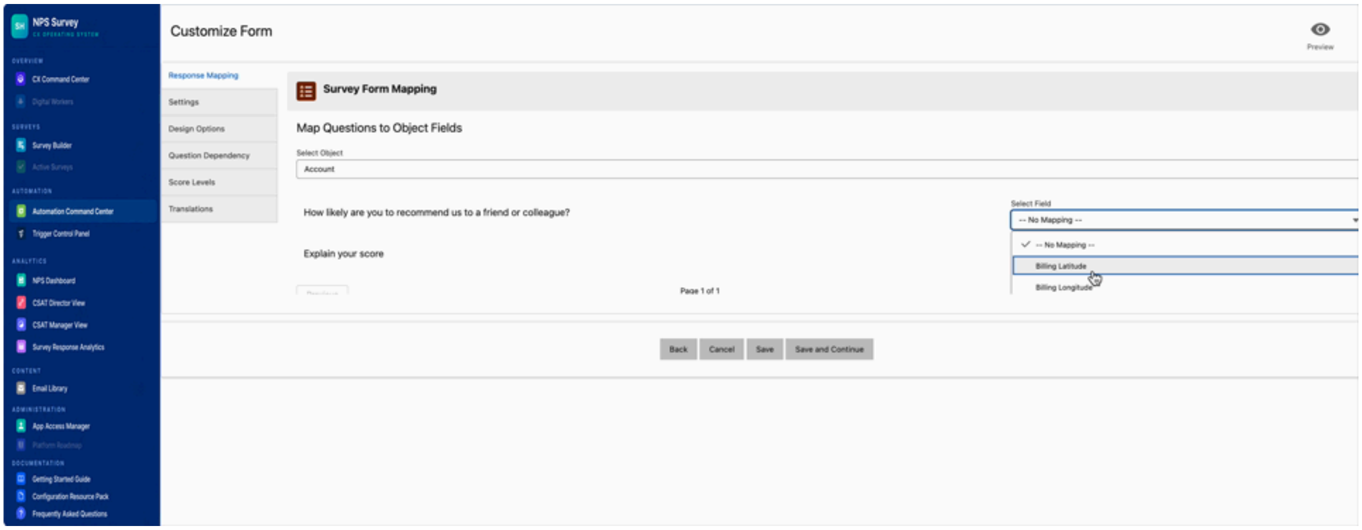

Figure 10. Customize Form options within the current Survey Builder experience.

Configuration Area	Purpose
Response Mapping	Connect survey responses to relevant Salesforce fields where structured writeback or reporting is required.
Settings	Control survey-level behavior such as response requirements, multiple responses, availability dates, response timing, and recurrence or frequency where available.
Design Options	Control visual presentation including colors, fonts, backgrounds, images, and page layout.
Question Dependency	Create conditional relationships between questions so follow-up questions can appear based on earlier responses.
Score Levels	Define how score ranges are grouped or interpreted for reporting and analysis.
Translations	Prepare survey content for respondents who require different languages.

Question dependency example If an NPS response is 6 or below, a follow-up question such as “What could we improve?” can be displayed to collect additional context.

Design & Branding

Design Options control the respondent-facing visual experience. The current Builder provides styling controls for survey text, colors, page presentation, and images. Branding should remain consistent with the intended survey experience and should be previewed before deployment.

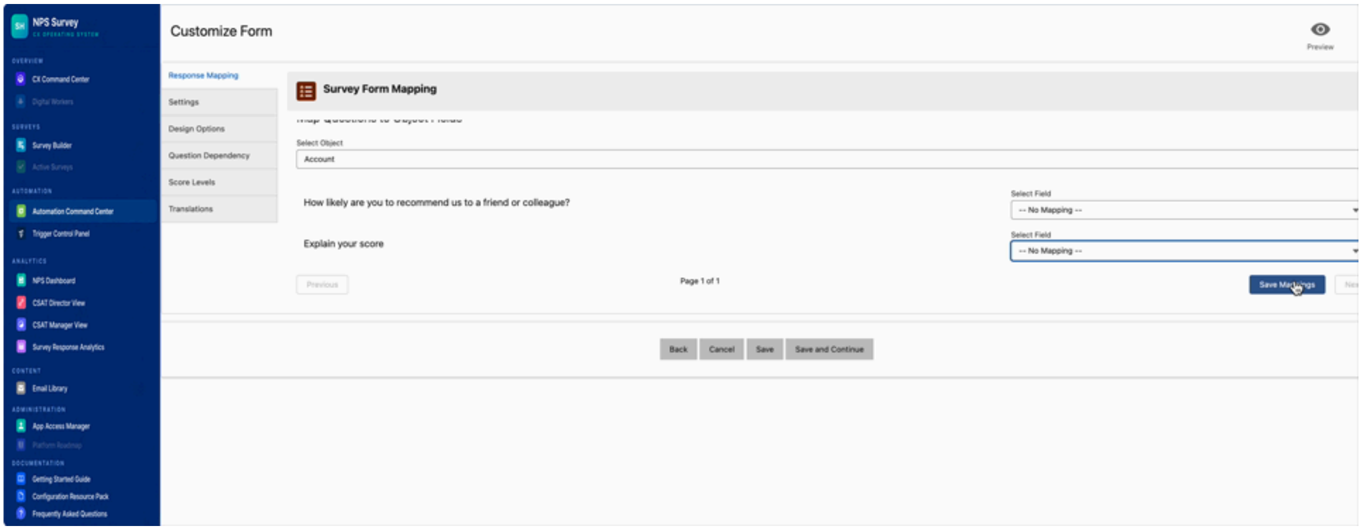

Figure 11. Design and branding controls in Customize Form.

- Title, question, and answer colors; fonts; and text sizing.
- Background and section styling.
- Questions per page and page presentation.
- Logo, background image, header image, and footer image where configured.
- Preview before applying and publishing design changes.

4.2.4 Thank You Page

The Thank You Page is the confirmation experience shown after a respondent completes the survey. Users can configure a heading and message and review the respondent-facing preview before deployment.

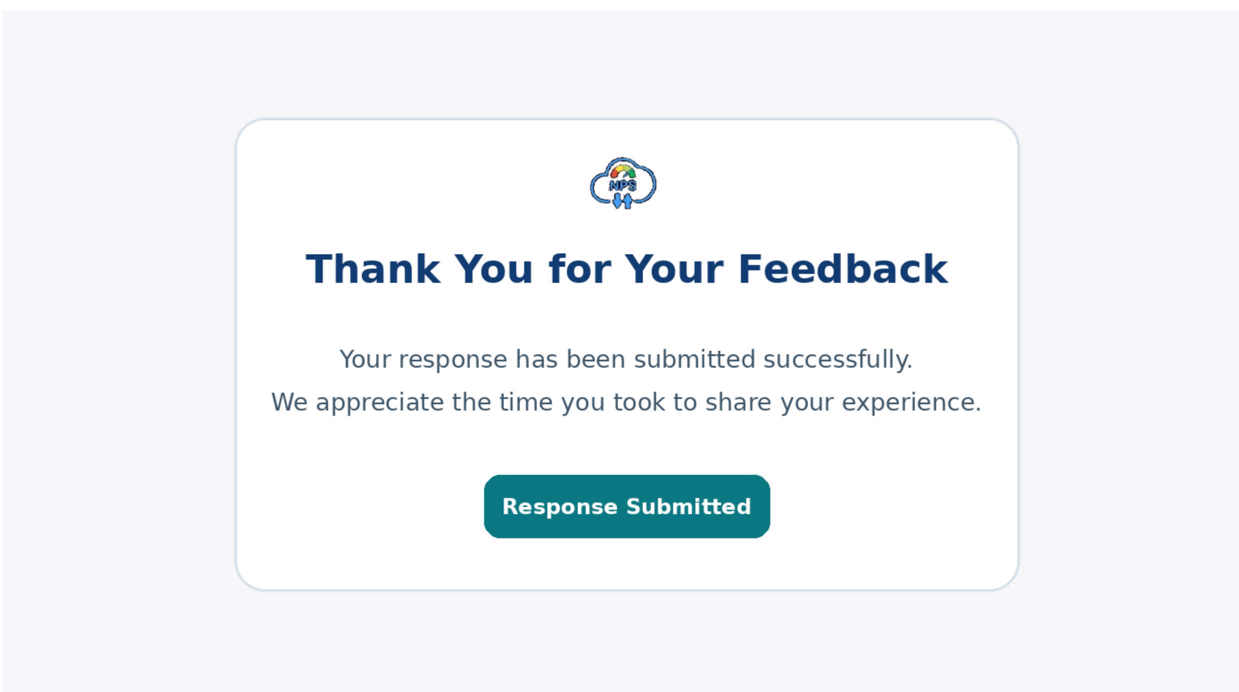

Figure 12. Generic example of a polished respondent confirmation page.

> **Recommended wording** Keep the confirmation brief, appreciative, and neutral. Avoid organization-specific examples in reusable documentation.

4.2.5 Deployment

Deployment is where a completed survey is prepared for respondents. The current experience supports distribution through Email and QR Code, with the survey link available where shown in the interface.

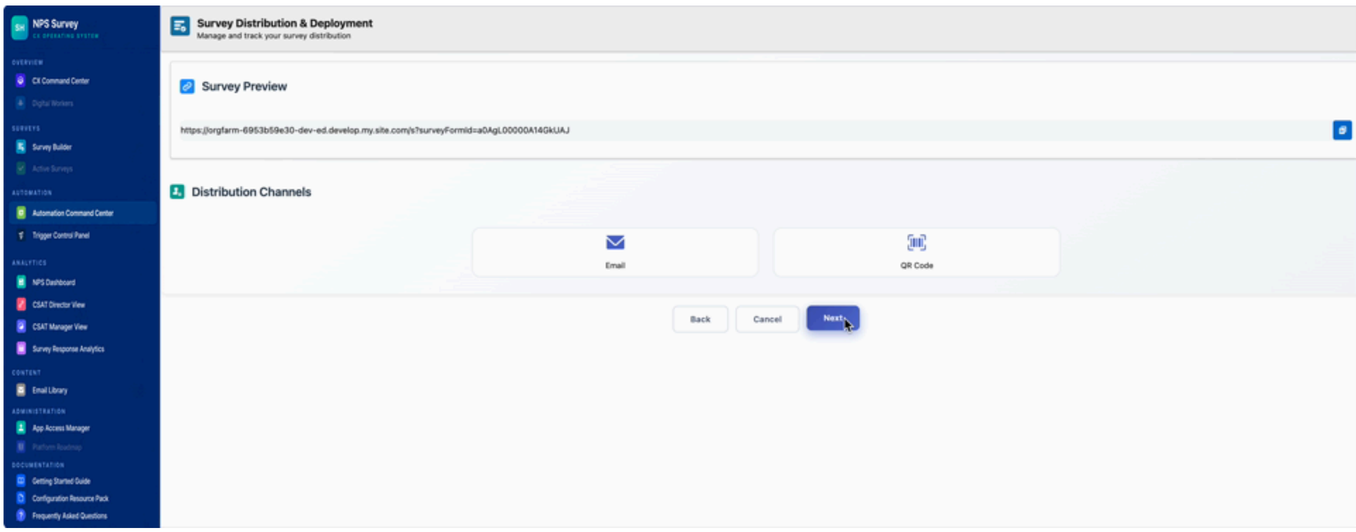

Figure 13. Deployment channel selection.

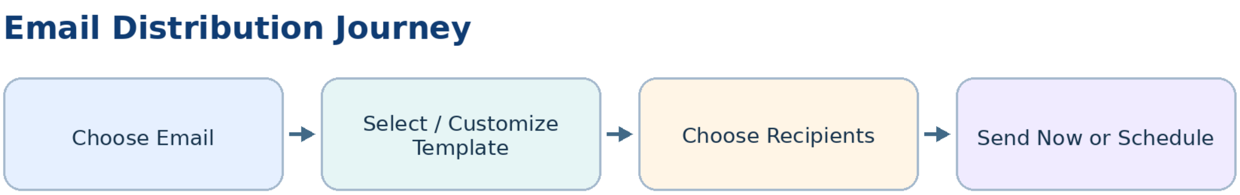

Figure 14. Email deployment is a guided sequence: template, recipients, and delivery timing.

For email distribution, the user selects or customizes the message, chooses the recipient population, and then selects the delivery timing.

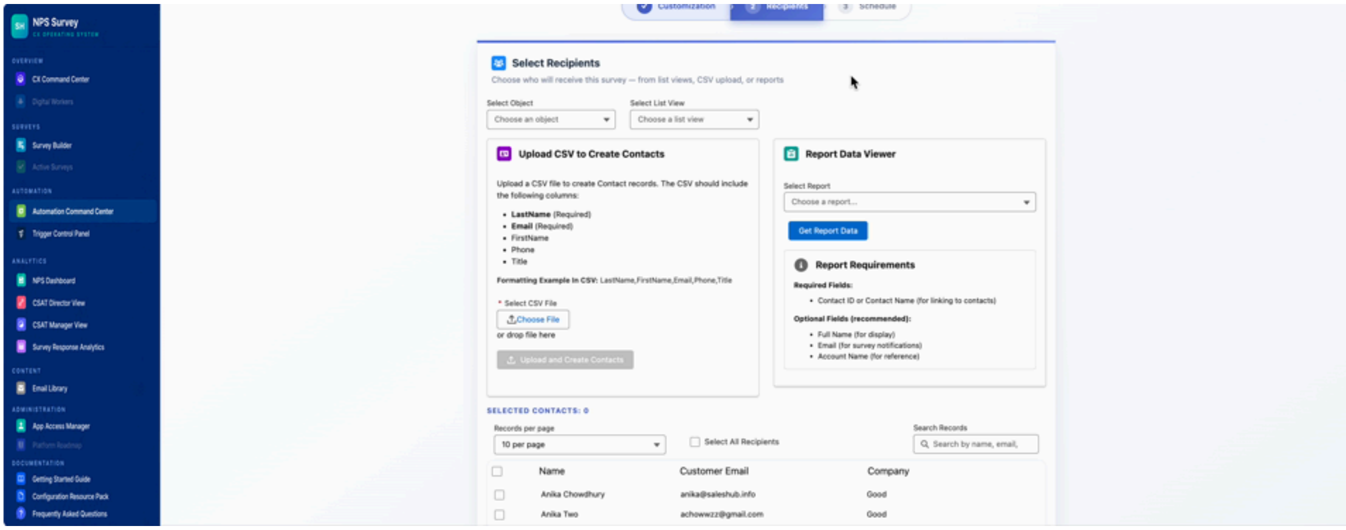

Figure 15. Email deployment configuration and recipient selection.

Delivery Option	When to use it
Send Now	Send the survey once the message and recipient selection are ready.
Schedule	Choose a future delivery date and time rather than sending immediately.

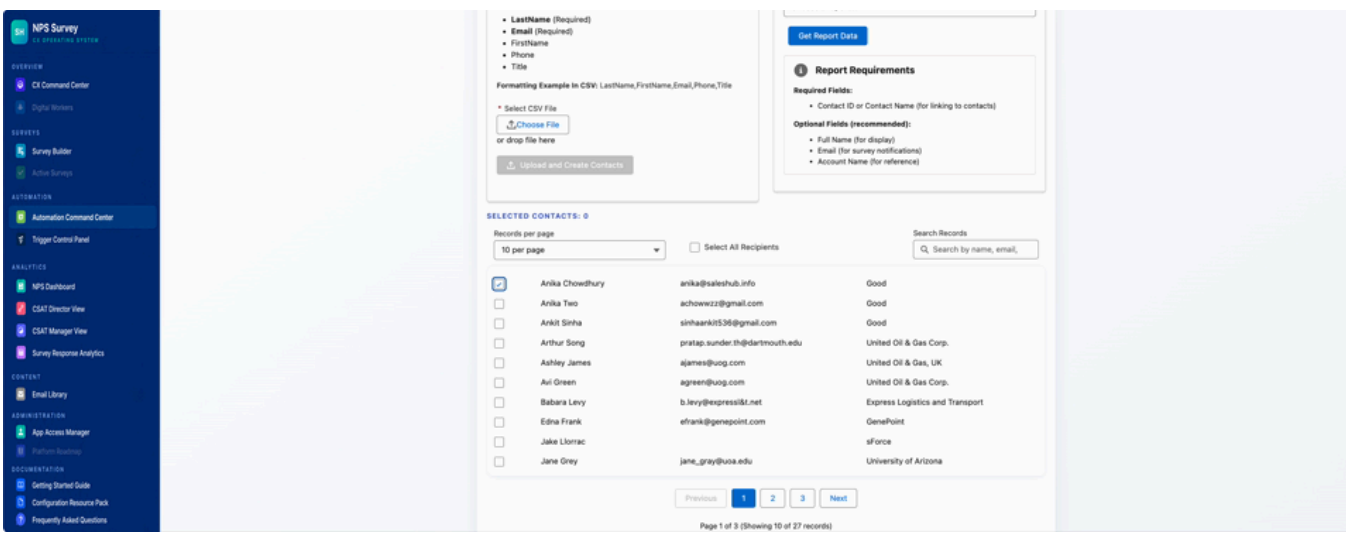

Figure 16. Scheduled email distribution controls.

Recipient selection can use available Salesforce records and audience sources shown in the current interface, including manual selection/search, report-based audiences, and CSV-created contacts where applicable.

4.2.6 Results

After deployment, the Results stage provides a survey-level view of available response information such as response counts, response rate, score summaries, visualizations, and recent responses. Deeper analysis is covered later in the Analytics section.

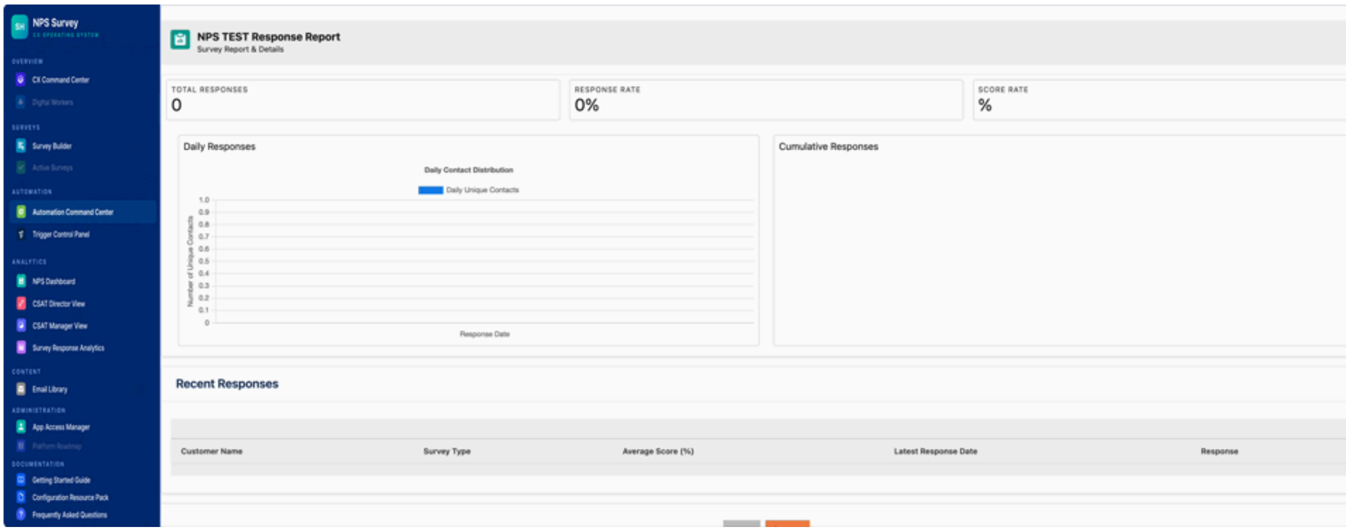

Figure 17. Results stage after survey deployment.

4.3 Work with an Existing Survey

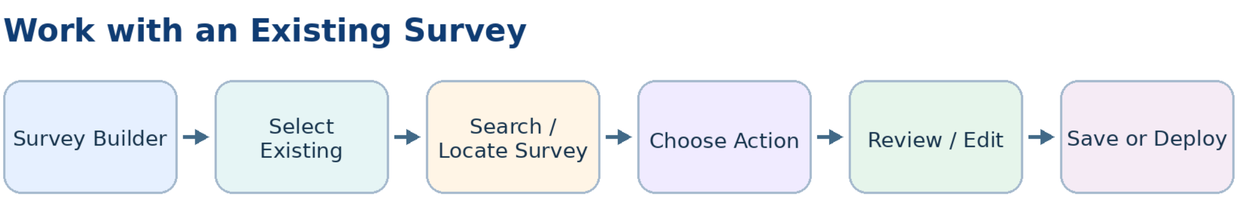

Figure 18. Existing survey workflow.

Selecting an existing survey opens the Survey Forms list, where users can locate a form and choose the available action before continuing through the Builder experience.

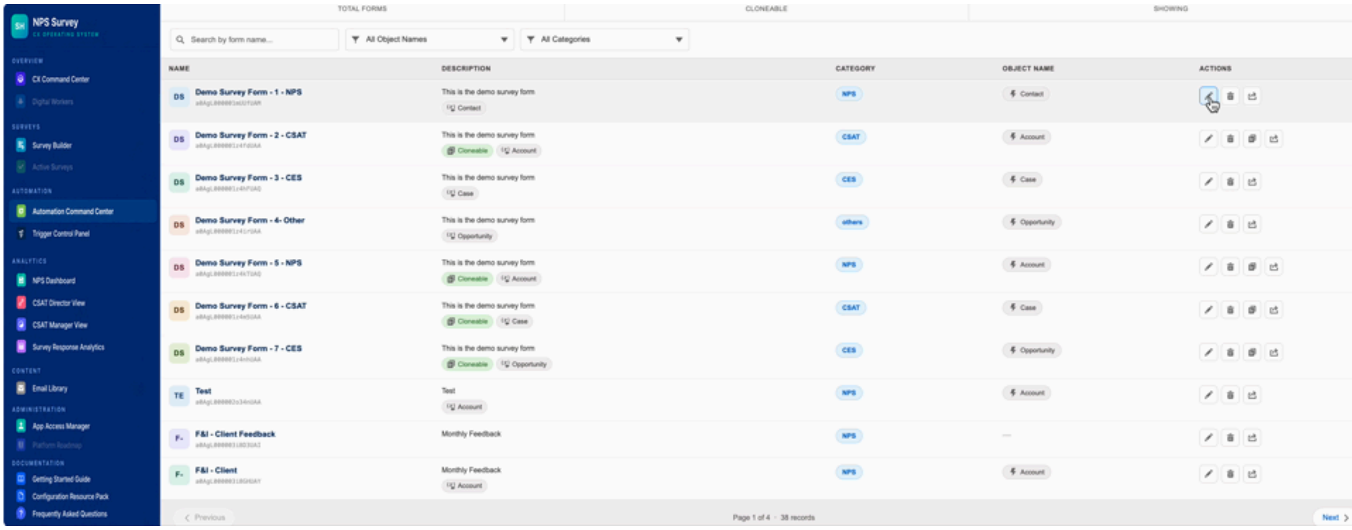

Figure 19. Survey Forms list for locating an existing survey.

Action	Purpose
Edit	Open the selected survey and update its configuration.
Clone	Create a copy where cloning is available.
Share	Use the available sharing option for the selected survey.
Delete	Remove a survey when deletion is appropriate and permitted.

Important Review the current use of a survey before changing or deleting it, particularly when it is already being distributed or has collected responses.

4.4 Static Surveys

Static Surveys are existing survey capabilities that currently follow a separate Salesforce configuration process. The current documentation covers Static CSAT and VOC survey forms.

Static Survey Configuration Flow

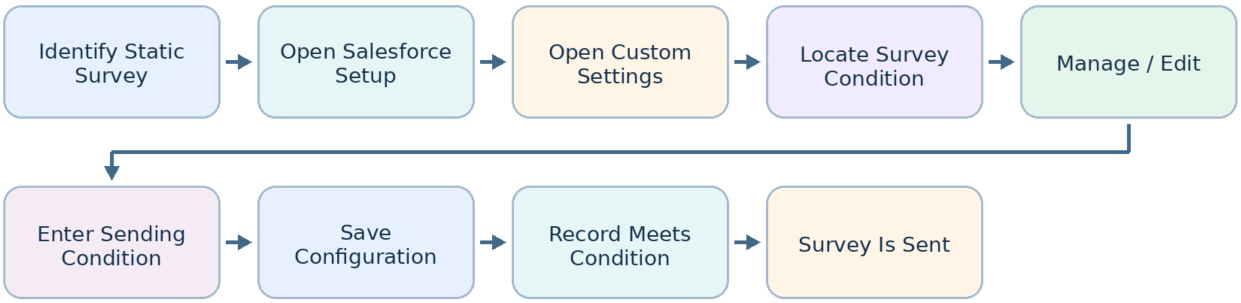

Figure 20. Current high-level Static Survey configuration flow.

Static Survey	Current configuration context
Static CSAT	Configured through Salesforce Custom Settings using a sending condition. A common example is sending when a Case reaches a closed status.
VOC	Configured through Salesforce Custom Settings and supports condition-based sending for Case, Contact, and Opportunity contexts.

The detailed administrator procedure - including Salesforce Setup, Custom Settings, field API names, and condition syntax - belongs in the Configuration Resource Pack. This Getting Started Guide focuses on the user journey and when the capability is appropriate.

> **Future navigation** Static survey functionality is expected to become easier to access through the Active Surveys area as that experience is released. The guide should be updated when the new workflow becomes available.

5. Automation & Triggering

5.1 Automation Command Center

The Automation Command Center provides a centralized workspace for creating and managing automated survey workflows. An automation can identify qualifying Salesforce records, send a selected survey, and manage reminder activity based on configured rules.

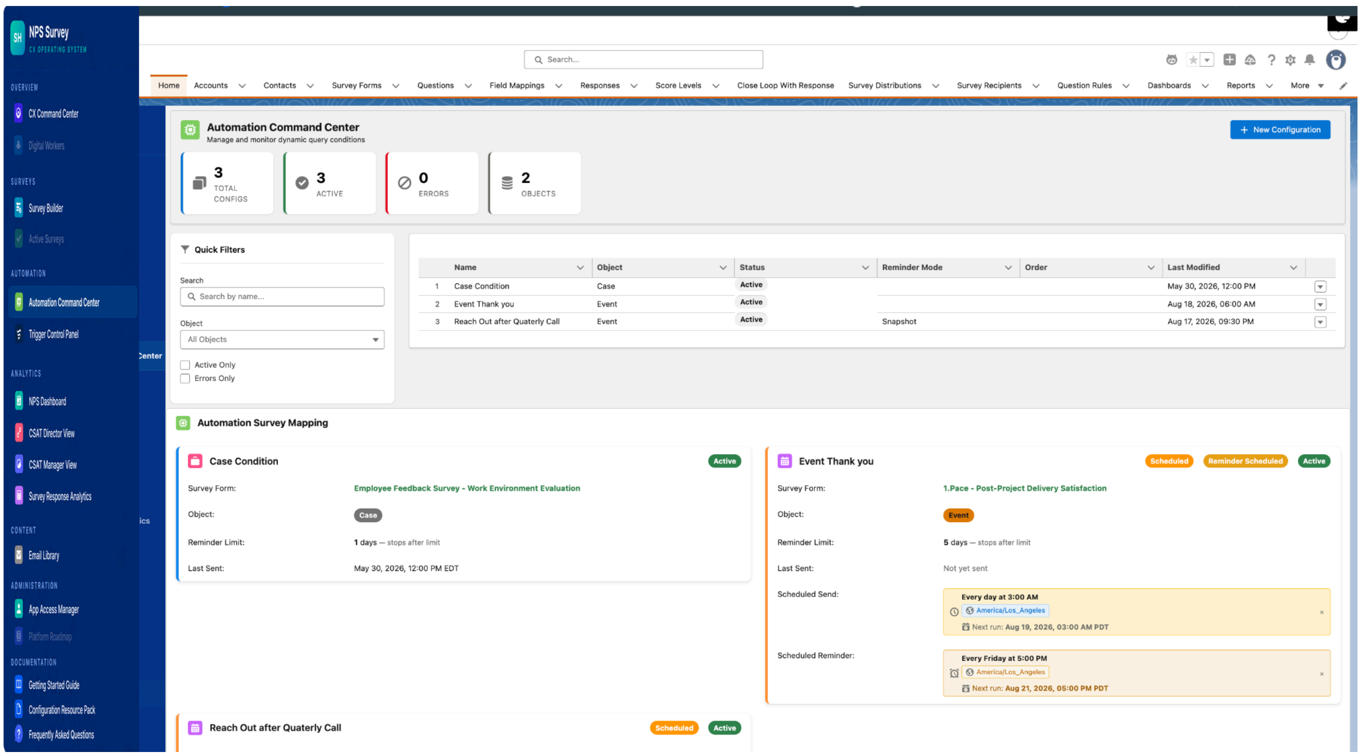

Figure 21. Automation Command Center landing screen with configurations and survey mappings.

The landing screen provides a summary of configurations, active/error status, object coverage, filters, and individual automation mappings. New configurations are created using the guided wizard.

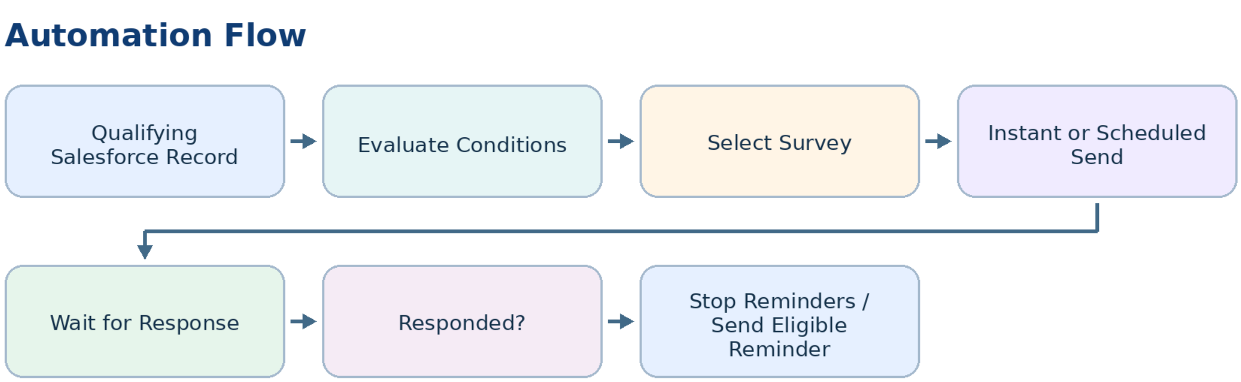

Figure 22. High-level automation flow.

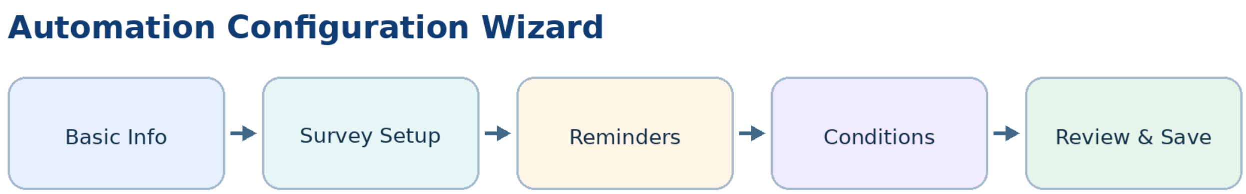

Figure 23. Five-step automation configuration wizard.

5.1.1 Basic Info

Basic Info names the automation, selects the Salesforce object it applies to, sets the execution order where available, and controls whether the configuration is active. A short description is recommended so the business purpose remains clear.

Setting	Guidance
Configuration Name	Use a clear name that describes the business event or purpose.
Object API Name	Select the supported object used by the automation, such as Case or Event in the current wizard.
Active	Keep enabled when the automation should run.
Description	Summarize the business purpose for administrators and reviewers.

5.1.2 Survey Setup

Survey Setup controls the initial survey delivery: which survey is sent, which email template is used, and whether the first survey is sent immediately or on a selected schedule.

Initial Send Option	Meaning
Instant Send	The initial survey is sent as soon as a qualifying record is identified.
Scheduled Send	The initial survey is sent on the configured schedule, allowing delivery at a specific time or cadence.

Important distinction The initial survey schedule and the reminder schedule are separate. Reminder behavior is configured in the next step.

5.1.3 Reminders

Reminder Setup controls follow-up emails for recipients who have not responded. The user can set a reminder limit, choose the reminder mode, select the reminder email template, and configure the recurring reminder schedule.

Setting	Business meaning
Reminder Limit	Maximum number of reminder emails a non-responder can receive for the survey.
Reminder Mode	Controls whether reminder-limit changes apply to existing eligible events or whether each event keeps the value captured when the survey was first sent.
Reminder Email Template	Template used for reminder messages.
Recurring Reminder Schedule	Determines when the reminder job checks for eligible non-responders.

The current automation guide distinguishes Live and Snapshot reminder modes. Detailed examples and edge cases will be documented in the Configuration Resource Pack.

5.1.4 Conditions

Conditions determine which Salesforce records qualify for the automation. Users build business logic from available fields, operators, and values, and can review the generated condition logic and matching records before saving.

> **Example** Event Subject = “Quarterly Review” can be used as part of the qualification logic for a survey that should be sent after a recurring customer review event.

5.1.5 Review & Save

The Review step brings the configuration together before activation. Users confirm the survey setup, send timing, reminder settings, and condition logic, then save the configuration.

5.2 Trigger Control Panel

The Trigger Control Panel is used to review and control application triggers that support automated survey behavior. It provides a consolidated view of trigger name, object, Salesforce status, application status, and enable/disable controls.

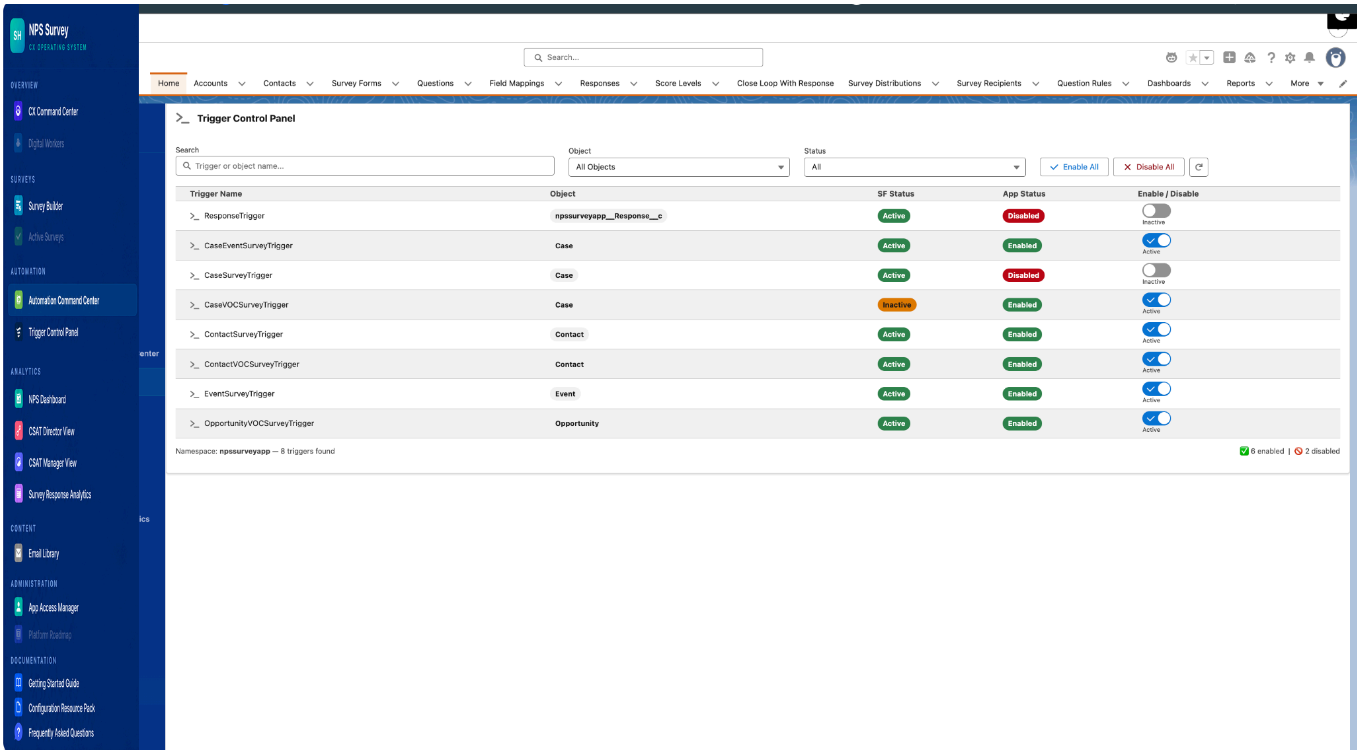

Figure 24. Trigger Control Panel.

How Trigger Control and Automation Work Together

Figure 25. Relationship between trigger control, automation rules, and survey delivery.

> **Use with care** Changes to trigger status can affect automated survey processing. Trigger settings should be reviewed carefully before they are enabled or disabled.

6. Analytics

This version of the Getting Started Guide focuses on the NPS Dashboard and Survey Response Analytics. The CSAT Director and Manager views remain available in the navigation, but detailed guidance will be added after the redesigned CSAT experience is released.

6.1 NPS Dashboard

The NPS Dashboard provides a consolidated view of Net Promoter Score performance, response activity, customer sentiment, and follow-up information.

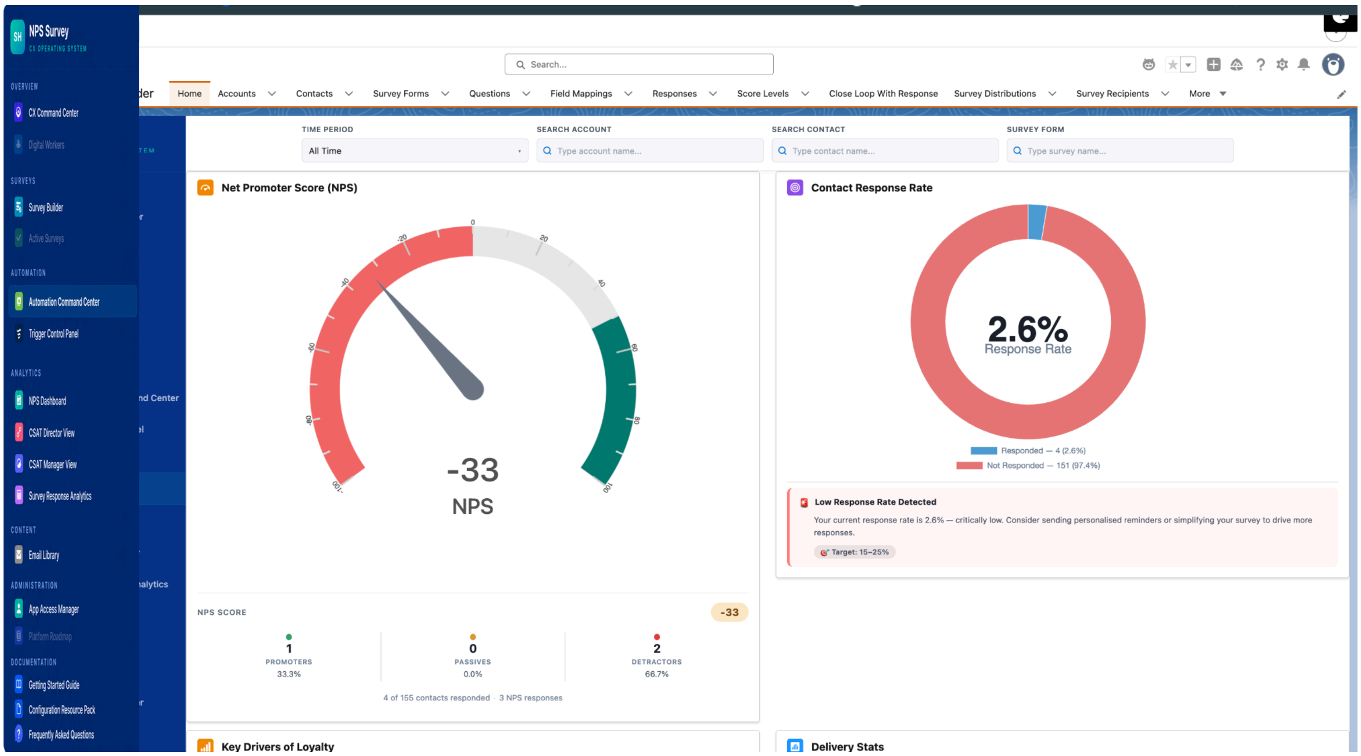

Figure 26. NPS Dashboard: filters, NPS score, and contact response rate.

6.1.1 Filters and Core NPS View

- Time Period - define the reporting window shown in the dashboard.
- Account - narrow the dashboard to a specific customer account where needed.
- Contact - focus on an individual contact where relevant.
- Survey Form - narrow the analysis to a particular NPS survey.

The primary NPS view shows the overall NPS value together with Promoter, Passive, and Detractor counts/percentages for the selected filters.

6.1.2 Contact Response Rate

The Contact Response Rate area shows the proportion of surveyed contacts who have responded. The current dashboard can also display a low-response notification so users can recognize when additional outreach may be appropriate.

6.1.3 Drivers, Delivery, and Summary Views

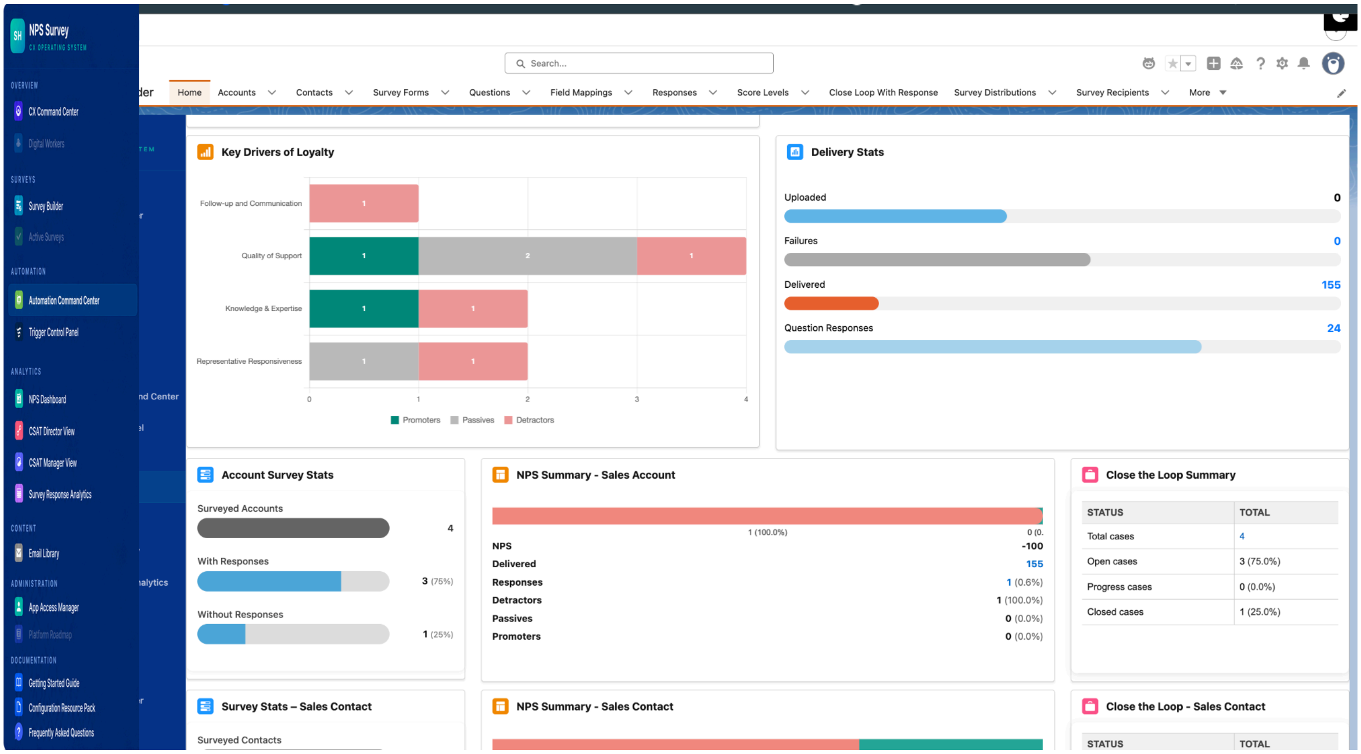

Figure 27. NPS Dashboard: key drivers, delivery stats, account/contact summaries, and close-the-loop status.

- Key Drivers of Loyalty - summarizes important experience dimensions across Promoter, Passive, and Detractor feedback.
- Delivery Stats - provides visibility into distribution and response activity.
- Account and Contact summaries - show survey activity and NPS results at customer relationship and individual-contact levels.
- Close-the-Loop summaries - show follow-up case status associated with survey feedback.

6.1.4 Transactional NPS Comments

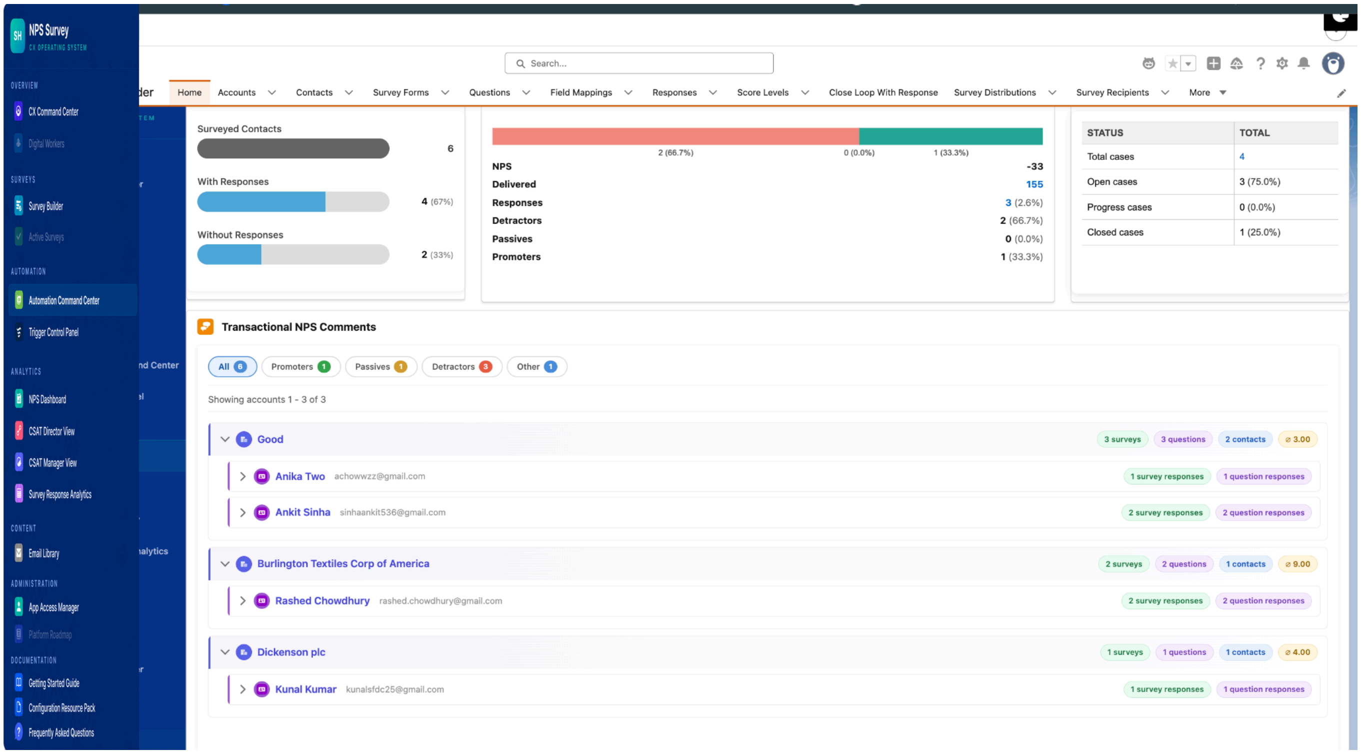

Figure 28. Transactional NPS Comments with expandable account and contact detail.

Transactional NPS Comments allow users to review feedback by sentiment category such as All, Promoters, Passives, Detractors, and Other. Accounts can be expanded to review associated contacts and response activity.

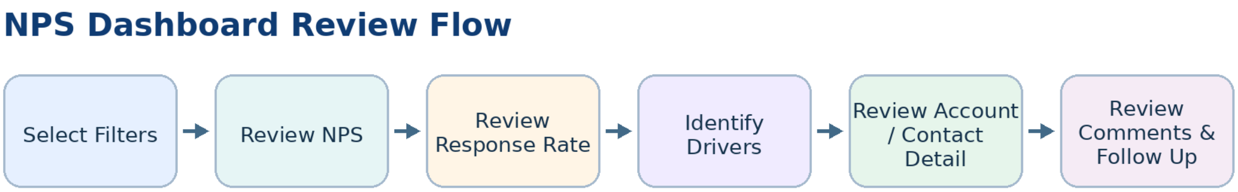

Figure 29. Recommended NPS Dashboard review flow.

6.2 Survey Response Analytics

Survey Response Analytics is designed for more detailed exploration of collected responses. It allows users to define the response population they want to analyze and then review the same data from several business dimensions.

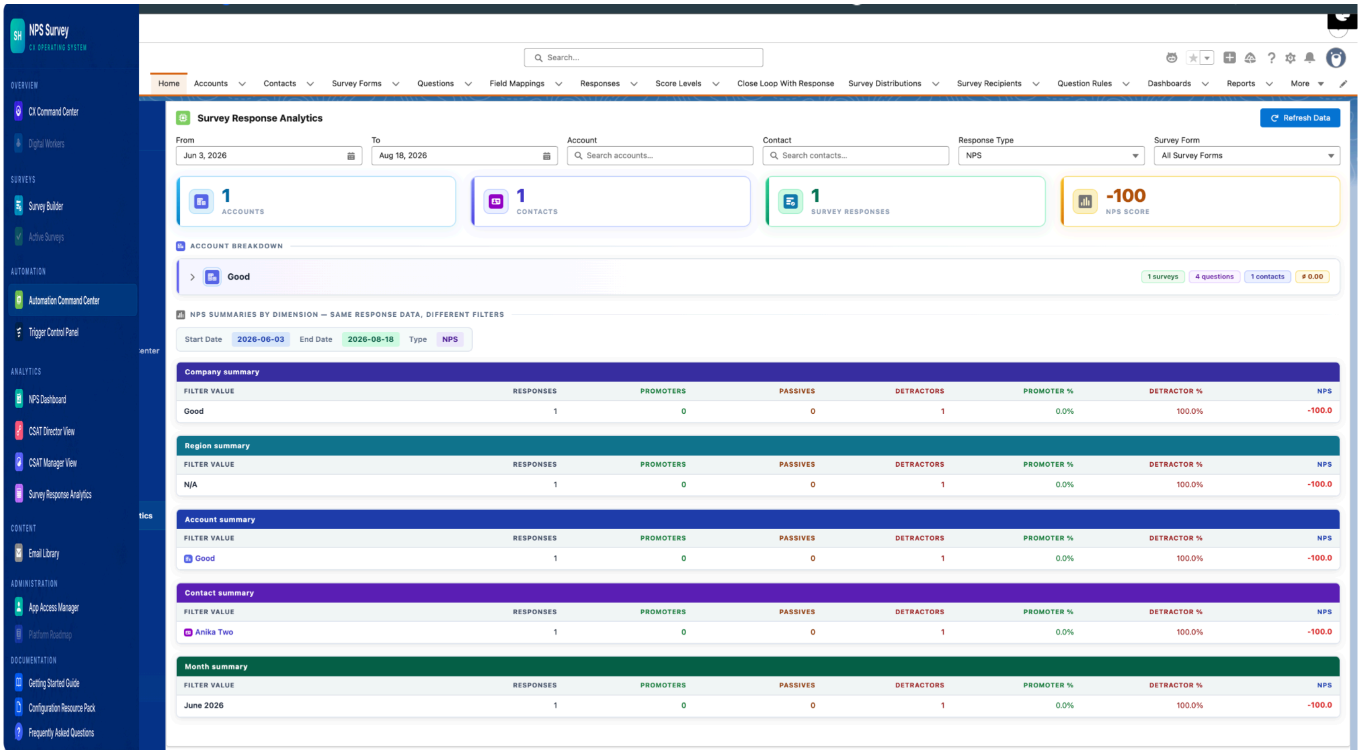

Figure 30. Survey Response Analytics with filters, summary cards, account breakdown, and dimension summaries.

6.2.1 Filters

Filter	Purpose
From / To	Choose the date range for the response set.
Account	Narrow the analysis to a specific account.
Contact	Narrow the analysis to a specific contact.
Response Type	Choose the response/scoring type to analyze.
Survey Form	Focus on a specific survey form.
Refresh Data	Apply the selected context and refresh the analytics view.

6.2.2 Summary Metrics and Drill-Down

Summary cards provide an immediate overview of the selected response population, including Accounts, Contacts, Survey Responses, and NPS Score when NPS responses are being analyzed.

The Account Breakdown provides an expandable view of accounts represented in the selected responses, allowing the user to move from the summary population toward more detailed customer and response context.

6.2.3 Dimension Summaries

The same filtered response population can be summarized from different perspectives. The current NPS view includes Company, Region, Account, Contact, and Month summaries with measures such as Responses, Promoters, Passives, Detractors, Promoter %, Detractor %, and NPS.

> **Flexible date analysis** The From and To controls allow users to analyze any relevant date range such as a month, campaign period, or custom business window. This guide does not imply a dedicated quarterly comparison interface.

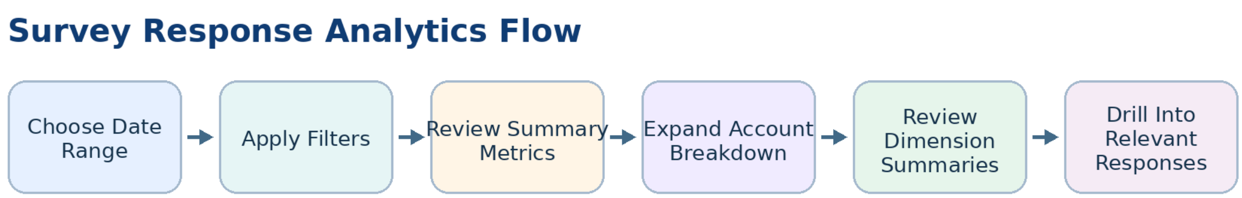

Figure 31. Recommended Survey Response Analytics flow.

7. Email Library

The Email Library provides a centralized view of Salesforce email templates that can be used with survey communications. It helps users find templates, review readiness and usage status, edit content, and connect an appropriate template to a survey.

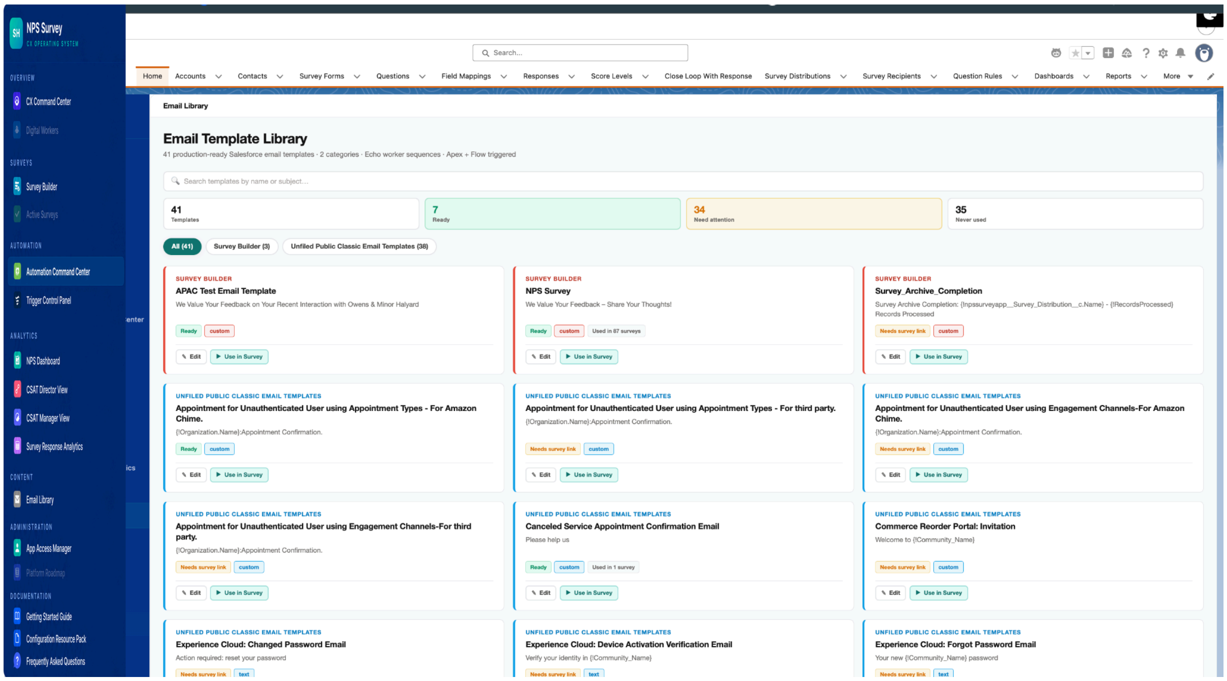

Figure 32. Email Template Library.

Area	What it helps users do
Search	Find a template by name or subject.
Summary counters	Review total templates and current readiness/usage states such as Ready, Needs Attention, and Never Used.
Template categories	Filter between all templates, Survey Builder templates, and the available classic template category.
Edit	Open the selected template for content or configuration changes.
Use in Survey	Connect an appropriate template to a survey workflow.

Template cards also surface context such as whether a template needs a survey link, the template type, and whether it is already used by one or more surveys. Users should review these indicators before selecting a template for deployment or automation.

8. App Access Manager

The App Access Manager provides a centralized workspace for managing application access and reviewing permission and license information across NPS Survey CX OS.

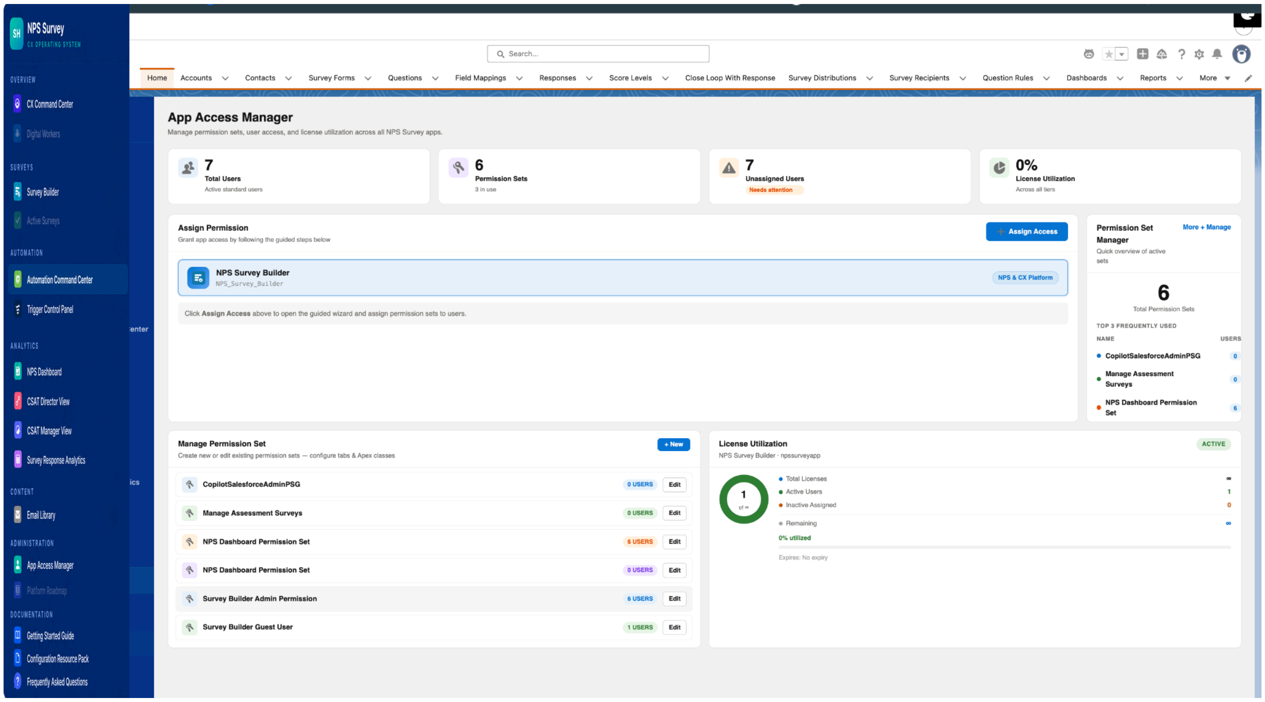

Figure 33. App Access Manager.

Area	Purpose
Total Users	Shows the number of active standard users represented in the access view.
Permission Sets	Shows available permission sets and current assignment context.
Unassigned Users	Highlights users who may still require access configuration.
License Utilization	Shows available package license usage information.
Assign Access	Opens the guided access assignment process.
Manage Permission Set	Allows administrators to review or maintain permission-set assignments and app/tab access.

For detailed access and permission troubleshooting, refer to the Frequently Asked Questions document and the Configuration Resource Pack.

9. First End-to-End Survey Journey

The following quick-start sequence brings the main platform areas together in one practical workflow. It can be used during onboarding or as a simple go-live readiness check.

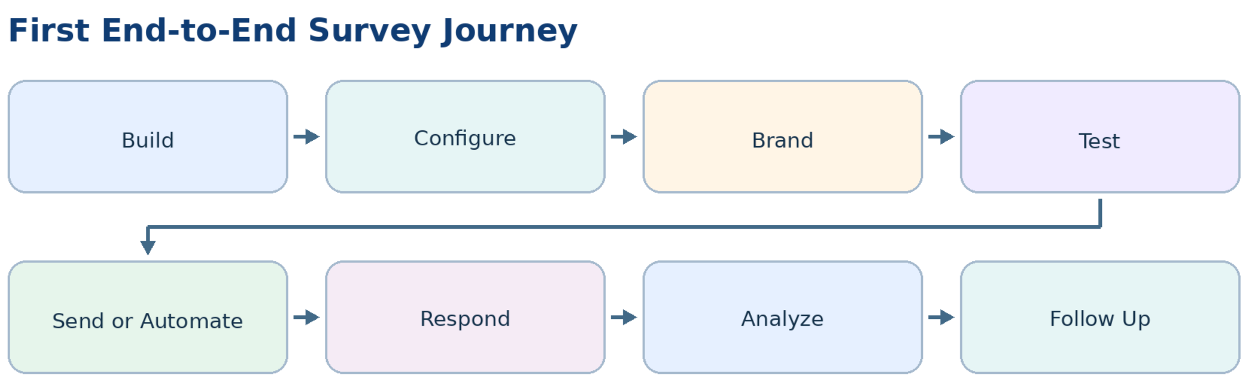

Figure 34. First end-to-end survey journey.

Step	What to confirm
1. Build	Survey name, description, type, and intended business purpose are clear.
2. Configure	The correct Salesforce object/context and response settings are selected.
3. Brand	Questions, logic, design options, and Thank You Page are reviewed in preview.
4. Test	A test response is submitted and expected behavior is confirmed.
5. Send or Automate	Recipient selection, email template, send timing, and any automation conditions are validated.
6. Respond	The survey can be opened and submitted successfully from the respondent experience.
7. Analyze	The response appears in the appropriate result/analytics experience.
8. Follow Up	Any required follow-up or close-the-loop action is assigned and tracked.

Go-live principle Complete one realistic end-to-end test before production use.

Appendix A - Matrix Grid Questions

A Matrix Grid presents several related rows against a shared set of answer columns. It is useful when respondents need to evaluate multiple items using the same scale, select multiple attributes, rank items, or allocate choices across rows and columns.

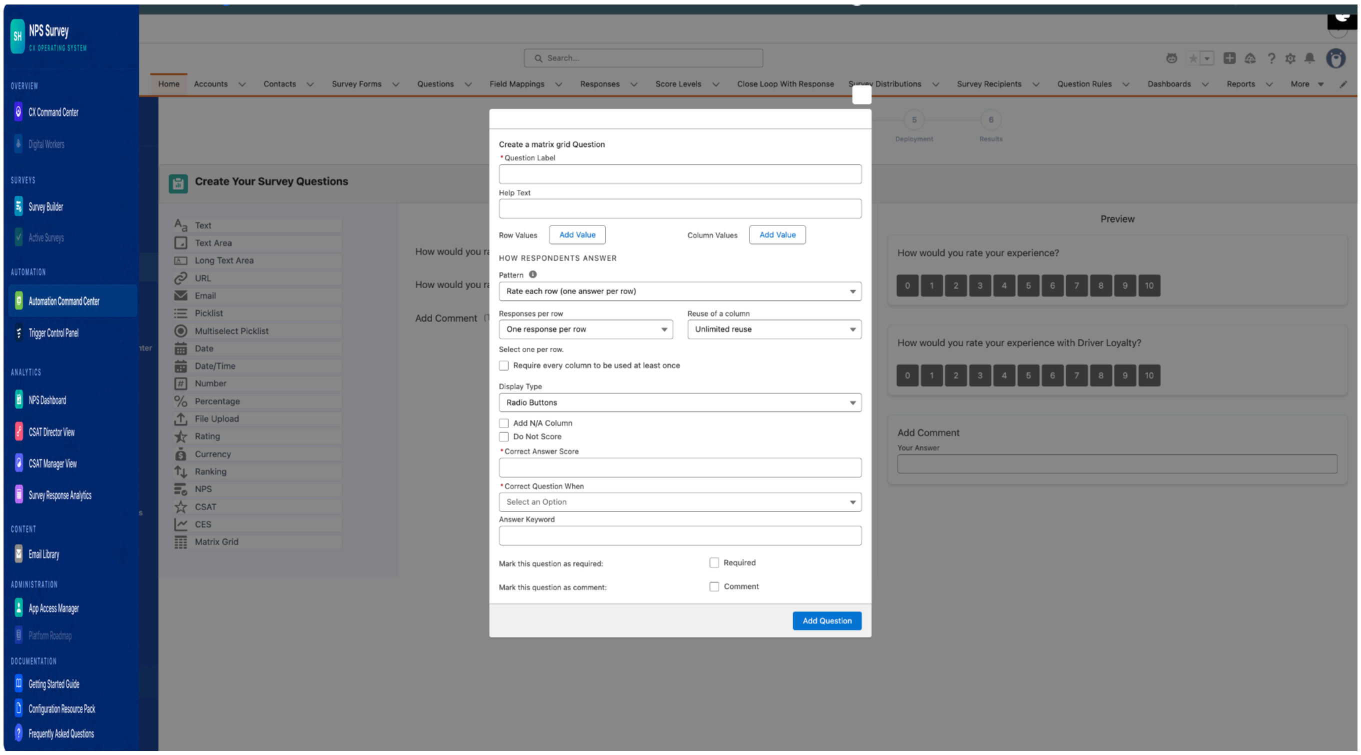

Figure A1. Current Matrix Grid configuration modal.

A.1 Core Configuration

Configuration	Purpose
Question Label	Main instruction shown above the matrix.
Help Text	Optional guidance for respondents.
Row Values	Items being evaluated.
Column Values	Answer choices shown across the grid.
Pattern	Ready-made answering behavior that combines row-response and column-reuse rules.
Responses per Row	Controls whether a row allows one, multiple, or up to N selections.
Reuse of a Column	Controls whether a column may be reused without limit, once, or up to N times.

Configuration	Purpose
Require every column to be used	Optional coverage check for allocation/ranking-style grids.
Display Type	Radio Buttons, Checkboxes, or Selectable Cells.
N/A Column	Adds a Not Applicable choice where the respondent may legitimately be unable to answer a row.
Required	Controls whether the visible rows must be answered before submission.
Scoring / Correct-answer options	Where enabled, supports scored or rule-based matrix use cases.

A.2 Ready-Made Patterns

Pattern	Answers per row	Column reuse	Typical use
Rate each row	Exactly one	Allowed	Rate several services using the same satisfaction scale.
Select all that apply in each row	Multiple	Allowed	Associate multiple attributes with each item.
Rank rows	Exactly one	Not allowed	Assign unique priorities with no ties.
Assign each column to one row	Multiple	Not allowed	Allocate each column item to one row/owner while allowing a row to receive several assignments.

A.3 Custom Response Rules

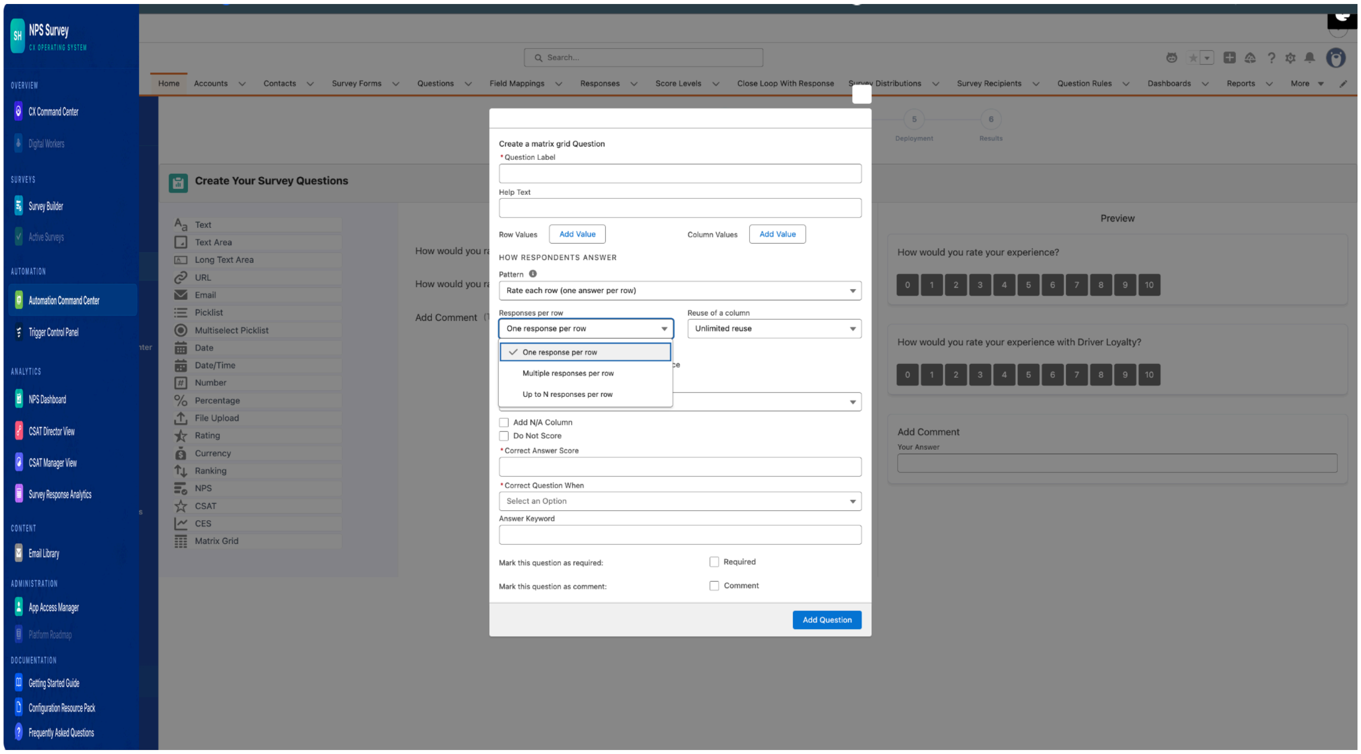

Figure A2. Responses-per-row choices in the current Matrix Grid configuration.

Responses per Row	Behavior
One response per row	The respondent can keep one selected column in each row.
Multiple responses per row	The respondent can select multiple columns within a row.
Up to N responses per row	The respondent can make multiple selections up to the configured limit.

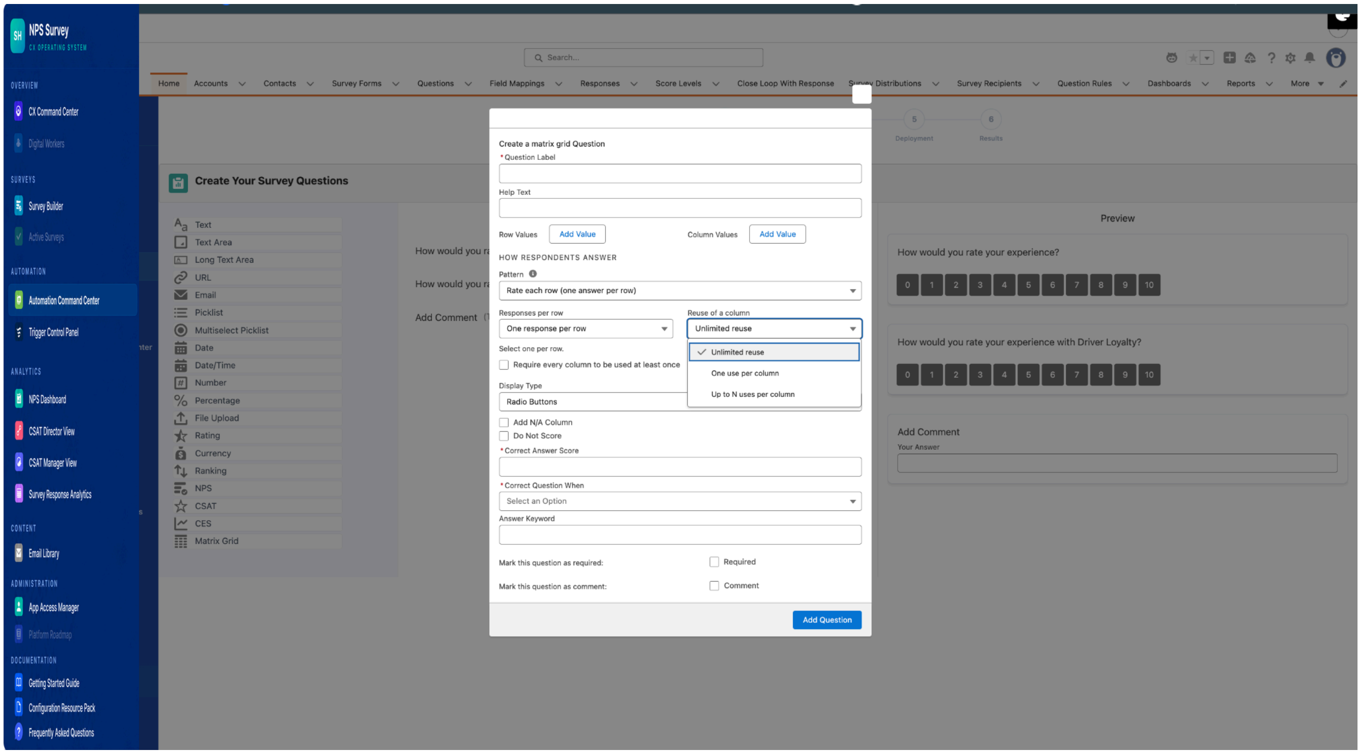

Figure A3. Column-reuse choices in the current Matrix Grid configuration.

Reuse of a Column	Behavior
Unlimited reuse	Any number of rows may use the same column.
One use per column	A selected column cannot be reused by another row.
Up to N uses per column	A column can be reused only up to the configured limit.

A.4 Display Types

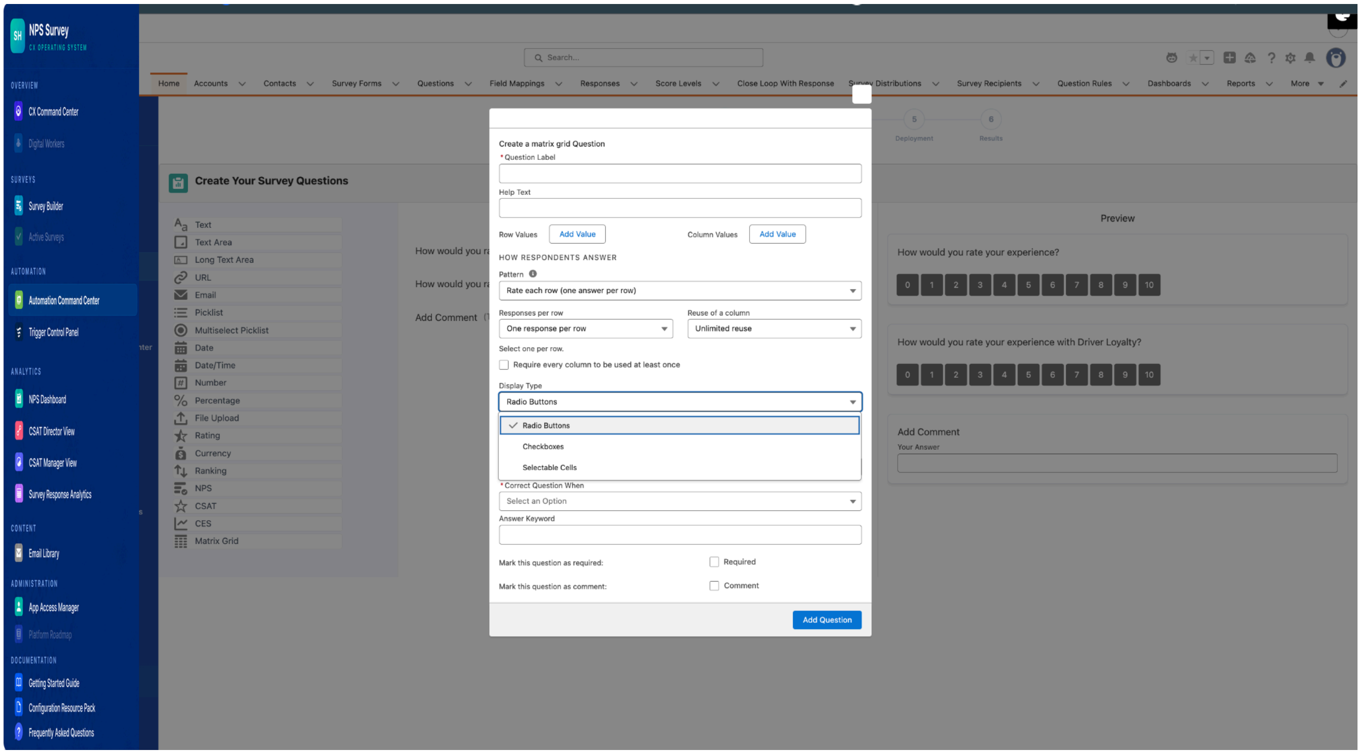

Figure A4. Matrix Grid display types: Radio Buttons, Checkboxes, and Selectable Cells.

Display Type	Best fit
Radio Buttons	One response per row where the interface should clearly signal a single choice.
Checkboxes	Multiple-response rows where more than one answer can apply.
Selectable Cells	Flexible grid interactions, including single, multiple, or unique-column rules; also provides a larger clickable area.

A.5 N/A, Required Behavior, and Validation

- Use an N/A column when a row may genuinely not apply to some respondents. N/A should remain exclusive within its row.
- When a Matrix question is Required, each required visible row must be completed before submission.
- The rule summary should be clear to respondents before they make selections, especially when column reuse or up-to-N limits apply.
- Unavailable selections should be explained rather than simply hidden so respondents understand the active rule.
- Avoid impossible combinations, such as requiring more unique column assignments than the available columns can support.

A.6 Design Guidance

- Use a rating matrix when the same scale applies naturally to every row.
- Use multi-select matrix behavior only when several answers can legitimately apply to a row.
- Use unique-column behavior for ranking or allocation, not when ties are acceptable.
- Keep row and column labels concise and easy to scan. Very large grids can reduce readability, especially on mobile devices.
- Match the display type to the response rule: Radio Buttons for single-choice behavior, Checkboxes for multi-select behavior, and Selectable Cells when larger tap targets or flexible selection behavior are useful.

For additional Matrix troubleshooting and common questions, refer to the separate Frequently Asked Questions document.

Appendix B - Sample Surveys with Business Scenarios

The following examples begin with a realistic business scenario and then show how a survey can be designed around that need. The examples are intentionally generic so they can be adapted across industries and customer environments.

Across the examples, the question sets collectively demonstrate the question types currently available in Survey Builder. Each individual survey remains focused on the business scenario rather than adding question types solely for demonstration.

B.1 Quarterly Customer Relationship Review

Business Scenario An account management team meets with key customers every quarter. After each review, the team wants to understand relationship health, identify concerns early, and capture priorities for the next interaction.

Item	Recommended approach
Purpose	Capture consistent relationship feedback after each quarterly review while preserving each submitted response separately over time.
Recommended Survey	Quarterly Customer Relationship Survey
Survey Type	NPS
Salesforce Context	Account, with the related Event providing interaction context
Recommended Timing	Send shortly after each quarterly customer review, ideally the same day or within 24 hours.

#	Question	Type	Required / Behavior
1	How likely are you to recommend our organization to a colleague or peer?	NPS	Required
2	What is the main reason for your score?	Long Text Area	Required
3	How satisfied are you with the overall value you received during this quarter?	Rating	Required
4	Which area had the greatest influence on your experience this quarter?	Picklist	Required

#	Question	Type	Required / Behavior
5	Which areas should receive greater attention before our next review?	Multiselect Picklist	Optional
6	What is the most important improvement we could make before the next review?	Text Area	Optional

Question Dependency / Branching If NPS is 6 or below, display an additional Long Text Area asking what would most improve the relationship.

Suggested Distribution Use Automation Command Center after the qualifying quarterly Event. Reminders can be configured for non-responders when appropriate.

Why this survey design works: It combines a relationship-level measure with score context, experience drivers, priority areas, and one actionable improvement without changing the core questions each quarter.

B.2 Support Case Resolution

Business Scenario A customer support case has been resolved. The service team wants to know whether the customer was satisfied, how much effort was required, and whether any follow-up is still needed.

Item	Recommended approach
Purpose	Measure both satisfaction and effort after case resolution and collect enough context to support service recovery when necessary.
Recommended Survey	Case Resolution Experience Survey
Survey Type	CSAT / CES
Salesforce Context	Case
Recommended Timing	Send shortly after the Case is closed and the customer has received the resolution.

#	Question	Type	Required / Behavior
1	How satisfied are you with the resolution of this case?	CSAT	Required

#	Question	Type	Required / Behavior
2	How easy was it to get your issue resolved?	CES	Required
3	Was your issue fully resolved?	Picklist	Required
4	How would you rate the clarity of communication during the case?	Rating	Required
5	If the issue is still unresolved, upload any supporting screenshot or document.	File Upload	Conditional
6	What could we have done better?	Long Text Area	Conditional / Optional

Question Dependency / Branching If "Fully resolved" is No or Partially, display the File Upload and improvement questions. A low CSAT result can also display the improvement question.

Suggested Distribution Use an automated Case-based workflow or the available Static CSAT configuration, depending on the desired administration model.

Why this survey design works: It measures the outcome, the effort required, and the communication experience while showing additional questions only when more context is needed.

B.3 Training or Implementation Session Feedback

Business Scenario A customer has completed a training, onboarding, implementation, or enablement session. The delivery team wants feedback on the session and guidance for future content.

Item	Recommended approach
Purpose	Measure session satisfaction, clarity, topic usefulness, and future learning needs.
Recommended Survey	Training & Implementation Feedback
Survey Type	CSAT
Salesforce Context	Contact / Event
Recommended Timing	Send immediately after the session or later the same day while the experience is fresh.

#	Question	Type	Required / Behavior
1	Overall, how satisfied were you with the session?	CSAT	Required
2	How would you rate the clarity of the material presented?	Rating	Required
3	Which topics were most useful to you?	Multiselect Picklist	Optional
4	How was the pace of the session?	Picklist	Required
5	What topic should be added or expanded in a future session?	Long Text Area	Optional
6	What email address should we use if you would like follow-up resources?	Email	Optional

Question Dependency / Branching If CSAT is low, display an additional Text Area asking what would have improved the session.

Suggested Distribution Send from the Survey Builder after the session or use an Event-based automation when the session record meets the configured conditions.

Why this survey design works: It keeps the core feedback brief while collecting both structured ratings and practical ideas for future enablement.

B.4 Product Experience & Feature Evaluation

Business Scenario A product team wants to understand how customers experience several parts of the product using the same satisfaction scale, then learn which capabilities should be prioritized next.

Item	Recommended approach
Purpose	Collect consistent item-level product feedback and identify the relative priority of future enhancements.
Recommended Survey	Product Experience Review
Survey Type	Custom / CSAT-oriented
Salesforce Context	Account or Contact

Item	Recommended approach
Recommended Timing	Send after a meaningful product-use period, release milestone, or structured product review.

#	Question	Type	Required / Behavior
1	How satisfied are you with each of the following product areas? Rows: Ease of use, Reliability, Reporting, Integrations, Support. Columns: Very dissatisfied to Very satisfied.	Matrix Grid	Radio Buttons; one response per row; unlimited column reuse
2	Rank the following enhancement areas from highest to lowest priority: Reporting, Integrations, Mobile, Alerts, Administration.	Ranking	Required
3	Which product area has the greatest impact on your daily work?	Picklist	Required
4	What change would create the most value for your team?	Long Text Area	Optional

Question Dependency / Branching If a Matrix row is rated negatively, show an optional question asking for additional detail.

Suggested Distribution Send after a planned product review or customer success checkpoint using the appropriate current distribution method.

Why this survey design works: The Matrix Grid captures comparable product ratings while Ranking identifies which improvements matter most.

B.5 Renewal Readiness Review

Business Scenario A customer is approaching a renewal decision. The account team wants to understand advocacy, adoption, budget context, and any concern that should be addressed before the renewal discussion.

Item	Recommended approach
Purpose	Identify relationship risk and readiness before the renewal decision.

Item	Recommended approach
Recommended Survey	Renewal Readiness Survey
Survey Type	NPS
Salesforce Context	Opportunity
Recommended Timing	Send during the renewal planning window, before the final renewal decision.

#	Question	Type	Required / Behavior
1	How likely are you to recommend continuing with our solution?	NPS	Required
2	Approximately what percentage of your team actively uses the solution?	Percentage	Optional
3	If additional budget is planned for expansion, what approximate amount has been allocated?	Currency	Optional
4	What is the biggest factor in your renewal decision?	Picklist	Required
5	What concern should our team address before renewal?	Long Text Area	Optional

Question Dependency / Branching If NPS is 6 or below or adoption is below the organization's desired threshold, display the concern question prominently for completion.

Suggested Distribution Send manually to the renewal stakeholders or use the appropriate automated workflow if the renewal activity is represented by a qualifying supported record.

Why this survey design works: It combines loyalty, adoption, commercial context, and an open risk question without requiring the respondent to complete unnecessary detail.

B.6 Digital / Portal Experience Feedback

Business Scenario A customer has completed a task in a digital portal or online workflow. The product team wants to understand how easy the task was and capture enough technical context to investigate problems.

Item	Recommended approach
Purpose	Measure effort and capture the page, attempt count, reference information, and user explanation when a digital task is difficult.
Recommended Survey	Digital Experience Feedback
Survey Type	CES
Salesforce Context	Contact
Recommended Timing	Send immediately after the digital task or make the survey available from the relevant digital experience.

#	Question	Type	Required / Behavior
1	How easy was it to complete your task today?	CES	Required
2	Which task were you trying to complete?	Picklist	Required
3	If relevant, paste the page URL where you experienced the issue.	URL	Optional
4	Approximately how many attempts did it take to complete the task?	Number	Optional
5	Enter any reference or error code shown during the process.	Text	Optional
6	Please describe anything that made the process difficult.	Long Text Area	Optional

Question Dependency / Branching If CES indicates high effort, display the technical-context questions and description field.

Suggested Distribution Use a survey link or the distribution method appropriate to the digital workflow; automation can be used where a supported Salesforce record represents the completed interaction.

Why this survey design works: It captures an effort score first and requests troubleshooting context only when it can help explain a difficult experience.

B.7 Customer Follow-Up Request

Business Scenario A customer has asked for follow-up and needs a simple way to provide the preferred contact details, timing, reference information, and supporting documentation.

Item	Recommended approach
Purpose	Collect the practical information needed to organize a customer follow-up without relying on a long email exchange.
Recommended Survey	Customer Follow-Up Request
Survey Type	Custom
Salesforce Context	Contact
Recommended Timing	Use when a customer requests additional contact or support after a survey, meeting, or service interaction.

#	Question	Type	Required / Behavior
1	What is the best email address for this follow-up?	Email	Required
2	What is your preferred follow-up date?	Date	Optional
3	If you have a preferred appointment time, select the date and time.	Date/Time	Optional
4	Enter the related reference, ticket, or order number.	Text	Optional
5	What type of follow-up do you need?	Picklist	Required
6	Upload any supporting document or screenshot that would help us prepare.	File Upload	Optional
7	Please add any additional context for the follow-up.	Text Area	Optional

Question Dependency / Branching The requested follow-up type can be used to show or hide additional context fields when a particular request requires more information.

Suggested Distribution Share the survey link directly or include it in the appropriate follow-up communication.

Why this survey design works: It replaces unstructured back-and-forth with a concise, structured intake while still allowing attachments and free-text context.

B.8 Voice of Customer / Product Improvement

Business Scenario A product or customer experience team wants broader improvement ideas and a clear priority across several enhancement themes.

Item	Recommended approach
Purpose	Capture product feedback while demonstrating unique-column Matrix priority logic.
Recommended Survey	Voice of Customer Improvement Survey
Survey Type	VOC / Static or Custom
Salesforce Context	Contact or Opportunity
Recommended Timing	Use after a product review, pilot, or implementation milestone.

#	Question	Type	Required / Behavior
1	Which product or experience area are you providing feedback on?	Picklist	Required
2	Assign priorities 1–4 to Reporting, Mobile, Integrations, and Alerts.	Matrix Grid	Selectable Cells; one response per row; one use per column
3	Describe the improvement in your own words.	Long Text Area	Required
4	Upload a screenshot if helpful.	File Upload	Optional

Question Dependency / Branching Each priority can be used once. If “Other” is selected, display a short Text field.

Suggested Distribution Use the current VOC/Static condition when appropriate; otherwise distribute through Survey Builder.

Why this survey design works: It combines unique-priority Matrix logic with open feedback and supporting evidence.

Appendix C - Business Scenarios for Static Surveys & Automation

Static Surveys and Automation Command Center can both initiate survey delivery, but they are intended for different configuration needs. This appendix uses realistic scenarios to show why each capability may be selected.

C.1 When a Static Survey Fits

Static Surveys are appropriate when an existing predefined survey should be sent when a straightforward Salesforce condition is met. The current configuration uses Salesforce Custom Settings.

Static Survey Configuration Flow

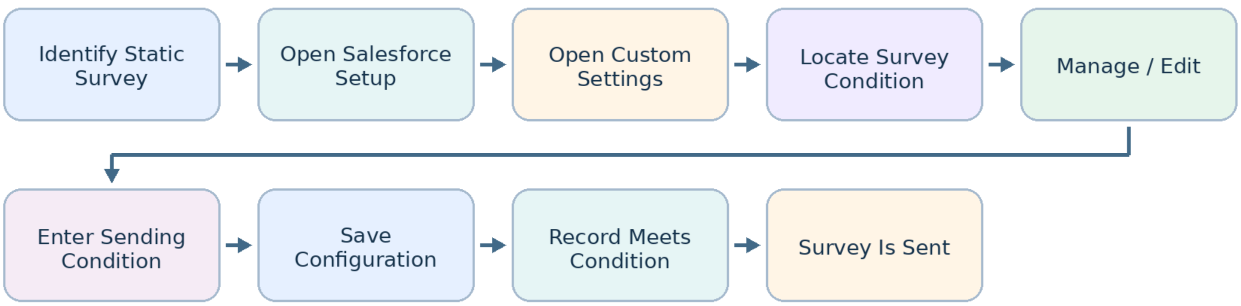

Figure C1. Static Survey configuration and send flow.

Business Scenario	Why Static Survey fits	Example condition/context
Case-closure satisfaction	A standard CSAT form should be sent whenever a Case reaches the configured closed state.	Static CSAT condition based on the Case status.
Post-opportunity VOC	A predefined VOC form should be sent when an Opportunity reaches the configured business condition.	VOC condition can use Opportunity fields, such as a closed/won stage when appropriate.
Contact-based VOC checkpoint	A predefined VOC form should be triggered when a Contact satisfies an agreed customer-experience condition.	VOC supports Contact context; administrators define the specific field condition in Custom Settings.

Static Survey strength A simple, repeatable condition can trigger a predefined survey without building a multi-step scheduling and reminder configuration.

C.2 When Automation Command Center Fits

Automation Command Center is appropriate when the survey workflow needs configurable qualification logic, initial send timing, reminders, or recurring processing.

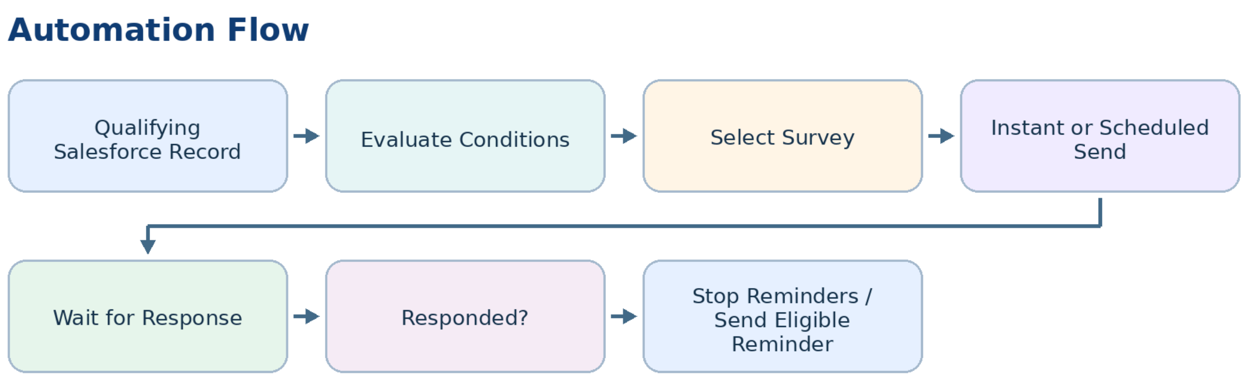

Figure C2. Automation scenario flow.

Business Scenario	Automation capability demonstrated
Quarterly customer review Event	Use Event conditions to identify the relevant review and send the survey after the qualifying event.
Training / implementation Event	Send immediately after the event or use Scheduled Send; remind only eligible non-responders.
Case-based follow-up	Use Case conditions to determine which records qualify, then select the survey, send timing, and reminder behavior.
Recurring scheduled processing	Run the initial survey delivery on the configured schedule and use an independent recurring reminder schedule for non-responders.

C.3 Static Survey vs Automation Command Center

Consideration	Static Survey	Automation Command Center
Primary setup	Salesforce Custom Settings and a condition for the predefined form.	Guided configuration wizard.
Qualification	Configured condition on the supported static survey context.	Business conditions built in the automation.
Initial send timing	Triggered when the configured static condition is met.	Instant Send or Scheduled Send.

Consideration	Static Survey	Automation Command Center
Reminders	Not the primary capability described in the current Static Survey guides.	Configurable reminder limit, reminder mode, template, and recurring reminder schedule.
Best fit	Simple predefined survey triggered by a Salesforce condition.	More flexible workflows requiring timing, conditions, and reminder management.

C.4 Example Combined Operating Model

An organization can use both capabilities at the same time. For example, routine Case-closure CSAT can use a Static Survey condition, while quarterly customer-review surveys and event follow-ups use Automation Command Center for scheduled delivery and reminders. The appropriate method depends on the business process rather than on a single organization-wide choice.

Appendix D - Upcoming Features

The following items are planned or in development and are not covered as available functionality in the main walkthrough. Documentation should be updated when each feature is released.

Upcoming Feature	Current description
Digital Workers	Planned capability intended to support automated or assisted customer-experience activities.
Active Surveys	Planned workspace for viewing and managing surveys that are currently active; the product experience is expected to evolve to include easier access to static survey functionality.
Survey Response Tracker Dashboard	Planned dashboard for monitoring survey distribution and response activity over time.
Platform Roadmap	Planned view for product capabilities and upcoming enhancements.

Release note Upcoming features may change before release. Customer-facing documentation should describe only the functionality that is available in the current product experience.