NPS Survey Builder App

Introduction:

1. Document Purpose

The User Guide aims to explain how to use the **NPS Survey form**. The document contains detailed information and images for better understanding.

2. App Overview Features & Usages

Using the NPS Survey form, create a dynamic survey form based on our requirements and business process. You can design surveys based on your specific needs and business processes, allowing full customization at any time. This application streamlines the process of collecting customer feedback and measuring NPS survey forms efficiently.

NPS Survey Builder App User Guide

Step 1: Log in to your Salesforce account (refer to Fig 1).

salesforce	San Diego and Salesforce + April 15-17, 2025 See how Tableau fuels Agentforce at Tableau
Usemame 1 Saved Username	Conference.
Password Log In	Get ready for the must-attend data and analytics event of the year with sessions and demos on how Tableau enriches AI agents with analytics skills. Save \$600 on early-bird pricing.
Remember me	Register now 더 Discover Agentforce 더
Forgot Your Password? Use Custom Domain	
Not a customer? Try for Free © 2025 Salesforce, Inc. All rights reserved. Privacy	

Figure 1: login your Salesforce org

Step 2: Register Experience Site

Go to Home => Quick Find Box => Search "Site". (refer to Fig 2)

Then, check the checkbox and Click "Register My Salesforce Site Domain".

(refer to Fig. 2)

Q sites	SETUP Sites
✓ User Interface	
✓ Sites and Domains	Sites Help for this Page 🥹
Custom URLs	
Domains	What is a Site?
Sites Security Trusted URLs	Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization fruncing hages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals. We forms for cases to so on. Because sites are hoted on Salesforce servers, there are no data integration issues. And because sites are built on native visual/orce pages, data validation on collected information is performed automatically. You can allow users to access your site. Create multiple sites that appeal to different audiences and sality our company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.
Didn't find what you're looking for? Try using Global Search.	Sample Domain Name apprcrownprivate/imited-dc-dev-ed_develop.my_sales/orce-sites_com/developers apprcrownprivate/imited-dc-dev-ed_develop.my_sales/orce-sites_com/developers apprcrownprivate/imited-dc-dev-ed_develop.my_sales/orce-sites_com/developers
	http://appycrownprivatelimited-dc-dev-ed.develop.my.salesforce-sites.com I have read and accepted the Salesforce <u>Sites Terms of Use</u> Register My Salesforce <u>Sites</u> Terms of Use

Figure 2: Register Experience Site

Step 3: Enable Digital Experience And Create Experience Site

- Go to Home => Quick Find Box => Search "Digital Experiences". (refer to Fig 3)
- After the Page reloads click on "New". For Creating Experience Site. (refer to Fig 4)

- Select "Build Your Own (Aura)" Experience site Template. (refer to Fig 5)
- Click on "Get Started" to create a new experience site. (refer to Fig 6)
- Enter "Site Name" and click on "Create". (refer to Fig 7)
- Choose the "Builder" option. For Customizing Experience Site. (refer to Fig 8).
- Click the "**Components**" option and drag the "**formPreview**" component to the content area for displaying the Survey Form. (refer to Fig 9)
- Click on the "Setting" icon to display the Thank You message. (refer to Fig 10)
- Choose "Standard Page". (refer to Fig 11)
- Click on the "**New Blank Page**" at the top-right. (refer to Fig 12)
- Choose "**1 full-width column**" from the current layout to display the Survey Form on the full page. Then click on "**Next**" (refer to Fig 13)
- Enter the "Name" and "API Name" of the thank you page and click on the "Create" button. (refer to Fig 14)
- Click on the **'Component**" and drag "**thankYouPreviewPage**" on the content body. To display a **Thank you message** after submitting the **Survey Form**. (refer to fig 15)

Note:

- Click on the "Page Properties"/"Gear Icon" and verify the URL. Verify the URL of the "thankYouPreviewPage". Make sure "-" is not included in the URL. (refer to Fig 16)
- 2) Create an Audience and Assign.
 - a) Click on the "Gear Icon" of the ThankYou Page ⇒ Click on Page
 Variation ⇒ Create Audience ⇒ Follow the Steps from the Fig 17 Image
 using the Guest User Profile Name and Any User Profile that needs
 access to the page ⇒ Click on "Save & Assign" button. (refer to Fig 17)
- 3) Click on the "**Publish**" from the top-right of the page. (refer to Fig 18)
- 4) Click the "Setting" icon and check the "Public Access" checkbox. (refer to Fig 19)
- Go to Home => search "Orgination Wide Addresses" and click on "Add". Then Enter "Display Name", and "Email" Check the checkbox for "Allow All Profiles to Use this From Address" and click "Save". (refer to Fig 20)

Note:- Check Your email and verify it.

Q digital Experiences	settup Settings	tillfit i
 Feature Settings 		×
 Digital Experiences 	Build pixel-perfect websites, portals, communities, and forums with Experience Cloud. Learn More	
Salesforce CMS	To start creating your sites, enable digital experiences.	
Settings	Save	
Didn't find what you're looking for?	Enable Digital Experiences I = Required Information	n
Try using Global Search.	After you enable digital experiences in your org, you must still create, configure, customize, and then activate a site before it's live and available to users.	

Figure 3: Digital Experience

Q digital Experiences	Settings	2723-44447 - XXIII, AMAZAMA, AZZASANAT, XXIII, AXIII, AXIII, AZZASANAT, XXIII, AMAZAMAT, XXIII, AMAZAMAT, XXIII,
V Feature Settings V Digital Experiences	Digital Experiences	Visit our Traiblazer CommunityHelp for this Page 🥑
All Sites		
Pages	Success: You can now create new Experience cloud sites.	
Salesforce CMS	The list shows Experience Cloud sites in your org. Clicking on the URL takes you Experience page to see your archived sites.	irectly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the Digital Experience app in Lightning
Settings	Maximum number of published and unpublished sites: 100	
Templates	All Sites	
Themes	No Sites	
Didn't find what you're looking for?		

Figure 4 Create New Experience Site



Figure 5: Experience site Template



Figure 6: Create Experience Site



Figure 7: Enter Name and Create



Figure 8: Customize Experience site

Ŧ	Components	8
	Q Search	Content Header
\$ ==	Book Slots My Appointments My Appointments runtime_appointmentbookin Scheduler - Operating Hours Work Procedure Step Progres Custom Components (4) Some components in this section some components in this section surface the site's security level setting. More Details	
L.(1 2 3.	formPreview initSurvey questionPreview thankYouPreviewPage Get more on the AppExchange Want more components on you	k Take a Tour in the Help menu. to at the Pages menu. page? Drag and drop components from the Components panel.

Figure 9: Drag component for display Survey form

	Home	101 -	C ¹	
		Page Properties		
*	Pages	~	Properties Page Variations	< -
-	Q Find a page		Name 🕢	^
=	🕈 Home		Home	
	Create Record			
	Error			
	> Generic Object		API Name Home	
	> Login		Page Access	
	Search		Site Default Setting: Requires Login	
	Service Not Available Availability	0	SEO	_
	Too Many Requests Availability	•	Help people find your pages more easily by adding search engine optimization (SEO) properties. The text fields in this section are translatable. Learn More	
Le			Title ()	
1.			Home]
2.			Description	
4.	+ New Page		Page description that can appear in search engine results.	

Figure 10: Display Thank You Message

New Page What type of page would you like to create?				
Standard Page Create a page that's based on a layout and add any combination of components.	Object Pages Create record detail, list, and related list pages connected to a Salesforce object.			
	க			

Figure 11: Choose Standard Page

	New Page Choose a preconfigured page or start with a blank page layout.				
	earch	+ New Blank Page	ļ		
	Account Management		-		
	Contact Support				
	Enablement Lesson Exercise				
	Enablement Link Exercise				
	Enablement Milestone Detail				
	Enablement Video Exercise				
	Feed Detail				
	File Detail		-		
(- 8	ack	Next			

Figure 12: Choose a New Blank Page

New Page Choose a content layout that defines the regions of your page.					
+					
Current Layouts					
1 full-width column	2 columns, 1:2 ratio	2 columns, 1:1 ratio	2 columns, 2:1 ratio		
2 columns, 2:1 ratio, split sidebar	3 columns, 1:1:2 ratio	3 columns, 1:2:1 ratio	3 columns, 1:1:1 ratio		
← Back			Next		

Figure 13: Choose Experience Site Page Layout

New Page Give your page a name and a URL	
* Name ThankYou * URL / thankyou-	
API Name ThankYou	
Eack	Create

Figure 14: Enter Name and API Name

_		
	Components	\geq
	Q Search	
	Search	
	Book Slots	^
	My Appointments	
	Reschedule Slots	
¢r 🚺	runtime appointmentbookin	
_	Scheduler - Operating Hourr	
	Scheduler - Operating Hours	
	work Procedure Step Progres	
	 Custom Components (4) 	
	Some components in this section	
	are blocked due to the site's security level setting. More Details	
	formPreview	
	1 initSurvey	
	guestionPreview	_
	f thankYouPreviewPage	
		~
	Get more on the AppExchange	

Figure 15: Drag Thank You component

	ThankYou	\$ -	C	
* * 	Pages Q Find a page Thome Create Record Error Comprise Object	Page Properties	Properties Page Variations Name ThankYou URL (thankyou Change URL	
	Seneric Object Login Search Service Not Available Availability Theology	0	API Name ThankYou_c Page Access Site Default Setting: Requires Login	
	Too Many Requests Availability	•	SEO Help people find your pages more easily by adding search engine optimization (SEO) properties. The text fields in this section are translatable. Learn More Title ThankYou	
	+ New Page		Description 1	

Figure 16: Verify the Thank you Page URL.

	ThankYou	\$ • C	o_¢	Ţ	?	Previe
÷	Pages	Edit Audience Edit your audience's criteria. If the audience is assigned, the changes take effect immediately on your published community.	<			
1	ft Home	Guest User				
\$	Error Seneric Object	Audience Criteria Audience Matches When All Conditions Are Met				
	> Login Search	Criteria Type Operator Value User > Profile > Name equals Value System Administrator X				
	Service Not Available Availability ThankYou Teo Menu Resumes Availability	NPS Survey Profile X	1			
	iou many requests availability	Cancel Save & Assign				

Figure 17: Create an Audience and Assign.

Publish your site?	
Publish	
S appycrownprivatelimited-dc-dev-ed.develop.my.site.com/s	
Salesforce serves this domain using a content delivery network (CDN).	
Publication Description 🕕	
Describe the changes that you made to the site	
	0 / 200
We'll send an email confirmation when your changes are live. To avoid errors, wait till pu is finished before you make further changes to the site.	blication
Cancel	Publish

Figure 18: Publish the Experience Site.

4	Settings	General	×
1	General	View and edit the main properties of your site.	
	General Theme Languages Navigation Mobile Publisher SEO CMS Connect Advanced Security & Privacy Developer Updates	View and edit the main properties or your site. Site Details Template Build Your Own Public Access G Guest users can see and interact with the site without logging in Site Title NPS Survey Builder Published Status Published: https://appycrownprivatelimited-dc-dev-ed.develop.my.site.com/s Guest User Profile Configure access for guest or unauthenticated users. Learn More	
	Change History	NPS Survey builder Prolife	

Figure 19: Check Public Access.

Q org	SETUP Organization-Wide Addresses
Hyperforce Assistant	
∼ Email	Save and New Cancel
Organization-Wide Addresses	Organization-Wide Email Address
 Development Scratch Orgs 	Display Name Saleshub Email Address rasheed@Salesfoece.info Purpose User Selection
Didn't find what you're looking for? Try using Global Search.	Allow All Profiles to Use this From Address Allow Only Selected Profiles to Use the From Address
	Profiles System Administrator Analytics Cloud Integration User Analytics Cloud Integration User External Apps Login User External Apps Login User Minimum Access - Salesforce B2B Reordering Portal Buyer Profile Salesforce API Only System Integrations Standard Platform User Customer Community Login User
	Permission Sets No Permission Sets configured
	Save and New Cancel

Step 4: Activate Experience Site

- Click on "Workspaces" and click on "Administration" from the options. (refer to Fig 21)
- Click on "Activate" to activate the "Experience site". (refer to Fig 22)
- Click on "Members", and check in the "Available Permission Set".
 If "Survey Builder Guest User" is not available, move to "Selected Permission Set" and click "Save." (refer to Fig 23)



Figure 21: Administration.

Administration NPS Survey	
Settings	Settings
Preferences	
Members	When a site is activated, new members receive a welcome email message. If you don't want new members to receive the email, deselect the Send welcome email checkbox in Emails.
Contributors	
Login & Registration	NPS Survey // https://appycrownprivatelimited-dc-dev-ed.develop.my.site.com/nps1
Emails	
Pages	Status Preview Activate
Rich Publisher Apps	Template Build Your Own Change Template
URL Redirects	

Figure 22: Activate Experience Site.

Administration NPS Survey	
Settings	Minimum Access - API Only Integrations Minimum Access - Salesforce
Preferences	Remove Salesforce API Only System Integrations
Members	Solution Manager Standard Platform User
Contributors	Stalibard User
Login & Registration	Select Permission Sets
Emails	Find
Pages	Available Permission Sets Selected Permission Sets
Rich Publisher Apps	Experience Profile Manager SCRT2 Integration User Survey Builder Admin Permission
URL Redirects	Add Remove
	Site Role
	Want to use custom labels instead of Employee, Customer, or Partner? Select Custom to replace the standard labels. If you don't want to use one or more, just leave the fields empty.
	Default Custom
	Save Cancel

Figure 23: Check Permission Set.

Step 5: Assign Permission Set

1.	Go to Home>Quick Find Box> Search "Permission Set" and Find
	"Survey Builder Guest User". Assign to the Guest User to create
	the record.
	(refer to Fig 24)
	a. Click on "Manage Assignments" (refer to Fig 25)
	b. Click on the "Add Assignment" to assign to the Guest
User.	
	(refer to Fig 26)
	c. Check the checkbox of "NPS Survey Builder Site Guest
User".	
	Click on the "Next" button. To assign Permission Set to
	the Guest
	User. (refer to Fig 27)
	d. Click on the "Assign" button to assign the permission set
	to the
	Guest User. (refer to Fig 28)
	e. Click on " Done " to assign a Guest User. (refer to Fig 29)
2.	Go to Home>Quick Find Box> Search "Permission Set" and Find
	"Survey Builder Admin Permission". Assign to the Admin to
	create, read and update the record. (refer to Fig 24)

a). Click on "Manange Assignment" to assign the permission

set to the

Admin. (refer to Fig 30)

- b). Click on the "Add Assignment" to assign. (refer to Fig 31).
- c). Choose "System Administrator" Profile and click on the

"Next"

Button. (refer To Fig 32).

d). Click on the "Assign" button to assign the permission

set.(refer to Fig33)

e). Click on the "Done" button for assignment. (refer to Fig 34).

Q Permission	SETU Per	rmission Sets)))(**))(**///**	9	938-94 C 7777- 5338-94 C 7777- 5348 C C 589990
✓ Users					
Permission Set Groups	Peri	mission Sets			Help for this Page
Permission Sets					
	On this page yo	ou can create, view, and manage permission	n sets.		
 Custom Code 	All Permisei	on Sate x Edit Doloto Croate New Men			
Custom Permissions		Circle Content Content of Content			ų
	New 😋			A B C D E F G H	I J K L M N O P Q R S T U V W X Y Z Other
Didn't find what you're looking for?	Action	Permission Set Name 1		Description	License
Try using Global Search.	Clone	Salesforce Pricing Manager		Allow create, read, and edit access to all pricing objects and features.	Salesforce Pricing Run Time
	Clone	Salesforce Pricing Run Time User	Permission Set Name	Allow read access for all Salesforce Pricing objects.	Salesforce Pricing Run Time
	Clone	Salesforce Scheduler Greeter		Let users manage drop-in customers and customers with scheduled a	Salesforce Scheduler Greeter
	Clone	SeaS Indexing C2C User Perm		Allows the user to access entities indexed by SeaS indexing pipeline.	Cloud Integration User
	Clone	Security Center Integration User		Access Security Center for Integration	Cloud Integration User
	Clone	Seller-Focused Sales Mobile Experience		Use an experience that's tailored for sellers on mobile. Easily view an	Salesforce
	Clone	Service Cloud User		Denotes that the user is a Service Cloud user.	Service User
	Clone	Shopper		Allow access to B2C Commerce features.	Commerce User
	Clone	Slack Service User		Lets users run the flows for swarming with Service Cloud for Slack.	Slack Service User
	Clone	Standard Einstein Activity Capture		Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
	Clone	Survey Builder Admin Permission			
	Clone	Survey Builder Guest User			

Figure 24: Search Permission Set.

Permission Set Survey Builder Guest User	
Clone Manage Assignments View Summary	

Figure 25: Manage Assignment.

> SETUP > PERMISSION SET 'SURVEY BUILDER GUEST USER' Survey Builder Guest User		
Current Assignments		🖉 💼 🛛 Add Assignment

Figure 26: Add Assignment.

1 item s	elected						Q s	earch this lis	t 🕅 🕸 🕶 🗌 C	•
-	Full Name	↑ ~	Alias 🗸	Username 🗸	R	tole	\sim	Active \checkmark	Profile	-
	\mathbf{O}	Ankit Kumar	AKuma	testnps@nps.com				~	System Administrator	-
	C	Chatter Expert	Chatter	chatty.00dwu00000ivb9j2ah.ombajkolj0jb@chatter.salesforce.com				×	Chatter Free User	-
	\mathbf{O}	Integration User	integ	integration@00dwu00000ivb9j2ah.com				×	Analytics Cloud Integration User	
	\mathbf{O}	NPS Survey Builder Site Guest User	guest	nps_survey_builder@00dwu00000ivb9j2ah.org.force.com				V	NPS Survey Builder Profile	-
	$\mathbf{\Theta}$	Security User	sec	insightssecurity@00dwu00000ivb9j2ah.com				V	Analytics Cloud Security User	-
Can	al									Next
Cano										INEXt

Figure 27: Assign Permission Set to the Guest User.

Selected Use	rs							
Full Name	\sim	Role	\sim	Profile \checkmark	Active	User License 🗸 🗸	Expires On	\sim
NPS Survey Builder Site	e Guest			NPS Survey Builder Profile	\checkmark	Guest User License	Never Expires	
Cancel							Back	ign

Figure 28: Assign to the Guest User.

Assignment Sumn	mary						
Full Name	~	User License	\sim	Expires On	Time Zone 🗸 🗸	Status	~
NPS Survey Builder Site Gu	iest User	Guest User License				Success	
							Done

Figure 29: Assigned.

Survey Builder Admin P	ermission		
Q Find Settings 🛞	Clone Manage Assignments View	Summary	
Demois siene Act Oreconsistent			
Permission Set Overview			
Permission Set Overview Description			
Permission Set Overview Description License			
Permission Set Overview Description License Session Activation Required			

Figure 30: Manage Assignments.

> SETUP > PERMISSION SET 'SURVEY BUILDER ADMIN PERMISSION' Survey Builder Admin Permission	
Current Assignments	Add Assignment

Figure 31: Add Assignment to the Guest User.

	All Use	′S ▼							, ,
1 item :	selected					٩ ٥	earch this lis	t	•
-	Full Nam	• † ~	Alias 🗸	Username \checkmark	Role	e v	Active \checkmark	Profile \checkmark	
~	\mathbf{O}	Ankit Kumar	AKuma	testnps@nps.com			V	System Administrator	
	C	Chatter Expert	Chatter	chatty.00dwu00000ivb9j2ah.ombajkolj0jb@chatter.salesforce.com			~	Chatter Free User	•
	0	Integration User	integ	integration@00dwu00000ivb9j2ah.com			~	Analytics Cloud Integration User	•
	\mathbf{O}	NPS Survey Builder Site Guest User	guest	nps_survey_builder@00dwu00000ivb9j2ah.org.force.com			V	NPS Survey Builder Profile	
	\mathbf{O}	Security User	sec	insightssecurity@00dwu00000ivb9j2ah.com			~	Analytics Cloud Security User	•
Can	icel								Next

Figure 32: Choose Admin User.

Selected Users	;								
Full Name	~	Role	\sim	Profile 🗸	Active	User License	\sim	Expires On	~
Ankit Kumar				System Administrator	~	Salesforce		Never Expires	
Cancel								Back	Assign

Figure 33: Assign To The Admin.

Survey B	on set 'survey bu Builder Adm	nin Permission	I' > MANAGE ASSIG	SNMENTS				
Assignment Sur	mmary							
Full Name	~	User License	\sim	Expires On	Time Zone	\sim	Status	~
Ankit Kumar		Salesforce					Success	
								Done

Figure 34: Assigned.

Step 6: Update Experience Site URL.

- Go to Home> Quick Find Box> Search "All Sites" and copy the URL.(refer to Fig 35)
- Go to Home> Quick find Box> Custom Setting and click on the "SurveyFormPage".(refer to Fig 36)
- Click on "Manage". To update the SurveyFormUrl and Thank You Page URL.

(refer to Fig 37)

- Click on the "**New**". To update the Form URL and Thank you Page URL. (refer to Fig 38).
- Paste the copied URL in the "**FormPageURL**". and after Url add '/s'.

For example:- https://abc.develop.my.site.com/nps1/s

In the "**ThankYouPageURL**" paste the same Url and after Url give '/' and add the thankYou Url. (refer to Fig 39 and 40).

For Example:- https://abc.develop.my.site.com/nps1/thankyou

• Click on the "**Save**" button to save the URL.

Setup Home Object	Manager 🗸		e	11 - STITT 1 / SSU	NNN 10012 11005 1111	A A A A A A A A A A A A A A A A A A A	Z = 111117 Z XXXXXX 1000
Q All sites	SETUP All Sites	CSUG (7 - XNANNSZAMUM		ZZ ANGATAN	Omer - Drigen a		279, (1677) - SWANNOZHINO
Feature Settings							
✓ Digital Experiences	Digital Experie	ences				Visit our Trailbla	zer CommunityHelp for this Page
All Sites	9						
Didn't find what you're looking for?	The list shows Experience C Experience page to see you Maximum number of publi	loud sites in your org. Clicking (r archived sites. shed and unpublished sites:	on the URL takes you dired	tly to the site. If you're	not a site member, the URL ISN'I	linked. Archived sites aren't included in this list. Check the Digital Exp	erience app in Lightning
Try using Global Search.	All Sites		New				
	Action	Name	Description	Framework	URL		Status
	Workspaces Builder	NPS Survey Builder		Aura	https://appycrownprivatelim	ted-dc-dev-ed.develop.my.site.com	Preview
				1	F igure 35: Cop	ny URL.	
				1	F igure 35: Cop	ry URL.	
Custom Settings]	F igure 35: Cop	ry URL.	Help for this Page ਓ
Custom Settings Use custom settings to create and repeated queries. Custom setting	I manage custom data at data can be used by for	the organization, profile, nula fields, Visualforce,	, and user levels. Cu Apex, and the Web	stom settings da Services API.	Eigure 35: Cop	by URL.	Help for this Page 📢 vithout the cost of
Custom Settings Use custom settings to create and repeated queries. Custom setting View: All Create New View	manage custom data at s data can be used by for	the organization, profile nula fields, Visualforce,	and user levels. Cu Apex, and the Web	istom settings da Services API. Get Usage	Figure 35: Cop	by URL.	Help for this Page 📢 vithout the cost of
Custom Settings Use custom settings to create and repeated queries. Custom setting View: Ali Casta New View	I manage custom data at data can be used by for	the organization, profile, nula fields, Visualforce,	, and user levels. Cu Apex, and the Web	istom settings da Services API. Get Usage	a is stored in the applica	by URL. tion cache. This means you can access it efficiently, w F G H I J K L M N O P Q R S T U	Help for this Page 📢 vithout the cost of V W X Y Z Other 🚺
Custom Settings Use custom settings to create and repeated queries. Custom setting View: All Create New View	I manage custom data at d data can be used by for	the organization, profile, nula fields, Visualforce,	, and user levels. Cu Apex, and the Web	Istom settings da Services API. Get Usage New	a is stored in the applica	The second state of the se	Help for this Page $\$ without the cost of $V W X Y Z $ Other \land
Custom Settings Use custom settings to create and repeated queries. Custom setting View: All Create New View Action Label +	I manage custom data at d data can be used by for Visibility	the organization, profile, nula fields, Visualforce, Settings Type	, and user levels. Cu Apex, and the Web Namespace I	stom settings da Services API. Get Usage New Prefix	a is stored in the applica	The second Size Number of Records	Help for this Page vithout the cost of V W X Y Z Other A Total Size

Figure 36: Edit Custom Setting.

Custom Setting Definition SurveyFormPage				Help for this Page 🧲
Create the fields for your custom setting.	The data in these fields are cached with the application.			
Custom Setting Definition Detail	Manage			
Label	SurveyFormPage	Object Name	SurveyFormPage	
API Name	npssurveyappSurveyFormPagec	Setting Type	Hierarchy	
Visibility	Public	Description		
Namespace Prefix	npssurveyapp	Created Date	18/02/2025, 10:39 am	
Last Modified Date	18/02/2025, 10:39 am	Record Size	610	

Figure 37: Manage Custom Setting.

Custom Setting SurveyFormPage	Help for this Page 🕜
If the custom setting is a list, click New to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.	
If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the a or just a general user.	op, a specific profile,
New	K
▼ Default Organization Level Value	
View: All Create New View	W V V 7 Other All

Figure 38: Manage Custom Setting.

SurveyFormPage Edit Provide values for the fields you created. T	his data is cached with the application.
Edit SurveyFormPage	Save
SurveyFormPage Information	
Location FormPageURL ThankyouPageURL	Saleshub https://force-momentum-234 https://force-momentum-234

Figure 39: Paste URL.

	ThankYou	\$ -	C	
Ŧ	Pages	×	Properties Page Variations	<
1	Q Find a page		Name 🕚	Â
Ξ	🕈 Home		ThankYou	
\$	Create Record		URL ① /thankvou	
	Error		Change URL	
	> Generic Object			

Figure 40: Copy ThankYou URL.

Step 7: Check Access To The Guest User.

• Go to Home>Quick Find Box>search "General Setting" under "Feature Settings".

Click on the "Edit" button. (refer to Fig 41)

- Make sure the checkbox is checked for "Allow site guest users to upload files". and "Save". For Upload files by the Guest User. (refer to Fig 42)
- Go to Home> Quick Find Box> search "Deliverability". (refer to Fig 43)
 Note:- Make sure "Access to send Email" is "All Email".

Q General Settings	SETUP General Settings
 Subscription Management 	
General Settings	Salesforce Files Settings
✓ Feature Settings	Use this page to modify Salesforce Files settings for your organization.
✓ Salesforce Files	Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments
General Settings	Files posted on user profiles in communities are visible only to members of the community where the files originated.
Didn't find what you're looking for? Try using Global Search.	 Libraries in Salesforce Files. 1 Skip triggers execution when deploying asset files 1 Skip triggers execution and validation rules on asset files 1 Display atternative file previews 1 Allow site guest users to upload files 1 Set file access to Set by Record for files attached to records 1 Use the File Upload Lightning web component for LWR sites 1 Enable Files to be ingested into Data Cloud 1
	Edit

Figure 41: Check The Access.

Q General Settings	General Settings	
✓ Subscription Management		Hele for this Dage
General Settings	Salestorce Files Settings	riep for this rage
 Salasforca Eilas 	Use this page to modify satestorce Files settings for your organization.	
General Settings	Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments Files posted on user profiles in communities are visible only to members of the community where the files originated. Files posted on user profiles in communities are visible only to members of the community where the files originated. Files posted on user profiles in communities are visible only to members of the community where the files originated. Files posted on user profiles in communities are visible only to members of the community where the files originated. Files posted on user profiles in communities are visible only to members of the community where the files originated. Files posted on user profiles in communities are visible only to members of the community where the files originated. Files posted on user profiles in communities are visible only to members of the community where the files originated. Files posted on user profiles in communities are visible only to members of the community where the files originated. Files posted on user profiles in communities are visible only to members of the community where the files originated. Files posted on user profiles in communities are visible only to members of the community where the files originated. Files posted on user profiles in communities are visible only to members of the community where the files originated is the files originated. Files posted on user profiles in communities are visible only to member or posted on user posted on us	
Didn't find what you're looking for? Try using Global Search.	Lonaries in Subscroter Files. Skip triggers execution when deploying asset files. Skip triggers execution and validation rules on asset files. Daplay atternative file proviews. Allow store used titles.	
	Files uploaded by guest users are public by default. We recommend changing the owner of these files to avoid this. You may also wish to restrict file upload size using community file moderation.	
	Set file access to Set by Record for files attached to records 1	
	Use the File Upload Lightning web component for LWR sites 1 Enable Files to be ingested into Data Cloud 1	
	Save Cancel	

Figure 42: Give The Access.

Q Deliverability	SETUP Deliverability		
Deliverability	Deliverability		
Test <mark>Deliverability</mark>	Configure the settings on this page to improve Other settings apply to emails sent through Sa	e your organization's email deliverability. Some settings alesforce or email relay only.	apply to emails sent through Salesforce and emails sent through external accounts that you can connect to Salesforce.
Didn't find what you're looking for? Try using Global Search.	Deliverability	Save	
	Access to Send Email (All Email Service	es)	= Required Information
	Access level All email		

Figure 43: Check Deliverability

Step 8: Create Sharing Settings

- Go to Home>Quick Find Box>search "**Sharing Settings**". (refer to Figure 44)
- Search the "Field Mapping" object under "Sharing Rule" and click on "New". (refer to Figure 45)
- Enter "Rule Label" and check the checkbox of "Guest User Access".

(refer to Figure 46)

 Choose the "Created By Id" field, "not equal to" operator and the value will be "empty". Also, Choose "Share With" your Guest User name.

Then, click on **"Save" to save "Sharing Settings"**. (refer to Figure 47)

Note:- Please do the same points for the "Question", "Question Rule", "Response", Score Level",

"Survey Distribution", and "Survey Form" for creating Sharing Settings.

Q sharing Settings	Sharing Settings			
• secondy	Ob avia a Cattia aa			Hole for this Dage
Sharing Settings	Sharing Settings			The for the rage 🥥
Didn't find what you're looking for? Try using Global Search.	This page displays your organization's sharing s default or a parallel sharing recalculation. Manage sharing settings for: All Objects	ettings. These settings specify the level of access your users have	to each others' data. Go to <u>Background Job</u>	\underline{s} to monitor the progress of a change to an organization-wide
	Disable External Sharing Model Default Sharing Settings Organization-Wide Defaults	Edit		Organization-Wide Defaults Help 🕐
	Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
	Lead	Public Read/Write/Transfer	Private	×
	Account and Contract	Public Read/Write	Private	✓
	Contact	Controlled by Parent	Controlled by Parent	×
	Order	Controlled by Parent	Controlled by Parent	✓
	Asset	Controlled by Parent	Controlled by Parent	✓
	Opportunity	Public Read/Write	Private	×
	Case	Public Read/Write/Transfer	Private	×
	Campaign	Public Full Access	Private	1

Figure 44: Sharing Setting

Sharing Settings			
No sharing rules specified.			
3			
Work Type Sharing Rules	New Recalculate		Work Type Sharing Rules Help 📀
No sharing rules specified.			
Work Type Group Sharing Rules	New Recalculate		Work Type Group Sharing Rules Help 🧿
No sharing rules specified.			
Field Mapping Sharing Rules	New Recalculate		Field Mapping Sharing Rules Help 🧿
Action Criteria		Shared With	Access Level

Figure 45: Search Object Name

Step 1: Rule Name	I [*] ⊂ Required Information
Label	
Rule Name	
Description	
Step 2: Select your rule type	
Rule Type	Based on record owner ○ Based on criteria ○ Guest user access, based on criteria

Figure 46: Enter Rule Name

Sharing Settings				
Step 3: Select which records to be s	hared			
	This sharing rule unlimited access use cases and ir data to guest us	e grants access to guest us to all records matching th nplications, and implemen ers related to this change	ers without login credentials. By m ese criteria to anyone accessing th t security controls that you think ar from default settings.	notifying the default settings in accordance with these criteria, you're allowing immediate and he site, even without logging in. To secure your site and its data from guest users, consider all the expropriate for the sensitivity of your data. Salesforce isn't responsible for any exposure of your
Criteria	Field	Operator	Value	
	Created By ID 🗸	not equal to 🗸		AND
	None V	None V		AND
	None 🗸	None 🗸		AND
	None 🗸	None V		AND
	None V	None V		
Additional Options	Add Filter Logic	high-volume users 👔		
Step 4: Select the users to share wit	h			
Share with	NPS Survey Site Guest	User 🗸		
Step 5: Select the level of access for	r the users			
Access Level	Read Only ~			
	Se	Cancel		

Figure 47: Select a Field and Share With

Step 8: Create a Survey Form

- Go to App Launcher > Search box> Type "NPS Survey Builder ", and click on NPS Survey Builder (refer to Figure 48).
- In NPS Survey Builder, on the bottom side, you will see two buttons,

"Create New" and "Select Existing (refer to Figure 49)."

• Enter "Survey Form Name", "Survey Form Description" and "Select Survey Type". Then click on "Create New". For creating a new survey form. Also, You can **navigate** and **update the** survey form using navigation. (refer to Fig 50)

-	Q, Search	* 🖬 🚓 ? 🌞 💻 🐻
Sales Home Opportunities V Leads V Tasks V Files	\checkmark Accounts \checkmark Contacts \checkmark Campaigns \checkmark Dashboards \checkmark	Reports 🗸 Chatter Groups 🗸 Calendar 🗸 More 🔻 🎤
App Launcher ×		
Q NPS Survey		
Apps	Plan My Accounts	Grow Relationships
NPS Survey Builder	Accounts owned by me	Contacts owned by me and created in the last 90 days
R NPS Survey		
Items \$0 Open	0 Upcoming Activity	O Upcoming Activity
NPS Survey	2	
View All	Accounts	Contacts
• S0 Lost	0 No Activity	O No Activity
View Opportunities	View Accounts	View Contacts
Build Pipeline	My Goals 💿	Today's Events
Leads owned by me and created in the last 30 days	Set personal weekly or monthly goals for emails, calls, and meetings.	

Figure 48: open NPS Servey Builder

NPS Survey Builder			
Create Survey Form			✓
Name your new survey Survey Form Name	Description	About Survey Form	
Select the type of survey you want to send			
Net Promoter Score	Customer Satisfaction Score (CSAT)	Customer Effort Score (CES)	Others
1 2 3 4 5 6 7 8 9 10	★★☆	Very Difficult Difficult Neutral Easy Very Easy	🎔 ★ 😊 🛈
	Create New	Select Existing	

Figure 49: Create New and Select Existing Survey

Create Survey Form		✓ ✓ ✓	1
Name your new survey Test User Survey Form	Description	Test Survey Description	a G
Select the type of survey you want to send			
Net Promoter Score	Customer Satisfaction Score (CSAT)	Customer Effort Score (CES)	Others
1 2 3 4 5 6 7 8 9 10	★★☆	Very Difficult Difficult Neutral Easy Easy	• \star 🙂 🛈
	Create New	Select Existing	

Figure 50: Create Survey Form

Step 9: Configure Survey Object

- On the "Configure Survey Object"
 - Choose "**Object**" for the Mapping Survey Form. (refer to Fig 51)
 - Choose "Prevent Duplicate" for the clone Survey Form. (refer to Fig 52)
 - Click on the "Save" button to save the record. (refer to Fig 53)
 - Click on the "**Cancel**" button to refresh the page. (refer to Fig 54)
 - After Page refresh click on the "**Select Exiting**" button. To Update the Survey Form.
 - Select the Survey Form to update, Click on the drop-down
 "▼" icon, and you will see the button "Edit". To update the Survey Form. (refer to Fig 55 and 56)
 - You get the saved record. Now click on the "**Update**" button to update the survey form. (refer to Fig 57)
 - Click on the **"Save&Contine"** and also, use **navigation** to move to the next page. (refer to Fig 58)

	Configure Survey Object	<			1	1	
Survey from Object							
Case							
Account							
✓ Case Opportunity							
Prevent Duplicate							
'							
res							
		Back	Cancel Save	Save and Continue			

Figure 51: Select an Object

	V	Configure Survey Object				✓	~	
Surve	y from Object							
Case		•						
Surve	y Record Ownership							
User	Jser							
Preve	nt Duplicate							
Yes								
V Ye			Back Cano	el Save Sav	e and Continue			

Figure 52: Select a Prevent Duplicate

Configure Survey Obj	et	×		✓
Survey from Object				
Case 💌				
Survey Record Ownership				
User User				
Prevent Duplicate				
Yes 💌				
	Back Cancel Save Save and Continue			

Figure 53: Selecting Survey from the object and prevent Duplicate

NPS Survey Builder			
Create Survey Form			
Name your new survey Survey Form Name	Description	About Survey Form	
Select the type of survey you want to send			
Net Promoter Score	Customer Satisfaction Score (CSAT)	Customer Effort Score (CES)	Others
1 2 3 4 5 6 7 8 9 10	★★☆	Very Difficult Difficult Neutral Easy Easy	🎔 ★ 😊 🛈
	Create New	Select Existing	

Figure 54: Refresh and open the main page

NPS Survey Builder			
Create Survey Form			
Name your new survey Survey Form Name	Description	About Survey Form	ø
Select the type of survey you want to send			
Net Promoter Score	Customer Satisfaction Score (CSAT)	Customer Effort Score (CES)	Others
1 2 3 4 5 6 7 8 9 10	★★☆	Very Difficult Difficult Neutral Easy Easy Easy	🎔 ★ 😊 🛈
	Create New	Select Existing	

Figure 55: Select Existing Survey

5 Survey Forms						Create New
Name 🗸	Description \checkmark	Category	~	Object Name	Duplicate	~
test data						
test data						
testing data						
Test on 03 Feb				Account		
Test For the Header	Test Description					
Test User				Case	Yes	•
hjb						
Service Satisfaction Survey	The Service Satisfaction Survey helps busines	others		Case	Yes	
Test By Ankit - Clone test	Test Description.	CES		Case	Yes	
Previous		P	age 4 of 4			Next

Figure 56: click on the Select Existing button to move to the Survey Forms

Table.

NPS Survey Builder											
Create Survey Form	✓ ✓		✓								
Name your new survey Test Survey Form	Description	Test Survey Description									
Select the type of survey you want to send											
Net Promoter Score	Customer Satisfaction Score (CSAT)	Customer Effort Score (CES)	Others								
1 2 3 4 5 6 7 8 9 10	★★☆	Very Difficult Difficult Neutral Easy Kery Easy	🎔 ★ 😊 🛈								
Update Create New Select Existing											

Figure 57: Click the Edit button will redirect to the NPS Survey

Builder

4	Configure Survey Object		✓ ✓		✓		✓	
Survey from Object								
Account	•							
Survey Record Ownership								
User User								
Prevent Duplicate								
Ves	•							
		Ę	Back Cancel	Save Save and G	Continue			

Figure 58: Click the Save&Continue button

Step 10: Add Questions and Branding

- Without creating any questions, click on the "Save and Continue" button, You will get a popup saying
 "Please Add At Least One Question." (refer to Fig 59)
- Drag and Drop, where you can select any data type to create a question as per your business needs. Once dragged the question popup model will open. (refer to Fig 60)
- If you don't want to give a score for the question make it check the checkbox of the "Do Not Score". (refer to Fig 61)
- If you want to score that question, then fill in "Correct Answer Score", "Correct Question When" and "Answer Keyword". (refer to Fig 62)
- Click on the edit "\$\sum_" icon so you can make changes to the questions and click on the "Save" button to save the question. (refer to Fig 63)
- Click on the "①" and you will see the purpose of this question. (refer to Fig 64)
- Click on the "" icon button. Once you click on the "" icon button popup model will open and click on the "OK" button. To delete the question. (refer to Fig 65)
- Click on the "Save&Continue" and also, use the navigation button to move to the next page. (refer to Fig 62)

NPS Survey Builder			Warning Please Add At Least O	ne Question.	14464 7 4 4	×		 	2453.11G L75333		
Ò	√		1	Add Questions & Brandin		~))	1		1	
	Create Your Surv	ey Questions									
Aa	Text			Drag a question type from the left to	begin.				Preview		
	Text Area					^					^
A	Long Text Area										
Õ	URL										
\sim	Email										
:=	Picklist										
۲	Multiselect Picklist										
苗	Date										
	Date/Time										
#	Number										
%	Percentage										
企	File Upload										
1	Rating										

Figure 59: get a Warning message "Please Add At Least One Question"

	NPS Survey Builder NPS Survey Accounts ~	Contacts 🗸 Files 🗸 Survey Forms 🗸 Questions 🗸 Field Mappings 🗸 Responses	Score Levels 💛 🛛 Survey Distribut
		Create a textarea Question	Preview
^a	Text	* Question Label	
	Text Area		
	Long Text Area	Complete this field.	
0	URL	Help Text	
\leq	Email		
\equiv	Picklist	Do Not Score	
	Multiselect Picklist	* Correct Answer Score	
曲	Date		
*	Date/Time	* Correct Question When	
	Number	Select an Option 🔹	
	-	Answer Keyword	
%	Percentage		
£	File Upload		
*	Rating	Mark this question as required:	
ă	Currency		
1↓	Ranking	Add Question	
E.	NPS		
*	CSAT		

Figure 60: Select the data type to create a question

NPS Survey Builder			
Create Your Survey Questions Create Your Survey Questions Text Area Cong Text Area URL Email Email Exclude Multiselect Picklist Date Date/ Date Date/ Picklist Date File Upload A paire	Create a text Question * Cuestion Label * Cuestion Label * Cuestion Label * Cuestion Label * Do Not Score Mark this question as required: * Cuestion * Cue	Preview	

Figure 61: Select the data type to create a question

	CZHRANCET NY MUT DISSUCTION			C 118-71 (<i>111</i>		
	NPS Survey Builder	Create a text Question				
		* Question Label	1			
	✓ _> ✓	Full Name	\checkmark		\checkmark	
		Help Text				
	Create Your Survey Questions	Please Fill Your Full Name.				
		Do Not Score				
		* Correct Answer Score		Description		
Aa	Text	100		Preview		
	Text Area	* Correct Question When				^
	Long Text Area	Answered 👻				
0	URL	Answer Keyword				
	Email	Demo Name				
:=	Picklist					
0	Multiselect Picklist	Mark this question as required:				
一曲	Date					
	Date/Time	Add Question				
#	Number					
%	Percentage					
土	File Upload					
X	Rating					

Figure 62: To Save the question, click on the Add Question button

NPS	\supset		Q Search				*-	@ ? ♥ I	
	NPS Survey Builder	S Survey Accounts 🗸	Contacts 🗸 Files 🗸 Survey Forms	- 🗸 Questions 🗸 Field Mag	opings 🗸 Response 🗙	Score Levels 🗸	Survey Distributi	ons 🗸 More 1	- /
100-071							2005-01 (2 <i>11</i>		S.J.M.C.
6	NPS Survey Builder		Create a Text Question						
	and the second s		*Question Label				- Caracter		· · · · · · ·
	✓		Full Name			\checkmark		\checkmark	
			Help Text						(6))/
	Create Your Survey Quest	tions	Please Fill Your Full Name.						
			Do Not Score						
A.,	Toyt		* Correct Answer Score			Pr	review		
	Toxt Aroa		100						^
	Long Text Area	Full Name (Text	*Correct Question When						
2			Answered		•				
	Email		Answer Keyword						
	Picklist		Demo Answer						
	Multiselect Picklist		Mark this question as required:	Required					
前	Date								
前	Date/Time				Save				
#	Number								
%	Percentage								
· ↑ .	File Upload								
	Rating								

Figure 63: Click on the edit icon button to update questions

Cr	reate Your Survey Question	S		
A _{a Tex}	ext	Drag a question type from the left to begin.		Preview
Tex	ext Area	How satisfied are you with our service? $\ensuremath{(\mathrm{Text})}$	× 💼 Î	How satisfied are you with our service?* •
	RL			Rate your overall experience with our service. Your feedback helps us improve!
E Pic	cklist			
Da	ate			
Da Da	ate/Time umber			
% Pe	ercentage le Upload			
Ra	ating			
↑↓ Ra	anking			
CS	PS SAT			
organiz	205			

Figure 64: help text of the question

	NPS Survey B	Builder			S.2000 2020					
	\checkmark		~		~		~		~	
	Create Your Surv	ey Questions		Confirm Delete		_				
Aa	Text			Are you sure you want to delete this question?				Preview		
	Text Area		Full Name (Text							<u>^</u>
	Long Text Area			Cancel						
0	URL									
	Dicklist									
	Multiselect Picklist									
前	Date									
前	Date/Time									
#	Number									
%	Percentage									
企	File Upload									
*	Rating									

Figure 65: Click to delete the question

NF	NPS Survey Builder												
	~		1	Add Questions & Branding		~	<u>_</u>	\checkmark		~			
Custor	mize Form										O Preview		
Settings Design Opti	ons	Survey Configure y	Settings our survey preferences								Apply		
Question De Response M Score Levels	apping	All Questions I Make all survey	Required questions mandatory			Allowable Targ Select an O	et Objects ption				•		
Translations		👸 Timeline	2										
		Auto Close Date			ä	Auto Archive E	Date	Level 20 days after the	- 1		ä		

Figure 66: move to the next Customize form

Step 11: Customize the Survey Form

1. Survey Setting Tab

- Click on the "Save&Continue" without mapping questions with fields, then show an Error message for mapping questions with fields. (refer to Fig 67)
- In the Survey settings page if you want to make "All Questions Required" check the checkbox" or leave it as default. You can add "Auto Close Date" and "Auto Archive Date" but if "Auto Archive Date" is less than 30 days from "Auto Close Date". You will get a popup saying "Archive date must be at least 30 days from today". (refer to Fig 68)
- Select the value from "Quick Select Frequency" any option as per your business requirement of a "Weekly (7) days" then automatically set a value on "Survey Data Collection Frequency

(Days)" and "Number of Recurrences" will default value "2". You can add other values to that if you want based on "Quick Select Frequency". (refer to Fig 69)

• Click on the "**Apply**" button which is on the top-right corner of the page. To Save the Survey Setting. (refer to Fig 70)

	Error Field mapping is required before proceeding. Please map the response questions to the	e selected object fields in the Response Mapping section.	
Lustomize Form			Preview
ttings			
esign Options	Configure your survey preferences		Apply
Jestion Dependency			
sponse Mapping	All Questions Required Make all survey questions mandatory	Allowable Target Objects	
ore Levels		C036	
anslations	Timeline		
	Auto Close Date	Auto Archive Date	
	Date when survey will automatically close	Recommended: Set archive date at least 30 days after the last expected survey response	ä
organizer	Allowed Time to Respond (Days)		

Figure 67: Click Save and Continue button to move next page

		Q Search	★- 日 @ ? \$ 单 🗟
Design Options	Configure your survey preferences	Files V Survey Forms V Questions V	Field Mappings Responses Score Levels Survey Distributions More Appropriate Appropriate Appropri Appropri Appropriate Appropriate Appropriate Appropriate Appro
Question Dependency		Archive date must be at least 30 days from toda	y The second
Response Mapping	All Questions Required Make all survey questions mandatory		Allowable Target Objects
Score Levels	-		
Translations	Timeline		
	Auto Close Date		Auto Archive Date
	Feb 5, 2025		Feb 28, 2025
	 Date when survey will automatically close 		 Recommended: Set archive date at least 30 days after the last expected survey response
	Allowed Time to Respond (Days)		
	🔀 Recurrence		
arrantee	Survey Data Collection Frequency (Days)		Number of Recurrence

Figure 68: Save Auto Close and Auto Archive Date

Feb 5, 2025	苗	Mar 14, 2025	苗
Date when survey will automatically close		Recommended: Set archive date at least 30 days after the last expected survey response	
Allowed Time to Respond (Days) 15			
Recurrence ₹			
Survey Data Collection Frequency (Days)		Number of Recurrence	
7		2	
Suggested intervals: 7 (weekly), 30 (monthly), 90 (quarterly), 180 (semi-annual), 365 (annual)			
Quick Select Frequency			
Weekly (7 days)	•		
Back Cancel Save Sav	ve and	Continue	

Figure 69: Auto Select Survey Data collection Frequency based on Quick Select Frequency

NPS Survey	Builder	Success Survey settings saved successfully	Survey settings saved successfully ×						
1	1	Add Questions & Branding	~		1		1		
Customize Form	ı						Preview		
Settings	Survey Settings								
Design Options	Configure your survey preferences						Apply		
Question Dependency									
Response Mapping	All Questions Required Make all survey questions mandatory		Allowable	Target Objects					
Score Levels			Account				¥		
Translations	Timeline								
	Auto Close Date		Auto Archi	ive Date					
	Feb 28, 2025		Jun 19,	2025			i		

Figure 70: click on the Apply button to get the success message

2. Design Option Tab

 On the Design Options page, you can add a "Logo", "Header", "Footer", and "Background image" or "Background color" You can select only one of the two, and you can set questions "font color", "font-size", "font type", and "number of Questions per page" for the Customize form Click on to "Apply" button to save the design of the Survey form. (refer to Fig 71)

NPS Survey Build	Pr NPS Survey Accounts V Contacts V	Files \checkmark Survey Forms \checkmark Questions \checkmark Field Mappings \checkmark Responses \checkmark	Score Levels 🗸 Survey Distributions 🗸 More 🔻 🖋
Customize Form		Success X	Preview
Settings	😵 Design Options 🧼 Success	×	Apply
Design Options	Design and Customize Surv	928_are-you-a-nearth-professional-wave-rooter-phg.phg image Oploaded Successfully !!	
Question Dependency	Title Text Color	Success X	Title Font Size
Response Mapping	#000000	Georgia	24 💌
Score Levels			
Translations	Question Text Color	Question Font Type	Question Font Size
	#000000	Georgia 💌	18 💌
	Anguna Taut Color	Section Reviewand color	Number of Questions Per Dage
	#068004	→ #FDFDFD	5 V
	Background color	Background Image	Logo Image
() organizer	#E7E7	2 Upload Files Or drop files	Upload Files Or drop files 2101003.png ×

Figure 71: Click on the Appy button to save changes

3. Question Dependency

 On the Question Dependency page you can add many Rules by clicking on "Add New Rule" as per business requirements and you can add Source Questions with conditions for **Answers**, Select "**Target Questions**" and keep the default "**Active**" to apply for the Customize form Click on the "**Save Rule**" button. (refer To Fig 72)

NPS Survey Builder	NPS Survey Accounts V Contacts V	Q Search Files ✓ Survey Forms ✓ Que	stions 🗸 Field Mappings 🗸	Responses 🗸 Score Levels 🗸	★ 🔹 🖚 ? 🌣 🌲 🐻 Survey Distributions 🗸 More 🔻 🖌
Customize Form	I	Success Rule saved successfully.	×		Preview
Settings	Outrion Pronching Pulor				
Design Options					
Question Dependency	Rule Name				a
Response Mapping	Rule 1				
Score Levels	Source Question	Equals		Answer	
Translations	How satisfied are you with our service?	Equal	5 7	 Very Satisfied (Excellent set 	ervice v
	Target Question				
	How satisfied are you with our service?				•
	Active Active				Save Rule
	Add New Rule				

Figure 72: To Apply New Rule on Questions

4. Response Mapping

 On the Response Mapping page you can add a map to your Selection questions by selecting any object (case) and their fields like "Name", "Email Address" based on the business need for the Customize form Click on the "Save Mappings" button to save Response Mapping. (refer to Figure 73).

-				Q. Search							* - 6	• • ?	1\$1 .	6
NPS Survey Builde	NPS Survey	Accounts \checkmark	Contacts \checkmark	Files 🧹 Surv	vey Forms 🗸 🔾	v uestions \checkmark	Field Mappings	~ F	Responses 🗸	Score Levels 🤝	- Survey Distribu	tions 🗸 🕴	More 👻	/
Customize Form				Success Field Mapp	ings saved successfu	ullyt		×					Preview	
Settings Design Options	🔠 Survey	Form Mappi	ng											
Question Dependency	Select Object	د												-
Response Mapping	Case													-
Score Levels Translations	How satisfied	are you with o	ur service?						Sele	ct Field lame				•
	How satisfied	are you with o	ur service?						Sele	ct Field mail Address				-
					Page 1 of 1							Save Mappin	igs	Next
				Back	Cancel Sa	ve Save a	nd Continue							

Figure 73: Click on the Save Mappings button to save

5. Score Level

On the Score Levels page, you can add by clicking on the "+" Icon Score Levels and remove Score levels By Clicking on the "" Icon on the business needs the Customize form Click on the "Save" button to save the score level of the question. (refer to Fig 74)

Settings Design Options	Score Level	Success Score Levels Update Successfully	×		
Question Dependency		SCORE RANGE	SCORE LABEL	SCORE COLOR	ACTION
Response Mapping Score Levels	20	<= Survey Score < 40	High	#DD1515	â
Translations	40	<= Survey Score < 70	Medium	#DADA18	â
	70	<- Survey Score <- 100	Low	* 07833B	☆ +
		Car	Save		

Figure 74: Click on the Save button to save the score level

6. Preview Icon

 Click on the Preview "[®]" Icon to view the survey, customize the form and if you want to add any changes, you can modify it Click on the close button icon to close the model. (refer to Fig 75)

	Q. Search	主 🗄 🚓 ? 🍕 🔀 🐻
	Form Preview	
N	NPS	
	Service Satisfaction St	irvey
Custo		•
Settings Design Op Question D Response M		
Score Leve	How satisfied are you with our service? $_{\textcircled{0}}$	
Translation		Close
	Auto Close Date	Auto Archive Date
	Feb 5, 2025	Mar 14, 2025
organizer	Date when survey will automatically close	Recommended: Set archive date at least 30 days after the last expected survey response

Figure 75: Click on the preview icon to customize the form

7. Save and Continue

 Click on the "Save and Continue" and also, use the navigation button, and move next to the "Customize Form" page (refer to Figure 72).

Thank You Message Customize Your Thank You Page	
Default! Thank You Page	
Message Heading	
Viessage Salesforce Sams I Image: Salesforce Sams Image: Salesforce Sams Imad	
Bath Canal 5	ave Save and Continue

Figure 76: Click on the Save and Continue button

Step 12: Thank You Page

• On the Thank page, you add a Message Heading like "Thank for your time" and a Message like "Thank you for your feedback! We appreciate your time and will use it to serve you better." as per your business need. You can see the customized message page right side

Click the "Save" or "Save and Continue" button (refer to Figure 77).

• Click on the "Save and Continue" button, and move next to the "Delivery and Deployment Setting" page. (refer to Fig 78)

	✓		1		✓		• Thank you & Ree	direct Settings	>	1		1	
=0	Thank You Messa Customize Your Thank Yo	ige ou Page											
		D	efault! Thank You Pag	e				THANK					
Me	ssage Heading							THANK	rou fe		JR FEEDBAC	. K.	
Th	ank you for your feedback.							Thank You for	your valuat	ole time. W	/e appreciate your t	ime.	
Me	ssage												
T	anestorce sans 🔹 12	time. We appreciate	your time.	· * = * = (= =									
					Pack Cancel	Sava	Save and Cont	tique					

Figure 77: To add Message Heading and Message

	√		1		1	All a	✓	Delivery & Deployment Settings	~	A A
=	Survey Distribution Manage and track your su	rvey distribution	lent							
Ø	Share Survey									
htt	ps://force-momentum-23	66-dev-ed.scratch.	my.site.com/s/?surve	vFormId=a06Rt00000	EjwXdIAJ					đ
2.	Distribution Char	nels		Email	1		لِلللَّالِ QR Coo	ie		
					Back	Cancel Save and G	Continue			

Figure 78: Click on the Save and Continue button

Step 13: Delivery and Deployment Setting

- On the Survey Distribution & Development page, you can See the Distribution Channels "Email" or "QR Code". You can select based on your need." when you select "Email" get the option to select any number of "Recipients" with their "Name", "Customer Email" and "Company Info" by checking on the checkbox (refer to Figure 79).
- Select "**Email Template**" from the picklist to send through Email. (refer to Fig 80)
- Once you select the Email template like "NPS Survey" the popup will open. You can modify the Email Template based on your business needs if you click on the "Cancel" or cross "X" icon button your changes will not save. (refer to Fig 81)
- The "NPS Survey" Email Template is used to gather customer feedback on the implementation process, measure satisfaction, and identify areas for improvement with the help of the Survey form link. (refer to Fig 82)
- In the "Survey Archive Completion" Email Template, the survey responses have been successfully archived, and you can review the details or contact your admin if needed. (refer to Fig 83)
- Once you have made any changes, click on the "Save Template". You will get a popup saying "Template Saved Successfully". (refer to Fig 84)

- After the Save Email template, You can Select the Distribution type "Send Now" or "Schedule" Based on your business needs if you want to schedule send the survey form, click on the "Send Survey" button. (refer To Fig 85)
- If you can send the survey form by selecting "Schedule", click on the "Send Survey" button. (refer to Fig 86)
- Once click on the "Send Survey" button. You will get a popup saying, "Survey Distribution initiated Successfully." Move next to the "Result" Tab (refer to Fig 87)
- If click on the "Back" button, you will see the Distribution History table with the Distribution Name, Channel, Status, Scheduled Date, and Completion Rate. (refer to Fig 88)
- Again Click on "Save and Continue" and also, use the navigation button, move next to the "Result" tab, you can see Response Report Details "Total Responses", "Response Rate", "Score Rate", "Daily Responses", and "Cumulative Responses" in the chart. (refer to Fig 89)

🛃 Distributio	on Channels						
			Email	Code Code			
Recipients SELECTED CONTAC Records per page 10 per page	TS: 1	•]				
	Name		Customer Email		Company Info	^	
	Ankit Sinha		ankit.appycrown@gmail.com		Ankit		
	Carole White		info@salesforce.com		Global Media		
	Deepak Singh		deepak.appycrown@gmail.com		Test Account		
	Edward Stamos		info@salesforce.com		Acme		
organizer	Geoff Minor		info@salesforce.com		Global Media		

Figure 79: Select the Distribution channel and Recipients

https://appycrownprivatelimited-dc-dev-ed.develop.my.sit	e.com/nps1?surveyFormId=a07WU00000Hs2d2YAB		3
Distribution Channels			
	Email	្ជីញៀ QR Code	
> Recipients			
Customization Email Template Select an Option NPS Survey Survey_Archive_Completion			

Figure 80: Select the Email template and the model will open

	Q Search	Ð 4	<u>ه ? ۲</u>	x 🔶	0
Survey Builder		ibutions	√ Мо	re 🔻	1
	Edit Email Template				
bution Channe					
	*Subject				
	We Value Your Feedback – Share Your Thoughts!				
	*Email Body				
	Salesforce Sans \blacksquare				
ints	Hi (/Contact Name),				
	Congraduations on completing the implementation phase of our Onecocal partnership, we are so excited to see your obsiness grow on our platorim. We strive to provide our merchants with the best possible experience, and we'll how to hear your feedback on our implementation process update.				
nization	Please take a few moments to complete this survey and let us know if our team meets your expectations. Thank you in advance for your valuable insights. Your input will help us continue to improve and ensure we meet your peeds to.				
plate	Thank you,				
rvey	Marco Kocchetti Implementation Team Lead - OneLocal				
	Please do not forward this email as its survey link is unique to you.				
1-	n you no longer wan to receive unse emails, unsubscribe rere.				
ne					
	Cancel Save Template			Send Su	urvey
	Back Cancel Save and Continue				

Figure 81: To make changes to the Email template

	Q. Search	8	? 🌣	÷ 💿
Survey Builder		ributions	✓ More	- /
	Edit Email Template			
bution Channe				
	*Subject			
	We Value Your Feedback - Share Your Thoughts!			
	* Email Body			
	Salesforce Sans Image: Salesforce S			
ents	Hi (¦Contact.Name),			
	Congratulations on completing the Implementation phase of our OneLocal partnership. We are so excited to see your business grow on our platform. We strive to provide our merchants with the best possible experience, and we'd love to hear your feedback on our (Implementation process undate.			
nization	Please take a few moments to complete this survey and let us know if our team meets your expectations.			
1	Thank you in advance for your valuable insights. Your input will help us continue to improve and ensure we meet your needs to. Thank you,			
Diate	Marco Rocchetti			
	Implementation team tead - onecocal Please do not forward this email as its survey link is unique to you.			
	If you no longer wish to receive these emails, unsubscribe here.			
ıle				
	Cancel Save Template			nd Suprav
			> 56	nd Survey
	Territ Desire Desirement			
	Back Cancel Save and Continue			

Figure 82: To used to send the survey form link

	Q. Search	X	84? 🕈 🖡 🐻
NPS Survey Builder	Edit Email Template	lit	utions 🗸 More 🔻 🖋
	*Subject		
	survey Archive Completion: [:survey_bistribution_c.name] - (:kecordsProcessed) kecords Processed *Email Body		
> Recipients	$\begin{tabular}{ c c c c c c c c c c c c c c c c c c c$		
✓ Customization	Survey Archive Complete	i l	
Email Template Survey Archive Completion	The survey arrive process has been completed successfully. Below are the details of the operation: Distribution (D: (Distribution(d) Becords Processed: Hecords brocessed)		
N. Calculate	Completion Time (INOWI) Satus: -/ Successfully Completed All selected survey responses have been successfully archived in the system.		
> schedule	View Distribution Record If you have any questions or concerns, please contact your system administrator.	-	Send Survey
		Cancel Save Template	
Distribution History			
Distribution Name	✓ Channel ✓ Status ✓ Scheduled Da	te 🗸 Completion Ra	te 🗸 🗸

Figure 83: To be used to send the email that Survey Archive Completed.

*	Q Search		*- 🖬 🗠 ? 🌣 🐥 🐻
NPS Survey Builder NPS Survey Account	ts \lor Contacts \lor Files \lor Survey Forms \lor Q	uestions \lor Field Mappings \lor Responses \lor So	core Levels 🗸 Survey Distributions 🗸 More 🔻 💉
https://cx360test.my.site.com/s/?surveyFormId=a05fJ0000	002vUWgQAM Success Template saved successfully	×	Ø
Distribution Channels			
		ŪIŪ	
	Email	QR Code	
> Recipients			
✓ Customization			
Email Template NPS Survey	Edit Template		
· · ·			
> Schedule			
armanizer			➤ Send Survey

Figure 84: Click on the Save Template button

	Email	CUIL) QR Code	
> Recipients			
✓ Customization			
Email Template NPS Survey	▼ Edit Template		
✓ Schedule			
Distribution Type Send Now Schedule			
			► Send Survey

Figure 85: Click on the Send Survey button by selecting Distribution Type of Send Now

> Recipients	
✓ Customization	
Email Template	
NPS Survey V Edit Template	
✓ Schedule	
Distribution Type	
Sond New Schedule	
Schedule Date/Time	
*Date *Time	
Feb 6, 2025 🛗 2:15 PM 🕥	
	Send Survey
n organizer	

Figure 86: Click on the Send Survey button by selecting Distribution Type of Schedule

88 Array.prototype.filte M	Array.prototype.forE INT Plagiarism Checker	🕨 lightning-combobo 🛛 🚳 Business Admir	nistra 🔞 The Essentials of W 🛆	Google Cloud Skills 🧲 Approval Pro	cess ex » 🗅 All Bookman
		Q Search			*- 🖬 🗠 ? 🌣 🐥 🔭
NPS Survey Builder	NPS Survey Accounts ~ Contacts ~	- Files - Survey Forms - Qu	estions $$ Field Mappings $$	Responses \checkmark Score Levels \checkmark	Survey Distributions 🗸 More 🔻 🖋
1.0	Daily Unique Contacts	Success Survey distribution initiated succ	essfully	Cumulative Contacts	
Munder of Lings of Control of Con			4008 4000 4000 4000 4000 4000 4000 4000		
	Response Date		0	Response Date	
Recent Responses					
Customer Name	Survey Type	Average Score (%)	Latest Respo	onse Date	Response
armanizor		Pack	Cancel		

Figure 87: after clicking on the Send Survey button, get a popup

		Email			QR Code			
> Recipients								
> Customization								
> Schedule								
Distribution History								► Send Survey
Distribution Name	√ Chann	el 🗸 🗸	Status	~	Scheduled Date	~	Completion Rate	~
SD-0265	email		Scheduled		2025-02-06T07:58:28.000Z			
			Back Cancel	Save and Continue				

Figure 88: after clicking on the back button to see the Distribution History.

Survey Report & Details					
AL RESPONSES		RESPONSE RATE		score rate 35.6%	
Daily Responses			Cumulative Responses		
	Daily Contact Distribution			Cumulative Contact Growth	
10	Daily Unique Contacts		10	Cumulative Contacts	
0.9			0.9		
0.7			20.0 20.0		
0.5			0.6 9.0.6		
0.4			E 0.4 g 0.3		
0.2			0.1		
0	2/13/2025		0		
	Response Date		2710/2020	Response Date	

Figure 89: click on the Save and Continue button to see the Response Report.

Step 14: Send Email and Fill Survey Form

- Once click on the "Send Survey" button. You will get a survey mail with link of the Survey form. (refer to Fig 90)
 Note:- If not get mail in inbox. Please check "Spam" once.
- Go to the mailbox open mail, and click on the "Click here to take the survey" button. You will be redirected to the survey form. (refer to Fig 91)
- Once Fill in all responses, then click on the "**Submit**" button to submit the responses.

(refer to Fig 92)

 Once click on the "Submit" button. You will get a popup saying, "Survey Sumited Successfully." It will redirect to the "Thank You Message" page. (refer to Fig 93)

Hi Ankit Sinha,
Congratulations on completing the Implementation phase of our OneLocal partnership. We are so excited to see your business grow on our platform.
We strive to provide our merchants with the best possible experience, and we'd love to hear your feedback on our Implementation process update.
Please take a few moments to complete this survey and let us know if our team meets your expectations.
Please complete the survey before 2/11/2025.
Click here to take the survey
Thank you in advance for your valuable insights. Your input will help us continue to improve and ensure we meet your needs.
Thank you,
Marco Rocchetti
Implementation Team Lead - OneLocal
Please do not forward this email as its survey link is unique to you.
If you no longer wish to receive these emails, unsubscribe here.

Figure 90: after clicking on the save survey button, the Survey emails sent with the

Service Satisfaction Survey	
How satisfied are you with our service?*	
How satisfied are you with our service?	

Figure 91: Open the mailbox and click on the button to open the survey form

Figure 92: Attend all questions and click to submit button

THANK	FOP	VOUD	TIME

We are happy to connect with you

Figure 93: Click on the submit button and move to thank you page

Step 15: Result

- Go to Salesforce, and Again the "Result" tab, Scroll down you will see Recent Responses below in the table "Customer Name", "Survey Type", "Average Score", "Latest Response Date", and "Response" (refer to Figure 94).
- Now Click any "Response", You will see all responses for Questions with Answers (refer to Figure 95)
- Then, the Response page is open where you can see, all responses submitted by the user, **score**, **score** label, and **score** color. (refer to Figure 95)
- Click on the "File" icon to view the uploaded files. (refer to Figure 96)

Response Report Survey Report & Details			
total responses O	RESPONSE RATE		score rate %
Daily Responses		Cumulative Responses	
Daily Contact I	Distribution	10 09 508 07 07 06 06 06 07 07 07 07 07 07 07 07 07 07 07 07 07	Cumulative Contacts
Res	oonse Date	0	Response Date

Figure 94: click on the Save and Continue button to see the Response Report.

-				Q Searc	h]		*- 🗄 🐟	?‡	. (5)
NPS Survey Builder	NPS Survey	Accounts 🗸	Contacts 💊	r Files ∨	Survey Forr	ns 🗸 Questions	 Field Mappir 	ngs 🗸 Responses 🗸	Score Levels 🗸	Survey Distributions	🗸 More 🔻	, det
🗉 Contact Response Deta	ails											
🖽 Responses for Ankit Sinh	a											
QUESTION	FIELD NAM	E AN	SWER		SCOF	RE(%) SCORE	LABEL	SCORE COL	LOR	FILES		
Test CSAT with Score	masterrecore	did 6			0.009	6 N/A		N/A				
Tast CES with Sears	lastnama	N	autral		0.000	< N/A		N/A				
lest CES with Score.	lastilaille	The	rutai		0.007	0 N/A		N/A				
Test CES without Score.	otherstreet	Ea	sy		75.00	% N/A		N/A				
Test NPS with Score	birthdate	9			100.0	0% High						
Test NPS without Score.	othercity	4			0.009	6 N/A		N/A				
1/4		2			N/A			N/A				
N/A	salutation	3			N/A	N/A		N/A				
Test CSAT without Score.	accountid	6			55.56	% N/A		N/A				
				Г	iauro 0	5. dick on	the recence	nce hutton to c	na contac	t recoonce De	taile	
				1	igure 9	J. <i>CHCK ON</i>	ine respo	<i>nse oution to s</i>		i response De	10115.	
Test Number	OtherCity	50				100.00%	High					
Test Percentage	OtherLongitude	50				100.00%	High					
Test File Holes d												
rest rife Upioad	UtherLongitude	N/A				N/A	N/A	N/A				
Test Rating Heart	MailingStreet	8				0.00%	N/A	N/A				
Test Rating Star	OtherAddress	10				0.00%	N/A	N/A				
Test Rating Number	MailingCity	8				100.00%	High					

Figure 96: click on the response button to see contact response Details.

Step 16: Edit, Clone, Share, and Delete Survey Form

- Click on the "**Select Existing**" button, You will be redirected to the Survey forms table (refer to Figures 97 and 98).
- In the Survey Forms Table Select your form, and if you don't find your form click on the "Next" or "Previous" button and select your form. Click on the right-corner "▼" icon, and you will see the buttons "Edit", "Delete", "Share", and "Clone"

(refer to Figure 99).

- If you are on "Edit" you will be redirected to the NPS Survey Builder page (refer to Figure 100).
- Click on the "**Delete**" button, and click on the "**Ok**" to delete that survey. (refer to Figure 101).
- In Select Survey Form, Click on the "Share," button and you will be redirected to the "Delivery And Development Settings" tab (refer to Figure 101).
- In Select Survey Form, Click on the "Clone," button, You will get a popup saying "Survey Form Cloned Successfully." (refer to Figure 103).

NPS Survey Builder											
Create Survey Form	✓ ✓		1								
Name your new survey Survey Form Name	Description	About Survey Form	æ								
Select the type of survey you want to send											
Net Promoter Score	Customer Satisfaction Score (CSAT)	Customer Effort Score (CES)	Others								
1 2 3 4 5 6 7 8 9 10	★★☆	Very Difficult Difficult Neutral Easy Very Easy	🎔 ★ 😊 🛈								
	Create New Select Existing										

Figure 97: click on the select Existing.

n Survey Forms								Create New
Name	\sim	Description \lor	Category	~	Object Name	\sim	Duplicate	~
test data								•
test data								
testing data								•
Test on 03 Feb					Account			•
Test For the Header		Test Description						
Test User					Case		Yes	•
hjb								•
Service Satisfaction Survey		The Service Satisfaction Survey helps busines	others		Case		Yes	
Test By Ankit - Clone test		Test Description.	CES		Case		Yes	•
Previous				Page 4 of 4				Next

Figure 98: click on the Select Existing button to move to the Survey Forms Table.

🕫 Survey Forms							Create	New
Name	✓ Description	 Category 	~	Object Name	~	Duplicate	~	
test data								•
test data								•
testing data								9
Test on 03 Feb				Account			Edit	
Test For the Header	Test Description						Delete	
Test User				Case		Yes	Share	
hjb				Case		Yes	Clone	
Service Satisfaction Survey	The Service Satisfaction Survey helps busines.	others		Case		Yes		•
Test By Ankit - Clone test	Test Description.	CES		Case		Yes		•
Previous			Page 4 of 4					Next



NPS Survey Builder										
Create Survey Form	✓ ✓									
Name your new survey Test Survey Form	Description	Test Survey Description	æ							
Select the type of survey you want to send										
Net Promoter Score	Customer Satisfaction Score (CSAT)	Customer Effort Score (CES)	Others							
1 2 3 4 5 6 7 8 9 10	★★☆	Very Difficult Neutral Easy Leay	🎔 ★ 😊 🛈							
Update Create New Select Existing										

Figure 100: Click on the Edit button to redirect to NPS Survey Builder.

Survey Forms							Create New
Name	✓ Description	✓ Category	~	Object Name	~	Duplicate	~
test data							•
test data							
testing data		Cor	firm Delete				
Test on 03 Feb							
Test For the Header	Test Description	Are you sure you want to delete this survey t	orm?				•
Test User			orel OK			Yes	
hjb						Yes	•
Service Satisfaction Survey	The Service Satisfactio	n Survey helps busines others		Case		Yes	
Test By Ankit - Clone test	Test Description.	CES		Case		Yes	
Service Satisfaction Survey - Clone	The Service Satisfactio	n Survey helps busines others		Case		Yes	
Previous			Page 4 of 4				

Figure 101: Click on the delete button will get the popup.

	✓		√		✓	A		Delivery & Deploy	ment Settings	√	
=	Survey Distributio Manage and track your sur	on & Deploym	ent								
é	Share Survey										
htt	:ps://force-momentum-236	56-dev-ed.scratch.r	ny.site.com/s/?surve	eyFormId=a06Rt00000	EjwXdIAJ						ð
2.	Distribution Chan	nels									
				\sim	i		(III)				
				Email	I		QR Code	•			
-						_					
					Back Ca	ancel Save ar	nd Continue				

Figure 102: Click on the share button to redirect to the Delivery and Development

Setting tab

٠		Q Search			@?‡≢ 👼
NPS Survey Builder	NPS Survey Accounts 🗸 Cor	ntacts 🗸 Files 🗸 Survey Forms 🗸 Que	stions 🗸 Field Mappings 🗸 Responses	✓ Score Levels ✓ Survey Distribution:	s 🗸 More 🔻 💉
Survey Forms	117 - HNS-11 (- 7777-5883)	Survey Form cloned successfully	7 NNNNN 10007 - 119852111 - 249225 X	GUANNUUNNUC AN SACHHE	Create New
Name	✓ Description	✓ Category	✓ Object Name	✓ Duplicate	~
test data					
test data					
testing data					
Test on 03 Feb			Account		•
Test For the Header	Test Description				
Test User			Case	Yes	
hjb			Case	Yes	
Service Satisfaction Survey	The Service Satisfaction Su	vey helps busines others	Case	Yes	
Test By Ankit - Clone test	Test Description.	CES	Case	Yes	
Service Satisfaction Survey - Clone	The Service Satisfaction Su	vey helps busines others	Case	Yes	
Previous		Page 4	4 of 4		Next

Figure 103: Click on the clone button to make a Duplicate of Survey form.

Thank You