



# Configuring the VOC Survey Form

This document explains how to configure and send the VOC (Voice of Customer) Survey form by setting the sending condition in Salesforce Custom Settings.

## Overview

The VOC Survey is sent automatically when a record meets the condition defined in the "VOC Survey Condition" field of the Custom Setting. The VOC Survey works for the Case, Contact, and Opportunity objects, so you can trigger it from any of these based on the condition you define.

## Supported Objects

- **Case**
- **Contact**
- **Opportunity**

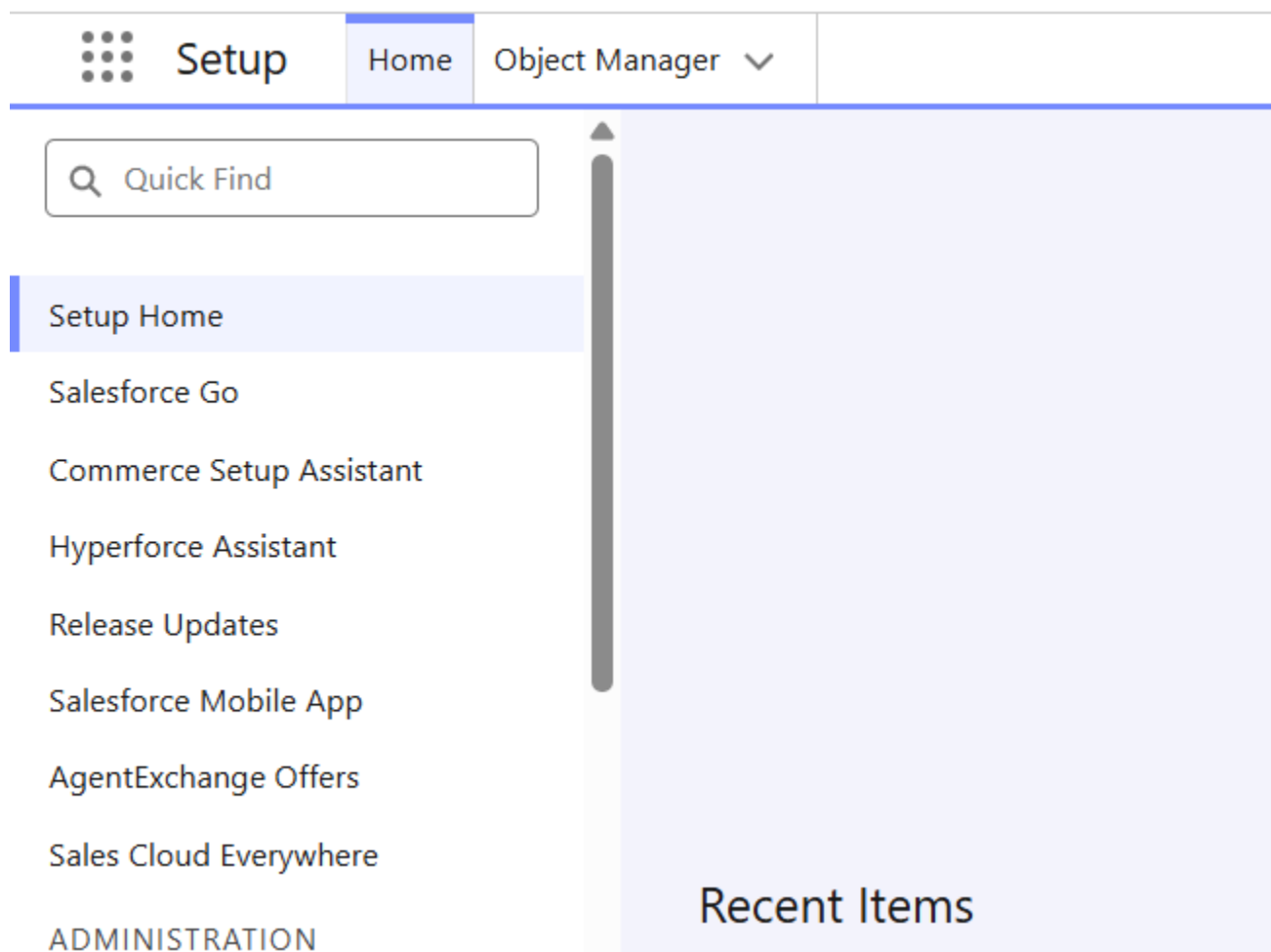
## Prerequisites

- Access to Salesforce Setup (System Administrator or equivalent permissions).
- Permission to view and manage Custom Settings.
- Knowledge of the field API names on the target object (Case, Contact, or Opportunity) that you want to use in the condition.

## Configuration Steps



1. Log in to Salesforce and click the gear icon, then select **Setup**.





2. In the Quick Find box, search for **Custom Settings** and open it.

 **Setup**

Home Object Manager ▾

 custom settin|

▾ Custom Code

Custom Settings

Didn't find what you're looking for? Try using Global Search.

 **SETUP**  
**Custom Settings**

## Custom Settings

Use custom settings to create and manage c  
repeated queries. Custom settings data can l

**View:** All ▾ [Create New View](#)

| Action                                                              | Label ↑                                |
|---------------------------------------------------------------------|----------------------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | <a href="#">Condition On Static Su</a> |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | <a href="#">Condition On VOC Sur</a>   |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | <a href="#">Send Condition Survey</a>  |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | <a href="#">Survey Distribution On</a> |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | <a href="#">Survey Distribution On</a> |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | <a href="#">SurveyFormPage</a>         |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | <a href="#">Trigger Toggle</a>         |



3. In the list of Custom Settings, search for **Condition On VOC Survey**.

 Setup

Home

Object Manager 

 custom setting

Custom Code

Custom Settings

Didn't find what you're looking for? Try using Global Search.

 SETUP

Custom Settings

## Custom Settings

Use custom settings to create and manage c  
repeated queries. Custom settings data can l

View: 

All 

[Create New View](#)

| Action                                                              | Label  |
|---------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | <a href="#">Condition On Static Su</a>                                                      |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | <a href="#">Condition On VOC Sur</a>                                                        |



4. Click **Manage** next to the Custom Setting.



SETUP

## Custom Settings

Custom Setting

### Condition On VOC Survey

If the custom setting is a list, click **New** to add a new set of data. For example, if your application

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level or just a general user.

Edit

Delete

#### ▼ Default Organization Level Value

Location

Saleshub

VOC Survey URL

[https://enterprise-saas-1574-dev-ed.scratch.my....](https://enterprise-saas-1574-dev-ed.scratch.my...)



5. Click **Edit** on the record you want to configure.



SETUP

## Custom Settings

### Condition On VOC Survey Edit

Provide values for the fields you created. This data is cached with the application.

#### Edit Condition On VOC Survey

Save

Cancel

#### Condition On VOC Survey Information

Location

Saleshub

VOC Survey Condition

VOC Survey URL



6. Enter your condition in the **VOC Survey Condition** field.



SETUP

## Custom Settings

### Condition On VOC Survey Edit

Provide values for the fields you created. This data is cached with the application.

#### Edit Condition On VOC Survey

Save

Cancel

#### Condition On VOC Survey Information

Location

Saleshub

VOC Survey Condition

Status = 'Closed'

VOC Survey URL

<https://enterprise-saas-1574>



7. Click **Save** to apply the configuration.

 **SETUP**  
**Custom Settings**

**Custom Setting**  
**Condition On VOC Survey**

If the custom setting is a list, click **New** to add a new set of data. For example, if your app

If the custom setting is a hierarchy, you can add data for the user, profile, or organization or just a general user.

[Edit](#) [Delete](#)

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▼ **Default Organization Level Value**

| Location       | Saleshub                                                                                                          |
|----------------|-------------------------------------------------------------------------------------------------------------------|
| VOC Survey URL | <a href="https://enterprise-saas-1574-dev-ed.scratch.my...">https://enterprise-saas-1574-dev-ed.scratch.my...</a> |

View: [All](#) [Create New View](#)

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Setup Owner ↑

## Example Conditions

Case object – send the survey when a Case is closed:

Status = 'Closed'

Opportunity object – send the survey when an Opportunity is won:

StageName = 'Closed Won'

With the condition in place, the VOC Survey form is sent whenever a record on the target object meets the defined condition.



# Notes and Best Practices

- Use the correct field API name for the object and enclose text values in single quotes (e.g., Status = 'Closed').
- Make sure the field used in the condition exists on the object you are targeting (Case, Contact, or Opportunity).
- Test the configuration in a sandbox before deploying to production: update a test record to meet the condition and confirm the survey is sent.
- If the survey is not sent, re-check the condition syntax and confirm the Custom Setting record was saved.