

NPS SURVEY CX OS

RELEASE NOTES

Experience evolution, new capabilities, and product enhancements



Version	2.4
Release Date	August 19, 2026
Prepared by	SalesHub, LLC



RELEASE OVERVIEW

1. Release Overview

Version 2.4 advances NPS Survey CX OS toward a more cohesive customer-experience operating experience inside Salesforce. The release combines visible UX improvements, expanded operational controls, and richer response intelligence with a clearer path for customers to understand business value, get started, and distinguish generally available capabilities from roadmap items.

Release theme

Build with less friction. Automate with more control. See customer feedback in context. Act from one connected experience.

A clearer survey journey A guided Builder experience brings setup, questions, design, deployment, and results into a more coherent flow.	Stronger operational control Automation, trigger visibility, email readiness, and access administration move toward centralized workspaces.	Deeper response intelligence The CX Command Center and Survey Response Analytics make it easier to move from top-line health to detailed response context.
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2. Release at a Glance

Capability	Classification	What changed	Primary value
CX Command Center	UPGRADED	Broader CX overview with NPS, CSAT, response rate, loop closure, trends, and follow-up visibility.	Faster visibility
Survey Builder	REDESIGNED	More structured guided journey across creation, configuration, branding, deployment, and results.	Easier configuration
Matrix Grid	NEW	Matrix-style question with row/column controls, display options, response rules, and validation.	Richer survey design
Automation Command Center	ENHANCED	Guided automation setup with initial-send timing, reminders, conditions, and review.	Controlled automation
Trigger Control Panel	NEW CONTROL	Central trigger visibility with Salesforce/app status and enable/disable controls.	Operational control
Survey Response Analytics	EXPANDED	Flexible filters, response summaries, account breakdowns, and dimensional views.	Deeper insights
Email Library	CENTRALIZED	Search, readiness, usage context, editing, and survey selection in one workspace.	Simpler content management
App Access Manager	NEW EXPERIENCE	In-app access, permission-set, user, and license-utilization management.	Simpler administration

Positioning note: capabilities that existed in earlier forms are described as redesigned, enhanced, upgraded, expanded, or centralized rather than being presented as entirely new.



VISUAL PRODUCT EVOLUTION

3. UI Evolution: Earlier Experience vs. Current Release

The release introduces visible experience changes in addition to functional enhancements. The comparisons below use historical SalesHub documentation as the “before” reference and August 2026 product documentation as the basis for the current-state experience.

How to read these comparisons

Historical panels are sourced from prior SalesHub documentation. Current-release panels are representative UI visualizations based on the documented August 2026 experience; final publication can replace them with exact demo-org captures if pixel-level parity is required.

The clearest areas of evolution are:

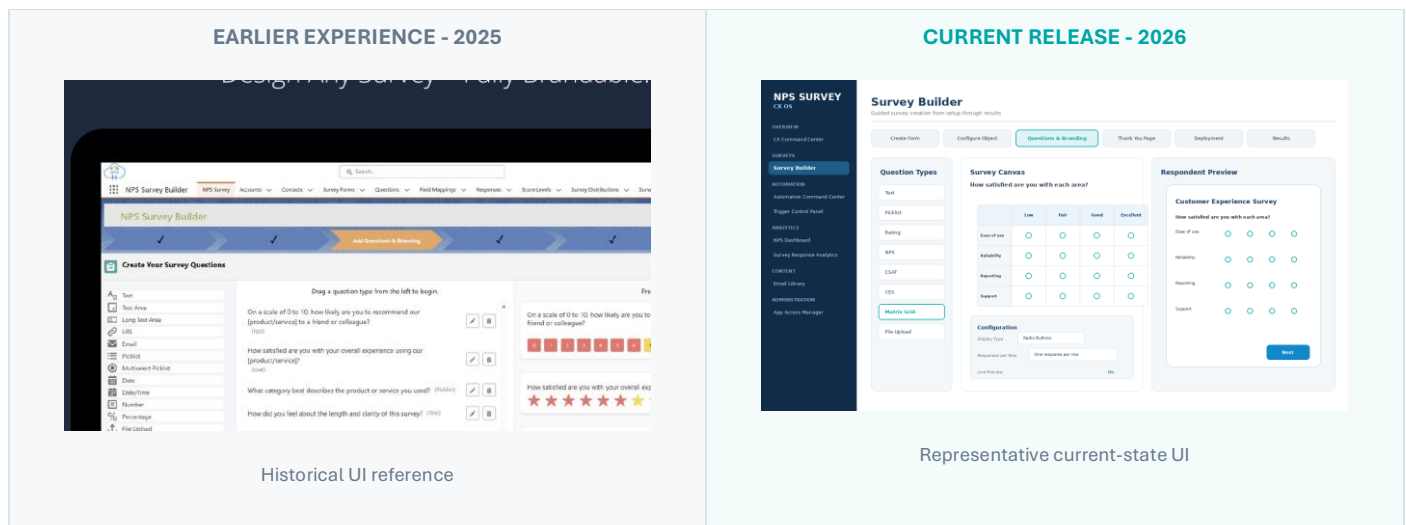
- Survey creation and configuration
- CX overview and response intelligence
- Application access administration
- Survey automation setup and reminders

Across these areas, the product direction is consistent: fewer disconnected setup paths, clearer context at the point of work, and stronger visibility across the survey lifecycle.



UI EVOLUTION 01

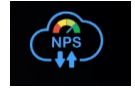
Survey Builder: from configuration screens to a guided survey journey



What changed

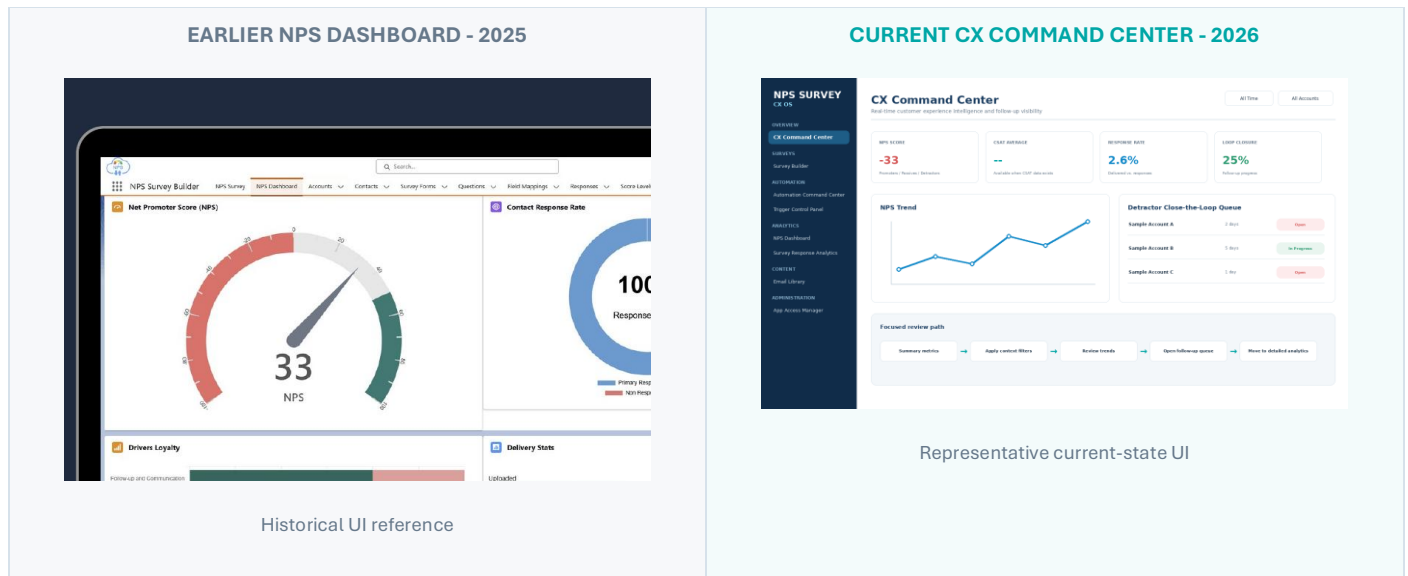
- Earlier versions used a wizard-style path with questions, customization, mapping, scoring, and deployment distributed across separate screens and configuration areas.
- The current experience organizes the journey into Create Form, Configure Object, Questions & Branding, Thank You Page, Deployment, and Results.
- Question configuration is supported by respondent preview and expanded controls, including the new Matrix Grid question type and its response-rule options.
- The result is a clearer path from survey idea to respondent-ready deployment while preserving advanced Salesforce-native configuration.

Historical reference: NPS Survey 2.0 AppExchange listing (2025). Current-state basis: NPS Survey CX OS Getting Started Guide (August 2026).



UI EVOLUTION 02

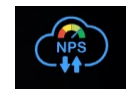
CX visibility: from NPS dashboarding to an operational command center



What changed

- The earlier dashboard centered on NPS score, response rate, Drivers of Loyalty, delivery statistics, and account/contact summaries.
- The CX Command Center broadens the starting view to NPS, CSAT, response rate, loop-closure progress, trends, and detractor follow-up context.
- Time-period and account filters help users focus the operational view before moving into deeper analytics.
- Survey Response Analytics complements the command center with From/To, Account, Contact, Response Type, and Survey Form filters plus account and dimensional summaries.

Historical reference: NPS Survey 2.0 AppExchange listing (2025). Current-state basis: NPS Survey CX OS Getting Started Guide (August 2026).



UI EVOLUTION 03

Access administration: from Salesforce Setup steps to in-app access management

EARLIER ADMINISTRATION - FEB 2026

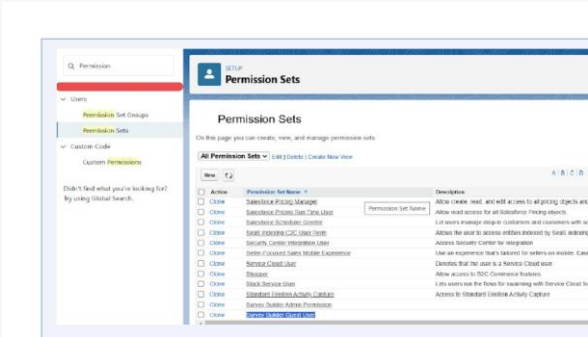


Figure 32: Search Permission Set

2. Click on "Manage Assignments"

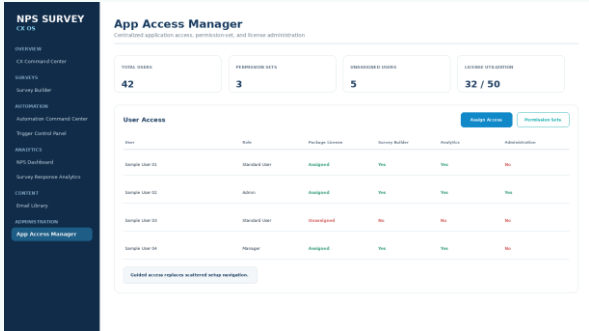


[Figure 33: Manage Assignments]

Figure 33: Manage Assignments

Historical UI reference

CURRENT APP ACCESS MANAGER - 2026



Representative current-state UI

What changed

- Previous administration relied on Salesforce Setup navigation through Permission Sets, Manage Assignments, Add Assignment, user selection, package licenses, and separate dashboard permission steps.
- App Access Manager brings user counts, permission-set context, unassigned users, and license utilization into one application workspace.
- Guided Assign Access and permission-set management reduce the need to move between multiple Setup screens for routine access administration.
- The experience makes access status easier to review before changes are made.

Historical reference: NPS Survey Builder Installation & Configuration Guide v1.0 (February 2026). Current-state basis: NPS Survey CX OS Getting Started Guide (August 2026).



UI EVOLUTION 04

Automation: from a single configuration form to a guided workflow

EARLIER AUTOMATION - FEB 2026

Historical UI reference

CURRENT AUTOMATION EXPERIENCE - 2026

Representative current-state UI

What changed

- The February 2026 guide already included an Automation Command Center with Basic Information, Visual Query Builder, and Generated Condition Logic.
- The current experience evolves that capability into a guided flow covering Basic Info, Survey Setup, Reminders, Conditions, and Review & Save.
- Initial delivery can be configured as Instant Send or Scheduled Send, while reminder behavior is managed independently through reminder limit, template, mode, and recurring schedule.
- This evolution improves configuration clarity while preserving condition-based Salesforce automation.

Historical reference: NPS Survey Builder User Guide v1.0 (February 2026). Current-state basis: NPS Survey CX OS Getting Started Guide and Configuration Resource Pack (August 2026).



CAPABILITY DETAIL

4. New and Enhanced Capabilities

The release combines net-new capabilities with meaningful experience upgrades. The distinction below reflects the historical product documentation reviewed for this release note.

Matrix Grid NEW CAPABILITY Evaluate multiple related rows against shared columns using Radio Buttons, Checkboxes, or Selectable Cells. Configure one, multiple, or up-to-N responses per row and control column reuse. Customer value: Supports compact ratings, prioritization, allocation, and structured multi-item feedback.	Trigger Control Panel NEW CENTRALIZED CONTROL Review trigger name, Salesforce object, Salesforce-side status, application status, filters, and supported enable/disable controls from one workspace. Customer value: Makes automation dependencies easier to review and administer.
Survey Response Analytics EXPANDED EXPERIENCE Explore response populations using date, Account, Contact, Response Type, and Survey Form filters. Review summary metrics, account breakdowns, and dimensional views. Customer value: Moves users from response counts toward contextual analysis.	Email Library CENTRALIZED EXPERIENCE Search Salesforce email templates, review readiness and usage states, edit supported templates, and connect an appropriate template to a survey. Customer value: Improves template discoverability and reuse.
CX Command Center UPGRADED EXPERIENCE Provides an operational starting point for NPS, CSAT, response rate, loop closure, trend context, and detractor follow-up. Customer value: Speeds up daily CX review and follow-up prioritization.	Survey Builder REDESIGNED EXPERIENCE Provides a more structured creation journey with question configuration, live preview, response mapping, settings, dependencies, score levels, translations, design controls, and deployment. Customer value: Reduces navigation friction across the survey lifecycle.
Automation Command Center ENHANCED CAPABILITY Extends the prior automation model with guided survey setup, initial-send options, reminder controls, conditions, matching-record review, and configuration status. Customer value: Makes recurring and event-driven survey delivery easier to govern.	App Access Manager NEW ADMIN EXPERIENCE Centralizes user access, permission-set context, unassigned-user visibility, and package license utilization. Customer value: Simplifies routine application administration.



BUSINESS VALUE

5. Business Benefits by Major Capability

Each major capability is designed to translate product functionality into a practical business outcome for CX leaders, Salesforce administrators, and survey program owners.

Capability	Business benefit	Business outcome
CX Command Center	Brings key CX health and follow-up signals into one starting point.	Faster prioritization of customer risk, engagement, and follow-up activity.
Survey Builder	Creates a clearer path from survey setup through deployment and results.	Helps teams configure surveys with less navigation friction and greater consistency.
Matrix Grid	Captures multiple related evaluations within one structured question.	Enables richer feedback while helping keep surveys compact and easier for respondents to complete.
Automation Command Center	Centralizes survey timing, conditions, reminders, and configuration status.	Supports consistent outreach and reduces reliance on manual survey-delivery administration.
Trigger Control Panel	Makes trigger state and application-level control easier to review.	Improves operational confidence before changing automated survey behavior.
Survey Response Analytics	Combines flexible filtering with response, account, and dimensional analysis.	Helps teams move from raw responses to focused customer and trend insights.
Email Library	Centralizes survey-related templates, readiness indicators, and reuse.	Improves content consistency and makes survey communications easier to manage.
App Access Manager	Brings access, permission-set context, unassigned users, and license utilization into one workspace.	Simplifies routine administration and improves visibility into application access.

Business benefit statements describe the intended operational value of the released capabilities and do not represent quantified performance guarantees.

EXPERIENCE IMPROVEMENTS

6. Additional Improvements

- Expanded survey design and branding controls covering colors, fonts, backgrounds, logos, header/footer imagery, and respondent preview.
- Enhanced Thank You Page configuration with editable heading, message content, formatting, and live preview.
- Improved deployment flow with clearer recipient selection and Send Now / Schedule controls for email delivery.
- Improved visibility into survey-level results and recent response activity within the Builder journey.
- Centralized navigation across overview, surveys, automation, analytics, content, administration, and documentation areas.



7. What Customers Should Expect

Existing survey concepts remain familiar	NPS, CSAT, CES, question dependencies, response mapping, score levels, branding, email/QR deployment, and Salesforce-native response handling continue to form the foundation of the experience.
Some workflows are re-presented	Capabilities such as automation and analytics existed previously, but the release organizes them into more guided or centralized experiences.
Access still depends on configuration	Feature availability can vary by organization configuration, assigned permission sets, package licensing, and enabled controls.



ADOPTION

8. Getting Started

For customers upgrading to this release, the recommended starting path is intentionally simple: confirm access, orient users to the new experience, then validate survey, automation, and analytics workflows in the organization.

Step	Start here	Recommended action
01	Confirm application access	Use App Access Manager to review user access, permission-set context, and available licenses before rollout.
02	Open the CX Command Center	Use the command center as the starting point to review NPS, CSAT, response rate, loop closure, trends, and follow-up context.
03	Review or create a survey	Open Survey Builder, confirm questions and branching, review branding and Thank You Page settings, and preview the respondent experience.
04	Configure delivery and automation	Validate recipients, Email Library templates, Send Now / Schedule choices, automation conditions, reminders, and trigger status as applicable.
05	Validate responses and analytics	Submit a test response, verify response capture, and confirm Survey Response Analytics and relevant follow-up behavior before broader use.

Recommended rollout approach

Validate the experience in a sandbox or controlled test population first, then move to broader production use after access, delivery, response capture, and follow-up behavior are confirmed.



9. GA vs. Roadmap

This release note separates generally available capabilities from roadmap items so customers can distinguish what is available for current use from what remains planned or in development.

Generally Available (GA) in Version 2.4

GA capability	Availability	Release significance
CX Command Center	GA	Upgraded CX overview and follow-up experience.
Survey Builder	GA	Redesigned guided survey-creation journey.
Matrix Grid	GA	New structured matrix-style question capability.
Automation Command Center	GA	Enhanced survey automation and reminder controls.
Trigger Control Panel	GA	Central trigger visibility and supported application controls.
Survey Response Analytics	GA	Expanded filtering, summaries, and response analysis.
Email Library	GA	Centralized survey email-template management.
App Access Manager	GA	Guided application access and license administration.

Roadmap / Planned Capabilities

The following items are not part of the generally available Version 2.4 capability set and should not be positioned as currently available functionality.

Roadmap capability	Current status
Digital Workers	In development; not currently available to users.
Active Surveys	In development; not currently available to users.
Survey Response Tracker Dashboard	Planned analytics capability; not included in this release.
Platform Roadmap	Upcoming navigation capability; not currently available to users.



10. Documentation and Support Resources

This release is supported by customer-facing documentation designed to make onboarding, configuration, troubleshooting, and adoption easier.

Getting Started Guide	Visual platform walkthrough covering navigation, Survey Builder, automation, analytics, Email Library, App Access Manager, and practical survey scenarios.
Configuration Resource Pack	Administrator and implementation reference for installation, permissions, survey configuration, automation, triggers, response storage, reporting, testing, and troubleshooting.
Frequently Asked Questions	Common usage, access, configuration, and troubleshooting guidance for customers and administrators.

11. Source Basis for UI Evolution

The comparison language in this release note was grounded in SalesHub product documentation rather than treating every 2026 capability as net-new.

- NPS Survey 2.0 - AppExchange Listing (2025): historical Survey Builder, distribution, response management, dashboarding, branding, and Close-the-Loop references.
- NPS Survey Builder User Guide v1.0 (February 2026): pre-release survey workflow, Results experience, Automation Command Center, and CX 360 dashboard references.
- NPS Survey Builder Installation & Configuration Guide v1.0 (February 2026): pre-release Experience Site, permission-set, package-license, and access-administration workflow references.
- NPS Survey CX OS Getting Started Guide (August 2026): current documented navigation, CX Command Center, Survey Builder, automation, analytics, Email Library, and App Access Manager experience.
- NPS Survey CX OS Configuration Resource Pack (August 2026): current configuration behavior for automation, triggers, responses, reporting, access, testing, and go-live.

Release note scope

This document summarizes capabilities included in the current NPS Survey CX OS release. Feature availability may depend on organization configuration and assigned access. Representative current-state UI panels are intended for release communication and should be replaced by exact demo-org captures when formal screenshot evidence is required.

SalesHub, LLC

NPS Survey CX OS | Customer experience, automation, and action in Salesforce