

NPS Survey Builder Application

Introduction:

1. Document Purpose

The Installation Guide aims to explain how to install the **NPS Survey Builder**. The document contains detailed information and images for better understanding.

NPS Survey Builder App Installation Guide

Step 1: Install the NPS Survey Builder Application

- Log in with your **Salesforce Org.** (refer to Figure 1)
- Choose a **profile** for package installation and click on the “**Install**” button to install the **NPS Survey Builder** Package. (refer to Figure 2)

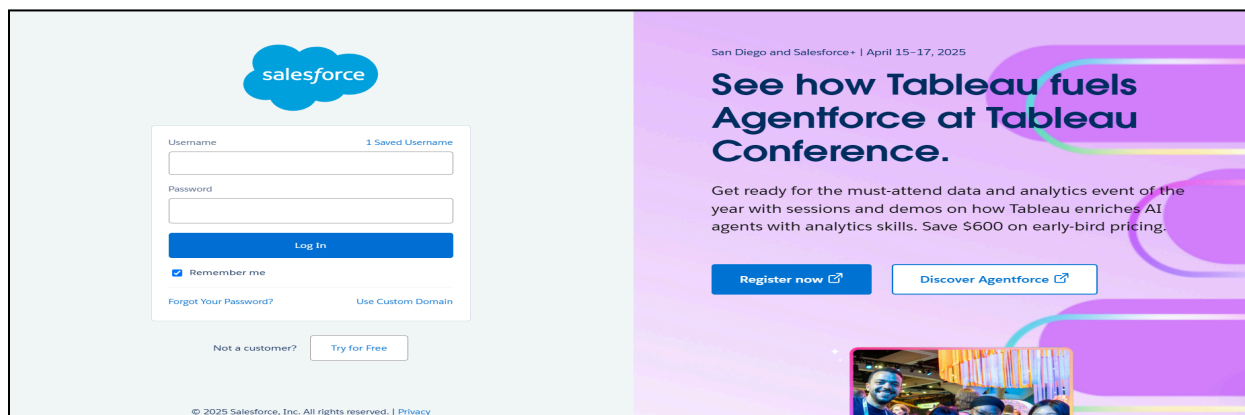


Figure 1: login your Salesforce org

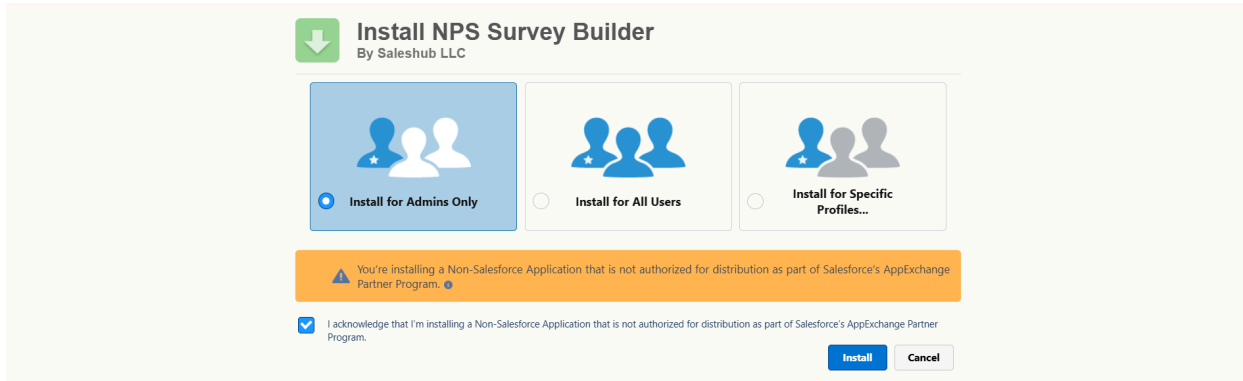


Figure 2: Choose Profile and Install

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 Figure 3)

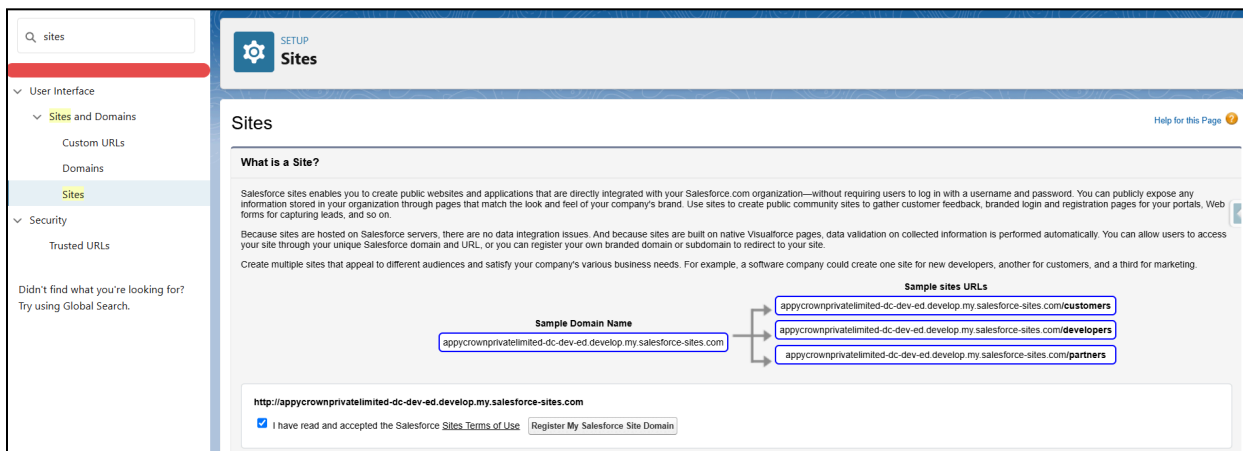


Figure 3: Register Experience Site

Step 3: Enable Digital Experience And Create Experience Site

- Go to Home => Quick Find Box => Search “Digital Experiences”. (refer to Figure 4)
- After the Page reloads click on “New”. For Creating Experience Site. (refer to Figure 5)
- Select “Build Your Own (Aura)” Experience site Template. (refer to Figure 6)
- Click on “Get Started” to create a new experience site. (refer to Figure 7)

- Enter **"Site Name"** and click on **"Create"**. (refer to Figure 8)
- Choose the **"Builder"** option. For Customizing Experience Site. (refer to Figure 9).
- Click the **"Components"** option and drag the **"formPreview"** component to the content area for displaying the Survey Form. (refer to Figure 10)
- Click on the **"Setting"** icon to display the **Thank You** message. (refer to Figure 11)
- Choose **"Standard Page"**. (refer to Figure 12)
- Click on the **"New Blank Page"** at the top-right. (refer to Figure 13)
- Choose **"1 full-width column"** from the current layout to display the Survey Form on the full page. Then click on **"Next"** (refer to Figure 14)
- Enter the **"Name"** and **"API Name"** of the thank you page and click on the **"Create"** button. (refer to Figure 15)
- Click on the **'Component'** and drag **"thankYouPreviewPage"** on the content body. To display a **Thank you message** after submitting the **Survey Form**. (refer to Figure 16)

Note:

- 1) 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 Figure 17)
- 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 Figure 18 Image using the Guest User Profile Name and Any User Profile that needs access to the page ⇒ Click on **"Save & Assign"** button. (refer to Figure 18)
- 3) Click on the **"Publish"** from the top-right of the page. (refer to Figure 19)
- 4) Click the **"Setting"** icon and check the **"Public Access"** checkbox.
(refer to Figure 20)
- 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 Figure 21)

Note:- Check Your email and verify it.

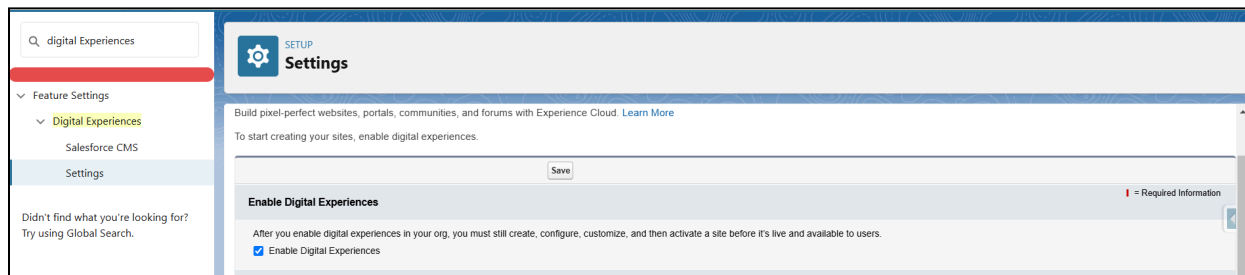


Figure 4: Digital Experience

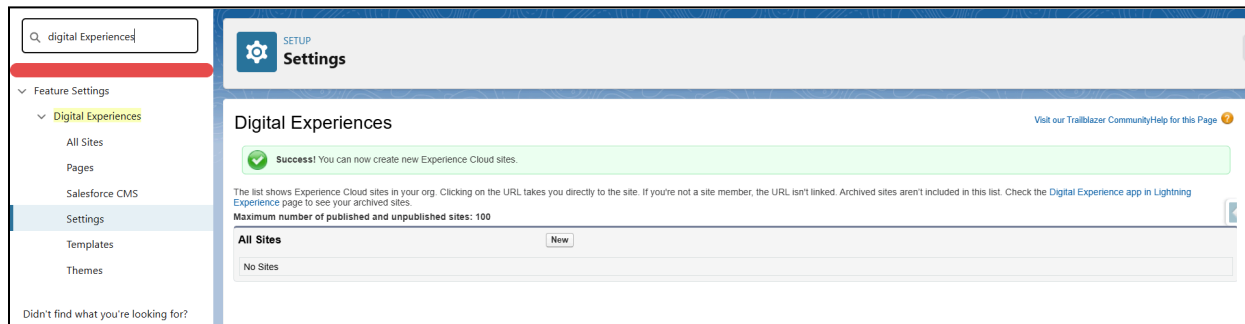


Figure 5: Create New Experience Site

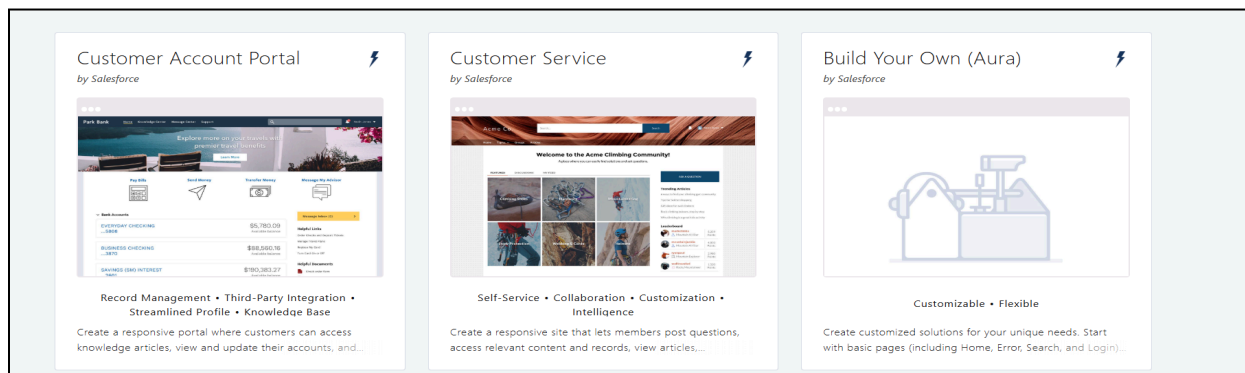


Figure 6: Experience site Template

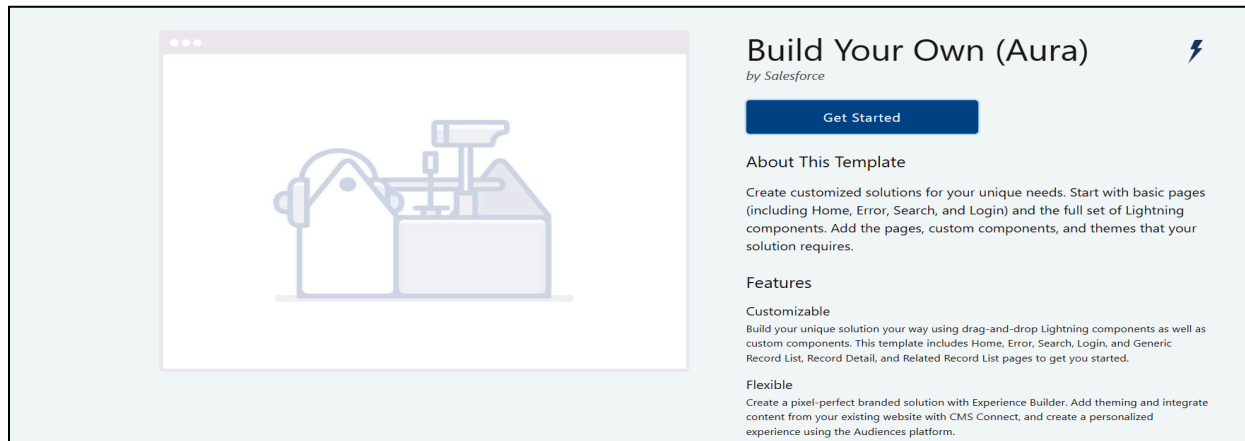


Figure 7: Create Experience Site

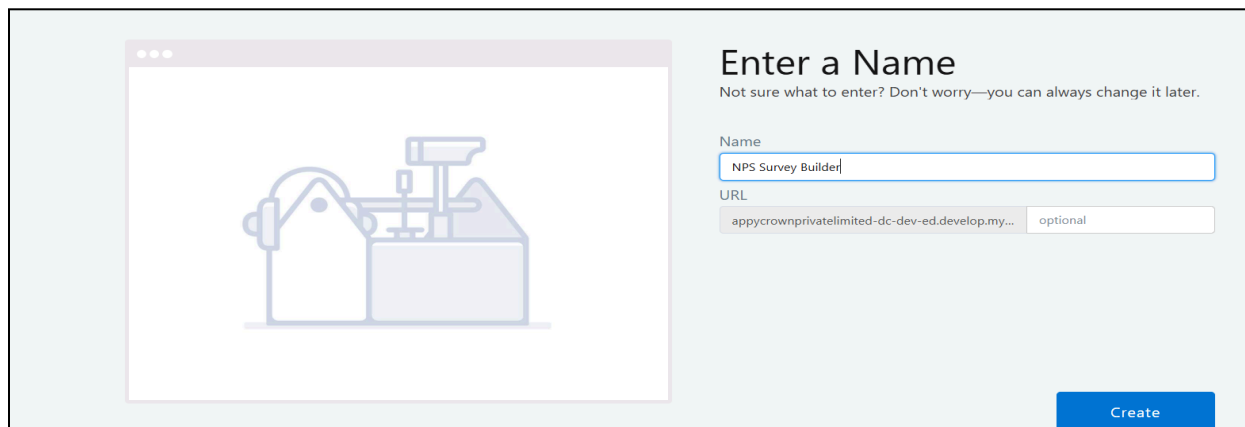


Figure 8: Enter Name and Create

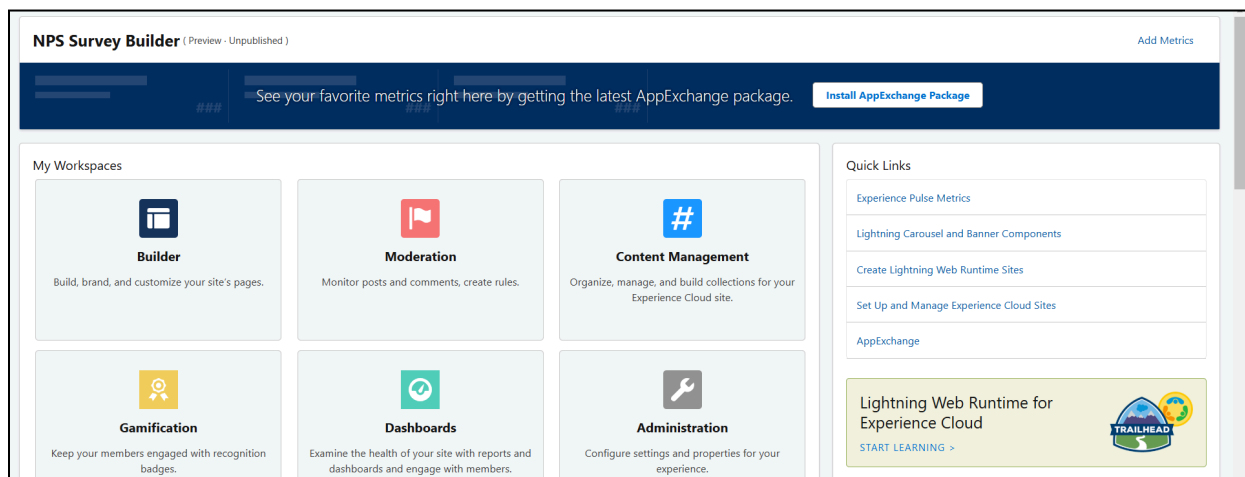


Figure 9: Customize Experience site

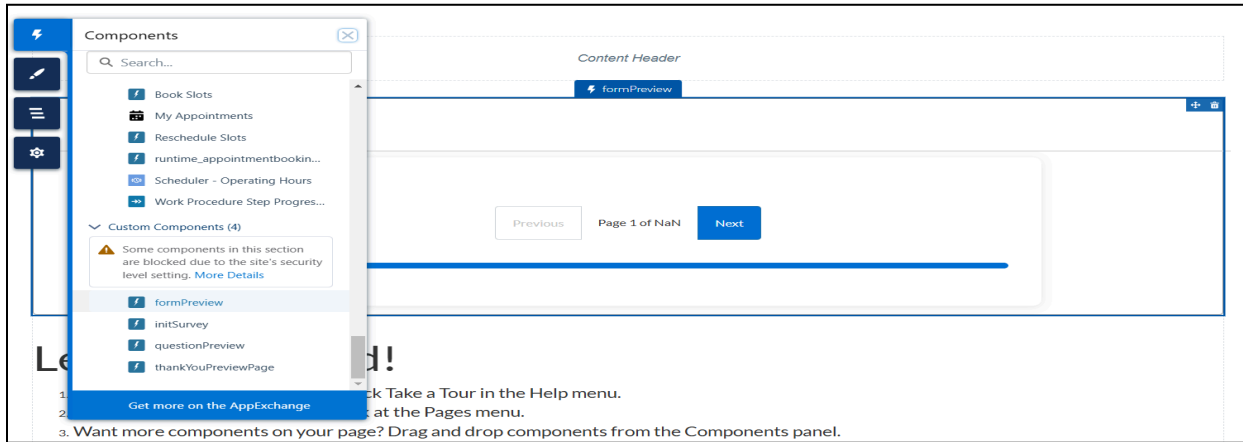


Figure 10: Drag component for display Survey form

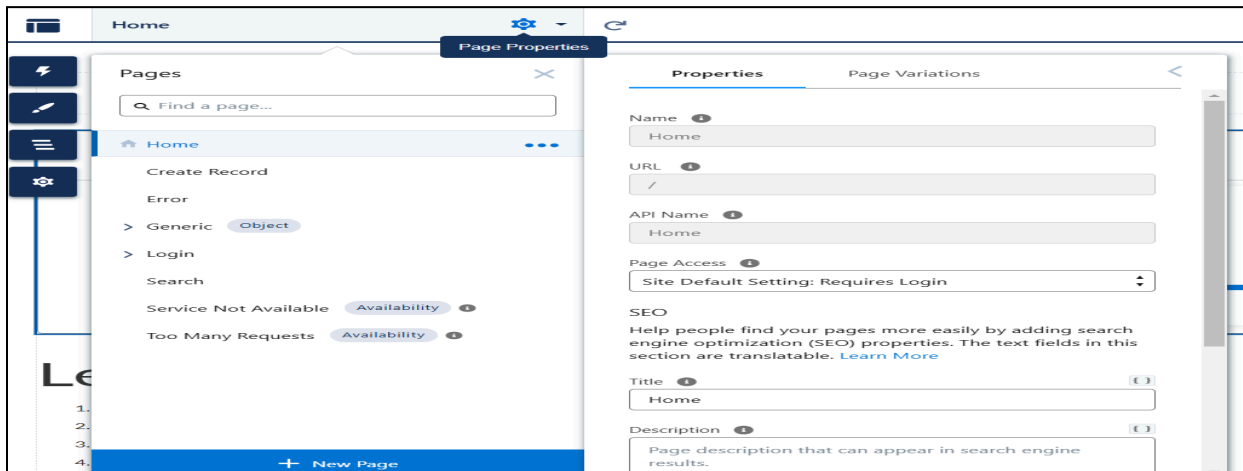


Figure 11: Display Thank You Message

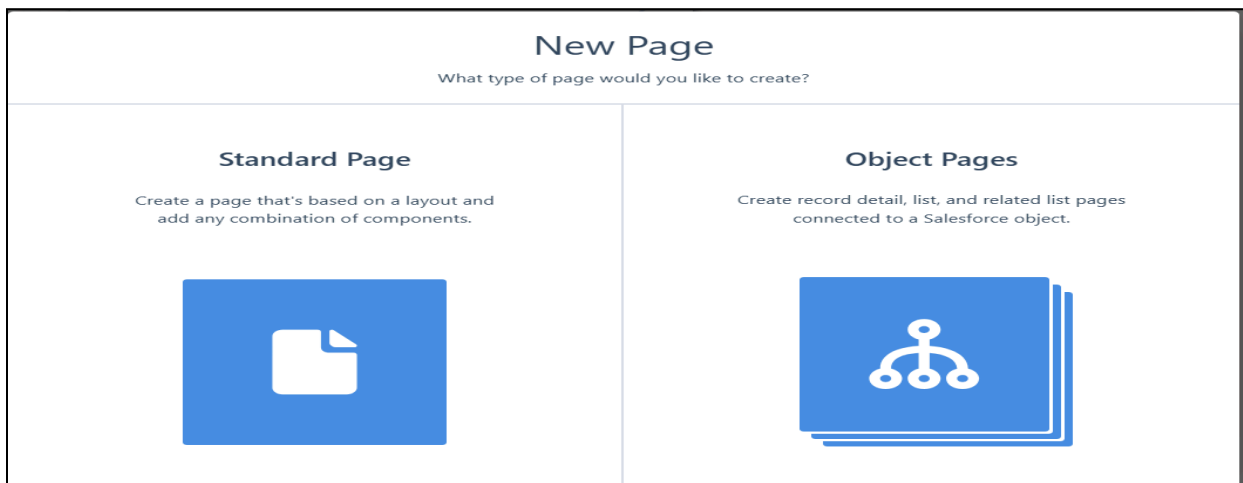


Figure 12: Choose Standard Page

New Page

Choose a preconfigured page or start with a blank page layout.

Account Management

Contact Support

Enablement Lesson Exercise

Enablement Link Exercise

Enablement Milestone Detail

Enablement Video Exercise

Feed Detail

File Detail

Figure 13: Choose a New Blank Page

New Page

Choose a content layout that defines the regions of your page.
to build out the page and stack them as you wish.

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

Figure 14: Choose Experience Site Page Layout

New Page

Give your page a name and a URL.

* Name

* URL

API Name ⓘ

Figure 15: Enter Name and API Name

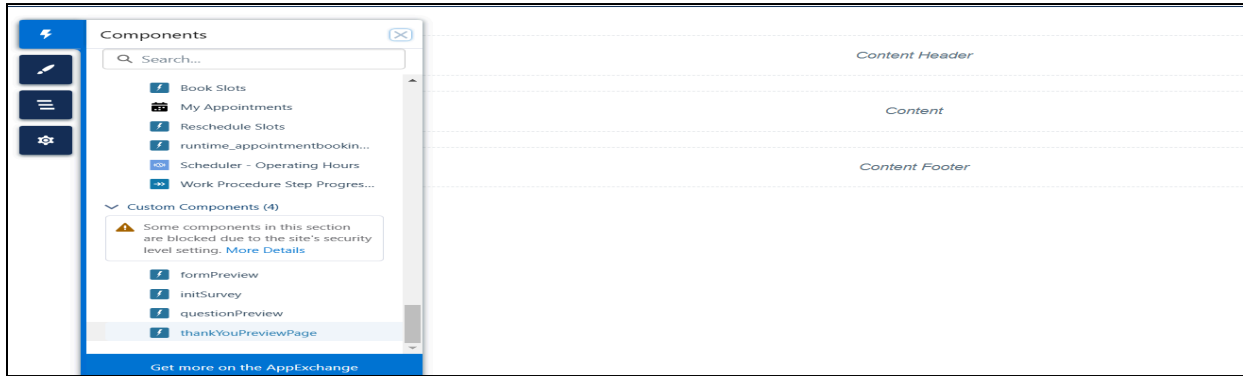


Figure 16: Drag Thank You component

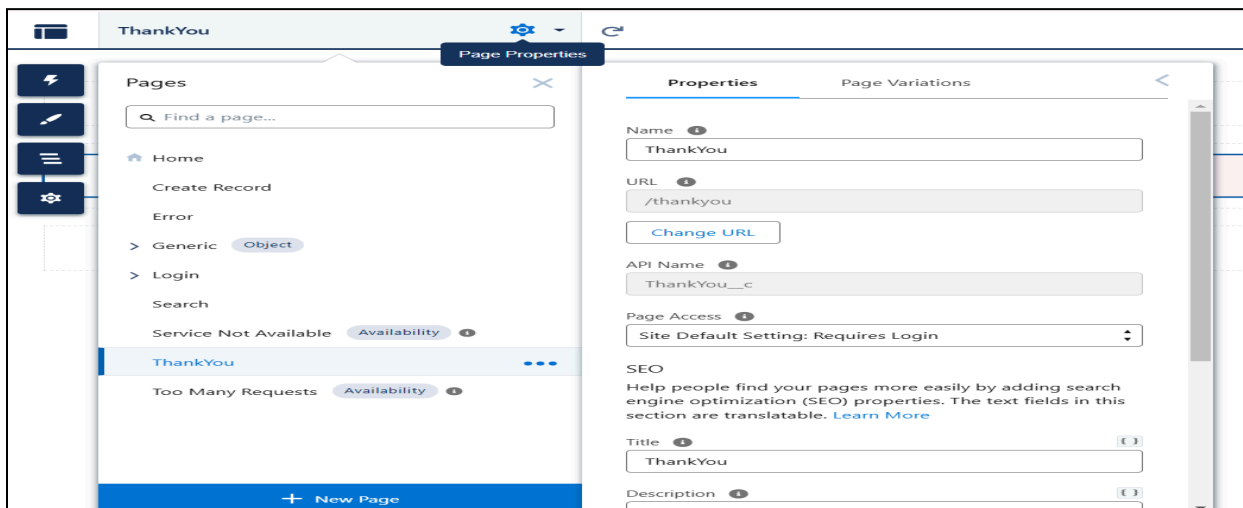


Figure 17: Verify the Thank you Page URL.

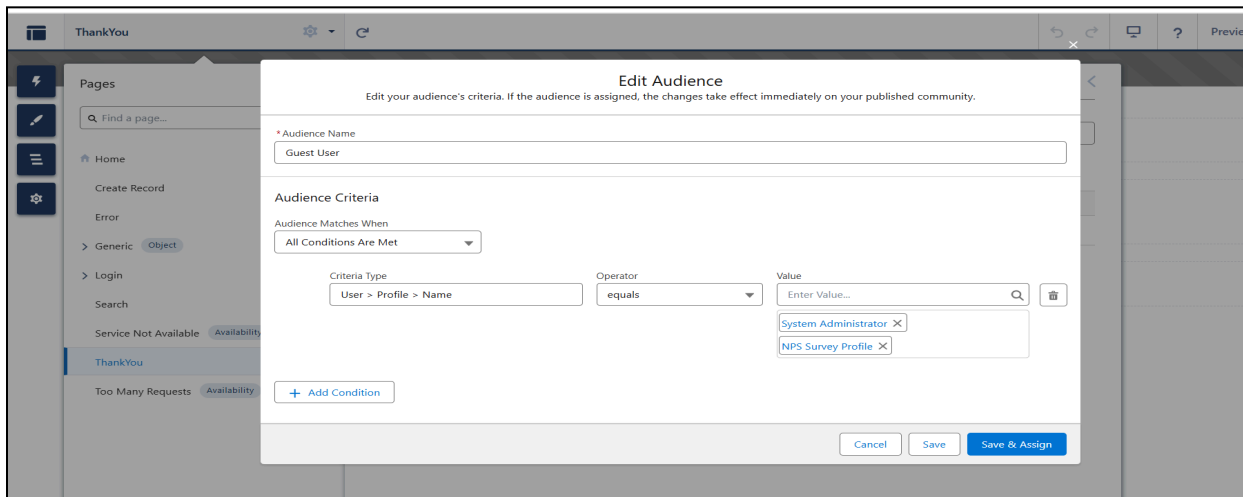


Figure 18: Create an Audience and Assign.

Step 4: Activate Experience Site

- Click on “**Workspaces**” and click on “**Administration**” from the options. (refer to Figure 22)
- Click on “**Activate**” to activate the “**Experience site**”. (refer to Figure 23)
- 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 Figure 24)

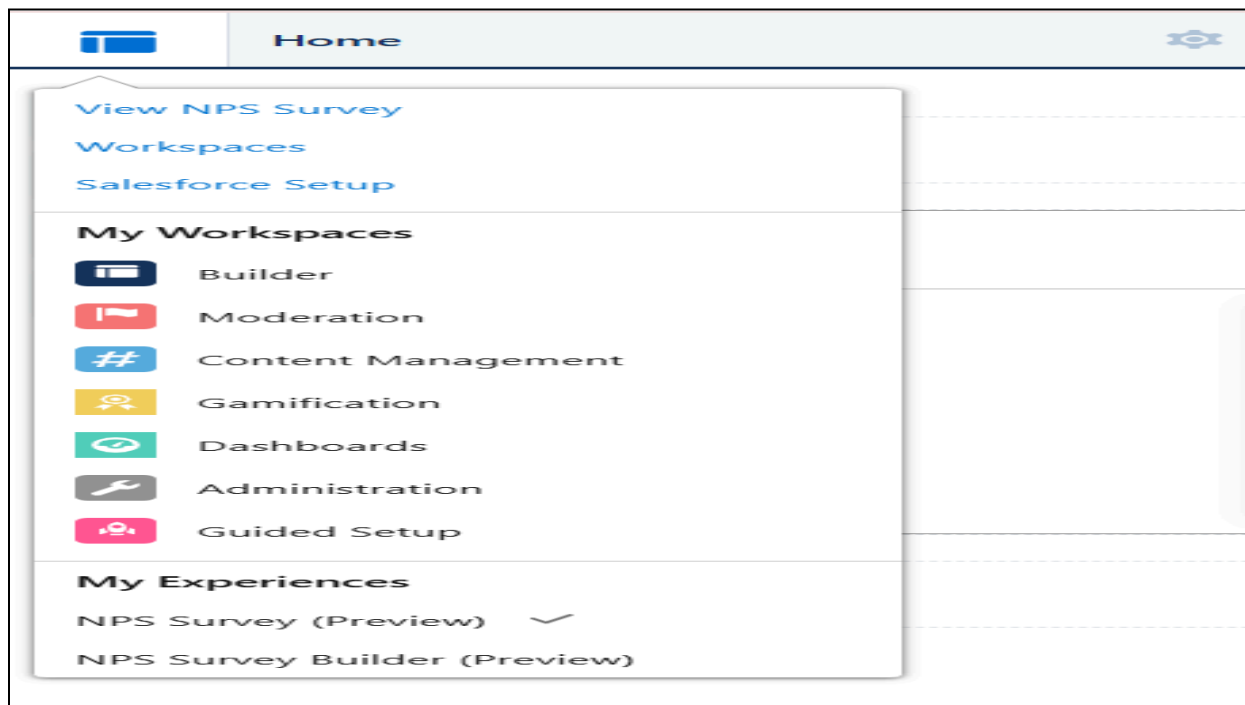


Figure 22: Administration.

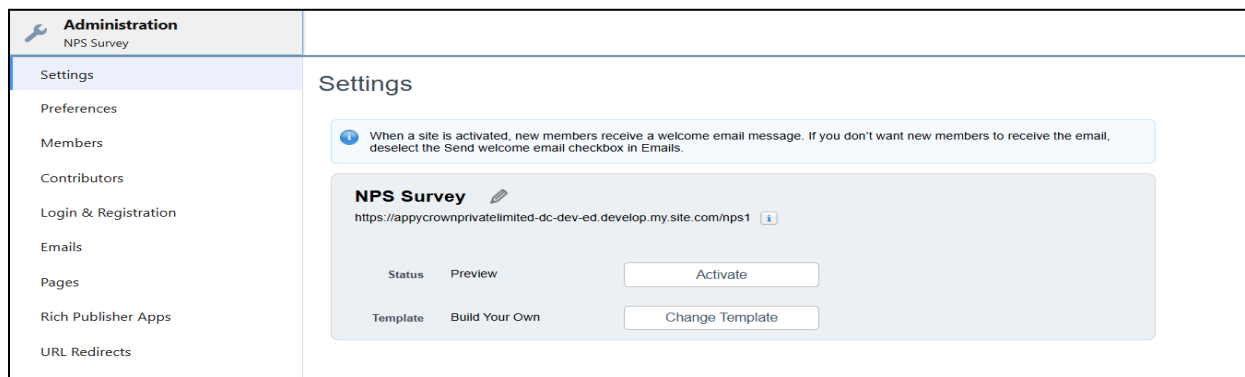


Figure 23: Activate Experience Site.

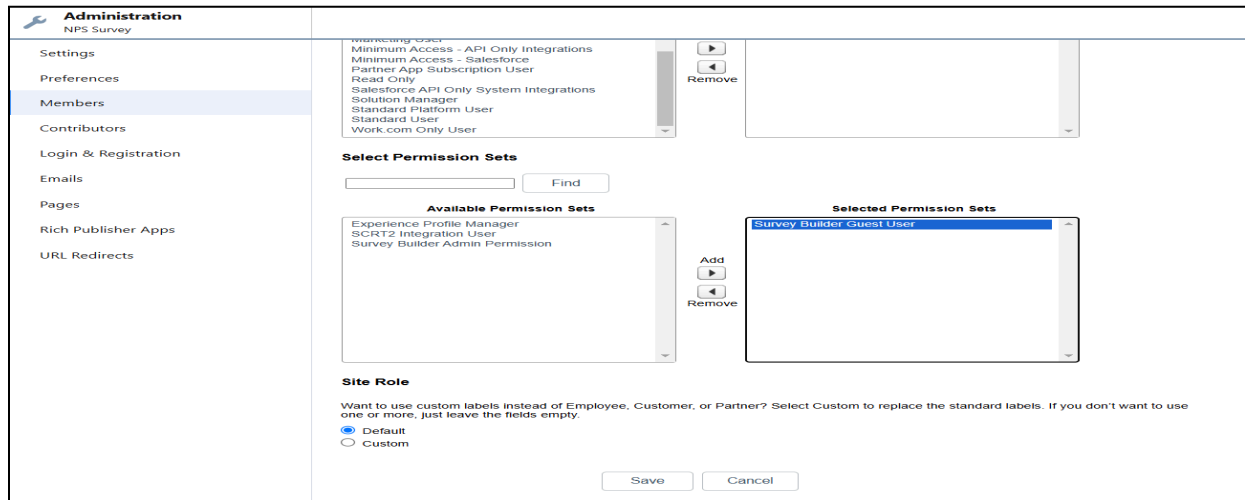


Figure 24: Check Permission Set.

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 Figure 25)

- a. Click on “**Manage Assignments**” (refer to Figure 26)
- b. Click on the “**Add Assignment**” to assign to the **Guest**

User.

(refer to Figure 27)

- 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 Figure 28)

- d. Click on the “**Assign**” button to assign the permission set to the

Guest User. (refer to Figure 29)

- e. Click on “**Done**” to assign a Guest User. (refer to Figure 30)

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 Figure 25)

- a). Click on “**Manange Assignment**” to assign the permission set to the Admin. (refer to Figure 31)
- b). Click on the “**Add Assignment**” to assign. (refer to Figure 32).
- c). Choose “**System Administrator**” Profile and click on the “**Next**” Button. (refer To Figure 33).
- d). Click on the “**Assign**” button to assign the permission set. (refer to Figure 34)
- e). Click on the “**Done**” button for assignment. (refer to Figure 35).

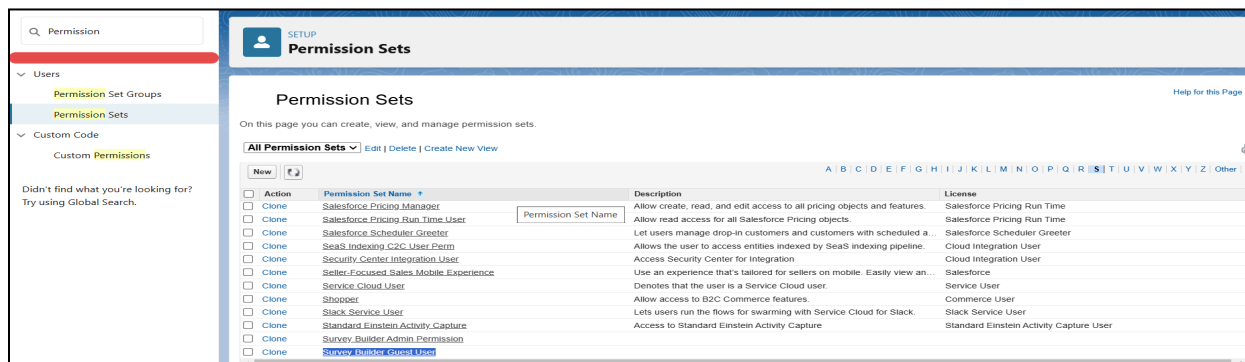


Figure 25: Search Permission Set.



Figure 26: Manage Assignment.

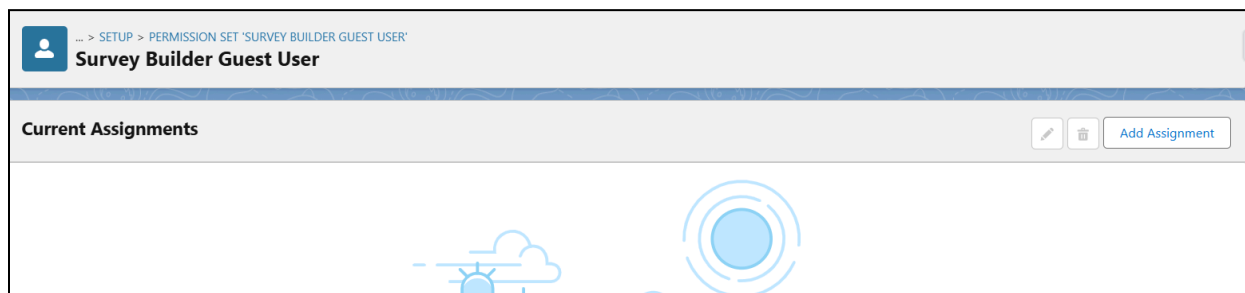


Figure 27: Add Assignment.

1 item selected

Search this list...

	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Ankit Kumar	AKuma	testnps@nps.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00dww00000ivb9j2ah.ombajkoj0jb@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00dww00000ivb9j2ah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	NPS Survey Builder Site Guest User	guest	nps_survey_builder@00dww00000ivb9j2ah.org.force.com		<input checked="" type="checkbox"/>	NPS Survey Builder Profile
<input type="checkbox"/>	Security User	sec	insightssecurity@00dww00000ivb9j2ah.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next

Figure 28: Assign Permission Set to the Guest User.

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
NPS Survey Builder Site Guest ...		NPS Survey Builder Profile	<input checked="" type="checkbox"/>	Guest User License	Never Expires

Cancel Back Assign

Figure 29: Assign to the Guest User.

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
NPS Survey Builder Site Guest User	Guest User License			<input checked="" type="checkbox"/> Success

Done

Figure 30: Assigned.

Permission Set

Survey Builder Admin Permission

Find Settings... | Clone | Manage Assignments | View Summary

Permission Set Overview

Description	
License	
Session Activation Required	<input type="checkbox"/>
Permission Set Groups Added To	0

Figure 31: Manage Assignments.

... > SETUP > PERMISSION SET 'SURVEY BUILDER ADMIN PERMISSION'

Survey Builder Admin Permission

Current Assignments

Add Assignment

Figure 32: Add Assignment to the Guest User.

All Users

1 item selected

Search this list...

	Full Name ↑	Alias	Username	Role	Active	Profile
<input checked="" type="checkbox"/>	Ankit Kumar	AKuma	testnps@nps.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00dww00000ivb9j2ah.ombajkoj0jb@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00dww00000ivb9j2ah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	NPS Survey Builder Site Guest User	guest	nps_survey_builder@00dww00000ivb9j2ah.org.force.com		<input checked="" type="checkbox"/>	NPS Survey Builder Profile
<input type="checkbox"/>	Security User	sec	insightssecurity@00dww00000ivb9j2ah.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel
Next

Figure 33: Choose Admin User.

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Ankit Kumar		System Administrator	<input checked="" type="checkbox"/>	Salesforce	Never Expires

Cancel
Back
Assign

Figure 34: Assign To The Admin.

... > PERMISSION SET 'SURVEY BUILDER ADMIN PERMISSION' > MANAGE ASSIGNMENTS

Survey Builder Admin Permission

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Ankit Kumar	Salesforce			Success

Done

Figure 35: Assigned.

Step 6: Update Experience Site URL.

- Go to Home> Quick Find Box> Search “**All Sites**” and copy the URL.
(refer to Figure 36)
- Go to Home> Quick find Box> **Custom Setting** and click on the “**SurveyFormPage**”. (refer to Figure 37)
- Click on “**Manage**”. To update the SurveyFormUrl and Thank You Page URL.
(refer to Figure 38)
- Click on the “**New**”. To update the Form URL and Thank you Page URL.
(refer to Figure 39).
- 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 40 and 41).

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

- Click on the “**Save**” button to save the URL.

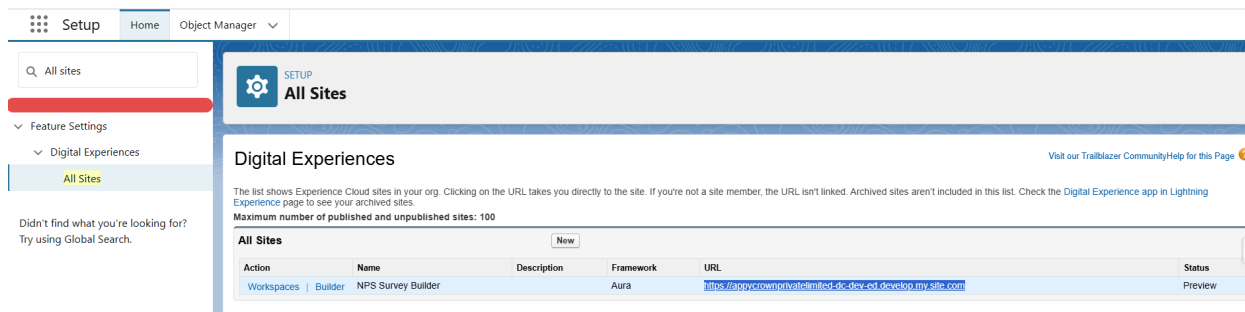


Figure 36: Copy URL.

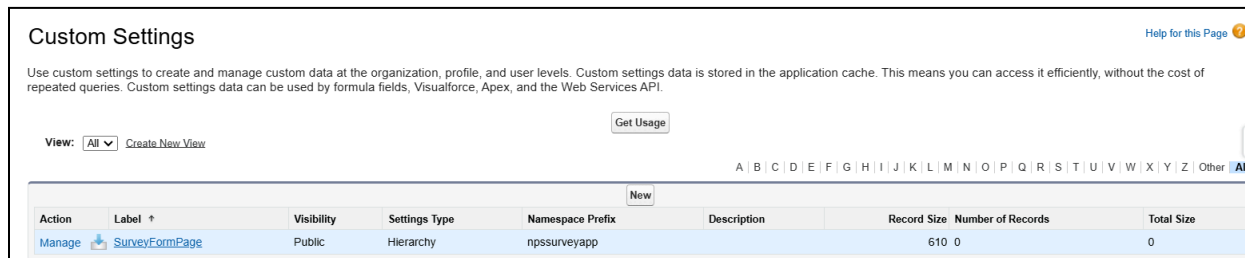


Figure 37: Edit Custom Setting.

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	npssurveyapp__SurveyFormPage__c	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 38: 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 app, a specific profile, or just a general user.

New

▼ Default Organization Level Value

View: All Create New View

Figure 39: Manage Custom Setting.

SurveyFormPage Edit

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

Edit SurveyFormPage

Save Cancel

SurveyFormPage Information

Location	Saleshub
FormPageURL	https://force-momentum-23k
ThankyouPageURL	https://force-momentum-23k

Figure 40: Paste URL.

ThankYou

Pages

Find a page...

Home
Create Record
Error
Generic Object

Properties

Page Variations

Name

ThankYou

URL

/thankyou

Change URL

Figure 41: 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 Figure 42)
- 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 43)
- Go to Home> Quick Find Box> search “**Deliverability**”. (refer to Figure 44)

Note:- Make sure “Access to send Email” is “**All Email**”.

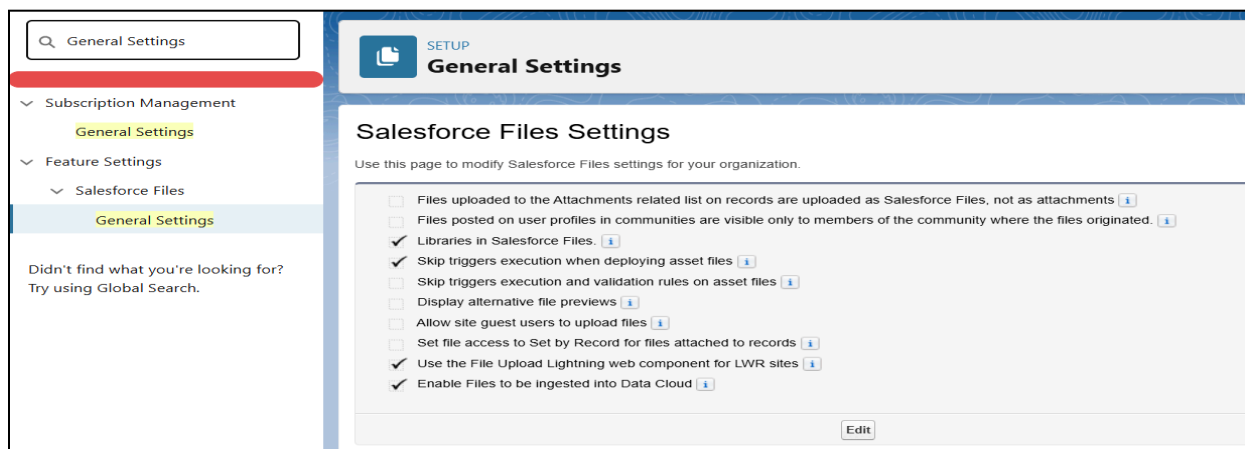


Figure 42: Check The Access.

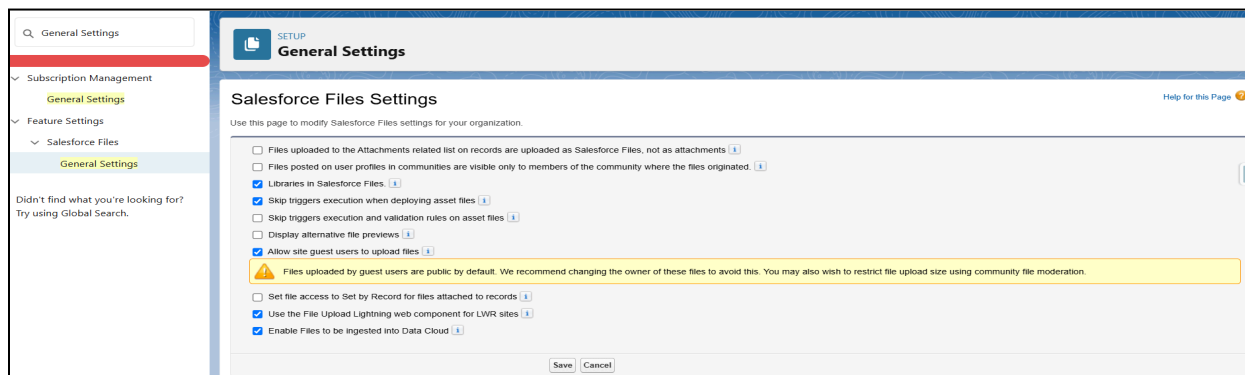


Figure 43: Give The Access.

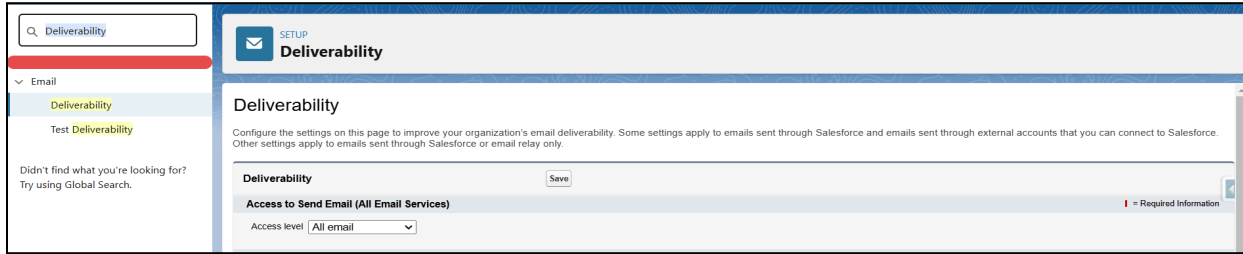


Figure 44: Check Deliverability

Step 8: Create Sharing Settings

- Go to Home>Quick Find Box>search “**Sharing Settings**”. (refer to Figure 45)
- Search the “**Field Mapping**” object under “**Sharing Rule**” and click on “**New**”. (refer to Figure 46)
- Enter “**Rule Label**” and check the checkbox of “**Guest User Access**”.
(refer to Figure 47)
- 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 48)

Note:- Please do the same points for the “**Question**”, “**Question Rule**”, “**Response**”, “**Score Level**”, “**Survey Distribution**”, and “**Survey Form**” for creating Sharing Settings.

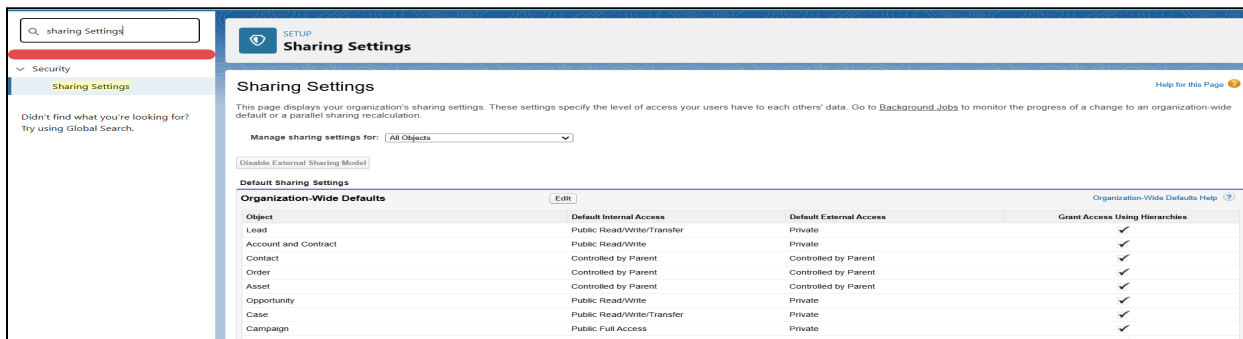


Figure 45: Sharing Setting

Sharing Settings

No sharing rules specified.

Work Type Sharing Rules
New Recalculate

No sharing rules specified.

[Work Type Sharing Rules Help ?](#)

Work Type Group Sharing Rules
New Recalculate

No sharing rules specified.

[Work Type Group Sharing Rules Help ?](#)

Field Mapping Sharing Rules
New Recalculate

[Field Mapping Sharing Rules Help ?](#)

Action	Criteria	Shared With	Access Level
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Figure 46: Search Object Name

Step 1: Rule Name
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 47: Enter Rule Name

Sharing Settings

Step 3: Select which records to be shared

This sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these criteria, you're allowing immediate and unlimited access to all records matching these criteria to anyone accessing the site, even without logging in. To secure your site and its data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any exposure of your data to guest users related to this change from default settings.

Criteria

Field	Operator	Value	
Created By ID	not equal to		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Additional Options
☐ Include records owned by high-volume users

Step 4: Select the users to share with

Share with
NPS Survey Site Guest User

Step 6: Select the level of access for the users

Access Level
Read Only

Save Cancel

Figure 48: Select Field and Share With