

# NPS SURVEY BY SALESHUB

Discover the transformative power of customer feedback with the latest release of our NPS Survey solution. This new version empowers businesses to seamlessly integrate Net Promoter Score (NPS) surveys into their Salesforce ecosystem, automating the process of gathering, analyzing, and acting on customer insights. With enhanced features for survey customization, real-time analytics, and automated follow-ups, our NPS Survey solution helps you understand your customers better, improve their experiences, and drive loyalty like never before. Dive into the details and learn how this powerful tool can elevate your customer service and satisfaction strategies to new heights.



Installation  
Guide

available on  
AppExchange



# NPS Survey – Installation Guide

## Introduction

SalesHub’s NPS Survey Solution is designed to help businesses accurately measure customer satisfaction and loyalty. By leveraging Salesforce integration, advanced analytics, and user-friendly survey tools, our solution provides actionable insights to drive growth and improve customer experiences.



The image shows a promotional card for the NPS Survey application on the Salesforce AppExchange. The card features a dark blue background with a hand pointing at a screen displaying smiley face icons. In the top left, there is a logo consisting of a cloud with a gauge and the letters 'NPS' inside, with two arrows pointing up and down. To the right of the logo, the text reads 'NPS Survey' in a large white font, followed by 'Measure Net Promoter Score , Transform Customer Service' in a smaller white font. At the bottom left, there is a white rounded rectangle containing the Salesforce logo and the text 'available on AppExchange'. To the right of this rectangle is a QR code.

**NPS Survey**  
Measure Net Promoter Score , Transform Customer Service

salesforce available on AppExchange

**No matter which customer satisfaction and/or loyalty framework you use, any framework or methodology will be of little use unless its feedback is not acted upon. Net Promoter Score surveys reach out to customers to understand their perception of the brand. But most of the time, the feedback is collected as just one more thing to talk about and doesn't become part of the operational execution.**

Net Promoter Score (NPS) is a metric company's use to measure customer loyalty as it relates to a company brand or product or service. Net Promoter Score measures customer experience based on a customer's response to a single question: "Using a scale of 0-10, how likely is it that you would recommend us to a friend or colleague?" Capturing this customer feedback in Salesforce contributes to a better understanding of overall customer relationship, while also educating marketing and customer service teams for further improvement opportunities.

NPS Survey App for Salesforce is a great survey tool which could be used to automatically trigger surveys based on customer activity, and then push responses to Salesforce so your team can close the loop.

### **Scoring criteria consideration:**

- Promoters (score 9-10): loyal enthusiasts who will continue buying and referring others, fueling growth.
- Passives (score 7-8): Satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- Detractors (score 0-6): Unhappy customers who can damage the brand and impede growth through negative word-of-mouth.

# Steps - NPS Survey App Installation

- **Step 1 - Make sure your org Domain is registered**

If the Domain is not registered, then register the domain name first. How to register the domain. Please click -

[https://help.salesforce.com/articleView?id=sites\\_creating\\_subdomain.htm&type=5](https://help.salesforce.com/articleView?id=sites_creating_subdomain.htm&type=5)

- **Step 2 - Enable the Enhanced Profile User Interface**

From Setup, enter User in the Quick Find box, then select User Management Settings. Enable Enhanced Profile User Interface.

Create a site

Setup > Sites > Click on New (Button)

**Site Label:** NPS Survey

**Active:** Checked

Active Site Home Page: Choose (**NPS\_Survey**)

Click **Save**

- **Step 3- Insert the domain site URL of your org into the Custom Setting field(Site URL).**

Copy your site domain name from the sites section. From **Setup**, enter **Sites** in the Quick Find box, then select and copy the domain name.

Your Salesforce site domain name is `deanbhagi-developer-edition.ap15.force.com`

Salesforce Sites [Terms and Conditions](#)

**Sites (deanbhagi-developer-edition.ap15.force.com)** New

Action	Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By
<a href="#">Edit</a>   <a href="#">Deactivate</a>	Nps Survey	<a href="http://deanbhagi-developer-edition.ap15.force.com/">http://deanbhagi-developer-edition.ap15.force.com/</a>		<input checked="" type="checkbox"/>	Force.com	Bhagirath Singh, 9/13/2019 4:09 AM

From Setup, enter **Custom Settings** in the Quick Find box, then click **Manage** in front of '**CustomSite**' and insert a new record with the domain name.

SETUP Custom Settings

Custom Settings Help for this Page

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

View: All Create New View Get Usage

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 All

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
<b>Manage</b>	CustomSite	Public	Hierarchy	nps_survey		355	1	355

SETUP Custom Settings

CustomSite Edit Help for this Page

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

**Edit CustomSite** Save Cancel

**CustomSite Information** Required Information

Location: Profile System Administrator

SiteUri: https://d5j00000d91iteaz-de

- **Step 4- Give the Permissions to the Site.**

From Setup, enter Sites in the Quick Find box, then click on Under Site Label 'NPS Survey'.

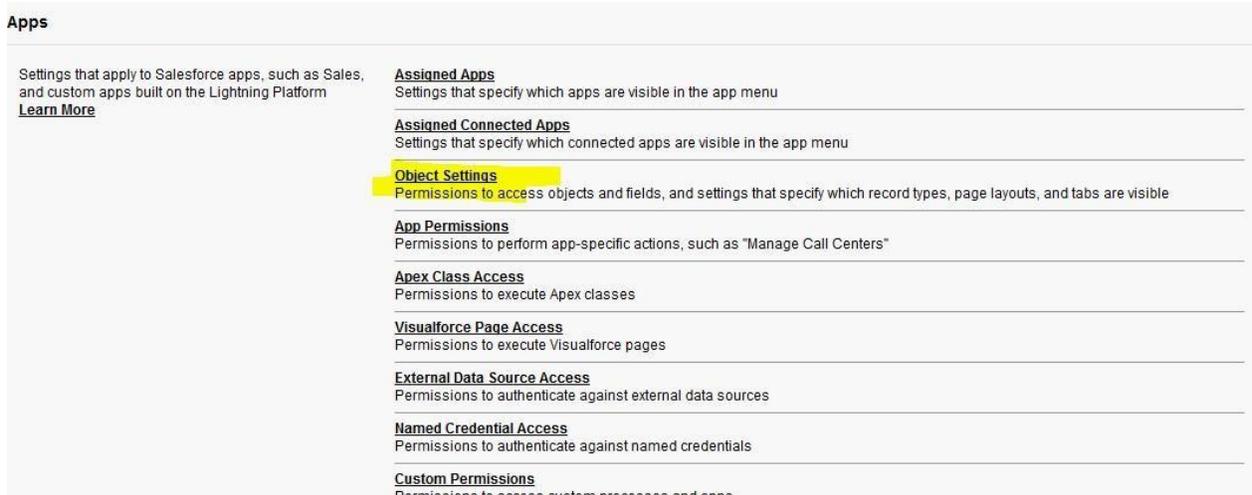
Sites (deanbhagi-developer-edition.ap15.force.com) New

Action	Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By
Edit   Deactivate	Nps Survey	http://deanbhagi-developer-edition.ap15.force.com/		✓	Force.com	Bhagirath Singh, 9/13/2019 4:09 AM

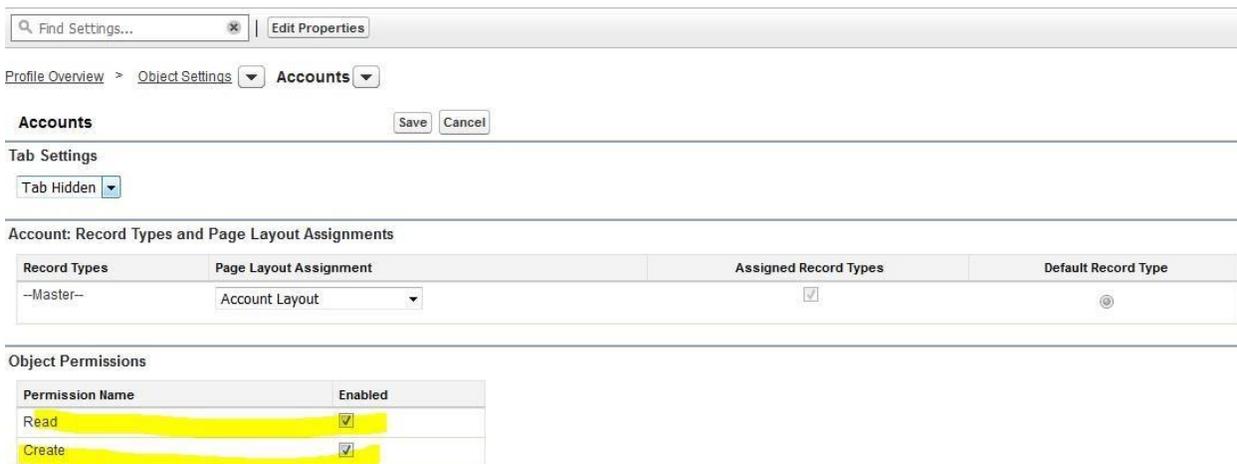
Click on Public Access Setting.



Click on **Object** Settings. And give **Read** and **Create** Access permission for related objects which are: **Accounts, Opportunities, Contact,** and **Survey Score.**



Click on each of the four objects Account, Opportunity, Contact, Survey Score, Survey Question, Survey Schedule, Survey Program (Campaign), Survey Program Member (Campaign Member), and NPS Action Plan one by one and give the permission like below:



Find Settings... | Edit Properties

Profile Overview > Object Settings ▾ Opportunities ▾

**Opportunities**

Save Cancel

**Tab Settings**

Tab Hidden ▾

**Opportunity: Record Types and Page Layout Assignments**

Record Types	Page Layout Assignment	<input type="checkbox"/> Assigned Record Types	Default Record Type
--Master--	Opportunity Layout ▾	<input checked="" type="checkbox"/>	<input type="radio"/>

**Object Permissions**

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>

**Field Permissions**

Field Name	<input type="checkbox"/> Read Access	<input type="checkbox"/> Edit Access
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Give Read and Create Permission to Account, Contact, Campaign, Campaign Member, Opportunity, Survey Score, Survey Question, Survey Schedule, Survey Program, and NPS Action Plan Object

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
NPS Action Plans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
NPS Survey Customer Incentives	<input type="checkbox"/>	<input type="checkbox"/>				
NPS Survey Incentives	<input type="checkbox"/>	<input type="checkbox"/>				
Survey Journals	<input type="checkbox"/>	<input type="checkbox"/>				
Survey Programs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Survey Questions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Survey Responses	<input type="checkbox"/>	<input type="checkbox"/>				
Survey Schedules	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Survey Scores	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				

Permit custom fields on the Contact Site URL as well.

Site url

**Permit to Survey Score object of Read & Create, also give the Read Access**

Profile Overview > Object Settings Survey Scores

Survey Scores Save Cancel

Tab Settings

Tab Hidden

Record Types and Page Layout Assignments

Record Types	Page Layout Assignment	Assigned Record Types	Default Record Type
--Master--	Rating Layout	<input checked="" type="checkbox"/>	Ⓢ

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Read Access	Edit Access
Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Additional Client Feedback	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact	<input type="checkbox"/>	<input type="checkbox"/>

**and Edit Access to each field.**

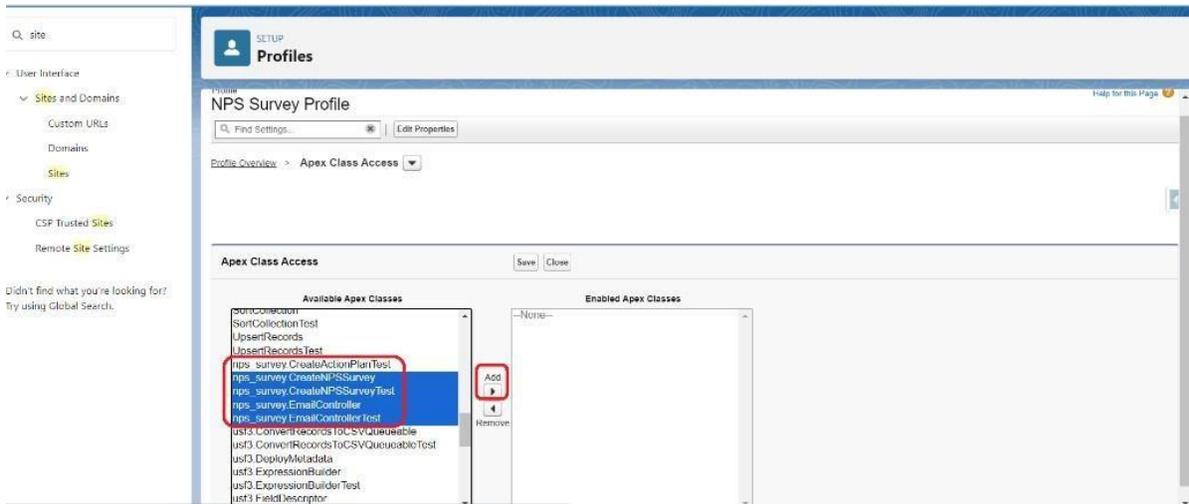
- **Step 5- Permit Apex Classes.**

Click on '**Apex Class Access**'

<b><u>Assigned Connected Apps</u></b>
Settings that specify which connected apps are visible in the app menu
<b><u>Object Settings</u></b>
Permissions to access objects and fields, and settings that specify which record
<b><u>App Permissions</u></b>
Permissions to perform app-specific actions, such as "Manage Call Centers"
<b><u>Apex Class Access</u></b>
Permissions to execute Apex classes
<b><u>Visualforce Page Access</u></b>
Permissions to execute Visualforce pages
<b><u>External Data Source Access</u></b>
Permissions to authenticate against external data sources
<b><u>Named Credential Access</u></b>
Permissions to authenticate against named credentials
<b><u>Custom Permissions</u></b>
Permissions to access custom processes and apps

Select All **NPSSurvey** classes like below screenshot and click on the add button.

- BulkEmailController
- BulkEmailController
- CreateNPSSurvey
- CSATSurveyFormController
- EmailController
- FollowupSurveyFormController
- SendBatchEmail
- SurveyQuestionInstaller
- SurveyBatchScheduler
- SurveyScheduleBatch
- SurveyScheduleCaseBatch
- SurveyScheduleContactBatch
- SurveyScheduleController
- SurveyScheduleOppBatch
- SurveyScoreTriggerHandler
- CampaignMemberTriggerHandler



• **Step 6- Permit Visualforce Page Access**

Permissions to access objects and fields, and settings that speci

**App Permissions**

Permissions to perform app-specific actions, such as "Manage C

**Apex Class Access**

Permissions to execute Apex classes

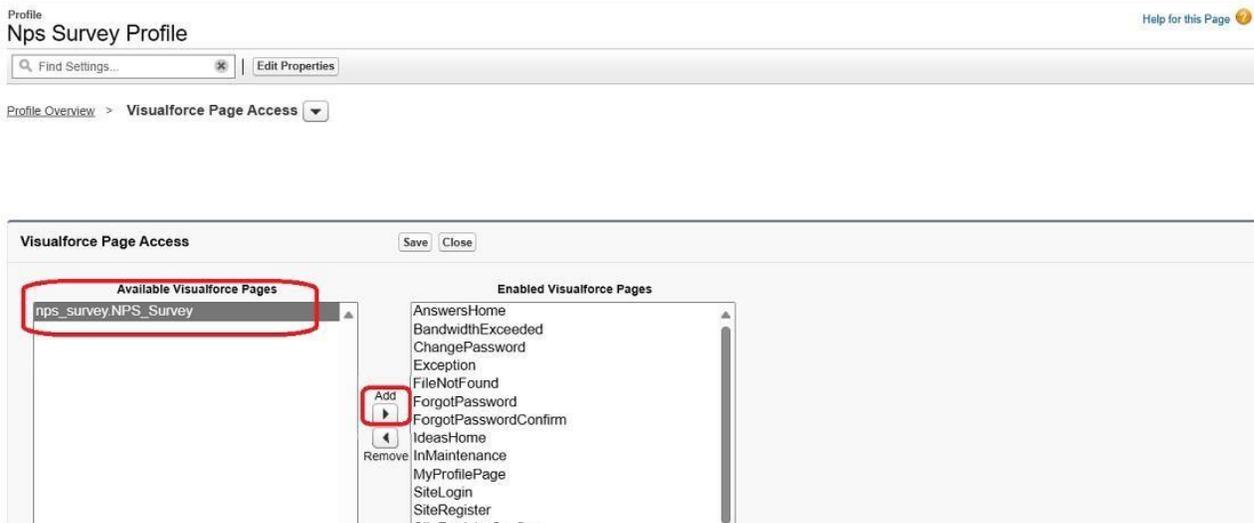
**Visualforce Page Access**

Permissions to execute Visualforce pages

**External Data Source Access**

Permissions to authenticate against external data sources

**Select all NPS survey Visualforce pages and click on the add button as shown below:**



- **Step 7- Assign Managed Package License**

After Clicking on **Public Access** Setting, you will be able to see either '**Assigned User**' or

The screenshot shows the Salesforce 'Profile' page for 'Nps Survey Profile'. At the top, there is a search bar for settings and an 'Edit Properties' button. Below this, the 'Profile Overview' section is active, displaying a table with the following data:

Description	
User License	Guest User License
Created By	Pooja_NPS: 10/04/2024, 11:57 am
Custom Profile	<input checked="" type="checkbox"/>
Last Modified By	Pooja_NPS: 10/04/2024, 12:52 pm

Below the overview, there is an 'Assigned Users' tab. Underneath, the 'Apps' section lists various settings: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, and Visualforce Page Access.

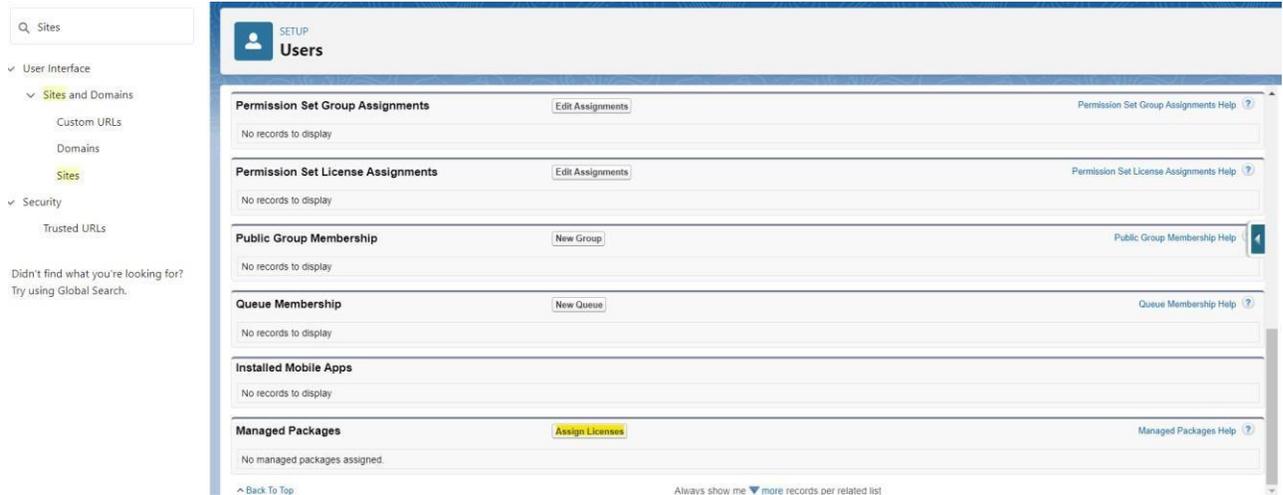
'**View Users**', Click on that,

Then click on the Site Guest User NPS Survey Label,

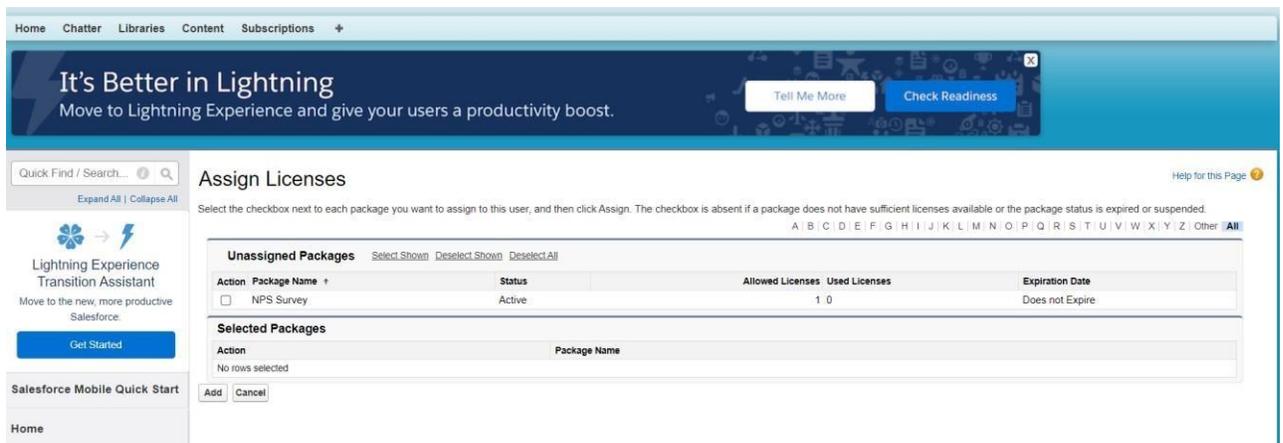
The screenshot shows the Salesforce 'Profiles' page. On the left, a navigation menu is visible with 'Sites' selected. The main content area shows the 'Nps Survey Profile' page. Below the header, there is a table listing profiles:

Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Site Guest User: Nps Survey	guest	nps_survey@00dir000001u3dm2aa.org.force.com		<input checked="" type="checkbox"/>	Nps_Survey_Profile

Scroll down you can see the section 'Managed Packages' and click on 'Assign Licenses'



button, then you will get this page, and select the 'NPS Survey' and click on add,



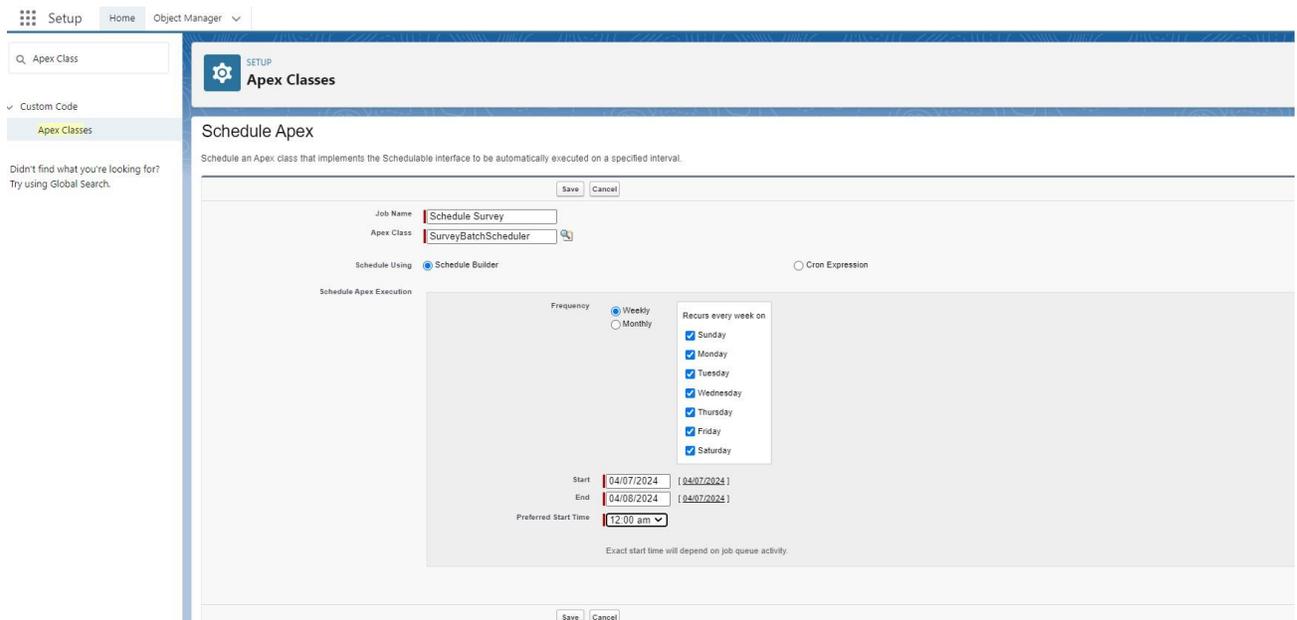
- **Step – 8 Add Dashboard on Home Page Tab**

Click on Home Tab => Click Setup => Click on Edit Page => Drag Dashboard into the Canvas => Select NPS (NPS Survey)

- **Step – 9 Schedule SurveyBatchSchedule**

**Class Quick** Find box => Apex Class =>

Schedule Apex =>



- **Step -10 Add the 'Send NPS Survey' button on the opportunity page layout.**
- **Step -11 Add the 'NPS Internal' button on the Opportunity Page layout.**
- **Step -12 Add the 'Send NPS Survey button' button on the Opportunity list view.**
- **Step -13 Add the 'Send NPS Survey' button on the Contact list view.**

- **Step -14 Create an Account and Contact and related Opportunity. Now open the opportunity detail page.**

Click on the 'NPS Internal' button, it will open a form. Fill in the form and save it. It will show you a success message.

Now your app is ready, you can send the NPS survey by email by clicking the 'Send Feedback Email' button from the Opportunity page.

Calculating the company's Net Promoter Score regularly will not provide longstanding value if we do not act on the feedback that is given by our clients. Closing the feedback loop with clients to ensure we fully understand and act upon any concerns they raised during the NPS survey is essential to improving the client experience and turning Detractors and Passives into Promoters. Logging follow-up activity and action plans in Salesforce will better enable the company's account managers and leadership to track follow-up progress and ensure every client concern is addressed.

### How To Create a Schedule Survey?

* Survey Type	Send Frequency
NPS	Daily
Send Follow-up	Send Follow-up Frequency (Days)
Yes	20
* Field Trigger	* Select Field
Account	Account Name
* Select Operators	* Field Value
Equal To	Test Account
Schedule	Survey Link
Auto	NPS Link

Schedule

In Schedule Survey, for example, if you select "Account" in the Field Trigger and "Account Name" in the SelectField, you need to select an operator and input a value in the Field Value. After that, submit the Schedule Survey. We have already created a Scheduled Job in Step 9. That Scheduled Job class will execute at the specified time you have selected. It will fetch the Account records that match the Select Field and Field Value of the Schedule Survey record, and send an email to the related contacts of those Accounts.

The same process will apply to all objects, including Contact, Opportunity, and Case. This job will work for the Account, Contact, Opportunity, and Case objects. It will fetch the latest survey schedule for each of these objects and perform actions on the latest survey schedule of each one.

## Key Features:

- **Salesforce Integration:** Seamlessly integrates with Salesforce to automate survey distribution and data collection.
- **Customizable Surveys:** Create surveys tailored to your business needs with easy-to-use templates.
- **Real-Time Analytics:** Get instant access to survey results with real-time dashboards and reports.
- **Advanced Segmentation:** Analyze feedback by customer segment, product line, or region.
- **Automated Workflows:** Set up automated follow-up actions based on survey responses.
- **Multi-Channel Distribution:** Distribute surveys via email, SMS, web links, or QR codes.

## Benefits:



**Improve Customer Retention:** Identify at-risk customers and address their concerns promptly.



**Enhance Customer Experience:** Gain insights into customer preferences and pain points to enhance service delivery.



**Boost NPS Scores:** Implement targeted actions to improve your Net Promoter Score and overall brand reputation.



**Data-Driven Decisions:** Leverage detailed analytics to make informed business decisions.

## Technical Specifications:

- Compatibility: Salesforce Classic and Lightning Experience
- Languages Supported: Multiple languages including English, Spanish, French, and more
- Security: Data encryption, GDPR compliant
- Deployment: Cloud-based, accessible on any device

## Pricing:

**Out of the Box:** \$5 per user/month.

Contact SalesHub for a personalized quote based on your business requirements.

Contact Information:

- Website: [www.saleshub.com](http://www.saleshub.com)
- Email: [support@saleshub.com](mailto:support@saleshub.com)
- Phone: +1 (833) 733-2468

## Resources

Discover how the NPS Survey by SalesHub can transform your customer service by automatically triggering surveys based on customer activity and seamlessly integrating responses into Salesforce, enabling your team to close the loop effectively.

- NPS Survey – Salesforce AppExchange Link – <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FtRTKUA3>
- NPS Survey – Solution Detail Site Link – <https://saleshub.info/nps-survey>

NPS Survey App for Salesforce is an excellent survey tool that could automatically trigger Surveys will be based on customer activity, and then responses will be pushed to Salesforce so your team can close the loop.

- ☑ Net Promoter Score measures customer experience based on a client's response to a single question: "Using a scale of 0-10, how likely is it that you would recommend our Company to a friend or colleague?"
- ☑ Capturing this client feedback in Salesforce contributes to a better understanding of the overall client relationship while also informing marketing and process improvement efforts.
- ☑ Closing the feedback loop with clients to ensure we fully understand and act upon any concerns they raised during the NPS survey is essential to improving the client experience and turning Detractors and Passives into Promoters.

Ready to measure **Net Promoter Score (NPS)** and transform Customer Service?



**Get it Now ...**