

Automation – Survey Scheduler & Reminders

Business User Guide

Advanced feature guide for creating event-based survey automations, sending surveys, and managing reminder emails for non-responders.

End-to-End Workflow

From event creation to survey delivery and reminder follow-up.

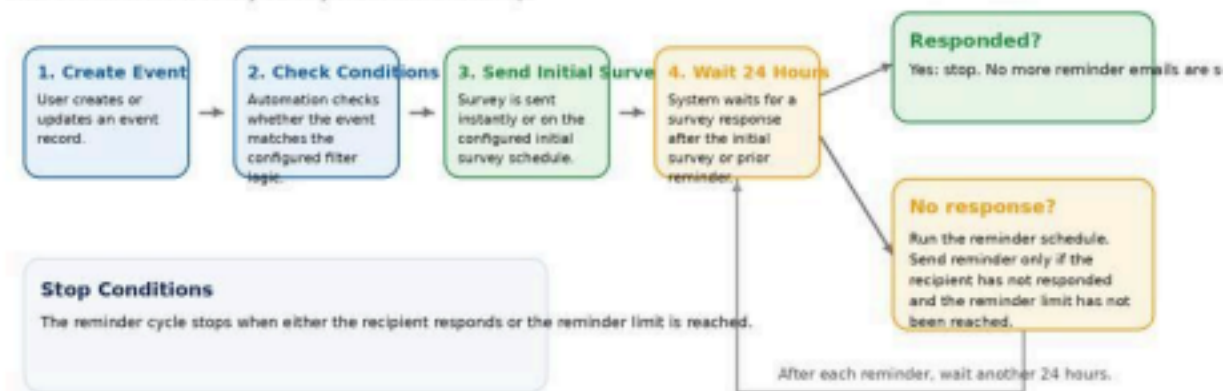


Figure 1. End-to-end survey automation workflow.

Plain-language summary: The automation watches events that match your filters. It sends the initial survey, waits for a response, and sends reminder emails only when the recipient has not responded within 24 hours.

1. What This Automation Does

This advanced automation feature helps teams send surveys from event records and follow up with recipients who have not responded. The user configures the event filters, survey form, initial survey timing, reminder limit, reminder mode, and reminder schedule.

The automation has two separate scheduling concepts:

Concept Meaning Where it is configured

Initial survey send	The first survey email sent to a new qualifying recipient. It can be sent immediately or on a selected schedule.	Survey Setup
Reminder send	Follow-up email sent only if the recipient has not responded within 24 hours of the initial survey or the previous reminder.	Reminders

Important: The initial survey schedule and the reminder schedule are independent. A recipient receives reminders only if they have not responded.

2. Five-Step Configuration Wizard

Step	Screen	What the user does
1	Basic Info	Name the automation, choose the Event object, and keep the configuration active.
2	Survey Setup	Select the survey form, the initial survey email template, and whether the initial survey sends instantly or on a schedule.
3	Reminders	Set the reminder limit, choose Live or Snapshot mode, select the reminder email template, and configure the recurring reminder schedule.
4	Conditions	Build the filter logic that determines which events trigger the survey. Users can also review the generated query.
5	Review	Confirm all settings and save the configuration.

Figure 2. New Configuration wizard overview.

3. Create the Event Record

The process starts with an event record. The automation can only find and process events that contain the information your conditions are looking for.

Field / Area	Why it matters
Assigned To	Identifies the owner or user responsible for the event.
Subject	Can be used in condition logic, such as Subject = 'Call'.
Name / Related To	Links the event to the relevant contact, account, case, or related record used by the survey process.
Start / End Date and Time	Defines when the event occurs.
Event Status	Can be used to filter which events qualify for the survey automation.

User tip: Before saving the event, confirm that the fields used by your automation conditions are filled in correctly.

The screenshot shows a 'Calendar Details' modal window. It contains the following fields and values:

- Assigned To:** Rohit Chowdhury
- Location:** (empty)
- Subject:** (empty)
- Start:** Date: Jun 3, 2026; Time: 6:30 PM
- End:** Date: Jun 3, 2026; Time: 6:30 PM
- Name:** Anika Chowdhury
- Related To:** Saleshub
- Contact Email:** (empty)
- All-Day Event:** ☐
- Event Status:** In Progress

Buttons at the bottom: Cancel, Save & New, Save.

Figure 3. Event creation screen.

4. Step 1 - Basic Info

In Basic Info, users name the automation and select the object it applies to. For this workflow, the automation applies to Event records.

Setting	Recommended value / guidance
Configuration Name	Use a clear name that explains the automation purpose, such as Testing Event or Event Survey Follow-up.
Object API Name	Select Event.
Active	Keep checked when the automation should run.
Description	Optional, but recommended for explaining the business purpose.

New Configuration

1 Basic Info (Name & object) — 2 Survey Setup (Form & schedule) — 3 Reminders (Limit & mode) — 4 Conditions (Filter logic) — 5 Review (Save changes)

1 Basic Information
Name your automation and choose the CASE and EVENT object it applies to.

*Configuration Name:

*Object API Name:

Description:

Order: ☒ Active

What is an Automation?
An automation monitors a Salesforce object for records that match your conditions. When a match is found, it automatically sends a survey to the related contact and optionally sends follow-up reminders until they respond.

Figure 4. Basic Info completed for an Event automation.

5. Step 2 - Survey Setup

Survey Setup controls the initial survey email: which survey is sent, which template is used, and when the first survey is delivered.

Initial send option	What it means	Best used when
Instant Send	The initial survey is sent as soon as a matching event is found.	Recipients should receive the survey immediately after qualification.
Scheduled Send	The initial survey is sent at the selected schedule. At each run, the system checks matching records and sends only to new recipients.	You want batch sending or a specific delivery time.

Reminder: This screen controls the first survey email only. Reminder emails are configured separately in the Reminders step.

The screenshot shows the 'New Configuration' dialog with the 'Survey Setup' step selected. The progress bar at the top indicates the following steps: 1. Basic Info (Name & object), 2. Survey Setup (Form & schedule), 3. Reminders (Limit & mode), 4. Conditions (Filter logic), and 5. Review (Save changes). The 'Survey Setup' section includes a 'Survey Form' dropdown set to 'NPS', a 'Survey Email Template' dropdown set to '-- Use Default NPS Template --', and a 'Schedule Survey Send' toggle switch that is turned on. A blue callout box on the right states 'Instant Send is active' with the text: 'Surveys are sent immediately whenever a record matches this condition — no delay, no batching. Toggle the switch to use a scheduled send instead.' At the bottom, there are 'Cancel', '< Back', and 'Next >' buttons.

Figure 5. Survey Setup with Instant Send active.

This screenshot shows the same 'New Configuration' dialog, 'Survey Setup' step, but with the 'Scheduled Send' toggle switch turned on. The 'Survey Form' and 'Survey Email Template' dropdowns remain the same. A yellow callout box on the right states 'Scheduled Send is active' with the text: 'New matching records are never sent instantly. At every scheduled run the system checks all matching records and sends only to new recipients.' Below this, an orange warning box says: 'Save your schedule at least 15 minutes before your intended send time.' The 'Frequency' section is now visible, featuring a 'Select frequency...' dropdown, and 'Hour' and 'Minute' dropdowns set to 'Hour...' and '00' respectively. The 'Schedule Survey Send' toggle is now checked with a blue checkmark, and the text below it reads 'Scheduled — surveys send on your chosen schedule'. The bottom navigation buttons are 'Cancel', '< Back', and 'Next >'.

Figure 6. Survey Setup with Scheduled Send active.

New Configuration

Basic Info Name & object — 2 Survey Setup Form & schedule — 3 Reminders Limit & mode — 4 Conditions Filter logic — 5 Review Save changes

Survey Name: NPS

Survey Email Template: -- Use Default NPS Template --

Used for the: Initial survey send. Leave blank to use the default NPS Survey template.

Schedule Survey Send: ☒ Scheduled -- surveys send on your chosen schedule

Scheduled Send is active
New matching records are never sent instantly. At every scheduled run the system checks all matching records and sends only to new recipients.

Save your schedule at least 15 minutes before your intended send time.

Active: Every day at 12:00 AM

Frequency: Daily -- runs every day at the chosen time

Hour: 12:00 AM Minute: 00

Will send: Every day at 12:00 AM

Cancel < Back Next >

Figure 7. Scheduled Send example: daily at 12:00 AM.

6. Step 3 - Reminder Setup

Reminder Setup controls follow-up emails. A reminder is sent only if the recipient has not responded within 24 hours of the initial survey or the previous reminder.

Reminder Timing Rule

A reminder becomes eligible only after 24 hours with no response.



Example: If Reminder Limit = 2, the recipient can receive Reminder 1 after the first 24-hour no-response window, and Reminder 2 after the second 24-hour no-response window. If the recipient responds at any point, no further reminders are sent.

Figure 8. Reminder timing rule: 24-hour no-response window.

Setting	Business meaning
Reminder Limit	The maximum number of reminder emails a non-responder can receive for a survey. If the limit is 1, only Reminder 1 can be sent. If the limit is 2, Reminder 1 and Reminder 2 can be sent.
Reminder Mode	Defines whether the latest reminder limit applies to existing eligible events, or whether each event keeps the limit captured when the survey was first sent.
Reminder Email Template	The template used for reminder emails. The system automatically prefixes reminder subjects, such as Reminder 1 - [template subject].
Recurring Reminder Schedule	Determines when the reminder job runs. It is separate from the initial survey schedule.

Note: Schedule the recurring reminder run for at least 15 minutes after the initial survey send time. Since a reminder is only eligible 24 hours after the initial survey (or the previous reminder), a recurring reminder schedule set too close to the initial send time can cause the first reminder check to miss that day's newly qualified recipients.

New Configuration

Progress: 1 Basic Info (Name & object) — 2 Survey Setup (Form & schedule) — **3 Reminders (Limit & mode)** — 4 Conditions (Filter logic) — 5 Review (Save changes)

Reminder Limit

2

Max 2 reminder emails per recipient. Stops even if they haven't responded.

Reminder Mode

Live — always use current config limit

Live — always use current config limit

Snapshot — save limit per record at send time

time the scheduler runs. If you change the limit from 2 to 3, all existing pending records immediately get 3 reminders. If you lower it from 3 to 2, records that already got 2 reminders stop immediately.

Example: You set limit = 2. Later change to 3 → older records that already received 2 reminders will now get a 3rd.

Email Subject Preview

Each reminder gets an automatic sequential prefix:

- #1 Reminder 1 - [your template subject]
- #2 Reminder 2 - [your template subject]

☐ Set Recurring Reminder Schedule

Reminder Email Template

Cancel Back Next

Figure 9. Reminder Mode selection: Live or Snapshot.

7. Live Mode vs Snapshot Mode

Live Mode and Snapshot Mode answer one important question: what happens when the reminder limit changes after some surveys have already been sent?

Live Mode vs Snapshot Mode

How a change to the reminder limit affects existing and new events.



Figure 10. Live Mode and Snapshot Mode examples.

Mode	Business rule	Effect when limit changes
------	---------------	---------------------------

- Live Mode

Always use the current reminder limit in the configuration.

Existing eligible events that have not responded can receive reminders up to the latest limit.
- Snapshot Mode

Save the reminder limit to each event when the initial survey is sent.

Older events keep their original reminder limit. New/current events use the updated limit.

Live Mode example using Events A, B, and C: Event A received the initial survey on April 27 with reminder limit 1. Event B received the initial survey on May 10 with reminder limit 2. Event C received the initial survey on June 1 when the limit is 3. If Live Mode is selected and the current limit is 3, Event A can receive 2 more reminder emails, Event B can receive 1 more reminder email, and Event C can receive up to 3 reminders if the recipient has not responded.

Snapshot Mode example using Events D and E: Event D is created when the reminder limit

is 2, so it can receive only Reminder 1 and Reminder 2. Event E is created after the limit changes to 3, so it can receive Reminder 1, Reminder 2, and Reminder 3. Older events are not affected by later limit changes.

The screenshot shows the 'New Configuration' form for Reminders. The progress bar at the top indicates the current step is 'Reminders' (3), with previous steps 'Basic Info' (1) and 'Survey Setup' (2) completed, and 'Conditions' (4) and 'Review' (5) pending. The 'Snapshot Mode' section is active, explaining that the reminder limit is saved to each record at the time the initial survey is sent. An example states: 'Example: 5 records matched when limit = 2. You later change to 3 → those 5 records still only get 2 reminders. New records get 3.' The 'Recurring Reminders active' section is also visible, showing the schedule 'Active: Every day at 1:00 AM' and 'Frequency: Daily — runs every day at the chosen time'. The 'Reminder Email Template' is set to 'Client Scope'. The 'Will run: Every day at 1:00 AM' status is shown at the bottom.

Figure 11. Live Mode with recurring reminders enabled.

The screenshot shows the 'New Configuration' form for Reminders in Snapshot Mode. The progress bar at the top indicates the current step is 'Reminders' (3), with previous steps 'Basic Info' (1) and 'Survey Setup' (2) completed, and 'Conditions' (4) and 'Review' (5) pending. The 'Live Mode' section is active, explaining that the reminder limit is always read from the current configuration value at the time the scheduler runs. An example states: 'Example: You set limit = 2. Later change to 3 → older records that already received 2 reminders will now get a 3rd.' The 'Recurring Reminders active' section is also visible, showing the schedule 'Active: Every day at 1:00 AM' and 'Frequency: Daily — runs every day at the chosen time'. The 'Reminder Email Template' is set to 'Use Survey Template --'. The 'Will run: Every day at 1:00 AM' status is shown at the bottom.

Figure 12. Snapshot Mode with recurring reminders enabled.

8. Step 4 - Conditions

Conditions define which events trigger the automation. This is an advanced feature because users can both build conditions visually and review the generated query/filter logic.

Field on screen	What the user does
Field	Select the event field to evaluate.
Operator	Choose how the field should be compared, such as Equals (=).
Value	Enter the value that must match.
Logical Operator	Choose how this condition connects to the next condition, such as AND.
Generated Condition Logic	Review or edit the generated query/filter logic.
Preview Matching Records	Check which records match the condition before saving.

Example: A condition such as Subject = 'Call' means the automation looks for events where the Subject field equals Call.

Figure 13. Conditions screen with Visual Query Builder and generated filter logic.

9. Step 5 - Review and Save

The Review step summarizes the configuration before it is saved. Users should confirm each section before clicking Save Configuration.

Review section	Confirm that
Basic Information	The automation name, object, and active status are correct.
Survey Setup	The selected survey, send mode, and initial survey schedule are correct.
Reminder Setup	The reminder limit, reminder mode, reminder template, and reminder schedule are correct.
Condition Logic	The query/filter logic matches the events that should trigger the automation.

New Configuration

Basic Info — Survey Setup — Reminders — Conditions — **Review**

Review & Save
Review your configuration before saving. Click any section to go back and edit.

Basic Information

Name: Testing Event

Object: Event

Status: Active

Survey Setup

Survey Form: NPS

Send Mode: Scheduled

Schedule: Every day at 12:00 AM

Reminder Setup

Reminder Limit: 2 reminders

Cancel Back Save Configuration

Figure 14. Review & Save summary screen.

New Configuration

Basic Info — Survey Setup — Reminders — Conditions — **Review**

Object: Event

Status: Active

Send Mode: Scheduled

Schedule: Every day at 12:00 AM

Reminder Setup

Reminder Limit: 2 reminders

Reminder Mode: Snapshot

Reminder Schedule: Every day at 1:00 AM

Condition Logic

Subject = 'Call'

Cancel Back Save Configuration

Figure 15. Review screen showing Reminder Setup and Condition Logic.

Final step: When the setup looks correct, click Save Configuration. Once saved, the automation starts watching matching events and follows the survey and reminder rules.

10. Common Scenarios

Scenario	Recommended setting	Why
Send surveys immediately after a qualifying event	Instant Send	The initial survey goes out as soon as the event qualifies.
Send surveys in batches at a predictable time	Scheduled Send	The system checks new matching events at the scheduled run time.
Apply a new reminder limit to older pending events	Live Mode	Existing eligible non-responders follow the latest reminder limit.
Keep older events locked to the reminder limit they started with	Snapshot Mode	Each event preserves its reminder limit from the time its survey was first sent.
Avoid sending reminders after a response	No extra setup needed	The system sends reminders only to non-responders.

11. Quick FAQ

When does a recipient get a reminder?

Only after they have not responded within 24 hours of the initial survey or previous reminder, and only if the reminder limit has not been reached.

Does the reminder schedule control the initial survey send?

No. The initial survey schedule is configured in Survey Setup. The reminder schedule is configured in Reminders.

What happens if a recipient responds after Reminder 1?

No more reminder emails are sent to that recipient for that survey.

What happens if the reminder limit is lowered in Live Mode?

Existing eligible records follow the current lower limit. If a record has already reached the new limit, it stops receiving reminders.

Can users review the generated query/filter logic?

Yes. The Conditions step displays generated condition logic and allows users to review it as part of this advanced feature.

Support note: If additional screenshots are added later, place them in the relevant step and keep the same figure-caption format so the guide stays easy to follow.

13. Recipient Inbox Examples

The following screens show how the automation appears from the recipient's point of view. These examples help business users validate the email content, subject line format, and reminder sequencing.

13.1 Initial Survey Email

This is the first survey email the recipient receives after a qualifying event triggers the automation and the initial survey is sent.

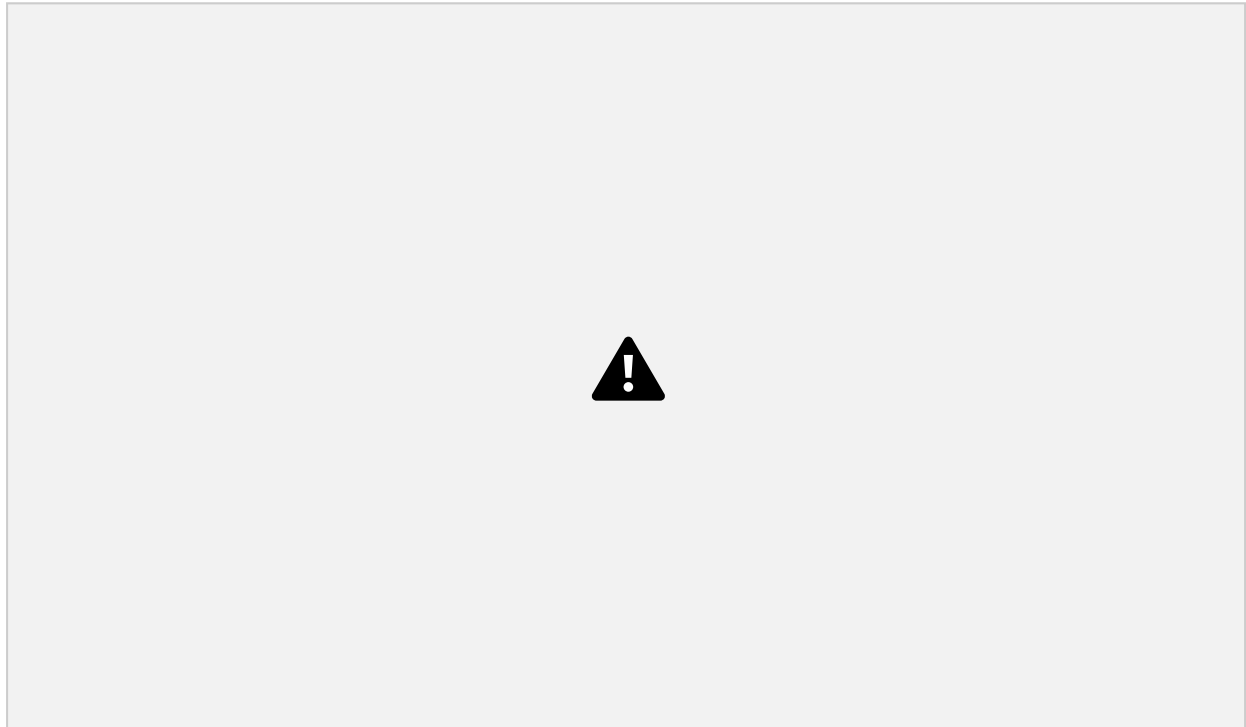


Figure 17. Initial survey email as seen in the recipient inbox.



Figure 18. Reminder 1 email as seen in the recipient inbox.

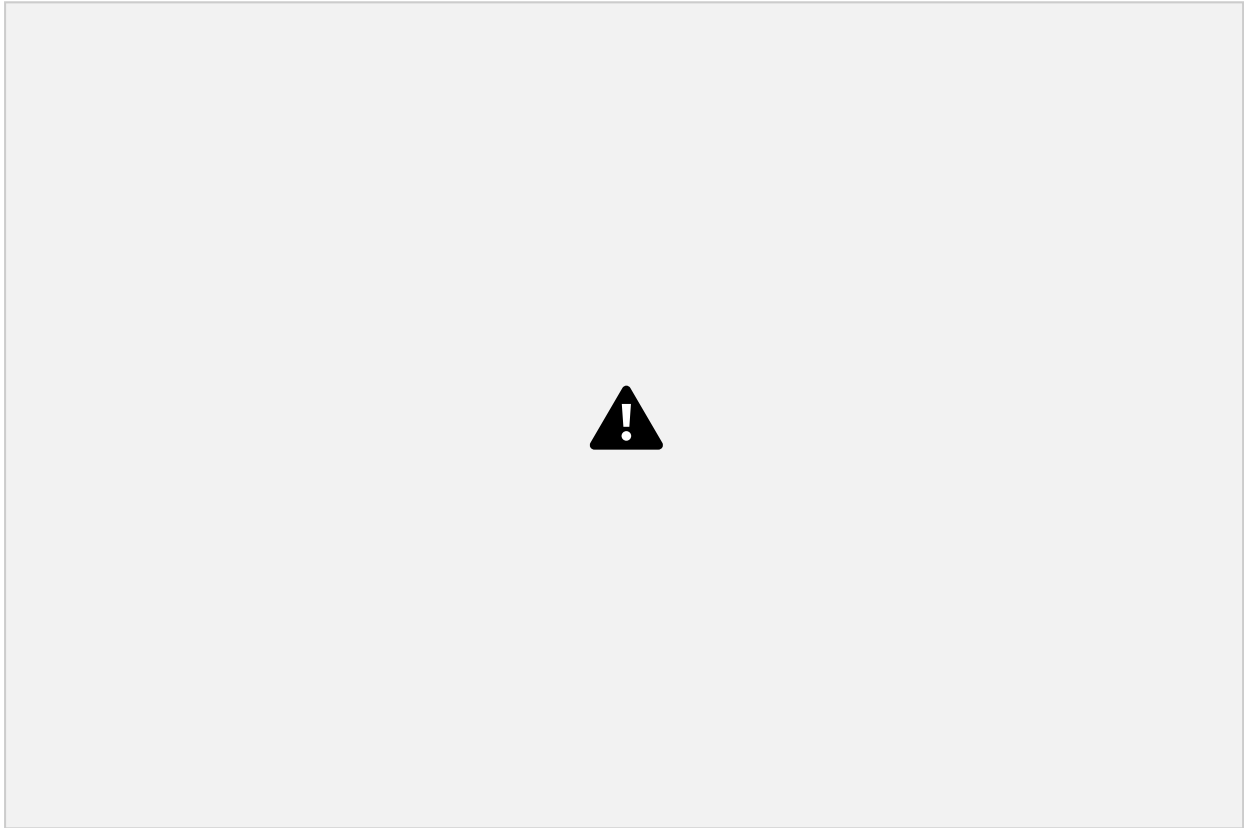


Figure 19. Reminder 2 email as seen in the recipient inbox.

13.2 What to look for

- The initial survey email should show the expected message and survey call-to-action button.
- Reminder emails should clearly indicate the reminder sequence in the subject line, such as Reminder 1 and Reminder 2.
- The reminder content should stay consistent while following the configured 24-hour no-response rule.
- Once the recipient responds, no further reminder emails should be sent.