



Configuring the Static CSAT Survey Form

This document explains how to configure and send the Static CSAT (Customer Satisfaction) Survey form by setting the sending condition in Salesforce Custom Settings.

Overview

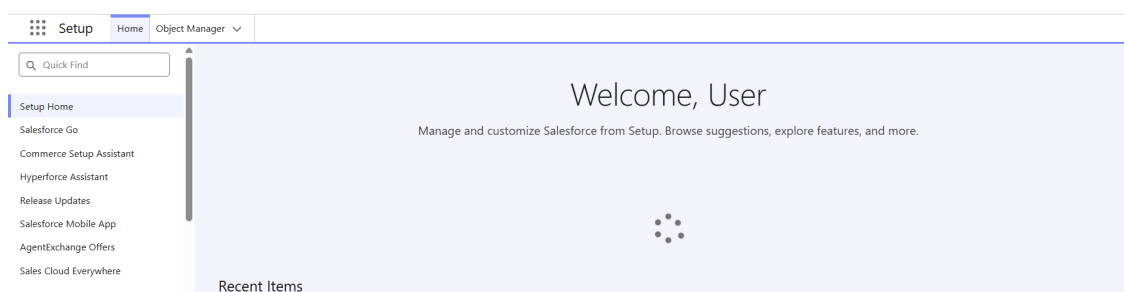
The Static CSAT Survey is sent automatically when a record meets the condition defined in the "Condition For Static Survey" field of the Custom Setting. By defining a condition (for example, when a Case is closed), you control exactly when the survey is delivered to the customer.

Prerequisites

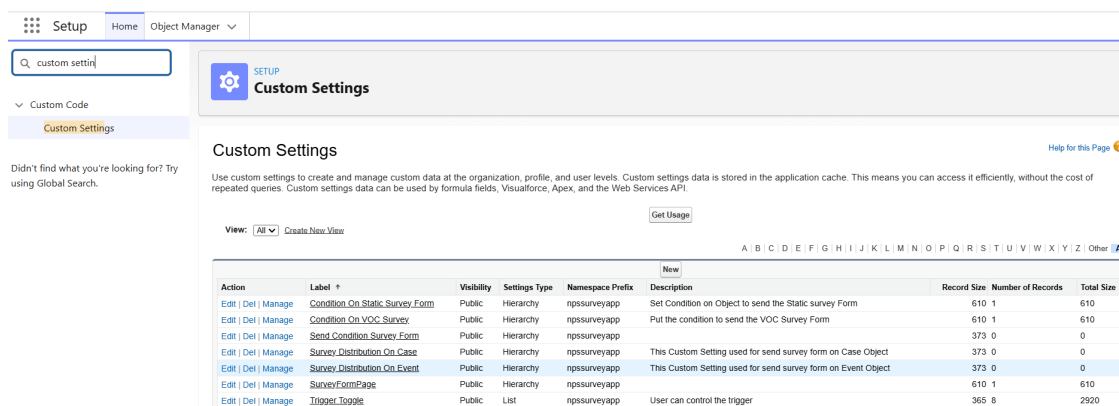
- Access to Salesforce Setup (System Administrator or equivalent permissions).
- Permission to view and manage Custom Settings.
- Knowledge of the object and field API names you want to use in the condition (e.g., the Status field on the Case object).

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.





3. In the list of Custom Settings, search for **Condition on Static Survey Form**.

Setup Home Object Manager

Q custom setting

Custom Code

Custom Settings

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

Custom Settings

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

Action	Label *	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Edit Del Manage	Condition On Static Survey Form	Public	Hierarchy	npssurveyapp	Set Condition on Object to send the Static survey Form	610	1	610
Edit Del Manage	Condition On VOC Survey	Public	Hierarchy	npssurveyapp	Put the condition to send the VOC Survey Form	610	1	610
Edit Del Manage	Send Condition Survey Form	Public	Hierarchy	npssurveyapp		373	0	0

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

Setup Home Object Manager

Q custom setting

Custom Code

Custom Settings

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

Custom Settings

Condition On Static Survey Form

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.

Edit Delete

▼ Default Organization Level Value

Location	CSAT Survey URL
Saleshub	https://enterprise-saas-1574-dev-ed.scratch.my...

Condition For Static Survey

View: All Create New View

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

Setup Home Object Manager

Q custom setting

Custom Code

Custom Settings

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

Custom Settings

Condition On Static Survey Form Edit

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

Edit Condition On Static Survey Form Save Cancel

Condition On Static Survey Form Information

Location	CSAT Survey URL
Saleshub	https://enterprise-saas-1574-

Condition For Static Survey



6. Enter your condition in the **Condition For Static Survey** field.

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

Example Condition

To send the survey when a Case is closed, enter the following condition:

Status = 'Closed'

With this condition in place, the Static CSAT Survey form is sent whenever a Case record's Status changes to "Closed".

Notes and Best Practices

- Use the correct field API name and enclose text values in single quotes (e.g., Status = 'Closed').
- Verify the condition matches a valid field on the target object (e.g., Case).
- Test the configuration in a sandbox before deploying to production: close a test Case 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.