

NPS Summary Chart

Salesforce Report — Step-by-Step Setup Guide

Overview

This document provides a step-by-step guide to configure the NPS Summary Chart report in Salesforce. The report is built on the Response object (npssurveyapp__Response__c) and displays key NPS metrics grouped by Survey Form.

Report Name	Detail
Report Name	NPS Summary Chart
Report Type	Summary Report
Primary Object	npssurveyapp__Response__c (Response)
Group By	Survey Form

Columns in the Report

The report includes the following columns:

Column	Source	Type
Survey Form Id	LEFT(Survey_Form__c, 18)	Formula Field (to be created)
Survey Form Name	Survey Form > Name	Standard Lookup Field
Number of Responders	Record Count	Built-in Count
Promoter Count	SUM(Promoter__c)	Summary Formula
Promoter %	Promoter / Responders × 100	Summary Formula
Detractor Count	SUM(Detractor__c)	Summary Formula
Detractor %	Detractor / Responders × 100	Summary Formula

Passive Count	SUM(Passive__c)	Summary Formula
Passive %	Passive / Responders × 100	Summary Formula

 Total Survey Sent and Responder % cannot be sourced from the Response object alone — only responded records exist here. Those columns require a Joined Report with the Survey Recipient object. See Section 6 for details.

Step 1 — Open the Existing Report

Navigate to the NPS Summary Chart report in Salesforce.

1. Go to the App Launcher and open Reports.
2. Search for NPS Summary Report in the search bar.
3. Click on the report name to open it.
4. Click Edit to enter Edit mode.

Step 2 — Add Survey Form Id Column

When you search for Survey Form in the Fields panel, only one field appears — Survey Form — which displays the Survey Form Name, not the ID.

This is because Salesforce Lookup fields display the related record Name by default in reports. The raw ID is not exposed as a separate column.

 Searching 'Survey Form' in the Fields panel shows only 1 result — the Name field. Survey Form ID is not natively available as a separate report column.

Solution — Create a Formula Field on Response Object

To display the raw Survey Form ID in the report, create a Formula field on the Response object:

Setting	Value
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Object	npssurveyapp__Response__c (Response)
Field Label	Survey Form Id
Field API Name	Survey_Form_Id__c
Field Type	Formula
Return Type	Text
Formula	LEFT(npssurveyapp__Survey_Form__c, 18)

Why LEFT(..., 18)?

The lookup field npssurveyapp__Survey_Form__c stores the 18-character Salesforce Record ID internally. Using LEFT() forces Salesforce to return it as a plain text string — without this, the report resolves the lookup and displays the Name instead of the ID.

```
LEFT(npssurveyapp__Survey_Form__c, 18)
```

Steps to Create the Formula Field

1. Go to Setup → Object Manager → Response.
2. Click Fields & Relationships → New.
3. Select Formula as the field type → Click Next.
4. Enter Field Label: Survey Form Id.
5. Select Return Type: Text.
6. Enter the formula: LEFT(npssurveyapp__Survey_Form__c, 18)
7. Click Next → Next → Save.

✓ Once the field is created, search for 'Survey Form Id' in the report Fields panel — it will now appear as a regular text column showing the raw 18-character ID.

Step 3 — Group Report by Survey Form

To get aggregated metrics per Survey Form, the report must be grouped by Survey Form.

1. In the report editor, locate the Group Rows section.

2. Drag the Survey Form field into Group Rows.
3. This will group all Response records under their respective Survey Form.

 If the report is already grouped by Survey Form, skip this step.

Step 4 — Add Count of Responders

The total number of Response records per Survey Form serves as the Responder Count.

1. In the report editor, look at the bottom summary row.
2. Salesforce automatically includes Record Count when you group records.
3. Rename the column label to Number of Responders for clarity:

Click the column header → Edit Column
Change Display Name to: Number of Responders

Step 5 — Add Summary Formulas

Summary Formulas calculate aggregated metrics at the group level. Add the following formulas one by one.

How to add a Summary Formula:

1. In the report editor, click Add Summary Formula (usually at the top of the Columns panel or in the Fields area).
2. Enter the formula name, the formula expression, and set the Format.
3. Click Apply, then repeat for each formula below.

Promoter Count

Formula Name
Promoter Count

Format	Number, 0 decimal places
---------------	--------------------------

```
SUM(npssurveyapp__Response__c.npssurveyapp__Promoter__c)
```

Promoter %

Formula Name	Promoter %
---------------------	------------

Format	Percent, 1 decimal place
---------------	--------------------------

```
IF(RECORD_COUNT > 0,
  SUM(npssurveyapp__Response__c.npssurveyapp__Promoter__c) / RECORD_COUNT * 100,
  0)
```

Detractor Count

Formula Name	Detractor Count
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Format	Number, 0 decimal places
---------------	--------------------------

```
SUM(npssurveyapp__Response__c.npssurveyapp__Detractor__c)
```

Detractor %

Formula Name	Detractor %
---------------------	-------------

Format	Percent, 1 decimal place
---------------	--------------------------

```
IF (RECORD_COUNT > 0,  
    SUM(npssurveyapp__Response__c.npssurveyapp__Detractor__c) / RECORD_COUNT * 100,  
    0)
```

Passive Count

Formula Name	Passive Count
--------------	---------------

Format	Number, 0 decimal places
--------	--------------------------

```
SUM(npssurveyapp__Response__c.npssurveyapp__Passive__c)
```

Passive %

Formula Name	Passive %
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Format	Percent, 1 decimal place
--------	--------------------------

```
IF (RECORD_COUNT > 0,  
    SUM(npssurveyapp__Response__c.npssurveyapp__Passive__c) / RECORD_COUNT * 100,  
    0)
```

Step 6 — Save the Report

Once all columns and summary formulas are added:

4. Click Save & Run at the top right of the report editor.
5. Confirm the report name remains NPS Summary Chart.
6. Verify all columns are visible in the report output.

✓ Run the report in Preview mode first before saving to verify all formulas return the expected values.

Final Column Reference

Summary of all columns configured in the NPS Summary Chart report:

Column	How to Add	Format
Survey Form Id	Formula field LEFT(Survey_Form__c, 18) → drag from Fields panel	Text (18-char ID)
Survey Form Name	Drag from Fields panel > Survey Form	Text (hyperlink)
Number of Responders	Record Count (auto-generated)	Number
Promoter Count	Summary Formula	Number
Promoter %	Summary Formula	Percent
Detractor Count	Summary Formula	Number
Detractor %	Summary Formula	Percent
Passive Count	Summary Formula	Number
Passive %	Summary Formula	Percent

Note — Total Survey Sent & Responder %

These two columns cannot be built from the Response object alone because:

- The Response object only contains records where a survey was actually answered.
- Surveys that were sent but not responded to have no Response record.
- Total Survey Sent lives on the Survey Recipient or Survey Distribution object.

To include Total Survey Sent and Responder %, a Joined Report is required:

Block	Object & Field
Block 1	Survey Recipient — COUNT of records (= Total Sent)

Block 2	Response — all metrics from this guide
Join Key	Survey Form (common field across both objects)

Responder % formula in a Joined Report:

```
Number of Responders / Total Survey Sent * 100
```

 Joined Reports in Salesforce require the Joined Report feature to be enabled in your org. Contact your Administrator if it is not available.