Enhance Your Customer Experience with Salesforce Feedback Management

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@salesforcedocs
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SALESFORCE FEEDBACK MANAGEMENT

Understand customer feedback as it evolves over time by engaging customers and users with relevant, personalized surveys. Incorporate survey data into your feedback management process and gain actionable insights at every stage of the customer lifecycle.

Create engaging, personalized surveys with an easy-to-use, flexible editor. Use different types of questions to gather the data that best suits your needs, and specify the responses that participants can select.

Survey responses are mapped to customer records in your org. Use Salesforce to export survey data, create reports and dashboards, and share insights with your company.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Compare the Supported Capabilities for Each License

Understand the capabilities provided in the three Salesforce Feedback Management licenses so that you get the right license for your business requirements.

Set Up Salesforce Feedback Management

Enable Salesforce Feedback Management in your org and configure it based on your requirements. Give users permission to create and share surveys, to view survey records, and respond to surveys. Add related lists and Lightning components that help track surveys, survey invitations, and survey responses. Analyze survey responses with custom report types.

Create and Customize Surveys

Use a wide range of question types to engage participants. Create, copy, and manage surveys across versions. Personalize survey pages and survey questions to increase participant engagement. Allow participants to view survey pages and questions based on their previous responses. Customize the look and feel of your surveys to fit your company's brand. Design surveys to personalize your participants' experience. Gather feedback from a global audience by translating surveys.

Distribute Surveys

Generate different types of survey invitations and distribute them in a way that best suits your participants' needs. You can generate individual invitations, send invitations by email, or automate the distribution process.

Share and Relate Survey Records

Enable users to view their survey invitations and responses by sharing those records. Check the users who have access to survey records. Relate Salesforce records to survey invitation records.

Track Satisfaction Across a Customer's Lifecycle

Understand how participants feel about your company, product, or service throughout their customer journey by tracking satisfaction metrics with Customer Lifecycle Maps.

Analyze Survey Responses

Gain insights into responses by using the Analyze tab in the Survey Builder to view and export response data.

Analyze Survey Responses to Get Sentiment Insights

Get insight into the sentiment behind text-based survey responses. Create an AWS account and enable Sentiment Insights. Then create a data map and then use a Flow action or template to analyze the sentiment that underlies survey responses.

Deploy and Use Customer Lifecycle Analytics

Customer Lifecycle Analytics lets you surface survey response metrics anywhere in Salesforce and get instant insight into your customer right from where you work.

Surveys FAQs
Get answers to common questions about Salesforce Feedback Management.

Surveys Resources
Check out these resources to learn more about how to best use Salesforce Feedback Management.

Compare the Supported Capabilities for Each License

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Understand the capabilities provided in the three Salesforce Feedback Management licenses so that you get the right license for your business requirements.

Salesforce Feedback Management is available with these licenses.

- Survey Response Pack
- Feedback Management - Starter
- Feedback Management - Growth

Use the table to see which capabilities are available with each license, and to understand the benefit of each feature.

Capability	Benefit	Survey Response Pack	Feedback Management	
			Starter	Growth
Create surveys with basic survey questions	Use a wide range of question types to keep your participants engaged.	Yes	Yes	Yes
Apply branching logic	Decide which page participants view next based on their previous responses.	Yes	Yes	Yes
Embed a question in email	Embed a question of the type Like or Dislike, Net Promoter Score (NPS), Rating, or Score in your survey invitation email.	Yes	Yes	Yes
Send survey invitation by using the flow builder	Use flows to send survey invitations to leads, contacts, and your Salesforce users.	Yes	Yes	Yes
Configure the supported survey languages	Customize the survey based on language preference of the participants.	Yes	Yes	Yes
Receive responses	Receive responses during the entire license agreement period so that you can track the number	1,000 per pack	100,000 responses. Get more responses with	Unlimited

Capability	Benefit	Survey Response Pack	Feedback Management	
			Starter	Growth
	of responses received by your Salesforce org. Note: Your Salesforce edition determines the limits on survey responses, survey invitations, and other Survey objects.		additional response packs.	
Add an attachment question to the survey	Let participants add attachments such as documents, images, and spreadsheets.	No	Yes	Yes
Use merge fields	Add merge fields in your surveys to provide participants a personalized experience. Merge fields resolve information that's already available in your Salesforce org.	No	Yes	Yes
Create page branching logic based on merge fields	Use merge fields to define page branching logic. Create conditions that decide which survey pages participants can view based on the information that a merge field resolves.	No	Yes	Yes
Create or update records based on participant responses	Create or update records in your Salesforce org based on participant responses. Configure survey data maps to either map participant responses to object fields or populate fields with custom values. You can also map fields with information from the record associated with the invitation.	No	Yes	Yes
Gather post-chat feedback	Lets customers respond to a survey in the chat window at the end of a chat session on a website or on an Experience Cloud site.	No	Yes, for Experience Cloud sites only	Yes
Embed a survey in a webpage	Embed a survey in a webpage to allow visitors to respond to the survey.	No	Yes, for Experience Cloud sites only	Yes
Track surveys sent across customer lifecycle	Use Customer Lifecycle Maps to define the stages in a customer's lifecycle and add survey questions for each stage. Define whether the map is used to track NPS or the customer's satisfaction score. To gather actionable insights on these scores, use Customer Lifecycle Analytics.	No	No	Yes

Capability	Benefit	Survey Response Pack	Feedback Management	
			Starter	Growth
Use Customer Lifecycle Analytics	Use the Customer Lifecycle Analytics template to create your own apps and analyze the survey responses of your customers and employees.	Yes, as an add-on license	Yes, five user licenses	Yes, five user licenses

SEE ALSO:

Assign Permission Sets to a Single User

User Permissions

Set Up Salesforce Feedback Management

Enable Salesforce Feedback Management in your org and configure it based on your requirements. Give users permission to create and share surveys, to view survey records, and respond to surveys. Add related lists and Lightning components that help track surveys, survey invitations, and survey responses. Analyze survey responses with custom report types.

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Enable Surveys and Configure Survey Settings

Allow your users to create surveys and send them to participants by enabling the feature in Setup.

Assign Permissions for Salesforce Feedback Management

Assign the required permissions for users to create, send, respond to, and translate surveys.

Add Survey Related Lists and Lightning Components to Record Pages

Customize the record detail pages for objects commonly used with surveys so that users can easily find invitations and responses, and work efficiently with surveys.

Encrypt Survey Fields

Protect sensitive participant data collected in Surveys with Shield Encryption and meet regulatory compliance mandates. Encrypt data from Salesforce users, including administrators.

Send Surveys to a Different Salesforce Org

Use package to transfer your survey records from one Salesforce org to another, such as sending a test survey from a sandbox org to a production org.

Create Custom Report Types to View Survey Data

Create a custom report type so that you can generate reports that provide insight on your survey data.

View the Usage of Survey Responses

See your survey response usage in the Usage-based Entitlements list.

Enable Surveys and Configure Survey Settings

Allow your users to create surveys and send them to participants by enabling the feature in Setup.

1. From Setup, in the Quick Find box, enter `Survey`, then select **Survey**, and then select **Survey Settings**.
2. Enable Surveys.

   When you enable Surveys, the Customer Satisfaction and Net Promoter Score sample surveys are added to your Salesforce org. These surveys help you understand how to create a survey for your org. To reuse these surveys for your org, you can create a copy.
3. To create surveys that are available to Experience Cloud site users and external unauthenticated users, select a community.
4. To allow survey owners manage and export survey responses, enable Survey Owners Can Manage Responses.
5. To track surveys that are sent across customers' lifecycle, enable Customer Lifecycle Maps.

   Note: Customer Lifecycle Maps is available only with the Feedback Management - Growth license.

Assign the required permission set to the System Administrator profile.

SEE ALSO:

Customize the Survey Invitation Email Templates

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USER PERMISSIONS

To enable Surveys:
- System Administrator profile

Assign Permissions for Salesforce Feedback Management

Assign the required permissions for users to create, send, respond to, and translate surveys.

Assigning permissions entails assigning user permissions for people in your Salesforce Feedback Management org, and then assigning additional perms for different categories of users:

- People in the org who create and send surveys
- People in the org who respond to surveys, and
- People who respond to surveys as guest users on an Experience Cloud site

You can also assign permissions for users in your org who need to translate surveys into different languages.

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Assign User Permissions
Give users permission to access Salesforce Feedback Management.

Assign Permissions to Create and Send Surveys
Give your users the user and object permissions they need to create and send surveys.

Assign Permissions to Respond to Surveys
Give your users the object permissions they need to respond to surveys.

Assign Permissions to Guest Users to Respond to Surveys
Give guest users on Aura or Visualforce sites in Experience Cloud the object permissions they need to respond to unauthorized surveys sent to surveys to contacts and leads.

[Assign Permissions to Translate Surveys](#)
Give your users the permissions they need to translate surveys in other languages.

Assign User Permissions

Give users permission to access Salesforce Feedback Management.

License	User Permission
Salesforce Feedback Management - Starter	Salesforce Advanced Features Starter
Salesforce Feedback Management - Growth	Salesforce Surveys Advanced Features

Assign these user permissions on the System Permissions page of a new or cloned permission set or profile.

Note: There are no user permissions required for the Survey Response Pack license.

SEE ALSO:

User Permissions

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USER PERMISSIONS

To assign user permissions:
- System Administrator profile

Assign Permissions to Create and Send Surveys

Give your users the user and object permissions they need to create and send surveys.

Several profiles included with Salesforce Feedback Management enable these permissions by default. If you're using a custom profile, however, you need to set the user and object permissions manually.

User Permission	Object Access
View Setup and Configuration	Surveys, Survey Invitations, Survey Responses, and Survey Subjects: Read, Create, Edit, and Delete access

SEE ALSO:

Profiles

User Permissions

Object Permissions

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USER PERMISSIONS

To give users permissions to create and send surveys:
- System Administrator profile

Assign Permissions to Respond to Surveys

Give your users the object permissions they need to respond to surveys.

Object	Permissions
Surveys	Read
Survey Invitations	Read
Survey Responses	Read AND Create

SEE ALSO:

Object Permissions

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

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USER PERMISSIONS

To give users permissions to respond to surveys:

- System Administrator profile

Assign Permissions to Guest Users to Respond to Surveys

Give guest users on Aura or Visualforce sites in Experience Cloud the object permissions they need to respond to unauthorized surveys sent to surveys to contacts and leads.

Note: Surveys are unsupported for LWR sites in Experience Cloud.

1. From Setup, enter `Survey` in the Quick Find box, then select **Survey Settings**.
2. Make note of the Experience Cloud site that's selected as the default site to create public survey invitations.
3. Enter `Sites` in the Quick Find box, then select **All Sites**.
4. Open Experience Builder for the default site.
5. In Experience Builder, click , and select **General**.
6. Click the profile name under Guest User Profile.
7. Click Object Settings and give the guest user profile these permissions.

Object	Permissions
Surveys	Read
Survey Invitations	Read
Survey Responses	Read AND Create

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USER PERMISSIONS

To give guest users permissions to respond to surveys:

- Customize Application

Object	Permissions
Contacts	Read
Leads	Read

8. Click **Save**.

Assign Permissions to Translate Surveys

Give your users the permissions they need to translate surveys in other languages.

To allow users to translate surveys into other languages, give them these permissions.

- Permission to translate in one or more languages using the Translation Workbench.
- Read permission on the Surveys object.

To allow translators to translate surveys in end-user languages or platform-only languages, enable them.

SEE ALSO:

Translate Surveys
Translation Workbench
Object Permissions
Select Languages for Your Org

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USER PERMISSIONS

To give users permissions to translate surveys:

- System Administrator profile

Add Survey Related Lists and Lightning Components to Record Pages

Customize the record detail pages for objects commonly used with surveys so that users can easily find invitations and responses, and work efficiently with surveys.

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USER PERMISSIONS

To assign permission sets:
- System administrator profile

Add the Survey Invitations and Responses Related List to Object Record Pages

Use the Survey Invitations and Responses related list to view the survey invitations and responses related to an object's records. You can add the related list to the record detail pages of any object that Survey Subjects supports.

Add the Survey Invitations Related List to Standard Object Record Pages

Use the Survey Invitations related list to view the surveys a contact, person account, lead, or user is invited to take. The related list populates invitations related to a participant.

Add a Survey to Any Lightning Record Page

Use the Surveys component to add surveys to object records that support Lightning components. Your users can respond to the survey from the record page. You can also add the Surveys component to Experience Cloud sites to gather responses from guest users.

Add Topics to Survey Records

Use the Topics component to add themes to Survey, Survey Question, Survey Question Choice, and Survey Question Response records. You can analyze trending topics and learn how different areas of your business are performing in the Topic Analysis dashboard in Customer Lifecycle Analytics.

Add the Survey Invitations and Responses Related List to Object Record Pages

Use the Survey Invitations and Responses related list to view the survey invitations and responses related to an object's records. You can add the related list to the record detail pages of any object that Survey Subjects supports.

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USER PERMISSIONS

To add a related list:
- System Administrator profile

1. From Setup, in Object Manager, select the object to which you want to add the related list.
2. Click **Page Layouts** and select the page layout that you want to add the related list to.
3. In the Layout panel, click **Related Lists**.
4. Drag the **Survey Invitations and Responses** related list onto the page layout.
5. Click for the Survey Invitations and Responses related list.
6. In the Related List Properties dialog box, select the fields to display in the related list and the order in which the fields appear.

   Note: To see survey invitation and survey response fields in the Related List Properties dialog box, the survey invitation and survey response records must be related to the survey subject records.

7. Click **OK**, and save your changes

   Note: If you use Support Settings or Case Auto-Response Rules to email survey invitations, survey invitations are related to the case records. You can view the survey invitations after you add the related list to Case object's page layout. You can use the related list to track invitations that a process emails. The invitation is related to the record that triggers the email.

To view responses from a participant, click ▼ in a related list row, and select **View Responses**. You can't view the responses if an invitation receives more than one response.

SEE ALSO:

Relate Records to Survey Invitations and Responses

Generate Survey Invitations for Contacts, Person Accounts, and Leads

Considerations for Sending Email Invitations to Gather Feedback on Support Cases

Send Survey Invitations Using Process Builder

Gather Feedback at the End of a Customer Support Chat Session

https://developer.salesforce.com/docs/atlas.en-us.apexref.meta/apexref/apex_interface_sfdc_surveys_associate_surveysubject_example.htm

Add the Survey Invitations Related List to Standard Object Record Pages

Use the Survey Invitations related list to view the surveys a contact, person account, lead, or user is invited to take. The related list populates invitations related to a participant.

1. From Setup, in Object Manager, select the object to which you want to add the related list.
2. Click **Page Layouts** and select the page layout that you want to add the related list to.
3. In the Layout panel, click **Related Lists**.
4. Drag the **Survey Invitations** related list onto the page layout.
5. Click 🔧 for the Survey Invitations related list.
6. In the Related List Properties dialog box, select the fields to display in the related list and the order in which the fields appear.
7. Click **OK**, and save your changes.

Example: If you use the Get Survey Invitation quick action to generate an invitation for a lead, the invitation is related to the lead record. The Survey Invitations related list on the lead record lists this invitation.

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USER PERMISSIONS

To view survey invitations:
- System Administrator profile

Add a Survey to Any Lightning Record Page

Use the Surveys component to add surveys to object records that support Lightning components. Your users can respond to the survey from the record page. You can also add the Surveys component to Experience Cloud sites to gather responses from guest users.

Make sure to select an Experience Cloud site in Survey Settings before adding the Surveys component to Experience Cloud sites.

1. Open a record for an object to which you want to add the Surveys component.
2. Click and select **Edit Page**.
3. In the Lightning App Builder, drag the Surveys component to where you want it to appear on the page.
4. In the Surveys component properties, select the survey that you want to appear on the record page.

   Note: You can only select surveys that are active.

5. Save your work, and then click **Activate**.

After you embed surveys in Salesforce record pages or Experience Cloud sites, generate the internal or external invitation links from the Survey Builder.

SEE ALSO:

Send Survey Invitation Links

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USER PERMISSIONS

To add the Surveys component:

- System Administrator profile

Add Topics to Survey Records

Use the Topics component to add themes to Survey, Survey Question, Survey Question Choice, and Survey Question Response records. You can analyze trending topics and learn how different areas of your business are performing in the Topic Analysis dashboard in Customer Lifecycle Analytics.

Enable Topics for Survey objects and then add the Topics component to the record pages.

1. From Setup, enter `Topics for Objects` in the Quick Find box, and select **Topics for Objects**.
2. Select the Survey objects one at a time.
3. Select **Enable Topics**.
4. Save your changes.
5. Open a record of any Survey object to which you want to add the Topics component.
6. Click and select **Edit Page**.
7. In the Lightning App Builder, drag the Topics component to where you want it to appear on the page.
8. Configure the Topics component properties.

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USER PERMISSIONS

To enable Topics and add the Topics component:

- System Administrator profile

9. Save your changes and then click **Activate**.

SEE ALSO:

Organize Records with Tags and Topics

Configure Topics for Records in Lightning Experience

Encrypt Survey Fields

Protect sensitive participant data collected in Surveys with Shield Encryption and meet regulatory compliance mandates. Encrypt data from Salesforce users, including administrators.

Encrypt data of these fields in the Survey Question Response object.

- Date Value
- Date Time Value
- Choice Value
- Response Value

SEE ALSO:

Strengthen Your Data's Security with Shield Platform Encryption

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Send Surveys to a Different Salesforce Org

Use package to transfer your survey records from one Salesforce org to another, such as sending a test survey from a sandbox org to a production org.

You can send a survey to a different org using a managed or unmanaged package. With a managed package, you can send multiple versions of a survey. With an unmanaged package, you can only send one version: the newest or active version of the survey.

In the new org, you can activate and archive versions of surveys installed from a package. You can also copy and clone those surveys. You can't, however, edit the content or create new versions of surveys installed from a package.

1. From Setup, in the Quick Find box, enter *Package Manager*, and then select **Package Manager**.
2. Click **New**.
3. Define your package and save your work.
4. In the Components tab, click **Add**.
5. For component type, select **Flow Definition**.
6. Select the surveys that you want to add to another org, and click **Add to Package**.

   Note: The package manager includes branding sets, data maps, and assets associated with the surveys.

7. Click **Upload**.
8. Add more details about your package and click **Upload** again.

For instructions on how to install the package in another org, see Install a Package.

When you add surveys to an org using a package, the package's namespace prefix is also associated with the survey records. To identify surveys that were added, add the Namespace Prefix field to your Surveys list view.

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USER PERMISSIONS

To enable managed packages:
- Customize Application

To create packages:
- Create AppExchange packages

To upload packages:
- Download AppExchange packages

SEE ALSO:

ISVforce Guide: Package and Test Your Solution

Use Merge Fields to Personalize Surveys

Create Custom Report Types to View Survey Data

Create a custom report type so that you can generate reports that provide insight on your survey data.

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Survey Objects for Report Types

Use the survey objects to create different types of reports depending on your use case.

Create a Custom Report Type to View Survey Scores

Create a custom report type based on survey question scores so that you can analyze the responses for every type of question except for short text and long text questions. View the responses in custom reports and dashboards for surveys or survey invitations.

Create a Custom Report Type to View Related Record Details

Create a custom report type so that you can generate reports with information about records related to survey invitations and responses.

Analyze Survey Responses in Custom Reports

Use the custom reports created with the Survey Question Score report type to view responses for every type of question except for short text and long text questions. The report can track responses by survey invitation or by survey version.

Survey Objects for Report Types

Use the survey objects to create different types of reports depending on your use case.

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Survey Question Responses

View the responses from one or more versions of a survey. Use the Created By: Full Name field to see the name of the participant who responded.

Survey Question Scores

View individual and overall scores for one or more questions.

Salesforce automatically updates question scores as soon as a response is registered, except when a participant changes or deletes a response they already submitted. To view updated responses, see the value in the Survey Question Response object.

Survey Subjects

Stores the invitations and responses related to other objects. Survey Subject records aren't available in Lightning Experience. For a complete list of objects that Survey Subjects supports, see the EntitySubjectType list in the SurveySubject object reference documentation.

Survey Versions

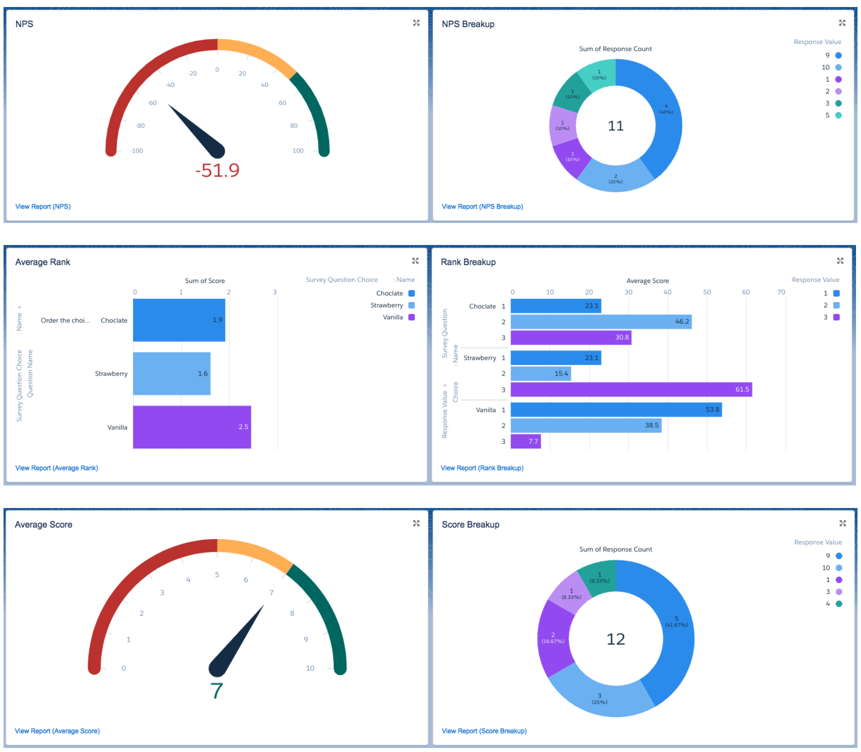
View the different versions of a survey and the responses related to each.

Create a Custom Report Type to View Survey Scores

Create a custom report type based on survey question scores so that you can analyze the responses for every type of question except for short text and long text questions. View the responses in custom reports and dashboards for surveys or survey invitations.

1. In Setup, enter `Report Types` in the Quick Find box, and then select **Report Types**.
2. If prompted, click **Continue**.
3. Click **New Custom Report Type**.
4. For primary object, select **Survey Question Scores**.
5. Enter the identification and deployment settings and then click Next.
6. Save your work.

Example: Here are some dashboard components that show responses to NPS, ranking, and scoring questions.



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USER PERMISSIONS

To create a custom report type:

- Manage Custom Report Types

Create a Custom Report Type to View Related Record Details

Create a custom report type so that you can generate reports with information about records related to survey invitations and responses.

Survey invitations and responses can be related to many different Salesforce objects through the Survey Subjects object, so create a custom report type that's based on any object that Survey Subjects supports, such as Account, Case, or Contact. For example, create a report type based on cases and use it to generate reports that help you analyze customer satisfaction scores when support cases close.

1. In Setup, enter `Report Types` in the Quick Find box, then click **Report Types**.
2. If prompted, click **Continue**.
3. Click **New Custom Report Type**.
4. For primary object, select an object supported by survey subjects, such as cases.
5. Enter the identification and deployment settings and then click **Next**.
6. Create a relationship from the primary object, cases, to survey subjects.
7. Create a relationship from survey subjects to survey responses.
8. Create a relationship from survey responses to survey question responses.
9. Save your changes.
   The report type contains information about the invitations, responses, and associated records. Now, add the question names to the report.
10. Select your new custom report type and then click **Edit Layout**.
11. From the View menu, select **Survey Question Responses Fields**, and then click **Add fields related via lookup**.

    Tip: Use the Survey Subject lookup fields to add more information about participants, such as email ID.

12. Click **Question**, and select **Question Name**.
13. Click **OK**.
14. Save your changes.

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USER PERMISSIONS

To create a custom report type:

- Manage Custom Report Types

SEE ALSO:

SurveySubject

Analyze Survey Responses in Custom Reports

Use the custom reports created with the Survey Question Score report type to view responses for every type of question except for short text and long text questions. The report can track responses by survey invitation or by survey version.

The question type determines the column interpretation. Questions can be categorized by:

- Score: Net Promoter Score (NPS), rating, score, and slider
- Answer choice: Multiple selection, single selection, and picklist
- Ranking
- Date

The sample reports represent responses from two participants.

The Survey Invitation: Name column displays the invitation name for which response is recorded. If there are multiple invitations for a survey, results are aggregated as a single value in the column name.

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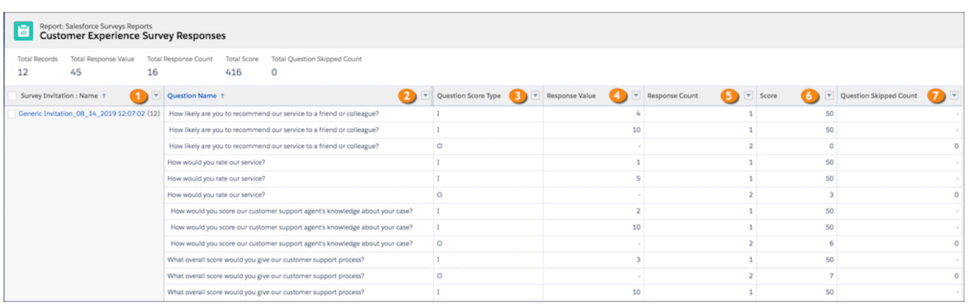
Score

Here's a survey invitation report with NPS, rating, score, and slider questions.

Question Name	Question Type
How likely are you to recommend our service to a friend or colleague?	NPS
How would you rate our service?	Rating
How would you score our customer support agent's knowledge about your case?	Score
What overall score would you give our customer support process?	Slider


Report: Salesforce Surveys Reports
Customer Experience Survey Responses

Total Records	Total Response Value	Total Response Count	Total Score	Total Question Skipped Count
12	45	16	416	0

Survey Invitation : Name (1)	Question Name (2)	Question Score Type (3)	Response Value (4)	Response Count (5)	Score (6)	Question Skipped Count (7)
Generic Invitation_08_14_2019 12:07:02 (12)	How likely are you to recommend our service to a friend or colleague?	I	4	1	50	-
	How likely are you to recommend our service to a friend or colleague?	I	10	1	50	-
	How likely are you to recommend our service to a friend or colleague?	O	-	2	0	0
	How would you rate our service?	I	1	1	50	-
	How would you rate our service?	I	5	1	50	-
	How would you rate our service?	O	-	2	3	0
	How would you score our customer support agent's knowledge about your case?	I	2	1	50	-
	How would you score our customer support agent's knowledge about your case?	I	10	1	50	-
	How would you score our customer support agent's knowledge about your case?	O	-	2	6	0
	What overall score would you give our customer support process?	I	3	1	50	-
	What overall score would you give our customer support process?	O	-	2	7	0
	What overall score would you give our customer support process?	I	10	1	50	-

Field Name	Description
Survey Invitation: Name (**1**)	The name of the invitation for which responses are recorded.
Question Name (**2**)	The name of the question for which responses are recorded.

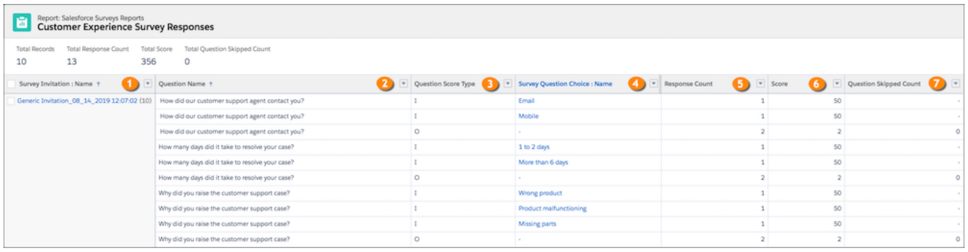
Field Name	Description
Question Score Type (**3**)	The value is either I (individual) or O (overall). • I – The individual scores that one or more participants select for a question. • O – The aggregate score for a question.
Response Value (**4**)	I – The score that one or more participants select for a question.
Response Count (**5**)	The value is either I (individual) or O (overall). • I – The number of participants who select the same score. • O – The number of participants who respond to a question.
Score (**6**)	The value is either I (individual) or O (overall). For rating, score, and slider questions: • I – The percentage of participants who select the same score for a question. • O – The average of all responses. For NPS questions: • I – The percentage of participants who select the same answer for a question. • O – The percentage of participants who select 9 or 10 minus the percentage of participants who select less than 7.
Question Skipped Count (**7**)	O – The number of participants who skip a question.

Answer Choice

Here's a survey invitation report with multiple selection, picklist, and single selection questions.

Question Name	Question Type
Why did you raise the customer support case?	Multiple Selection
How did our customer support agent contact you?	Picklist
How many days did it take to resolve your case?	Single Selection

The report has multiple fields with inputs about the survey question scores.



Report: Salesforce Surveys Reports
Customer Experience Survey Responses

Total Records	Total Response Count	Total Score	Total Question Skipped Count
10	13	356	0

Survey Invitation : Name 1	Question Name 2	Question Score Type 3	Survey Question Choice : Name 4	Response Count 5	Score 6	Question Skipped Count 7
Generic Invitation_08_14_2019 12:07:02 (10)	How did our customer support agent contact you?	I	Email	1	50	-
	How did our customer support agent contact you?	I	Mobile	1	50	-
	How did our customer support agent contact you?	O	-	2	2	0
	How many days did it take to resolve your case?	I	1 to 2 days	1	50	-
	How many days did it take to resolve your case?	I	More than 6 days	1	50	-
	How many days did it take to resolve your case?	O	-	2	2	0
	Why did you raise the customer support case?	I	Wrong product	1	50	-
	Why did you raise the customer support case?	I	Product malfunctioning	1	50	-
	Why did you raise the customer support case?	I	Missing parts	1	50	-
	Why did you raise the customer support case?	O	-	2	2	0

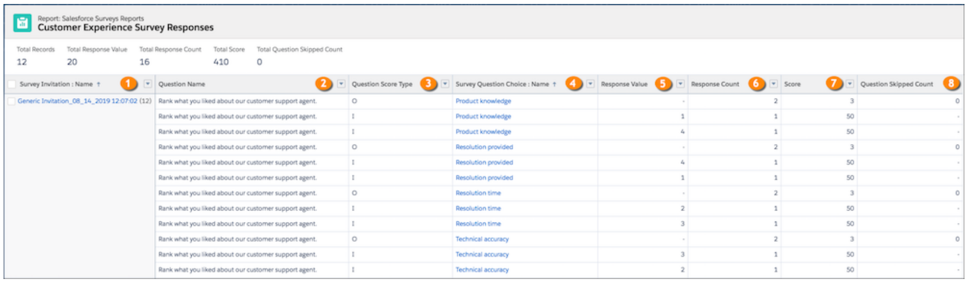
Field Name	Description
Survey Invitation: Name (**1**)	The name of the invitation for which responses are recorded.
Question Name (**2**)	The name of the question for which responses are recorded.
Question Score Type (**3**)	The value is either I (individual) or O (overall). • I – Each answer choice that one or more participants select for a question. • O – The number of participants who respond to a question.
Survey Question Choice: Name (**4**)	I – The answer choice that one or more participants select for a question. Note: In this report, the multiple selection question has three **I** rows because one participant can select two answer choices.
Response Count (**5**)	• I – The number of participants who select the same answer choice. • O – The number of participants who respond.
Score (**6**)	• I – The percentage of participants who select the same answer choice for a question. • O – The number of participants who respond to a question.
Question Skipped Count (**7**)	O – The number of participants who skip a question.

Ranking

This survey invitation report contains a ranking question.

Question Name	Answer Choices
Rank what you liked about our customer support agent.	• Product knowledge • Resolution provided • Technical accuracy

Question Name	Answer Choices
	• Resolution time


Report: Salesforce Surveys Reports
Customer Experience Survey Responses

Total Records	Total Response Value	Total Response Count	Total Score	Total Question Skipped Count
12	20	16	410	0

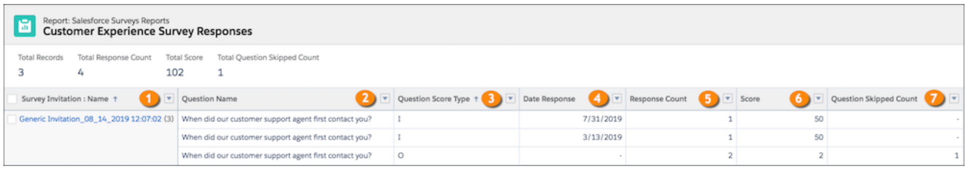
Survey Invitation : Name ↑ 1	Question Name 2	Question Score Type 3	Survey Question Choice : Name ↑ 4	Response Value 5	Response Count 6	Score 7	Question Skipped Count 8
Generic Invitation_08_14_2019 12:07:02 (12)	Rank what you liked about our customer support agent.	O	Product knowledge	-	2	3	0
	Rank what you liked about our customer support agent.	I	Product knowledge	1	1	50	-
	Rank what you liked about our customer support agent.	I	Product knowledge	4	1	50	-
	Rank what you liked about our customer support agent.	O	Resolution provided	-	2	3	0
	Rank what you liked about our customer support agent.	I	Resolution provided	4	1	50	-
	Rank what you liked about our customer support agent.	I	Resolution provided	1	1	50	-
	Rank what you liked about our customer support agent.	O	Resolution time	-	2	3	0
	Rank what you liked about our customer support agent.	I	Resolution time	2	1	50	-
	Rank what you liked about our customer support agent.	I	Resolution time	3	1	50	-
	Rank what you liked about our customer support agent.	O	Technical accuracy	-	2	3	0
	Rank what you liked about our customer support agent.	I	Technical accuracy	3	1	50	-
	Rank what you liked about our customer support agent.	I	Technical accuracy	2	1	50	-

Field Name	Description
Survey Invitation: Name (**1**)	The name of the invitation for which responses are recorded.
Question Name (**2**)	The name of the question for which responses are recorded.
Question Score Type (**3**)	The value is either I (individual) or O (overall). • I – The rank that one or more participants select for each ranking item. • O – The number of participants who respond to the question.
Survey Question Choice: Name (**4**)	I – The ranking item of a question.
Response Value (**5**)	I – The rank that one or more participants select for a ranking item.
Response Count (**6**)	• I – The number of participants who select the same rank for a ranking item. • O – The number of participants who respond to a question.
Score (**7**)	• I – The percentage of participants who select the same rank for a ranking item. • O – The average weight for a ranking item.
Question Skipped Count (**8**)	O – The number of participants who skip a question.

Date

This survey invitation report contains a date question.

Question Name	Question Type
When did our customer support agent first contact you?	Date



Field Name	Description
Survey Invitation: Name (**1**)	The name of the invitation for which responses are recorded.
Question Name (**2**)	The name of the question for which response is recorded.
Question Score Type (**3**)	The value is either I (individual) or O (overall). • I – Each date that one or more participants select in a question. • O – The number of participants who respond to the question.
Date Response (**4**)	I – The date selected in a question.
Response Count (**5**)	• I – The number of participants who select the same date for a question. • O – The number of participants who respond to a question.
Score (**7**)	• I – The percentage of participants who select the same date for a question. • O – The number of participants who respond to a question.
Question Skipped Count (**8**)	O – The number of participants who skip a question.

View the Usage of Survey Responses

See your survey response usage in the Usage-based Entitlements list.

1. In Setup, in the Quick Find box, enter `Company Information`, and then select **Company Information**.
2. In the Usage-based Entitlements related list, in the Resource column, look for Maximum survey responses allowed for an org.

   The Allowance column shows the total number of survey responses that are allowed for all contracts up to the current date, including 300 free survey responses for each contract. The Allowance value isn't reset when a contract is renewed.

   The Amount Used column shows the number of completed survey responses that have been used by your org up to the current date. The Amount Used value isn't reset when a contract is renewed.

   Note: Unused survey response entitlement isn't carried over when a contract is renewed.

Contact your Salesforce representative if you want to get monthly survey response usage details.

SEE ALSO:

Usage-Based Entitlements

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To view survey response usage:

- System Administrator profile

Create and Customize Surveys

Use a wide range of question types to engage participants. Create, copy, and manage surveys across versions. Personalize survey pages and survey questions to increase participant engagement. Allow participants to view survey pages and questions based on their previous responses. Customize the look and feel of your surveys to fit your company's brand. Design surveys to personalize your participants' experience. Gather feedback from a global audience by translating surveys.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Create Surveys and Add Questions

Create, copy, and manage surveys across versions. Add a variety of questions and define their properties.

Customize the Order of Survey Questions and Pages

Save your survey participants a click by automatically sending them to the next page after they answer the last question on a page. Choose which questions participants view based on their responses to previous questions on the same page. Show participants the most appropriate survey page based on their responses to questions on previous pages or by using merge fields.

Configure and Personalize Survey Questions and Responses

Personalize welcome messages, survey questions, and thank you messages by inserting field values in Salesforce records, participant details, company information, and custom values. Let participants upload documents in responses to attachment questions and respond to surveys in the email invitation itself. Validate participants' responses to short text questions.

Customize the Look and Feel of Your Surveys

Promote your company's brand and style in surveys by adding background images and your company's logo to surveys, and changing the labels, text color, and color of buttons. You can even insert images in survey pages.

Translate Surveys

Gather insight from your global audience by translating your surveys into other languages.

Define Default Settings

Define the default for email, language, engagement context, and invitation settings for your surveys.

Share and Grant Access to Surveys

Collect feedback and collaborate on survey design by sharing surveys with your team.

Create Surveys and Add Questions

Create, copy, and manage surveys across versions. Add a variety of questions and define their properties.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

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Create a Survey

Create a survey to collect data from customers, employees, or other people whose feedback you need.

Survey Question Types

Use a variety of question types to collect the information and feedback you seek.

Survey Question Properties

Use a question's properties to indicate whether the question is required and to add a description field to a question.

Insert Responses from Previous Questions

Customize a survey question or thank you message by including the participant's response from a previous question.

Create a Survey from a Copy

Make a copy of a survey to duplicate its questions and logic. When you copy a survey, it's not related to the original survey record. The copied survey becomes a new survey record.

Create a Survey Version

Create a version of a survey to duplicate its questions and logic. The new survey version is related to the original survey record in Salesforce.

How Ranking Questions Work

The average rank of an item in a ranking question is calculated based on its weight and the number of responses in which the item has the same rank.

Create a Survey

Create a survey to collect data from customers, employees, or other people whose feedback you need.

1. From the App Launcher, find and select **Surveys**.
2. Click **New**.
3. Enter a name for the survey.
4. To use the survey as a template, select **Create survey as a template**.

   Survey templates are automatically shared with Read access for all users in your Salesforce org.
5. Edit the survey's Welcome page.

   Note: If you want the survey to open on a question page, disable the Welcome page by clicking .
6. To add a question page, in the sidebar, click **Add Page**.
7. To add a question to the page, click **Add Question**.

   To reorder questions on a survey page, click above the rich text editor of the questions.
8. To change the question's properties, click .
9. Edit the survey's Thank You page.
10. To pause working on the survey and continue working on it later, click **Save**.
11. To see how the survey looks while you're working on it, click **Preview**.
12. To finish the survey so that you can send it, click **Activate**.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To create a survey:

- Permissions to create surveys

Survey Question Types

Use a variety of question types to collect the information and feedback you seek.

Question Type	Description
Attachment Note: The Attachment question type is available only with the Feedback Management - Starter and Feedback Management - Growth licenses.	Participants share details as attachments to survey responses.
Date	Participants select a date from a calendar.
Like or Dislike	Participants select whether they like something or not.
Long Text	Participants enter a free-form text answer.
Matrix Note: The Matrix question type is available only with the Feedback Management - Starter and Feedback Management - Growth licenses.	Participants select answers from the same set of choices for multiple questions. Survey creators can add single-selection or multiple-selection subquestions for a matrix question.
Multiple Selection	Participants select multiple answers from a list of choices.
Net Promoter Score® (NPS®)	Participants score to express how willing they're to recommend a product or a service. To remove color-coding of the response, turn off Color Code Responses.
Picklist	Participants select an answer from a predefined list of options. Salesforce stores picklist options as strings.
Ranking	Participants rank among two or more items.
Rating	Participants select a rating from a scale.
Score	Participants select a satisfaction score from a list of numbers.
Short Text	Participants enter a text answer of up to 200 characters.
Single Selection	Participants select only one answer from a list of choices.
Slider	Participants select a value on a sliding scale.

EDITIONS

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Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To add a survey question:

- Permissions to create surveys

Survey Question Properties

Use a question's properties to indicate whether the question is required and to add a description field to a question.

1. In the Survey Builder, select a question and click ⚙ ▾.
2. To indicate that a response is required, select **Required**.
3. To add a description field to the question, select **Description**.

EDITIONS

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Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To define the properties of a survey question:

- Permissions to create surveys

Insert Responses from Previous Questions

Customize a survey question or thank you message by including the participant's response from a previous question.

1. In the rich text editor of a survey question or thank you page message, enter the question to which you want to add a previous question's response.
2. Place the cursor where you want to insert the response, and click **Insert Content**.
3. Select **Response from a previous question**, and click **Next**.
4. In the Insert response window, select the question whose response you want to insert, and click **Insert**.
   The Survey Builder inserts the response as a merge field. When participants see the question, the inserted response appears.

Example: A survey has two pages, with one question on each page.

- First question: How would you rate our service?
- Second question: Tell us why you rated our service.

Place your cursor at the end of the second question to insert the first question. The second question now reads: Tell us why you rated our service {1.1 How would you rate our service?}. When a participant gives a rating of 5 and then views the second question, it looks like this: Tell us why you rated our service 5.

When inserting a response from a previous question, keep in mind these considerations.

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USER PERMISSIONS

To insert a previous question's response:

- Permissions to create surveys

- If you edit the merge field and remove a word or character, the merge field becomes invalid. Broken merge fields appear as text to the participants.
- If you use the rich text editor to style your question, make sure that the entire merge field is styled the same way.
- You can't insert Ranking question responses.
- You can't insert responses on the Welcome page.
- If you insert Like or Dislike question responses, participants view the response as either True or False.
- If your survey pages have branching logic, preview the survey to make sure that the responses are inserted as you expect.

Create a Survey from a Copy

Make a copy of a survey to duplicate its questions and logic. When you copy a survey, it's not related to the original survey record. The copied survey becomes a new survey record.

1. On the Surveys tab, click for the survey record that you want to copy, and select **Open Latest Version**.
2. If prompted, click **Open**.
3. Click , and then select **Make a Copy**.
4. Enter a name for your new survey.
5. To use the new survey as a template, select **Create survey as a template**.

   Surveys templates are automatically shared with Read access for all the users in your Salesforce org.
6. Make the required changes to the survey and save it.
7. To finish the survey so that you can send it, click **Activate**.

If you copy a survey that's translated in one or more languages, the translations are copied over to the new survey.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To copy a survey:
- Permissions to create surveys

Create a Survey Version

Create a version of a survey to duplicate its questions and logic. The new survey version is related to the original survey record in Salesforce.

1. On the Surveys tab, click ▼ for a survey record and select **Open Latest Version**.
2. If prompted, click **Open**.
3. Click ••• ▼, select **Create New Version**, and then select **Yes.Create New Version** > **Yes**.
4. Make the required changes to the survey and save it.
5. To finish the survey so that you can send it, click **Activate**.
   You can invite people to take only the active version.

Use the version selector in Survey Builder to switch between versions.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To create a survey version:

- Permissions to create surveys

How Ranking Questions Work

The average rank of an item in a ranking question is calculated based on its weight and the number of responses in which the item has the same rank.

An item's average weight is calculated using the formula: `w1p1 + w2p2 + w3p3 + w4p4 / total number of responses`, where "w" is the weight of a rank and "p" is the number of responses in which the item has the same rank. The item with the highest average weight has the highest average rank. The items with lower average weights have gradually lower ranks.

Note: When you add items to a ranking question, a weight is automatically applied to each item. When you customize the weight of a ranking item, make sure that the highest rank has the highest weight, and the lower ranks have lower weights. For example, if you have four ranking items, the values look like this.

Rank	Weight
1	4
2	3
3	2
4	1

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Customize the Order of Survey Questions and Pages

Save your survey participants a click by automatically sending them to the next page after they answer the last question on a page. Choose which questions participants view based on their responses to previous questions on the same page. Show participants the most appropriate survey page based on their responses to questions on previous pages or by using merge fields.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Enable Auto-Progress to the Next Survey Page

Help to speed participants through surveys by automatically sending them to the next page when they answer the last question on the current page.

Show Questions Based on Responses to Questions on the Same Page

Use display logic to show questions based on responses to other questions on the page.

Show Survey Pages Based on Responses or Merge Fields

Use page branching logic to determine the survey page that participants view next, and to allow participants to submit the survey and go to the Thank You page.

Enable Auto-Progress to the Next Survey Page

Help to speed participants through surveys by automatically sending them to the next page when they answer the last question on the current page.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To turn on Auto-Progress:

- Permissions to create surveys

1. In the Survey Builder, go to the Branding tab.
2. Turn on Auto-Progress.

Note: Participants can't automatically progress to the next page when the page ends with a date, attachment, long text, matrix, multiple selection, ranking, short text, or slider question. In those instances, participants must click **Next** to advance to the next page.

Show Questions Based on Responses to Questions on the Same Page

Use display logic to show questions based on responses to other questions on the page.

1. On a survey question page in the Survey Builder, click **Display Logic** for the question that you want to conditionally show.

   Note: You can't add display logic to the first question of a page.

2. In the Question display logic window, select whether the question appears for all conditions or any conditions that you define.
3. Define a condition.
   a. Select the question that defines the condition.

      Note: You can't define conditions based on ranking questions.

   b. Select an operator.
   c. Select or enter a response that determines whether the question is displayed.
   d. To define another condition, click **Add Condition**. Otherwise, save the question display logic.
4. To apply the logic, save the survey.

Example: A page has two questions.

- The first question is a New Promoter Score (NPS) question: How likely are you to recommend our service to a friend or colleague?
- The second question is a text question: Let us know how we can improve.

Add display logic to the second question to show it only when the participant's response to the first question is less than 7.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To add display logic to a question:

- Permissions to create surveys

Show Survey Pages Based on Responses or Merge Fields

Use page branching logic to determine the survey page that participants view next, and to allow participants to submit the survey and go to the Thank You page.

You can define two types of conditions for page branching logic:

- Conditions based on participants' previous responses
- Conditions based on merge fields

You can use the condition types independently or together. Add branching logic to the page that sends participants to another page.

Show Survey Pages Based on Responses

Use page branching logic that's based on a participant's responses to determine the next page that the participant views.

Show Survey Pages Based on Merge Fields

Use page branching logic that's based merge field conditions to determine the next page that a participant views.

Show Survey Pages Based on Responses

Use page branching logic that's based on a participant's responses to determine the next page that the participant views.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To add branching logic to a page:

- Permissions to create surveys

1. In the Survey Builder, click ⌖ for the survey page to which you want to add branching logic.
2. In the Page branching logic window, select how you want participants to go to a particular page.
   - If you want participants to always go to a particular page, select **Every time**, and then select the page to view next.
   - If you want to define rules to determine the page that participants go to next, select **Based on conditions**, and then define the conditions.
     a. Select the page that participants view when the conditions are met.
     b. Select whether the page appears for all conditions or any conditions that you define.
     c. For logic type, select **Response to Question** or one of the merge field variables.
     d. Select the question or merge field that defines the condition.

        Note: You can't define conditions based on ranking questions.

     e. Select an operator.
     f. Select or enter a response or field value that determines whether the page is displayed.
     g. To define another condition, click **Add Condition**.
     h. To save multiple conditions as a collection, click **Create Rule**.

        You can define multiple rules, each of which determines the page that participants go to next.

3. Save the logic, and then to apply it, save the survey.

Example: A survey has four pages.

- The first page contains a New Promoter Score (NPS) question: How likely are you to recommend our service to a friend or colleague?
- The second page contains a text question: Let us know what you didn't like.
- The third page also contains a text question: Let us know how we can improve.
- The fourth page is the Thank You page.

Add branching logic with these rules to the first page:

1. When the participant's response is 9 or more, go directly to the Thank You page.
2. When the participant's response is 7 or 8, go to the third page.
3. When the participant's response is 6 or less, go to the second page.

Then, add branching logic to the second and third pages to always send participants directly to the Thank You page.

Show Survey Pages Based on Merge Fields

Use page branching logic that's based merge field conditions to determine the next page that a participant views.

When defining merge field conditions for page branching logic, complete these tasks first.

- Set the access level for merge fields.

  Note: If you don't set the merge field access level, the branching logic condition validates at the User Context - Enforce all user permissions access level. If participants don't have access to a field due to the merge field's access level, the branching logic condition validates against an empty value.

- Configure the merge field variables.

1. In the Survey Builder, click for the survey page to which you want to add branching logic.
2. In the Page branching logic window, select how you want participants to go to a particular page.
   - If you want participants to always go to a particular page, select **Every time**, and then select the page to view next.
   - If you want to define rules to determine the page that participants go to next, select **Based on conditions**, and then define the conditions.

   a. Select the page that participants view when the conditions are met.
   b. Select whether the page appears for all conditions or any conditions that you define.
   c. For Logic Type, select a merge field type.
      - Associated Record: The branching logic condition validates against the value of the merge field in the record that's associated with the survey invitation. If multiple records are associated with a survey invitation, the condition validates against the value from the most recently updated record.
      - Participant Record: The branching logic condition validates against the value of the merge field in the participant record that's associated with the survey invitation.
      - Org Variable: The branching logic condition validates against the value of the company information field.
      - Custom Variable: The branching logic condition validates against the value that you define.
   d. Select a merge field that defines the condition.
   e. Select an operator.
   f. Select or enter a field that validates the condition.
   g. To define another condition, click **Add Condition**.
   h. To save multiple conditions as a collection, click **Create Rule**.

      You can define multiple rules, each of which determines the page that participants go to next.
3. Save the logic, and then to apply it, save the survey.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To add branching logic to a page:

- Permissions to create surveys

Example: A survey gathers customer feedback after a case closes. The survey contains different questions for high-, medium-, and low-priority cases. The first question asks whether the customer is happy with the case resolution. The next three pages contain questions for each case priority.

Branching logic is added to the first page to determine the page that the participant goes to based on the priority of the participant's case record. The branching logic contains three rules, each of which has one merge field condition that's based on the Priority field. When a participant finishes the first page of the survey, the merge field condition checks the value of the Priority field in the participant's case record. If the Priority value in the related case is High, then participant goes to the survey page that contains questions for high-priority cases.

SEE ALSO:

Select the Access Level for Merge Fields

Configure Variables for Merge Fields

Configure and Personalize Survey Questions and Responses

Personalize welcome messages, survey questions, and thank you messages by inserting field values in Salesforce records, participant details, company information, and custom values. Let participants upload documents in responses to attachment questions and respond to surveys in the email invitation itself. Validate participants' responses to short text questions.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Use Merge Fields to Personalize Surveys

Define and insert variables for merge fields in welcome messages, survey questions, and thank you messages. Inserted merge fields resolve to field values in Salesforce records, participant details, company information, and custom values.

Configure Attachment Questions

Allow participants to upload documents such as receipts for warranty claims by including attachment questions in your survey.

Create Surveys That Participants Can Complete from the Email Invitation

Create a one-question survey that participants can complete with a single click from within the email invitation.

Validate Short-Text Responses

Validate responses to short-text questions to help ensure the quality of feedback you receive.

Create Survey Data Maps to Create or Update Records

Incorporate feedback into your Salesforce org by creating data maps that automatically create or update case or other records based on a participant's responses.

Show Survey Progress to Participants

Show a progress bar on surveys so that participants can see how far along they are.

Customize the Thank You Message

Customize the message that participants see when they finish the survey. Write multiple messages and then create the logic that determines which message participants view.

Link to Webpages from the Thank You Page

Keep your customers engaged after they respond to surveys by adding links or redirects to your company website, social media pages, or other webpages on the Thank You page.

Use Merge Fields to Personalize Surveys

Define and insert variables for merge fields in welcome messages, survey questions, and thank you messages. Inserted merge fields resolve to field values in Salesforce records, participant details, company information, and custom values.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

Select the Access Level for Merge Fields

Select the access level for merge fields to ensure that survey participants view only the Salesforce data that you want them to see. When a participant opens a survey, it resolves the merge fields that the participant has access to.

Configure Variables for Merge Fields

Configure variables that define the information that you want merge fields to insert, including field values from records related to survey invitations, participant details, company information, and custom values.

Insert Merge Fields

After you configure merge fields, insert them to personalize welcome messages, questions, and thank you messages for each participant.

Preview Surveys to View Merge Field Values

Preview surveys to see how inserted data looks for participants.

SEE ALSO:

Send Surveys to a Different Salesforce Org

Select the Access Level for Merge Fields

Select the access level for merge fields to ensure that survey participants view only the Salesforce data that you want them to see. When a participant opens a survey, it resolves the merge fields that the participant has access to.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To select the access level of merge fields:

- Permissions to create surveys

Important: Merge field access levels are based on the running contexts supported by Flows.

1. In the Survey Builder, click **Advanced Settings** and then select **Merge Field Variables**.
2. In the Merge Field Access Level section, select the access level.
   - User Context - Enforce all user permissions: Respects the object and field-level access defined in the participant's profile and assigned permission sets.
   - System Context - Enforce record-level access: Respects the org-wide default settings, role hierarchies, sharing rules, manual sharing, teams, and territories. Does *not* respect the participant's object permissions and field-level access set by profiles and permission sets.
   - System Context - Ignore record-level access: Considers that the participant has access to all data in your Salesforce org and resolves all merge fields.

   Note: If the merge fields' access level isn't selected for a survey, the merge fields resolve based on the User Context - Enforce all user permissions access level.

When you select one of the system context access levels, a badge appears in the Survey Builder header. The badge reads: System Context. This badge helps survey creators identify the merge fields' access level, especially when they view a survey that a package added to your org.

SEE ALSO:

Running User of a Flow

Always Run in System Context

Show Survey Pages Based on Merge Fields

Configure Variables for Merge Fields

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To configure merge field variables:

- Permissions to create surveys
- Read permission on the associated objects and the participant objects

Configure variables that define the information that you want merge fields to insert, including field values from records related to survey invitations, participant details, company information, and custom values.

You can add up to 25 merge field variables, excluding the variables that insert record IDs.

1. In the Survey Builder, click **Advanced Settings**, and then select **Merge Field Variables**.
2. In the Object Variables for Merge Fields section, define these variables.
   a. Name the associated object variable and select the object whose records are related to the invitations of this survey. Use this variable to insert field values in the related record.
   b. Name the participant object variable and select the object that stores the participant records. Use this variable to insert field values in the participant record related to the survey invitation.
   c. Save the associated object and the participant object variables.

   Note:

   - If a participant doesn't have access to an object referenced by a merge field, the merge fields in email invitations don't resolve and the survey doesn't open.
   - Polymorphic merge fields don't resolve in email invitations.
   - If the field that a merge field resolves to is empty, the survey doesn't display any information for the merge field.
3. In the Org and Custom Variables section, define these types of variables.
   a. Create org variables that merge fields use to insert information about the company.
   b. Create custom variables with your own values that merge fields insert.
   c. Save the org and custom variables.

Example: If your survey gathers feedback from contacts on the case resolutions, create variables to insert custom information. For example, insert the case subject, the contact's first name, the company's name, and the service team's name.

- Create an associated object variable with the Case object.
- Create a participant object variable with the Contact object.
- Create an org variable and for the variable value, select **Name**.
- Create a custom variable and for the variable value, enter the service team's name.

SEE ALSO:

Show Survey Pages Based on Merge Fields

Insert Merge Fields

After you configure merge fields, insert them to personalize welcome messages, questions, and thank you messages for each participant.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To insert merge fields:

- Permissions to create surveys
- Read permission on the fields that are inserted as merge fields

1. Open the survey.
2. Place the cursor where you want to insert a merge field and click **Insert Content**.

   You can insert merge fields in welcome messages, survey questions, and thank you messages.
3. Select the type of variable that you want to insert, and click **Next**.

   You can insert merge fields only using the variable types configured for this survey.
4. Select the merge field that you want to insert for each variable type.
   - Associated record: The value of the field in the record related to the invitation that the participant used to open the survey. If multiple records are associated with a survey invitation, the merge fields insert values from the most recently updated record.
   - Participant record: The value of the field in the participant's record.

     Note: The merge field doesn't insert values from a participant's Experience Cloud site user record.
   - Org variable: The value of the company information.
   - Custom variable: The custom value.

   Warning: If a user edits a merge field and removes a word or character, the merge field breaks and doesn't insert information in the survey.
5. Click **Insert**.

To insert merge fields in welcome message descriptions, question descriptions, answer choices, or thank you message descriptions, enter the merge fields manually. You can also insert merge fields in welcome messages, questions, or thank you messages, and then copy them.

Note: Merge fields that are inserted in the scale labels of a rating question don't insert information in the invitation email.

Preview Surveys to View Merge Field Values

Preview surveys to see how inserted data looks for participants.

When you click **Preview** for a survey with merge fields, Survey Builder prompts you to select associated records and participant records. Merge fields insert field values from the selected records in preview. You can also enter values for custom variables.

Keep in mind these Survey preview considerations.

- Preview doesn't show org variables. Org variables resolve automatically in the published survey.
- You can't preview merge fields whose access level is System Context: Enforce record-level access or System Context: Ignore record-level access.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

Configure Attachment Questions

Allow participants to upload documents such as receipts for warranty claims by including attachment questions in your survey.

Select the file types of attachments, the maximum number of attachments, and the maximum size of each file that a participant can upload in survey responses.

Important: You can't create a survey with attachment questions for anonymous users or generate a public invitation for surveys with attachment questions.

To let guest users upload files, select Allow site guest users to upload files in the General Settings page for Salesforce Files, and then define the sizes and types of files that they can upload. Add the lightning:fileUpload lightning component for guest users to upload files.

1. Create a survey or open an existing survey.
2. On a new or existing page, click **Add Question**, and then select **Attachment**.
3. To allow participants to upload attachments in a specific file format, click **Allow Only Specified File Types** and then select one or more attachment types. You can select PDF, Spreadsheet, Document, or Graphic.

File Type	Supported File Extensions
PDF	.pdf
Spreadsheet	.csv, .ods, .xls, .xlsx
Document	.doc, .docx, .odt, .txt
Graphic	.jpg, .jpeg, .gif, .png

   To let participants upload any type of attachment, leave Allow Only Specific File Types disabled.

4. For Maximum Attachments to Upload, select the maximum number of attachments that a participant can upload.
5. For Maximum File Size, select the maximum size of each file that a participant can upload.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To upload supporting documents in survey responses:

- Permissions to create surveys

6. Save and activate the survey.

   Participants can upload a maximum of 10 files for all the attachment questions in the survey. Uploaded files are available from Files home.

View uploaded files in related survey records by adding the Files related list to their page layouts.

- To view files uploaded for a survey that hasn't been submitted, add the Files related list to the page layout of survey invitations.
- To view uploaded files of a submitted survey, add the Files related list to the page layouts of survey responses, survey question responses, or the contacts or leads related to the participant. They don't appear in the Files related lists of survey invitations.

SEE ALSO:

Files Home

Add the Files Related List to Page Layouts

File Visibility and Sharing in Experience Cloud Sites

Limit Files in Your Experience Cloud Site

lightning:fileUpload lightning component

Create Surveys That Participants Can Complete from the Email Invitation

Create a one-question survey that participants can complete with a single click from within the email invitation.

1. Create a survey.
2. Go to the Branding tab and turn on Auto-Progress.
3. Disable the Welcome page.
4. Add a page with a single Net Promoter Score, rating, or score question.

   Note: You can only embed Net Promoter Score, rating, and score questions in an email.

5. Save and activate the survey.

When a participant responds to the survey from within the email invitation, the thank you message opens in a new tab of the participant's default browser.

If you're emailing the survey using automated processes like Support Settings or Case Auto-Response Rules, select the question as the email content in Default Settings.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To create surveys with a single question:

- Permissions to create surveys

Validate Short-Text Responses

Validate responses to short-text questions to help ensure the quality of feedback you receive.

Add validation to short text questions to make sure that participants enter either a number or text that conforms to a custom validation formula, such as not allowing special characters in the response.

1. Create a survey or open an existing survey.
2. On a new or existing page, click **Add Question**, and then select **Short Text**.
3. Select the Response Validation Type that you want to apply to the question: No Validation (the default), Number, or Custom.
4. If you select Custom as the Response Validation Type , enter a Validation Formula.

   The Validation Formula for the Number Response Validation Type is automatically defined, populated, and can't be edited..
5. Save and activate the survey.

Example: Here are some examples of custom validations for a response.

- Validate the format of an email address

```
REGEX({!Email_Address},"[a-zA-Z0-9._%+-]+@[a-zA-Z0-9.-]+.[a-zA-Z]{2,4}")
```

- Validate the format of a ZIP code

```
REGEX({!Zipcode},"\\d{5}(-\\d{4})?")
```

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To add validations for short-text responses:

- Permissions to create surveys

Create Survey Data Maps to Create or Update Records

Incorporate feedback into your Salesforce org by creating data maps that automatically create or update case or other records based on a participant's responses.

1. In the Survey Builder, click **Advanced Settings**, and then select **Survey Data Mapping**.
2. Click **New Mapping**.

   You can create up to 20 data maps for a survey.
3. Name the mapping.
4. Select whether to create or update records.
5. From the Target Object dropdown, select the object whose records you want to create or update.
   - You can create records for any object in your Salesforce org.
   - You can update records of objects that are associated with the survey invitation records and survey response records of any object that Survey Subjects supports.
6. Select the Condition Type.
   a. To always create or update records from responses, select **Every time**.
   b. To define rules that determine when to create or update records, select **Based on conditions**, and then define the conditions.
      - Select whether to create or update records for all or any conditions that you define.
      - Select a Logic Type.

        Response to Question
        Defines the condition based on responses to questions in the survey.

        Associated Record
        Defines the condition based on the value of the associated object merge field.

        Participant Record
        Defines the condition based on the value of the participant object merge field.

        Custom Variable
        Defines the condition based on the value of the custom variable merge field.

        Org Variable
        Defines the condition based on the value of the org variable merge field.
      - Select an Operator.
      - Select or enter a Response that validates the condition.

        Note: The values of merge fields show as API names. For example, the value of an owner name field appears as OwnerId.
      - To define another condition, click **Add Condition**.
7. Define the target object's fields and values.
   a. Select a Field.
   b. If the Information Type is String, Picklist, Boolean, Currency, Date, or DateTime, define a constant Value.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To create or update data maps:
- Create and send survey permissions
- Read and Create permission for the objects whose records the data map creates or updates
- Read and Create permission for fields that the data map creates or updates
- Read permission for records with mapped ID

To view data maps:
- Read permission for the Survey object

c. If the Information Type is Response to Question, select a question whose response is populated. If the participant doesn't respond to a question, the field mapped to the question remains blank. You can only map question types that are supported for each field type.

Field Type	Supported Question Types
Address	Short Text and Long Text
Currency	Scoring, Net Promoter Score, Slider, Rating, Short Text, and Long Text
Date	Date
DateTime	Date
Double	Scoring, Net Promoter Score, Slider, Rating, Short Text, and Long Text
Email	Short Text and Long Text
ID	Short Text and Long Text
Int	Scoring, Net Promoter Score, Slider, Rating, Short Text, and Long Text
Long	Scoring, Net Promoter Score, Slider, Rating, Short Text, and Long Text
MultiSelectPicklist	Picklist and Single Selection
Percent	Scoring, Net Promoter Score, Slider, Rating, Short Text, and Long Text
Phone	Short Text and Long Text
Picklist	Picklist and Single Selection
String	Scoring, Net Promoter Score, Slider, Rating, Short Text, Long Text, Picklist, and Single Selection
URL	Short Text and Long Text

Note: You can't map responses to multiple selection questions and ranking questions.

d. If the Information Type is Associated Record ID, enter the ID of the record that is associated with the survey invitation. If multiple records are associated with a survey invitation, the ID of the latest association is populated.

e. If the Information Type is Associated Record, select a field value from the associated record configured as merge field.

f. If the Information Type is Participant Record, select a field value from the participant record configured as merge field. You can only map merge field values of associated records and participant records that are supported for each field type.

Field Type	Associated Record - Supported Merge Fields Value Type	Participant Record - Supported Merge Fields Value Type
Address	• Address • String • Text area • Int • Long	• Address • String • Text area • Int • Long

Field Type	Associated Record - Supported Merge Fields Value Type	Participant Record - Supported Merge Fields Value Type
	• Reference	• Reference
Boolean	Boolean	Boolean
Currency	• Currency • Int • Double	• Currency • Int • Double
Date	Date	Date
DateTime	Date time	Date time
Double	Double	Double
Email	Email	Email
ID	• String • ID	• String • ID
Int	Int	Int
Long	• Long • Int	• Long • Int
MultiSelectPicklist	None	None
Percent	Percent	Percent
Phone	• String • Int • Long • Phone	• String • Int • Long • Phone
Picklist	None	None
String	All	All
Text Area	All	All
Time	None	None
URL	• URL • String • Int • Long	• URL • String • Int • Long

g. If the Information Type is Custom Variable, select a predefined value. You can only map merge field values of custom variables that are supported for each field type.

Field Type	Supports Custom Variables?
Address	Yes
Boolean	No
Currency	No
Date	No
DateTime	No
Double	No
Email	No
ID	Yes
Int	No
Long	No
Multipicklist	No
Percent	No
Phone	Yes
Picklist	No
String	Yes
Text Area	Yes
Time	No
URL	Yes

h. If the Information Type is Org Variable, select predefined values about your company. You can only map merge field values of org variables that are supported for each field type.

Field Types	Supported Organization Variables
Address	All
Boolean	None
Currency	None
Date	None
DateTime	None
Double	• Latitude

Field Types	Supported Organization Variables
	• Longitude
Email	None
ID	None
Int	• Latitude • Longitude
Long	• Latitude • Longitude
Multipicklist	None
Percent	• Latitude • Longitude
Phone	All
Picklist	None
String	All
Text Area	All
Time	None

i. If the Information Type is Last Modified Timestamp, select the latest data map execution timestamp that you want to add to a record.

j. If the Information Type is Existing Map, map the ID of the record created or updated by the previous map. You can map an existing map only when your data map is used to create records.

8. To add another mapping row, click **Add Row**.
9. Save the mapping and the survey.

Example: Every year, a solar panel manufacturer shares a survey to gather customer satisfaction scores and to check if their solar panels require servicing.

- Score question: How likely are you to recommend our solar panels to your colleagues and friends?
- Follow-up long text question: Tell us the reasons for the Net Promoter Score (NPS).
- Single selection question: Does your solar panel require servicing?

The survey contains two data maps. One map creates a case record when a customer provides a score of 3 or less. The other map creates a task record when a customer indicates that their solar panel requires servicing. Here's how some of the fields are mapped in each data map.

- In the data map that creates the case records:
  - The Contact ID of the participants is mapped to the Contact ID of the case.
  - The Escalated field is mapped to True.

  - The Subject field is mapped to the constant value: Customer satisfaction score is less than 5.
  - The Description field is mapped to the response to the follow-up question asking about the reasons for the customer satisfaction score.
- In the data map that creates the task records:
  - Related to ID field is mapped to the ID of the case created by the previous data map.
  - The Subject field is mapped to the constant value: Solar Panel requires servicing.
  - The Status field is mapped to Not Started.

SEE ALSO:

Create Survey Data Maps for Sentiment Insights

Show Survey Progress to Participants

Show a progress bar on surveys so that participants can see how far along they are.

1. With a survey open in the Survey Builder, go to the Branding tab.
2. Turn on Progress Bar.
   Participants see the progress bar at the top of the survey.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To enable the progress bar:
- Permissions to create surveys

Customize the Thank You Message

Customize the message that participants see when they finish the survey. Write multiple messages and then create the logic that determines which message participants view.

1. In the Survey Builder, on the Thank You page, turn on Customize Page.
2. Using the rich-text editor, enter a default thank you message of up to 1,000 characters and, optionally, additional details. Or,
3. Click **Add Custom Message** to create a message.
4. When you have two or more messages, define which message participants see based on a response to a survey question or based on merge field criteria.
   a. Click **Display Logic** for a custom message.
   b. Select whether the custom message appears for any or all conditions that you define.
   c. For Logic Type, select **Response to Question** to show participants a thank you message based on an earlier response. Otherwise, select a merge field variable to show a message based on merge field criteria.
   d. Select the question or merge field for the condition.

      Note: You can't define conditions based on ranking questions.

   e. Select an operator.
   f. Select or enter a response or field value that determines when the custom message shows.
   g. To define another condition, click **Add Condition**.
5. Save the logic, and then to apply it, save the survey.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To customize the Thank You page:
- Permissions to create surveys

Example: A survey has three pages.

- The first page contains a New Promoter Score (NPS) question: How likely are you to recommend our service to a friend or colleague?
- The second page contains a text question: Let us know what you didn't like.
- The third page is the Thank You page with a default message and a custom message.

Add display logic to the custom thank you message. When the participant's response to the NPS question is 7 or more, go directly to the Thank You page with the custom message.

Link to Webpages from the Thank You Page

Keep your customers engaged after they respond to surveys by adding links or redirects to your company website, social media pages, or other webpages on the Thank You page.

1. In the Survey Builder, on the Thank You page, turn on Customize Page.
2. To automatically send participants to your company or other webpage after 5 seconds, click the URL dropdown and select **Redirect**. Then, enter the URL where you want to send participants.
3. To add a button that participants can use to go to a webpage, click the URL dropdown and select **Button**. Then, enter the URL.

   You can add up to five buttons.
4. Save the survey.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To customize the thank you page:
- Permissions to create surveys

Customize the Look and Feel of Your Surveys

Promote your company's brand and style in surveys by adding background images and your company's logo to surveys, and changing the labels, text color, and color of buttons. You can even insert images in survey pages.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Add Custom Branding to Your Surveys
Customize surveys to reflect your company's brand and style.

Insert Images in Survey Pages
Insert one or more images in questions and on the Welcome and Thank You pages.

Add Custom Branding to Your Surveys

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

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Customize surveys to reflect your company's brand and style.

With a survey open in the Survey Builder, go the Branding tab to change the survey's look and feel.

Background Image
Replace the default background image with an image that's less than 750 KB (Windows) and 763 KB (Mac operating system). Adjust the opacity and the blur of the image. You can also remove the image and replace it with a background color.

Tip: We recommend that you upload images with an aspect ratio of 16:9, such as 1920 x 1080, for optimal viewing on high-definition monitors and mobile devices.

Logo
To add your company's logo to the survey, click **Upload Logo**.

Logo Background
Adjust the color and the opacity of the logo background.

Button Labels
Enter custom labels for the Back, Next, Pause, and Finish buttons. If you don't provide custom labels, the default button labels are displayed.

Content Card
Change the opacity of the content card that displays survey questions.

Question
Change the text color of questions in the survey.

Answer Choices
Change the text color, button color, and opacity of answer choices for multiple selections, ranking, rating, and single selection questions.

Start, Next, and Finish Buttons
Change the text and button colors of the Start, Next, and Finish buttons.

Previous Buttons
Change the text and button colors of the Previous button.

Insert Images in Survey Pages

Insert one or more images in questions and on the Welcome and Thank You pages.

1. On the rich text editor of a question, of the Welcome page, or of the Thank You page, click .
2. Select an image to insert.
   - To select an image that's already stored in your org, click **Asset Libarary**, select the image, and then click **Add**.
   - To insert a new image, click **Upload Image** and select the image from your computer.

   You can upload images that are less than 5 MB. Images are added to your org's asset library and are visible to unauthenticated guest users.

Note: If you add images to a survey in a sandbox org, you have to add them to the production org, too.

SEE ALSO:

View and Edit Asset Files

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To insert images in survey pages:

- Profile that allows the user to create and send surveys

Translate Surveys

Gather insight from your global audience by translating your surveys into other languages.

1. On the record page for the survey that you want to translate, go to the Languages tab.
2. Next to the language, click **Translate**.
3. Enter translations for the survey name, pause message, custom button labels, survey questions, answer choices, thank you page messages, and URL button labels on the Thank You page. You can translate only the text provided by the survey creator and the static merge field text. Salesforce translates the remaining text in the languages that it fully supports.

   While translating survey questions, click to insert images.

   Note: The text of matrix questions and merge field content that's inserted based on field values from Salesforce records can't be translated.

4. When you're done, save your work.

   Tip: When you make a copy of an already translated survey, the translations are also copied to the new survey.

Keep in mind these considerations when translating surveys.

- On the Languages tab, you can only see languages that are active in the Translation Workbench, and you can translate surveys only in languages to which you're assigned as a translator. If you aren't assigned as a translator to any language, Salesforce doesn't show the Languages tab.
- If the survey contains merge fields with associated record variables, participant record variables, or org variables, copy the merge fields to the translated question, thank you message or welcome message. The merge field automatically resolves when participants open the translated survey.
- If a previous question's response is added to a question, the translated version of the previous question appears in a merge field in the current question. As a result, you have to copy the merge field that contains the previous question to the translated version of the current question. The merge field automatically resolves when participants view the current question.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To translate surveys:

- Permissions to translate languages in the Translation Workbench
- Read permission for the Survey object
- Read AND Create permissions for the Asset object

Survey Language for Participants

Understand how participants inside and outside your Salesforce org see and respond to translated surveys.

Specify the Survey Language for External Participants

When participants outside your Salesforce org open a survey invitation, they select the language in which they want to view the survey. However, you can edit the survey invitation link for external participants to ensure that they view the survey in a particular language.

SEE ALSO:

Assign Permissions to Translate Surveys

Supported Languages

Surveys Translation REST API Resources

Survey Language for Participants

Understand how participants inside and outside your Salesforce org see and respond to translated surveys.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

When a participant in your org opens a survey invitation, the survey opens in the default language set by the participant. If a survey isn't translated in the participant's default language, the survey opens in the language that it was created in.

Participants outside your org can choose from a list of languages in which a survey is translated, including the language that the survey was created in.

Note: Use Default Settings to select the language in which a survey was created. This selection helps participants outside your org identify the language in which the survey was created. Select the default language to also ensure that participants see survey components like the Next or Previous buttons in the default language.

An anonymous participant can take a survey from the guest page of an Experience Cloud site. The participant chooses from the list of languages in which the survey is translated.

When participants open a survey in right-to-left languages like Hebrew or Arabic, the survey reads from right to left.

SEE ALSO:

Define Default Settings

Specify the Survey Language for External Participants

When participants outside your Salesforce org open a survey invitation, they select the language in which they want to view the survey. However, you can edit the survey invitation link for external participants to ensure that they view the survey in a particular language.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

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USER PERMISSIONS

To personalize a survey:
- Profile that allows the user to create and send surveys

1. With the survey open in the Survey Builder, click **Send**.
2. To generate the survey invitation link, click **Get Invitation**.
3. Click **Participants Outside Your Company**.
4. If you want external participants to always view the survey in a particular language, append the language code to the end of the invitation link in the format `&guestUserLang='<language_code>'`.

   Note: Make sure that the survey is translated in the desired language for participants outside your org.

5. Send the unique survey invitation link to the participants.

Example: Let's customize a survey invitation for external participants so that they always view the survey in French. The survey invitation link that's generated for all the participants outside your org is:
`https://samplesurveyinvitation.com/inviationID=testinvitation&surveyname=caseresolved`.
To make sure that the external participants see the survey in French, add *`&guestUserLang='fr'`* to the end of the link so that the link is
`https://samplesurveyinvitation.com/inviationID=testinvitation&surveyname=caseresolved&guestUserLang='fr'`.

SEE ALSO:

Send Survey Invitation Links

Define Default Settings

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Define the default for email, language, engagement context, and invitation settings for your surveys.

1. In the Survey Builder, click •••, and then select **Default Settings**.
2. In the Email Settings section, define the settings for emails sent using Support Settings, Case Auto-Response Rules, and the Send Survey action in the Process Builder or Flows.
   a. For Content, select whether you want to embed the survey link or a particular question in the email invitation.
      You can embed like or dislike, Net Promoter Score (NPS), rating, or score questions.
   b. For Email Templates, select the email template.
   c. For Email Sender Address, select the email address to send the survey.
3. In the Language Settings section, select the language used to create the survey. When participants outside your organization open a survey invitation, they can select the language they want to use to respond. Participants also see survey components such as the Next or Previous buttons in the language used to create the survey.
4. In the Engagement Context Settings section, select a custom metadata type that determines the engagement context of the survey invitation. Setting an engagement context helps you collect additional information about the targeted participant groups. Use the engagement context information to gain actionable insights about the participants.
5. In the Invitation Settings section, select the users who have edit access to survey invitation records. Edit access to invitation records allows someone to see the survey responses of the invitation recipient. By default, survey owners have edit access to invitation records. If desired, you can also give edit access to owners of records associated with the invitation.

   Invitations emailed by Support Settings, Case Auto-Response Rules, and processes defined in the Process Builder are shared with record owners.

SEE ALSO:

Considerations for Sending Email Invitations to Gather Feedback on Support Cases

Survey Language for Participants

Send Survey Invitations Using Process Builder

Define Default Settings

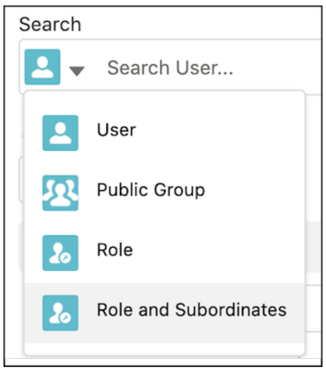
Define Default Settings

Use Rules to Target Survey Participants

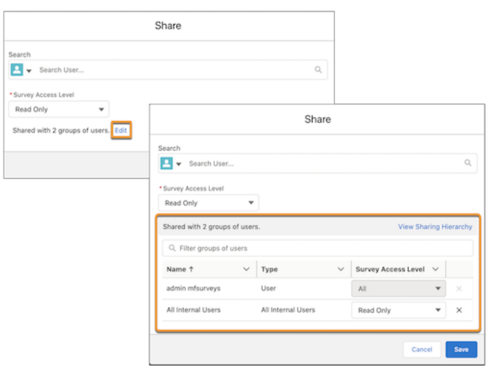
Share and Grant Access to Surveys

Collect feedback and collaborate on survey design by sharing surveys with your team.

The organization-wide default sharing settings for all survey objects are private for both internal and external access, and can't be changed. Instead, manually share a survey with users or groups of users in your org.

1. On the survey record page, click **Sharing**.
2. Select a user type, and then search for the user, group, or role and subordinates with whom you want to share the survey.
   - 

3. For survey access level, select **Read/Write** to collaborate on creating surveys.
4. Save your work.
5. To remove access or to update the access level for a survey, in the Share window, click **Edit**.



To view the sharing hierarchy and user access details, click **View Sharing Hierarchy**.

SEE ALSO:

Share Survey Invitations with Users

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Distribute Surveys

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Generate different types of survey invitations and distribute them in a way that best suits your participants' needs. You can generate individual invitations, send invitations by email, or automate the distribution process.

To send a survey to Experience Cloud site members, you must belong to that site.

To enable participants to take the survey without logging in, ensure that:

- Experience Cloud is enabled in your org.
- Public access is enabled for the site.
- On the Survey Settings page, the site is selected as the default for generating public survey invitations.

Send Survey Invitation Links

Generate a survey invitation link, configure the invitation settings to control your survey's security, and send the invitation to participants.

Send Survey Invitations by Email

Email survey invitations to individual participants using their email address, or to a group of participants using a list. Use invitation templates that include the survey question or a link to the survey, customize the templates, or compose your own email invitation.

Send Survey Invitations Using Process Builder

Use the Send Survey Invitation action type in Process Builder to email survey invitations to leads, contacts, and users in your org.

Send Survey Invitations Using Flows

Use Flow Builder to automatically send email survey invitations to leads, contacts, and users in your org based on an action, such as when a customer support case closes.

Share a QR Code that Contains a Survey Invitation Link

Download a QR code that contains a survey and share it with participants in printed marketing materials or for easy access from mobile devices.

Generate Survey Invitations for Contacts, Person Accounts, and Leads

Create survey invitations for contacts, person accounts, and leads from their records.

Use Digital Engagement Channels to Distribute Surveys

Share survey invitations with a wider audience on WhatsApp and Facebook Messenger, and allow participants to respond on the go by sharing invitation links in an SMS.

Use Rules to Target Survey Participants

Survey Invitation Rules allow you to send rule-based surveys when a record is created or updated for a Survey Subject supported object. Add a customer engagement context to the rule to collect information about the groups that are targeted.

Embed a Survey on a Webpage or in a Chat Window

Make your survey available to site visitors and through support channels by embedding them on a webpage or in a chat window.

Considerations for Sending Email Invitations to Gather Feedback on Support Cases

Review these considerations and follow these best practices when you send survey invitation emails to customers to get feedback on their support experience.

Send Surveys During a Marketing Campaign

Use the Survey Invitation object in Journey Builder to send survey invitations as part of a marketing campaign.

Set an Expiration Date for Your Survey Invitation

Add, change, or remove an expiration date for an invitation at any point during its lifecycle.

Discover Ways to Help Improve Survey Response Rates

Personalize surveys for each participant, show only relevant pages and questions, speed participants through your survey, and increase your survey's visual appeal.

Send Survey Invitation Links

Generate a survey invitation link, configure the invitation settings to control your survey's security, and send the invitation to participants.

1. In the Survey Builder, click **Send**, and then click **Get Invitation**.
2. Select whether you want to send your survey to participants inside or outside your company.
3. Configure the settings for the survey invitation.

Setting	Available for:	Description
Anonymize responses	• Participants in your company • Participants outside your company	Participants can take the survey without revealing their name or other identifying information. Participants can submit their response multiple times.
Let participants see their responses	Participants in your company	Participants with Salesforce accounts in your org can access their response record in Salesforce after completing the survey.
Don’t require authentication	Participants outside your company	Participants can take the survey without logging in to Salesforce or an Experience Cloud site.
Unique link	• Participants in your company • Participants outside your company	Each participant receives a unique invitation link. The participant’s name is associated with their response record. They can respond to the unique invitation only one time. Use a unique link only when you send an email invitation. When sending invitations using Flow or Process Builder, use a unique link to create invitations that don't require participants to log in.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To generate an invitation link:

- Permissions to create surveys

4. Copy the survey link, and send it to your participants.

   Note: Make sure that you give Read permission on the Contact object to participants who access the survey from a site.

   For anonymous surveys, the invitation record isn't associated with the lead, contact, person account, or user account related to the participant record.

SEE ALSO:

Specify the Survey Language for External Participants

Email Survey Invitations to Individuals

Email Survey Invitations to a Group of Participants

Add a Survey to Any Lightning Record Page

Send Survey Invitations by Email

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Email survey invitations to individual participants using their email address, or to a group of participants using a list. Use invitation templates that include the survey question or a link to the survey, customize the templates, or compose your own email invitation.

Participants who opt out of receiving emails don't receive survey invitation emails generated by the Survey Builder or by an automated process, such as the Process Builder, Flows, or Support Settings.

The survey invitation emails you send to participants outside your org count toward your daily email limit. For more information on email limits, see Mass Email Limitations. To increase email limits for your org, contact your Salesforce representative.

Set Up Salesforce Email Composer to Use with Surveys

Use Salesforce Email Composer to email survey invitations and to export survey responses by email.

Email Survey Invitations to Individuals

For surveys with fewer participants, email the survey invitation by manually adding each address. You can email individual survey invitations to leads, contacts, or users in your Salesforce org. The invitation can include a single embedded survey question or a link to open the survey.

Email Survey Invitations to a Group of Participants

Target a large audience by sending survey invitations to a group of participants using an object list view. The invitation can include a single embedded survey question or a link to open the survey.

Customize the Survey Invitation Email Templates

Edit the survey invitation templates to reflect your company's voice and style, and create templates for different types of surveys or projects.

SEE ALSO:

Organization-Wide Email Addresses

Knowledge Article: Increase your daily Mass Email limit

Knowledge Article: Increase the Daily Single Email Message limit for your organization

Opting Out of Email

Set Up Salesforce Email Composer to Use with Surveys

Use Salesforce Email Composer to email survey invitations and to export survey responses by email.

1. From your personal settings, enter `My Email Settings` in the Quick Find box, and then select **My Email Settings**.
2. As your email editor, select **Salesforce Email Composer**.
3. Save your changes.

Note: To send and receive emails using Gmail™ or Office 365™, connect with the email client first.

SEE ALSO:

Send Through Salesforce

Send Email Through Gmail™ or Office 365™ in Lightning Experience

Access Your Personal Settings in Lightning Experience

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Email Survey Invitations to Individuals

For surveys with fewer participants, email the survey invitation by manually adding each address. You can email individual survey invitations to leads, contacts, or users in your Salesforce org. The invitation can include a single embedded survey question or a link to open the survey.

1. In the Survey Builder, click **Send**, and then click **Send Email**.
2. Select a question to embed, or select the survey link. You can embed like or dislike, Net Promoter Score (NPS), rating, or score questions. Then, click **Next**.
3. Select **Send to Individuals** and click **Next**.
4. By default, Salesforce sends the invitation from your user email address. If desired, change the From email to an organization-wide email address instead.
5. In the To field, enter the email addresses of the participants. You can include up to 50 email addresses, separated by commas.
6. Customize the subject.
7. Customize the email body.

   Note: Don't edit or delete the merge fields containing the survey question or the survey link. However, you can add other merge fields to personalize your email.

8. Click **Next**.
9. Configure the invitation link settings and click **Send**.
   Salesforce sends the survey invitation using the Email global action.

SEE ALSO:

Send Survey Invitation Links

Global Quick Actions

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To send an email invitation:

- Permissions to create surveys
- Send Email

Email Survey Invitations to a Group of Participants

Target a large audience by sending survey invitations to a group of participants using an object list view. The invitation can include a single embedded survey question or a link to open the survey.

1. In the Survey Builder, click **Send**, and then click **Send Email**.
2. Select a question to embed, or select the survey link. You can embed like or dislike, Net Promoter Score (NPS), rating, or score questions. Then, click **Next**.
3. Select **Send to a List**.
4. Define the list.
   a. Select the object that contains a list view of survey participants, such as Account, Case, Contact, or Lead.
   b. Select a list view for the object.

      You can send survey invitations using a list view of up to 3,000 recipients.

      Note: If you select a Contact list view, make sure that the list view has only active contacts. The survey invitation isn't emailed even if one of the contacts is inactive.
   c. Select the field to use to identify the recipients. For example, to send the invitation to account owners, select `Account.Owner.Id`.
   d. Optionally, select a record to associate with the invitation. For example, to associate the parent account with the survey invitation, select `Account.Parent.Id`.

      Resolution of merge fields in surveys and conditions of data maps is based on the associated record.
5. Click **Next**.
6. By default, Salesforce sends the invitation from your user email address. If desired, change the From email to an organization-wide email address instead.
7. Customize the subject.
8. Customize the email body.

   Note: Don't edit or delete the merge fields containing the survey question or the survey link. However, you can add other merge fields to personalize your email.
9. Click **Next**.
10. Configure the invitation link settings and click **Send**.

    Note: If you enable the Don't require authentication option for a Contact object's list view, make sure that all contacts in that list have an email address.

    Salesforce sends the invitation using the Email global action.

SEE ALSO:

Send Survey Invitation Links

Global Quick Actions

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To send an email invitation:

- Permissions to create surveys
- Send Email

Customize the Survey Invitation Email Templates

Edit the survey invitation templates to reflect your company's voice and style, and create templates for different types of surveys or projects.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

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From the App Launcher, search for and then select **Email Templates**. Then, select one of the survey invitation email templates to edit or clone it.

Embed_a_Survey_Link
Includes a link to the survey in the body of the email.

Embed_a_Survey_Question
Includes two merge fields in the body of the email to embed a like or dislike, Net Promoter Score (NPS), rating, or score question: `{{{SurveyQuestion.QuestionName}}}` and `{{{SurveyQuestion.QuestionHtmlContent}}`.

Keep in mind these considerations when customizing or creating survey invitation templates.

- Don't edit or remove the survey link or the question merge fields.
- When cloning a template, for Related Entity Type, select Survey Question.
- If you accidentally corrupt or delete one of the original templates, you can re-create it by disabling and then re-enabling Surveys in Setup.
- You can have up to 4,000 characters in the body of an email template.

Note: If you're using a free org, you can have up to 500 email templates, of any kind, in that org.

SEE ALSO:

Email Templates in Lightning Experience

Email Templates in Salesforce Classic

Enable Surveys and Configure Survey Settings

Send Survey Invitations Using Process Builder

Use the Send Survey Invitation action type in Process Builder to email survey invitations to leads, contacts, and users in your org.

EDITIONS

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Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

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Important: Keeping the upcoming retirement of Process Builder in mind, we recommend building new automation in Flow. For more information, see Go with the Flow: What's Happening with Workflow Rules and Process Builder?.

The survey invitation record is associated with the new or changed record that started the process. For information about configuring the Send Survey Invitation action type, see Send a Survey Invitation from a Process.

Email invitations for participants who opt out of receiving emails aren't generated by the Process Builder.

Note: To delete a survey version that's used in a process, delete the process first, and then delete the survey version.

SEE ALSO:

Add the Survey Invitations and Responses Related List to Object Record Pages
Define Default Settings
Create a Process
Opting Out of Email
Go with the Flow: What’s Happening with Workflow Rules and Process Builder?

Send Survey Invitations Using Flows

Use Flow Builder to automatically send email survey invitations to leads, contacts, and users in your org based on an action, such as when a customer support case closes.

For information about how to create an action to send survey invitations from Flow Builder, see Flow Core Action: Send Surveys.

Flow Builder doesn't send email invitations to participants who opt out of receiving emails.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

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Share a QR Code that Contains a Survey Invitation Link

Download a QR code that contains a survey and share it with participants in printed marketing materials or for easy access from mobile devices.

1. In the Survey Builder, click **Send** and then click **Get Invitation**.
2. Select whether you want a survey link for participants inside or outside your company.
3. Configure the invitation link settings.
4. Click **Download QR Code**.

   For anonymous surveys, the survey invitation record contained by the QR code isn't associated with the lead, contact, person account, or user record that's related to the participant.

Share the QR code with participants via a channel of your choice.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To download QR code

- Permissions to create surveys

Generate Survey Invitations for Contacts, Person Accounts, and Leads

Create survey invitations for contacts, person accounts, and leads from their records.

Make sure to select an Experience Cloud site in Survey Settings before generating a survey invitation link.

1. Open the contact, person account, or lead record for the participant.
2. Click the **Get Survey Invitation** quick action.
3. Select the survey and the related record.

   The survey invitation is associated with the related record. Say, for example, that you're creating an invitation for a survey that's related to a support case. For related record, select **Case** and then search for and select the participant's case record.
4. Configure the invitation settings.
5. To populate the invitation link, click **Generate Invitation**.
6. Copy the survey invitation link and then click **Done**.
   The quick action creates a Survey Subject record. Survey Subject records aren't available in Lightning Experience.

To send the survey invitation link to the contact, person account, or lead from one of those record pages, go to the Email composer on the Activity tab of the record. Or send the survey invitation link using any other channel.

SEE ALSO:

Add the Survey Invitations and Responses Related List to Object Record Pages

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

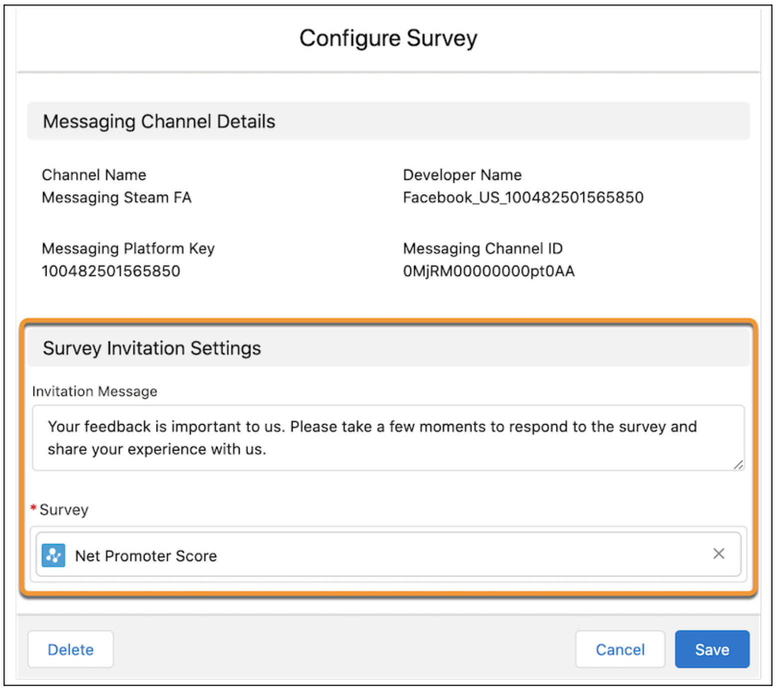
To generate survey invitations:
- Permissions to create surveys

To associate a record with a survey invitation:
- Read, Create, Edit, and Delete permissions on the Survey Subject object

Use Digital Engagement Channels to Distribute Surveys

Share survey invitations with a wider audience on WhatsApp and Facebook Messenger, and allow participants to respond on the go by sharing invitation links in an SMS.

1. From Setup, in the Quick Find box, enter `Messaging`, and then select **Messaging Settings**.
2. Click the action menu for a messaging channel and select **Configure Survey**.
3. In the Survey Invitation Settings section, add a message to send with the invitation and select the survey to send.



Note: Salesforce Feedback Management doesn't support translating the invitation message.

4. Save your changes.
   At the conclusion of a chat session in the digital engagement channel, Salesforce Feedback Management sends the survey invitation. The invitation sent is based on the type of user associated with the chat session, such as end user contact, case contact, or lead ID. A subject is associated with the invitation when the messaging session uses any of these objects:
   - Case
   - Lead
   - End User Account
   - Opportunity
   - End User Contact
   - Case Contact
   - Messaging Session

SEE ALSO:

Set Up Messaging

MessagingSession

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To configure a survey invitation for a digital engagement channel:

- Customize Application

Use Rules to Target Survey Participants

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To create survey invitation rules:
- Manage Flows

To generate survey invitations:
- Profile that allows the user to create and send surveys

To associate a record with a survey invitation:
- Read, Create, Edit, and Delete permissions on SurveySubject records

Survey Invitation Rules allow you to send rule-based surveys when a record is created or updated for a Survey Subject supported object. Add a customer engagement context to the rule to collect information about the groups that are targeted.

Make sure to select an Experience Cloud site in Survey Settings before creating a survey invitation rule.

Survey invitation rules can be created with or without the customer engagement context. But to add a customer engagement context, you must create a Custom Metadata Type and define the required parameters of the engagement context. Then, enable the engagement context on page 52 in the survey. Next, create a survey invitation rule with the trigger conditions and map the engagement context, if necessary.

1. From Setup, in the Quick Find box, enter `Survey Invitation Rules`, and then click **Survey Invitation Rules**.
2. Click **New Rule**.
3. In the Configure a survey trigger window, define the required settings.

Setting Name	Description
Name	Give a name to the rule.
API Name	The API name that is auto generated based on the rule name.
Description	Optional. Provide a brief description of the purpose of the rule.
Action	Select an action that results in the trigger of the survey to the participants.
Object	Select a SurveySubject object that you want to associate with the rule.
Record Type	Optional. Select the type of record that gets created or updated for the object. The field is enabled only when a type is associated with the object.
Field	Select a field associated with the SurveySubject object that you choose.
Value	Select a value associated with the selected field.
Survey	Select a survey that you want to send to the participants when the conditions are met.
Recipient	Choose a survey recipient.
Survey Invitation Engagement Context	Optional. If there's an engagement context configured on page 52 for the survey, then

Setting Name	Description
	you can select the parameters that you want to focus on with the survey.

4. Click **Preview Survey** for a temporary execution of the survey.
5. Save your changes, and then click **Activate**.

   To update the rule, deactivate it.

SEE ALSO:

Define Default Settings

Embed a Survey on a Webpage or in a Chat Window

Make your survey available to site visitors and through support channels by embedding them on a webpage or in a chat window.

Note: You can only gather feedback from active surveys.

Include Surveys In a Chat Window

Configure chat sessions to open surveys from a website by adding the site as a trusted domain and enabling iframes.

Embed a Survey on a Webpage

Include a survey on a webpage so that site visitors can respond to it.

Gather Feedback at the End of a Customer Support Chat Session

Add a post-chat survey to a chat window so that customers can provide feedback in the window at the end of their session.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

Include Surveys In a Chat Window

Configure chat sessions to open surveys from a website by adding the site as a trusted domain and enabling iframes.

Note:

- With the Feedback Management - Starter license, you can configure chat sessions to open surveys only from Experience Cloud sites.
- With the Feedback Management - Growth license, you can configure chat sessions to open surveys from Experience Cloud sites and external websites.

1. From Setup, enter `Session Settings` in the Quick Find box, then select **Session Settings**.
2. In the Trusted Domains for Inline Frames section, click **Add Domain**.
3. Enter the URL of your website and for IFrame Type, select **Surveys**.
4. Save your changes.

SEE ALSO:

Gather Feedback at the End of a Customer Support Chat Session

Embed a Survey on a Webpage

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To add a trusted domain:

- Customize Application

Embed a Survey on a Webpage

Include a survey on a webpage so that site visitors can respond to it.

Note:

- With the Feedback Management - Starter license, you can include survey only on Experience Cloud sites.
- With the Feedback Management - Growth license, you can include surveys on Experience Cloud sites and external websites.

To embed a survey on a webpage, add the URL of the website that hosts the survey as a trusted website. Then generate a survey invitation, and add this iframe tag in the HTML code of the webpage: `<iframe src="embed_the_survey_invitation_url"></iframe>`.

Example: An example of the survey invitation link with the iframe tag is `<iframe" src="https://samplesurveyinvitation.com/invitationID=testinvitation&surveyname=casesolved&UID=817cb13e-e01-4987-a199-9c767092"></iframe>`

SEE ALSO:

Include Surveys In a Chat Window

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

Gather Feedback at the End of a Customer Support Chat Session

Add a post-chat survey to a chat window so that customers can provide feedback in the window at the end of their session.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

Note:

- With the Feedback Management - Starter license, you can configure chat sessions to open surveys only from Experience Cloud sites.
- With the Feedback Management - Growth license, you can configure chat sessions to open surveys from Experience Cloud sites and external websites.

To embed a survey in a chat window on an external website or an Experience Cloud site, add the URL of the website that hosts the survey as a trusted website. Then select the survey in the corresponding embedded service deployment.

Tip: To send postchat surveys to users in your Salesforce org, the embedded service deployment can't have a pre-chat form configured.

Keep in mind these considerations when embedding a survey in a chat window.

- You can use only active surveys to gather post-chat feedback.
- An unauthenticated survey invitation is generated each time a customer chooses to provide feedback.
- If the pre-chat form is configured to associate customer information with Salesforce records, the survey invitation record is associated with the same Salesforce records.

For information about adding a survey to the end of a chat session in an embedded service deployment, see Customize Post-Chat with Surveys.

SEE ALSO:

- Add the Survey Invitations and Responses Related List to Object Record Pages
- Embedded Chat
- Customize Post-Chat Surveys
- Include Surveys In a Chat Window

Considerations for Sending Email Invitations to Gather Feedback on Support Cases

Review these considerations and follow these best practices when you send survey invitation emails to customers to get feedback on their support experience.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Keep in mind these considerations when you send survey email invitations to gather feedback on cases.

- In Surveys Setup, make sure that you've selected a default Experience Cloud site for public survey invitations.
- You can generate survey invitations only for cases with a related contact. The contact receives the invitation.
- With the survey open in Survey Builder, go to Default Settings to specify the content of the email invitation. If you don't define the survey's email settings, the content of the invitation depends on the types of questions in the survey.
  - If the survey contains one Net Promoter Score (NPS), one rating, and one score question, the email invitation includes all of the questions.
  - If the survey contains multiple Net Promoter Score (NPS), rating, and score questions, the email invitation includes one question of each type.
  - If the survey doesn't contain a Net Promoter Score (NPS), rating, or score question, the invitation includes a link to the survey.
- Each invitation is unique. When a participant responds, their contact name is included in the response record.
- Each invitation is related to the case record and to the case owner record.
- Invitations expire in 90 days.

For information about creating feedback surveys for cases, see Set Up a Customer Feedback Survey.

SEE ALSO:

Add the Survey Invitations and Responses Related List to Object Record Pages

Define Default Settings

Send Surveys During a Marketing Campaign

Use the Survey Invitation object in Journey Builder to send survey invitations as part of a marketing campaign.

USER PERMISSIONS

To generate survey invitations:
- Permissions to create surveys

To create and publish journeys:
- General Access, View
- Automation Create, Edit

Make sure to select an Experience Cloud site in Survey Settings before creating a journey.

1. In Journey Builder, click **New Journey**, and then select **Create New Journey**.
2. Drag **Object Activity** onto the canvas, and click it.
3. Select the **Survey Invitation** object, and click **Next**.
4. Select **Create New**, and then click **Next**.
5. Define the Map Fields.

   Can Respond Anonymously

   If selected, Salesforce doesn't store the survey participant's name.

Can See Their Response
If selected, participants can see their responses after they submit the survey.

Let Guest Respond
If selected, survey participants don't have to be members of your org.

Name
The name of the survey that you want to invite participants to take.

Survey ID
The unique identifier for the survey that you're inviting participants to take.

Invitation Expires On
The date that the survey invitation expires.

Is Default
Makes the invitation the default invitation that's sent for the survey.

Network ID
The unique identifier for the Experience Cloud site associated with the survey.

Owner ID
A unique identifier for the user who creates the invitation.

Participant ID
The unique identifier for the field you're using to send invitations.

Survey Email Branding ID
The unique identifier for the invitation's configuration settings.

6. Click **Next**, review your settings, name the activity, and click **Done**.

SEE ALSO:
Object Activity in Journey Builder

Set an Expiration Date for Your Survey Invitation

Add, change, or remove an expiration date for an invitation at any point during its lifecycle.

You can set an expiration date for a survey invitation in any of these ways.

- When sending an email invitation from the Survey Builder
- When sending an email invitation from a contact or a person account record
- On the survey invitation record
- When using the Send Survey Invitation action in Process Builder

Invitations expire at 23:59:59 UTC (Coordinated Universal Time) on the expiration date.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Discover Ways to Help Improve Survey Response Rates

Personalize surveys for each participant, show only relevant pages and questions, speed participants through your survey, and increase your survey's visual appeal.

To ...	Try This
Personalize surveys for each participant	• Use merge fields on page 34 • Insert responses from previous questions on page 26
Show the relevant survey pages and questions to each participant	• Show survey pages based on responses on page 31 • Show questions based on responses to questions on the same page on page 30
Reduce the number of clicks for participants	• Enable Auto-Progress to the next survey page on page 29 • Create a survey that participants can complete from the email invitation on page 38
Provide survey context within the email invitation	Email survey invitation on page 56
Increase the survey's visual appeal	Insert images in survey pages on page 49

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Share and Relate Survey Records

Enable users to view their survey invitations and responses by sharing those records. Check the users who have access to survey records. Relate Salesforce records to survey invitation records.

Share Surveys with Users
Collaborate with your team when designing surveys by manually sharing survey records with them.

Share Survey Invitations with Users
Allow users to view their survey invitations and responses on the Analyze tab of the Survey Builder and in reports based on the Survey Question Score object.

View the List of Users with Survey Access
View the list of users who have access to a survey and details of the user access, such as the type of user, reason for granting access, relationship, and access level.

Relate Records to Survey Invitations and Responses
Relate Salesforce records to survey invitations manually or automatically. When participants respond, their response record is automatically related to their invitation and to their Salesforce record.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Share Surveys with Users

Collaborate with your team when designing surveys by manually sharing survey records with them.

1. On a survey record page, click **Sharing**.
2. Select a user type, and then search for a user, group, or role and subordinates with whom you want to share the survey invitation.
3. Select Read/Write access to the survey.
4. Save your work.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Share Survey Invitations with Users

Allow users to view their survey invitations and responses on the Analyze tab of the Survey Builder and in reports based on the Survey Question Score object.

1. On a survey invitation record page, click **Sharing**.
2. Select a user type, and then search for a user, group, or role and subordinates with whom you want to share the survey invitation.
3. Select Read/Write access to the survey invitation.
4. Save your work.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

SEE ALSO:

Share and Grant Access to Surveys

View the List of Users with Survey Access

View the list of users who have access to a survey and details of the user access, such as the type of user, reason for granting access, relationship, and access level.

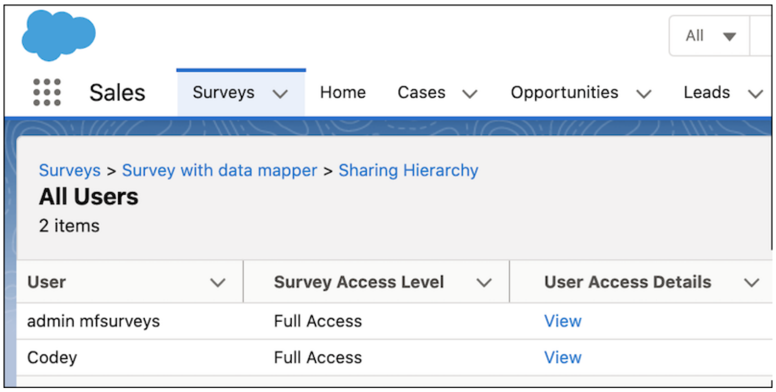
EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

1. On a survey record page, click **Sharing Hierarchy**.



2. To view the access details for a user, click **View**.

Relate Records to Survey Invitations and Responses

Relate Salesforce records to survey invitations manually or automatically. When participants respond, their response record is automatically related to their invitation and to their Salesforce record.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

To manually relate a participant's Salesforce record to a survey invitation, click the **Get Survey Invitation** quick action on any contact, person account, or lead record. Then, select a survey and a related record and save your changes.

When you generate survey invitations by using Process Builder, to gather feedback on support cases, or to gather feedback at the end of a customer support web chat session, Salesforce automatically relates the participant's record to the survey invitation.

Add the Survey Invitations and Responses related list to contact, person account, and lead record pages to easily see related invitations and responses.

SEE ALSO:

Add the Survey Invitations and Responses Related List to Object Record Pages

Track Satisfaction Across a Customer's Lifecycle

Understand how participants feel about your company, product, or service throughout their customer journey by tracking satisfaction metrics with Customer Lifecycle Maps.

Use Customer Lifecycle Maps to define stages of participants' engagement with your company or products, and associate NPS or customer satisfaction scores with each stage. Create multiple maps to track different types of participant experiences.

Note: You can see visualizations of satisfaction scores with the Customer NPS Lifecycle Map and Customer Satisfaction Lifestyle Map dashboards in the Customer Lifecycle Analytics app.

Before you create a customer lifecycle map, complete the prerequisites.

- Plan the customer lifecycle stages.
- Create one or more surveys that contain the questions that you want to send to customers at each stage.
- Enable Customer Lifecycle Maps in your org.
- Make sure that you've selected an email template for any survey that you're using in a map in the survey's Default Settings.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

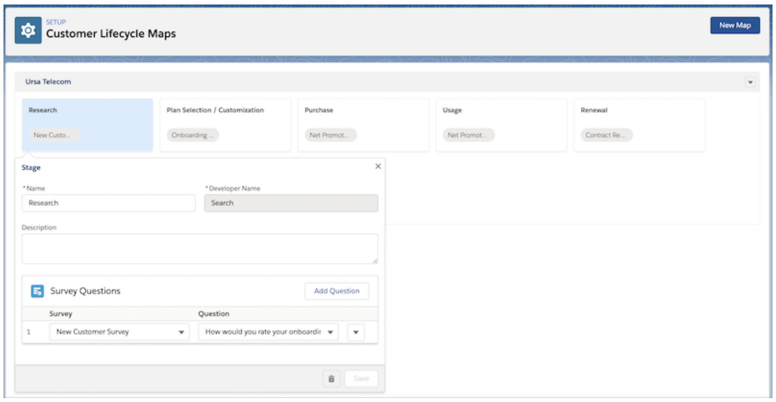
Available with the Feedback Management - Starter and Feedback Management - Growth licenses

1. From Setup, in the Quick Find box, enter `Survey`, then select **Customer Lifecycle Maps**.
2. Click **New Map**.
3. Enter a descriptive name and then press Tab to automatically populate the developer name.
4. Enter a description and select whether you want to track NPS or CSAT as the customer satisfaction metric.
5. Save your changes.
6. Click **New Stage**.
7. Enter a descriptive name and then press Tab to automatically populate the Developer Name.
8. Optionally, enter a description
9. Select the survey and one or more questions to include in the stage. You can select either NPS or rating questions, depending on the map's customer satisfaction metric.
10. Click the action menu for any question to create an invitation rule that sends the survey.

    Note: You can also use the Send Survey Invitation action in Process Builder to automatically send survey invitations during a stage.

11. To add another question, click **Add Question**.
12. To delete a question, click the action menu for the question and select **Remove Question**.
13. Save your changes.

Example: A telecommunications company uses Customer Lifecycle Maps to track its customers NPS scores. The company sends different questions to customers at five lifecycle stages.



1. In the Research stage, the company asks customers to rate their onboarding experience.
2. In the Plan Selection / Customization stage, the company asks customers to rate the likelihood that they'd recommend the company to a friend.
3. In the Purchase stage, the company asks customers to rate the likelihood that they'd recommend the product or service they purchased to a friend.
4. In the Usage stage, the company asks customers to rate the likelihood that they'd recommend the company to a friend.
5. In the Renewal stage, the company asks customers to rate their experience in renewing their service.

Analyze Survey Responses

Gain insights into responses by using the Analyze tab in the Survey Builder to view and export response data.

Note: A survey response is created when an individual responds to one or more questions from a survey. An individual can be an authenticated user or unauthenticated guest user.

Survey responses must be used between the beginning and ending dates of your subscription. Unused survey responses don't roll over to the following month.

[View Survey Response Data](#)
View completion metrics and response data on the Analyze tab of the Survey Builder.

[Export Survey Responses](#)
Export responses for a survey version from the Analyze tab of the Survey Builder. Enable Survey Owners Can Manage Responses on the Survey Settings page to enable survey record owners to export responses associated with their invitations.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

View Survey Response Data

View completion metrics and response data on the Analyze tab of the Survey Builder.

The Analyze tab of the Survey Builder collates survey responses in easy-to-read charts for each type of question. If you don't see the information you're looking for on the Analyze tab, create a custom report type for survey responses.

Salesforce automatically updates question scores as soon as a response is registered, except when a participant changes or deletes a response they already submitted. To view updated responses, see the value in the Survey Question Response object.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Export Survey Responses

Export responses for a survey version from the Analyze tab of the Survey Builder. Enable Survey Owners Can Manage Responses on the Survey Settings page to enable survey record owners to export responses associated with their invitations.

1. With a survey open in the Survey Builder, go to the Analyze tab.
2. Select the version for which you want to export responses.
3. Click **Export Responses**.
4. Define your filter criteria, and click **Send Email**.
5. To export responses related to a particular object, select the object from the Associated Object menu.
6. Download the response file from the email you receive.

   Note: You can also share, download, and delete the response file from the Owned by Me section of Files in your org.

The header in the response table of the exported .csv file contains all the survey questions. Each row contains a participant's response to each question in the survey. If the survey contains ranking or multiple selection questions, the response table contains another row after the header: The row lists ranking items for the ranking questions and answer choices for the multiple selection questions. For a ranking question, each response row contains the rank provided by the participant for each ranking item. For a multiple selection question, each response row contains the answer choices selected by the participant. If a cell storing an answer choice is empty, it means that the participant didn't select that answer choice.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

USER PERMISSIONS

To export survey responses:

- Permissions to create surveys

SEE ALSO:

Salesforce Files

Analyze Survey Responses to Get Sentiment Insights

Get insight into the sentiment behind text-based survey responses. Create an AWS account and enable Sentiment Insights. Then create a data map and then use a Flow action or template to analyze the sentiment that underlies survey responses.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

Create an AWS Account and Assign Permissions
Create an Amazon Web Services (AWS) account to use with Sentiment Insights.

Enable Sentiment Insights
Set up Sentiment Insights to get actionable insights on customer sentiment based on survey responses.

Create Survey Data Maps for Sentiment Insights
Create a data map to use to analyze the sentiment of survey responses.

Use a Flow Action to Get Sentiment Insights
Use the Perform Survey Sentiment Analysis action in Flows to trigger the Amazon Comprehend API. The Amazon Comprehend API uses your survey data map to processes survey responses, and creates or updates AI Sentiment Result records with insights about the sentiment of the responses.

Use Flow Templates to Get Sentiment Insights
Feedback Management provides two Flow templates that help analyze the sentiment of survey responses. You can use them as is or customize them to suit your needs.

Create an AWS Account and Assign Permissions

Create an Amazon Web Services (AWS) account to use with Sentiment Insights.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions of Financial Services Cloud with the Feedback Management - Starter and Feedback Management - Growth licenses

For Sentiment Insights to function properly, create a dedicated AWS account to use with it.

Important: Charges for AWS services are based on the pricing agreement between your organization and AWS.

1. Create an AWS account.
2. Create an IAM user in your AWS account.
3. Add the Amazon Comprehend permissions to the IAM user.

SEE ALSO:

Create an AWS Account and Assign Permissions
Create a Named Credential
Enable Sentiment Insights
Bring Your Own Amazon Account FAQ

Enable Sentiment Insights

Set up Sentiment Insights to get actionable insights on customer sentiment based on survey responses.

Before enabling Sentiment Insights, create a named credential for your Amazon Web Services (AWS) account.

1. From Setup, in the Quick Find box, enter `Industries Einstein`, and then select **Sentiment Insights**.
2. Click **Use Your Own AWS Account**.
3. To accept the notification and terms of use, click **Accept & Continue**.
4. Select the named credential that you created for your AWS account and save your work.
5. Enable Sentiment Insights.

You can change the named credential, if necessary.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions of Financial Services Cloud with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To enable Sentiment Insights:

- System Administrator profile

Create Survey Data Maps for Sentiment Insights

Create a data map to use to analyze the sentiment of survey responses.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To create or update data maps:

- Create and send survey permissions
- Read and Create permission for the objects whose records the data map creates or updates
- Read and Create permission for fields that the data map creates or updates
- Read permission for records with mapped ID

To view data maps:

- Read permission for the Survey object

1. Open the survey whose responses you want to analyze for sentiment insights.
2. In the Survey Builder, click **Advanced Settings**, and then select **Survey Data Mapping**.
3. Click **New Mapping**.
4. Name the mapping.
5. Select how you want to process responses.
   - To process survey responses in real time, select **Create record**.
   - To process survey responses in bulk at a later time, select **Update record**.
6. For Target Object, select **AI Sentiment Result**.
7. Select the Condition Type.
   a. To always create records from responses, select **Every time**.
   b. To define rules that determine when to create records, select **Based on conditions**, and then define the conditions.
8. Specify values for the predefined AI Sentiment Result fields.
   a. For Name, enter a name for the AI Sentiment Result record.
   b. For Service Type, select **Amazon Comprehend DetectSentiment**.
   c. For Source Text Field, select **Response Value** .
      The value in the Source Text Field is analyzed for its sentiment. Selecting Response Value ensures that participants' responses to text questions are analyzed.
   d. For Source Text Language, select the language in which participants respond to the survey.
      - If all the participants can respond to the survey in a single language, select that language as the value.
      - If participants can respond to the survey in multiple languages, select the language of the related survey responses. To do so, for Information Type, select **Response Fields**, and for Value, select **Language**.
9. Specify the field and value for the AI Sentiment Result object's Source Object ID.
   a. Click **Add Row**.
   b. For Target Object Field, select **Source Object ID**.
   c. Select the text question whose responses you want to analyze.
10. Specify the field and value for the AI Sentiment Result's Status.
    a. Click **Add Row**.
    b. For Target Object Field, select **Status**.
    c. To process survey responses in real time, select **Submitted** as the target object field's value. To process survey responses in bulk at a later time, select **Draft**.
11. Save the mapping and the survey.

Use the Flow action or a template to process survey responses.

SEE ALSO:

Create Survey Data Maps to Create or Update Records

Use a Flow Action to Get Sentiment Insights

Use the Perform Survey Sentiment Analysis action in Flows to trigger the Amazon Comprehend API. The Amazon Comprehend API uses your survey data map to processes survey responses, and creates or updates AI Sentiment Result records with insights about the sentiment of the responses.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.
2. Click **New Flow**.
3. Select a flow type, and then click **Create**.
4. Select a layout.
5. Add the **Action** element.
6. From the Category section, select **Surveys**.
7. Search and select the **Perform Survey Sentiment Analysis** action.
8. Provide a name, an API name, and description for the action.
9. Specify the input values and click **Done**.
10. Save your changes, and then activate the flow.

SEE ALSO:

Flow Core Action: Perform Survey Sentiment Analysis

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To create a flow:
- Manage Flows

Use Flow Templates to Get Sentiment Insights

Feedback Management provides two Flow templates that help analyze the sentiment of survey responses. You can use them as is or customize them to suit your needs.

Use the Perform Survey Sentiment Analysis Flow Template
Use the Perform Survey Sentiment Analysis Flow template to understand the sentiment underlying the responses to text-based survey questions for all the survey version records in your org.

Use the Perform Survey Sentiment Analysis for User-Selected Question Flow Template
Use the Perform Survey Sentiment Analysis for User-Selected Question Flow template to understand the sentiment underlying the responses to text-based survey questions for all surveys that meet the specified criteria.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

Use the Perform Survey Sentiment Analysis Flow Template

Use the Perform Survey Sentiment Analysis Flow template to understand the sentiment underlying the responses to text-based survey questions for all the survey version records in your org.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To use the template flow:
- System Administrator profile

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.
2. Click **New Flow**.
3. Select a flow type, and then click **Create**.
4. Select a layout.
5. Add the **Subflow** element.
6. Search and select the **Perform Survey Sentiment Analysis** flow.
7. Provide a name, an API name, and description for the subflow.
8. Turn on the toggle to include input values and provide the values.
   a. For End Date, select the date until when participant responses are processed to get sentiment insights.
   b. For Operation Type, select the action performed on the AI Sentiment Result records.
      - Use the create operation when sentiment analysis is yet to be done on survey responses and there are no associated AI Sentiment Result records, or to analyze the sentiment again. After the processing is completed, AI Sentiment Result records are created with the sentiment of the survey responses and with the Submitted status.
      - Use the update operation to bulk process survey responses that have associated AI Sentiment Result records in Draft status. After the processing is completed, the AI Sentiment Result records are updated with the sentiment of the survey responses and their status is changed to Submitted.
   c. For Start Date, select the date from when participant responses are processed to get sentiment insights.
   d. For Survey ID, provide the IDs of the survey containing questions for whose responses you want to get sentiment insights.
9. Click **Done**.
10. Save and activate the flow.
    The flow uses the Perform Survey Sentiment Analysis action to call the Amazon Comprehend API, which analyzes survey responses and creates or updates AI Sentiment Result records with insights about the sentiment of the responses.

Use the Perform Survey Sentiment Analysis for User-Selected Question Flow Template

Use the Perform Survey Sentiment Analysis for User-Selected Question Flow template to understand the sentiment underlying the responses to text-based survey questions for all surveys that meet the specified criteria.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Feedback Management - Starter and Feedback Management - Growth licenses

USER PERMISSIONS

To use the template flow:
- System Administrator profile

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.
2. Open the Perform Survey Sentiment Analysis for User-Selected Question template.

   This Flow template is a Screen Flow.
3. In the Specify Survey Criteria Screen element, specify the criteria for the surveys for which you want to get sentiment insights.
   a. Specify the survey containing the questions for whose responses you want to get sentiment insights.
   b. Specify the action performed on the AI Sentiment Result records.
      - Use the create operation when sentiment analysis is yet to be done on survey responses and there are no associated AI Sentiment Result records, or to analyze the sentiment again. After the processing is completed, AI Sentiment Result records are created with the sentiment of the survey responses and with the Submitted status.
      - Use the update operation to bulk process survey responses that have associated AI Sentiment Result records in Draft status. After the processing is completed, the AI Sentiment Result records are updated with the sentiment of the survey responses and their status is changed to Submitted.
   c. Select the start and end dates of the participant responses for which you want to get sentiment insights.

   The flow gets survey version records of all the surveys that meet the criteria.
4. In the Select questions Criteria Screen element, select the survey questions for whose responses you want to get sentiment insights. The selected questions are queued for processing.
5. In the Confirm Analysis Screen element, confirm the list of survey questions, and submit them for processing to get sentiment insights.
6. To save it as a new flow, click **Save As**.
7. Activate and use the flow.

   The flow uses the Perform Survey Sentiment Analysis action to call the Amazon Comprehend API, which analyzes survey responses and creates or updates AI Sentiment Result records with insights about the sentiment of the responses.

   The user running the flow is notified when the sentiment analysis is completed or if it fails.

Deploy and Use Customer Lifecycle Analytics

Customer Lifecycle Analytics lets you surface survey response metrics anywhere in Salesforce and get instant insight into your customer right from where you work.

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions with the Salesforce Feedback Management Starter and Growth licenses, and as an add-on license for the Survey Response Pack license

Deploy Customer Lifecycle Analytics

Before you create an app from the Customer Lifecycle Analytics template and use the dashboards, deploy Customer Lifecycle Analytics in your Salesforce org.

Use Customer Lifecycle Analytics Dashboards

You can use Customer Lifecycle Analytics Dashboards to gain actionable insights into your customers and answer key questions about your business.

Customer Lifecycle Analytics Base App

With the Salesforce Feedback Management Starter and Growth licenses, your Salesforce org is provisioned with five user licenses for the Customer Lifecycle Analytics Base App.

SEE ALSO:

Customer Lifecycle Analytics Base App

Deploy Customer Lifecycle Analytics

Before you create an app from the Customer Lifecycle Analytics template and use the dashboards, deploy Customer Lifecycle Analytics in your Salesforce org.

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

Tip: Follow the steps in the order shown to deploy Customer Lifecycle Analytics. If you haven't used CRM Analytics before, learn about it from Salesforce Help.

1. Enable CRM Analytics

   Before you create an app from the Customer Lifecycle Analytics template, enable CRM Analytics in your Salesforce org.

2. Assign Customer Lifecycle Analytics Administrator Permissions

   Enable admins to create and manage Customer Lifecycle Analytics app by assigning the relevant permissions.

3. Assign Customer Lifecycle Analytics User Permissions

   Enable users to view the Customer Lifecycle Analytics app by assigning the relevant permissions.

4. The Data Needed to Create the Customer Lifecycle Analytics App

   Your org's data has to meet specific requirements before you can create an app from Customer Lifecycle Analytics template.

5. Set Field-Level Security to Enable Creation of the Customer Lifecycle Analytics App

   Before you create the Customer Lifecycle Analytics app, make sure that the Analytics Integration User has access to all the fields used in the app.

6. Set Up Engagement Channel

   To analyze a survey based on engagement channels, set up the engagement context for the survey. First, create a custom metadata type, add a custom field called Engagement Channel, and then select the new custom metadata type as the survey's engagement context.

7. Create and Share an App from the Customer Lifecycle Analytics Template
   Create an app from the Customer Lifecycle Analytics template, and share it with users in your org.
8. Schedule the Dataflow for the App
   The app creation process includes a dataflow that imports the latest data to Analytics. Schedule the dataflow to be rerun every day to ensure that your app uses up-to-date data.
9. Understand Customer Lifecycle Analytics Limitations
   Customer Lifecycle Analytics gives you access to most of the CRM Analytics capabilities, but with limitations.
10. Embed Customer Lifecycle Analytics Dashboards in Lightning Pages
    Customer Lifecycle Analytics includes dashboards you can embed and access in Lightning Experience pages.

Enable CRM Analytics

Before you create an app from the Customer Lifecycle Analytics template, enable CRM Analytics in your Salesforce org.

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

Note: If you see the **Launch CRM Analytics** button, CRM Analytics is already enabled. You can skip to Assign Customer Lifecycle Analytics Administrator Permissions.

1. From **Setup**, enter `Getting Started` in the **Quick Find** box, and then select **Getting Started**.
2. Click **Enable CRM Analytics**.

Assign Customer Lifecycle Analytics Administrator Permissions

Enable admins to create and manage Customer Lifecycle Analytics app by assigning the relevant permissions.

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

1. From **Setup**, enter `Users` in the **Quick Find** box, and then select **Users**.
2. Click the name of the user who requires administrator access to Customer Lifecycle Analytics.
3. Click **Permission Set Assignments**, and then click **Edit Assignments**.
4. Select permission sets.
   - If you have the Customer Lifecycle Analytics license subscription, select both the **CRM Analytics Plus Admin** and **Customer Experience Analytics Admin** permission sets.
   - If you have the Salesforce Feedback Management license subscription, select **CLA Analytics Base Admin** permission set.
5. Click **Add**, then click **Save**.
6. Repeat Steps 2–5 for all the users who create and manage the Customer Lifecycle Analytics app.

Assign Customer Lifecycle Analytics User Permissions

Enable users to view the Customer Lifecycle Analytics app by assigning the relevant permissions.

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

1. From **Setup**, enter `Users` in the **Quick Find** box, and then select **Users**.
2. Click the name of a user who requires access to Customer Lifecycle Analytics.
3. Click **Permission Set Assignments**, and then click **Edit Assignments**.
4. Select permission sets.
   - If you have the Customer Lifecycle Analytics license subscription, select both the **CRM Analytics Plus User** and **Customer Experience Analytics User** permission sets.
   - If you have the Salesforce Feedback Management license subscription, select **CLA Analytics Base User** permission set.
5. Click **Add**, then click **Save**.
6. Repeat Steps 2–5 for all the users who create and manage the Customer Lifecycle Analytics app.

The Data Needed to Create the Customer Lifecycle Analytics App

Your org's data has to meet specific requirements before you can create an app from Customer Lifecycle Analytics template.

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

Your org must have at least one record in each of the following objects:

- Survey
- SurveyQuestion
- SurveyQuestionResponse
- SurveyVersion
- SurveyInvitation
- SurveySubject
- Account
- SurveyQuestionChoice

While creating the app, if your org's data doesn't meet the minimum requirements, you see a message describing what to fix.

Set Field-Level Security to Enable Creation of the Customer Lifecycle Analytics App

Before you create the Customer Lifecycle Analytics app, make sure that the Analytics Integration User has access to all the fields used in the app.

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

If users don't have proper field-level security permissions when they run a dataflow, the dataflow can fail. Here's how to set Salesforce field-level security to enable the Analytics Integration User to see all fields used in the app.

Important: When the data flow fails, you receive an email with a result log of all possible errors. If there's an error because a field is missing, deprecated, or isn't available for an integration user, set the Salesforce field-level security.

1. From **Setup**, go to **Object Manager**.
2. In the **Quick Find** search box, enter the name of the object whose field-level security you want to edit.
3. Select the object, then select **Fields & Relationships**.

4. Select the field you want to edit, then select **Set Field-Level Security**.
5. Look for Analytics Cloud Integration User, select **Visible**, and click **Save**.
6. Repeat Steps 5 and 6 for all the fields you want to use.
7. Refresh your browser cache.

You can now create the Customer Lifecycle Analytics app.

Set Up Engagement Channel

To analyze a survey based on engagement channels, set up the engagement context for the survey. First, create a custom metadata type, add a custom field called Engagement Channel, and then select the new custom metadata type as the survey's engagement context.

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Developer**, and **Unlimited** Editions where Salesforce Surveys is enabled.

USER PERMISSIONS

To create a custom metadata type:
- Customize Application

To change a survey's default settings:
- Profile that allows the user to create and send surveys

1. Create a custom metadata type called Engagement Key.
   a. From Setup, in the Quick Find box, enter `Custom Metadata Types`, and then click **Custom Metadata Types**.
   b. Click **New Custom Metadata Type**.
   c. For Label, enter `Engagement Key`.
   d. For Plural Label, enter `Engagement Keys`.
   e. Save your changes.
2. Add a custom field called Engagement Channel.
   a. In the Custom Fields section of the Engagement Key page, click **New**.
   b. Select **Picklist**, then click **Next**.
   c. For Field Label, enter `Engagement Channel`.
   d. In the text box, enter the names of channels that your business supports. Enter each value in a new line.

   Note: If you want to use channel names dynamically from another object, leave the text box empty

   e. Click **Next**.
   f. Save your changes.
3. In the survey's default settings, select Engagement Key as the engagement context custom metadata type.
   a. Open the latest version of the survey you want to configure.
   b. Click .
   c. Select **Default Settings**.
   d. From the Content picklist, select the survey question.
   e. From the Email Templates picklist, select the email template.
   f. From the Engagement Context Custom Metadata Type picklist, select **Engagement Channel**.
   g. Save your changes and activate the survey.
4. Set up the Survey Invitation Engagement Context.
   a. From Setup, in the Quick Find box, enter `Customer Lifecycle Maps`, and then click **Customer Lifecycle Maps**.

b. Go to the customer lifecycle map that contains the stage you want to associate the engagement context with.
c. Select the stage and click **Add Question**.
d. Select the survey and the question for the stage.
e. Click , and then select **Invitation Rules**.

   Note: If Invitation Rules is disabled, refresh the page and try again.

f. In the **Configure a survey trigger** window, define the required settings on page 64 that determine when the survey is sent.
g. Add the survey invitation engagement context.
   a. For Context Type, select **Engagement Channel**.
   b. For Data Type, select **Picklist** to use a static value. Or select **Lookup** to use values from another object.
   c. For Context Value, select a channel.
h. Save and activate the trigger.

Create and Share an App from the Customer Lifecycle Analytics Template

Create an app from the Customer Lifecycle Analytics template, and share it with users in your org.

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

1. Navigate to **Analytics Studio**.
2. Click **Create**, then select **App**.
3. Select **Customer Lifecycle Analytics**, and then click **Continue**.
4. Take a quick look at the preview page, and click **Continue** to open the configuration wizard.
5. If you want to create an app or use settings from an existing app, make a selection, and click **Continue**.
6. CRM Analytics performs a compatibility check of your org's data. If it uncovers any issues, you see error messages with instructions for how to address them. Fix the issues, and try app creation again. If it completes successfully, click **Looks good, next**.
7. The next page of the wizard asks you to make three selections.
   a. The first wizard question asks if you'd like to add the pre-configured Einstein Discovery story to the app. To get predictions about the likelihood of survey responses, select **Yes**.

      Note: This capability requires a Customer Experience Analytics Plus subscription. Confirm the subscription with your admin.

   b. Next, the wizard asks if you'd like to add customer lifecycle maps to the app. To add customer lifecycle map dashboards to your app, select **Yes**.

      Note: To add customer lifecycle maps to your app, you must have the Salesforce Feedback Management license.

   c. Next, select the objects associated with survey invitations you want to add to your app. Based on the objects you select, relevant datasets are automatically created in the app.
8. Click **Looks good, next**.
9. Name your app, and click **Create**.

View the status of the app creation on the next page. The process takes a few minutes. After it's complete, refresh the page to see your app.

> Note: If you see an error saying the Analytics Integration User does not have access to selected fields, edit Salesforce field-level security.

Now that you created the app, share it with users in your organization. You can share it only with users assigned with Customer Experience Analytics Admin or Customer Experience Analytics User permission sets.

If you have a Customer Lifecycle Analytics Base subscription, you can share your app with users assigned with CLA Analytics Base Admin or CLA Analytics Base User permission sets.

> Note: By default, any user who can access the dataset can view all the records in it. To restrict user access, apply security predicates to datasets. For information on how to apply security predicates, see Security Predicates for Datasets.

1. Open your app if it's not already open. If you navigated away from Analytics Studio, go back to it, select **All Items**, find your app, and click it.
2. Click .
3. In the next screen, use the search field under **Invite others:** to find other users in your org.
4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.
5. Click **Add**, then click **Save**.

SEE ALSO:

Compare the Supported Capabilities for Each License

Customer Lifecycle Analytics Base App

Schedule the Dataflow for the App

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

The app creation process includes a dataflow that imports the latest data to Analytics. Schedule the dataflow to be rerun every day to ensure that your app uses up-to-date data.

1. In Analytics Studio, click and select **Data Manager**.
2. Select **Dataflows & Recipes**.
3. Under **Dataflows**, look for your app and click .
4. Select **Schedule**, and set the mode, time, and day for updating data in your app. Set a time outside normal work hours so the dataflow doesn't interrupt business activities.
5. Click **Save**.

Understand Customer Lifecycle Analytics Limitations

Customer Lifecycle Analytics gives you access to most of the CRM Analytics capabilities, but with limitations.

Available for an extra charge in **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

Capability	Customer Lifecycle Analytics	Customer Lifecycle Analytics Base
Data sources	Salesforce and external data	Salesforce data
Object support	Standard and custom objects	Standard objects
Data volume	10 billion rows	10 million rows
Customize existing dashboards?	Yes	Yes
Create dashboards?	Yes	Yes
Customize existing datasets?	Yes	Yes
Create datasets?	Yes	Yes
Create custom CRM Analytics apps?	Yes	No
Supports Einstein Discovery and Experience Cloud integration?	Yes	No
Supports bulk actions and APEX steps?	Yes	No
Supports Sales Cloud Einstein AI features?	No	No
Supports Salesforce Inbox?	No	No
Einstein Prediction Builder	Yes	No
Einstein Discovery in Reports	Yes	No
CRM Analytics Platform	Yes	No
Fast Start Templates	Yes	No

SEE ALSO:

Customer Lifecycle Analytics Base App

Embed Customer Lifecycle Analytics Dashboards in Lightning Pages

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

Customer Lifecycle Analytics includes dashboards you can embed and access in Lightning Experience pages.

For general instructions, see Embed Dashboards in Lightning Pages in Salesforce Help. Here are examples using dashboards from the Customer Lifecycle Analytics app.

Example: To embed a contact object's feedback scorecard, use the following string in the Filter String box:

```
{"datasets":{"Contacts":[{"fields":["Id"],"filter":{"operator":"in","values":["$Id"]}}]}}
```

.

Example: To embed a contact object's customer lifecycle dashboard, use the following string in the Filter String box:

```
{"datasets":{"Contacts12":[{"fields":["Id"],"filter":{"operator":"in","values":["$Id"]}}]}}
```

Configure Feedback Scorecards

Configure feedback scorecards before you use them.

Configure Feedback Scorecards

Configure feedback scorecards before you use them.

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

Note: Before you configure feedback scorecards for an object, make sure that the object records are associated with survey invitations using SurveySubject.

1. Go to an existing Lightning Experience page, click , and then click **Edit Page**.
2. From the list of components, select **CRM Analytics Dashboard**.
3. From the Dashboard dropdown, select the scorecard you want to embed on the page.
4. Click **Filter String**.
5. In the text box, enter the filter string with survey name, question name, and other filters you want to add. Use the following syntax to enter the filter string:

```
{"datasets":{"<dataset name>":[{"fields":["<field>"],"filter":{"operator":"<operator
value>","values":["<context>"]}}], "<Dataset
name>":[{"fields":["<field>"],"filter":{"operator":"<operator value>","values":["<Survey
 Name>"]}},{"fields":["<field>"],"filter":{"operator":"<operator
value>","values":["<Question Name>"]}}]}}
```

6. Save your page.

Example: Here's an example filter string for configuring a Case feedback scorecard.

```
{"datasets":{"<Case
dataset>":[{"fields":["Id"],"filter":{"operator":"in","values":["$Id"]}}],
"<SurveyQuestionResponseWithDetails>":[{"fields":["SurveyVersion.Survey.Name"],"filter":{"operator":"in","values":["<Survey
 Name>"]}},{"fields":["Question.Name"],"filter":{"operator":"in","values":["<Question
 Name>"]}}]}}
```

SEE ALSO:

Generate Survey Invitations for Contacts, Person Accounts, and Leads

Send Survey Invitations Using Process Builder

Considerations for Sending Email Invitations to Gather Feedback on Support Cases

Gather Feedback at the End of a Customer Support Chat Session

Use Customer Lifecycle Analytics Dashboards

You can use Customer Lifecycle Analytics Dashboards to gain actionable insights into your customers and answer key questions about your business.

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

> Note: If the Customer Lifecycle Analytics app isn't available in your org, direct your administrator to Deploy Customer Lifecycle Analytics on page 82.

The Customer Lifecycle Analytics app includes two types of dashboards:

- Dashboards accessed through the app in CRM Analytics Studio.
- Embedded dashboards that deliver insights from within the context of Salesforce objects you work with.

They're designed to answer key questions about your business.

In-App Dashboards

You can access the in-app dashboards through the app in CRM Analytics Studio.

Embedded Dashboards

The Customer Lifecycle Analytics app includes dashboards and scorecards that you can embed in Lightning Experience pages. These dashboards provide detailed insights into your customer satisfaction and loyalty. Salesforce admins embed these dashboards in specific Salesforce pages.

In-App Dashboards

You can access the in-app dashboards through the app in CRM Analytics Studio.

EDITIONS

Available for an additional cost in: **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled

The Customer Lifecycle Home dashboard gives a quick insight into the key metrics based on survey responses.

Customer Satisfaction Lifecycle Map

Track customer satisfaction and the performance of your engagement channels based on the Customer Satisfaction Rating (CSAT) throughout the lifecycle. The dashboard's charts answer these questions:

- Overview page:
  - Which stage of the lifecycle needs attention?
  - How many participants responded to the surveys?
  - What's the distribution of participants?
  - What's the average CSAT score?
  - How actively involved are my customers?
  - What's the CSAT score for my engagement channels across customer lifecycle stages?
- Trends page:
  - How did the CSAT score trend over time?
  - How satisfied are my customers?
  - What's the change in CSAT Score for a selected period?
  - How did the CSAT score across stages trend over time?

- How engaged are my customers over time?
- What's the trend of my engagement-channel performance?

Customer Net Promoter Score Lifecycle Map

Gain insight into customer loyalty and monitor the performance of your engagement channels based on the Net Promoter Score (NPS) throughout the lifecycle. The dashboard's charts answer these questions:

- Overview page:
  - Which stage of the lifecycle needs attention?
  - How many participants responded to the surveys?
  - What's the distribution of participants?
  - What's the average NPS?
  - How actively involved are my customers?
  - What's the NPS of my engagement channels across customer lifecycle stages?
- Trends page:
  - How did the NPS trend over time?
  - How satisfied are my customers?
  - What's the change in NPS for a selected period?
  - How did the NPS across stages trend over time?
  - How engaged are my customers over time?
  - What's the trend of my engagement-channel performance across customer lifecycle stages?

Response Analysis

Gain insight into your customer experience based on their response to different questions. The dashboard shows a detailed analysis of response data for a survey, question type, or question. The dashboard's charts answer these questions:

- Which are the most and least selected answer choices?
- How did the answer choices trend over time?
- How did the rating or score change over time?
- What's the distribution of the survey responses?
- What's the comparison between survey responses?

Response Distribution

Get an overview of the response distribution across surveys and customer lifecycles. The dashboard's charts answer these questions:

- How many participants responded to the survey?
- How did the survey responses trend over time?
- How responsive and satisfied are my customers?
- What's the demographic distribution of the survey responses?
- Which are the least-rated questions in the survey?

Topic Analysis

Analyze trending topics and learn how different areas of your business are performing. Topics group survey data by common themes. When you filter data by a topic, all the survey data tagged with the topic appears on the dashboard. The dashboard's charts answer these questions:

- Which are the trending topics?
- What's the distribution of topics based on geography and demographics?

Cross-Tabulation Analysis

Identify the correlation between survey responses. The dashboard's charts answer these questions:

- What's the correlation between choice and rating responses?
- What's the distribution of choice and rating responses?
- What's the distribution of survey participants based on geography and demographics?

Sentiment Analysis Home

Get an overview of the overall sentiment of your customers and analyze the relevant metrics to focus on areas that need improvement. The dashboard's charts answer these questions:

- What's the overall sentiment for the company?
- What's the sentiment for each stage of the customer journey?
- What areas or topics have positive customer sentiment?
- Which areas are customer pain points and need improvement?
- How does the positive sentiment trend over time to see the effect of changes made?
- What's the sentiment for each location?
- Which are the areas to focus on?

Customer Net Promoter Score and Sentiment Lifecycle Map

Gain insight into customer loyalty and monitor the performance of engagement channels by analyzing the NPS and customer sentiment for each stage of the lifecycle. The dashboard's charts answer these questions:

- Overview page:
  - What's the NPS and sentiment across each journey map and stage?
  - What's the response rate of customers?
  - How do we compare and analyze the sentiment and NPS for different lifecycle stages?
  - How do we track the sentiment by channels and topics?
  - How does the sentiment vary across mediums?
  - Which stage of the lifecycle needs attention?
- Trend page:
  - How did the sentiment trend over time?
  - How satisfied are my customers based on the sentiment analysis?
  - What's the change in sentiment for a selected period?
  - How did the NPS and sentiment across stages trend over time?

- How engaged are my customers over time?
- What's the trend of my engagement-channel performance across customer lifecycle stages?

Embedded Dashboards

The Customer Lifecycle Analytics app includes dashboards and scorecards that you can embed in Lightning Experience pages. These dashboards provide detailed insights into your customer satisfaction and loyalty. Salesforce admins embed these dashboards in specific Salesforce pages.

Here's some general information about the dashboards and the questions they answer.

EDITIONS

Available for an additional cost in: **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled

Single Customer's Net Promoter Score Lifecycle

Analyze the customer lifecycle experience based on the Net Promoter Score (NPS) given by a customer. The dashboard's charts answer these questions:

- Which stage of the customer's lifecycle needs attention?
- What's the average score across the stages of the customer lifecycle?
- What's the latest NPS?

Single Customer's Customer Satisfaction Rating Lifecycle

Analyze the customer lifecycle experience based on the Customer Satisfaction Rating (CSAT) given by a customer. The dashboard's charts answer these questions:

- Which stage of the customer's lifecycle needs attention?
- What's the average rating across the stages of the customer lifecycle?
- What's the latest CSAT rating?

Customer NPS Lifecycle

Gain insight into your customer lifecycle experience based on the NPS scores given by multiple customers. The dashboard's charts answer these questions:

- Which stage of the customer's lifecycle can be improved?
- What's the NPS for the lifecycle?
- How many customers responded to the survey?
- What's the total customer base?
- How many responses did we get?
- What's the NPS across engagement channels and stages of the lifecycle?

Customer CSAT Lifecycle

Gain insight into your customer lifecycle experience based on the CSAT rating given by multiple customers. The dashboard's charts answer these questions:

- What's the average CSAT rating?
- How many responses did we get?
- Which stage of the customer's lifecycle can be improved?

- What's the CSAT rating across engagement channels and stages of the lifecycle?

Embedded Scorecards

Use the scorecards to get a quick view of how various key metrics perform.

Table 1: Embedded Scorecards

Scorecard	Description
Case Customer Satisfaction	The scorecard answers these questions: • What's the latest CSAT rating for the case? • What's the average of all the ratings?
Contact Customer Satisfaction	The scorecard answers these questions: • What's the latest CSAT rating of the contact? • What's the average of all the ratings?
Person Account Customer Satisfaction	The scorecard answers these questions: • What's the latest CSAT rating of the person account? • What's the average of all the ratings?
User Customer Satisfaction	The scorecard answers these questions: • What's the latest CSAT rating of the user? • What's the average of all the ratings?
Contact NPS	The scorecard answers these questions: • What's the latest NPS of the contact? • What's the overall NPS?
Person Account NPS	The scorecard answers these questions: • What's the latest NPS of the person account? • What's the overall NPS?
Account NPS	The scorecard answers these questions: • What's the latest NPS of the account? • What's the overall NPS?
User NPS	The scorecard answers these questions: • What's the latest NPS of the user? • What's the overall NPS?
Sentiment Analysis Card	The scorecard answers these questions:

Scorecard	Description
	• What's the customer's latest sentiment for the company? • What's the sentiment trend for the different engagement channels? • What are the topics that create negative sentiment?
Topic Sentiment Card	The scorecard answers these questions: • What's the sentiment trend for the different topics? • Which topic needs immediate attention?

Customer Lifecycle Analytics Base App

With the Salesforce Feedback Management Starter and Growth licenses, your Salesforce org is provisioned with five user licenses for the Customer Lifecycle Analytics Base App.

EDITIONS

Available for an extra charge in **Enterprise**, **Performance**, **Partner Developer**, **Developer**, and **Unlimited** editions where Salesforce Surveys is enabled.

Note: To use the Customer Lifecycle Analytics Base app, you must have either the CLAAnalytics Base Admin or CLAAnalytics Base User permission sets assigned.

The Customer Lifecycle Analytics Base App license provides you with access to Customer Lifecycle Analytics with these limitations:

- You can only use data from your Salesforce org as your data sources.
- The app supports only data from the standard Salesforce objects.
- You can analyze up to 10 million rows.
- The base app license doesn't provide your Salesforce org the permission to use Einstein Prediction Builder, Einstein Discovery in Reports, CRM Analytics Platform, and Fast Start Templates.
- Custom CRM Analytics apps can't be created.
- Einstein Discovery isn't available for the apps you create.

Note: Contact your Salesforce representative to subscribe to the Customer Lifecycle Analytics license if:

- You want to use the complete capabilities of Customer Lifecycle Analytics.
- Your org requires more than 5 licenses.

SEE ALSO:

Deploy and Use Customer Lifecycle Analytics
Create and Share an App from the Customer Lifecycle Analytics Template
Understand Customer Lifecycle Analytics Limitations

Surveys FAQs

Get answers to common questions about Salesforce Feedback Management.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

Can I print a survey from Salesforce Classic?

The Printable View option isn't supported for survey objects in the Salesforce Classic UI.

What browsers and devices does Salesforce Feedback Management support?

Salesforce Feedback Management is available on all supported browsers and devices for Lightning Experience.

What survey objects are supported in Salesforce Classic?

Only these survey objects are supported in the Salesforce Classic UI.

- Survey Subject
- Survey Email Branding
- Survey Engagement Context Param
- Survey Version Additional Information

How can participants pause a survey and finish it later without losing their progress?

When you create a survey, make sure that participants are required to authenticate before they can take the survey. Pausing surveys is supported only for surveys that require authentication.

Surveys Resources

Check out these resources to learn more about how to best use Salesforce Feedback Management.

EDITIONS

Available in: both Salesforce Classic (not available in all org) and Lightning Experience

Available by default in: **Enterprise**, **Unlimited**, and **Developer** Editions

Available with the Survey Response Pack, Feedback Management - Starter, and Feedback Management - Growth licenses

- **Trailhead Modules**
  - Survey Basics
  - Salesforce Surveys for Admins
  - Tableau CRM Customer Lifecycle Analytics
  - Design and Distribute Surveys with Salesforce Feedback Management
- **Learning Map**: Manage Customer Feedback Learning Map
- **Salesforce Surveys for Developers**
  - Send survey invitations using the Connect REST API
  - Send survey invitations using Apex
  - Translate surveys using REST APIs
  - Get to Know the Salesforce Surveys data model
  - Survey standard objects
    - Survey
    - Survey Email Branding
    - Survey Engagement Context
    - Survey Invitation
    - Survey Question
    - Survey Question Choice
    - Survey Question Response

- Survey Question Score
- Survey Response
- Survey Subject
- Survey Version
- Survey Version Addl Info

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