

salesforce

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# Enhance Customer Experience with Salesforce Surveys

Salesforce, Spring '20



 @salesforcedocs

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# CONTENTS

<a href="#">Salesforce Surveys</a> .....	1
Set Up Surveys .....	1
Create and Design Surveys .....	13
Translate Your Surveys .....	20
Distribute Surveys .....	21
Analyze Responses .....	28
Deploy and Use Customer Lifecycle Analytics .....	36
Resources .....	45
<a href="#">Index</a> .....	46



# SALESFORCE SURVEYS

Welcome to Salesforce Surveys! Create engaging, easy-to-use surveys with a simple editor to collect feedback and information from your users or customers.

You can select different types of questions to gather the data that suits your needs. After you add a question, specify the responses that participants can choose.

The survey data that you collect from participants is stored in your org. You can then use Salesforce to export survey data, create reports and dashboards, and share insights with your company.

## EDITIONS

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

### Set Up Surveys

Enable Surveys in your org, and then set up Surveys based on your requirements. You can give users inside and outside your org permission to create and share surveys, and to view survey records. Add related lists and Lightning components that help track surveys, invitations, and responses associated with other records in your org.

### Create and Design Surveys

Use a wide range of question types to keep your participants engaged. Create, copy, and manage surveys across versions. Change the look and feel of your surveys to fit your company's brand. Design surveys to personalize your participants' experience. Enable your participants to view the most relevant survey pages and questions based on their previous responses.

### Translate Your Surveys

Gather insight from your global audience by translating your surveys. You can translate surveys only in languages that you have permission for in the Translation Workbench.

### 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.

### Analyze Responses

Use the Analyze tab in the Survey Builder to view and export response data. Create custom reports based on Survey objects to analyze responses in detail.

### 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.

### Resources

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

## Set Up Surveys

Enable Surveys in your org, and then set up Surveys based on your requirements. You can give users inside and outside your org permission to create and share surveys, and to view survey records. Add related lists and Lightning components that help track surveys, invitations, and responses associated with other records in your org.

## EDITIONS

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

[What's Required to Enable Surveys for My Org?](#)

Know which profiles allow users to create and send surveys, and which Surveys objects they require permissions for.

[Enable Surveys](#)

Enable Surveys to let your users create surveys and send them to participants.

[Give Users Permission to Create and Send Surveys](#)

Assign users one of the four profiles that have the required permissions to create and send surveys.

[Enable Users with a Custom Profile Create and Send Surveys](#)

Update object permissions for users who are assigned a custom profile so they can create and send surveys.

[Give Guest Users Permission to Respond](#)

Assign guest users the object permissions that allow them to respond to surveys.

[Configure Sharing Settings for Surveys](#)

To let survey creators and participants access surveys and related records, configure sharing settings for surveys.

[Let Users View Invitations and Responses](#)

Enable users to view survey invitations and the responses associated with them. Users can also view the responses on the Analyze tab of the Survey Builder and in reports that are based on the SurveyQuestionScore object.

[Add the Survey Invitations and Responses Related List to Objects](#)

You can add the Survey Invitations and Responses related list to any object supported by SurveySubject. Use the related list to view which invitations and responses are associated with a record.

[Set Up Your Email Composer to Send Email Invitations and Export Responses](#)

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

[Lightning Components for Surveys](#)

Use Lightning components to increase your response rates, display scores provided by participants, translate surveys, and tag survey records.

[Send Survey Records from One Org to Another](#)

Use packages to send your survey records from one Salesforce org to another. For example, you can create a survey, test the survey in a sandbox org, and then send it to your production org.

## What's Required to Enable Surveys for My Org?

Know which profiles allow users to create and send surveys, and which Surveys objects they require permissions for.

Access Level	Details	Requirements
Create multiple surveys to send to other Salesforce users in your org.	<ul style="list-style-type: none"> <li>Survey creators can invite other people in their Salesforce org to take the survey.</li> <li>Survey participants must log in to their Salesforce accounts to take the survey.</li> </ul>	<p>For each user who needs to create and send surveys:</p> <ul style="list-style-type: none"> <li>Associate a profile that allows the user to create and send surveys on page 4.</li> <li>Configure sharing settings for survey objects.</li> </ul>

### EDITIONS

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

Access Level	Details	Requirements
<p>Create multiple surveys to send to participants in a Salesforce community.</p>	<p>Survey creators can invite anyone in their Salesforce org or anyone who has access to your Salesforce community to take the survey.</p>	<p>For each user who needs to create and send surveys:</p> <ul style="list-style-type: none"> <li>• <a href="#">Associate a profile that allows the user to create and send surveys</a> on page 4.</li> <li>• <a href="#">Configure sharing settings for survey objects</a>.</li> </ul> <p>To send surveys to participants in a community:</p> <ul style="list-style-type: none"> <li>• <a href="#">Create and enable a Salesforce community</a>.</li> <li>• <a href="#">Associate the community with Salesforce Surveys in setup</a>.</li> <li>• <a href="#">Give Guest Users Permission to Respond</a></li> <li>• Provide participants Read permission to the Contact object.</li> </ul> <p>If you want community users to authenticate before they access a survey:</p> <ul style="list-style-type: none"> <li>• <a href="#">Purchase Community Login licenses for your Salesforce community</a>.</li> </ul>
<p>Create multiple surveys to send to any participant.</p>	<p>Survey creators can invite any participant to take the survey. Participants don't have to be part of your org or community.</p>	<p>For each user who needs to create and send surveys:</p> <ul style="list-style-type: none"> <li>• <a href="#">Associate a profile that allows the user to create and send surveys</a> on page 4.</li> <li>• <a href="#">Configure sharing settings for survey objects</a>.</li> </ul> <p>To send surveys to participants:</p> <ul style="list-style-type: none"> <li>• <a href="#">Create and enable a Salesforce community</a>.</li> <li>• <a href="#">Enable public access to the community</a>.</li> <li>• <a href="#">Associate the community with Salesforce Surveys in setup</a>.</li> <li>• <a href="#">Give Guest Users Permission to Respond</a></li> <li>• Provide participants Read permission to the Contact object.</li> </ul>

## Enable Surveys

Enable Surveys to let your users create surveys and send them to participants.

1. In Setup, enter `survey` in the Quick Find box, select **Survey**, and then click **Survey Settings**.
2. Enable Surveys.  
When you enable Surveys, two sample surveys are added to your org.
3. To create surveys that are accessible to people who don't have Salesforce accounts in your company, select a community.
4. To allow survey owners to manage and export responses, enable Survey Owners Can Manage Responses.

SEE ALSO:

[Give Secure Access to Unauthenticated Users with the Guest User Profile](#)

## Give Users Permission to Create and Send Surveys

Assign users one of the four profiles that have the required permissions to create and send surveys.

- Standard user
- System administrator
- Contract manager
- Marketing user

The assigned profile must have the View Setup and Configuration permission enabled.

SEE ALSO:

[Profiles](#)

[Viewing a Profile's Assigned Users](#)

## Enable Users with a Custom Profile Create and Send Surveys

Update object permissions for users who are assigned a custom profile so they can create and send surveys.

Object	Permissions
Surveys	Read, Create, Edit, AND Delete
Survey Invitations	Read, Create, Edit, AND Delete
Survey Responses	Read, Create, Edit, AND Delete
Survey Subject	Read, Create, Edit, AND Delete

### EDITIONS

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

### USER PERMISSIONS

To enable Surveys:

- Customize Application


### EDITIONS

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

### EDITIONS

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





Object	Permissions
Assets	Read, Create, Edit, AND Delete
 <b>Note:</b> The permissions for the Assets object allows users to insert images in survey pages.	

SEE ALSO:

[Edit Object Permissions in Profiles](#)

## Give Guest Users Permission to Respond

Assign guest users the object permissions that allow them to respond to surveys.

1. From Setup, enter *Survey* in the Quick Find box, then select **Survey Settings**.
2. Check which community is selected as the default community to create public survey invitations.
3. Enter *Communities* in the Quick Find box, then select **All Communities**.
4. Open Experience Builder of the default community.
5.  From Experience Builder, click , and select **General**.
6. Click the profile name under *Guest User Profile*.
7. Click **Edit**.
8. In the Standard Object Permissions section, give guest users the following permissions:

Object	Permissions
Survey	Read
Survey Invitations	Read
Survey Responses	Read, Create, AND Edit

9. Click **Save**.

### EDITIONS

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

### USER PERMISSIONS

To give guest users permissions to respond to surveys:

- Customize Application

## Configure Sharing Settings for Surveys

To let survey creators and participants access surveys and related records, configure sharing settings for surveys.

1. In Setup, enter *Security* in the Quick Find box.
2. Click **Sharing Settings > Edit**.
3. Configure the sharing settings.

Settings	Default Internal Access	Description
Surveys	Private	Lets only participants who have a link to the survey access it.
Survey Invitations	Private	Lets participants who received a survey invitation access the survey.

4. Click **Save**.

## Let Users View Invitations and Responses

Enable users to view survey invitations and the responses associated with them. Users can also view the responses on the Analyze tab of the Survey Builder and in reports that are based on the SurveyQuestionScore object.

1. Switch to Salesforce Classic, and open the survey.
2. Click **Sharing > Add**.
3. Add the users you want to provide the permission to, and select **Read Only** as the access level.
4. Click **Save**.
5. Go back to the survey record.
6. In the Survey Invitations section, select the invitation.
7. Click **Sharing > Add**.
8. Add the users you want to provide the permission to, and select **Read/Write** as the access level.
9. Click **Save**.

### EDITIONS

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

### USER PERMISSIONS

To configure sharing settings:

- Customize Application

### EDITIONS

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


### USER PERMISSIONS


To provide users permission to view invitations and responses:


- Customize Application

## Add the Survey Invitations and Responses Related List to Objects


You can add the Survey Invitations and Responses related list to any object supported by SurveySubject. Use the related list to view which invitations and responses are associated with a record.

 **Note:** Before you can add the Survey Invitations and Responses related list to objects, you must enable Surveys in your org.

1. From Setup, in the Quick Find box, enter *Object Manager*, and select the object that you want to add the related list to.
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 .
6. In the Related List Properties dialog box, select the fields to display and the order in which the fields appear, and then click **OK**.

 **Important:** To populate the survey invitation fields and the survey response fields, associate both the SurveyInvitation object and the SurveyResponse object with the SurveySubject object.

7. Click **Save**.

 **Example:** If you use Support Settings or Case Auto-Response Rules to email survey invitations, the survey invitations are associated with the case records. You can view the survey invitations if you add the related list to Case object page layout. You also can use the list to track invitations that a process emails. The invitation is associated with the record that triggered the email.

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

### [View Invitations Associated with Contacts, Person Accounts, Leads, and Users](#)

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


SEE ALSO:

[SurveySubject](#)

## View Invitations Associated with Contacts, Person Accounts, Leads, and Users

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

If you don't see the list, check whether the related list has been added to Contact, Person Account, Lead, and User objects.

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

### EDITIONS

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

### USER PERMISSIONS


To add a related list:

- Customize Application

## Set Up Your Email Composer to Send Email Invitations and Export Responses

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

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

 **Note:** If you choose 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](#)

## Lightning Components for Surveys

Use Lightning components to increase your response rates, display scores provided by participants, translate surveys, and tag survey records.

[View Scores Provided by Participants \(Pilot\)](#)

Add the Customer Experience Score component so users can view participant's scores provided for object records. You can add this component to custom objects and the Account, Case, Contact, and User standard objects.

[Add a Survey to Any Record](#)

Use the Survey component to add a survey to object records that support Lightning Components. Once added to object records, users in your org can use this component to respond to the survey. This component can also be added to your community pages to gather responses from your guests.

[Translate Surveys Without the Languages Tab](#)

If the Language tab is disabled, your translators can use the Survey Translation component to translate surveys.

[Assign Topics to Survey Records](#)

Use the Topics component to attach themes to records of the Survey, Survey Question, Survey Question Choice, and Survey Question Response objects.

SEE ALSO:

[Lightning App Builder](#)

### EDITIONS

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

### EDITIONS

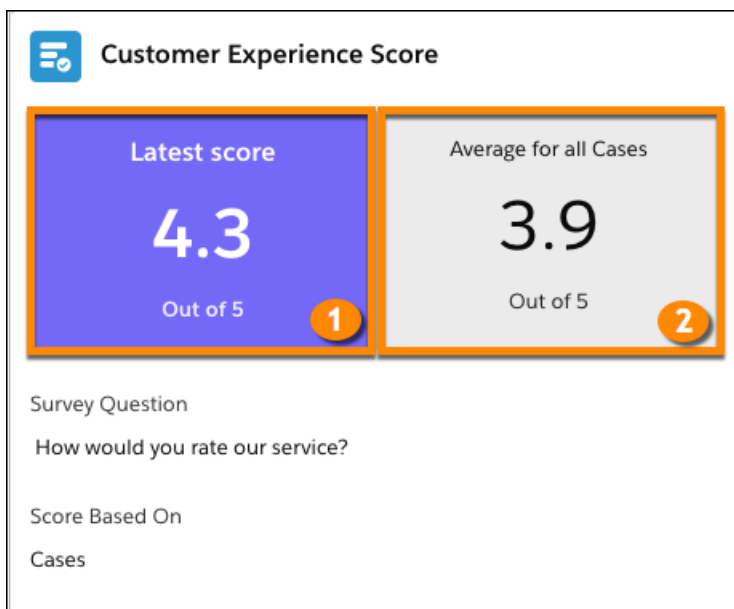
Available by default in:  
**Developer, Enterprise, Performance, and Unlimited** Editions.

## View Scores Provided by Participants (Pilot)

Add the Customer Experience Score component so users can view participant's scores provided for object records. You can add this component to custom objects and the Account, Case, Contact, and User standard objects.

**Note:** We provide Customer Experience Score component to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Customer Experience Score component isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

The scores are calculated based on a field that's related to the object as a related list or a lookup. Scores are retrieved from survey response records associated with the field. Scores for the following question types can be displayed: Net Promoter Score (NPS), score, slider, and rating.



The component shows two scores. The score on the right (2) is the average score received for all object records. The score on the left (1) is either the latest score or the average score for the record. Both scores are based on the field-level relationship you select. For example, in the screenshot, the average score (2) is for all cases associated with the account records. The latest score (1) is the latest response received for a case associated with the account (1).

1. Open a record of an object in which you want to add the Customer Experience Score component.
2. Click Setup, and select **Edit Page**.
3. Drag the Customer Experience Score component to where you want to the component to appear on the page.
4. In the Customer Experience Score panel, complete the following steps:
  - a. Name the component.
  - b. Select the survey that contains the question you want to display the score for.
  - c. Select the question you want to display the score for.

### EDITIONS

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


### USER PERMISSIONS

To add the Customer Experience Score component:


- Customize Application

 **Note:** Scores show only if the question is either part of an active survey version, or part of the latest version of an inactive survey.

- d. Select if you want to display the score of the latest response or the average score from all the responses.
- e. In the Record-Level Relationship, select one of the following:
  - Related Lists: If you want to display the score for a field that's associated with the object as a related list.
  - Lookups: If you want to display the score for a field that associated with the object as a lookup.
- f. In Field-Level Relationship, select the field that contains the score.

 **Note:** The scores are calculated based on this field.

5. Click **Save**, and then click **Activate**.

 **Example:** Your admin sets up Support Settings to ensure that a survey is sent to a case's contact when the case is closed. The invitation is for a single question survey, Customer Satisfaction Score. The survey contains the following question: How would you rate our service? Your admin wants to show the average score for all closed cases associated with an account. The admin drops the Customer Experience Score component on the Account object and selects the following values:


Field	Value
Survey	Customer Satisfaction Score
Question	How would you rate our service?
Display Metric	Average of All Responses
Object-Level Relationship	Related Object
Record-Level Relationship	Related Lists
Field-Level Relationship	Case.AccountId

#### [Share Customer Experience Score Component with Other Orgs \(Pilot\)](#)

You can create a package to share the Customer Experience Score component and its configuration with other orgs.

### Share Customer Experience Score Component with Other Orgs (Pilot)

You can create a package to share the Customer Experience Score component and its configuration with other orgs.

 **Note:** We provide Customer Experience Score component to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Customer Experience Score component isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

#### EDITIONS

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

To create the package, add all the objects where you configured the component. On installing the package, the survey used to configure the component is also added to the org.

SEE ALSO:

- [Send Survey Records from One Org to Another](#)
- [Create a Package](#)

## Add a Survey to Any Record

Use the Survey component to add a survey to object records that support Lightning Components. Once added to object records, users in your org can use this component to respond to the survey. This component can also be added to your community pages to gather responses from your guests.

1. Open a record of an object in which you want to add the Surveys component.
2. Click Setup, and select **Edit Page**.
3. Drag the Surveys component to where you want the component to appear on the page.
4. In the Surveys panel, select the survey you want to display.
5. Click **Save**, and then click **Activate**.

## Translate Surveys Without the Languages Tab

If the Language tab is disabled, your translators can use the Survey Translation component to translate surveys.

1. Open a survey record.
2. Click Setup, and select **Edit Page**.
3. Drag the Survey Translation component to where you want the component to appear on the page.
4. Click **Save**, and then click **Activate**.

SEE ALSO:

- [Translate Your Surveys](#)

### EDITIONS

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

### USER PERMISSIONS

To add the Surveys component:

- Customize Application

### EDITIONS

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

### USER PERMISSIONS

To add the Survey Translation component:

- Customize Application

## Assign Topics to Survey Records

Use the Topics component to attach themes to records of the Survey, Survey Question, Survey Question Choice, and Survey Question Response objects.

Enable Topics for the Survey objects before adding it to the record pages.

1. Switch to Salesforce Classic.
2. From Setup, enter *Topics for Objects* in the Quick Find box, and select **Topics for Objects**.
3. Select the Survey objects one at a time.
4. Select Enable Topics.
5. Click **Save**.

SEE ALSO:

[Organize Records with Tags and Topics](#)

[Configure Topics for Records in Lightning Experience](#)

## Send Survey Records from One Org to Another

Use packages to send your survey records from one Salesforce org to another. For example, you can create a survey, test the survey in a sandbox org, and then send it to your production org.

Consider the following before creating a package:

- If a survey has multiple versions, only the latest version is added to the package.
  - If a survey has multiple versions, including an active version, only the active version is added to the package.
1. In Setup, enter *Package Manager* in the Quick Find box, and select **Package Manager**.
  2. Click **New**.
  3. Define your package, and click **Save**.
  4. In the Components tab, click **Add**.
  5. For Component Type, select **Flow Definition**.
  6. Select the surveys you want to move to another org, and click **Add to Package**.

 **Note:** Branding sets and assets associated with the surveys are also added to the package.

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

Use the installation URL to install the package in one or more orgs.

SEE ALSO:

[Share Customer Experience Score Component with Other Orgs \(Pilot\)](#)

[Creating Managed Packages](#)

### EDITIONS

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

### USER PERMISSIONS

To enable Topics for Surveys objects:

- Customize Application

### EDITIONS

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

### USER PERMISSIONS

To enable managed packages:

- Customize Application

To create packages:

- Create AppExchange packages

To upload packages:

- Download AppExchange packages



## Create and Design Surveys

Use a wide range of question types to keep your participants engaged. Create, copy, and manage surveys across versions. Change the look and feel of your surveys to fit your company's brand. Design surveys to personalize your participants' experience. Enable your participants to view the most relevant survey pages and questions based on their previous responses.

### Survey Question Types

You can choose which types of questions to include in the survey.

#### Create a Survey

Create a survey to collect feedback and data from participants.

#### Customize Your Survey's Look and Feel

Customize a survey to reflect your company's brand and style using the Branding tab on the Survey Builder.

#### Enable Auto-Progress to the Next Survey Page

Participants can now automatically progress to the next survey page after answering the last question on a page.

#### Insert Images in Survey Pages

You can insert one or more images in questions, and on the Welcome and Thank You pages. The images must be less than 5 MB.

#### Insert Responses from Questions on Previous Pages

You can add responses from one or more questions on previous pages to a survey question.

#### Display Questions Based on Responses to Questions on the Same Page

Dynamically display questions based on the responses to other questions on the same page using display logic. Display logic can't be added to the first question on a page.

#### Decide Which Page Participants View Next


Use page branching logic to determine which page participants view next. You can enable participants to move directly to a page every time, or define conditions that decide which page participants view next. Page branching logic also enables users to submit the survey and directly move to the Thank You page. Add branching logic to the page from which you want the participants to move to another page.

### EDITIONS

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

## Survey Question Types

You can choose which types of questions to include in the survey.

Question Type	Description
Date	Participants select a date from a calendar.
Multiple Selection	Participants can select multiple answers from a list of choices.
Picklist	Participants select an answer from a predefined list of options.  <b>Note:</b> Picklist options are stored as strings in Salesforce.
Ranking	Participants can rank among two or more items.

### EDITIONS

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

Question Type	Description
Rating	Participants select a rating from a scale.
<a href="#">Net Promoter Score® (NPS®)</a>	Participants can score to express how willing they are to recommend a product or a service.
Score	Participants select a satisfaction score from a list of numbers.
Single Selection	Participants can select only one answer from a list of choices.
Slider	Participants select a value on a sliding scale.
Text	Participants enter a free-form text answer.

### [Survey Question Properties](#)

You can customize each question page in your survey.

### [How Is the Average Rank of Items Calculated in a Question?](#)

When you add ranking items to a ranking question, a weight is added to each rank. The weights are used to calculate the average rank of each ranking item. You can add your own weights. The average rank of an item is calculated based on the weight of a rank, and the number of responses in which the item has been provided the same rank.

SEE ALSO:

[Create a Survey](#)

## Survey Question Properties

You can customize each question page in your survey.

Property	Description
Required	Indicates that a response is required.
Description	Lets you add a description field to the page.

SEE ALSO:

[Create a Survey](#)

### EDITIONS

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

## How Is the Average Rank of Items Calculated in a Question?

When you add ranking items to a ranking question, a weight is added to each rank. The weights are used to calculate the average rank of each ranking item. You can add your own weights. The average rank of an item is calculated based on the weight of a rank, and the number of responses in which the item has been provided the same rank.

When you provide a custom weight for a rank, the highest rank must have the highest weight, and the lower ranks must have gradually lower weights. For example, if you have four rank items, the values can be as follows.

### EDITIONS

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

Rank	Weight
1	4
2	3
3	2
4	1

An item's average weight is calculated using the following formula.

- $w$  = weight of a rank
- $p$  = number of responses in which an item has been provided the same rank



Formula:  $w_1p_1 + w_2p_2 + w_3p_3 + w_4p_4 / \text{total number of responses}$


The item with the highest average weight has the highest average rank. The items with lower average weights have gradually lower ranks.

## Create a Survey

Create a survey to collect feedback and data from participants.

1. On the Surveys tab, click **New** to open the Survey Builder.
2. Enter a name for the survey.
3. Edit the survey's Welcome page.

 **Note:** The first page of a survey is the Welcome page, not a question page. If you want the survey to open on a question page, disable the Welcome page by clicking  .

4. To add a question page, click **Add Page** in the sidebar.
5. To add one or more questions to the page, click **Add Question**.
6. Optionally, click  to change the question's properties.
7. Edit the survey's Thank You page.
8. Do one of the following.
  - a. Optional: To continue working on the survey later, click **Save**.
  - b. Optional: To review how the survey looks, click **Preview**.
  - c. To activate the survey so that you can send it to participants, click **Activate**.

### [Copy a Survey](#)

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

### EDITIONS

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

### USER PERMISSIONS

To create a survey:

- [Profile that allows the user to create and send surveys](#)

### [Create a New Survey Version](#)

To duplicate a survey's question and logic, you can create a new version. The new survey version is associated to the original survey record in the database.



SEE ALSO:

[Survey Question Types](#)

[Survey Question Properties](#)



## Copy a Survey

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

1. On the Surveys tab, click  next to the survey you want to copy, and select **Open Latest Version**.
2. If prompted, click **Open**.
3. Click , and select **Make a Copy**.
4. Enter a name for your new survey.
5. Make changes to the survey.
6. Do one of the following.
  - To continue working on the survey later, click **Save**.
  - To review how the survey looks, click **Preview**.
  - To activate the survey so that you can send it to participants, click **Activate**.

## Create a New Survey Version

To duplicate a survey's question and logic, you can create a new version. The new survey version is associated to the original survey record in the database.

1. On the Surveys tab, click  next to the survey you want to copy, and select **Open Latest Version**.
2. If prompted, click **Open**.
3. Click , and select **Create New Version > Yes**.
4. Edit the survey.
5. Do one of the following.
  - To continue working on the survey later, click **Save**.
  - To review how the survey looks, click **Preview**.
  - To activate the survey so that you can send it to participants, click **Activate**.

 **Note:** You can't activate a survey version if the current active version is referenced by other objects or processes.

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

### EDITIONS

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

### USER PERMISSIONS

To copy a survey:

- [Profile that allows the user to create and send surveys](#)

### EDITIONS

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

### USER PERMISSIONS

To create a survey version:

- [Profile that allows the user to create and send surveys](#)

## Customize Your Survey's Look and Feel

Customize a survey to reflect your company's brand and style using the Branding tab on the Survey Builder.

Use the Branding tab on the Survey Builder to change the look and feel of your survey. Here's a quick overview of all the things that you can customize on your survey:

Survey Attributes	What can you change?
Background Image	Replace the default background image with an image that's less than 750 KB. Adjust the opacity and the blur of the image. Remove the image and replace it with a background color.
Content Card	Opacity.
Questions	Text color.
Answer Choices	Text color and button color of the answer choices for the following question types: multiple selection, picklist, ranking, rating, and single selection.
Start, Next, and Finish buttons	Text color and button color.
Previous button	Text color and button color.


### EDITIONS

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

## Enable Auto-Progress to the Next Survey Page

Participants can now automatically progress to the next survey page after answering the last question on a page.

To enable participants to auto-progress to the next page, turn on Auto-Progress on the Branding tab of the Survey Builder.


 **Note:** If the last question on a page is of the type Date, Multiple Selection, Ranking, or Slider, participants can't auto-progress to the next page. In that case, participants must click Next to move to the next page.

### EDITIONS

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

## Insert Images in Survey Pages

You can insert one or more images in questions, and on the Welcome and Thank You pages. The images must be less than 5 MB.

1. On the rich text editor of a question, of the Welcome page, or the Thank You page, click .
2. Select an image from the Asset library of your Salesforce org or click **Upload Image** to insert a new image.
  - To select an image from the Asset library, select the image and click **Add**.
  - To insert a new image, select the image from your system. The image is automatically inserted in the rich text editor.

The images that you insert from your system are also automatically added to your org's Asset library. These images can be viewed by unauthenticated guest users.


 **Warning:** If images are added to a survey in a sandbox, the images must be inserted again in production.

SEE ALSO:

[View and Edit Asset Files](#)


## Insert Responses from Questions on Previous Pages


You can add responses from one or more questions on previous pages to a survey question.

 **Note:** You can't insert responses to questions of the type Ranking. Also, responses can't be added to the Thank You page.

1. On a survey page, enter the question to which you want to add a response.
2. Place the cursor where you want to insert a response, and click **Insert Response**.
3. On the Insert response modal, select a question that you want to insert a response for, and click **Insert**.

The question is inserted as a merge field. When participants view the merge field, it resolves to the response.

 **Warning:** If the user edits the merge field by mistake and removes a word or character, the merge field becomes invalid. Broken merge fields appear as text to the participants.

 **Example:** There is a survey with two pages, each page with one question on each page. The first one is: How would you rate our service? In the second question, the survey creator wants to know why a particular rating was provided. The second question is: Tell us a bit more about why you rated us. The survey creator places the cursor at the end of the second sentence and inserts the first question. The second question now reads: Tell us a bit more about why you rated us {1.1 How would you rate our service?}. When the participant views it, here's how the question looks when the participant responded with 5 in the previous question: Tell us a bit more about why you rated us 5.

### EDITIONS

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

### USER PERMISSIONS

To insert images in survey pages

- [Profile that allows the user to create and send surveys](#)

### EDITIONS

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


### USER PERMISSIONS


To insert a response:

- [Profile that allows the user to create and send surveys](#)

## Display Questions Based on Responses to Questions on the Same Page

Dynamically display questions based on the responses to other questions on the same page using display logic. Display logic can't be added to the first question on a page.

1. On a survey question page, click **Display Logic** on the question you want to dynamically display based on previous responses.
2. On the Question display logic modal, select if the question must be displayed based on any one or all the conditions you define.
3. To define a condition, complete the following steps:
  - Select the question that defines the condition.
    -  **Note:** Conditions can't be defined based on questions of the type Ranking.
  - Select the operator for the condition.
  - Select or add the response value based on which question is displayed.
4. To define another condition, click **Add Condition**.
5. After you defined all the conditions, click **Save Logic**.  
The logic is saved. To ensure that the survey uses your logic, save the survey.

 **Example:** A page has two questions. The first question is of the type NPS: How likely are you to recommend our service to a friend or colleague? The second question is: Let us know how we can improve. On the second question, a display logic is added to show the question only when the participant responds with 6 or less on the first question.

### EDITIONS

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


### USER PERMISSIONS


To add display logic to a question:

- [Profile that allows the user to create and send surveys](#)

## Decide Which Page Participants View Next

Use page branching logic to determine which page participants view next. You can enable participants to move directly to a page every time, or define conditions that decide which page participants view next. Page branching logic also enables users to submit the survey and directly move to the Thank You page. Add branching logic to the page from which you want the participants to move to another page.

1. On the survey page you want to add branching rules to, click .
2. On the Page branching logic modal, choose if you want participants to move to a particular page every time or based on conditions.
  - If you want participants to move to a particular page every time, select **Every time**, and select the page the participants view next.
  - If you want to define rules that decide which page participants view next, select **Based on conditions**, and complete the following steps:
    - a. Select the page which the participants must view next based on the conditions you define.
    - b. Select if participants must view the page based on any one or all the conditions you define.
    - c. Select the question based on which condition is defined.

 **Note:** Conditions can't be defined based on questions of the type ranking.

### EDITIONS

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

### USER PERMISSIONS

To add branching logic to a page:


- [Profile that allows the user to create and send surveys](#)

- d. Select the operator for the condition.
- e. Select or add the response value based on which the condition is displayed.
- f. To define another conditions, click **Add Condition**.
- g. To save all your conditions, click **Create Rule**.

A rule is a collection of conditions. A rule decides which page the participants views next. You can define multiple rules, each of which can decide which page participants view next.

### 3. Click **Save Logic**.

The logic is saved. To ensure that the survey uses your logic, save the survey.

 **Example:** A survey has three pages. The first page contains a question of the type NPS: How likely are you to recommend our service to a friend or colleague? The second and third pages contain text-type questions. The question on the second page is: Let us know what you didn't like. The question on this third page is: Let us know how we can improve. Branching logic is added to the first and second pages. The first page has three rules. The first rule is that if the participant's response is 9 or more, automatically submit the survey and move directly to the Thank You page. The second rule is that if the participant's response is from 7 through 8, move to the third page. The third rule is that if the participant's response is 6 or less, move to the second page. The logic on the second page allows the participants to directly move to the Thank You page every time.

## Translate Your Surveys

Gather insight from your global audience by translating your surveys. You can translate surveys only in languages that you have permission for in the Translation Workbench.


 **Note:** You can't insert images in translated survey pages.

1. Open the survey that you want to translate.
2. Navigate to the Languages tab.


You can only view languages that are active in the Translation Workbench.

 **Tip:** Translators in your org can translate surveys only in languages that they have permissions for.

3. Next to the language, click **Translate**.

 **Note:** Translate only the text provided by the survey creator. We take care of the rest in the languages fully supported by Salesforce.

4. When you're done translating, click **Save & Finish**.

 **Note:** When you translate a question that includes a response, a merge field shows the developer name of the inserted question. Paste the merge field in your translation. When your global participants view the question, the merge field resolves to the response.

### EDITIONS

Available in: Lightning Experience

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

### USER PERMISSIONS

To translate surveys:

- Permissions for languages in [Translation Workbench](#)
- Read permission for the survey



### [How Do Participants View Translated Surveys?](#)

Participants from both within your org and outside can participate in a translated survey.

#### SEE ALSO:

[Translate Surveys Without the Languages Tab](#)

[Supported Languages](#)


[Surveys Translation REST API Resources](#)

## How Do Participants View Translated Surveys?

Participants from both within your org and outside can participate in a translated survey.

When a participant from within your org opens a survey invitation, the survey opens in the default language set by the participant. If a survey is not 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 the survey is translated, including the language that the survey was created in.

 **Tip:** To view a survey in the language it was created in, a participant must select language as the Default Language.

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

#### EDITIONS

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

## 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.

To send a survey to community members, you must belong to that community.

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

- Communities are enabled in your org.
- Public access is enabled for the community.
- On the Survey Settings page, the community is selected as the default for generating public survey invitations.

### [Survey Invitation Settings](#)

Use the survey invitation settings to control your surveys' security.

### [Generate Survey Invitation Links](#)

Generate a survey invitation link and send it to your participants.

### [Send Survey Invitations by Email](#)

You can send an email invitation for a survey to leads, contact, and members of your org. Invitations include a link to launch the survey, or a link to a particular survey question. You can send an email invitation for questions of the following types: Net Promoter Score (NPS), rating, and score.

### [Generate Individual Survey Invitations for Contacts, Person Accounts, and Leads](#)

Generate individualized survey invitations for contacts, person accounts, and leads directly from their records.

#### EDITIONS

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

### [Send Survey Invitations Using the Process Builder](#)

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

### [Send Surveys to Gather Feedback on Support Cases](#)

Gather feedback on a case by automating the process of emailing an invitation when a case is closed or when case response rules are met.

### [Send Surveys During a Marketing Campaign](#)


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

### [Personalize Survey Questions](#)

You can personalize your surveys by using merge fields in the questions and the survey invitation link.


## Survey Invitation Settings

Use the survey invitation settings to control your surveys' security.

Setting	Available for:	Description
Anonymize responses	<ul style="list-style-type: none"> <li>Participants in your company</li> <li>Participants outside your company</li> </ul>	Participants can take the survey without revealing their name or other identifying information.
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	Lets a participant who receives a link take the survey without logging into Salesforce or a community.
Unique link  <b>Note:</b> Use only when you send an email invitation.	<ul style="list-style-type: none"> <li>Participants in your company</li> <li>Participants outside your company</li> </ul>	Each participant receives a unique invitation link. The participant's name is associated with the participant's response record.

### EDITIONS

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

 **Note:** Provide Read permission on the Contact object to participants who access a survey from within a community.

### [Set Expiration Dates for Your Survey Invitations](#)

You can add, change, or remove an expiration date for an invitation at any point during its life cycle.

## Set Expiration Dates for Your Survey Invitations

You can add, change, or remove an expiration date for an invitation at any point during its life cycle.

You can set the expiration date for a survey invitation:

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

A survey invitation with an expiration date always expires at 23:59:59 UTC (Coordinated Universal Time) of the expiration date.

### EDITIONS

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

## Generate Survey Invitation Links

Generate a survey invitation link and send it to your participants.

1. In the Survey Builder, select **Send > Get Link**.
2. Select whether you want to send your survey to participants within your company or outside your company.
3. [Select the settings for your survey invitation](#).
4. Copy the survey link, and send it to your participants.

### EDITIONS

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

### USER PERMISSIONS

To generate an invitation link:

- [Profile that allows the user to create and send surveys](#)

## Send Survey Invitations by Email

You can send an email invitation for a survey to leads, contact, and members of your org. Invitations include a link to launch the survey, or a link to a particular survey question. You can send an email invitation for questions of the following types: Net Promoter Score (NPS), rating, and score.

1. In the Survey Builder, select **Send > Send Email**.
2. Select a question or the survey link, and click **Next**.
3. Compose the email. You can include up to 50 recipients.

For the From field, you can also choose to add an organization-wide email address.

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

4. Click **Next**.
5. [Select the settings for your survey invitation](#) on page 22, and click **Send**.

### EDITIONS

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

### USER PERMISSIONS

To send an email invitation:

- [Profile that allows the user to create and send surveys](#)
- Send Email

### [Personalize Survey Invitation Emails with Templates](#)

Use the predefined email templates to populate the survey invitation link or the merge fields containing the survey question in the survey invitation email. You can modify the predefined templates or create your own.

SEE ALSO:

[Organization-Wide Email Addresses](#)

## Personalize Survey Invitation Emails with Templates

Use the predefined email templates to populate the survey invitation link or the merge fields containing the survey question in the survey invitation email. You can modify the predefined templates or create your own.


When using or copying the predefined templates, don't edit or remove the included hyperlink or merge field. When creating your own template, copy the hyperlink or the merge field to the new template. You can add up to 4000 characters in the body of the email templates.

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

### EDITIONS

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

Template	Use
Embed_a_Survey_Link	Populates the invitation link to the survey using the (href): SURVEY_INVITATION_URL hyperlink.
Embed_a_Survey_Question	Populates: <ul style="list-style-type: none"> <li>The question using the {{{SurveyQuestion.QuestionName}}} merge field.</li> <li>The question scale using the {{{SurveyQuestion.QuestionHtmlContent}}} merge field.</li> </ul>

 **Note:** If you edit or delete a predefined template, you can recreate it by [disabling Surveys, and enabling it again in Setup](#).

### [Send an Email Invitation Without Using a Template](#)

You can send an email invitation without using an email template. When composing the email body, add the required merge fields to either send a link to a survey question or to launch the survey.

SEE ALSO:

[Email Templates in Lightning Experience](#)

[Add Images to Email Templates in Salesforce Classic](#)

## Send an Email Invitation Without Using a Template

You can send an email invitation without using an email template. When composing the email body, add the required merge fields to either send a link to a survey question or to launch the survey.

Purpose	Add
Link to a question	Add the merge fields in one of the following ways: <ul style="list-style-type: none"> <li>• Insert the merge fields <b>Question Name</b> and <b>Question Html Content</b></li> <li>• Type the merge fields  <code>{{{SurveyQuestion.QuestionName}}}</code> and  <code>{{{SurveyQuestion.QuestionHtmlContent}}}</code></li> </ul>
Launch a survey	Add the hyperlink <code>SURVEY_INVITATION_URL</code>

## Generate Individual Survey Invitations for Contacts, Person Accounts, and Leads

Generate individualized survey invitations for contacts, person accounts, and leads directly from their records.

When you generate a survey invitation, you can choose to associate a record with it. This creates a separate SurveySubject record which you can't view. For example, if you are generating an invitation for a survey that is related to a particular case, you can associate the case record to the survey invitation.

1. Open the contact, person account, or lead record to whom you want to send a survey.
2. Click **Get Survey Invitation**.
3. In the Get Survey Invitation window, search for the survey and the related record.
4. Click **Generate Invitation**.
5. Copy the survey invitation link.

Mail the survey invitation link to the contact, person account, or lead from the record by using the Email option on the Activity tab.

### EDITIONS

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

### USER PERMISSIONS

To generate survey invitations:

- [Profile that allows the user to create and send surveys](#)
- Part of the community associated with the survey

To associate a record with a survey invitation:

- Read, Create, Edit, and Delete permissions on SurveySubject records


## Send Survey Invitations Using the Process Builder

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

The survey invitation record is associated with the new or changed record that started the process. For more information on how to configure the Send Survey Invitation action type, see [Send a Survey Invitation from a Process](#).

### EDITIONS

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

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

## Send Surveys to Gather Feedback on Support Cases

Gather feedback on a case by automating the process of emailing an invitation when a case is closed or when case response rules are met.

For more information, see [Set Up a Customer Feedback Survey](#).

### [Considerations for Invitations Sent for Cases](#)

Review these considerations before you send survey invitations for cases.

## Considerations for Invitations Sent for Cases

Review these considerations before you send survey invitations for cases.

- Ensure that a default community is selected for public survey invitations.
- Considerations for the invitation settings:
  - You can generate invitations only for cases with an associated contact.
  - The contact associated with the case receives the invitation.
  - Each invitation is unique. When a contact responds, the contact's name is associated with the participant's response record.
  - Invitations expire in 90 days.
  - Each invitation has the following records:
    - Case record
    - Case owner record
- Selections align with your survey questions:
  - The survey link is sent if the survey doesn't contain a question of the following types: Net Promoter Score (NPS), rating, and score.
  - If the survey contains a question of the following types, that question is sent: NPS, rating, and score.
  - If the survey contains more than one question of the following types, any one of the questions is sent: NPS, rating, and score.

### EDITIONS

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

### EDITIONS

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

## Send Surveys During a Marketing Campaign

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

1. In Journey Builder, click **New Journey**, and select either **Create Journey From Scratch** or **Create Journey From Template**.
2. Drag **Object Activity** onto the canvas, and click it.
3. Select the **Survey Invitation** object, and click **Next**.
4. Click **Create New**, and click **Next**.
5. In Map Fields, define the fields, and click **Next**.

Field	Value
Can Respond Anonymously	Select if you don't want to store the participant's name.
Can See Their Response	Select if you want to allow the participants' to view their responses after they submit them.
Let Guest Respond	Select if your participants aren't members of your org.
Name	Name of the survey that you want to send invitations for.
Survey ID	Unique identifier of the survey you want to send invitations for.
Invitation Expires On	Select if you want the invitation to expire on a particular date.
Is Default	Select if you want this invitation to be the default invitation that's sent for the survey.
Network ID	Unique identifier of the community associated with the survey.
Owner ID	Unique identifier of the user creating the invitation.
Participant ID	Unique identifier of the field that you want to send invitations to.
Survey Email Branding ID	Unique identifier of the configuration settings for the invitation.

6. Review your settings, name the activity, and click **Done**.

SEE ALSO:

[Object Activity in Journey Builder](#)

### EDITIONS

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

### USER PERMISSIONS

To generate survey invitations:

- [Profile that allows the user to create and send surveys](#)
- Part of the community associated with the survey

To create and publish journeys:

- General Access, View
- Automation Create, Edit

## Personalize Survey Questions

You can personalize your surveys by using merge fields in the questions and the survey invitation link.

Let's use an example where a two-question survey is personalized and sent to two customers, Sita Nagappan-Alvarez and Jose Figueroa, whose cases were resolved by different service agents.

1. Open the survey in the Survey Builder.
2. Personalize the survey by adding merge fields in the questions. Prefix each merge field with an exclamation mark (!).

Question	Question with Merge Field
Your case was recently resolved. Are you satisfied with the resolution?	Your case # {!CaseNumber} was recently resolved. Are you satisfied with the resolution?
Your case was resolved by our service agent. Did the agent answer all your questions?	Your case was resolved by {!CaseOwnerName}. Did the service agent answer all your questions?

3. Generate the survey invitation link.

In this example, the invitation link generated is

<https://samplesurveyinvitation.com/invitationID=testinvitation&surveyname=caseresolved>.

4. For each customer, add the merge field values unique to their case.

Customer Name	Merge Field Values	Invitation Link After Adding Merge Fields Values
Sita Nagappan-Alvarez	<ul style="list-style-type: none"> <li>• Case number: 12345</li> <li>• Case owner name: Adria Darby</li> </ul>	<a href="https://samplesurveyinvitation.com/invitationID=testinvitation&amp;surveyname=caseresolved&amp;CaseNumber=12345&amp;CaseOwnerName=AdriaDarby">https://samplesurveyinvitation.com/invitationID=testinvitation&amp;surveyname=caseresolved&amp;CaseNumber=12345&amp;CaseOwnerName=AdriaDarby</a>
Jose Figueroa	<ul style="list-style-type: none"> <li>• Case number: 54321</li> <li>• Case owner name: Leung Chan</li> </ul>	<a href="https://samplesurveyinvitation.com/invitationID=testinvitation&amp;surveyname=caseresolved&amp;CaseNumber=54321&amp;CaseOwnerName=LeungChan">https://samplesurveyinvitation.com/invitationID=testinvitation&amp;surveyname=caseresolved&amp;CaseNumber=54321&amp;CaseOwnerName=LeungChan</a>

5. Send the unique survey invitation link to each customer.

## Analyze Responses

Use the Analyze tab in the Survey Builder to view and export response data. Create custom reports based on Survey objects to analyze responses in detail.

### [View Response Data](#)

When participants complete a survey, you can view the response data on the Analyze tab of the Survey Builder. Each question type uses a different type of chart. The response charts are distributed by survey page for easy viewing.

### EDITIONS

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

### USER PERMISSIONS

To personalize a survey:

- [Profile that allows the user to create and send surveys](#)

### EDITIONS

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



### [Export Responses](#)

Export responses for a survey version from the Analyze tab of the Survey Builder. Survey invitation owners can export responses associated with their invitations. If you want survey owners to export responses, enable Survey Owners Can Manage Responses on the Survey Settings page.

### [Create a Custom Report Type to View Survey Data](#)

You can create a custom report type for survey responses. You can use custom report types to explore your survey responses, create dashboards, and share insights with your team.

## View Response Data

When participants complete a survey, you can view the response data on the Analyze tab of the Survey Builder. Each question type uses a different type of chart. The response charts are distributed by survey page for easy viewing.

If you don't see the information that you want on the Analyze tab, create a custom report type for survey responses.

SEE ALSO:

[Create a Custom Report Type to View Survey Data](#)

## Export Responses

Export responses for a survey version from the Analyze tab of the Survey Builder. Survey invitation owners can export responses associated with their invitations. If you want survey owners to export responses, enable Survey Owners Can Manage Responses on the Survey Settings page.

1. Navigate to the Analyze tab of the Survey Builder.
2. Select the version you want to export responses for.
3. Click **Export Responses**.
4. On the Export responses dialog box, choose your filter criteria and click **Send Email**.



**Note:** If you want to export responses associated to a particular object, select the object from the Associated Object dropdown.

5. Download the response file from the email you receive.



**Note:** The response file is also available in Owned by Me section of Files in your org. You can share, delete, or download the file from there.

SEE ALSO:

[Salesforce Files](#)

### EDITIONS

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

### EDITIONS

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

### USER PERMISSIONS

To export responses:

- [Profile that allows the user to create and send surveys](#)

## Create a Custom Report Type to View Survey Data

You can create a custom report type for survey responses. You can use custom report types to explore your survey responses, create dashboards, and share insights with your team.

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 the primary object, select a Salesforce Surveys object, and define the settings for your custom report type.
5. Click **Next**.
6. Select the related objects.
7. Click **Save**.

### [Know Which Survey Objects to Use for Different Reports Types](#)

You can use Survey objects to create different types of reports depending on your use case. Each object helps generate reports for one or multiple use cases.

### [Create a Custom Report Type to View Responses](#)

You can create a custom report type using the Survey Question Score object to analyze the responses for every question type apart from text. You can then view the responses in custom reports and dashboards at the survey-invitation level or survey-version level.

#### SEE ALSO:

[Build a Report in Lightning Experience](#)

[View Response Data](#)

## Know Which Survey Objects to Use for Different Reports Types

You can use Survey objects to create different types of reports depending on your use case. Each object helps generate reports for one or multiple use cases.

Objects	Use Case
SurveyQuestionResponses	View the responses provided by participants in one or more versions of a survey. Use the Created By: Full Name field to see the name of the participant who responded.
SurveyQuestionScores	View individual and overall scores provided by participants for one or more questions.
SurveySubjects	View invitations and responses associated with other objects.
SurveyVersions	View the different versions of a survey and the responses associated with each version.

#### EDITIONS

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

#### USER PERMISSIONS

To create a custom report type:

- Manage Custom Report Types

#### EDITIONS

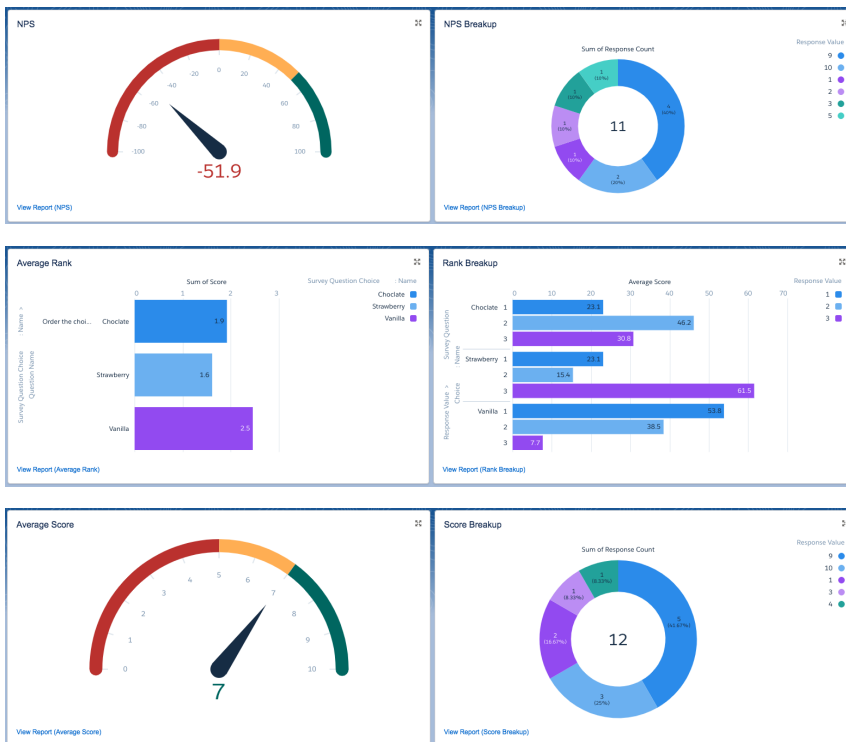
Available by default in: **Developer, Enterprise, Performance, and Unlimited** Editions.

## Create a Custom Report Type to View Responses

You can create a custom report type using the Survey Question Score object to analyze the responses for every question type apart from text. You can then view the responses in custom reports and dashboards at the survey-invitation level or survey-version level.

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 the primary object, select **Survey Question Scores**, and define the settings for your custom report type.
5. Click **Next**.
6. Click **Save**.

 **Example:** Here are some of the types of dashboards that you can create for NPS®, ranking, and scoring question types.



### Use Custom Reports to Analyze Responses

Create a report using a report type with Survey Question Score as its primary object. Use it to view responses for every question type apart from text. The report can track responses at the invitation-level or the survey version-level.

#### EDITIONS

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

#### USER PERMISSIONS

To create a custom report type:

- Manage Custom Report Types

## Use Custom Reports to Analyze Responses

Create a report using a report type with Survey Question Score as its primary object. Use it to view responses for every question type apart from text. The report can track responses at the invitation-level or the survey version-level.

The question type determines the column interpretation. Question types can be categorized as follows:

- Score: Net Promoter Score (NPS), rating, score, and slider
- Answer choice: Multi choice, picklist, and radio
- Ranking
- Date

 **Note:** The sample reports represent responses from two participants.

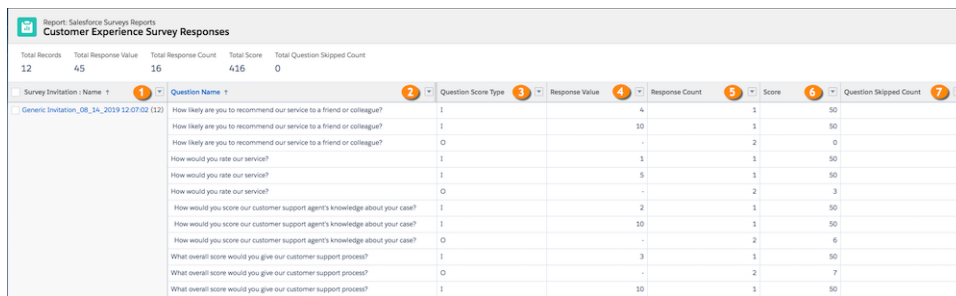
### EDITIONS

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

## Score


Here's an invitation-level report with questions of the types: NPS, rating, score, and slider.

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



Survey Invitation   Name	Question Name	Question Score Type	Response Value	Response Count	Score	Question Skipped Count
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?	O	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)	Name of the invitation for which response is recorded
Question Name (2)	Name of the question for which response is recorded
Question Score Type (3)	<ul style="list-style-type: none"> <li>• I – The individual scores that one or more participants select for a question</li> <li>• O – The aggregate for a question</li> </ul>

 **Note:** The field contains either I (individual) or O (overall), and they mean different things.

Field Name	Description
Response Value (4)	I – Score one or more participants select for a question
Response Count (5)	<ul style="list-style-type: none"> <li>I – Number of participants who select the same score</li> <li>O – Number of participants who respond to a question</li> </ul>
Score (6)	<p>For rating, score, and slider question types:</p> <ul style="list-style-type: none"> <li>I – Percentage of participants who select the same score for a question.</li> <li>O – Average of all responses.</li> </ul> <p>For NPS question type:</p> <ul style="list-style-type: none"> <li>I – Percentage of participants who select the same answer for a question.</li> <li>O – Percentage of participants who select 9 or 10 minus the percentage of participants who select less than 7.</li> </ul>
Question Skipped Count (7)	O – Number of participants who skip a question



## Answer Choice

Here's an invitation-level report with questions of the types: multi choice, picklist, and radio.

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

Survey Invitation Name	Question Name	Question Score Type	Survey Question Choice Name	Response Count	Score	Question Skipped Count
Generis Invitation_08_18_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

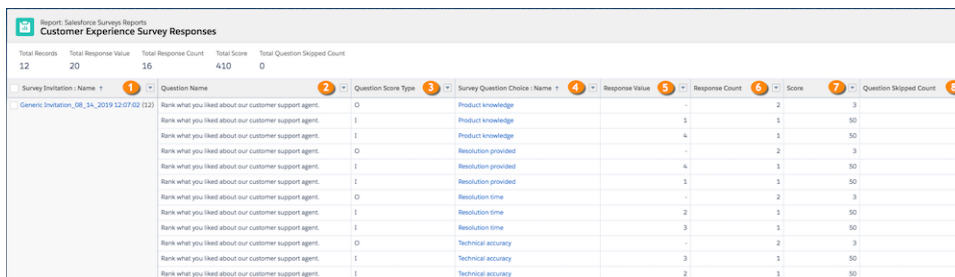
Field Name	Description
Survey Invitation: Name (1)	Name of the invitation for which response is recorded
Question Name (2)	Name of the question for which response is recorded

Field Name	Description
Question Score Type (3)  <b>Note:</b> The field contains either I (individual) or O (overall), and they mean different things.	<ul style="list-style-type: none"> <li>I – Each answer choice one or more participants select for a question</li> <li>O – The number of participants who respond to a question</li> </ul>
Survey Question Choice: Name (4)	I – Answer choice one or more participants select for a question  <b>Note:</b> In this report, the multi choice question has three I rows because one participant selects two answer choices.
Response Count (5)	<ul style="list-style-type: none"> <li>I – Number of participants who select the same answer choice</li> <li>O – Number of participants who respond</li> </ul>
Score (6)	<ul style="list-style-type: none"> <li>I – Percentage of participants who select the same answer choice for a question</li> <li>O – Number of participants who respond to a question</li> </ul>
Question Skipped Count (7)	O – Number of participants who skip a question

## Ranking

This invitation-level report contains a ranking type question.

Question Name	Answer Choices
Rank what you liked about our customer support agent.	<ul style="list-style-type: none"> <li>Product knowledge</li> <li>Resolution provided</li> <li>Technical accuracy</li> <li>Resolution time</li> </ul>




The screenshot shows a report titled "Customer Experience Survey Responses" with the following summary statistics:

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

The report table below shows the data for the ranking question "Rank what you liked about our customer support agent.":

Survey Invitation Name	Question Name	Question Score Type	Survey Question Choice Name	Response Value	Response Count	Score	Question Skipped Count
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	-	3	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	-

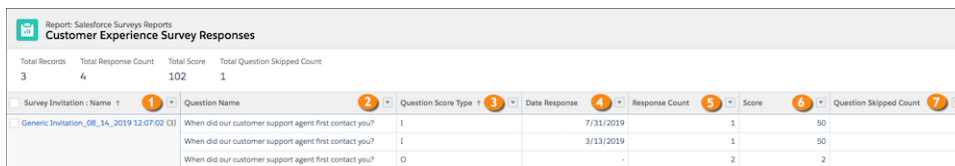
Field Name	Description
Survey Invitation: Name (1)	Name of the invitation for which response is recorded

Field Name	Description
Question Name (2)	Name of the question for which response is recorded
Question Score Type (3)  <b>Note:</b> The field contains either I (individual) or O (overall), and they mean different things.	<ul style="list-style-type: none"> <li>I – The rank that one or more participants select for each ranking item</li> <li>O – The number of participants who respond to the question</li> </ul>
Survey Question Choice: Name (4)	I – Ranking item of a question
Response Value (5)	I – Rank that one or more participants select for a ranking item
Response Count (6)	<ul style="list-style-type: none"> <li>I – Number of participants who select the same rank for a ranking item</li> <li>O – Number of participants who respond to a question</li> </ul>
Score (7)	<ul style="list-style-type: none"> <li>I – Percentage of participants who select the same rank for a ranking item</li> <li>O – Average of the weights participants provide for a ranking item</li> </ul>
Question Skipped Count (8)	O – Number of participants who skip a question

## Date


This invitation-level report contains a date type question.

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



Survey Invitation Name	Question Name	Question Score Type	Date Response	Response Count	Score	Question Skipped Count
Generic Invitation_08_14_2019 12:07:02 (3)	When did our customer support agent first contact you?	I	7/31/2019	1	50	-
	When did our customer support agent first contact you?	I	3/13/2019	1	50	-
	When did our customer support agent first contact you?	O	-	2	2	1

Field Name	Description
Survey Invitation: Name (1)	Name of the invitation for which response is recorded
Question Name (2)	Name of the question for which response is recorded

Field Name	Description
Question Score Type (3)  <b>Note:</b> The field contains either I (individual) or O (overall), and they mean different things.	<ul style="list-style-type: none"> <li>I – Each date that one or more participants select in a question</li> <li>O – The number of participants who respond to the question</li> </ul>
Date Response (4)	I – Date selected in a question
Response Count (5)	<ul style="list-style-type: none"> <li>I – Number of participants who select the same date for a question</li> <li>O – Number of participants who respond to a question</li> </ul>
Score (7)	<ul style="list-style-type: none"> <li>I – Percentage of participants who select the same date for a question</li> <li>O – Number of participants who respond to a question</li> </ul>
Question Skipped Count (8)	O – Number of participants who skip a question

## 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.

### [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.

#### EDITIONS

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

## 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.

 **Tip:** Follow the steps in the order shown to deploy Customer Lifecycle Analytics. If you haven't used Einstein Analytics before, learn about it from [Analytics Help](#).

### 1. [Enable Analytics](#)

Before you create an app from the Customer Lifecycle Analytics template, enable 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.



2. [Assign Customer Lifecycle Analytics Administrator Permissions](#)  
Enable administrators 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. [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.
7. [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.
8. [Understand Einstein Customer Lifecycle Analytics Limitations](#)  
The Customer Lifecycle Analytics app gives you access to most of the Einstein Analytics capabilities, but with limitations.
9. [Configure Feedback Scorecards](#)  
Configure feedback scorecards before you use them.
10. [Embed Customer Lifecycle Analytics Dashboards in Lightning Pages](#)  
Customer Lifecycle Analytics includes dashboards you can embed and access in Lightning Experience pages.

## Enable Analytics

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

-  **Note:** If you see the **Launch Einstein Analytics** button, 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 Einstein Analytics**.

### EDITIONS

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

## Assign Customer Lifecycle Analytics Administrator Permissions

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

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 both the **Einstein Analytics Plus Admin** and **Customer Experience Analytics Admin** permission sets.
5. Click **Add**, then click **Save**.

### EDITIONS

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

- 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.

- From **Setup**, enter *users* in the **Quick Find** box, and then select **Users**.
- Click the name of a user who requires access to Customer Lifecycle Analytics.
- Click **Permission Set Assignments**, and then click **Edit Assignments**.
- Select both the **Einstein Analytics Plus User** and **Customer Experience Analytics User** permission sets.
- Click **Add**, then click **Save**.
- Repeat Steps 2–5 for all the users who create and manage the Customer Lifecycle Analytics app.

### EDITIONS

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

## 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.

Your org must have at least one record in each of the following objects:

- Survey
- SurveyQuestion
- SurveyQuestionResponse
- SurveyVersion
- SurveyInvitation
- SurveySubject
- Account
- SurveyQuestionChoice

### EDITIONS


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

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.

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](#).

- From **Setup**, go to **Object Manager**.
- In the **Quick Find** search box, enter the name of the object whose field-level security you want to edit.
- Select the object, then select **Fields & Relationships**.

### EDITIONS

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

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.

## 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.


1. Navigate to **Analytics Studio**.
2. Click **Create**, then select **App**.
3. Click **Create App from Template**.
4. Select **Customer Lifecycle Analytics**. Then click **Continue**.
5. Take a quick look at the preview page, and click **Continue** to open the configuration wizard.
6. If you want to create an app or use settings from an existing app, make a selection and click **Continue**.
7. Analytics performs a compatibility check of your org's data. If it uncovers any issues, you see error messages with instructions about how to address them. Fix the issues and try app creation again. If it completes successfully, click **Looks good, next**.
8. The next page of the wizard asks if you'd like to add Einstein Discovery predictions. To add the Einstein Discovery story to the app, select **Yes**. The Einstein Discovery story predicts the likelihood of survey responses.
9. Click **Looks good, next**.
10. Name your app and click **Create**.

View the status of the app creation on the next page. The process takes a few minutes. Once 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.

 **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  in the upper right corner.
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**.

### EDITIONS

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

## 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.

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**.

### EDITIONS

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

## Understand Einstein Customer Lifecycle Analytics Limitations




The Customer Lifecycle Analytics app gives you access to most of the Einstein 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	Supports
Data sources	Salesforce and external data
Object support	Standard and custom objects
Data volume	10 billion rows for Analytics Plus.
Customize existing dashboards?	Yes
Create new dashboards?	Yes
Customize existing datasets?	Yes
Create new datasets?	Yes
Create custom Analytics apps?	Yes
Supports Einstein Discovery and Community Cloud integration?	Yes
Supports bulk actions and APEX steps?	Yes
Supports Sales Cloud Einstein AI features?	No
Supports Salesforce Inbox?	No

## Configure Feedback Scorecards

Configure feedback scorecards before you use them.

1. From the app launcher, select **Analytics Studio** to open the Analytics home page.
2. Under **Browse** in the left column, select **All Items**.
3. Select the **Apps** tab, then select your app.
4. Click **Lenses**.
5. Click **Scorecard Configuration File Structure**.
6. Click , then click **Share**.
7. Select the **Download** tab, then click **Download in CSV Format**.
8. After the download completes, open the CSV file and enter these details:
  - **ObjectType**: The type of object that the scorecard is being configured for. Supported objects are Contact, Account, Person Account, and Case.
  - **SurveyID**: The identifier of the survey that the question is picked from.
  - **QuestionID**: The identifier of the question associated with the stage.
  - **SurveyName**: The name of the survey that the question is picked from.
  - **QuestionName**: The question associated with the stage. Analytics calculates the stage's score based on the response to this question.
  - **QuestionType**: The question type associated with the object. Supported question types are NPS and Rating.
  - **SurveyVersionID**: The identifier of the survey version that the question is picked from.
  - **VersionNumber**: The version number of the survey that the question is picked from.
  - **Context**: The type of page where you want to embed the scorecard.
9. Navigate to your app in Analytics Studio.
10. Click **Datasets**.
11. Click  to the far right of **Scorecard Survey Question Config Metadata**.
12. Click **Edit**.
13. Click .
14. Select the updated CSV file for upload by performing one of these steps:
  - Click **Select a file or drag it here**, then select the file and click **Open**.
  - Drag the file into the file drop area.
15. Click **Next**.


### EDITIONS

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

## Embed Customer Lifecycle Analytics Dashboards in Lightning Pages

Customer Lifecycle Analytics includes dashboards you can embed and access in Lightning Experience pages.

For general instructions, see [Embed Analytics Dashboards in Lightning Pages](#) in Salesforce Help. Here are specifics about each dashboard, including the code for the filter attribute set in Step 4 of [Embed Analytics Dashboards in Lightning Pages](#).

 **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 journey dashboard, use the following string in the Filter String box:

```
{"datasets":{"Contacts12":[{"fields":["Id"],"filter":{"operator":"in","values":["$Id"]}]}]}
```

### EDITIONS

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

## 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.

 **Note:** If the Customer Lifecycle Analytics app isn't available in your org, direct your administrator to [Deploy Customer Lifecycle Analytics](#) on page 36.

The Customer Lifecycle Analytics app includes two types of dashboards:

- Dashboards accessed through the app in Analytics Studio.
- Embedded dashboards that deliver insights from within the context of Salesforce objects you work with.

### In-App Dashboards

You can access the in-app dashboards through the app in 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. Your Salesforce admin embeds these dashboards in specific Salesforce pages.

### EDITIONS

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

## In-App Dashboards

You can access the in-app dashboards through the app in Analytics Studio.

Here's some general information about the dashboards and the questions they answer.

1. From the app launcher, select **Analytics Studio** to open the Analytics home page.
2. Under **Browse** in the left column, select **All Items**.
3. Select the **Apps** tab, then click your app. If you can't immediately find it, consult your Salesforce administrator to find out the name they gave it when creating the app.

### EDITIONS

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

Now that your app is open, click the **Dashboards** tab to see a list of all the app's dashboards. Find the **Customer Lifecycle Home** dashboard, and open it. The home dashboard gives quick insight into key metrics from survey responses.

### **Customer Satisfaction Journey Map (Beta)**

Track your customer satisfaction based on the CSAT rating throughout the journey. Get answers to the following questions about the journey from the dashboard's two pages.

- **Journey Analysis**
  - Which stage of the journey needs attention?
  - How did the CSAT score trend over time?
  - What's the average CSAT score?
- **Stage Analysis**
  - 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?

### **Customer NPS Journey Map (Beta)**

Gain insight into your customer loyalty based on the NPS throughout the journey. Get answers to the following questions about the journey from the dashboard's two pages.

- **Journey Analysis**
  - Which stage of the journey needs attention?
  - How did the NPS trend over time?
  - What's the average NPS?
- **Stage Analysis**
  - How satisfied are my customers?
  - What's the change in NPS for a selected period?
  - How did the NPS across stages trend over time?

### **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.

- 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?

### **Response Distribution**

Get an overview of the response distribution across surveys and customer journeys. The dashboard's charts answer the following 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?

## 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. Your Salesforce admin embeds these dashboards in specific Salesforce pages.

Here's some general information about the dashboards and the questions they answer.

### Single Customer's NPS Journey (Beta)

Analyze the customer journey experience based on NPS given by a customer.

- Which stage of the customer's journey needs attention?
- What's the average score across stages of the customer journey?
- What's the latest NPS?

### Single Customer's CSAT Journey (Beta)

Analyze the customer journey experience based on CSAT rating given by a customer.

- Which stage of the customer's journey needs attention?
- What's the average rating across stages of the customer journey?
- What's the latest CSAT rating?

### Customer NPS Journey (Beta)

Gain insight into your customer journey experience based on the NPS scores given by multiple customers.

- Which stage of the customer's journey can be improved?
- What's the NPS for the journey?
- How many customers responded to the survey?
- What's the total customer base?
- How many responses did we get?

### Customer CSAT Journey (Beta)

Gain insight into your customer journey experience based on the CSAT rating given by multiple customers.

- What's the current CSAT rating?
- What's the average CSAT rating?
- How many responses did we get?
- Which stage of the customer's journey can be improved?

### Embedded Scorecards

- **Case Customer Satisfaction**
  - What's the latest CSAT rating for the case?
  - What's the average of all ratings?
- **Contact Customer Satisfaction**
  - What's the latest CSAT rating of the contact?
  - What's the average of all ratings?
- **Person Account Customer Satisfaction**
  - What's the latest CSAT rating of the person account?

#### EDITIONS

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



- What's the average of all ratings?
- **Contact Net Promoter Score (NPS)**
  - What's the latest NPS of the contact?
  - What's the overall NPS?
- **Person Account Net Promoter Score (NPS)**
  - What's the latest NPS of the person account?
  - What's the overall NPS?
- **Account Net Promoter Score (NPS)**
  - What's the latest NPS of the account?
  - What's the overall NPS?

## Resources

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

### Help

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[Salesforce Surveys Object Model](#)

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[Salesforce Surveys Translation REST API Resources](#)

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[Supported Browsers](#)

### Trailhead

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[Survey Basics \(module\)](#)

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[Salesforce Surveys for Admins \(module\)](#)

# INDEX

## S

### Surveys

- communities [5](#)
- guest users [5](#)
- invitation settings [22](#)

### Surveys (*continued*)

- make a copy [16](#)
- page properties [14](#)
- question types [13](#)
- standard object permissions [5](#)
- view survey data [30](#)