Enhance Customer Experience with Salesforce Surveys and Feedback Management

Salesforce, Spring ‘22

’22
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Create engaging, easy-to-use surveys by using a simple editor to collect feedback and information from your customers. With Feedback Management capabilities, you can deliver relevant and personalized experiences to your customers. Feedback Management simplifies your feedback management process and maps the feedback to existing customer records at every stage of the customer lifecycle.

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.

Implement Feedback Management to understand the sentiment of your customers and how feedback evolves in a customer’s journey over time.

**Compare Licenses and Supported Survey Capabilities**

Salesforce provides three types of survey licenses: Survey Response Pack, Salesforce Feedback Management - Starter, and Salesforce Feedback Management - Growth. The capabilities that you can use in your survey depend on the licenses that you have. See the features that come with the licenses so that you can get licenses based on your business requirements.

**Set Up Surveys**

Enable Surveys in your org, and then set up Surveys based on your requirements. You can give users inside 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.

**Configure Permissions for Feedback Management Users**

Assign your administrators and users a profile or permission set that has either the Salesforce Feedback Management - Starter or Salesforce Feedback Management - Growth license enabled.

**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.

**Enhance Your Survey Design with Salesforce Feedback Management**

Design surveys to personalize your participants’ experience. Manage documents that participants share along with their responses. Add context to your surveys by mapping the responses, Net Promoter Score (NPS), and customer satisfaction (CSAT) scores to your org.

**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.

**Add Ways to Distribute Surveys with Salesforce Feedback Management**

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.

Salesforce Surveys for Developers
Developers can take advantage of Salesforce Surveys developer resources to weave their magic.

Translate Your Surveys
Gather insight from your global audience by translating your surveys. You can translate surveys only in languages to which you are assigned as a translator in the Translation Workbench.

FAQs
These are common questions encountered when using Salesforce Surveys.

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

Compare Licenses and Supported Survey Capabilities

Salesforce provides three types of survey licenses: Survey Response Pack, Salesforce Feedback Management - Starter, and Salesforce Feedback Management - Growth. The capabilities that you can use in your survey depend on the licenses that you have. See the features that come with the licenses so that you can get licenses based on your business requirements.

These are the survey licenses offered:

- Survey response pack: Lets you create and send unlimited survey invitations and receive 1000 responses in each response pack that you purchase.
- Salesforce feedback management licenses:
  - Starter: Lets users who have started the feedback management journey generate responses from a limited audience.
  - Growth: Lets users who have an established feedback management program use analytics extensively throughout the customer experience journey. You can use this license to embed the survey invitations on external webpages.

<table>
<thead>
<tr>
<th>Capability</th>
<th>Benefits</th>
<th>Survey Response Pack</th>
<th>Salesforce Feedback Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic capabilities</td>
<td>Create surveys with basic survey questions</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Use a wide range of question types to keep your participants engaged.</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Apply branching logic</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Decide which page participants view next based on their previous responses.</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Capability</td>
<td>Benefits</td>
<td>Survey Response Pack</td>
<td>Salesforce Feedback Management</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
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<td>-------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Embed a question in email</td>
<td>Embed a question of the type Like or Dislike, Net Promoter Score (NPS), Rating, or Score in your survey invitation email.</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Send survey invitation by using the flow builder</td>
<td>Send survey invitations to leads, contacts, and your Salesforce users from flows.</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Configure the supported survey languages</td>
<td>Customize the survey based on language preference of the participants.</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receive responses</td>
<td>Receive responses during the entire license agreement period. This feature lets you track the number of responses received by your Salesforce org.</td>
<td>1000 per pack</td>
<td>1,00,000 responses. Get more responses with additional response packs.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Note:</td>
<td>The limits on your Salesforce edition determine the limits on survey responses, survey invitations, and other Survey objects.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced capabilities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add an attachment question to the survey</td>
<td>Lets participants add attachments such as documents, images, and spreadsheets.</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use merge fields</td>
<td>Add merge fields in your surveys to provide participants a personalized experience. Merge fields resolve information that's already available in your Salesforce org.</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create page branching logic based on merge fields</td>
<td>Use merge fields to define page branching logic. Create conditions that decide which survey pages participants can view based on the information that a merge field resolves.</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

3
<table>
<thead>
<tr>
<th>Capability</th>
<th>Benefits</th>
<th>Survey Response Pack</th>
<th>Salesforce Feedback Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create or update records based on participant responses</td>
<td>Create or update records in your Salesforce org based on participant responses. Configure survey data maps to either map participant responses to object fields or populate fields with custom values. You can also map fields with information from the record associated with the invitation.</td>
<td>No</td>
<td>Yes, for communities only</td>
</tr>
<tr>
<td>Gather post-chat feedback</td>
<td>Lets customers respond to a survey within the chat window at the end of a chat session on a website or on an Experience Cloud site.</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Embed a survey in a webpage</td>
<td>Embed a survey in a webpage to allow visitors to respond to the survey.</td>
<td>No</td>
<td>Yes, for communities only</td>
</tr>
<tr>
<td>Track surveys sent across customer lifecycle</td>
<td>Use Customer Lifecycle Maps to define the stages in a customer’s lifecycle and add survey questions for each stage. Define whether the map is used to track NPS or the customer’s satisfaction score. To gather actionable insights on these scores, use Customer Lifecycle Analytics.</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Use Customer Lifecycle Analytics</td>
<td>Salesforce provides five user licenses for Customer Lifecycle Analytics Base App. Use the Customer Lifecycle Analytics template to create your own apps and analyze the survey responses of your customers and employees.</td>
<td>Yes, as an add-on license</td>
<td>Yes, five user licenses</td>
</tr>
</tbody>
</table>
Customer Lifecycle Analytics Base App

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

SEE ALSO:
- Assign Permission Sets to a Single User
- User Permissions

Customer Lifecycle Analytics Base App

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

Note: To use the Customer Lifecycle Analytics Base app you must have either the CLAAnalytics Base Admin or CLAAnalytics Base User perm sets assigned.

The Customer Lifecycle Analytics Base App license provides you with access to Customer Lifecycle Analytics with these limitations:

- You can only use data from your Salesforce org as your data sources.
- The app supports only data from the standard Salesforce objects.
- You can analyze up to 10 million rows.
- The base app license doesn’t provide your Salesforce org the permission to use Einstein Prediction Builder, Einstein Discovery in Reports, Tableau CRM Platform, and Fast Start Templates.
- Custom Tableau CRM apps can’t be created.
- Einstein Discovery isn’t available for the apps you create.

Note: Contact your Salesforce representative to subscribe to the Customer Lifecycle Analytics license if:
- You want to use the complete capabilities of Customer Lifecycle Analytics
- Your org requires more than 5 licenses.

SEE ALSO:
- Deploy and Use Customer Lifecycle Analytics
- Create and Share an App from the Customer Lifecycle Analytics Template
- Understand Customer Lifecycle Analytics Limitations
Set Up Surveys

Enable Surveys in your org, and then set up Surveys based on your requirements. You can give users inside 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.

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 to Create and Send Surveys

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

Give Users in Your Org Permission to Respond

Assign users within your Salesforce org the object permissions that allow them to respond to surveys.

Give Guest Users Permission to Respond

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

Encrypt Survey Fields

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

Configure Sharing Settings for Surveys

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

Share Surveys with Groups or Users

You can manually share a survey with users groups or with specific users in your Salesforce org. While sharing the survey, you can specify the access level of the group or user.

Allow Translators to Translate Surveys

Users in your Salesforce org need permissions that allow them to translate surveys in one or more languages.

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 Salesforce 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.

SEE ALSO:
Configure Permissions for Feedback Management Users

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.

<table>
<thead>
<tr>
<th>Access Level</th>
<th>Details</th>
<th>Requirements</th>
</tr>
</thead>
</table>
| Create multiple surveys to send to other Salesforce users in your org. | • Survey creators can invite other people in their Salesforce org to take the survey.  
• Survey participants must log in to their Salesforce accounts to take the survey. | For each user who needs to create and send surveys:  
• Associate a profile that allows the user to create and send surveys on page 9.  
• Configure sharing settings for survey objects. |
| Create multiple surveys to send to participants in a Salesforce community. | Survey creators can invite anyone in their Salesforce org or anyone who has access to your Salesforce community to take the survey. | For each user who needs to create and send surveys:  
• Associate a profile that allows the user to create and send surveys on page 9.  
• Configure sharing settings for survey objects.  
To send surveys to participants in a community:  
• Create and enable a Salesforce community.  
• Associate the community with Salesforce Surveys in setup.  
• Give Guest Users Permission to Respond  
• Provide participants Read permission to the Contact and Lead objects. |
<table>
<thead>
<tr>
<th>Access Level</th>
<th>Details</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>If you want community users to authenticate before they access a survey:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Purchase Community Login licenses for your Salesforce community.</td>
</tr>
</tbody>
</table>

Create multiple surveys to send to any participant. Survey creators can invite any participant to take the survey. Participants don’t have to be part of your org or community.

For each user who needs to create and send surveys:
• Associate a profile that allows the user to create and send surveys on page 9.
• Configure sharing settings for survey objects.

To send surveys to participants:
• Create and enable a Salesforce community.
• Enable public access to the community.
• Associate the community with Salesforce Surveys in setup.
• Give Guest Users Permission to Respond
• Provide participants Read permission to the Contact and Lead objects.

Enable Surveys

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

1. From Setup, in the Quick Find box, enter Survey, then select Survey, and then click Survey Settings.

2. Enable Surveys.

   When you enable Surveys, the Customer Satisfaction and Net Promoter Score sample surveys are added to your Salesforce org. These surveys help you understand how to create a survey for your org. To reuse these surveys for your org, you can create a copy.

3. To create surveys that are 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.

5. To track surveys that are sent across customers’ lifecycle, enable Customer Lifecycle Maps.

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.

⚠️ **Note:** The users must be assigned the Salesforce license.

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

The assigned profile must have the View Setup and Configuration permission enabled. To insert images in survey pages, users require Read, Create, Edit, and Delete permissions on the Asset object.

SEE ALSO:
- Profiles
- Viewing a Profile's Assigned Users
- View and Manage Users

Enable Users with a Custom Profile to Create and Send Surveys

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

⚠️ **Note:** The users must be assigned the Salesforce license.

<table>
<thead>
<tr>
<th>Object</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surveys</td>
<td>Read, Create, Edit, AND Delete</td>
</tr>
<tr>
<td>Survey Invitations</td>
<td>Read, Create, Edit, AND Delete</td>
</tr>
<tr>
<td>Survey Responses</td>
<td>Read, Create, Edit, AND Delete</td>
</tr>
<tr>
<td>Survey Subject</td>
<td>Read, Create, Edit, AND Delete</td>
</tr>
<tr>
<td>Assets</td>
<td>Read AND Create</td>
</tr>
</tbody>
</table>

⚠️ **Note:** The permissions for the Assets object allow users to insert images in survey pages.

SEE ALSO:
- Edit Object Permissions in Profiles
Give Users in Your Org Permission to Respond

Assign users within your Salesforce org the object permissions that allow them to respond to surveys.

<table>
<thead>
<tr>
<th>Object</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey</td>
<td>Read</td>
</tr>
<tr>
<td>Survey Invitations</td>
<td>Read</td>
</tr>
<tr>
<td>Survey Responses</td>
<td>Read AND Create</td>
</tr>
</tbody>
</table>

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 Experience Cloud site is selected as the default site to create public survey invitations.
3. Enter Sites in the Quick Find box, then select All Sites.
4. Open Experience Builder of the default site.
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:
<table>
<thead>
<tr>
<th>Object</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey</td>
<td>Read</td>
</tr>
<tr>
<td>Survey Invitations</td>
<td>Read</td>
</tr>
<tr>
<td>Survey Responses</td>
<td>Read AND Create</td>
</tr>
</tbody>
</table>

9. Click Save.

EDITIONS

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

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

USER PERMISSIONS

To give guest users permissions to respond to surveys:
- Customize Application
Encrypt Survey Fields

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

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

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

SEE ALSO:
Which Standard Fields Can I Encrypt?

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.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Default Internal Access</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surveys</td>
<td>Private</td>
<td>Lets only participants who have a link to the survey access it.</td>
</tr>
<tr>
<td>Survey Invitations</td>
<td>Private</td>
<td>Lets participants who received a survey invitation access the survey.</td>
</tr>
</tbody>
</table>

4. Click Save.

SEE ALSO:
Sharing Settings

EDITIONS

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

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

USER PERMISSIONS

To configure sharing settings:
- Customize Application
Share Surveys with Groups or Users

You can manually share a survey with user groups or with specific users in your Salesforce org. While sharing the survey, you can specify the access level of the group or user.

1. Switch to Salesforce Classic, and open the survey.
2. Click Sharing > Add.
3. Select whether you want to share the survey with specific user groups or with certain users.
4. Add the user groups or the users you want to provide the permission to, and select the access level.
5. 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.

Allow Translators to Translate Surveys

Users in your Salesforce org need permissions that allow them to translate surveys in one or more languages.

Users in your org require the following permissions to translate surveys:

- Permission to translate in one or more languages using the Translation Workbench
- Read permission on the Survey record
- Read and Create permissions on the Asset object. This permission allows translators to insert images in survey pages.
To allow translators to translate surveys in end-user languages or platform-only languages, see Select Languages in Your Org.

SEE ALSO:
- Translate Your Surveys
- Add Translated Languages and Translators
- Object Permissions
- View and Edit Asset Files

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.

Important: You can add custom fields to only the Survey Invitation and Survey Subject objects. The custom field isn’t available for these objects:
- Survey Question
- Survey Version
- Survey
- Survey Response
- Survey Question Choice
- Survey Page
- Survey Question Response
- Survey Question Score

These objects can’t be customized. However, you can access them in different ways from the Lightning UI.

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, the survey invitation records and the survey response records must be associated with the SurveySubject object records.

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. Also, you 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.

If there are no responses populated, create a custom code to associate SurveySubject records with SurveyInvitation and SurveyResponses.

**Sample custom code**

```java
public class CreateEntriesInSurveyInvitationRespRL {
    // Utility to create SurveyInvitation and SurveySubject record
    public static void addEntry(String associatedRecordId, String surveyId, String participantId) {
        String invitationId = createSurveyInvitation(surveyId, participantId);
        createSurveySubject(invitationId, associatedRecordId);
    }

    // Create an unauthenticated invitation by setting the surveyId and participantId
    private static String createSurveyInvitation(String surveyId, String participantId) {
        SurveyInvitation surveyInv = new SurveyInvitation();
        surveyInv.Name = 'SurveyInvitationForCase'; // add your survey invitation name here
        surveyInv.ParticipantId = participantId;
        surveyInv.CommunityId = '0DBRM0000004n4y'; // add your community id here
        surveyInv.OptionsAllowGuestUserResponse = true;
        surveyInv.SurveyId = surveyId;

        // Insert the SurveyInvitation Record
        insert surveyInv;
        return surveyInv.Id;
    }

    // Associate the above invitation to the required record (eg: Case, Opportunity...)
    private static void createSurveySubject(String invitationId, String associatedRecordId) {
        SurveySubject subj = new SurveySubject();
        subj.Name = 'Sur_Subject_for_invitation';
        subj.ParentId = invitationId; // similarly you can use survey response id to associate survey subject to a response record.
        subj.SubjectId = associatedRecordId;

        // Insert the SurveySubject Record
        insert subj;
    }
}

//Use this trigger to create a survey subject record associated to
//the Survey Response record

trigger SurveyResponseForCaseTrigger on SurveyResponse (after insert) {
    System.debug('Inside Survey response trigger ');
}
```

Salesforce Surveys and Feedback Management  
Add the Survey Invitations and Responses Related List to Objects
for(SurveyResponse sr: Trigger.New)
{
    SurveySubject subj = new SurveySubject();
    subj.Name = 'Sur_Subject_for_response';
    subj.ParentId = sr.id; //Associating survey response id

    //Get the associatedRecordId recordId (like Case, Opportunity etc) using the
    //SurveyInvitation Id and
    //assigning it to SubjectId, assuming we inserted SurveySubject record for the
    //associated invitation
    //using the previous code
    List<SurveySubject> SurSubj=[select subjectid from SurveySubject where parentid = :sr.invitationId];
    for(SurveySubject sub:SurSubj){
        String ids=String.valueOf(sub.subjectid).substring(0,3);
        if('500'.equals(ids)){
            subj.SubjectId = sub.subjectid;
            // Insert the SurveySubject Record
            insert subj;
            break;
        }
    }
}

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:
  Associate Records with Survey Invitations and Responses
  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.
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.

Add a Survey to Any Record
Use the Survey component to add a survey to object records that support Lightning Components. Then your users can employ this component to respond to the survey. You can also add the Survey component to your Experience Cloud site pages to gather responses from your guests.

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
Add a Survey to Any Record

Use the Survey component to add a survey to object records that support Lightning Components. Then your users can employ this component to respond to the survey. You can also add the Survey component to your Experience Cloud site pages to gather responses from your guests.

1. Open a record for an object that you want to add the Surveys component to.
2. From Setup, in the Quick Find box, enter Edit Page, and then 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 that you want to appear.
   The survey that you select must be active. Make sure to generate the survey invitation link from the Survey Builder.
5. Save your work, and then click Activate.

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

SEE ALSO:
- Organize Records with Tags and Topics
- Configure Topics for Records in Lightning Experience
Send Survey Records from One Salesforce 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.

Review these considerations before you create 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.
- Use only the managed or unmanaged package to export the survey.
- Use managed package versions to move multiple versions of a survey.

1. From Setup, in the Quick Find box, enter Package Manager, and then select Package Manager.
2. Click New.
3. Define your package, and then save your work.
4. In the Components tab, click Add.
5. For Component Type, select Flow Definition.
6. Select the surveys that you want to move to another org, and click Add to Package.
   
   Note: Branding sets, data maps, 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.

After the package is installed, the survey is added to the org.

Note:
- You can activate or archive the survey version.
- You can clone or copy the survey.
- You can’t edit the survey content.
- You can’t create newer versions of the survey.

Identify Surveys Added in Your Org Using Packages

You can customize the Surveys list view to easily identify the surveys that were added to your Salesforce org using managed or unmanaged packages.

SEE ALSO:

ISVforce Guide: Package and Test Your Solution
Use Merge Fields to Personalize Surveys
Identify Surveys Added in Your Org Using Packages

You can customize the Surveys list view to easily identify the surveys that were added to your Salesforce org using managed or unmanaged packages.

When you add a survey in your org using a package, the namespace prefix of the package is also associated with the Surveys record. You can add the Namespace Prefix field to your Surveys list view. The Namespace Prefix field is populated for surveys that are added using packages.

Configure Permissions for Feedback Management Users

Assign your administrators and users a profile or permission set that has either the Salesforce Feedback Management - Starter or Salesforce Feedback Management - Growth license enabled.

- After you add a Salesforce Feedback Management Growth license to your org, assign to admins and users a profile or permission set that has the Salesforce Surveys Advanced Features user permission enabled.

- After you add a Salesforce Feedback Management Starter license to your org, assign to admins and users a profile or permission set that has the Salesforce Advanced Features Starter user permission enabled.

You can enable these permissions in a cloned or new permission set or profile.

SEE ALSO:

Set Up Surveys

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 a 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.

Validate Short-Text Responses from Participants
Choose a type of validation for a response to a short-text question.

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.

Show Survey Completion Status to Participants
For each survey that you create, you can enable the Progress Bar, which allows the participants to view their survey completion status.

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 move directly to the Thank You page. Add branching logic to the page from which you want the participants to move to another page.

Define the Default Settings
Define the default email, language, and invitation settings for each survey.

Design Surveys That Let Participants Respond Within the Email Invitation
Design a survey that lets participants respond to the question embedded within the email invitation with a single click. This type of survey can contain only one question.

Survey Question Types
You can choose which types of questions to include in a survey.

<table>
<thead>
<tr>
<th>Question Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Participants select a date from a calendar.</td>
</tr>
<tr>
<td>Like or Dislike</td>
<td>Participants select whether they like something or not.</td>
</tr>
<tr>
<td>Long Text</td>
<td>Participants enter a free-form text answer.</td>
</tr>
<tr>
<td>Multiple Selection</td>
<td>Participants select multiple answers from a list of choices.</td>
</tr>
<tr>
<td>Picklist</td>
<td>Participants select an answer from a predefined list of options.</td>
</tr>
</tbody>
</table>

Note: Picklist options are stored as strings in Salesforce.
### Survey Question Types

<table>
<thead>
<tr>
<th>Question Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attachment</td>
<td>Participants share details as attachments to survey responses.</td>
</tr>
<tr>
<td>Ranking</td>
<td>Participants rank among two or more items.</td>
</tr>
<tr>
<td>Rating</td>
<td>Participants select a rating from a scale.</td>
</tr>
<tr>
<td>Net Promoter Score® (NPS®)</td>
<td>Participants score to express how willing they’re to recommend a product or a service.</td>
</tr>
<tr>
<td>Score</td>
<td>Participants select a satisfaction score from a list of numbers.</td>
</tr>
<tr>
<td>Short Text</td>
<td>Participants enter a text answer of up to 200 characters.</td>
</tr>
<tr>
<td>Single Selection</td>
<td>Participants select only one answer from a list of choices.</td>
</tr>
<tr>
<td>Slider</td>
<td>Participants select a value on a sliding scale.</td>
</tr>
</tbody>
</table>

### 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.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required</td>
<td>Indicates that a response is required.</td>
</tr>
<tr>
<td>Description</td>
<td>Lets you add a description field to the page.</td>
</tr>
</tbody>
</table>

SEE ALSO:

Create a 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.

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.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>4</td>
<td>1</td>
</tr>
</tbody>
</table>

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. From the App Launcher, find and select Surveys.
2. To open the Survey Builder, click New.
3. Enter a name for the survey.
4. To use the survey as a template survey, select Create survey as a template. Template surveys are automatically shared with Read access to all users in your Salesforce org.
5. 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 🔗.

6. To add a question page, click Add Page in the sidebar.
7. To add one or more questions to the page, click Add Question.
   To reorder questions on a survey page, click ⬆️ ⬇️ above the rich text editor of questions.
8. Optionally, click 🌐 to change the question’s properties.
9. Edit the survey’s Thank You page.
10. 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.

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 then select Make a Copy.
4. Enter a name for your new survey.
5. To use the new survey as a template survey, select Create survey as a template.
   Template surveys are automatically shared with Read access to all the users in your Salesforce org.
6. Make changes to the survey.
7. 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.

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

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:

<table>
<thead>
<tr>
<th>Survey Attributes</th>
<th>What can you change?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background Image</td>
<td>Replace the default background image with an image that’s less than 750 KB (Windows) and 763 KB (iOS). Adjust the opacity and the blur of the image. Remove the image and replace it with a background color. Tip: We recommend that you upload images with an aspect ratio of 16:9, such as 1920 x 1080 that render an enhanced viewing experience on wide-screen monitors and mobile devices.</td>
</tr>
<tr>
<td>Content Card</td>
<td>Opacity.</td>
</tr>
<tr>
<td>Questions</td>
<td>Text color.</td>
</tr>
<tr>
<td>Answer Choices</td>
<td>Text color and button color of the answer choices for the following question types: multiple selections, ranking, rating, and single selection.</td>
</tr>
</tbody>
</table>
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 Date, Long Text, Multiple Selection, Ranking, Short Text, or Slider types, participants can’t auto-progress to the next page. In that case, participants must click Next to move to the next page.

SEE ALSO:
- Design Surveys That Let Participants Respond Within the Email Invitation

Validate Short-Text Responses from Participants

Choose a type of validation for a response to a short-text question.

Add a short-text question to a survey. From the Response Validation Type list, select a validation that you want to apply to the participant response. A participant can either enter a number or a response based on a custom validation formula, such as limiting their response to special characters. By default, no validations are applied.

**Example:** These examples show custom validations for a response.

- Validate the format of an email address

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

- Validate the format of a ZIP code

  ```
  REGEX({!Zipcode},"\d{5}(-\d{4})?"")
  ```
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 for the Ranking type. Also, you can’t add responses to the Welcome Page or 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 Content.
3. Select Response from a previous question, and click Next.
   - Tip: If your survey contains page branching logic, check the survey in preview to ensure that the responses are inserted as you expect.
4. 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.

⚠️ Note: If the response to a Like or Dislike type of question is inserted, participants view the response as either True or False, and not as the text associated with the icons.

⚠️ 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. Also, if you use the rich text editor to style your question, ensure that the entire merge field is styled the same way.

⚠️ Example: A survey has two pages, with one question on each page. The first question is: How would you rate our service? For 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.

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.

Show Survey Completion Status to Participants

For each survey that you create, you can enable the Progress Bar, which allows the participants to view their survey completion status.

In a survey, click Branding, and then enable or disable Progress Bar. When you run the survey, the progress bar appears at the top.
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 move directly to the Thank You page. Add branching logic to the page from which you want the participants to move to another page.

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

- Based on participants’ previous responses
- Based on merge fields

**Note:** To create page branching logic based on merge fields, users need the Salesforce Surveys Advanced Features permission, available with the Salesforce Feedback Management license.

You can use both types of conditions to define the branching logic for a page.

### Define Page Branching Logic Based on Participant Responses

You can decide which page participants view next based on their previous responses.

### Define Page Branching Logic Based on Merge Fields

Let data from your Salesforce org decide which page participants must view next. You can define merge field conditions in page branching logic using four types of merge fields: associated records, participant record, custom variables, and org variables.

### Define Page Branching Logic Based on Participant Responses

You can decide which page participants view next based on their previous responses.

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 then 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 that 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 Logic Type as **Response to Question**.
     d. Select the question based on which condition is defined.
        **Note:** Conditions can’t be defined based on questions of the type ranking.
     e. Select the operator for the condition.
     f. Select or add the response value based on which the condition is validated.
     g. To define another conditions, click **Add Condition**.

### EDITIONS

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

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

### USER PERMISSIONS

To add branching logic to a page:

- **Profile that allows the user to create and send surveys**
h. To save all your conditions, click Create Rule.

A rule is a collection of conditions. A rule decides which page the participants view 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 New Promoter Score (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 between 7 and 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.

Define Page Branching Logic Based on Merge Fields

Let data from your Salesforce org decide which page participants must view next. You can define merge field conditions in page branching logic using four types of merge fields: associated records, participant record, custom variables, and org variables.

Here’s how each merge field type works in page branching logic:

<table>
<thead>
<tr>
<th>Merge Field Type</th>
<th>How it Works</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associated Record</td>
<td>The branching logic condition is validated against the value of the merge field in the record that’s associated with the survey invitation.</td>
</tr>
<tr>
<td></td>
<td>Note: If multiple records are associated with a survey invitation, the condition is validated against the value from the last updated record.</td>
</tr>
<tr>
<td>Participant Record</td>
<td>The branching logic condition is validated against the value of the merge field in the participant record that’s associated with the survey invitation.</td>
</tr>
<tr>
<td>Org Variable</td>
<td>The branching logic condition is validated against the value of the company information field.</td>
</tr>
<tr>
<td>Custom Variable</td>
<td>The branching logic condition is validated against the value that you defined.</td>
</tr>
</tbody>
</table>

Before you define your merge field conditions for page branching logic, you must:

- Set the access level for the merge fields on page 35
Note: If you don't set the merge field access level, the merge fields are validated in User Context - Enforce all user permissions. If participants don't have access to a field due to the merge field access level, the branching logic condition is validated against an empty value.

- **Configure the merge field variables** on page 36

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 then 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 that 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 one of the merge fields types as the Logic Type.
     d. Select the merge field based on which condition is defined.
     e. Select the operator for the condition.
     f. Select or add the value based on which the condition is validated.
     g. To define another conditions, click **Add Condition**.
     h. 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 the 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 is used to gather feedback from customers after a case is closed. The survey contains separate questions for high, medium, and low priority cases. The first question in the survey checks whether the customer is happy with the resolution provided for the case. Each of the next three pages contains questions specific to case priority. The branching logic is defined on the first page. It decides which page the participant must view next based on the priority of the participant’s Case record. The branching logic contains three rules, and each rule has one condition. The merge field used in all three rules is Priority. When a participant opens the survey, the conditions are validated against the value of the Priority field in the participant's Case record. If the Priority field value in the associated case record is High, the participant is directed to the page containing questions for high priority cases.
Define the Default Settings

Define the default email, language, and invitation settings for each survey.

To define the default settings, click on the Survey Builder, and select Default Settings.

Email Settings

The settings that you define apply to emails sent using Support Settings, Case Auto-Response Rules, and Send Survey action in Process Builder or Flows. Select whether you want to embed the survey link or a particular question within the email, and then select the email template. You can embed a question of the type Like or Dislike, Net Promoter Score (NPS), Rating, or Score. Also, select an organization-wide email address as the default sender of the survey.

Language Settings

Select the language used to create the survey. When participants outside your organization open a survey invitation, they pick the language they want to use to respond. The language that you select in Language Settings appears on the list of languages that participants can choose from. This selection also ensures that participants see survey components such as the Next or Previous buttons in the language used to create the survey.

Engagement Context Settings

Select a custom metadata type that determines the engagement context of the survey that’s sent. Setting an engagement context helps you collect additional information about the targeted participant groups. Use the engagement context information to gain actionable insights about the participants.

Invitation Settings

Survey invitations can be automatically emailed on the creation or update of associated records. You can give the record owners edit access to the survey invitation record. Edit access allows the record owner to view the responses provided by the invitation recipient. Only invitations emailed by Support Settings, Case Auto-Response Rules, and a process defined in the Process Builder are shared with record owners.

SEE ALSO:
- Send Surveys to Gather Feedback on Support Cases
- How Do Participants View Translated Surveys?
- Send Survey Invitations Using the Process Builder
- Considerations for Invitations Sent for Cases
Design Surveys That Let Participants Respond Within the Email Invitation

Design a survey that lets participants respond to the question embedded within the email invitation with a single click. This type of survey can contain only one question.

- Turn on Auto-Progress
- Disable the Welcome Page
- Add only one page with a single question in it

**Note:** The question can only be of the type Net Promoter Score, rating, or score because only these question types can be embedded within an email.

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

When the participant responds within the email, the thank you message opens in a new tab within the participant's browser.

SEE ALSO:
- Enable Auto-Progress to the Next Survey Page

Enhance Your Survey Design with Salesforce Feedback Management

Design surveys to personalize your participants' experience. Manage documents that participants share along with their responses. Add context to your surveys by mapping the responses, Net Promoter Score (NPS), and customer satisfaction (CSAT) scores to your org.

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

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

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

Enable and Configure Document Upload in Survey Responses

Collect information about profile updates such as an address change, or allow customers to upload receipts in support of warranty claims. Participants can upload documents in formats such as a document, PDF, spreadsheet, or graphic.

Use Merge Fields to Personalize Surveys

Use merge fields to give your participants personalized survey experiences. Define variables that allow you to insert merge fields that resolve to information about Salesforce records, participants, the company, and custom values. You can add merge fields to the welcome message and survey questions.

Use Survey Data Maps to Create or Update Records

Use survey data maps to create or update records in your Salesforce org based on participant responses.
Enable and Configure Document Upload in Survey Responses

Collect information about profile updates such as an address change, or allow customers to upload receipts in support of warranty claims. Participants can upload documents in formats such as a document, PDF, spreadsheet, or graphic.

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

**Important:** You can’t create a public invitation for a survey with attachment type or for an anonymous user. A guest user can upload attachments to any valid survey invitation.

1. Create a survey or open a survey in the Survey Builder.
2. Add a page and click **Add Question** and then select **Attachment**.
3. To allow participants to upload attachments based on your requirements, configure these options:
   a. Enable the **Allow Only Specified File Types** option.
      To let participants upload any type of attachment, leave the option disabled.
   b. In the dropdown, select an attachment type.
      - PDF
      - Spreadsheet
      - Document
      - Graphic
4. In **Maximum Attachments to Upload**, select the maximum attachments of all attachment types that a participant can upload.
5. In **Maximum File Size**, select the size of each file that a participant can upload.
6. Save and activate the survey.
   A participant responding to the survey can upload a maximum of 10 files for all attachment type questions listed in the survey invitation.

SEE ALSO:

How to let Community Guest Users add files in Salesforce?
Use Merge Fields to Personalize Surveys

Use merge fields to give your participants personalized survey experiences. Define variables that allow you to insert merge fields that resolve to information about Salesforce records, participants, the company, and custom values. You can add merge fields to the welcome message and survey questions.

Merge fields only resolve to information about the record that is associated with the survey invitation using SurveySubject.

Tip: You can use Support Settings, Case Auto-Response Rules, and processes you define in the Process Builder to email survey invitations. The survey invitation is automatically associated with the record that generated the invitation upon creation or update.

You can set the access level that decides which merge fields resolve for a participant based on the participant's permissions. If a participant doesn't have access to a merge field's object, the survey doesn't open. If the field that a merge field resolves to is empty, the merge field resolves to an empty value.

Warning: When the participant doesn't have access to an object referenced by a merge field, the merge fields in email invitations don't resolve. Polymorphic merge fields also don't resolve in email invitations.

Select Merge Field Access Level for Participants
Select the merge field access level for each survey to ensure that participants view only the Salesforce data that you want them to. When a participant opens a survey, the merge fields that resolve are the ones with data the participant has access to based on the merge field access level you selected.

Configure Variables for Merge Fields
Variables allow you to define the type of information you want to insert as merge fields for the Welcome Page or questions. Configure variables that allow merge fields to resolve to information about the record associated to an invitation, participant details, company information, and custom values.

Insert Merge Fields
Insert merge fields to personalize the survey for each participant. You can insert merge fields on the Welcome Page and in survey questions.

Provide Merge Field Values for Preview
Preview surveys to see how participants view surveys when the merge fields resolve to data from your Salesforce org or custom values. Merge fields only resolve in Preview when the access level for the merge fields is set to User Context - Enforce all user permissions.

SEE ALSO:
Send Survey Records from One Salesforce Org to Another
Select Merge Field Access Level for Participants

Select the merge field access level for each survey to ensure that participants view only the Salesforce data that you want them to. When a participant opens a survey, the merge fields that resolve are the ones with data the participant has access to based on the merge field access level you selected.

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

Here are the types of access levels you can choose from:

<table>
<thead>
<tr>
<th>Access level</th>
<th>How it works</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Context - Enforce all user permissions</td>
<td>Respects the participant’s profile and permission sets. Participant’s profile and permission sets determine their object permissions and field-level access.</td>
</tr>
<tr>
<td>System Context - Enforce record-level access</td>
<td>Respects the org-wide default settings, role hierarchies, sharing rules, manual sharing, teams, and territories. Doesn’t respect the participant’s object permissions, field-level access, or other permissions.</td>
</tr>
<tr>
<td>System Context - Ignore record-level access</td>
<td>Considers that the participant has access to all data in your Salesforce org. Resolves all the merge fields.</td>
</tr>
</tbody>
</table>

1. In the Survey Builder, click Advanced Settings, and select Merge Field Variables.
2. In the Merge Field Access Level section, select the access level.

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

If you select either of the system contexts, a badge displays on the header of the Survey Builder. The badge reads: System Context. This badge helps survey creators identify the merge field access level, especially when they view a survey that a package added to your org.

SEE ALSO:
- Running User of a Flow
- Always Run in System Context
Configure Variables for Merge Fields

Variables allow you to define the type of information you want to insert as merge fields for the Welcome Page or questions. Configure variables that allow merge fields to resolve to information about the record associated to an invitation, participant details, company information, and custom values.

You can add up to 25 merge fields, excluding merge fields that resolve to the ID of records.

1. In the Survey Builder, click Advanced Settings, and select Merge Field Variables.

2. In the Object Variables for Merge Fields section, define the following variables:
   - Associated Object: Name the variable and select the object whose records are associated with invitations of this survey. Use this variable to insert merge fields that resolve to information about the associated record.
   - Participant Object: Name the variable and select the object that stores the participant records. Use this variable to insert merge fields that resolve to information about the participant associated with the survey invitation.

3. Save the Associated Object and Participant Object variables.

4. In the Org and Custom Variables section, create the following types of variables:
   - Org: Create variables that are used to insert merge fields that resolve to information about the company.
   - Custom: Create variables with your own values and use merge fields to insert the custom values.

5. Save the org and custom variables.

Example: If your survey is designed to gather feedback from contacts on the closure of a case, you can create variables to insert specific information. Examples include case subject, contact’s first name, the company’s name, and the service team’s name. Select Case as the associated object and Contact as the participant object. In the Org and Custom Variables section, you must create an org variable and select the Name as the Variable Value. To add the service team’s name, create a custom variable and enter the service team’s name as the Variable Value.
**Insert Merge Fields**

Insert merge fields to personalize the survey for each participant. You can insert merge fields on the Welcome Page and in survey questions.

Before you insert the merge fields, ensure that you configure the merge field variables for this survey.

1. Open the survey in the Survey Builder.
2. On the Welcome Page or in a survey question, place the cursor where you want to insert a merge field, and click **Insert Content**.
3. Select the type of variable you want to insert, and click **Next**.

You can insert merge fields using only the variable types configured for this survey.

4. Select the merge field you want to insert:

<table>
<thead>
<tr>
<th>Variable Type</th>
<th>Merge Field</th>
<th>Participants See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associated record</td>
<td>Select the field that contains the associated record information you want to insert.</td>
<td>The value of the field in the record that’s associated with the invitation the participant used to open the survey.</td>
</tr>
<tr>
<td>Participant record</td>
<td>Select the field that contains the participant record information you want to insert.</td>
<td>The value of the field in the participant’s record.</td>
</tr>
<tr>
<td>Org variable</td>
<td>Select the company information you want to insert.</td>
<td>The value of the company information.</td>
</tr>
<tr>
<td>Custom variable</td>
<td>Select the custom value you want to insert.</td>
<td>The custom value.</td>
</tr>
</tbody>
</table>

**Warning**: If the user edits a merge field by mistake and removes a word or character, the merge field becomes invalid. Broken merge fields don’t resolve when participants open the survey.

5. Click **Insert**.
To insert merge fields in the welcome message description, question description, or answer choices, enter the merge fields manually. Or insert them in the welcome message or question, and then copy it.

Note: Merge fields that are inserted in the scale labels of a rating question don’t resolve within the invitation email.

Provide Merge Field Values for Preview

Preview surveys to see how participants view surveys when the merge fields resolve to data from your Salesforce org or custom values. Merge fields only resolve in Preview when the access level for the merge fields is set to User Context - Enforce all user permissions.

When you preview the survey in the user context, always select records for merge fields that use associated record variables or participant record variables. In Preview, the merge fields are resolved using information from these records. You can also enter values for each custom variable that’s used in merge fields. You can’t provide values for merge fields that use org variables because the merge fields automatically resolve.

Warning: You can’t preview surveys when the merge fields access level is set to either System Context: Enforce record-level access or System Context: Ignore record-level access.

Use Survey Data Maps to Create or Update Records

Use survey data maps to create or update records in your Salesforce org based on participant responses.

You can create records of objects available in your org. You can also update records of objects that can be associated with survey invitation and survey response records by using SurveySubject. A survey data map updates a record only when the survey invitation used by the participant to respond is associated with a record using SurveySubject.

Tip: You can use Support Settings, Case Auto-Response Rules, and processes you define in the Process Builder to email survey invitations. A survey invitation is associated with the record that generated the invitation.

You can create up to 20 data maps for a survey. You can use a data map to create or update records of only one object. You can also use the data maps to define conditions that decide whether records are created or updated.

You can create or update a record with:

- Responses provided by the participant
- Constant values of your choice
- ID of the record associated with the survey invitation
- ID of a record created by another data map
- Merge fields, such as associated record or participant record
- Predefined custom or org variables
- A timestamp

Note: A participant merge field of the type User doesn’t resolve for anonymous survey invitations because there’s no participant ID associated with the survey response.
Example: Every year, a solar panel manufacturer gathers customer satisfaction scores and asks if their solar panels require servicing. Here are the questions in the survey:

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

The survey contains two data maps. One map creates a Case record whenever a customer provides a score of 3 or less. The other map creates a Task record if the customer indicates that their solar panel requires servicing. Here’s how some of the fields are mapped in each data map:

• Data map that creates Case records:
  – The Contact ID of the participants is mapped to the Contact ID of the case.
  – The Escalated field is mapped to True.
  – The Subject field is mapped to the constant value: Customer satisfaction score is less than 5.
  – The Description field is mapped to the response to the follow-up question asking about the reasons for the customer satisfaction score.

• Data map that creates Task records:
  – Related to ID field is mapped to the ID of the case created by the previous data map.
  – The Subject field is mapped to the constant value: Solar Panel requires servicing.
  – The Status field is mapped to Not Started.

Create a Data Map

Create a survey data map to create or update records in your org based on participant responses. You can choose the values to map to the record fields.
Create a Data Map

Create a survey data map to create or update records in your org based on participant responses. You can choose the values to map to the record fields.

Create or update target objects whenever a response is registered or based on the defined conditions. Define fields when creating conditions for your data map.

Note: The merge fields display values as API names. For example, to add an owner name, select OwnerId.

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response to Question</td>
<td>Select a question in the survey and define related values to set as a condition.</td>
</tr>
<tr>
<td>Associated Record</td>
<td>Create a condition based on the associated record information.</td>
</tr>
<tr>
<td>Participant Record</td>
<td>Create a condition based on the participant information that is associated with the survey invitation.</td>
</tr>
<tr>
<td>Custom Variable</td>
<td>Create a condition based on the value defined for the variable.</td>
</tr>
<tr>
<td>Org Variable</td>
<td>Create a condition based on company information.</td>
</tr>
</tbody>
</table>

Based on a field's type, map a field with these types of information.

<table>
<thead>
<tr>
<th>Information Type</th>
<th>Mapped Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>String</td>
<td>Provide a constant value.</td>
</tr>
<tr>
<td>Picklist</td>
<td></td>
</tr>
<tr>
<td>Boolean</td>
<td></td>
</tr>
<tr>
<td>Currency</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>DateTime</td>
<td></td>
</tr>
<tr>
<td>Response to Question</td>
<td>Choose a question whose response is populated.</td>
</tr>
</tbody>
</table>

Note: If the participant doesn’t respond to a question, the field mapped to the question remains blank.
<table>
<thead>
<tr>
<th>Information Type</th>
<th>Mapped Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associated Record ID</td>
<td>Populate the ID of the record that is associated with the survey invitation. Note: If multiple records are associated with a survey invitation, the ID of the latest association is populated.</td>
</tr>
<tr>
<td>Associated Record</td>
<td>Select a field value from the associated record configured as merge field.</td>
</tr>
<tr>
<td>Participant Record</td>
<td>Select a field value from the participant record configured as merge field.</td>
</tr>
<tr>
<td>Custom Variable</td>
<td>Select a predefined value.</td>
</tr>
<tr>
<td>Org Variable</td>
<td>Select predefined information about your company.</td>
</tr>
<tr>
<td>Last Modified Timestamp</td>
<td>Select the latest data map execution timestamp that you want to add to a record.</td>
</tr>
<tr>
<td>Existing Map</td>
<td>If you defined a map previously, map the ID of the record created or updated by the previous map. Note: If your data map is used to create a record, you can map an existing map.</td>
</tr>
</tbody>
</table>

If you map a field to a question’s response, here are the question types whose responses can be mapped to each supported field type.

<table>
<thead>
<tr>
<th>Field Types</th>
<th>Supported Question Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Int</td>
<td>Scoring, Net Promoter Score, Slider, Rating, Short Text, and Long Text</td>
</tr>
<tr>
<td>Date</td>
<td>Date</td>
</tr>
<tr>
<td>Date Time</td>
<td>Date</td>
</tr>
<tr>
<td>String</td>
<td>Scoring, Net Promoter Score, Slider, Rating, Short Text, Long Text, Picklist, and Single Selection</td>
</tr>
<tr>
<td>Currency</td>
<td>Scoring, Net Promoter Score, Slider, Rating, Short Text, and Long Text</td>
</tr>
<tr>
<td>Percent</td>
<td>Scoring, Net Promoter Score, Slider, Rating, Short Text, and Long Text</td>
</tr>
<tr>
<td>Double</td>
<td>Scoring, Net Promoter Score, Slider, Rating, Short Text, and Long Text</td>
</tr>
<tr>
<td>Picklist</td>
<td>Picklist and Single Selection</td>
</tr>
<tr>
<td>Multi Select Picklist</td>
<td>Picklist and Single Selection</td>
</tr>
<tr>
<td>Email</td>
<td>Short Text and Long Text</td>
</tr>
<tr>
<td>URL</td>
<td>Short Text and Long Text</td>
</tr>
<tr>
<td>Phone</td>
<td>Short Text and Long Text</td>
</tr>
<tr>
<td>Boolean</td>
<td>Single Selection, Picklist, and Like or Dislike</td>
</tr>
</tbody>
</table>
### Field Types

<table>
<thead>
<tr>
<th>Field Types</th>
<th>Supported Question Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Short Text and Long Text</td>
</tr>
<tr>
<td>Address</td>
<td>Short Text and Long Text</td>
</tr>
<tr>
<td>Long</td>
<td>Scoring, Net Promoter Score, Slider, Rating, Short Text, and Long Text</td>
</tr>
</tbody>
</table>

*Note:* You can’t map responses provided for multiple selection and ranking questions to object fields.

If you map a field to a custom variable, here is the information about the field types that a custom variable supports.

<table>
<thead>
<tr>
<th>Field Types</th>
<th>Supports Custom Variables?</th>
</tr>
</thead>
<tbody>
<tr>
<td>String</td>
<td>Yes</td>
</tr>
<tr>
<td>Text area</td>
<td>Yes</td>
</tr>
<tr>
<td>Phone</td>
<td>Yes</td>
</tr>
<tr>
<td>Email</td>
<td>No</td>
</tr>
<tr>
<td>URL</td>
<td>Yes</td>
</tr>
<tr>
<td>Boolean</td>
<td>No</td>
</tr>
<tr>
<td>Currency</td>
<td>No</td>
</tr>
<tr>
<td>Int</td>
<td>No</td>
</tr>
<tr>
<td>Long</td>
<td>No</td>
</tr>
<tr>
<td>Double</td>
<td>No</td>
</tr>
<tr>
<td>Percent</td>
<td>No</td>
</tr>
<tr>
<td>Date time</td>
<td>No</td>
</tr>
<tr>
<td>Time</td>
<td>No</td>
</tr>
<tr>
<td>Date</td>
<td>No</td>
</tr>
<tr>
<td>ID</td>
<td>Yes</td>
</tr>
<tr>
<td>Picklist</td>
<td>No</td>
</tr>
<tr>
<td>Multipicklist</td>
<td>No</td>
</tr>
<tr>
<td>Address</td>
<td>Yes</td>
</tr>
</tbody>
</table>

If you map a field to an organization variable, here is the information about the field types that support the organization variables. These are the organization variables that you can configure: City; Country; Division; Fax; Organization ID; Latitude; Longitude; Name; Phone; Zip/Postal Code; State/Province; Street
<table>
<thead>
<tr>
<th>Field Types</th>
<th>Supported Organization Variables</th>
</tr>
</thead>
<tbody>
<tr>
<td>String</td>
<td>All</td>
</tr>
<tr>
<td>Text area</td>
<td>All</td>
</tr>
<tr>
<td>Phone</td>
<td>All</td>
</tr>
<tr>
<td>Email</td>
<td>None</td>
</tr>
<tr>
<td>URL</td>
<td>None</td>
</tr>
<tr>
<td>Boolean</td>
<td>None</td>
</tr>
<tr>
<td>Currency</td>
<td>None</td>
</tr>
<tr>
<td>Int</td>
<td>• Latitude</td>
</tr>
<tr>
<td></td>
<td>• Longitude</td>
</tr>
<tr>
<td>Long</td>
<td>• Latitude</td>
</tr>
<tr>
<td></td>
<td>• Longitude</td>
</tr>
<tr>
<td>Double</td>
<td>• Latitude</td>
</tr>
<tr>
<td></td>
<td>• Longitude</td>
</tr>
<tr>
<td>Percent</td>
<td>• Latitude</td>
</tr>
<tr>
<td></td>
<td>• Longitude</td>
</tr>
<tr>
<td>Date time</td>
<td>None</td>
</tr>
<tr>
<td>Time</td>
<td>None</td>
</tr>
<tr>
<td>Date</td>
<td>None</td>
</tr>
<tr>
<td>ID</td>
<td>None</td>
</tr>
<tr>
<td>Picklist</td>
<td>None</td>
</tr>
<tr>
<td>Multipicklist</td>
<td>None</td>
</tr>
<tr>
<td>Address</td>
<td>All</td>
</tr>
</tbody>
</table>

If you map a field with an associated record or a participant record, here is the information about the merge fields value type supported for each field type.

<table>
<thead>
<tr>
<th>Field Types</th>
<th>Associated Record - Supported Merge Fields Value Type</th>
<th>Participant Record - Supported Merge Fields Value Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>String</td>
<td>All</td>
<td>All</td>
</tr>
<tr>
<td>Text area</td>
<td>All</td>
<td>All</td>
</tr>
<tr>
<td>Phone</td>
<td>• String</td>
<td>• String</td>
</tr>
<tr>
<td>Field Types</td>
<td>Associated Record - Supported Merge Fields Value Type</td>
<td>Participant Record - Supported Merge Fields Value Type</td>
</tr>
<tr>
<td>-------------</td>
<td>-----------------------------------------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>Email</td>
<td>Email</td>
<td>Email</td>
</tr>
<tr>
<td>URL</td>
<td>URL, String, Int, Long</td>
<td>URL, String, Int, Long</td>
</tr>
<tr>
<td>Boolean</td>
<td>Boolean</td>
<td>Boolean</td>
</tr>
<tr>
<td>Currency</td>
<td>Currency, Int, Double</td>
<td>Currency, Int, Double</td>
</tr>
<tr>
<td>Int</td>
<td>Int</td>
<td>Int</td>
</tr>
<tr>
<td>Long</td>
<td>Long, Int</td>
<td>Long, Int</td>
</tr>
<tr>
<td>Double</td>
<td>Double</td>
<td>Double</td>
</tr>
<tr>
<td>Percent</td>
<td>Percent</td>
<td>Percent</td>
</tr>
<tr>
<td>Date time</td>
<td>Date time</td>
<td>Date time</td>
</tr>
<tr>
<td>Time</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Date</td>
<td>Date</td>
<td>Date</td>
</tr>
<tr>
<td>ID</td>
<td>String, ID</td>
<td>String, ID</td>
</tr>
<tr>
<td>Picklist</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Multipicklist</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Address</td>
<td>Address, String, Text area, Int, Long, Reference</td>
<td>Address, String, Text area, Int, Long, Reference</td>
</tr>
</tbody>
</table>
1. In the Survey Builder, click **Advanced Settings**, and then select **Survey Data Mapping**.

2. Click **New Mapping**.

3. Name the map.

4. Choose whether to create or update records.

5. Select the object whose records you want to create or update.

   **Note**: You can create records of objects available in your org. You can update records of objects that are associated with survey invitation and survey response records using SurveySubject.

6. Define the data map conditions for creating or updating records.

7. Map the object’s fields with the values to be populated.

8. Save the map.

---

**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 Experience Cloud site members, you must belong to that site.

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

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

**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.

**Share QR Code Containing Survey Invitation**

Download a QR code containing a survey invitation and share it with 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: Like or Dislike, Net Promoter Score (NPS), Rating, 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.

**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 Survey Invitations Using Flows
Send survey invitations to leads, contacts, and your Salesforce users from flows. Send participants reminders to complete surveys. Identify and choose participants to send survey invites to based on whether they responded to a survey recently. To schedule survey invitations use a flow.

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.

Share and Grant Access to Surveys
Collect feedback for your survey design by sharing survey drafts with your team. Publish and share survey results and analytics data with users. While sharing surveys, you can give access to individuals or groups.

View the List of Survey Users and User Hierarchy
View the details of users who have access to a survey. You can also view various user access information such as type of user, reason for granting access, relationship, and user access level.

Send Surveys During a Marketing Campaign
Use the Survey Invitation object in Journey Builder to send survey invitations during a marketing campaign.

Associate Records with Survey Invitations and Responses
You can manually associate Salesforce records with survey invitation records. Automated survey distribution processes also associate Salesforce records with survey invitation records. After the participant responds, the participant’s response record is also associated with the Salesforce record.

Surveys Features That Help Improve Response Rates
When designing your survey, you can use Salesforce Surveys features to enhance the participant experience and improve response rates.

Survey Invitation Emails Limit
The survey invitation emails you send to participants outside your Salesforce org count in your Salesforce org’s daily email limit.

Survey Invitation Settings
Use the survey invitation settings to control your surveys’ security.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Available for:</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anonymize responses</td>
<td>• Participants in your company</td>
<td>Participants can take the survey without revealing their name or other identifying information. A participant can submit their response multiple times.</td>
</tr>
<tr>
<td></td>
<td>• Participants outside your company</td>
<td></td>
</tr>
<tr>
<td>Let participants see their responses</td>
<td>Participants in your company</td>
<td>Participants with Salesforce accounts in your org can access their response record in Salesforce after completing the survey.</td>
</tr>
<tr>
<td>Don’t require authentication</td>
<td>Participants outside your company</td>
<td>Lets a participant who receives a link take the survey without authentication.</td>
</tr>
</tbody>
</table>

EDITIONS
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience
Available by default in: Enterprise, Performance, and Unlimited, Developer Editions
Available for: Setting logging into Salesforce or an Experience Cloud site.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Available for:</th>
<th>Description</th>
</tr>
</thead>
</table>
| Unique link   | • Participants in your company  
• Participants outside your company | Each participant receives a unique invitation link. The participant’s name is associated with the participant’s response record. They can respond to the unique invitation only one time. |

**Note:** Use only when you send an email invitation.

**Tip:** When sending invitations using Flow or Process builder, use this setting to create identified invitations that don’t require a login.

**EDITIONS**

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

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

---

**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.

**Email Opt Out**

If leads and contacts opt out of receiving emails, they don’t receive survey invitation emails from the Survey Builder or by an automated process.

---

**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.
Email Opt Out

If leads and contacts opt out of receiving emails, they don’t receive survey invitation emails from the Survey Builder or by an automated process.

Automated processes like Support Settings or Process Builder don’t generate a survey invitation for leads or contacts who opt out of receiving emails. Email invitations aren’t generated when you email survey invitations from the Survey Builder to leads and contact who opt out of receiving email.

SEE ALSO:
  - Opting Out of Email

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 inside or outside your company.
3. Select the settings for your survey invitation.
4. Copy the survey link, and send it to your participants.

Note: The invitation record isn’t associated with the participant’s record.

SEE ALSO:
  - Choose the Language in Which Participants Outside the Org View the Survey
Share QR Code Containing Survey Invitation

Download a QR code containing a survey invitation and share it with participants.

1. In the Survey Builder, select Send > Get Link.
2. Select whether you want to download the QR code for participants inside or outside your company.
3. Select the settings for your survey invitation.
4. Click Download QR Code.

Note: The survey invitation record contained by the QR code isn’t associated with the participant’s record.

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

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: Like or Dislike, Net Promoter Score (NPS), Rating, Score.

Send survey invitations to either individuals or a list of participants.

- Add email addresses of the recipients manually if there are fewer participants.
- Alternatively, send to a list if there’s a larger audience.

Send Survey Invitations to Individuals

When there are fewer participants to send the survey invitations to, add their email addresses manually. You can send an email invitation for a survey to an individual that is a lead, contact, or a member of your org. You can send an email invitation for questions of the following types: Like or Dislike, Net Promoter Score (NPS), Rating, Score.

Send Survey Invitations to a List of Participants

Target a large audience by sending survey invitations to a group of participants. 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: Like or Dislike, Net Promoter Score (NPS), Rating, Score.
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

Send Survey Invitations to Individuals

When there are fewer participants to send the survey invitations to, add their email addresses manually. You can send an email invitation for a survey to an individual that is a lead, contact, or a member of your org. You can send an email invitation for questions of the following types: Like or Dislike, Net Promoter Score (NPS), Rating, Score.

⚠️ Important: A survey invitation is sent using the send email Global Action. These actions are arranged in alphabetical order and an invitation is sent using the first send email global action. Ensure that the first email action contains the mandatory fields, such as From, To, Subject and HTML Body.

1. In the Survey Builder, select Send > Send Email.
2. Select a question or the survey link, and click Next.
3. Select Send to Individuals, and click Next.
4. 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.
5. Click Next.
6. Select the settings for your survey invitation on page 46, and click Send.
Send Survey Invitations to a List of Participants

Target a large audience by sending survey invitations to a group of participants. 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: Like or Dislike, Net Promoter Score (NPS), Rating, Score.

Important: A survey invitation is sent using the send email Global Action. These actions are arranged in alphabetical order and an invitation is sent using the first send email global action. Ensure that the first email action contains the mandatory fields, such as From, To, Subject and HTML Body.

1. In the Survey Builder, select Send > Send Email.
2. Select a question or the survey link, and click Next.
3. Select Send to a List and define the following fields
   a. Object
      Select an object.
   b. List View
      Select an associated list view for the selected object.
   c. Recipient
      Define a recipient path. For example, to send the survey invitation to the account owners, select the recipient path as: Account.Owner.Id
   d. Survey Subject
      If you want to define a survey subject, select a path that associates the survey invitation with a survey subject. For example, to associate the case contact with the survey invitation, select Case.Contact.Id
4. Click Next.
5. Compose the email.
   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.
   To allow participants to respond to surveys without authentication, enable the Don’t require authentication option in the Contact object and ensure that all contacts in the list view have an email address.
6. Click Next.
   Tip: To successfully send the survey invitations, select a list view with less than 3000 participants.
7. Select the settings for your survey invitation on page 46, and click Send.
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 cloning 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. Ensure that you select Survey Question as the related entity type when you create a template or clone an existing template. You can add up to 4000 characters in the body of the email templates.

**Important:** An email template can contain either a survey link or a survey question.

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

<table>
<thead>
<tr>
<th>Template</th>
<th>Use</th>
</tr>
</thead>
</table>
| Embed_a_Survey_Link     | Populates the invitation link to the survey using the (href): \[[[SURVEY_INVITATION_URL]] \]
| Embed_a_Survey_Question | Populates:                                                          |
|                         | • The question using the \{{{SurveyQuestion.QuestionName}}} merge field. |
|                         | • The question scale using the \{{{SurveyQuestion.QuestionHtmlContent}}} merge field. |

**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.

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link to a question</td>
<td>Add the merge fields in one of the following ways:</td>
</tr>
<tr>
<td></td>
<td>• Insert the merge fields Question Name and Question Html Content</td>
</tr>
</tbody>
</table>
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 action creates a separate SurveySubject record, which you can’t view. For example, if you’re 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. Or you can send the invitation to the contact, person account, or lead using a channel of your choice.

Add the hyperlink SURVEY_INVITATION_URL

Type the merge fields
{{{SurveyQuestion.QuestionName}}} and
{{{SurveyQuestion.QuestionHtmlContent}}}
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.

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

SEE ALSO:
Define the Default Settings

Send Survey Invitations Using Flows

Send survey invitations to leads, contacts, and your Salesforce users from flows. Send participants reminders to complete surveys. Identify and choose participants to send survey invites to based on whether they responded to a survey recently. To schedule survey invitations use a flow.

To create an action to send a survey, provide the name, recipients, and invitation link options in the flow. Select a survey subject if you configure merge fields and data mapper for a survey. Invitations can be unique and unauthenticated, and participants can record responses anonymously. For more information on creating an action to send survey invitations, see Flow Core Action: Send Surveys.

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.

SEE ALSO:
Define the Default Settings
Considerations for Invitations Sent for Cases

Review these considerations before you send survey invitations for cases.

- Ensure that a default Experience Cloud site 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 is associated with the following records:
    - Case record
    - Case owner record
- Selections align with your survey questions:
  - Choose the content of the email in the Default Settings of surveys.
  - If the email content isn't chosen in the Default Settings of surveys:
    - If the survey doesn't contain a question of the following types, the survey link is sent: 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.

SEE ALSO:
- Define the Default Settings

Share and Grant Access to Surveys

Collect feedback for your survey design by sharing survey drafts with your team. Publish and share survey results and analytics data with users. While sharing surveys, you can give access to individuals or groups.

1. Open the survey, and then click Sharing.
2. In the Share popup window, define the sharing options.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Select a user type, and then search for a user, group, or role and subordinates with whom you want to share the survey.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Search" /></td>
</tr>
<tr>
<td>Survey access</td>
<td>In Survey Access Level, select an access permission for the selected user, group, or role. If you need to remove access or update permission, click <strong>Edit</strong>.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Survey Access Level" /></td>
</tr>
<tr>
<td>Manage survey access</td>
<td>To remove access or to update the permission for a survey, click <strong>Edit</strong>.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Manage survey access" /></td>
</tr>
</tbody>
</table>

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

3. Click Save.
View the List of Survey Users and User Hierarchy

View the details of users who have access to a survey. You can also view various user access information such as type of user, reason for granting access, relationship, and user access level.

1. Open the survey.
2. Click Sharing Hierarchy.

You can view the list of users and their access level for the survey.

3. If you want to view the access details of the user, click View.

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can Respond Anonymously</td>
<td>Select if you don't want to store the participant's name.</td>
</tr>
<tr>
<td>Can See Their Response</td>
<td>Select if you want to allow the participants' to view their responses after they submit them.</td>
</tr>
<tr>
<td>Let Guest Respond</td>
<td>Select if your participants aren't members of your org.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the survey that you want to send invitations for.</td>
</tr>
<tr>
<td>Survey ID</td>
<td>Unique identifier of the survey you want to send invitations for.</td>
</tr>
</tbody>
</table>
### Field | Value
--- | ---
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 Experience Cloud site 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**

## Associate Records with Survey Invitations and Responses

You can manually associate Salesforce records with survey invitation records. Automated survey distribution processes also associate Salesforce records with survey invitation records. After the participant responds, the participant’s response record is also associated with the Salesforce record.

The SurveySubject object records contain information about Salesforce records that are associated with survey invitations and survey responses. Survey invitations and responses can be associated with records of objects supported by SurveySubject.

**Note:** SurveySubject records can’t be viewed in Lightning within your Salesforce org.

### Manually Associating Salesforce Records with Survey Invitations

You can associate Salesforce records with survey invitations while using the **Get Survey Invitation** on page 53 quick action on Contact, Person Account, or Lead records. While generating the invitation for the lead, contact, or a person account, the related record you select is automatically associated with the invitation.

### Automated Survey Distribution Processes That Associate Salesforce Records with Survey Invitations

The following automated survey distribution processes automatically associate Salesforce records with survey invitations when they are generated.

- Send surveys using the **Send Survey Invitation action on the Process Builder** on page 54
- Send surveys using **Support Settings and Case Auto-Response Rules** on page 54
- Gather post-chat feedback using **surveys** on page 64
You can add the Survey Invitations and Responses related list to object record pages to view invitations and responses associated with the record.

**SEE ALSO:**
Add the Survey Invitations and Responses Related List to Objects

## Surveys Features That Help Improve Response Rates

When designing your survey, you can use Salesforce Surveys features to enhance the participant experience and improve response rates.

<table>
<thead>
<tr>
<th>Participant Experience</th>
<th>Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personalize surveys for each participant</td>
<td>• Merge Fields on page 34  &lt;br&gt; • Insert response from previous question on page 26</td>
</tr>
<tr>
<td>Show the relevant survey pages and questions to each participant</td>
<td>• Page branching logic on page 28  &lt;br&gt; • Question display logic on page 27</td>
</tr>
<tr>
<td>Reduce the number of clicks for participants</td>
<td>• Auto-progress on page 25  &lt;br&gt; • Design a survey to let participants respond within the email on page 32</td>
</tr>
<tr>
<td>Provide survey context within the email invitation</td>
<td>Email survey invitation on page 49</td>
</tr>
<tr>
<td>Make surveys visually appealing</td>
<td>Insert images on page 26</td>
</tr>
</tbody>
</table>

### Survey Invitation Emails Limit

The survey invitation emails you send to participants outside your Salesforce org count in your Salesforce org’s daily email limit.

For more information on your email limits, see Mass Email Limitations. To increase email limits for your org, contact your Salesforce representative.

**SEE ALSO:**
Knowledge Article: Increase your daily Mass Email limit  <br> Knowledge Article: Increase the Daily Single Email Message limit for your organization
Add Ways to Distribute Surveys with Salesforce Feedback Management

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

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

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

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

Use Digital Engagement Channels to Distribute Surveys

Invite more participants and generate responses by sending survey invitations from WhatsApp and Facebook, or share the URL over an SMS.

Use Rules to Target Survey Participants

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

Embed a Survey in a Web Page or Chat

To gather feedback on a web page or post-chat by embedding a survey, you must add the website that hosts the survey as a trusted website.

Track Surveys Sent to Participants Across Their Lifecycle

Use Customer Lifecycle Maps to define stages in participants' lifecycles and associate survey questions with each stage. You can create multiple maps, each tracking the unique lifecycle of different types of participants.
Use Digital Engagement Channels to Distribute Surveys

Invite more participants and generate responses by sending survey invitations from WhatsApp and Facebook, or share the URL over an SMS.

1. From Setup, in the Quick Find box, enter Messaging Settings, and then select Messaging Settings.
2. Click Configure Survey for a messaging channel.
3. In the Survey Invitation Settings section, if needed, add a message that you want to send with the invitation, and then select a survey to send in the Survey field.

   ![Configure Survey](image)

   **Note:** Currently, the translation of the invitation message isn’t supported.

4. Save your changes.

The survey invitation associated with the Digital Engagement channel is triggered at the completion of a chat in the channel. The invitation is sent based on the type of user associated with the chat session, such as EndUserContact, Case.Contact, or Lead.Id. A subject is associated with the invitation when the messaging session uses any of these entities:

- Case
- Lead
- EndUserAccount
- Opportunity
- EndUserContact
- Case.Contact
- Messaging Session
Use Rules to Target Survey Participants

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

Survey invitation rules can be created with or without the customer engagement context. But to add a customer engagement context, you must create a Custom Metadata Type and define the required parameters of the engagement context. Then, enable the engagement context on page 31 in the survey. Next, create a survey invitation rule with the trigger conditions and map the engagement context, if necessary.

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

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Give a name to the rule.</td>
</tr>
<tr>
<td>API Name</td>
<td>The API name that is auto generated based on the rule name.</td>
</tr>
<tr>
<td>Description</td>
<td>Optional. Provide a brief description of the purpose of the rule.</td>
</tr>
<tr>
<td>Action</td>
<td>Select an action that results in the trigger of the survey to the participants.</td>
</tr>
<tr>
<td>Object</td>
<td>Select a SurveySubject object that you want to associate with the rule.</td>
</tr>
<tr>
<td>Record Type</td>
<td>Optional. Select the type of record that gets created or updated for the object. The field is enabled only when a type is associated with the object.</td>
</tr>
<tr>
<td>Field</td>
<td>Select a field associated with the SurveySubject object that you choose.</td>
</tr>
<tr>
<td>Value</td>
<td>Select a value associated with the selected field.</td>
</tr>
<tr>
<td>Survey</td>
<td>Select a survey that you want to send to the participants when the conditions are met.</td>
</tr>
<tr>
<td>Recipient</td>
<td>Choose a survey recipient.</td>
</tr>
<tr>
<td>Survey Invitation Engagement Context</td>
<td>Optional. If there’s an engagement context configured on page 31 for the survey, then you can select the parameters that you want to focus on with the survey.</td>
</tr>
</tbody>
</table>

EDITIONS

Available in: Lightning Experience

Available in: Developer, Enterprise, Performance, and Unlimited Editions with the Salesforce Feedback Management licenses

USER PERMISSIONS

To create survey invitation rules:
- Manage Flows

To generate survey invitations:
- Profile that allows the user to create and send surveys
- Part of the Experience Cloud site associated with the survey

To associate a record with a survey invitation:
- Read, Create, Edit, and Delete permissions on SurveySubject records
4. Click Preview Survey for a temporary execution of the survey.
5. Save your changes, and then click Activate.
   To update the rule, deactivate it.

Embed a Survey in a Web Page or Chat

To gather feedback on a web page or post-chat by embedding a survey, you must add the website that hosts the survey as a trusted website.

Note: You can only use active surveys to gather feedback.

Allow Surveys to Be Framed Within the Chat Window on Websites

Surveys are used to gather post-chat feedback from customers. To open a survey within the chat window on a website, the website URL must be trusted to allow framing of surveys within the website.

Embed a Survey in a Web Page

Embedding a survey in a web page allows visitors to your website to respond to the survey.

Gather Post-Chat Feedback

Use Salesforce Surveys to gather customer feedback at the end of a chat session. You can add a post-chat survey to a chat window that’s added to a community or a website. Customers provide feedback within the chat window.

Allow Surveys to Be Framed Within the Chat Window on Websites

Surveys are used to gather post-chat feedback from customers. To open a survey within the chat window on a website, the website URL must be trusted to allow framing of surveys within the website.

1. From Setup, enter Session Settings in the Quick Find box, then select Session Settings.
2. On the Trusted Domains for Inline Frames section, click Add Domain.
3. Enter the URL of your website and select Surveys as the IFrame Type.
4. Save your changes.
Embed a Survey in a Web Page

Embedding a survey in a web page allows visitors to your website to respond to the survey. To embed a survey in a web page, add the URL of the website that hosts the survey as a trusted website on page 63. Then generate a survey invitation, and add the following iframe tag in the html code of the web page:

```
<iframe src="embed_the_survey_invitation_url"></iframe>
```

**Example:**
```
<iframe src="https://samplesurveyinvitation.com/invitationID=testinvitation&surveyname=caseresolved&UUID=d817cb13-ec01-4987-a1b9-9bc76709f9d2"></iframe>
```

Gather Post-Chat Feedback

Use Salesforce Surveys to gather customer feedback at the end of a chat session. You can add a post-chat survey to a chat window that’s added to a community or a website. Customers provide feedback within the chat window.

You can use only active surveys to gather post-chat feedback.

To add a post-chat survey within a chat window on a website, add the website URL as a trusted website on page 63. Next, select the survey in the corresponding Embedded Service deployment.

To add a post-chat survey to a chat window on a community, select the survey in the corresponding Embedded Service deployment.

For more information on how to add a post-chat survey to an Embedded Service deployment, see Customize Post-Chat with Surveys.

An unauthenticated survey invitation is generated every time a customer decides to provide feedback. If the pre-chat form is configured to associate customer information with Salesforce records, the invitation record is also associated with the same Salesforce records.

**Tip:** To send post-chat surveys to users within your Salesforce org, the Embedded Service deployment can’t have a pre-chat form configured.

SEE ALSO:
- Embedded Chat
- Customize Post-Chat Surveys
Track Surveys Sent to Participants Across Their Lifecycle

Use Customer Lifecycle Maps to define stages in participants' lifecycles and associate survey questions with each stage. You can create multiple maps, each tracking the unique lifecycle of different types of participants.

Tip: Use the Send Survey Invitation on page 62 action in the Process Builder to automatically send survey invitations during each stage.

When creating a map, choose whether the map tracks the Net Promoter Score (NPS) or the satisfaction score. Depending on your selection, you can add questions of the type NPS or rating to the map's stages. You can use Customer Lifecycle Analytics to visualize these scores and derive actionable insights.

Note: Before you create a map, ensure that Customer Lifecycle Maps is enabled for your Salesforce org.

1. From Setup, in the Quick Find box, enter Survey, then select Survey, and then click Customer Lifecycle Maps.
2. Click New Map.
3. Provide this information about the map.
   • Name and API name
   • Description
   • Whether the map is used to track the NPS or customer satisfaction score.
4. Save your changes.
5. Click New Stage.
6. Provide this information about the stage.
   • Name and API name
   • Description
   • A survey and a question.
   • From the dropdown next to each question, you can create a trigger to send survey invitations or remove the question.
     - Create and associate a survey invitation rule on page 62 to trigger the survey, or delete the question.
     - Ensure that you've configured an email template in the default settings on page 31 for the survey.
   - To remove a question from the stage, click Remove Question.
   - To add another question, click Add Question.
7. Save your changes.

How Do Customer Lifecycle Maps Work?
Customer Lifecycle Maps help you track customer satisfaction (CSAT) scores and net promoter scores (NPS) provided by customers across different stages in the customers' lifecycle. After you set up a customer lifecycle map, use Einstein Customer Lifecycle Analytics to track and review the scores your customers provide.
How Do Customer Lifecycle Maps Work?

Customer Lifecycle Maps help you track customer satisfaction (CSAT) scores and net promoter scores (NPS) provided by customers across different stages in the customers’ lifecycle. After you set up a customer lifecycle map, use Einstein Customer Lifecycle Analytics to track and review the scores your customers provide.

Workflow

To set up a customer lifecycle map:

- Plan the customer lifecycle stages.
- Create one or more surveys that contain the questions that you want to send to customers at each stage.
- Create a customer lifecycle map, and specify whether you want to track CSAT or the NPS.
- Create stages within the customer lifecycle map.
- Associate the survey and the specific survey question that you want to send to customers at each stage.
- Use automated processes like the Process Builder to send out the survey at each stage.
- Track the scores provided by the customer using one of the following in-app dashboards of Einstein Customer Lifecycle Analytics:
  - Customer Satisfaction Lifecycle Map
  - Customer NPS Lifecycle Map

Example Customer Lifecycle Map

Let’s look at how a telecom company uses Customer Lifecycle Maps to track the NPS that its customers provide.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Question and When Is It Sent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>After a customer completes the onboarding process, they’re asked to provide a score that describes their experience.</td>
</tr>
<tr>
<td>Plan Selection / Customization</td>
<td>At the end of the onboarding, a score is requested on how likely the customer is to recommend the telecom company to a friend.</td>
</tr>
<tr>
<td>Purchase</td>
<td>A couple of days after the purchase, a score is requested on how likely the customer is to recommend the product to a friend.</td>
</tr>
<tr>
<td>Stage</td>
<td>Question and When Is It Sent</td>
</tr>
<tr>
<td>---------------</td>
<td>--------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Usage</td>
<td>A few months after the purchase, a score is requested on how likely the customer is to recommend the telecom company to a friend.</td>
</tr>
<tr>
<td>Renewal</td>
<td>After the customer renews the product, they’re asked to provide a score that describes their renewal experience.</td>
</tr>
</tbody>
</table>

**SEE ALSO:**

- Create and Share an App from the Customer Lifecycle Analytics Template
- In-App Dashboards

## 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.

**Note:** A survey response is created when an individual responds to one or more questions from a survey. An individual can be an authenticated user or unauthenticated guest user. Survey responses must be used between the beginning and ending dates of your subscription. Unused survey responses don’t roll over to the following month.

**View 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.

**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.

**Note:** The SurveyQuestionScores automatically update while the responses are registered. But the scores don’t update if there’s a change in the response after it’s registered, such as deleting a response. To view the updated responses, refer to the value in the SurveyQuestionResponse object.

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.

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

SEE ALSO:

Salesforce Files
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.

Create a Custom Report Type to View Associated Record Details

You can create a custom report to view information about records associated with survey invitations and responses. Survey invitation and responses are associated with objects using the Survey Subjects object. You can create a report type using any object supported by Survey Subjects.

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.

<table>
<thead>
<tr>
<th>Objects</th>
<th>Use Case</th>
</tr>
</thead>
<tbody>
<tr>
<td>SurveyQuestionResponses</td>
<td>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.</td>
</tr>
</tbody>
</table>
**Use Case Objects**

<table>
<thead>
<tr>
<th>Objects</th>
<th>Use Case</th>
</tr>
</thead>
<tbody>
<tr>
<td>SurveyQuestionScores</td>
<td>View individual and overall scores provided by participants for one or more questions.</td>
</tr>
<tr>
<td>Note: The SurveyQuestionScores automatically update while the responses are registered. But, the scores don’t update if there’s a change in the response after it’s registered, such as deleting a response. To view the updated responses, refer to the value in the SurveyQuestionResponse object.</td>
<td></td>
</tr>
<tr>
<td>SurveySubjects</td>
<td>View invitations and responses associated with other objects.</td>
</tr>
<tr>
<td>SurveyVersions</td>
<td>View the different versions of a survey and the responses associated with each version.</td>
</tr>
</tbody>
</table>

**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.

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.

**[other]**: The Survey Invitation: Name column displays the invitation name for which a response is recorded. If there are multiple invitations for a survey, the aggregate of the results is displayed as a single value in the column name.

Score

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

<table>
<thead>
<tr>
<th>Question Name</th>
<th>Question Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>How likely are you to recommend our service to a friend or colleague?</td>
<td>NPS</td>
</tr>
<tr>
<td>How would you rate our service?</td>
<td>Rating</td>
</tr>
<tr>
<td>How would you score our customer support agent's knowledge about your case?</td>
<td>Score</td>
</tr>
<tr>
<td>What overall score would you give our customer support process?</td>
<td>Slider</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Survey Invitation: Name</td>
<td>Name of the invitation for which response is recorded</td>
</tr>
<tr>
<td>Question Name</td>
<td>Name of the question for which response is recorded</td>
</tr>
<tr>
<td>Question Score Type</td>
<td>The field contains either I (individual) or O (overall), and they mean different things.</td>
</tr>
</tbody>
</table>
| Note: | - I – The individual scores that one or more participants select for a question  
- O – The aggregate for a question |
| Response Value | I – Score one or more participants select for a question |
| Response Count | I – Number of participants who select the same score  
O – Number of participants who respond to a question |
| Score | For rating, score, and slider question types:  
- I – Percentage of participants who select the same score for a question.  
- O – Average of all responses. |
| For NPS question type: | - I – Percentage of participants who select the same answer for a question.  
- O – Percentage of participants who select 9 or 10 minus the percentage of participants who select less than 7. |
| Question Skipped Count | 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.

<table>
<thead>
<tr>
<th>Question Name</th>
<th>Question Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why did you raise the customer support case?</td>
<td>Multi choice</td>
</tr>
<tr>
<td>How did our customer support agent contact you?</td>
<td>Picklist</td>
</tr>
</tbody>
</table>
**Question Name**

How many days did it take to resolve your case?

**Question Type**

Radio

---

**Field Name**

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)

- I – Each answer choice one or more participants select for a question
- O – The number of participants who respond to a question

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

Survey Question Choice: Name (4)

I – Answer choice one or more participants select for a question

Note: In this report, the multi choice question has three I rows because one participant selects two answer choices.

Response Count (5)

- I – Number of participants who select the same answer choice
- O – Number of participants who respond

Score (6)

- I – Percentage of participants who select the same answer choice for a question
- O – Number of participants who respond to a question

Question Skipped Count (7)

O – Number of participants who skip a question

---

**Ranking**

This invitation-level report contains a ranking type question.

**Question Name**

Rank what you liked about our customer support agent.

**Answer Choices**

- Product knowledge
- Resolution provided
- Technical accuracy
**Question Name** | **Answer Choices**
---|---
| | • Resolution time

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey Invitation: Name (1)</td>
<td>Name of the invitation for which response is recorded</td>
</tr>
<tr>
<td>Question Name (2)</td>
<td>Name of the question for which response is recorded</td>
</tr>
</tbody>
</table>
| Question Score Type (3) | • I – The rank that one or more participants select for each ranking item  
• O – The number of participants who respond to the question |
| Note: The field contains either I (individual) or O (overall), and they mean different things. |
| 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) | • I – Number of participants who select the same rank for a ranking item  
• O – Number of participants who respond to a question |
| Score (7) | • I – Percentage of participants who select the same rank for a ranking item  
• O – Average of the weights participants provide for a ranking item |
| Question Skipped Count (8) | O – Number of participants who skip a question |

**Date**
This invitation-level report contains a date type question.

<table>
<thead>
<tr>
<th>Question Name</th>
<th>Question Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>When did our customer support agent first contact you?</td>
<td>Date</td>
</tr>
</tbody>
</table>
**Field Name**

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)  
- I – Each date that one or more participants select in a question  
- O – The number of participants who respond to the question  

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

Date Response (4)  
I – Date selected in a question

Response Count (5)  
- I – Number of participants who select the same date for a question  
- O – Number of participants who respond to a question

Score (7)  
- I – Percentage of participants who select the same date for a question  
- O – Number of participants who respond to a question

Question Skipped Count (8)  
O – Number of participants who skip a question
Create a Custom Report Type to View Associated Record Details

You can create a custom report to view information about records associated with survey invitations and responses. Survey invitation and responses are associated with objects using the Survey Subjects object. You can create a report type using any object supported by Survey Subjects.

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 an object supported by Survey Subjects, and define the settings for your custom report type.
5. Click Next.
6. Relate the following objects with the primary object: Survey Subjects > Survey Responses > Survey Question Responses.
7. Save your changes.
   The report type contains information about the invitations, responses, and associated records. The question names must be added.
8. Click Edit Layout.
9. In the View field, select Survey Question Responses Fields, and click Add fields related via lookup.
   Tip: Use Survey Subjects lookup fields to add more information about participants, like email ID.
10. Click Question, and select Question Name.
11. Click OK
12. Save your changes.

Example: You can create a report type with Case as the primary object. You can use this report type to create reports that help you analyze the customer satisfaction score provided by contacts after their case is closed.

SEE ALSO:
SurveySubject

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.

SEE ALSO:
Customer Lifecycle Analytics Base App

Deploy Customer Lifecycle Analytics

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

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

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

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

3. Assign Customer Lifecycle Analytics User Permissions
   Enable users to view the Customer Lifecycle Analytics app by assigning the relevant permissions.

4. The Data Needed to Create the Customer Lifecycle Analytics App
   Your org’s data has to meet specific requirements before you can create an app from Customer Lifecycle Analytics template.

5. Set Field-Level Security to Enable Creation of the Customer Lifecycle Analytics App
   Before you create the Customer Lifecycle Analytics app, make sure that the Analytics Integration User has access to all the fields used in the app.

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

7. Create and Share an App from the Customer Lifecycle Analytics Template
   Create an app from the Customer Lifecycle Analytics template, and share it with users in your org.

8. Schedule the Dataflow for the App
   The app creation process includes a dataflow that imports the latest data to Analytics. Schedule the dataflow to be rerun every day to ensure that your app uses up-to-date data.

9. Understand Customer Lifecycle Analytics Limitations
   Customer Lifecycle Analytics gives you access to most of the Tableau CRM capabilities, but with limitations.

10. Embed Customer Lifecycle Analytics Dashboards in Lightning Pages
    Customer Lifecycle Analytics includes dashboards you can embed and access in Lightning Experience pages.
Enable Tableau CRM

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

**Note:** If you see the Launch Tableau CRM button, Tableau CRM 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 Tableau CRM.

Assign Customer Lifecycle Analytics Administrator Permissions

Enable admins 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 permission sets.
   - If you have the Customer Lifecycle Analytics license subscription, select both the Tableau CRM Plus Admin and Customer Experience Analytics Admin permission sets.
   - If you have the Salesforce Feedback Management license subscription, select CLA Analytics Base Admin permission set.
5. Click Add, then click Save.
6. Repeat Steps 2–5 for all the users who create and manage the Customer Lifecycle Analytics app.

Assign Customer Lifecycle Analytics User Permissions

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

1. From Setup, enter Users in the Quick Find box, and then select Users.
2. Click the name of a user who requires access to Customer Lifecycle Analytics.
3. Click Permission Set Assignments, and then click Edit Assignments.
4. Select permission sets.
   - If you have the Customer Lifecycle Analytics license subscription, select both the Tableau CRM Plus User and Customer Experience Analytics User permission sets.
   - If you have the Salesforce Feedback Management license subscription, select CLA Analytics Base User permission set.
5. Click Add, then click Save.
6. Repeat Steps 2–5 for all the users who create and manage the Customer Lifecycle Analytics app.
The Data Needed to Create the Customer Lifecycle Analytics App

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

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

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

While creating the app, if your org’s data doesn’t meet the minimum requirements, you see a message describing what to fix.

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

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

If users don’t have proper field-level security permissions when they run a dataflow, the dataflow can fail. Here’s how to set Salesforce field-level security to enable the Analytics Integration User to see all fields used in the app.

⚠️ **Important:** When the data flow fails, you receive an email with a result log of all possible errors. If there’s an error because a field is missing, deprecated, or isn’t available for an integration user, set the Salesforce field-level security.

1. From **Setup**, go to **Object Manager**.
2. In the **Quick Find** search box, enter the name of the object whose field-level security you want to edit.
3. Select the object, then select **Fields & Relationships**.
4. Select the field you want to edit, then select **Set Field-Level Security**.
5. Look for Analytics Cloud Integration User, select **Visible**, and click **Save**.
6. Repeat Steps 5 and 6 for all the fields you want to use.
7. Refresh your browser cache.

You can now create the Customer Lifecycle Analytics app.
Set Up Engagement Channel

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

1. Create a custom metadata type called Engagement Key.
   a. From Setup, in the Quick Find box, enter Custom Metadata Types, and then click Custom Metadata Types.
   b. Click New Custom Metadata Type.
   c. For Label, enter Engagement Key.
   d. For Plural Label, enter Engagement Keys.
   e. Save your changes.

2. Add a custom field called Engagement Channel.
   a. In the Custom Fields section of the Engagement Key page, click New.
   b. Select Picklist, then click Next.
   c. For Field Label, enter Engagement Channel.
   d. In the text box, enter the names of channels that your business supports. Enter each value in a new line.

   Note: If you want to use channel names dynamically from another object, leave the text box empty
   e. Click Next.
   f. Save your changes.

3. In the survey’s default settings, select Engagement Key as the engagement context custom metadata type.
   a. Open the latest version of the survey you want to configure.
   b. Click ...
   c. Select Default Settings.
   d. From the Content picklist, select the survey question.
   e. From the Email Templates picklist, select the email template.
   f. From the Engagement Context Custom Metadata Type picklist, select Engagement Channel.
   g. Save your changes and activate the survey.

4. Set up the Survey Invitation Engagement Context.
   a. From Setup, in the Quick Find box, enter Customer Lifecycle Maps, and then click Customer Lifecycle Maps.
   b. Go to the customer lifecycle map that contains the stage you want to associate the engagement context with.
   c. Select the stage and click Add Question.
   d. Select the survey and the question for the stage.
   e. Click , and then select Invitation Rules.

   Note: If Invitation Rules is disabled, refresh the page and try again.
f. In the **Configure a survey trigger** window, define the required settings on page 62 that determine when the survey is sent.

**g. Add the survey invitation engagement context.**
   a. For Context Type, select **Engagement Channel**.
   b. For Data Type, select **Picklist** to use a static value. Or select **Lookup** to use values from another object.
   c. For Context Value, select a channel.

h. Save and activate the trigger.

---

**Create and Share an App from the Customer Lifecycle Analytics Template**

Create an app from the Customer Lifecycle Analytics template, and share it with users in your org.

1. Navigate to **Analytics Studio**.
2. Click **Create**, then select **App**.
3. Select **Customer Lifecycle Analytics**, and then click **Continue**.
4. Take a quick look at the preview page, and click **Continue** to open the configuration wizard.
5. If you want to create an app or use settings from an existing app, make a selection, and click **Continue**.

---

6. Tableau CRM performs a compatibility check of your org’s data. If it uncovers any issues, you see error messages with instructions for how to address them. Fix the issues, and try app creation again. If it completes successfully, click **Looks good, next**.

7. The next page of the wizard asks you to make three selections.
   a. The first wizard question asks if you’d like to add the pre-configured Einstein Discovery story to the app. To get predictions about the likelihood of survey responses, select **Yes**.
      
      ✅ **Note:** This capability requires a Customer Experience Analytics Plus subscription. Confirm the subscription with your admin.

   b. Next, the wizard asks if you’d like to add customer lifecycle maps to the app. To add customer lifecycle map dashboards to your app, select **Yes**.

      ✅ **Note:** To add customer lifecycle maps to your app, you must have the Salesforce Feedback Management license.

   c. Next, select the objects associated with survey invitations you want to add to your app. Based on the objects you select, relevant datasets are automatically created in the app.

8. Click **Looks good, next**.

9. Name your app, and click **Create**.

---

View the status of the app creation on the next page. The process takes a few minutes. After it’s complete, refresh the page to see your app.

✅ **Note:** If you see an error saying the Analytics Integration User does not have access to selected fields, edit **Salesforce field-level security**.

Now that you created the app, share it with users in your organization. You can share it only with users assigned with Customer Experience Analytics Admin or Customer Experience Analytics User permission sets.
If you have a Customer Lifecycle Analytics Base subscription, you can share your app with users assigned with CLA Analytics Base Admin or CLA Analytics Base User permission sets.

- **Note:** By default, any user who can access the dataset can view all the records in it. To restrict user access, apply security predicates to datasets. For information on how to apply security predicates, see Security Predicates for Datasets.

1. Open your app if it’s not already open. If you navigated away from Tableau CRM Studio, go back to it, select All Items, find your app, and click it.

2. Click .

3. In the next screen, use the search field under Invite others: to find other users in your org.

4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.

5. Click Add, then click Save.

SEE ALSO:
- Compare Licenses and Supported Survey Capabilities
- Customer Lifecycle Analytics Base App
- How Do Customer Lifecycle Maps Work?

### 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.

### Understand Customer Lifecycle Analytics Limitations

Customer Lifecycle Analytics gives you access to most of the Tableau CRM capabilities, but with limitations.

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

<table>
<thead>
<tr>
<th>Capability</th>
<th>Customer Lifecycle Analytics</th>
<th>Customer Lifecycle Analytics Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data sources</td>
<td>Salesforce and external data</td>
<td>Salesforce data</td>
</tr>
<tr>
<td>Object support</td>
<td>Standard and custom objects</td>
<td>Standard objects</td>
</tr>
<tr>
<td>Data volume</td>
<td>10 billion rows</td>
<td>10 million rows</td>
</tr>
</tbody>
</table>
### Capability

<table>
<thead>
<tr>
<th>Capability</th>
<th>Customer Lifecycle Analytics</th>
<th>Customer Lifecycle Analytics Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customize existing dashboards?</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Create dashboards?</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Customize existing datasets?</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Create datasets?</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Create custom Tableau CRM apps?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Supports Einstein Discovery and Experience Cloud integration?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Supports bulk actions and APEX steps?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Supports Sales Cloud Einstein AI features?</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Supports Salesforce Inbox?</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Einstein Prediction Builder</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Einstein Discovery in Reports</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Tableau CRM Platform</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Fast Start Templates</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

### 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 Dashboards in Lightning Pages](https://help.salesforce.com) in Salesforce Help. Here are examples using dashboards from the Customer Lifecycle Analytics app.

**Example:** To embed a contact object’s feedback scorecard, use the following string in the Filter String box:

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

**Example:** To embed a contact object’s customer lifecycle dashboard, use the following string in the Filter String box:

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

### Configure Feedback Scorecards

Configure feedback scorecards before you use them.

---

**SEE ALSO:**

- [Customer Lifecycle Analytics Base App](#)

---

**EDITIONS**

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

Configure feedback scorecards before you use them.

Note: Before you configure feedback scorecards for an object, make sure that the object records are associated with survey invitations using SurveySubject.

1. Go to an existing Lightning Experience page, click Edit Page, and then click Edit Page.
2. From the list of components, select Tableau CRM Dashboard.
3. From the Dashboard dropdown, select the scorecard you want to embed on the page.
4. Click Filter String.
5. In the text box, enter the filter string with survey name, question name, and other filters you want to add. Use the following syntax to enter the filter string:

   ```json
   {"datasets": {"<dataset name>": [["fields": ["<field>", "filter": {"operator": "<operator value>", "values": ["<context>"]}]], "<Dataset name>": [["fields": ["<field>", "filter": {"operator": "<operator value>", "values": ["<Survey Name>"]}], ["fields": ["<field>", "filter": {"operator": "<operator value>", "values": ["<Question Name>"]}], ["fields": ["<field>", "filter": {"operator": "<operator value>", "values": ["<Question Name>"]}]})
   ```

6. Save your page.

Example: Here's an example filter string for configuring a Case feedback scorecard.

   ```json
   {"datasets": {"<Case dataset>": [{"fields": ["Id"], "filter": {"operator": "in", "values": ["$Id"]}], "<SurveyQuestionResponseWithDetails>": [{"fields": ["SurveyVersion.Survey.Name"], "filter": {"operator": "in", "values": ["<Survey Name>"]}], ["fields": ["Question.Name"], "filter": {"operator": "in", "values": ["<Question Name>"]}]})
   ```

See Also:
- Generate Individual Survey Invitations for Contacts, Person Accounts, and Leads
- Send Survey Invitations Using the Process Builder
- Send Surveys to Gather Feedback on Support Cases
- Gather Post-Chat Feedback

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 77.

The Customer Lifecycle Analytics app includes two types of dashboards:
- Dashboards accessed through the app in Tableau CRM Analytics Studio.
- Embedded dashboards that deliver insights from within the context of Salesforce objects you work with.

They’re designed to answer key questions about your business.
In-App Dashboards
You can access the in-app dashboards through the app in Tableau CRM Analytics Studio.

Embedded Dashboards
The Customer Lifecycle Analytics app includes dashboards and scorecards that you can embed in Lightning Experience pages. These dashboards provide detailed insights into your customer satisfaction and loyalty. Salesforce admins embed these dashboards in specific Salesforce pages.

In-App Dashboards
You can access the in-app dashboards through the app in Tableau CRM 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 Tableau CRM 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.

After 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 Lifecycle Map
Track your customer satisfaction and the performance of the engagement channels based on the Customer Satisfaction Rating (CSAT) throughout the lifecycle. Get answers to the following questions about the lifecycle from the dashboard’s two pages.

- **Overview**
  - Which stage of the lifecycle needs attention?
  - How many participants responded to the surveys?
  - What’s the distribution of participants?
  - What’s the average CSAT score?
  - How actively involved are my customers?
  - What’s the CSAT score for engagement channels across customer lifecycle stages?

- **Trends**
  - How did the CSAT score trend over time?
  - How satisfied are my customers?
  - What’s the change in CSAT Score for a selected period?
  - How did the CSAT score across stages trend over time?
  - How engaged are my customers over time?
  - What’s the trend of the engagement channel performance?

Customer Net Promoter Score (NPS) Lifecycle Map
Gain insight into your customer loyalty and monitor the performance of engagement channels based on the NPS throughout the lifecycle. Get answers to the following questions about the lifecycle from the dashboard’s two pages.
Overview

- Which stage of the lifecycle needs attention?
- How many participants responded to the surveys?
- What’s the distribution of participants?
- What’s the average NPS?
- How actively involved are my customers?
- What’s the NPS of engagement channels across customer lifecycle stages?

Trends

- How did the NPS trend over time?
- How satisfied are my customers?
- What’s the change in NPS for a selected period?
- How did the NPS across stages trend over time?
- How engaged are my customers over time?
- What’s the trend of the engagement channel performance across customer lifecycle stages?

Response Analysis

Gain insight into your customer experience based on their response to different questions. The dashboard shows a detailed analysis of response data for a survey, question type, or question.

- Which are the most and least selected answer choices?
- How did the answer choices trend over time?
- How did the rating or score change over time?
- What’s the distribution of the survey responses?
- What’s the comparison between survey responses?

Response Distribution

Get an overview of the response distribution across surveys and customer lifecycles. The dashboard’s charts answer 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?

Topic Analysis

Analyze trending topics and learn how different areas of your business are performing. Topics group survey data by common themes. When you filter data by a topic, all the survey data tagged with the topic appears on the dashboard. The dashboard answers the following questions.

- Which are the trending topics?
- What’s the distribution of topics based on geography and demographics?
Cross-Tabulation Analysis
Identify the correlation between survey responses. The dashboard answers the following questions.

- What’s the correlation between choice and rating responses?
- What’s the distribution of choice and rating responses?
- What’s the distribution of survey participants based on geography and demographics?

SEE ALSO:
How Do Customer Lifecycle Maps Work?

Embedded Dashboards
The Customer Lifecycle Analytics app includes dashboards and scorecards that you can embed in Lightning Experience pages. These dashboards provide detailed insights into your customer satisfaction and loyalty. Salesforce admins embed these dashboards in specific Salesforce pages.

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

Single Customer’s Net Promoter Score (NPS) Lifecycle
Analyze the customer lifecycle experience based on the NPS given by a customer.

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

Single Customer’s Customer Satisfaction Rating (CSAT) Lifecycle
Analyze the customer lifecycle experience based on the CSAT given by a customer.

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

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

- Which stage of the customer’s lifecycle can be improved?
- What’s the NPS for the lifecycle?
- How many customers responded to the survey?
- What’s the total customer base?
- How many responses did we get?
- What’s the NPS across engagement channels and stages of the lifecycle?

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

- What’s the average CSAT rating?
• How many responses did we get?
• Which stage of the customer’s lifecycle can be improved?
• What’s the CSAT rating across engagement channels and stages of the lifecycle?

**Embedded Scorecards**

• **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?
  – What’s the average of all ratings?

• **User Customer Satisfaction**
  – What’s the latest CSAT rating of the user?
  – What’s the average of all ratings?

• **Contact NPS**
  – What’s the latest NPS of the contact?
  – What’s the overall NPS?

• **Person Account NPS**
  – What’s the latest NPS of the person account?
  – What’s the overall NPS?

• **Account NPS**
  – What’s the latest NPS of the account?
  – What’s the overall NPS?

• **User NPS**
  – What’s the latest NPS of the user?
  – What’s the overall NPS?
Salesforce Surveys for Developers

Developers can take advantage of Salesforce Surveys developer resources to weave their magic.

- Send surveys invitations using Connect REST API
- Send survey invitations using Apex
- Translate surveys using REST APIs
- Know the Salesforce Surveys object model
- Survey standard objects
  - Survey
  - SurveyEmailBranding
  - SurveyEngagementContext
  - SurveyInvitation
  - SurveyQuestion
  - SurveyQuestionChoice
  - SurveyQuestionResponse
  - SurveyQuestionScore
  - SurveyResponse
  - SurveySubject
  - SurveyVersion
  - SurveyVersionAddlInfo

EDITIONS

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

Available by default in: Enterprise, Performance, and Unlimited, Developer Editions
Translate Your Surveys

Gather insight from your global audience by translating your surveys. You can translate surveys only in languages to which you are assigned as a translator in the Translation Workbench.

⚠️ Tip: If you want to copy translations from an already translated survey, make a copy of the already translated survey. The translations are automatically copied over to the new survey.

Ensure the following while translating a survey:

- If the survey contains merge fields of the type associated record, participant record, or org variable, the merge field must be copied into the translated question or welcome message. The merge field automatically resolves when participants open the translated survey.
- If the response to a previous question is added to a question, the translated version of the previous question appears within a merge field in the current question. The merge field that contains the previous question must be copied into the translated version of the current question. The merge field automatically resolves when participants view the current question.

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.

⚠️ Important: You can translate surveys only in languages to which you’re assigned as a translator. If you aren’t assigned to any language as a translator, Salesforce doesn’t show the Languages tab.

3. Next to the language, click Translate.

While translating, click 📷 to insert images.

⚠️ Note: Translate only the text provided by the survey creator and the values of the custom variables used in merge fields. We take care of the rest in the languages fully supported by Salesforce.

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

How Do Participants View Translated Surveys?
Participants inside and outside your Salesforce org can participate in a translated survey.

SEE ALSO:
- Allow Translators to Translate Surveys
- Supported Languages
- Surveys Translation REST API Resources
How Do Participants View Translated Surveys?

Participants inside and outside your Salesforce org can participate in a translated survey.

When a participant in 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 a survey is translated, including the language that the survey was created in.

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

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

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

Choose the Language in Which Participants Outside the Org View the Survey

When participants outside your Salesforce org open the survey invitation, they must choose a language in which to view the survey. You can personalize the survey invitation link to ensure that customers outside your org view the survey in a particular language.

Important: Ensure that the survey is translated in the language you want for participants outside your org.

1. Open the survey in the Survey Builder.
2. Generate the survey invitation link.
3. For participants outside your org who must view the survey in a particular language, add the language code at the end of the invitation in the following format: &guestUserLang='<language_code>'
4. Send the unique survey invitation link to the participants outside your org who must view the survey in the language defined in the invitation.

Example: Let’s customize a survey invitation for participants outside your org who must view the survey in French. The survey invitation that’s generated for all the participants outside your org is:
https://samplesurveyinvitation.com/invitationID=testinvitation&surveyname=caseresolved
For the invitation in French, add the following at the end of the invitation:
https://samplesurveyinvitation.com/invitationID=testinvitation&surveyname=caseresolved&guestUserLang='fr'
Here's how the survey invitation looks:

https://samplesurveyinvitation.com/invitationID=testinvitation&surveyname=caseresolved&guestUserLang='fr'

SEE ALSO:

Generate Survey Invitation Links

FAQs

These are common questions encountered when using Salesforce Surveys.

Can I Print a Survey from the Salesforce Classic UI?
The Printable View option in the Salesforce Classic UI isn’t supported for Survey Objects.

What Browsers and Devices Are Supported by Salesforce Surveys?
Salesforce Survey support is available on all supported browsers and devices for Lightning Experience.

Objects Supported Only in Salesforce Classic UI
See the surveys objects that are available only in the Salesforce Classic UI.

• SurveySubject
• SurveyEmailBranding
• SurveyEngagementContextParam
• SurveyVersionAddlInfo

Resources

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

Trailhead

Survey Basics (module)
Salesforce Surveys for Admins (module)
Einstein Customer Lifecycle Analytics (module)
Salesforce Surveys Feedback Management (module)

Learning Map

Feedback Management Learning Map
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