Salesforce Feedback Management Implementation Guide for Service Cloud

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Introduction

Alpine Group, headquartered in Atlanta, Georgia, is a consumer goods company that manufactures food products, beverages, and apparel for health-conscious consumers. Although the company was established 10 years back, it started making profits only this year. John, the company's CEO, wants to ensure an upward trend in sales from this year. He also wants to improve the experience of his customers and increase the customer base.

John feels that knowing the pulse of existing customers can help the company make its products bigger and better. He wants to identify product portfolios that can be expanded and products that need improvement. He wants to get feedback from customers to understand their requirements and issues, and to get their suggestions.

John consults Alpine Group's IT team to understand if there's a tool that suits their requirements. The IT team has been closely involved in implementing Salesforce's Consumer Goods solution for the company and is impressed with the solution's capabilities. So, it didn't take much time for Alpine Group to finalize Salesforce Feedback Management as the perfect solution for their needs.

Alpine Group buys the Salesforce Feedback Management - Growth license. With Feedback Management, Alpine Group's key employees can understand customer feedback as it evolves over time by engaging customers and users with relevant, personalized surveys. They can then incorporate survey data into your feedback management process. They're convinced that Customer Lifecycle Maps, a Salesforce Feedback Management - Growth license feature, can help them understand the pulse of the customer through every stage of the customer's engagement with the company.

John is confident that Salesforce Feedback Management can not only help them improve their customer experience but can also help in customer retention.

Roles and Responsibilities

John meets Alpine Group's key stakeholders to discuss the plan to implement this project. The IT team and customer support team work in close collaboration to send the surveys to the customers.

The stakeholders finalize these implementation tasks to complete this project.

- Divya, Alpine Group's Salesforce admin, sets up Salesforce Feedback Management for the company.
- Alpine Group's IT team creates surveys. They collaborate with the corporate communications team to brand the surveys.
- The IT team sends the surveys to the existing customers to understand how they feel about Alpine Group's products.
- A feedback survey is sent to customers having complaints about the products as soon as the cases associated with their complaints are closed.
- The IT team consolidates all survey response data and create reports and dashboards.
- The stakeholders analyze the reports and dashboards and come up with a plan of action.

Let's follow the stakeholders' journey and see how Salesforce Feedback Management changes the fortunes of Alpine Group.

Set Up Feedback Management

Divya, the Salesforce admin for Alpine Group, sets up Feedback Management for the company by completing these steps.

Verify Feedback Management Access

Divya, Alpine Group's Salesforce admin, verifies that all of Alpine Group's users have access to the Salesforce Feedback Management - Growth features.

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

User Permissions Needed	
To verify Feedback Management access:	Customize Application

To verify Alpine Group's users access to the Salesforce Feedback Management - Growth features, Divya performs these steps.

1. From Setup, in the Quick Find box, enter `Customer Lifecycle Maps`.
2. Customer Lifecycle Maps appears in the Surveys section.

   All of Alpine Group's users have access to the Salesforce Feedback Management - Growth features because Customer Lifecycle Map is available only with the Salesforce Feedback Management - Growth license.

Enable Surveys and Configure Settings

Divya enables Surveys so that her IT colleagues can create and send surveys. She also enables Customer Lifecycle Maps.

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

User Permissions Needed	
To enable surveys:	Customize Application

To enable Surveys and Customer Lifecycle Maps, Divya performs these steps.

1. From Setup, in the Quick Find box, enter `Survey`, and then select **Survey Settings**.
2. Enable Surveys.
3. To allow survey owners to manage and export survey responses, enable Survey Owners Can Manage Responses.
4. To track surveys that are sent across customers' lifecycle, enable Customer Lifecycle Maps.
5. To display the Surveys tab, select **Default On** as the Surveys tab settings.

   See Tab Settings.

After Divya enables Surveys, sample surveys with Customer Satisfaction and Net Promoter Score questions are available in Salesforce. These sample surveys serve as examples when the IT team creates surveys.

User and Object Permissions

Alpine Group's IT team members require certain user and object permissions to access the Salesforce Feedback Management features, and to create and send survey. External survey recipients need permissions to respond to surveys without logging in to Salesforce or an Experience Cloud site.

Alpine Group's Salesforce admin, Divya, assigns these permissions.She completes these steps to assign the required permissions.

- The user permissions for IT team members to access the Salesforce Feedback Management features.
- The object permissions for IT team members to create and send surveys.
- The object permissions to the external survey recipients to respond to surveys without logging in to Salesforce or an Experience Cloud site.

Provide Access to Salesforce Feedback Management

Alpine Group’s Salesforce users need certain permissions to access the Salesforce Feedback Management features. Several standard profiles included with Salesforce Feedback Management provide the required user permissions by default. However, Divya assigns the required user permissions to the profiles of Alpine Group’s Salesforce users because these profiles are custom profiles.

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

User Permissions Needed	
To edit system permissions:	Manage Profiles and Permission Sets
To view system permissions:	View Setup and Configuration

To assign the permissions required to access the Salesforce Feedback Management features, Divya performs these steps.

1. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.
2. Create a permission set with the label `Feedback Management Advanced Features`.
3. Click **System Permissions**, and then click **Edit**.
4. Select the **Salesforce Surveys Advanced Features** and **View Setup and Configuration** permissions.
5. Saves the changes.
6. Open the Feedback Management Advanced Features permission set.
7. Click **Manage Assignments**, and then click **Add Assignments**.
8. Select the Alpine Group’s IT team users that you want to assign the permission set to, and then click **Assign**.
9. Saves the changes.

Related information

Set Up and Maintain Your Salesforce Organization: Profiles
Set Up and Maintain Your Salesforce Organization: User Permissions

Assign Object Permissions to Create and Send Surveys

Alpine Group’s Salesforce users need certain object permissions to create and send surveys. Several standard profiles included with Salesforce Feedback Management provide the required object permissions by default. However, Divya assigns the required object permissions to the profiles of Alpine Group’s Salesforce users because these profiles are custom profiles.

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

User Permissions Needed	
To view object permissions:	View Setup and Configuration
To edit object permissions:	Manage Profiles and Permission Sets AND Customize Application

To assign the object permissions required to create and send surveys, Divya performs these steps.

1. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.
2. Select the profiles of Alpine Group's IT team members who create and send surveys.
3. Click **Edit**.
4. In the Standard Object Permissions section, searches for the objects in this table, and selects the corresponding permission checkboxes.

Object	Required Permissions
Surveys	Create, Read, Edit, and Delete These permissions let users translate surveys into other languages.
Survey Invitations	Create, Read, Edit, and Delete
Survey Responses	Create, Read, Edit, and Delete

5. Save the changes.

Related information

Set Up and Maintain Your Salesforce Organization: Object Permissions

Assign Object Permissions to External Survey Recipients

The Alpine Group is planning to send surveys to external users who can access Aura or Visualforce sites in Experience Cloud, such as contacts and leads. These external users require certain object permissions to respond to surveys without logging in to Salesforce or an Experience Cloud site. Several standard profiles included with Salesforce Feedback Management provide the required object permissions by default. However, Divya assigns the required object permissions to the profiles of external users because these profiles are custom profiles.

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

User Permissions Needed	
To view object permissions:	View Setup and Configuration
To edit object permissions:	Manage Profiles and Permission Sets AND Customize Application

To assign the required object permissions to the profiles of external users, Divya performs these steps.

1. From Setup, enter `Survey` in the Quick Find box, and then select **Survey Settings**.
2. Make a note of the Experience Cloud site that's selected as the default site to create public survey invitations.
3. Enter `Sites` in the Quick Find box, and then select **All Sites**.

4. Open Experience Builder for the default site.
5. In Experience Builder, click , and then select **General**.
6. Click the profile name in the Guest User Profile section.
7. Clicks **Edit**, and select these permissions in the Standard Object Permissions section.

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

8. Save the changes.

Related information

Set Up and Maintain Your Salesforce Organization: Object Permissions

Add the Survey Invitations and Responses Related List to Case Records

Customer support agents can view the survey invitations sent and the responses received for the cases that they handle in the case records. So, Divya, Alpine Group's Salesforce admin, adds the Survey Invitations and Responses related list to the case records.

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

User Permissions Needed	
To customize page layouts:	Customize Application
To customize related lists:	Customize Application

To add the Survey Invitations and Responses related list to case records, Divya performs these steps.

1. From Setup, in Object Manager, click **Case**.
2. Click **Page Layouts**, and then click **Case Page Layouts**.
3. In the Layout panel, click **Related Lists**.
4. Drag the **Survey Invitations and Responses** related list onto the page layout.
5. Clicks for the Survey Invitations and Responses related list.
6. On the Related List Properties dialog, add the following fields to display in the related list, in the same order.
   - Invitation Record
   - Invitation Status
   - Participant
   - Record Name
   - Response Record
   - Response Status
   - Related Survey
7. Click **OK**, and save the changes.

Survey invitations are added to the case records that trigger the invitation email.

Set Up Translation Workbench

The customers of Alpine Group are spread across multiple geographies and locales. So, the surveys must be translated for customers to understand the questions and respond effectively.

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

User Permissions Needed	
To enable and disable Translation Workbench:	Customize Application
To add or edit languages:	Manage Translation
To assign translators:	Manage Translation
To view object permissions:	View Setup and Configuration
To edit object permissions:	Manage Profiles and Permission Sets AND Customize Application

Divya enables Translation Workbench and then enables the languages for translation. She also adds all the IT team members as translators.

1. Enable Translation Workbench. See Enable or Disable Translation Workbench.
2. To allow users to translate surveys in end-user languages or platform-only languages, enable these languages for translation and assign translators for each language. See Add Translated Languages and Translators.
3. Give your users Read permission on the Surveys object.

Divya has set up Feedback Management for Alpine Group. The IT team now creates surveys.

Create Surveys

Lisa, an IT team member, creates standard surveys with a welcome message, the required questions, and a thank you message, and brands the surveys by completing the following steps.

Create a Standard Survey

Lisa, an IT team member, creates one survey for all existing customers and another survey for the customers who have contacted customer support with some issue.

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

User Permissions Needed	
To create standard surveys:	Salesforce Surveys Advanced Features

To create the surveys, Lisa performs these steps.

1. From the App Launcher, find and select **Surveys**.
2. Click **New**.
3. Enter `Alpine Group - Product Satisfaction` as the name of the survey for all the customers, and then select **Standard Survey**.

4. Click **Continue**, and then click **Save**.
5. Create another survey for customers who have contacted customer support with some issue with the name as Alpine Group - Feedback.

Add a Welcome Message

Lisa adds a message that appears as soon as the survey recipients open the survey.

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

User Permissions Needed	
To add a message for the Welcome page:	Salesforce Surveys Advanced Features

To add a message that appears as soon as the survey recipients open the survey, Lisa performs these steps.

1. Open the Alpine Group - Product Satisfaction survey and the Alpine Group - Feedback survey.
2. Add these welcome messages and save the surveys.

Survey	**Welcome Message**
Alpine Group - Product Satisfaction	Thank you for being Alpine Group's esteemed customers. You have been an invaluable part of our growth journey! We would love to improve your experience with our products. Please spare 10 minutes of your time to fill this survey.
Alpine Group - Feedback	Thank you for being Alpine Group's esteemed customers. We appreciate you contacting us for help! Hope our resolution brightened your day. We are committed to improve our product experience and will ensure that you don't encounter such issues again. Please spare 10 minutes of your time to fill this survey.

Lisa doesn't add any descriptions for the messages.

Add Survey Questions

Lisa adds questions to the Alpine Group - Product Satisfaction survey and the Alpine Group - Feedback survey to gather feedback about Alpine Group's products and understand customers' issues.

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

User Permissions Needed	
To add survey questions:	Salesforce Surveys Advanced Features

To add questions to the surveys, Lisa performs these steps.

1. Open the Alpine Group - Product Satisfaction survey and the Alpine Group - Feedback survey.
2. To add a question page, in the sidebar, click **Add Page**.

3. To add a question to the page, click **Add Question**.

   She adds these questions:

Survey	Survey Page	Question Type	Question
Alpine Group - Product Satisfaction	Page 1	Long Text	How has your experience been with our products?
		Picklist	Which of our products have you bought? • Food Products • Beverages • Apparel
	Page 2	Long Text	What do you like most about our food products, beverages, and apparel?
		Long Text	What can we do better with our food products, beverages, and apparel?
	Page 3	Long Text	Which line of business would you like Alpine Group to foray into and why?
Alpine Group - Feedback	Page 1	Long Text	How was your experience with our support executive who helped resolve your complaint?
	Page 2	Picklist	Would you like to share feedback about our products? • Yes • No

Survey	Survey Page	Question Type	Question
		Matrix	Rate each of our products. **Question Type**: Single Selection **Questions** • Food Products • Beverages • Apparel **Choices** • Very Poor • Poor • Neutral • Good • Very Good
	Page 3	Long Text	What's the reason for giving these ratings? • Food Products • Beverages • Apparel
		Long Text	Which line of business would you like Alpine Group to foray into and why?

4. To change the questions' properties, click .
   a) To indicate that all the responses are required, click **Required** for all the questions.
   b) To remove the description field from all the question, deselect **Description** for all the questions.

Related information

Salesforce Feedback Management: Survey Question Types

Add Thank You Messages

Lisa adds a message that the participants see when they finish the survey. She adds multiple messages and then creates a display logic that determines the message that the participants view.

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

User Permissions Needed	
To add messages for the Thank You page:	Salesforce Surveys Advanced Features

To add a message that the participants see when they finish the survey, Lisa performs these steps.

1. Open the Alpine Group - Product Satisfaction survey and Alpine Group - Feedback survey.
2. On the Thank You page, turn on Customize Page.
3. Using the rich text editor, enter the default thank you message.

Survey	**Thank You Message**
Alpine Group - Product Satisfaction	Thank you for spending time in sharing your feedback about our products! Your feedback is helpful in making our products bigger and better.
Alpine Group - Feedback	Thank you for shopping with us! You can always contact our customer service team to share your feedback.

   She doesn't add any descriptions for the messages.

4. To automatically send the participants to a web page after 5 seconds, select **Redirect** as the URL.
5. To add a button that the participants can use to go to a web page, select **Button** as the URL.
   Lisa adds these URL buttons.

Survey	**URLs**
Alpine Group - Product Satisfaction	• Label: Buy Alpine Group Products • URL: The company's website
Alpine Group - Feedback	Lisa adds these buttons. **a.** Button 1 • Label: Buy Alpine Group Products • URL: The company's website **b.** Button 2 • Label: Contact Alpine Group's Customer Service • URL: The company's support website

6. To enter this message that appears conditionally in the Alpine Group - Feedback survey, click **Add Custom Message**.

Field	**Value**
Message	Thank you for spending your time for sharing feedback about our products! Your feedback is helpful in making our products bigger and better.
URL button	• Label: Buy Alpine Group Products • URL: The company's website

7. To automatically send the participants to a web page after 5 seconds, select **Redirect** as the URL.

8. To add a button that the participants can use to go to a web page, select **Button** as the URL.

   Lisa adds these URL buttons.

Survey	**URLs**
Alpine Group - Product Satisfaction	• Label: Buy Alpine Group Products • URL: The company's website
Alpine Group - Feedback	Lisa adds these buttons. **a.** Button 1 • Label: Buy Alpine Group Products • URL: The company's website **b.** Button 2 • Label: Contact Alpine Group's Customer Service • URL: The company's support website

9. Define the conditions that determine the message that survey recipients see based on a response to a survey question or based on merge field criteria.
   a) Click **Display Logic** for a custom message.
   b) Select whether the custom message appears for any or all conditions that you define.
   c) For Logic Type, select **Response to Question** to show participants the message based on a previous response. Or, select a merge field variable to show a message based on merge field criteria.
   d) Select the question or merge field for the condition.
   e) Select an operator.
   f) Specify a response or field value that determines when the custom message appears.
   g) To define another condition, click **Add Condition**.

   Lisa adds this display logic condition.

Field	**Value**
Select Condition	All conditions are met
Logic Type	Response to Question
Question	Page 2: Would you like to share feedback about our products?
Operator	equals
Response	Yes

10. Save the logic and the survey.

Brand Your Surveys

Alpine Group's brand and style in surveys by including the company logo. She also changes the labels, the text color, and the color of the buttons.

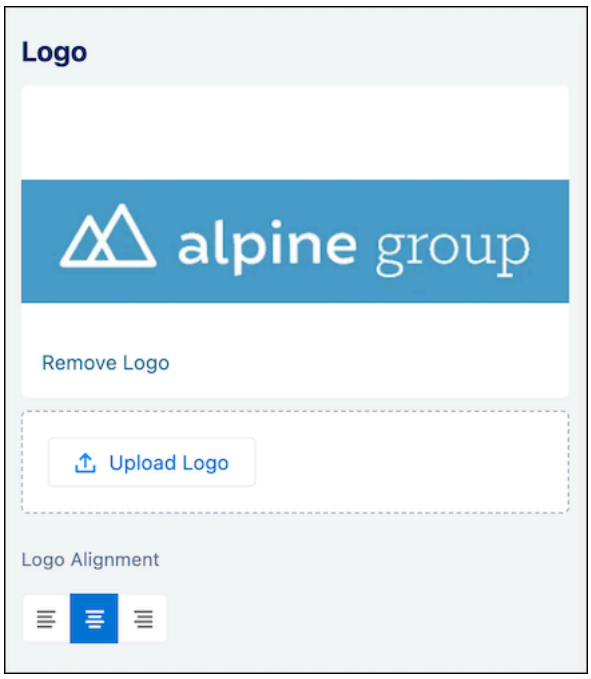
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To brand your surveys:	Salesforce Surveys Advanced Features

To brand and style the Alpine Group - Product Satisfaction survey, Lisa performs these steps.

1. Open the Alpine Group - Product Satisfaction survey.
2. Go to the Branding tab.
3. To add the company's logo to the survey, in the Background Image section, click **Upload Logo**.

   Lisa uploads Alpine Group's logo and center aligns it.



4. In the Button Labels section, enter custom labels for the Back, Next, Pause, and Finish buttons.
5. In the Question section, change the text color of the questions in the survey to Alpine Group's branding blue.
6. In the Start, Next, and Finish Buttons section and the Previous Buttons section, change the label color and the color of the Start, Next, Finish, and Previous buttons to Alpine Group's branding blue.

Personalization of Surveys

Lisa personalizes the experience of survey respondents by inserting field values from Salesforce records, including company details, and adding custom values in welcome messages, survey questions, and thank you messages. She customizes some survey questions by including the responses of participants to a previous question. She also enables Auto-Progress and adds display logic for a question in the Alpine Group - Feedback survey by completing these steps.

Personalize Surveys by Using Merge Fields

Lisa defines merge field variables and inserts them in welcome messages, survey questions, and thank you messages by completing these steps. Inserted merge fields insert field values from Salesforce records and company information.

Select the Access Level of Merge Fields

Lisa defines the access level of merge fields to allow survey recipients to view only the Salesforce data that she wants them to see. When a recipient opens a survey, it resolves the merge fields that the recipient has access to.

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

User Permissions Needed	
To define merge fields:	Salesforce Surveys Advanced Features

To define the access level of merge fields, Lisa performs the following steps.

1. Open the Alpine Group - Product Satisfaction survey and the Alpine Group - Feedback survey.
2. Click **Advanced Settings**, and then click **Merge Field Variables**.
3. In the Merge Field Access Level section, select the **System Context - Enforce record-level access** for both the surveys.

   The System Context - Enforce record-level access respects org-wide default settings, role hierarchies, sharing rules, manual sharing, teams, and territories. It doesn't respect the recipient's object permissions and field-level access set by profiles and permission sets.

System Context is shown in the Survey Builder header for both the surveys and helps Lisa easily identify the access level of merge fields.

Configure Merge Field Variables

Lisa configures merge field variables to insert the recipient's details and the company's name and contact.

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

User Permissions Needed	
To define merge fields:	Salesforce Surveys Advanced Features

Before configuring the merge field variables, Lisa makes sure that she has the Read permission to the associated objects and the participant objects.

To configure merge field variables that insert the recipient's details and the company's name and contact, Lisa performs these steps.

1. Open the Alpine Group - Product Satisfaction survey and the Alpine Group - Feedback survey.
2. Click **Advanced Settings**, and then click **Merge Field Variables**.
3. In the Object Variables for Merge Fields section, add these Associated Object and Participant Object variables:

Survey	**Variable Type**	**Name**	**Object**
Alpine Group - Product Satisfaction	Participant Object	Participant_Details	User
Alpine Group - Feedback	Associated Object	Case_Details	Case
	Participant Object	Participant_Details	User

4. In the Org and Custom Variables section, add these org variables:

Survey	Variable	Type	Value
Alpine Group - Product Satisfaction	Company_Name	Org	Name
Alpine Group - Feedback	Company_Name	Org	Name
	Company_Contact	Org	Phone

5. Save the variables and the surveys.

Insert Merge Fields

Lisa personalizes welcome messages, survey questions, and thank you messages for each participant by inserting merge fields.

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

User Permissions Needed	
To define merge fields:	Salesforce Surveys Advanced Features

To insert merge fields, Lisa performs these steps.

1. Open the Alpine Group - Product Satisfaction survey and the Alpine Group - Feedback survey.
2. Place the cursor where you want to insert the merge fields, and click **Insert Content**.
3. Select the type of the variable that you want to insert, and click **Next**.
4. Select these merge fields, and click **Insert**.

Survey	Inserted In	Inserted Merge Field Variable	Placement
Alpine Group - Product Satisfaction	Welcome message	Company_Name org variable	Replaces Alpine Group
		Participant_Details associated object variable	Adds the first name of the user at the beginning of the message
	Which line of business would you like Alpine Group to foray into and why? question on page 3	Company_Name org variable	Which line of business would you like {Company_Name} to foray into and why?
Alpine Group - Feedback	Welcome message	Company_Name org variable	Replaces Alpine Group
		Participant_Details associated object variable	Adds the first name of the user at the beginning of the message
	How was your experience with our support executive who helped resolve your complaint? question on page 1	Case_Details associated object variable	Adds the case number at the end of the question

Survey	Inserted In	Inserted Merge Field Variable	Placement
	Default thank you message	Company_Contact org variable	At the end of the message

5. Save the surveys.

Insert Previous Question Responses in Questions

Lisa customizes survey questions by including the responses of a participant to a previous question.

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

User Permissions Needed	
To customize survey questions:	Salesforce Surveys Advanced Features

To include the responses of a participant to a previous question, Lisa performs these steps.

1. Open the Alpine Group - Feedback survey and the Alpine Group - Product Satisfaction survey.
2. For the question in which you want to insert response to a previous question, click **Insert Content**, select **Response from a previous question**, and click **Next**.
3. Select these questions, and click **Insert**.

Survey	Inserted In	Response To	Response Placement
Alpine Group - Product Satisfaction	What do you like most about our food products, beverages, and apparel? question on page 2	Page 1 Question 2: Which of our products have you bought?	Replaces food products, beverages, and apparel with the items that the customer has bought
Alpine Group - Feedback	What's the reason for giving these ratings? question on page 3	Page 2 Question 2: Rate each of our products.	Adds the given ratings to the question

4. Save the surveys.

Customization of the Order of Survey Questions and Pages

Survey participants have one less click to make, as Lisa automatically sends them to the next page when they answer all the required questions on a page. She also configures the Alpine Group - Feedback survey to show the participants questions based on their responses to the previous questions on the same page.

Enable Auto-Progress to the Next Survey Page

Lisa enables Auto-Progress to speed participants through survey pages by automatically taking them to the next page when they answer all the required questions on the current page.

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

User Permissions Needed	
To enable auto progress:	Salesforce Surveys Advanced Features

To enable Auto-Progress, Lisa performs these steps.

1. Open the Alpine Group - Product Satisfaction survey and the Alpine Group - Feedback survey.
2. On the Branding tab, turn on Auto-Progress.

Show Questions Based on Previous Responses on the Page
Lisa adds a display logic in the Alpine Group - Feedback survey to show questions based on the responses to the previous questions on the same page.

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

User Permissions Needed	
To add display logic to a question:	Salesforce Surveys Advanced Features

To add a display logic, Lisa performs these steps.

1. Open the Alpine Group - Feedback survey.
2. For the Rate each of our products question on page 2, click **Display Logic**.
3. On the Question display logic window, select **All conditions are met**.
4. Define these conditions:

Field	**Value**
Question	Would you like to share feedback about our products?
Operator	equals
Response	Yes

5. Save the logic, and then save the survey.

Create or Update Records with Survey Responses

Lisa creates a data map for the Alpine Group - Feedback survey to automatically create case records containing the responses of participants.

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

User Permissions Needed	
To create data mapping:	Salesforce Surveys Advanced Features

To create a data map that automatically creates case records every time a customer gives a poor or a very poor rating for Alpine Group's products, Lisa performs these steps.

1. Open the Alpine Group - Feedback survey.
2. Click **Advanced Settings**, and then click **Survey Data Mapping**.
3. Click **New Mapping**.
4. Enter `Create Cases` as the mapping name.
5. Select **Create record**.
6. Select the **Case** target object.
7. Select the **Based on conditions** condition type and define these conditions:

Logic Type	**Question**	**Operator**	**Response**
Response to Question	Food Products: Rate each of our products.	equals	Poor
Response to Question	Food Products: Rate each of our products.	equals	Very Poor

Logic Type	Question	Operator	Response
Response to Question	Beverages: Rate each of our products.	equals	Poor
Response to Question	Beverages: Rate each of our products.	equals	Very Poor
Response to Question	Apparel: Rate each of our products.	equals	Poor
Response to Question	Apparel: Rate each of our products.	equals	Very Poor

8. Define these target object fields, information types, and values:

Field	Information Type	Value
Contact ID	Associated Record ID	Contact
Escalated	Boolean	True
Subject	String	Customer satisfaction score is poor or very poor
Description	Response to Question	What's the reason for giving these ratings?

9. Save the mapping and the survey.

A case is created every time a customer gives a poor or a very poor rating for Alpine Group's products. In the case records:

- The Contact ID field has the contact ID of the participants.
- The Escalated field is set to True.
- The Subject field has the value: Customer satisfaction score is poor or very poor.
- The Description field has the response to the What's the reason for giving these ratings? question.

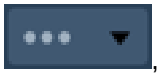
Define Default Settings

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

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

User Permissions Needed	
To define default survey settings:	Salesforce Surveys Advanced Features

To define the default settings, Lisa performs these steps.

1. Open the Alpine Group - Product Satisfaction survey and the Alpine Group - Feedback survey.
2. Click  , and then click **Default Settings**.
   Lisa doesn't configure any email settings and engagement context settings.
3. In the Language Settings section, select **English** as the language.
4. In the Invitation Settings section, select **Owner of records associated with the invitation**.
5. Save the survey.

Activate Surveys

Lisa activates the Alpine Group - Product Satisfaction survey and the Alpine Group - Feedback survey so that her team and the customer support team can send them to Alpine Group's customers.

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

User Permissions Needed	
To activate surveys:	Salesforce Surveys Advanced Features

To activate the surveys, Lisa performs these steps.

1. Open the Alpine Group - Product Satisfaction survey and the Alpine Group - Feedback survey.
2. Click **Activate**.

The surveys can be sent to Alpine Group's customers.

Translate Surveys

Alpine Group's customers are spread across multiple geographies and locales. So, Lisa translates the surveys into other languages to gather insights from global customers.

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

User Permissions Needed	
To translate surveys:	Salesforce Surveys Advanced Features

1. Open the record pages of the Alpine Group - Product Satisfaction survey and the Alpine Group - Feedback survey.
2. On the Languages tab, click **Translate** next to all available languages.
3. Enter the translations for the survey name, welcome message, survey questions, answer choices, thank you page messages, and URL button labels on the Thank You page.
4. Save the changes.
   The survey participants see the translated survey name, welcome message, survey questions, answer choices, thank you page messages, and URL button labels on the Thank You page.

Share Surveys with Your Team

Lisa wants to collect feedback on the survey from key stakeholders. So, she shares the surveys with them.

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

User Permissions Needed	
To share surveys:	Salesforce Surveys Advanced Features

To share the surveys with key stakeholders, Lisa performs these steps.

1. Open the record pages of the Alpine Group - Product Satisfaction survey and the Alpine Group - Feedback survey.
2. Click **Sharing**.
3. Select the **User** user type, and then select all the users whose feedback you want.

4. For the survey access level, select **Read Only** for both the surveys.
5. Save the changes.

Distribution of Surveys

Lisa now emails the Alpine Group - Product Satisfaction survey to all existing customers to get feedback about Alpine Group's products. Customers having complaints about the products receive the Alpine Group - Feedback survey as soon as the cases associated with their complaints are closed.

Lisa can send survey invitations through WhatsApp, Facebook, SMS, chat windows, or webpages, and can also share a QR code that contains a survey invitation link. See Distribute Surveys.

Email Survey Invitations to a Group of Customers

Lisa emails the Alpine Group - Product Satisfaction survey invitation link to all existing customers using a Contact list view.

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

User Permissions Needed	
To send survey invitation emails:	Salesforce Surveys Advanced Features

Lisa makes sure that the Contact list view has only active contacts having an email address. The survey invitation email isn't sent if any of the contacts is inactive.

To email the survey invitation to all existing customers, Lisa performs these steps.

1. Open the Alpine Group - Product Satisfaction survey.
2. Click **Send**, and then click **Send Email**.
3. Select **Survey link** as the content, and click **Next**.
4. Select **Send to a List**.
5. Define the list.
   a) Select **Contact** as the object that contains a list view of the survey participants.
   b) Select a list containing the active contacts of all existing Alpine Group customers.
   c) To identify the recipients, select. **Contact ID** as the field.
6. Click **Next**.
7. Customize the subject to `Help improve Alpine Group's products by taking this survey`.
8. Customize the email body to `We at Alpine Group strive to constantly improve our products. Help us provide the best experience by sharing your feedback in the survey.`, and then clicks **Next**.
9. In the Invitation Link Settings section, select **Unique link** and **Don't require authentication**, and then click **Send**.
   Salesforce sends the invitation by using the Email global action. By default, Salesforce sends the invitation from Lisa's user email address.

Use Flows to Send Survey Invitations

Divya uses Flow Builder to automatically email survey invitations to customers when customer support cases close.

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

User Permissions Needed	
To send survey invitation emails by using Flow Builder:	Salesforce Surveys Advanced Features

Divya makes sure that the contacts associated with the closed cases have an email address.

To automatically email survey invitations to customers when customer support cases close, Divya performs these steps.

1. From Setup, in the Quick Find box, enter `Flow`, and then select **Flows**.
2. Click **New Flow**.
3. Click **Record-Triggered Flow**, and then click **Create**.
4. Select the **Case** object.
5. Select the **A record is updated** trigger for the flow to run.
6. To determine the records that trigger the flow, define these conditions and click **Done**.

Condition Requirements	Field	Operator	Value
All Conditions Are Met (AND)	Status	Equals	Closed

7. Create a resource by specifying these values:

Resource Type	API Name	Data Type	Default Value
Variable	RecipientId	Text	{!$Record.Contact.Id}

8. Add an Action element to the flow.
9. In the left navigation panel, click the **Surveys** category, and then select the **Alpine Group - Feedback** survey in the Action field.
10. Enter `Send Alpine Group - Feedback Survey` as the label for the action.
11. Select the **Contact** type of recipient of the survey.
12. Select the **RecipientId** variable as the recipient.
13. For each participant to receive a unique survey invitation, select **Unique link**, and click **Done**.
14. Save and activate the flow.

Every time a customer support agent closes a case, an email with the Alpine Group - Feedback survey invitation link is sent to the customer who raised the complaint. These survey invitations are related to the case records that trigger the invitation email. Customer support agents can view the responses of a recipient by clicking a row in the related list row and clicking **View Responses**.

Related information

Automate Your Business Processes: Manage Record-Triggered Flows

Automate Your Business Processes: Add and Edit Flow Elements

Track Satisfaction Across a Customer's Lifecycle

Divya creates a customer lifecycle map to know how customers feel about Alpine Group and its products during the product purchase stage and the usage stage.

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

User Permissions Needed	
To create customer lifecycle maps:	Salesforce Surveys Advanced Features AND Customize Application

To create a customer lifecycle map, Divya performs these steps.

1. From Setup, in the Quick Find box, enter `Survey`, and then select **Customer Lifecycle Maps**.
2. Click **New Map**.
3. Enter `CSAT Customer Lifecycle Map` as the name of the map.
4. Enter `Customer Lifecycle Map to track the satisfaction of Alpine Group's customers.` as the description, select **CSAT** as the customer satisfaction metric, and then click **Save**.
5. Click **New Stage**.
6. Enter `Product Purchase` as the name of the stage.
7. Select the **Alpine Group - Product Satisfaction** survey, select the **Rate the likelihood of you recommending our products that you purchased to a friend.** question to be included in the stage, and then click **Save**.
8. Click **New Stage**.
9. Enter `Product Usage` as the name of the stage.
10. Select the **Alpine Group - Feedback** survey, select the **Rate the likelihood of recommending our company to a friend.** question to be included in the stage, and then click **Save**.
11. Uses Flow Builder to automatically send survey invitations during each stage.

    See Send Survey Invitations with Flows.

Analysis of Survey Responses and Sentiment Insights

Lisa had emailed the Alpine Group - Product Satisfaction survey to existing customers to know how they feel about Alpine Group's products. The Alpine Group - Feedback survey was sent to the customers having complaints about the products as soon as the cases associated with their complaints were closed. Customers have responded to these surveys. Lisa gains insights into the responses of customers from the Analyze tab in Survey Builder. She gains insights into the sentiments behind the responses to the text-based survey questions by performing these steps.

Survey Responses

Lisa views the completion metrics and responses of the Alpine Group - Product Satisfaction survey on the Analyze tab in the survey. The Analyze tab shows survey responses in easy-to-read charts for each type of question.

Create a Custom Report Type for Survey Responses

Lisa doesn't find the information that she's looking for on the Analyze tab in the Alpine Group - Feedback survey. So, she asks Divya to create a custom report type for the responses to the Alpine Group - Feedback survey.

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

User Permissions Needed		
To create and update custom report types:	**Legacy Folder Sharing**	Create and Customize Reports AND Manage Custom Report Types
	Enhanced Folder Sharing	Create and Customize Reports AND Manage Custom Report Types

To create a custom report type, Divya performs these steps.

1. Enter `Report Types` in the Quick Find box, and then select **Report Types**.
   The Custom Report Type welcome page opens.
2. Click **Continue**.
3. Click **New Custom Report Type**.
4. Select the **Survey Response** primary object.
5. Enter the label as `Alpine Group - Feedback Survey Responses`.
6. Enter `Report on responses to the Alpine Group - Feedback survey.` as the description.
7. Select **Customer Support Requests** as the category that she wants to store the custom report type in.
8. Select the **Deployed** deployment status.
9. Click **Next**, and then click **Save**.

Create Reports for Survey Responses

Lisa creates a report for the Alpine Group - Feedback survey's responses.

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

User Permissions Needed		
To create, edit, and delete reports:	**Legacy Folder Sharing**	Create and Customize Reports AND Report Builder
	Enhanced Folder Sharing	Create and Customize Reports AND Report Builder

To create a report, Lisa performs these steps.

1. On the Reports tab, click **New Report**.

2. Select the **Alpine Group - Feedback Survey Responses** report type, and click **Start Report**.
3. Add Survey: Name equals to Alpine Group - Feedback as a filter condition, and then click **Save & Run**.

Create Survey Data Maps to Get Sentiment Insights

Lisa creates a data map that's used to get insights about the sentiment of the responses to the Alpine Group - Feedback survey.

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

User Permissions Needed	
To create data mapping:	Salesforce Surveys Advanced Features

To create a data map that's used to get sentiment insights, Lisa performs these steps.

1. Open the Alpine Group - Feedback survey.
2. In the Survey Builder, click **Advanced Settings**, and then select **Survey Data Mapping**.
3. Clicks **New Mapping**.
4. Names the mapping as `Create AI Sentiment Results`.
5. Select **Create record**.
6. Select the **AI Sentiment Result** target object.
7. Select the **Every time** condition type.
8. Specify values for the predefined AI Sentiment Result fields.
   a) For the Name field, select the **Associated Record ID** information type and the **Contact** value.
   The Contact ID becomes the name for the AI Sentiment Result record.
   b) Select the **Amazon Comprehend DetectSentiment** service type.
   c) Select the **Response Value** source text field.
   The value in the Source Text Field is analyzed for its sentiment. Selecting Response Value ensures that the responses of participants to text questions are analyzed.
   d) For Source Text Language, select the **Response Fields** information type and the **Language** value.
   The language of the related survey responses is considered as the source text language.
9. Specify the text question, the response to which you want to analyze the sentiment of.
   a) Click **Add Row**.
   b) For Target Object Field, select **Source Object ID**.
   c) Select the **Response to Question** information type and the **What's the reason for giving these ratings?** value.
10. Specify the field and the value for the AI Sentiment Result record's status.
   a) Clicks **Add Row**.
   b) For Target Object Field, select **Status**.
   c) To process survey responses in real time, select the **Submitted** value.
11. Save the mapping and the survey.

Use a Flow Action to Get Sentiment Insights

Divya uses the Perform Survey Sentiment Analysis action in Flows to trigger the Amazon Comprehend API. The Amazon Comprehend API uses the Create AI Sentiment Results data map to process survey responses, and creates AI Sentiment Result records with insights about the sentiment of the responses.

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

User Permissions Needed	
To open, edit, or create a flow in Flow Builder:	Manage Flow
To run a flow:	Run Flows

To use the Perform Survey Sentiment Analysis action in Flows to trigger the Amazon Comprehend API, Divya performs these steps.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.
2. Click **New Flow**.
3. Select the **Record-Triggered Flow** flow type, and then clicks **Create**.
4. Select the **Survey Response** object and the **A record is created** trigger for the flow, and then clicks **Done**.
5. To get all survey versions of the Alpine Group - Feedback survey, add a Get Records element.
6. To get the ID of the What's the reason for giving these ratings? question in the Alpine Group - Feedback survey, add another Get Records element.
7. Add an Action element.
   a) In the Category section, select **Surveys**.
   b) Select the **Perform Survey Sentiment Analysis** action.
   c) Enter `Get Sentiment Insights` as the label for the action.
   d) Specify these input values, and clicks **Done**.

Field	Value
End Date	31 March 2023
Operation	Create records
Question IDs	Question ID variable from the Get Survey Question IDs element
Start Date	01 January 2023
Survey ID	Survey ID variable from the Get Survey IDs element

8. Save the changes, and then activate the flow.

Customer Lifecycle Analytics Dashboards

Divya deploys Customer Lifecycle Analytics. Lisa looks at the Customer Lifecycle Analytics dashboards to get actionable insights based on data from customer lifecycle maps, survey responses of customers, and sentiment insights.

Available for an additional cost in: **Enterprise**, **Unlimited**, and **Developer** Editions

See Deploy and Use Customer Lifecycle Analytics.

Conclusion

Alpine Group's IT team presents the reports, dashboards, and snippets of the survey responses to John. They inform him that they will receive regular feedback about customer satisfaction. John is impressed that Salesforce Feedback Management has helped his company get all the actionable data that they require to

improve Alpine Group’s customer experience and retention. His team of market strategists synthesizes all the data points and creates a clear plan of action.

Resources

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

Category	**Category**
Help documentation	Salesforce Feedback Management
Trailhead Modules	Survey Basics
	Salesforce Surveys for Admins
	CRM Analytics Customer Lifecycle Analytics
	Design and Distribute Surveys with Salesforce Feedback Management
Developer Resources	Surveys REST Connect API Resources
	Survey Connect API Class
	Salesforce Surveys Translation REST API Resources
	Salesforce Surveys Object Model