

CSAT Salesforce User Guide

Survey setup, configuration, testing, and results management

Purpose

This guide consolidates the existing CSAT Survey Setup Guide into a complete, user-oriented reference for configuring surveys in Salesforce, testing the setup, and reviewing survey responses and summary results.

Document scope

The source material specifically documents Survey Templates, Question Bank entries, Survey Config records, reminder emails, survey results, and pre-production testing. Sections below that describe navigation or operational practices are framed as guidance and should be aligned with the actual Salesforce org before publication.

1. CSAT Application Overview

The CSAT survey setup consists of three Salesforce records created in sequence:

Record	Purpose
Survey Template	Defines survey send timing, reminders, and the survey heading.
Question Bank	Stores individual questions and links each question to a Survey Template.
Survey Config	Determines which object and trigger event fires the survey, using the Survey Template.

The documented supported Object Type values are Opportunity, Case, and Campaign.

End-to-End Survey Flow

Configure Survey Template → Add Question Bank entries → Configure Survey Config → Test → Survey is triggered → Customer responds → Review Overview/Summary results.

Important setup rule

Create the three records in the documented order. A Question Bank entry only appears on a survey when it is linked to a Survey Template, and Survey Config must reference the same Survey Template.

2. Accessing and Navigating the Salesforce App

The supplied source document does not specify the Salesforce login URL, app launcher path, tab names, profiles, permission sets, or home-page layout. These details should therefore be customized for your Salesforce org rather than assumed.

Recommended navigation section to complete

- Open Salesforce and sign in with your organization credentials.
- Open the CSAT application from the Salesforce App Launcher or the navigation method configured in your org.
- Confirm that the user has access to Survey Templates, Question Bank, Survey Config, survey records, and reporting components as applicable.
- Use the navigation tabs available in your org to locate the records described in this guide.

Admin note: Add a screenshot of the actual CSAT app navigation here, with numbered callouts for each tab. This information is not contained in the source PDF.

3. Survey Template

Purpose

A Survey Template defines the survey's send timing, reminder behavior, and heading.

Create a Survey Template

Field	Required	What to enter
Survey Template Name	Yes	Clear, identifiable name, such as by client or purpose.
Days to Send Survey	Yes	Number of days after the trigger event before the survey is sent.
Max Reminders	Yes	Number of reminder emails to send if there is no response.
Reminder Interval Days	Yes	Number of days between reminders.
Is Active	No	Select this so the template can be used.
Survey Type Code	No	Optional code used to categorize the survey type.
Survey Heading	Yes	Heading displayed at the top of the survey form.

Click Save after completing the required fields. The Survey Heading is fixed text shown on the survey form and is separate from individual Question Bank questions.

The screenshot shows a web application interface for managing survey templates. At the top, there is a navigation bar with a logo and the text 'Automated CSAT A...'. Below this, there are tabs: 'Home', 'Survey Templates' (which is active), 'Question Banks', and 'Survey Config'. The main content area is titled 'Survey Template' and 'Opportunity when Closed won Mixed Question'. It features a tabbed interface with 'Details' selected, showing various configuration fields. The fields are organized into two columns. The left column includes: 'Survey Template Name' (Opportunity when Closed won Mixed Question), 'Days to Send Survey' (0), 'Max Reminders' (3), 'Reminder Interval Days' (1), 'Is Active' (checked), 'Survey Type Code' (OppClosedwon), and 'Survey Heading' (How We Can Improve Our Performance?). The right column includes: 'Owner' (Ankit Agarwal) and 'Last Modified By' (Ankit Agarwal). At the bottom, it shows 'Created By' (Ankit Agarwal, 31/08/2026, 11:00 am) and 'Last Modified By' (Ankit Agarwal, 31/08/2026, 11:22 am).

Survey Template Name	Opportunity when Closed won Mixed Question	Owner	Ankit Agarwal
Days to Send Survey	0		
Max Reminders	3		
Reminder Interval Days	1		
Is Active	✓		
Survey Type Code	OppClosedwon		
Survey Heading	How We Can Improve Our Performance?		
Created By	Ankit Agarwal, 31/08/2026, 11:00 am	Last Modified By	Ankit Agarwal, 31/08/2026, 11:22 am

Survey Template — Details tab showing configured fields

4. Reminder Email Configuration

After a Survey Template is saved, the record page displays reminder email slots based on Max Reminders. Slot 0 is the Initial Send; Slots 1+ represent Reminder 1, Reminder 2, and so on.

- If Max Reminders is 0, only the Initial Send email is sent.

- Each slot displays a default email template.
- If no template is explicitly selected, the documented default hardcoded email is sent.
- Use Manage Templates to go to Email Templates and create a custom email.
- Use Edit Template or Change Email Templates... to assign or change the template for a slot.
- Changing Max Reminders after the template is saved adjusts the number of reminder slots shown.

5. Question Bank

Purpose

Question Bank records contain the questions displayed to survey respondents. Each question should be linked to the appropriate Survey Template.

Field	Required	What to enter
Question Summary	Yes	Short internal label.
Question Text	Yes	Actual question displayed to the respondent.
Is Active	No	Select when the question should be usable.
Survey Template	No*	Select the Survey Template created in Step 1.
Answer Type	Yes	Scale 1-5, Scale 1-10, Radio, Rating (star), or TextArea.
Radio Options	Conditional	For Radio: move at least 2 values from Available to Chosen.
Answer Type Display	Auto	Calculated automatically on save; leave blank.
Sort Order	No	Whole number from 1 to 20 controlling question order.

*Although Survey Template is not marked required on the form, the source states that a question only appears on a survey once linked to a template. Sort Order is validated as a whole number from 1 to 20, allowing a maximum of 20 questions linked to one Survey Template.

Answer Types

Answer Type	How it behaves
Scale 1–5	Numeric scale; Summary shows the average across responses.
Scale 1–10	Numeric scale; Summary shows the average across responses.
Rating (star)	Star rating; Summary shows the average across responses.
Radio	Selectable options; Summary shows a response breakdown by chosen option.
TextArea	Free-text response; Summary shows individual text answers.

The available answer types and their documented Summary behavior are defined in the source guide.

Radio Options

When Answer Type is Radio, the Radio Options section displays Available and Chosen boxes. Move at least two values into Chosen. The Chosen values are displayed to respondents and are also used by the Summary tab to break down responses.

The screenshot shows the 'Question Bank' interface with the 'Details' tab selected. The question being configured is 'How easy is the app to use?'. The configuration details are as follows:

- Question Summary:** How easy is the app to use?
- Question Text:** How easy and convenient was it for you to use the app, including navigating through different screens, finding the information or features you needed, understanding the available options, completing your tasks, and interacting with the overall user interf
- Is Active:** ☒
- Survey Template:** Opportunity when Closed won Mixed Question
- Answer Type:** Scale 1-5
- Answer Type Display:** 1 2 3 4 5 — Scale (with corresponding colored radio buttons)
- Sort Order:** 4
- Owner:** Ankit Agarwal

Below the configuration details is a section for 'System Information'.

Question Bank — Details tab showing question configuration

6. Survey Config

Purpose

Survey Config determines the Salesforce object and trigger event that fire the survey and identifies the Survey Template to use.

Field	Required	What to enter
Survey Config Name	Auto	Auto-generated; no entry required.
Object Type	Yes	Opportunity, Case, or Campaign.
Trigger Event	Yes	Event that fires the survey send, such as a status change.
Survey Template	Yes	Select the same Survey Template created in Step 1.
Is Active	No	Select to turn the configuration on.

Click Save. Object Type and Trigger Event cannot be left as --None-- when saving the configuration.

Automated CSAT A... Home Survey Templates Question Banks Survey Config

Information

Survey Config Name
Auto Generated

Owner
Ankit Agarwal

* Object Type
Campaign

* Trigger Event
Start Date

* Survey Template
Opportunity when Closed won Mixed Question

Is Active
☒

Cancel Save & New Save

Survey Config — Object Type, Trigger Event, and linked Survey Template

6.1 Preview the Survey Form

From the Survey Template record, click Preview Survey Form (highlighted below) to see exactly how the form will appear to the customer before it goes live.

Automated CSAT A... Home Survey Templates Question Banks Survey Config

Survey Template
Opportunity when Closed won Mixed Question

Related Details Overview Summary

Survey Template Name
Opportunity when Closed won Mixed Question

Days to Send Survey
0

Max Reminders
3

Reminder Interval Days
1

Is Active
☒

Survey Type Code
OppClosedwon

Survey Heading
How We Can Improve Our Performance?

Created By
Ankit Agarwal 31/08/2026, 11:00 am

Owner
Ankit Agarwal

Last Modified By
Ankit Agarwal 31/08/2026, 11:22 am

Activity

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Survey Reminder Email... Manage Templates Preview Survey Form

Opportunity when Closed won Mixed Question Max Reminders: 3

Search and select an Email Template for each reminder below. The Start Survey button will be automatically added to every email sent.
Slot 0 Initial Send email. Slots 1+ Reminder emails. If no template is selected for a slot, a default hardcoded email will be sent.

INITIAL SEND (REMINDER 0)
Install Survey Email(Default) Edit Template

Survey Template record — click Preview Survey Form

SURVEY FORM PREVIEW
How We Can Improve Our Performance?

Desktop Mobile Showing how the form looks when the recipient clicks the survey link.

How We Can Improve Our Performance?

PLEASE ANSWER EACH QUESTION BELOW

How would you rate the usefulness of the app in your daily activities?

☐ Excellent
☐ Good
☐ Average
☐ Poor
☐ Very Poor

How would you rate your overall experience with the app, considering its features, ease of use, design, performance, navigation, and how well it met your expectations?

★ ★ ★ ★ ★
Click a star to rate (1 = Poor, 5 = Excellent)

How likely are you to recommend this app to your friends, family, colleagues, or others based on your overall experience?

Preview only — no responses are recorded

Close Preview

Survey Form Preview — shows exactly how the form will look to the customer (preview only, no responses are recorded)

6.2 Manage Email Templates

Click Manage Templates (highlighted below) to be redirected to the Email Templates page in Setup.

Automated CSAT A... Home Survey Templates Question Banks Survey Config

Survey Template
Opportunity when Closed won Mixed Question

Related Details Overview Summary

Survey Template Name: Opportunity when Closed won Mixed Question
Days to Send Survey: 0
Max Reminders: 3
Reminder Interval Days: 1
Is Active: ☒
Survey Type Code: OppClosedwon
Survey Heading: How We Can Improve Our Performance?
Created By: Ankit Agarwal
Last Modified By: Ankit Agarwal

Owner: Ankit Agarwal

Last Modified: 31/08/2026, 11:22 am

Activity

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

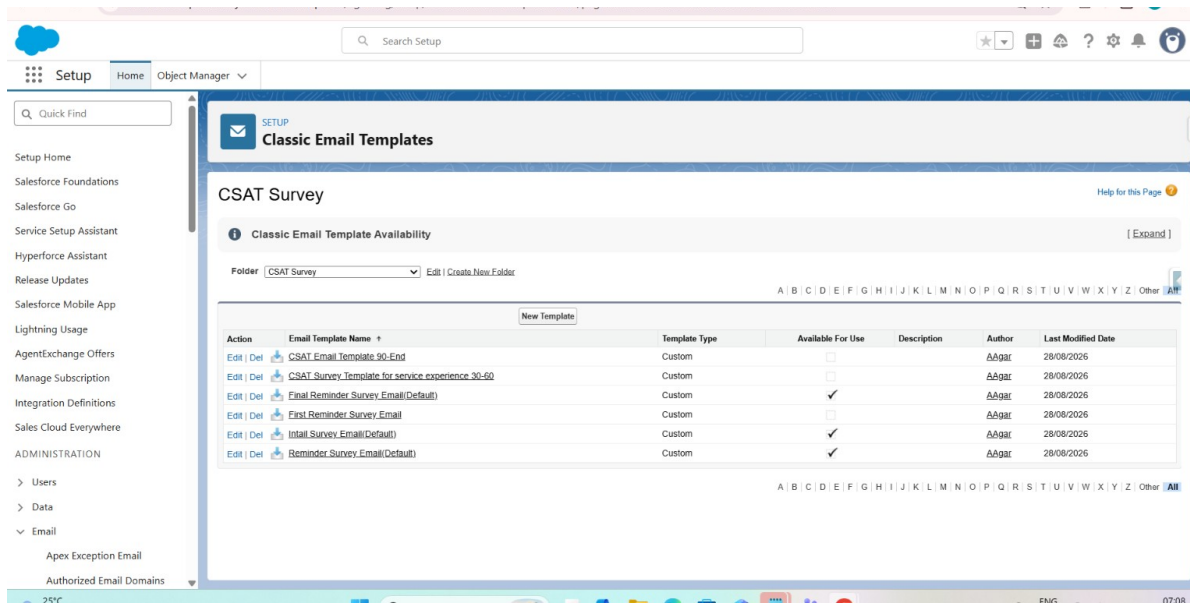
Survey Reminder Email... Manage Templates Preview Survey Form

Opportunity when Closed won Mixed Question Max Reminders: 3

Search and select an Email Template for each reminder below. The **Start Survey** button will be automatically added to every email sent.
Slot 0 = Initial Send email, Slots 1+ = Reminder emails. If no template is selected for a slot, a default hardcoded email will be sent.

INITIAL SEND (REMINDER 0)
Install Survey Email(Default) Edit Template X

Survey Template record — click Manage Templates



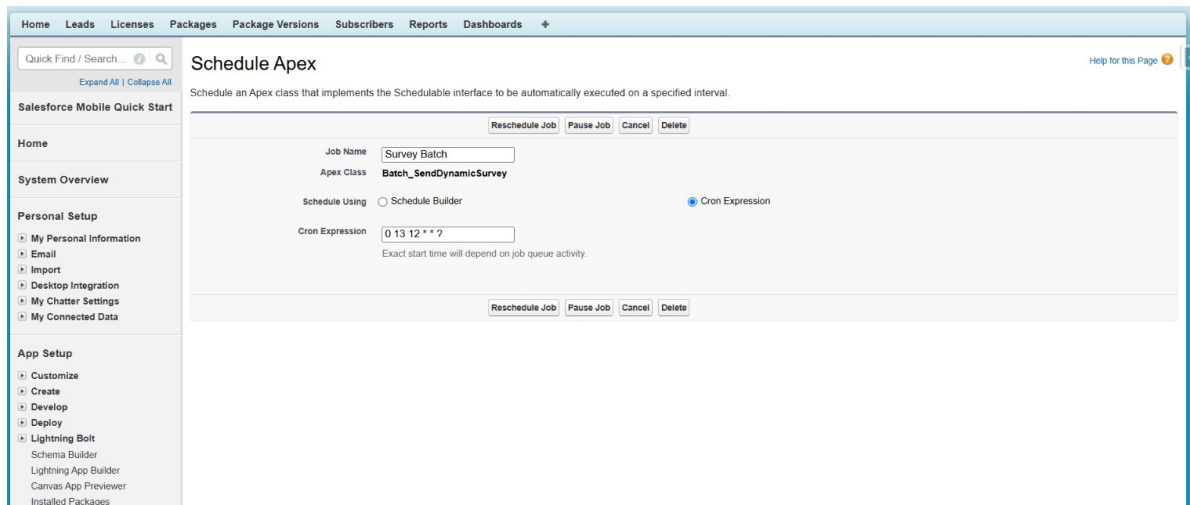
Classic Email Templates — CSAT Survey folder

From this page you can:

- Create a new email template using New Template, then assign it to a reminder slot using Change Email Templates... on the Survey Template record.
- Edit an existing default template directly (Edit) if you just want to update the wording of the given template instead of creating a new one.

6.3 Schedule the Survey Job

Surveys are sent by a scheduled Apex job. Use Schedule Apex (Setup → Scheduled Jobs) to control the date and time — or day of the week — the survey batch runs.

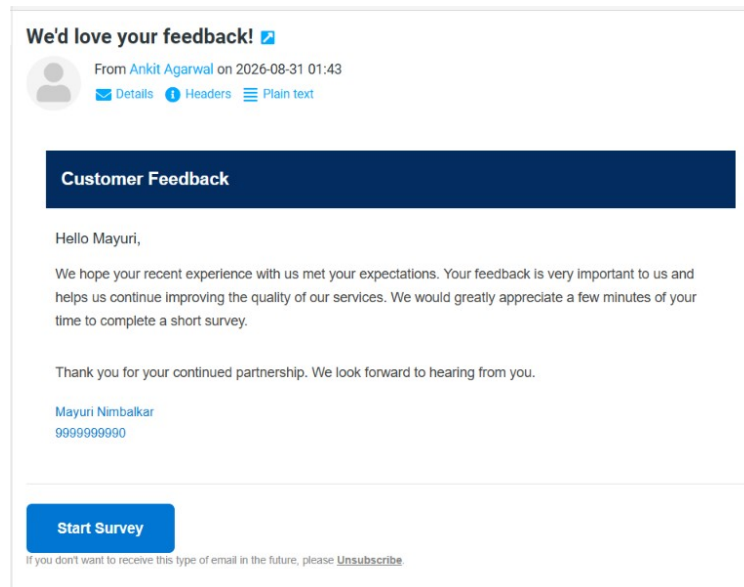


Schedule Apex — Batch_SendDynamicSurvey job with a configurable Cron Expression

6.4 Survey Delivery Requirements

The survey email is sent to the Contact related to the Case, Campaign, or Opportunity that triggered the survey. A Contact with a valid email address is mandatory — if the related Contact has no email, the survey cannot be delivered.

Once the scheduled job runs, the survey email is sent automatically to that Contact. It looks like this:



Survey email received by the Contact — click Start Survey to open the form

6.5 Completing the Survey Form

Clicking Start Survey opens the survey form in the browser. All questions on the form are mandatory and must be answered before the form can be submitted.

A screenshot of a web browser showing a survey form. The browser's address bar shows the URL "deaninfotechpvttd3.my.site.com/surveyform/?sr=survey&srld=a15050000E8TBVAZ&type=OppClosedwon". The survey form has a blue header that says "How We Can Improve Our Performance?". Below the header, it says "PLEASE ANSWER EACH QUESTION BELOW". The first question is "How would you rate the usefulness of the app in your daily activities?" with five radio button options: "Excellent" (selected), "Good", "Average", "Poor", and "Very Poor". The second question is "How would you rate your overall experience with the app, considering its features, ease of use, design, performance, navigation, and how well it met your expectations?" with a star rating system showing five stars. The third question is "How likely are you to recommend this app to your friends, family, colleagues, or others based on your overall experience?" with a scale from 1 to 10. The scale shows numbers 1 through 10 in colored boxes, with 10 being the highest rating. Below the scale, it says "Not at all likely" and "Extremely likely". The fourth question is "How easy and convenient was it for you to use the app, including navigating through different screens, finding the information or features you needed, understanding the available options, completing your tasks, and interacting with the overall user interface?" with a scale from 1 to 5. The scale shows numbers 1 through 5 in colored boxes, with 4 being the highest rating.

Survey form — Radio, Star rating, and Scale 1–10 questions answered

Click a star to rate (1 = Poor, 5 = Excellent)

How likely are you to recommend this app to your friends, family, colleagues, or others based on your overall experience?

1 2 3 4 5 6 7 8 9 10

Not at all likely Extremely likely

How easy and convenient was it for you to use the app, including navigating through different screens, finding the information or features you needed, understanding the available options, completing your tasks, and interacting with the overall user interf

1 2 3 4 5

Not at all satisfied Very satisfied

What did you like most about using the app, and which features, functionalities, design elements, or overall aspects of the app made your experience more useful, convenient, enjoyable, or satisfying?

I liked the app because it is easy to use, has a simple and intuitive design, provides useful features, and makes it easy to complete tasks quickly and efficiently. The smooth navigation, clear interface, and overall performance made my experience convenient and enjoyable.

How can we improve? *

The app is already easy to use and provides a good overall experience. We can make it even better by continuously improving performance, adding useful features, simplifying navigation, and incorporating user feedback to make the experience more convenient and enjoyable.

* All fields are required

Submit Survey

Powered byDean Infotech

Survey form — remaining questions, free-text answers, and Submit Survey

Once every required question is answered, clicking Submit Survey saves the response and marks that survey record as Completed.

7. Pre-Go-Live Testing

Test the complete configuration before enabling the survey for real customer activity.

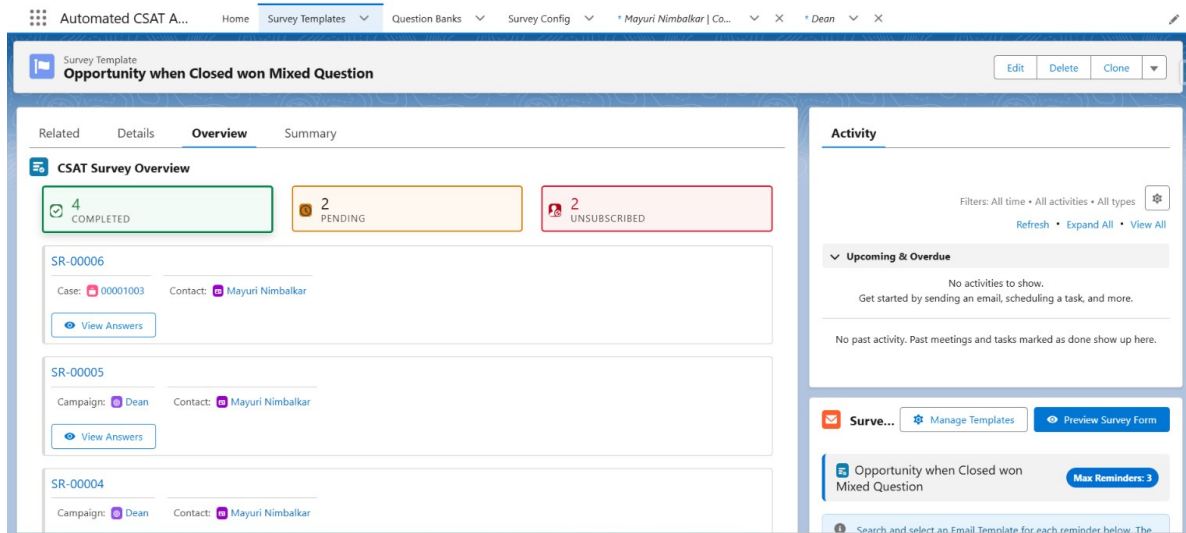
- Use Preview Survey Form to confirm that linked questions render correctly.
- Create or use a test record matching the configured Object Type and Trigger Event.
- Confirm the survey email is sent.
- Complete a test response and confirm the response is captured.
- Check the CSAT dashboard/reports to confirm that the send appears correctly.

These are the testing steps explicitly documented in the source guide.

8. Viewing Survey Results

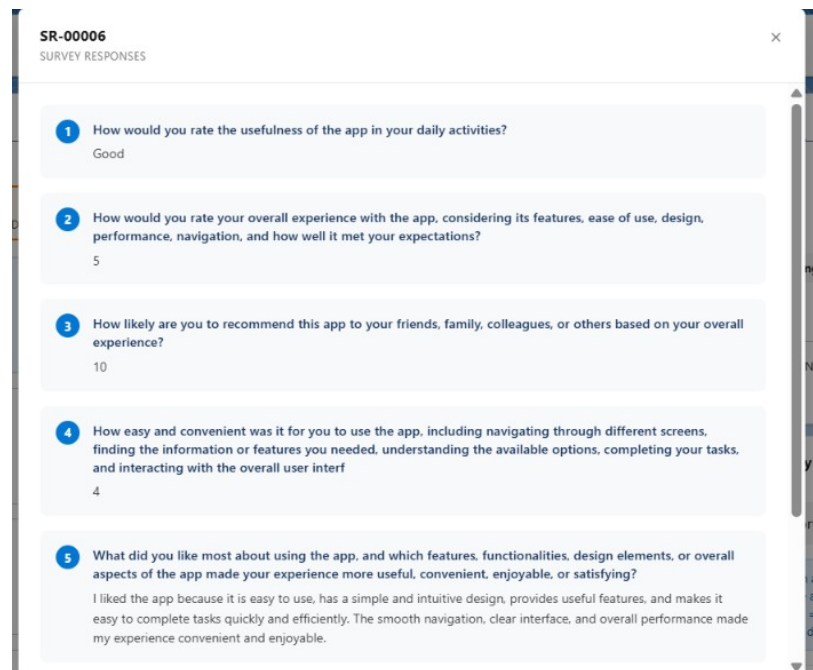
Overview Tab

The Survey Template Overview tab shows Completed, Pending, and Unsubscribed response counts, together with individual survey records showing the related object and Contact name.



Survey Template — Overview tab showing Completed, Pending, and Unsubscribed counts

Click View Answers on any survey record to open the submitted question-by-question responses.



Survey Responses — question-by-question answers as submitted

Scrolling down shows the free-text "How can we improve?" answer, along with the Survey Sent Date, Survey Completed Date, and Reminder Count — so you can confirm exactly when the survey went out and when it was completed.

SR-00006
SURVEY RESPONSES

3 How likely are you to recommend this app to your friends, family, colleagues, or others based on your overall experience?
10

4 How easy and convenient was it for you to use the app, including navigating through different screens, finding the information or features you needed, understanding the available options, completing your tasks, and interacting with the overall user interf
4

5 What did you like most about using the app, and which features, functionalities, design elements, or overall aspects of the app made your experience more useful, convenient, enjoyable, or satisfying?
I liked the app because it is easy to use, has a simple and intuitive design, provides useful features, and makes it easy to complete tasks quickly and efficiently. The smooth navigation, clear interface, and overall performance made my experience convenient and enjoyable.

How can we improve?
The app is already easy to use and provides a good overall experience. We can make it even better by continuously improving performance, adding useful features, simplifying navigation, and incorporating user feedback to make the experience more convenient and enjoyable.

SURVEY SENT DATE
31 Aug 2026

REMINDER COUNT
0

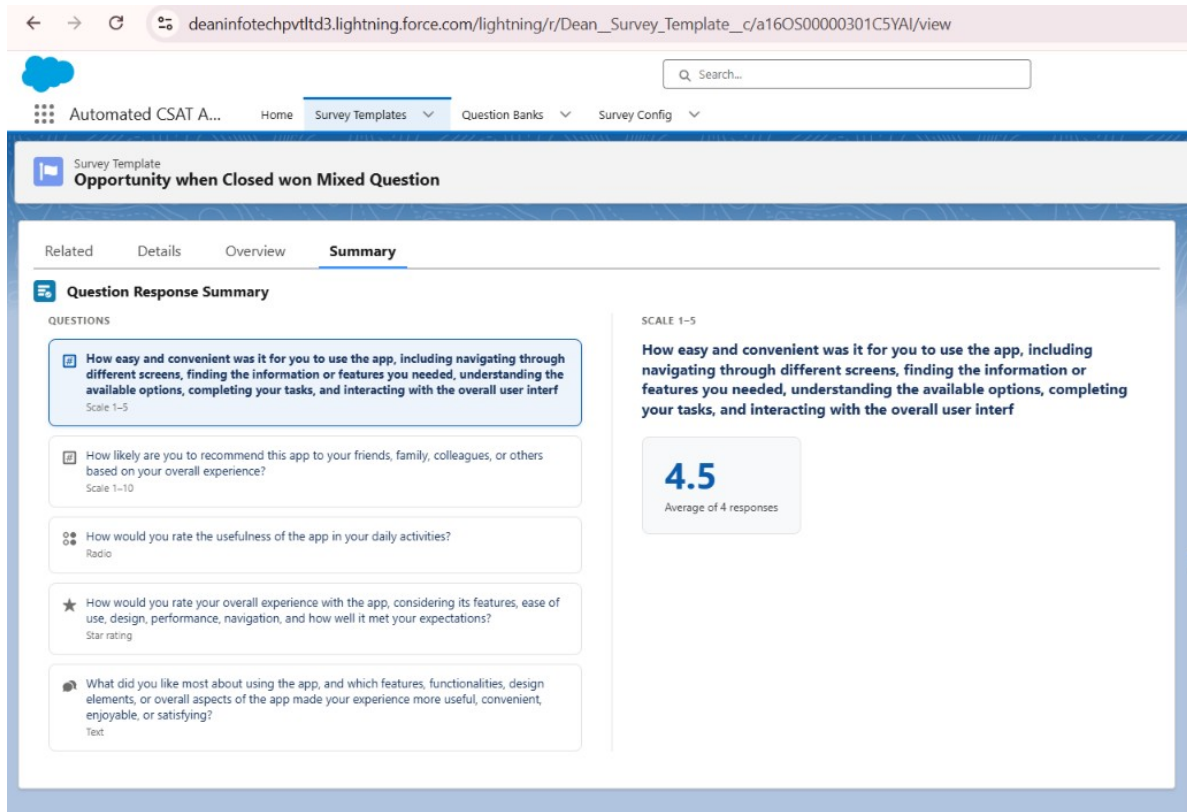
SURVEY COMPLETED DATE
31 Aug 2026

Survey Responses — "How can we improve?" answer, Survey Sent Date, Reminder Count, and Survey Completed Date

Summary Tab

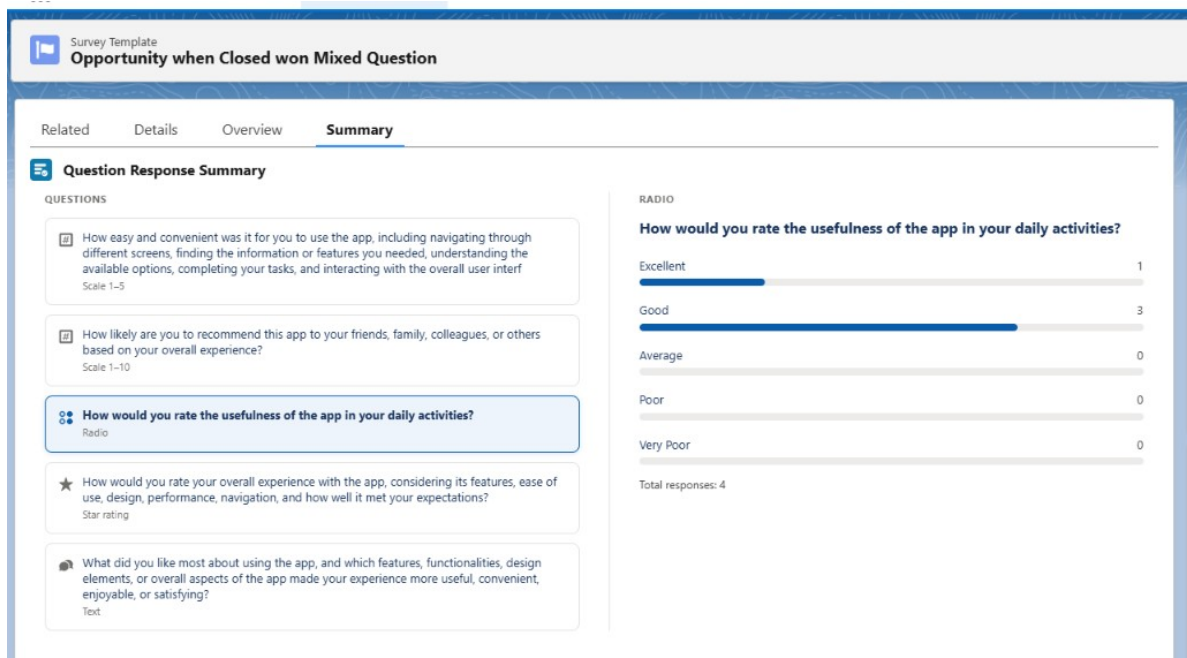
Question Type	Summary result
Scale 1–5	Average across responses
Scale 1–10	Average across responses
Star rating	Average across responses
Text	Individual text answers
Radio	Breakdown by selected option

Selecting a question on the Summary tab shows its aggregated result on the right. For Scale and Star rating questions, this is the average across all responses:



Summary — Scale 1-5 question showing the average of all responses

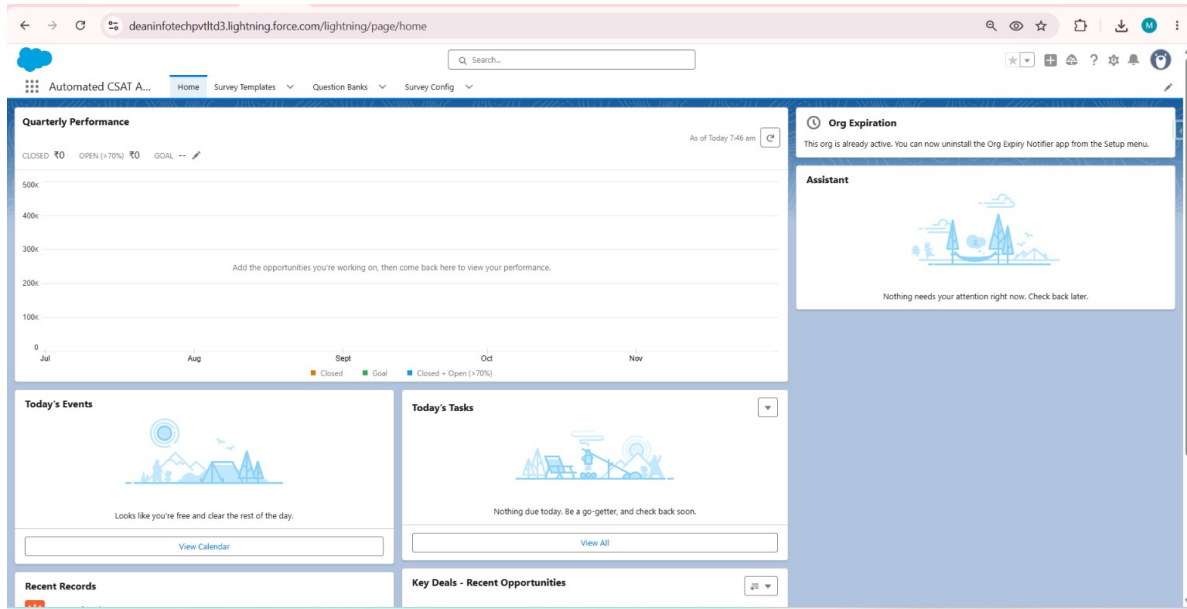
Radio breakdowns use the Chosen values configured on the Question Bank record, and show how many respondents selected each option:



Summary — Radio question showing a response breakdown by option

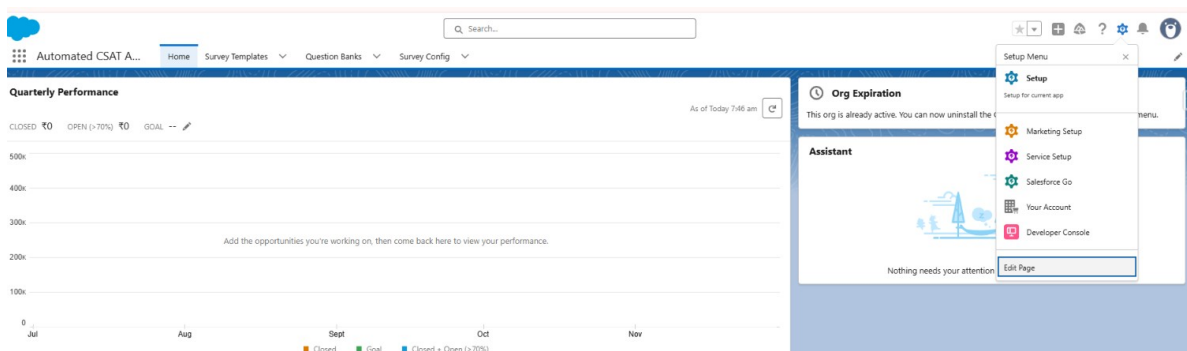
9. Add the Survey Dashboard to the Home Page

Three CSAT survey dashboards are pre-built in the org — one each for Case, Opportunity, and Campaign. Any of them can be pinned to the app Home tab so results are visible as soon as you log in.



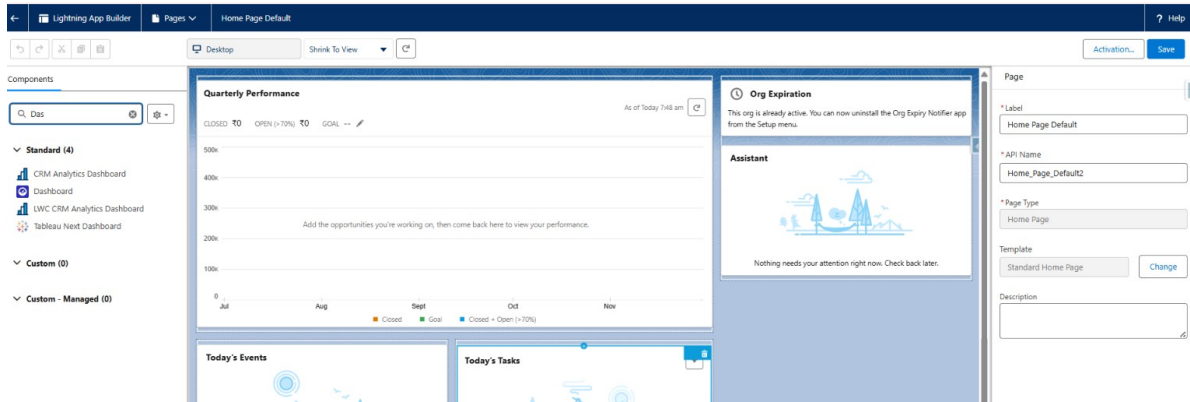
Home tab — starting point before adding the dashboard

1. From the Home tab, click the Setup (gear) icon, then click Edit Page.



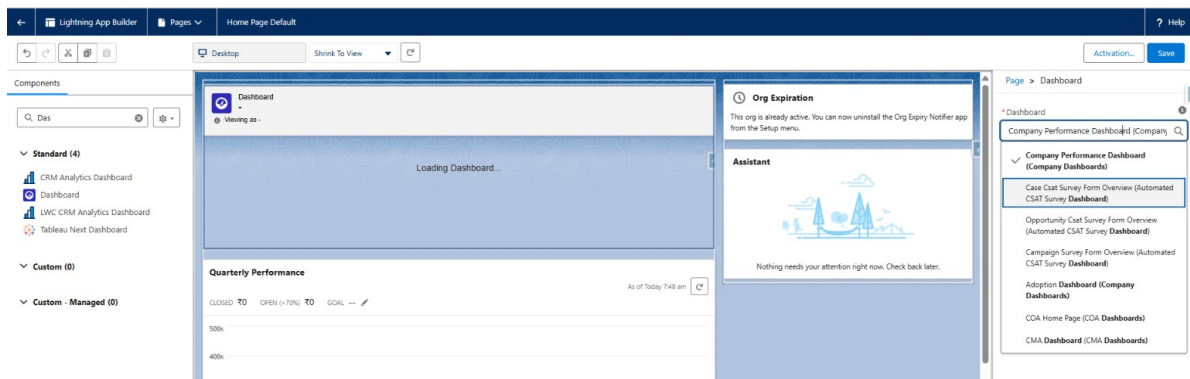
Setup menu — click Edit Page to open the Home page in Lightning App Builder

2. In the Components panel on the left, search for Dashboard and drag it onto the page.



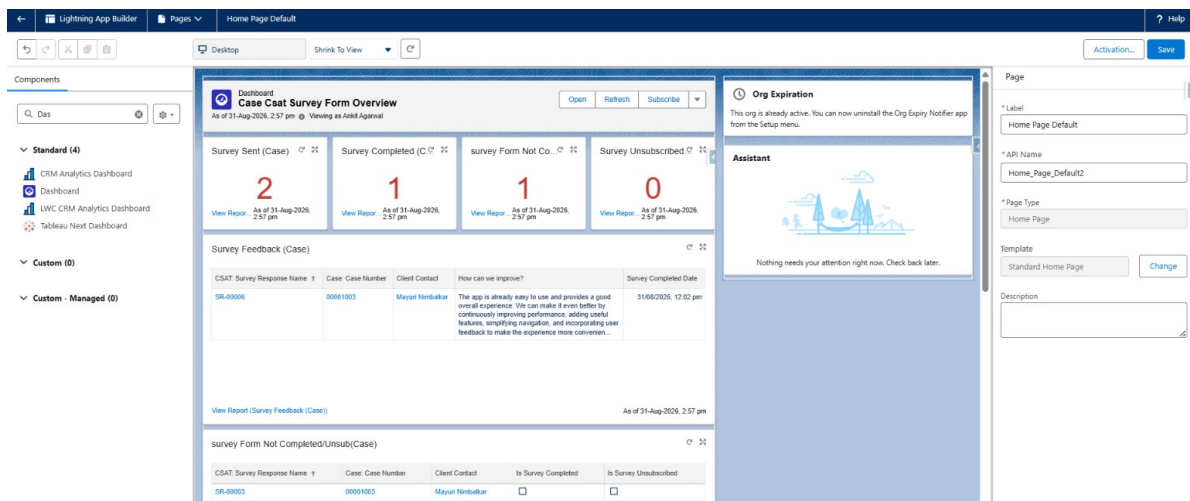
Lightning App Builder — search Components for Dashboard

3. With the Dashboard component selected, use the Dashboard field on the right to choose which of the three CSAT dashboards to show — Case, Opportunity, or Campaign, depending on which one is needed.



Dashboard picker — choose the Case, Opportunity, or Campaign CSAT Survey dashboard

4. Click Save (and Activate the page if prompted). The selected dashboard now appears on the Home tab, showing Survey Sent, Survey Completed, Survey Form Not Completed, and Survey Unsubscribed counts along with the underlying records.



Home tab — Case CSAT Survey Form Overview dashboard now visible

10. Troubleshooting

Issue	Check / resolution
Question does not appear	Confirm the Question Bank record is linked to the Survey Template and is configured correctly.
Radio options are missing	Confirm at least two values were moved from Available to Chosen.
Survey Config cannot be saved	Confirm Object Type and Trigger Event are not --None--.
No reminder emails are sent	Check Max Reminders; a value of 0 means no reminders.
Wrong number of reminder slots	Check Max Reminders and save the updated Survey Template.
Sort Order validation error	Use a whole number from 1 through 20.
Survey does not trigger in testing	Verify the test record matches the configured Object Type and Trigger Event and that the configuration is active.

The troubleshooting checks above are derived from the documented validation rules and setup behavior.

11. Frequently Asked Questions

How many questions can one Survey Template have?

The documented Sort Order validation permits values from 1 to 20, so the source guide states that a maximum of 20 questions can be linked to a single Survey Template.

What happens when Max Reminders is 0?

Only the Initial Send email is sent; no reminder emails are sent.

Can Max Reminders be changed later?

Yes. Updating Max Reminders adjusts the number of reminder slots displayed on the saved template.

Why is a Question Bank question not appearing?

The source guide states that a question must be linked to a Survey Template to appear on a survey.

What object types are supported by the documented Survey Config?

Opportunity, Case, and Campaign.

12. Recommended Admin Checklist

- Create and save the Survey Template.
- Set Days to Send Survey, Max Reminders, and Reminder Interval Days.

- Configure custom email templates where required.
- Create each Question Bank entry and link it to the Survey Template.
- Confirm Answer Type and Radio Options where applicable.
- Set a valid Sort Order from 1 to 20.
- Create Survey Config with Object Type, Trigger Event, and Survey Template.
- Activate the required template/configuration.
- Preview the survey.
- Run a test record through the trigger.
- Confirm email delivery and response capture.
- Review Overview, Summary, and reporting results.

13. Information to Customize Before Publishing

The supplied source content does not document the following organization-specific details. Add them from your actual Salesforce configuration rather than assuming values:

- Salesforce login URL and environment name
- CSAT App Launcher/navigation screenshot
- Profiles, roles, permission sets, and access requirements
- Exact tab/object names as displayed in the org
- Actual dashboard and report names
- Support team/contact information
- Approved email-template naming conventions
- Business definitions for each trigger event

This section intentionally separates org-specific information from the documented source content.

14. Quick Reference

Step	Record / Action	Key outcome
1	Survey Template	Defines timing, reminders, and heading.
2	Reminder Emails	Controls Initial Send and reminder messaging.
3	Question Bank	Defines survey questions, answer types, and order.
4	Survey Config	Defines object and trigger event.
5	Test	Validates rendering, sending, capture, and reporting.
6	Overview / Summary	Reviews individual and aggregated results.
7	Home Dashboard	Pins the CSAT survey dashboard to the Home tab.

End of Guide