

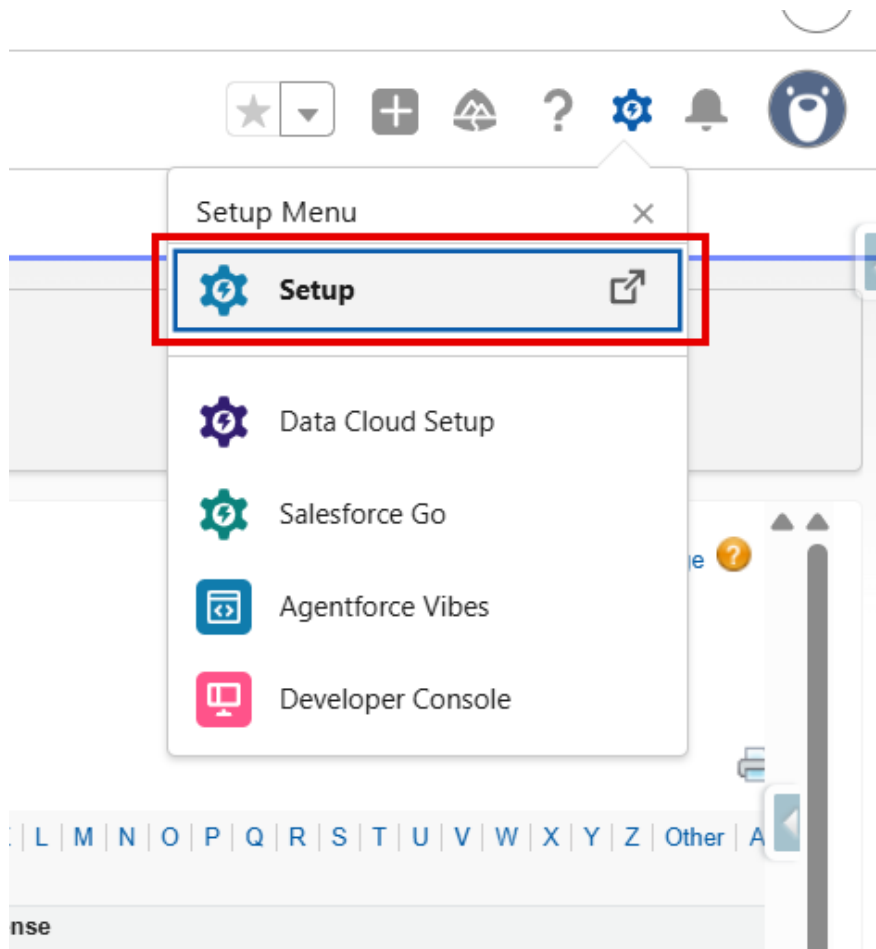
Post-Install Instructions

After installing the Automated CSAT Survey package, follow these steps to configure the system for CSAT Survey integration.

1. Assign Permission Set

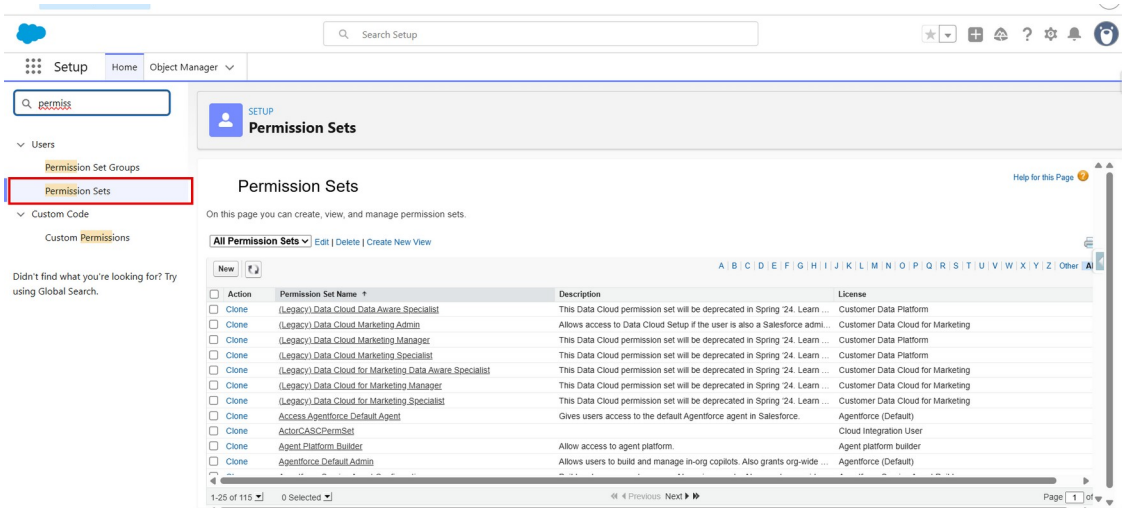
After the CSAT Survey App is installed, the first task is to grant the app's permission set to the users who need access.

1. Click the gear/Setup icon in the top-right corner of Salesforce, then click Setup from the dropdown menu to open the full Setup page.



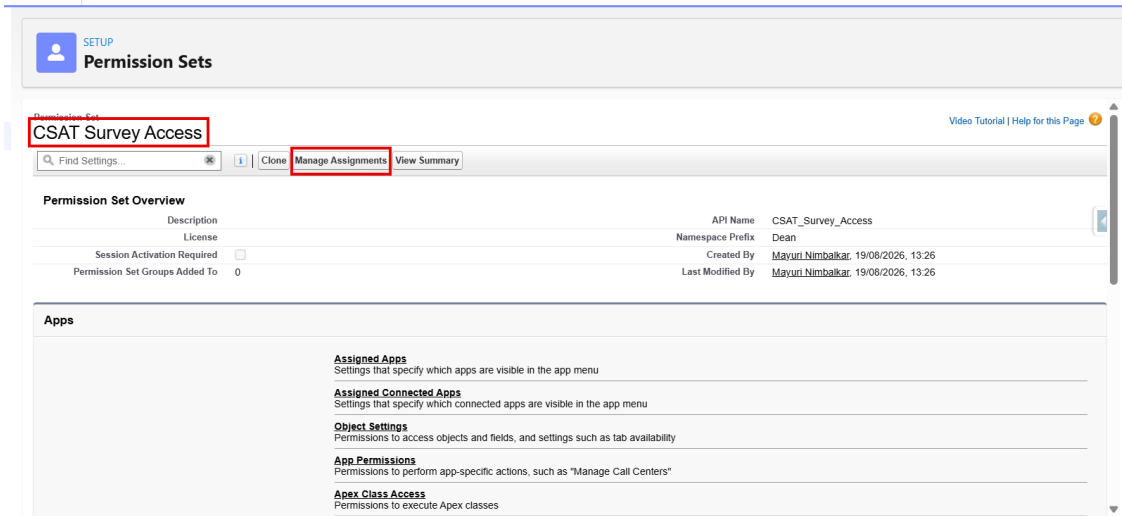
Setup menu — click “Setup”

2. In the Setup search box, type “permission set”. From the results in the left navigation panel, click Permission Sets under the Users section.



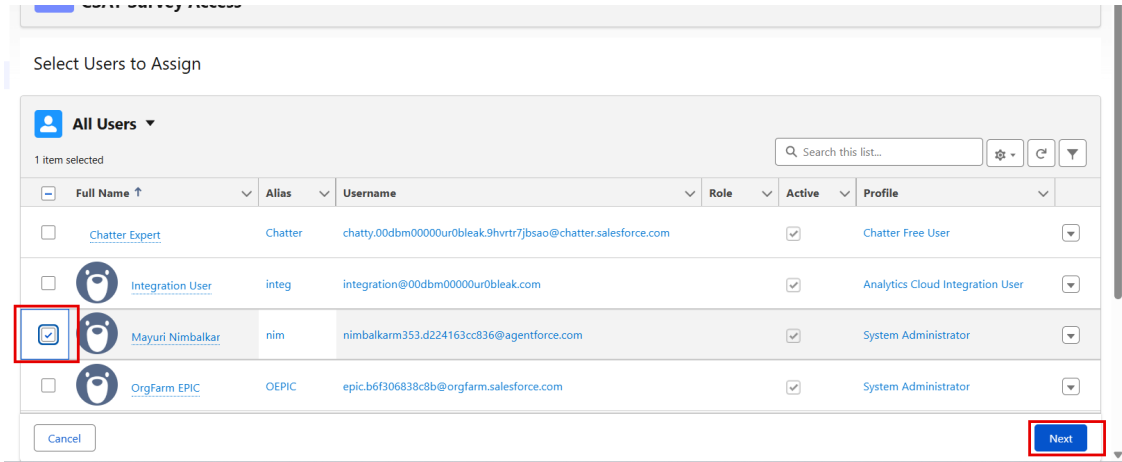
Setup search results — click “Permission Sets”

3. On the Permission Sets list page, locate and click CSAT Survey Access. This opens the permission set’s detail page. From here, click the Manage Assignments button.



CSAT Survey Access permission set page — click “Manage Assignments”

4. Click Add Assignment, then check the box next to the user(s) who should receive this permission set. Once selected, click Next.



Select Users to Assign — check the desired user and click “Next”

5. Choose an expiration option for the assignment — select No expiration date unless a time-limited assignment is required — then click Assign.

CSAT Survey Access

Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone: Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Mayuri Nimbalkar		System Administrator	✓	Salesforce	Never Expires

Cancel Back Assign

Expiration options — click “Assign”

6. The Assignment Summary page confirms the permission set was assigned successfully (Status: Success). Click Done to finish.

CSAT Survey Access

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Mayuri Nimbalkar	Salesforce			✓ Success

Done

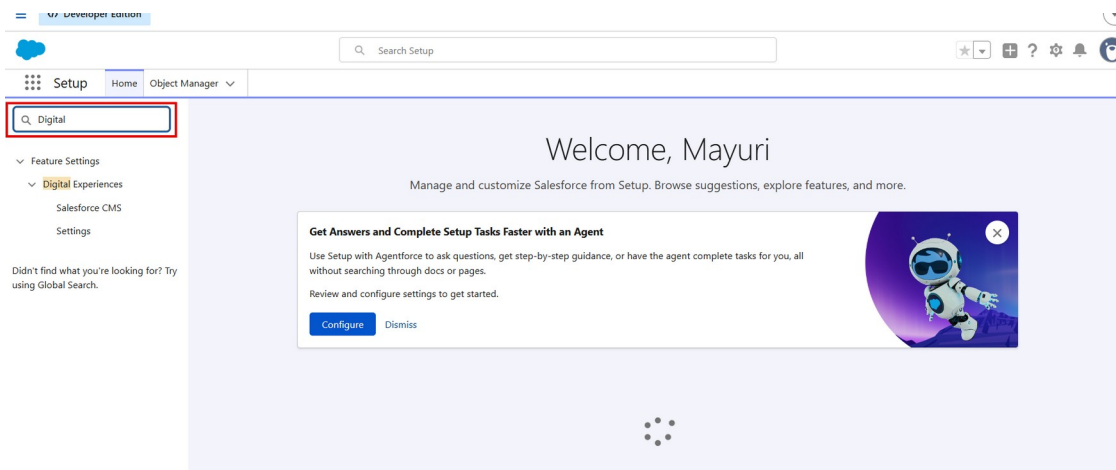
Assignment Summary — click “Done”

The CSAT Survey Access permission set is now assigned to the selected user, and the underlying app permissions are ready to use.

2. Enable Digital Experiences

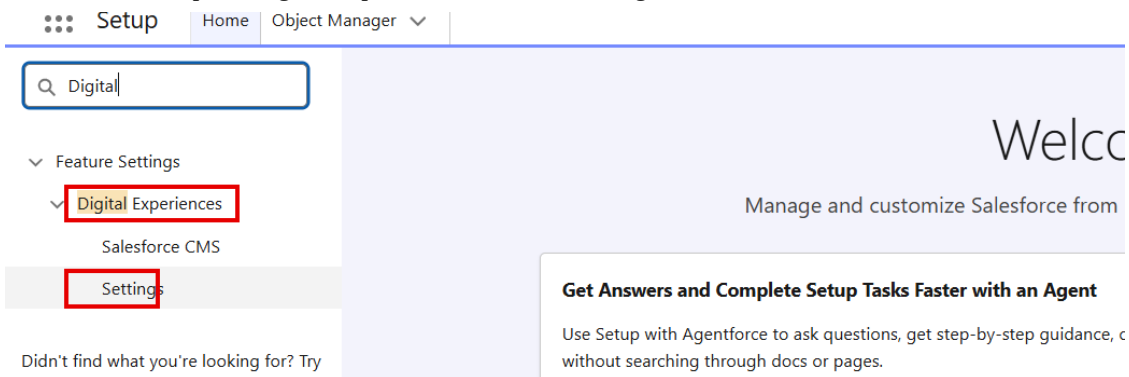
Next, enable Digital Experiences (Experience Cloud) so the CSAT survey can be published as a site.

1. From the Salesforce Setup Home page, type “Digital” in the search box in the left navigation panel to filter the Setup menu.



Setup Home — search box with “Digital” typed in

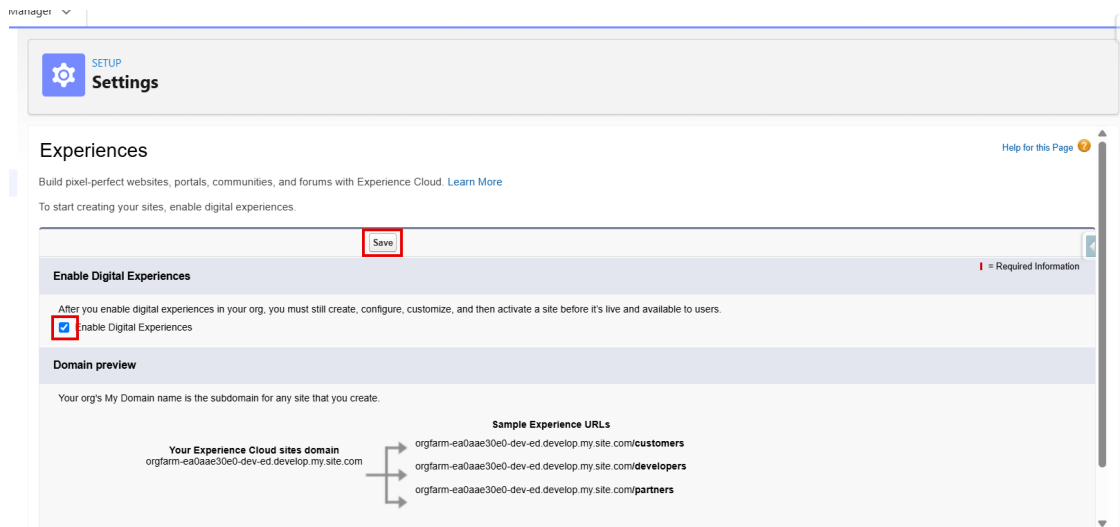
2. In the filtered results, expand Digital Experiences and click Settings.



Left navigation — “Digital Experiences” and “Settings”

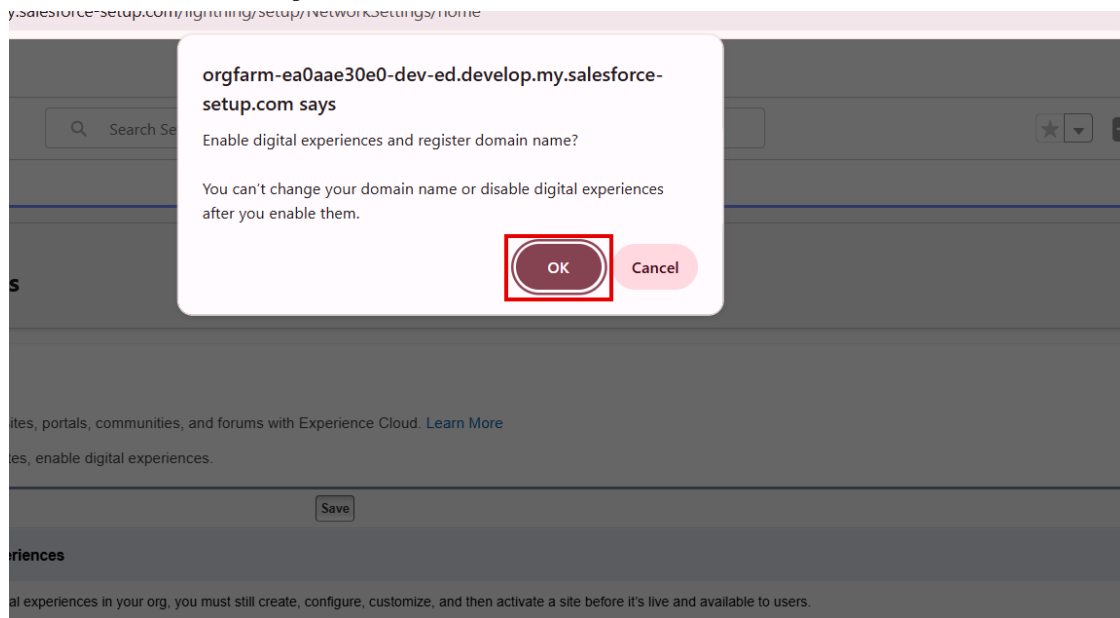
3. On the Experiences settings page, check the Enable Digital Experiences checkbox, then click Save.

Note: Once digital experiences are enabled and the domain name is registered, this action cannot be undone and the domain name cannot be changed.



Experiences settings — “Enable Digital Experiences” checkbox and “Save” button

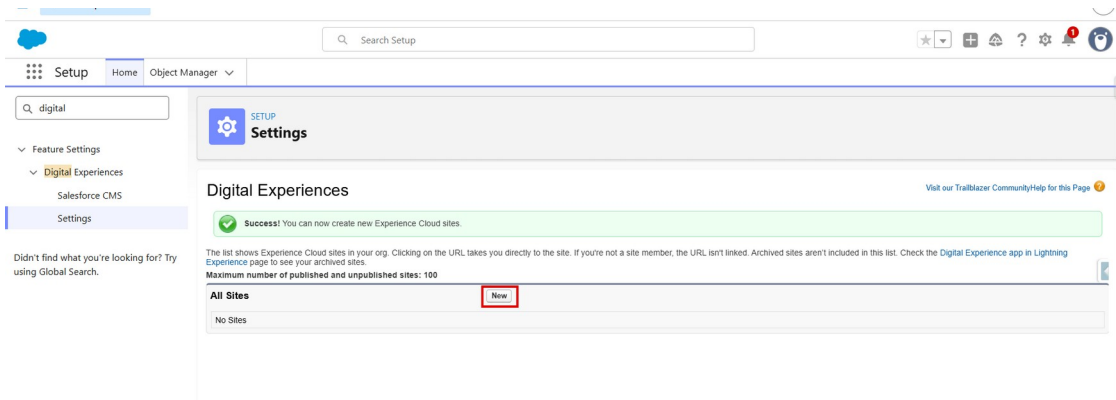
4. A confirmation popup appears, warning that the domain name cannot be changed and digital experiences cannot be disabled afterward. Click OK to proceed.



Confirmation popup — click “OK”

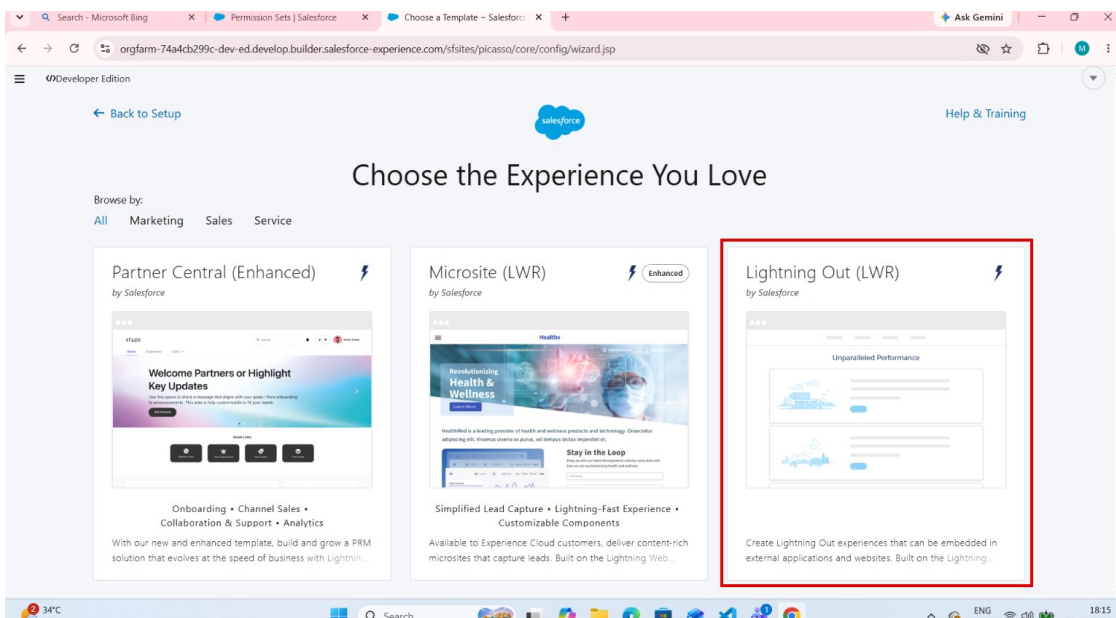
3. Create the Survey Site

1. Once digital experiences are enabled successfully, click the New button on the Digital Experiences settings page to create a new Experience Cloud site.



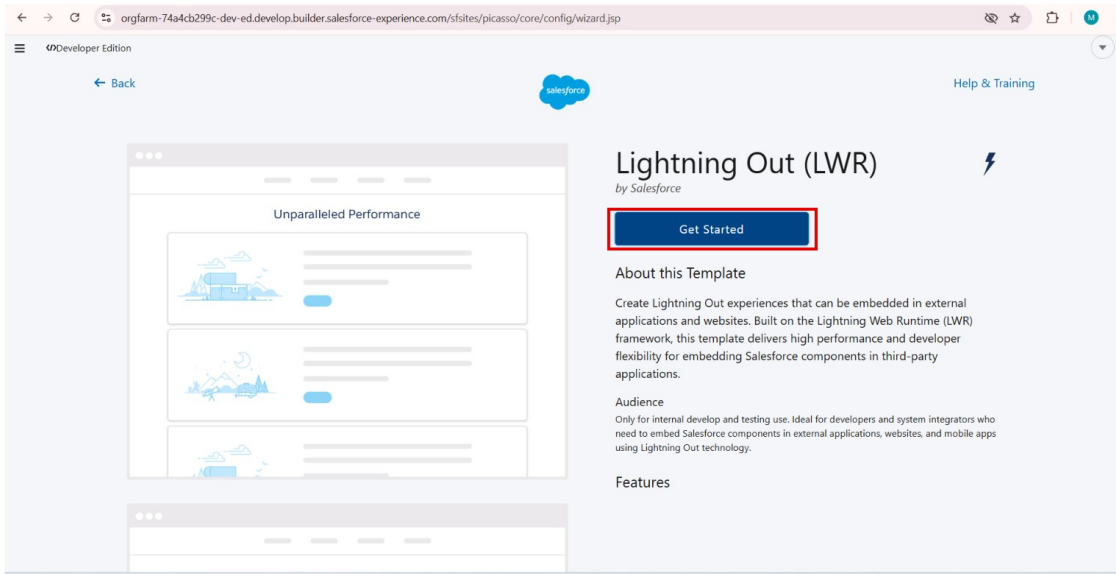
Digital Experiences settings (Success banner) — click “New”

2. On the template gallery, select the Lightning Out (LWR) template, which is built on the Lightning Web Runtime framework and lets Salesforce components (such as the CSAT survey) be embedded in external applications and websites.



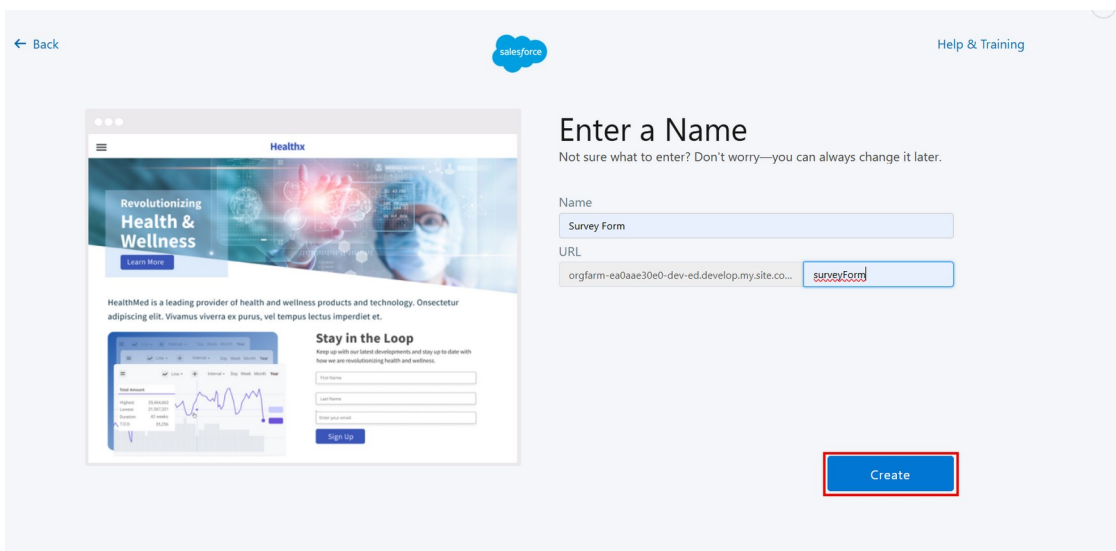
Choose the Experience You Love — “Lightning Out (LWR)” template card

3. On the Lightning Out (LWR) template preview page, click Get Started to continue.



Lightning Out (LWR) template page — click “Get Started”

4. Enter a name for the site, for example Survey Form. The URL field auto-populates based on the name (it can be left as-is or customized). Click Create to generate the site.



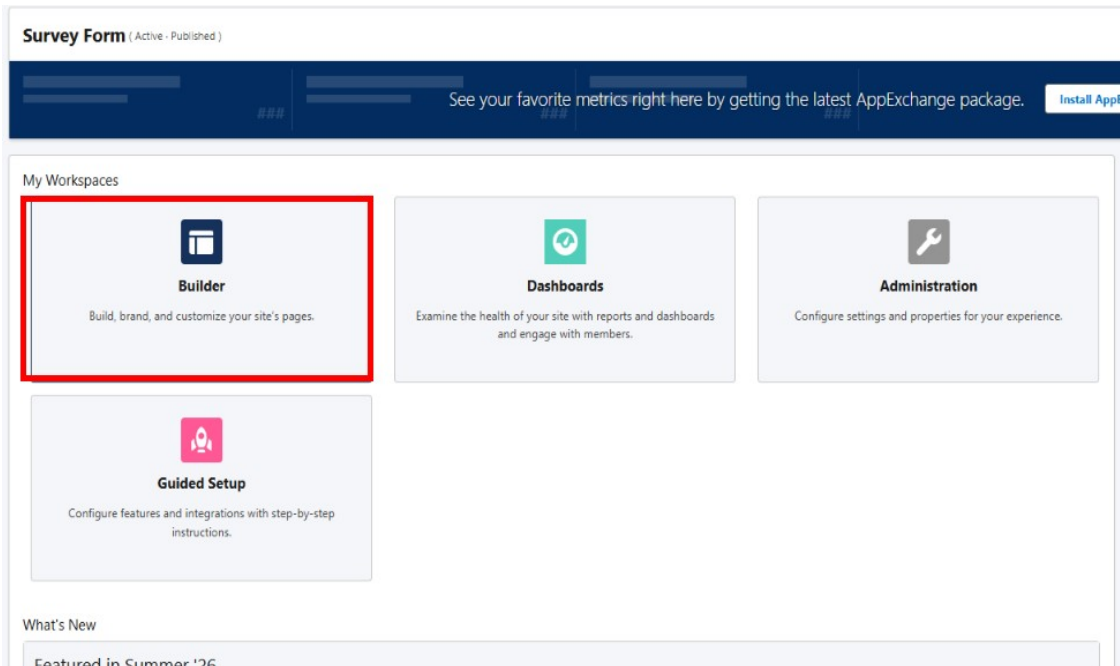
Enter a Name — site name entered, click “Create”

4. Build the Survey Page

4.1 Add the Survey Form Component

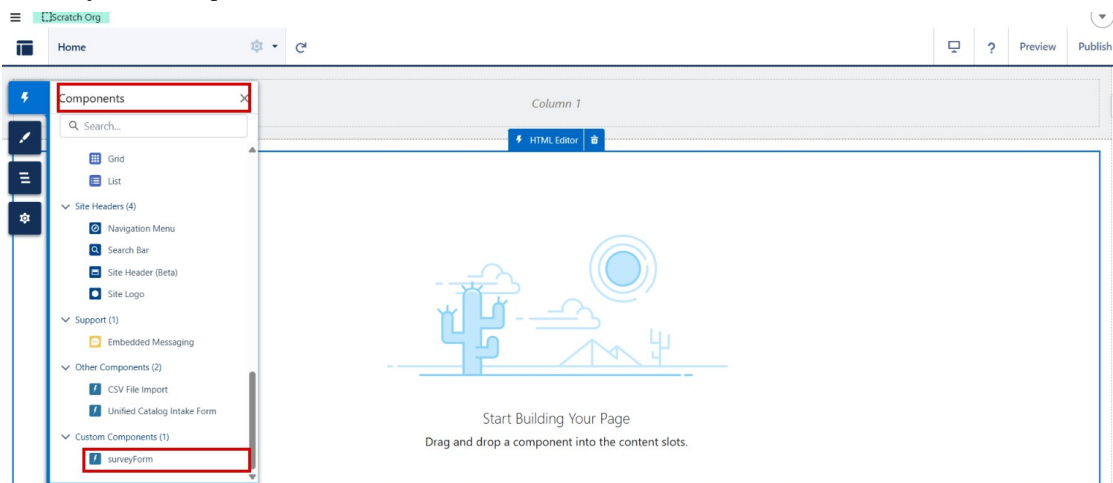
Open the site in Builder to add the custom survey form component to the page.

1. From the site workspace (shown as Survey Form — Preview, Unpublished), click Builder.



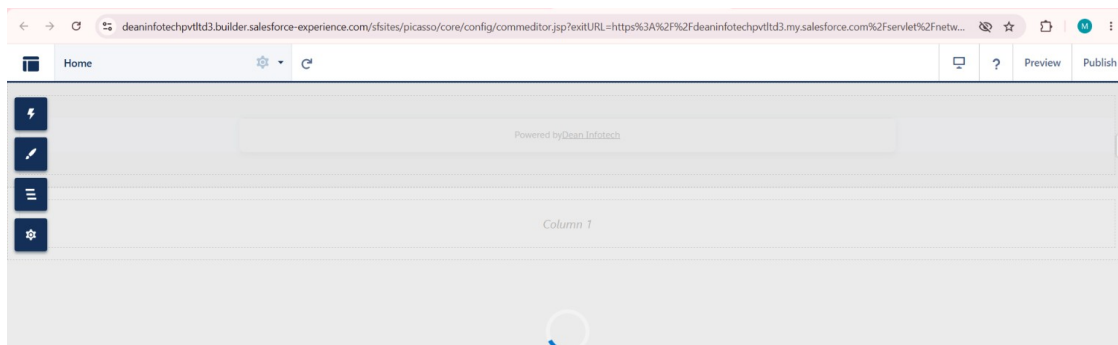
Site workspace — click Builder to edit the page

1. In the Components panel on the left, expand Custom Components.
2. Drag the surveyForm component onto Column 1.

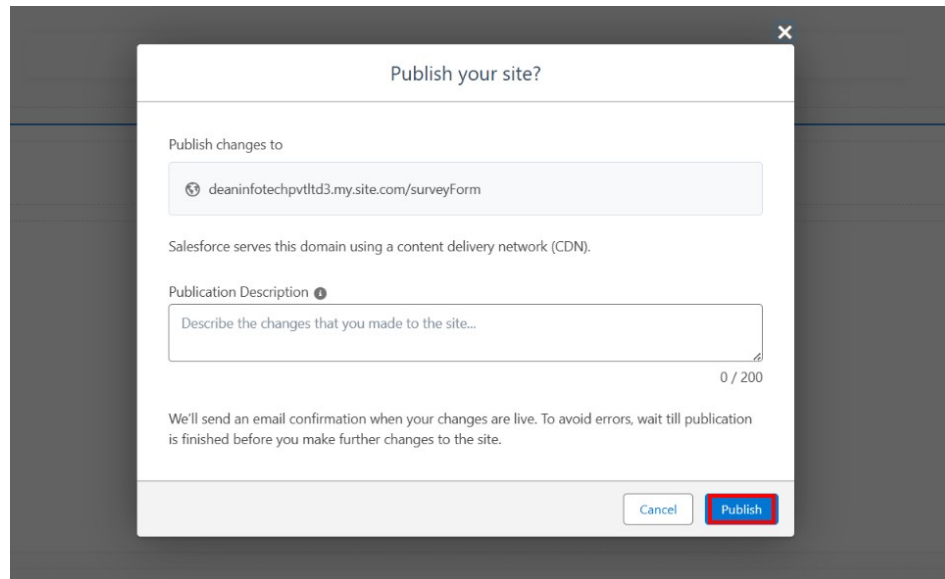


Builder — Components panel > Custom Components > drag surveyForm onto Column 1

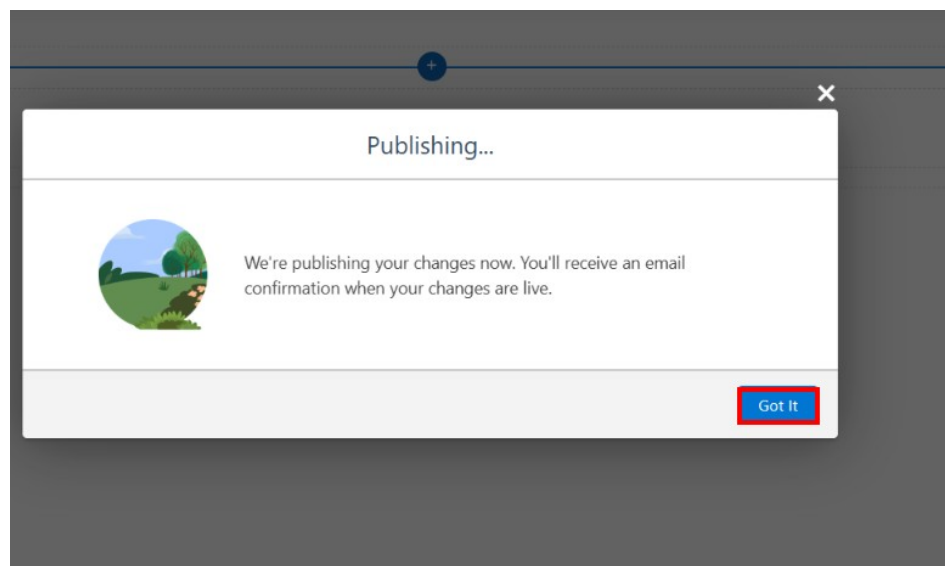
1. Click Publish, then confirm Publish. This saves and publishes the page changes.



Site workspace loading in Builder



Publish your site — click Publish to confirm

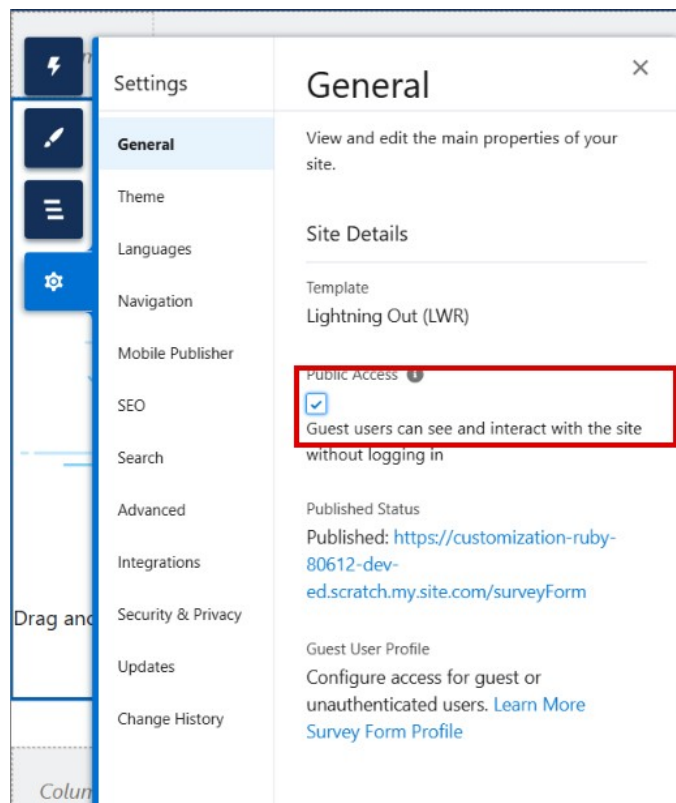


Publishing in progress — click Got It

4.2 Enable Public Access

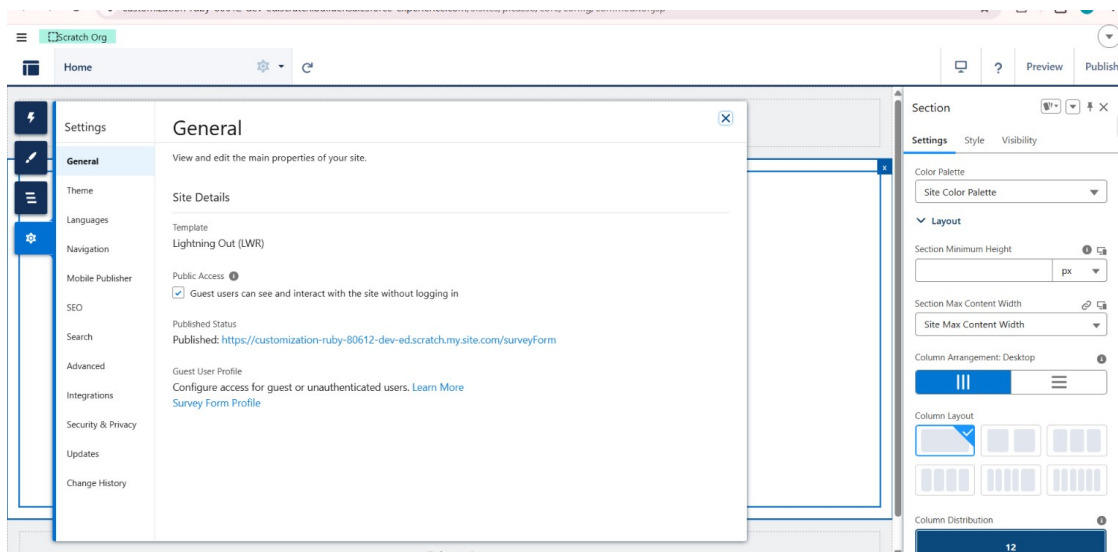
Guest (unauthenticated) users must be granted public access before they can view the survey page.

1. Click the Settings (gear) icon, then select General.
2. Under Public Access, check Guest users can see and interact with the site without logging in.

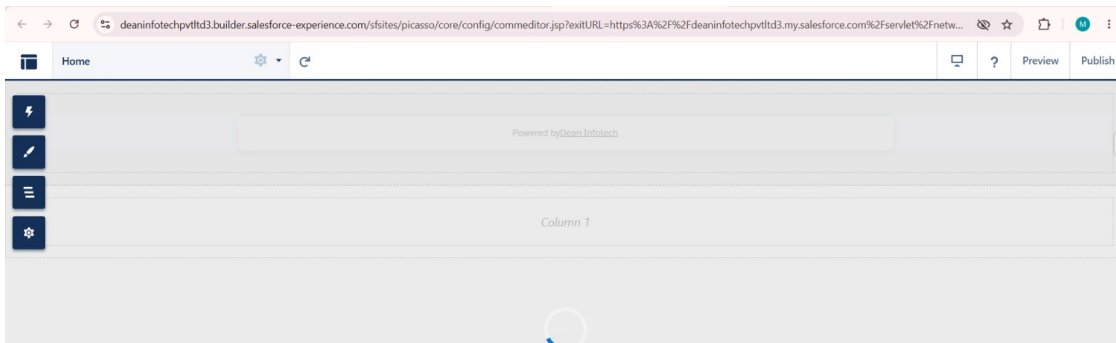


Settings > General — enable Public Access

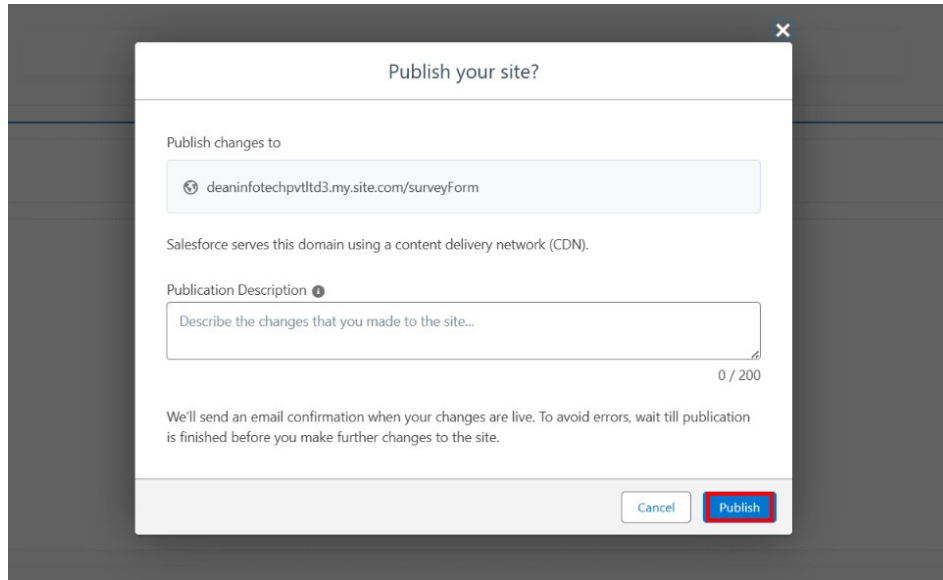
1. Click Publish again to make the change live.



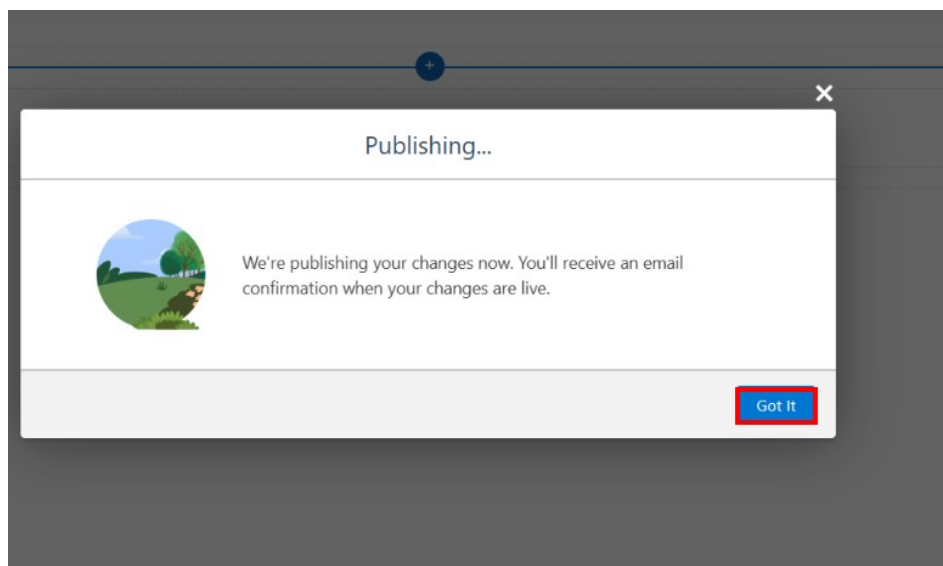
Settings > General — Public Access enabled, ready to publish



Site workspace loading in Builder



Publish your site — click Publish to confirm



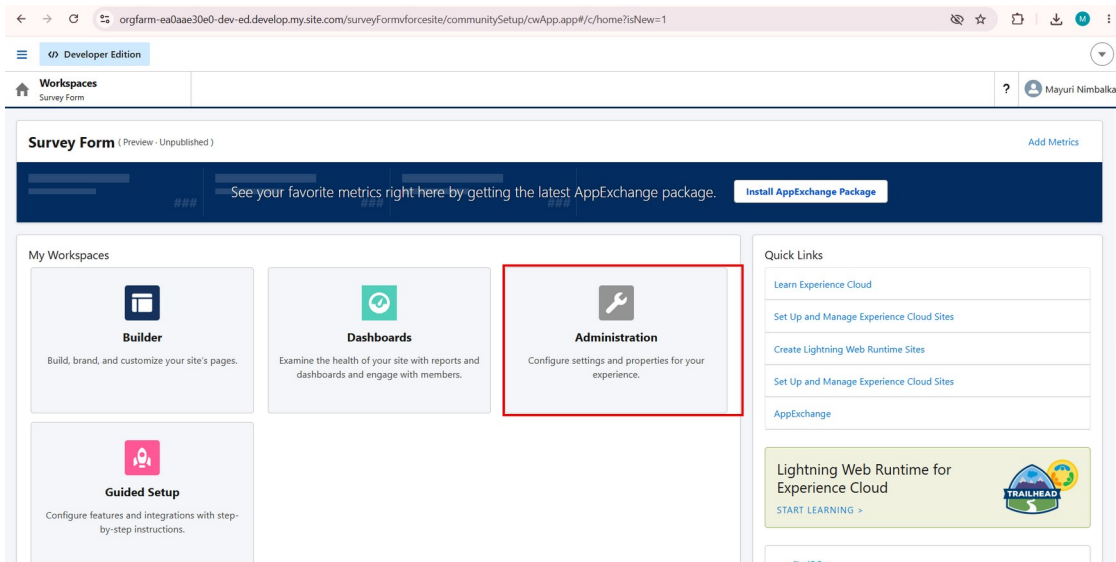
Publishing in progress — click Got It

Important: any time you make a change to the page or its settings, you must click Publish again for that change to take effect.

5. Activate the Site

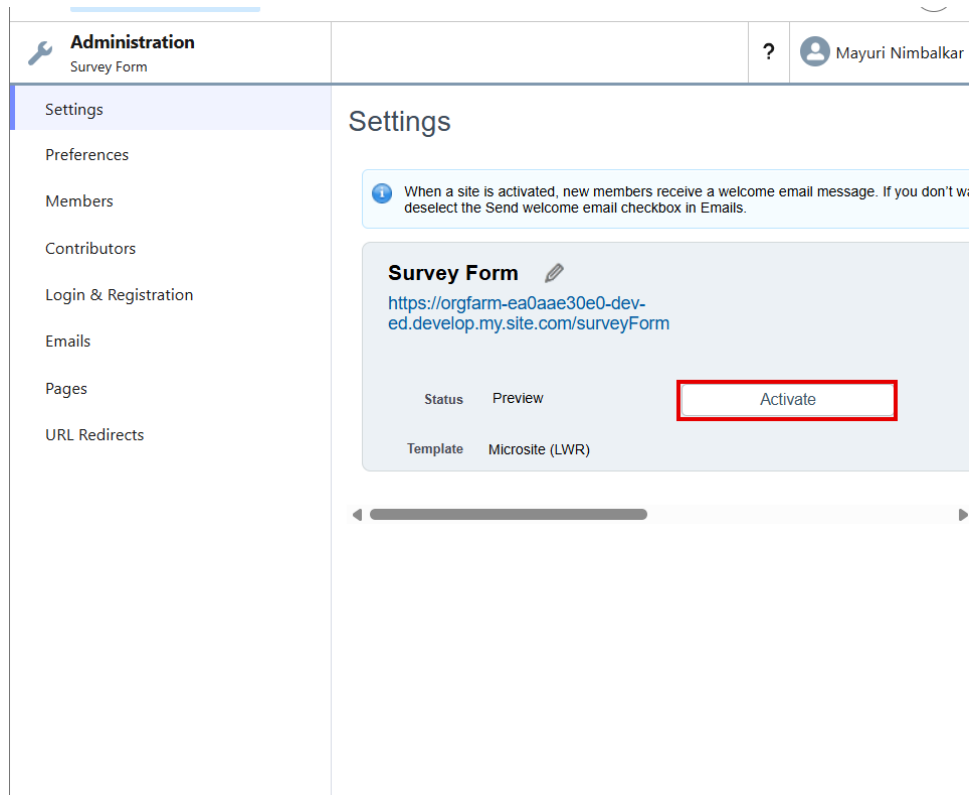
Once the page is built and published, activate the site so it can go live.

1. Go to the Workspaces tab, then open Survey Form.
2. Click the Administration tile.



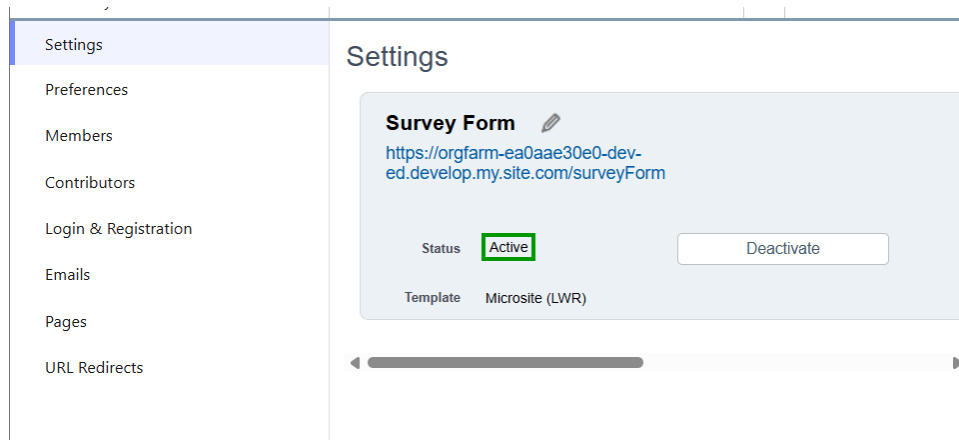
Workspaces — click the Administration tile

1. On the Administration > Settings page, the Status currently shows Preview.
2. Click Activate.



Administration > Settings — Status: Preview, click Activate

1. A confirmation popup appears — click OK to confirm.
2. The Status now shows Active.



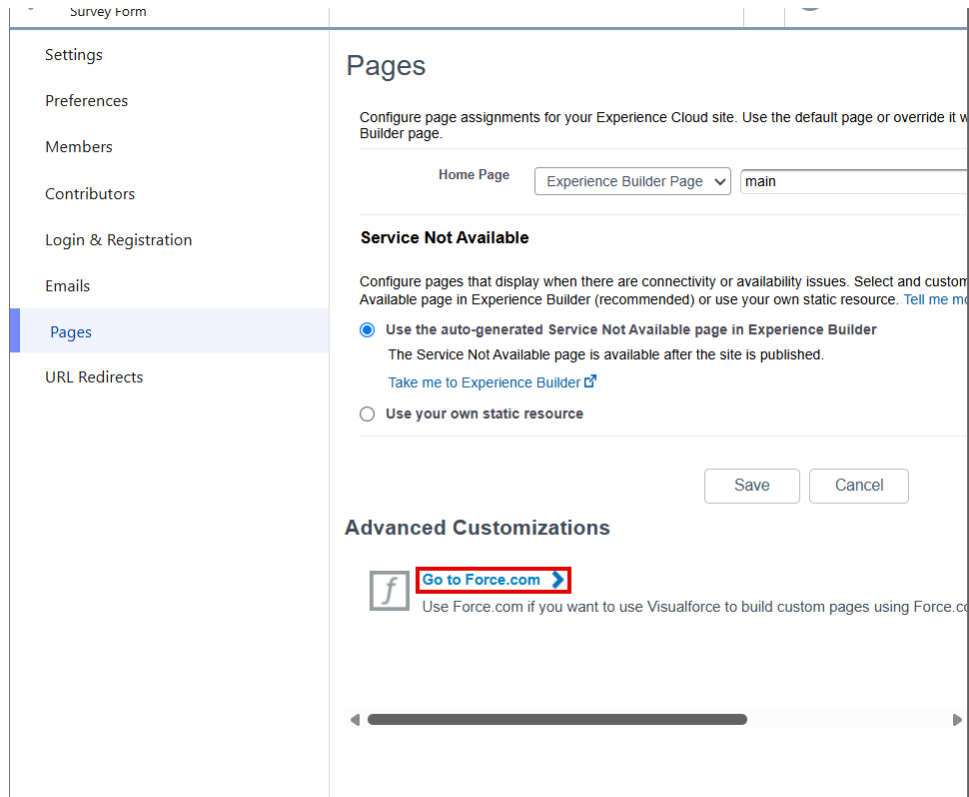
Administration > Settings — Status now shows Active

6. Configure Public Access Settings

6.1 Navigate to Public Access Settings

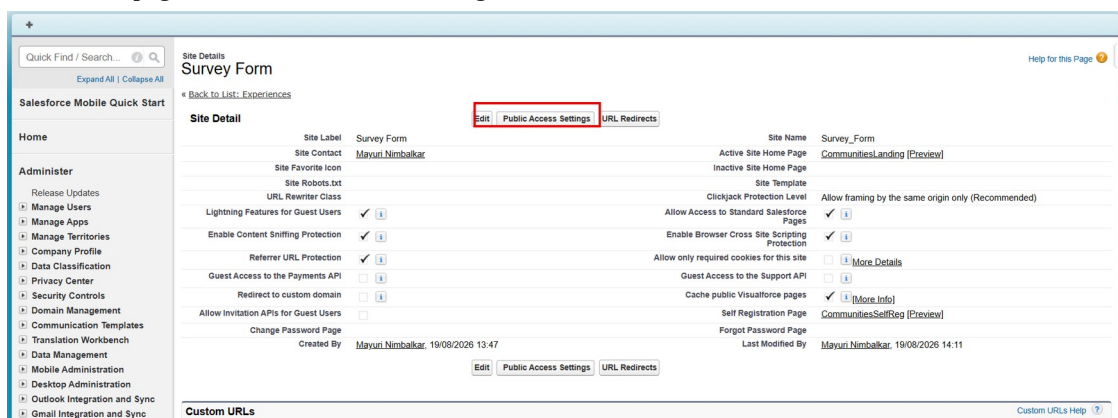
Public Access Settings control what guest (unauthenticated) users can see and do on the site, and are configured from the classic Force.com site page.

1. From the site workspace, go to Administration > Pages.
2. Under Advanced Customizations, click Go to Force.com.



Administration > Pages > Advanced Customizations — Go to Force.com

1. On the Site Detail page, click Public Access Settings.

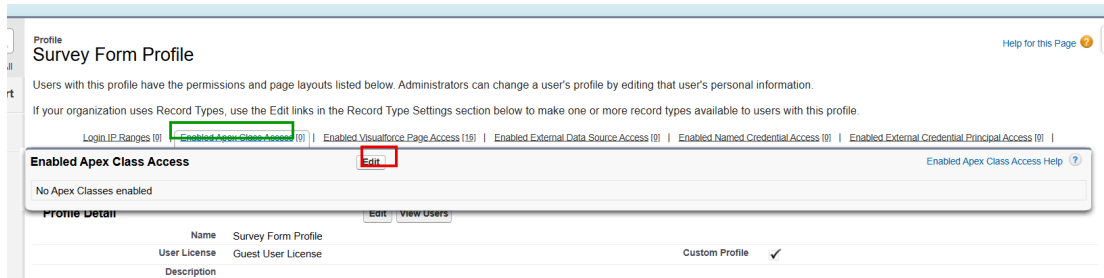


Site Detail page — click Public Access Settings

6.2 Enabled Apex Class Access

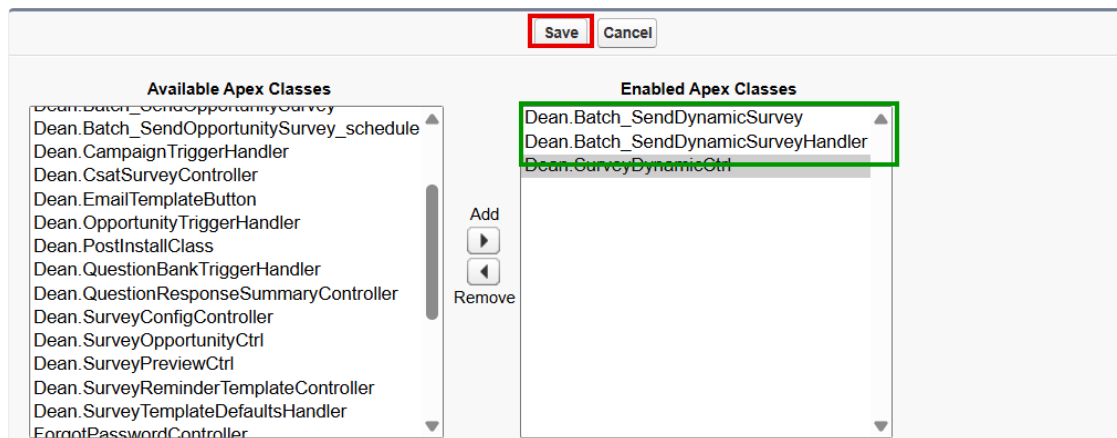
From the guest user's profile (Public Access Settings), enable access to the three Apex classes the survey form needs to run for guest users.

1. Scroll to Enabled Apex Class Access and click Edit.



Survey Form Profile — Enabled Apex Class Access (currently 0), click Edit

1. In the Available Apex Classes list, select and add these three classes to Enabled Apex Classes: Batch_SendDynamicSurvey, Batch_SendDynamicSurveyHandler, and SurveyDynamicCtrl.
2. Click Save.



Enabled Apex Class Access — Batch_SendDynamicSurvey, Batch_SendDynamicSurveyHandler, SurveyDynamicCtrl added

6.3 Custom Object Permissions

Still within Public Access Settings, scroll to Object Settings and grant the guest user Read and Create access on the custom objects used by the survey.

1. Grant Read and Create access to CSATs.



Custom Object Permissions — CSATs: Read and Create

1. Grant Read and Create access to Survey Answer and Survey Config as well.

2. Click Save.

Survey Answer ☒ ☒ ☐ Template Questions ☐ ☐ ☐

Survey Config ☒ ☒ ☐

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Enable different Experience Cloud login policies for employees.

Separate Experience Cloud site and Salesforce login authentication for employees. ☐

Relax login IP restrictions ☐

Skip employee device activation during Experience Cloud site login ☐

Allow OAuth for employees ☐

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets ☐

Require a minimum 1 day password lifetime ☐

Don't immediately expire links in forgot password emails ☐

Custom Object Permissions — Survey Answer and Survey Config: Read and Create, then Save

Custom Object Permissions									
	Basic Access				Data Administration				
	Read	Create	Edit	Delete	View All Records i	Modify All Records i	View All Fields		
CSATs	☒	☒					☐		
Question Banks	☒						☐		
Survey Answer	☒	☒					☐		
Survey Config	☒	☒					☐		
Survey Reminder Templates	☒						☐		
Survey Templates	☒						☐		
Template Questions	☐						☐		

Session Settings

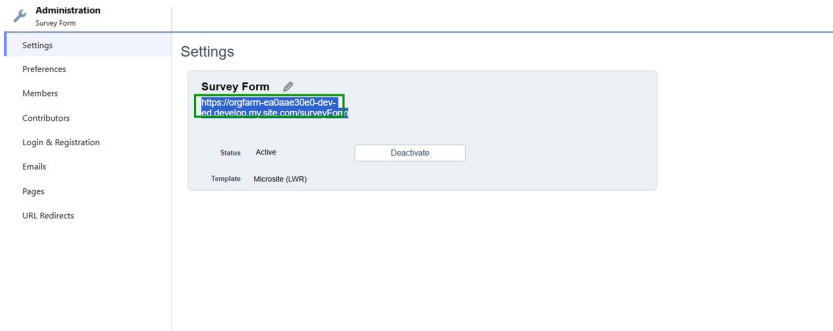
Custom Object Permissions — final state after Save (Basic Access and Data Administration for all custom objects)

7. Update Custom Metadata

7.1 Copy the Site URL

Before updating the survey configuration, copy the site's published URL from its Settings page.

1. From Administration > Settings, copy the site URL shown under the site name.

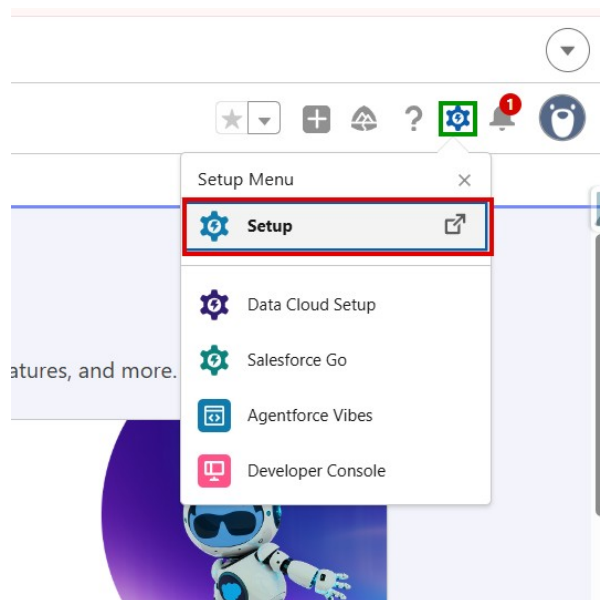


Settings — copy the site URL

7.2 CSAT Survey Configuration

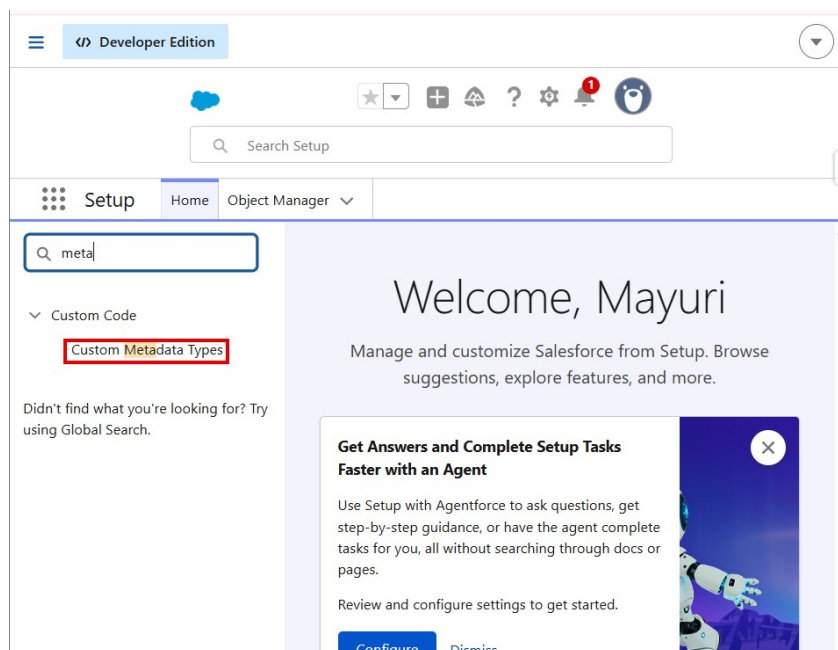
Point the survey configuration to the site's base URL so that survey links resolve correctly.

1. Click the Setup gear icon, then Setup.



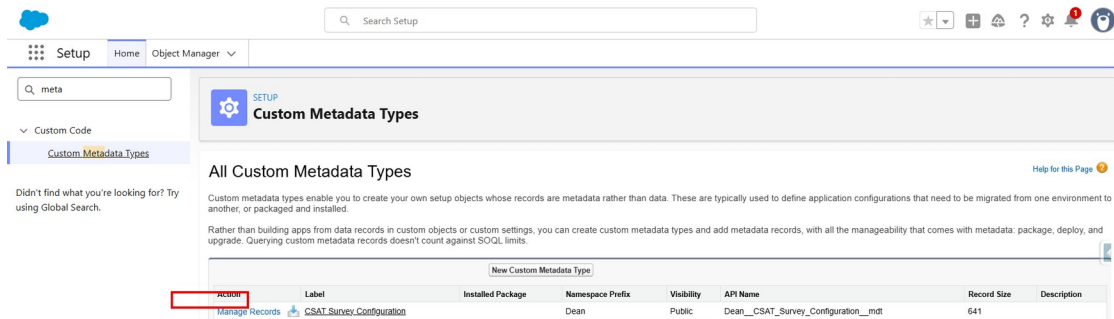
Setup Menu — click Setup

1. In the Quick Find box, search for custom metadata and select Custom Metadata Types.



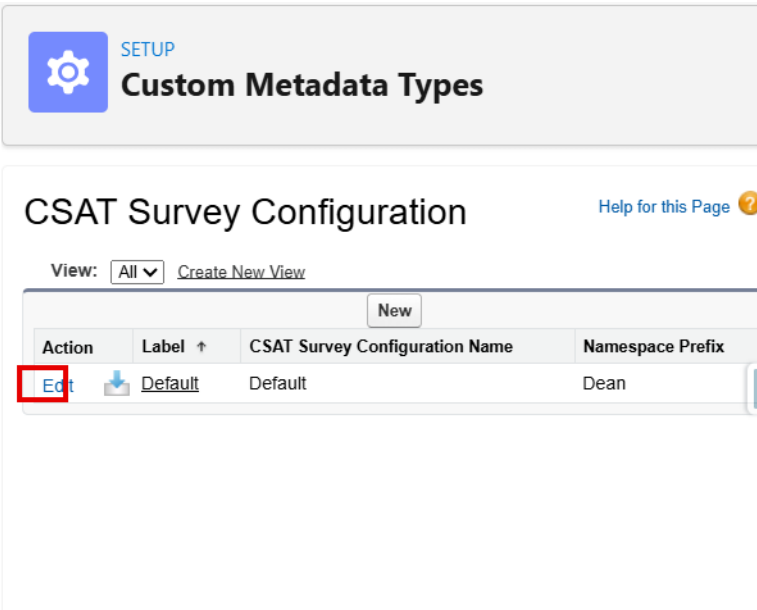
Setup — search "custom metadata"

1. On the All Custom Metadata Types list, find CSAT Survey Configuration and click Manage Records.



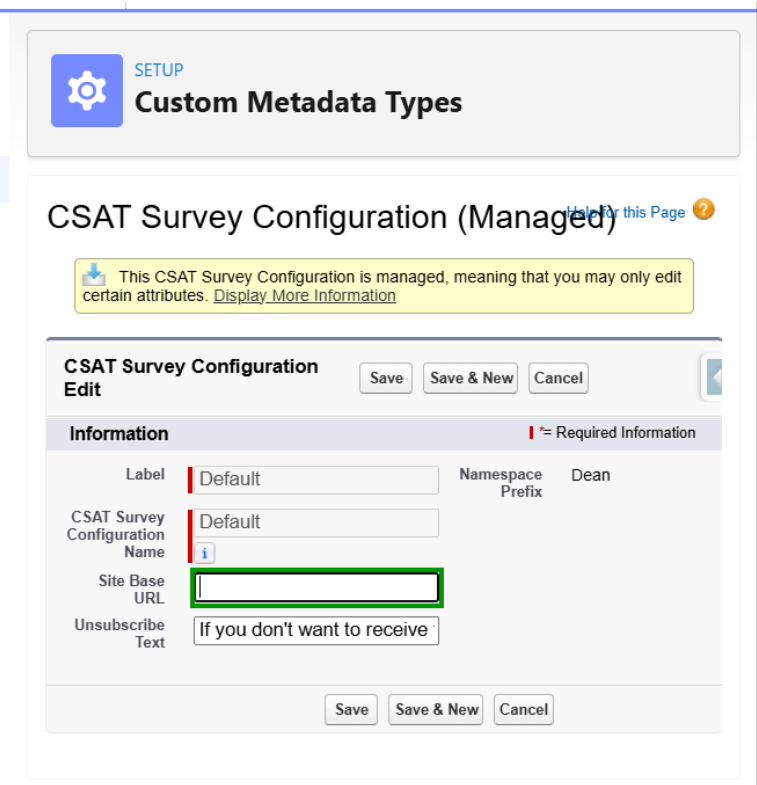
Custom Metadata Types — CSAT Survey Configuration

1. Click Edit next to the Default record.



CSAT Survey Configuration — click Edit on the Default record

1. Paste the site URL you copied earlier into the Site Base URL field.



CSAT Survey Configuration (Managed) — Site Base URL field

1. Confirm the Site Base URL is filled in, optionally update the Unsubscribe Text, then click Save.

Custom Metadata Types

CSAT Survey Configuration (Managed)

This CSAT Survey Configuration is managed, meaning that you may only edit certain attributes. [Display More Information](#)

CSAT Survey Configuration Edit

Save Save & New Cancel

Information

Label

Default

Namespace Prefix

Dean

CSAT Survey Configuration Name

Default

Site Base URL

op.my.site.com/surveyForm

Unsubscribe Text

If you don't want to receive

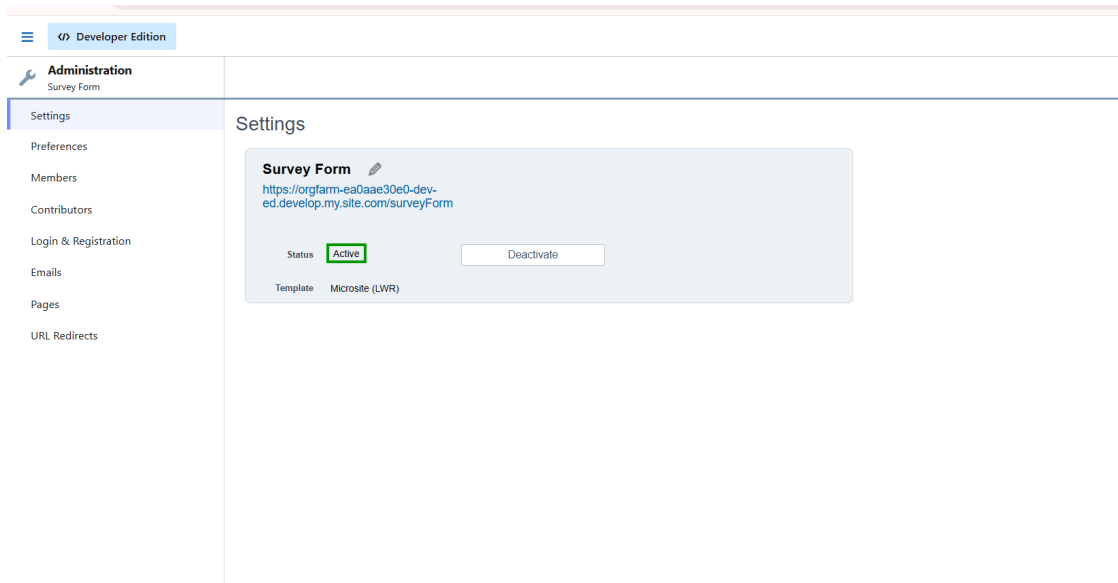
Save Save & New Cancel

CSAT Survey Configuration Edit — Site Base URL filled in, click Save

8. Verify the Site Is Active

Confirm the site status reflects Active before sending surveys.

1. Go to Administration > Settings for the site.
2. Confirm Status shows Active.



Site Settings — Status: Active

9. (Optional) Show Closed Case Statuses

If survey completion should be tracked against closed cases, enable closed status values on the Case Status field.

1. Go to Setup > Support Settings.
2. Check Show Closed Statuses in Case Status Field.
3. Click Save.

This makes closed picklist values available on the Status field on the Case object.

10. Schedule the Survey Batch Job

Schedule the Apex batch class that sends the CSAT survey so it runs automatically on the cadence you need.

10.1 Open the Schedule Apex Page

- 1. From Setup, enter Scheduled Jobs in the Quick Find box and select it under Environments > Jobs.
- 2. Click Schedule Apex to open the scheduling form shown below.

Schedule Apex — Job Name, Apex Class, and Schedule Using options

10.2 Name the Job and Select the Apex Class

- 1. Enter a Job Name, for example Daily Survey Batch.
- 2. Click the lookup icon next to Apex Class. A Lookup popup opens.
- 3. Select Batch_SendDynamicSurvey from the list.

Lookup popup — select Batch_SendDynamicSurvey

10.3 Configure the Schedule

Under Schedule Using, choose either Schedule Builder or Cron Expression.

If you select Schedule Builder:

1. Choose Frequency: Weekly or Monthly.
2. For Weekly, check the days the job should run, for example Monday, Wednesday, and Thursday.
3. Set the Start and End dates, and a Preferred Start Time.

Schedule Using: ☒ Schedule Builder ☐ Cron Expression

Schedule Apex Execution

Frequency: ☒ Weekly ☐ Monthly

Recurs every week on:

- ☐ Sunday
- ☒ Monday
- ☐ Tuesday
- ☒ Wednesday
- ☒ Thursday
- ☐ Friday
- ☐ Saturday

Start: 20/08/2026 [20/08/2026]

End: 20/09/2026 [20/08/2026]

Preferred Start Time: 01:00 ▼

Exact start time will depend on job queue activity.

Schedule Builder — Weekly on Monday, Wednesday, Thursday; Start/End dates and Preferred Start Time

Weekly: the job runs every week on the days you selected — in this example Monday, Wednesday, and Thursday.

Start/End: the schedule only runs between the Start and End dates you enter.

Preferred Start Time: Salesforce attempts to start the job at this time; the exact start depends on job queue activity.

In simple terms: this configuration runs the Apex job every Monday, Wednesday, and Thursday at the preferred start time, within the date range you set.

If you select Cron Expression instead:

1. Select the Cron Expression radio button under Schedule Using.
2. Enter a valid cron expression in the Cron Expression field, then click Save.

 **Apex Classes**

Schedule Apex

Schedule an Apex class that implements the Schedulable interface to be automatically executed on a specified interval.

SaveCancel

Job Name

Daily Survey Batch

Apex Class

Batch_SendDynamicSurvey

Schedule Using

☐ Schedule Builder

☒ Cron Expression

Cron Expression

Exact start time will depend on job queue activity.

SaveCancel

Schedule Apex — Cron Expression selected, with Job Name and Apex Class already filled in

Use Cron Expression when you need finer control than Schedule Builder allows, such as a specific time of day or multiple runs per day. Decide the frequency and time the survey batch should run, then express it as a standard Salesforce cron string, for example a daily 2:00 PM run or a weekly Monday/Wednesday/Friday 2:00 PM run each use a different cron expression.

10.4 Understanding the Cron Expression

A cron expression is a string of six fields — seconds, minutes, hour, day of month, month, and day of week — that together define exactly when the job runs. For example, 0 13 14 * * ? means:

- 0 → seconds = 0
- 13 → minutes = 13
- 14 → hour = 2 PM
- * → every day of the month
- * → every month
- ? → no specific day of week

So 0 13 14 * * ? means every day at 2:13 PM.

This means:

- 0 → seconds = 0
- 13 → minutes = 13
- 14 → hour = 2 PM
- * → every day of the month
- * → every month
- ? → no specific day of week

So 0 13 14 * * ? = every day at 2:13 PM.

Examples

What you want	Cron Expression
Every day at 9:00 AM	0 0 9 * * ?
Every day at 10:30 AM	0 30 10 * * ?
Every day at 2:00 PM	0 0 14 * * ?
Every day at 6:30 PM	0 30 18 * * ?
Every day at 11:45 PM	0 45 23 * * ?
Every Monday at 9:00 AM	0 0 9 ? * MON

Page 24

Cron expression reference — field breakdown and common examples

What you want	Cron Expression
Every day at 9:00 AM	0 0 9 * * ?
Every day at 10:30 AM	0 30 10 * * ?
Every day at 2:00 PM	0 0 14 * * ?
Every day at 6:30 PM	0 30 18 * * ?
Every day at 11:45 PM	0 45 23 * * ?
Every Monday at 9:00 AM	0 0 9 ? * MON
Every weekday at 9:00 AM	0 0 9 ? * MON-FRI

Summary

After completing all the steps above:

- The CSAT Survey Access permission set is assigned to the required users.
- Digital Experiences is enabled, and the Survey Form site is built and published.
- The site is Activated and publicly accessible to guest users.
- Guest users have Apex class access (Batch_SendDynamicSurvey, Batch_SendDynamicSurveyHandler, SurveyDynamicCtrl) and Read/Create access to CSATs, Survey Answer, and Survey Config.
- The CSAT Survey Configuration custom metadata points to the live site's Base URL.

If you get stuck at any step, look for the colored boxes in each screenshot — red always marks the button or field to click, and green marks a menu, icon, or status to notice.