

Service Request-Survey

User Manual

Version 1.0

27/Apr/2023

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1. Introduction

Salesforce is a powerful platform that helps organizations streamline their sales, marketing, and customer service processes.

The main goal of this project is to enable users to submit feedback, gather valuable insights, and identify areas where we can improve our support services. feedback is addressed and used to improve the overall support experience for our users.

This User Manual (UM) provides the information necessary for the Agent and user to effectively use the Service Request-Survey functionality.

Overview

The main purpose of this project is to get feedback from the user for provided services.

Utilized automation flows for sending emails to users, when a case is closed. Standard Salesforce functionality is used to convert survey form to link. The Survey link UI is developed in the Lightning web component.

Created apex class to capture the survey form data to store in custom object and restricts the user to submit the survey form a second time.

Automation flow is utilized to send notifications to agents when user submit the survey form.

Automation flow is utilized to send an email notification along with a survey link to the user when the user forgets to submit the survey form within four days.

A Trigger is utilized to give authority to the agent to reopen the case within a period of three days after its closure.

2. Getting Started

- A system that automatically sends an email to the user with a survey link when their case is closed.
- The user will be redirected to a survey page upon clicking the survey link.
- The survey page will allow the user to fill out a survey form and submit their responses.
- The survey response will be sent to the case owner for review.
- A system that automatically sends a reminder email notification to the user with a survey link when the user forgot to submit the survey form within four days.
- The agent has the authority to reopen the case within a period of three days after its closure.
- If the case is reopened, a Case Reopen Acknowledgment email will be sent to the case owner.
- Additionally, if the same case is closed again, the user will receive another email with the survey link and will be able to resubmit their response.

2.1 Attentions & Notices

- Salesforce Sign-in credential requires installing this package.

2.2 Installation

- Click on this link below and install the package.

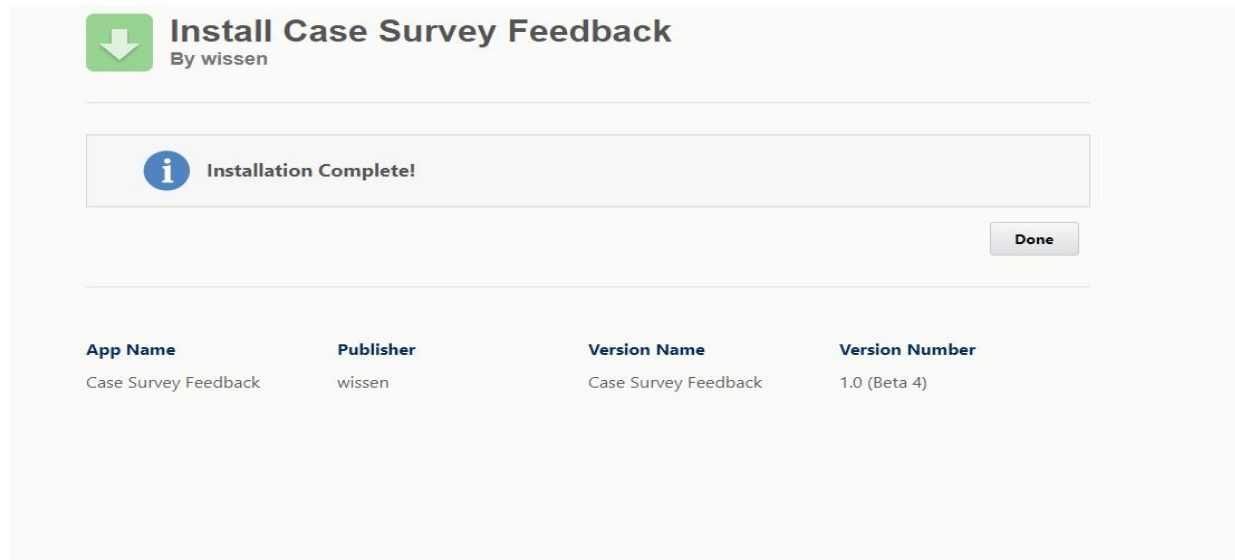
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5i000000dcNa>



App Name	Publisher	Version Name	Version Number
Case Management Actions	Software Engineer	Case Assignment Actions	1.0

[Additional Details](#) [View Components](#)

- Select Install for All Users and click on install.



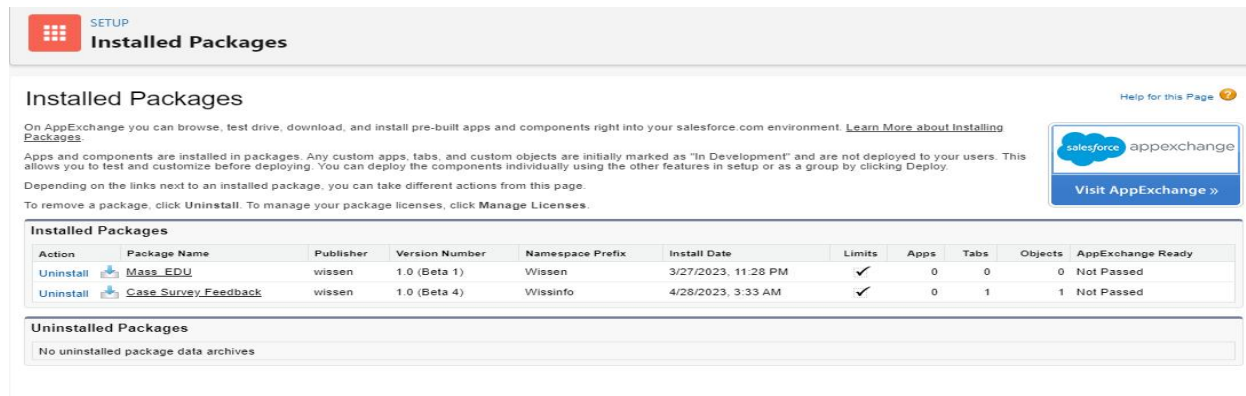
Install Case Survey Feedback
By wissen

Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
Case Survey Feedback	wissen	Case Survey Feedback	1.0 (Beta 4)

- After installing the package, we can see the package with the name [Case Survey Feedback](#) in Salesforce org as shown below.



Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Mass_EDU	wissen	1.0 (Beta 1)	Wissen	3/27/2023, 11:28 PM	✓	0	0	0	Not Passed
Uninstall	Case Survey Feedback	wissen	1.0 (Beta 4)	Wissinfo	4/28/2023, 3:33 AM	✓	0	1	1	Not Passed

Uninstalled Packages

No uninstalled package data archives

2.3 User Access Considerations

- User email addresses are accurate and up to date in the Salesforce system.

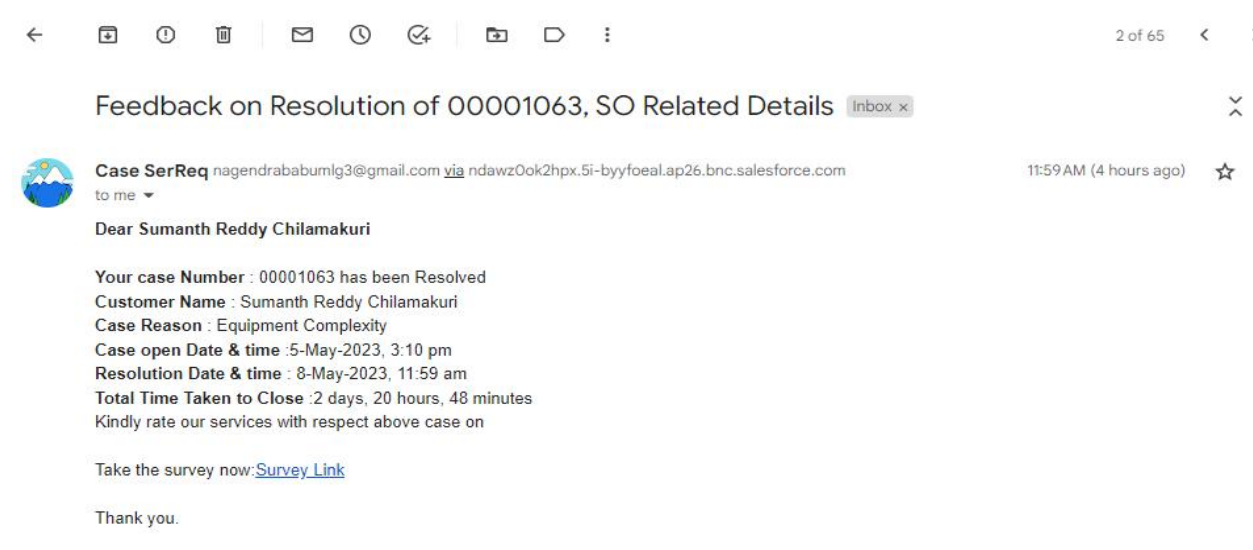
2.4 Accessing the System

- A Salesforce account is mandatory for all Agents to see the records created in Org.

2.5 System Organization & Navigation

Case is closed

- Auto email is sent to the user from salesforce when the case is closed.



- When the user clicks on the survey link in the email, The system redirects the user to the survey page.

Case Number
00001045

1. How satisfied are you with our Services?

- ☐ Very satisfied
- ☐ Somewhat satisfied
- ☐ Neutral
- ☐ Somewhat dissatisfied
- ☐ Very dissatisfied

2. Representative Communicate?

- ☐ Yes, always
- ☐ Yes, sometimes
- ☐ No, not really
- ☐ Not sure

3. Representative Nature?

- ☐ Very friendly and helpful
- ☐ Somewhat friendly and helpful
- ☐ Neutral
- ☐ Somewhat unfriendly and unhelpful
- ☐ Very unfriendly and unhelpful

4. Representative Understanding?

- ☐ Yes, completely
- ☐ Yes, partially
- ☐ No, not at all
- ☐ Not sure

5. Service Rating?

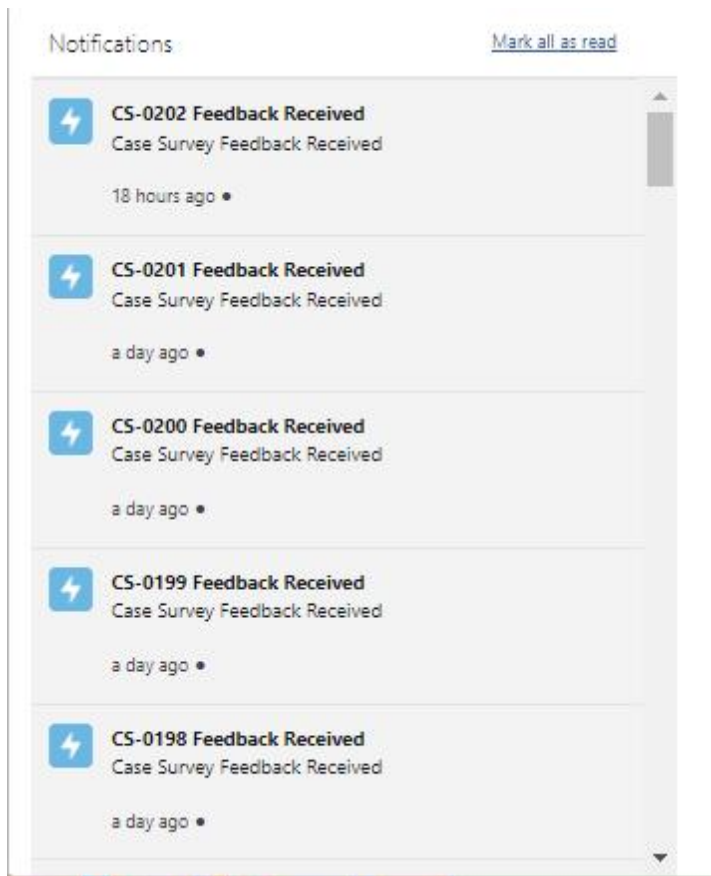
- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Poor

Any comments or suggestions (optional):

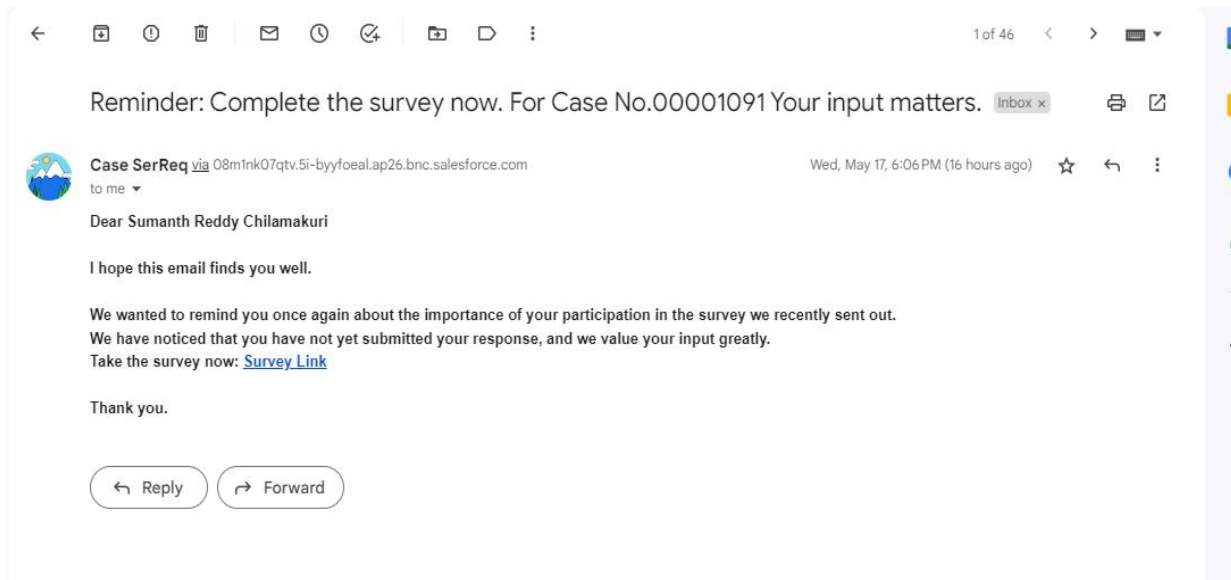
Overall Rating
★ ★ ★ ★ ★

Submit feedback

- The user fills out the survey form with the necessary information and submits it.
- Auto notification is sent to the agent when the user submits the survey form.



- In case the user forgets to submit the survey form within four days, a reminder email notification sends to the user along with the survey link.



Case is reopened:

- Once the case gets re-opened, the Case reopen acknowledgment email should go to the Case owner.

Case # 00001088 has been reopened Inbox x



Case SerReq via dq5dke4tln38.5i-byyfoeal.ap26.bnc.salesforce.com
to me ▾

Dear Sumanth Reddy Chilamakuri.

We wanted to let you know that Case # 00001088 has been reopened.

As a reminder, the details of the case are as follows:

Case Number: 00001088

Subject: Ac Installation

Status: Reopen

Description: We have Reopened your Case

If you have any questions or concerns, please do not hesitate to reach out to us.

Best regards,

- If the same Case gets Closed the survey link-related email should be delivered to the user and re-submission activity should be performed.



Case Closed 00001120, SO Related Details Inbox x



Case SerReq via h9swd3sqh22.5i-byyfoeal.ap26.bnc.salesforce.com
to me ▾

Dear Sumanth Reddy Chilamakuri

Your case Number : 00001120 has been Resolved

Customer Name : Sumanth Reddy Chilamakuri

Case Reason : Equipment Complexity

Case Reopen Date & time : 22-May-2023, 10:00 am

Second time Resolution Date & time : 22-May-2023, 10:05 am

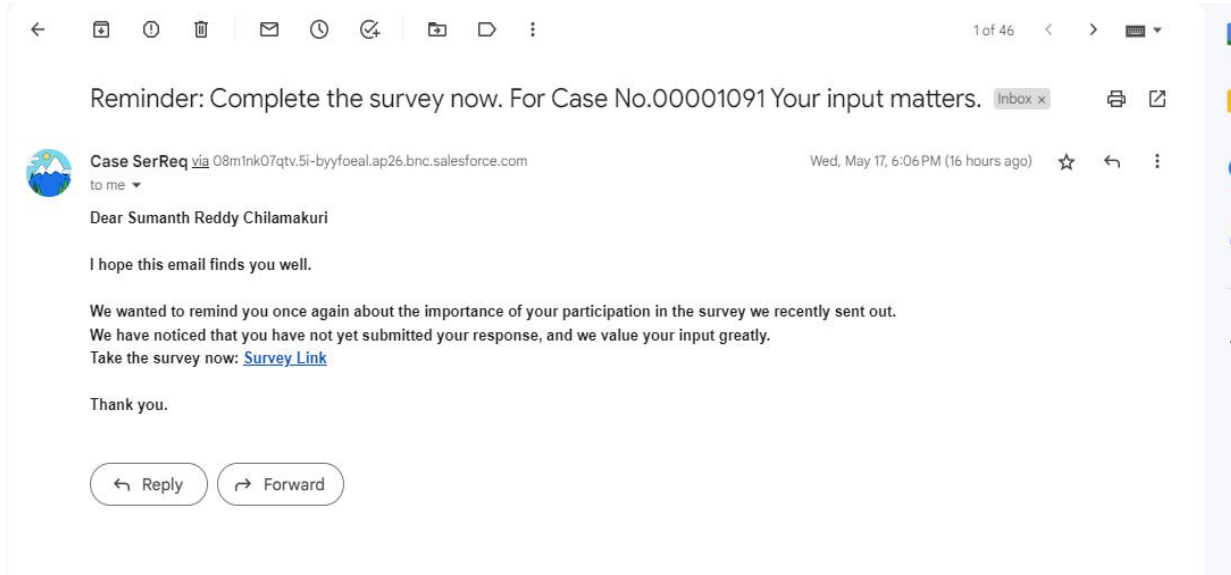
Total Time Taken to Re Close : 0 days, 0 hours, 5 minutes, 6 seconds

Kindly rate our services with respect above case on

Take the survey now: [Survey Link](#)

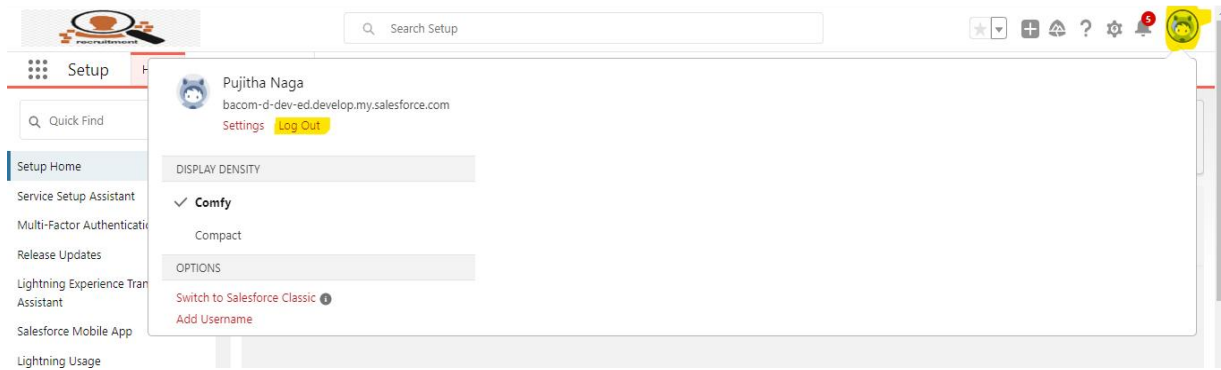
Thank you.

- In case the user forgets to submit the survey form within four days, a second reminder will be sent to the user with the survey link.

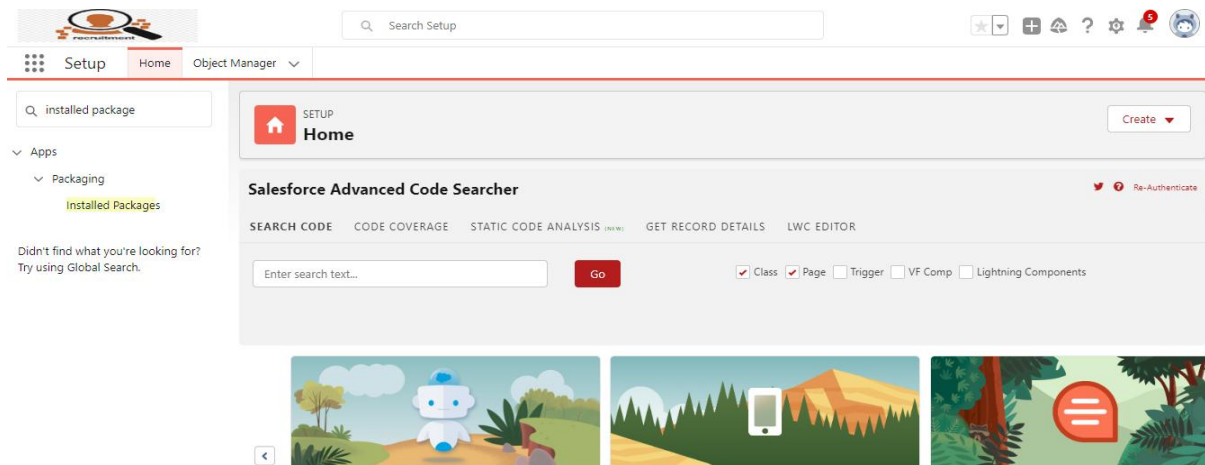


2.6 Exiting the System

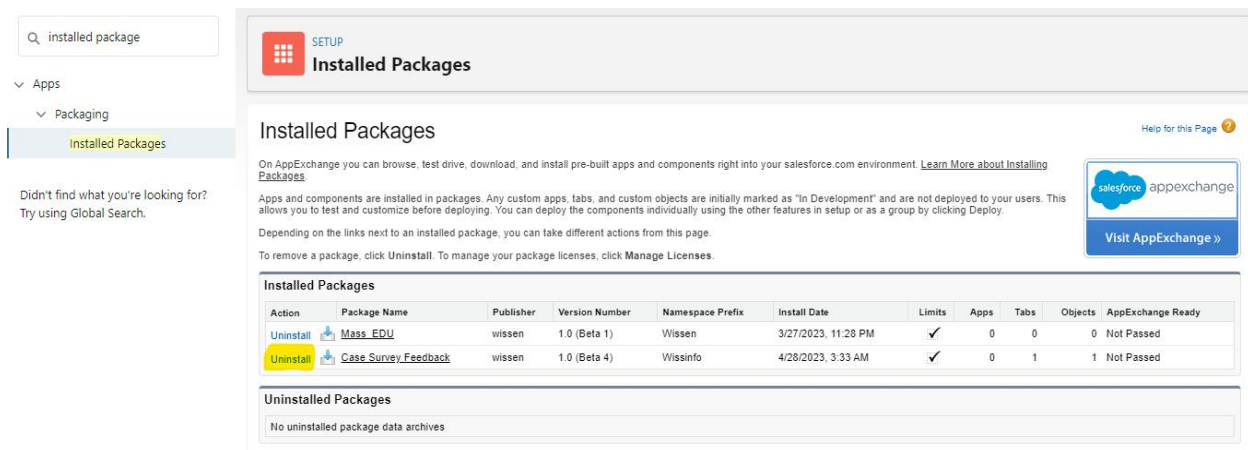
- If an Agent wants to log out from Salesforce, click on the bear icon, which is highlighted in the image below, and click on log out.



- To uninstall the package, enter installed packages in the quick find box and click on installed packages.



- Click the highlighted part to uninstall the package.



3. Post Installation, Troubleshooting & Support

- From Setup, enter Digital Experiences in the Quick Find box, then click on settings, then check whether the digital experience is enabled or not.

Settings

Experiences

Build pixel-perfect websites, portals, communities, and forums with Experience Cloud. [Learn More](#)

To start creating your sites, enable digital experiences.

☐ Enable Digital Experiences

After you enable digital experiences in your org, you must still create, configure, customize, and then activate a site before it's live and available to users.

- If not, enable digital experiences and click on the save button.

Settings

Experiences

Build pixel-perfect websites, portals, communities, and forums with Experience Cloud. [Learn More](#)

To start creating your sites, enable digital experiences.

☒ Enable Digital Experiences

After you enable digital experiences in your org, you must still create, configure, customize, and then activate a site before it's live and available to users.

Domain preview

Your org's My Domain name is the subdomain for any site that you create.

Your Experience Cloud sites domain
bacom-d-dev-ed.develop.my.site.com

Sample Experience URLs

- bacom-d-dev-ed.develop.my.site.com/customers
- bacom-d-dev-ed.develop.my.site.com/developers
- bacom-d-dev-ed.develop.my.site.com/partners

- Now click on the new button to create a new site.


SETUP

Digital Experiences

[Visit our Trailblazer Community Help for this Page](#)


Success! You can now create new Experience Cloud sites.

The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the [Digital Experience app in Lightning Experience](#) page to see your archived sites.

Maximum number of published and unpublished sites: 100

All Sites	New
No Sites	

- It will navigate to Choose the Experience You Love UI and click on Build Your Own (LWR).

[Back to Setup](#)

[Help & Training](#)

Choose the Experience You Love

Browse by:

[All](#) [Marketing](#) [Sales](#) [Service](#) [Commerce](#)

Microsite (LWR)

by Salesforce



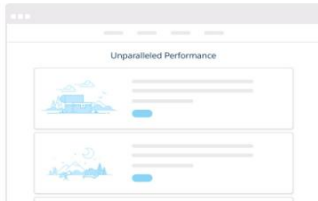
Enhanced

Simplified Lead Capture • Lightning-Fast Experience • Customizable Components

Available to Experience Cloud customers, deliver content-rich microsites that capture leads. Built on the Lightning Web...

Build Your Own (LWR)

by Salesforce



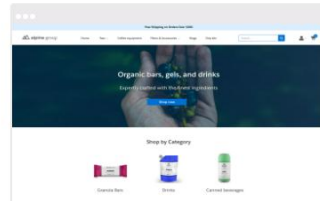
Enhanced

Unparalleled Performance • Standards-Based Customization •

Develop blazing fast digital experiences, such as websites, microsites, and portals, using the Lightning Web...

B2C Commerce (LWR)

by Salesforce

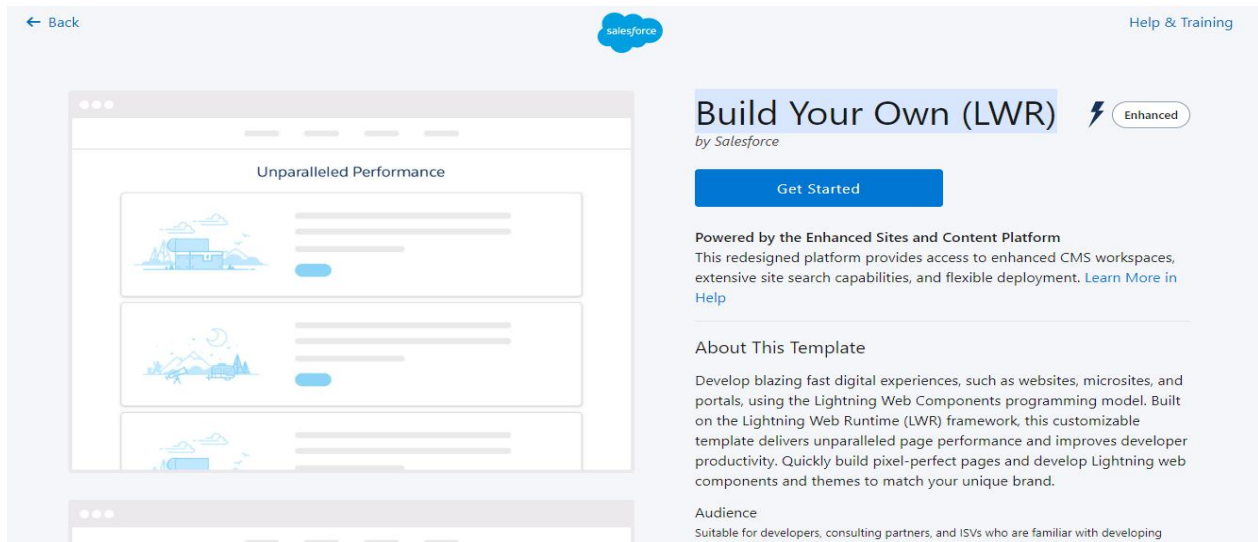


New

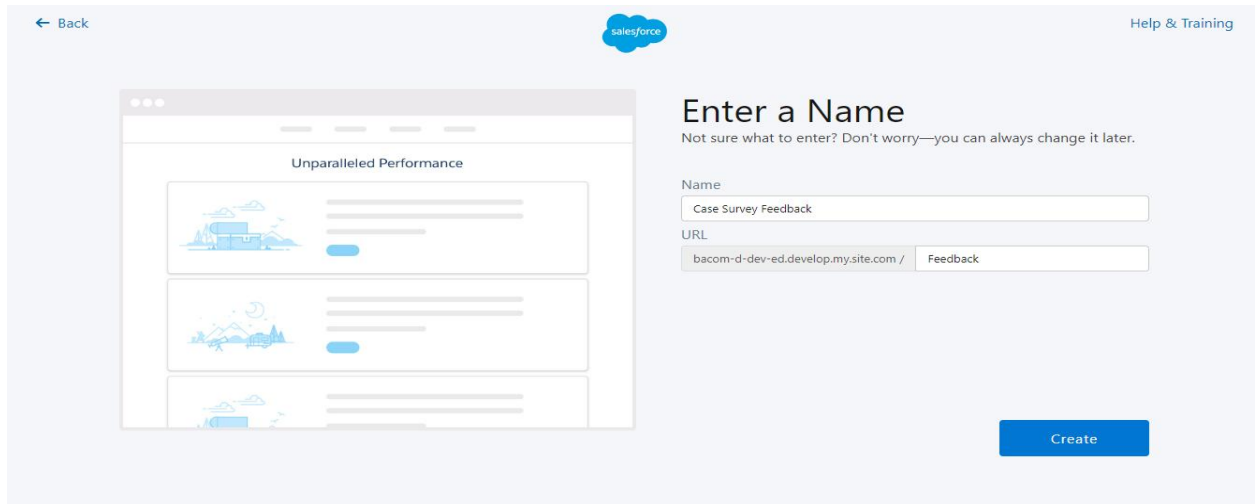
Live search • Product filtering • Einstein Product Recommendations •

Create a responsive ecommerce store that provides easy customization of store layout and template, configure...

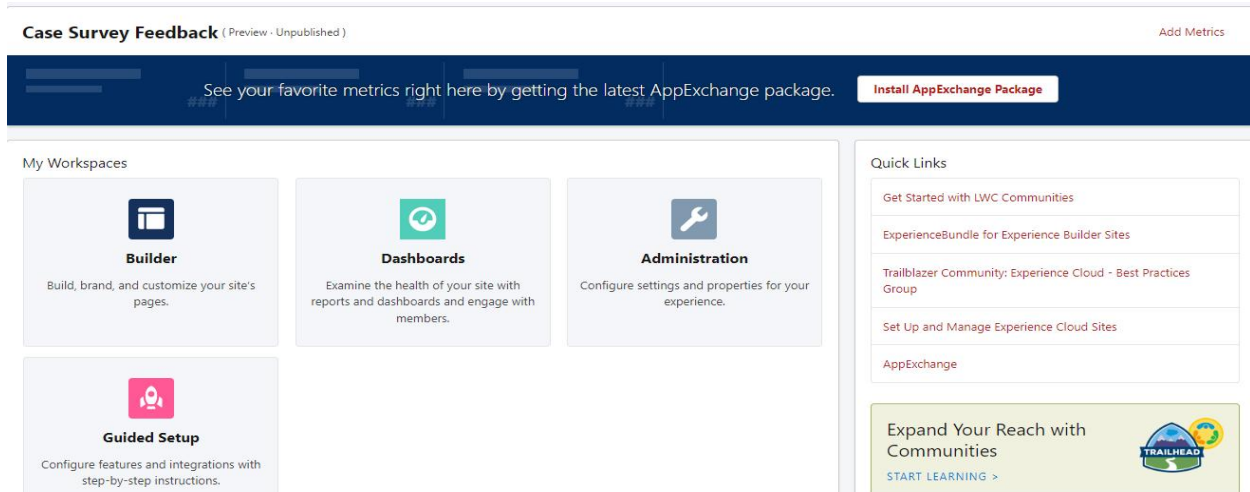
- Click on Build Your Own (LWR), it will navigate to another page here click on click on get started button.



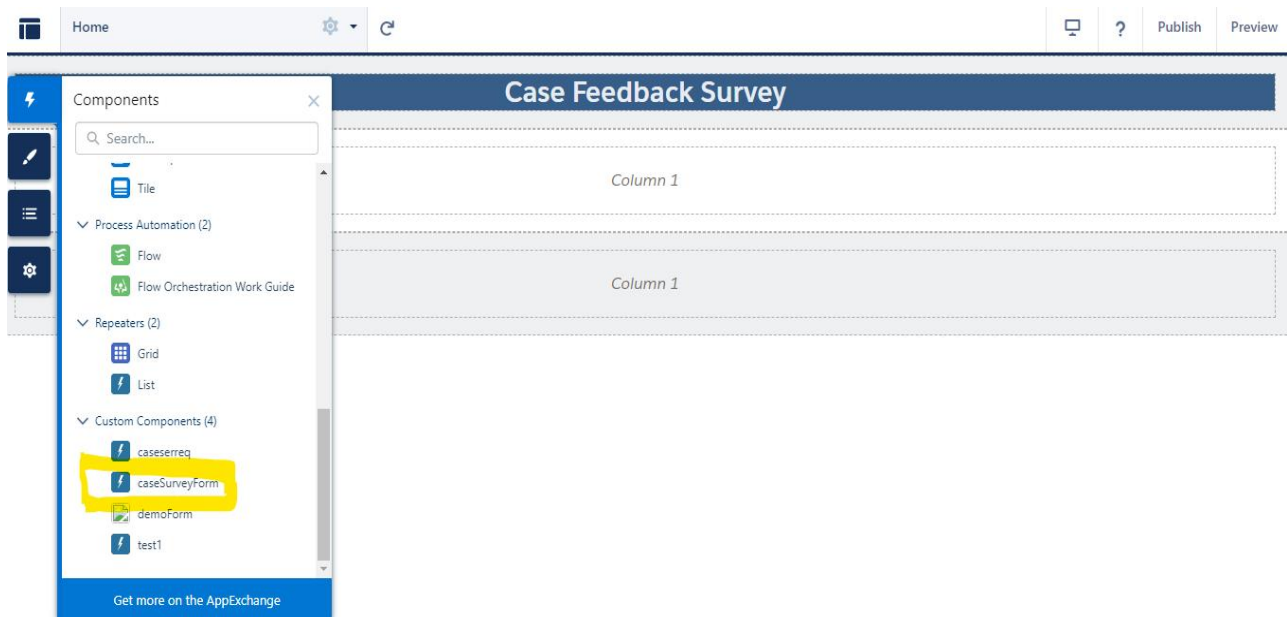
- It will navigate to another page, enter your name and URL and click on the create button.

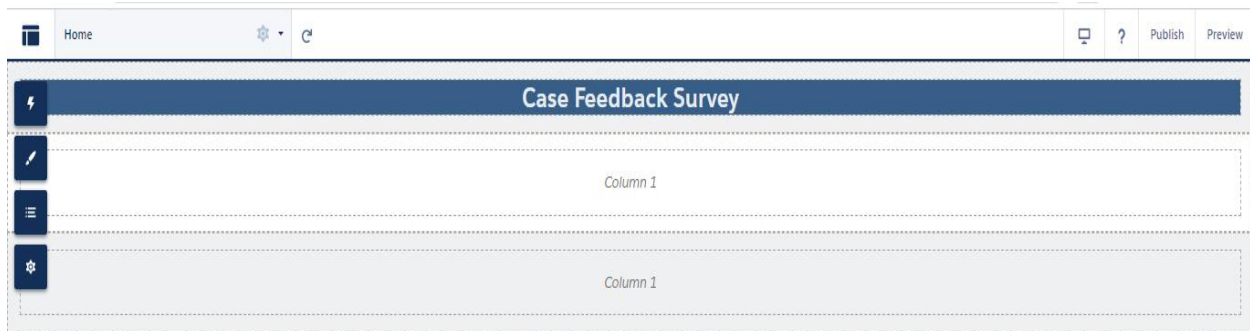


- The new site is created successfully, now click on the builder.

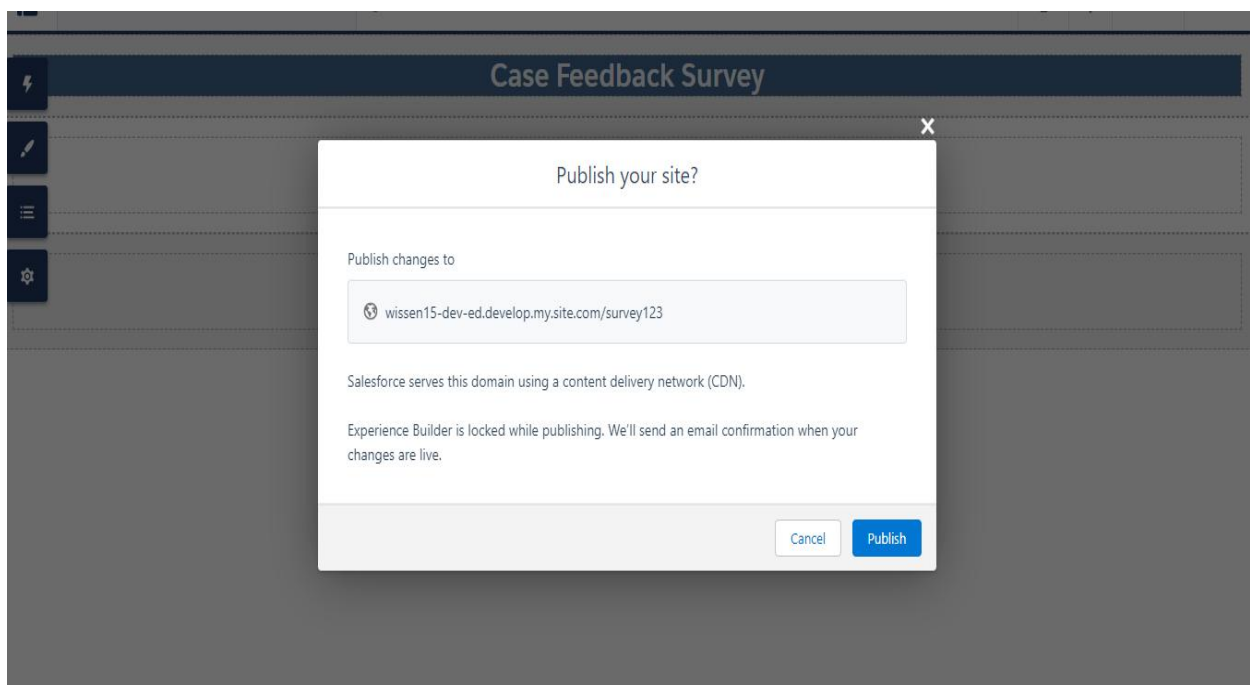


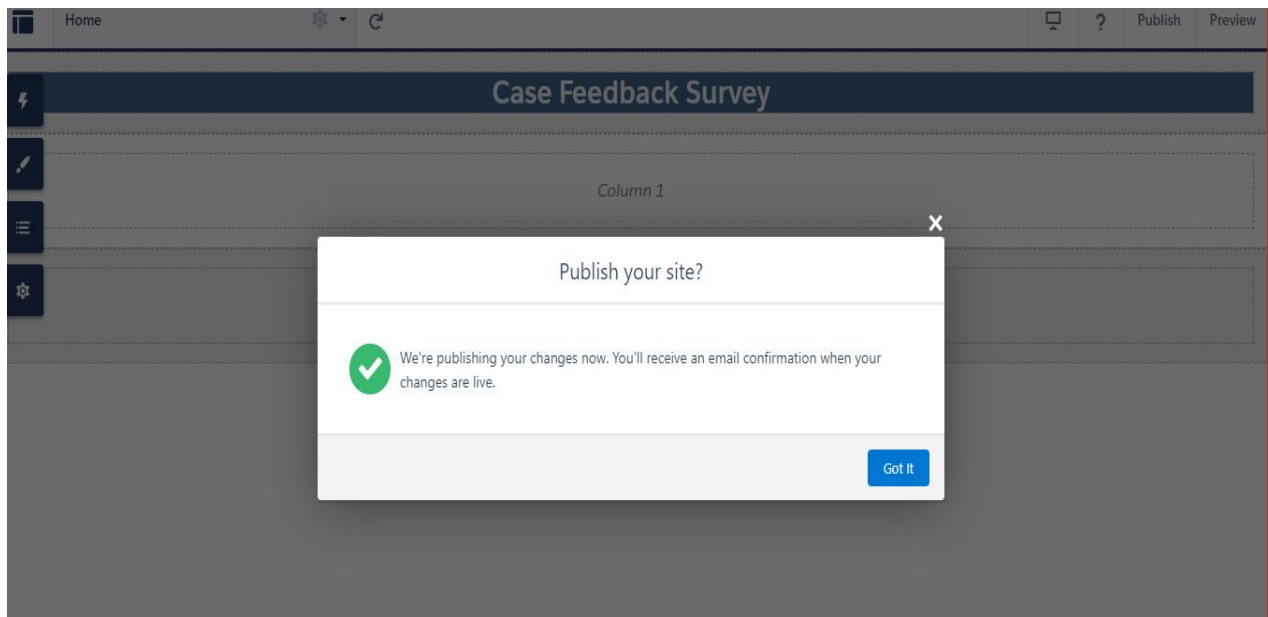
- It navigates to another page, here click on Components and select the custom **caseSurveyForm** component and drag and drop it. case feedback survey form is displayed.



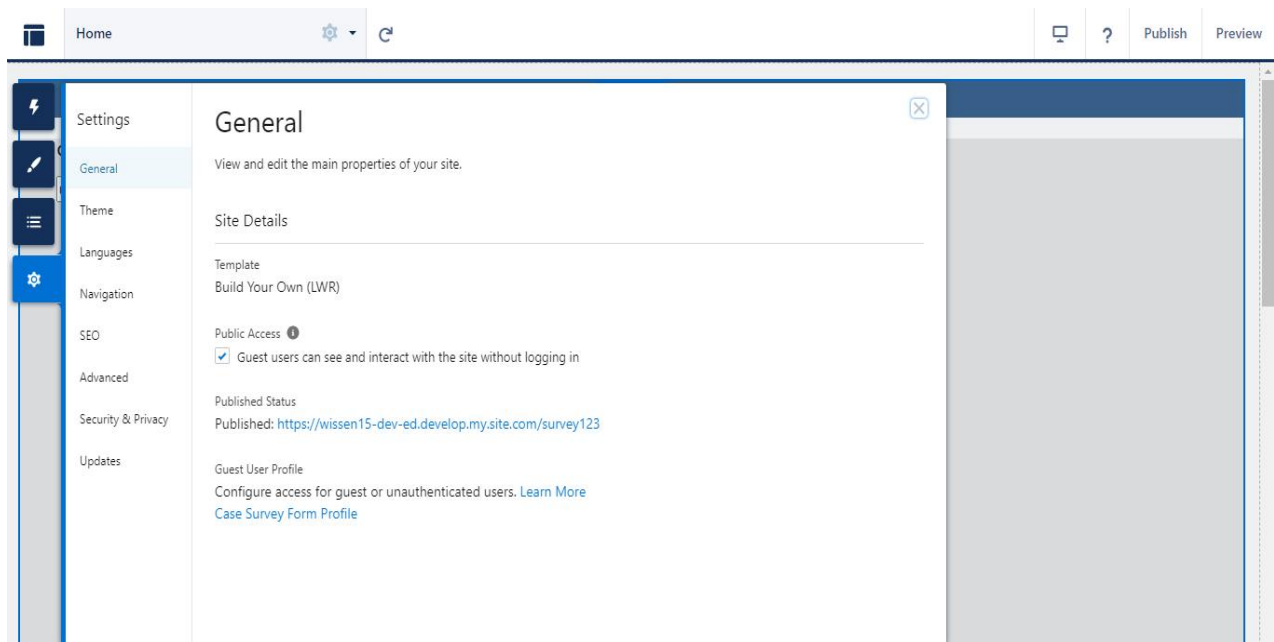


- Now click on the publish button. A pop-up message will display and click on Got it.





- To make the user access the survey form without login credentials, click on settings and go to general and enable the public access check box shown in the screenshot below.



- After publishing the site successfully, a new URL is created.

SETUP All Sites

Digital Experiences

Success! You can now create new Experience Cloud sites.

The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the [Digital Experience app](#) in Lightning Experience page to see your archived sites.
Maximum number of published and unpublished sites: 100

Action	Name	Description	Framework	URL	Status
Workspaces Builder	Case Survey Feedback		Lightning Web Runtime Enhanced	https://baicom-d-dev-ed.develop.my.site.com/Feedback	Preview

- From setup, enter Classic Email Templates in the Quick Find box, and click on classic email templates. now select the case survey folder.

SETUP Classic Email Templates

Case Survey

Classic Email Template Availability [Expand]

Folder: Case Survey Edit Create New Folder

Action	Email Template Name ↑	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	Case Reopen Mail	Custom	✓		CSeR	12/05/2023
Edit Del	Case Survey	Custom	✓		CSeR	16/05/2023
Edit Del	Case Survey Second form	Custom	✓		CSeR	19/05/2023
Edit Del	survey reminder	Custom	✓		CSeR	16/05/2023
Edit Del	survey reminder 2nd form	Custom	✓		CSeR	16/05/2023

- Click on the case survey email template and navigate to Custom Email Template of Case Survey, then click on the edit HTML version.

 **SETUP**
Classic Email Templates

Custom Email Template

Case Survey (Managed)

Help for this Page ?

Preview your email template below.

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

Email Template Detail

Edit Properties Edit HTML Version Edit Text Version Delete Clone

Email Templates from Salesforce	Case Survey	
Email Template Name	Case Survey	Available For Use ☒
Template Unique Name	Case_Survey	Last Used Date
Namespace Prefix	Wissinfo	Times Used
Installed Package	Case Survey Feedback	
Encoding	Unicode (UTF-8)	
Author	Pujitha Naga (Change)	
Description		
Created By	Pujitha Naga , 4/28/2023, 3:33 AM	Modified By Pujitha Naga , 4/28/2023, 3:33 AM

Edit Properties Edit HTML Version Edit Text Version Delete Clone

Email Template

Send Test and Verify Merge Fields

- It will navigate to the HTML Email Content page, past the site URL in the HTML body, and click on the save button.


SETUP
Classic Email Templates

HTML Email Content
! = Required Information

Subject

HTML Body

```

<b>Dear {!Contact Name}</b><br/><br/>
<b>Your case Number </b>                : {!Case.CaseNumber} has been Resolved<br/>
<b>Customer Name </b>                  : {!Contact Name}<br/>
<b>Case Reason </b>                    : {!Case.Reason}<br/>
<b>Case open Date & time</b>            : {!Case.Wissinfo__Test_Open_Date__c},
{!Case.Wissinfo__Case_Open_Time__c} <br/>
<b>Resolution Date & time </b>          : {!Case.Wissinfo__Test_Close_Date__c},
{!Case.Wissinfo__Case_Close_Time__c} <br/>
<b>Total Time Taken to Close </b>      : {!Case.Wissinfo__Time_taking_to_close__c}<br/>

Kindly rate our services with respect above case on<br/><br/>
Take the survey now.<a href="https://wissen15-dev-ed.develop.my.site.com/survey123/?
caseNumber={!Case.CaseNumber}&type=ClosedCase"target="_blank">Survey Link</a>
<br/><br/>

Thank you.

```


SETUP
All Sites

Digital Experiences
Visit our Trailblazer CommunityHelp for this Page

The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the [Digital Experience app in Lightning Experience](#) page to see your archived sites.

Maximum number of published and unpublished sites: 100

Action	Name	Description	Framework	URL	Status
Workspaces Builder	Case Survey Feedback		Lightning Web Runtime	https://ibacom-d-dev-ed.develop.my.site.com/Feedback	Preview

- Like the above way, we must add the URL for **Case Survey Second form**, **survey reminder**, **survey reminder 2nd form** email templates.

- To save the user response in the system, we must give the following permissions.
- Enter sites in the Quick Find box, then click on Case Survey Feedback.

SETUP Sites

`bacom-d-dev-ed.develop.my.salesforce-sites.com` → `bacom-d-dev-ed.develop.my.salesforce-sites.com/partners`

Your Salesforce site domain name is `bacom-d-dev-ed.develop.my.salesforce-sites.com`
[Salesforce Sites Terms and Conditions](#)

Settings

These settings affect all Salesforce sites.

☐ Allow using standard external profiles for self-registration, user creation, and login [i](#)

[Save](#) [Cancel](#)

Sites (bacom-d-dev-ed.develop.my.salesforce-sites.com) [New](#)

Action	Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By
	Case Survey Feedback (Experience)	https://bacom-d-dev-ed.develop.my.site.com/Feed...		✓	Community	Pujitha Naga, 4/28/2023, 4:23 AM

- It navigates to the Case Survey Feedback page, clicks on public access settings.

SETUP Sites

Site Details
Case Survey Feedback [Help for this Page](#)

« [Back to List: Sites](#)
« [Back to List: Experiences](#)

Site Detail [Edit](#) [Public Access Settings](#) [URL Redirects](#)

Site Label	Case Survey Feedback	Site Name	Case_Survey_Feedback
Site Contact	Pujitha Naga	Active Site Home Page	CommunitiesLanding (Preview)
Site Favorite Icon		Inactive Site Home Page	
Site Robots.txt		Site Template	
URL Rewriter Class		Clickjack Protection Level	Allow framing by the same origin only (Recommended)
Lightning Features for Guest Users	✓ i	Allow Access to Standard Salesforce Pages	✓ i
Enable Content Sniffing Protection	✓ i	Enable Browser Cross Site Scripting Protection	✓ i
Referrer URL Protection	✓ i	Allow only required cookies for this site	☐ i More Details
Guest Access to the Payments API	☐ i	Guest Access to the Support API	☐ i
Redirect to custom domain	☐ i	Cache public Visualforce pages	✓ i [More Info]
Self Registration Page	CommunitiesSelfReg (Preview)	Change Password Page	
Forgot Password Page		Created By	Pujitha Naga , 4/28/2023 4:23 AM
Last Modified By	Pujitha Naga , 4/28/2023 4:23 AM		

- To give permissions for guest users, click on enabled apex class access and click on the edit button.


SETUP
Profiles

Profile

Case Survey Feedback Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) |
 [Enabled Apex Class Access \[0\]](#) |
 [Enabled Visualforce Page Access \[16\]](#) |
 [Enabled External Data Source Access \[0\]](#) |
 [Enabled Named Credential Access \[0\]](#) |
 [Enabled Custom Metadata Type Access \[0\]](#) |
 [Enabled Custom Setting Definitions Access \[0\]](#) |
 [Enabled Flow Access \[0\]](#) |
 [Enabled Custom Permissions \[0\]](#)

Profile Detail
Edit
View Users

Name	Case Survey Feedback Profile		
User License	Guest User License	Custom Profile	☒
Description			
Created By	Pujitha Naga, 4/28/2023, 4:23 AM	Modified By	Pujitha Naga, 4/28/2023, 4:23 AM

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Order	Order Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Order Product	Order Product Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Payment Authorization	Payment Authorization Layout [View Assignment]

- Select the apex class in available apex classes and add it enabled apex classes by this user response will save into the system.



Enable Apex Class Access

Select the Visualforce pages that you want to make accessible at this Salesforce site.

SaveCancel

Available Apex Classes

CommunitiesLandingController
CommunitiesLoginController
CommunitiesSelfRegConfirmController
CommunitiesSelfRegController
ForgotPasswordController
LightningForgotPasswordController
LightningLoginFormController
LightningSelfRegisterController
MicrobatchSelfRegController
MyProfilePageController
SiteLoginController
SiteRegisterController
Wissen.AccountController
Wissinfo.caseserreq

Add

Remove

Enabled Apex Classes

--None--


SETUP
Profiles

Enable Apex Class Access

Select the Visualforce pages that you want to make accessible at this Salesforce site.

Save

Cancel

Available Apex Classes

ChangePasswordController
CommunitiesLandingController
CommunitiesLoginController
CommunitiesSelfRegConfirmController
CommunitiesSelfRegController
ForgotPasswordController
LightningForgotPasswordController
LightningLoginFormController
LightningSelfRegisterController
MicrobatchSelfRegController
MyProfilePageController
SiteLoginController
SiteRegisterController
Wissen.AccountController

Add

Remove

Enabled Apex Classes

Wissinfo.caseserreq

Object Level Permissions:

- To give permissions for standard and custom objects click on the edit button.


SETUP
Profiles

Case Survey Feedback Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) |
 [Enabled Apex Class Access \[1\]](#) |
 [Enabled Visualforce Page Access \[16\]](#) |
 [Enabled External Data Source Access \[0\]](#) |
 [Enabled Named Credential Access \[0\]](#) |
 [Enabled Custom Metadata Type Access \[0\]](#) |
 [Enabled Custom Setting Definitions Access \[0\]](#) |
 [Enabled Flow Access \[0\]](#) |
 [Enabled Custom Permissions \[0\]](#)

Profile Detail

Edit

View Users

Name	Case Survey Feedback Profile		
User License	Guest User License	Custom Profile	☒
Description			
Created By	Pujitha Naga, 4/28/2023, 4:23 AM	Modified By	Pujitha Naga, 4/28/2023, 4:23 AM

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Order	Order Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Order Product	Order Product Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Payment Authorization	Payment Authorization Layout [View Assignment]

- Give read and create permission to standard case objects, click read and create a check boxes.

SETUP Profiles

requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and ad

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	☐	☐			i	i
Account Brands	☐					
Appointment Invitations	☐					
Appointment Topic Time Slots	☐					
Assets	☐	☐				
Background Operations	☐					
Business Brands	☐					
Campaigns	☐	☐				
Cases	☒	☒				
Communication Subscriptions	☐					
Communication Subscription Channel Types	☐					

- Give read and create permission to custom case survey object, click read and create a check boxes.

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
candidates	☐	☐				
Case Surveys	☒	☒				
Job Applications	☐	☐				
Job Portals	☐	☐				

Field-Level Permissions:

- Give Field-Level Security for both custom and standard objects.

SETUP

Case Field-Level Security for profile
Case Survey Feedback Profile [Help for this Page](#)

[Edit](#)
[Back to Profile](#)

Field Name	Field Type	Read Access	Edit Access
Account Name	Lookup	☒	☐
Asset	Lookup	☒	☒
Business Hours	Lookup	☐	☐
Case Closed Date/Time	Date/Time	☒	☐
Case Number	Auto Number	☒	☐
Case Open Date/Time	Date/Time	☒	☐
Case Origin	Picklist	☒	☒
Case Owner	Lookup	☒	☒
Case Reason	Picklist	☒	☒
Case Source	Lookup	☒	☒
Closed When Created	Checkbox	☐	☐
Contact Email	Email	☒	☐
Contact Fax	Phone	☒	☐

SETUP

Case Survey Field-Level Security for profile
Help for this Page

Case Survey Feedback Profile

Edit Back to Profile

Field Name	Field Type	Read Access	Edit Access
AdditionalComments	Long Text Area	✓	✓
Case	Lookup	✓	✓
Case Number	Text	✓	✓
Case Survey Name	Auto Number	✓	☐
Created By	Lookup	✓	☐
Last Modified By	Lookup	✓	☐
OutcomeSatisfaction	Picklist	✓	✓
Overall Rating	Text	✓	✓
Owner	Lookup	✓	✓
RepresentativeCommunicate	Picklist	✓	✓
RepresentativeNature	Picklist	✓	✓
RepresentativeUnderstanding	Picklist	✓	✓
ServiceRating	Picklist	✓	✓

To restrict the user not to resubmit the survey form, follow the below steps:

- Enter Sharing settings in the Quick Find box, click on it.
- Default External Access of case survey is private, click on the edit button and make it public read/write and click on the save button.

Case Survey

Public Read/Write ▼

Public Read/Write ▼

✓

Now go to Case Survey Sharing Rule and click on new button.

Case Survey Sharing Rules
New Recalculate
Case Survey Sharing Rules Help ?

No sharing rules specified.

- In the Rule Name section enter Label and Rule Name.
- In Select your rule type, select Guest user access, based on criteria, and give the condition In select the user to share with the section you must select the user and click on the save button. A popup will appear now click on ok.

 **SETUP**

Sharing Settings

You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name

Label **feedback**

Rule Name **feedback** 

Description

Step 2: Select your rule type

Rule Type ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

Step 3: Select which records to be shared

 This sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these criteria, you're allowing immediate and unlimited access to all records matching these criteria to anyone accessing the site, even without logging in. To secure your site and its data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any exposure of your data to guest users related to this change from default settings.

Criteria	Field	Operator	Value	
	Owner ID	not equal to	Null	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

[Add Filter Logic...](#)

Additional Options ☐ Include records owned by high-volume users 

Step 4: Select the users to share with

Share with **Case Survey Feedback Site Guest User**

Step 5: Select the level of access for the users

Access Level **Read Only**

Save

Cancel

Search

Manager

...ed page at bacom-d-dev-ed.develop.my.salesforce.com says

The recalculation of sharing access will continue in the background. You'll receive an email notification upon completion. Do you want to continue?

OK

Cancel

 allowing immediate and unlimited access to all records matching these criteria to anyone accessing the site, even without logging in. To secure your site and its data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any exposure of your data to guest users related to this change from default settings.

Criteria	Field	Operator	Value	
	Owner ID	not equal to	Null	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

[Add Filter Logic...](#)

Additional Options ☐ Include records owned by high-volume users 

- In Setup go to object Manager and enter case in the quick find box.



SETUP

Object Manager

3 Items, Sorted by Label

case

Schema Builder

Create ▼

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Case	Case	Standard Object			
Case Related Issue	CaseRelatedIssue	Standard Object			
Case Survey	Wissinfo_Case_Survey__c	Custom Object		4/28/2023	✓

- Click on the case object and go to Fields & Relationships and enter the status in the quick find box.

 Case		Quick Find				New	Deleted Fields	Field Dependencies	Set History Tracking
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED					
Account Name	Accountid	Lookup(Account)		✓					
Asset	Assetid	Lookup(Asset)		✓					
Business Hours	BusinessHoursId	Lookup(Business Hours)							
Case Closed Date/Time	Wissinfo_Case_Closed_Date_Time__c	Formula (Date/Time)							
Case Number	CaseNumber	Auto Number		✓					
Case Open Date/Time	Wissinfo_Created_Date__c	Formula (Date/Time)							
Case Origin	Origin	Picklist							
Case Owner	Ownerid	Lookup(User,Group)		✓					

 Case		status				New	Deleted Fields	Field Dependencies	Set History Tracking
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED					
Milestone Status	MilestoneStatus	Text(30)							
Status	Status	Picklist		✓					

- Click on the status and go to the Case Status Picklist Values section and click on the new button.

Case Status Picklist Values							Case Status Picklist Values Help
New Reorder Replace Printable View Chart Colors							
Action	Values	API Name	Closed	Default	Chart Colors	Modified By	
Edit Deactivate	New	New	☐	☒	Assigned dynamically	Pujitha Naga , 1/10/2023, 1:38 AM	
Edit Del Deactivate	Working	Working	☐	☐	Assigned dynamically	Pujitha Naga , 1/10/2023, 1:38 AM	
Edit Del Deactivate	Escalated	Escalated	☐	☐	Assigned dynamically	Pujitha Naga , 1/10/2023, 1:38 AM	
Edit Del Deactivate	Closed	Closed	☒	☐	Assigned dynamically	Pujitha Naga , 1/10/2023, 1:38 AM	

- Add Reopen value in the picklist and click on the save button.

Add Picklist Values

Case Status

Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.

If a value matches an inactive value's API name, that value is reactivated with its previous label.

If a value matches an inactive value's label but not the API name, a new value is created.

Reopen

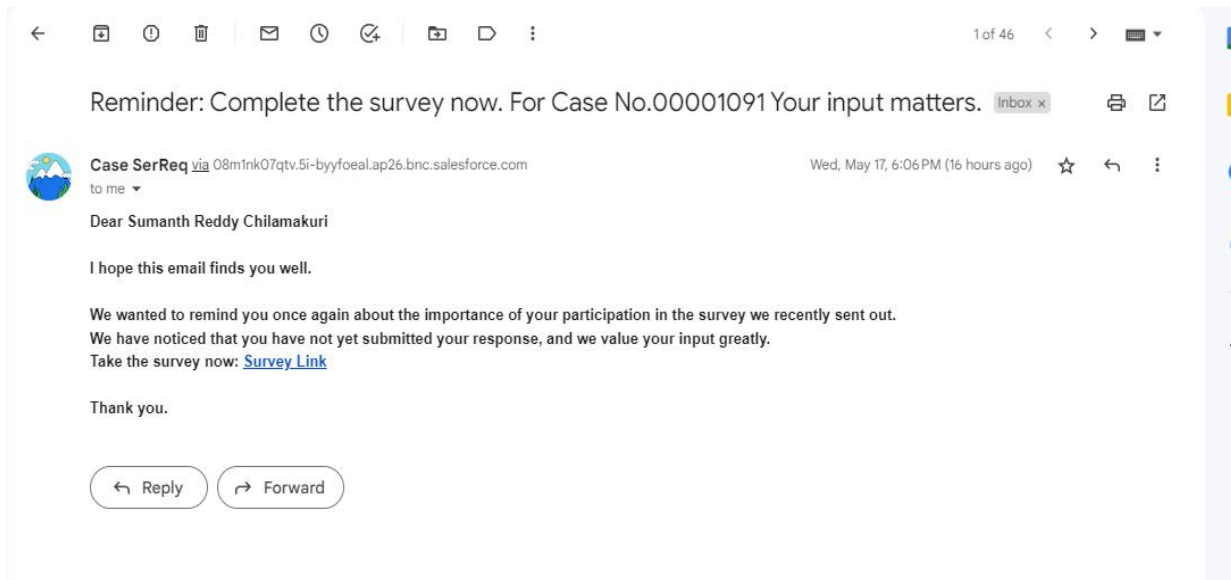
[Save](#)
[Cancel](#)

3.1 Error Messages

N/A

3.2 Special Considerations

- In case the user forgets to submit the survey form within four days, a reminder email notification sends to the user along with the survey link.



3.3 Support

The Agent can get emergency assistance and system support.

Table 1 - Support Points of Contact

Contact	Organization	Phone	Email	Role
Srihari R	Wissen Infotech	8867796840	srihari.ravindranath@wisseninfotech.com	PM
Shalini M	Wissen Infotech	8897272195	shalini.muthyam@wisseninfotech.com	PM
Vanithadevi K S	Wissen Infotech	6374103872	vanithadevi.subramanian@wisseninfotech.com	PM
Tabassum Parveen	Wissen Infotech	9121983889	tabassum.parveen@wisseninfotech.com	Lead

Appendix A: Approvals

The undersigned acknowledge that they have reviewed the User Manual and agree with the information presented within this document. Changes to this User Manual will be coordinated with, and approved by, the undersigned, or their designated representatives.

Table 1 - Approvals

Document Approved By	Date Approved
..... Obula Reddy Yerasi, Associate Vice President, Wissen Infotech	
..... Srihari R, Project Manager, Wissen Infotech	
..... Vanithadevi S, Program Manager, Wissen Infotech	
..... Tabassum Parveen, Lead, Wissen InfoTech	