

Sending a CSAT Survey on Project Completion

Automated CSAT Survey App — Campaign Use Case

Use Case: Notify a group of new users once a project is marked complete

Object Used: Campaign

Key Concept: Date-field trigger — the survey is sent on whatever date you set

Technology: Salesforce Sales Cloud, Service Cloud & Experience Cloud

The Scenario

A project has just been completed, and there are **20 new users** who should receive a satisfaction survey. They are not tied to a single Case or Opportunity — they're a group of people connected to one event (the project finishing). This is exactly what the **Campaign** object in the CSAT app is built for.

i The One Rule to Remember

! Every survey trigger is controlled by a **single field on the record** (Campaign, Case, or Opportunity). This field must always be a **Date field** — nothing else.

The batch job checks that field every day. **If the field's value equals today's date, the survey is sent that day.** If the date is in the future, nothing happens yet. If it's left blank, no survey goes out at all.

⚠ Simple way to explain it to any client

"Whatever date you put in that field is the date the survey will go out."

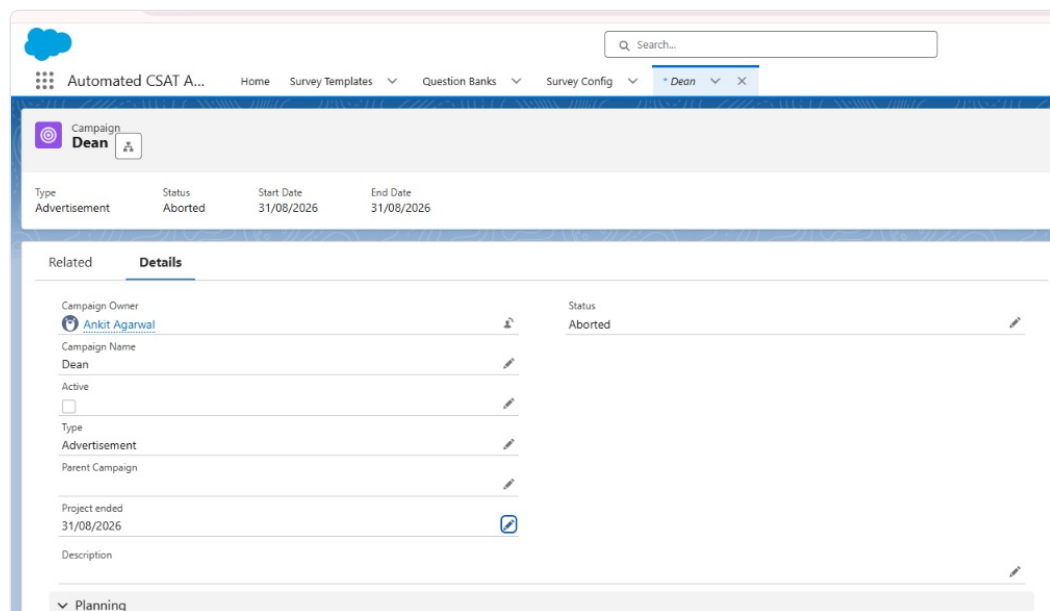
Want it sent **today**? Set the field to `today's date`.

Want it sent **next Monday**? Set the field to `next Monday's date` — and it will fire automatically that morning, with zero manual effort.

Field Value Set To	What Happens
Today's date	✓ Survey sends today
A future date (e.g. next week)	Waits — sends automatically on that date
A past date	Will not go out (date has already passed)
Blank / empty	✗ No survey sent

Step-by-Step: Sending the Survey to 20 New Users

- 1 **Create (or open) the Campaign** that represents the completed project — e.g. "Dean – Project Go-Live Feedback."
- 2 **Set the trigger date field** on the Campaign (e.g. *Project Ended*) to **today's date** — this is what tells the system "send the survey now."
- 3 **Add all 20 users as Campaign Members** using *Add Contacts* (or *Add Leads*) — each one added here will receive the survey.
- 4 **Confirm the Survey Config** linked to this Campaign already points to the correct **Survey Template** and question set — this only needs to be set up once and can be reused for future projects.
- 5 **The batch runs automatically** — no manual "Send" button needed. Since the date field equals today, all 20 members receive the survey email that day, and reminders + reporting kick in automatically.



Type	Status	Start Date	End Date
Advertisement	Aborted	31/08/2026	31/08/2026

Related

Details

Campaign Owner

Ankit Agarwal

Status

Aborted

Campaign Name

Dean

Active

☐

Type

Advertisement

Parent Campaign

Project ended

31/08/2026

Description

The Campaign's date field ("Project ended") — set this to today to send the survey today.

The screenshot shows the 'Campaign Dean' interface. It includes sections for 'Survey Response Name' with a list of SR-00004, SR-00005, and SR-00007, each with a dropdown arrow and a 'View All' link. Below this is 'Campaign Hierarchy (0)', 'Opportunities (0)' with a 'New' button, and 'Attachments (0)' with an 'Upload Files' button. The 'Campaign Members (1)' section has 'Add Leads' and 'Add Contacts' buttons. It contains a table with columns: Type, Status, Name, and Title. The table has one row: Contact, Sent, Mayuri Nimbalkar, and a dropdown arrow. A 'View All' link is at the bottom.

Type	Status	Name	Title
Contact	Sent	Mayuri Nimbalkar	

Campaign Members list — every Contact added here (via "Add Contacts") receives the survey. Add all 20 users here.

i What's Configured Behind the Scenes

This part is set up once by the admin, and then reused for every future project completion — the client never has to touch this part again.

The screenshot shows the 'Survey Config' record for SC-0005. It has two tabs: 'Related' and 'Details'. The 'Details' tab is active, showing 'Information' and 'System Information' sections. The 'Information' section includes fields for Survey Config Name (SC-0005), Object Type (Campaign), Trigger Event (Project_ended_c), Survey Template (Opportunity when Closed won Mixed Question), and Is Active (checked). The 'System Information' section includes Created By (Ankit Agarwal, 31/08/2026, 11:26 am) and Last Modified By (Ankit Agarwal, 04/09/2026, 2:10 pm).

Field	Value
Survey Config Name	SC-0005
Object Type	Campaign
Trigger Event	Project_ended_c
Survey Template	Opportunity when Closed won Mixed Question
Is Active	✓
Created By	Ankit Agarwal, 31/08/2026, 11:26 am
Last Modified By	Ankit Agarwal, 04/09/2026, 2:10 pm

Survey Config record: Object Type = Campaign, Trigger Event = the Date field to watch, and the Survey Template to send.

Survey Template & Question Bank

Automated CSAT A...

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

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)

Initial Survey email(Default)

Edit Template

Change Email Templates...

Survey Template — controls reminder count/interval and which questions appear.

Automated CSAT A...

Question Bank

How easy is the app to use?

Related Details

Information

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

Sort Order: 4

System Information

Created By: Ankit Agarwal

Last Modified By: Ankit Agarwal

Question Bank — each question (rating, scale, or text) linked to the template.

Same Logic, Different Object: Opportunity Close Date

The exact same date-field rule works directly on a standard Salesforce field — no Campaign needed. On an Opportunity, the trigger field can simply be **Close Date**. The moment a deal is marked **Closed Won** with today's Close Date, the CSAT survey goes out automatically — no admin step at all.

✓ **Object Type** = Opportunity → **Trigger Event** = Close Date → Survey Template = "Opportunity when Closed won Mixed Question." The rep just closes the deal as normal — the survey is a side effect of their everyday workflow, not an extra task.

The screenshot shows the 'Survey Config' page for 'SC-0000'. The 'Details' tab is active, showing the following configuration:

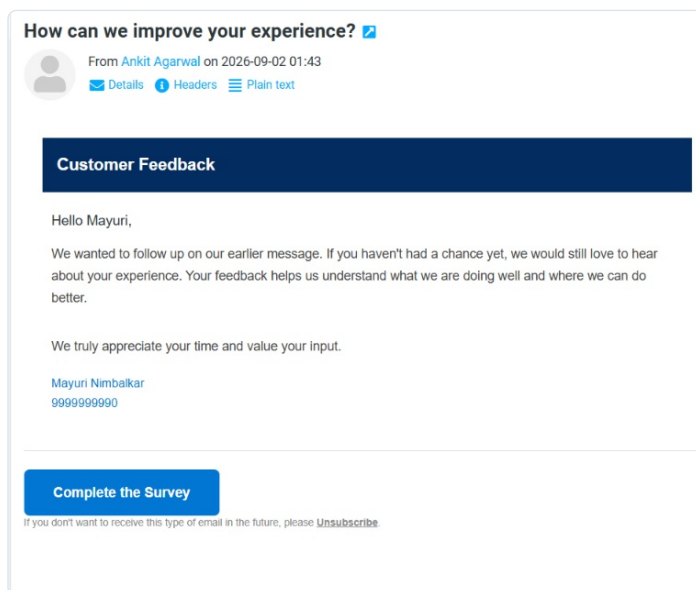
Field	Value	Action
Survey Config Name	SC-0000	
Object Type	Opportunity	Edit
Trigger Event	CloseDate	Edit
Survey Template	Opportunity when Closed won Mixed Question	Edit
Is Active	✓	Toggle

The owner is Ankit Agarwal.

Survey Config for Opportunity — Trigger Event is set to the standard Close Date field.

i The Reminder Email

If the customer hasn't responded, the app automatically follows up using the reminder cadence set on the Survey Template (Max Reminders / Reminder Interval Days) — no manual chasing needed.



Automatic reminder email sent to a customer who hasn't completed the survey yet.

What the Customer Sees, and How It's Tracked

deaninfotechpvtltd3.my.site.com/surveyForm/?sr=survey&srld=a15OS00000Ei8T9YAJ&type=OppClosedwon

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?

☐ 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

Clicking "Complete the Survey" opens the live form — hosted on Experience Cloud, no login required.

i Live Status on the Template Overview

The admin can open the Survey Template at any time and see exactly where every response stands — **Completed, Pending, or Unsubscribed** — without building a separate report.

Survey Template Overview tab — live counts plus a clickable list of every response.

Before You Start: Every Record Needs a Contact

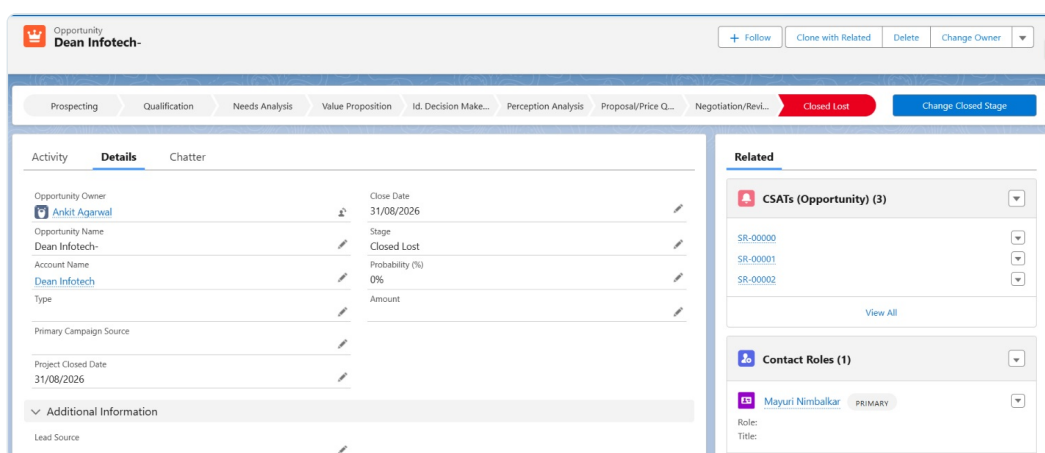
The survey email has to go *somewhere*. Before a Case, Opportunity, or Campaign can trigger a survey, it must already have a **Contact** attached — this is what supplies the recipient's name and email address.

⚠ Without a Contact, nothing sends

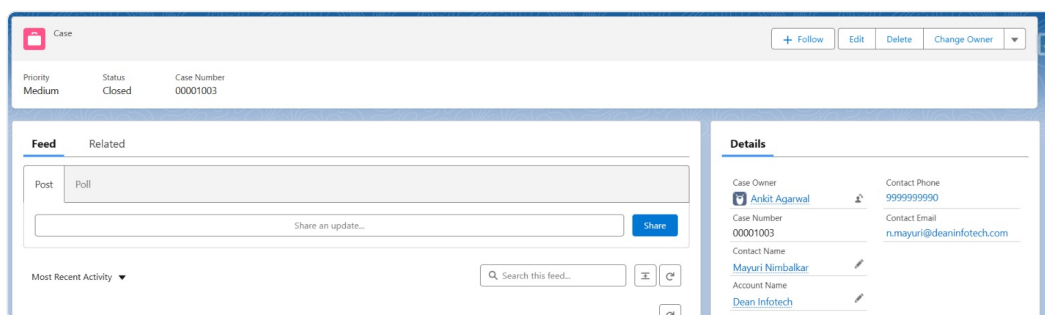
Opportunity → needs a **Contact Role** (usually marked "Primary") under the Contact Roles related list.

Case → needs the standard **Contact Name** field filled in on the Case record.

If either is missing, the batch has no address to send to and that record is simply skipped that day.



Opportunity with a Contact Role set (Mayuri Nimbalkar - Primary) — this is who receives the survey. Notice the CSATs related list on the right already showing 3 responses.

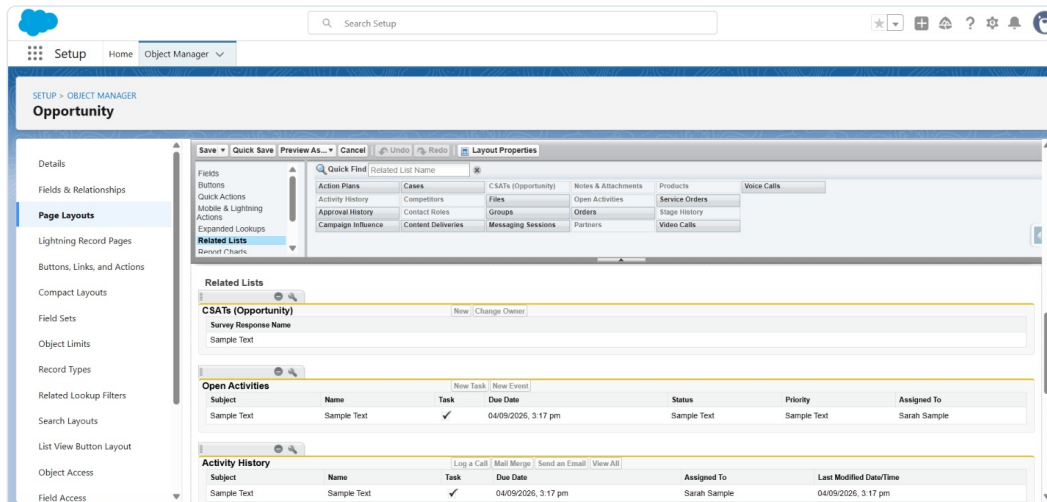


Case Details panel — Contact Name, Contact Phone, and Contact Email must be populated.

See Every Survey Right on the Record

Add the **CSATs** related list to the Case, Opportunity, and Campaign page layouts, so anyone opening the record can see every survey sent and its status — no separate report needed.

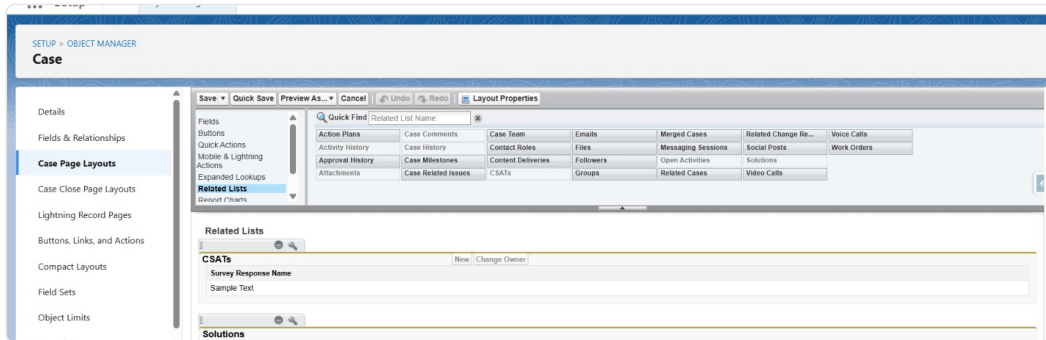
- ✓ **Setup → Object Manager → (Opportunity / Case / Campaign) → Page Layouts →** open the layout → go to the **Related Lists** palette → drag **CSATs** onto the layout → **Save**. This only needs to be done once per object, per layout.



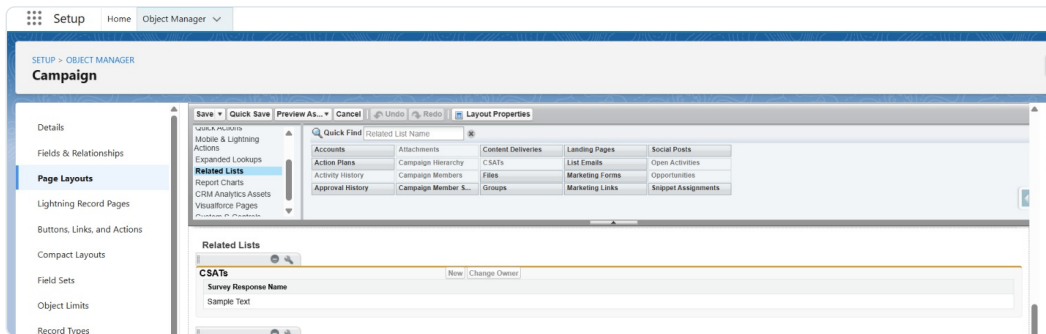
Opportunity Page Layout — "CSATs (Opportunity)" is available in the Related Lists palette, ready to drag onto the layout.

Same Setup for Case and Campaign

The identical related list is available on both Case and Campaign layouts — just repeat the same drag-and-drop.



Case Page Layout — "CSATs" available in the Related Lists palette.



Campaign Page Layout — "CSATs" available in the Related Lists palette.

Why Clients Like This

- No developer needed to send a one-off survey — an admin just adds members to a Campaign and sets one date field.
- The same date-field logic works identically for Opportunity and Case, so the client only has to learn the concept once.
- Surveys can be scheduled ahead of time simply by setting a future date — useful for planned project milestones.
- Reminders, unsubscribes, and completion tracking all happen automatically once the survey goes out.
- Everything rolls up into the existing Campaign Survey Dashboard — Sent, Completed, Unsubscribed, Outstanding.
- Once the CSATs related list is added to the layout, every survey response is visible right on the Case, Opportunity, or Campaign — no extra clicks to check status.

✓ Quick Recap

✓ **Campaign** = the group/event (e.g. "Project X Go-Live") → **Campaign Members** = the 20 people to survey → **Date field = today** = survey sends today.

✓ **Opportunity** = a single deal → **Close Date = today** → survey sends automatically the moment the deal is marked Closed Won — no extra step for the sales rep.