

SedSurvey Application Documentation

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1. Overview

SedSurvey is a Salesforce-native survey management application that enables organizations to create, send, automate, and analyze surveys directly inside Salesforce.

2. Installation

Install the SedSurvey managed package from the provided AppExchange or package link. After installation verify that the SedSurvey application, objects, Lightning Web Components, Apex classes, triggers, and navigation tabs are available.

3. Prerequisites

Before using SedSurvey you must complete the following configuration steps:

- Configure Org-Wide Email Address
- Configure Custom Settings
- Assign Permission Sets
- Activate Salesforce Site

4. Org-Wide Email Configuration

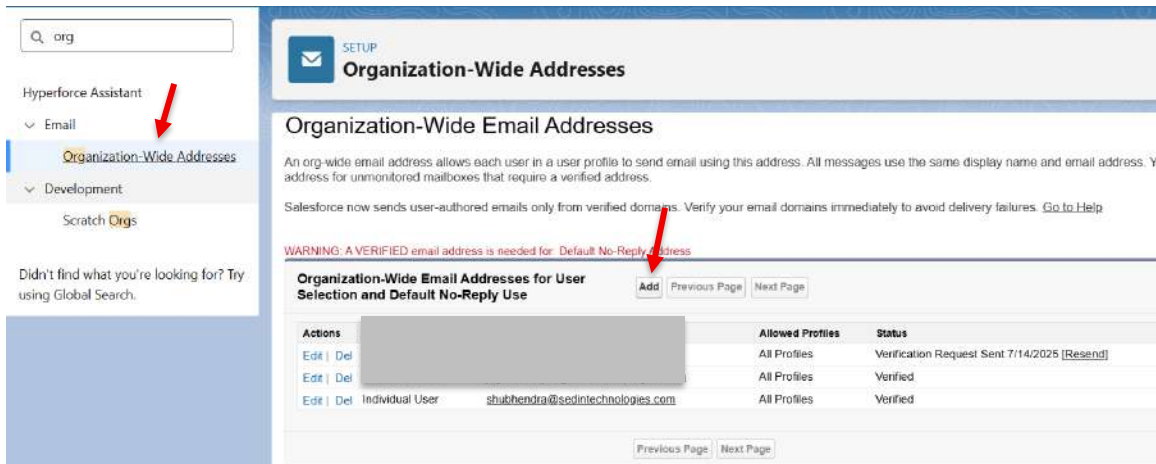
To send survey emails from SedSurvey, you must configure an Org-Wide Email Address in Salesforce. This email address will appear as the sender address when surveys are sent to recipients.

Steps to configure:

1. Go to Setup in Salesforce.
2. Search for Org-Wide Email Addresses in the Quick Find box.
3. Click Add.
4. Enter the Display Name and Email Address.
5. Click Save.
6. Salesforce will send a verification email to the provided address.
7. Open the email and click the verification link.
8. Once verified, the email address will appear in the From Address dropdown when sending surveys from SedSurvey.

Important:

- At least one verified Org-Wide Email Address must exist in the organization.
- If no verified address is available, SedSurvey will not allow sending surveys.



5. Email Deliverability & DKIM Configuration

To ensure that survey emails are delivered to recipients' inbox instead of spam, configure DKIM (DomainKeys Identified Mail) in Salesforce.

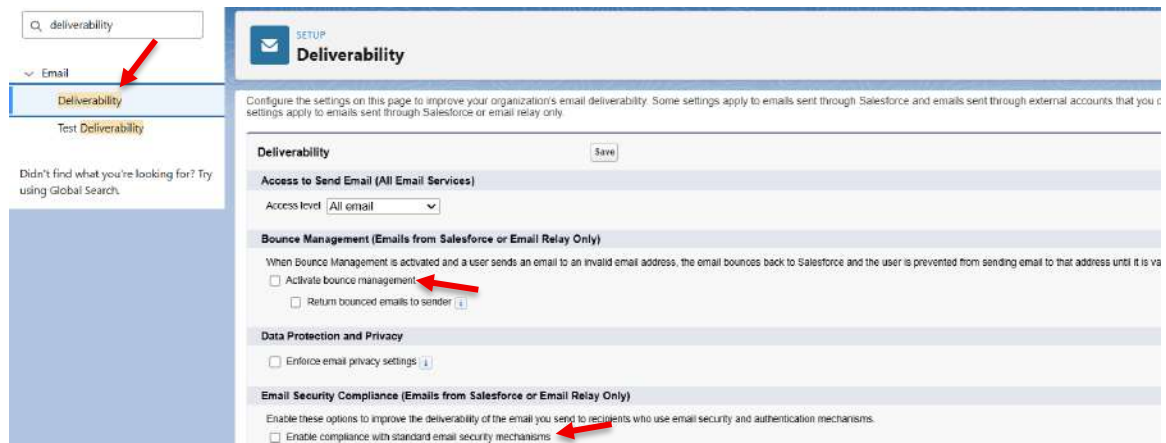
Steps:

1. Go to Setup → Search 'DKIM Keys'
2. Click 'Create New Key'
3. Enter Selector and Domain
4. Save and copy generated CNAME records
5. Add these records in your DNS provider (GoDaddy, AWS, etc.)
6. Return to Salesforce and click 'Activate'



After generating DKIM keys, ensure your IT team publishes the CNAME records in your DNS. This Salesforce-recommended setup verifies your domain and helps prevent emails from being marked as spam.

7. After DKIM Keys setup is done check Deliverability where Activate bounce management and Enable Compliance with standard email security mechanisms should be unchecked.



Q. deliverability

▼ Email

Deliverability

Test Deliverability

Didn't find what you're looking for? Try using Global Search.

SETUP Deliverability

Configure the settings on this page to improve your organization's email deliverability. Some settings apply to emails sent through Salesforce and emails sent through external accounts that you control. Settings apply to emails sent through Salesforce or email relay only.

Deliverability [Save]

Access to Send Email (All Email Services)

Access level: [All email]

Bounce Management (Emails from Salesforce or Email Relay Only)

When Bounce Management is activated and a user sends an email to an invalid email address, the email bounces back to Salesforce and the user is prevented from sending email to that address until it is validated.

☐ Activate bounce management

☐ Return bounced emails to sender

Data Protection and Privacy

☐ Enforce email privacy settings

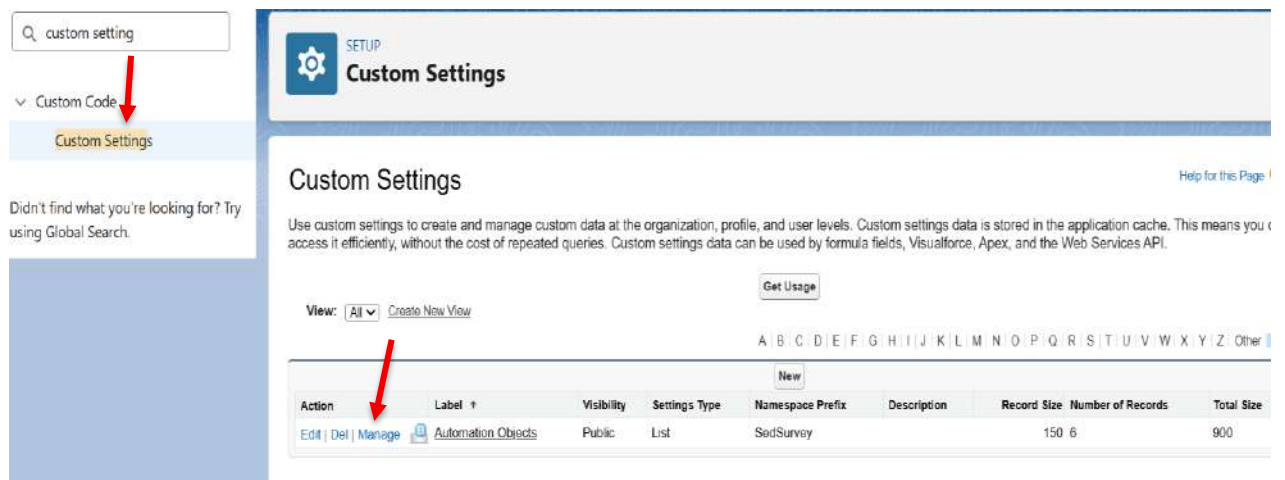
Email Security Compliance (Emails from Salesforce or Email Relay Only)

Enable these options to improve the deliverability of the email you send to recipients who use email security and authentication mechanisms.

☐ Enable compliance with standard email security mechanisms

6. Custom Settings Configuration

- Navigate to Setup → Custom Settings → SedSurvey_Automation_Objects_c → Manage.
Click on New and Add objects such as Contact, Lead, Case, or Opportunity that contain an **email field**.



Q. custom setting

▼ Custom Code

Custom Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Custom Settings

Custom Settings [Help for this Page](#)

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

View: [All] [Create New View](#) [Get Usage](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Edit Del Manage	Automation Objects	Public	List	SedSurvey		150 B	6	900 B



SETUP

Custom Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, if a specific user is running the app, a specific profile, or just a general user.

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I

Action	Name ↑
Edit Del	Account
Edit Del	Case
Edit Del	Contact
Edit Del	Lead
Edit Del	Opportunity
Edit Del	Response

7. Permission Sets

Assign the following permission sets:

SedSurvey_Admin -> Full Access to SedSurvey App

SedSurvey_User -> Standard User -> Partial Access to SedSurvey App

Navigate to **Setup** → **Permission Sets** and Click on Manage Assignments and Assign User

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set: sedSurvey Admin

[Clone](#) [Edit Properties](#) [Manage Assignments](#) [View Summary](#)

Permission Set Overview

Description

License

Session Activation Required ☐

Permission Set Groups Added To 0

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

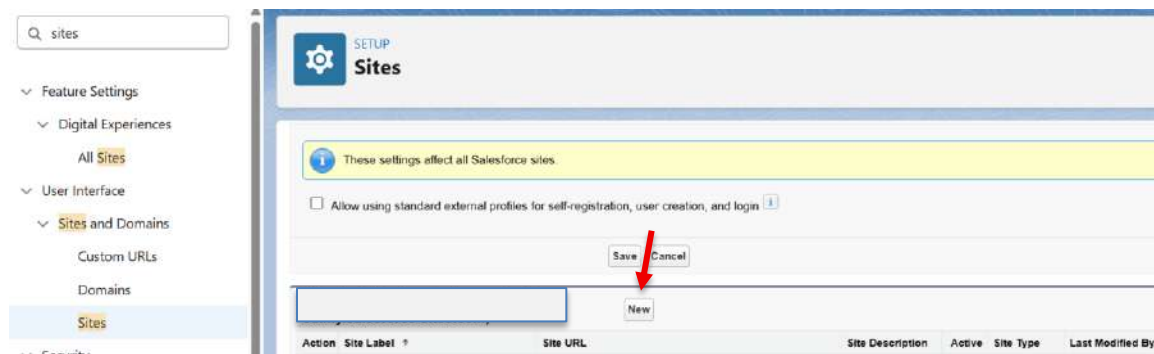
8. Site Configuration

Activate Salesforce Sites and configure the Site Guest User profile with access to required objects, fields, Apex classes, and Visualforce pages.

1. Go to Setup → search Sites → Register My Salesforce Site Domain



2. Click on New



3. Add Site **Label** as **SedSurvey Site** and fill **Default web address (SedSurvey)** and search **SurveyPage** and SiteTemplate as shown in image

SETUP
Sites

Site Label: SedSurvey Site
Site Name: SedSurvey_Site
Site Description:
Site Contact:
Default Record Owner:
Default Web Address: SedSurvey
Active: ☒
Active Site Home Page: [Preview]
Inactive Site Home Page: InMaintenance [Preview]
Site Template: [Search]
Site Robots.txt:
Site Favorite Icon:
Analytics Tracking Code:

4. After clicking on search for SurveyPage you will get below image

Visualforce Page ~ Salesforce - Developer Edition - Google Chrome

Lookup

SurveyPage Go!

You can use "*" as a wildcard next to other characters to improve your search results.

< Clear Search Results

Search Results

Label	Name	Namespace Prefix	Api Version	Description	Created By Alias	Created Date	Last Modified By
SedSurveyPage	SurveyPage	SedSurvey	61.0		jhosp	3/12/2026, 1:24 PM	jhosp

5. site should be active and you should get SedSurveyPage, SiteTemplate and **save** it.

The screenshot shows the 'SETUP Sites' configuration page. The 'Site Label' and 'Site Name' are both 'SedSurvey_Site'. The 'Active' checkbox is checked. The 'Active Site Home Page' is 'SedSurveyPage' and the 'Inactive Site Home Page' is 'InMaintenance'. The 'Site Template' is 'SiteTemplate'. Red arrows point to the 'Active' checkbox, the 'SedSurveyPage' dropdown, and the 'SiteTemplate' dropdown. The 'Default Web Address' is 'SedSurvey'.

6. After Saving You will get to see site details – Domain Name and as shown in image below and Click on Public Access Settings

The screenshot shows the 'Site Details' page for 'SedSurvey Site'. The 'Public Access Settings' tab is selected, indicated by a red arrow. The page displays various settings for the site, including 'Active' status, 'Site Home Page', 'Site Template', and 'Public Access Settings'. The 'Public Access Settings' section shows 'Allow framing by the same origin only (Recommended)' and 'Enable Content Sniffing Protection'. The 'Custom URLs' section at the bottom shows a table with one entry: 'dev-ed.my.salesforce-sites.com'. A red arrow points to the 'Domain Name' column in the 'Custom URLs' table.

Action	Domain Name	Path	Current Domain Configuration Option	Certificates and Keys	Certificat
Edit Del View Preview as Admin	dev-ed.my.salesforce-sites.com	/	Salesforce Sites Domain		

7. give access for objects and apex class
 - a. Enable Apex class as shown below and check Visualforce Page Access

The screenshot shows the 'Profiles' section in the Salesforce Setup menu. The 'SedSurvey Site Profile' is selected. A red arrow points to the 'Edit' link in the 'Record Type Settings' section. Below this, the 'Profile Detail' section shows the profile name, user license, and other settings. The 'Page Layouts' section is also visible.

Profile
SedSurvey Site 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 (12) | 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) | Categories (0)

Profile Detail [Edit](#) [View Users](#)

Name	SedSurvey Site Profile		
User License	Guest User License	Custom Profile	☒
Description			
Created By		Modified By	

Page Layouts

Standard Object Layouts

The screenshot shows the 'Enabled Apex Class Access' and 'Enabled Visualforce Page Access' sections. A red arrow points to the 'Edit' link in the 'Enabled Apex Class Access' section. The 'Enabled Visualforce Page Access' section shows a list of Visualforce pages and their corresponding AppExchange package names. A blue box highlights the 'SedSurvey.SiteTemplate' and 'SedSurvey.SurveyPage' pages, and another blue box highlights the 'SedSurvey' package name.

Enabled Apex Class Access [Edit](#)

No Apex Classes enabled

Enabled Visualforce Page Access [Edit](#)

Visualforce Page Name	AppExchange Package Name
BandwidthExceeded	
Exception	
FileNotFound	
ForgotPassword	
ForgotPasswordConfirm	
InMaintenance	
SedSurvey.SiteTemplate	SedSurvey
SedSurvey.SurveyPage	SedSurvey
SiteLogin	
SiteRegister	
SiteRegisterConfirm	
Unauthorized	

Apex Classes are:

SedSurvey.AIConfigurationController
SedSurvey.AIConfigurationTester
SedSurvey.AnswerChoiceHelper
SedSurvey.AutomationConditionEvaluator
SedSurvey.AutomationDataHelper
SedSurvey.AutomationHandler
SedSurvey.AutomationRuleEvaluator
SedSurvey.AutomationTriggerProcessor
SedSurvey.ChoiceProcessor
SedSurvey.CreateSurveyInputWrapper
SedSurvey.DemoClass
SedSurvey.ResponseHandlerHelper
SedSurvey.SaveSurveyQuestionDetailHelper
SedSurvey.SchedulerManagerController
SedSurvey.SurveyAISummaryHandler
SedSurvey.SurveyAISummaryQueueable
SedSurvey.SurveyAISummaryScheduler
SedSurvey.SurveyBuilderHelper
SedSurvey.SurveyConfigController
SedSurvey.SurveyController
SedSurvey.SurveyControllerHelper
SedSurvey.SurveyEmailBuilderHelper
SedSurvey.SurveyEmailProcessor
SedSurvey.SurveyHelper
SedSurvey.SurveyQuestionAIControllerCallout
SedSurvey.SurveyQuestionDeleter
SedSurvey.SurveyQuestionDTO
SedSurvey.SurveyQuestionHelper
SedSurvey.SurveySummaryAICallout
SedSurvey.SurveySummaryAIController
SedSurvey.SurveyUtilityController

Enable Apex Class Access

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

Save

Cancel

Available Apex Classes

SedSurvey.SurveyAISummaryHandler

SedSurvey.SurveyAISummaryQueueable

SedSurvey.SurveyAISummaryScheduler

SedSurvey.SurveyBuilderHelper

SedSurvey.SurveyConfigController

SedSurvey.SurveyController

SedSurvey.SurveyControllerHelper

SedSurvey.SurveyEmailBuilderHelper

SedSurvey.SurveyEmailProcessor

SedSurvey.SurveyHelper

SedSurvey.SurveyQuestionAIControllerCallout

SedSurvey.SurveyQuestionDTO

SedSurvey.SurveyQuestionDeleter

SedSurvey.SurveyQuestionHelper

Add

Remove

Enabled Apex Classes

SedSurvey.AIConfigurationController

SedSurvey.AIConfigurationTester

SedSurvey.AnswerChoiceHelper

SedSurvey.AutomationConditionEvaluator

SedSurvey.AutomationDataHelper

SedSurvey.AutomationHandler

SedSurvey.AutomationRuleEvaluator

SedSurvey.AutomationTriggerProcessor

SedSurvey.ChoiceProcessor

SedSurvey.CreateSurveyInputWrapper

SedSurvey.DemoClass

SedSurvey.ResponseHandlerHelper

SedSurvey.SaveSurveyQuestionDetailHelper

SedSurvey.SchedulerManagerController

b. Click on edit button and then scroll down to custom object permission and Save.

Objects are :

AI Configurations

Answer Choices

Automations

Dependent Questions

Initiated

Questions

Responses

Summary Scheduler Configurations

Surveys

Survey Questions

Custom Object Permissions									
	Basic Access				Data Administration				
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields		
AI Configurations	☒	☒					☒		
Answer Choices	☒	☒					☒		
Automations	☒	☒					☒		
Dependent Questions	☒	☒					☒		
Initiated	☒	☒					☒		
Questions	☒	☒					☒		
Responses	☒	☒					☒		
Summary Scheduler Configurations	☒	☒					☒		
Surveys	☒	☒					☒		
Survey Questions	☒	☒					☒		

9. Email Template Notes

Salesforce does not allow Email Templates stored in Private or Public folders to be included in managed packages. Therefore, only templates stored in the SedSurvey_Templates folder are included with this package.

You need not create a new template. You can make use of existing template that we provide. Only if you need customization and personalize template go for new template creation

- If you would like to use Lightning Email Templates with images or Files, you will need to create the template manually in your org after installing the package.

Steps to create a Lightning Email Template:

1. Go to Setup → Search Classic Email Templates.
2. Click New Email Template.
3. Follow steps as shown in image
4. Include your **Site URL with the Initiated Id parameter** in the survey link.
5. Update your Survey configuration to use the newly created template.

Example Survey Link:

```
<p>Hello,<br/><br/>
This survey is created against the contact.</p>

<p>Please complete the survey using the following link:
<a href="https://your-site-
url/SedSurvey?id={!SedSurvey__Initiated__c.Id}">
Survey Link
</a></p>

<p>Thank you,<br/>
Survey Team</p>
```

Note: Replace `your-site-url` with the **Site URL configured in your Salesforce org**. refer image below where site configuration is done

Q class

▼ Email

Classic Email Templates

Classic Letterheads

▼ Custom Code

Apex Classes

▼ Data Classification

Data Classification Download

Data Classification Settings

SETUP

Classic Email Templates

Unfiled Public Classic Email Templates

i

Classic Email Template Availability

Folder: Unfiled Public Classic Email Templates ▼ [Create New Folder](#)

New Template

Q class

▼ Email

Classic Email Templates

Classic Letterheads

▼ Custom Code

Apex Classes

▼ Data Classification

Data Classification Download

Data Classification Settings

Data Classification Upload

SETUP

Classic Email Templates

Email Template

New Template

Step 1. Email Template: New Template

Choose the type of email template you would like to create.

☒ Text

☐ HTML (using Classic Letterhead)

☐ Custom (without using Classic Letterhead)

☐ Visualforce



SETUP

Classic Email Templates

NEW TEMPLATE

Select the appropriate folder and enter the name and description for the email template below. Note that the Description field is for internal use only.

Once you have completed the HTML email template check the "Available For Use" box to make this template available to your users.

Step 2. Custom Email Template: New Template

Email Template Information

Folder	Unfiled Public Classic Email Templates ▼
Available For Use	☒
Email Template Name	Survey SendContactSurvey
Template Unique Name	SedSurvey_SendContactSu ⓘ
Encoding	Unicode (UTF-8) ▼
Description	
Subject	

▼ Email

Classic Email Templates

Didn't find what you're looking for? Try using Global Search.



SETUP

Classic Email Templates

Email Template

[Send Test and Verify Merge Fields](#)**Subject** Automation second reminder

Plain Text Preview

<p>Hello,

Please complete the survey using the following link: Access the link here</p>

<p> Thanks </p>

Site Details
SedSurvey Site

< [Back to List Sites](#)

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

Site Label	SedSurvey Site	Site Name	SedSurvey_Site
Site Description		Site Contact	jagadeish.hospet
Active	☒	Login	Not Allowed
Active Site Home Page	SedSurvey_SurveyPage (Preview)	Site Favorite Icon	
Inactive Site Home Page	InMaintenance (Preview)	Site Robots.txt	
Site Template	SedSurvey_SiteTemplate (Preview)	Enable Feeds	☐
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	Lightning Features for Guest Users	☒ i
Enable Content Sniffing Protection	☒ i	Enable Browser Cross Site Scripting Protection	☒ i
Referrer URL Protection	☒ i	Allow only required cookies for this site	☐ More Details
Guest Access to the Payments API	☐ i	Guest Access to the Support API	☐ i
Default Record Owner	jagadeish.hospet i	Redirect to custom domain	☒ i
Cache public Visualforce pages	☒ More Info		
Created by	jagadeish.hospet, 3/12/2026 1:46 PM	Last Modified by	jagadeish.hospet, 3/12/2026

[Edit](#) [Public Access Settings](#) [Login Settings](#) [URL Redirects](#) [Deactivate](#)

Custom URLs

Action	Domain Name	Path	Current Domain Configuration Option	Certificates and Keys	Certificat
Edit Del View Preview as Admin	jagadeish.hospet	/	Salesforce Sites Domain		

Note:

If you are unable to see Nav items (AI Configuration, Summary Scheduler Configuration) please add these to Nav Items as shown in image.
click on Icon as shown in image and add AI Configuration, Summary Scheduler Configuration

SedSurvey [Home](#) [SurveyNow](#) [Automation](#) [AI Configuration](#) [Summary Scheduler Configuration](#)

Search

[AI Configuration](#) [Summary Scheduler Configuration](#)

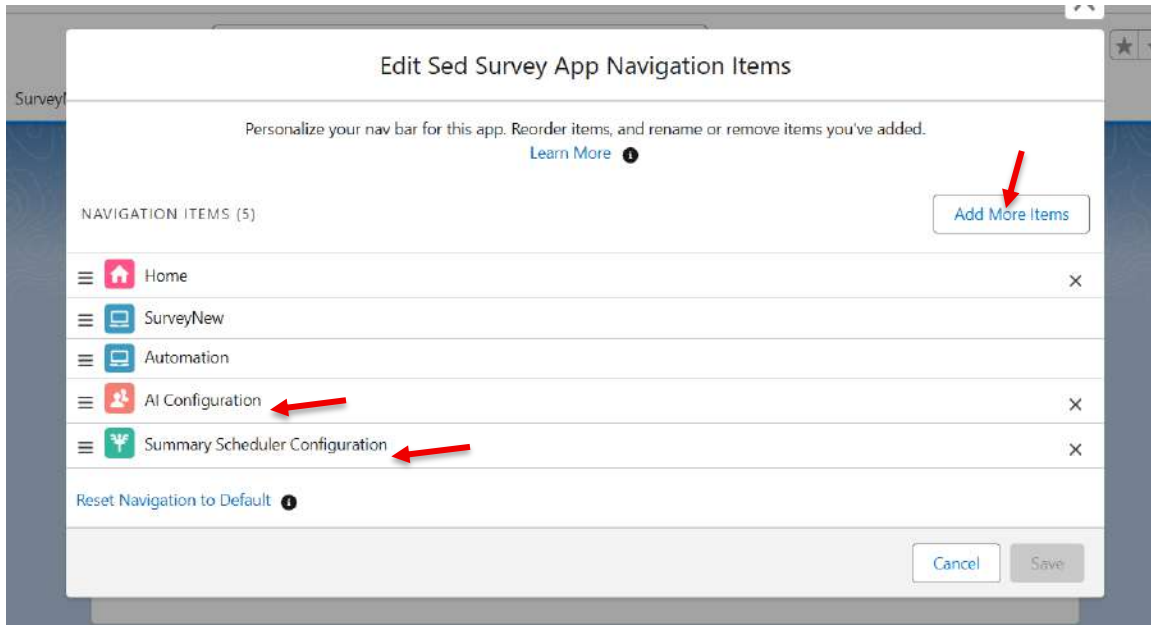
AI Configuration

*AI Provider: Deepseek

*AI Model: deepseek-chat

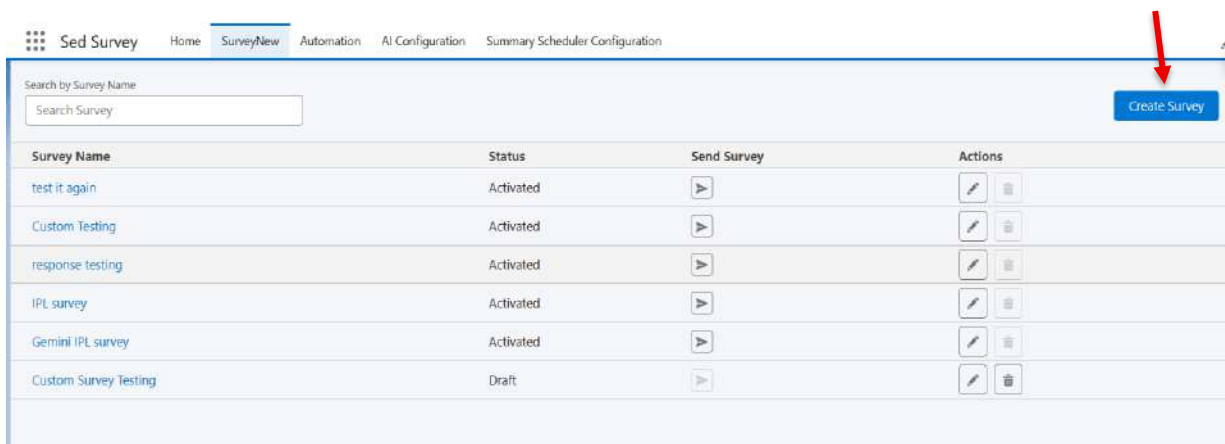
Enable AI: ☒ Active

[Save](#)



10. Creating a Survey

- Open the SedSurvey app. The SurveyNew page is the home page where you can view existing surveys, survey status, the search bar, delete option, and the Create Survey button.
- Click **Create Survey**.
- Enter the Survey Name. Select the required question type and click **Next** to proceed to the **Add Question** page.
- Add the required **questions and choices** for your survey.
- Add **Branding** for your survey.
- Preview the **questions and choices**, then click **Next** to proceed to the **Thank You** page.
- Click **Save** to save the survey.



Create Survey

Survey Name:

Select the Question Types:

Custom Survey

Stellar Feedback based on stars

Simplicity Index

Thumbs up / Down

Perception Matrix

Number 0 to 10

Text Box

[Cancel](#) [Next](#)

Add Questions

✓ Add Questions Preview Page Thank You Page

Question 1

Select the choice of answer:

Radio button

Check box

Star

Thumbs up/Down

Smileys

Number from 0 to 10

Text Box

[Add Question](#)

Add Questions

✓ Add Questions Preview Page Thank You Page

Question 1

Selected the choice of answer: **Radio Button** [Add Choice](#) [Back](#)

[Add Question](#)

Branding Page

✓

✓

Branding

Preview Page

Thank You Page

Customize Branding

Reset

Logo



Remove Logo

Upload Logo

Logo Background Color

■

 #822322

Q1: Which team do you think will win IPL 2026?

☐ Mumbai Indians

☐ Chennai Super Kings

☐ Kolkata Knight Riders

☐ Royal Challengers Bengaluru

Q2: How excited are you about the new player auction for IPL 2026?

☆☆☆☆☆☆☆☆

Back

Next

Background Image



Remove Image

Upload Image

Background Image Blur

0-20

1

Background Image Opacity

0-1

0.8

Background Primary Color

■

 #F8BBD0

Question Text Color

■

 #DA26AE

Q1: Which team do you think will win IPL 2026?

☐ Mumbai Indians

☐ Chennai Super Kings

☐ Kolkata Knight Riders

☐ Royal Challengers Bengaluru

Q2: How excited are you about the new player auction for IPL 2026?

☆☆☆☆☆☆☆☆

Back

Next

Preview Page

×

✓

✓

✓

Preview Page

Thank You Page



Q1: Which team do you think will win IPL 2026?

☐ Mumbai Indians

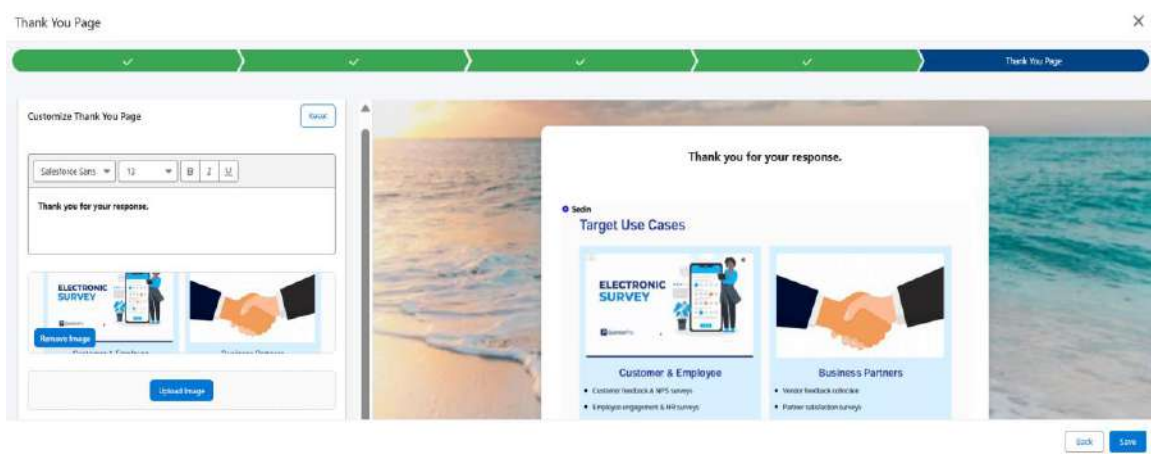
☐ Chennai Super Kings

☐ Kolkata Knight Riders

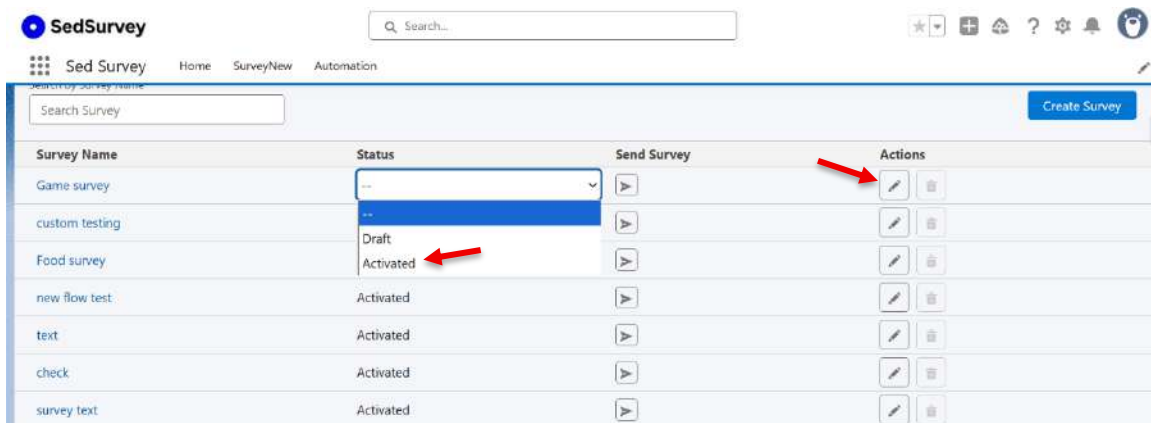
☐ Royal Challengers Bengaluru

Back

Next



Click on Action button you can change status of Survey



11. Managing Survey Questions

You will see Five tabs: Questions, Dependent Questions, Dashboard View, AI Summary and Sent Email Report.

In the Questions tab, you can create or edit survey questions and choices only when the survey is **not active (Draft)**. You can also **reorder the questions using drag-and-drop**

a. Edit Survey Questions (Questions Tab)

Questions | **Dependent Questions** | Dashboard View | All Summary | Sent Email Report

Back

Save Question Re-Order Create Question

Q. No.	Question	Choice Type	Choice 1	Choice 2	Actions
1	custom radio	Radio	radio 1	radio 2	 
2	custom check box	Checkbox	checked	not checked	 
3	text feedback	Text			 

b. Create or Edit Dependent Questions

Questions | **Dependent Questions** | Dashboard View | All Summary | Sent Email Report

Back

Create Dependent Question

Dependent Question	Survey Name	Actions
custom check box	test it again	 

Create Dependent Question

Condition Requirements to Execute Outcome

Any Conditions are met (OR)

1	*Survey Question custom check box	*Operator Equals	*Answer Choice checked	
---	--------------------------------------	---------------------	---------------------------	---

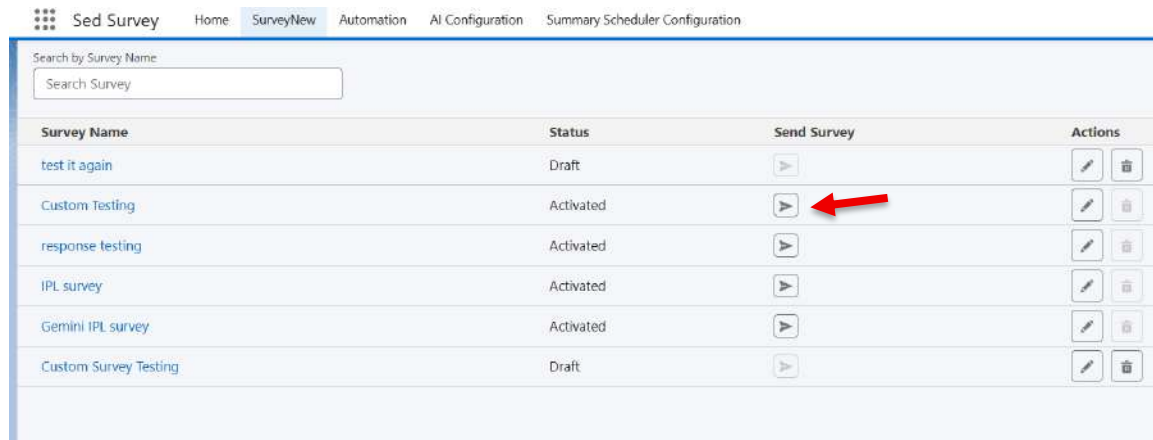
+ Add Condition

*Dependent Question
text feedback

Cancel Save

12. Sending Surveys (Manual)

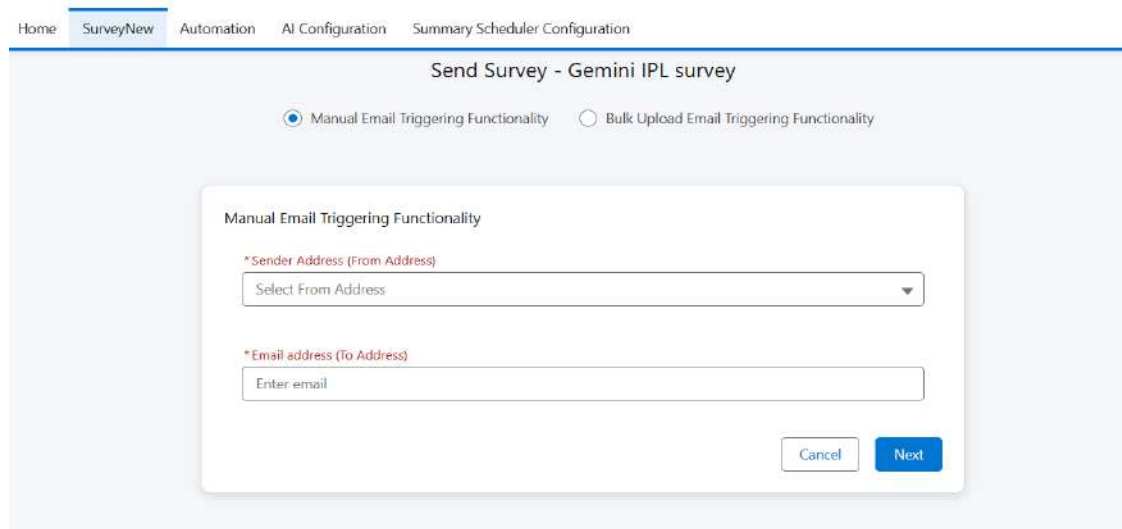
- Click the Send icon on the Home Page.



The screenshot shows the 'Sed Survey' application interface. At the top, there is a navigation bar with tabs: 'Sed Survey', 'Home', 'SurveyNew', 'Automation', 'AI Configuration', and 'Summary Scheduler Configuration'. Below the navigation bar is a search bar labeled 'Search by Survey Name' with a placeholder 'Search Survey'. The main content area displays a table of surveys.

Survey Name	Status	Send Survey	Actions
test it again	Draft		
Custom Testing	Activated		
response testing	Activated		
IPL survey	Activated		
Gemini IPL survey	Activated		
Custom Survey Testing	Draft		

- Select the **Sender Address (Org-Wide Email Address)**.
- Enter the recipient's email address.



The screenshot shows the 'Send Survey - Gemini IPL survey' form. At the top, there is a navigation bar with tabs: 'Home', 'SurveyNew', 'Automation', 'AI Configuration', and 'Summary Scheduler Configuration'. Below the navigation bar is a title 'Send Survey - Gemini IPL survey'. There are two radio buttons: 'Manual Email Triggering Functionality' (selected) and 'Bulk Upload Email Triggering Functionality'. Below the radio buttons is a form titled 'Manual Email Triggering Functionality'. The form has two input fields: '*Sender Address (From Address)' with a dropdown menu showing 'Select From Address', and '*Email address (To Address)' with a text input field showing 'Enter email'. At the bottom right of the form are two buttons: 'Cancel' and 'Next'.

- Click **Next** to proceed to the **Survey Email Template** page, where you can either create your own template using the **sample templates** or select a **custom email template**.

a. Using Sample Templates

The screenshot shows the 'Survey Email Templates' page. At the top, there are two radio buttons: 'Create your own email template' (selected) and 'Select email template'. A red arrow points to the 'Create your own email template' option. Below this is the 'Email Template Creation' form. It has two main sections: 'Subject' with a text input field labeled 'Enter email subject', and 'Html Body' with a text area labeled 'Enter email body'. A red arrow points to a 'Sample Templates' button in the top right corner of the form. Below this button, a dropdown menu is open, showing 'Sample Template 1' and 'Sample Template 2'. At the bottom right of the form, there are three buttons: 'Preview', 'Back', and 'Next'.

The screenshot shows a preview window titled 'Sample Template 1 (Using surveyUrl and Rich text)'. The window is divided into two main sections. The left section displays a preview of the email content, which includes a greeting 'Hello,', a paragraph about a survey, a bolded line 'The survey will remain open now through April 11.', an orange 'Start Survey Now' button, another paragraph, and the text 'Salesforce Customer Insights'. The right section displays the raw HTML code for the email template. A red arrow points to a 'Copy HTML' button at the bottom right of the window, next to a 'Close' button.

- Click **Next** to move to the **Email Reminder** page. If you want to enable reminders, select **Yes**; otherwise, select **No** and proceed to send the survey.

Email Reminders

Number of days before Survey expires in: Days.

Do you want email reminders?

☒ Yes ☐ No

[Back](#) [Next](#)

- If you select **Yes**, enter the **Survey Expiry Days**. You will then see the **First Reminder** and **Second Reminder** pages. Here, you can either create your own template by entering the **subject and body** (you may use the sample template HTML for the body as you did in Survey Email Templates earlier) or select an existing **custom email template**.

1st Email Reminder Template

1st Email Reminder After: Days.

☒ Create your own email reminder template ☐ Select email reminder template

First Email Reminder Reminder Templates ▼

* Subject

Enter First Reminder subject

* Html Body(Use the keyword '\$SurveyLink' in the body to indicate where the survey link should appear.) ⓘ

Enter First Reminder Body

[Preview](#) [Back](#) [Next](#)

2nd Email Reminder Template

2nd Email Reminder After: Days.

☐ Create your own email reminder template
 ☒ Select email reminder template

Search Email Reminder Templates

Select	Template Name
☐	Second Email Reminder Template
☐	First Email Reminder Template
☐	SedSurvey SendContactSurvey
☐	Automation Test First
☐	Automation Test Second

- Once all the required details are completed, click **Send** to send the survey.

13. Sending Surveys (Bulk Upload)

- Prepare a CSV file containing the recipient email addresses.
- Select the Survey and Org-Wide Email Address.
- Upload the CSV file.
- Preview the list of recipients.
- Send the surveys in **bulk** (the remaining steps are the same as those described in the **Manual Send process**).

Send Survey - Gemini IPL survey

☐ Manual Email Triggering Functionality
 ☒ Bulk Upload Email Triggering Functionality

Bulk Upload Email Triggering Functionality

* Sender Address (From Address)

Choose a CSV file: Choose File No file chosen

Sample Data
Cancel
Next

Survey Data Preview

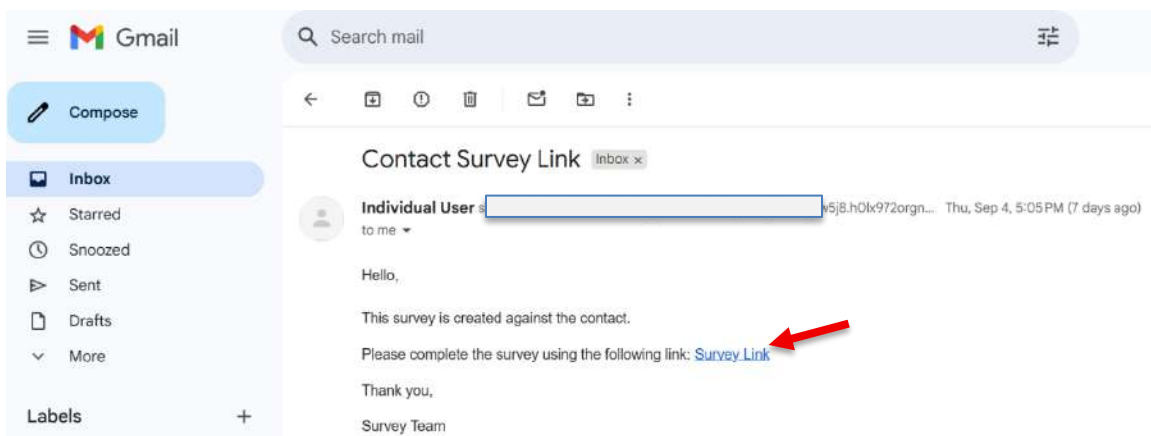
Search Data

☒ Select All	ID	ISSELECTED	NAME	EMAIL
☒	1	true	Jagedish H	
☒	2	true	Shubhendra	

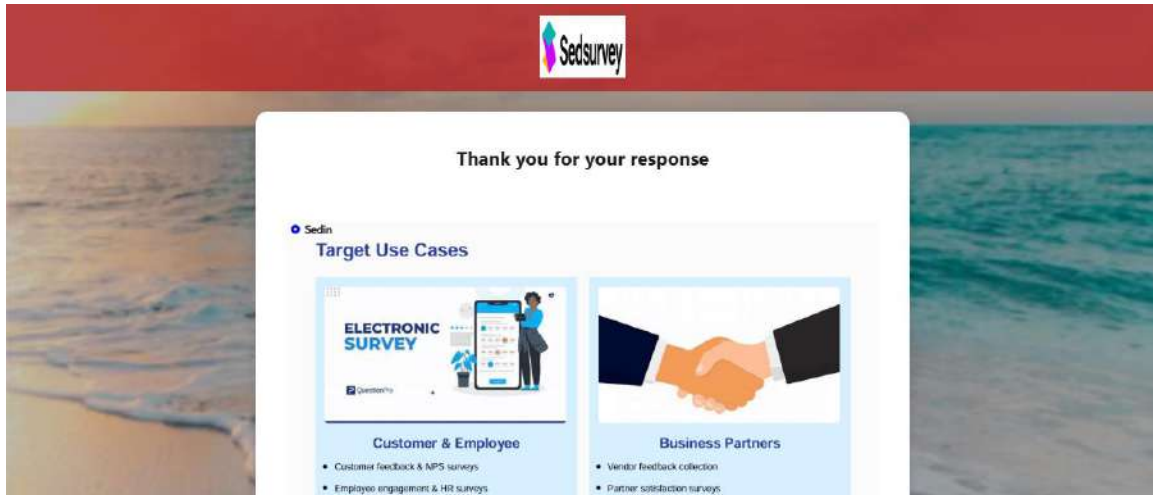
Page 1 of 1

14. Submitting Surveys

Recipients receive an email containing a survey link. When clicked, the survey opens on the Salesforce Site page where users can answer questions and submit responses.



The screenshot shows a survey page with a red header and a background image of a beach. The 'Satsurvey' logo is in the top center. The first question, 'Q1: Which team do you think will win IPL 2026?', has four radio button options: 'Mumbai Indians', 'Chennai Super Kings', 'Kolkata Knight Riders', and 'Royal Challengers Bengaluru'. The second question, 'Q2: How excited are you about the new player auction for IPL 2026?', is followed by a row of ten blue stars for rating.

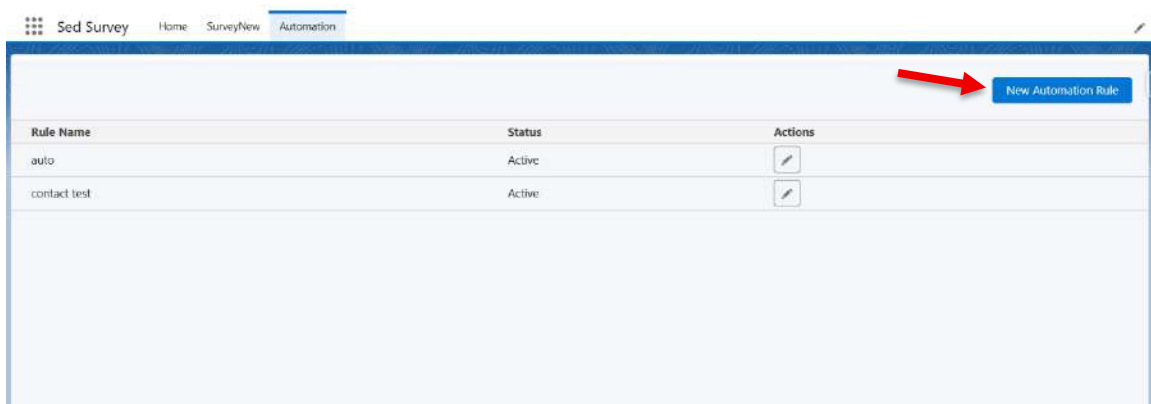


15. Automation Setup

Automation allows surveys to be sent automatically when records are created or updated in Salesforce objects such as Contact, Lead, Case, Opportunity, or Account.

a. Creating an Automation Rule:

- Click the **Automation** tab.
- You will see a list of existing automation rules along with their **Status** and **Edit** options.
- Click **New Automation Rule** to create a new automation.



Automation Rule Configuration

When you click New Automation Rule, a modal pop-up window appears. All required fields must be completed before saving.

Fields to configure:

- Automation Name – Enter a unique name for the automation rule.
- Criteria Triggering Action – Defines when the survey should be triggered (for example, when a record is created or updated).
- Salesforce Object – Select the object on which the automation will run (for example, Contact or Lead).
- Condition Logic – Specify how multiple conditions should be evaluated
 - AND – All conditions must be met.
 - OR – Any one condition must be met.
 - Custom Logic – Define custom logic using condition numbers.
- Conditions – Add one or more conditions by specifying:
 - Field (e.g., Lead Source)
 - Operator (e.g., Equals, Contains)
 - Value (e.g., Phone)
- Select Survey (Mandatory) – Choose a survey from the list.
 - Only Active Surveys will appear in this dropdown.
- Select Template – Choose an email template that will be used to send the survey.
- Active – Select this checkbox to activate the automation rule.
- From Address (Mandatory) – Select a verified Org-Wide Email Address that will be used to send the email.
- First Reminder Days (Optional) – Enter the number of days after which the first reminder email should be sent.
- Second Reminder Days (Optional) – Enter the number of days after which the second reminder email should be sent.

Finally, click Save to create the automation rule.

Sed Survey Home SurveyView Automation

Survey Automation Rule

*Name *API Name

Description

Triggering Conditions

*Action

☐ Create record

☐ Update record

☐ Create or update record

*Object

Select an Object

Cancel Save

Edit Automation Rule

Edit Survey Automation Rule

Triggering Conditions

*Action

☐ Create record

☐ Update record

☒ Create or update record

*Object

Lead

Condition Requirements to Execute Outcome

All Conditions are met (AND)

1 *Field Industry *Operator Equals *Value Apparel

+ Add Condition

Cancel Update

16. Automation Example Scenario

Example Setup for **Contact** Object

- Object: Contact
- Condition Logic: AND
- Condition: Field = Lead Source, Operator = Equals, Value = Phone

When a **Contact** record is created or updated with **Lead Source = Phone**, and a valid **Email** address is available on the record:

- The configured **survey email** will be automatically sent to the contact's email address.
- If First Reminder and Second Reminder settings are configured, reminder emails will be sent based on the specified number of days.

17. AI Features Overview

SedSurvey includes AI capabilities for generating survey questions and summarizing survey responses using external AI providers.

Note:

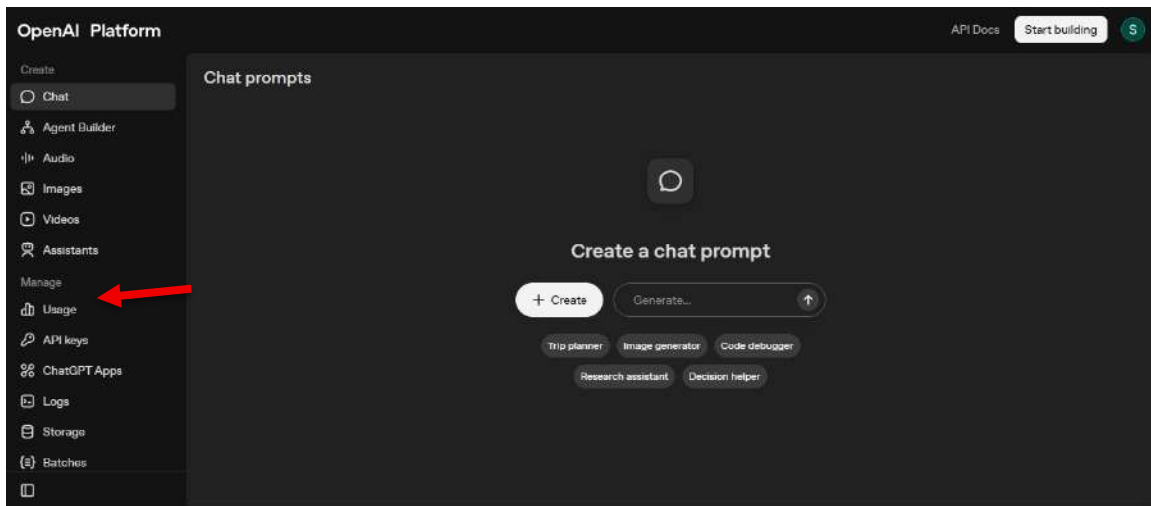
How to Create Your API Key

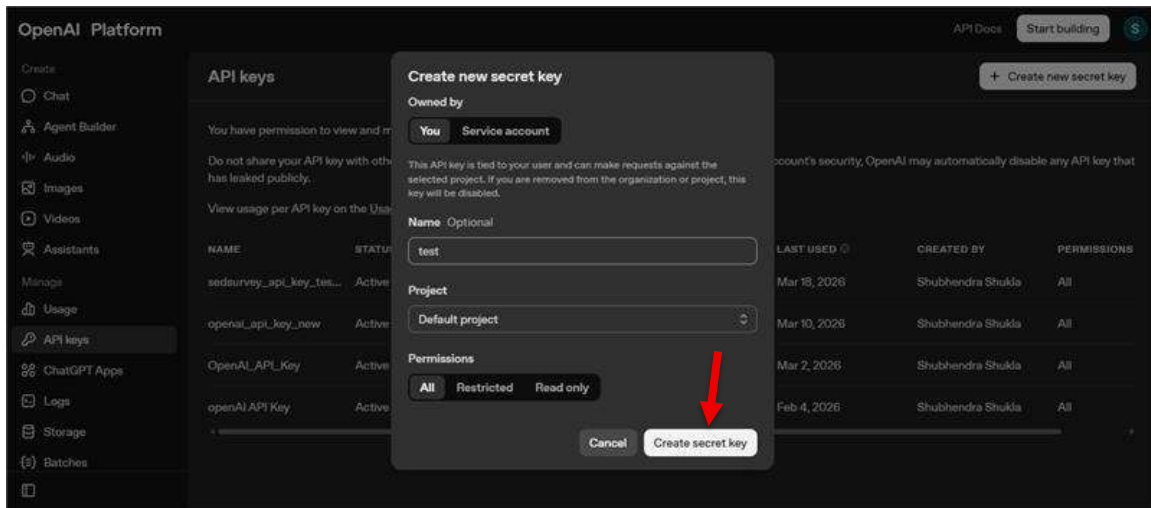
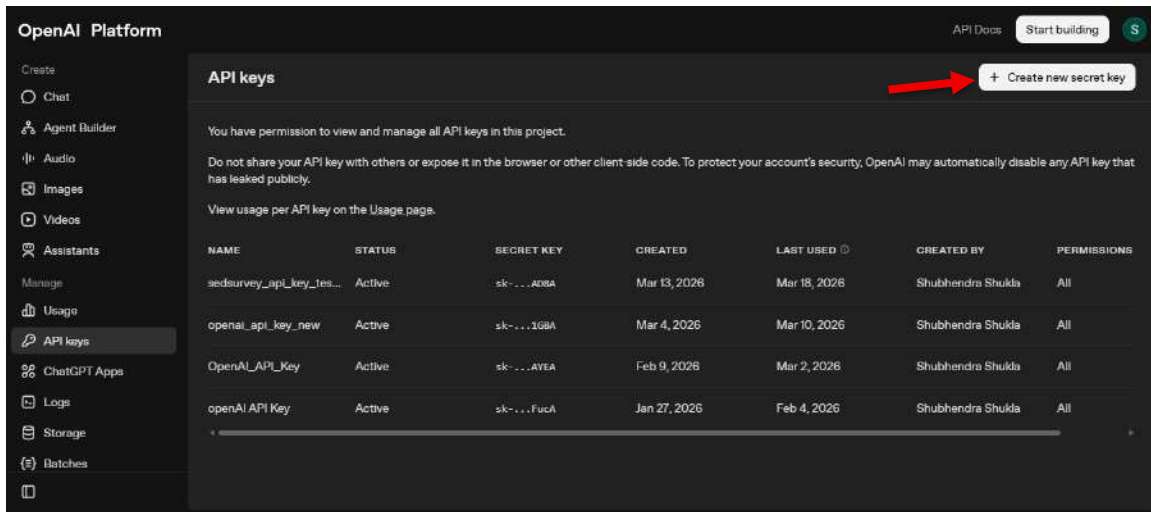
To use AI features, you must configure your own API key from your preferred provider.

Option 1: OpenAI (Detailed Steps)

1. Visit the OpenAI platform: <https://platform.openai.com/api-keys>
2. Log in or create an account
3. Navigate to **API Keys** section
4. Click **Create new secret key**
5. Copy and securely store your API key
6. Add the API key in SedSurvey AI configuration settings

(Refer to the screenshots below for step-by-step guidance)





Option 2: Other AI Providers

For other supported providers, please follow their official documentation:

- **Claude (Anthropic):** <https://platform.claude.com/settings/keys>
- **DeepSeek:** https://platform.deepseek.com/api_keys
- **Gemini (Google AI):** <https://aistudio.google.com/app/api-keys>

👉 The setup steps are similar:

- Create an account

- Generate an API key
- Configure the key in SedSurvey

◆ Important Notes

- Ensure your API key is kept **secure and confidential**
- SedSurvey does **not store or expose your API keys externally**
- Usage and billing are managed directly by the respective AI provider

◆ Custom AI Integration

If you would like to integrate **any other AI provider** apart from the supported ones, please feel free to contact us.

✉ **Email:** Dhinakar@sedintechologies.com

Our team will review your request and assist you with the integration.

18. AI Provider Setup

SedSurvey supports multiple AI providers. Each provider requires API key configuration through Named Credentials and External Credentials in Salesforce.

18.1 Claude Setup

- Open Salesforce Setup.
- Search for Named Credentials.
- Verify whether Claude API Service has been created.

The screenshot shows the Salesforce Setup interface. On the left, a search bar contains 'named credentials' and a sidebar lists 'Security' and 'Named Credentials'. The main content area is titled 'Named Credentials' and shows a table with 4 items. A red arrow points to the 'Claude API Service' entry in the table.

Label	Type	URL	External Credential
Claude API Service	Secured Endpoint	https://api.anthropic.com/v1/messages	Claude External Credential
Deepseek API Service	Secured Endpoint	https://api.deepseek.com	Deepseek External Credential
Gemini API Service	Secured Endpoint	https://generativelanguage.googleapis.c...	Gemini External Credential
OpenAI API Service	Secured Endpoint	https://api.openai.com	OpenAI External Credential

Navigate to External Credentials and open the corresponding credential.

Q named credentials

Security

Named Credentials

Didn't find what you're looking for? Try using Global Search.

SETUP

Named Credentials

Named Credentials External Credentials External Auth Identity Providers

4 Items · Sorted by Label

Label	Authentication Protocol
Claude External Credential	Custom
Deepseek External Credential	Custom
Gemini External Credential	Custom
OpenAI External Credential	Custom

- Click Edit Principals and add the **Authentication Parameter Name : APIKey (Required)** and Value as shown below.
- The **Value** should be your **own API Key** (which you created earlier)
- Click **Save**.

Related Named Credentials

Label	Name	URL
Claude API Service	SedSurvey__Claude_API_Service	https://api.anthropic.com/v1/messages

Principals

New

Sequence N...	Parameter Name	Authenticati...	Authentication Status	Actions
1	Claude API Key	0	Unknown	

Custom Headers

New

Seq...	Name	Value	Actions
1	x-api-key	{\${Credential.Claude_External_Credential.APIKey}}	
2	anthropic-version	2023-06-01	
3	Content-Type	application/json	

Search Setup

Edit Principal

*Parameter Name: Claude API Key *Sequence Number: 1

*Identity Type: Named Principal

Authentication Parameters [Add](#)

Principal Access

Name	Entity Type	ID
Claude_API_Access	PermissionSet	0PSJ3000000UGeTOAW

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

- Go to **Permission Sets** as shown below.

Edit Principal

Authentication Parameters [Add](#)

Parameter 1 [Delete](#)

*Name: APIKey

*Value:

Principal Access

Name	Entity Type	ID
Claude_API_Access	PermissionSet	0PSJ3000000UGeTOAW

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

- Open **Claude_API_Access**.
- Assign this permission set to **Admin** or the required users.

SETUP
Permission Sets

Permission Set
Claude API Access

Find Settings  [Clone](#) [Manage Assignments](#) [View Summary](#)

[Permission Set Overview](#) > **External Credential Principal Access**

Items per page: 50 Items 
View: All 

External Credential Principal Access

External Credential Principal Name	Installed Package
Claude_External_Credential - Claude API Key	

18.2 DeepSeek Setup

- Open Salesforce Setup.
- Search for Named Credentials.
- Verify whether Deepseek API Service has been created.

SETUP
Named Credentials

Named Credentials External Credentials External Auth Identity Providers

4 Items - Sorted by Label

Label	Type	URL	External Credential
Claude API Service	Secured Endpoint	https://api.anthropic.com/v1/messages	Claude External Credential
Deepseek API Service	Secured Endpoint	https://api.deepseek.com	Deepseek External Credential
Gemini API Service	Secured Endpoint	https://generativelanguage.googleapis.com/v1b...	Gemini External Credential
OpenAI API Service	Secured Endpoint	https://api.openai.com	OpenAI External Credential

Navigate to External Credentials and open the corresponding credential.

Q named credentials

Security

Named Credentials

Didn't find what you're looking for? Try using Global Search.

SETUP

Named Credentials

Named Credentials External Credentials External Auth Identity Providers

4 Items - Sorted by Label

Label	Authentication Protocol
Claude External Credential	Custom
Deepseek External Credential	Custom
Gemini External Credential	Custom
OpenAI External Credential	Custom

- Click Edit Principals and add the **Authentication Parameter Name : APIKey (Required)** and Value as shown below.
- The **Value** should be your **own API Key**.
- Click **Save**.

Related Named Credentials

Label	Name	URL
Deepseek API Service	SedSurvey_Deepseek_API_Service	https://api.deepseek.com

Principals

New

Sequence ...	Parameter Name	Authentic...	Authentication Status	Actions
1	DeepSeek API Key	0	Unknown	

Custom Headers

New

Se...	Name	Value	Actions
1	Authorization	Bearer ({Credential.Deepseek_External_Credential.APIKey})	

Search Setup

Edit Principal

*Parameter Name: DeepSeek API Key

*Sequence Number: 1

*Identity Type: Named Principal

Authentication Parameters Add

Principal Access

Name	Entity Type	ID
Deepseek_API_Access	PermissionSet	0PSJ3000000UGeUOAW

Cancel Save

- Go to **Permission Sets** as shown below.

Edit Principal

Authentication Parameters Add

Parameter 1 Delete

*Name: APIKey

*Value:

Principal Access

Name	Entity Type	ID
Deepseek_API_Access	PermissionSet	0PSJ3000000UGeUOAW

Cancel Save

- Open **Deepseek_API_Access**.
- Assign this permission set to **Admin** or the required users.

SETUP
Permission Sets

Permission Set
Deepseek API Access

Q Find Settings... Clone Manage Assignments View Summary

Permission Set Overview > External Credential Principal Access

Items per page: 50 Items
View: All

External Credential Principal Access

External Credential Principal Name	Installed Package
Deepseek_External_Credential - DeepSeek API Key	

18.3 Gemini Setup

- Open Salesforce Setup.
- Search for Named Credentials.
- Verify whether Gemini API Service has been created.

Q named Credentials

Security

Named Credentials

Didn't find what you're looking for? Try using Global Search.

SETUP
Named Credentials

Named Credentials External Credentials External Auth Identity Providers

4 Items - Sorted by Label

Label	Type	URL	External Credential
Claude API Service	Secured Endpoint	https://api.anthropic.com/v1/messages	Claude External Credential
Deepseek API Service	Secured Endpoint	https://api.deepseek.com	Deepseek External Credential
Gemini API Service	Secured Endpoint	https://generativelanguage.googleapis.com/v1b...	Gemini External Credential
OpenAI API Service	Secured Endpoint	https://api.openai.com	OpenAI External Credential

Navigate to External Credentials and open the corresponding credential.

SETUP
Named Credentials

Named Credentials **External Credentials** External Auth Identity Providers

4 Items - Sorted by Label

Label	Authentication Protocol
Claude External Credential	Custom
Deepseek External Credential	Custom
Gemini External Credential	Custom
OpenAI External Credential	Custom

Edit Principal

Authentication Parameters [Add](#)

Parameter 1 [Delete](#)

* Name
APIKey

* Value
.....

Principal Access

Name	Entity Type	ID
Gemini_API_Access	PermissionSet	0PSJ3000000UGeVOAW

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

SETUP
Permission Sets

Permission Set
Gemini API Access

[Find Settings...](#) [Clone](#) [Manage Assignments](#) [View Summary](#)

[Permission Set Overview](#) > **External Credential Principal Access**

Items per page: 50 Items
View: All

External Credential Principal Access

External Credential Principal Name	Installed Package
Gemini_External_Credential - Gemini API Key	

18.4 OpenAI Setup

- Open Salesforce Setup.
- Search for Named Credentials.
- Verify whether OpenAI API Service has been created.

Security

Named Credentials

Didn't find what you're looking for? Try using Global Search.

SETUP
Named Credentials

Named Credentials
External Credentials
External Auth Identity Providers

4 Items - Sorted by Label

Label	Type	URL	External Credential
Claude API Service	Secured Endpoint	https://api.anthropic.com/v1/messages	Claude External Credential
Deepseek API Service	Secured Endpoint	https://api.deepseek.com	Deepseek External Credential
Gemini API Service	Secured Endpoint	https://generativelanguage.googleapis.c...	Gemini External Credential
OpenAI API Service	Secured Endpoint	https://api.openai.com	OpenAI External Credential

Navigate to External Credentials and open the corresponding credential.

Security

Named Credentials

Didn't find what you're looking for? Try using Global Search.

SETUP
Named Credentials

Named Credentials
External Credentials
External Auth Identity Providers

4 Items - Sorted by Label

Label	Authentication Protocol
Claude External Credential	Custom
Deepseek External Credential	Custom
Gemini External Credential	Custom
OpenAI External Credential	Custom

- Click Edit Principals and add the **Authentication Parameter Name : APIKey (Required)** and Value as shown below.
- The **Value** should be your **own API Key**.
- Click **Save**.

Related Named Credentials

Label	Name	URL
OpenAI API Service	SedSurvey_OpenAI_API_Service	https://api.openai.com

Principals

New

Sequence N...	Parameter Name	Authenticat...	Authentication Status	Actions
1	OpenAI API Key	0	Unknown	

Custom Headers

New

Se...	Name	Value	Actions
1	Authorization	Bearer (\${Credential.OpenAI_External_Credential.APIKey})	

Edit Principal

* Parameter Name: OpenAI API Key

* Sequence Number: 1

* Identity Type: Named Principal

Authentication Parameters Add

Principal Access

Name	Entity Type	ID
OpenAI_API_Access	PermissionSet	0PSJ3000000UGeWOAW

Cancel Save

- Open **OpenAI_API_Access**.
- Assign this permission set to **Admin** or the required users.

Edit Principal

Authentication Parameters Add

Parameter 1 Delete

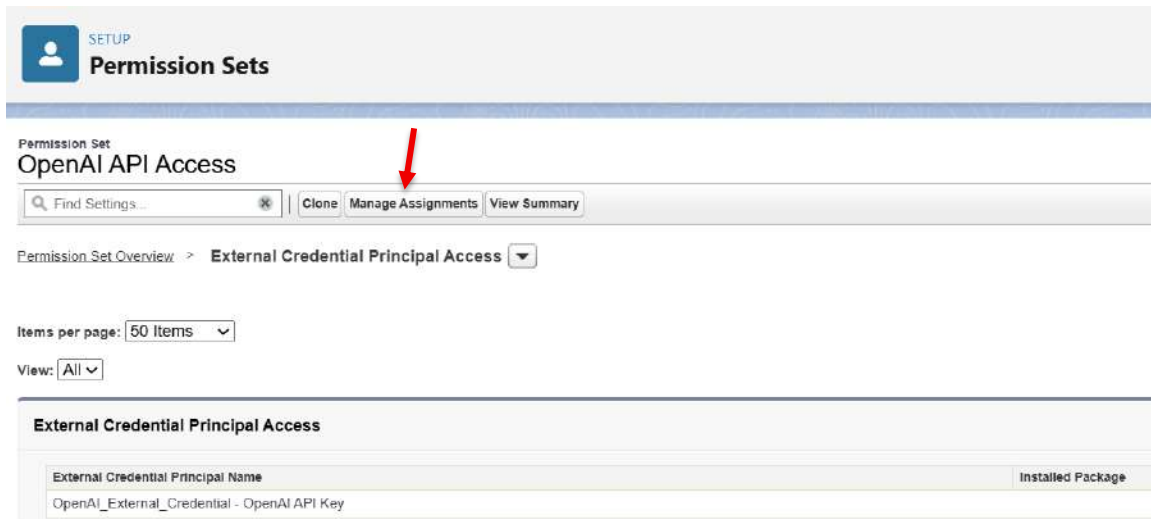
* Name: APIKey

* Value:

Principal Access

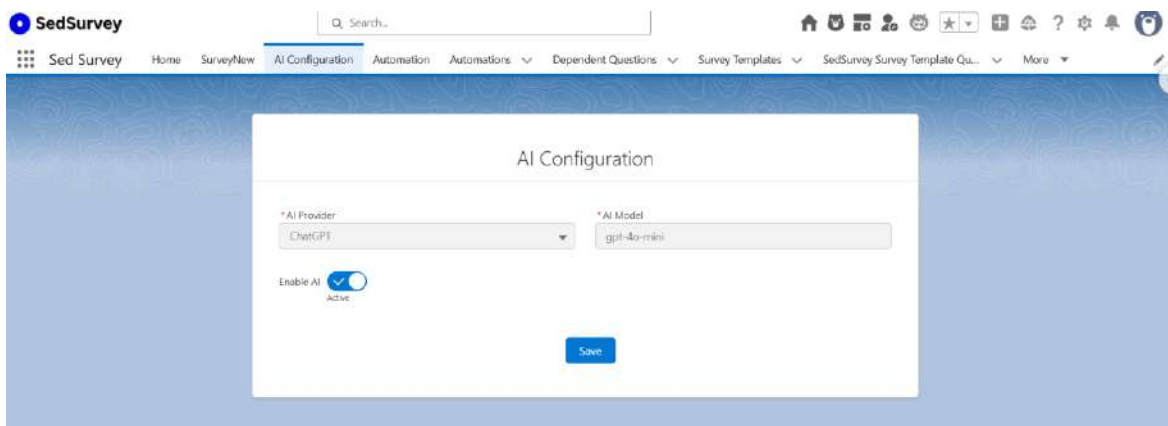
Name	Entity Type	ID
OpenAI_API_Access	PermissionSet	0PSJ3000000UGeWOAW

Cancel Save



19. AI Configuration

- Click the AI Configuration tab.
 - Select the AI Type (e.g., ChatGPT or Gemini).
 - Enter the AI Model (for example, *gpt-4o-mini* or *gemini-2.5-flash*).
 - Enable the Enable AI toggle.
 - Click **Save**.
- If you need to edit the configuration later, first disable the AI (set it to inactive), then make the required changes and save the configuration again.



20. AI Summary Scheduler

Configure the scheduler from the Summary Scheduler tab. This allows AI summaries to run automatically based on a configured schedule.

Navigate to the **Summary Scheduler** tab from the navigation menu.

- Select the desired **Schedule Type** and configure the corresponding time or interval.
- Click **Apply** to save the scheduler configuration.
- Once configured, the AI Summary will run automatically based on the selected schedule (e.g., every 5 minutes). If new responses are received during a run, the AI Summary will be updated accordingly.
- Click on edit if you want to edit schedule configuration.

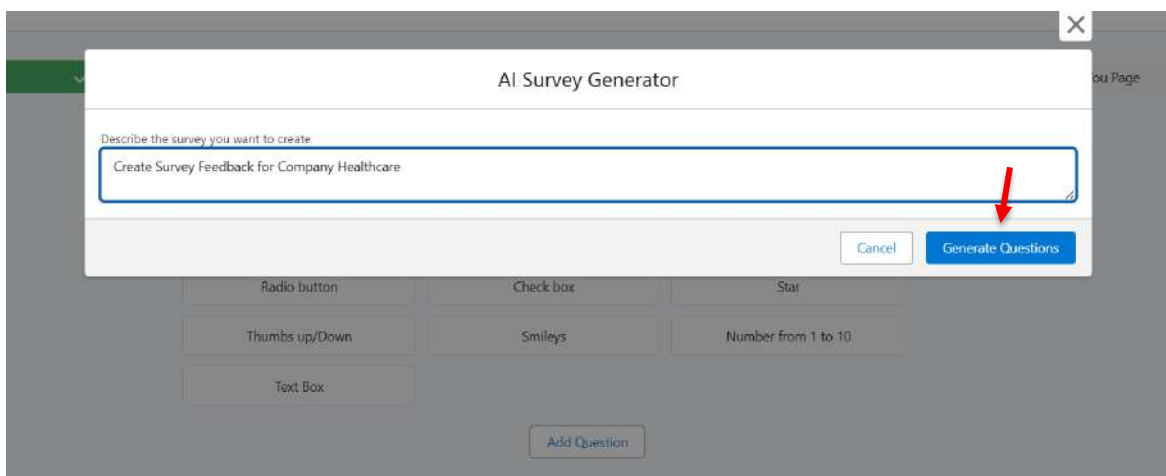
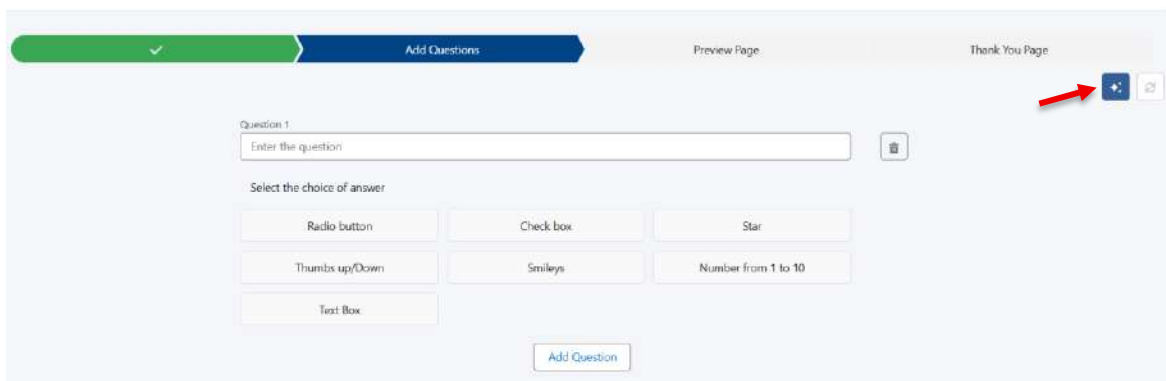
The screenshot shows the 'Summary Scheduler Configuration' interface. At the top, there is a navigation bar with links: Home, SurveyNew, Automation, AI Configuration, and Summary Scheduler Configuration. The main title is 'Summary Scheduler Configuration'. Below the title, there is a 'Schedule Type' dropdown menu with a list of options: 'Every X Minutes' (selected), 'Every X Hours', 'Daily at Fixed Time', and 'Weekly at Fixed Time'. To the right of the dropdown, there is an 'Every' dropdown menu with '5 mins' selected. Below the dropdowns, there is a blue 'Apply' button.

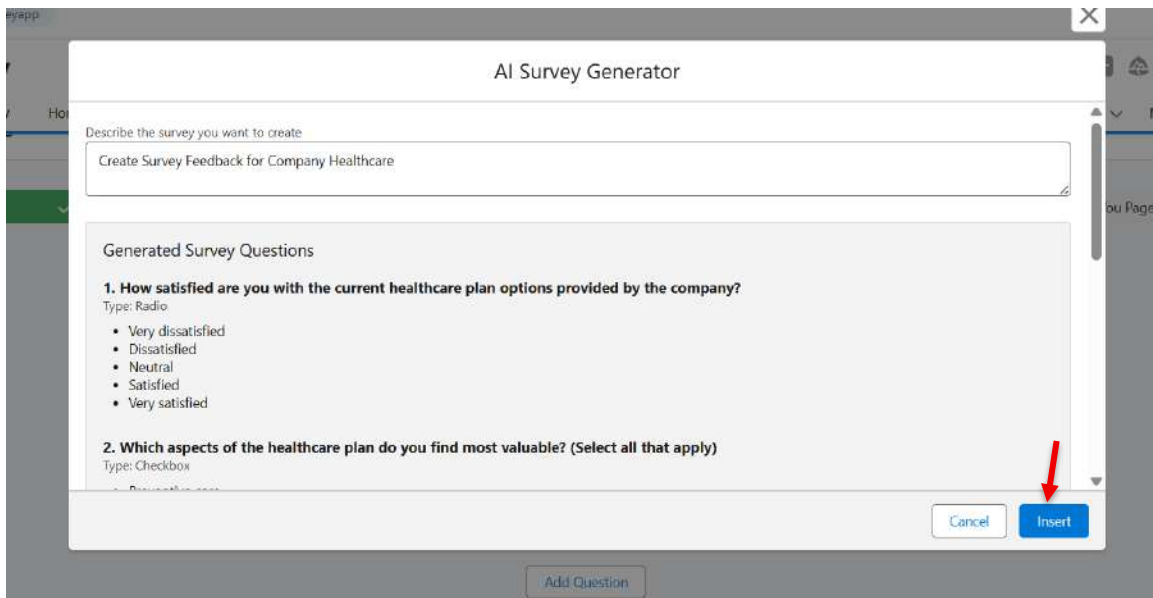
The screenshot shows the 'Summary Scheduler Configuration' interface. At the top, there is a navigation bar with links: Home, SurveyNew, Automation, AI Configuration, and Summary Scheduler Configuration. The main title is 'Summary Scheduler Configuration'. Below the title, there is a 'Schedule Type' dropdown menu with 'Weekly at Fixed Time' selected. To the right of the dropdown, there is a 'Select Time' dropdown menu with '4:15 AM' selected. Below the dropdowns, there is a 'Day of Week' dropdown menu with 'Tuesday' selected. At the bottom, there are two buttons: 'Edit' and 'Apply'.

21. Generating Survey Questions using AI

- Click Create Survey.
- Enter the Survey Name and select the Question Type, then click Next.
- On the Add Question page, you will see the **AI icon** in the right corner. Click the AI icon.
- Enter a description of the question you want to generate.
- Insert the generated question into your survey.
- A **Reset icon** is also available next to the AI icon, which allows you to clear and regenerate the question if needed.
- Continue with the usual survey creation process to complete and save the survey.

Note: AI must be configured before using this feature.

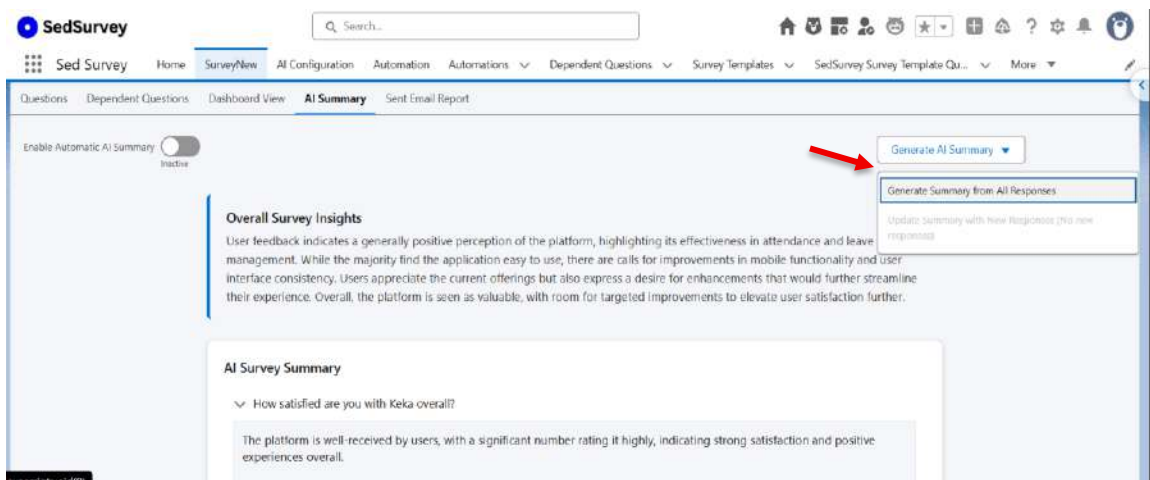




22. Generating AI Summaries

AI summaries can be generated manually or automatically. Users can generate summaries from all responses or merge summaries with new responses.

- Open any Survey and Go to AI Summary Tab.
- Either Manually or Automatically you can generate summaries.
- **For Manually**
 1. Click on Generate AI Summary Picklist button. Select any Picklist values
 - a. Generate Summary from All Responses: Creates a fresh summary using all collected responses.
 - b. Merge Summary with New Responses: Incrementally updates the existing summary using only new responses for better performance.



- **For Automatically**

First Check whether you completed AI Summary Scheduler Configuration, once it's done then follow below steps.

1. Enable AI Summary

Activate AI summary generation for the survey.

2. Run Summary After X Responses

Configure the minimum number of responses required before the summary is generated, ensuring meaningful insights.

3. Choose Summary Mode

- Generate Summary from All Responses: Creates a fresh summary using all collected responses.
- Merge Summary with New Responses: Incrementally updates the existing summary using only new responses for better performance.

