

NPS Survey

This document summarizes the setup of sending Surveys to customers through Email. The customers will receive an email once in 90 days. The user could give a rating of 1-10 and also could give a comment and these details will be stored on NPS Record. If the user edits the response through the same link, the corresponding record will be updated with new changes.

We've used a Map/Reduce script, Suitelet script, and an Email template for the process. The script will consider 7 customers per execution (For the client's requirement. Initially it was 200). There are 2 custom fields available on the Customer record; **Last survey Send date** and **Exclude From NPS Survey**. The last survey send date filed will hold the date where the customer got the last NPS Survey, whereas if the Exclude from NPS Survey Checkbox is checked, that particular customer won't get any NPS Survey.

Email Phone Address		
EMAIL admin@citybuildingsupplies.com.au ACCOUNTS E-MAIL	FAX (08) 9021 2851 WEB ADDRESS	ADDRESS CITY BUILDING SUPPLIES - KALGOORLIE Lot 300, Forrest Street KALGOORLIE 6430 Australia Map
PHONE (08) 9091 4515 ALT. PHONE	DEPARTMENT Sales	
Classification		
PRIMARY SUBSIDIARY OX Tools AU	VISIT FREQUENCY As requested/Internal	AU PRIMARY GROUP HBT
CUSTOMER GRADE E Grade		
DEFAULT ALLOCATION STRATEGY	DEPOSIT DUE	BTN CLICK COUNT
SPECIAL INSTRUCTIONS	MARKETING SUPPORT	LAST SURVEY SEND DATE 18/10/2022
EDI REFERENCE NUMBER	<input type="checkbox"/> MARKETING SUPPORT PROVIDED <input type="checkbox"/> TRAINING CONDUCTED	BTN PRINT COUNT
SHORT NAME CITY BUILDING SUPPLIES <input type="checkbox"/> MONTHLY EMAILS	TYPE OF TRAINING PROVIDED	LAST SALES ACTIVITY 04/11/2021 Phone Call
Sales Relationships Communication Address Marketing Support Financial Preferences System Information Custom Access SuiteCommerce Extensions		
LANGUAGE	SHIPPING CARRIER FedEx/More	<input type="checkbox"/> EMAIL CREDIT NOTES
NUMBER FORMAT	SHIPPING METHOD FIS 300	<input checked="" type="checkbox"/> EMAIL INVOICES
NEGATIVE NUMBER FORMAT	ALCOHOL RECIPIENT TYPE Consumer	<input type="checkbox"/> EMAIL STATEMENTS
EMAIL PREFERENCE	<input type="checkbox"/> EMAIL ITEM FULFILMENT'S	DUNNING LANGUAGE
		<input type="checkbox"/> EXCLUDE FROM NPS SURVEY

If a set of customers got the mail after 90 days, they have the chance to get the next survey. But if still there are customers who have gotten any survey emails, then such customers will be considered first. For e.g.: if there are a total of 1000 customers, the first 7 will get the mail on the first day. From the 91st day, these customers are eligible for getting Survey mail. But there are 5 more customers are there who never get any survey emails, then the script will consider these 5

customers first, and 2 from the first set of customers who got a survey on the first day will be added. The remaining 5(7-2) customers will get the mail on the next execution.

NPS Survey Response Record

When the Map/Reduce script is executed, an email will send to customers (7 customers per execution) who satisfies following conditions;

- Is not inactive
- Should have Email address on Primary Contact
- The **Exclude from NPS Survey** checkbox should be unchecked
- The subsidiary should be **OX Tools AU**
- Last survey send date should be either Empty or Should be before 90 days

The mail will be as follows;

✕ [SANDBOX] Hi, just a question about OX Tools (originally To: bart.snyder@gmail.com)

Angel (angel+1117@jobinandjismi.com) <system@sent-via.netsuite.com>
To: Anand TP

Fri 21/10/2022 11:23

OX
UNLEASH THE POWER

How likely are you to recommend OX Tools to a friend or colleague?

1 2 3 4 5 6 7 8 9 10

1-Not Likely 10-Very Likely

The customer could give a rating from 1-10. After giving the rating, another page will open, where they could add any additional comments



Thank you for your Feedback.

Are there any comments you would like to share relating to your feedback?

Submit your review

On the button click a Thanks message will pop up on the next page. If any other error occurs an error message will be showed on the page



Thank you for your valuable time

All of these details will be stored on a custom record [NPS Survey Response](#) . The record is locked by a workflow [JJ NPS Response Record Locking](#). The custom record has 3 status; **Not Initiated**,

Mailed and **Responded**. Not initiated is the primary state and when the mail is send to the customer, it will become Mailed and when the customer give response/rating, it will become Responded.

Related Scripts

[JJ MR Email Survey OTGA-1515](#)

This Map/reduce script is used for listing the customers for sending survey. This script also creates the custom record NPS Survey Response that stores the responses from Customers and sends NPS Survey through Email to each customers . This script is scheduled on daily basis. Ie; it will execute every day and sends survey to maximum of 7customers each day. customers will receive an email once in 90 days

[NPS Survey](#)

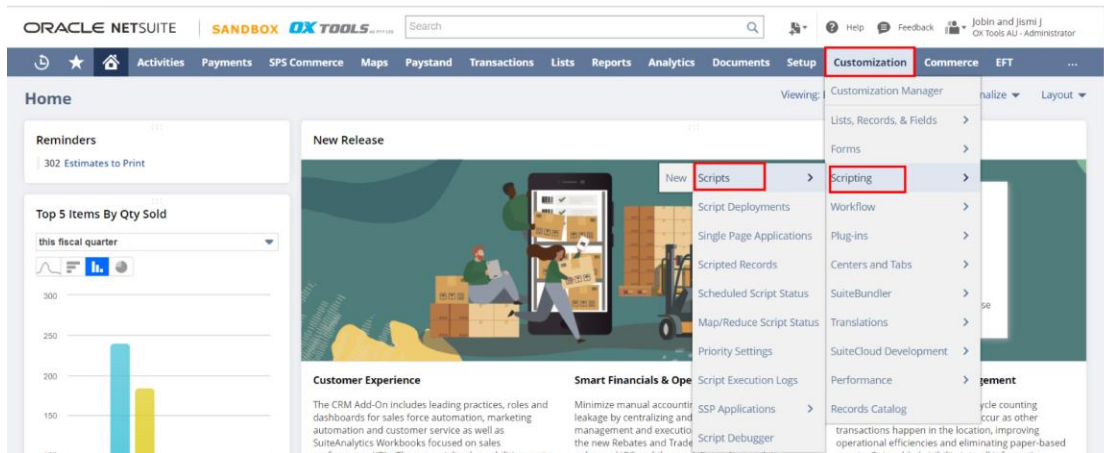
This is the Email Template used for the NPS Survey that send to customers through Email . This includes a rating of 1-10 where each has the link to the suitelet that has next page.

[JJ SL NPS Survey OTGA-1515](#)

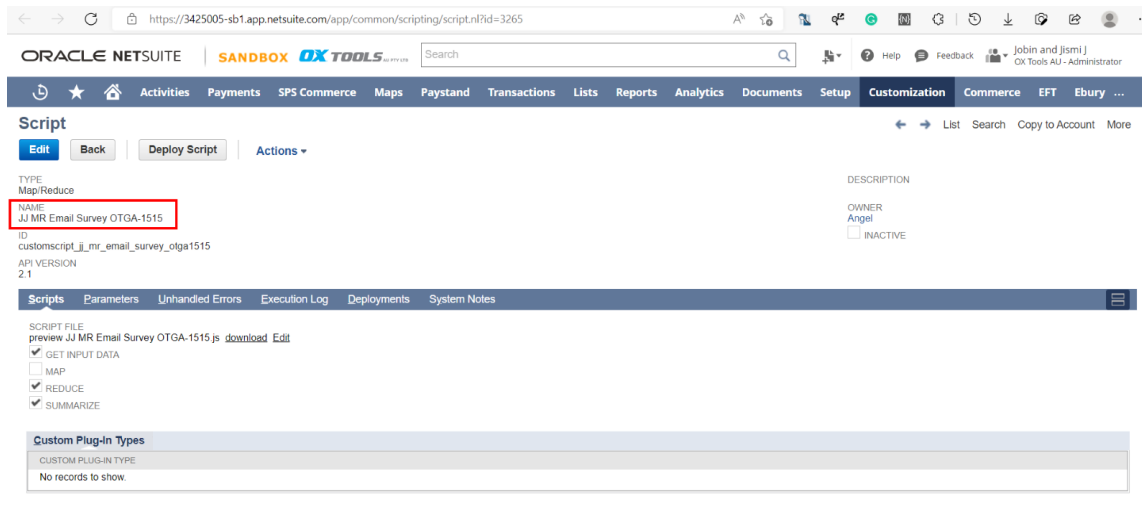
This suitelet contains the Additional Comment section that the customers could add after giving the rating. It loads another [HTML file](#) to view the section. The user could either give/ skip this section. When the user submits this page, it will lead to another page that contains a confirmation/ Thanks message that the customer gave through the NPS survey. It is also using another [HTML file](#) to show the Thanks/Confirmation message. It is also using another [HTML file](#) to show the Error message if there is any error occurred

Working Steps

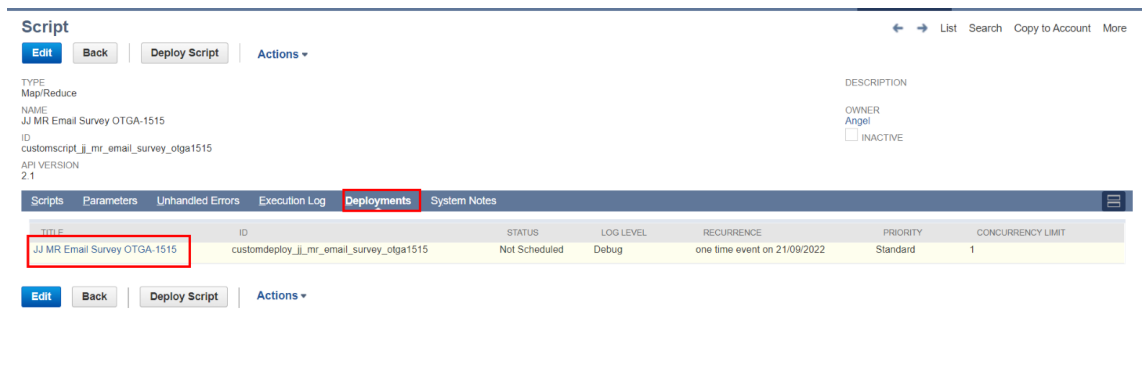
- Customizations > Scripting > Scripts



- On the list select [JJ MR Email Survey OTGA-1515](#)



- On the **Deployments** tab select the Deployment record of the script



Oracle Netsuite Sandbox DX Tools

Script Deployment

Script: JJ MR Email Survey OTGA-1515
 Title: JJ MR Email Survey OTGA-1515
 ID: customdeploy_jj_mr_email_survey_otga1515
 DEPLOYED

STATUS: Not Scheduled
 SEE INSTANCES: Status Page
 LOG LEVEL: Debug
 EXECUTE AS ROLE: Administrator
 PRIORITY: Standard
 CONCURRENCY LIMIT: 1
☒ SUBMIT ALL STAGES AT ONCE
 YIELD AFTER MINUTES: 60
 BUFFER SIZE: 1

Schedule • Execution Log System Notes

X
 SINGLE EVENT
 DAILY EVENT
 WEEKLY EVENT

- Edit the record and click **Save & Execute**

Script Deployment

Save • Cancel • Change ID • Actions •

Save & New
 Save & Copy
 Save and Execute

Script: JJ MR Email Survey OTGA-1515
 Title: JJ MR Email Survey OTGA-1515
 ID: customdeploy_jj_mr_email_survey_otga1515
 DEPLOYED

STATUS: Not Scheduled
 SEE INSTANCES: Status Page
 LOG LEVEL: Debug
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 PRIORITY: Standard
 CONCURRENCY LIMIT: 1
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Schedule • Execution Log System Notes

☒ SINGLE EVENT
☐ DAILY EVENT
☐ WEEKLY EVENT

- On the next page, click Refresh button, until the status becomes **Completed**

Map/Reduce Script Status

Refresh

FILTERS

DATE: today FROM: 28/09/2022 TO: 28/09/2022
 SCRIPT: JJ MR Email Survey OTGA-1515
 DEPLOYMENT ID: CUSTOMDEPLOY_JJ_-_SURVEY_OTGA1515
 STATUS: - All -

☐ SHOW INACTIVES


SCRIPT	DEPLOYMENT ID	DATE CREATED	START DATE	END DATE	STATUS	STAGE	PRIORITY	CONCURRENCY	DETAILS	CANCEL
JJ MR Email Survey OTGA-1515	customdeploy_jj_mr_email_survey_otga1515	28/09/2022 12:42:42 am	28/09/2022 12:42:45 am		Processing	Shuffle	Standard	1	Details	

TOTAL: 1

- Emails will be sending on the Background. Open the Email send to the Customer

Angel (angel+1117@jobinandjismi.com) <system@sent-via.netsuite.com>
To: Anand TP

Fri 21/10/2022 11:23




How likely are you to recommend OX Tools to a friend or colleague?

1 2 3 4 5 6 7 8 9 10

1-Not Likely
10-Very Likely


- Click on the Rating which you want to give. It will lead to the Comment page and give comment if you want or you could leave the section and click on the **Comment** button



Thank you for your Feedback.

Are there any comments you would like to share relating to your feedback?

Great



[Submit your review](#)

- By clicking the **Submit Your Review** button, the window will lead to the last page that contains Thanks message. The user could close the tab after this.



Thank you for your valuable time

- Open the custom record [NPS Survey Response](#) list and open the record which the response from the Customer has updated

NPS Survey Response ^u

← → List Search

📄 ⚙️ Actions ▾

ID: 8701

SURVEY DATE: 05/10/2022

CUSTOMER: S H C Hire - HQ : S H C Hire Centres - BD23 2DE

NPS STATUS: Responded

RESPONSE: 6

FEEDBACK: Great

LAST RESPONSE DATE: 06/10/2022

Notes Files Workflow

User Notes System Notes •

VIEW: Default ▾

New Note Customise View

EDIT	DATE	AUTHOR	TITLE	MEMO	DIRECTION	TYPE	REMOVE
No records to show.							

📄 ⚙️ Actions ▾

- Response and all the details will be stored on the record. It also has the Date when the survey is send to customer and the Date when the customer made last edit etc.
- Initially the status of the record will be **Not initiated**. After sending the mail to the customer it will be changed to **Mailed** and after the customer gives the rating/ feedback, the status will be **Responded**

NPS Survey Response ^h ← → List Search

Actions ▾

ID 20508
 SURVEY DATE 06/11/2022
 CUSTOMER Collins Tools & Welding Supplies (QLD 3275)
 NPS STATUS **Mailed**

RESPONSE
 FEEDBACK
 LAST RESPONSE DATE

Notes **Files** **Workflow** ≡

User Notes **System Notes** •

VIEW
 Default ▾

New Note **Customise View**

EDIT	DATE	AUTHOR	TITLE	MEMO	DIRECTION	TYPE	REMOVE
No records to show.							

NPS Survey Response ^h ← → List Search

Actions ▾

ID 20509
 SURVEY DATE 06/11/2022
 CUSTOMER Complete Flooring Solutions
 NPS STATUS **Responded**

RESPONSE 2
 FEEDBACK
 LAST RESPONSE DATE 07/11/2022

Notes **Files** **Workflow** ≡

User Notes **System Notes** •

VIEW
 Default ▾

New Note **Customise View**

EDIT	DATE	AUTHOR	TITLE	MEMO	DIRECTION	TYPE	REMOVE
No records to show.							

Actions ▾

- Go to the customer record and check the **Last survey Send date** value on the record. This will be the Date which the customer got the last survey email

NPS Survey Response ^h ← → List Search

Actions ▾

ID 20509
 SURVEY DATE 06/11/2022
 CUSTOMER Complete Flooring Solutions
 NPS STATUS Responded

RESPONSE 2
 FEEDBACK
 LAST RESPONSE DATE 07/11/2022

Notes **Files** **Workflow** ≡

User Notes **System Notes** •

VIEW
 Default ▾

New Note **Customise View**

EDIT	DATE	AUTHOR	TITLE	MEMO	DIRECTION	TYPE	REMOVE
No records to show.							

Actions ▾

Customer

Complete Flooring Solutions

Edit

Back

Accept Payment

Reorder

Backing Cards

BDM Sheet

Backorder Report

OX360 Dashboard

Actions

Primary Information

CUSTOMER ID Complete Flooring Solutions	STATUS CUSTOMER-Closed Won	CATEGORY Uncategorized
TYPE Company	SALES REP Tony Samuel	COMMENTS Hey Myra, can you please lock Complete flo
COMPANY NAME Complete Flooring Solutions	INSIDE SALES REP N/A	

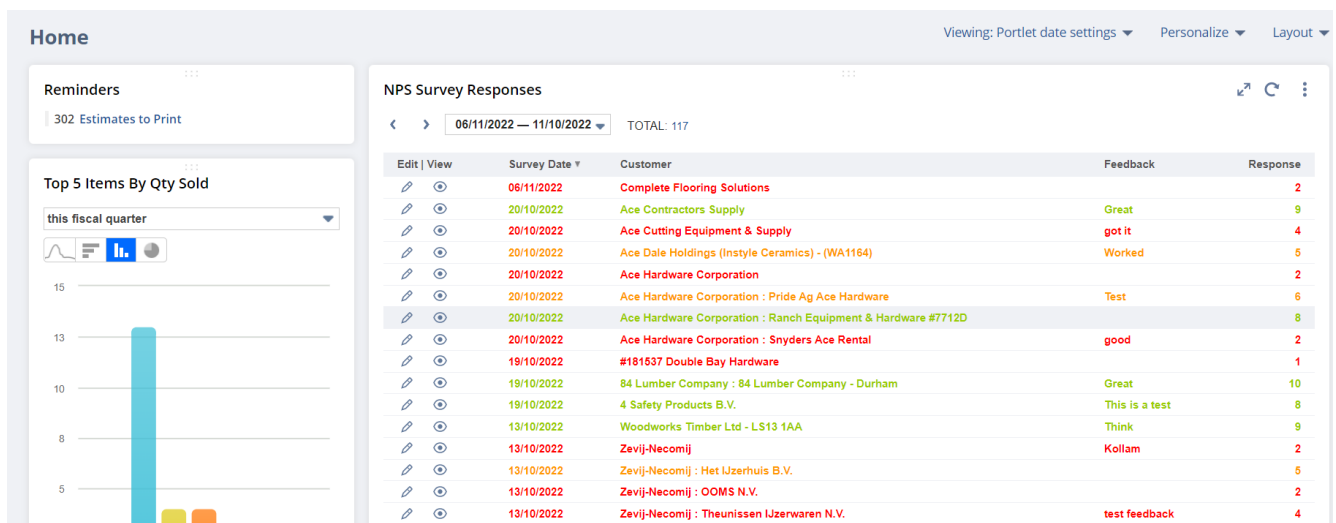
Email | Phone | Address

EMAIL grant@completeflooring.com.au	FAX 03 5245 7203	ADDRESS Grant Complete Flooring Solutions 1/8 Essington st Grovedale VIC 3216 Australia Map
ACCOUNTS E-MAIL grant@completeflooring.com.au	WEB ADDRESS	
PHONE 03 52411145	DEPARTMENT Sales	
ALT. PHONE		

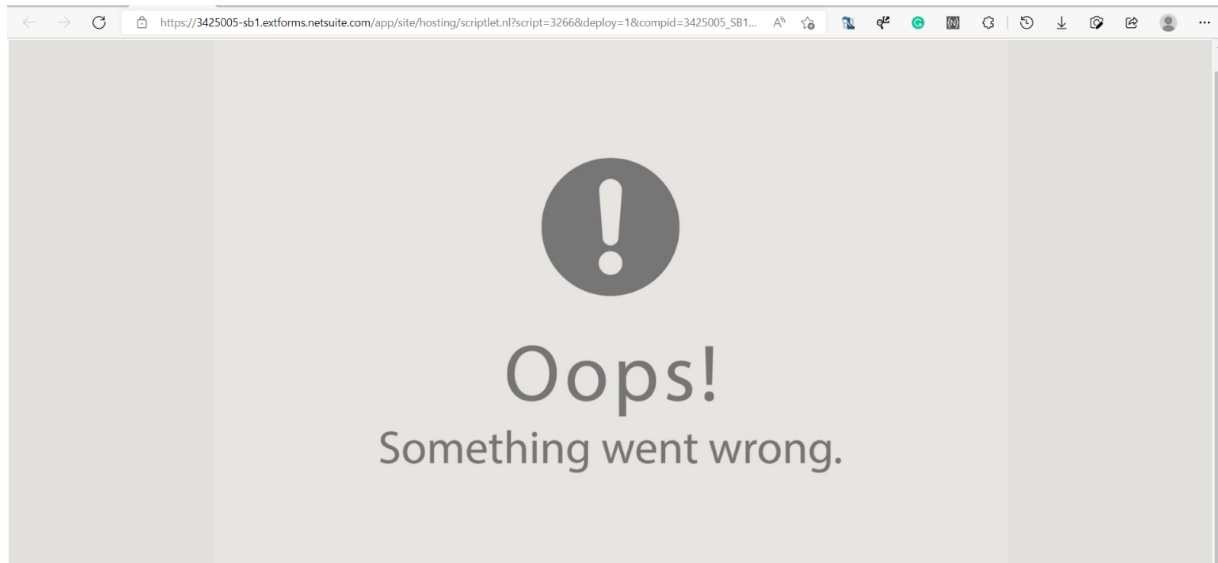
Classification

PRIMARY SUBSIDIARY OX Tools AU	VISIT FREQUENCY As requested/Internal	AU PRIMARY GROUP Independent
CUSTOMER GRADE C Grade		
DEFAULT ALLOCATION STRATEGY	DEPOSIT DUE	BTN CLICK COUNT
SPECIAL INSTRUCTIONS	MARKETING SUPPORT	LAST SURVEY SEND DATE 07/11/2022
EDI REFERENCE NUMBER	<input type="checkbox"/> MARKETING SUPPORT PROVIDED <input type="checkbox"/> TRAINING CONDUCTED	BTN PRINT COUNT
SHORT NAME Complete Flooring Solutions	TYPE OF TRAINING PROVIDED	LAST SALES ACTIVITY 03/03/2022 Event
<input type="checkbox"/> MONTHLY EMAILS		

- To view all the customers responses on the dashboard, got to Home page there you can see the portlet

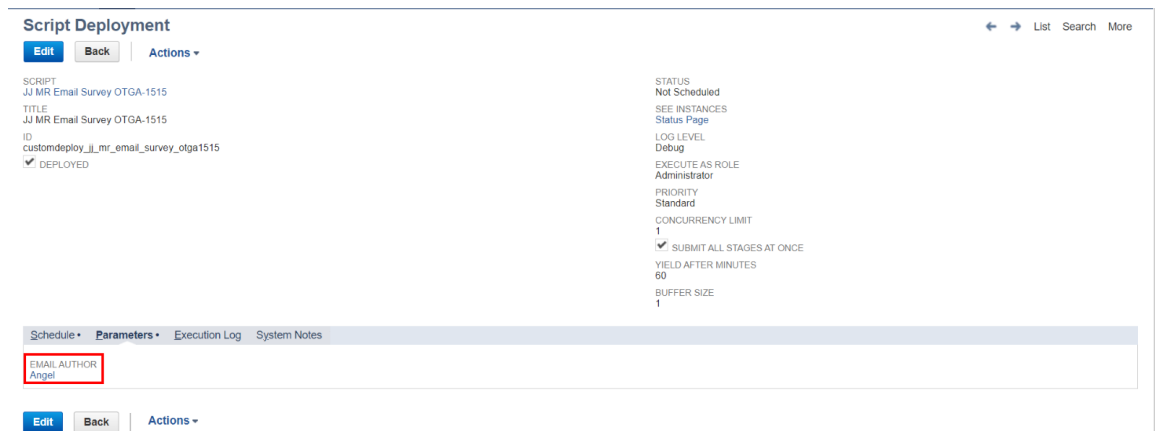


- If some error Occurs



Notes:

- Currently, the MR script has a scrip parameter to select the author of the mail. If the user need to change the author of the mail, they could change it from the script [deployment](#) record of the script



User can only select the employee who has email address.

- Previously if the user deletes the custom record before responding, a blank page will occur when the user tries to respond to the deleted record. To overcome this scenario, I've added a new [workflow](#) that locks the custom record. So, nobody can't edit/ delete the custom record through the UI. So, it won't affect the working of the survey.