CONCEP SEND

Guide to Surveys

V2.0

CONTENTS

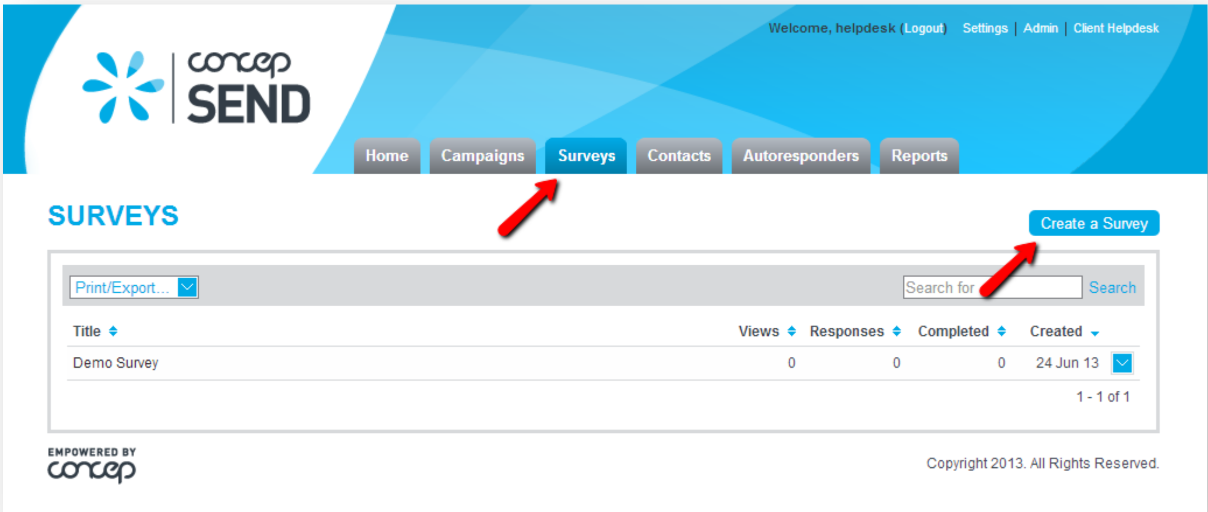
Surveys are a powerful tool that allows you to collect information from your contacts or others who access the URL link for the survey.

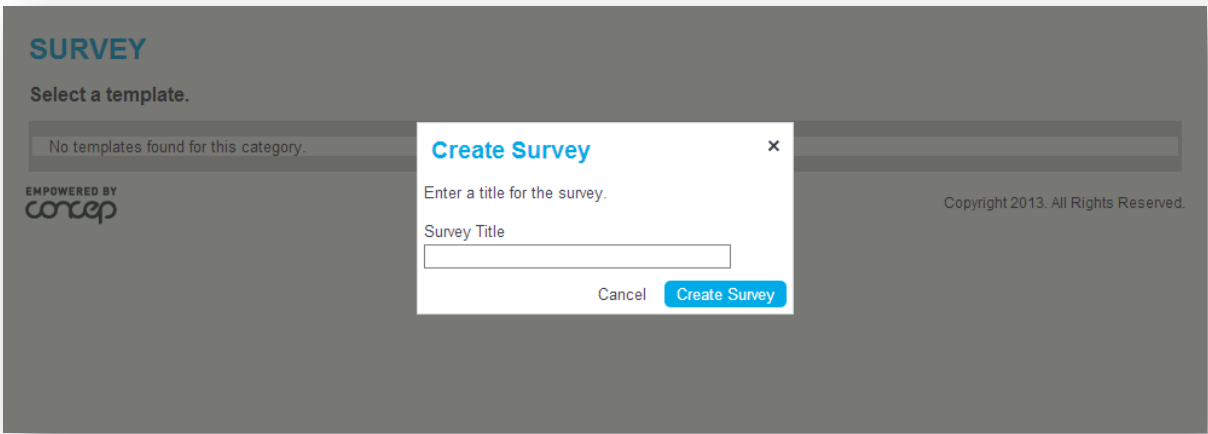
You can use surveys to setup all types of questionnaires, from simple RSVPs to complex client satisfaction surveys.

To create or edit surveys, click Surveys in the main navigation menu. Responses to surveys are stored in the Reports tab of your account.

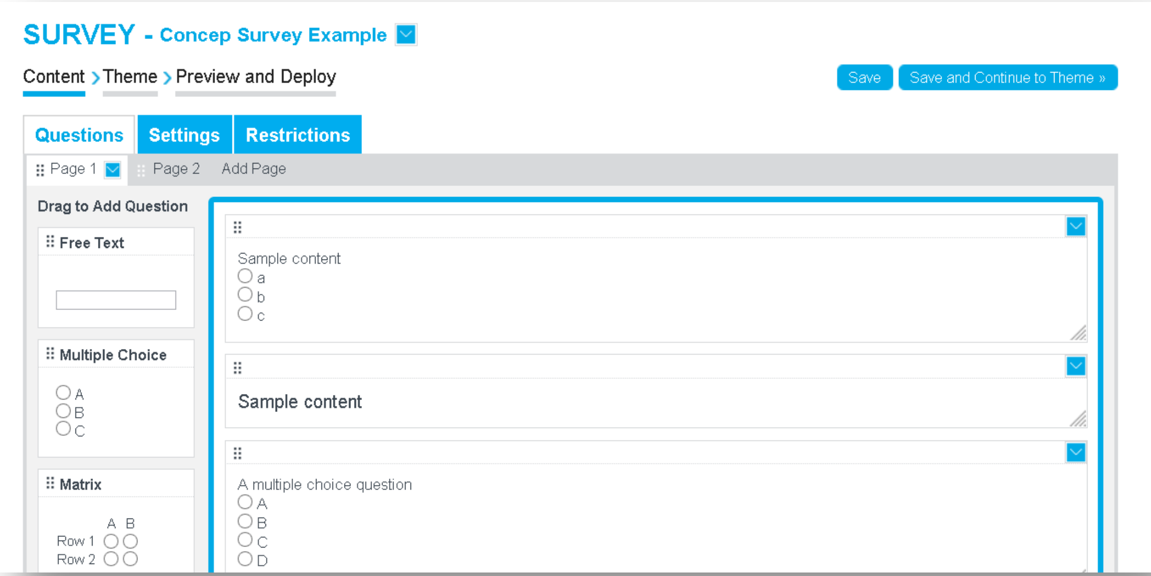
1. CREATING A SURVEY

To start creating your survey, select the **Surveys** tab, click **Create a Survey** and name it.





You will be taken to the Content stage of your Survey, where you can add/edit/delete questions and pages for your survey.



2. QUESTIONS

While in the Content step of a survey, click a question to edit it. You will then be able to select what type of question is required.

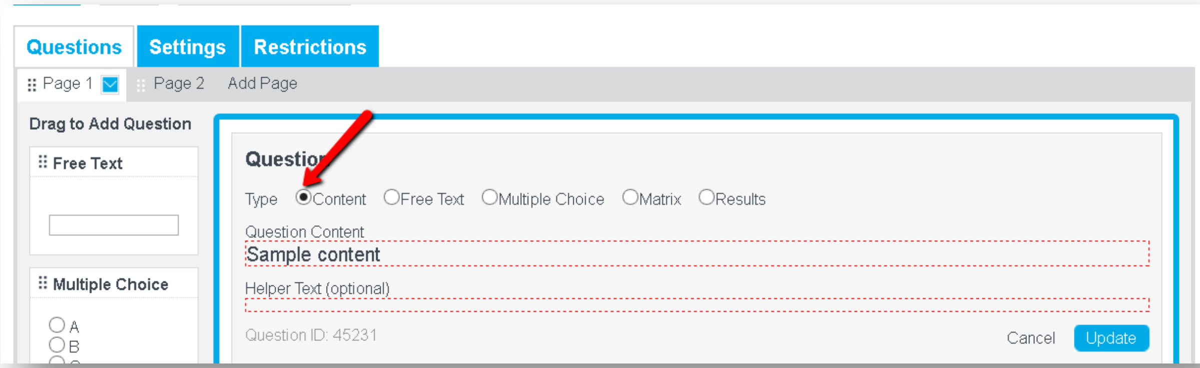
Question types:

- Content
- Free Text
- Multiple Choice
- Matrix
- Results

2.1. Content questions

The content question type allows you to enter text and/or images to display in your survey.

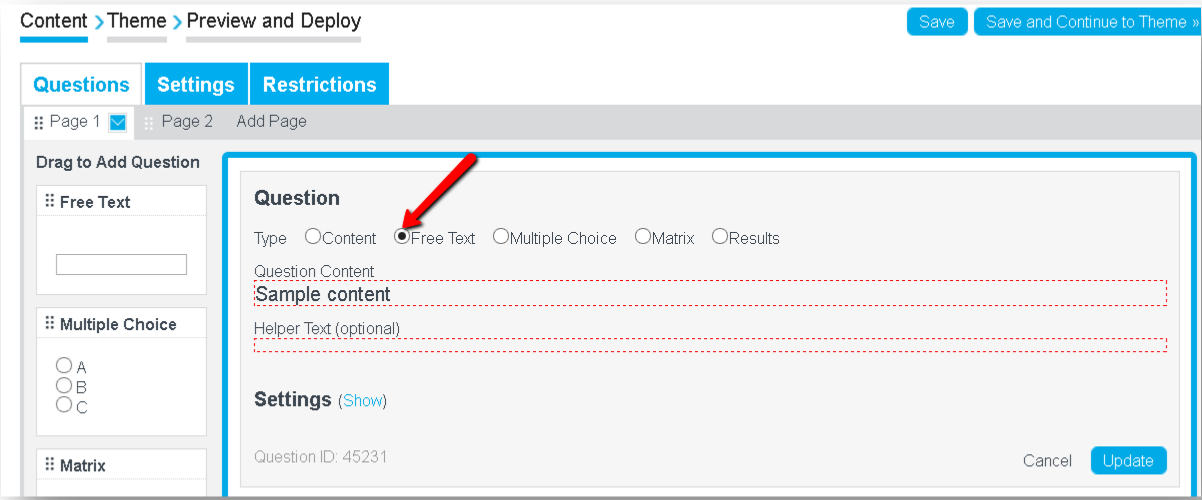
These question types do not collect any data from responders.



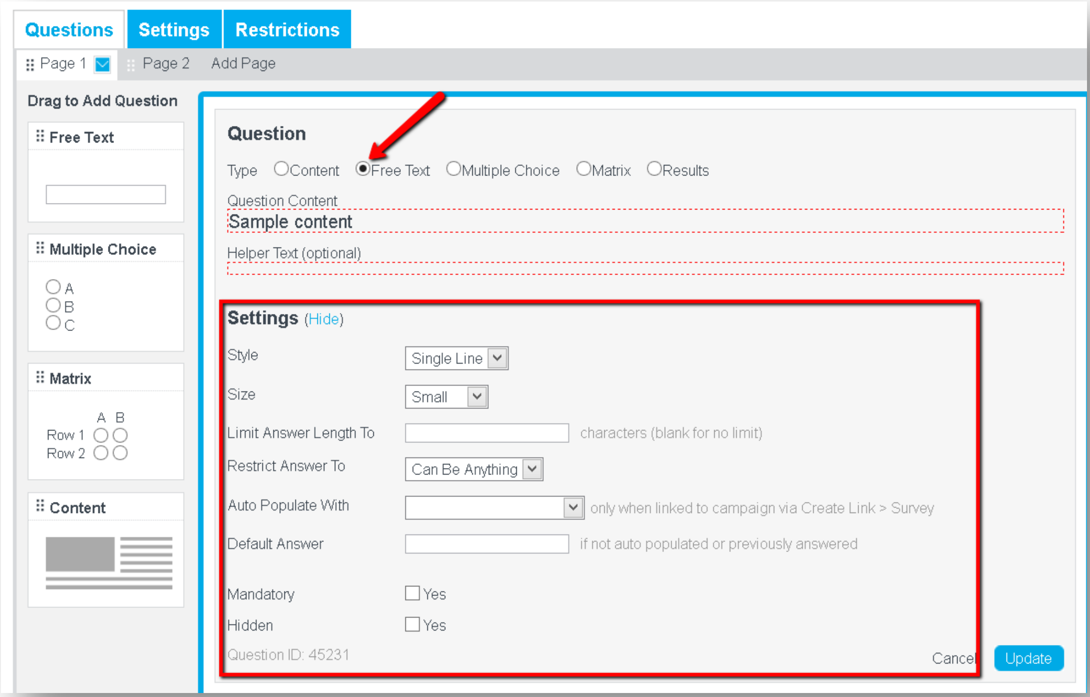
2.2. Free text questions

Free text questions allow responders to enter in their own text-based answers to questions.

Select "Free Text" as the type, and enter your question in the Question Content area.



Click the **Show** text link next to Settings to access additional options:

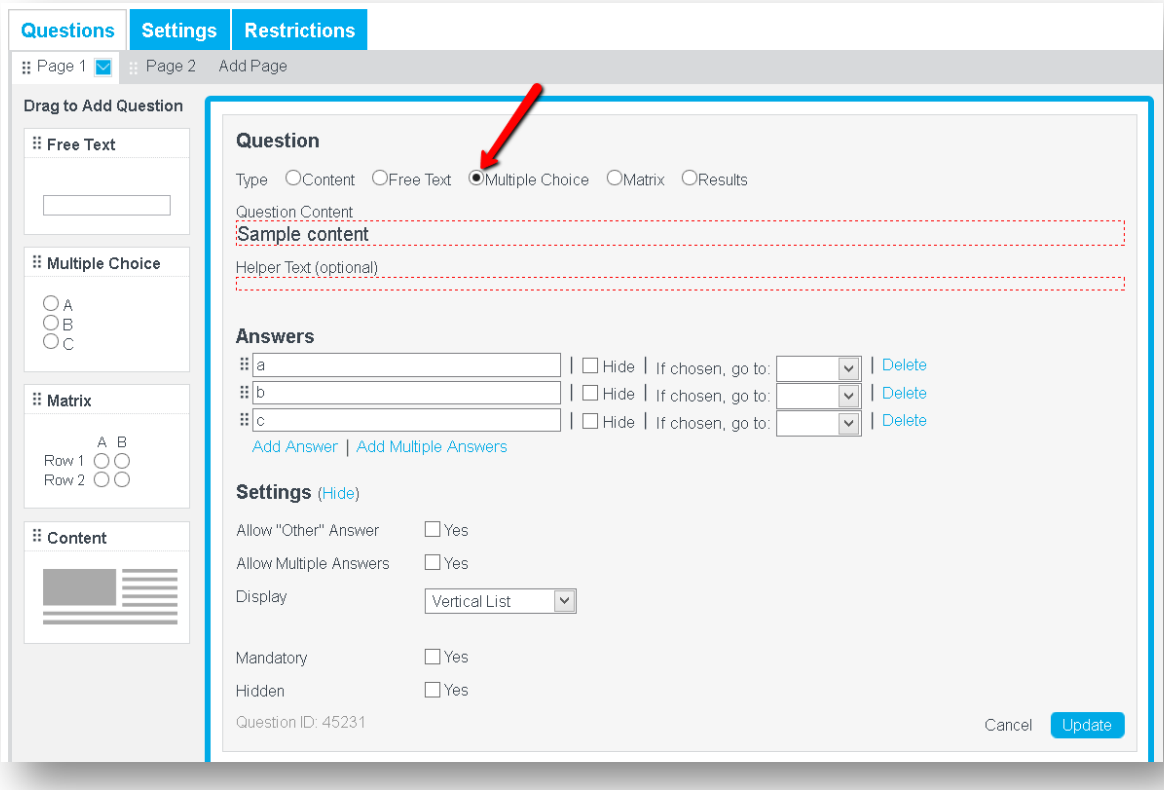


- Style – select the height of the input field box (single line or multi line), or a password style if you wish to restrict access to the survey
- Size – select the overall size of the input field box (large, medium or small)
- Limit Answer Length To – set a maximum number of characters for responders' answers
- Restrict Answer To – set if responders must answer with an email address, URL, date, number or specific item from a list
- Auto Populate With (only available when the survey is deployed using Create Link from Campaign) – pre-fill the answer with a specific field from the contact record
- Default Answer – designate a specific value to pre-fill the answer
- Mandatory – set the question as a required item that responders must complete in the survey
- Hidden – hide the question from responders' view (answers already received to the question will still be correctly shown and reflected in the survey responses)

2.3. Multiple choice questions

Multiple choice questions allow responders to select from available choices as answers to questions.

Select "Multiple Choice" as the type, and enter your question in the Question Content area.



Configure answer choices:

- Use the input field box under Answers to enter the answer choices for the multiple choice question.
- Click the Add Answer text link to add additional answer choices.
- Click the Delete text link to remove an answer choice.
- Click and drag the 6 dots icon to reorder answer choices.
- Check the box next to Hide to remove an answer choice from view but retain responses already recorded.
- Use the If chosen, go to: drop down menu for surveys with multiple paths, so you can redirect responders to a specific page based on their answer to this question.

Click the **Show** text link next to Settings to access additional options:

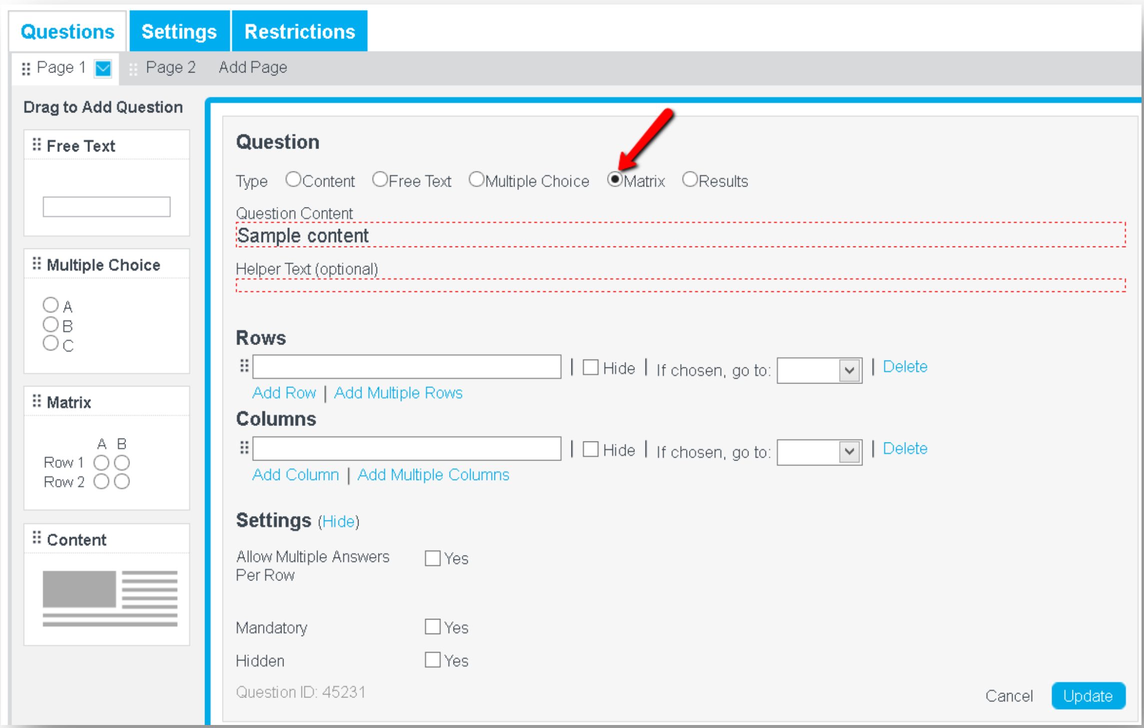
- Allow “Other” Answer – select if responders should be able to select and enter text for an “other” answer option
    - Note you will then also be able to determine the answer text that displays for the “other” option; if the responses entered by responders should be restricted to an email address, URL, date, or number; and if they should be limited in length.
- Allow Multiple Answers – determine if responders should be able to select more than one answer choice

- Display – select how answer choices will be laid out (as a complete list vertically, as a complete list horizontally, or in a drop down menu)
- Mandatory – set the question as a required item that responders must complete in the survey
- Hidden – hide the question from responders' view (answers already received to the question will still be correctly shown and reflected in the survey responses)

2.4. Matrix questions

Matrix questions allow responders to enter answers for multiple categories along a scale of options. This question type is useful in customer satisfaction and performance ratings.

Select "Matrix" as the type, and enter your question in the Question Content area.



Configure answer choices:

- Use the input field box under Rows to enter the categories for the matrix question (these are the items that will be listed down the page – such as Quality, Price, Service).
- Use the input field box under Columns to enter the titles for the scale (these are the options that will be listed across the page – such as Excellent, Good, Poor).
- Click the Add Row or Add Column text link to add additional categories or scale options.
- Click the Delete text link to remove a category or scale option.
- Click and drag the 6 dots icon to reorder.

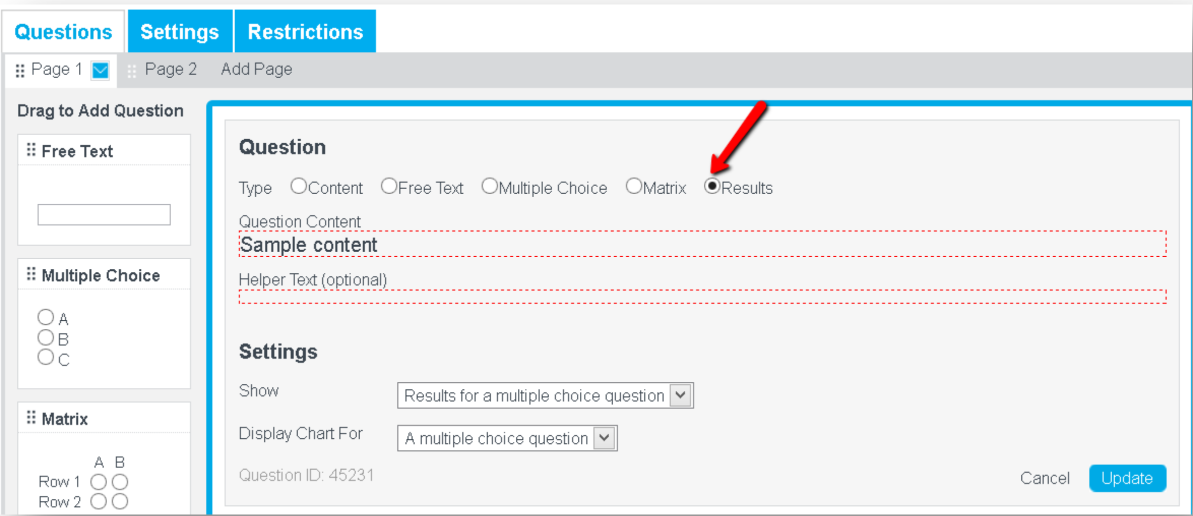
- Check the box next to Hide to remove an answer choice from view but retain responses already recorded.
- Use the If chosen, go to: drop down menu for surveys with multiple paths, so you can redirect responders to a specific page based on their answer to this question.

Click the **Show** text link next to Settings to access additional options:

- Allow Multiple Answers Per Row – determine if responders should be able to select more than one answer choice
- Mandatory – set the question as a required item that responders must complete in the survey
- Hidden – hide the question from responders' view (answers already received to the question will still be correctly shown and reflected in the survey responses)

2.5. Results questions

The results question type allows you to display a graph of already submitted answers to multiple choice questions within the survey content.



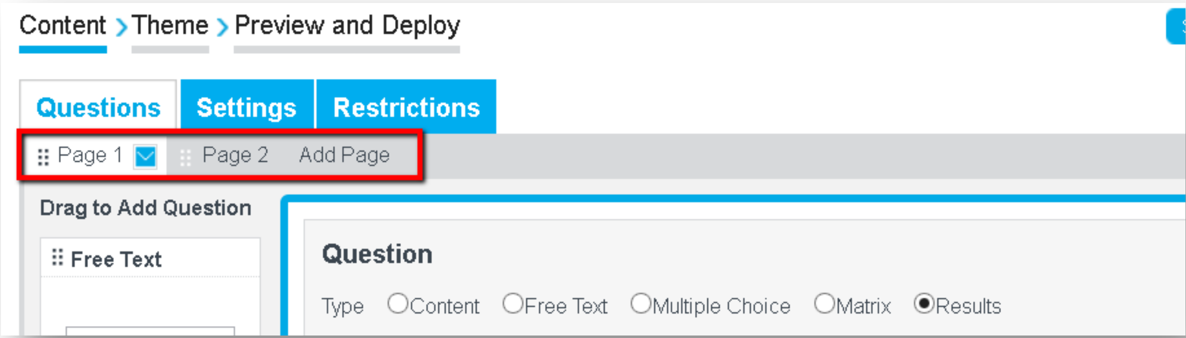
Each results question can only graph the results for one multiple choice question. These question types do not collect any data from responders.

3. PAGES

Once all questions on a page have been added you can add further pages to your Survey if required.

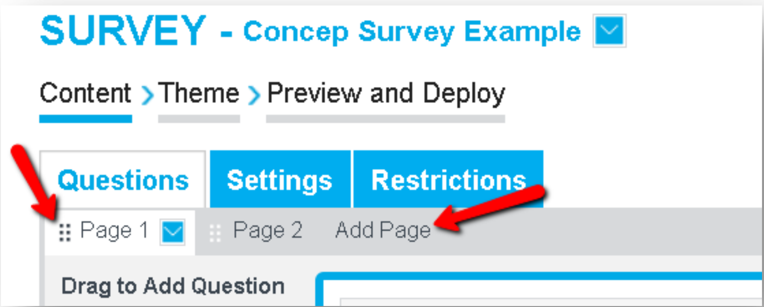
Each survey must include a minimum of two pages – a page with the questions and a confirmation page to display after a respondent has completed the survey.

By default, these two pages are pre-created for you and named Page 1 and Page 2.



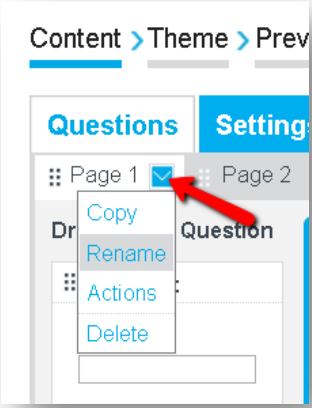
3.1. Page Options

While in the Content step of a survey, click the Add Page text link to add an additional page to the survey.



Click and drag the 6 dots icon to re-order pages. Click on a page name to view the questions on that page.

Click the down arrow icon next to a page's name to access additional options:



- Copy – copy the page, its questions and any associated actions to create a new page with the same content (the page will be added as the last page and can be moved as needed)
- Rename – change the name of the page as it is stored in your account
    - Note this will not change the window title that appears at the top of the browser window when recipients view the survey. Edit the collector to modify the window title.
- Actions – add an action to the page
- Delete – delete the page and all questions and actions associated with it

4. ACTIONS

Actions allow you to setup automatic functions to be performed after a page is successfully completed in the survey.

For example, you could setup an action to automatically add the responders to a “Sign Up for My Newsletter” survey to the Contacts section of your account, or you could setup an action to automatically email any responses received.

To add an action to a page of questions:

1. While in the Content step of a survey, click the down arrow icon next to a page’s name, and select Actions.
2. Select an action type: Add a contact, Send a campaign, Send notification email, Redirect to page, Redirect to URL.
3. Configure the action, and click the **Update** button when complete.
4. Click the **Save** button on the survey to ensure your changes are applied to the live survey.

To modify or remove an action once it has been added to the survey:

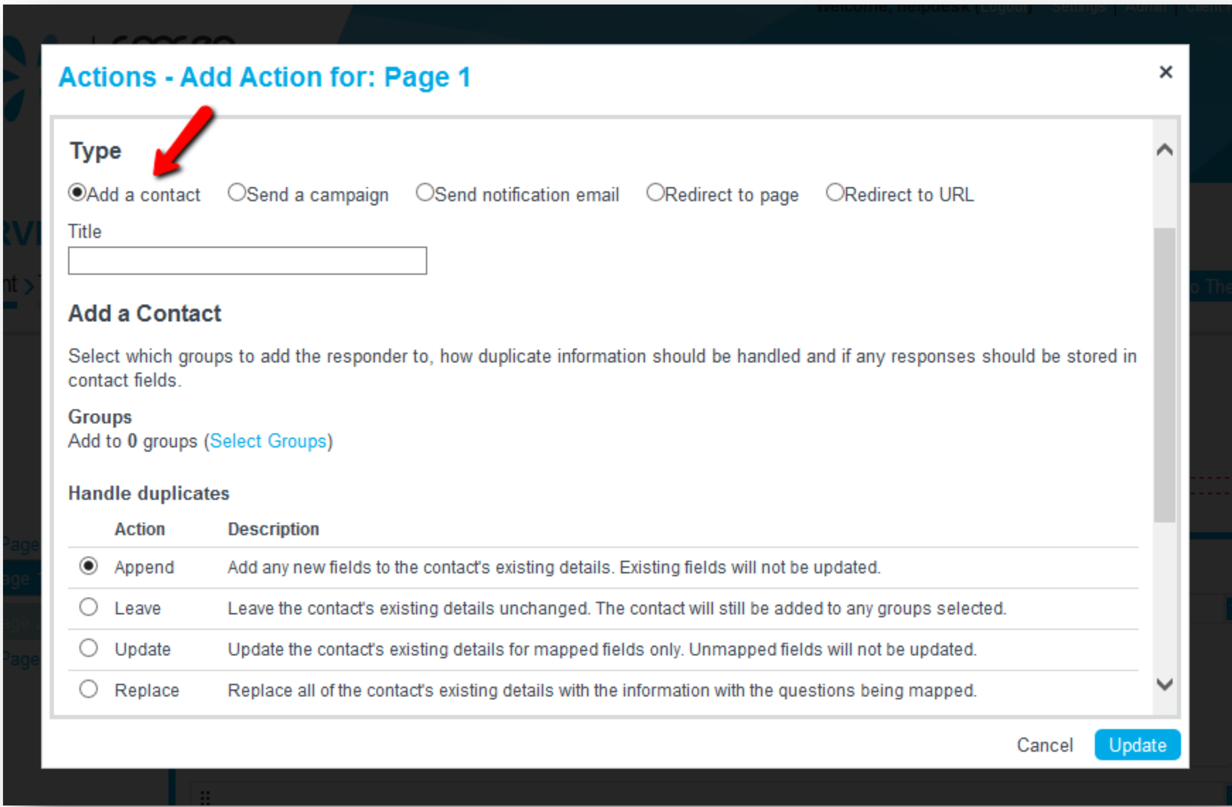
1. Click the down arrow icon next to a page’s name, and select Actions.

2. Then click the down arrow icon next to the action you wish to modify or remove, and select Edit or Delete.
3. Click the Close text link to close the window, and then click the Save button on the survey to ensure your changes are applied.

4.1. Add a Contact

Use this action type to save the responses received in the survey as a contact record in your account:

- Click the radio button next to the Add a Contact option.



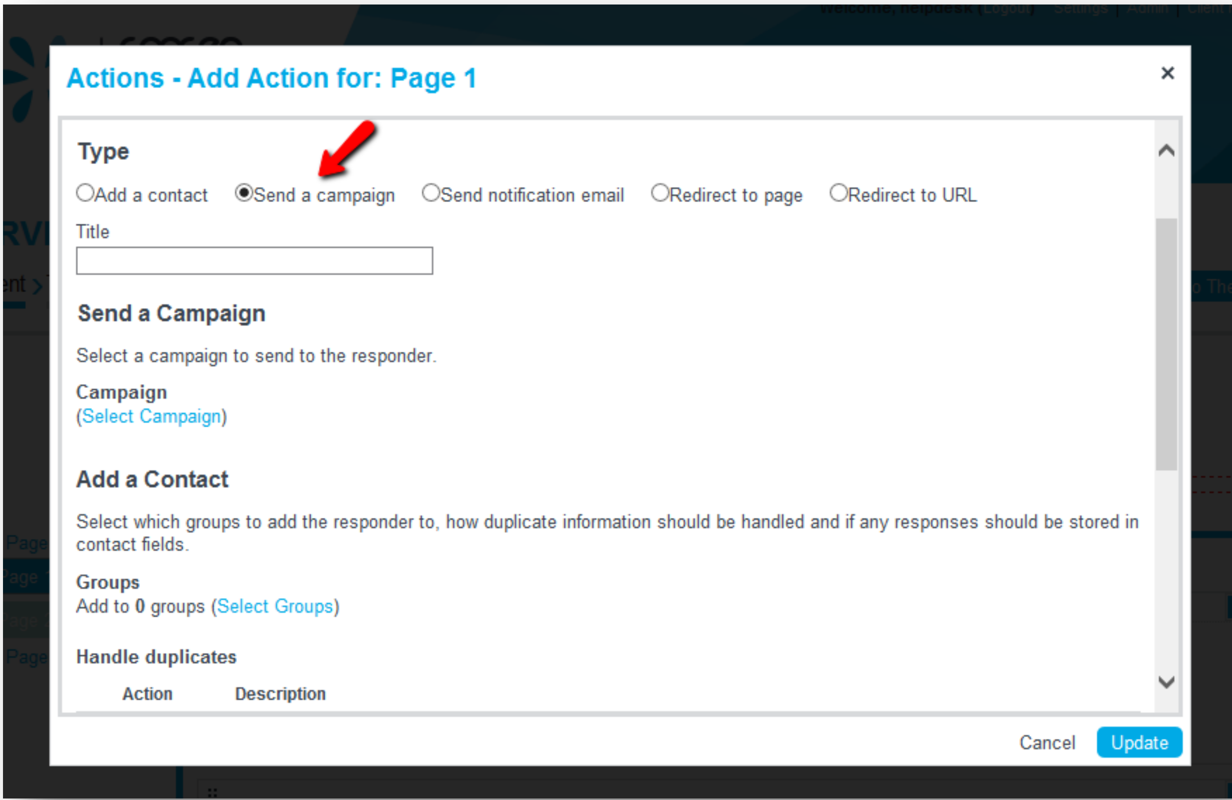
- Enter a title for the action, such as “Store contact details”.
- Click the Select Groups text link to choose the group(s) the contact details should be stored in, and/or click the Add Group text link in the window that appears to add a new group(s). Click the Select button when all groups have been selected.
- Choose how any duplicate contacts should be handled (Append, Leave, Update or Replace).
- Map the survey questions to specific fields in the Contacts section of your account. *Note at least one survey question must be mapped to the Email field, as that is the unique identifier for all contact records in your account.*

- Specify when the action should be triggered. The default condition is upon page completion, but you could set specific condition(s) so that the action is only triggered when a certain answer choice is selected.
- Once all selections have been completed, click the Update button.

4.2. Send a Campaign

Use this action type to send a campaign to responders:

- Click the radio button next to the Send a Campaign option.



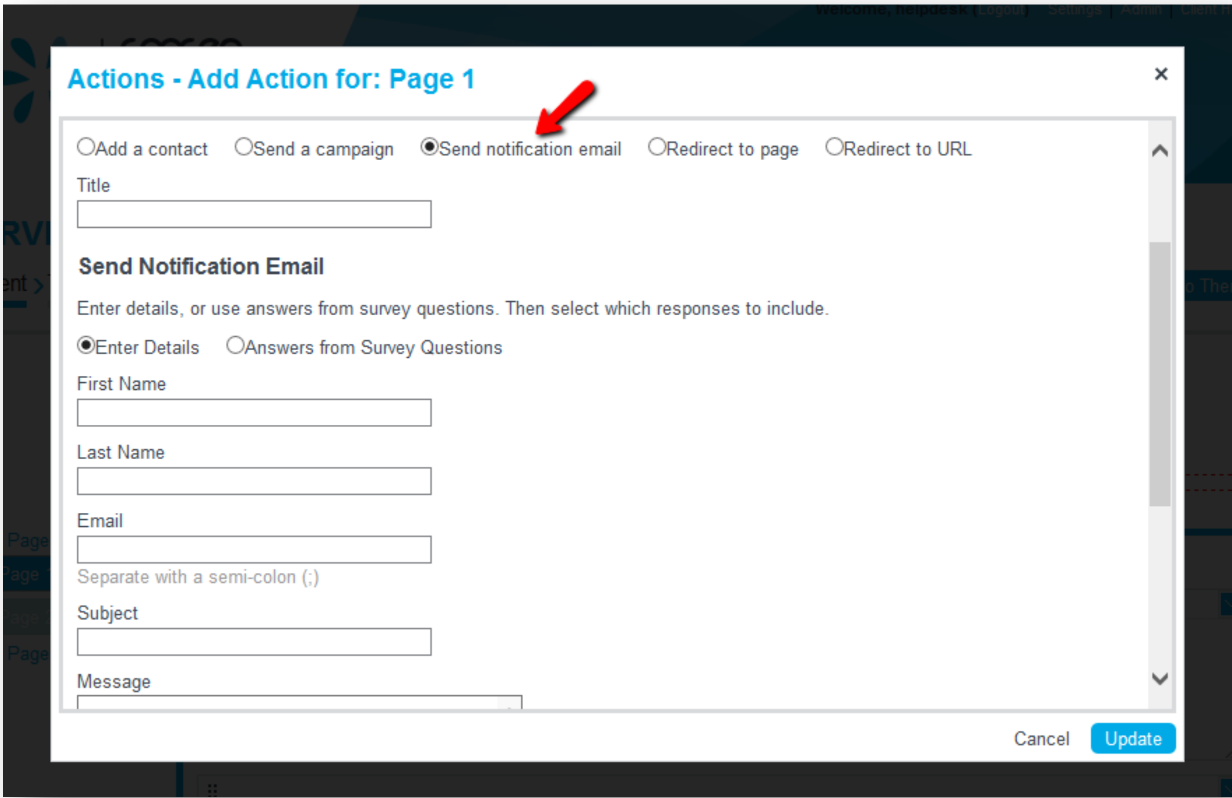
- Enter a title for the action, such as "Send welcome email".
- Click the Select Campaign text link to choose the campaign that should be sent to responders, and then click the Select button.
- Click the Select Groups text link to choose the group(s) the contact details should be stored in, and/or click the Add Group text link in the window that appears to add a new group(s). Click the Select button when all groups have been selected.
- Choose how any duplicate contacts should be handled (Append, Leave, Update or Replace).
- Map the survey questions to specific fields in the Contacts section of your account. *Note at least one survey question must be mapped to the Email field, as that is the unique identifier for all contact records in your account.*

- Specify when the action should be triggered. The default condition is upon page completion, but you could set specific condition(s) so that the action is only triggered when a certain answer choice is selected.
- Once all selections have been completed, click the Update button.

4.3. Send Notification Email

Use this action type to send an email to designated email address(es) or the responders themselves outlining the questions and answers as each response is recorded:

- Click the radio button next to the Send a Notification email option.



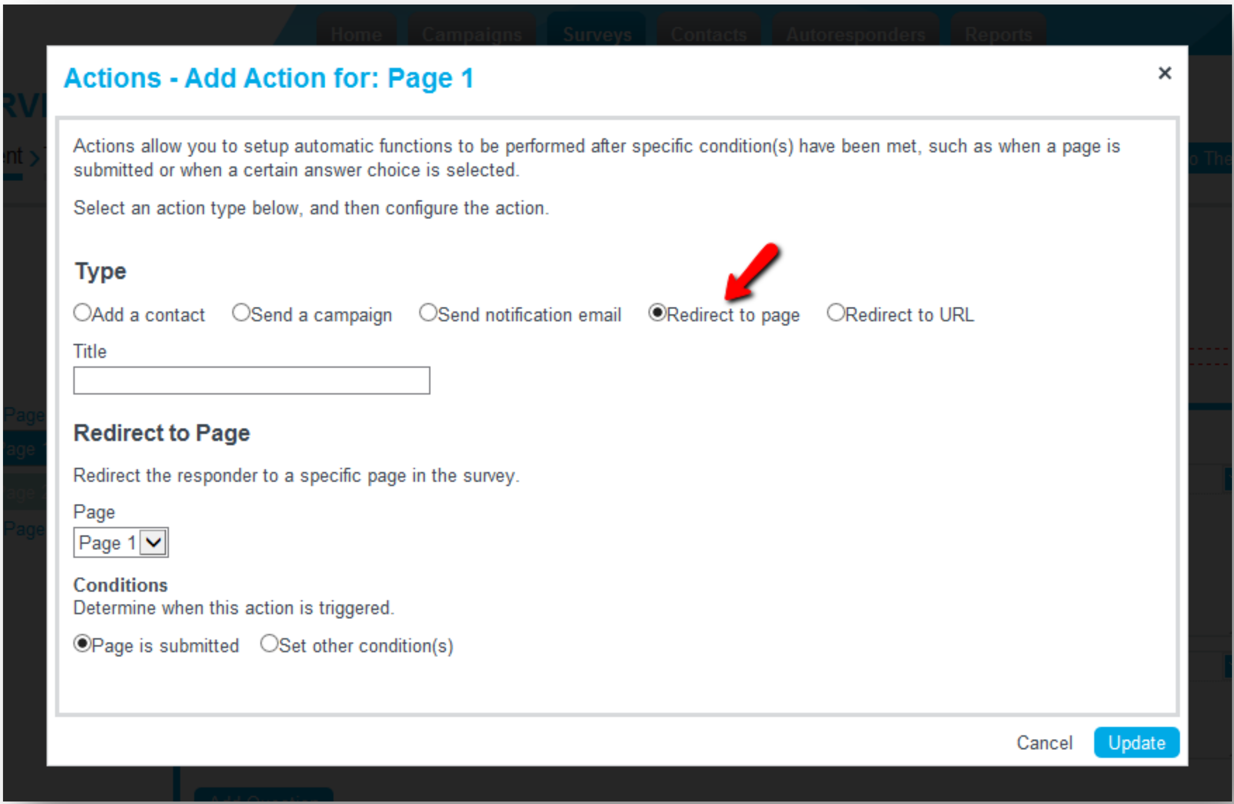
- Enter a title for the action, such as "Send notice email to team" or "Send confirmation email to responder".
- To send the notification email to designated email address(es), keep the radio button next to the Enter Details option selected.
  - Enter a first and last name for the recipient of the notification email.
  - Enter a single email address for the recipient of the notification email, or enter multiple email addresses separated by a semi-colon (;).
- Or to send the notification email to the responders themselves based on question answers in the survey, click the radio button next to the Answers from Survey Questions option.

- Select the free text question to be used for the First Name, Last Name and Email Address fields.
  Note: questions selected for this purpose must be free text type, set to mandatory, not hidden, and for the Email Address field have the answer restricted to an email address.
- Enter a subject line and message to appear at the top of the notification email.
- Select the survey questions and responses that should be included in the notification email.
- Specify when the action should be triggered. The default condition is upon page completion, but you could set specific condition(s) so that the action is only triggered when a certain answer choice is selected.
- Once all selections have been completed, click the Update button.

4.4. Redirect to Page

Use this action type to redirect responders to a different page in the survey once this page has been completed. This type of action can be useful for surveys that could include multiple paths, i.e. where responses to earlier questions affect which questions the responders see later in the survey:

- Click the radio button next to the Redirect to Page option.



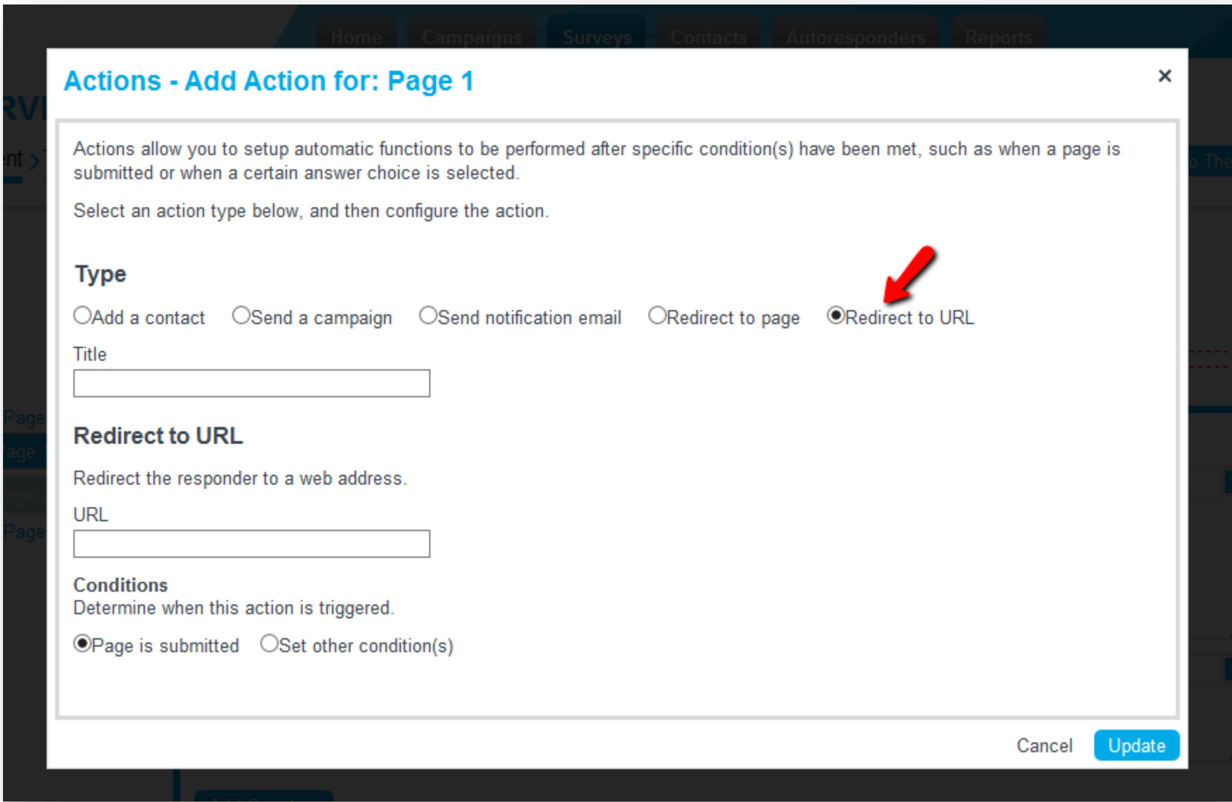
- Enter a title for the action, such as “Move respondent to Afternoon Session page”.

- Select a page from the drop down menu to redirect responders to once this page is successfully completed.
- Specify when the action should be triggered. The default condition is upon page completion, but you could set specific condition(s) so that the action is only triggered when a certain answer choice is selected.
- Once all selections have been completed, click the Update button.

4.5. Redirect to URL

Use this action type to redirect responders to an external web address or URL once this page has been completed:

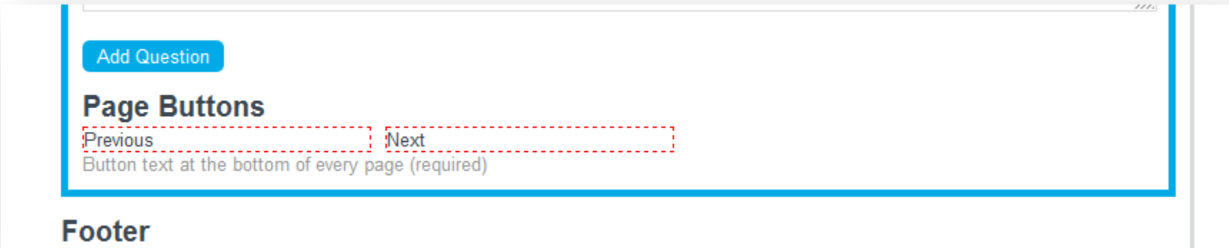
- Click the radio button next to the Redirect to URL option.



- Enter a title for the action, such as “Launch landing page”.
- Enter the web address or URL that responders should be redirected to once this page is successfully completed.
- Specify when the action should be triggered. The default condition is upon page completion, but you could set specific condition(s) so that the action is only triggered when a certain answer choice is selected.
- Once all selections have been completed, click the Update button.

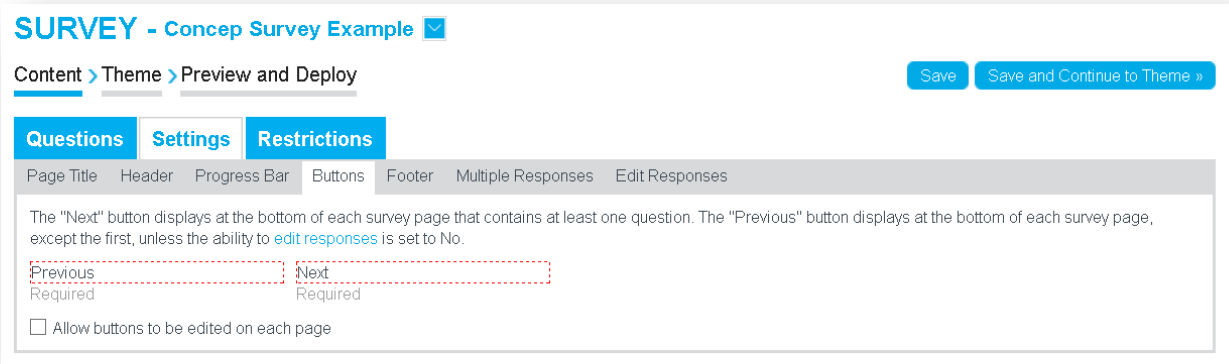
5. SURVEY BUTTONS

By default, a survey will include “Previous” and “Next” buttons at the bottom of pages to allow responders to navigate through the survey.



In order to change these default options you can navigate to the Settings tab, then the Buttons tab and here you can simply enter the areas and change as needed. E.g. you may need to change the “next” button to a “submit” button.

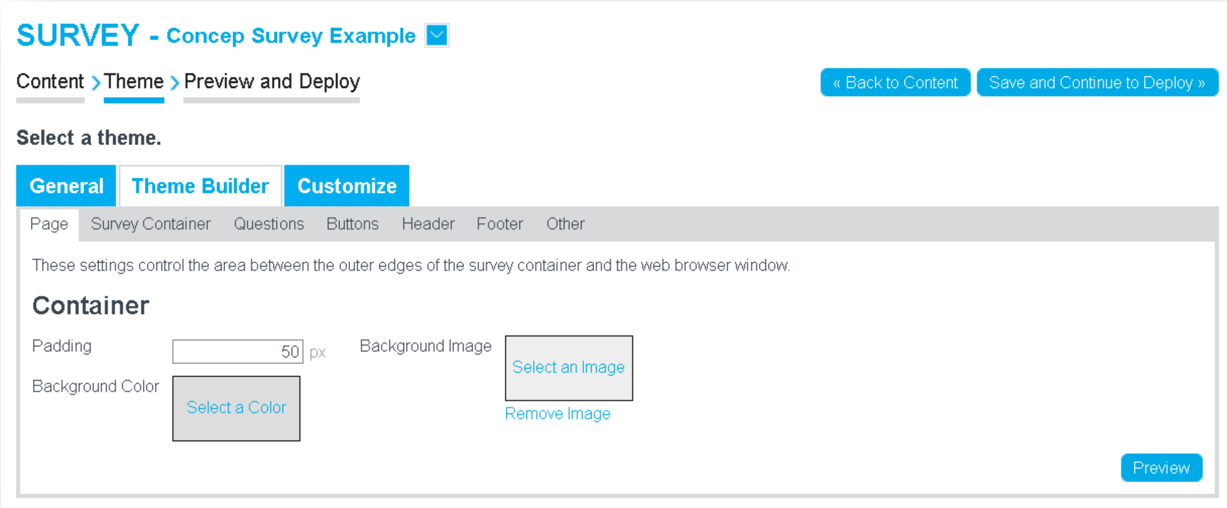
You can also check the “Allow buttons to be edited on each page” option in your settings. This will allow you to change these default buttons on each page my clicking into the editable area.



The "Next" button will automatically display on the first page and any other page that has questions to collect data from responders. The "Previous" button is controlled by collector settings (please refer to section 7.2 which explains the collector settings).

6. THEME

After editing all of your questions, click the **Save and Continue to Theme** button or the **Theme** step in the survey creation process navigation menu.

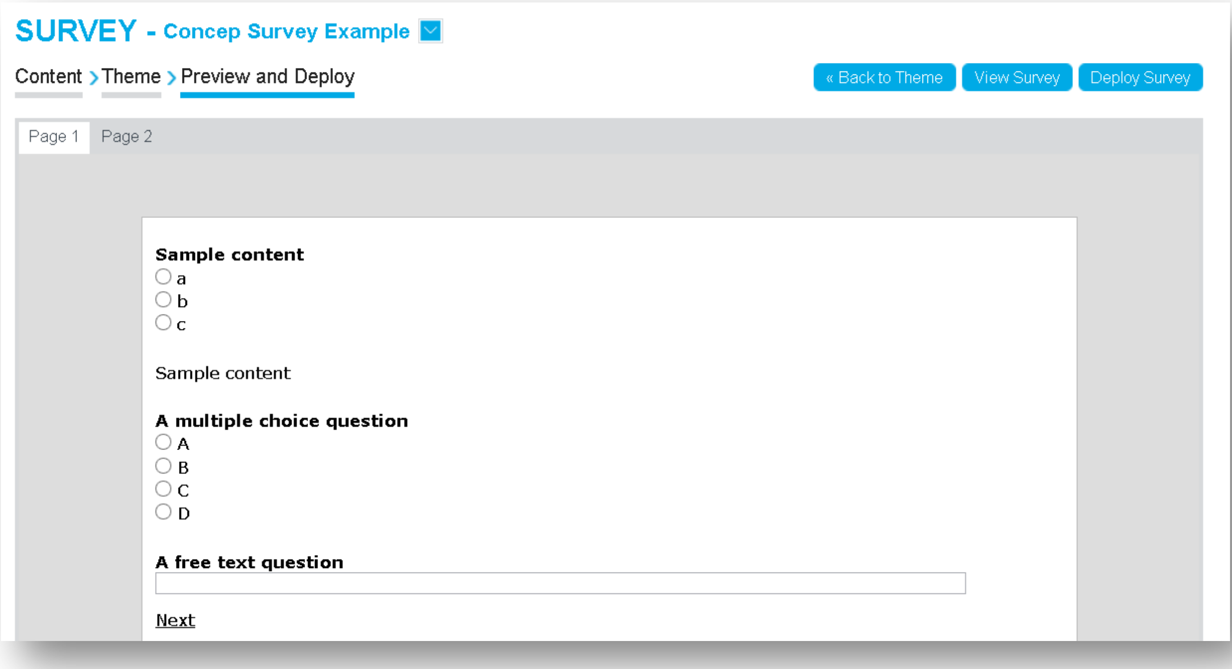


Click on a theme name to preview it in the lower half of the screen. Your account may include several pre-built themes. You may also have access to modify the CSS and build your own theme.

Once you are happy with the theme, click the **Save and Continue to Deploy** button, or the **Preview and Deploy** step in the survey creation process navigation menu.

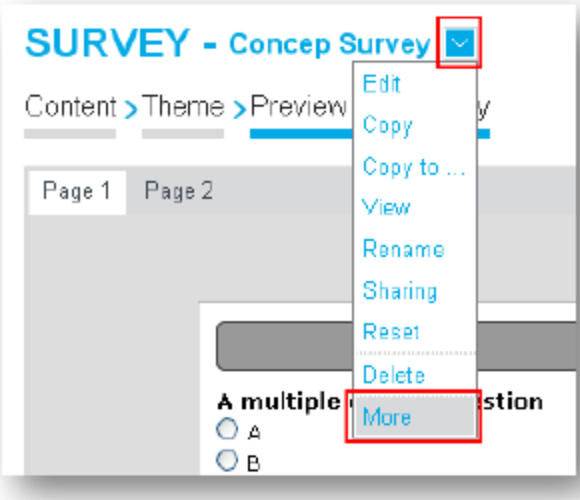
7. PREVIEW AND DEPLOY

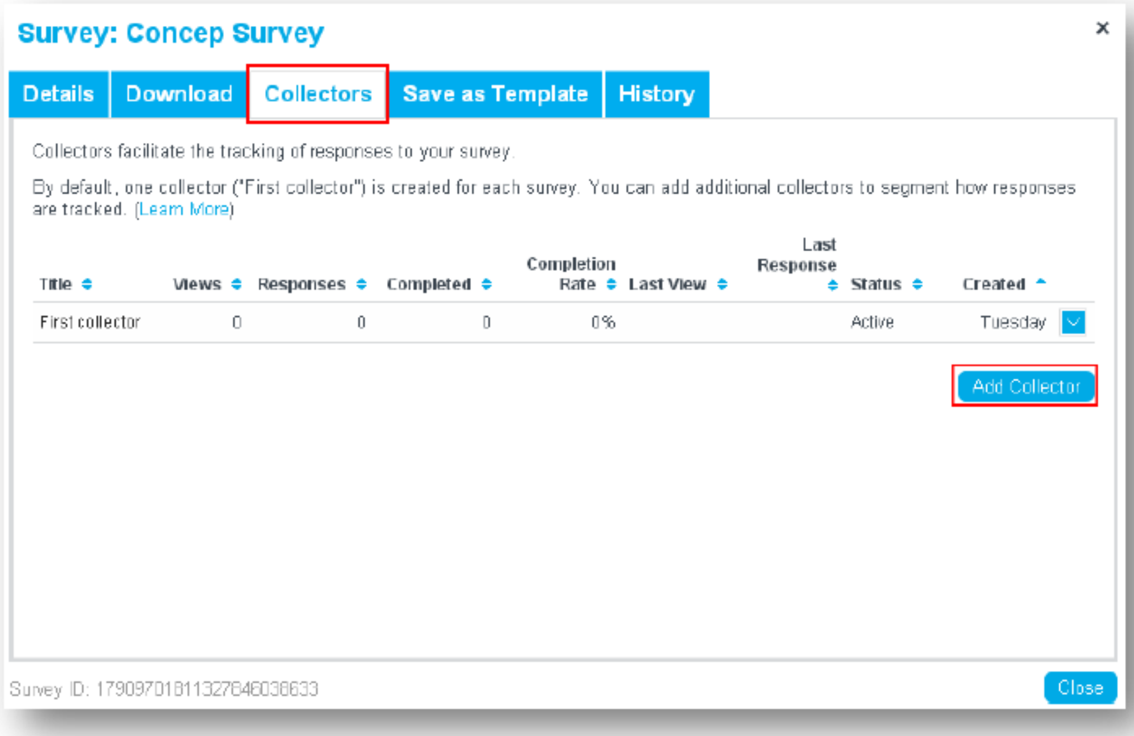
In the Preview and Deploy stage you can preview the survey you have created and check to ensure it is formatted and presented as you had intended.



8. COLLECTORS

Collectors are used to collect survey responses once they are deployed.
As a default the first collector is automatically generated for you. You can access this first collector by using the main blue drop down and navigating to "More" and then "Collectors".
This collector will store all your survey responses for analysis.

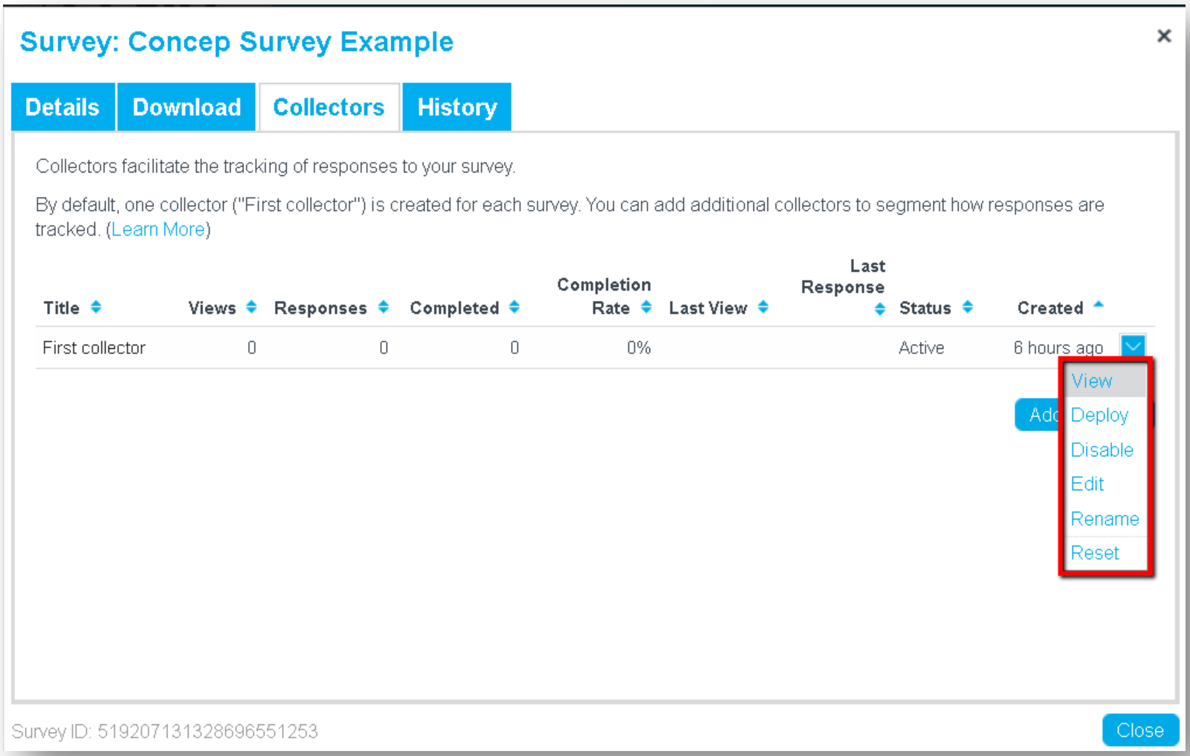




You can deploy the survey using this single collector, or you can create additional collectors if you wish to track sub-sets of responders separately. For instance, if you create a customer satisfaction survey, you may want to then setup different collectors for each year. That way all responses are stored together, but can also be reviewed and segmented by year. Another example is if you wanted to deploy the survey in different locations, for example via campaign or via your website. Creating a collector for each will allow you to separate responses by the two different methods.

8.1. Collector Options

Click the down arrow icon next to a collector's name to access additional options:



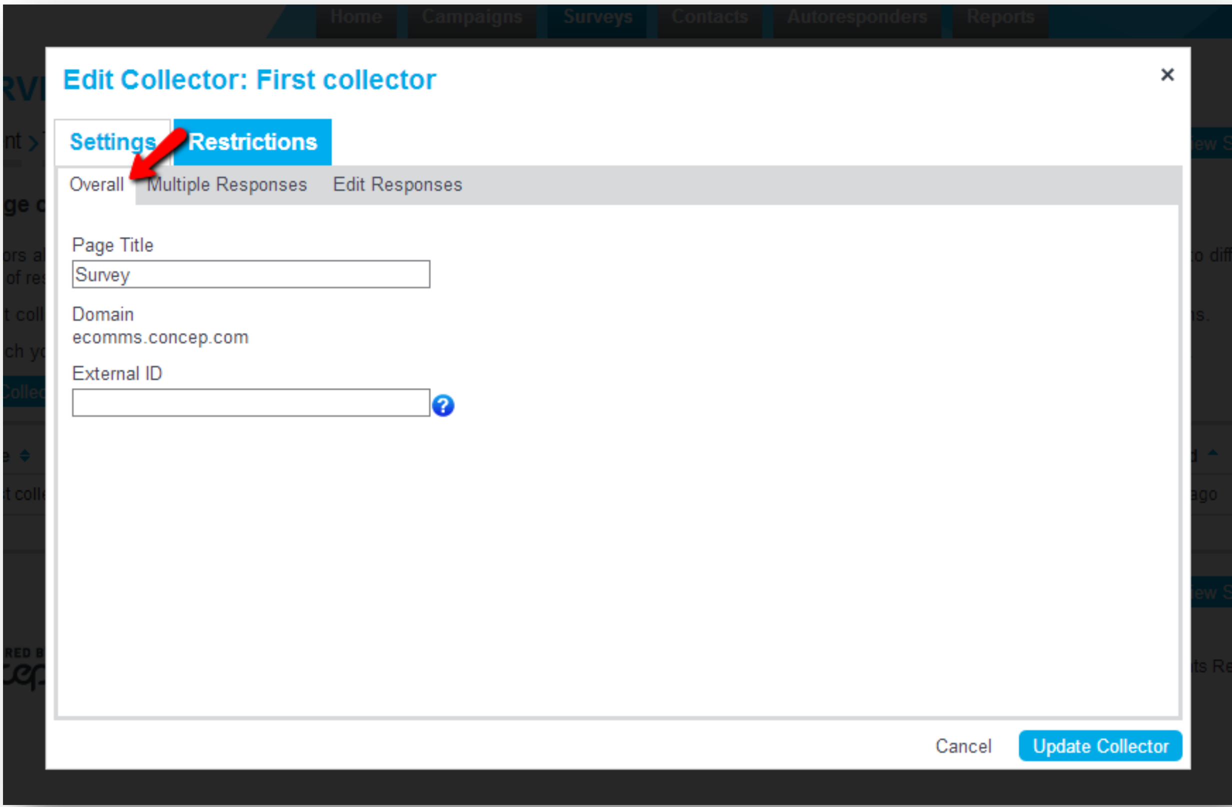
- View – view the survey using the selected collector
- Deploy – access options to deploy the survey
- Disable/Activate – disable an active collector, or activate a disabled collector
- Edit – edit the settings and restrictions for a collector
- Rename – change the name of the collector as it is shown in your account
- Reset – delete all views, responses and other statistics regarding the survey

8.2. Collector Settings

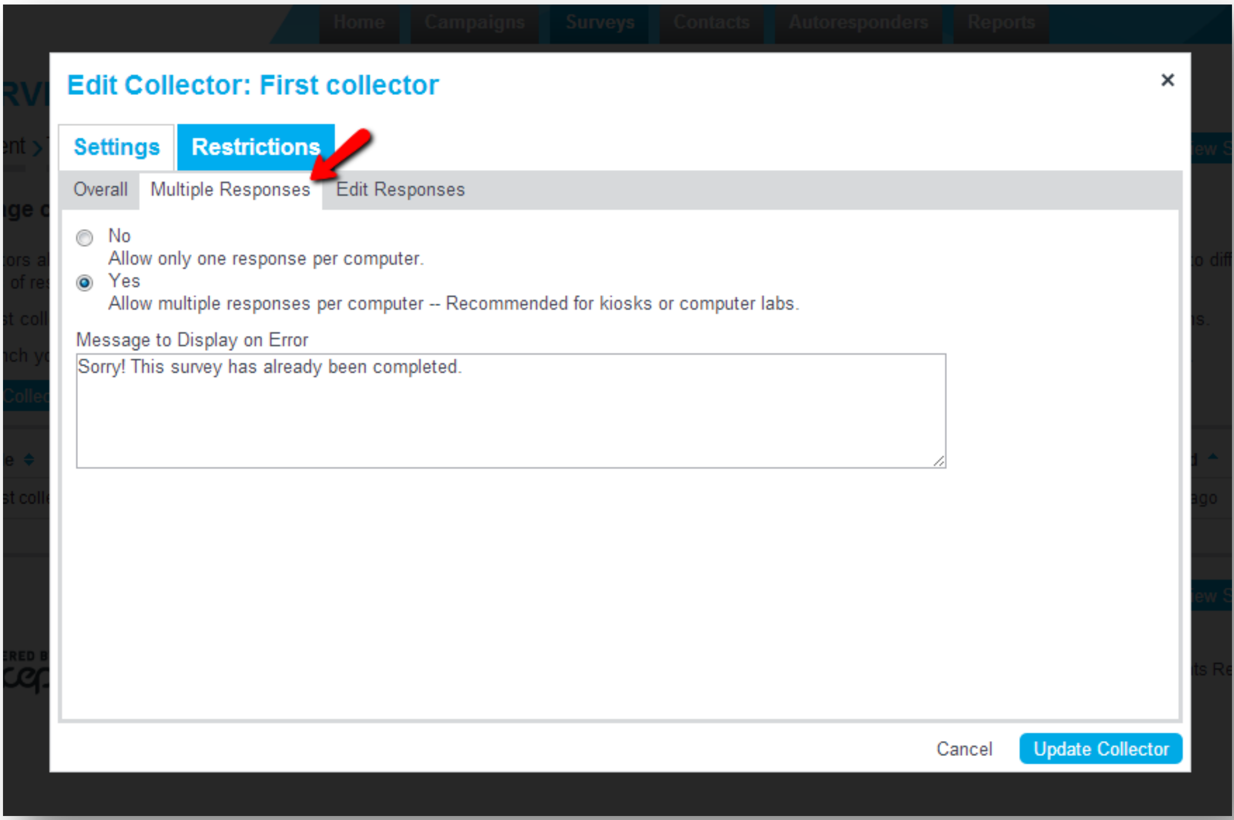
The settings for a collector control how the survey appears and functions.

To edit the settings for a collector:

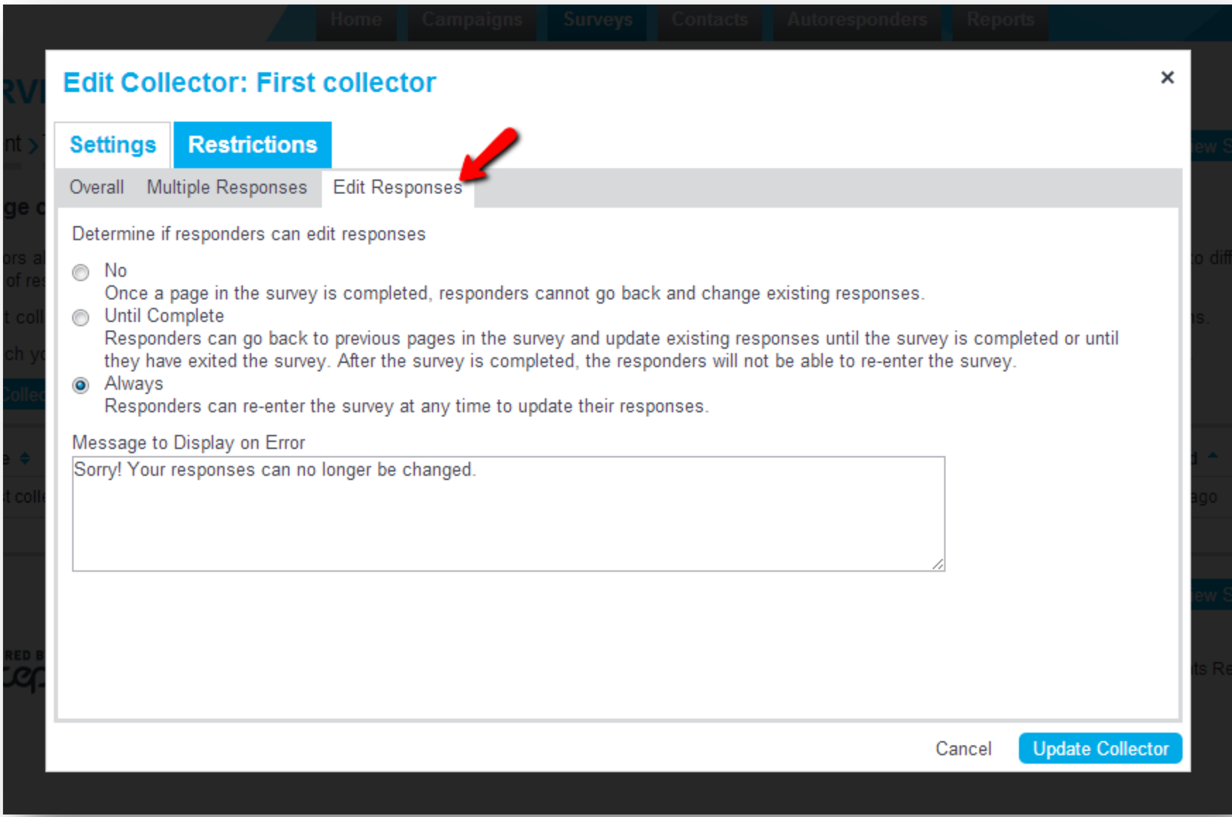
1. Click the down arrow icon next to a collector and select Edit.
2. Click on a sub-navigation item to access additional settings.
   - Under **Overall** tab, you can modify:
     - Page Title – modify the title that displays at the top of the browser window when responders are viewing the survey
     - External ID – assign an external ID to the survey (used for integrations and other third party connections to the survey)



- Under **Multiple Responses**, you can control whether multiple responses can be completed from the same computer:
  - No – only allows only one response per computer
  - Yes – allows multiple responses per computer (default)
  - Message to Display on Error – modify the message that would display on the page in the event multiple responses are not allowed from the same computer and a respondent attempted to answer the survey twice



- Under **Edit Responses**, you can control whether responders can modify their answers (and also whether or not the "Previous" button will display):
    - No – once a page has been completed, responders cannot modify answers (the “Previous” button will not display)
    - Yes, Until Complete – responders can modify answers until they reach the final page in the survey (the “Previous” button will display on any page after the first, but not on the final page of the survey)
    - Always – responders can modify answers and/or re-enter the survey at any time (the “Previous” button will display on all pages after the first)
    - Message to Display on Error – modify the message that would display on the page in the event multiple responses are not allowed from the same computer and a respondent attempted to answer the survey twice



3. After you have made your desired changes, click the **Update Collector** button.

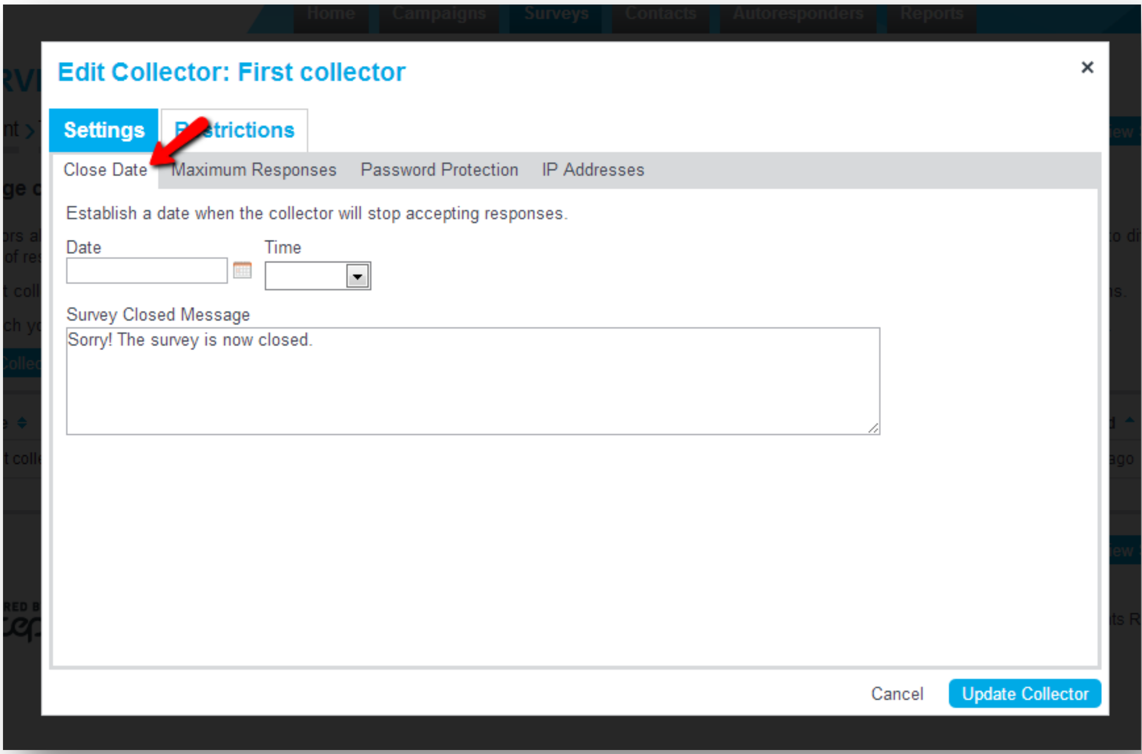
To modify how the "Previous" button in the survey displays, refer to the "Edit Responses" section above.

8.3. Collector Restrictions

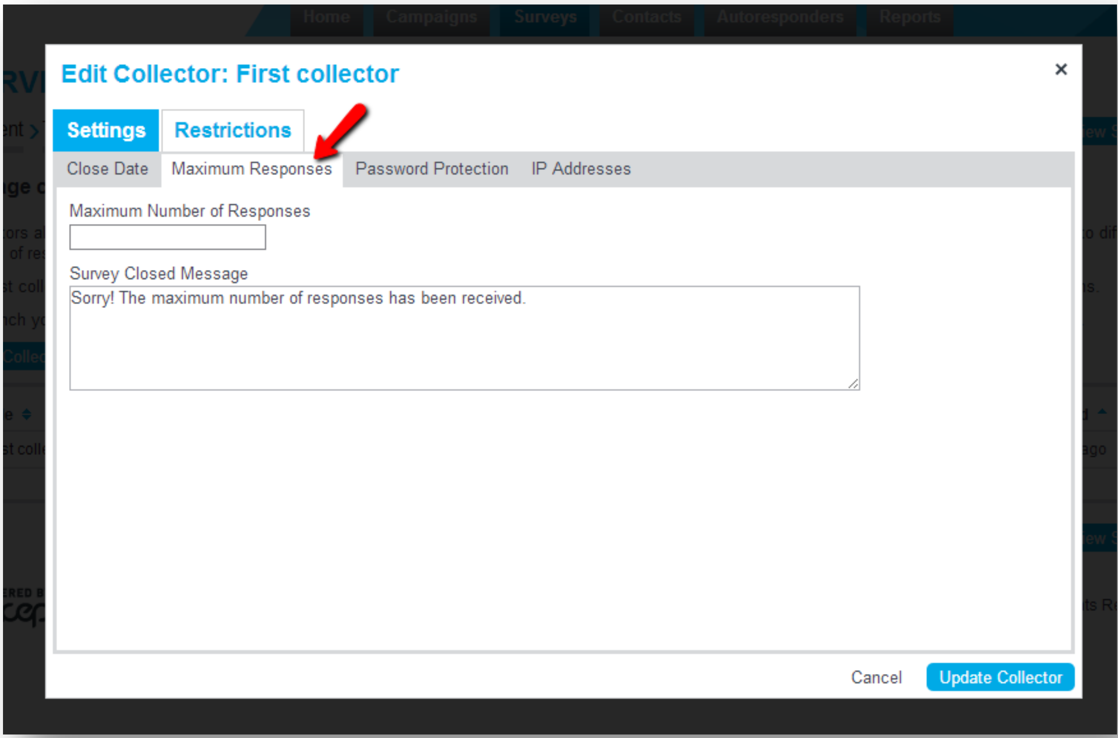
The restrictions for a collector control how the collector appears and functions.

To edit the restrictions for a collector:

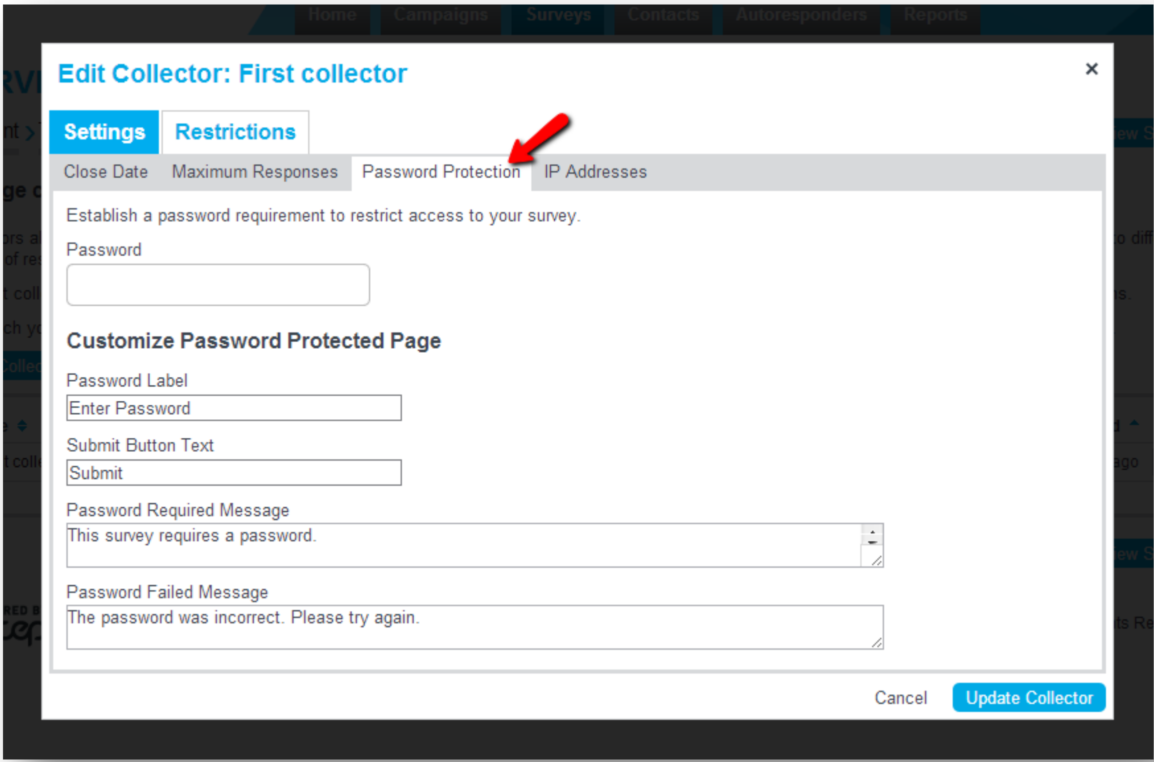
1. Click the down arrow icon next to a collector and select **Edit**.
2. Click the **Restrictions** tab.
3. Click on a sub-navigation item to access additional settings.
   - **Close Date** – set a date and time in the future when the collector will stop accepting new survey responses. You can also modify the error message that will display after that date and time.



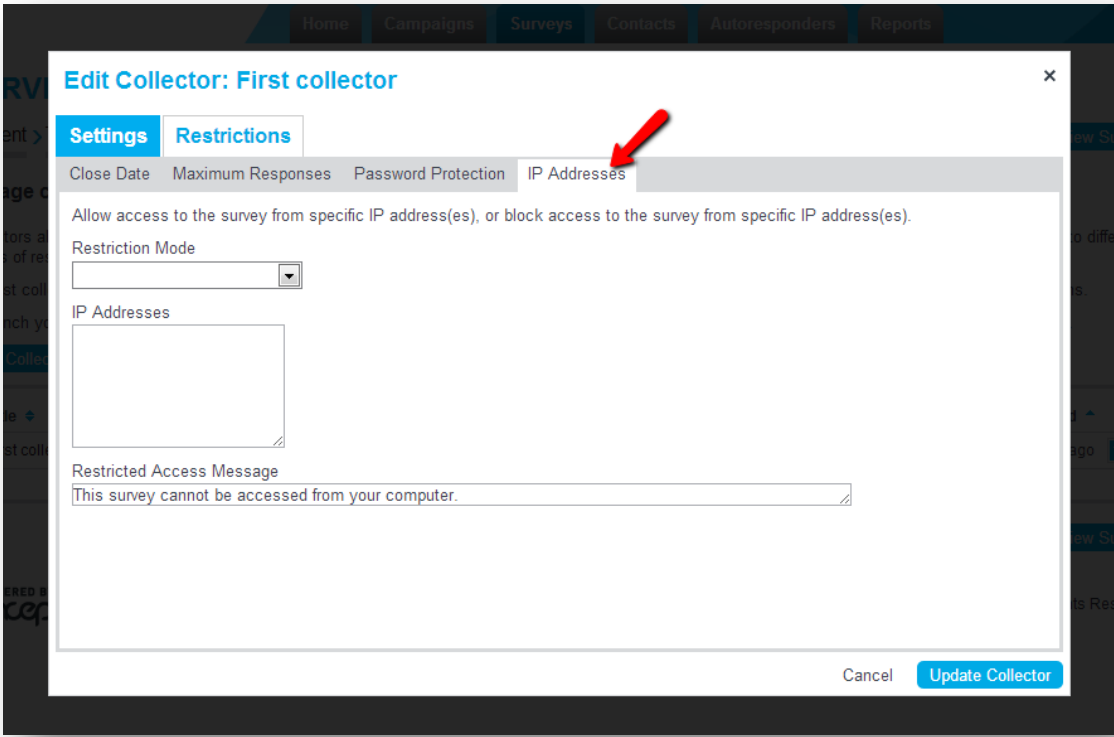
- **Maximum Responses** – set a specified number of responses that will be accepted for the survey (for instance if a limited number of seats are available for an event). You can also modify the error message that will display after the maximum number of responses have been received.



- **Password Protection** – display a page before the survey is viewable that requires responders to enter a password. Establish a password, and modify the text that will display on that page.



- **IP Addresses** – restrict access to the survey from designated IP address(es), or block access to the survey from designated IP address(es). You can also modify the message that will display in the event of an error.



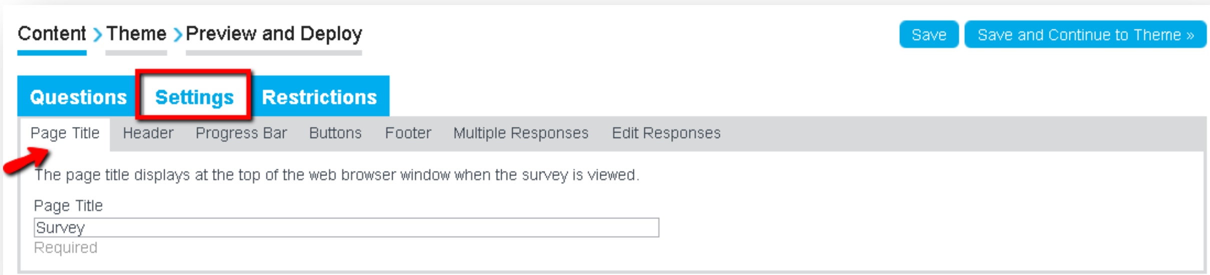
4. After you have made your desired changes, click the **Update Collector** button.

9. SURVEY SETTINGS

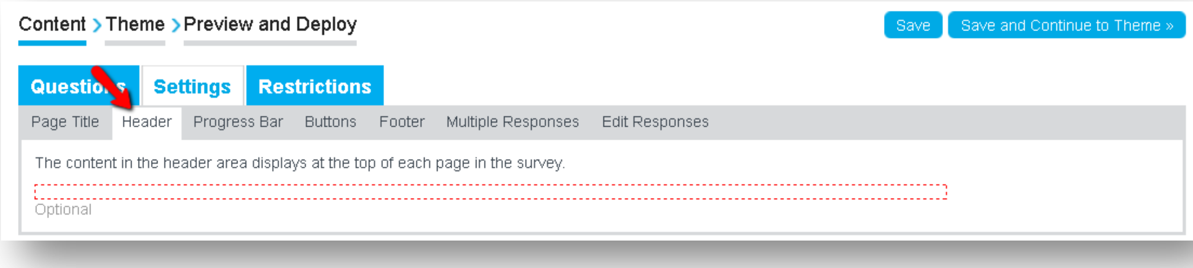
The settings control some further elements of how the survey appears and functions.

To edit the settings for a complete survey:

1. Click the settings tab in the content stage of a survey.
2. Click on a sub-navigation item to access additional settings.
   - Under **Page Title** tab, you can modify:
     - Page Title – modify the title that displays at the top of the browser window when responders are viewing the survey

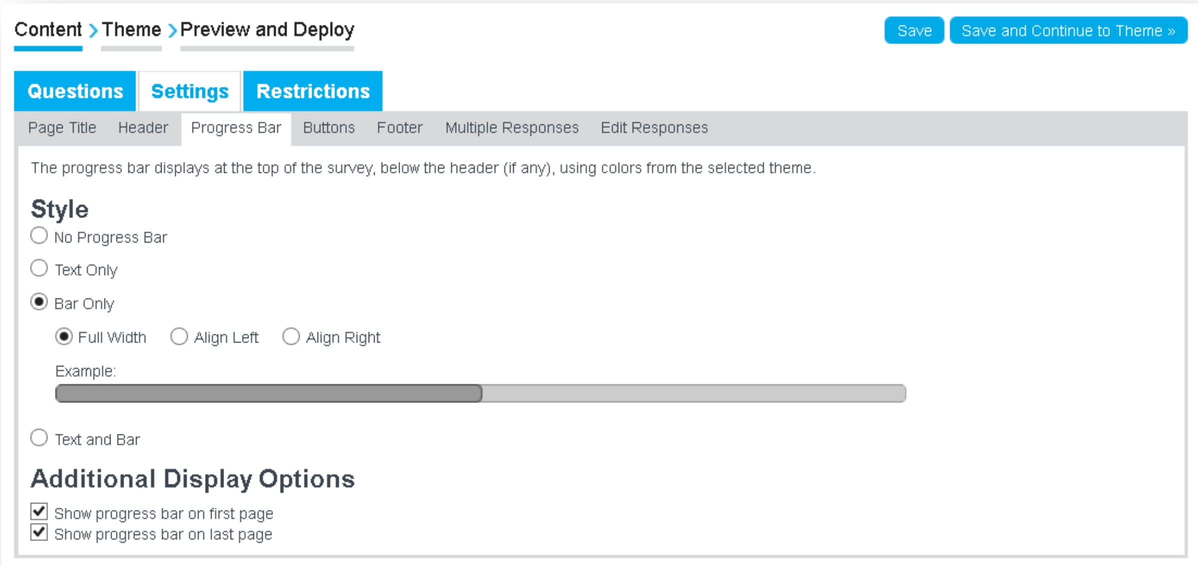


   - Under **Header** tab you can:
     - Add content that will appear at the top of every page in the survey

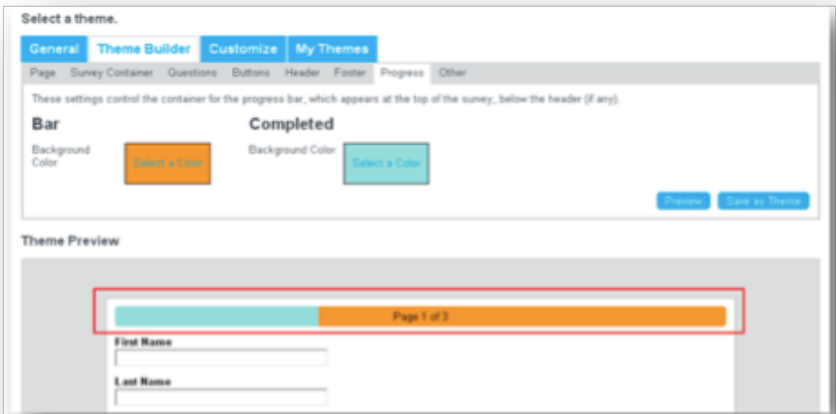


- Under **Progress Bar** you can:

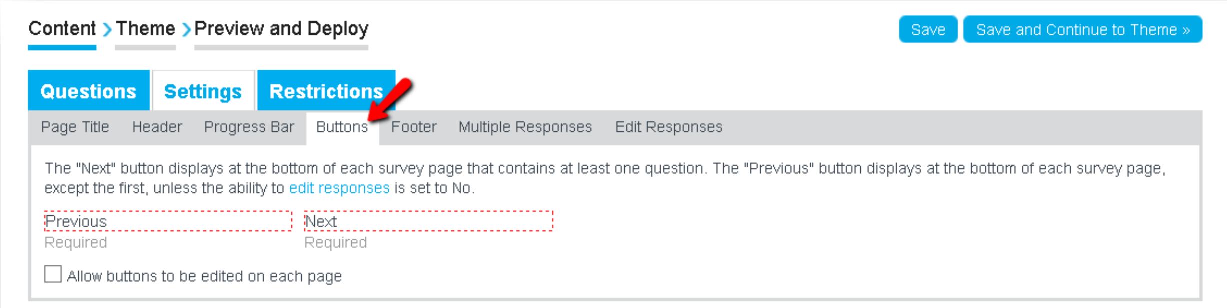
  ○ Choose to display a progress bar (below the header) that shows a recipient how much of the survey they have completed. Progress bar styles include:
    - ○ Text only e.g. page 1 of 4
    - ○ Bar only
    - ○ Text and Bar



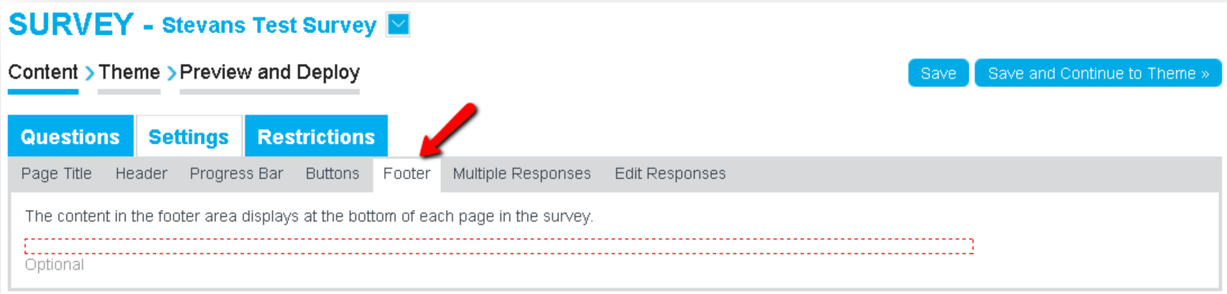
- Once added, under Theme > Theme Builder > Progress edit both the Bar and Completed colors.



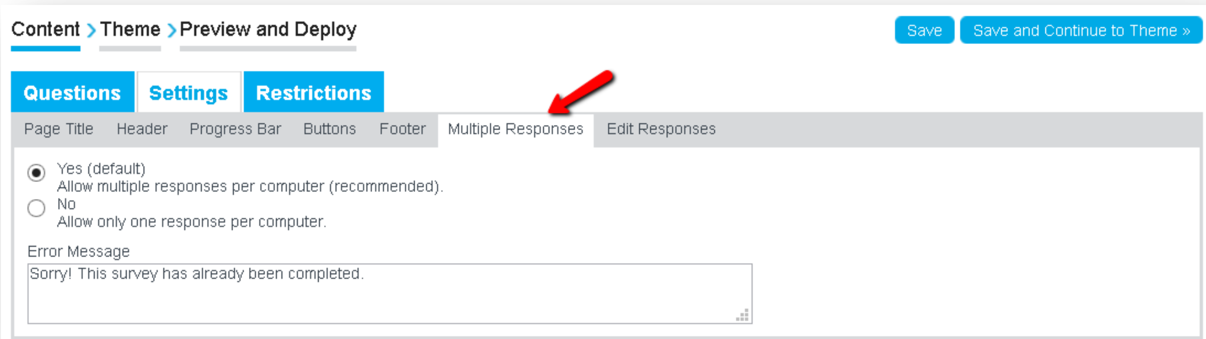
- Under the **Buttons** tab you can:
  - Change the buttons that appear on each page to navigate through the campaign



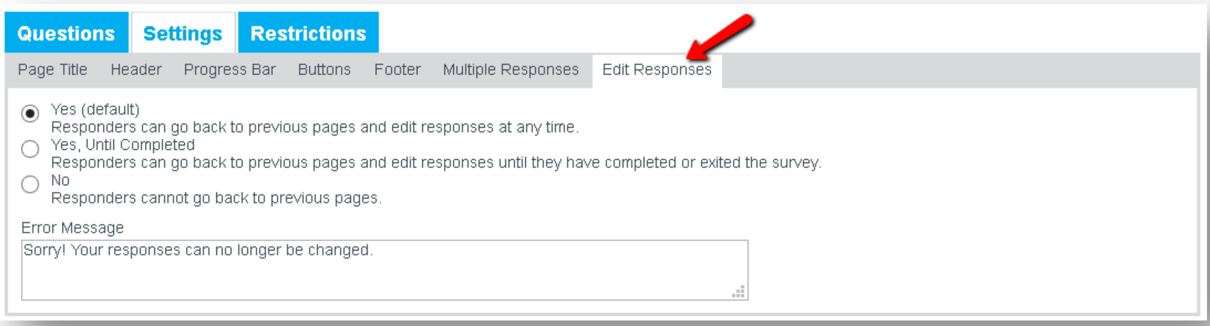
- Under the **Footer** tab you can:
  - Add content that will appear at the top of every page in the survey



- Under **Multiple Responses**, you can control whether multiple responses can be completed from the same computer:
  - No – only allows only one response per computer
  - Yes – allows multiple responses per computer (default)
  - Message to Display on Error – modify the message that would display on the page in the event multiple responses are not allowed from the same computer and a respondent attempted to answer the survey twice



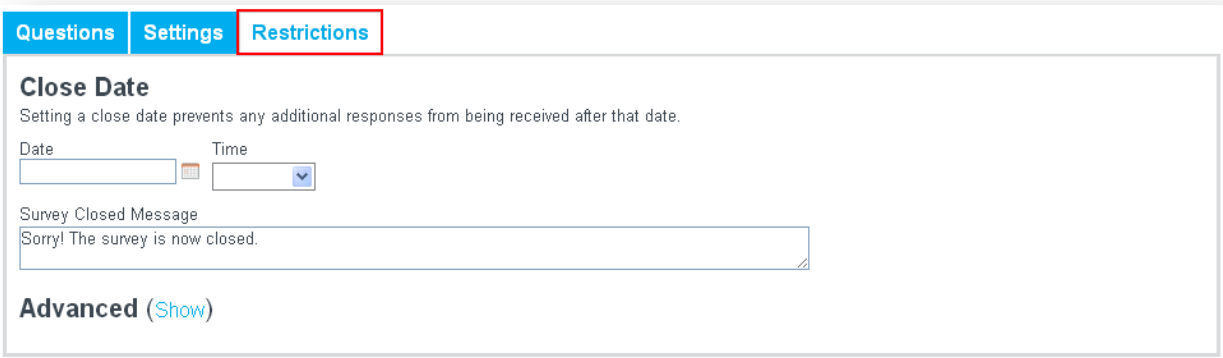
- Under **Edit Responses**, you can control whether responders can modify their answers (and also whether or not the "Previous" button will display):
  - Yes (default) – responders can modify answers and/or re-enter the survey at any time (the "Previous" button will display on all pages after the first)
  - Yes, Until Competed – responders can modify answers until they reach the final page in the survey (the "Previous" button will display on any page after the first, but not on the final page of the survey)
  - No – once a page has been completed, responders cannot modify answers (the "Previous" button will not display)
  - Message to Display on Error – modify the message that would display on the page in the event multiple responses are not allowed from the same computer and a respondent attempted to answer the survey twice



3. After you have made your desired changes, click the **Save** button.

10. SURVEY RESTRICTIONS

You can now apply restrictions such as at the Content step. For example you can set the time at which the survey should become unavailable.



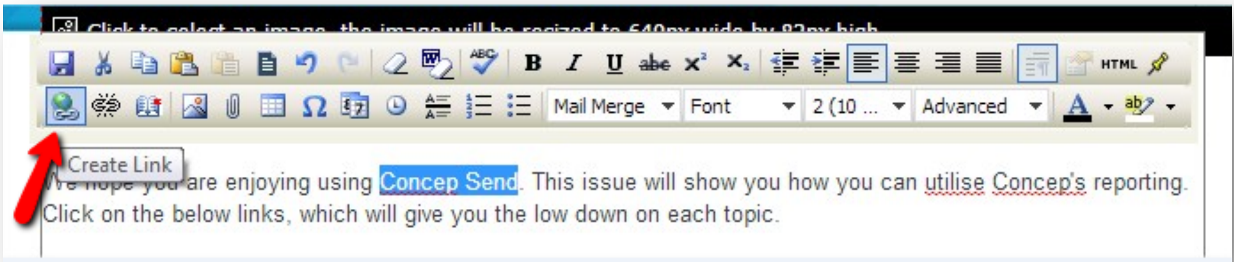
11. DEPLOY SURVEY

There are multiple options available to deploy your survey for responders to access.

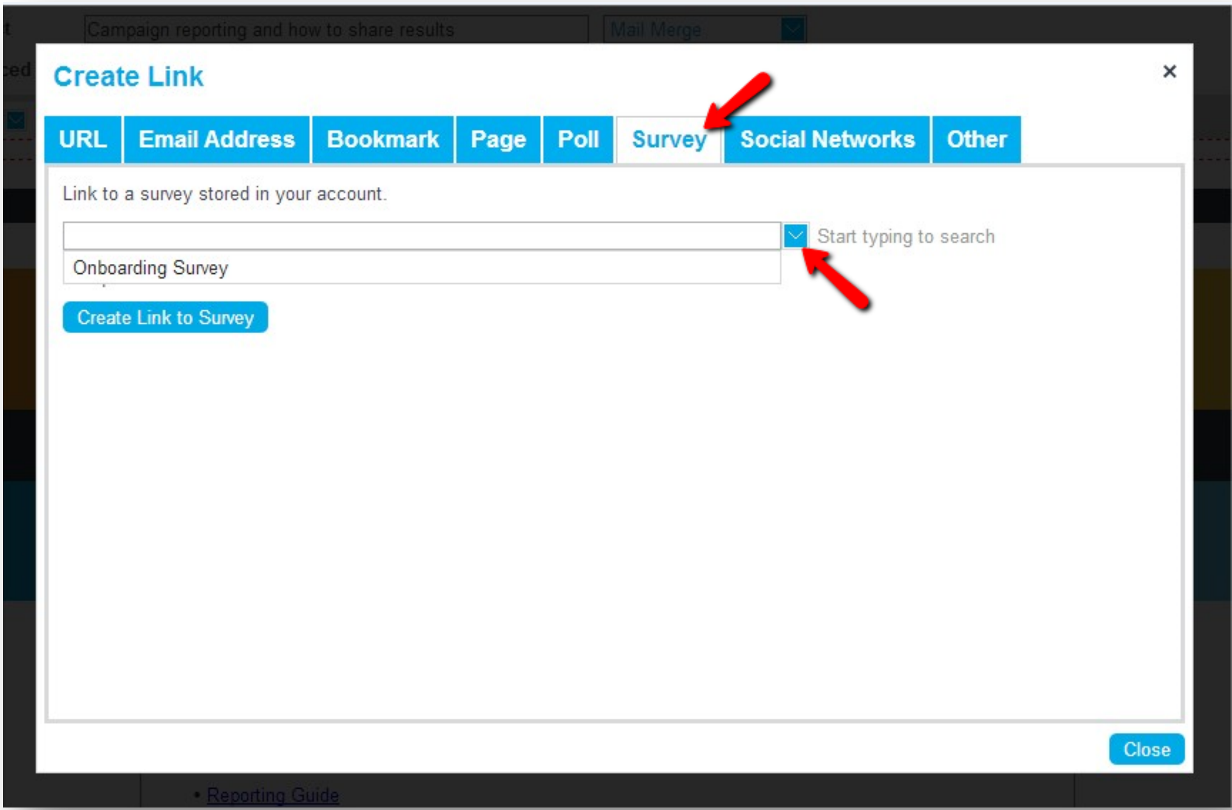
Note if you setup survey questions to auto-populate with recipient data, you must deploy the survey using the "Create Link from Campaign" method in order for the auto-population to work correctly. Note if the recipients forward the campaign, anyone they forward the survey to who clicks the survey link will also be able to view the original recipient's auto-populated data. If that person also completes the survey, their response will be recorded as a separate response.

11.1. Create Link from Campaign

1. Go to the Content step of an in progress campaign.
2. Click into the editable area, and select the text or image you wish to link. (If no text or image is selected, the title of the collector will be used as the link.)



3. Click the Create Link icon in the editing toolbar, and click the Survey tab.
4. Select a survey from the drop down menu.

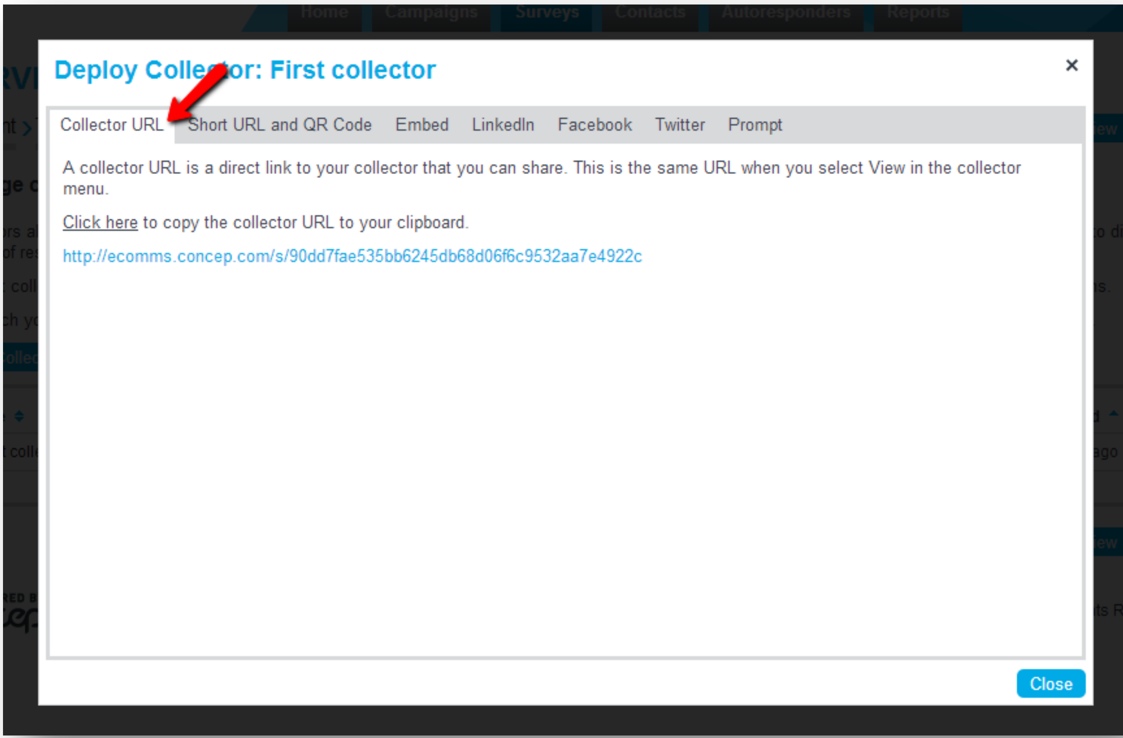


5. By default, the link will open in a new window when clicked by recipients so that they will also have your original campaign open after visiting that link. Alternatively if desired, you can deselect the checkbox to open the link in a new window.
6. Click the Create Link to Survey button.

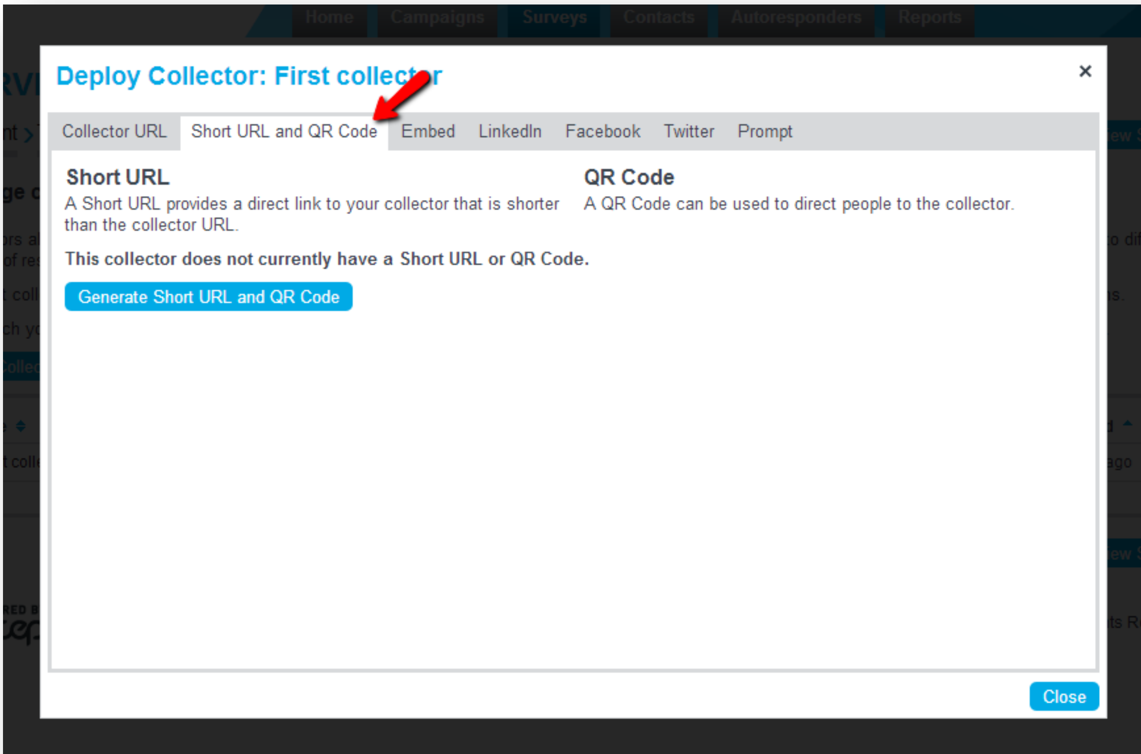
11.2. Additional Deployment Options

While in the Preview and Launch step of a survey, click the down arrow icon next to a collector's name, and select Deploy. Click a tab to access additional settings:

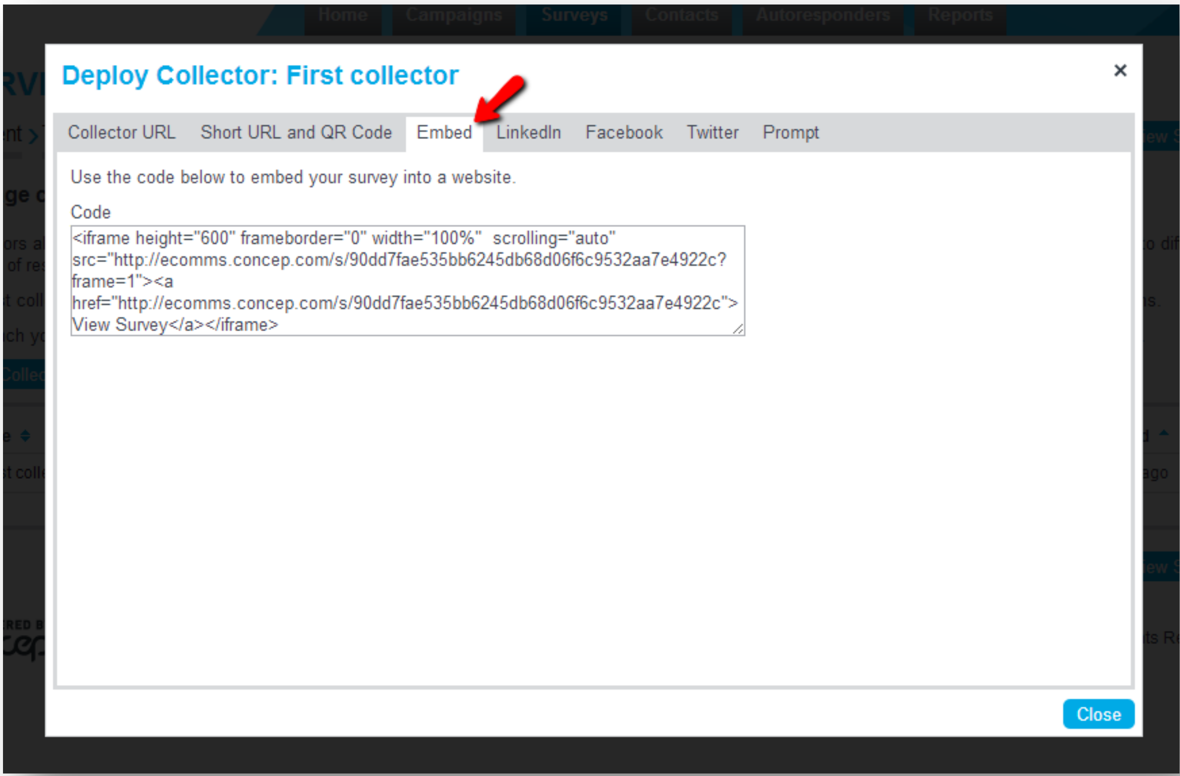
- From the **Collector URL** tab, copy and paste the URL displayed to allow responders to answer the survey (e.g. from your website).



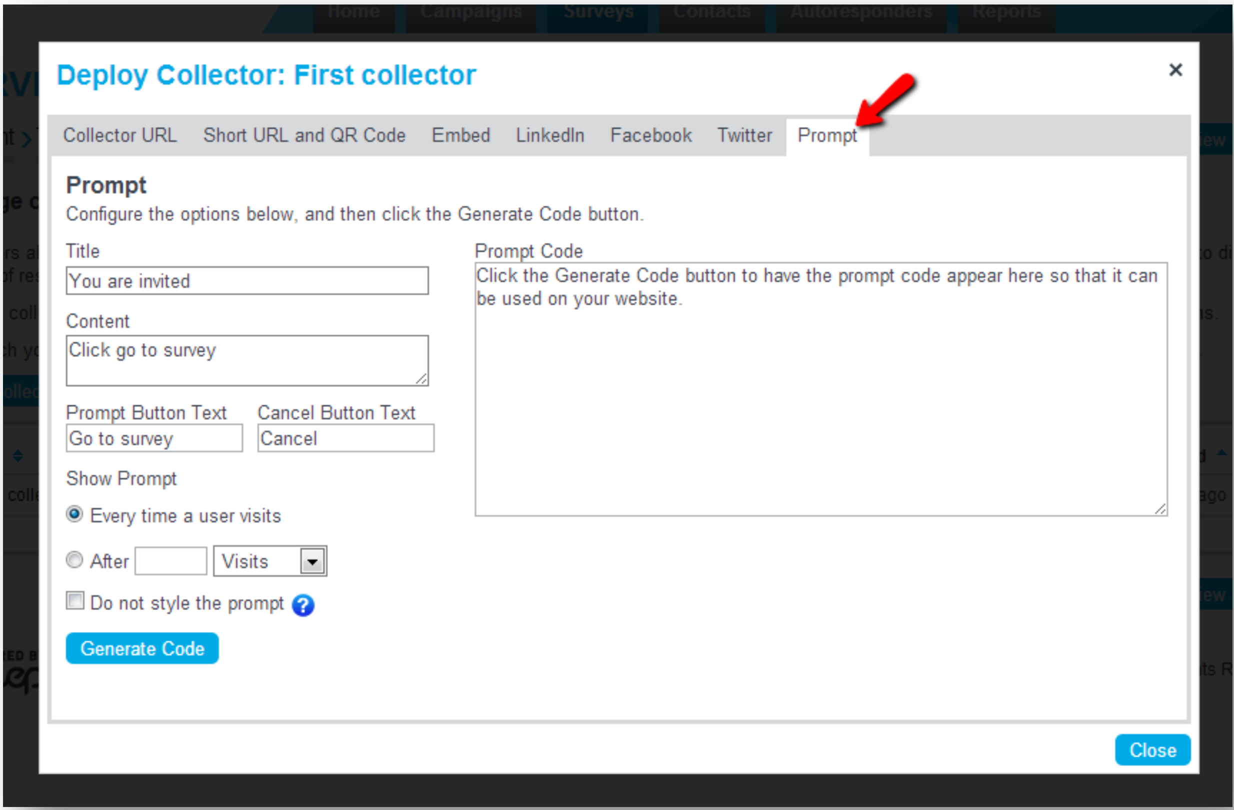
- From the **Short URL and QR Code** tab, copy and paste the Short URL or download a QR image to provide easy access to your survey.



- From the **Embed** tab, copy and paste the HTML code displayed to embed the survey within your website.



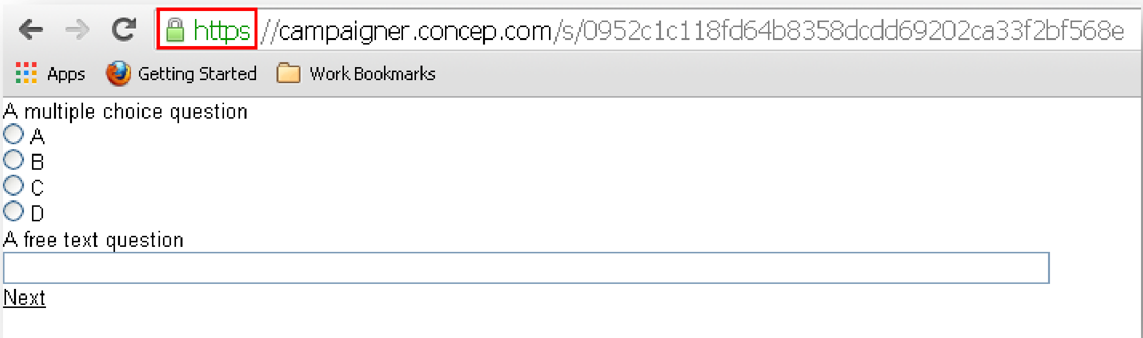
- From the **LinkedIn** tab, post a network update with a link to your survey (your account must be connected to LinkedIn via Settings for this option).
- From the **Facebook** tab, post an update with a link to your survey (your account must be connected to Facebook via Settings for this option).
- From the **Twitter** tab, tweet a short URL to your survey (your account must be connected to Twitter via Settings for this option).
- From the **Prompt** tab, generate HTML code to use on your website to automatically prompt visitors to complete your survey.



Note using one of these additional deployment methods means that when viewing the Responses tab, only IP addresses and "Unknown" will be listed for the responders (not email address). Your survey must include questions to obtain the responders' details, including name and email address. When you export responses, you will then be able to view those details.

11.3. HTTPs Redirect

We can enable deployed survey URLs to automatically redirect from **HTTP to HTTPS** (under SSL). Our surveys are not intended for the handling of highly sensitive data, however this redirect will add another security layer for data inputted into a survey.

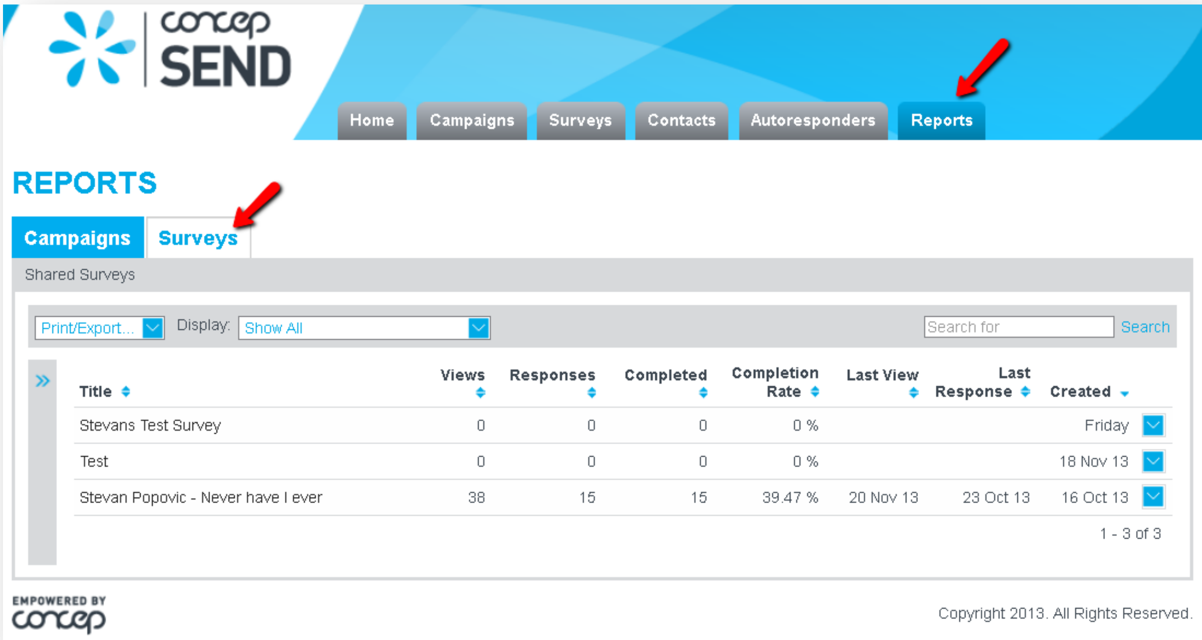


Note: HTTPS Redirect for surveys is available only to clients who are accessing Concep Send via HTTPS. Please contact your Account Manager for further details.

12. RESPONSES AND REPORTS

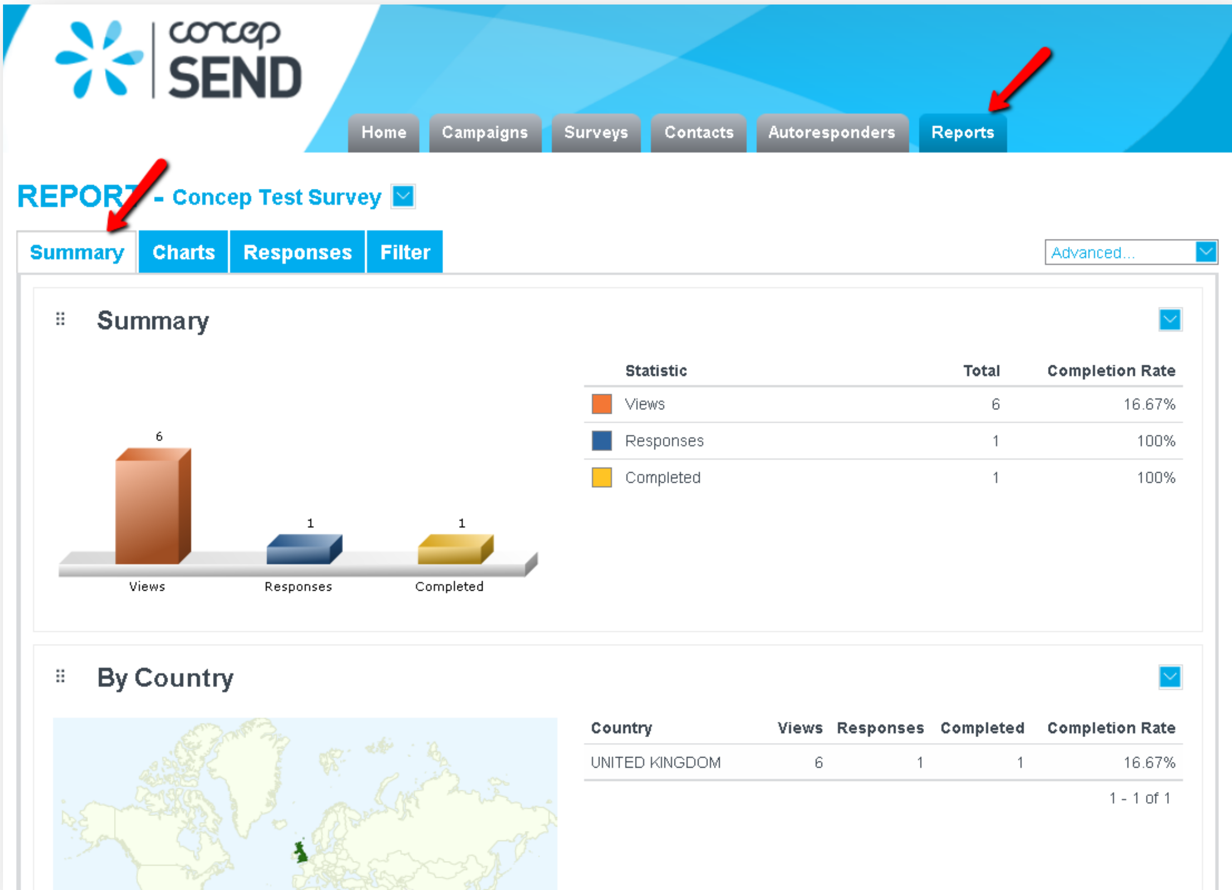
To access the reports for a survey:

1. Click **Reports** in the main navigation menu.
2. Click the **Surveys** tab.

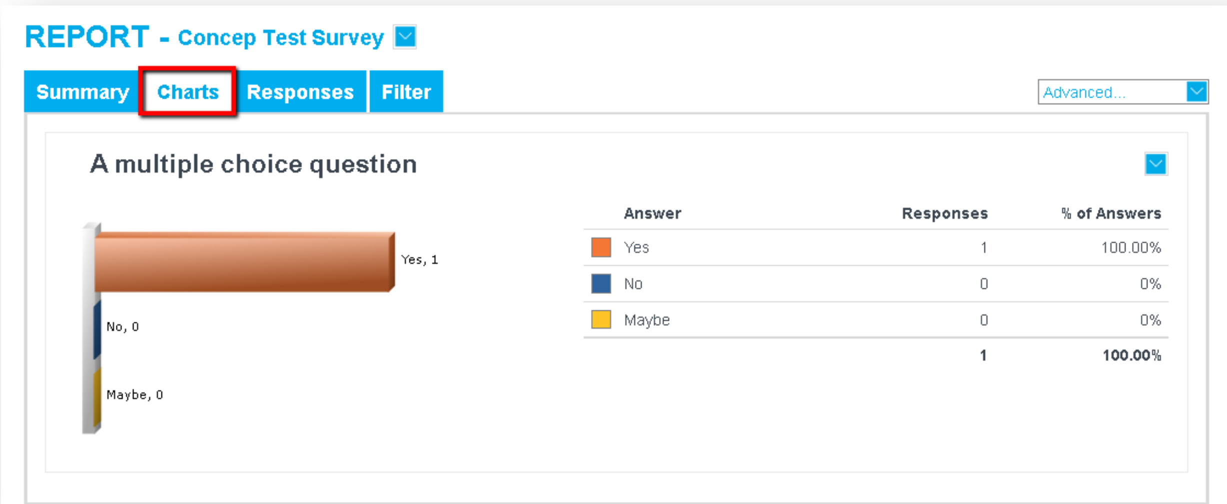


3. Click the title of a survey to access its specific details:

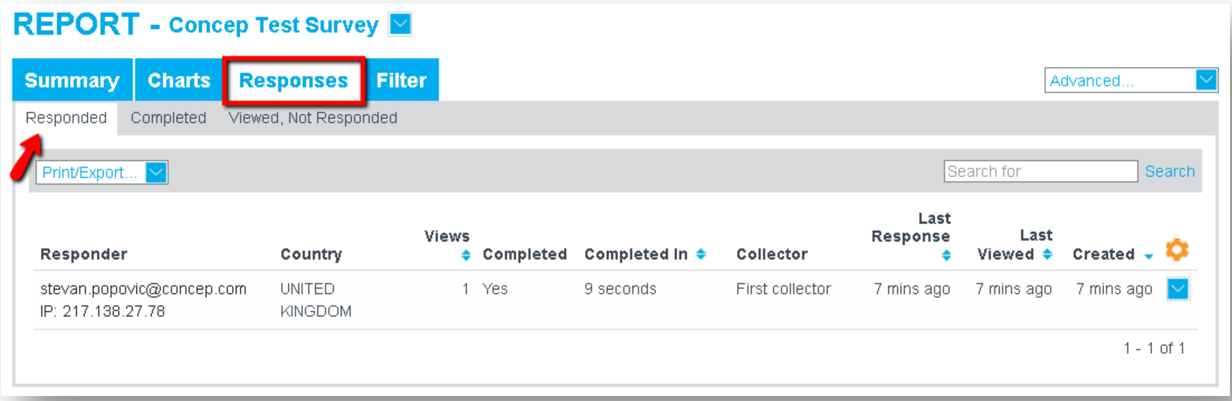
   - **Summary** - overview of the responses for the survey, including total number of views, responses (partial or completed), and completed surveys. A breakdown of responses by country is also included.



- **Charts** - a visual depiction of any multiple choice or matrix questions included in the survey. Content, free text and results question types are not displayed on the Charts tab as the answers cannot be consolidated in the same manner.



- **Responses** - all of the detailed responses for the survey. You can also click on any row in the list to view the detailed information for that particular response. Use the Print/Export drop down menu to export responses. Click the sub-navigation menu items to change which responses are displayed:
  - **Responded** (default) = list of responses where responders have completed at least one page in the survey

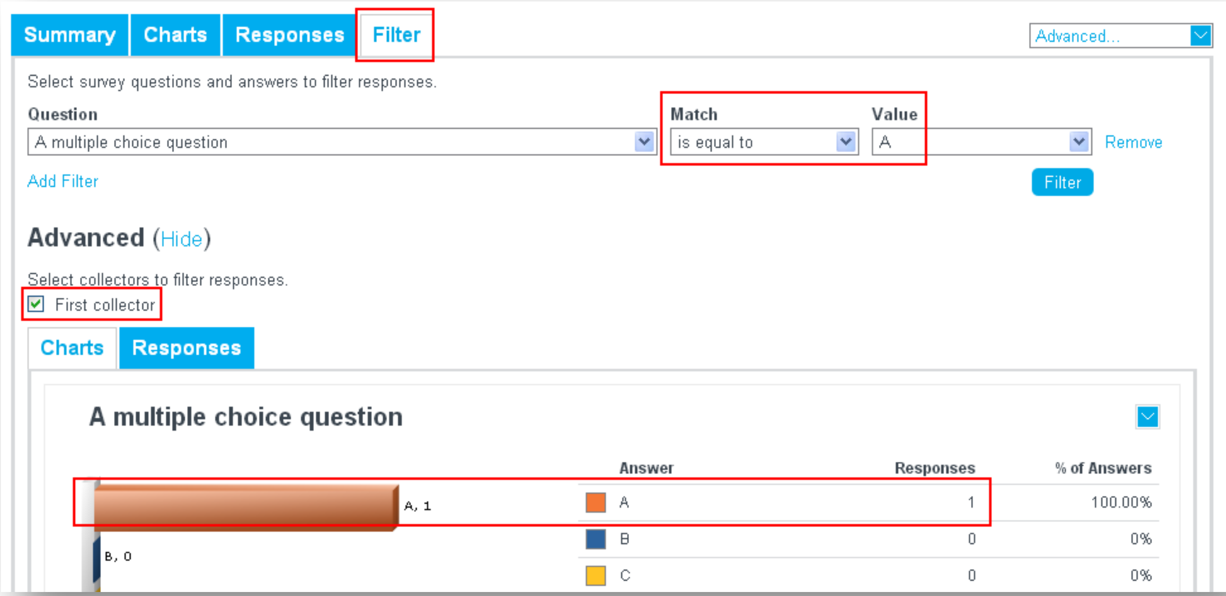


  - **Completed** = list of responses where responders have completed all pages in the survey
    Note: the list of responses in the Responded and Completed tabs will be the same for surveys with only one page of questions. They will only be different in the case of multi-page sureys where responders have answered questions on at least one page but not all, and in that case those responses will be listed on the Responded tab (not Completed).

  - **Viewed, Not Responded** = list of views where the responder did not answer any questions and only viewed the page

- **Filter**

Filter responses by question answers, based on specific collectors. In a survey report, click the Filter tab.
Enter **Question > Match > Value > click Filter** to see the filtered responses appear at the bottom of the page.



Click **Advanced > tick/untick boxes** to filter through specific collectors.

4. Click the **Print/Export** drop down menu to print or export responses.

You can also view individual user responses.

View individual responses for a survey, including all questions answered and browser used. Click **Responses tab > blue dropdown > View**.