INSTRUCTIONS MANUAL

SUR✓EYact beta

Contents

INTRODUCTION

Welcome to SurveyAct!

SurveyAct is a powerful online survey tool that allows users to easily create and send custom surveys. We offer free customer support and survey building services to ensure that every user reaches their project goals. Our objective is to provide every business or researcher with a simple way to unlock meaningful insights and make informed decisions.

FEATURES OVERVIEW

ALL SurveyAct users have access to ALL of our features.

SURVEYS

- ✓ Unlimited Surveys
- ✓ Unlimited Questions
- ✓ Unlimited Responses
- ✓ Custom Form Builder
- ✓ Multiple Page Surveys
- ✓ Multiple Response Questions
- ✓ Question Spell Check
- ✓ Custom Fonts, Colors, Logos
- ✓ 16 Gorgeous Customizable Themes
- ✓ Branded Surveys
- ✓ 19 Different Question Types
- ✓ Randomize Response Choices
- ✓ Customized Thank You Message
- ✓ Customized Survey End URL Redirect
- ✓ Advanced Page Jump Logic
- ✓ Question & Answer Piping
- ✓ Optional Survey Completion Progress Bar
- ✓ Spell check

DISTRIBUTION

- ✓ Multiple Distribution Methods
- ✓ Web Links
- ✓ Web Pop Up
- ✓ Direct Social Media Distribution
- ✓ E-mail Campaign
- ✓ E-mail Contact Groups
- ✓ E-mail Subscription Surveys
- ✓ Save Distribution Methods
- ✓ Web Links
- ✓ Survey Embedding
- ✓ Anonymous Responses
- ✓ Contact Lists
- ✓ Edit Responses

REPORTING

- ✓ Dynamic results
- ✓ Unlimited Custom Reports
- ✓ Share Reports via URL
- ✓ Multiple Parameter Filters
- ✓ Cross Tab Analysis
- ✓ Download & Export
- ✓ Save Reports

REGISTERING WITH SURVEYACT

To set up an account, click **Register** on the top of the page, or go the 'Create Account' box on the home page. Simply enter a user name, your e-mail address, and a password, followed by your name and address. Once you agree to the terms & conditions and privacy policy, click **sign up.** You will receive an e-mail asking you to verify your e-mail address; you must verify within 7 days or your account will be suspended.

Once your registration is completed, you will be able to log in anytime with the user name and password that you created.

MY ACCOUNT

CHANGE PASSWORD

To change your password, click **My Account** on the top of your screen, and then click **Change Password** from the menu on the left. Enter your current password, then enter your new password twice and click **Change Password**.

BEFORE YOU BEGIN

Before you begin building your survey, think about what your goals are. What do you hope to learn from the data you collect? Ensuring that your survey questions fit your objectives will help you design a more successful survey.

TIPS FOR CREATING A SURVEY

Surveys are a powerful and effective way to gather information. Unfortunately, not all surveys are created equal. A survey that is designed poorly can give misleading or even false results. Therefore, knowing the best way to design a survey can go a long way towards helping get the results you need.

RESEARCH PHASE

Surveys can be designed for a variety of reasons. Businesses can use surveys to measure customer satisfaction, test the viability of a new product, or to assess the performance of advertising activities. Students can use surveys to assist with research projects, and non-profits can use them to better understand the mindset of donors. No matter what you are using your survey for, make sure to start with a clearly defined objective to help you decide which questions to include. Make sure to thoroughly research your target audience as well.

Example: *I have an idea for a new online dating site. I know that there is a lot of competition, and I want to gage the interest in my plan.*

WORK BACKWARDS

Once you've defined your objectives, start thinking about the information you would like to obtain from your survey. Then, work backwards to figure out how to word the questions so that they will obtain the most accurate results. Keep your questions focused and specific. You don't want to ask questions that will collect unnecessary data.
Example: *I would like to identify the demographic that most frequently uses dating websites. Therefore I will create a survey question asking my respondents to identify their demographic information, and a separate question asking how often they visit dating websites. I will not ask vague questions like, "Do you use dating websites a lot?"*

STRUCTURE

Keep your survey as short and concise as possible. If your survey has to be long, try to make only the most relevant or important questions required. Divide the questions into pages to make the survey appear shorter to the respondent. You can also use Skip Logic to lead respondents through the most relevant path through the survey, and avoid asking questions like, "If you answered yes above…" Questions should flow in a logical order, and should not have too many response choices.

CHECK FOR BIAS

Make sure that your questions are neutral and don't lead respondents in the direction you want them to go. Avoid using statements or ambiguous questions; instead, start your questions with who, what, where, why, or how. Randomize your response choices wherever possible to make sure that survey fatigue doesn't corrupt your data. Remember to include an 'other' or 'not applicable' response when possible so respondents don't choose irrelevant answers.
Example: *I won't ask, "Do you agree that online dating is the best way to meet new people?" because that is a leading question. Instead, I will ask, "What do you feel is the best way to meet new people?"*

TEST RUN

Before you send out your survey, make sure to test it with a handful of friends or coworkers. They can help you ensure that your survey is easy to understand, doesn't contain any technical errors, and isn't longer than most people have patience for. If necessary, revise your survey to reflect the feedback from your test run. Make sure to delete your test responses before distributing your survey so they don't corrupt your final data. It is also helpful to include an open ended question at the end of your survey inviting your respondents to tell you what they thought of the survey itself; you can use this feedback for future surveys.

ANALYZE YOUR RESULTS

Make sure your sample size is large enough to achieve accurate results. When you have reached your desired number of responses, compare the data you received to the objectives you defined before creating your survey. Results to open ended questions are particularly helpful to gain valuable insights.

CREATE A SURVEY

To create a new survey:

1. Click on **+ New Survey** on the top of any page.
2. Enter a name for your survey, as well as an optional description. (The description will not be shown to respondents, but can be used to help you remember details about the survey.)
3. Choose your theme (see **THEMES AND SETTINGS**)
4. Choose your settings (see **ADVANCED SETTINGS**)
5. Click **Continue.**

COPY FROM EXISTING SURVEY

To copy an existing survey:

1. Click on **+ New Survey** on the top of any page.
2. Enter a name for your new survey, as well as an optional description.
3. In the dialog box that appears, click the radio button next to **Copy from Existing Survey.** A drop down menu will appear with your saved surveys. Choose the survey you would like to copy.
4. Choose your theme (see **THEMES AND SETTINGS**)
5. Choose your settings (see **ADVANCED SETTINGS**)
6. Click **Continue**. The survey editor will appear with the contents of the survey you chose to copy from.

SAVED SURVEYS

You can access your saved surveys anytime from the **Surveys** link in the sidebar.

THEMES AND SETTINGS

We offer a number of beautiful and professional looking themes for your survey. When you begin creating a new survey, you will be prompted to choose a theme. The theme you select will appear in preview mode and the final survey.

CREATE YOUR OWN THEME

If you have some basic design skills, you can customize any theme according to your preferences.

1. Choose any theme and click **edit**.
2. Name your new theme. To copy and edit an existing theme, choose the theme from the drop down menu.
3. The following elements of the survey theme can be changed:
    a. **Survey Font & Background**
    b. **Progress Bar**
    c. **Survey Title**
    d. **Page**
    e. **Question Heading**
    f. **Answer Choices**
    g. **Exit Link**
    h. **Require Asterisk**
    i. **Error Text**
4. To see how your changes will look, choose **Update Theme Preview**. When you are ready to apply the changes, click **Save & Close.**

Any default theme you customize will automatically be saved as a new theme.

ADVANCED SETTINGS

To access advanced settings, click **Edit Settings**, which appear to the right of your survey title in the survey editor.

Logo: To upload a logo that will be displayed to respondents on the top of your survey, click **Choose File,** select your image from the browser and click open. Ideal logo size is 300 x 100 pixels. If you want your logo to appear without a background, upload it as a PNG file type.

Progress Bar: You can choose to show respondents a progress bar that tracks their progress through the survey.

- To display the progress bar, check the box next to **Show Progress Bar**. If this box is unchecked, the progress bar will not be displayed.
- To change the color of the progress bar, click on **Choose Color** or enter in a hex code in the box.

Navigation: By default, your survey will have a Next, Finish and Exit This Survey link. To change the labels for these options, simply type in your own text over the existing text. You can also choose to hide the Exit link completely by unchecking the box next to **Show Exit Link.**

QUESTION MODES

There are two question modes that you can use while designing your survey.

1. **Q/A (Questions & Answers) Mode:** This is the default mode that will allow you view your questions with the response choices below them.
2. **Number List Mode:** This mode will remove the answer choices so you can view only the questions. This is helpful when reordering questions or merging or splitting pages, especially when you have a large number of questions in your survey.

To change modes, click the tabs on the right hand side of the survey editor.

PAGES

Pages are a great way to organize your survey into logical segments. At the end of each page, survey respondents will have to click 'Next' to proceed, at which point any errors in their responses (such as not answering a required question) will appear. Therefore, it is a good idea not to put too many questions on one page.

ADD A PAGE

When you begin building your survey, the questions you add will automatically appear on page one. To add a second page, click on the **Add Page** link that appears below each page. You will be prompted to add an optional page title and description. To continue, click **Save & Return to Survey**.

PAGE TITLE

You can add or change the title of a page by clicking on the **Edit Page** drop down menu to the right of the page number. A dialogue box will appear; add your title and an optional description, then click **Save & Return to Survey**. Page descriptions will not be displayed to respondents in your actual survey, but are useful to help you organize your survey in the design phase.

MERGE PAGES

You can merge 2 pages into 1 by clicking the **Merge Pages** link that appears between pages in your survey. A dialogue box will appear asking you to confirm that you would like to merge the pages because this action cannot be undone. To continue, click **Merge Pages.**

COPY/MOVE PAGES

You can move a page by clicking on the **Edit Page** drop down menu to the right of the page number. Select **Move**, and links will appear between each page of your survey. Locate the link that appears before the page where you want your page to be copied to, and click **Move Page Here .**

You can copy a page by clicking on the **Edit Page** drop down menu to the right of the page number. Select **Copy**, and links will appear between each page of your survey. Locate the link that appears before the page where you want your page to be moved to, and click **Copy Page Here .**

SPLIT PAGES

You can split a page into 2 pages by clicking on the **Split Page** link that appears between each question on a page in your survey. The split page dialog box will appear, where you can add an optional page title and description for the new page. When complete, click **Save & Return to Survey**.

DELETE PAGES

You can delete a page and all the questions on it by clicking on the **Delete Page** option in the **Edit Page** drop down menu. A dialogue box will appear asking to confirm that you would like to delete the page; this action cannot be undone. Click on **Delete Page** in the dialogue box to confirm. Remaining pages will automatically be renumbered.

ADD QUESTIONS

To add a question to your survey, click on the **Add Question** link that appears at the beginning of each page or before and after existing questions. A pop-up box will appear asking you to select the question type that you would like to add.

The survey questions are divided 5 categories.

1. **Multiple Choice:** Respondents to choose one or more responses form a list of options
2. **Text Fields**: Open ended questions where respondents type in their own answers
3. **Matrix Tables**: Multiple rows and columns
4. **Image Based:** Questions with responses that are based on images
5. **Special Types:** All other question types

MULTIPLE CHOICE QUESTIONS

There are two types of multiple choice questions you can add; a Radio Button, for a single response questions, or a check box, for multiple response questions.

RADIO BUTTON MULTIPLE CHOICE (ONE ANSWER)

Use this question type if you would like respondents to select a single answer from a list of predetermined responses.

To Create this Question
1. Enter the question in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. In the box labeled 'Answer Choices,' type or paste the responses (one response per line)
3. Choose your optional settings from the right hand side of the question editor.
4. To add the question to your survey, click **Save.**

Optional Settings
- The multiple choice answers can be displayed as vertical radio buttons with 1, 2, 3 or 4 columns, horizontal radio buttons, or as a drop down menu.
- Change the **Sort Type**
- **Add Comment Field**
- **Require Answer to Question**
- Add a **Subform**
- **Change Question Size & Placement**

CHECK BOX MULTIPLE CHOICE (MULTIPLE ANSWERS)

Use this question type if you would like respondents to select one or more answers from a list of predetermined responses

To Create this Question
1. Enter the question in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. In the box labeled 'Answer Choices,' type or paste the responses (one response per line)
3. Choose your optional settings from the right hand side of the question editor
4. To add the question to your survey, click **Save**.

Optional Settings
- The multiple choice answers can be displayed as vertical radio buttons with 1, 2, 3 or 4 columns, horizontal radio buttons, or a select box (CTRL+click to choose more than 1 answer).
- Change the **Sort Type**
- **Add Comment Field**
- **Require Answer to Question**
- Add a **Subform**
- **Change Question Size & Placement**

MATRIX (TABLE) QUESTIONS

Matrix questions allow you to create more complex multiple choice questions that have rows and columns.

MATRIX OF DROP DOWN MENUS

Use this question type if you would like respondents to select from multiple options with drop down menus.

To Create this Question
1. Enter the question in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. In the box labeled 'Answer Choices,' type or paste the response headings (one per line) that you would like to appear on the left side of the matrix.
3. Label the menu heading and list the responses in the 'Menu Choices' box (1 answer per line)
4. Choose your optional settings from the right hand side of the question editor
5. To add the question to your survey, click **Save**

Optional Settings
- You can choose to have up to 20 menus in your matrix. To select the number of menus, choose from the 'Select the number of menus below' drop down box.
- Change the **Sort Type**

- **Add Comment Field**
- **Require Answer to Question**
- **Change Question Size & Placement**

MATRIX OF CHOICES (ONLY 1 ANSWER PER ROW)

Use this question type if you would like respondents to select one response from each row.

To Create this Question
1. Enter the question in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. In the box labeled 'Answer Choices,' type or paste the response headings (one response per line) that you would like to appear on the left side of the matrix.
3. In the box labeled 'Column Choices,' type or paste the column headings that you would like to appear along the top of the matrix.
4. Choose your optional settings from the right hand side of the question editor
5. To add the question to your survey, click **Save**

Optional Settings
- Add an **N/A Column Heading**
- **Upload Images**
- Change the **Sort Type**
- **Add Comment Field**
- **Require Answer to Question**
- **Change Question Size & Placement**

MATRIX OF CHOICES (MULTIPLE ANSWERS)

Use this question type if you would like respondents to select one or more responses from multiple rows.

To Create this Question
1. Enter the question in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. In the box labeled 'Answer Choices,' type or paste the response headings (one response per line) that you would like to appear on the left side of the matrix.
3. In the box labeled 'Column Choices,' type or paste the column headings that you would like to appear along the top of the matrix.
4. Choose your optional settings from the right hand side of the question editor
5. To add the question to your survey, click **Save**

Optional Settings
- Add an **N/A Column Heading**
- **Upload Images**
- Change the **Sort Type**
- **Add Comment Field**
- **Require Answer to Question**
- **Change Question Size & Placement**

RATINGS SCALE MATRIX

Use this question type if you would like respondents to rate a list of items on a scale.

To Create this Question
1. Enter the question in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. In the box labeled 'Answer Choices,' type or paste the response headings (one response per line) that you would like to appear on the left side of the matrix. If you only want to have one row without a label, simply make a space in the Answer Choices box.
3. Label each column. Each column is automatically assigned a weight which is used to calculate the ratings average, but you can assign your own weights if you wish (For more about weights, see **Rating scale questions-weighting**).
4. Choose your optional settings from the right hand side of the question editor
5. To add the question to your survey, click **Save.**

Optional Settings
- You can change the number of columns that will appear on your ratings scale by choosing from the 'Column Count' drop down. You may have up to 16 columns.

- Add an **N/A Column Heading**
- Change the **Sort Type**
- **Add Comment Field**
- **Require Answer to Question**
- **Change Question Size & Placement**
- **Upload Images**

OPEN ENDED TEXT QUESTIONS

Open ended questions allow the respondent to enter their own responses instead of selecting from a list you provide.

MULTIPLE TEXT BOXES

Use this question type if you would like respondents to enter their own responses in multiple fields.

To Create this Question
1. Enter the question in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. Enter the response labels in the 'Input Box Choices' field. The number of response labels will indicate the number of text boxes.
3. Choose your optional settings from the right hand side of the question editor
4. To add the question to your survey, click **Save**

Optional Settings
- Change the **Sort Type**
- **Require Answer to Question**
- **Change Question Size & Placement**

COMMENT/ESSAY BOX

Use this question type if you would like respondents to enter their own response to a single question.

To Create this Question
1. Enter the question in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. Choose your optional settings from the right hand side of the question editor
3. To add the question to your survey, click **Save**

Optional Settings
- **Require Answer to Question**
- **Change Question Size & Placement**

NUMERICAL TEXT BOXES

Use this question type if you would like respondents to enter numerical responses to your questions.

To Create this Question
1. Enter the question in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. Enter the response labels in the 'Input Box Choices' field. The number of response labels will indicate the number of text boxes.
3. Choose your optional settings from the right hand side of the question editor
4. To add the question to your survey, click **Save**

Optional Settings
- Display an error message if non-numerical text is entered. The default text is 'Please enter a positive number,' but you can change this message by typing over the existing text.
- Check the box next to 'Require a Fixed Sum' to require that all the boxes add up to a certain number. The default sum is 100 but you can change it by typing your own number in the box. An error message will display if a respondent does not enter numbers that sum up correctly. The default error message is "The choices need to add up to 100," but you can write your own message by typing into the box.
- Change the **Sort Type**
- **Require Answer to Question**
- **Change Question Size & Placement**

CONTACT INFORMATION FORM

Use this question type if you would like respondents to enter their contact information.

To Create this Question
1. Enter the question heading in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. The 8 default fields are First Name, Last Name, E-mail address, Address, City, State, Country, and Zip. You can change the fields by typing over the existing texts. You can also make some invisible, and choose whether each field should be required or not.
3. Choose your optional settings from the right hand side of the question editor
4. To add the question to your survey, click **Save**

Optional Settings
- Show or Hide individual fields
- **Require Answer to Question**
- **Change Question Size & Placement**

IMAGE BASED QUESTIONS

IMAGE CHOICE (ONE ANSWER)

Use this question type if you would like respondents to choose a single image from a list of multiple images.

To Create this Question
1. Enter the question heading in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. In the box labeled 'Answer Choices,' type or paste the responses (one response per line).
3. Click the **Update**, and then use the boxes to upload your images. Click each box to browse for images on your computer, and then click **upload**. To clear the image, click the x in the top right corner.
4. Choose your optional settings from the right hand side of the question editor
5. To add the question to your survey, click **Save.**

Optional Settings
- The multiple choice answers can be displayed as vertical radio buttons with 1, 2, 3 or 4 columns, horizontal radio buttons, or as a drop down menu.
- Change the **Sort Type**
- **Require Answer to Question**
- Add a **Subform**
- **Change Question Size & Placement**

IMAGE CHOICE (MULTIPLE ANSWERS)

Use this question type if you would like respondents to choose one or more images from a list of multiple images.

To Create this Question
1. Enter the question heading in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. In the box labeled 'Answer Choices,' type or paste the responses (one response per line).
3. Click **Update**, and then use the boxes to upload your images. Click each box to browse for images on your computer, and then click **upload**. To clear the image, click the x in the top right corner.
4. Choose your optional settings from the right hand side of the question editor
5. To add the question to your survey, click **Save**

Optional Settings
- The multiple choice answers can be displayed as vertical radio buttons with 1, 2, 3 or 4 columns, horizontal radio buttons, or as a drop down menu.
- Change the **Sort Type**
- **Require Answer to Question**
- Add a **Subform**
- **Change Question Size & Placement**

IMAGE: MULTIPLE ANSWERS WITH BRIEF TEXT

Use this question type if you would like respondents to choose one or more images from a list of multiple images and then enter text in response to a follow-up question.

To Create this Question

1. Enter the question heading in the 'Question Text' box. To go to the next line, press shift+enter.
2. In the box labeled 'Answer Choices,' type or paste the responses (one response per line).
3. Click **Update**, and then use the boxes to upload your images. Click each box to browse for images on your computer, and then click **upload**. To clear the image, click the x in the top right corner.
4. Enter your brief text and label for the input box. (You can leave the label field empty if you like.)
5. Choose your optional settings from the right hand side of the question editor
6. To add the question to your survey, click **Save**

Optional Settings

- Change the **Sort Type**
- **Add Comment Field**
- **Require Answer to Question**
- **Change Question Size & Placement**

MULTIPLE ANSWERS WITH MULTIPLE IMAGES

Use this question type if you would like respondents to choose one or more images from a list of multiple images and then choose from sub-images based on their selection.

To Create this Question

1. Enter the question heading in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. In the box labeled 'Answer Choices,' type or paste the responses (one response per line).
3. Click **Update**, and then use the boxes to upload your images. Click each box to browse for images on your computer, and then click upload. To clear the image, click the x in the top right corner.
4. Enter your brief text and label for the input box. (You can leave the label field empty if you like.)
5. To add a pop-up menu based on the respondent's selection, list your answers in the box entitled 'Sub-Choices' and then hit **Update** again to upload corresponding images
6. Choose your optional settings from the right hand side of the question editor
7. To add the question to your survey, click **Save**

Optional Settings

- Change the **Sort Type**
- **Add Comment Field**
- Add a **Subform**
- **Require Answer to Question**
- **Change Question Size & Placement**

SPECIAL QUESTION TYPES

SECTION HEADER

Use this question type if you would like to enter text for survey respondents to read, such as an introduction.

To Create this Question

1. Enter the text heading in the 'Description' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. Choose your optional settings from the right hand side of the question editor
3. To add the question to your survey, click **Save**

Optional Settings

- **Change Question Size & Placement**

DEMOGRAPHIC FORM

Use this question type if you would like respondents to choose their demographic information from a list of predetermined options.

To Create this Question

1. Enter the question heading in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. The default demographic options are Gender, Age, Household Income, Race, Standard Education, Occupation, Employment, Marital Status, and Residence. You can change the options by typing over the existing texts. You can also make some invisible, and choose whether each field should be required or not. Standard demographic responses will automatically be included in your survey.

3. Choose your optional settings from the right hand side of the question editor
4. To add the question to your survey, click **Save**

Optional Settings
- Show or Hide individual fields
- **Require Answer to Question**
- **Change Question Size & Placement**

DATE & TIME ENTRY

Use this question type if you would like respondents to choose a specific date and/or time as their response.

To Create this Question
1. Enter the question heading in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. From the drop down menu, choose date only, time only, or both date and time. If you chose a date option, you can then choose to change the format using the drop down menu on the right.
3. In the box called 'input choices,' type or paste your labels for each line one label per line. The number of labels will indicate the number of text boxes.
4. Choose your optional settings from the right hand side of the question editor
5. To add the question to your survey, click **Save**

Optional Settings
- Change the **Sort Type**
- **Require Answer to Question**
- **Change Question Size & Placement**

IMAGE

Use this question type to upload an image for survey respondents to view.

To Create this Question
1. Enter an image description or caption in the 'description' box. To change the formatting of your question, see **Rich Text Editor**.
2. Click the 'Upload Image' box to browse for images on your computer, then click upload. To clear the image, click the x in the top right hand corner.
3. Choose your optional settings from the right hand side of the question editor
4. To add the question to your survey, click **Save**

Optional Settings
- **Change Question Size & Placement**

FORM QUESTIONS

Use this question to create a non-numbered group of questions that can stand on their own or link to multiple choice questions.

To Create this Question
1. Enter the question heading in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. Choose your form from the list of previously created forms, or click the "forms" link below to create a new form. For more on creating forms please see **HOW TO USE FORMS.**
3. Choose your optional settings from the right hand side of the question editor
4. To add the question to your survey, click **Save.**

Optional Settings
- **Change Question Size & Placement**

EMAIL SUBSCRIPTION

Use this question for respondents to sign up to be a part of a contact group that regularly receives your surveys.

To Create this Question
1. Enter the question heading in the 'Question Text' box. To go to the next line, press shift+enter. To change the formatting of your question, see **Rich Text Editor**.
2. Choose the e-mail group that you would like respondents who fill out the form to be subscribed to
3. The default field labels are e-mail address, first name, last name. The responses to these fields will be automatically saved in your e-mail groups.
4. Choose your optional settings from the right hand side of the question editor

5. To add the question to your survey, click **Save**.

Optional Settings
- **Change Question Size & Placement**
- **Require Answer to Question**

It is a good idea to include a message in the question box explaining to respondents that by providing you with their contact information, they are agreeing to receive future surveys from you.

QUESTION OPTIONS

SORT TYPE

Use the 'Sort Type' drop down menu to decide how you want your response choices to be sorted.

Sort Type-NONE
No Sort Type is the default sort option, and will leave your response choices in the order you entered them into your survey

Sort Type- ALPHABETICAL
This option will automatically display your response choices in alphabetical order

Sort Type-RANDOMIZE
This option will randomize your response choices so that each respondent will see them in a different order. This protects your survey data from the effects of survey fatigue and location bias.

ADD COMMENT FIELD

Check the box next to 'Add Comment Field' to create an input text box at the bottom of your list of answers. (The input box will remain at the bottom even if you chose a Sort Type.) The default label for the comment field is 'other (please specify)', but you can change this by simply typing over the existing text.

REQUIRE ANSWER TO QUESTION

Check the box next to 'Require Answer to Question' to force respondents to select an option before continuing on in the survey. You can also choose to display an error message if the respondent tries to proceed without answering the question. The default error message is set to "This question requires an answer," but you can change it by typing over it or deleting it to show no message.

DISPLAY FORMAT

This setting changes the way that multiple choice/image choice question answer choices are displayed to the respondent. You can choose from the following formats:

- Vertical buttons, with one, two, three, or 4 columns
- Horizontal buttons
- Drop Down (for a single response question) or select box (for a multiple response question)

SUBFORM

You can choose to add a Subform to single and multiple response multiple choice questions that will pop-up after the respondent selects an answer. Simply select a previously created form to add. For more on creating forms, please see **FORMS**.

CHANGE QUESTION SIZE & PLACEMENT

You can change how each individual question looks in your survey.

Question Placement: allows you to choose whether you would like the question to start on its own line or appear next to the previous question.

Question Width: changes how much of the page your question will cover. Choose a higher percentage or fixed pixel amount to cover a larger space, or a lower amount to use less space.

Question Margin: adds more white space around and between questions.

N/A COLUMN HEADING

Adds a "not applicable" option for matrix questions. The default column heading is 'N/A,' but you can change it by simply typing over

the text. The N/A column will remain the last column to the right of the table even if you apply a sort option.

UPLOAD IMAGES

Some question types will allow you to upload images that will appear next to your survey questions. Click **Update**, and then use the boxes to upload your images. Click each box to browse for images on your computer, and then click upload. To clear the image, click the **X** in the top right corner.

RICH TEXT EDITOR

With the Rich Text Editor, you can easily add styling to your text; insert pictures and links into your survey, paste from Microsoft Word, and more. To access these options, click **Rich Text Editor** at the top right of any question editor.

Please Note: Some changes made in the Rich Text Editor may not be displayed in the survey editor, but will appear in preview mode and in the final survey.

Font Options
- Bold, Underline, Italicize, Strike-through, Subscript, Superscript
- Change the font to Arial, Arial Black, Comic Sans MS, Courier New, Narrow, Garamond, Georgia, Impact, Sans Serif, Serif, Tahoma, Trebuchet MS, Verdana
- Change the Font Size (1-7)
- Add header styles
- Color/Highlight

Paragraph Options
- Bullet Points/Numbering
- Indent/Outdent
- Change Alignment

Other Options
- Horizontal Rule
- Insert Image from URL- all images inserted using the text editor need to be hosted online. You can use a free site such as photobucket.com to host your images. To insert, click the 'Insert Image' button, then enter the image url in the pop-up. Once inserted, you can change the alignment using the paragraph alignment buttons.
- Insert Hyperlink- Highlight the text you want to link to an external site. Click on the 'Insert Hyperlink' button and enter the link into the pop-up box. It is helpful to add instructions to survey respondents to CTRL+Click the hyperlink so they are not navigated away from the survey.
- Cut, Copy, Paste, Paste Text
- Print
- Show Source
- Spell Check- Spell check is automatically applied in the text editor

ⓘ **TIP:** There is no text editor for answer choices, but you can copy and paste html code directly into the answer choice boxes to change the formatting of your responses. To obtain the html code, make the formatting changes in the question text editor, and then click on the 'Show Source' button. This will bring up the html code- cut and paste it into the answer choices box to apply. You can also use HTML to add an image to a response, if desired.

EDITING QUESTIONS

EDIT QUESTION

To edit individual questions in your survey, click **Question Editor** in the **Edit Question** drop-down menu to the right of the question title. The question editor will pop up. If you wish to change the format of the question text, use the Rich Text Editor. (see **Rich Text Editor**). You can now edit the question or response choices text, change the display format, or make changes to any of the question-specific options (such as adding a Subform, inserting an image, etc) that are available. Be aware of making changes to a survey that has already collected responses, as you may damage the integrity of the data by editing the question (see **EDITING A SURVEY WITH RESPONSES** for more information).

HIDE/UNHIDE A QUESTION

If you do not want a question to appear in your survey, but you do not want to delete it, you can choose to hide it. To hide a question, simply click **Hide Question** in the **Edit Question** drop down to the right of the question title. The question will still appear in your survey editor, with the word 'HIDDEN' next to the question title. This means that the question will NOT appear in your survey.

To show the question, click **Unhide**.

DELETE QUESTION

To permanently delete a question from your survey, click on **Delete Question** in the **Edit Question** drop down menu to the right of the question title. Deleted questions cannot be restored.

MOVE QUESTION

To move a question to a different location in your survey, click on **Move Question** in the **Edit Question** drop down menu to the right of the question title. 'Move Question Here' links will appear after each question in your survey. Navigate to the question you want to precede the question that is being moved, and then click **Move Question Here**. Question numbers will automatically reorder if you change the position of a question. If you click 'Move Question' and then change your mind, you can click 'Cancel Move' next to any question.

COPY QUESTION

To copy a question, click **Copy Question** in the **Edit Question** drop down menu to the right of the question title. 'Copy Question Here' links will appear after each question in your survey. Navigate to the question you want to precede the question that is being copied, and then click 'Copy Question Here.' Question numbers will automatically reorder if you change the position of a question. If you click 'Copy Question' and then change your mind, you can click 'Cancel Copy' next to any question. Once you go ahead with the copy, you cannot undo the change.

CHANGING THE QUESTION TYPE

You can change the question type once the question has been added to your survey. You can only change types within a category. For example, you can change a radio button multiple choice question into a check box multiple choice question, but not into a matrix or an open text field.

To change the question type:
1. Click the question type above the question title, or choose **Question Editor** in the **Edit Question** drop down to bring up the editor.
2. In the Question dialog box, click on the drop down arrow next to the current question type. This will bring up a list of question types within the category.
3. Choose the question type from the list that you would like to switch to.
4. Click **Save.**

WHAT IS PIPING?

Piping automatically inserts responses to previous survey questions into the question or answer choices of a question on a subsequent page. Piping can help increase your survey response rate by keeping the respondent engaged and eliminating the need for extraneous answer choices.

Click here to see piping in action.

QUESTION PIPING

Question piping is the ability to insert a response to a previous question in a survey into the question text of a question on a following page.

The source question can be one of the following single response question types:

- Multiple Choice Radio Button
- Image Choice (1 Answer)

The target question can be any question type.

HOW TO PIPE A RESPONSE INTO A SURVEY QUESTION

To pipe the response to a previous question into the question on a following page:

1. Create the source question, which can be a Radio Button or an Image Choice (single response). Enter your question text and response choices and click **Save** to add the question to your survey.
2. Create the target question on a page that follows the page with the source question. The target question can be any question type.
3. In the question editor, type your question text. Leave your cursor where you want the piped response to go.
4. Below the question text box, choose your source question from the drop down box labeled Insert field from prior question/response, then click on the + sign to add the piped field to your question. The field will be inserted wherever your cursor is but you can move it anywhere you like by cutting and pasting the code.

5. When a respondent takes your survey, their response to the source question will automatically be inserted into the target question text.

Please note: Responses to an Other/Comment field will not be piped, so you may not want to use that option in a source question.

You can add more than one piped response into your question text by simply repeating the steps above.

ANSWER CHOICE PIPING

Answer Choice Piping is the ability to use the responses selected by a user as the answer choices in a question on a following page.

The source question can be one of the following multiple response question types:

- Check Box (Multiple Choice)
- Image Choice (Multiple Answers)

The target question can be one of the following question types:

- Radio Button (Multiple Choice)
- Check Box (Multiple Choice)
- Image Choice (Multiple Answers)
- Matrix of Drop Down Menus
- Matrix of Choices (Single Answer)
- Matrix of Choices (Multiple Answers)
- Ratings Scale Matrix

HOW TO PIPE RESPONSES INTO ANSWER CHOICES

To pipe the responses selected by a user as the response choices in a question on a following page:

1. Create the source question, which can be a Check Box question or a Image Choice (Multiple Answers) question.
2. Enter your question text and response choices and click **Save** to add the question to your survey.
3. Create the target question on a page that follows the page with the source question. The target question can one of the following question types: Radio Button (Multiple Choice), Check Box (Multiple Choice), Image Choice (Multiple Answers), Matrix of Drop Down Menus, Matrix of Choices (Single Answer), or Matrix of Choices (Multiple Answers)
4. Ratings Scale MatrixCheck the box labeled 'Use responses to prior question?' Choose the source question from the drop down box.
5. When a respondent takes your survey, their responses to the source question will automatically be inserted into the answer choices of the target question. If your target question is a Matrix of Choices, the responses will be piped into the rows of the table.

Please note: Responses to an Other/Comment field will not be piped, so you may not want to use that option in a source question.

FORMS

HOW TO USE FORMS

Simplify your survey by creating custom forms that stand on their own or link to multiple choice survey questions. This can be helpful if you would like to collect data that corresponds to a question. You build you forms separately and then tie them to survey question, so you can create standard templates that you can reuse for future surveys. You can also use forms on their own, if you would like to create a non-numbered form such as a mailing list, registration form or sweepstakes entry.

Please Note: While you will be able to view and sort the responses to your form questions, you will not be able to filter your reports by form question responses.

The default form size is 500 x 400, but you can change the size by entering a new number in the width or height box or by dragging the bottom or sides. Empty space on the form template will show up on your survey as white space, so it's a good idea to resize it before you add it to your survey. Check the box labeled **Automatically Adjust Box to Fit** and the white space will be removed automatically.

You decide on the alignment when you drag and drop the individual questions to your form. To left align the form with the rest of your survey questions, make sure to drag the elements all the way to the left of the form creator box.

FORM ELEMENTS

There are five different form elements that you can add to your form:

- **Text Line:** Creates a line of text that you can use as a question title or description..
- **Input Box:** Creates an open ended text box for survey respondents to input their own responses.
- **Check Boxes:** Creates a series of check boxes for respondents to select multiple (one or more) responses.
- **Radio Buttons:** Creates a series of radio buttons for respondents to select a single response
- **Combo Box:** Creates a drop down menu for respondents to select a single response. The advantage of using this element rather than a Radio Button is that it displays a long list of choices in a shorter, easier to read format.

HOW TO CREATE A FORM

1. From the sidebar, choose **Forms**, then **New Form**.
2. Give your form a name that will be easy for you to remember, so you can link it to questions or re-use it in future surveys.
3. You can change the form size by entering a new number in the width or height box or by dragging the bottom or sides.
4. Drag and drop one of the 5 form elements to your form. Make sure to align the element exactly where you want it to appear. Click **Edit** to customize your form element.
   a. **Text Line**- Enter your text.
   b. **Input Box**- Enter a name (optional- will not be displayed to respondents), and the size of the input box
   c. **Check Box**- Enter a name (optional), a label, and the response choices
   d. **Radio Button** - Enter a name (optional), a label, and the response choices
   e. **Combo Box**- Enter a name (optional), a label, and the response choices. You can check the response next to Hide First Option and the first response choice will not appear until the drop down arrow is clicked.
5. When you are finished editing an element, click **Done** to apply changes. Continue adding elements as desired.
6. When you are finished creating your form, you can preview it by clicking on the magnifying glass icon at the top right.
7. Click **Save and Continue**.

ⓘTIP: You can use the Form tool do add an 'other' or 'comment' response to questions that don't have that option included, such as image choice questions or a demographic form.

HOW TO USE A FORM IN YOUR SURVEY

There are two possible ways to link forms to your surveys.

1. **As a Form Question:** Inserting your form into a Form Question type will display your form as a question in the survey.

2. **As a Subform:** You use a form as a subform for single and multiple response multiple choice questions. The subform will only appear once the user selects a response to the question. This can be useful if you want to collect secondary data that corresponds to a specific response.

HOW TO USE A FORM IN A FORM QUESTION

1. In the survey editor, click **Add Question**.
2. Choose **Form Question** from the Special Question Type category.
3. Enter the question heading in the 'Question Text' box.
4. Choose your form from the list of previously created forms, or click the "forms" link below to create a new form. For more on creating forms please see HOW TO CREATE A FORM:
5. To add the question to your survey, click **Save**.

HOW TO USE A FORM AS A SUBFORM

1. In the survey editor, click **Add Question.**
2. Add a question with subform* capabilities.
3. Enter the question heading in the 'Question Text' box.
4. Enter your response choices.
5. On the right hand side, choose your form from the Subform drop down menu, or click the "forms" link below to create a new form.
6. To add the question to your survey, click **Save**.

*The following questions have subform capabilities:
- Multiple Choice-Radio Button
- Multiple Choice-Checkbox
- Image Choice (Single Responses)
- Image Choice (Multiple Responses)

FORMS & SUBFORMS REPORTING

Depending on whether you use your form as a form question or a subform, your reports will look a little different. Form question responses will appear in your reports the same way any other question would. Subforms will appear as 'comments' below the question they are linked to, and the combined results can be viewed by clicking on the View link that appears next to the question.

FORMS MANAGER

Saved forms are stored in your Forms Manager. In the Forms Manager, you can sort saved forms by title or date created, preview or delete each form, or click the form title to edit.

PREVIEW YOUR FORM

To preview your form, click the preview link to the far right of the form title in the Forms Manager.

DELETE A FORM

To delete a form, navigate to the delete link to the far right of the form name in your Forms Manager. When you click **Delete**, a confirm delete box will pop up and ask, "This form will be permanently deleted and cannot be recovered. Are you sure?" Click **Delete Form** to continue.

PAGE JUMPING

Page Jumping allows you to direct respondents to different places in the survey based on their responses. You can choose to send respondents to specific pages in the survey, to the end of the survey, or to an external URL.

ⓘTIP: You can only jump forward in your survey, as jumping backwards will prevent respondents from completing the survey. Before you apply Page Jump rules, make sure to finalize the order of your questions and pages.

HOW TO ADD PAGE JUMPS TO YOUR SURVEY

1. In Q/A Mode, click the **+Page Jump** button that appears at the bottom right corner of every page in your survey
2. Create an IF rule by choosing the question from the current or previous pages. Depending on the question type, a few sub-options may appear For example, a matrix question will require to choose a row and a column as part of your IF statement. You can also choose 'Page is Viewed' which will apply the rules to any respondent who views the page, regardless of their responses.
3. Choose the condition.
   - **Is Answered:** The question was answered.
   - **Is Not Answered:** The question was not answered.
   - **Includes:** The response (s) you select are chosen, regardless of any other responses chosen in the same question.
   - **Does Not Include:** The response (s) you select are NOT chosen, regardless of any other responses chosen in the same question.
   - **Is Equal To:** The response(s) you select match the responses chosen exactly.
   - **Is Not Equal To:** The response(s) you select do NOT exactly match the responses chosen
   - **Greater Then:** The response is greater then (For Date and Time or Numerical Questions)
   - **Less Then:** The response is greater then (For Date and Time or Numerical Questions
     The conditions available will vary depending on the question type:
4. Choose the responses. For matrix/table questions, you will need to select the row/column first. Some conditions or questions will not have response choices, for example the 'Is Answered' condition, or an Image or Section Header question.
5. Create a 'THEN' rule to determine the path the respondent should take if their answers match the conditions you select.
   JUMP TO: Moves the respondent to the page that you select and skips all the pages in between.
   END SURVEY: Jumps the respondent to the end of the survey.
   END SURVEY & GO TO URL: Ends the survey and redirects the respondent to an external URL.

The rules will only apply when the user hits Next at the end of the page. If the respondent selects a response that activates Page Jumping, the survey will automatically renumber.

ADVANCED PAGE JUMP RULES

If you want your IF statement to include multiple conditions, you can add another condition by clicking the **+ Advanced Page Jump Rules** link that appears below your first condition. You can then **Add Conditions** to your initial statement, or **Add A New Rules Group**. By default, 'AND' will connect your conditions, meaning that all the conditions you select must apply for the logic to pass. However, you select 'OR' from the drop down menu, and if any of the conditions you selected apply, the logic will pass. You can also combine 'AND' and 'OR' conditions. When building complex rules, make sure that your rules don't contradict each other.

A complete IF/THEN statement is called a rules group. You can add multiple groups of rules to one page, but keep in mind that if a respondent's answers match conditions set in more than one rule group, the first group would take precedence.

REORDER PAGE JUMP RULES

To reorder rules, simply grab the number in front of the rule and drag and drop it where you would like it to go.

HOW TO REMOVE PAGE JUMP RULES

In Q/A Mode, click the **+Page Jump** button that appears at the bottom right corner of every page in your survey. Click the Orange – (Minus) sign button to delete individual rules. To clear all rules on the page, click **Clear All Rules**.

USE PAGE JUMPING TO QUALIFY RESPONDENTS

You can use page jumps to qualify respondents for your survey. For example, if you only want females to take your survey, your first question should ask if the respondent is male or female. Create a rule that applies to the 'male' response, which automatically direct them to the end of the survey. If you want to add a message to explain to respondents why they do not qualify, you can add a page right before the end of the survey and add a descriptive text question, and jump respondents who don't qualify to that page. There, you can insert your message, such as, "Sorry, you do not fit our criteria for this survey." When respondents click yes, they will be taken to the end of your survey. Make sure to add a page jump to the last question so that respondents who are completing the rest of the survey don't see this page.

When viewing your report, you can easily filter out the male respondents by creating a female only filter (see **HOW TO ADD A FILTER**).

TIPS FOR USING PAGE JUMPS

- If you are creating a survey that is complex or will require a lot of different rules, it is best to plan out your survey on paper first. Decide if you will need to use simple or advanced logic so you will know how to organize your questions most efficiently.
- Make sure that your survey is organized and final before applying logic, because if you reorder questions after logic is applied you may disable it.
- If you want to add a special message to respondents who are skipped to the end of the survey, you can add a page right before the end of the survey and add a descriptive text question, and choose 'Jump to' instead of 'End Survey.' There, you can insert your message, such as, "Sorry, you do not fit our criteria for this survey." When respondents click yes, they will be taken to the end of your survey. Make sure to add skip logic to the last question so that respondents who are completing the rest of the survey don't see this page.

EDITING YOUR SURVEY

HOW TO EDIT A SURVEY

To edit a survey, click the survey title on the list in your surveys dashboard. This will take you to the survey editor. From here, you can delete, change or add pages, questions, answer choices, and more.

To edit the name, theme, or settings of a survey, click on **Edit Settings** to the right of the survey title in the editor.

EDITING A SURVEY WITH RESPONSES

Once you have sent a survey out and begun collecting responses, you must be aware that editing your survey can affect your results.

The following changes can be made without affecting your results:

- Changing the order of questions (Moving questions around on the page, or between pages)
- Changing the wording of questions
- Adding new questions.

These modifications should not be made once responses have been collected, as they will affect the integrity of the data:

- Deleting questions: Once you delete a question, all of the responses that have been collected for that question will be permanently removed from the results
- Re-arranging response choices in a question: If you change the order of choices in a question, the responses will no longer correctly match up, resulting in data integrity issues. Responses are stored based on the location of the choice, not the name of the choice.

PREVIEW SURVEY

As you create your survey, you can see how it will look to the respondent at any time by clicking on the magnifying glass icon located on the top right of your survey editor. On the preview screen, you will be able to test the functionality of all your questions.

PLEASE NOTE: Survey data entered in preview mode will NOT be saved.
You can also preview an individual survey in the survey dashboard, by clicking on **Preview** in the **Actions** drop down menu.

OPENING/CLOSING A SURVEY

When a survey is open, it is collecting responses. When you are finished collecting response, you can close your survey to make sure no further information is entered into your final results. To close a survey, navigate to the survey dashboard and click **Open** to change your survey status to closed.

ADDING SURVEY INCENTIVES

In order to encourage people to take your survey, you can offer incentives or rewards. There are a number of different incentives or rewards you can offer.

Coupon: You can add a printable coupon for discounts, free items, or other offers.
- Step 1: Make sure your coupon is saved as JPEG anywhere on your computer.
- Step 2: Add a page to the end of the survey, and then add an Image question to the page.
- Step 3: Upload your coupon in the question editor. In the question text box, you can add a brief explanation (like hit CTRL+P to print) or terms.

Raffle: Enter respondents in a raffle to win a prize
- Step 1: Add a Contact Information question as the last question in your survey.
- Step 2: Instruct respondents in the question text that to be entered into the raffle, they must provide some contact information such as an email address or phone number.
- Step 3: Once your survey is closed, you can download the answers to the question in an excel format and choose a random winner.

If you want to collect contact information while still keeping the survey responses anonymous, you can create a second survey that only includes a Contact Information question.   Create a Web Link for the new survey (see **Web Link**). Return to your original survey, and add a **SECTION HEADER** question to the last page. Insert your link, along with any instructions you want to provide. Make sure to inform users that their contact info will not be connected to their responses. You will be able to download the responses to your survey as well as the contact information, without there being any link between the two.

DISTRIBUTE

Once you have created and tested your survey, it is time to send it out to potential respondents. There are four different methods for sending out your survey;

- **Web Link** - creates a link you can use to send your survey in an email message or post online.

- **E-mail Campaign**- sends a message with a link to your survey to groups of contacts that you create.

- **Embed**- creates a code that you can copy and paste to create a pop-up window on your website.

- **Social Media**- automatically publishes a link to your survey on your Facebook or Twitter accounts.

Any responses collected through these methods are automatically stored in your account.

To create a new distribution method, click on the **Envelope** icon at the top right of the survey editor, or click on Distribute in the sidebar. If this is the first distribution method you are creating for this survey, you will be taken directly to the **New Method** page. If you have previously created distribution methods for this survey, you will be taken to the **Saved Distribution Methods** page. Click +Add Distribution in the top right corner.

Saved distribution methods can be accessed in the survey sidebar.

Web Link

A web link creates a link you can use to send your survey in an email message or post online. You can create two different kinds of links; a standard URL that can be pasted into an email (starts with a http://) , or an html code to post on a web page that creates a link to take the survey (starts with <a href="http://). By default, the link will say 'Click Here to take Survey,' but you can type over the text in the link to change it.

Example:

NEW EMAIL LINK

Just copy and past this link in your invitation email. The link should be visable to potential respondents in order to maximize results.

http://surveyact.studylogic.rustybrick.net/s/qRYOzLMfPUlJbDou

This link will be saved in the 'Saved Distribution Links'.

done

To create a Web Link:

1. On the **New Distribution** page, choose the survey that you would like to distribute.
2. Choose Web Link from the buttons on the left, and name your link so you can refer back to it later.
3. Choose whether you want to create a link for an email or a link for a web page.
4. Choose your DISTRIBUTION SETTINGS.
5. Click Next. A pop up box will appear with the code for you to copy and paste.

E-MAIL CAMPAIGN

An E-mail Campaign sends a message with a link to your survey to groups of contacts that you create.

To create an E-mail Campaign:

1. On the **New Distribution** page, choose the survey that you would like to distribute.
2. Choose E-mail Campaign as your distribution method, and name the campaign so you can refer back to it later. Choose an existing group of contacts (see Contact Groups) to send your survey to, or create a or click the radio button next to 'I would like to create a new group of contacts' to create a new one. If you choose this option, you will be prompted to enter contacts before sending your campagin.
3. Choose your DISTRIBUTION SETTINGS.
4. Click Next. A pop up box will appear where you can create your campaign.
5. Enter the subject line, the 'From' e-mail address*, and a brief message. You can use the default message and survey link, or write your own message and press the 'Click Here to Insert Survey Link' button on the left side to include a unique link to the survey for each recipient. Make sure the Unsubscribe Link is included in your message, as well as your physical address so your message is not marked as spam.
6. Click Save for Later to save your campaign and send at a later time, or Save & Send to send the campaign immediately.

*Please note: In compliance with CAN SPAM laws, if you are using a different 'from' e-mail address than the one you used to sign up for SurveyAct, you will be required to verify the new address before you can send your campaign.

If you want to send yourself a test version before you launch the full e-mail campagin, simply create a contact group that contains only your e-mail address, and send an e-mail to that group.

EMBED

Creates a code that you can copy and paste to create a pop-up window on your website.

To create an Embed code:

1. On the **New Distribution** page, choose the survey that you would like to distribute.
2. Choose **Embed** from the buttons on the left, and name this method so you can refer back to it later.
3. Choose your **DISTRIBUTION SETTINGS**
4. Click **Next**. A pop up box will appear with a code that you can copy and paste into your website.

SOCIAL MEDIA

Automatically publishes a link to your survey on your Facebook or Twitter accounts.

HOW TO CREATE A LINK FOR FACEBOOK

1. On the **New Distribution** page, choose the survey that you would like to distribute.
2. Choose **Social Media** from the buttons on the left, and name this method so you can refer back to it later.
3. Select the radio button next to the Facebook icon.
4. Choose your **DISTRIBUTION SETTINGS**
5. Click **Next**. In a few seconds, a new window will appear with the link to your survey and an option to add a personal message (your pop-up blocker must be disabled). If you are not logged in to your Facebook account, you will have to sign in before you can continue.
6. Click 'Share Link' to publish your message.

HOW TO CREATE A LINK FOR TWITTER

1. Click on the Envelope icon at the top right of the survey editor, or click on **Distribute** in the sidebar.
2. In the Distribute box, click on **+New Method** at the top right hand corner.
3. Choose **Social Media** from the buttons on the left, and name this method so you can refer back to it later.
4. Select the radio button next to the Twitter icon.
5. Choose your **DISTRIBUTION SETTINGS**
6. Click **Save & Continue**. In a few seconds, a new window will appear with the link to your survey and an option to add a personal message (your pop-up blocker must be disabled). If you are not logged in to your Twitter account, you will have to sign in before you can continue.
7. Click 'Tweet' to publish your message.

DISTRIBUTION SETTINGS

When creating a new distribution link, you have the option to change certain settings.

Prevent Multiple Unique Responses: By default, multiple responses to your survey can be collected on one computer. If you would like to allow only one responses per computer, click the ON/OFF slider to change the setting to ON. This prevents the same respondent from taking your survey multiple times.

Permit Response Editing: By default, survey respondents are allowed to go back and change their answers once they have clicked Next to submit them. If you would like to prohibit editing, click the ON/OFF slider to change the setting to OFF.

Collect IP Addresses: By default, the survey will record the IP address of respondents and store the data with the responses to your questions. If you would like the survey to be anonymous, click the ON/OFF slider to change the setting to OFF and the IP address will not be recorded.

Display Thank You Message: By default, you can enter a thank you message that will be displayed to respondents after they complete the survey. To disable this option, click the ON/OFF slider to change the setting to OFF or simply leave the field blank.

Redirect at Survey Completion: By default, once respondents complete your survey they will be redirected to the SurveyAct home page. You can enter your own URL instead, or choose not to redirect them anywhere at all by clicking the ON/OFF slider to change the setting to OFF.

Settings for New Web Link (Web Link)

Name: New Web Link

OFF Prevent Multiple Unique Responses
When enabled, only permits one response per computer

ON Permit Response Editing
When enabled, respondents can go back and edit responses after submitting a page

ON Collect IP Addresses
When enabled, respondent IP addresses will be recorded

ON Display Thank You Message
When enabled, your message will be displayed to respondents when they complete the survey

Thank you for completing this survey!

ON Redirect at Survey Completion
When enabled, respondents will be directed to the URL you provide

Cancel   save & continue

You can change the settings of a distribution method on the Saved Distribution Methods page by clicking on the **Actions** drop down menu and then clicking on **Settings**.

OPENING/CLOSING A DISTRIBUTION METHOD

When a survey is open, it is collecting responses. When you are finished collecting response, you can close your survey to make sure no further information is entered into your final results. To close a survey, navigate to the survey dashboard and click **Open** to change your survey status. You can also to choose to close only on specific distribution method. Click **Distribute** on the sidebar, then click on the **Open** link next to the name of the method you want to close.

TEST

Before you send you survey, we recommend that you test it by sending out to a few friends or colleagues. This will help you determine if your survey is user-friendly and works as you planned it. (See **DISTRIBUTE** for more info on sending out your survey). This information will be saved, so you can view how individual responses are saved and reported.

However, it is important that you clear the test data before you officially launch your survey to make sure that you do not taint your results. To clear the test data, click **Distribute** on the sidebar, then click on the **Actions** drop down menu next to the distribution method you used to collect responses. Choose **Clear Responses.**

AUTO-TEST

Auto Test allows you to automatically populate your survey with responses. This will help you see how your data will be viewed in reports, and if there are any problems with the questions you designed. To auto-test your survey, you have to create a distribution method. Click on the **Actions** drop down menu next to the distribution method you created, and choose **Auto Test**. Enter the number of dummy responses you would like to be entered in the survey.

To clear the test data, click **Distribute** on the sidebar, then click on the **Actions** drop down menu next to the distribution method you used to collect responses. Choose **Clear Responses**.

CONTACT GROUPS

CREATE A CONTACT GROUP

Contact Groups are lists of names and email addresses that you can use to send your surveys to via an E-mail campaign, on a one time or consistent basis.

You can create a new Contact Group directly from the Distribution box, or by clicking on **Contact Groups** on the sidebar and then clicking **+ New Group**.

To manually add e-mail addresses to your list, click on **Add** at the top right corner of the New Contact Group page. A pop-up box will appear where you can either type or copy and paste the information. The format should be as follows: Email Address, First Name, Last Name, Custom 1, Custom 2. Click Save & Continue and the contacts will be automatically added to your list.

ADD NAMES TO AN EMAIL GROUP VIA SURVEY

You can use the Email Subscription question type to subscribe survey respondents to a Contact Group.

1. Create a new survey.
2. Add desired survey questions.
3. Add an Email Subscription question as the last question before the end of the survey.
4. Respondents who fill out their name and E-mail address will automatically by subscribed to the group you selected.

You can choose to only offer certain respondents the option to subscribe to your e-mail group by applying Page Jumps before the page with the E-mail Subscription question.

1. Create a new survey.
2. Add desired survey questions.
3. Add the question that will determine whether or not the respondent should be shown the E-mail Subscription option.
4. Add an Email Subscription question as the last question before the end of the survey.
5. Add Page Jump rules that direct only those respondents who selected a specific response to the page with the E-mail Subscription question. All others should be jumped to the end of the survey.

Example: Subscribe all Males to your E-mails

Q1: Please select your Gender

- Male
- Female

PAGE JUMP: IF P1Q1 IS EQUAL TO MALE, JUMP TO PAGE 2. IF P1Q1 IS EQUAL TO FEMALE, END SURVEY.

(See **HOW TO ADD PAGE JUMPS TO YOUR SURVEY**.)

ANTI-SPAM RULES

We do not tolerate spam and reserve the rate to close the account of any user who does not comply with our rules.
- All e-mail recipients must have consented to or opted to receive your emails
- All e-mail messages must include an unsubscribe link; you may not attempt to send someone a message once they have unsubscribed from your emails.
- Your message must include a physical address.
- Make sure that your e-mail messages do not appear to be spam.
- Do not use false or misleading subject lines
- Always use a valid reply to e-mail address and reply to messages promptly
- Your e-mails must comply with the **CAN SPAM Act**.

EXPORT CONTACTS

You can export your contacts into a CSV file by clicking **Export** at the top right corner of the New E-contact Group page. Select the fields that you want to be exported from the check box list, and then click on **Download**.

DELETE CONTACTS

To delete an entire contact list, click on the **Actions** drop down menu to the right of the contact group and click on **Delete List**.

To delete contacts, click on **Delete** at the top right corner of the New Contact Group page. You can delete all the contacts in the group, delete contacts that match a specific domain name, or contacts that match the email address you enter. Make your selection and then click **Delete**. You can also delete individual contacts by clicking on the **X** in the email group list.

UNSUBSCRIBED CONTACTS

All e-mail campaigns must be sent out with an unsubscribe link in the message. When users unsubscribe from your list, their name will appear with a line through it to indicate that they are not an active user. Unsubscribed users will not be counted in the number of contacts in the group.

	E-MAIL ADDRESS	LAST NAME	FIRST NAME	CUSTOM 1	CUSTOM 2	DELETE
☐	Dsmith@gmail.com	Smith	David	New York	NY	X
☐	MonicM@yahoo.com	White	Monica	Boston	MA	X
☐	SBlack@Lidico.net	Black	Samuel	Chicago	IL	X
☐	~~Tara@surveyact.com~~	Smith	Tara	Cedarhurst	NY	X

Any e-mail campaign you send out to this list will not be sent to them, and you will not be able to add that contact back onto your list.

You can view the results of your survey by clicking on the number of responses located in the dashboard, or by clicking the Report icon at the top right and then clicking **Survey Results** in the sidebar.

On the Survey Results page, each response is listed by the date and time that the survey was started and completed. Also listed is the distribution method that the respondent used, the respondent's IP address (optional), the URL link of the survey that the respondent clicked on, and the number of questions in the survey the respondent completed.

To view individual results, click on the 'date started' link. Each question will be listed with the responses below it.

SURVEY RESULTS
Sample Survey- All Questions (edit survey)

From: _____ To: _____ None ▼ 🔍

STARTED	COMPLETED	DISTRIBUTION METHOD	IP ADDRESS	QUESTIONS	DELETE
01/07/13 10:13	01/07/13 10:14	New Web Link (Web Link)	192.168.1.8	20/22	X
01/07/13 13:50	01/07/13 13:50	New Web Link (Web Link)	127.0.0.1	17/22	X
01/07/13 13:50	01/07/13 13:50	New Web Link (Web Link)	127.0.0.1	17/22	X
01/07/13 13:50	01/07/13 13:50	New Web Link (Web Link)	127.0.0.1	17/22	X
01/07/13 13:50	01/07/13 13:50	New Web Link (Web Link)	127.0.0.1	17/22	X
01/07/13 13:50	01/07/13 13:50	New Web Link (Web Link)	127.0.0.1	17/22	X
01/07/13 13:50	01/07/13 13:50	New Web Link (Web Link)	127.0.0.1	17/22	X
01/07/13 13:50	01/07/13 13:50	New Web Link (Web Link)	127.0.0.1	17/22	X
01/07/13 13:50	01/07/13 13:50	New Web Link (Web Link)	127.0.0.1	17/22	X
01/07/13 13:50	01/07/13 13:50	New Web Link (Web Link)	127.0.0.1	17/22	X

FILTERING RESPONSES

You can view only responses that were submitted in a specific date range by entering the dates in the search field and clicking **Filter**. You can also filter your responses by responses or properties. First, create your filter (see **FILTER**). Then choose the filter from the drop down menu and click the search icon.

EDITING INDIVIDUAL RESPONSES

You can edit individual responses by clicking on the underlined question title. A dialog box will pop up and allow you to select a different answer choice or type a different response into the comment box. Once you click save, the response will automatically be updated.

DELETING RESPONSES

You can delete an individual response by clicking the delete **X** at the end of the row on the results page.
To clear all responses, click **Distribute** on the sidebar, then click on the **Actions** drop down menu next to the distribution method you used to collect responses. Choose **Clear Responses**.

EXPORTING RESPONSES

See **EXPORTING DATA**.

REPORT

SurveyAct allows you to create and export powerful reports based on the responses to your surveys.

VIEW THE DEFAULT REPORT

SurveyAct will automatically create a default report for every survey. The default report contains all of your survey questions with the response totals and percentages calculated.

To view the default report:

1. Click the Reports icon on the top right of your screen, or click **Reports** in the sidebar.
2. The Default Report will be listed underneath your survey. Click on it to view the report.

Once in your default report, you can modify it by adding filters (see **HOW TO ADD A FILTER**) or viewing it with **CROSS TAB ANALYSIS**.

(P1-Q2) Which of the following breeds of dogs do you own? Check all that apply.

		(Count)	(Percent)
Golden Retriever		5	25.00%
Pomeranian		12	60.00%
Basset Hound		9	45.00%
Beagle		9	45.00%
Poodle		8	40.00%
Great Dane		9	45.00%
Greyhound		8	40.00%
Border Collie		**13**	**65.00%**
Shih Tzu		5	25.00%
Yorkshire Terrier		5	25.00%
Maltese		11	55.00%
Other (please specify)		4	20.00%

Total Answered Question:20   Total Skipped Question:0

CREATE A NEW REPORT

1. Click the Reports icon on the top right of your screen, or click **Reports** in the sidebar.
2. Locate the survey that you want to report on, and click **New Report**. (If you click on the reporting icon while in a specific survey, only that survey will be displayed. To view another survey, click the reporting icon on the top right of your screen).
3. In the dialog box that appears, give your report a name that will help you refer back to it.
4. Add optional filters (see **FILTER**). If you do not apply any filters, the default report will be displayed, but you can add filters to a report at any time.
5. If desired, check the box labeled 'Cross Tab Mode' to apply Cross Tabs to your report. (see **CROSS TAB ANALYSIS**).
6. Click **Save & View**.

UNDERSTANDING YOUR REPORTS

In the Report viewer, response counts are displayed graphically as bar graphs, along with the total sum and percentages of responses for each answer choice. Also calculated in your report is the total number of respondents who answered and skipped each question.

OPEN ENDED RESPONSES

To view the individual responses to open ended text questions or multiple choice questions with an 'other/comment' field, simply click on the response field label and the responses will appear.

The total value to the responses to a numerical question will be added and will appear next to the sum of responses.

MATRIX (TABLE) QUESTIONS

The individual responses to each column of your table will be displayed separately in your report.

RATING SCALE QUESTIONS-WEIGHTING

Ratings scale question will have an additional field for average rating. When you create this question, the default weights that correspond to each column start at 1 and go up 1 for each response (ie,1, 2, 3...). You can change these values to any whole numbers (negative or positive) even after you have distributed your survey and are collecting responses. If you use a N/A column, it will automatically be weighted at 0.

Example: We've created a question with five rankings, with default weights.

After 85 responses, the report would look like this:

(P1-Q1) Please rate our store in the following areas:

	Excellent [1]	Good [2]	Average [3]	Fair [4]	Poor [5]	N/A	Average	Rating Count
Customer Service	14.12% (12)	16.47% (14)	14.12% (12)	20.00% (17)	16.47% (14)	18.82% (16)	2.52	85
Cleanliness	11.76% (10)	18.82% (16)	16.47% (14)	14.12% (12)	21.18% (18)	17.65% (15)	2.61	85
Prices	17.65% (15)	14.12% (12)	21.18% (18)	17.65% (15)	14.12% (12)	15.29% (13)	2.51	85
Product Availability	16.47% (14)	18.82% (16)	15.29% (13)	16.47% (14)	16.47% (14)	16.47% (14)	2.48	85

Total Answered Question:85   Total Skipped Question:0

In the screenshot above, the numbers in the header columns (ie, Excellent-1) are the weights. The number next to the percentages in each is the number of people who selected that response. In order to get the average rating, we multiply the percentage of people who selected the response by the weight and add them all together.

For example, to calculate the average rating for cleanliess, we would use the following formula:
(14.12%*1)+(16.47%*2)+(14.12%*3)+(20.00%*4)+(16.47%*5)=2.52

An average rating of 2.52 falls right between Good and Average.

REFRESH REPORTS

Reports are dynamic, and will automatically be updated with new responses as they come in. To view an updated report, click **Refresh** at the top right corner of the report viewer.

FILTER

You can filter your reports based on criteria that you determine. Filters help you look for patterns, view responses only from a specific group of individuals, or narrow your results down to only the most applicable responses. You can filter results by responses or by properties.

HOW TO ADD A FILTER

1. While in a report viewer, click **Add/Edit Filter** and click on **+ New Filter**.
2. The Edit Filter box will appear. Name your filter.
3. Select whether you would like a **New Response Filter** or a **New Property filter**.
4. Choose the options for your filters.
5. When you have finished adding filters, click **Save** to return to report. You can select and deselect the filters in the report viewer at any time.

RESPONSE FILTERS

Response Filters filter reports by responses to a specific question or set of questions.

When you select New Response Filter, the drop down menu that appears will have all your survey questions listed in numerical order. Choose the question that contains the responses that you would like to use to filter your data.

Multiple or single response questions and image questions: A drop down menu will appear that contains all the possible responses to your question. Choose the response that you would like to use as your filter. You also have the option to choose 'Any Answer Choice," which will filter the data to display only the data from respondents who answered any response to that question.

Matrix Questions or Multiple Answers with Multiple Images: You can filter questions that have rows and columns or multiple layers of response choices. Choose the row response and the column response from the drop down menu, or choose 'Any Answer Choice' to view the response data from any respondent who answered the question.

Comment/Essay Questions: You can filter an open ended question by a specific word or phrase. Enter the text you would like to match and then select if you would like the filter to match all the words, any of the words, the exact phrase, or any text that contains the phrase. If you want to view the data from any respondents who answered the question, leave the 'With Text' field blank and choose 'Any Words' from the "Compare Method' drop down menu.

Open-Ended Contact Info, Demographic Form, or E-mail Subscription: You can filter by a specific response to any of the fields. First, choose 'Any Answer Choice' or one specific response field. Then, select if you would like the filter to match all the words, any

of the words, the exact phrase, or any text that contains the phrase. If you want to view only the data from any respondents who answered any part of the question, choose 'Any Answer Choice,' leave the text field blank, and choose 'Any Words' from the 'Compare Method' drop down menu. If you would like to view only the data from any respondent who gave any response to a specific part of the question, choose that field from the 'Line' drop down menu, leave the text field blank, and choose 'Any Words' from the 'Compare Method' drop down menu.

Numerical Text Boxes: You can filter a Numerical text box question by a specific numerical response to any of the fields. First, choose 'Any Answer Choice' or one specific response field. Then, enter a number and select if you would like the filter to match all the words, any of the words, the exact phrase, or any text that contains the phrase. If you want to view only the data from any respondents who answered any part of the question, choose 'Any Answer Choice,' leave the text field blank, and choose 'Any Words' from the 'Compare Method' drop down menu. If you would like to view only the data from any respondent who gave any response to a specific part of the question, choose that field from the 'Line' drop down menu, leave the text field blank, and choose 'Any Words' from the 'Compare Method' drop down menu.

Descriptive Text or Image: You can filter your data to show only the responses of respondents who viewed an image or text by selecting the 'Viewed' check box in the response filter options.
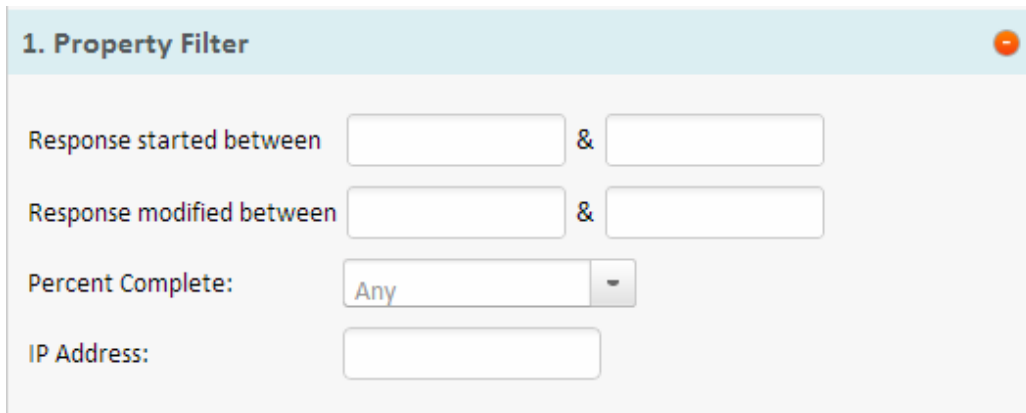
Date & Time: You can filter your data to only show the responses before, after, or equal to a specific date and time.

ⓘ TIP: You cannot filter your data by responses to form questions. You can, however, export the raw report data to excel and sort the responses there.

PROPERTY FILTERS

Property Filters sort your data by specific survey properties.

- Responses started during a specific date range
- Responses modified during a specific date range
- Survey status- surveys that were at least 20%, 50%, 75% or 100% Completed
- Responses from a specific IP Address

MULTIPLE PARAMETER FILTERS

Sometimes you may want a single filter to include more than one response or property filter, or to include both a response and a property filter. You can easily add a 2nd filter parameter within the same filter by clicking on the **New Response Filter** or **New Property Filter** within the edit filter box. Once you have created two or more filters, select if you would like the responses to match either parameter ('or') or both parameters ('and'), or create a custom combination of filters by pasting the answers and adding AND, OR, or NOT commands.

EXAMPLE: I want to see respondents who answered in #1 that they are "Female" and do not own a "Car" in #2:

Logic Code: [ANSWER1] - [ANSWER2]

You can also use the custom combination of filters to exclude respondents that chose a specific response from the filter:

EXAMPLE: I want to see respondents who answered that they are "Female" in #1 and that own a "Car" in #2 or "House" in #3 or a "Motorcycle" in #4:

Logic Code: ([ANSWER1] + [ANSWER2])=([ANSWER3] = [ANSWER4])

Please Note: You cannot apply two response filters for a single question with a single response and combine them with 'AND'- the results will always be 0.

COMBINING FILTERS VS. ADDING MULTIPLE INDIVIDUAL FILTERS

How do you know if you should combine filters or add individual ones? If you combine filters, when you return to your report you will only be able to see the respondents who fit into the criteria you specified. However, if you add multiple individual filters, you can toggle each filter on and off and view the filters in different combinations.

DELETE OR HIDE A FILTER

To delete a filter, click **Add/Edit Filter** to bring up the list of filters. Select the **Delete** link to the right of the filter name. If you want to hide the filter instead of permanently deleting it, click **Active** to change the status of the filter to Inactive, or uncheck the filter in your report.

EDITING SAVED FILTERS

To edit a previously created filter, click **Add/Edit Filter**, and then click **Edit** to the right of the filter name in the filter list.

CROSS TAB ANALYSIS

WHAT IS CROSS TAB ANALYSIS?

If you would like to compare two or more variables side by side, you can use our powerful cross tab feature. In statistical terms, a cross tabulation displays the joint distribution of two or more variables. A report shown in Cross Tab mode will be displayed as a table, where each column represents the respondents who selected a particular answer choice. This feature is useful to help you answer questions such as:

- What percentage of males purchased an item at our store?
- Are males more satisfied with our products than females?

You can view the interaction between two questions and a distribution of how users responded to both of them.

Filter: ✓ Male ✓ Female ✓ Total (Male & Female) ✓ New Filter add/edit filter	Male	Female	Total (Male & Female)	New Filter
(P1-Q1) Please select your gender.				
Male	100.00%	0.00%	56.94%	41.00%
Female	0.00%	100.00%	43.06%	31.00%
Other (please specify)	0.00%	0.00%	0.00%	28.00%
(Total Answered Question)	41	31	72	100
(Total Skipped Question)	0	0	0	0

HOW TO CREATE A CROSS TAB REPORT

In order to create a cross tabbed report, you must create a report with at least one filter. (See Filter for more on creating filters)

1. Click the Reports icon on the top right of your screen, or click **Reports** in the sidebar.
2. Locate the survey that you want to report on, and click **New Report**. (If you click on the reporting icon while in a specific survey, only that survey will be displayed. To view another survey, click the reporting icon on the top right of your screen).
3. In the dialog box that appears, give your report a name that will help you refer back to it.
4. Check the box labeled 'Cross Tab Mode'
5. Add filters that correspond to the respondents that you want to compare.
6. Click **Save & View**.

ⓘTIP: To make cross tab reports easier to understand, make sure you give your filters easily identifiable names, like 'Females' or '18-25 Years Old.'

You can view any previously created report in Cross Tab mode by switching the Cross Tab **On/Off** switch at the top of the report viewer to ON.

EXPORTING CROSS TABBED REPORTS

See **EXPORTING DATA**.

SHARING A REPORT

You can create a link to share a report with others, without requiring that the recipient have a log in and password.

HOW TO SHARE A REPORT

1. In the Reports Manager, locate the name of the report that you wish to share.
2. In the **Actions** drop down menu, click **Share**.
3. Click **Create URL Link** to generate a link to your report.
4. To share the link, simply copy and paste it and send it to whomever you wish.

The links that are generated are dynamic, and will be automatically updated with new responses as they are collected.

EDITING OR RETRIEVING URL'S

To retrieve a previously created URL to a report, simply choose **Share** from the **Actions** drop down of the report. This will bring up your saved URLS.

You can make any link inactive by unchecking the **Active** check box to the right of the URL, or delete it completely by clicking on the **X**.

EXPORTING DATA

You can export and download your survey responses and reports, regardless of whether the survey is open or closed. The reports will include all current responses and will be in CSV (Microsoft Excel compatible) format.

HOW TO EXPORT SURVEY DATA

Click on Reports on the sidebar or on the Report icon in the top right corner of your screen. Click **Actions** to the right of the report that you would like to export, and click on Export. You can also do the same steps while viewing a specific report.
There are two different kinds of reports that can be downloaded.

1. **A Complete Report:** includes all survey question results with calculated percentages and response counts
   Example:

(P1-Q1) Which one of these animals is your favorite?		
	(Count)	(Percent)
Dog	6	11.54%
Cat	5	9.62%
Fish	11	21.15%
Bird	11	21.15%
Rabbit	4	7.69%
Turtle	8	15.38%
Other	1	3.46%
(Total Answered Question)	52	
(Total Skipped Question)	0	

2. **Raw Data File:** includes all the raw data for each respondent
   Example:

Respondent ID	Date	IP Address	Distribution Method	*(P1-Q1) Which one of these animals is your favorite?*
31157	1/7/2013 10:13	192.168.1.8	New Web Link	Monkey
31163	1/7/2013 13:50	127.0.0.1	New Web Link	Rabbit

HOW TO EXPORT A REPORT

1. Click on **Reports** on the sidebar or on the Report icon in the top right corner of your screen. Click on **Actions** to the right of the report that you would like to export, and click on **Export**. You can also do the same steps while viewing a specific report.
2. You can choose to apply any active filters to your exported document.

3. To apply the current filters, simply check the box labeled 'Apply Current Active Filters'.
4. Check the box labeled 'Include Open-Ended Responses' in Report if you would like your exported document to include open ended responses to questions (such as a comment) in addition to the calculated percentages and response counts.
5. After you select all of your choices above, click on **Continue and Export**. You will be redirected to the Export Manager, with your most recent export on top.
6. To download your report to your computer, click the arrow symbol on the far right.

A complete report will include a main report file, and a separate file for each question with an open ended response.

Please Note: If your report is in cross tab mode, your report will be exported in cross tab mode as well.

HOW TO EXPORT RAW DATA

1. Click on **Reports** on the sidebar or on the Report icon in the top right corner of your screen. Click on **Actions** to the right of the report that you would like to export, and click on **Export**. You can also do the same steps while viewing a specific report.
2. You can choose to apply any active filters to your exported document. To apply the current filters, simply check the box labeled **Apply Current Active Filters**.
3. After you select all of your choices above, click on **Continue and Export**. You will be redirected to the Export Manager, with your most recent export on top.
4. To download your report to your computer, click the arrow symbol on the far right.

UNDERSTANDING YOUR DOWNLOADED REPORTS

Main Report: Will include each question in your survey with the title as its own row. Each possible response will be in a row, with the response count and percentage in columns to the right. Below the response, the total number of respondents who answered or skipped the question will be listed. For numerical text boxes, a ranking column will appear with the ranking percentage for each response. Responses to questions with a matrix of choices will be shown in side by side columns. Additional files will be generated for each question with an open ended response, and will include each individual response listed by date, with the IP address and responses.

Raw Data: The raw data file will list each responded with their respondent ID, date taken, IP address and distribution link along with all their responses to open ended questions.

If you chose to export your report with filters applied, only those respondents who meet the specific filter criteria will be included in your report.

RETRIEVING PREVIOUS DOWNLOADS

You can retrieve previous downloads at any time by clicking on **Reports**, and then **Export Manager** in the sidebar. This is useful if you would like to compare a previous report with a more recent report.

FAQ's

Q: Can I Copy a Question From a Previous Survey?

A: The easiest way to do this is to open your other survey in a new tab, copy and paste the question text into the text editor, then copy and paste the response choices into the editor.

Q: Can I Add an Introduction to my Survey?

A: Yes! Use the **SECTION HEADER** question type to enter your instructions and insert it at the beginning of your survey.

Q: How Can I Add Terms & Conditions or a Privacy Policy to my Survey?

A: Add a **RADIO BUTTON MULTIPLE CHOICE (ONE ANSWER)** question to your survey. The question text should your be your terms or policy, and the response choices should be 'Yes, I agree' and 'No, I do not agree.' Make sure to make your question required in the question editor, so respondents can't skip over it.

To automatically disqualify respondents who select 'No':

1. Click the **+ Page Jump** button at the bottom right corner of the page that contains your Yes/No question.
2. Create your rule by choosing the question the Radio Button question with your terms and setting the rule to: If P1Q1 IS EQUAL TO 'NO, I DO NOT AGREE' THEN END SURVEY.

Q: Can I Add An Other/Comment Box Where There is No Option in the Question Editor?

A: You can use a form (see **HOW TO USE FORMS**) to add an 'other' or 'comment' response to multiple choice questions that don't have that option included, such as image choice questions. From the question editor, click the 'create new form' link to navigate to the form creator. Name your form 'Other' and Drag an Input box into your form; label it 'other.' Save and close to return to your survey, and add the new form you just created by choosing it from the dropdown menu. This form will now be available for use in all your surveys.

Q: How Can I Collect Contact Info While Keeping Survey Responses Anonymous?

A: Create a second survey, completely separate from your original survey. Add a 'Contact Info' question and then navigate to the distribute tab to generate a **Web Link** for the new survey. Return to your original survey, and add a 'Section Header' question to the last page. Insert your link, along with any instructions you want to provide. Make sure to inform users that their contact info will not be connected to their responses. You will be able to download the responses to your survey as well as the contact information, without there being any link between the two.

Q: How Can I Brand My Survey With My Company Logo?

A: It is easy to add your logo to your survey.

1. Click on **Edit Settings** at the top of your survey editor.
2. In the Advanced Settings section, click **Choose File** next to 'Upload Logo.'
3. Select a file from your computer. The optimal logo size is 300 x 100 pixels. If your logo is too large, it may obstruct the text in your survey.
4. Click **Save**. The logo will be inserted into your survey and can be viewed in Preview mode.

Please Note: If you would like to insert your image with a transparent background, use a PNG file type.

Q: Can I Hide the Title of my Survey from being Displayed to Respondents?

A: To hide the survey title:

1. Click **Edit Settings** at the top of your survey (next to the survey title).
2. Underneath the active theme, click **edit**, or if you are already using a custom theme click **customize**.
3. Navigate to the 'Survey Title' tab and click choose color next to 'text.'
4. Move the slider all the way to the left to make the title transparent.
5. Click **Save & Close**.

Q: How Can I Clear Test data?

A: To clear the data from a testing phase:

1. Click Distribute in the sidebar and locate the distribution method(s) you used to collect your responses.
2. Click the **Actions** drop down menu to the right of the distribution method and click on **Clear Responses.** A warning box will appear notifying you that the responses will be permanently deleted. Click Delete Responses to continue.

Repeat the steps above for all of the **Distribution Methods** you used to collect test responses.

Q: How Can I Add A Coupon Or Reward To The End Of My Survey?

A: If you want to reward survey respondents with a coupon or promotion, simply add an image of your coupon using an 'Image' special question type, or enter the coupon code using the 'Section Header' special question type. Create a new page at the end of your survey.

Q: How Can I Subscribe Contacts to a List?

A: You can use SurveyAct's **EMAIL SUBSCRIPTION** question type to allow respondents to sign up to be a part of a contact group that regularly receives your surveys.

1. Create a new survey and add an E-mail Subscription question, or add it to an existing survey.
2. In the question editor, enter the question text and choose the e-mail group that you would like respondents who fill out the form to be subscribed to.

The default field labels are e-mail address, first name, last name. The responses to these fields will be automatically saved in your chosen e-mail group and can be used to send future surveys via E-mail Campaigns.

It is a good idea to include a message in the question box explaining to respondents that by providing you with their contact information, they are agreeing to receive future surveys from you.

You can use Page Jump rules (see **HOW TO ADD PAGE JUMPS TO YOUR SURVEY**) if you want to only allow certain respondents to subscribe to your surveys.

Q: Can I Use a QR Code to distribute my survey?

A: It is easy to use a QR Code to collect responses for your survey.

1. Create a **Web Link** Distribution method and copy the link that is generated.
2. Go to a free QR Code generator, such as beqrious, and paste your web link in the 'Web URL' field.
3. Generate your QR code, and place it wherever you like to be scanned by potential respondents.

Responses collected via the QR code will be saved in your Distribution Methods under the web link you used to generate the QR Code.

Q: Can I assure respondents that their personal information is not being tracked?

A: Absolutely! In the settings of the **Distribution Method** that you are using to collect responses (located in the **Actions** drop down menu to the right of every distribution method), change Collect IP Addresses to Off. No personally identifying information will be recorded.

Q: Can I share my results on social media sites?

A: To share your results on any social media site, use the Share feature to create a URL.

1. In the Reports Manager, locate the name of the report that you wish to share.
2. In the **Actions** drop down menu, click **Share**.
3. Click **Create URL Link** to generate a link to your report.
4. To share the link on your social media accounts, simply copy and paste it into your status.

Q: Why is there a line through the email address of some of my contacts?

A: If a contact unsubscribes from your emails, they will be shown in your contact groups with a line through their e-mail address and will not be counted in the total number of contacts in the group. You will not be able to send them any more emails.

Q: Can I see the responses that were collected by a specific distribution method?

A: You can export the raw data to excel and sort your responses by distribution method.

1. Click on **Reports** on the sidebar or on the Report icon in the top right corner of your screen. Click on **Actions** to the right of the report that you would like to export, and click on **Export**. You can also do the same steps while viewing a specific report.
2. Click on **Continue and Export**. You will be redirected to the Export Manager, with your most recent export on top.
3. To download your report to your computer, click the arrow symbol on the far right.
4. In the Excel document that opens up, there will be a column called 'Distribution Method.' Sort by this column alphabetically to view all responses collected with a specific distribution method.

Q: How can I redirect respondents to a promotional URL?

A: There are two different ways to redirect your respondents to a promotional URL.

Option 1: To redirect ALL respondents who complete the survey to a promotional URL, you must first create a new distribution method (see **DISTRIBUTE**). When you create your distribution, one of the optional settings is **Redirect at Survey Completion:** By default, once respondents complete your survey they will be redirected to the SurveyAct home page. To redirect respondents to your own page, simply enter the full URL (beginning with http://) into the box.

If you create multiple distribution methods, you must make sure to change the settings for each one. If your individual distribution methods are targeting different groups, you can also enter different URL's for each group.

If you already created your distribution methods and want to add a URL, you can access the settings on the Saved Distribution Methods page by clicking on the **Actions** drop down menu and then clicking on **Settings**.

Option 2: To redirect different respondents to different URL's based on their responses, OR to redirect respondents who will not be completing the survey (ie, who are disqualified in the first question), use Page Jumping (see **HOW TO ADD PAGE JUMPS TO YOUR SURVEY**). When you create your IF/THEN rules statement, one of your 'THEN' options is **End Survey & Go To URL.** This will redirect any respondent who meets your conditions to the URL you specify. You can add as many conditions as you like using **ADVANCED PAGE JUMP RULES**, or put the rules at any point in your survey.