

Create or Edit a Survey



You can use Surveys to design, test, and deploy questions to your visitors to gather explicit feedback. The data collected from surveys can then be used to create user segments, enhance personalization experiences, A/B test to validate business impact, and analyze feedback results.

This Article Explains



This article details how to design, test, and deploy questions to your visitors to gather explicit feedback.

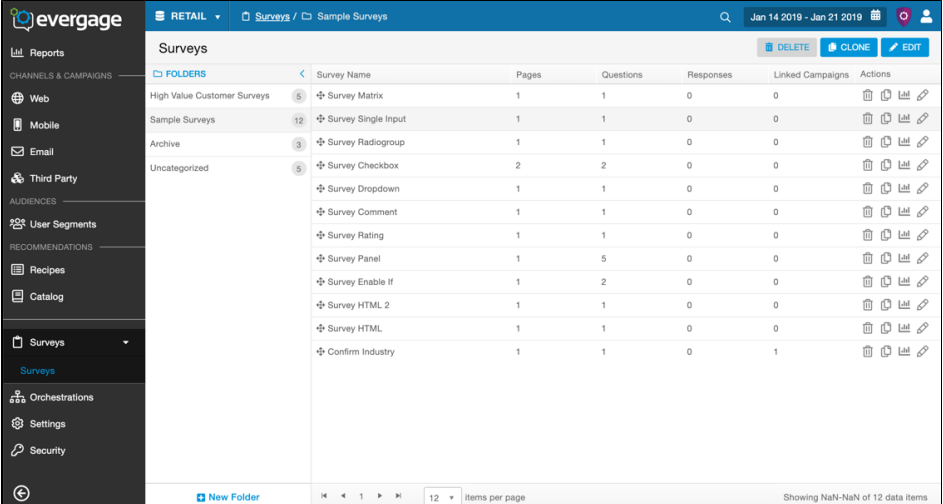
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This is an enhanced Evergage feature. Please contact your Customer Success representative for more information.

Create or Edit a Survey

1. Log into the *Evergage Platform*
2. Select **Surveys**
3. Edit an existing survey:
 - a. Select the survey folder
 - b. Double click the survey or click 
4. Create a new survey:
 - a. Click **+New Survey**
 - b. Enter a *Survey Name*
5. Clone a survey:
 1. Select the survey you want to clone
 2. Click 
 3. The cloned survey will appear in the *Uncategorized* folder

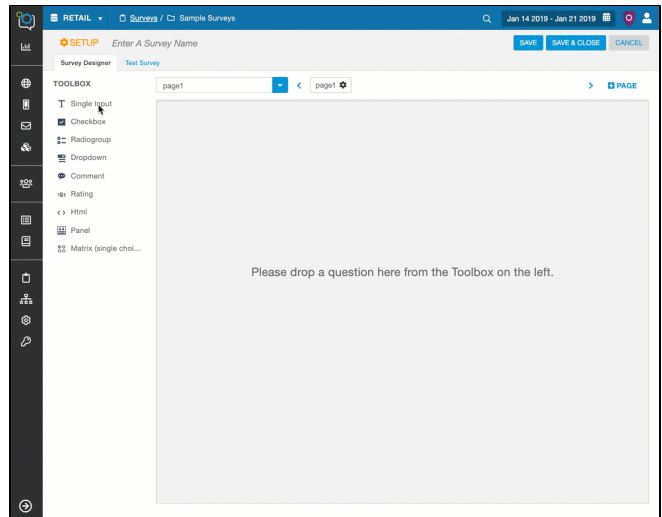


| FOLDERS | Survey Name | Pages | Questions | Responses | Linked Campaigns | Actions |
|-----------------------------|---------------------|-------|-----------|-----------|------------------|---------|
| High Value Customer Surveys | Survey Matrix | 1 | 1 | 0 | 0 | |
| Sample Surveys | Survey Single Input | 1 | 1 | 0 | 0 | |
| Archive | Survey Radiogroup | 1 | 1 | 0 | 0 | |
| Uncategorized | Survey Checkbox | 2 | 2 | 0 | 0 | |
| | Survey Dropdown | 1 | 1 | 0 | 0 | |
| | Survey Comment | 1 | 1 | 0 | 0 | |
| | Survey Rating | 1 | 1 | 0 | 0 | |
| | Survey Panel | 1 | 5 | 0 | 0 | |
| | Survey Enable If | 1 | 2 | 0 | 0 | |
| | Survey HTML 2 | 1 | 1 | 0 | 0 | |
| | Survey HTML | 1 | 1 | 0 | 0 | |
| | Confirm Industry | 1 | 1 | 0 | 1 | |

You cannot save a SmartSurvey until you have added at least one question to each page of the survey

Add Questions




1. In the *Toolbox*, click the question type you want to add a new question to your survey directly below the previous question
2. Alternatively, drag and drop the question in the location you want it
3. For more information on question types, please refer to [Understanding Survey Types](#)

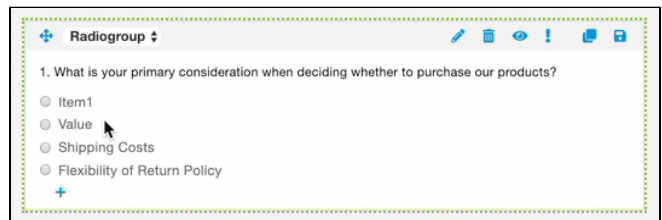


Enter Question/Answer Choices



There are two ways to enter the question and answer choices for most survey question types.

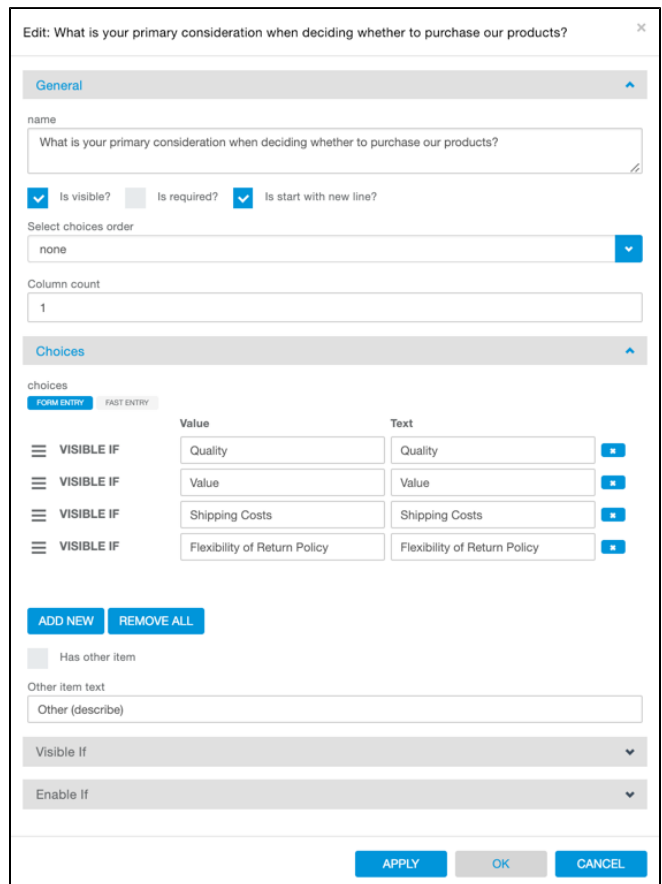
Quick Edit

1. Click a question or answer to edit the text
2. Click  or click off the question or answer to close the editor
3. Click  to add another answer option
4. Click  to manually move the order of the answer options



Question Editor

1. Click  next to the question
2. Edit the question name in the *name* field
3. Edit answers on the *Choices* tab
4. Enter each answer choice in the *Text* box (this will display to respondents)
5. Toggle between *Form Entry* and *Fast Entry* to quickly copy and paste answers from another source
6. Add an additional choice by clicking **Add New**
7. If the question type allows for it, select **Has other item** to add an "Other" answer with the space to provide additional detail
8. Manually arrange the choice order, by clicking  and dragging and dropping the question into the preferred choice order
9. See *Control Question Visibility* for details about how to adjust options in the Visible If and Enable If sections



Style Questions/Answers

Once you have entered a question, you can begin to style the question and answer choices, including:


- Change answer arrangement
- Reorder answer choices
- Control question visibility
- Require question completion
- Delete or clone a question
- Save a question to be used again in the same survey

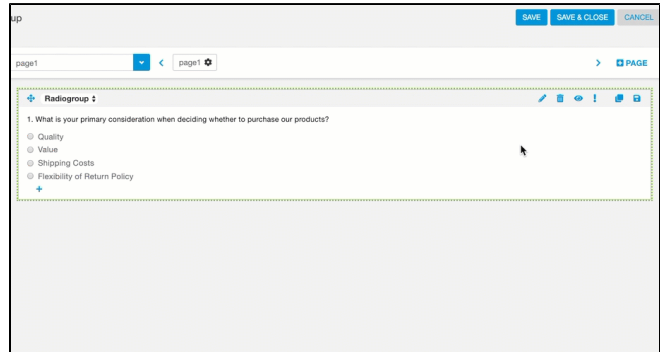
NOTE

If you would like your SmartSurvey to reflect the same styles as your website, you can apply styling through the Site-Wide CSS for your dataset or through the campaign message CSS. If you need assistance, please contact Evergage Support.

Change Answer Arrangement


You can display answers horizontally by adjusting the number of invisible columns containing the answers:

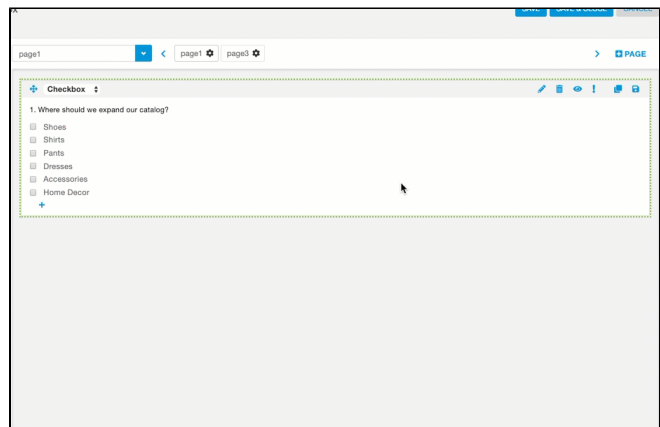
1. Click  next to the question
2. Click **Choices**
3. Increase the number in **Column count** (1 - shows all answers in one column; 2 - shows all answers in 2 columns; matching the number of columns to the number of answers will display all answers horizontally)
4. Click **OK**



Reorder Answer Choices

To re-order the answer choices in either ascending, descending, or random order:


1. On the *Survey Designer* tab, click  next to the question
2. Under **Select choices order**, choose:
 1. **None** - the order will remain as entered
 2. **Ascending** - A to Z order
 3. **Descending** - Z to A order
 4. **Random** - Randomized order
3. Click **OK**




Control Question Visibility

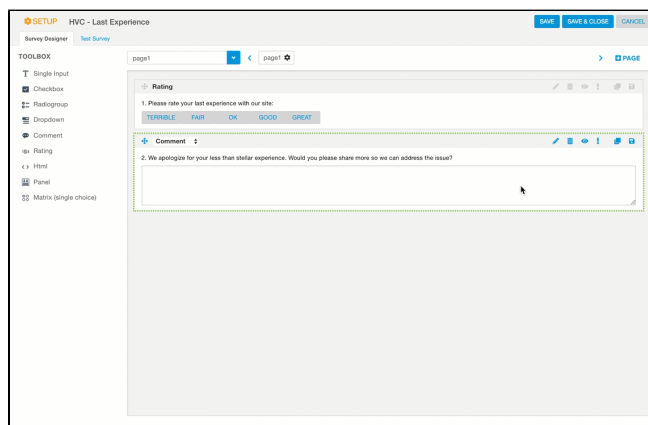
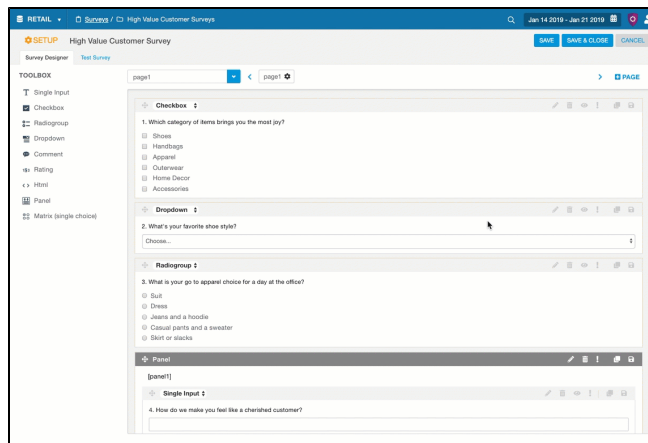
By default, all survey questions are visible to your visitors and customers that qualify for the survey campaign. You can make the question invisible, or you can apply visibility conditions to the question. Visibility conditions will always take priority over the *Is visible?* option.

Make a Question Invisible/Visible

1. On the *Survey Designer* tab, click 
2. Deselect **Is visible?**
3. Click **Test Survey** to confirm that the question is no longer visible
4. Click **OK**





Add Question Visibility Conditions

1. On the *Survey Designer* tab, click  next to the question
2. Click the *Visible If* tab
3. Select the question
4. Select the conditions and value
5. Click **ADD**
6. Repeat the process until all desired conditions have been captured
7. Click **OK**
8. Click Test Survey to confirm the survey is configured correctly



Other Question Options

The following options are available on the *Survey Designer* tab next to each question.

1.  - select to require question completion. Once selected, you can turn this option off by clicking the blank space where this option was
2.  - select to delete a question
3.  - select to clone a question
4.  - save a question as a template so you can select it from the Toolbox for reuse in the same survey

