

# 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.



## Sections in this Article

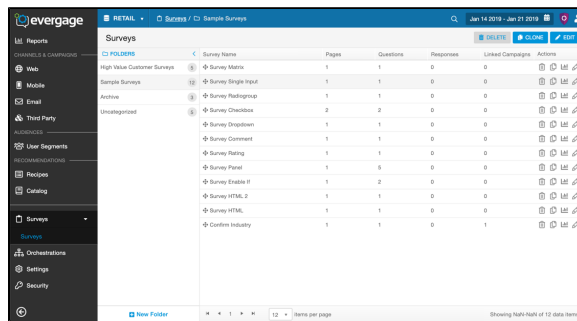
- [Create, Edit, or Clone a Survey](#)
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This is an enhanced Evergage feature. Please contact your Customer Success representative for more information.

## Create, Edit, or Clone a Survey

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



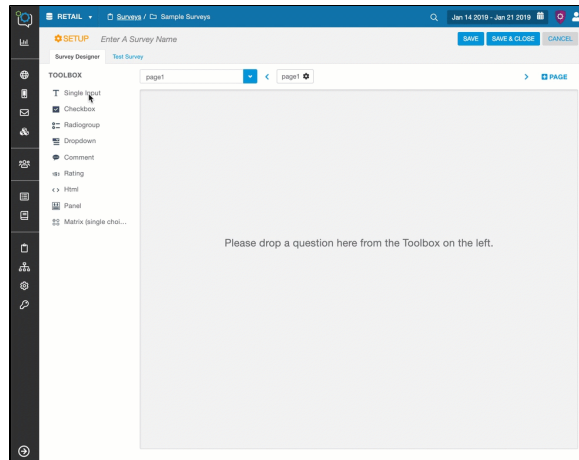
| Survey Name                | Pages | Questions | Responses | Linked Campaigns | Actions |
|----------------------------|-------|-----------|-----------|------------------|---------|
| High Value Customer Survey | 1     | 1         | 0         | 0                |         |
| Sample Survey              | 1     | 1         | 0         | 0                |         |
| Another                    | 1     | 1         | 0         | 0                |         |
| Uncategorized              | 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     | 8         | 0         | 0                |         |
| Survey Feedback II         | 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 [Understand and Survey Question Types](#)

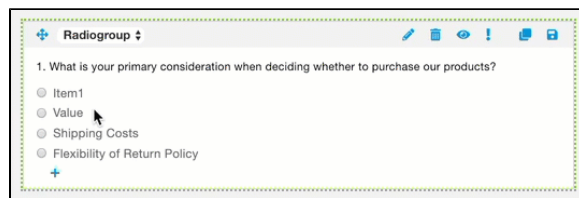


## Enter Question/Answer Choices

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

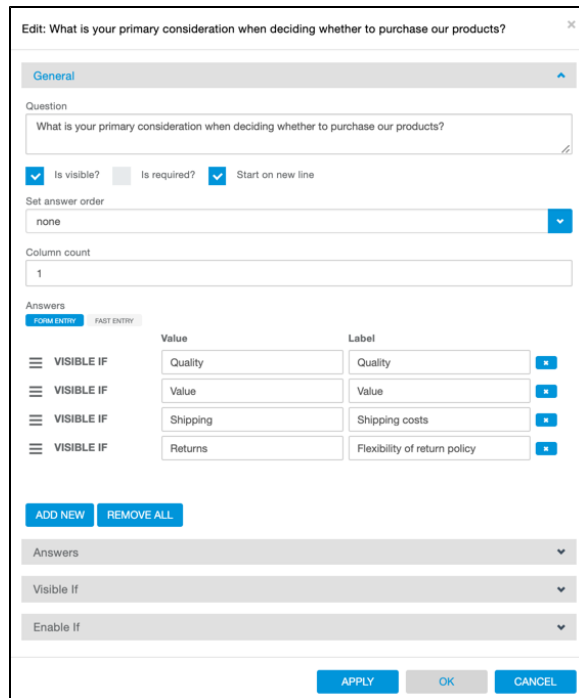
### Quick Edit

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 at the right on the gray header bar for the question
2. Edit the question name in the *Question* field
3. Edit answers in the *Answers* section
4. Enter each answer choice in the *Label*/field (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](#)

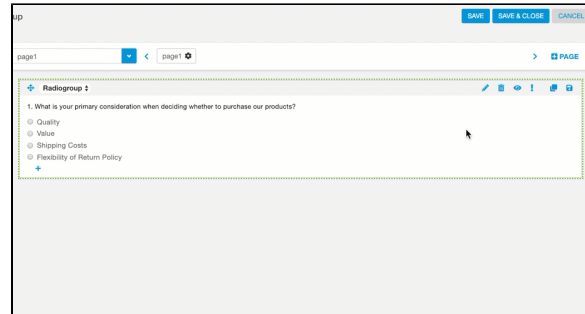
## NOTE

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


For *radiogroup* and *checkbox* question types you can display answers horizontally by adjusting the number of invisible columns containing the answers:

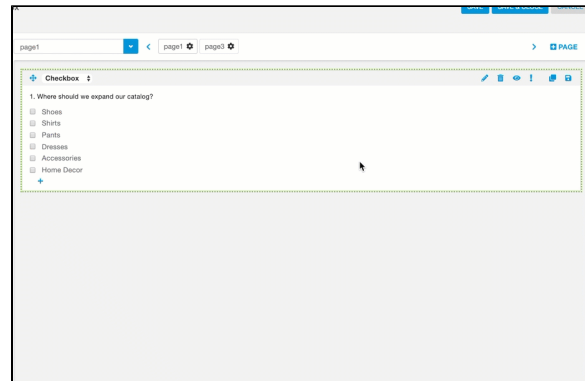
1. Click  next to the question
2. Increase the number in **Column count** (1 - shows all answers in one column; 2 - shows all answers in 2 columns; matching the number of columns to the number of answers will display all answers horizontally)
3. Click **OK**



## 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 answer order**, choose:
  - a. **None** - the order will remain as entered
  - b. **Ascending** - A to Z order
  - c. **Descending** - Z to A order
  - d. **Random** - Randomized order
3. Click **OK**

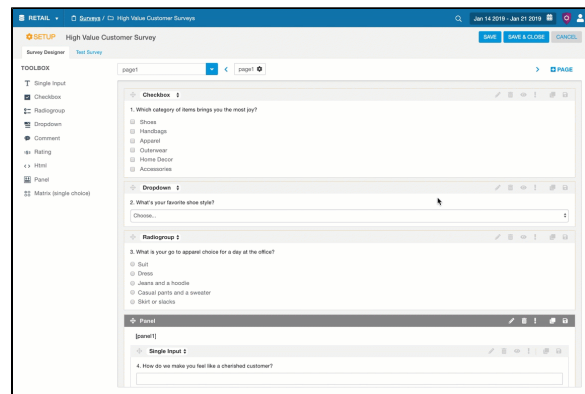


## Control Question Visibility


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

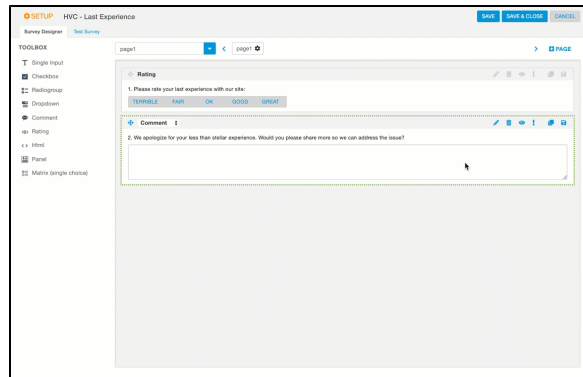
1. On the *Survey Designer* tab, click  next to the question you want change visibility for
2. Deselect **Is visible?**
3. Click **OK**
4. Select the *Test Survey* tab to confirm that the question is no longer visible



## Add Question Visibility Conditions






1. On the *Survey Designer* tab, click  next to the question
2. Click the *Visible If* drop down
3. Click **Select question** and choose 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. Select the *Test Survey* tab 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.  - show/hide question
4.  - select to clone a question
5.  - save a question as a template so you can select it from the Toolbox for reuse in the same survey

