

Create or Edit a Survey



New Name: Marketing Cloud Personalization

Interaction Studio (formerly Evergage) is now known as Marketing Cloud Personalization. The new name reflects our mission and vision for innovation in Salesforce Marketing Cloud. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in various places until we replace it.



You can use Surveys to design, test, and deploy questions to your website visitors to gather explicit feedback. Surveys are deployed in web campaigns, so you have access to the all of the rich [targeting rules](#) and [testing capabilities](#) in Interaction Studio. 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 surveys to your visitors to gather explicit feedback.

Sections in this Article

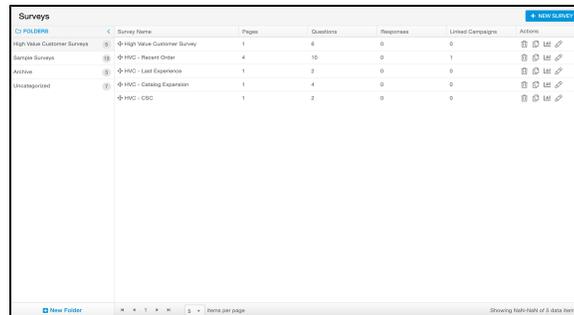
- [Create, Edit, or Clone a Survey](#)
- [Add and Arrange Questions](#)
- [Add Pages to the Survey](#)
- [Use the Setup Menu for Surveys](#)
- [Enter Question/Answer Choices](#)
- [Style Questions/Answers](#)
- [Control Question Visibility](#)
- [Other Question Options](#)
- [Survey Attributes](#)
- [Use Surveys in a Web Campaign](#)



Surveys are available to all premium edition customers. If your account was provisioned prior to 4/7/2021, you will need to request a gears refresh for your account from support in order for the Survey gear to show up in your gears list and for the feature functionality to be fully enabled. If you are unsure if a Gears refresh has occurred, please reach out to your account admin who will be able to view the gears list on your account. If a refresh occurred, they will see the Survey Gear in the list as enabled.

Create, Edit, or Clone a Survey

1. Log into *Interaction Studio*
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 another folder



	Survey Name	Pages	Questions	Responses	Linked Campaigns	Actions
High Value Customer Survey	High Value Customer Survey	1	4	0	0	
Sample Survey	High - Product Order	4	10	0	1	
Active	High - Lead Experience	1	2	0	0	
Uncategorized	High - Catalog Experience	1	4	0	0	
	High - CSC	1	2	0	0	



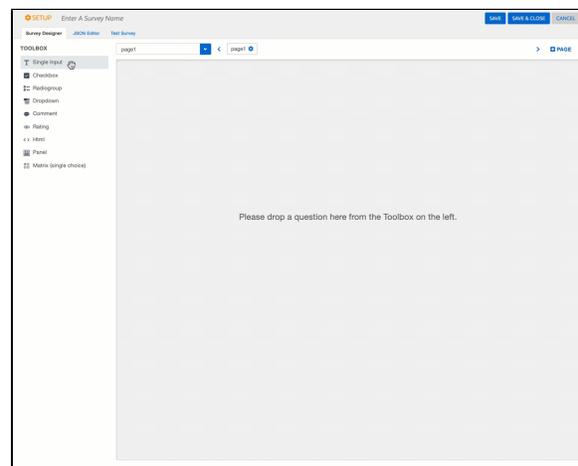
Creating, editing, and cloning surveys requires the "Configure Dataset" and Campaign permissions at or above "View". Work with your account administrator to ensure you have the proper permissions if you plan to work on Surveys in Interaction Studio.



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

Add and Arrange Questions

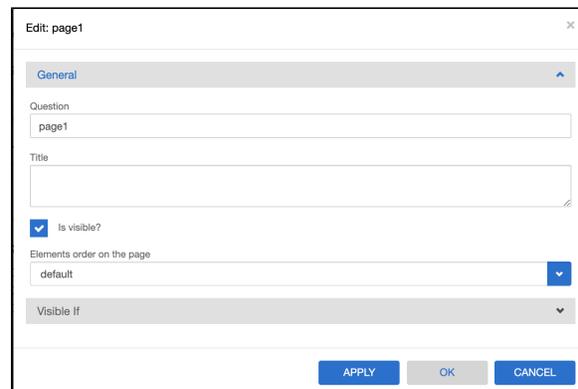
1. In the *Toolbox*, click the question type you want to add as a new question to your survey. Your question will be added directly below the previous question
2. Drag and drop a question to a new page or location
3. For more information on question types, please refer to [Understand Survey Question Types](#)
4. To place multiple questions next to each other, edit the question and uncheck **Start on new line**



Add Pages to the Survey

Surveys can list multiple questions on a single page. For longer surveys, you may want to use multiple pages to avoid overwhelming the respondent with questions. Pages also have the same conditional visibility controls as individual questions.

1. Add new pages in one of two ways:
 - a. Click **+Page**
 - b. From the Pages drop down, click **Add New Page**
2. Drag page icons to rearrange page order
3. Click the gear icon next to the page to edit page settings:
 - a. Change the name of the page for easy recognition
 - b. Change the title of the page, which appears as a header at the top of the page before any specific questions.
 - c. Toggle the visibility of the page, and set *Visibility* conditions.



Use the Setup Menu for Surveys

1. To the left of the *Survey Name* input field, click **Setup**
2. Select the section you want to adjust:
 - a. [General](#)
 - b. [Navigation](#)
 - c. [Survey Questions](#)

General

The options in this section control survey titling and pagination.

1. Enter a survey **Title**
2. Select options:
 - a. **Show/hide title**: select this check box to show the title or deselect to hide it.
 - b. **Send survey results on page next**: Select to send survey results after each page is completed. Deselect to send survey results at completion of the survey
 - c. **Show page titles**: Select to show page titles on each page of the survey
 - d. **Show page numbers**: Select to show page numbers on each page of the survey

The screenshot shows the 'Edit survey settings' dialog box with the 'General' tab selected. It contains a text input field for 'Title'. Below it are four checkboxes: 'Show/hide title' (checked), 'Send survey results on page next' (unchecked), 'Show page titles' (checked), and 'Show page numbers' (unchecked).

Navigation

The options in this section control survey navigation and behavior.

1. Edit survey navigation button text:
 - a. *Page previous button text* - defaults to Previous and navigates survey respondents to the previous page
 - b. *Page next button text* - defaults to Next and navigates survey respondents to the next page
 - c. *Complete button text* - defaults to Complete and submits the survey
 - d. *Start button text* - defaults to Start and starts the survey
2. Select options:
 - a. **Show navigation buttons** - select to show all navigation buttons
 - b. **Show previous button** - select to allow survey respondent to return to a previous page
 - c. **The first page in the survey is a started page** - select to show a welcome page as the start page rather the first survey question. The developer can provide configurable options for this page in the campaign template.
 - d. **Show the completed page at the end (completedHtml)** - Enable to show the a completion page at the end of the survey. The developer can provide configurable options for this page in the campaign template.
 - e. **On answering all questions, go to the next page automatically** - select to automatically advance to the next page after the survey respondent answers all questions on the page
 - f. **Show progress bar** - select the location (top or bottom of the survey) for a progress bar for surveys with multiple pages
 - g. **Show all elements on one page** - select to show all questions (elements) on a single page.

The screenshot shows the 'Navigation' settings panel. It includes text input fields for 'Page previous button text', 'Page next button text', 'Complete button text', and 'Start button text' (with the placeholder text 'This is the start button!'). Below these are several checkboxes: 'Show navigation buttons (default navigation)' (checked), 'Show previous button (user may return on previous page)' (checked), 'The first page in the survey is a started page.' (checked), and 'Show the completed page at the end (completedHtml)' (checked). There is also an unchecked checkbox for 'On answering all questions, go to the next page automatically'. At the bottom, there is a dropdown menu for 'Show progress bar' set to 'top' and an unchecked checkbox for 'Show all elements on one page'.

Question

The options in this section control how questions are rendered and formatted.

1. Select **Question title location** as the top, bottom, or left of the question
2. Enter **the question required symbol(s)** to change the symbol that indicates that a question is required to proceed to the next page or complete the survey. The default symbol is "*".
3. Adjust the **question start index**, which controls the numbering (or lettering) system for questions.
4. Select whether to **Show question numbers**
 - a. **On** shows question numbers
 - b. **Off** disables question numbers
5. Enter the **Question title template** to change the default question title format. The default format shows the question

The screenshot shows the 'Question' settings panel. It includes a dropdown menu for 'Question title location' set to 'top'. Below it is a text input field for 'The question required symbol(s)' containing '*'. Another text input field for 'Question start index (1, 2 or 'A', 'a')' is empty. There is a dropdown menu for 'Show question numbers' set to 'on'. Below that is a text input field for 'Question title template, default is: '{no}. {require} {title}' which is empty. At the bottom, there is a dropdown menu for 'Question error location' set to 'top' and a checked checkbox for 'Focus first question on changing the page'.

number followed by the required symbol followed by the question title

6. Select **Question error location** as top or bottom to adjust the location of question error messaging, which displays when a survey respondent does not complete a required question. Note that the question error message cannot be customized.
7. Select **Focus first question on changing the page** to allow the survey respondent to immediately begin typing or answering the question, rather than needing to select the answer field.

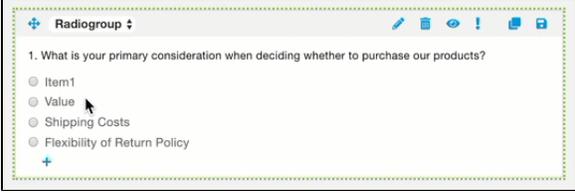
Enter Question/Answer Choices

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

Quick Edit

Many question types allow you to quickly edit in the main survey editor. If you're having trouble quick editing, please use the "question editor" method below.

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



The screenshot shows a 'Radiogroup' question editor. The question text is '1. What is your primary consideration when deciding whether to purchase our products?'. Below the question, there are four radio button options: 'Item1', 'Value', 'Shipping Costs', and 'Flexibility of Return Policy'. A mouse cursor is hovering over the 'Value' option. There are icons for edit, delete, and other actions at the top right of the editor.

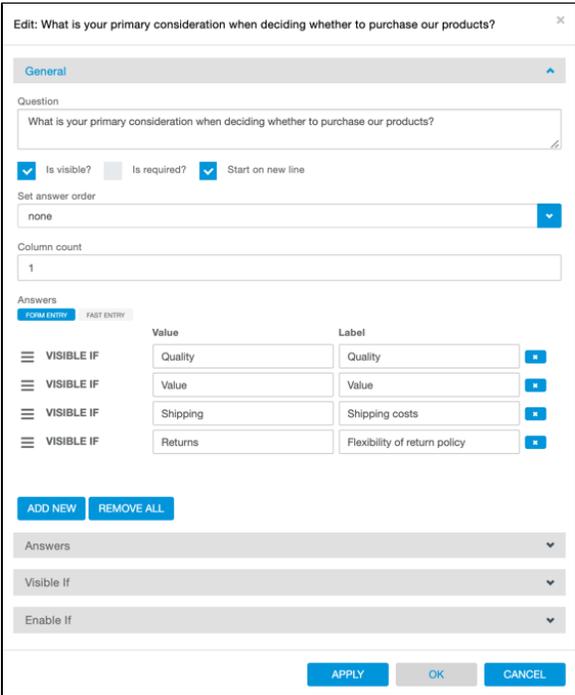
Question Editor

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). The *Value* field is what will be captured as a survey attribute on the user profile.
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** checkbox from the *Answers* section 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

If any conditional logic is used in the *Enable If* section, this logic will control whether the respondent can provide an answer to questions. Questions that do not meet the conditional logic will still display, but the respondent will not be able to answer them.



When using the *Fast Entry* option to add answers, the inputs for *Value* and *Label* are pipe delimited. However, if you do not have separate entries for *Value* and *Label*, entering a single string for an answer will automatically fill in entries for both.



The screenshot shows the 'Question Editor' for the question 'What is your primary consideration when deciding whether to purchase our products?'. The 'General' tab is active. The question text is in the 'Question' field. There are checkboxes for 'Is visible?' (checked), 'Is required?' (unchecked), and 'Start on new line' (checked). The 'Set answer order' dropdown is set to 'none'. The 'Column count' is set to '1'. The 'Answers' section is in 'Form Entry' mode. It shows a table with columns for 'Value' and 'Label'. There are four rows of answers: 'Quality', 'Value', 'Shipping', and 'Returns'. Each row has a 'VISIBLE IF' checkbox and a 'REMOVE' button. There are 'ADD NEW' and 'REMOVE ALL' buttons. At the bottom, there are 'ANSWERS', 'VISIBLE IF', and 'ENABLE IF' dropdowns, and 'APPLY', 'OK', and 'CANCEL' buttons.

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



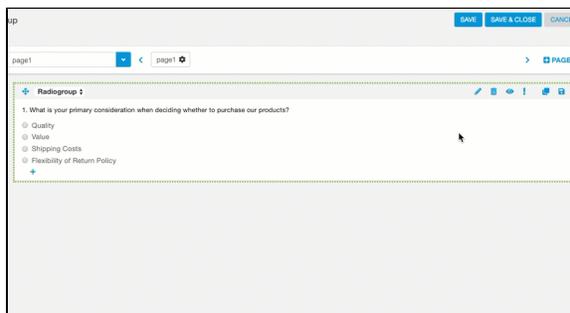
NOTE

If you would like your survey to reflect the same styles as your website, you can apply styling through the Site-Wide CSS for your dataset or through the template CSS.

Change Answer Arrangement

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

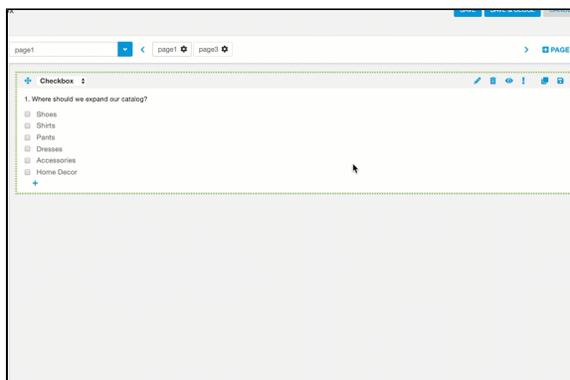
1. Click  next to the question
2. Increase the number in **Column count** (1 - shows all answers in one column; 2 - shows all answers in 2 columns; matching the number of columns to the number of answers will display all answers horizontally)
3. Click **OK**



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**

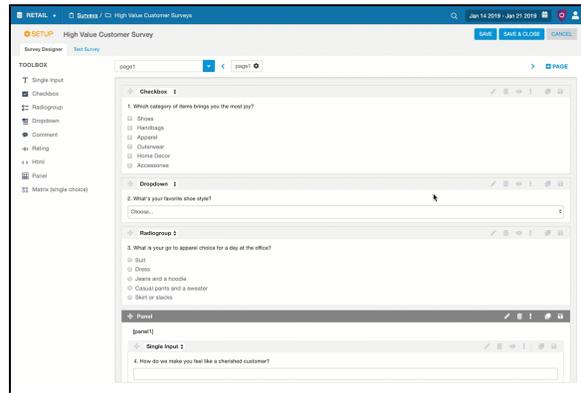


Control Question Visibility

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.

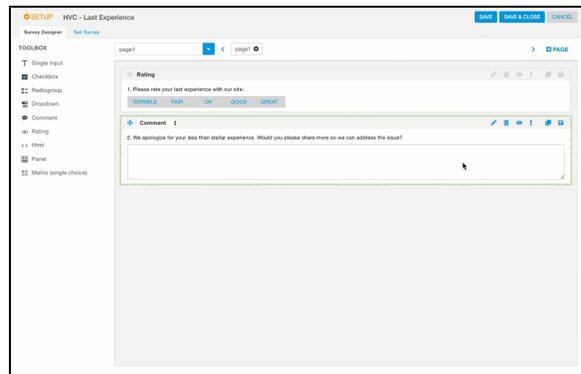
Make a Question Invisible/Visible

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

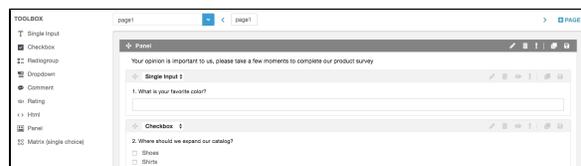
1. On the *Survey Designer* tab, click  next to the question
2. Click the *Visible If* drop down
3. Click **Select question** and choose the question
4. Select the conditions and value
5. Click **ADD**
6. Repeat the process until all desired conditions have been captured
7. Click **OK**
8. Select the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

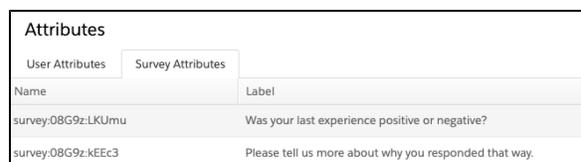
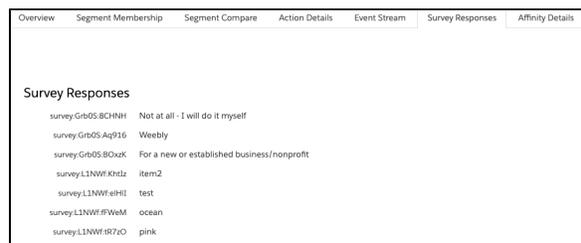
1.  - select to require question completion. Once selected, you can turn this option off by clicking the blank space where this option was
2.  - select to delete a question
3.  - show/hide question
4.  - select to clone a question
5.  - save a question as a template so you can select it from the Toolbox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



Survey Attributes

Survey responses can be [used in segmentation](#) to build segments of users who provided specific answers to each question. Creating and saving a survey automatically creates a survey attribute in the same dataset. Responses to survey questions are stored on the User Profile under the *Survey Responses* tab, which will only be available in profiles where the user has answered a survey question.

The full list of survey attributes are available on the [attributes](#) screen, on the *Survey Attributes* tab. These attributes can only be edited by editing survey questions in the survey editor, not on the attributes screen, only by editing the questions in the survey editor. However, you can find the individual Survey and Question IDs on the **Attributes > Survey Attributes** screen.



**NOTE**

Interaction Studio Surveys allows 10 Survey Attributes per dataset. A survey attribute is automatically created every time a survey question is added to a survey.

Use Surveys in a Web Campaign

Surveys can be added to a web campaign template by your developer using the documentation available on developer.evergage.com. Once added, a developer can style the survey using the same techniques used for other campaign development.

**NOTE**

For Interaction Studio (formerly Evergage Classic) customers, please reference this [article](#) on how to use Surveys in a campaign.