fibrecrm HEART OF THE PRACTICE

Visit **support.fibrecrm.com** for more info or contact your CRM Manager

Creating a Survey

To create a survey • navigate to the Surveys module in the Navigation Menu. In the module select the Create Survey option on the side bar menu.

⊲ SUF	RVEYS	Mare A
SUF	RVEYS	Nors A
		Name A
0-	BULK ACTION-	
	/	Retirement P
	1	TEST Survey

2. On the Create Survey screen, type in a name for your survey. You can also; type in a Description, change the Status, and use the tick boxes to Enable Thanks Display, Show Description Message on Survey Page or Redirect on Completion

CREATE					
SAVE AND CLOSE SAVE CANCEL					
BASIC					
Name:*		1	Assigned to:	Bob Smart	R ×
Status:	Draft				
Enable Thanks Display:					
Show Description Message on Suvery Page:					
Description:					

3. Click the New Question button to add a question to the survey. To put questions into sections click New Section. Once selected you can add a heading for the section in the

	Tovt field	Questions:	Question	Text	Туре	Actions
Q1 Doymphy tail Dradown S △ V × Q Views Q Views Q Q Question Link Q Q Q2 Peace specify Ten ✓ × Q2 Peace specify Ten ✓ × Settion ✓ × ×	Text Held.		Section	Tax		△ ▽ ×
Q2 Pesse specify Text A V X Settion ADD OFFICION A V X			Q1	Do you pay tax?	Dropdown	△ ▽ ×
Officinit Question Link Image: Control Question Link Image: Control Question Link Optional Question Link Image: Control Question Link Image: Control Question Link OP People's specify Text Image: Control Question Link OP Section Image: Control Question Link Image: Control Question Link OP People's specify Text Image: Control Question Link Section Image: Control Question Link Image: Control Question Link NEW SQUESTION Image: Control Question Link Image: Control Question Link					Options	
No Optional Quantito Link Other Optional Quantito Link Optional Quantito Link ADD OPTION General Section NEW SQUESTION					Optional Question Link	
Optional Question Link Image: Control Co					No	
Other Other Optimul Question Link Q ADD OPTION C2 Peace specify Test Δ Settern NEW SQUESTON NEW SQUESTON					Optional Question Link	
Optimizing Quantity Line Line O2 Pesser specify Section Line					Other	
Q2 Peace specify Test ▲ ▼ ★ Section ▲ ▼ ★ ★ NEW QUESTION NEW SECTION ★ ★ ★					ADD OPTION	
Section 🖉 🗶			Q2	Please specify	Text	△ ▽ ×
NEW QUESTION NEW SECTION			Section			△ ▽ ×
			NEW QUEST	ION NEW SECTION		

4. Enter the Question Text and select the Question Type from the dropdown list. If you select a Dropdown, Multiselect or Radio question you can add Optional Question Links which means when a person selects an answer with an optional question link enabled it directs them to answer more optional questions. To delete a question from the survey go to the Actions section: Click the X button and to change the order of the questions: Click on the Up and Down arrows. To customise the responses for Matrix type questions by editing the default matrix response text in Text boxes. Once you've added all the information you require select Save & Close.

Questions:	Question		1954	2000
	Section	Tax		
	Q1	Do you pay tax?	Dropdown	
			Options	
			Optional Question Link	×
			No	
			Optional Question Link	×
			Other	
			Optional Question Link Q2	×
			ADD OPTION	
	Q2	Please specify	Text	△ V ×
	Section			△ ▽ ×
	NEW QUES	TION NEW SECTION		
Submit Text:	Submit			
Satisfied Text:	Satisfied			
Neither Text:	Neither Satisfie	d nor Dissatisfied		
Dissatisfied Text:	Dissatisfied			

5. The survey will now be displayed. *Note: The URL to the Survey will only displayed if the Status of the survey is set to Public. To make any changes to the survey or change the status select Edit in the Actions Menu.* Click the Survey URL to view/complete the survey. The URL can copied and pasted to be used in your revelant marketing communication templates.

it uplicate	NPS Survey	Assigned to:
lt		

Once you have sent out the survey, responses can be view either by navigating to the Actions Menu and selecting View Survey Responses or by scrolling down to the Survey Response subpanel.

Y SURVEY RESPONSES (1) Name tions NPS Survey - Jeremy Armstrong

10-06-2020 13:43

Date Modified