



Business Communication Enterprise Suite

Nextiva Surveys

VERSION 2.4

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Product Summary

The Business Communication Enterprise Suite provides Nextiva customers with an array of communication options, including Nextiva Surveys. Use Nextiva Surveys to understand customer and employee needs and collect vital data necessary for making optimal business decisions.

This document covers the following topics:

- Creating Surveys
- Survey Templates
- Managing Surveys
- Viewing Survey Reports
- Downloading Survey Results

Product Requirements

A Business Communication Enterprise Suite license is required to take advantage of features detailed in this guide. If the features described in this User guide are not available, please reach out to an Administrator.

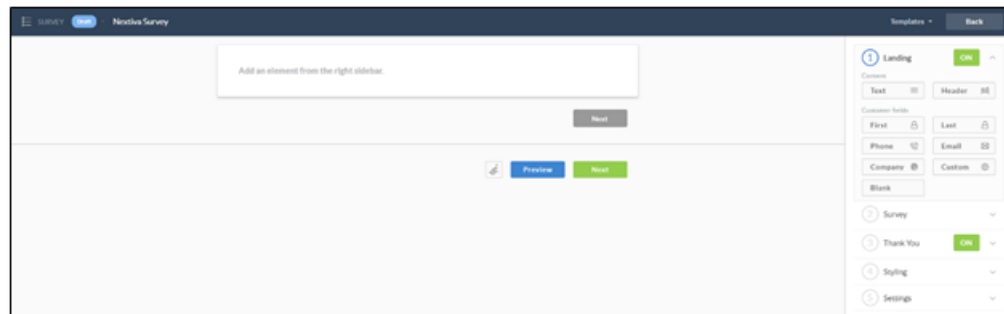
Nextiva Surveys require:

- An active Internet connection
- Access to a web browser, such as Google Chrome, Internet Explorer, or Mozilla Firefox
- An active Nextiva Business Communication Suite account

Creating Surveys

With Nextiva Surveys, businesses can create surveys to gather data from customers to better understand needs. Businesses can design short or long surveys, use a variety of question types, and easily customize the survey experience with their company branding.

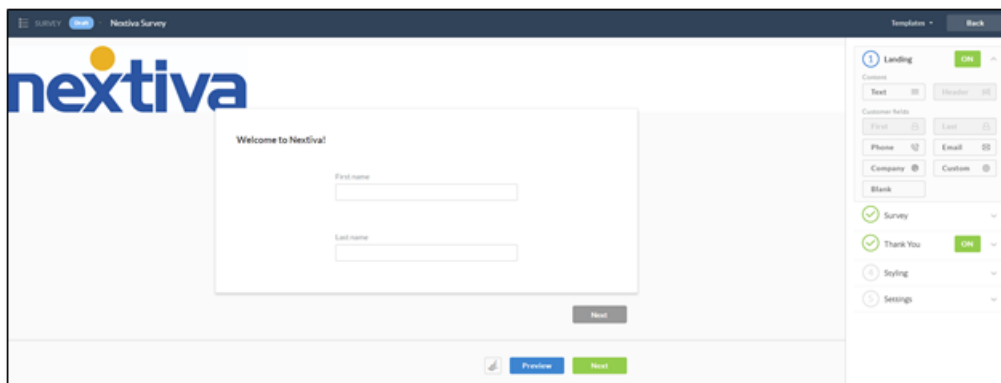
1. Visit www.nextiva.com, and click **Client Login** to log in to NextOS.
2. From the NextOS Home Page, select **Surveys**.
3. From the **Manage Surveys** window > **Create Survey** > Enter a name for the survey.



Survey Editor

4. Design the Landing page for the survey. The Landing page describes the survey and gathers initial information from the customer. Add and customize any of the Landing page elements from the sidebar. Click the grey **Next** button to customize it.

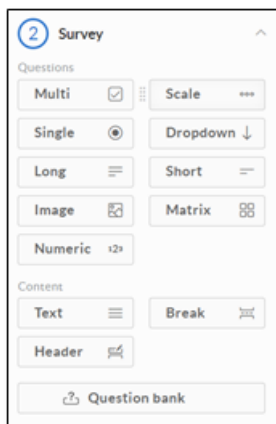
NOTE: Turn the **Landing** page **ON** or **OFF** by clicking the **ON/OFF** button. By default, it is turned on.



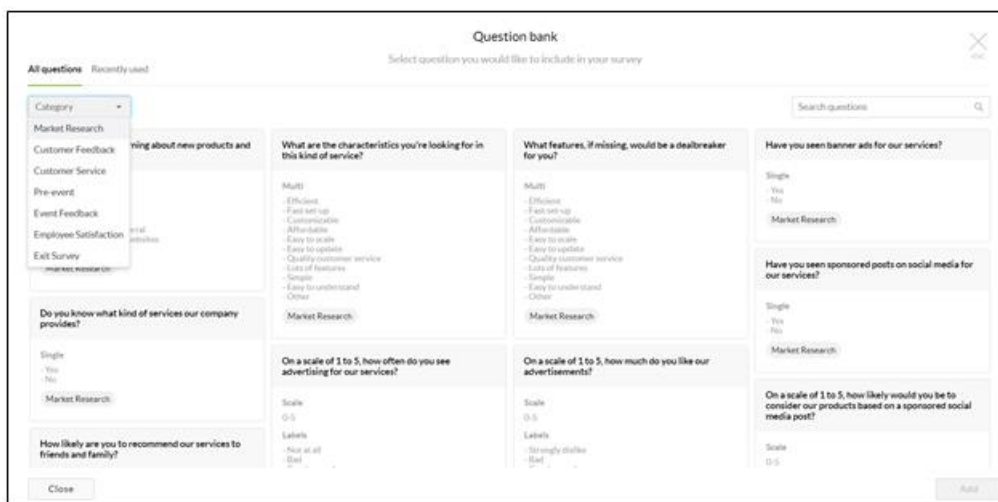
Landing Page Designer

5. Create survey questions from scratch or choose predefined questions from the Question Bank. Expand **Survey** in the sidebar to access the Survey elements and Question Bank.

NOTE: Add questions from the **Question Bank** by selecting the desired questions and clicking **Add**. Filter the questions by **Category** or use the **Search** box to locate specific survey questions. After adding the questions, modify as needed.



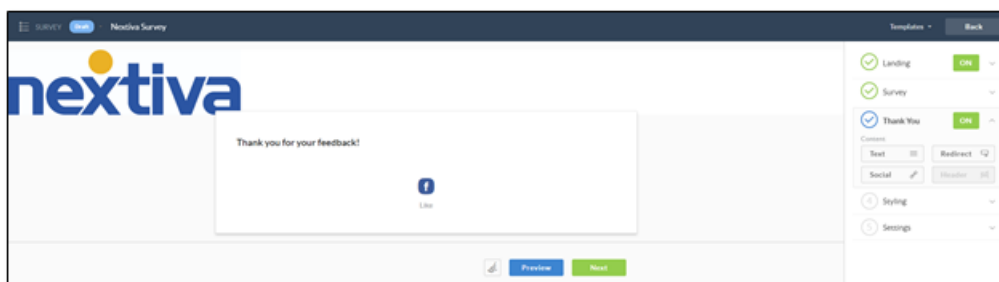
Survey Questions



Question Bank

6. Customize the **Submit** and **Back** buttons.
7. Design the **Thank You** page. Expand **Thank You** in the sidebar to access the Thank You elements. Add and customize any of the Thank You elements from the sidebar, including the options to automatically redirect the survey taker to a specific website or link to social media.

NOTE: Turn the **Thank You** page **ON** or **OFF** by clicking the **ON/OFF** button. By default, it is turned on.

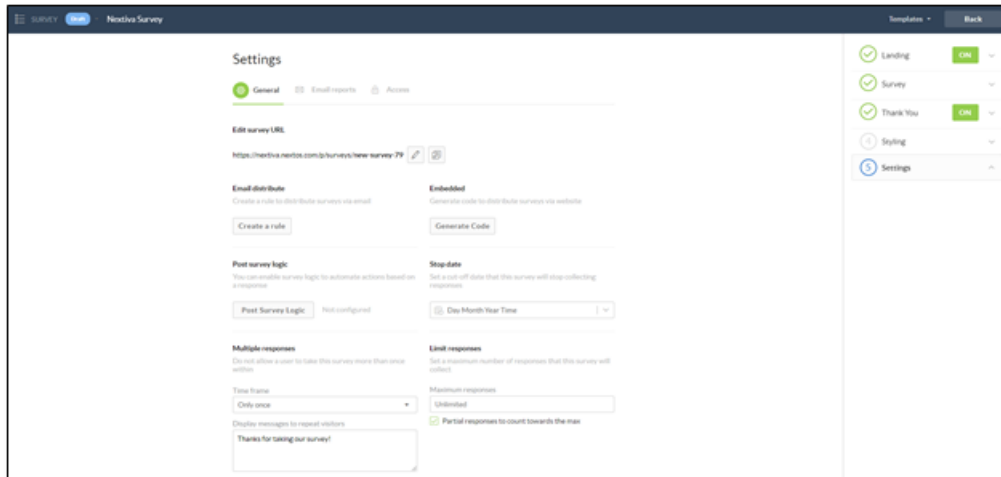


Thank You Page Designer

7. Set the survey **Styling** to apply a consistent look for all parts of the survey. Expand **Styling** in the sidebar and configure the style settings on the **Custom** tab.
8. Expand **Settings** in the sidebar to configure the settings accessible from the sidebar.

General Tab

- **Edit survey URL:** Edit and copy the survey's link.
- **Email distribute:** Create a rule to distribute the survey via email.
- **Embedded:** Generate and copy the code to embed the survey on a web page. If desired, specify the embedded frame size and border style of the survey.
- **Post survey logic:** Enable survey logic to automate actions based on responses. Select survey questions and specify the trigger and action. Actions add points to or deduct points from the customer score.
- **Stop date:** Set a cut-off date and time for when the survey will stop collecting responses.
- **Multiple responses:** Specify the frequency that users can take the survey (**Only once/ Not more than once a day/ Not more than once a week/ or Unlimited**). Add a message to display for repeat visitors.
- **Limit responses:** Set the maximum number of responses the survey will collect (**Unlimited** is the default). Specify whether **Partial responses will count towards the max** (checked by default).
- **Show Back button:** By default, a Back button displays throughout the survey. Click the toggle switch to hide the Back button (toggle switch turns gray).
- **Display question numbers:** By default, survey questions are numbered. Click the toggle switch to hide the numbering (toggle switch turns gray).



Survey Settings

Email Reports Tab

- **Email updates frequency:** Select the frequency for receiving email updates with survey results.

Access Tab

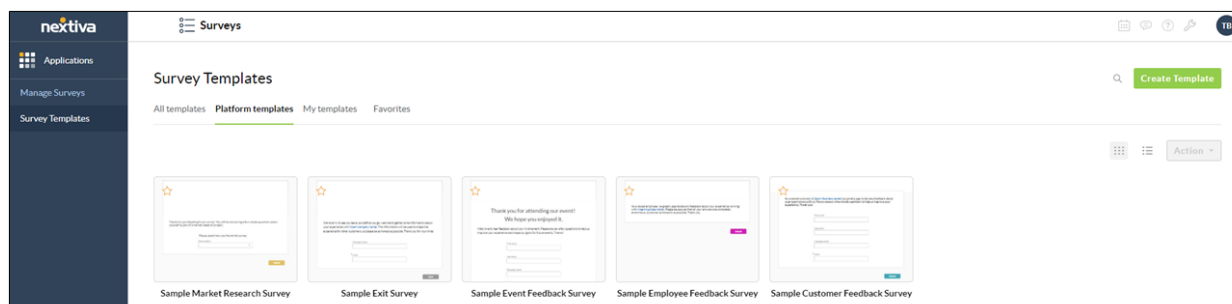
- **IP address access:** Allow or Block specific IP addresses, enter the IP address(es). Add a message for blocked visitors.
- **ReCaptcha:** Click the toggle switch to turn ON (green) or OFF (grey) to protect the survey with a captcha.

Survey Templates

Instead of creating surveys from scratch, use Survey Templates as a basis for creating new surveys and add customization easily.

Using Survey Templates

1. In Nextiva Surveys, click **Survey Templates** on the left panel to view all Templates. **Platform templates** are default templates that Users can modify to best fit their survey needs.

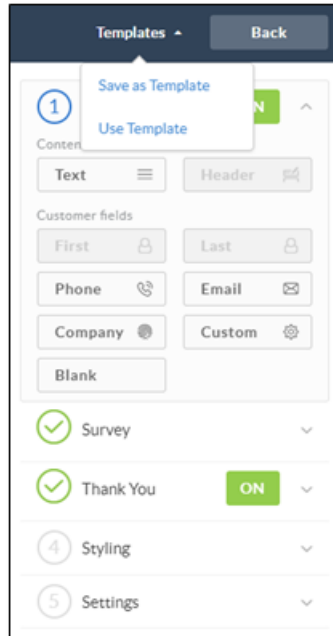


Platform Templates

2. Hover over any template. Click **Use** to customize a Template.
3. Rename the survey and make any desired changes. For information on designing the survey, see [Creating Surveys](#).

Creating New Survey Templates

From the Survey Template options, click **Create Template**. Users can also add to the available templates when creating a new survey or when editing an existing survey. Click **Templates** at the top of the screen. Select **Save as Template**.



Save as Template

Managing Surveys

On the **Manage Surveys** view, Users can see all surveys, total responses, current status, when surveys were created, and when surveys were last modified and by whom. Each column can be arranged or filtered, and there is a search option at the top.

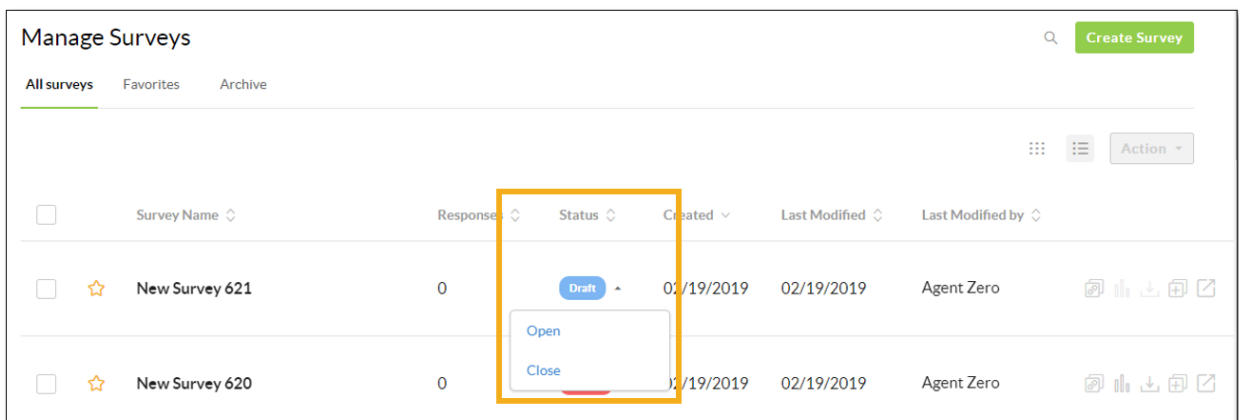
In addition to creating surveys, users can perform the following actions from the **Manage Surveys** view:

- [Change Survey Status](#)
- [Copy Survey links](#)
- [View Survey Analytics](#)
- [Download Survey results](#)
- [Copy Surveys](#)
- [Preview Surveys](#)
- [Copy Surveys](#)
- [Modify Surveys](#)
- [Archive Surveys](#)
- [Delete Surveys](#)

Changing Survey Status

In the **Status** column of the **Manage Surveys** view, select a status from the drop-down list. If the current status is:

- **Open:** the available options are **Pause** and **Close**.
- **Draft:** the available options are **Open** and **Close**.
- **Closed:** there is no option to change the status.

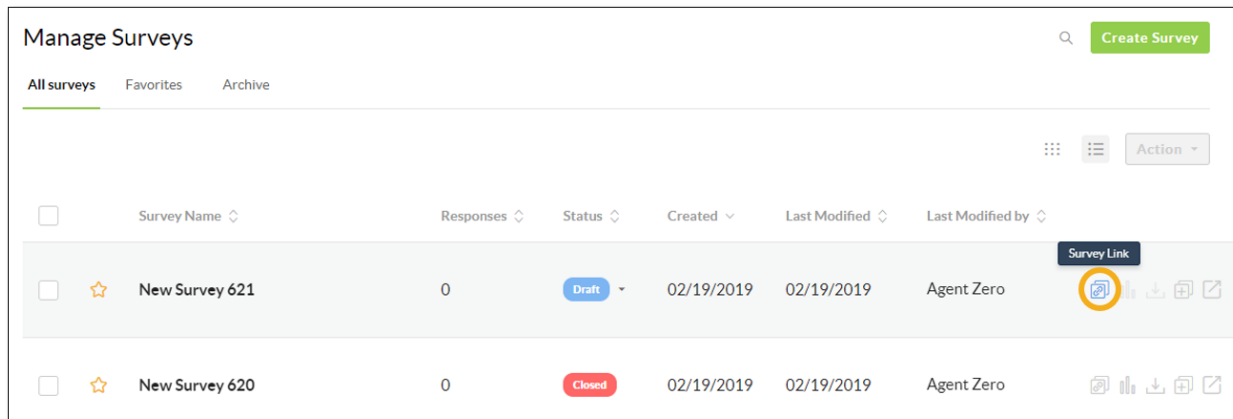


| Survey Name | Responses | Status | Created | Last Modified | Last Modified by |
|----------------|-----------|--------|------------|---------------|------------------|
| New Survey 621 | 0 | Draft | 02/19/2019 | 02/19/2019 | Agent Zero |
| New Survey 620 | 0 | | 02/19/2019 | 02/19/2019 | Agent Zero |

Status Drop-down List

Copying Survey Links

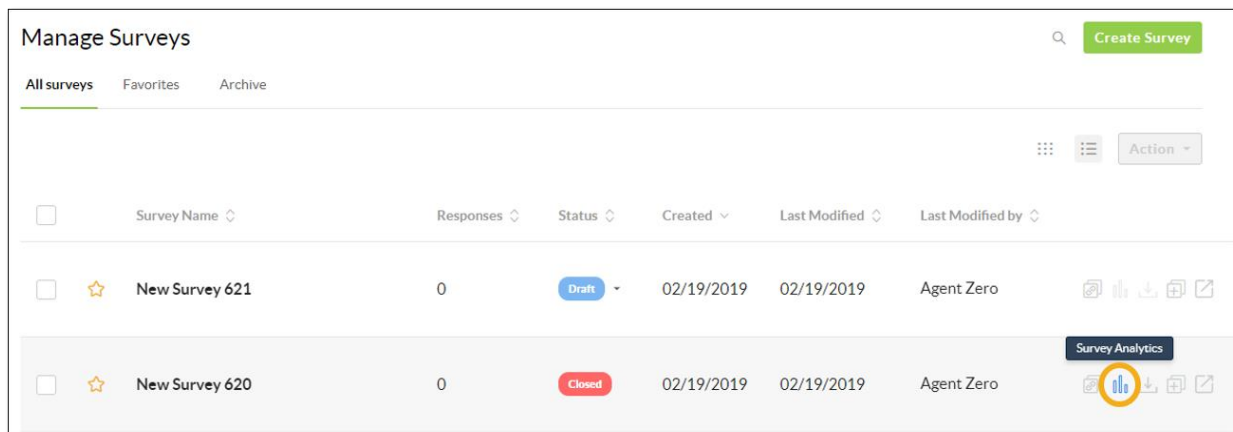
In the **Manage Surveys** view of Nextiva Surveys, locate the desired survey, and click the corresponding **Survey Link** icon to copy the survey share link to your clipboard.



Survey Link Icon

Viewing Survey Analytics

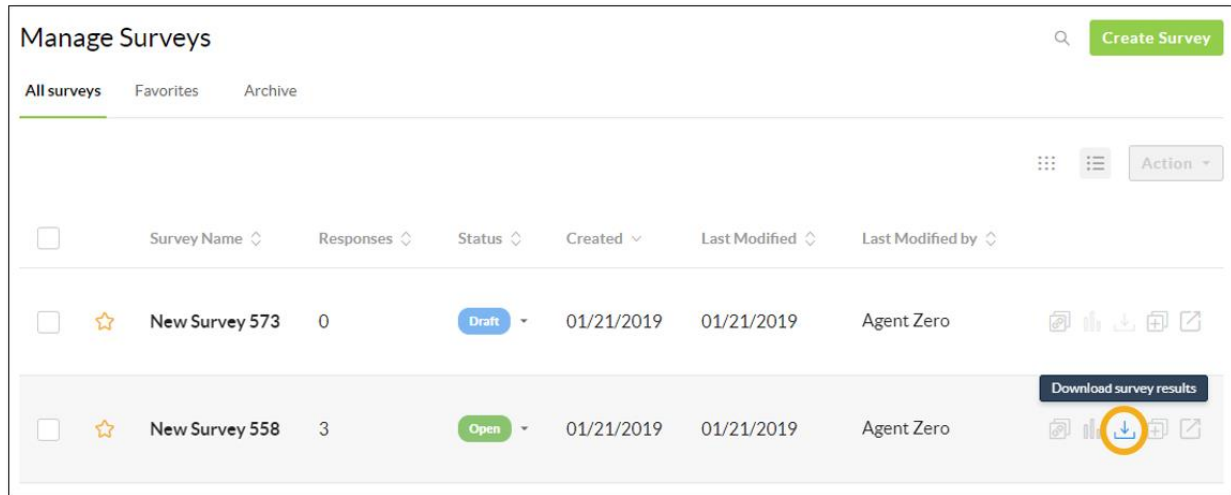
In the **Manage Surveys** view of Nextiva Surveys, locate the desired survey, and click the corresponding **Survey Analytics** icon. A new browser tab opens to display the analytics data for the survey.



Survey Analytics Icon

Downloading Survey Results

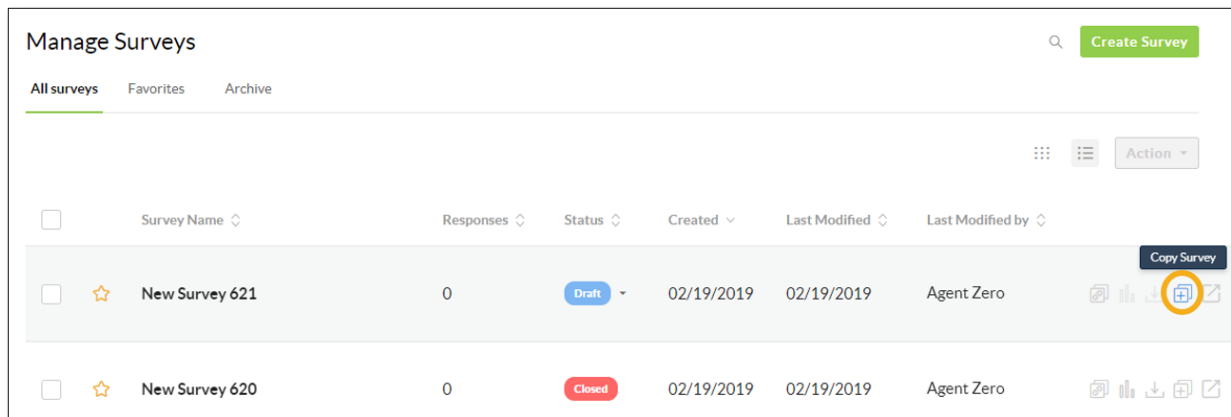
In the **Manage Surveys** view of Nextiva Surveys, locate the desired survey, and click the corresponding **Download survey results** icon to download a survey report as a CSV file.



Download Survey Results Icon

Copying Surveys

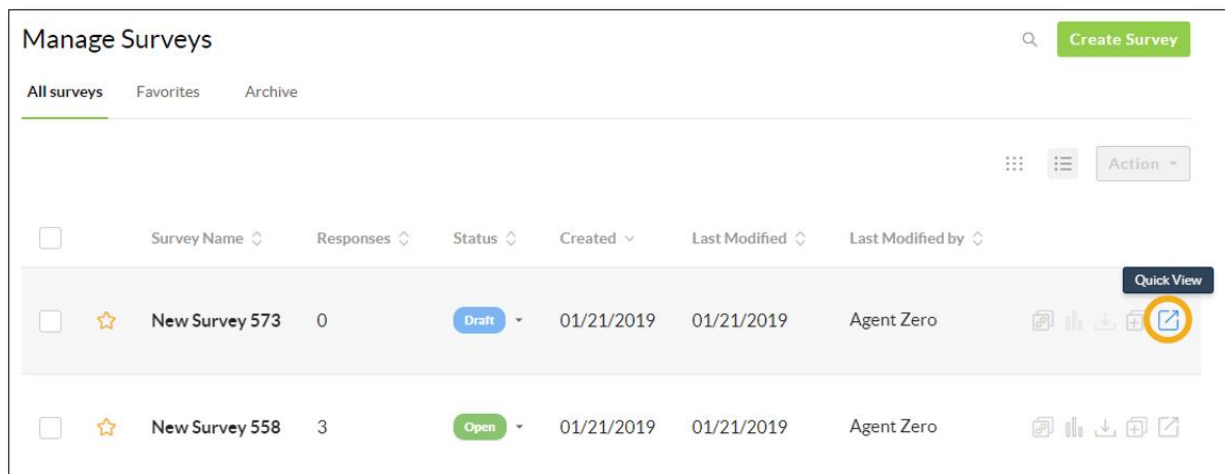
Save time by copying an existing survey to a duplicate survey. In the **Manage Surveys** view, locate the desired survey and click the corresponding **Copy Survey** icon. [Modify the survey](#) as needed.



Copy Survey Icon

Previewing Surveys

In the **Manage Surveys** view, locate the desired survey and click the corresponding **Quick View** icon to preview the survey.



Quick View Icon

Modifying Surveys

1. In the **Manage Surveys** view, click the desired survey.
2. From the sidebar, select a component of the survey to modify (**Landing, Survey, Thank You, Styling, or Settings**).
3. Hover over a survey element (e.g., text block) and select any of the following options from the **Edit** menu:
 - **Edit** (pencil icon): Edit text and User interface elements.
 - **Duplicate** (double square with plus icon): Creates and adds a replica of the element. This option is only available for Text, Custom, and Blank survey elements.
 - **Move** (up or down arrow icons): Move the position of the element up or down.
 - **Delete** (trash can icon): Remove the entire element.

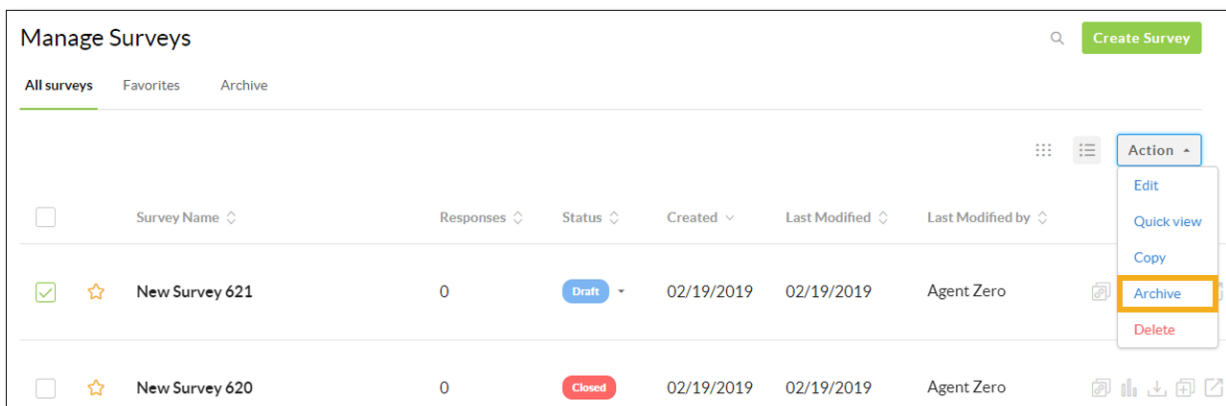


Edit Menu

Archiving Surveys

Archive surveys and stay organized by moving them from the **All surveys** tab to the **Archive** tab. All Archived Surveys can be accessed and modified.

1. In the **Manage Surveys** view, select the checkbox of the desired survey.
2. Click the **Action** button > **Archive**.



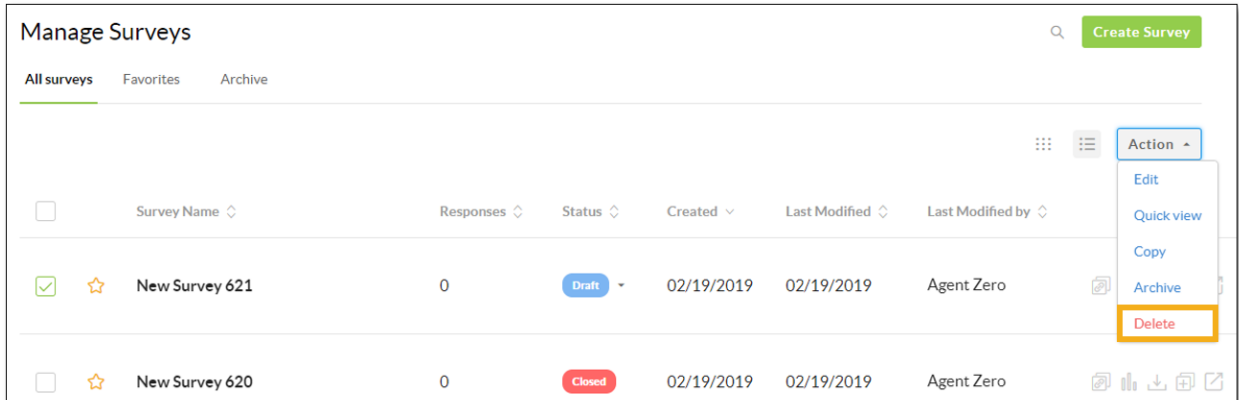
Archive Option

Unarchiving Surveys

1. In the **Manage Surveys** view, click the **Archive** tab.
2. Select the checkbox of the desired survey.
3. Click the **Action** button > **Unarchive**.

Deleting Surveys

1. In the **Manage Surveys** view, select the checkbox of the desired survey.
2. Click the **Action** button, then select **Delete**.
3. Click **Delete**.



The screenshot shows the 'Manage Surveys' interface. At the top right, there is a search icon and a 'Create Survey' button. Below the title, there are tabs for 'All surveys', 'Favorites', and 'Archive'. The main content is a table with columns: Survey Name, Responses, Status, Created, Last Modified, and Last Modified by. Two surveys are listed: 'New Survey 621' (Draft) and 'New Survey 620' (Closed). The 'New Survey 621' row is selected, and an 'Action' menu is open over it, showing options: Edit, Quick view, Copy, Archive, and Delete (highlighted in orange).

| <input type="checkbox"/> | Survey Name | Responses | Status | Created | Last Modified | Last Modified by | |
|-------------------------------------|---|-----------|--------|------------|---------------|------------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> New Survey 621 | 0 | Draft | 02/19/2019 | 02/19/2019 | Agent Zero | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> New Survey 620 | 0 | Closed | 02/19/2019 | 02/19/2019 | Agent Zero | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

Delete Option