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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.

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.
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.

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.
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**/ **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.

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](image)
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.
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.

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.
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.

Copy Survey 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.
Previewing Surveys

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

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.
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.

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.