Nextiva Surveys

VERSION 3.1

Table of Contents

Product Summary

Use Nextiva Surveys in many ways to make more informed decisions across your entire business. Collect customer and employee feedback to learn how to retain and engage them better. Automatically send Surveys after a particular action has been performed or after a specified timeframe.

This document covers the following topics:

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

Logging In

1. Visit www.nextiva.com, and click **Client Login** to log in to NextOS.
2. From the NextOS Home Page, select **Surveys**.
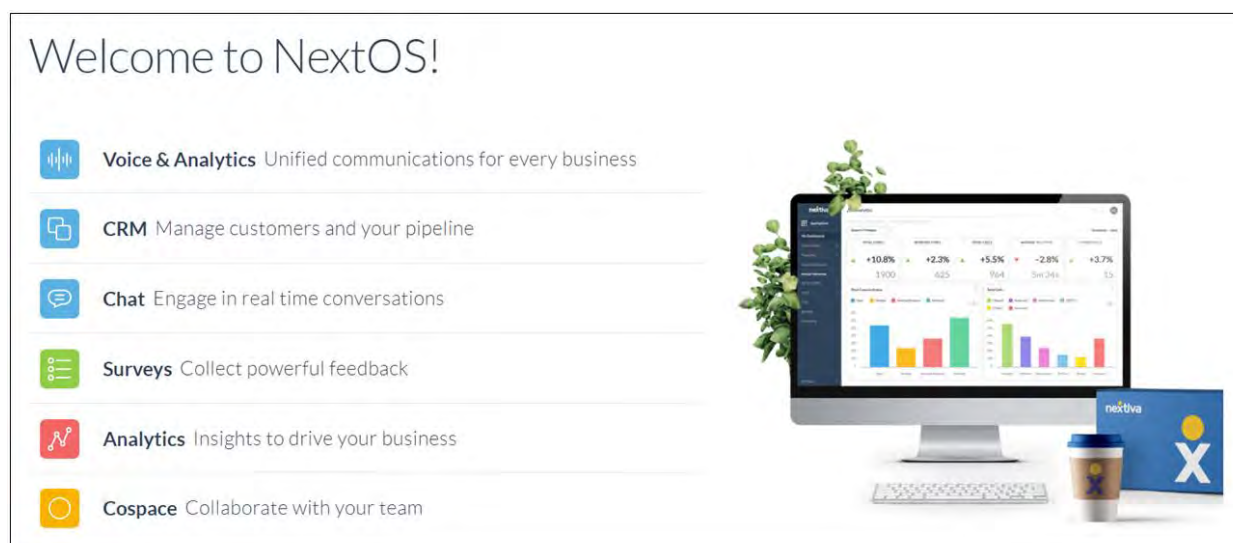
NextOS Home Page

Creating Surveys

With Nextiva Surveys, you can create Surveys to gather data to understand your audience better. You can design short or long Surveys, use a variety of question types, and easily customize the Survey experience with your company's branding.

1. From the **Manage Surveys** window > **Create Survey** > **From Scratch** > Enter a name for the Survey.
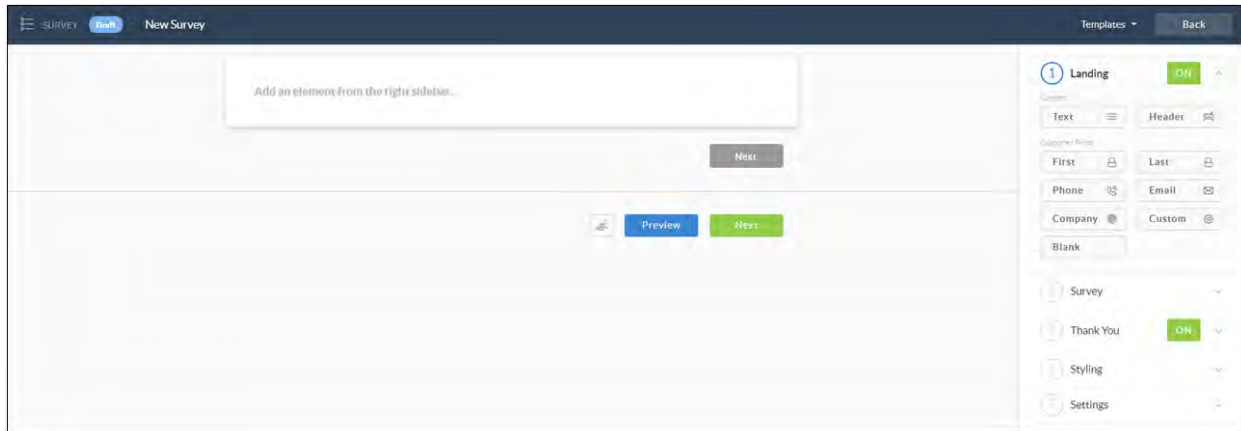
Survey Editor

2. 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, then click the green **Next** button.

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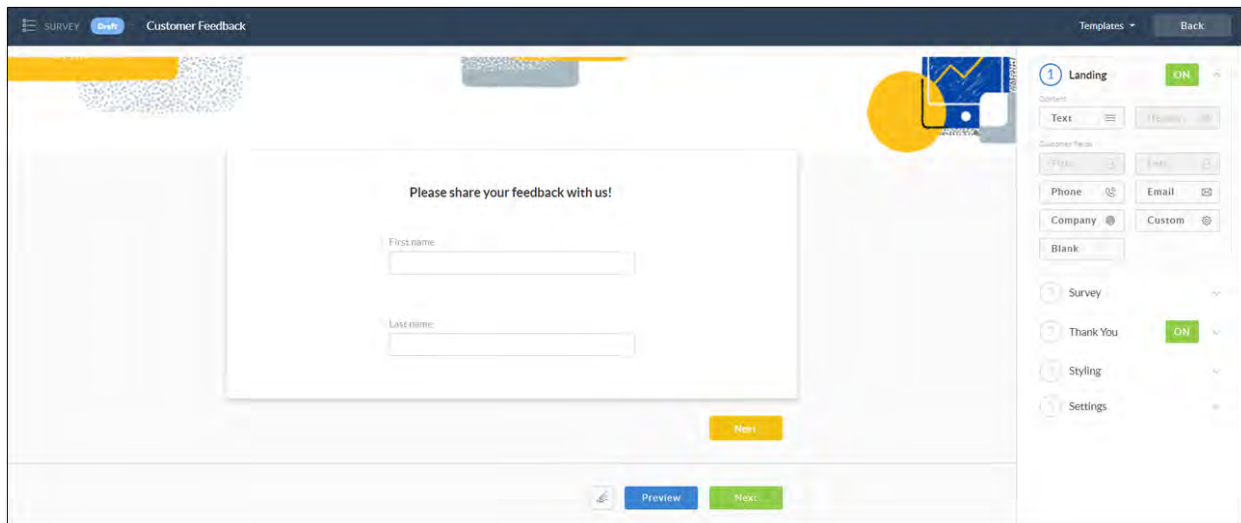
Landing Page Designer

3. Create Survey questions from scratch, or choose predefined questions from the Questions sidebar.

> **NOTE:** Add predefined 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, edit as needed.


Survey Questions

6. Customize the **Submit** and **Back** buttons. Click the green **Next** button.

7. Design the **Thank You** page. 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.
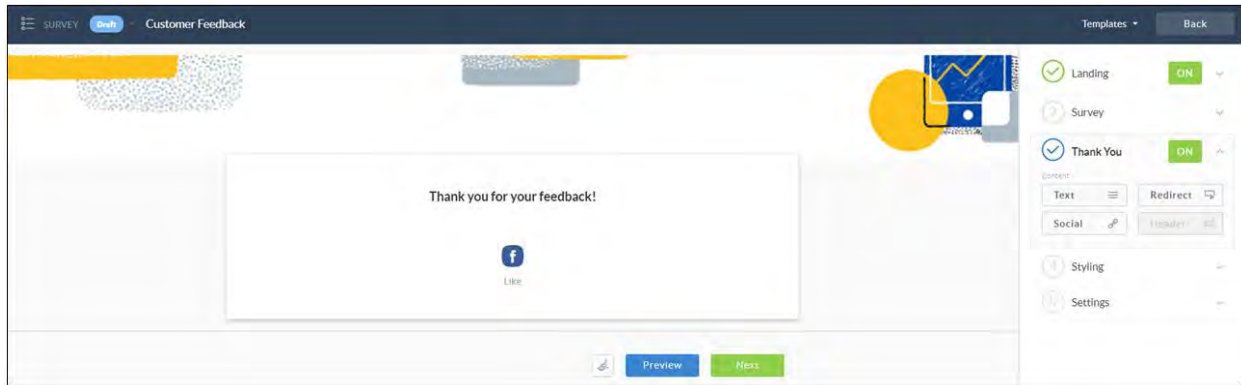

Thank You Page Designer

8. 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.

9. 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 Experience 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).
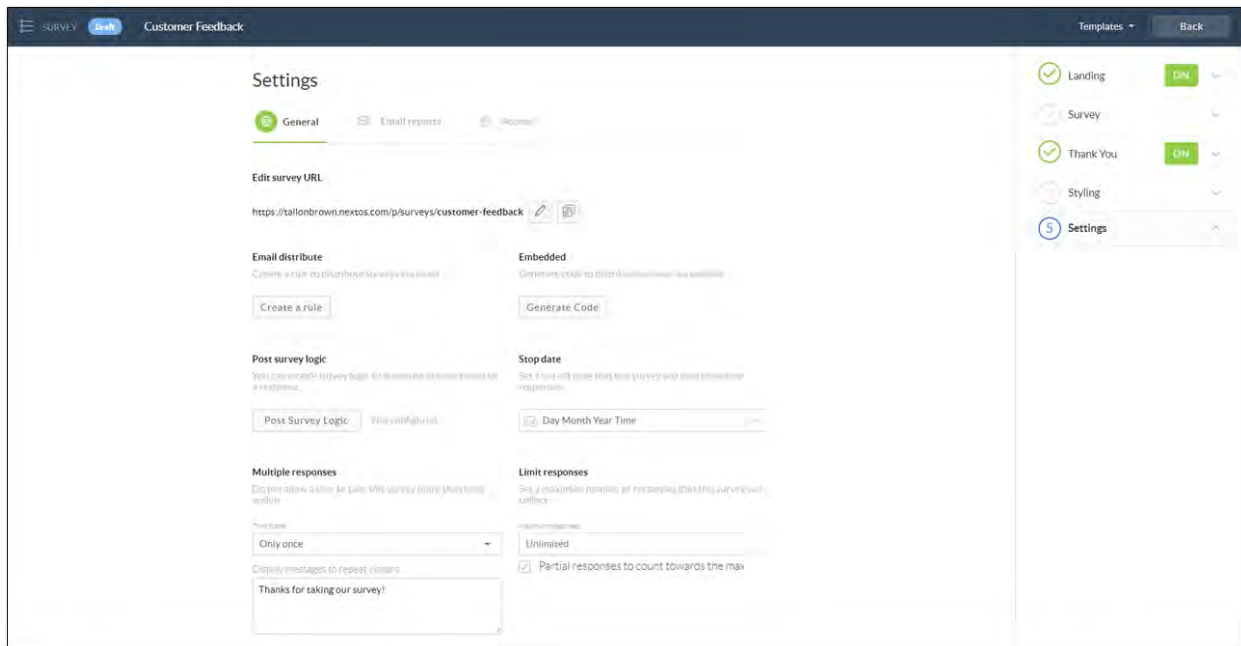
Survey Settings

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 easily add customization.

Using Survey Templates

1. In Nextiva Surveys, click **Survey Templates** on the left panel to view all Templates. **Platform templates** are default templates you can customize to best fit the Survey needs.
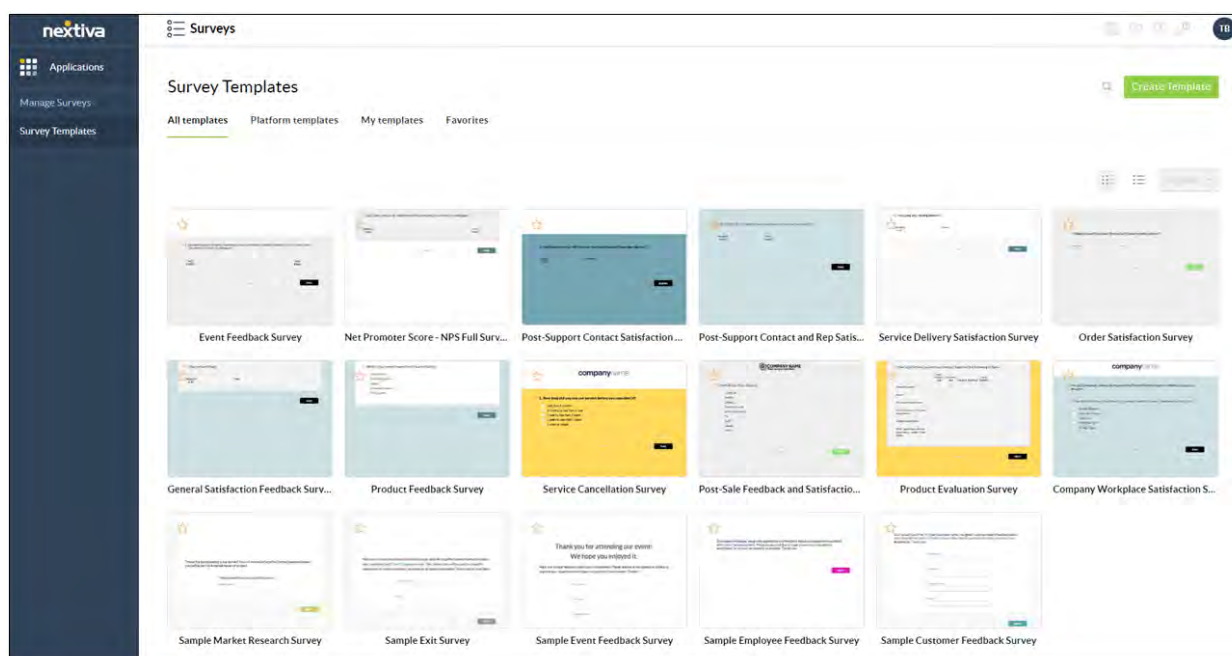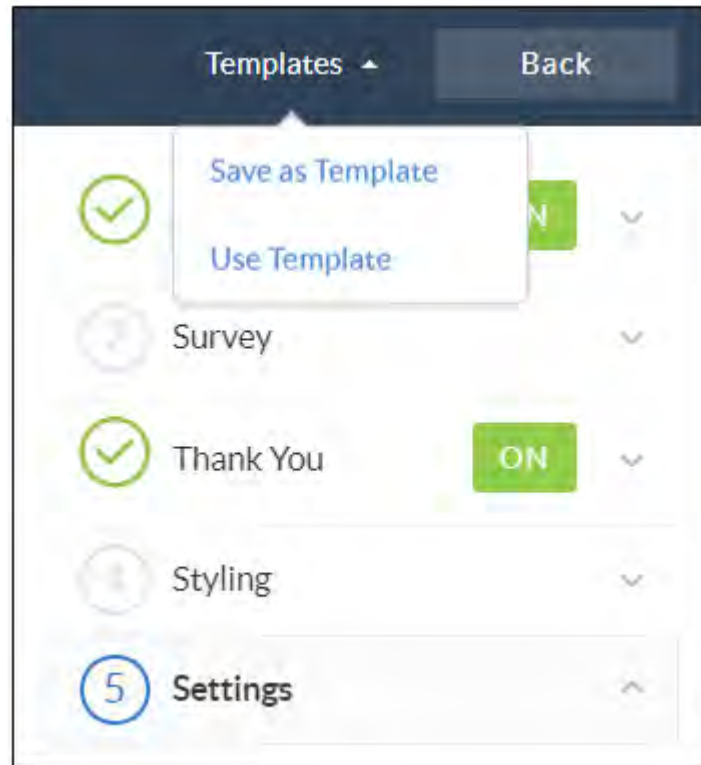

Templates

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**. You can also add templates when creating a new Survey or when editing an existing Survey by clicking **Templates** at the top of the screen and selecting **Save as Template**.

Save as Template

Managing Surveys

On the **Manage Surveys** view, you can see all Surveys, total responses, current status, and when Surveys were created or 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, you can also 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
- Editing 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. the current status is:
- **Open**: the available options are **Pause** and **Close**. The status must be Open in order to take the Survey.
- **Draft**: the available options are **Open** and **Close**. You can only edit the survey when the status is set to Draft.
- **Closed**: there is no option to change the status. Once a Survey is Closed, it cannot be reopened
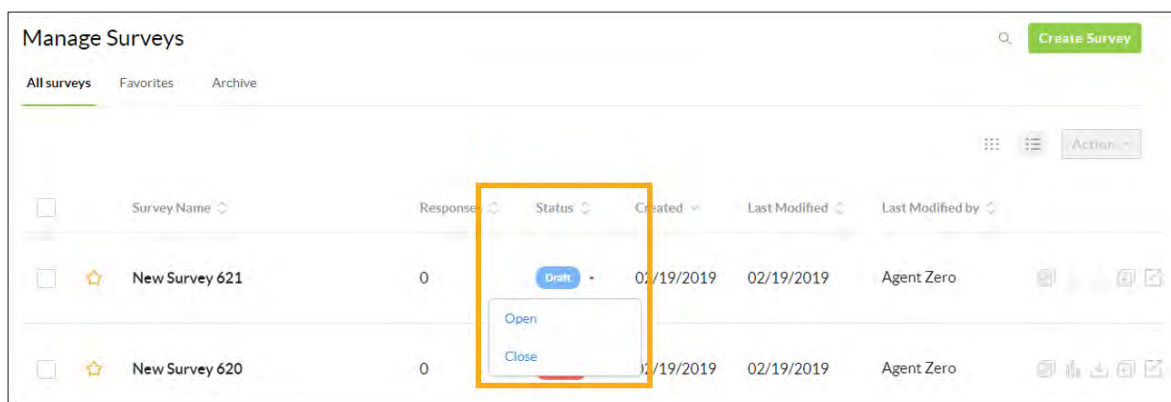
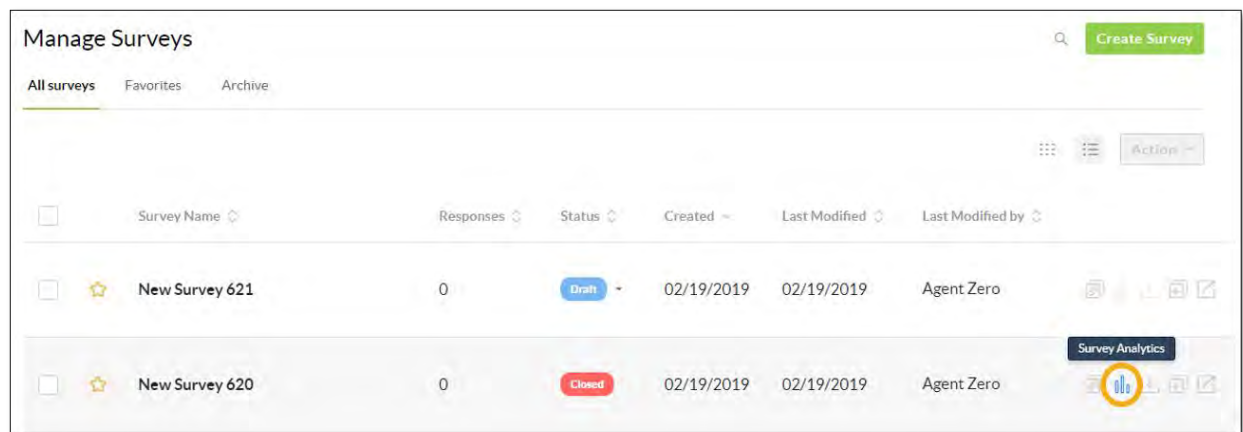*Status Drop-down List*

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.
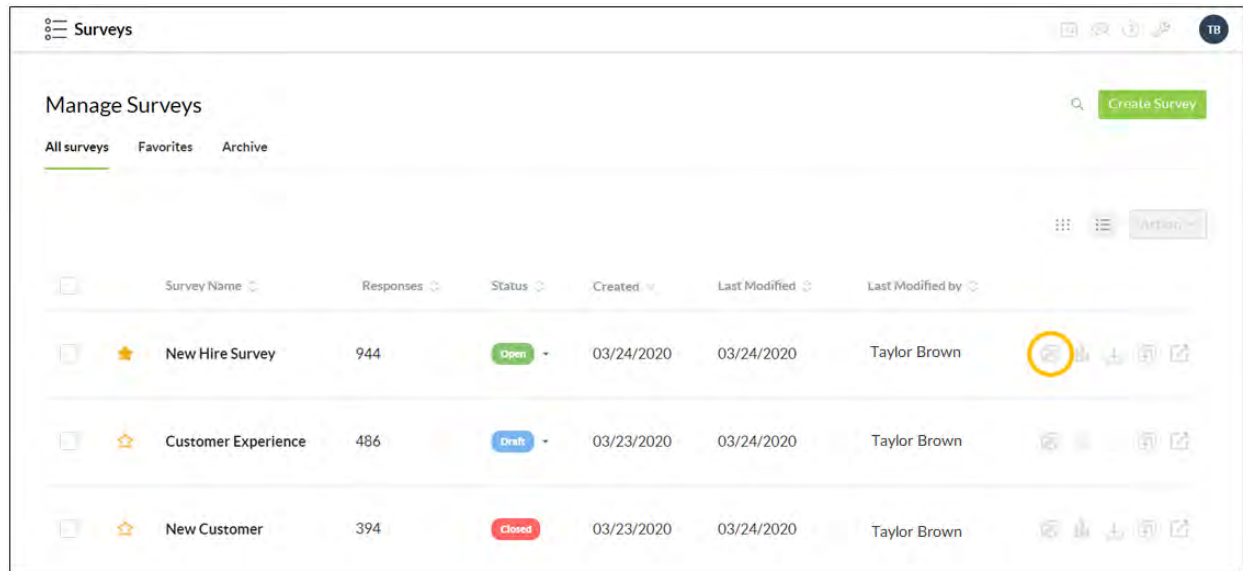


Survey Link Icon

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.
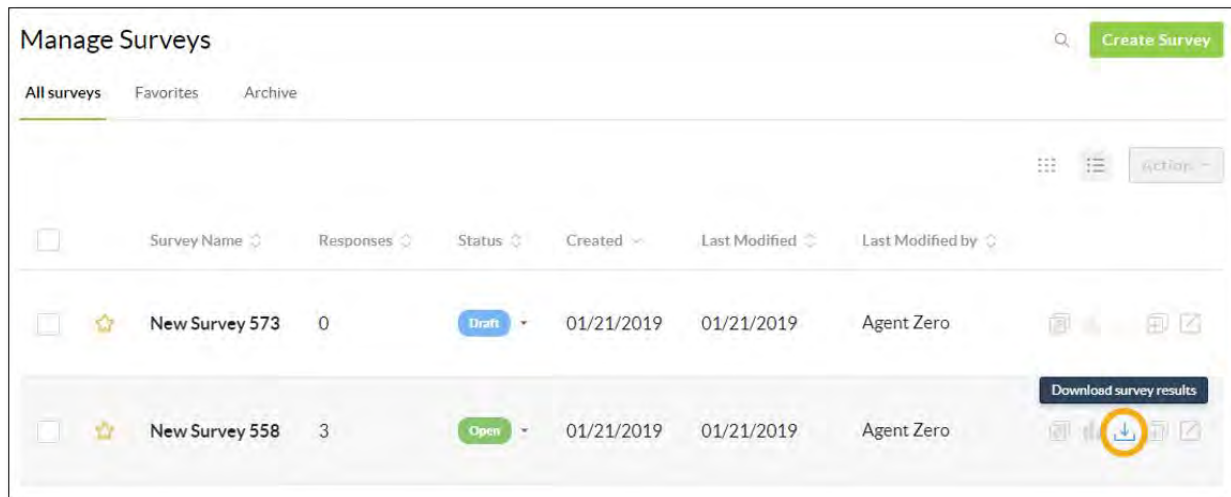
Download Survey Results Icon
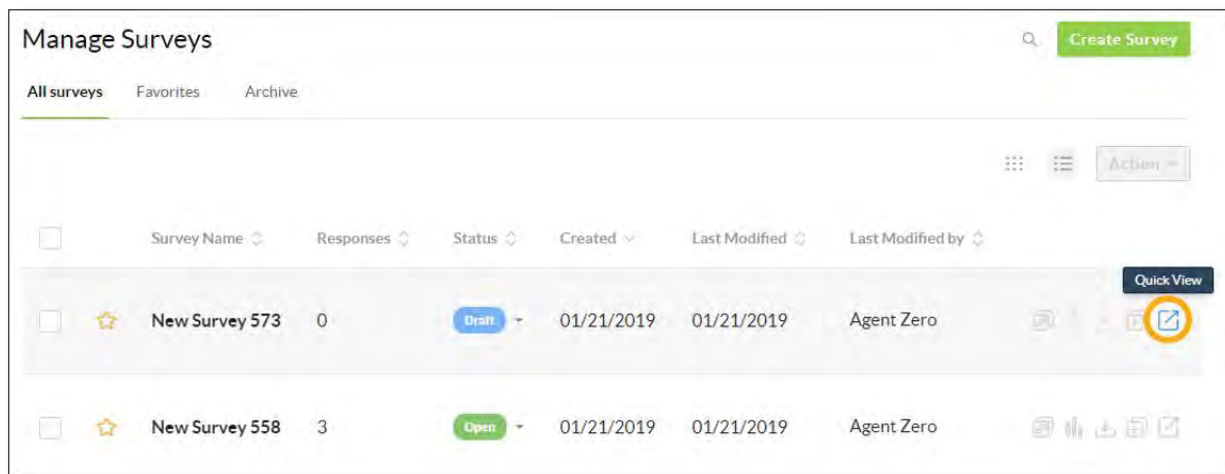
Copying Surveys

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. Edit the Survey as needed.
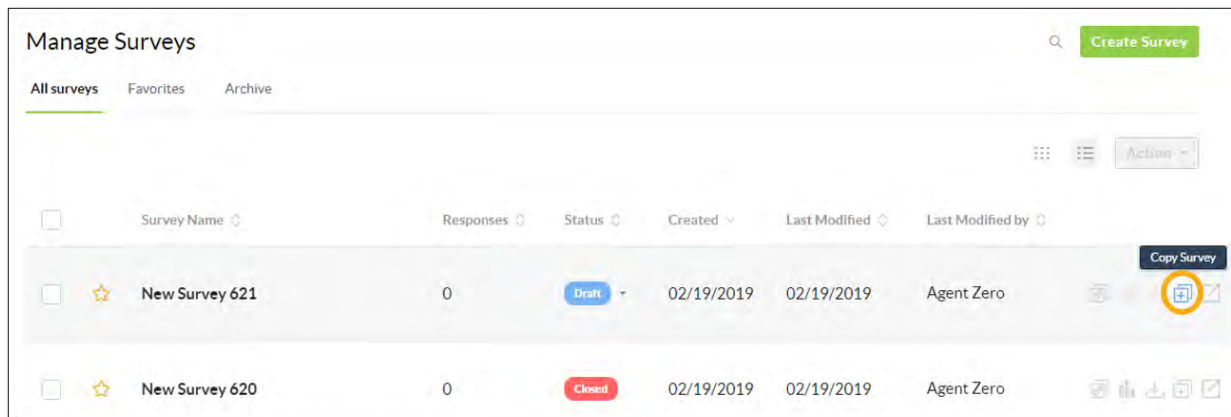
Copy Survey Icon

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

Editing Surveys

1. In the **Manage Surveys** view, click the desired Survey.
2. From the sidebar, select a component of the Survey to edit (**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.
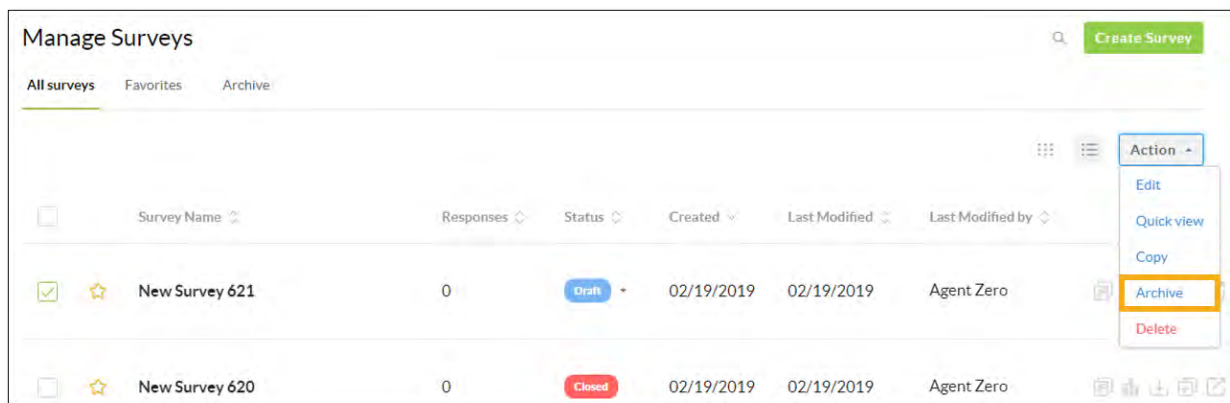   - **Delete** (trash can icon): Remove the entire element.

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.
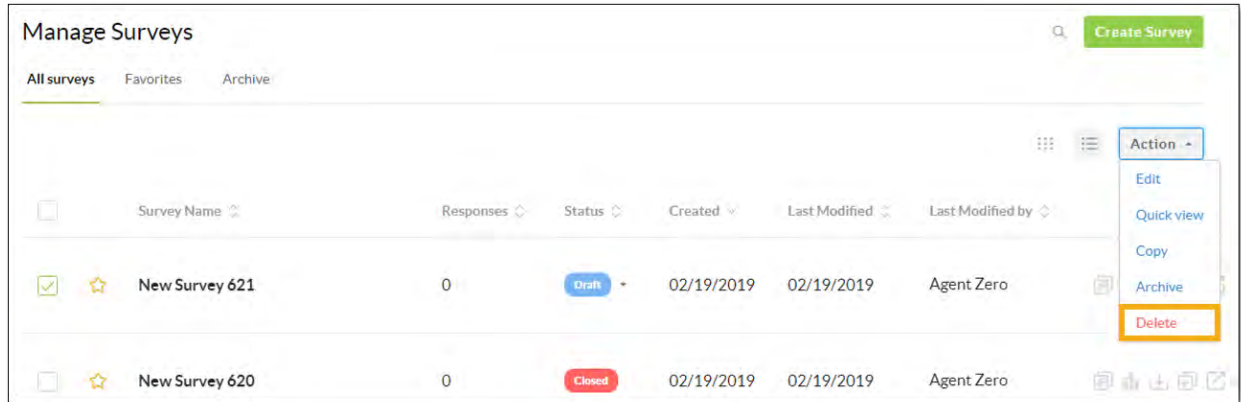2. Click the **Action** button > **Archive**.

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**.

Delete Option

Automatically Send Surveys

Automatically send Surveys by creating a rule in Nextiva CRM. Only Administrators with a license for Rules and Automation can create rules.

1. Under **Workflow Builder**, on the **Build** page, click the **Plus (+)** icon > **Action** > **Send Survey**.
2. From the **Type** drop-down list, select **Link to survey in email**.
3. Select the desired Survey from the **Survey** drop-down list.
4. From the **To** drop-down list, select the field(s) containing the desired email address.
5. In the **From** field:
   a. Enter the username, such as *info*, before the @ symbol. Otherwise, the username will display as *no-reply*.
   b. Select a verified domain from the drop-down list
      -OR-
      Click **Verify a new domain** to set up a custom email domain.
6. Enter a subject for the email in the **Subject** text box.
      NOTE: Use the {} icon to add contextual information to the email subject or body of the email by selecting entities and field values that are related to the entity

7. In the **Body** edit box, compose the email message. Format the text, add links, and attach files.
8. Design the **Survey Button** that will appear in the body of the email message.
9. Click **Save & Close**.

Send Survey Option