

Surveys

The **Surveys** module allows you to create a web-based survey with a variety of question-type options. The responses received are stored in **KiyoCRM** and can be viewed on a per-respondent basis or as a detailed summary report using charts where appropriate.

Surveys can be sent as part of a Campaign.

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Create Survey

To create a new survey, select **Create Survey** from the sidebar or the dropdown menu in the **Surveys** module.

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Name: Enter the title of the survey to be displayed to users.

Status:

- **Draft:** Survey in preparation, not yet ready to publish and seek responses.
- **Public:** Once ready, setting the survey status to **Public** will generate a URL link for the survey. The survey can be viewed and completed and any responses submitted will be recorded. Note that once responses have been received, the survey questions cannot be edited.
- **Closed:** A **Closed** survey will not accept any further responses. Users navigating to the survey link will see a message informing them that the survey is now closed.

Description: Note that this description is internal only - it will not be displayed to users as part of the survey.

Add Questions

Click **New Question** to add a question to the survey.

Enter the question text and select the question type from the dropdown list.

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The available question types are as follows:

Text	A standard text input
Textbox	A larger text input area
Checkbox	Displays a single checkbox alongside the question.
Radio	Specify a number of answer options to choose from, with radio buttons. Only one answer can be selected.
Dropdown	Specify a number of answer options to choose from, in a dropdown list. Only one answer can be selected.
Multiselect	Similar to a dropdown list, but one or more answers can be selected.
Matrix	For each option specified, the user will be able to answer " Satisfied ", " Neither Satisfied nor Dissatisfied " or " Dissatisfied ". These responses can also be customized - see below.
Date Time	A Date/Time picker will be displayed for the user to select a date.
Date	A Date/Time picker will be displayed for the user to select a date and time.
Scale	A 1-10 scale will be displayed. Users can select one number on the scale in response to the question.
Rating	A five-star rating widget will be displayed. Users can select 0 to 5 stars in response to the question.

Radio Button Example

Click on **Add Option** to add answer options to the question.

Remove Unwanted Option by clicking **X** icon.

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Click **New Question** to add more questions.

Further Options

Submit: Edit the text for the survey's Submit button here, if desired.

Customize the responses for **Matrix** type questions by editing the default matrix response text here:

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Click **Save** to Save the Survey.

Detail View

The Detail View for the draft survey will be displayed. This overview shows all the survey questions and question types included in the survey.

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View Survey

Once completed, you can view the survey as it will be shown to participants. Select **Edit** from the **Actions** menu and then set the survey status to **Public**.

Click **Save**.

The Detail View for the survey will be displayed, now showing the URL for the survey.

Click on the URL to view the survey in your browser.

Responses can be submitted by clicking **Submit**.

Users will be redirected to a thank you page and the responses will be recorded. Responses can be viewed in the **Survey Responses** subpanel or the **Survey Report**.

Edit Survey

From **List** view, click the pencil icon beside the survey name to open the survey in **Edit** mode.

From **Detail** view, select **Edit** from the **Actions** menu.

Survey Responses

The Survey Responses subpanel shows the individual responses received from each respondent. The subpanel can be found in Detail View for the survey. The Survey Responses subpanel can also be accessed from the Campaign Status page for a **Campaign**.

Click on a respondent's name to view their responses.

Survey Reports

The survey responses can also be viewed as a Survey Report, showing a summary of all the responses by question. Charts are used where appropriate to display the data.

Individual responses cannot be viewed from the Survey Report. If you wish to view a particular respondent's answers, these can be viewed from the survey's Survey Responses subpanel, as shown above.

Select **View Survey Reports** from the **Actions** menu

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The Survey Report will open showing a summary of all the responses for each question.

As an example, the Survey Report for the Demo Survey above might contain the following summary for question 2:

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Survey Campaign

Surveys can be sent out as part of a campaign which will track and record the survey responses received from each recipient.

From the **Campaigns** module, select **Create Campaign** from the sidebar. Select **Survey** to launch the Survey Campaign Wizard.

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Campaign Header

The survey is attached to the campaign on the Campaign Header tab.

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Click **Select** to select the survey from the popup.

Survey Email Template

Create or edit an existing template for the survey. Survey variables are available from the dropdown list.

You will need to include the **Surveys URL** variable `$surveys_survey_url_display` in your template. This will include a unique link to the survey so that individual responses can be tracked.

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Click **Save** to retain your template settings.

Campaign Status

On the **Campaign Status** page, the **Survey Responses** subpanel can be expanded to view survey responses from individual respondents. Click on a respondent's name to view the responses.

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