Survey Tab – Create Surveys and Web Forms

Whether you need to build your contact list, learn what your contacts like, or who will be attending your next event, the survey tool allows you to both create simple surveys that will gather any type of data you need and integrate that data into your ACT! database.

Surveys are useful for collecting information such as: verifying your contacts' interests, measuring your customers' satisfaction, confirming the information you have in your ACT! database for that contact, or identifying who has registered for your event. Create a new survey with the specific questions you'd like answered, link to it from your E-mail, making sure your fields are mapped to your ACT! database. You're now ready to gather information from your contacts and begin updating your ACT! database.

Update Your List from Existing Contacts

Surveys and web forms are a great way to keep your ACT! database current and full. Simply link from inside an E-mail to a List Updater Survey and ask your customers to fill in the information. This is a great way to automate registration for an event or demo, determine your contacts' preferences or gauge your customers' satisfaction. Consider the endless possibilities with a tool that allows you to ask your contacts specific questions so that you can better cater your sales and marketing efforts to their needs. **List Updater** survey type can be used to update existing contacts in your ACT! database. Choose this option when creating your survey if you wish to send this survey to your existing ACT! contacts via your E-mail blast. See below for more details.

Grow Your List to Gain Contacts

Consider a survey or web form that is placed on your website for visitors to voluntarily fill out. Once the survey is completed and the user presses Submit, the data is taken into ACT! and a new contact is created. These List Builder surveys help you gather new, interested contacts to keep your database growing. This is an easy way to gain truly interested contacts without any effort from you. **List Builder** survey type can be used to Add New Contacts to your database. Choose this option when creating your survey if you wish to place the survey on your website to acquire new leads. See below for more details.

Tell Me Everything

Be sure to determine what you want to know from your contact, so you know what to ask in your survey. Be sure to consider what you plan to do with this information, and it will be all the more valuable to you. Then, once your data is collected, you know how the sales and marketing teams can make use of it.

Advanced Tip

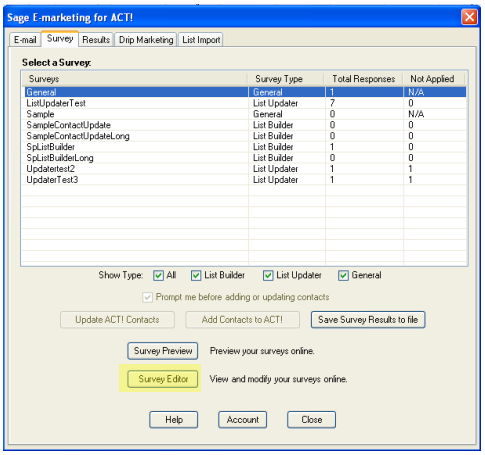
Think about data you want to update in your database as well as new data you want to obtain from your existing contacts

Now Do It! - Create a Survey

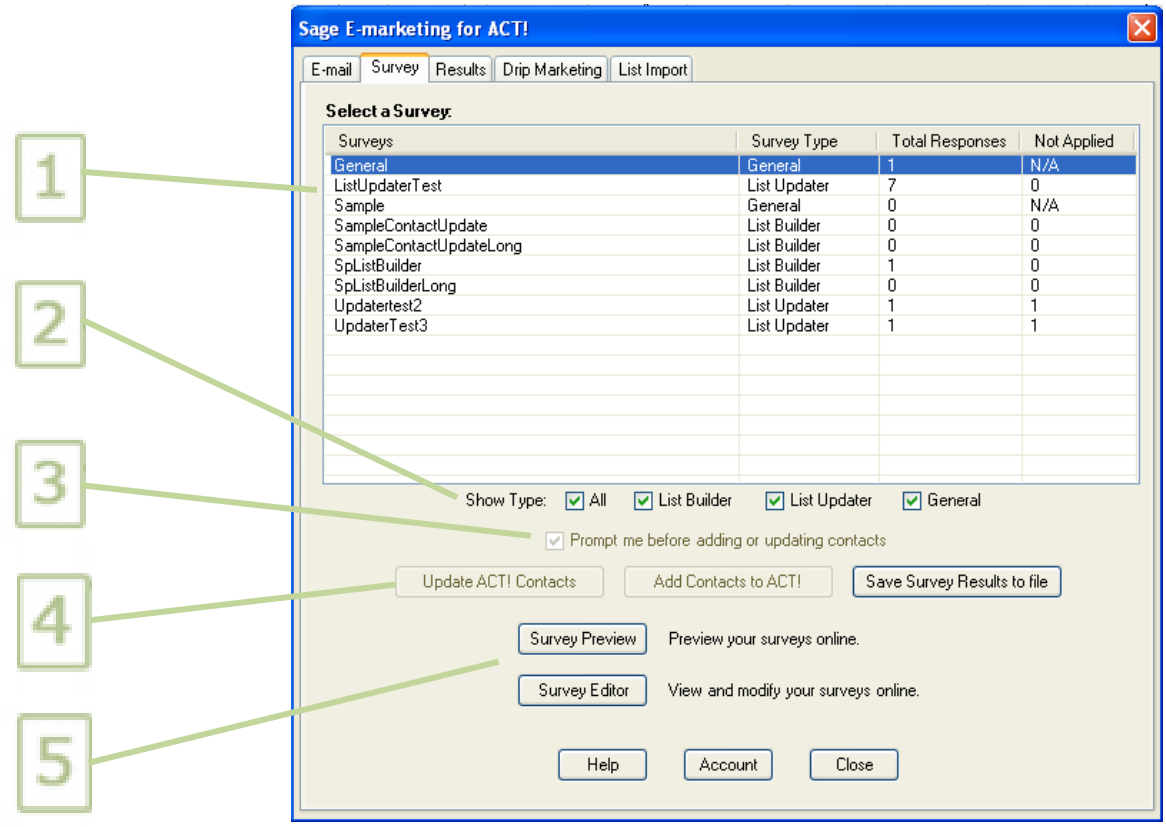
1. Go back to ACT!
2. Click on the Sage E-marketing for ACT! icon on your toolbar
3. Click the **Survey** tab
4. Click **Survey Editor**
5. Follow the online instructions and your set!

Now Do It! - Get Survey Results

1. Go back to ACT!
2. Click on the Sage E-marketing for ACT! icon on your toolbar
3. Click the **Survey** tab
4. Select **Survey**
5. Click **Update ACT! Contacts**, **Add Contacts to ACT!**, Or **Save Survey Results to file**



The following picture shows the Sage E-marketing for ACT!, numbered with corresponding explanations.



1. **Surveys** – The list contains all surveys created by this user. Select a survey to download the results into ACT! or to your computer desktop.

   Survey Type – There are three types of surveys: General, List Builder, and List Updater. Surveys types are chosen online in the “Survey Result Options” area.

   List Builder Type – This survey type can be used to Add New Contacts to your database. Choose this option when creating your survey if you wish to place the survey on your website to acquire new leads.

   List Updater Type – This survey type can be used to update existing contacts in your ACT! database. Choose this option when creating your survey if you wish to send this survey to your existing ACT! contacts via your E-mail blast.

   Total – Shows you the total number of survey responses

   Not Applied – Shows the number of survey responses that have not been downloaded to your ACT! database.

2. Survey views –Check any or all of these boxes to see List Builder, List Updater, General or all survey types.

3. Prompt before adding or updating contacts – selecting this checkbox ensures that you are prompted before each contact is added to or updated in your ACT! database (when applying a List Builder or List Updater survey to your database)

4. Update Contacts, Add Contacts and Save Survey buttons – These buttons will be available based on the type of survey you are viewing. All survey types can be saved to your computer as a .csv file. List Builder surveys can add contacts, and List Updater surveys can update your existing contacts.

5. Survey Preview and Editor buttons – allow you to Preview and Edit surveys online. Click the survey edit button to edit an existing survey or create a new one.