



Quick Start Guide To:

Creating Surveys

This Quick Start Guide provides basic instructions for creating a survey:

1. Log into the Sage E-marketing portal here: <http://www.swiftpage.com/logineditor.htm>
2. Click on the Surveys button.



3. Click on the New button on the left-hand side of the screen.
4. Give your new survey a name. If you wish to copy questions from another survey, select that survey from the "Copy Questions From" dropdown. Then click Submit.

Sage E-marketing Surveys

Home

Survey Management

Survey Design

Survey Result Options

Survey Responses

Edit Response

Survey Management

Current Survey: Test

Survey Name cannot have spaces (example: CompanyPicnic)

New Survey Name:

Copy Questions From:

Back

Submit

To change the design of your survey, select 'Survey Design' from the navigation bar above

5. Click on the Survey Design button at the top of the page.

Survey Design

Current Survey: SampleSurvey

Step 1:	<input type="button" value="Add Questions"/>	Add the questions that you want to ask
Step 2:	<input type="button" value="Edit"/>	Edit the questions, the preferences and the order
Step 3:	<input type="button" value="Title and Instructions"/>	Add a title and any instructions necessary
Step 4:	<input type="button" value="Background Page"/>	A Swiftpage Template can be made the background.
Step 5:	<input type="button" value="Display Settings"/>	Set the font, border etc

Here, you can perform the following functions:

- Add Questions: add questions to your survey;
- Edit: change the order of questions and set other rules for survey questions;
- Title and Instructions: add these to your survey;
- Background Page: (available only with Pro and Team level accounts) set a Background Page for your survey.
- Display Settings: set the color and font of your survey.

6. Click on the Survey Result Options button at the top of the page. Here, you can set up different options for what happens when a survey is filled out:

Survey Result Options

Current Survey: SampleSurvey

Autoresponder - email acknowledgement

Autoresponder - Drip Marketing Autoloader

Database Update

List Builder - This survey will be used to add new contacts to my Database.

List Updater - This survey will be used to update existing contacts in my Database.

Select a Database Type:

Survey Landing Page

Step through each selected option

- Autoresponder – Email Acknowledgement: sends an email to a customer as soon as they fill out the survey. Instructions for the Autoresponder – Email Acknowledgement can be found here.
- Autoresponder – Drip Marketing Autoloader: automatically adds the contact to a Drip Marketing Campaign. Instructions for the Autoresponder – Drip Marketing Autoloader can be found here. (**Note:** only available in conjunction with Sage E-marketing’s Drip Marketing service.)

- ACT! Database Update: the List Builder allows you to add contacts automatically into your ACT! database when a new contact fills out the survey. The List Updater updates existing contacts in your database once the contact fills out the survey.
 - Survey Landing Page: allows you to determine where your contacts go after they fill out the survey. Instructions for setting a Landing page are here.
7. Your survey is finished. Now that your survey is set up, you can put the survey into your template. There are two ways to put a survey in your template. The first is by linking it to text and the second is by linking to an image.
- For linking to text, click on the Home button and then click on the Template Editor button. In the template editor, click on Content Editor > Text Options > Edit Text. Type the words that you want people to click on to be taken to your survey and click Submit. Then click on Content Editor > Text Options > Link to Survey. In the white box on the left-hand side of the screen, type the words exactly as they appear in the window you want linked, then select your survey from the dropdown list and click Submit. Your survey is now linked to the text you entered.
 - To link a survey to an image, click on the Content Editor > Image Options > Add/Replace an Image. Enter the image you desire into your template. Then highlight the window your image is in, click on Content Editor > Image Options > Link to Survey / Web > Link to Survey. Select your Survey from the dropdown list and click Submit. Your survey is now linked to the image you added to your template.
8. You are finished! Your survey is all set up and ready to be sent out within your Sage E-marketing template.