



CLUB CADDIE

a *Jonas* Software Company

Email Marketing Automation Training

Survey Creator

Email Marketing Automation Training

Courses

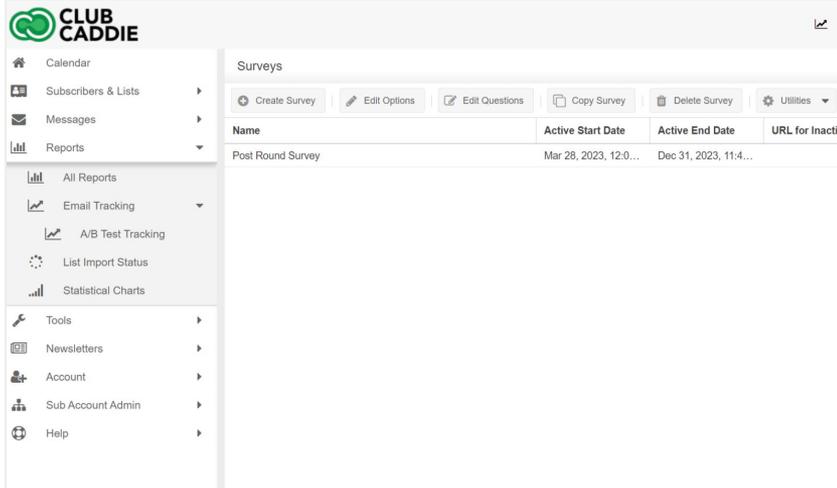
1. Advanced Automation
2. Content Blocks + Dynamic Content
3. Edit Footers
4. Automated Messages
- 5. Survey Creator**
6. Site Visitor Signup Box
7. Template Editor

Survey Creator



Create a Survey

The Survey Creator allows you to create simple surveys or polls and send them to your subscribers. Get results fast with instant response tracking and reporting.

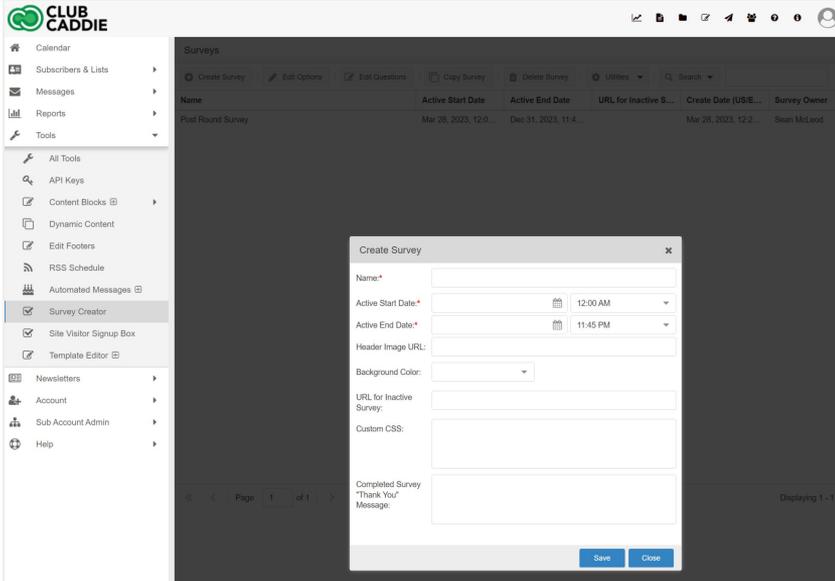


The screenshot shows the CLUB CADDIE Surveys management interface. On the left is a navigation menu with the following items: Calendar, Subscribers & Lists, Messages, Reports, All Reports, Email Tracking, A/B Test Tracking, List Import Status, Statistical Charts, Tools, Newsletters, Account, Sub Account Admin, and Help. The main content area is titled 'Surveys' and contains a toolbar with 'Create Survey', 'Edit Options', 'Edit Questions', 'Copy Survey', 'Delete Survey', and 'Utilities'. Below the toolbar is a table with the following data:

Name	Active Start Date	Active End Date	URL for Inactive
Post Round Survey	Mar 28, 2023, 12:0...	Dec 31, 2023, 11:4...	

Creating a Survey

To create a survey or poll, go to **Tools->Survey Creator** and click **Create Survey**. A window will pop up where you can specify options for the survey. You will need to enter a name for the survey and set the active start/end date and times. You can also specify styling options for the survey in this window. See [Styling](#) for more info.



The screenshot shows the CLUB CADDIE interface. On the left, the 'Tools' menu is expanded, and 'Survey Creator' is selected. The main content area shows a 'Create Survey' dialog box with the following fields:

- Name: *
- Active Start Date: * (Calendar icon, 12:00 AM)
- Active End Date: * (Calendar icon, 11:45 PM)
- Header Image URL:
- Background Color: (Dropdown menu)
- URL for Inactive Survey:
- Custom CSS:
- Completed Survey "Thank You" Message:

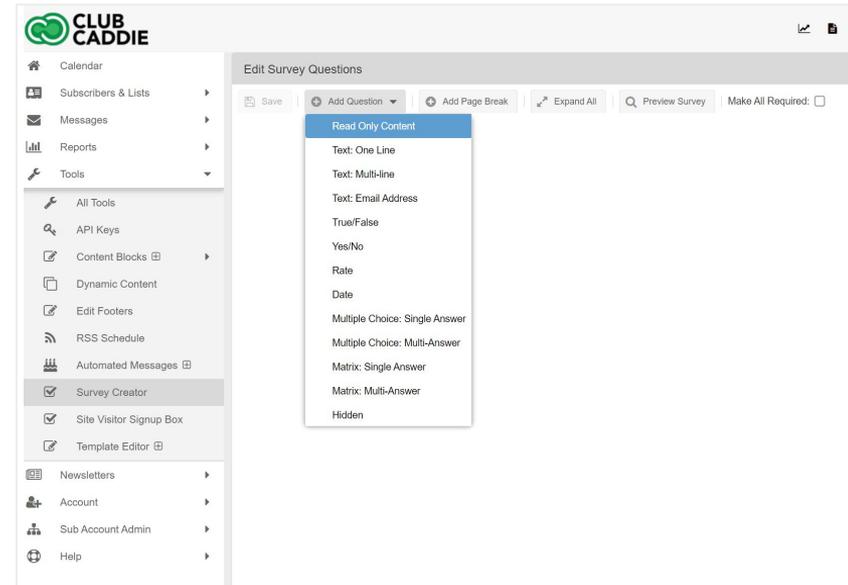
At the bottom of the dialog are 'Save' and 'Close' buttons. In the background, a table of surveys is visible:

Name	Active Start Date	Active End Date	URL for Inactive S...	Create Date (USE...	Survey Owner
Post Round Survey	Mar 28, 2023, 12:00 AM	Dec 31, 2023, 11:45 PM		Mar 28, 2023, 12:20 PM	Sean McLeod

Adding / Editing Questions

To add or edit survey questions, select the survey you want to edit in the grid and click Edit Survey Questions. This will bring you to the Survey Question Editor window which has many powerful tools for customizing your survey.

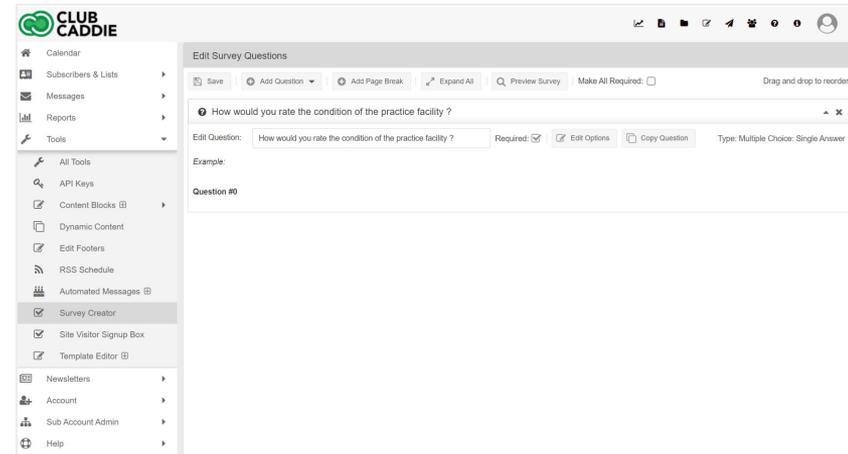
- To add a question, click Add Question and select the [Question Type](#) that you would like to add.
- You can customize the question text that will be displayed using the Edit Question text box (visible when the question is expanded).
- The arrow and X buttons at the far right of the question area will allow you to expand/collapse or remove a question.
- To expand or collapse all questions at once, click the Expand/Collapse All button.
- To make a question mandatory, check the box on the individual question that says Required (visible when the question is expanded) When a question is mandatory, respondents won't be able to continue in the survey or submit their responses until they have answered the question.



Adding / Editing Questions

To add or edit survey questions, select the survey you want to edit in the grid and click Edit Survey Questions. This will bring you to the Survey Question Editor window which has many powerful tools for customizing your survey.

- To make every question in the survey mandatory, check the box that says Make All Required.
- To separate your survey into multiple pages, you can add [Paging](#) to your survey by clicking Add Page Break.
- New questions/page breaks will be added to the bottom of the survey, but you can click and drag the questions to reorder them.
- If you want to see how the survey will look to respondents and test out the logic, click the [Preview Survey](#) button.



Question Types

There are 13 different question types available in the survey editor. The following is a break down of these types of questions and suggested uses for them.

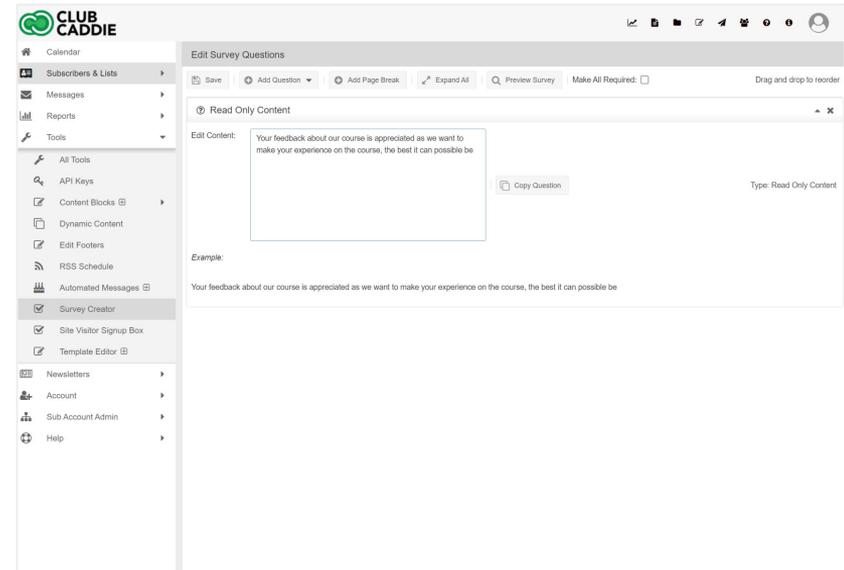
Read Only Content

The Read Only Content question type is not for creating questions that will be answerable by your respondents. Whatever content you enter in the Edit Content text box will be displayed in the survey. This is a great way to add some descriptions/background info to your survey. You can fully customize the content that will be displayed with HTML and CSS.

Text: One Line

The Text: One Line question prompts users to answer the question using a single line text box. This is perfect for questions where you are expecting very short (a few words or less), open-ended responses but don't need further input validation like you would need for an email address.

Example questions: First Name, Last Name, Favorite TV Show.



Question Types

Text: Multi-line

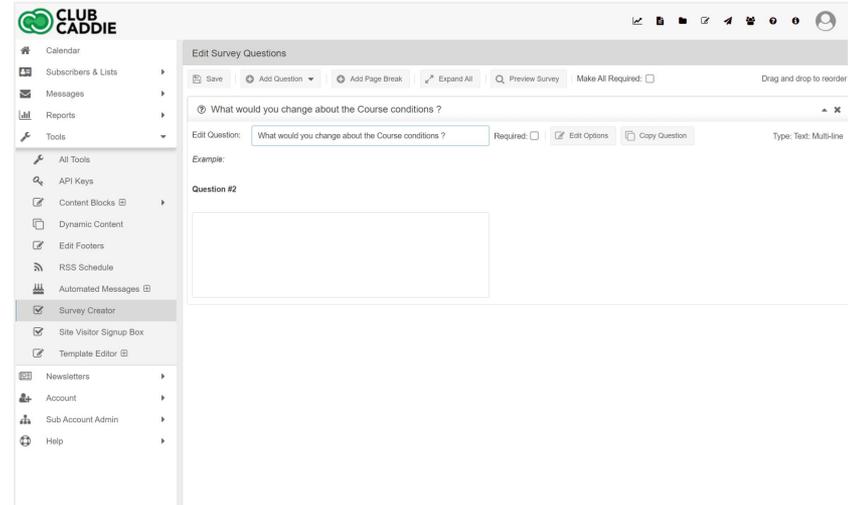
The Text: Multi-line question prompts users to answer the question using a multi-line text box. This question type would be best used for questions that would typically have longer (several sentence), open-ended responses. You can edit the height and width (in pixels) of the text box by clicking the **Edit Options** button.

Example questions: Enter any further comments here. What was your favorite part of our event? What could we do to improve?

Text: Email Address

The Text: Email Address question requires users to enter a valid email address in a single-line text box.

Example questions: What is your email address?



Question Types

True/False and Yes/No

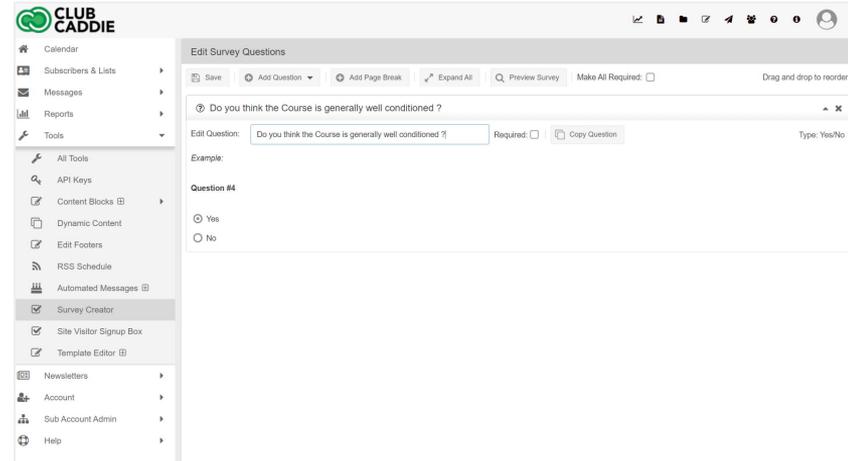
The True/False question will display two radio buttons with True and False labels. The respondent will only be able to select one or the other. The Yes/No question works the exact same way but the display values are Yes and No instead of True and False. This type is ideal for questions needing a simple true or false validation.

Example questions: Are you 18 years of age or older? Do you consent to continue taking this survey?

Rate

The Rate question displays a slider which respondents can use to specify a numeric value. You can customize the number interval, increment value, Start/End Labels, and Width (in pixels) of the slider by clicking the **Edit Options** button. The start label will be displayed at the left side of the slider and the end label will be displayed at the right side of the slider. This type of question is useful when you want respondents to rate something.

Example Questions: Please rate your experience on a scale of 1 to 10 with 1 being Terrible and 10 being Excellent.



Question Types

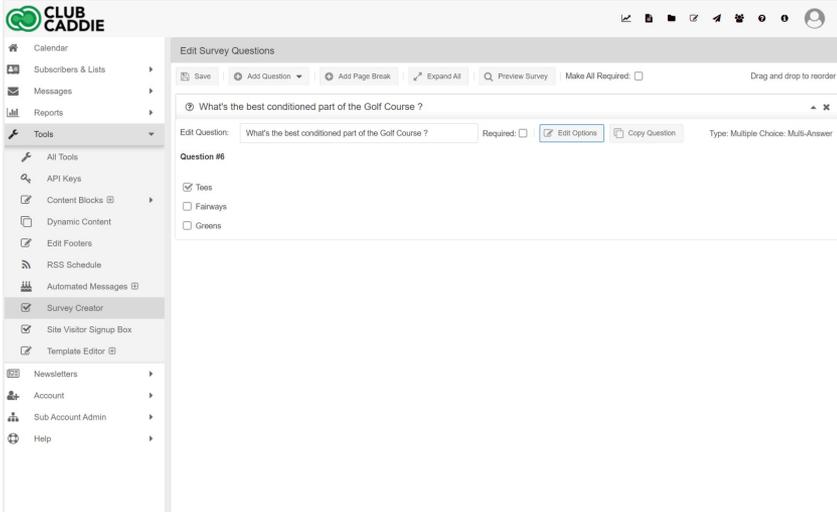
Date

The Date question allows users to select a date using a date selector pop up. The entered value must be a valid date.

Example questions: Please enter your date of birth. When would you like to make a reservation?

Multiple Choice: Single Answer and Multi-Answer

The Multiple Choice question types will display specified answer choices in either radio button (single answer) or text box (multi-answer) format. You can customize the response options by clicking **Edit Options**. The options window for this question type will display a grid of all the response options you have created.



The screenshot shows the 'Edit Survey Questions' interface in the CLUB CADDIE system. On the left is a sidebar with navigation options: Calendar, Subscribers & Lists, Messages, Reports, Tools, All Tools, API Keys, Content Blocks, Dynamic Content, Edit Footers, RSS Schedule, Automated Messages, Survey Creator, Site Visitor Signup Box, Template Editor, Newsletters, Account, Sub Account Admin, and Help. The main content area is titled 'Edit Survey Questions' and includes a toolbar with 'Save', 'Add Question', 'Add Page Break', 'Expand All', 'Preview Survey', and 'Make All Required'. Below the toolbar, the question text is 'What's the best conditioned part of the Golf Course?'. The question is marked as 'Required' and has 'Type: Multiple Choice: Multi-Answer'. There are three radio button options: 'Tees' (checked), 'Fairways', and 'Greens'. An 'Edit Options' button is visible next to the question text.

Question Types

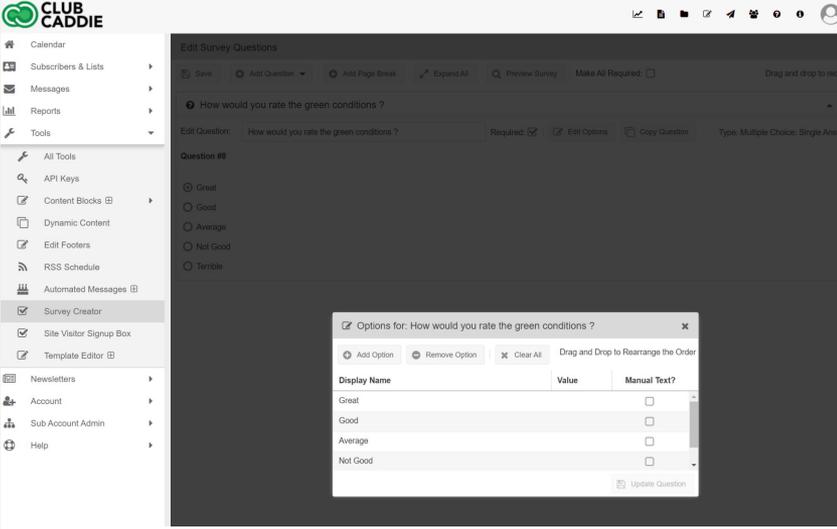
Adding a New Response Option

1. Click **Add Option**.

Editing a Response Option

You can edit the display text and value of each response option.

1. Click the response option you would like to edit.
2. Make any desired changes to the text values.
3. When you are finished editing, click **Update** to save your changes or click **Cancel** to discard your changes.
4. If you would like respondents to be able to enter their own custom value as one of the options, check the box that says **Manual Text?**. This will display an open-ended short answer text box next to the display text.



The screenshot shows the CLUB CADDIE Survey Creator interface. A modal window titled "Options for: How would you rate the green conditions?" is open, allowing for the editing of response options. The modal includes buttons for "Add Option", "Remove Option", and "Clear All", along with a "Drag and Drop to Rearrange the Order" instruction. Below these buttons is a table with columns for "Display Name", "Value", and "Manual Text?".

Display Name	Value	Manual Text?
Great		<input type="checkbox"/>
Good		<input type="checkbox"/>
Average		<input type="checkbox"/>
Not Good		<input type="checkbox"/>

At the bottom right of the modal, there is an "Update Question" button.

Question Types

Removing a Row/Column Header

1. Click on the response option in the grid that you would like to remove.
2. Click **Remove Option**.
3. To clear all response options, click **Clear All**.

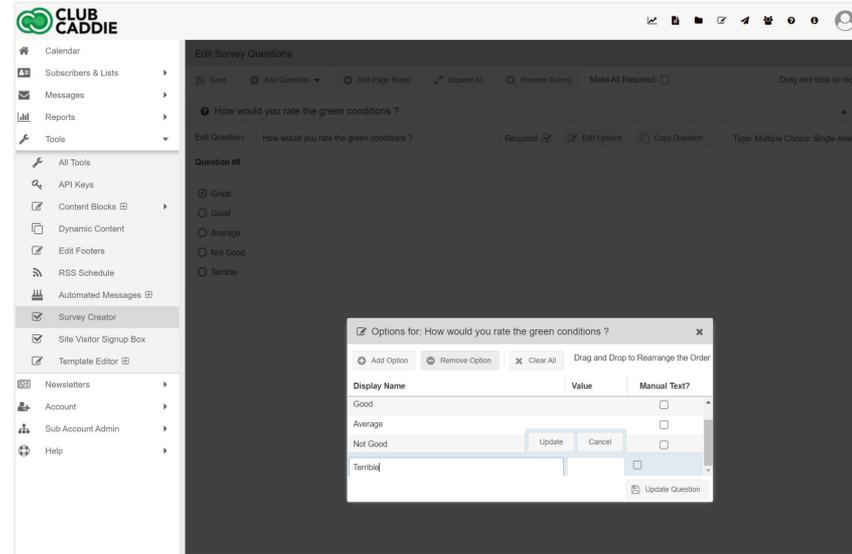
Other Tips

- Drag and drop to reorder the rows/columns.
- When you are done customizing the question options, click Update Question.

Example questions:

Single Answer: What is your favorite color? Options: Red, Blue, Green, Other (with text box).

Multiple Answer: Which of the following stores have you visited in the past week? Select all that apply. Options: Best Buy, Sears, Target, Walmart, Costco.



The screenshot shows the CLUB CADDIE Survey Creator interface. On the left is a navigation menu with options like Calendar, Subscribers & Lists, Messages, Reports, Tools, All Tools, API Keys, Content Blocks, Dynamic Content, Edit Footers, RSS Schedule, Automated Messages, Survey Creator, Site Visitor Signup Box, Template Editor, Newsletters, Account, Sub Account Admin, and Help. The main area displays a question editor for 'How would you rate the green conditions?'. A modal window titled 'Options for: How would you rate the green conditions?' is open, showing a table of options with columns for 'Display Name', 'Value', and 'Manual Text?'. The options listed are Good, Average, Not Good, and Terrible. The modal includes buttons for 'Add Option', 'Remove Option', 'Clear All', 'Update', 'Cancel', and 'Update Question'.

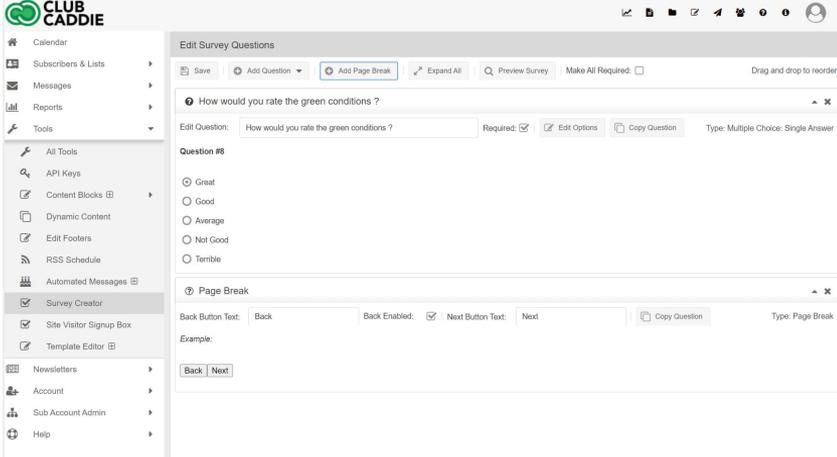
Display Name	Value	Manual Text?
Good		<input type="checkbox"/>
Average		<input type="checkbox"/>
Not Good		<input type="checkbox"/>
Terrible		<input type="checkbox"/>

Paging

You can separate your survey into multiple pages by using page breaks. A page will end with the question right before a page break and the next page will continue with the question immediately after a page break.

Adding a Page Break

1. In the main survey grid (Tools -> Survey Creator), select a survey and click **Edit Questions**.
2. Click **Add Page Break**.
3. The new page break will be added at the bottom of the survey, but you can drag and drop to replace it anywhere you'd like.



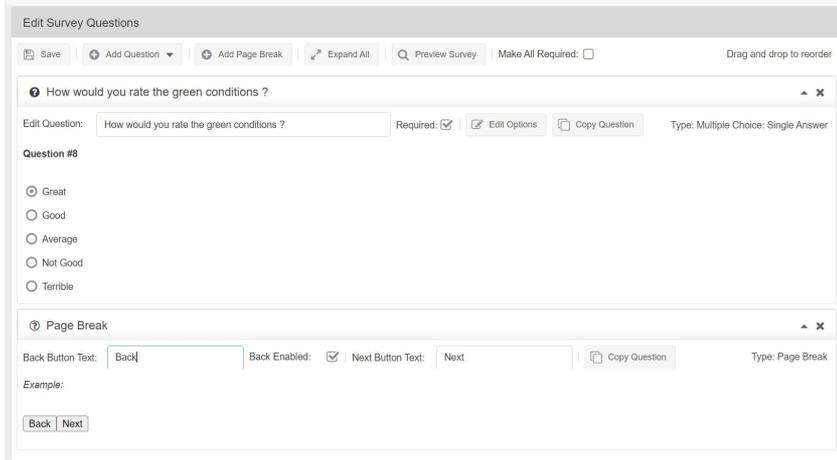
Paging

Editing a Page Break

1. Expand the page break by clicking the down arrow on the right hand side of the page break, if it is not already expanded.
2. Enter the text you would like displayed on the Next Button in the **Next Button Text** text box.
3. Enter the text you would like displayed on the Back Button in the **Back Button Text** text box.
4. If you do not want the back button to display, uncheck the box that says **Back Enabled**. It is recommended that you disable the back button for the first page break in a survey, as there will be no previous page.

Removing a Page Break

1. Click the X button on the page break.

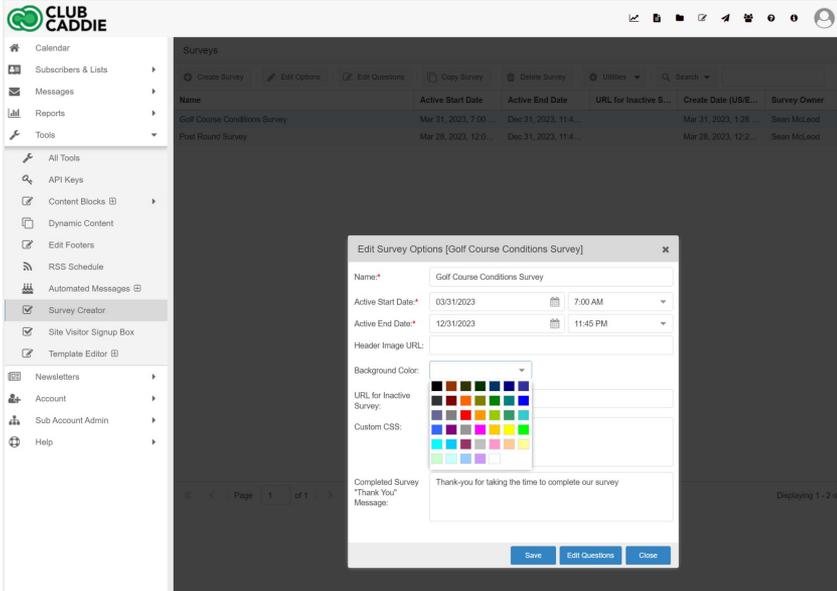


The screenshot shows the 'Edit Survey Questions' interface. At the top, there are buttons for 'Save', 'Add Question', 'Add Page Break', 'Expand All', 'Preview Survey', and 'Make All Required'. Below this, a question is displayed: 'How would you rate the green conditions?'. The question is marked as 'Required' and has a 'Type' of 'Multiple Choice: Single Answer'. The options are: Great, Good, Average, Not Good, and Terrible. Below the question is a 'Page Break' configuration section. It includes a 'Back Button Text' field with the value 'Back', a 'Back Enabled' checkbox which is checked, a 'Next Button Text' field with the value 'Next', and a 'Copy Question' button. An 'Example' section shows a preview of the 'Back' and 'Next' buttons. A close button (X) is visible on the right side of the page break configuration.

Styling

It is possible to add some basic styling options to your survey, such as an icon, a thank you page, and CSS.

1. In the main survey grid (Tools -> Survey Creator), select a survey and click **Edit Options**.
2. If you would like a specific image to always be displayed at the top of your survey, enter the URL for the image in the **Header Image URL** text box.
3. You can select a background color for your survey with the **Background Color** drop down selector.
4. When your survey is no longer active, you can specify a URL that you would like users to be redirected to when trying to access the survey by entering it in the **URL for Inactive Survey** text box.
5. If you have custom CSS that you would like to apply to your survey, enter it in the **Custom CSS** text box.
6. After subscribers take your survey, they will be redirected to a thank you page that will display a simple thank you message. To customize this message, enter your custom message in the **Completed Survey "Thank You" Message** text box.



The screenshot shows the CLUB CADDIE Survey Creator interface. On the left is a navigation menu with options like Calendar, Subscribers & Lists, Messages, Reports, Tools, All Tools, API Keys, Content Blocks, Dynamic Content, Edit Footers, RSS Schedule, Automated Messages, Survey Creator, Site Visitor Signup Box, Template Editor, Newsletters, Account, Sub Account Admin, and Help. The main area displays a table of surveys. The 'Golf Course Conditions Survey' is selected, and the 'Edit Survey Options' dialog box is open. The dialog box contains the following fields:

- Name: Golf Course Conditions Survey
- Active Start Date: 03/31/2023 (7:00 AM)
- Active End Date: 12/31/2023 (11:45 PM)
- Header Image URL: (empty)
- Background Color: (color picker showing a grid of colors)
- URL for Inactive Survey: (empty)
- Custom CSS: (empty)
- Completed Survey "Thank You" Message: Thank-you for taking the time to complete our survey

Buttons for Save, Edit Questions, and Close are visible at the bottom of the dialog box.

Previewing

Previewing your survey allows you to see what your survey will look like to respondents and test the paging of your survey. You can also test submitting the survey to see how your thank you message will be displayed. No responses will be saved when you submit the survey in preview mode. You will be redirected to your inactive survey URL (if specified) or the default inactive message will be displayed if the survey you are previewing is inactive, so you can test that your redirect link is valid.

Golf Course Conditions Survey

How would you rate the green conditions ?*

- Great
- Good
- Average
- Not Good
- Terrible

Back

Next

Previewing

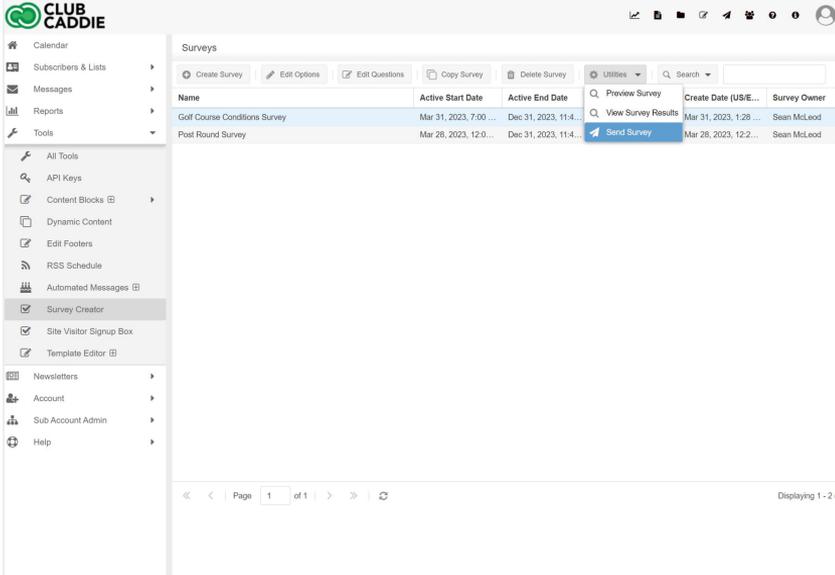
There are two ways you can preview your survey:

From the Main Survey Grid

1. Click **Tools**.
2. Click **Survey Creator**.
3. Select a survey.
4. Click **Utilities**.
5. Click **Preview Survey**.

From the Survey Question Editor

1. Click **Tools**.
2. Click **Survey Creator**.
3. Select a survey.
4. Click **Edit Questions**.
5. After you are done editing the questions to your survey, click **Save**.
6. Click **Preview Survey**.



Name	Active Start Date	Active End Date	Preview Survey	Create Date (US/E...	Survey Owner
Golf Course Conditions Survey	Mar 31, 2023, 7:00 ...	Dec 31, 2023, 11:4...	Preview Survey	Mar 31, 2023, 1:28 ...	Sean McLeod
Post Round Survey	Mar 28, 2023, 12:0...	Dec 31, 2023, 11:4...	Preview Survey	Mar 28, 2023, 12:2...	Sean McLeod

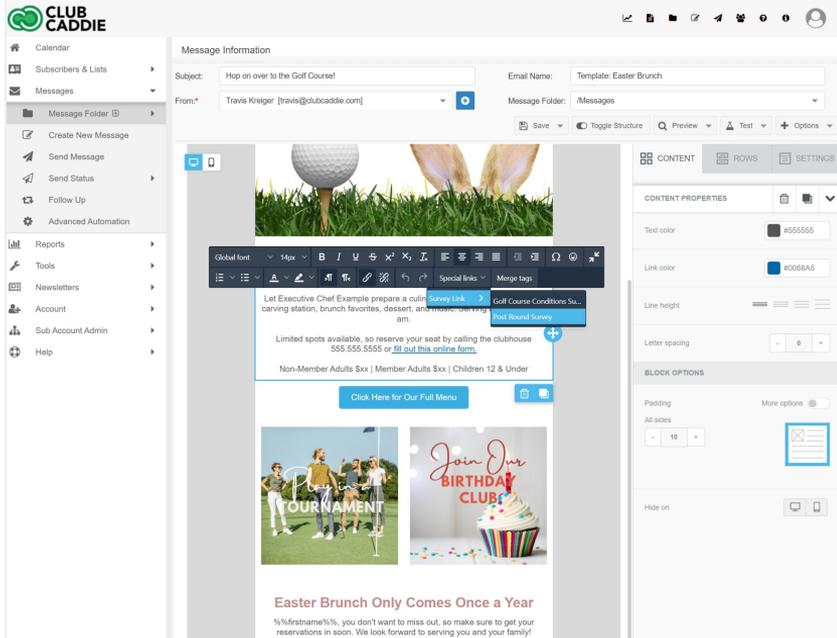
Send Survey & Get Responses

Insert Survey Link into HTML Message

1. Create a new message or edit an existing message.
2. Click the **Insert Survey** button in the message editor toolbar.
3. In the "Link text" field, enter the text you'd like to insert into the message that will be linked to the survey.
4. Click the survey name to insert.
5. Save the changes to the message.

Insert Survey Link into Drag & Drop Message

1. Create a new or edit an existing message with the drag and drop editor.
2. Click to edit the text and highlight the word(s) where you want to insert the survey link.
3. Click Special Links -> Survey Link -> Click on a survey name to insert the link.
4. Save the changes to the message.



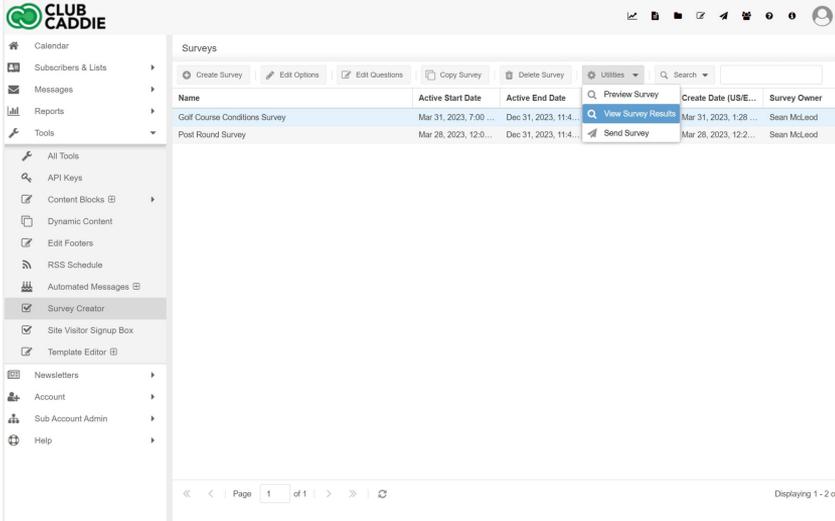
The screenshot displays the Club Caddie email editor interface. On the left is a navigation sidebar with options like Calendar, Messages, Reports, and Tools. The main editor area shows a message titled "Hop on over to the Golf Course!". A text editor toolbar is overlaid on the message content, with the "Special Links" button highlighted. A dropdown menu is open, showing "Survey Link" as the selected option. Below the menu, a preview of the email content is visible, featuring a golf ball on a green, a chef, and promotional text for an Easter Brunch and a Birthday Club. The right sidebar contains content and settings panels for the message.

Analyze Survey Results

1. Go to **Tools -> Survey Creator**
2. Select the survey you would like to see the results for.
3. Click **Utilities**
4. Click **View Survey Results**
5. If you'd like to export all the survey results into an Excel file, click the **Export** button
6. The default view will show each subscriber who responded, when they finished the survey, and what their responses were.
7. Click **View Results by Question** if you'd like to see all the responses grouped by question.
8. Click **Export** to download the results into Excel.

You can also see which surveys were included in a send by following these steps:

1. Click Reports
2. Click Email Tracking
3. Select a send
4. Click View Tracking Report
5. In the report screen, click the tab that says Survey Results
6. You will see a list of the surveys that were linked to in the send. Select a survey and click View Survey Results to see the responses to the survey.



Name	Active Start Date	Active End Date	Preview Survey	Create Date (US/E...)	Survey Owner
Golf Course Conditions Survey	Mar 31, 2023, 7:00 ...	Dec 31, 2023, 11:4...	View Survey Results	Mar 31, 2023, 1:28 ...	Sean McLeod
Post Round Survey	Mar 28, 2023, 12:0...	Dec 31, 2023, 11:4...	Send Survey	Mar 28, 2023, 12:2...	Sean McLeod