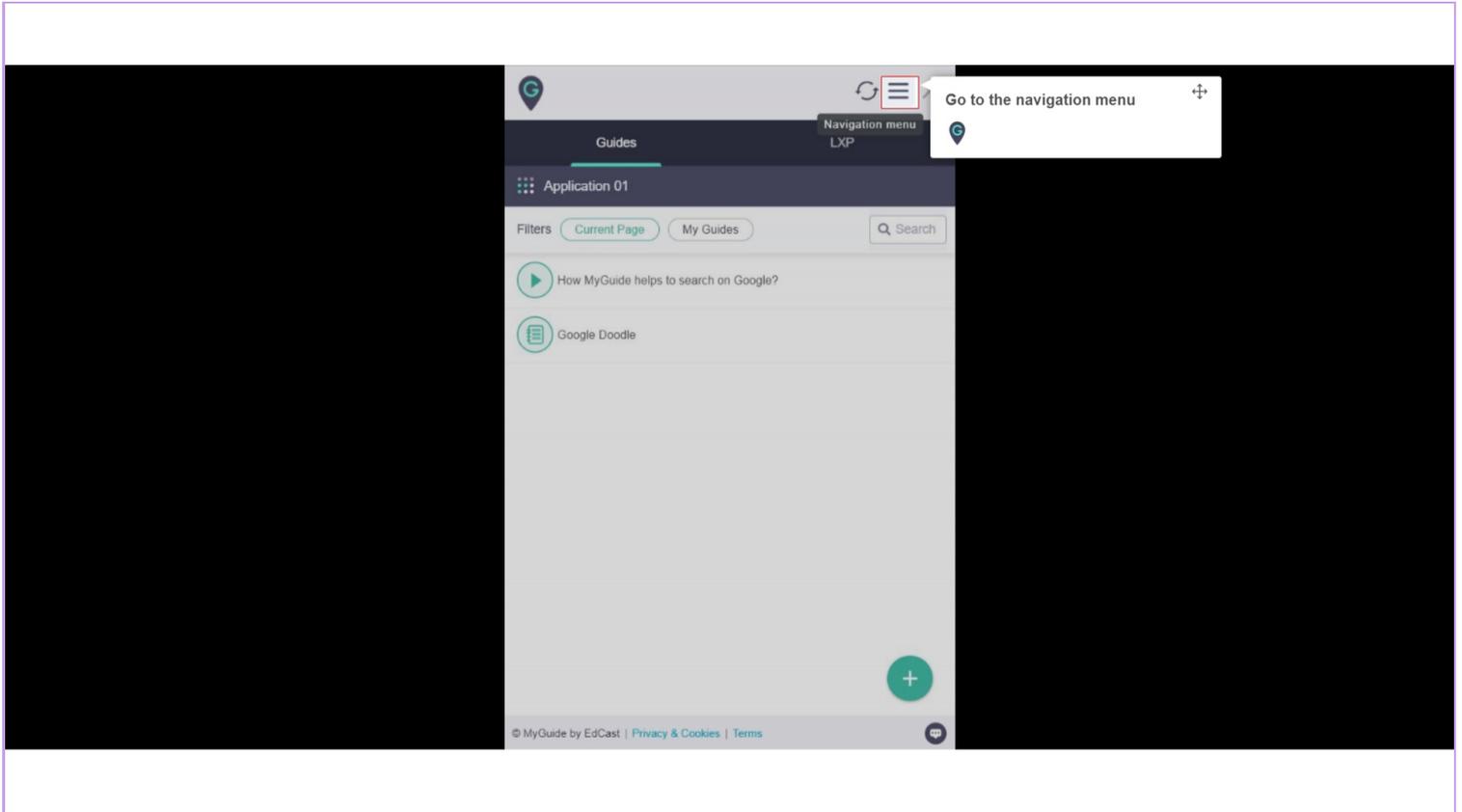




How to Manage Surveys

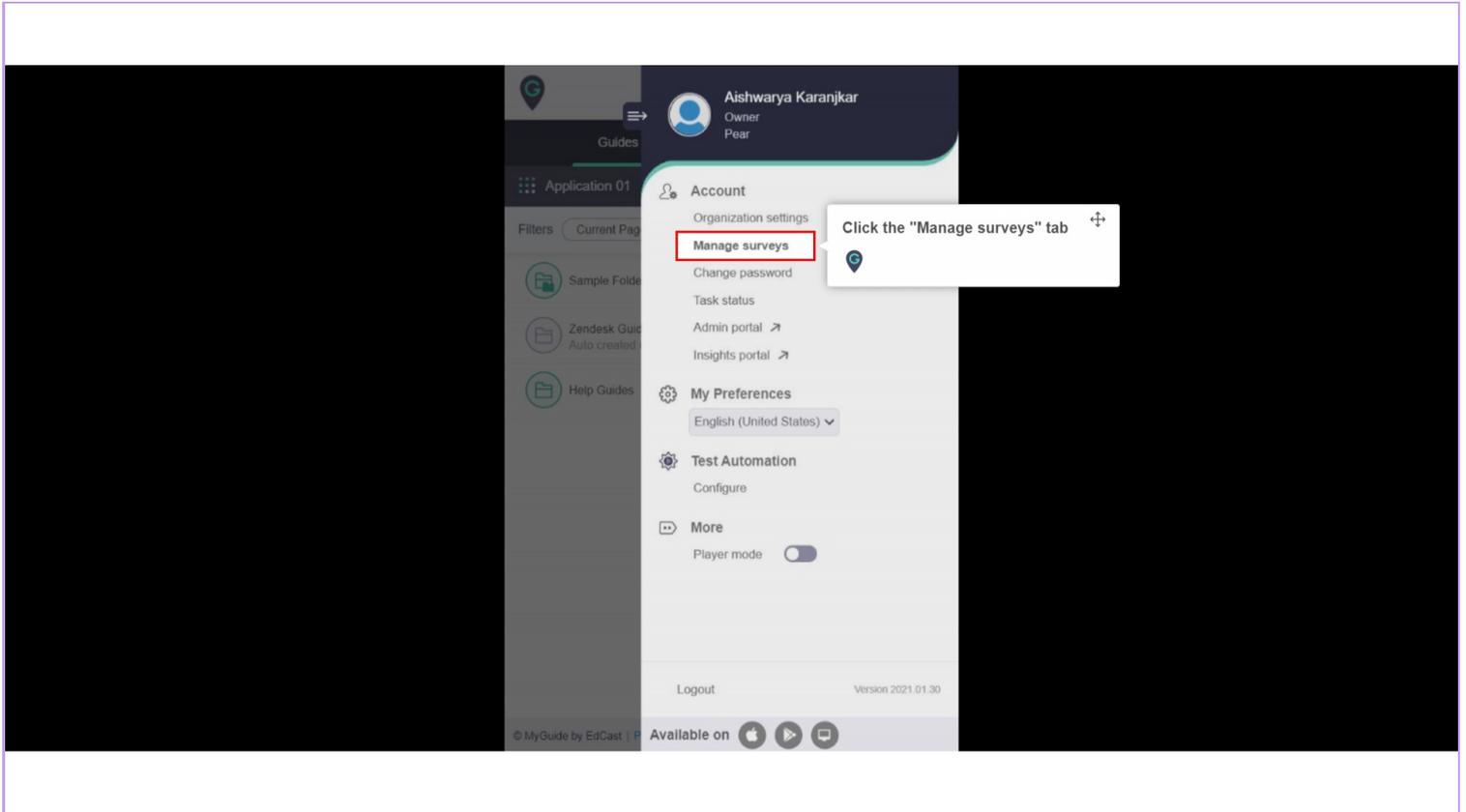
Step: 01

1) Go to the navigation menu



Step: 02

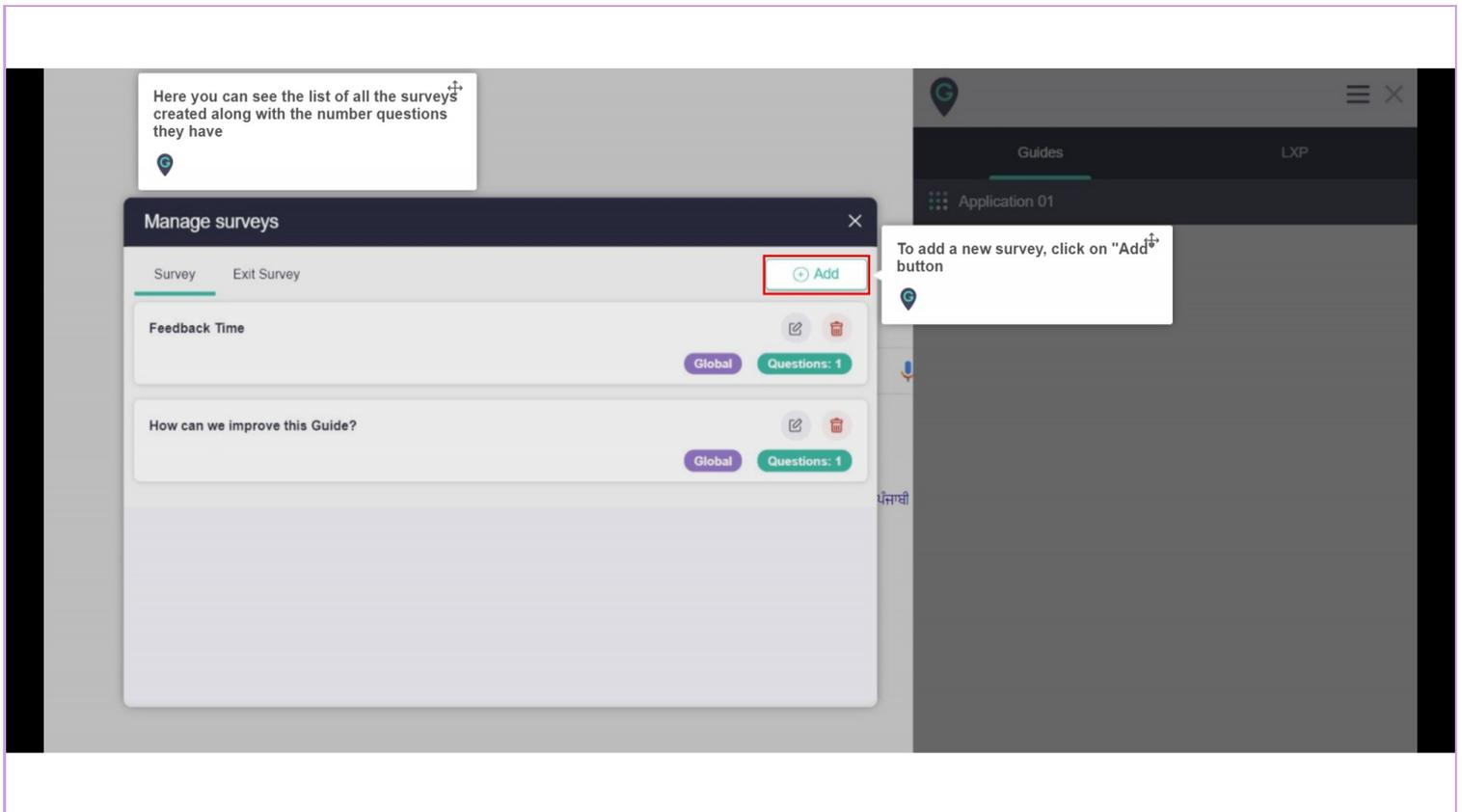
1) Click the "Manage surveys" tab



Step: 03

Here you can see the list of all the surveys created along with the number questions they have

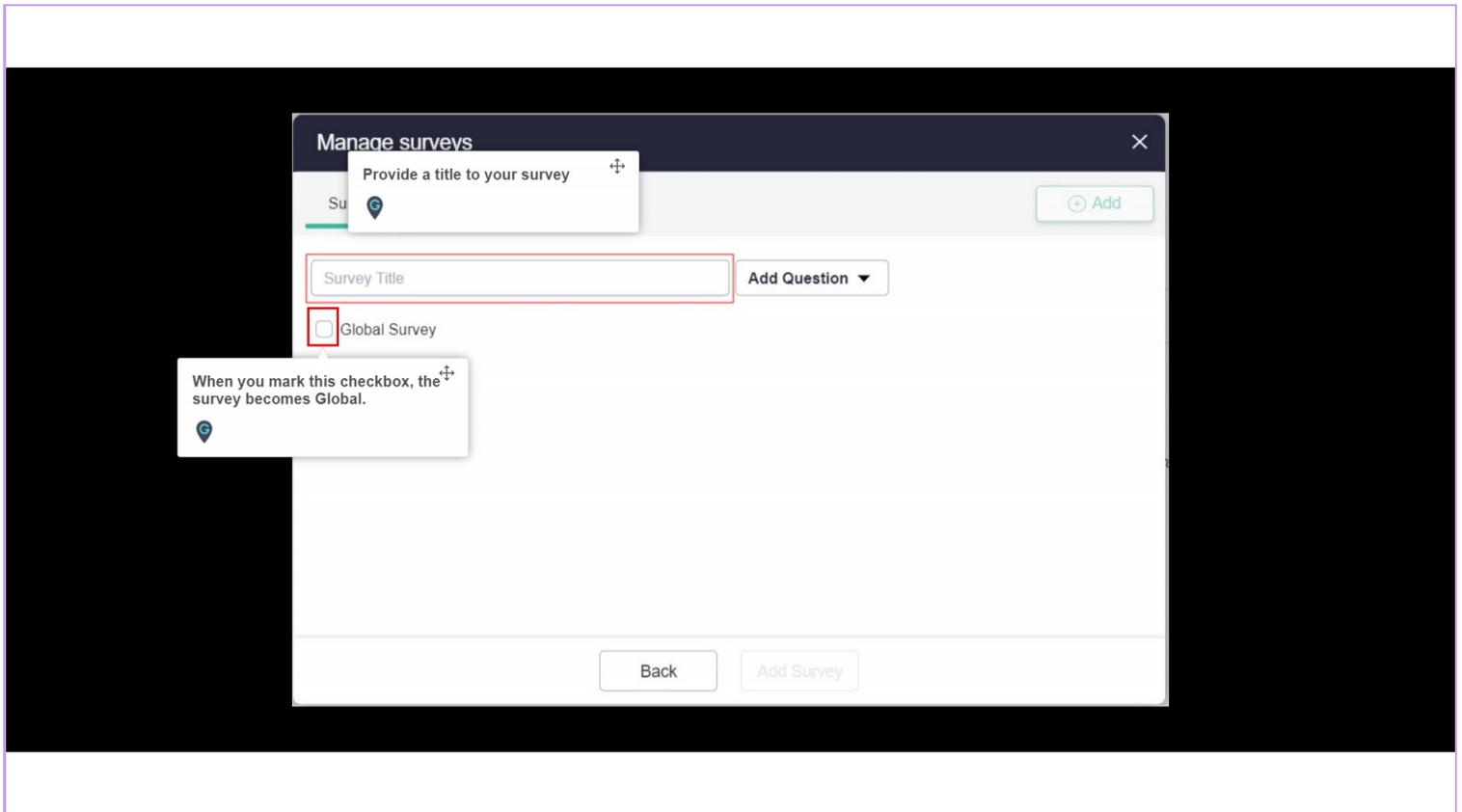
1) To add a new survey, click on "Add" button



Step: 04

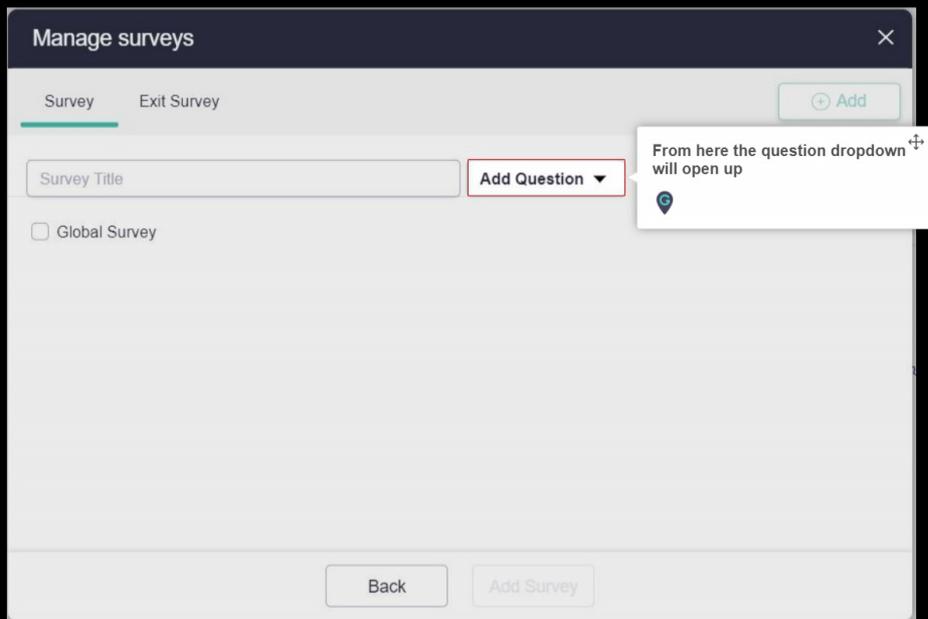
Provide a title to your survey

1) When you mark this checkbox, the survey becomes Global.



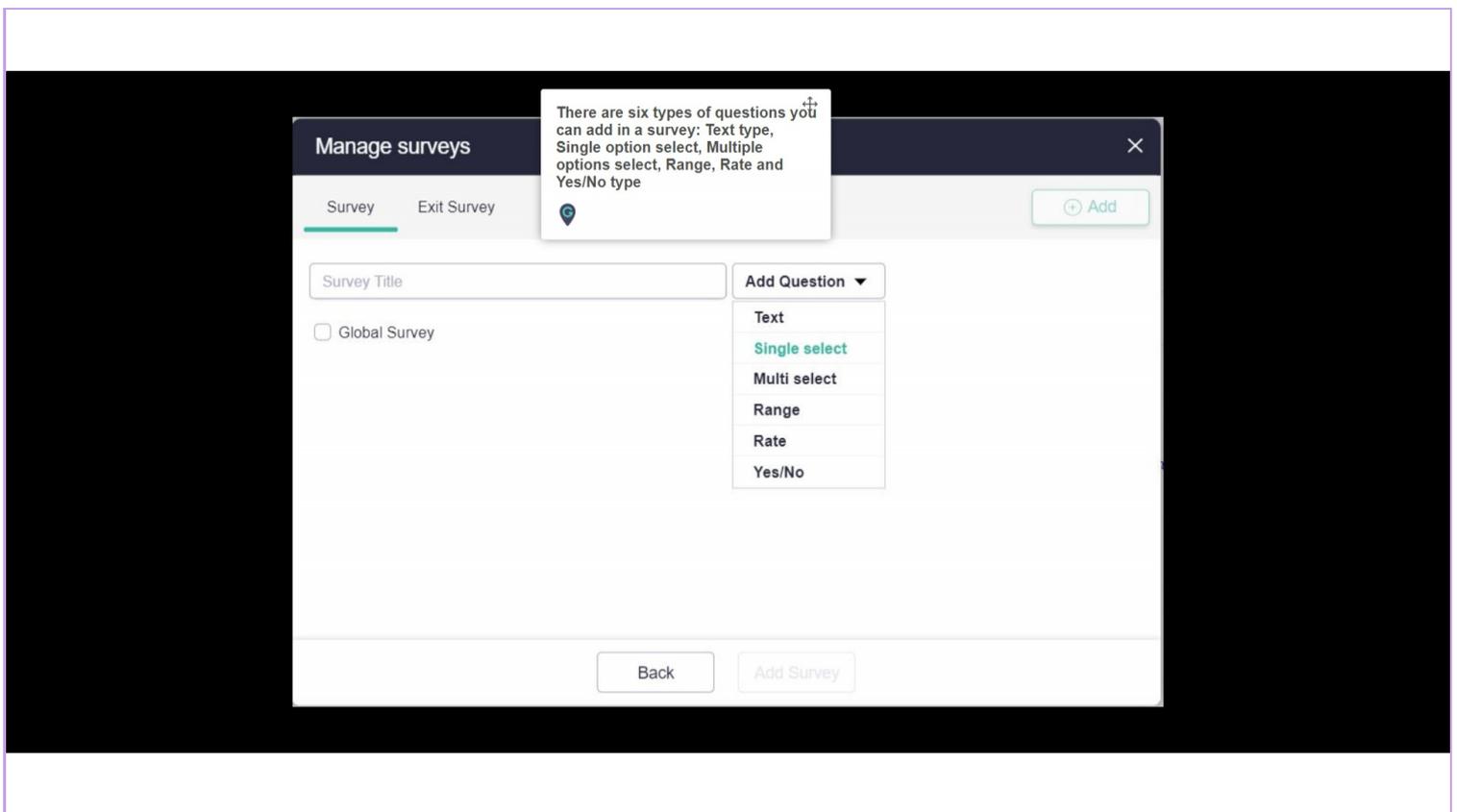
Step: 05

1) From here the question dropdown will open up



Step: 06

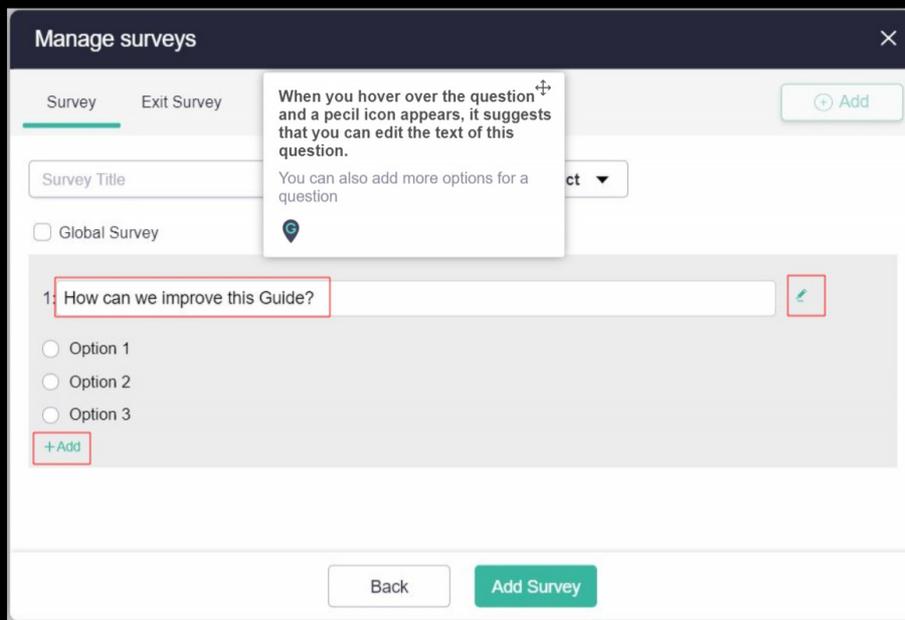
There are six types of questions you can add in a survey: Text type, Single option select, Multiple options select, Range, Rate and Yes/No type



Step: 07

When you hover over the question and a pencil icon appears, it suggests that you can edit the text of this question.

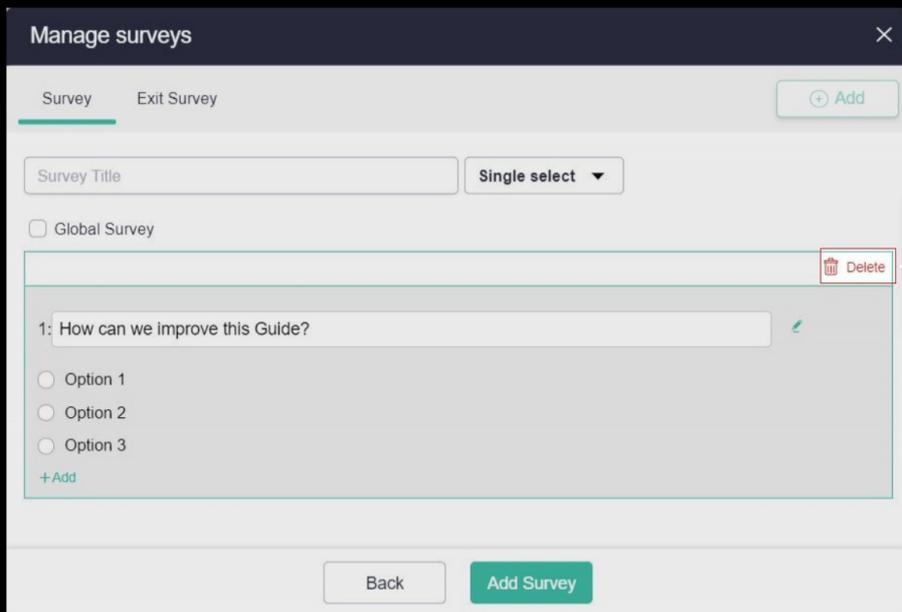
You can also add more options for a question



The screenshot displays the 'Manage surveys' interface. At the top, there are tabs for 'Survey' and 'Exit Survey'. Below the tabs, there is a 'Survey Title' input field and a 'Global Survey' checkbox. A tooltip is visible, stating: 'When you hover over the question and a pencil icon appears, it suggests that you can edit the text of this question. You can also add more options for a question'. The main area shows a question: '1: How can we improve this Guide?' with a pencil icon to its right. Below the question, there are three radio button options: 'Option 1', 'Option 2', and 'Option 3'. A '+ Add' button is located below the options. At the bottom of the interface, there are 'Back' and 'Add Survey' buttons.

Step: 08

1) If you want to delete a question from your unsaved survey, you get a delete option in the upper right corner of every question

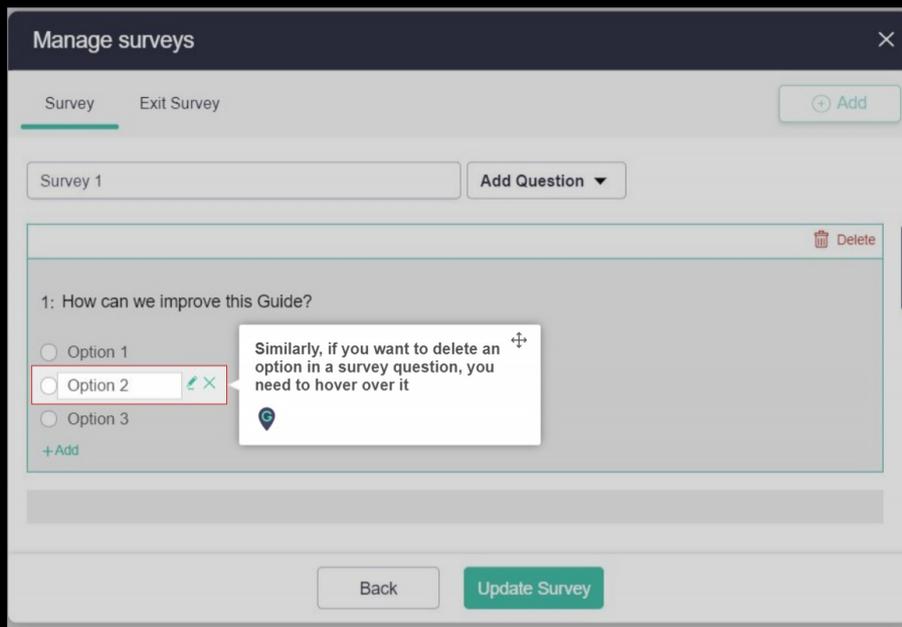


The screenshot shows a 'Manage surveys' dialog box with a dark header and a light body. At the top right of the dialog is a close button (X). Below the header, there are two tabs: 'Survey' (selected) and 'Exit Survey'. To the right of the tabs is a '+ Add' button. Below the tabs, there is a 'Survey Title' input field and a 'Single select' dropdown menu. Underneath is a checkbox labeled 'Global Survey'. The main area contains a list of questions. The first question is '1: How can we improve this Guide?' with a trash can icon and the word 'Delete' in a red box to its right. Below the question are three radio button options: 'Option 1', 'Option 2', and 'Option 3'. At the bottom left of the question area is a '+Add' link. At the bottom of the dialog are two buttons: 'Back' and 'Add Survey'.

If you want to delete a question from your unsaved survey, you get a delete option in the upper right corner of every question

Step: 09

1) Similarly, if you want to delete an option in a survey question, you need to hover over it



Step: 10

You can add all six types of questions in a survey

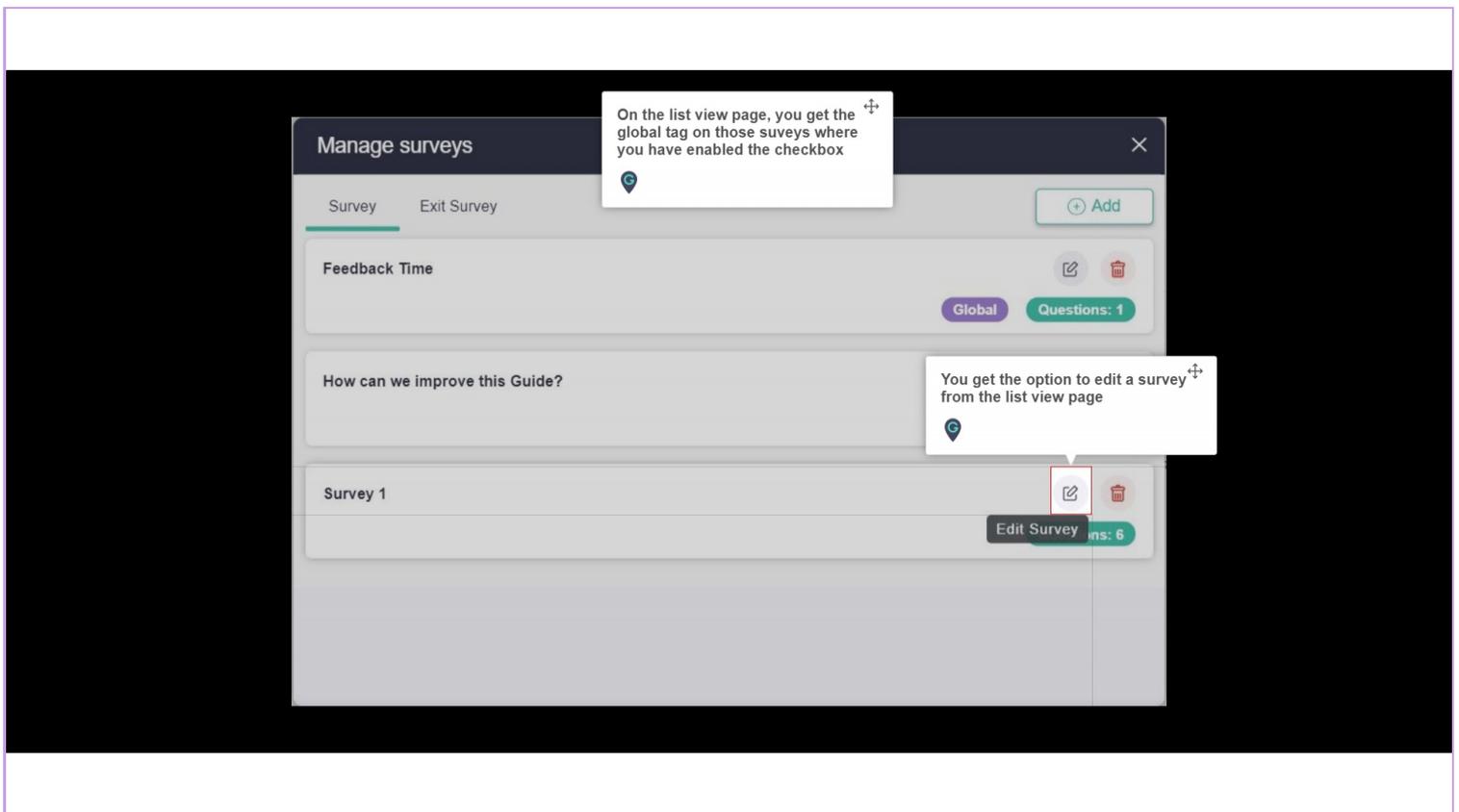
1) Once you are done, you can click on "Add Survey" button to save this survey

The screenshot displays the 'Manage surveys' interface. At the top, there are tabs for 'Survey' and 'Exit Survey', and an 'Add' button. A notification box at the top center states: 'You can add all six types of questions in a survey'. Below the tabs, there is a text input field containing 'Survey 1' and a 'Range' dropdown menu. A checkbox labeled 'Global Survey' is present. The main content area contains two questions: '3: How can we improve this Guide?' with a text input field, and '4: Please rate this guide on the scale of 1 to 10'. At the bottom, there are 'Back' and 'Add Survey' buttons. The 'Add Survey' button is highlighted with a red border. A second notification box at the bottom right states: 'Once you are done, you can click on "Add Survey" button to save this survey'.

Step: 11

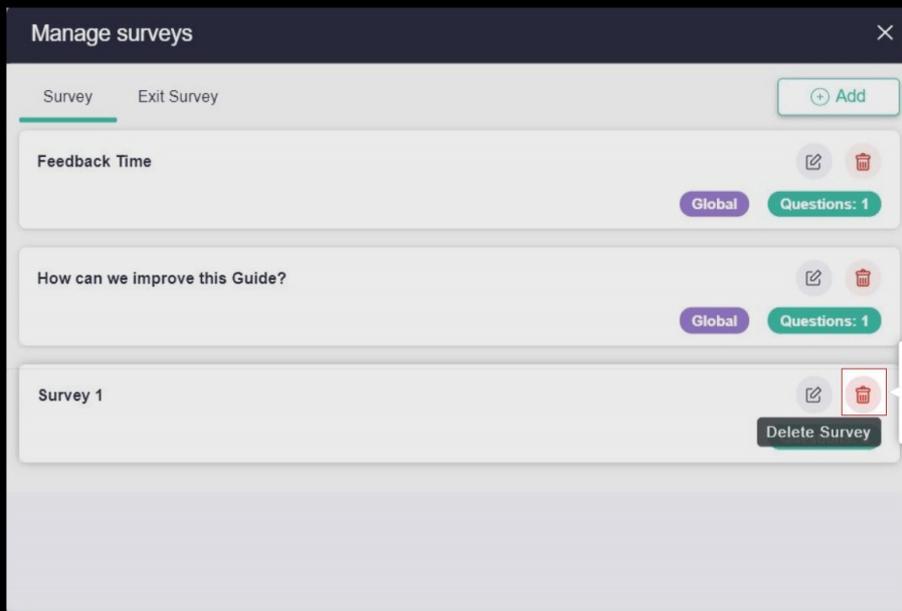
On the list view page, you get the global tag on those surveys where you have enabled the checkbox

1) You get the option to edit a survey from the list view page



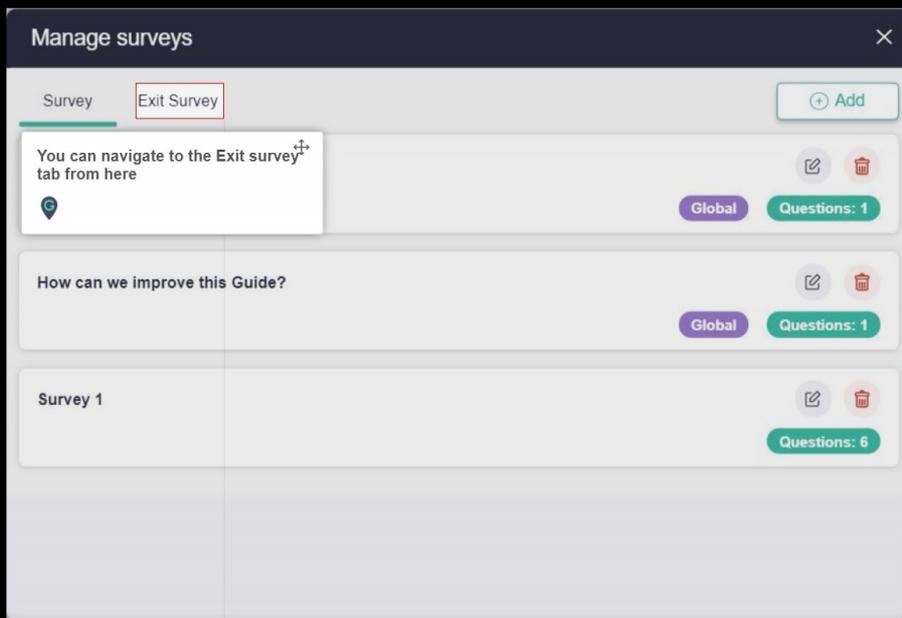
Step: 12

1) Similarly, get an option to delete the survey



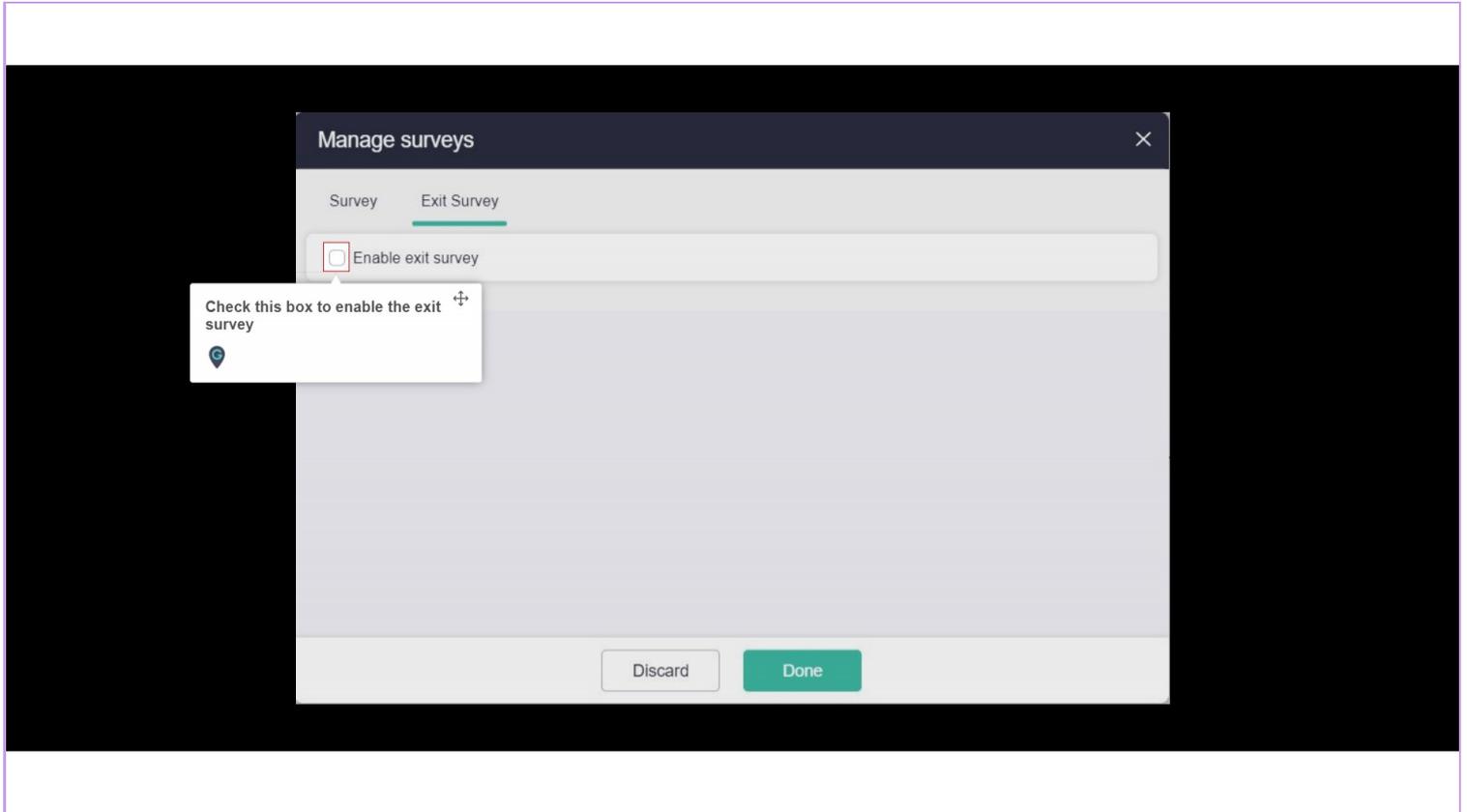
Step: 13

You can navigate to the Exit survey tab from here



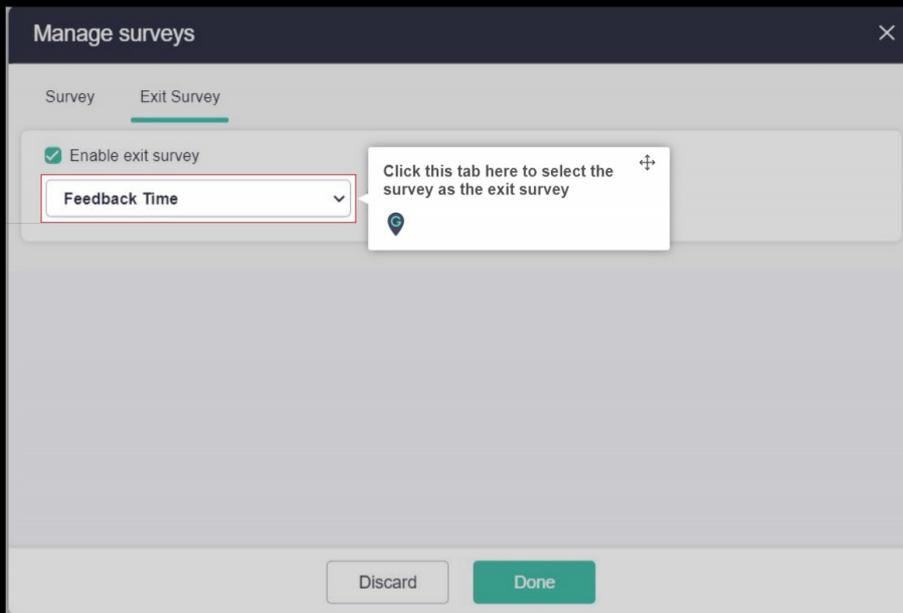
Step: 14

1) Check this box to enable the exit survey



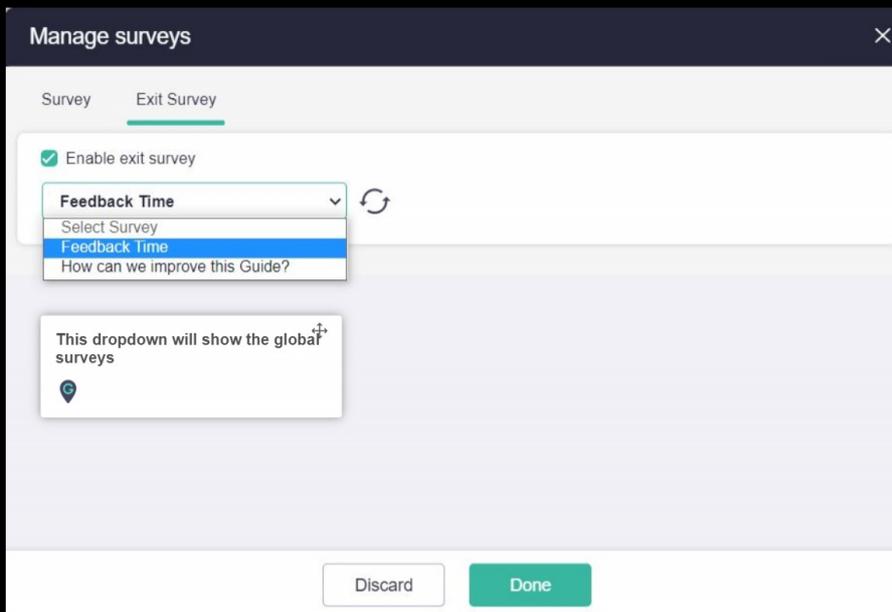
Step: 15

1) Click this tab here to select the survey as the exit survey



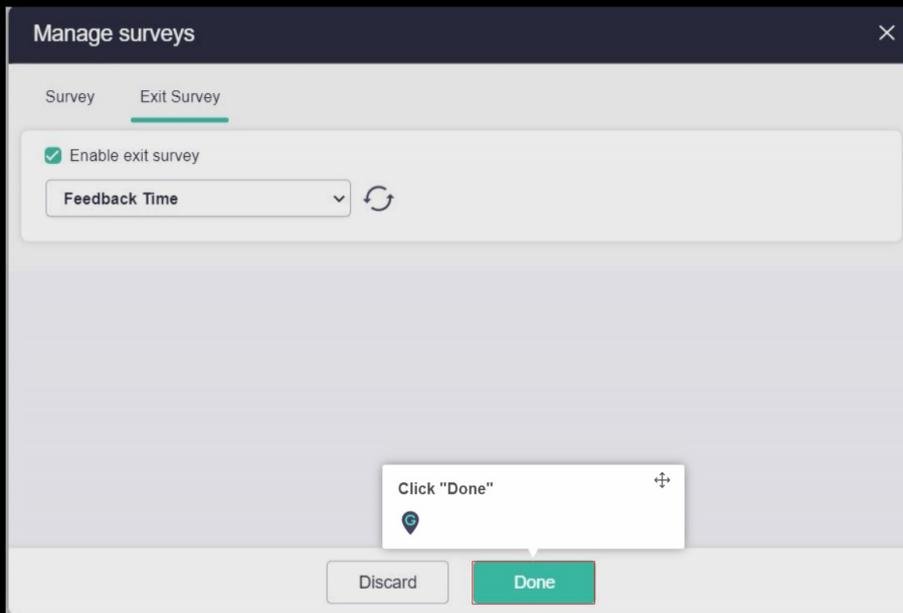
Step: 16

This dropdown will show the global surveys



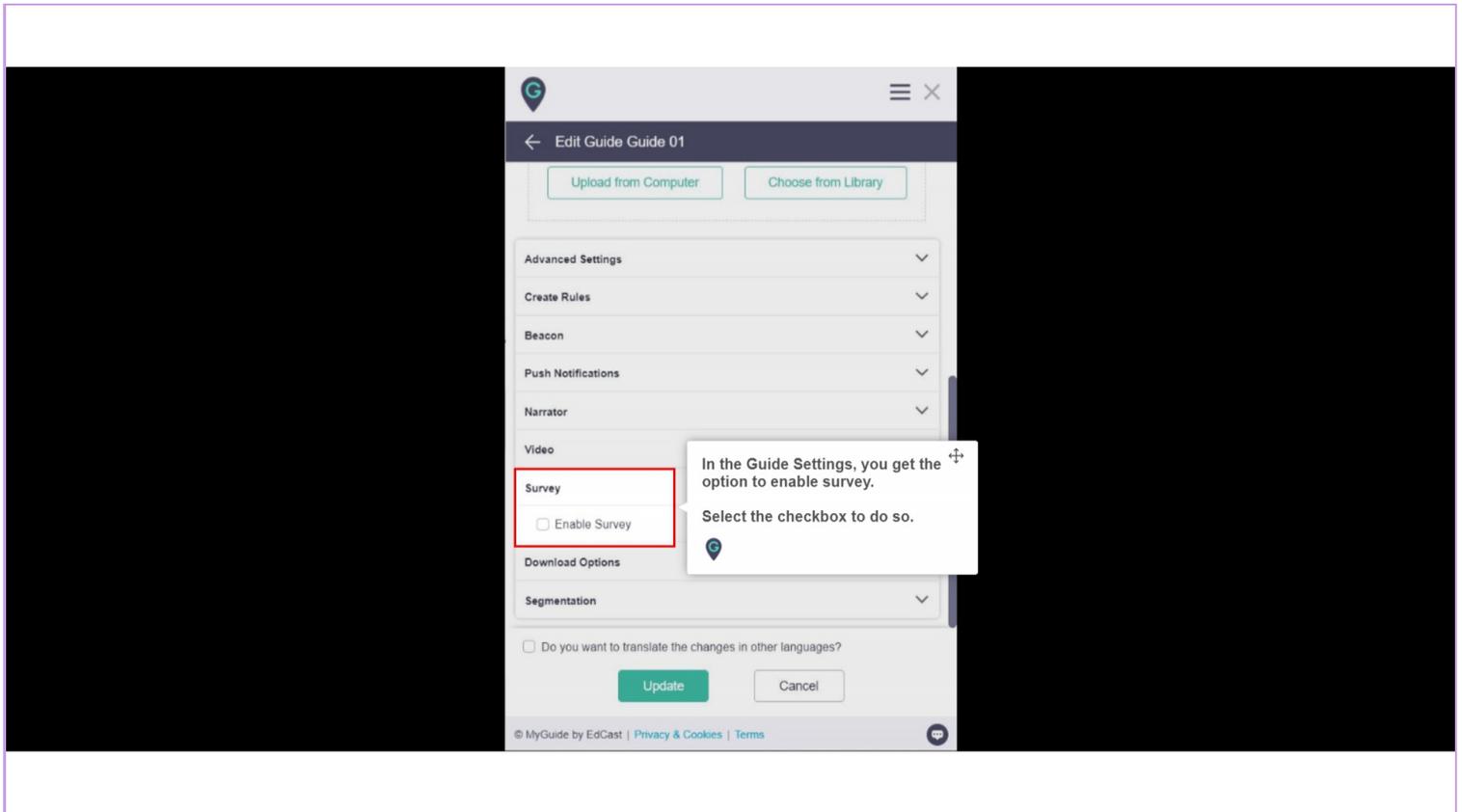
Step: 17

1) Click "Done"



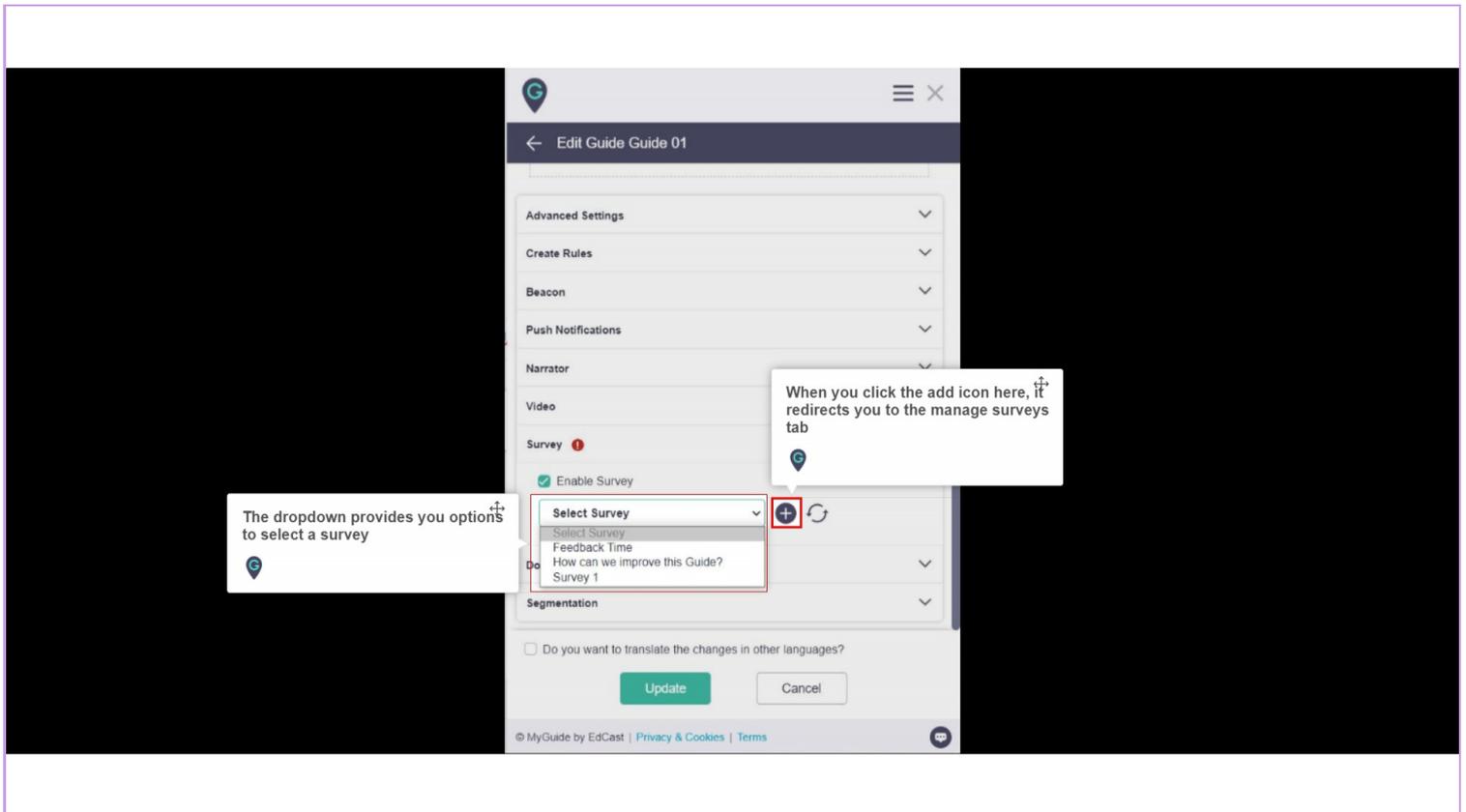
Step: 18

1) In the Guide Settings, you get the option to enable survey. Select the checkbox to do so.



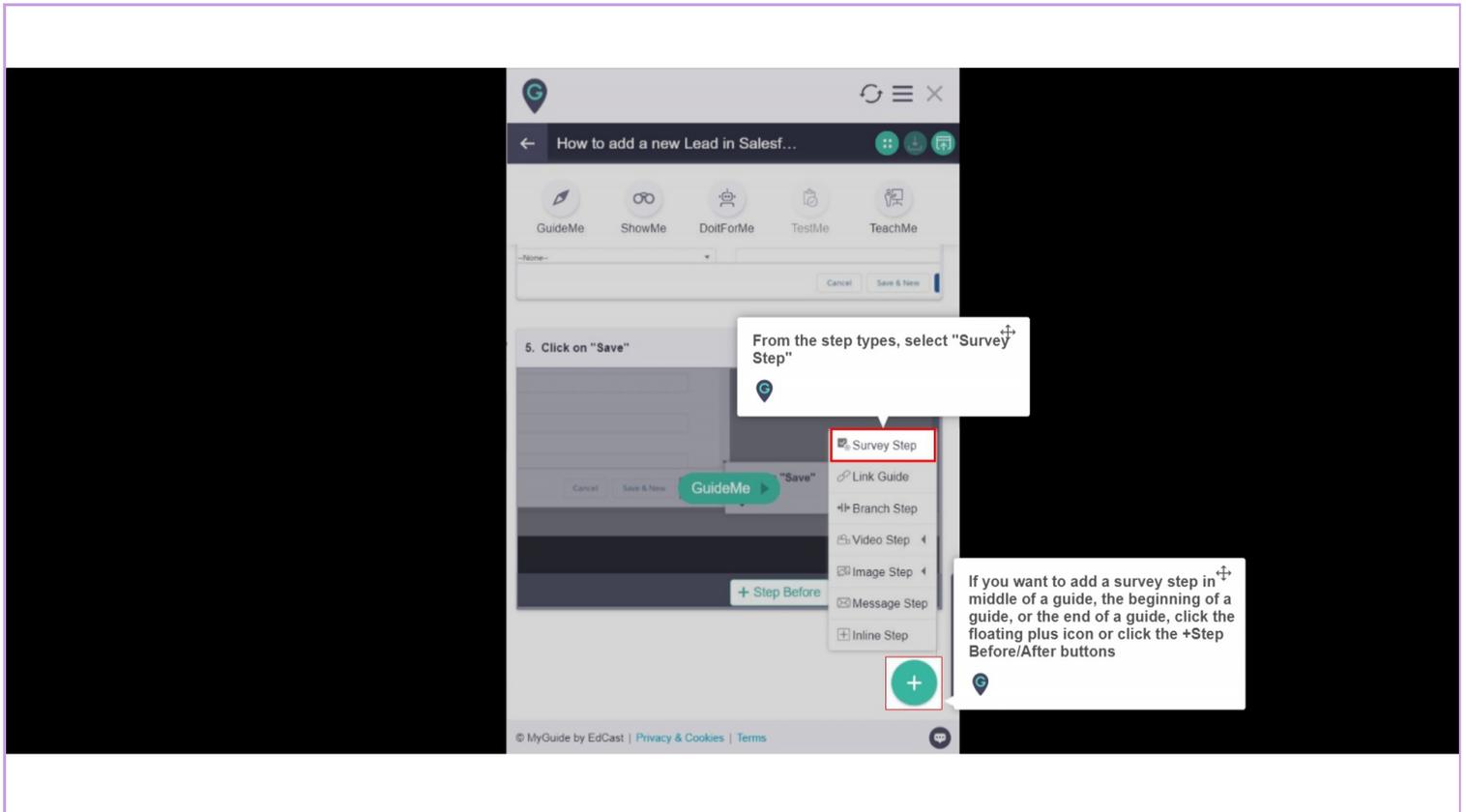
Step: 19

- 1) The dropdown provides you options to select a survey
- 2) When you click the add icon here, it redirects you to the manage surveys tab



Step: 20

- 1) If you want to add a survey step in middle of a guide, the beginning of a guide, or the end of a guide, click the floating plus icon or click the +Step Before/After buttons
- 2) From the step types, select "Survey Step"

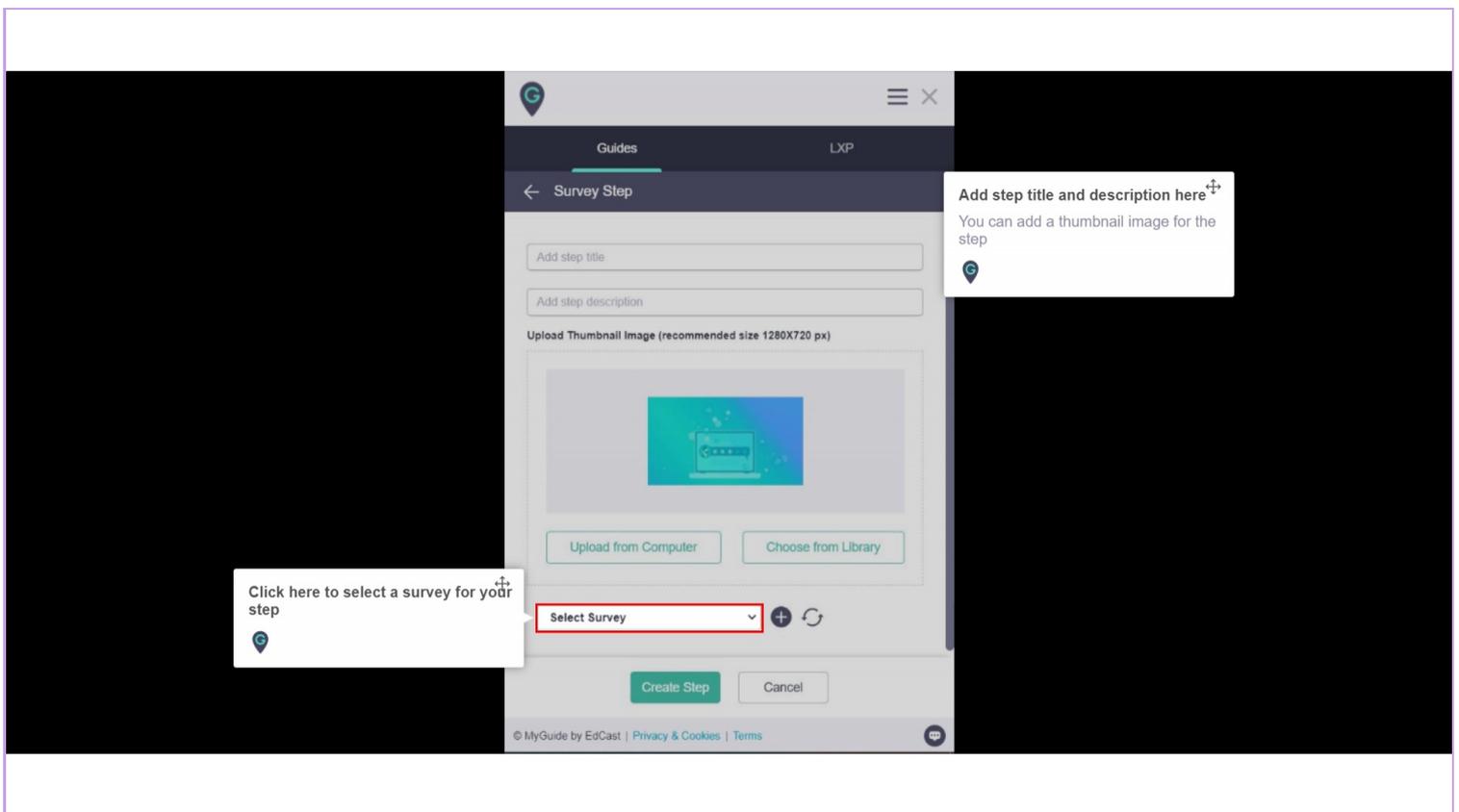


Step: 21

Add step title and description here

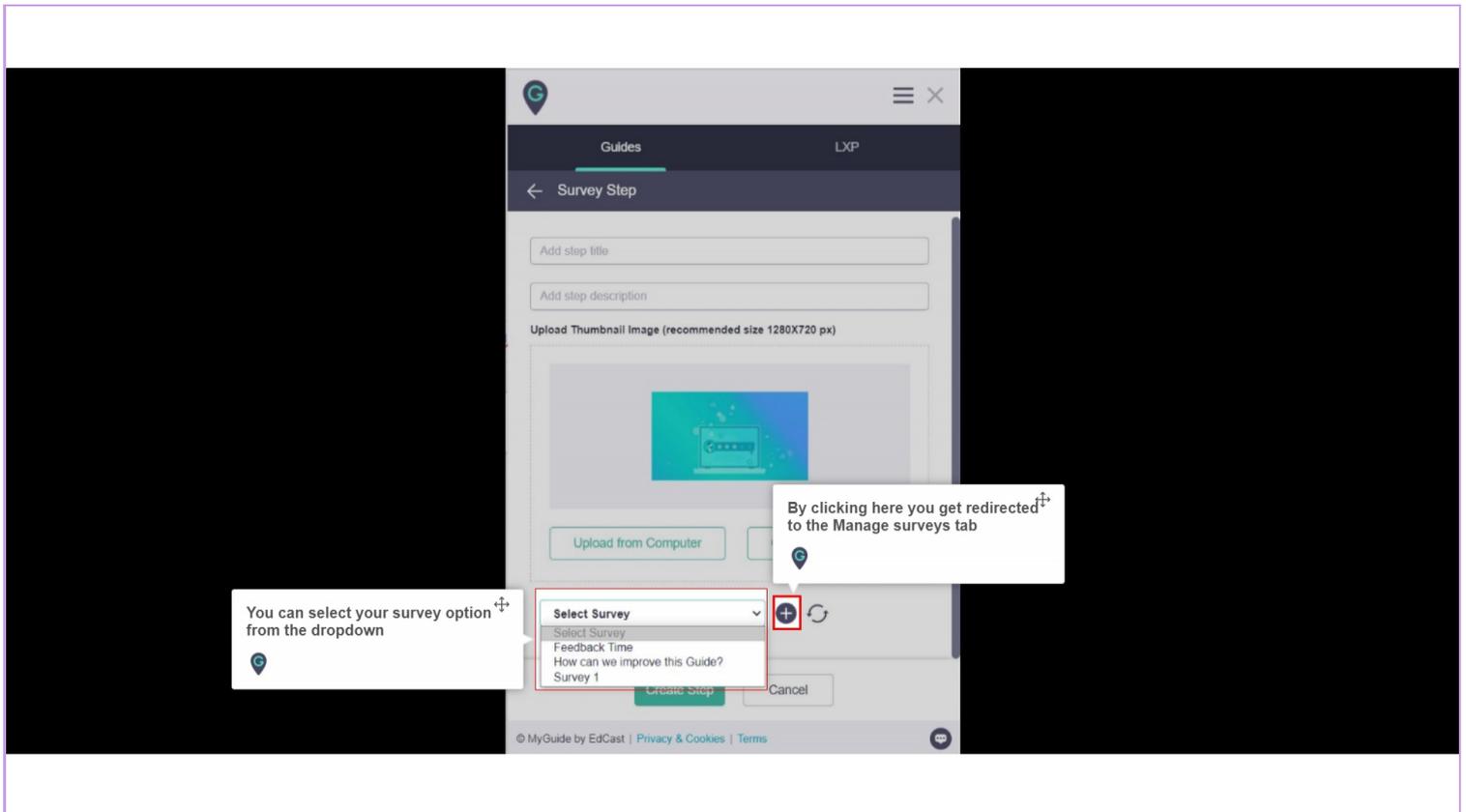
You can add a thumbnail image for the step

1) Click here to select a survey for your step



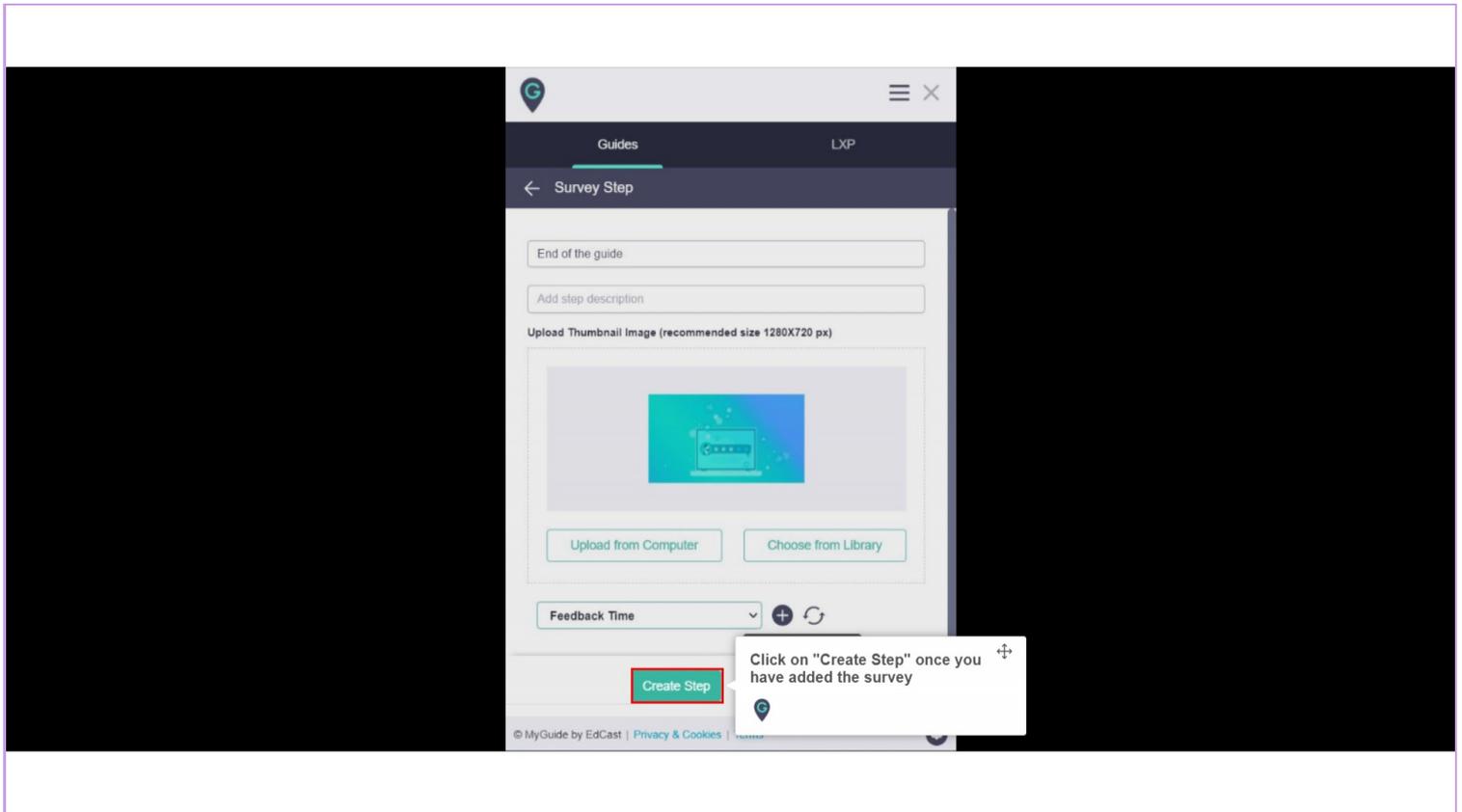
Step: 22

- 1) You can select your survey option from the dropdown
- 2) By clicking here you get redirected to the Manage surveys tab



Step: 23

1) Click on "Create Step" once you have added the survey



Step: 24

We can also add a survey in Tooltip and Tooltip & Validation.

**Please refer to the tooltip support guides to see how it's done.*

Thank you

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