

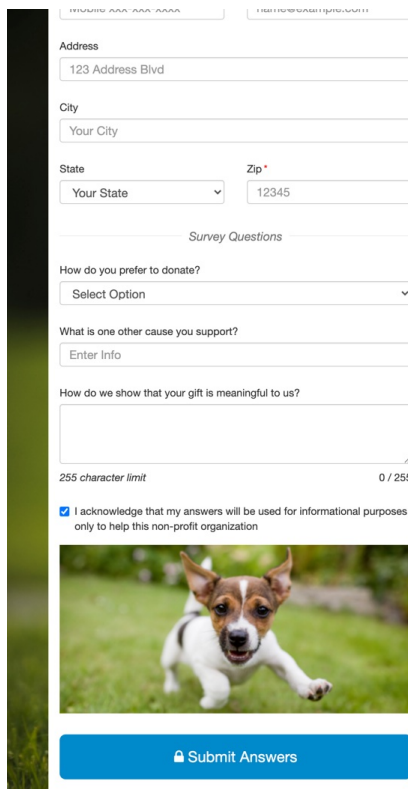
# Survey Activity Design

Last Modified on 09/26/2023 5:07 pm PDT

A survey can help give your supporters a voice; give them an easy, low commitment way to interact with you. Surveys can be used to find out what your supporters thought of an event or what they would like to see from you and more.

As your supporters fill out your survey, you collect their contact information to nurture and cultivate them into a more lifelong supporter.

The basic design is very simple. It can be considered to be based on the Text-to-Donate activity, but this non-payment form is even simpler because none of the payment features are part of the activity. From the basic design, you can any number and style of question based on the different **added Form Elements**.



The screenshot shows a survey form with the following elements:

- Address: 123 Address Blvd
- City: Your City
- State: Your State (dropdown)
- Zip: 12345
- Survey Questions section with three questions:
  - How do you prefer to donate? (Select Option dropdown)
  - What is one other cause you support? (Enter Info text input)
  - How do we show that your gift is meaningful to us? (Text area)
- Character limit: 255 character limit, 0 / 255
- Checkbox:  I acknowledge that my answers will be used for informational purposes only to help this non-profit organization
- Image of a small dog running in a field.
- Submit Answers button.

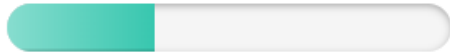


## Create a Survey

To create a Survey, you need to have a Campaign already created. If you do not have a Campaign or want to add this activity to a new one, click on New Campaign to create one and follow the process of creating a campaign, **as outlined here**.

Then create a new activity from the New Activity button on the dashboard on the right or hover your mouse over the Campaign Tile and click on the Plus icon.

# Paws for the Future



RAISED  
**\$11,685**

COLLECTIVE  
GOAL  
**\$35,000**

**24**  
GIFTS

**\$487**  
AVG. GIFTS

In the pop-up, open the **Online Form** section and select **Survey**.

What kind of activity do you want to create?



## Online form

Collect donations, sell tickets, recruit volunteers, and more

[Donation](#)

[Ticketing with QR code](#)

[Registration](#)

[Sponsorships](#)

[Membership](#)

[Volunteer Sign-up](#)

[Survey](#)

[Petition](#)

[Payment Form](#)

[Custom Form](#)



## Texting keyword

Capture texted donations and new subscribers

## Set Up Your Keyword

Keyword

Select existing keyword



Campaign

GiveSmart Fundraise Academy



Shortcode

41444



Alternate Donation Page (if applicable)

Save

1. Either type in a new **Keyword**, or select an existing one to reset and start from scratch.
2. Select a **Campaign**.
  - If you create your activity from the Campaign Tile or within the campaign, it automatically selects the campaign for you.
3. Choose what **Shortcode** you would like to use: 41444 or 91999.
  - The shortcode of your keyword is the phone number that the donor will text your keyword to. We give you two options to choose from. Since all GiveSmart Fundraise customers share the same two shortcodes, keyword possibilities can be limited. This allows there to be two of the same keyword to exist, just on separate shortcodes.
4. Click Save to create your activity and start personalizing it.

[Detailed Set Up Your Keyword Info](#)

## Initial Survey Set Up / Preparation

The Online Form is where you design the survey. This is where you will select what information you collect and how the general experience will feel. As you edit the form, you will see a mobile preview of the changes you make to the right of the editable sections. You can also preview the desktop and tablet views as well.

The Survey only has a few initial sections to design to collect the basic information from your supporters.

# Survey *Survey (default)*

Manage Sections ▾

Logo and Branding

Contact Information

Footer Message

Form Submit

Receipts and Notifications

Embed Code

## Logo and Branding

Change the look of your form with a logo specific to this activity. You can add a background image or color and move the placement of the form on the webpage. You can change the overall color scheme of the form by changing the Button Color by entering a hexadecimal color code, or clicking the color square to use the circle and square to set the color.

Detailed Logo and Branding Info

## Contact Information

Collect the information about your supporters, such as their name, mobile number, email address, and physical address. We highly recommend that you select one or more methods of communication as a required item so you have at least one way to reach out to them later.

Detailed Contact Information Info

## Footer Message

The Footer Message Section is a text box to add any last item before the donor submits their donation. It is not often used, which is why it is hidden by default. Remember to switch it to **Show** if you are using the Footer Message section.

Detailed Footer Info

## Form Submit

The Form Submit section is the last section to personalize on your form that is visible on the form itself. The main function of the Form Submit section is to show the total donation and the SUBMIT button. Change the wording of the button to make it more personal.

Detailed Form Submit Info

## Receipts and Notifications

The Receipts and Notifications section of your form configuration allows you to control the automated communication with your constituents. You can choose to use both texting (SMS) and/or Email. Both forms of notification are enabled by default.

Detailed Receipts and Notifications Info

## Embed Code

Use the code in the Embed Code section to embed the form on a secure webpage on your site.

**Note:** if you do not have a secure webpage and are not looking for one at this time, you can simply link to the form with (preferably) a Sponsor button on your site.

Detailed Embed Code Info

## Personalize Your Confirmation Page

The Confirmation Page thanks your supporters for their answers and provides different calls to action for them. There are only two sections on the Confirmation Page:

- **Content**
  - This is where you can thank your sponsors by name, let them know their answers have been saved, and provide text, images and/or videos to further thank them.
- **Actions**
  - Here, you can add buttons to direct your sponsors to **other** pages, such as a site to upload a logo or include calendar link for them, etc.


Detailed Confirmation Page Info

## Add Survey Question Section

To keep the Survey clean and easy to read and edit, you will likely want to add one or more Survey Question Sections,

1. Click Manage Sections in the upper left
2. Click Add Custom Section

Manage Sections ▾

- Add Custom Section 
- Add In Honor / Memoriam Section
- Add RSVP Section
- Move Section

3. Name your section, for example, "Survey Questions" or "Questions Part 1"
4. Use the Up/Down Arrows on the right to place it where you want it.
  - Some believe asking the questions before collecting the contact information is better, others believe collecting the contact information first so the "easy" questions are out of the way (and you're more likely to collect more contact details) is better. Both methods have merit.
5. Click **Save**
6. There is no limit to the number of sections you can add, so if you have questions grouped by topic, it may be beneficial to have each group in its own section to easily adjust the flow of the questions by **moving the sections**.

## Add Custom Section ✕

New Section Title \*

Survey Questions

Position Your Section

Contact Information  
**<Your New Section>**  
Footer Message  
Form Submit

↑ Up

↓ Down

Cancel

Save

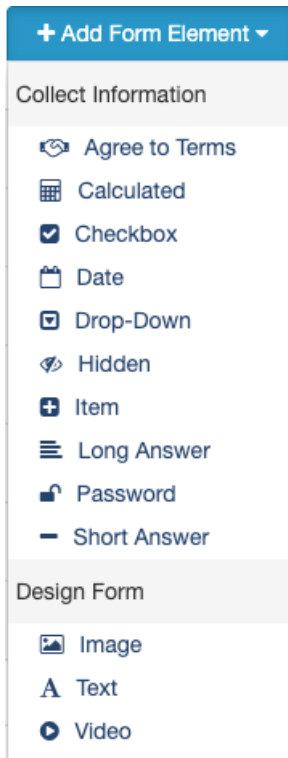
Detailed Add or Manage Sections Info

## Add Survey Questions

Creating Survey questions can be accomplished with the Add Form Element button in the lower right of the section.

While you can create questions using almost any of the Form Elements, the most common types of questions will be:

- **Drop-Down:** This will provide a limited choice for your supporters
- **Long Answer:** This provides an open answer with a maximum of 255 characters
- **Short Answer:** This provides an open answer, but has a maximum of 100 characters. Short Answers can also be set to numbers only, so they will not accept letters if desired.



[Detailed Add Form Element Info](#)

## Survey Question Examples

Surveys can be used to collect just about any kind of information you would like from your supporters: New Supporter details, First Donation, Suggestions for Event Activities, How are we doing, etc. This section will take you through a few examples of question ideas and how to design them.

### Limited Choices (Drop-Down)

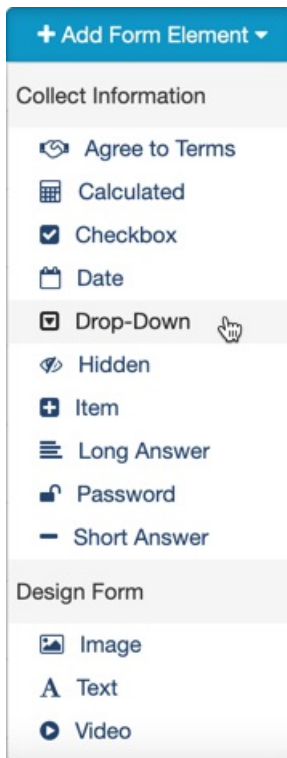
"On a scale of 1-5, how would you rate our Spring Gala?"

"How do you prefer to donate?"

"Which of our initiatives appeal to you the most?"

Providing limited choices provides easy to answer questions for your supporters and easy to analyze results for you. You can accomplish this with a drop-down element.

1. Select the **Drop-Down** element from the Add Form Element menu



2. Use the **Display Label** to ask your question. It has a maximum of 255 characters.
3. You may want to edit the **Reporting Label**. By Default, the Reporting Label will be copied from the Display Label, but that may be longer than you desire when you run a report. **Click the edit** link and make your Reporting Label more succinct.
4. Add choices by typing in an answer on the **Option Label**
  1. By default, the **Option Value** will be copied from the Label. The Option Value is what will appear in the report, so you can adjust the value for a better report as desired.
5. Click **Add New Option** to provide a new choice at the bottom of the list
  - o You can click the + button to the right of a choice to add a new choice in that location
  - o You can click the - button to the right of a choice to remove that choice
  - o You can rearrange the choices by clicking and dragging a choice to another position
6. Click **Save** to complete your question



## Add Form Element - Drop-Down

Display Label ⓘ

How Do You Prefer to Donate?

Reporting Label ⓘ

Donation Preference

Option Label \*

Once with Credit Card

Once with PayPal/Other Online

Once by Check Or Cash

Every Week Automatically

Every Month Automatically

Every Quarter Automatically

Every Year Automatically

Option Value \*

Once with Credit Card

Once with PayPal/Other Online I

Once by Check Or Cash

Every Week Automatically

Every Month Automatically

Every Quarter Automatically

Every Year Automatically

+ Add new option

⬇️ Load options

- Delete all options

Cancel

Save

## Add an Other option with a hidden entry

Drop-Down Form Elements can control Dynamic Actions. If you have choices, but want to provide an open-ended option, such as an "Other" choice, you can include something like a Long Answer so your supporters can enter what they want.

1. Once you have a Long Answer added (see the Long Answer Question below for its design), click on the **Dynamic Action** icon by the Drop-Down in your list.

The screenshot shows two form elements in a list. The first element is labeled "Donation Preference" and is a "Drop-Down" type. It has a "Show" toggle that is turned on (green) and a "Required" checkbox that is unchecked. A red arrow points from the "Dynamic Action" icon (a person with a plus sign) to the right of the "Drop-Down" element. The second element is labeled "Other Donation Preference" and is a "Long Answer" type. It also has a "Show" toggle that is turned on (green) and a "Required" checkbox that is unchecked. Below the "Long Answer" element are icons for edit, add, copy, and delete.

2. Select your Other choice for the **Select Value** next to the word **is**.

3. Click the 0 Elements Selected and scroll down to find and check the Long Answer Element you created to work with this Other choice.

## Setup Dynamic Action - Drop-Down ✕

**When** Donation Preference

is  show

[+ Add new value](#)

1 Element Selected

1 Element Selected

Street Address

City

State

Zip

**Survey Questions**

Other Causes

Meaningful

Other Donation Preference

[Reset Action](#) [Cancel](#) [Save](#)

4. Click Save.

Now the box to answer that other choice will be hidden unless the Other option on the Drop-Down has been selected:

City

Your City

State

Your State

Zip\*

12345

### Survey Questions

How Do You Prefer to Donate?

Select Option


What is One Other Cause You Support?

Enter Info

How do we show that your gift is meaningful to us?

255 character limit

0 / 255

 Submit Answers

## Asking Questions with a Short Answer or a Numerical Answer

"What is one other cause you support?"

"Rate your donor experience in one word."









"What is your preferred method of communication?"

The Short Answer Element can be used to provide a single line of text for your supporter to enter (up to 100 characters), making it great for single response answers.




1. Select the **Short Answer** element from the Add Form Element menu

+ Add Form Element ▾

Collect Information

-  Agree to Terms
-  Calculated
- Checkbox
-  Date
- Drop-Down
-  Hidden
-  Item
-  Long Answer
-  Password
- Short Answer 

Design Form

-  Image
-  Text
-  Video

2. Use the **Display Label** to ask your question. It has a maximum of 255 characters.
3. You may want to edit the **Reporting Label**. By Default, the Reporting Label will be copied from the Display Label, but that may be longer than you desire when you run a report. **Click the edit** link and make your Reporting Label more succinct.
4. If you are looking for a number, (rate us on a scale of 1-10), then you can put a checkmark by **Number?**
  1. Note: If you select Number, the Short Answer will still take anything up to 100 characters. Checking the Number option limits the responses to only being able to enter numbers. While not usually useful for a Survey, this could be important if you are using the Calculated Element in your forms.
5. Click **Save**.

## Add Form Element - Short Answer ✕

Display Label 

What is One Other Cause You Support?

Reporting Label 

Other Causes

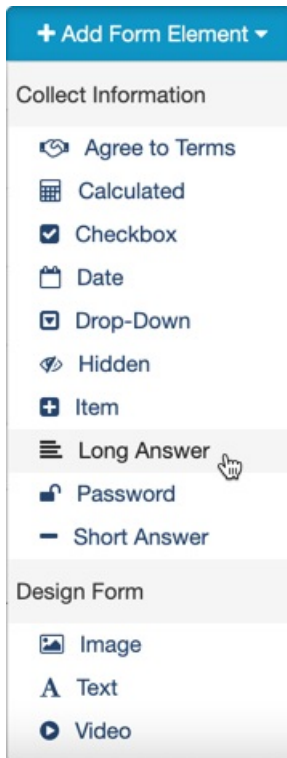
Number? This will make the entry calculable

Cancel

Save 

## Asking Questions with a Longer Answer

1. Select the **Long Answer** element from the Add Form Element menu



2. Use the **Display Label** to ask your question. It has a maximum of 255 characters.
3. You may want to edit the **Reporting Label**. By Default, the Reporting Label will be copied from the Display Label, but that may be longer than you desire when you run a report. **Click the edit** link and make your Reporting Label more succinct.
4. Click Save

### Add Form Element - Long Answer x

Display Label ?

How do we show that your gift is meaningful to us?

Reporting Label ?

Meaningful

Cancel

Save

## Other Elements to Consider



























**Checkbox:** Consider adding a checkbox for your supporters to acknowledge how their answers will be used. This can also be handled with an Agree to Terms element if you want to provide a link to your terms and conditions page on your website.

**Images and Videos:** Surveys tend to be long lists of just words and boxes to fill in. Consider making your survey more interesting by including images and/or videos to break up the monotony of the questions.

Remember, shorter forms tend to get completed more often than longer forms, so consider limiting your questions to the absolute essentials so your supporters don't just give up halfway through your survey.

Continue to add survey questions, images, instructions and inspirations to complete your survey.

### Survey Questions

<b>Section Heading</b> 		
<input type="text" value="Survey Questions"/>		
<b>Donation Preference</b> Sets: 1 Element	<b>Drop-Down</b> <b>Dynamic</b>	<b>Show</b> <input checked="" type="checkbox"/> <b>Required</b> <input type="checkbox"/>     
<b>Other Donation Preference</b> Set by: 'Donation Preference'	<b>Long Answer</b> <b>Dynamic</b>	<b>Show</b> <input checked="" type="checkbox"/> <b>Required</b> <input type="checkbox"/>    
<b>Other Causes</b>	<b>Short Answer</b>	<b>Show</b> <input checked="" type="checkbox"/> <b>Required</b> <input type="checkbox"/>    
<b>Meaningful</b>	<b>Long Answer</b>	<b>Show</b> <input checked="" type="checkbox"/> <b>Required</b> <input type="checkbox"/>    
<b>Acknowledgement</b>	<b>Checkbox</b>	<b>Show</b> <input checked="" type="checkbox"/> <b>Required</b> <input type="checkbox"/>     
<b>Flare</b>	<b>Image</b>	<b>Show</b> <input checked="" type="checkbox"/>   

[+ Add Form Element](#)

## Reporting and Stewardship

You will need to run reports to view the collected information from your form so that you can

cultivate the relationship with your Supporters.

How to Run a Report

And now your Survey is ready to go!

12345 67890 12345 67890 12345 67890 12345 67890

Address  
123 Address Blvd

City  
Your City

State  
Your State

Zip  
12345

Survey Questions


How do you prefer to donate?  
Select Option

What is one other cause you support?  
Enter Info

How do we show that your gift is meaningful to us?

255 character limit 0 / 255

I acknowledge that my answers will be used for informational purposes only to help this non-profit organization



Submit Answers

