

Create a Survey Activity

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Surveys are great ways to engage your supporters. You can personalize your surveys to find out why your supporters are interested in your organization to tailor your communication campaigns and much more.

Surveys are generally designed in two parts and then the results are found when you run a report.

Section 1 - Everyday Form Design

Most GiveSmart Fundraise forms use the same designs as you are building them, from the Logo and Branding sections to the Submit button. When designing your Survey, the same structure applies. Since these are standard, you can usually complete these sections quickly, to then allow you to get into the more personalized design items in Section 2 below.

To start, Create a New Activity and select **Engagement** > **Survey**.

Create New ×

-  Fundraising Activity
-  Event Activity
-  Engagement Activity
 - Volunteer Signup
 - Survey
 - Petition
 - Membership
 - SMS Subscription
 - Payment Form
 - Custom Form

Step 1 - Activity Setup

Set up the initial settings in the Keyword page. For detailed information on this step, [click here](#).

Step 2 - Logo and Branding

Prepare the general look of your Survey with the Logo and Branding section. For detailed information on this step, [click here](#).

Step 3 - Contact Information

Select which personal information you would like to collect from your supporters.

With surveys, you may wish to hide everything in the Contact Information section so you can support anonymous surveys. Or maybe just include geographic or data, like city or zip code, gender, etc.

Step 4 - Footer Message

Add a footer message if you desire. Remember, the Footer message is hidden by default, so if you want a footer, you do need to switch it to Show.

If you are creating an anonymous survey, the footer message might be a good place to provide language about it being anonymous.

Step 5 - Form Submit

Change the button from Submit to anything you like and configure the email receipt if you are collecting your supporters' emails, so it is worded correctly for your Survey.

Step 6 - Social Media Settings

When someone completes your survey, they will be taken to the thank you page as shown in the Mobile Experience section on the left. The thank you page contains Social Share buttons for Facebook and Twitter. If you wish to change the wording of those share messages your supporters will see to share, you can change them from the Social Media Settings section on the left column.

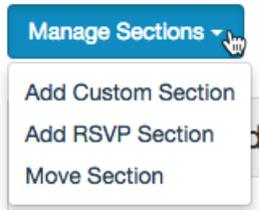
Section 2 - The Survey

Your style of survey may vary with all different kinds of questions. Whether they are multiple choice with a single answer using **Drop-down menus** or multiple answers using **Checkboxes**. You can have freeform answers with either a simple short response using a **Short Answer** text box, which also allows you to limit the answers to numbers, or a longer response using **Long Answer**. You may even collect a **Date**, such as a birthdate or other significant event to your supporters.

Best Practices - Use Several Custom Sections

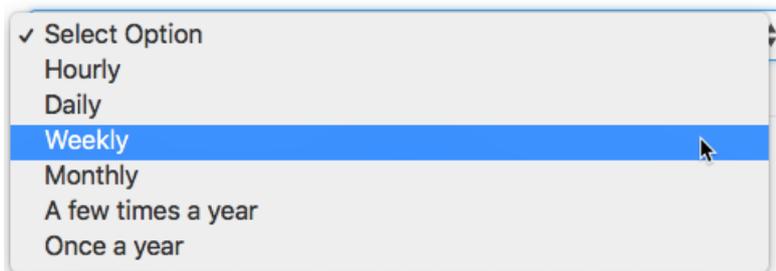
Because you will likely be creating multiple questions, to give yourself the most options, it is recommended to create a new section for each question. That way, if you decide to change the order of the questions, you simply need to move that section where you would like it.

To create a Custom Section, select the Manage Sections button at the top of your form and choose Add Custom Section.



Drop-down Menu

2. How often do you hear from MobileCause Academy? (Select one)



The Drop-down allows you to give your supporters the "Choose One" type question. The Reporting label of the Drop-down will be the name of field you collect in your Reports.

Pro Tip: If you want to have a long description about the question with the drop down, you can first put in a Text element, then add your Drop Down Menu.

Checkbox

If you want your supporters to choose multiple items from a list, you can use a series of Checkboxes. Note that the question here is done with a Text element, and each answer is its own Checkbox entry. This means, on your report, it will show each checkbox in its own column.

Q1	Custom Message	Show <input checked="" type="checkbox"/> Required <input type="checkbox"/>	 
1a. Technical Know How	Checkbox	Show <input checked="" type="checkbox"/> Required <input type="checkbox"/>	 
1b. Strategy Ideas	Checkbox	Show <input checked="" type="checkbox"/> Required <input type="checkbox"/>	 
1c. Training programs	Checkbox	Show <input checked="" type="checkbox"/> Required <input type="checkbox"/>	 

Short Answer

You can use the Short Answer option for short answers, such as numbers or single word answers. If you set the Short Answer to be a number, and your supporter types anything other than a number, it will give your supporter an error, stating to "Please enter a valid number."

Long Answer

5. What else would you like to tell us?

255 character limit

0 / 255

Occasionally you just want to hear from your supporters and give them a vehicle to describe something to you. You can give them this capability with the Long Answer. The Long Answer does have a maximum of 255 characters.

Date

6. Birthdate

mm/dd/yyyy ▼

March 2018 ◀ ● ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

The Date field allows you to enter a complete Date (Month, Day, Year). If you wish to only collect

the year, for example, you would more likely just want to use a Text Box:

What year were you born? (e.g. 1975)

Section 3 - Collecting Results

You have now designed your Survey. Now it is time to review your data. You would do this by running a report with the various fields you've created in your survey. For more detailed information on running reports, [click here](#).

The quick steps for Reporting on your Survey are here:

From the left navigation, select **Existing Reporting > Search Transactions**

On the Filter page, make sure to select **Non Payment**.

Transaction Type

Credit Card

Paypal

Offline ?

Non Payment ?

Collected

Pending

Refunded

Voided

Collected

Refunded

Further filter by **Date** and by **Keyword**.

When you **Export** your data, select your questions and click **Download**.

Available Column Fields

- Form ID
- Fulfillment Calls
- Fulfillment Texts
- Donation notes
- Account
- Account ID
- Campaign name
- Account Plan
- Account Plan Price
- Frequency
- Anonymous
- Billing transaction
- Billing transaction reference
- Billing response code
- Parent Name
- Payment Gateway
- What Year Were You Born? (E.G. 1975)
- 2. How Often Do You Hear From Mobilecause Aca
- Based On The Descriptions Above, Which Of Mob

Select All

Selected Column Fields

- 1a. Technical Know How
- 1b. Strategy Ideas
- 1c. Training Programs
- 2. How Often Do You Hear From Mobilecause Aca
- 3. How Many Times A Month Do You Go Into The
- 4. Where Do You Normally Access Mobilecause?
- 5. What Else Would You Like To Tell Us?
- 6. Birthdate

Up

Down

Download

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