

## Quick Start Guide To:

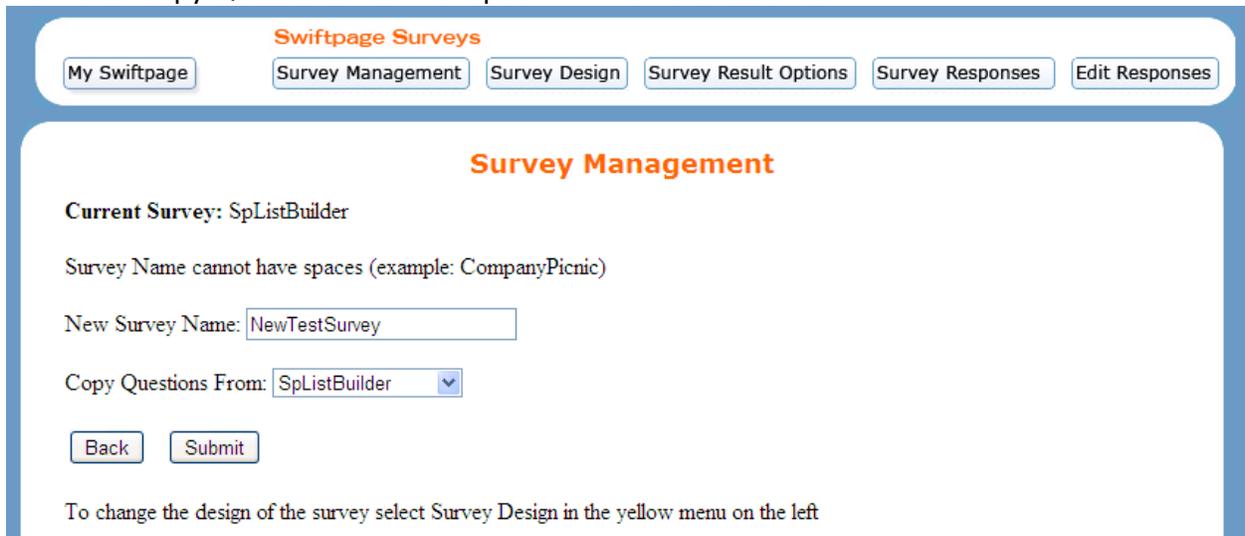
### Creating Surveys

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

1. Log into the My Swiftpage 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.



The screenshot shows the 'Survey Management' page. At the top, there is a navigation bar with buttons for 'My Swiftpage', 'Survey Management', 'Survey Design', 'Survey Result Options', 'Survey Responses', and 'Edit Responses'. Below this, the page title is 'Survey Management'. The current survey is identified as 'SpListBuilder'. A note states 'Survey Name cannot have spaces (example: CompanyPicnic)'. There is a text input field for 'New Survey Name' containing 'NewTestSurvey'. Below that is a dropdown menu for 'Copy Questions From' with 'SpListBuilder' selected. At the bottom of the form are 'Back' and 'Submit' buttons. A footer note says 'To change the design of the survey select Survey Design in the yellow menu on the left'.

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

### Survey Design

Current Survey: SpListBuilder

- |         |   |   |
|---------|---|---|
| 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: SpListBuilder

**Autoresponder - email acknowledgement**

**Autoresponder - Drip Marketing Autoloader**

**ACT! Database Update**

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

List Updater – This survey will be used to update existing contacts in my ACT! Database.

**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 Swiftpage’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 My Swiftpage 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 Swiftpage template.