How to Guide
How to Create Mobile Surveys and Forms
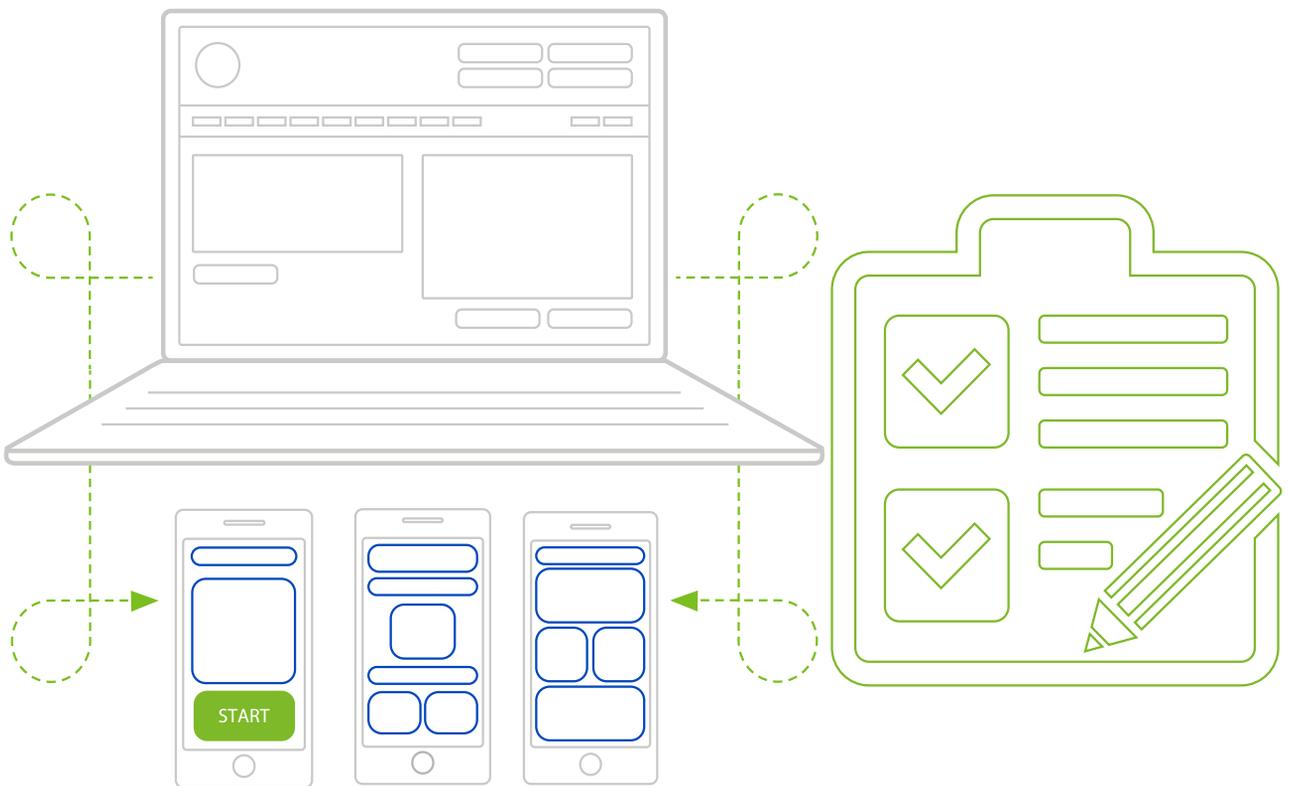
Contents

Getting started

You've created your Textlocal account, now you're ready to start creating mobile surveys and forms to include in your SMS campaigns.

Mobile forms have risen in popularity, as a real alternative to paper-based and email forms. They offer a simple way for recipients to complete your form while offering a reliable way to deliver and report on them. This guide covers everything you need to know about creating mobile surveys and forms, to improve overall engagement and response when collecting information from your customers and contacts.

An introduction to surveys and forms

Textlocal's surveys and forms tool lets you create and send mobile optimised web surveys, complete with a range of data capture tools. Like mobile web pages, surveys can be sent using a short link within your text message, so they are easily accessible by anyone with a smartphone.

Mobile forms can be a simplified version of a desktop web form, without the distraction of adverts and promotions, or a completely different version with a simpler and cleaner interface.

Why mobile surveys and forms?

This is an easy way to gather information directly from your customers, and its optimised for mobile so it's easy to complete. When the survey or form is submitted, the responses are stored immediately in your Messenger account.

But that's not the only benefit:

- There's no cost to receive replies

- You can create surveys and forms for free – and as many as you need

- All the response data can be easily exported to Microsoft Excel for in-depth analysis

- It's a low cost format compared to other popular survey and form tools

- You can use custom fields to personalise your survey or form for each recipient – to encourage a better response

- The success of text messaging will drive an increase in open and response rates.

Example uses

Surveys and forms can benefit any business. If you need to collect information from your customers, it makes sense to include surveys and/or forms as part of your ongoing communications. Here are a few ideas from our customers:

Applications

- Loan applications

- Insurance claims

- Educational courses

- Contracts

Surveys

- Customer feedback surveys

- Opinion polls

- Content for thought leadership papers

Registrations

- Brochure downloads

- Newsletter sign-ups

- Register for a gym class

- Training course registrations

- Newsletter sign-ups

Competitions

- Entry forms including multiple choice questions and free text fields

Creating a mobile survey

Step 1

Log into your Textlocal account and click 'Surveys' on the top navigation bar.
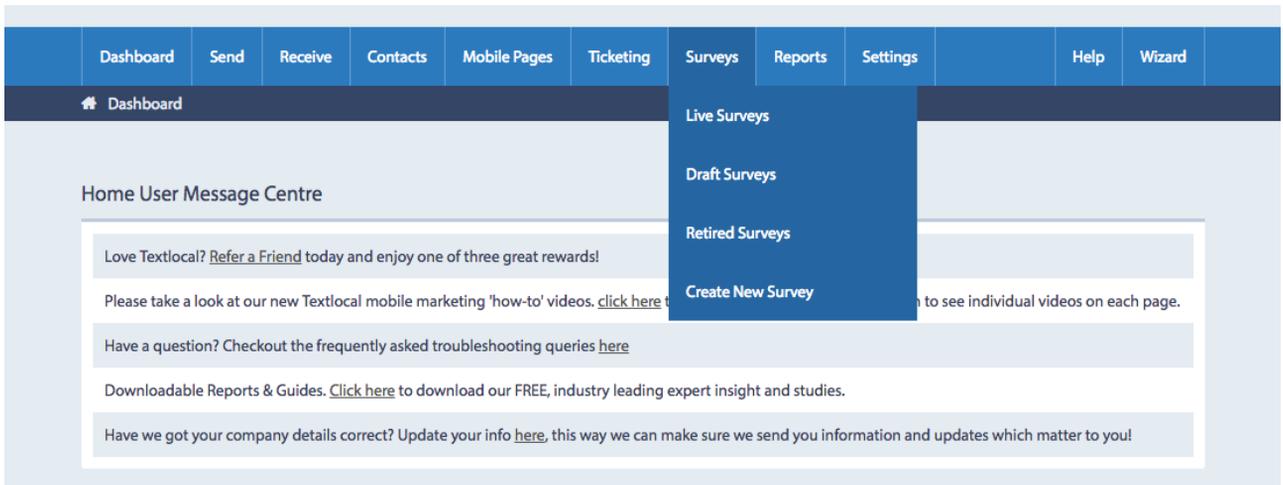
Step 2

Select the survey you want to launch or start a brand new one.

Live Surveys – these are currently live and being completed.

Draft Surveys – these are surveys that you have started to build but not published.

Retired Surveys – these are expired and can no longer be completed.

Create a New Survey – build a brand new survey.

Setting up your mobile survey

This allows you to give your survey a title and set any time sensitive parameters. You can always come back to this section, so don't worry if you need to change something later on.


1. Give your survey a title. This will appear at the top of the page.

2. This is a descriptive name, primarily used for your reporting. Keep it simple but make it clear what the survey is for.

3. If you don't want recipients to complete your survey more than once, select 'OFF'. This typically applies if you're running a competition where recipients can only submit their answers once.

4. If your survey is time sensitive, enter a start and expiry date. If you add an expiry date, you can also set up the message that will be displayed if a participant tries to complete the survey after it has expired.

5. Always remember to save your settings.

Setting up your survey pages

This page is home to everything you need to create a survey and you can create as many as you need.
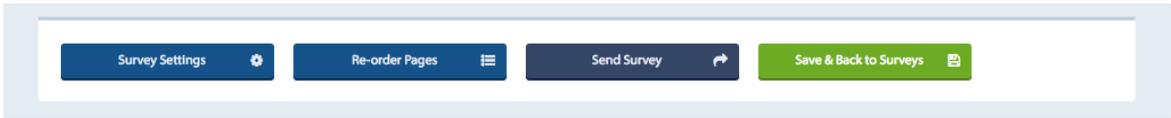
The top four boxes let you navigate through existing surveys, change any settings, re-order any pages and send a survey once it's complete.

If you choose to re-order the pages in your survey, a pop-up box will open where you can 'drag and drop' the pages into the correct order.
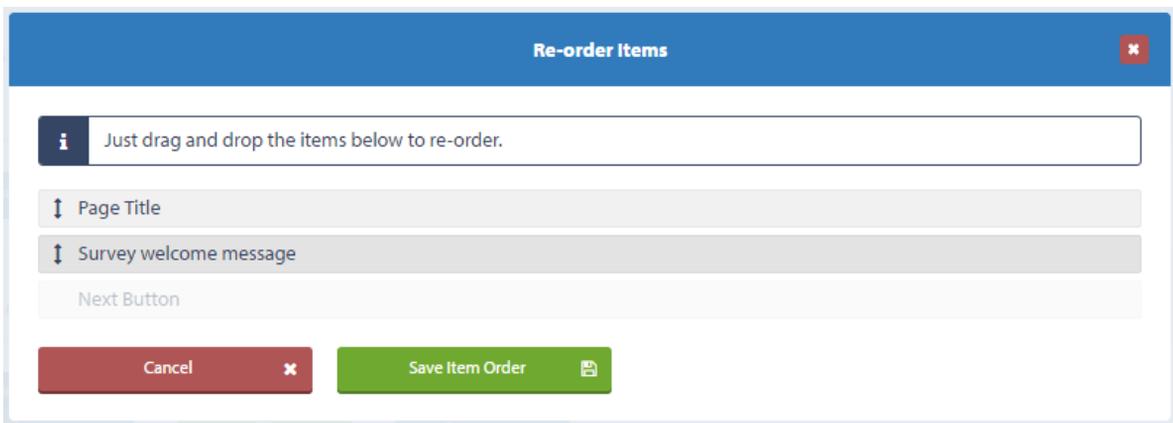
These three sections below are a critical part of building your survey. Add as many pages as your survey needs, or keep it simple with a single page and submit button.
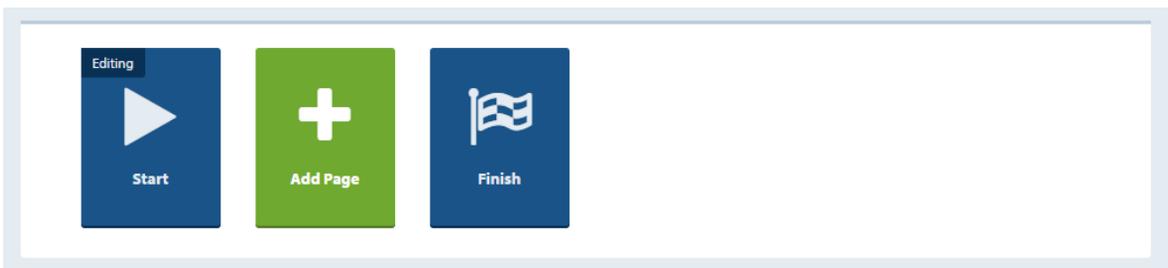
Creating the page content

The image below displays a blank template for a survey page. The title and welcome message elements are optional so can be removed. You can customise your survey by adding new elements – just click 'add item to page'.

Use 'Re-order items' to put the elements in the correct order.

'Preview Page' lets you see exactly what your page will look like on an iPhone or Samsung device (this is also an indication of what it will look like on any smartphone).

'Start Survey' can be renamed if required. Alternative ideas include 'Continue,' 'Submit' or any other call-to-action that fits with your survey.

Page / Item Settings ?

Add Item to Page +   Re-order Items ☰   Preview Page 👁

Page: Start ?

Page Title (Biggest Size Title)   Remove 🗑 | Edit ✏ | Copy ⎗

Survey welcome message   Remove 🗑 | Edit ✏ | Copy ⎗
(Text Display Paragraph)

General Text Display

Next Button (Button)   Edit ✏

Start Survey
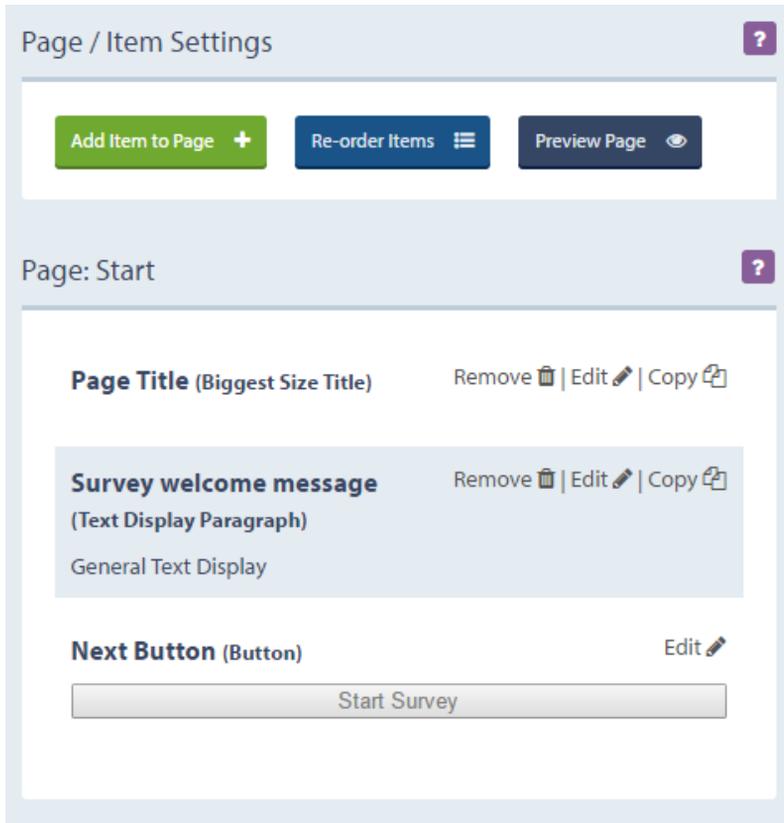
Adding elements to your survey pages

An element could be a header, an image or a form that you add to your survey. By clicking 'Add item to page' you will see the options available.

DISPLAY ITEMS

Title	Title	Title	Text

Image
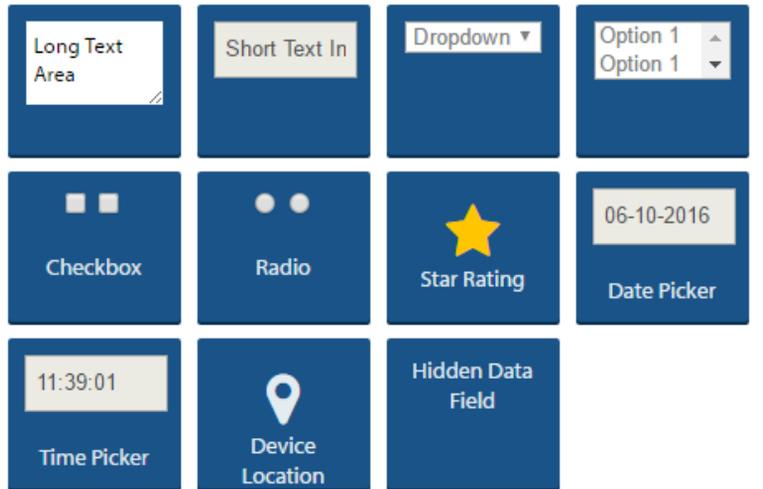
DATA CAPTURE

Long Text Area	Short Text In	Dropdown ▼	Option 1 / Option 1

Checkbox	Radio	Star Rating	06-10-2016 Date Picker

11:39:01 Time Picker	Device Location	Hidden Data Field

Display items

- **Title** – use this option to add a title or header, selecting the size you want the text to be.

- **Text** – add text to your existing elements, or alter the existing text.

- **Image** – upload an image to Messenger and select where you want this to appear on the page.

Data capture

- **Long text area** – use this element for free text responses.

- **Short text area** – for standard length responses.

- **Dropdown** – lets respondents select their answer from a pre-populated drop-down list.

- **Options** – include this element where you want to offer multiple choices.

- **Checkboxes** – use this element if you want respondents to select more than one answer.

- **Radio buttons** – use this element if you only require one answer.

- **Star rating** – use 5 or 10 stars to canvas opinion. Select how many stars you want pre-filled.

- **Date picker/time picker** – select specific dates and times using simple scroll-through selectors.

- **Device location** – select this element if you need participants to include their current location.

- **Hidden data field** – use this element if you want to add any unique reference data against each response. This could be a campaign reference; content will be hidden from the respondents.

Hints & Tips

- If you choose to add an end date when setting up your survey, make sure you include a description to give the respondent a polite reminder that the survey has expired.

- Think about how you want to retrieve the information from the survey. Do you want respondents to give a unique answer or select a response from a drop-down list? Remember check-boxes allow respondents to select multiple responses.

- Let your respondents know which questions are mandatory. If you need their email address to follow-up on completed surveys, make it a compulsory field.

- Personalise your survey using custom fields.

- Using multiple pages rather than scrolling down a mobile screen will give respondents a better experience. If you're using multiple pages, don't forget to include the total number of pages your survey has, so respondents know how close they are to completing it.

- Make your survey admin and reporting easier by naming the pages and elements logically.

- Use the 'Copy' function to quickly copy images and logos to other pages, rather than re-uploading content.

- Copy an existing survey if you want to run duplicate versions, otherwise you will have a completely different set of results.

- When using the star rating element, it will default to 3 out of 5 stars. If respondents choose not to submit a rating, the results won't be noticeably skewed.

Survey Logic

If you have Survey Logic activated on your account, you can add another dimension to your SMS surveys and forms.

What is Survey Logic?

With Survey Logic you can tailor your survey or data capture form, and send respondents to relevant survey pages, based on their responses to previous questions.

For example: Owner of a hotel chain wants to gather customers' feedback on their facilities. Not every hotel has the same facilities; Hotel 3 does not have a café so respondents in Hotel 3 are not shown the questions relating to this facility.

Question 1: Which hotel did you visit today?

Hotel 1

Hotel 2

Hotel 3

Question 2: Did you visit our café?

Yes

No

Question 3: Please give us some feedback on your café visit.

Question 4: Did you visit our spa?

Survey continues
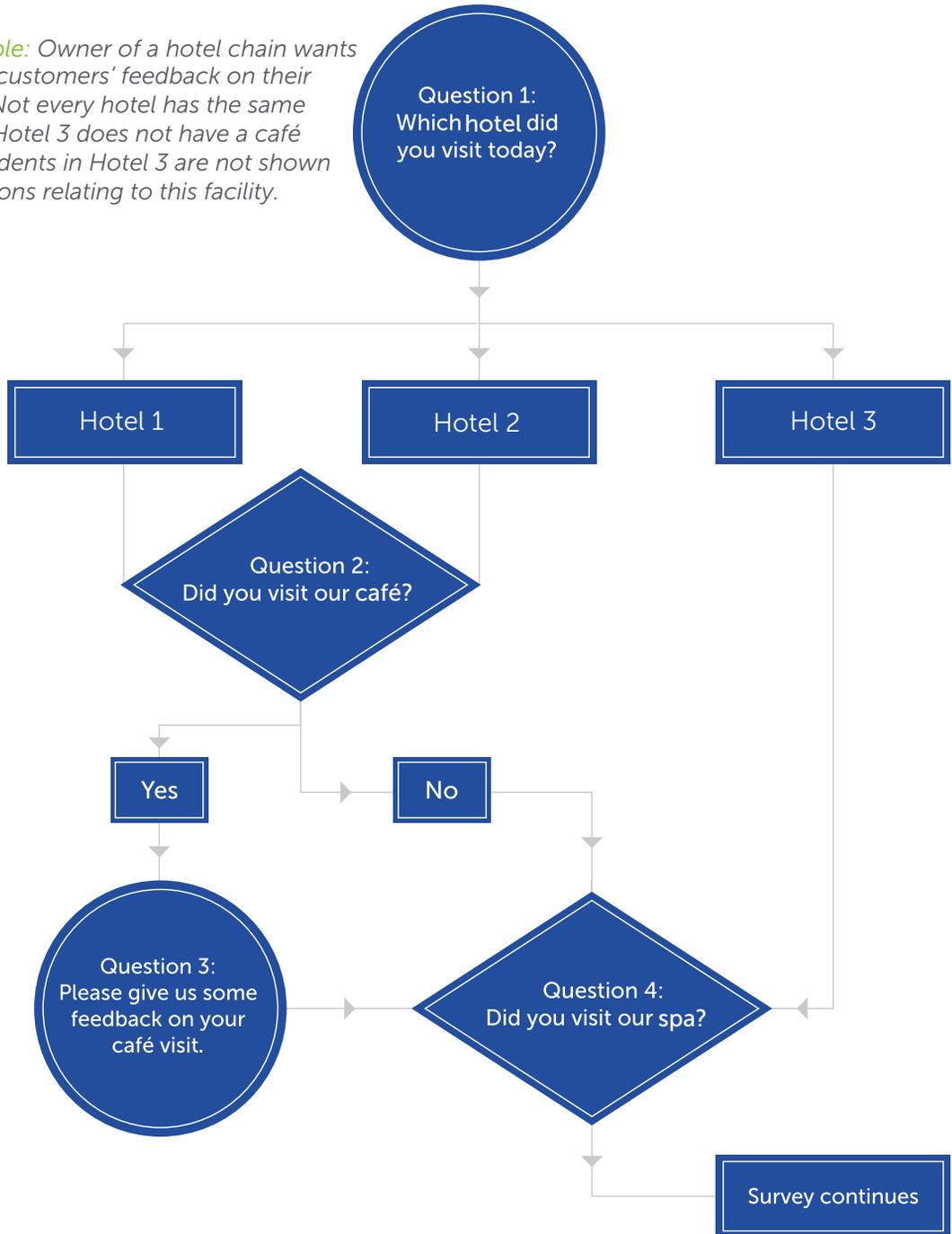
Conditions and actions

Textlocal uses **Conditions** and **Actions** to build this logic into surveys.

If the respondent does something (the condition)... then do something in the survey (the action)

If the survey respondent visited the Hotel 1 or Hotel 2...	...then ask them if they visited the café
If the survey respondent visited the Hotel 3...	...then skip the café question, and ask if they visited the spa

There are a number of pre-configured conditions and actions in Textlocal:

Conditions	Actions
Answer is...	Jump to page
Answer is not...	Skip page
Question is blank	Finish survey
Question is complete	

Using these conditions and actions, along with the survey pages you have built, you can create logic-driven surveys and forms.

Textlocal Tip
Build all your pages before you start adding in your logic. This makes it easier to plan your customer journeys.

How to add logic to your surveys

Logic can be added to any data capture fields with fixed responses, such as:
- Single choice drop-downs
- Multiple choice lists
- Checkboxes
- Radio buttons
- Star ratings

If logic is available for a particular question, you will see a small cog symbol.

Page: Hotel

WhichHotel (Single Choice Radio Button)

Which hotel did you visit today?
- Hotel 1
- Hotel 2
- Hotel 3

Next Button (Button)

Start Survey

Click here to create your logic

Create Logic +

Discard Changes ✖   Save Item 💾

Click this gear icon, and then Create Logic to build your logic for this question.

Give your logic a name, such as Hotel Visit, and select your condition from the drop-down list. Use Condition, Answers, Action, and Page to build your logic.

WhichHotel

Hotel = Hotel 1 (or) Hotel 2

Logic Name:	Hotel = Hotel 1 (or) Hotel 2
Condition:	Answer is …
Answers:	☑ Hotel 1
	☑ Hotel 2
	☐ Hotel 3
Action:	Jump to page
Page:	Cafe Visit - Q

Create Logic +

Discard Changes ✖   Save Item 💾

WhichHotel

Hotel = Hotel 1 (or) Hotel 2

If **Answer is** Hotel 1, Hotel 2, then **Jump to page** Cafe Visit - Q

Hotel = Hotel 3

Logic Name:	Hotel = Hotel 3
Condition:	Answer is …
Answers:	☐ Hotel 1
	☐ Hotel 2
	☑ Hotel 3
Action:	Jump to page
Page:	Spa Visit - Q

Create Logic +

Discard Changes ✖   Save Item 💾

If you would like to add Survey Logic to your account, contact your account manager, or our Customer Service team on 040-3085-8602.

Sending your Survey

Surveys and forms are accessed via a short link in a text message, so it's a similar process to sending a basic text message. To find out more, please see our guide 'How to send bulk SMS texts'.

There are two ways to send a mobile survey using Messenger; either directly from the survey creation tool or via the 'Send SMS' page.

Send a survey using the survey creation tool

Once you've built and tested your survey, click the 'Send Survey' tab along the top of the page. If you've set a start date for publishing the survey, you will be prompted to publish it before you send it.

Once published, the link to the survey will appear in the text message field, complete with a tracking link so you can track who opens your message and the device type.


Now all you need to do is complete your text message, choose your sender name, add an opt-out path (recommended) and select a contact group.

If you need help building your contact lists, read our guide 'How to create a contact list'.

Manually insert a survey link into a text message

From the 'Send SMS' page, click on the 'survey' icon below the text box. A drop-down list will appear showing all of your published surveys. Select the appropriate one.
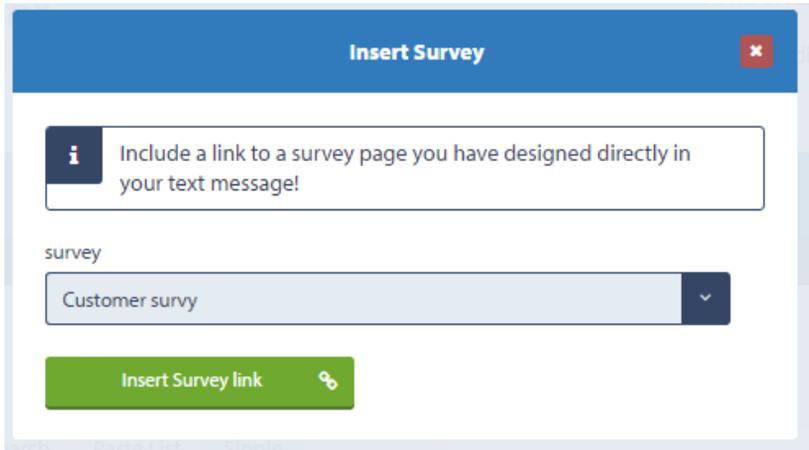
Never send a text message that just contains a link. Make sure you explain what the link does, what action you want the recipient to take and what's in it for them. Include an additional call to action in case the end user doesn't have a smartphone.
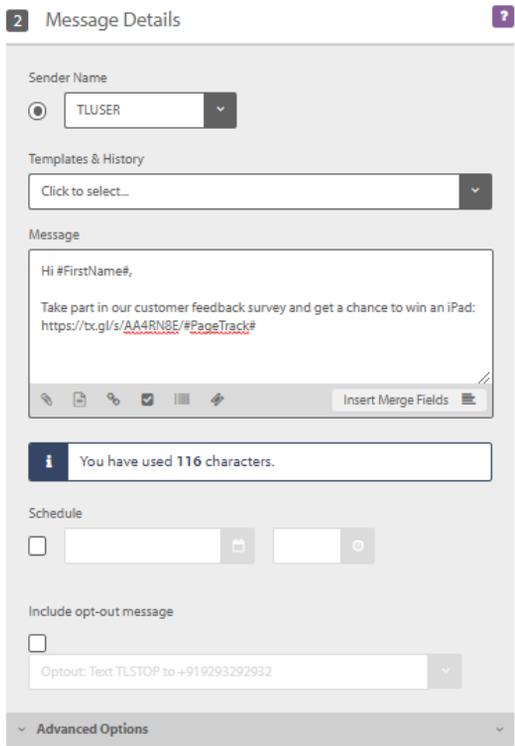
Reporting on sent surveys

All the results from your completed surveys will be stored in your Messenger account, just click the 'pie' symbol next to the survey you want to analyse.

Textlocal customer survey 2016	Immediate		to	Never	161	64					
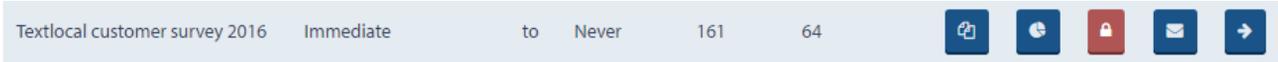
Select the date range you want to review and the related results will be displayed. Messenger's reporting function includes:

- The individual responses to each question, displayed in graphs and charts

- The ability to export the data to Microsoft Excel for in-depth analysis

- Statistics on the mobile device used and screen resolution.

This is how the results to the star ratings will be displayed:

What your reports look like

Your survey results are displayed in different chart types, so you can select the one that best suits your need. You can also create your own charts and pivot the data if you export the file to Microsoft Excel.
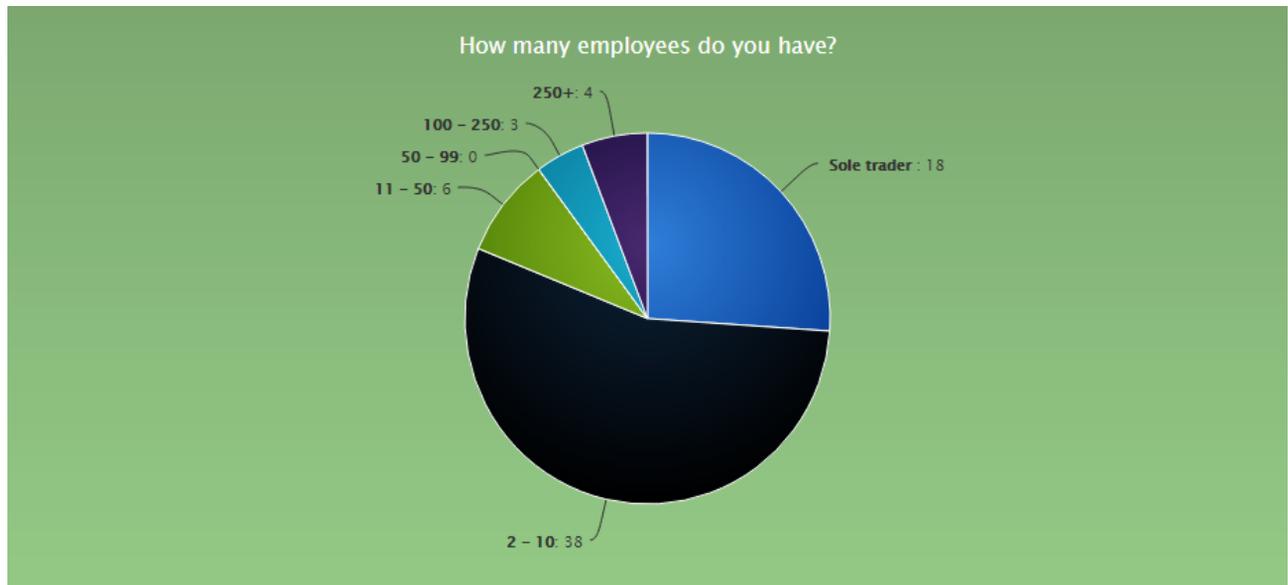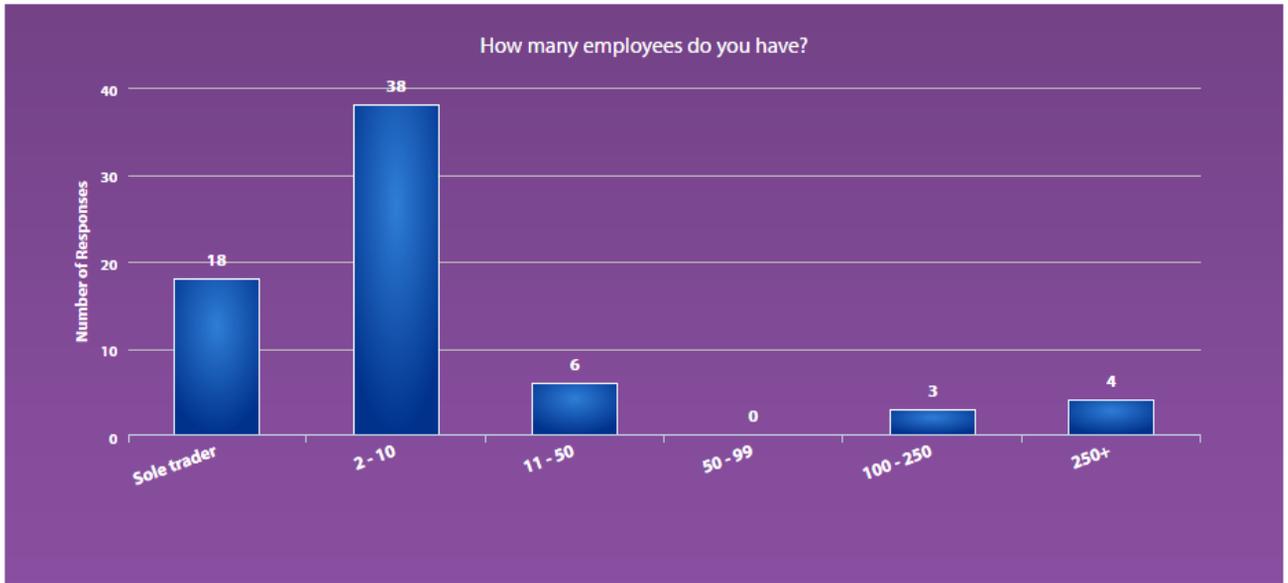
Survey Pricing

There are two payment options available; inclusive of when sending survey links to suit your usage. Both options include the cost of sending the text message.

Pay-As-You-Go

With this option, you pay for every survey you send out. All completed surveys are collected, free of charge for up to 3 months after the send date. The costs below include the cost of sending the text message.

Survey construction: FREE – design as many surveys as you wish need.

Survey text cost: Two SMS credits per survey sent. If you use more than 160 characters an additional two credits will be charged.

Responses: these are FREE with – data is available in Messenger for three months after the send date.

Subscription Pricing

With a subscription, you can send as many surveys as you like at the same cost of an SMS. All survey results are stored separately. Responses are collected and archived in Messenger for as long as your contract is live. For more information, please contact sales@textlocal.in.

Managing your opt-outs

We strongly advise including an opt-out message on all outbound texts, e.g. 'text STOP to 56263'. Messenger has inbuilt functionality which automatically removes any mobile numbers which have opted-out from your contact list, so you don't have to do anything. This gives peace of mind, knowing that you can't send a message to someone who has opted-out.

By ticking one box, Messenger will add an 'opt-out' path to your messages. This gives a simple instruction to the recipient on what to do if they would like to remove themselves from your contact list, so they no longer receive any messages from you. The number will stay on the opt-out list until the owner chooses to opt back in.

Include opt-out message

☑ | Optout: | ⌄

Messenger will cleanse the contacts you upload, stripping out any numbers which have previously opted-out of your messages. You can also manually add opt-out contact numbers to the list – perfect if a customer contacts you directly with an opt-out request.

Your data is safe with Textlocal

We understand how important your contact data is to you and to your business. At Textlocal, we comply in the way we handle all consumer data. We will not pass on any of your data to any third parties, keeping it confidentially, secure and in compliance with the Data Protection Act 1998.

For further information, please view our SLA and Privacy Policy

Need more help?

If you need any further help or guidance using Messenger please contact our dedicated support team on +91 95021 95021 or support@textlocal.in or visit our website www.textlocal.in for more help and support.

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