How to setup and customize a survey.

Steps to creating customized Surveys:
Log into the control panel at http://login.velaro.com .
Create a new survey:
1. Go to Surveys > Edit
2. On the left menu select Create New Survey.
3. Once you have created a new survey you will have an editable survey you can customize.
Customize the survey fields:
1. Edit the title by clicking “Edit title”. Enter your new title and press OK. This title will help you differentiate it from the other surveys.
2. Make the survey usable, buy clicking Active
3. Click the radio buttons to make the survey Repeatable (so it can be used more than once for each visitor)
4. Click the radio button to track the survey and the results will be stored in the reports section.
5. If you wish to have the survey results sent to an email address as they are submitted click on the New Address button and enter the email address you wish to have the results sent to. The survey results will still also be stored in the reports section if marked as Tracked.
Adding questions:
At the bottom of the survey you will see the buttons: One question and Five Questions.
Choose to add questions one at a time or in increments of five.
You may choose to add columns or page breaks here as well.
Once you've chosen to add a question(s), you will be brought to a screen where you can add a question in a text box and can choose the format of the answer from the drop down menu.
1. Add your question in the text box.
2. Select the format for the answer.
The answers can be a single line of text, multiple lines of text, drop down menu, radio buttons, check boxes or grouped answers. Choose the format that best suits your need and input the associated fields accordingly.
3. When your questions have been input press submit.
Options:
You may also Edit the wording or make the field required here.
Auto Alert will alert you when a specific answer has been give to a question.
You may remove any fields you wish by deleting them.
You may also re-arrange the order the fields by using the arrows at left.
You may add any custom HTML to each question to format yourself if you prefer.
For the Pre-chat survey only:
Set as user name defines which field is used for the visitors name. If you do not set a field for the user name, the agent will see the word “guest” rather than their name during a chat, so you may wish to set this for the name field.
Set as email address will set that answer as the users email address and pass that information through to your agent.
Using your Survey:
1. Go back to Engage > Design
2. Click on the appropriate icon (Pre or Post chat or Not Here Form)
3. Select the appropriate department. or select General to use the survey for all departments
4. Select embed a custom survey from the radio buttons Once you do this a drop down menu will appear showing you your survey choices, including your new survey.
5. Select the survey you wish to use from the drop down menu. This will now be your active

survey.
If you have multiple departments, you may elect to create and use different surveys for each department.
You may also deploy surveys directly to your web site under Deploy->Surveys if you wish to embed them directly onto your web pages.

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