Marketing survey campaigns

Entersoft Business Suite® | Entersoft CRM®

User guide

Identification

Software version Marketing survey campaigns

Last updated on 01/09/2021

Copyright

Symbols

Symbol	Definition
	User
	Administrator/Consultant
	Attention!
	Suggestion
	Note
	Example
	Configuration
	Parameter
<ENTER>	Keyboard
Menu	Menu options, actions

Contents

Outline

A survey is a research method used for collecting data from a predefined group of individuals to gain information and insights into various topics of interest. Each survey has a specific purpose. For example, you may execute a customer satisfaction survey to understand your customer's satisfaction level with your organization's products, services, or experiences.

Entersoft marketing survey is an online cloud service which can be used to execute online surveys over the internet. Using the service you may upload a survey campaign for a specific target group. In this way, the responder completes a questionnaire through a web form provided by the Entersoft survey cloud service. The web form is rendered based on the selected survey questionnaire. The feedback can be anonymous or not.

Entersoft surveys support the following processes:

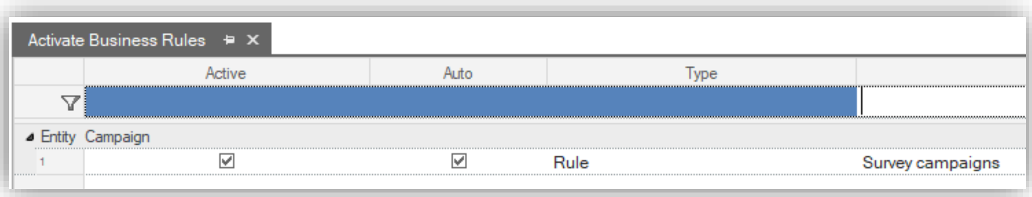
- Define questionnaire
- Define survey welcome and closing pages
- Define invitation email body html file
- Define target group
- Create survey campaign template
- Create survey campaign
- Upload campaign to cloud app service
- Test email invitation
- Test survey on internet browser
- Send an email invitation to the audience of the target group
- Collect feedback
- Examine non responders and send reminder invitation email
- Analyze survey feedback using advanced weighted scoring and sentiment analysis
- Analyze survey items performing analysis by question or cross question analysis
- Create new target groups based on weighted scoring level or for all responders for further post actions.

This document describes the above processes to help you to gain a deep understating of how to design, execute and analyze a marketing survey.

System preparation & configuration

Before proceeding with the Survey campaigns, the following procedures are required:

- Import data from ESCRMZero using the related emi
- Define the email sender, through the Menu: Configuration… > General > Company parameters > CRM Marketing > Newsletter sender email.
- Ensure that the Survey campaigns business rule is activated, through the Menu: Settings > Development & customization tools > Rule activation…



- Define in which language you wish the Survey campaign to be conducted, through the Menu: Configuration… > General > Company parameters > CRM Marketing > Campaign survey language. The default language is English.

- Set the Entersoft cloud store API keys in the ES Cloud Store - Endpoint Token ID for use of Entersoft Surveys (Questionnaires) & ES Cloud Store - Subscription GID parameters, through the Menu: Configuration… > General > Company parameters > Entersoft cloud.

- Set the URL the respondent should be redirected to after submitting the survey, through the Menu: Configuration… > General > Company parameters > CRM Marketing > The URL to which a survey participant will be redirected, after survey submission.

Working with questionnaires

To begin with, the most important part of a survey campaign is the questions that will be addressed to your audience. For this reason, before proceeding with the design of a questionnaire, you should have defined a clear, attainable goal for your survey. Once you have come up with your goal, you can use it as a reference to prioritize the top questions you want to ask.

Also, a good practice is to keep your early set of questions light and straightforward, and then slowly move towards more personal questions (often taking the form of demographic questions) and do not let your survey get too long.

Additionally, it is highly recommended to focus on using closed-ended questions and balanced answer choices.

Moreover, some questions might matter more than others, as well as their answers. In this case, you should define the weight of the questions and the score of the answer choices.

Finally, you need to define the display method of a question and the possible answers.

Example of unbalanced and balanced answer choices

Question: "How helpful or unhelpful were our customer service representatives?"

Here is how a set of unbalanced answer choices (that lean towards being too positive) can look for that question:

a. Very helpful

b. Helpful

c. Neither helpful nor unhelpful

And here is how they would look once balanced:

a. Very helpful

b. Helpful

c. Neither helpful nor unhelpful

d. Unhelpful

e. Very unhelpful

1. Design a questionnaire

To design a questionnaire, you need to go through the Menu: Configuration and tools > Configuration… > Field customization > Additional properties > Property set. On the toolbar placed on the right side of the property set list, click on the 'Insert new line' button. On the property set form, the following should be filled out:

Field name	***Description***
	Basic Data
Code	**Mandatory** - The code of the property set / questionnaire
Type	**Mandatory** - The type of property set / questionnaire. The **Campaign survey value must be set**.
Description	Optional - The description of the property set / questionnaire
Alternative description	Optional - The alternative description of the property set / questionnaire
	Properties grid
Seq. No.	**Mandatory** – It is automatically assigned to the question when you click in the Description field.
Code	**Mandatory –** It is automatically assigned to the question when you click in the Description field. It is the concatenation of the property set / questionnaire code (prefix) and auto- incremental number (suffix). Also, you can choose a question which has already been created, see section Set existing question
Description	**Mandatory –** It is the text that will be displayed to the responder as question.
Type	**Mandatory –** The type of the answer.

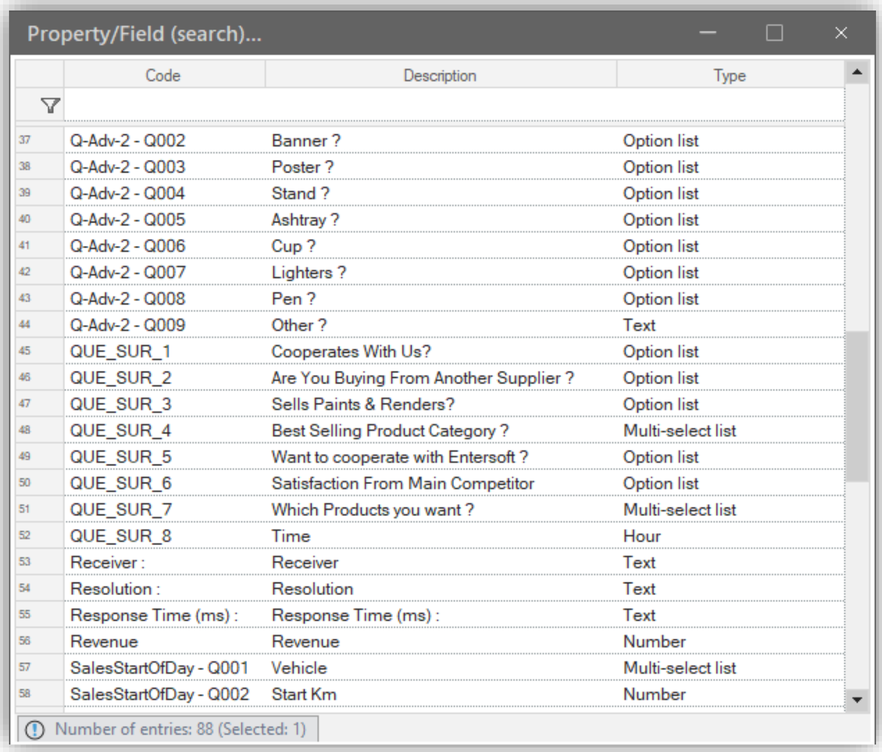
Available type options	
Text	A field where the respondent can write free text
Decimal	A field where the respondent can set a decimal number
Number	A field where the respondent can set a number
Date	A field where the respondent can set a date
Option list	A field where the respondent can choose one value between several options. These options are defined by the questionnaire designer and it is thoroughly described in the section *Set existing question*
Value in base currency	A field where the respondent can enter a decimal number
Date & time	A field where the respondent can set a date & time
Hour	A field where the respondent can set hour

	Multi-select list	A field where the respondent can choose multiple values between several options. These options are defined by the questionnaire designer and it is thoroughly described in the section *Option & multi-select list question type*
	Percentage	A field where the respondent can set a percentage
Additional elements	It is mandatory when the type of the property/question is option list or multi-select list. The configuration of this field is thoroughly described in the section *Set additional element values/answer choices*	
Category	**Mandatory** – The category of the question. When you click in the cell the ... button is shown. By clicking on this button, the available categories are listed. The category management is thoroughly described in the section *Property/Question category management*	
Description	The property/question category description. It is automatically filled out when the category field is filled out.	
Default value	Optional - The default value of the property/question.	
Mandatory	It defines if this property/question is mandatory or not.	
Alternative description	Optional - The alternative description of the property/question	
Visualization	**Mandatory** – This field defines the method of depiction of the answer choices of the question in dashboards.	
	Available representation options	
	No	The answer choices of the property/question will not be depicted
	Pie	The answer choices of the property/question will be depicted in a pie chart
	Ring	The answer choices of the property/question will be depicted on a ring/donut chart
	Horizontal bar	The answer choices of the property/question will be depicted in a horizontal bar chart
	Vertical bar	The answer choices of the property/question will be depicted in a vertical bar chart
	Multi-color horizontal bar	The answer choices of the property/question will be depicted in a multi-color horizontal bar chart
	Multi-color vertical bar	The answer choices of the property/question will be depicted in a multi-color vertical bar chart
Categories		

<table>
<tr><td>Photo</td><td>It defines if this property/question is a photo or not.</td></tr>
<tr><td>Weight</td><td>The weight that this question gets among the others. The use of the property/question weight is thoroughly described in the section <u>Weighted scoring</u></td></tr>
<tr><td>Style</td><td>Mandatory – This option refers to the web component that will be used for depicting the answer choices of the property/question on the web questionnaire form.
<table>
<tr><th colspan="2">Available styles</th></tr>
<tr><td>addlist</td><td>The answer choices of the question are displayed using the addlist web component.</td></tr>
<tr><td>checkbox</td><td>The answer choices of the question are displayed using the checkbox web component.</td></tr>
<tr><td>dropdown</td><td>The answer choices of the question are displayed using the drop down web component.</td></tr>
<tr><td>radiobutton</td><td>The answer choices of the question are displayed using the radio button web component.</td></tr>
<tr><td>stars</td><td>The answer choices of the question are displayed using the stars web component.</td></tr>
<tr><td>switch</td><td>The answer choices of the question are displayed using the switch web component.</td></tr>
</table></td></tr>
<tr><td>Maximum number of values</td><td>Optional - It could be used when the type of the property/question is multi-select list to define the maximum number of answers.</td></tr>
<tr><td>Relevant line SEQ. NO</td><td>Optional – It refers to the seq. no of another question that this question is related to. The use of this field is thoroughly described in the section <u>Advanced features</u></td></tr>
<tr><td>List value - relevant line</td><td>Optional – It refers to the value of the list of the related question. The use of this field is thoroughly described in the section <u>Advanced features</u></td></tr>
<tr><td>Inactive</td><td>It defines if the property/question is active or not.</td></tr>
</table>

1.1 Set existing question

In some cases, a question might be used several times in different questionnaires. If the question has already been created, then click in the Code cell of Properties grid the ... button. The list with the available properties/questions is shown and you can select among them.



Property/Field (search)...

	Code	Description	Type
37	Q-Adv-2 - Q002	Banner ?	Option list
38	Q-Adv-2 - Q003	Poster ?	Option list
39	Q-Adv-2 - Q004	Stand ?	Option list
40	Q-Adv-2 - Q005	Ashtray ?	Option list
41	Q-Adv-2 - Q006	Cup ?	Option list
42	Q-Adv-2 - Q007	Lighters ?	Option list
43	Q-Adv-2 - Q008	Pen ?	Option list
44	Q-Adv-2 - Q009	Other ?	Text
45	QUE_SUR_1	Cooperates With Us?	Option list
46	QUE_SUR_2	Are You Buying From Another Supplier ?	Option list
47	QUE_SUR_3	Sells Paints & Renders?	Option list
48	QUE_SUR_4	Best Selling Product Category ?	Multi-select list
49	QUE_SUR_5	Want to cooperate with Entersoft ?	Option list
50	QUE_SUR_6	Satisfaction From Main Competitor	Option list
51	QUE_SUR_7	Which Products you want ?	Multi-select list
52	QUE_SUR_8	Time	Hour
53	Receiver :	Receiver	Text
54	Resolution :	Resolution	Text
55	Response Time (ms) :	Response Time (ms) :	Text
56	Revenue	Revenue	Number
57	SalesStartOfDay - Q001	Vehicle	Multi-select list
58	SalesStartOfDay - Q002	Start Km	Number

Number of entries: 88 (Selected: 1)

1.2 Option & multi-select list question type

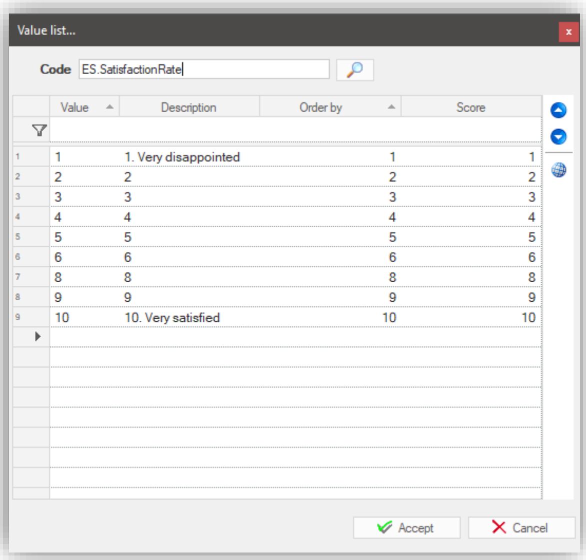
These two types of questions allow the respondent to choose a single answer when the type is option list and multiple answers when the type is multi-select list from a predefined option list. The list of values/answers could be used more than once in different questions, different questionnaires and they are inserted through the field Additional elements.

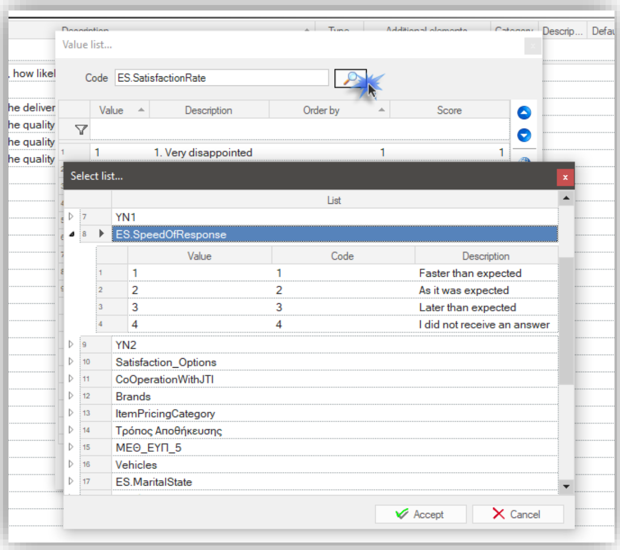
1.2.1 Set additional element values/answer choices

To insert additional element values, click on the Additional element cell the ... button. In the pop-up additional element form, you need to fill out the following:

Field name	***Description***	
Code	**Mandatory** - The value list code.	
	Grid	
	Value	The value of the element value/answer
	Description	The description of the element value/answer
	Order by	The order listed in the list.
	Score	The score of the element value/answer. For further information about scoring, see section *Weighted scoring*

If you wish to use a value list/answer choices which has already been created then you can click the button to view and select one of the available value list/answer choices.





1.3 Property/Question category management

To manage the available property/question categories go to Menu: Configuration and tools > Configuration… > Field customization > Additional properties > Property categories and you can insert a new category or change/delete an existing.

<table>
<tr><th>Field name</th><th colspan="3">Description</th></tr>
<tr><td>Code</td><td colspan="3">Mandatory - The category code.</td></tr>
<tr><td>Description</td><td colspan="3">Mandatory - The category description.</td></tr>
<tr><td>Alt. description</td><td colspan="3">Optional - The category alternative description.</td></tr>
<tr><td>Order by</td><td colspan="3">The order of the category.</td></tr>
<tr><td>Style</td><td colspan="3">Mandatory - The display method of the questions that belong to this category</td></tr>
<tr><td></td><td colspan="3">Available options</td></tr>
<tr><td></td><td rowspan="5">cross</td><td colspan="2">The questions that belong to the category with this style, will be grouped the category and by the additional elements/answer choices assigned to each one of the questions, when the type of the question is ‘option list’ or ‘multi-select list’.

The questions will be displayed grouped by the category, question type or/and additional elements/answer.</td></tr>
<tr><td></td><td colspan="2">Combinations</td></tr>
<tr><td></td><td>Question type →Option list

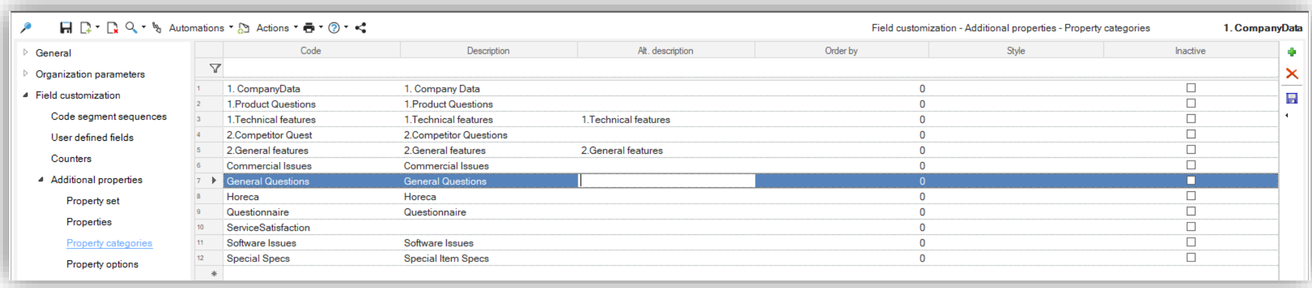
With the same answer choices</td><td>The questions will be displayed on the top of a table horizontally (header), while the option list values will be displayed vertically in the first table column. The style of the value of the option list will be displayed as radio buttons.</td></tr>
<tr><td></td><td>Question type →Multi-select

With the same answer choices</td><td>The questions will be displayed on the top of a table horizontally (header), while the option list values will be displayed vertically in the first table column. The style of the value of the option list will be displayed as check boxes.</td></tr>
<tr><td></td><td>Question type →Multi-select & Option list

With the same answer choices</td><td>The questions will be displayed on the top of a table horizontally (header), while the option list values will be displayed vertically in the first table column. The</td></tr>
</table>

		style of the value of the option list will be displayed as check boxes. For the multi-select questions, the respondent will be allowed to select as many choices as defined, while for the option list questions the respondent will be allowed to choose only one value.
cross_reversed	The questions that belong to the category with this style, will be grouped the category and by the additional elements/answer choices assigned to each one of the questions, when the type of the question is 'option list' or 'multi-select list'. The questions will be displayed grouped by the category, question type or/and additional elements/answer.	
	Combinations	
	Question type ➔Option list With the same answer choices	The option list values will be displayed on the top of a table horizontally (header), while the questions will be displayed vertically in the first table column. The style of the value of the option list will be displayed as radio buttons.
	Question type ➔Multi-select With the same answer choices	The option list values will be displayed on the top of a table horizontally (header), while the questions will be displayed vertically in the first table column. The style of the value of the option list will be displayed as check boxes.
	Question type ➔Multi-select & Option list With the same answer choices	The option list values will be displayed on the top of a table horizontally (header), while the questions will be displayed vertically in the first table column. The style of the value of the option list will be displayed as check boxes. For the multi-select questions, the respondent will be allowed to select as many choices as defined, while for the option list questions

	the respondent will be allowed to choose only one value.
doublecolumn	The questions and their additional elements/answer choices will be displayed in two columns.
singlecolumn	The questions and their additional elements/answer choices will be displayed in one column.



1.4 Weighted scoring

Weighted scoring is a standard method to calculate the level of satisfaction of your survey responses. It is calculated based on the responses received by your audience. In this context, you can get a quick insight on how positive or negative is a participant's opinion. Also, it is calculated only for questions of the following types:

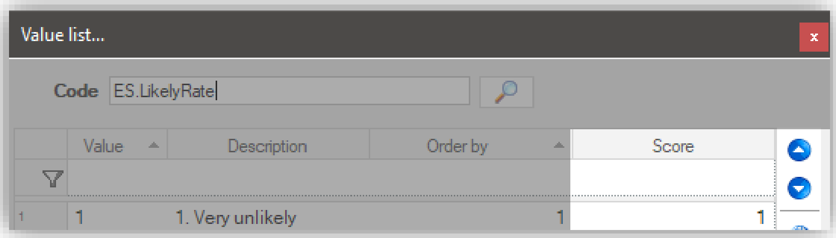
- Option list
- Multi-select option list
- Percentage

The calculation formula is as follows:

Q1_Answer_Score * Weight(Q1) + Q2_Answer_Score * Weight(Q2) +... + Qn_Answer_Score * Weight(Qn)

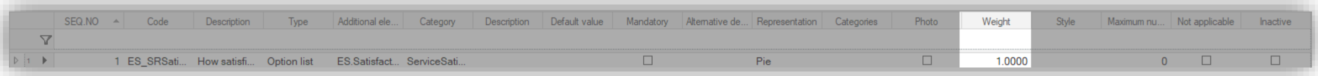
Where

Q_Answer_Score is the score defined in the additional element values/answer choices grid in the Score field



&

Weight(Q) is the weight defined in the properties/questions grid in the column Weight.

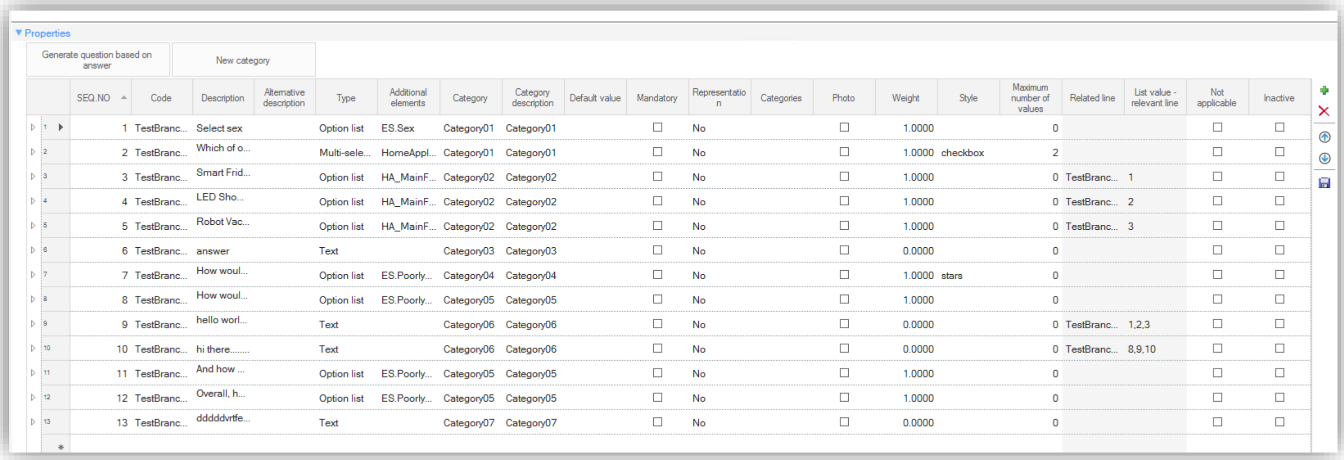


1.5 Advanced features

1.5.1 Related property/question based on given answer

In some cases, the answer to a question may raise another question. For this reason, the feature of relating one question to another based on the answer given is supported. To relate a question to another, you need to select the question you wish from the drop down list in the Related line field. By selecting one question from the list, the Related line field is filled in with the code of the selected question. Also, you need to fill in the List value - relevant line field with the value of list of the related question that the respondent need to select, so the related question to be shown. To do so, you need to click in the List value - relevant line field and press 

. The list with the values of the selected question is shown. You can selected as many values as you wish.



SEQ.NO	Code	Description	Alternative description	Type	Additional elements	Category	Category description	Default value	Mandatory	Representation	Categories	Photo	Weight	Style	Maximum number of values	Related line	List value - relevant line	Not applicable	Inactive
1	TestBranc...	Select sex		Option list	ES.Sex	Category01	Category01		☐	No		☐	1.0000		0			☐	☐
2	TestBranc...	Which of o...		Multi-sele...	HomeAppl...	Category01	Category01		☐	No		☐	1.0000	checkbox	2			☐	☐
3	TestBranc...	Smart Frid...		Option list	HA_MainF...	Category02	Category02		☐	No		☐	1.0000		0	TestBranc...	1	☐	☐
4	TestBranc...	LED Sho...		Option list	HA_MainF...	Category02	Category02		☐	No		☐	1.0000		0	TestBranc...	2	☐	☐
5	TestBranc...	Robot Vac...		Option list	HA_MainF...	Category02	Category02		☐	No		☐	1.0000		0	TestBranc...	3	☐	☐
6	TestBranc...	answer		Text		Category03	Category03		☐	No		☐	0.0000		0			☐	☐
7	TestBranc...	How woul...		Option list	ES.Poorly...	Category04	Category04		☐	No		☐	1.0000	stars	0			☐	☐
8	TestBranc...	How woul...		Option list	ES.Poorly...	Category05	Category05		☐	No		☐	1.0000		0			☐	☐
9	TestBranc...	hello worl...		Text		Category06	Category06		☐	No		☐	0.0000		0	TestBranc...	1,2,3	☐	☐
10	TestBranc...	hi there.......		Text		Category06	Category06		☐	No		☐	0.0000		0	TestBranc...	8,9,10	☐	☐
11	TestBranc...	And how ...		Option list	ES.Poorly...	Category05	Category05		☐	No		☐	1.0000		0			☐	☐
12	TestBranc...	Overall, h...		Option list	ES.Poorly...	Category05	Category05		☐	No		☐	1.0000		0			☐	☐
13	TestBranc...	dddddvrtfe...		Text		Category07	Category07		☐	No		☐	0.0000		0			☐	☐

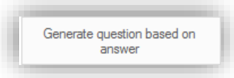
Example

In the picture above the property/question with the code Q3 is related to the property/question with code Q2 and the property/question with code Q3 will be shown ONLY when the respondent selects the value 1 in the property/question with code Q2.

Respectively, the property/question with the code Q9 is related to the property/question with code Q8 and the property/question with code Q9 will be shown ONLY when the respondent selects the value 1 or 2 or 3 in the property/question with code Q8.

1.5.2 Repeater

Occasionally, you want to get in-depth information about the values of a question when one of them is selected. In this case, you need to create the related question. For this reason, the Generate question based on answer action is supported. This feature is supported only for option & multi-select list types of questions. Firstly, you need to select the question that contains the answers/options based on which the related values will be created. Then, by clicking on the



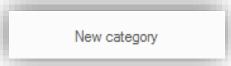
button, a dialog box is shown in which you need to fill in the following:

Field name	***Description***	
Type	**Mandatory** - The type of the questions that will be created. The default value is text.	
	Values	
	Text	A field where the respondent can write free text
	Option list	A field where the respondent can choose one value between several options. These options are defined by the questionnaire designer and it is thoroughly described in the section *Set existing question*
	Value in base currency	A field where the respondent can enter a decimal number
	Multi-select list	A field where the respondent can choose multiple values between several options. These options are defined by the questionnaire designer and it is thoroughly described in the section *Option & multi-select list question type*
	Percentage	A field where the respondent can set a percentage
Additional elements	Optional – This field need to be filled in when the selected type is Option list or Multi-select list.	
Category	**Mandatory** - The category of the question.	

Afterwards, you need to click the

button and then, a number of questions/properties of the selected type and category are inserted. This number is equal to the number of answers/options of the source question/property and the description of each generated question/property is the description of each answer/option of the source question/property.

1.5.1 Create new category

To create a new category, you need to click the 

button and fill in the following fields in the dialog box shown:

Field name	***Description***
Code	**Mandatory** - The category code.
Description	**Mandatory** - The category description.
Style	**Mandatory** - The display method of the questions that belong to this category. The default value is 'Cross'. For further information about category styles, see section *Property/Question category management*
Order by	The order of the category.

Then, by clicking the 

button of the dialog box, the new category is inserted.

Working with HTML files

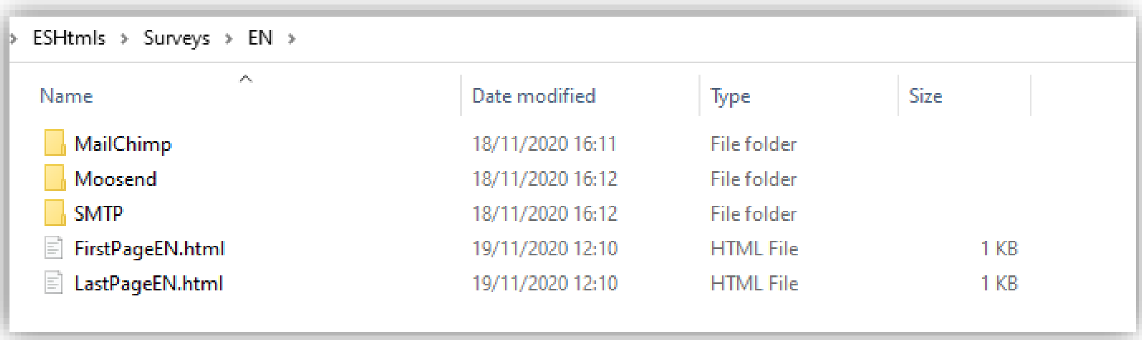
A survey campaign consists of three (3) HTML files and one (1) image URL; the survey campaign welcome page, closing page, invitation email and the logo of your company. But only the invitation email HTML file is **mandatory,** because it is used for asking your audience to take the survey via email. Though, it would be appropriate to use a welcome and a closing page to show that your company cares about its customers, therefore, want to make them feel welcome and comfortable to proceed with filling out your questionnaire, and so keeps its standards high.

To help you for the aforementioned reasons, Entersoft S.A. offers you an end-to-end solution that covers two case scenarios; the customer service satisfaction and the customer shopping experience. This solution consists of a set of HTML files that can be found in the application folder trough the path: ESHtmls\Surveys. The set of HTML files is categorized into subfolders having as reference the system available languages and methods of sending the invitation emails.

The available methods of sending an invitation email are:

- Through email provider
    - Moosend
    - MailChimp
- Through SMTP

Both methods are thoroughly described in the *Send survey invitation emails* section.



Additionally, each invitation email contains information about the survey campaign, so the survey campaign mechanism is responsible for replacing specific tags in each HTML file.

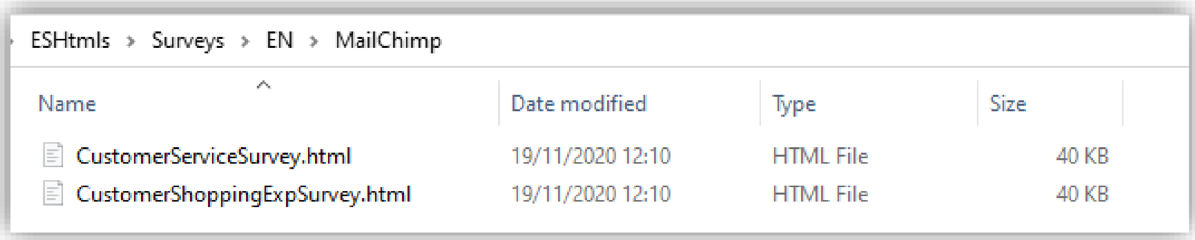
Finally, if you wish, you can create your own HTML files by embedding the proper tags and store them in a directory that the EBS application will have access to.

2. Default HTML files

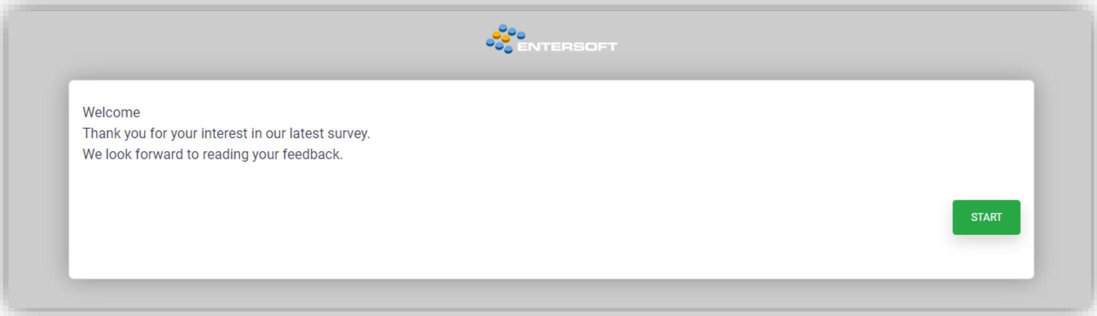
As previously mentioned, Entersoft S.A. offers an end-to-end solution covering the customer service satisfaction and customer shopping experience scenarios.

All the available HTML files can be found in the application folder trough the path: ESHtmls\Surveys. The set of HTML files is categorized into subfolders having as reference the system available languages and methods of sending the invitation emails. Therefore, the folder named EN contains the HTML files using the English language. Respectively, the folder maned MailChimp contains the HTML files for the customer service satisfaction and customer shopping experience scenarios that will be used for sending the invitation emails through MailChimp and so on and so forth.

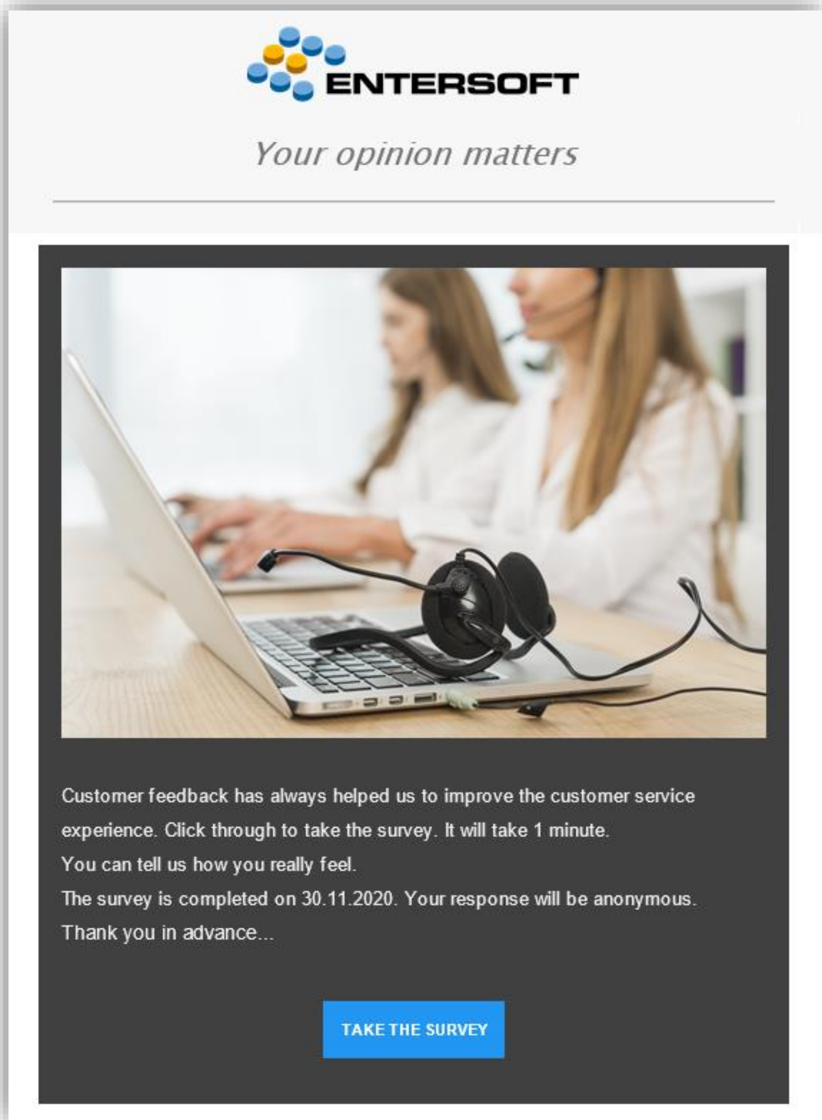
The HTML files corresponding to the customer service satisfaction are the files named as CustomerServiceSurvey and the HTML files corresponding to the customer shopping experience scenario are the files named CustomerShoppingExpSurvey.



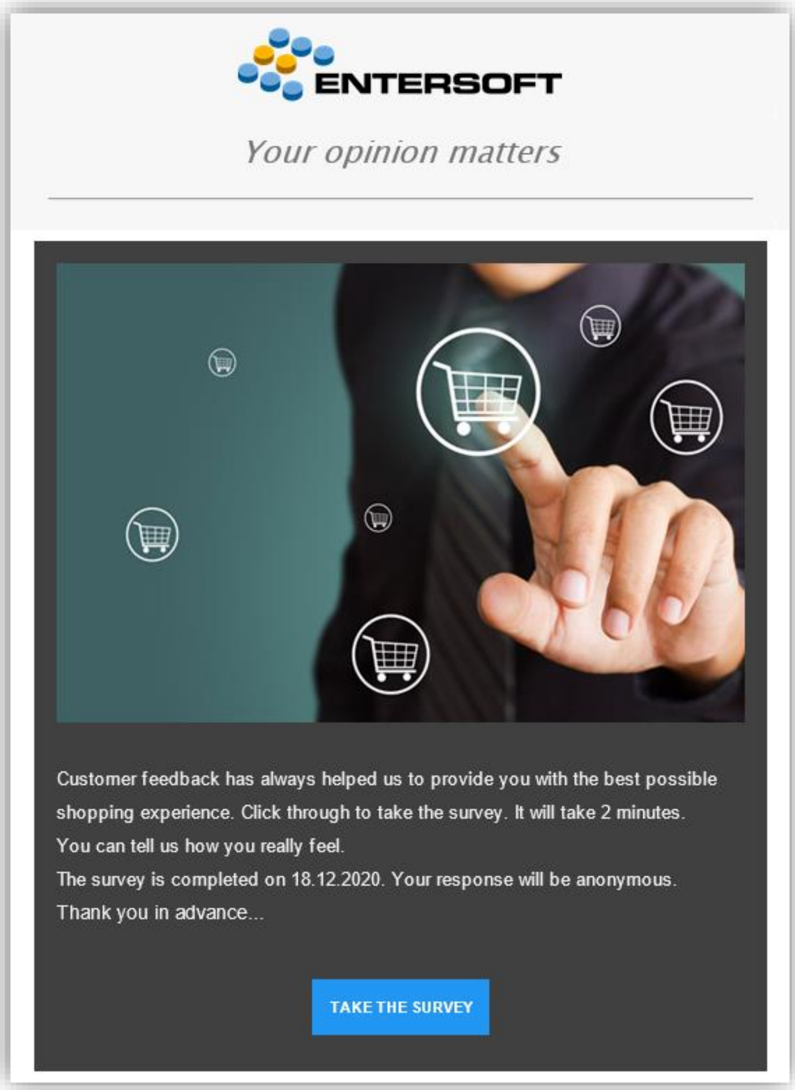
Preview of welcome page



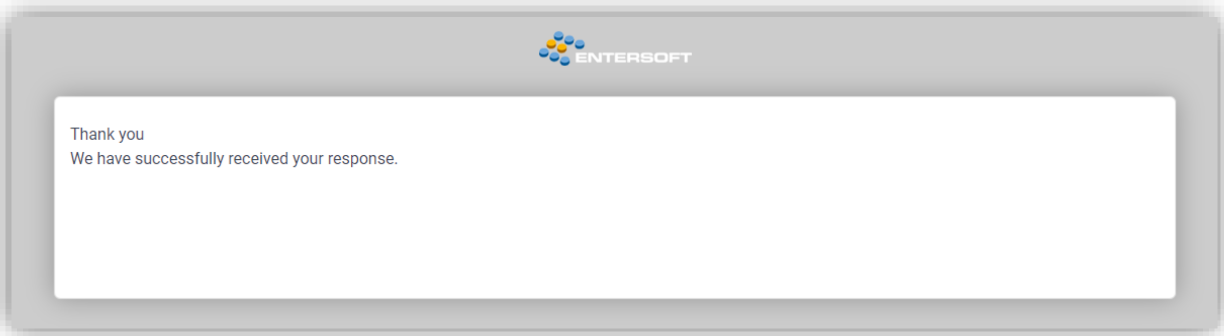
Preview of Customer Service Satisfaction invitation email



Preview of Customer Shopping Experience invitation email



Preview of closing page



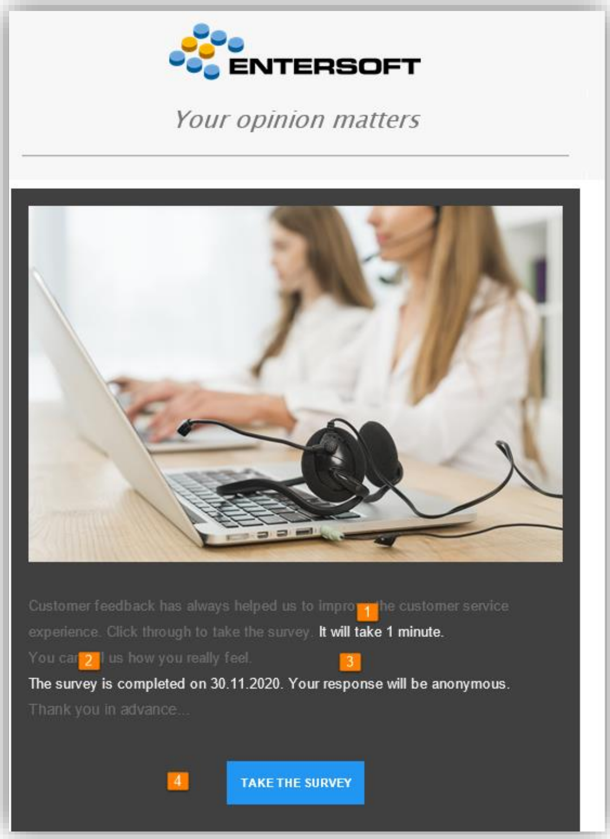
2.1 Welcome & closing HTML files

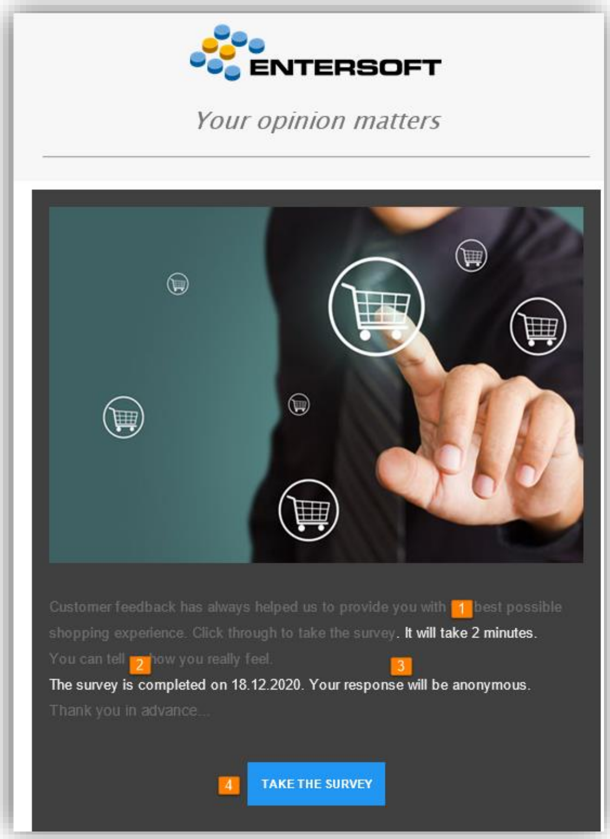
These files can be found in the application folder trough the path: ESHtmls\Surveys. These HTML files are categorized into subfolders having as reference the system available languages, therefore the folder named EN contains the HTML files using the English language and so one and so forth. They are used independently of the methods of sending the invitation emails. The content of these HTML files can be edited.

2.2 Invitation email HTML file tags

Each HTML file uses a number of tags used for embedding information about a survey campaign in this file, e.g. the duration of the survey. Because of the different methods of sending an invitation email, these tags differ too. The available tags are the following:

~ Each numbered phrase in the previews below are mapped to the corresponding tag in the table below ~





Survey field (in form)	***HTML Tag by provider***		
	MailChimp	**Moosend**	**SMTP**
1 *Survey duration*	*|DURATION|*	#recipient:Duration| fallback#	#DURATION#
2 *Completed on*	*|SCLOSURE|*	#recipient:SClosure| fallback#	#SCLOSURE#
3 *Anonymous*	*|UNNAMED|*	#recipient:Unnamed| fallback#	#UNNAMED#
4 *URL**	*|URL|*	#recipient:URL| fallback#	#URL#

NOTE about URL*

The URL tag is not shown in the survey campaign form as a field. Though, it is created and handled by the marketing survey campaign mechanism. It is **mandatory** in the HTML files and refers to the URL of the button.

2.2.1 Set company logo

To define your company's logo, you need to create an image URL of your logo and afterwards open the HTML files and replace the default image URL. To easily find the default image URL which should be replaced open the file and search for

https://essurvey.blob.core.windows.net/images/ESLogo.png

Otherwise, you can search for the mcnImageContent class and replace the value/url in the **src** property.

```html
<td valign="top" style="padding:9px" class="mcnImageBlockInner">
    <table align="left" width="100%" border="0" cellpadding="0"
        cellspacing="0" class="mcnImageContentContainer"
        style="min-width:100%;">
        <tbody>
            <tr>
                <td class="mcnImageContent" valign="top"
                    style="padding-right: 9px; padding-left: 9px; padding-top: 0; padding-bottom: 0; text-align:center;">


                    <img align="center" alt=""
                        src="https://essurvey.blob.core.windows.net/images/ESLogo.png"
                        width="259.44"
                        style="max-width:1600px; padding-bottom: 0; display: inline !important; vertical-align: bottom;"
                        class="mcnImage">


                </td>
            </tr>
        </tbody>
    </table>
```

Attention

After editing any of the HTML files you need to save them in **CSHtmls**.

Working with survey campaign templates

The purpose of the survey campaign template is to help you create easily survey campaigns which might be conducted more than once. For instance, a survey with the same questionnaire, duration, subject, etc. should be conducted every six (6) months. Since the pattern of the survey campaign is the same or it slightly differs, you can create a survey campaign template and apply it to these campaigns.

3. Create survey campaign template

To create a new survey campaign template go through the Menu: Marketing > Surveys > Survey templates to the view survey template list and click the ➕ 'Insert new line' button on the toolbar placed on the right side.

Starting with the configuration of a survey campaign template, its master data should be defined. To do declare them, fill out the following fields:

Field name	***Description***
Name	**Mandatory** -- The name of the survey campaign template.
Questionnaire	**Mandatory** - The questionnaire that will be sent to your audience.
Survey duration	**Mandatory** - The duration of the survey campaign.
QTemplate	**Mandatory** – The display method of the questions. *Available options* *Vertical*: All questions will be displayed continuously one after the other on a single page. *Tabbed*: The questions will be shown in tabs. Each tab corresponds to the number of categories assigned to the questions of the questionnaire. All tabs will be visible at once to the respondent. *GroupPerPage*: The questions will be shown in groups per page. Each group corresponds to the number of categories assigned to the questions of the questionnaire. Firstly, the page corresponding to the category assigned to the 1st question or set of questions will be visible. The 2nd page will be displayed after the respondent click the next page button and only if all the mandatory questions are answered. And so on and so forth. At any time the respondent can click the previous page button to see the questions of the previous page.
Representative	Optional - Representative of the survey campaign.
Email subject	**Mandatory** – The email subject of the invitation email that will be sent to your audience. It is automatically filled out with a default value.
Sender email	**Mandatory –** It is automatically filled out with the value of the 'Newsletter sender email' company parameter

3.1 Assign HTML files

In the 'Attachments' section, the survey campaign welcome page, closing page, invitation email HTML files and the logo of your company should be defined. The survey campaign welcome page, closing page, invitation email HTML files are **mandatory** in order to proceed with the conduction of a survey campaign. Though, the logo of your company is not mandatory. On the other hand, if you wish to avoid assigning a logo as many times as the number of the templates created, you can save the logo of your company in the **CSWebAssets** folder of the application folder with the name **Survey_Logo**. The following file types are supported:

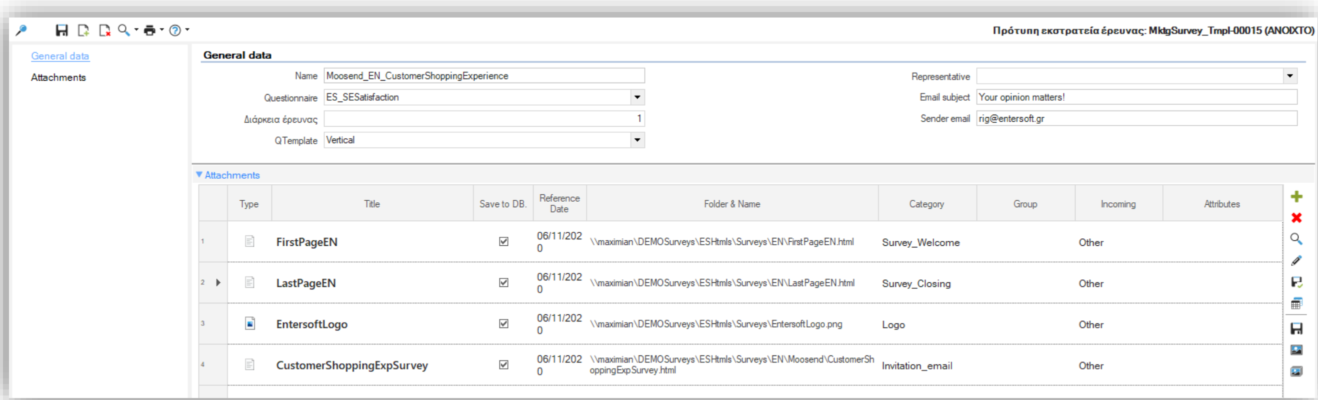
- ".png",
- ".jpg",
- ".jpeg",
- ".bmp"

Although, if you wish to use another logo of the one saved to the CSWebAssets folder (e.g. with different colors, etc.) you can assign it to the related files section of the campaign template. The logo recommended dimensions are 80px height and 250px width.

The application has several HTML templates that could be used. These HTML files are thoroughly described in the section *Default HTML files*.

To define the four (4) aforementioned files, you should click on a row and go inside the cell of the 'Folder & Name' column and click the ... to open the navigation pane and select the file you wish to use. Then, to define the type of the file, go to the category field and select the desired category. The valid category values are the following:

- **Survey_Welcome** – Defined that the selected file corresponds to the survey campaign welcome page
- **Survey_Closing** – Defined that the selected file corresponds to the survey campaign closing page
- **Invitation_email** – Defined that the selected file corresponds to the survey campaign invitation email
- **Logo** – Defined that the selected file corresponds to your company logo



Working with survey campaigns

4. Create survey campaign

To create a new survey campaign go through the menu: Marketing > Surveys > Surveys to the view survey list and click the ‘Insert new line’ button on the toolbar placed on the right side.

Starting with the configuration of a survey campaign, its master data should be defined. To do declare them, fill out the following fields:

Field name	***Description***	
General Data		
Code	**Mandatory** -- The code of the survey campaign. It is automatically filled out.	
Name	**Mandatory** -- The name of the survey campaign template.	
List	Optional - The target group of the survey campaign.	
External campaign code	Optional - The code of the external campaign code. It is automatically filled out by the ‘Export data’ process when an external mail provider is used for conducting the campaign.	
Representative	Optional - The representative of the survey campaign.	
Status	**Mandatory** – It is automatically filled out by the system. It changes according to the performed processes.	
State (Cloud)	**Mandatory** – It is automatically filled out by the system. It changes according to the performed processes.	
Information		
Send email		
Email subject	**Mandatory** – The email subject of the invitation email that will be sent to your audience. It is automatically filled out with a default value.	
Sender email	**Mandatory –** It is automatically filled out with the value of the ‘Newsletter sender email’ company parameter.	
Survey		
Questionnaire	**Mandatory** - The questionnaire that will be sent to your audience. You can create or edit a questionnaire by clicking on the button.	
QTemplate	**Mandatory** – The display method of the questions.	
	Available options	
	Vertical	All questions will be displayed continuously one after the other on a single page.

	Tabbed	The questions will be shown in tabs. Each tab corresponds to the number of categories assigned to the questions of the questionnaire. All tabs will be visible at once to the respondent.
	GroupPerPage	The questions will be shown in groups per page. Each group corresponds to the number of categories assigned to the questions of the questionnaire. Firstly, the page corresponding to the category assigned to the 1st question or set of questions will be visible. The 2nd page will be displayed after the respondent click the next page button and only if all the mandatory questions are answered. And so on and so forth. At any time the respondent can click the previous page button to see the questions of the previous page.
Anonymous	Optional – When the flag is true, then the responses of your audience will be anonymous.	
Survey duration	**Mandatory** - The duration of the survey campaign.	
Start date	**Mandatory** - The start date of the survey campaign.	
Completed on	The end date of the survey campaign is mandatory when a target group is selected.	
Landing URL	Optional – The URL of the web page you wish the respondent to be redirected to.	

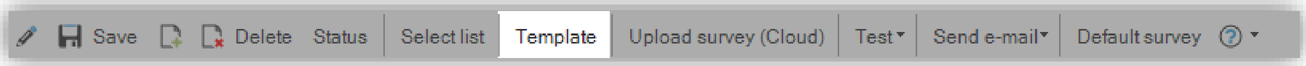
4.1 Apply survey campaign template

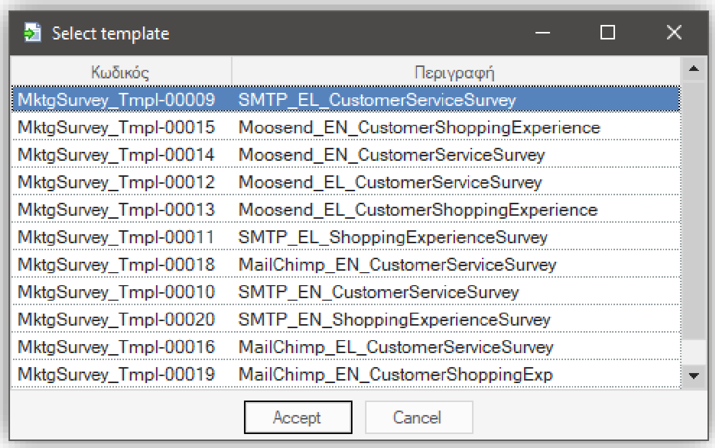
All the aforementioned fields, could be manually filled out, however, it is suggested to apply a survey campaign template.

To apply a survey campaign template, select Template on the survey campaign toolbar. By clicking on the Template option on the toolbar a pop-up window is shown with the available survey campaign templates listed. Select the template you wish to be applied to the survey campaign and the system will fill out, with the values previously assigned to the survey campaign template, the following fields:

- Name
- Email subject
- Sender email
- Questionnaire
- QTemplate

Additionally, the attachments that were assigned to the selected survey campaign templates will also be assigned to the attachments of the survey campaign.

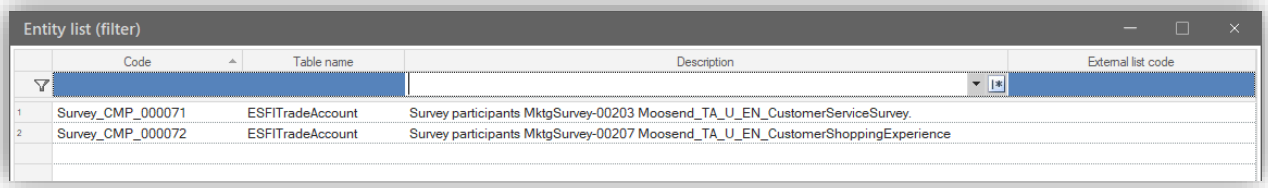




4.2 Address to a target group

4.2.1 Select list

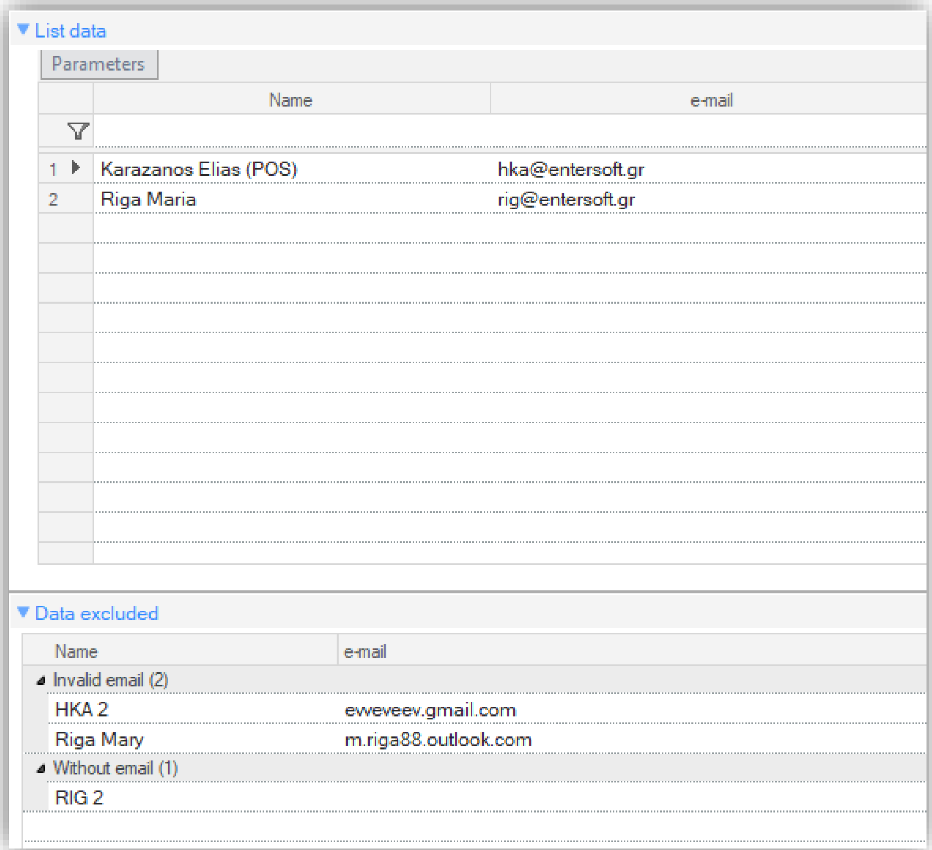
In case you wish a survey campaign to be addressed to a specific audience, you can assign the audience list you wish to the survey by selecting the Select list option on the survey campaign toolbar. A pop-up window is shown with the available audience lists listed. By selecting an audience list, the system fills out the 'List' field of the survey campaign form.



4.2.2 Preview list data

After selecting the audience you wish the survey to be addressed to, you can preview the list data through the List data section of the survey campaign form, in which the names and the email addresses of the audience are listed.

Additionally, there is the Data excluded section, in which the names and the email addresses of the members excluded along with the exemption reason are listed.



4.3 Assign HTML files

In this section, the survey campaign welcome page, closing page, invitation email HTML files and the logo of your company should be defined. The survey campaign welcome page, closing page, invitation email HTML files are **mandatory** in order to proceed with the conduction of a survey campaign. Though, the logo of your company is not mandatory. On the other hand, if you wish to avoid assigning a logo as many times as the number of the survey campaigns created, you can save the logo of your company in the **CSWebAssets** folder of the application folder with the name **Survey_Logo**. The following file types are supported:

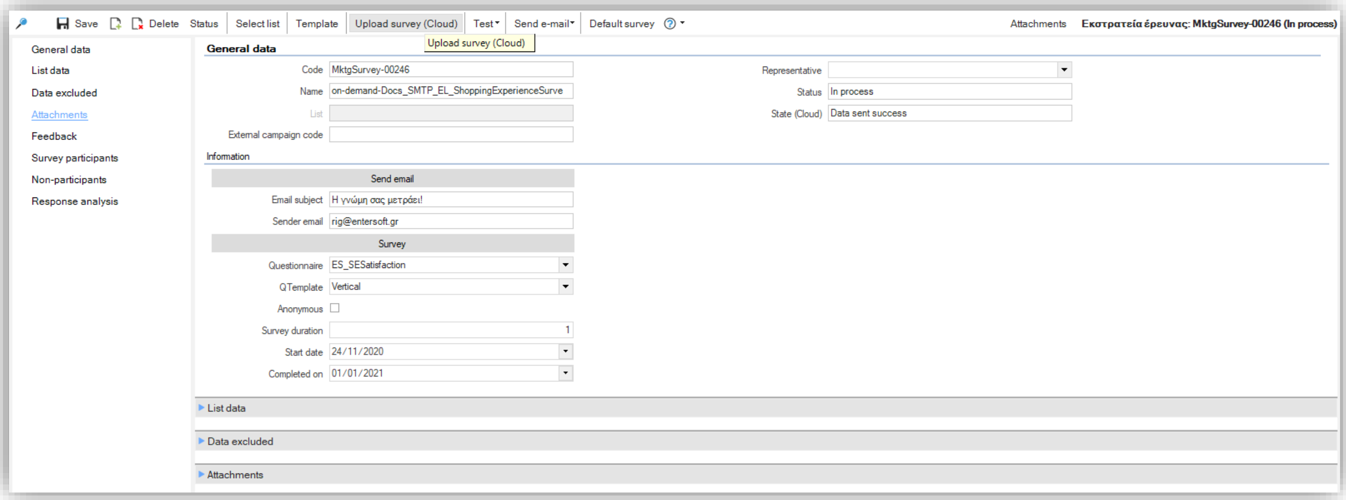
- ".png",
- ".jpg",
- ".jpeg",
- ".bmp"

Although, if you wish to use another logo of the one saved to the CSWebAssets folder (e.g. with different colors, etc.) you can assign it to the related files section of the survey campaign. The logo recommended dimensions are 80px height and 250px width.

The application has several HTML templates that could be used. These HTML files are thoroughly described in the section *Default HTML files.*

To define the four (4) aforementioned files, you should click on a row and go inside the cell of the 'Folder & Name' column and click the ... to open the navigation pane and select the file you wish to use. Then, to define the type of the file, go to the category field and select the desired category. The valid category values are the following:

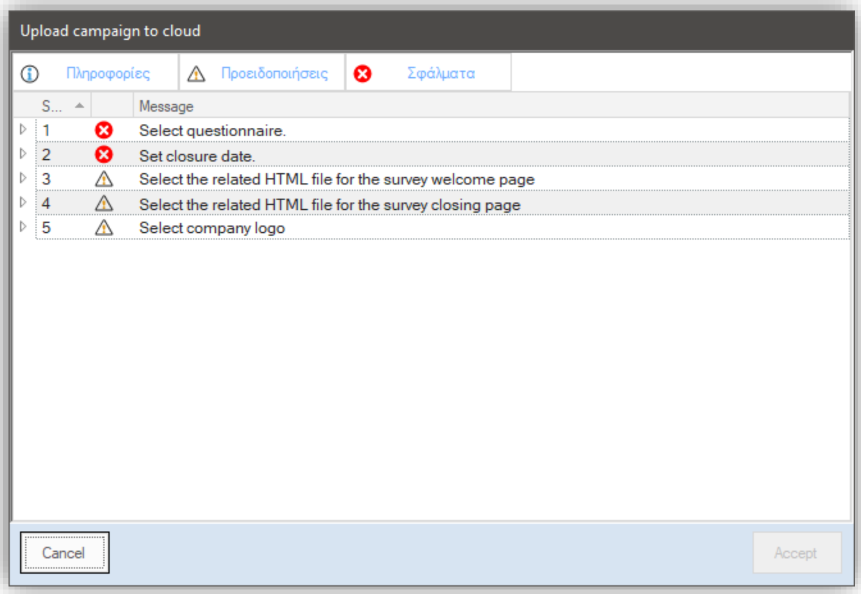
- **Survey_Welcome** – Defined that the selected file corresponds to the survey campaign welcome page
- **Survey_Closing** – Defined that the selected file corresponds to the survey campaign closing page
- **Invitation_email** – Defined that the selected file corresponds to the survey campaign invitation email
- **Logo** – Defined that the selected file corresponds to your company logo



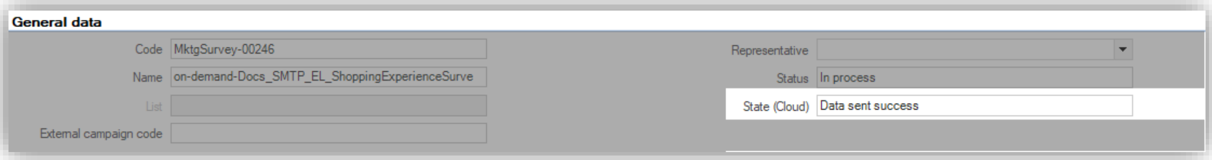
5. Upload survey to Cloud

After creating a survey, you need to upload it to the cloud. To do so, select the Upload survey (Cloud) option on the survey campaign toolbar.

If the survey is addressed to a target group, then the end of the survey must be defined. Otherwise, through several controls, a reminder is shown in case you have not assigned the HTML files or your company's logo to the Attachments, see section *Assign HTML files*



After uploading the survey to cloud, the related State (Cloud) field in the form of survey is updated.

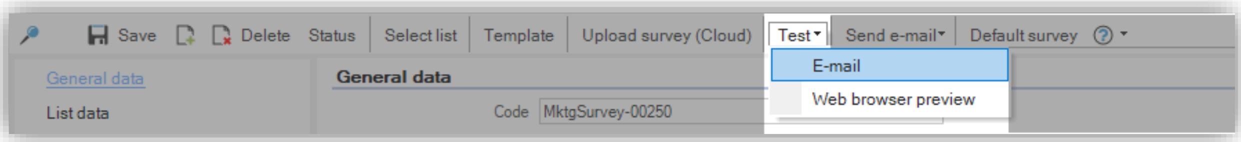


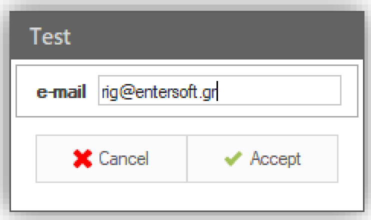
6. Test survey campaign

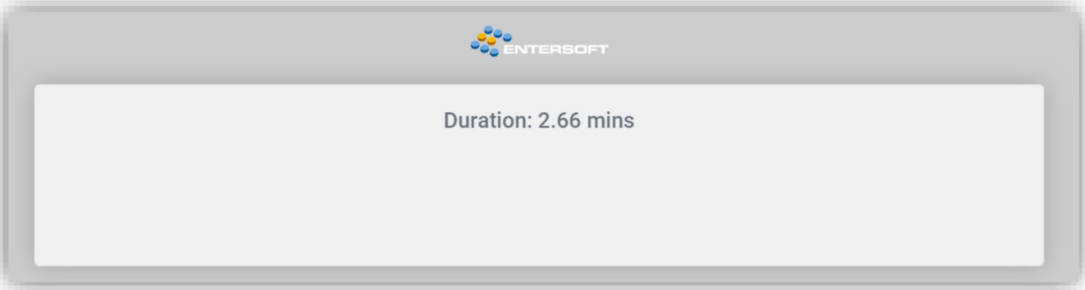
After uploading the survey to cloud and before sending the invitation emails for conducting the survey, you can test both the invitation email and the questionnaire by selecting Test on the survey campaign toolbar. By clicking on the E-mail option on the pop-up menu and a window is shown asking you to fill out the recipient's email. By default, the email is filled out with the email of the current user.

If you want to test only the questionnaire, select Web browser preview and your web browser will show the welcome page of the survey.

After filling out the questionnaire and submitting your answers, a page informing you about the duration of the survey and then you can see the landing page.

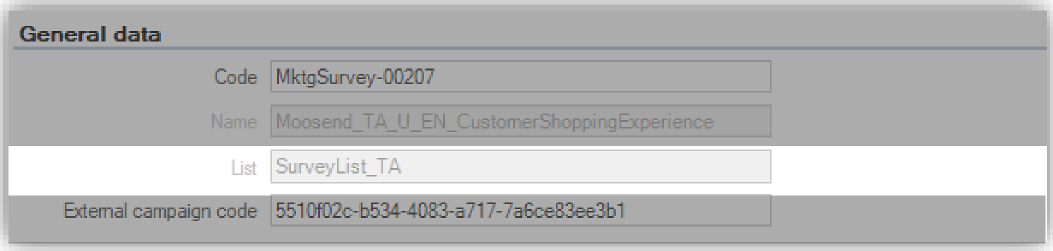






7. Send survey invitation emails

As mentioned earlier in this document, there are two methods of sending invitation emails; through provider and through SMTP. Before sending the invitation emails, the survey data should have been uploaded to cloud and the survey must be addressed to a target group. Specifically, the List field in the survey campaign form should have been defined.



7.1 Trough provider

The available external providers are the MailChimp and Moosend. Before selecting to send the invitation emails through an external provider you must first have defined which external provider you wish to use and the related API key in the company parameters.

For further information about conducting a campaign through an external provider, please read the section 2.2.6 Export the campaign & list of the document CRM_Newsletters-UserGuideEN.pdf in the ESBooks application folder.

Configuration

To define which external provider will be used for sending invitation emails and the related API Key by filling out the Newsletter provider & Newsletter provider authentication key Menu: Configuration... > General > Company parameters > CRM Marketing.

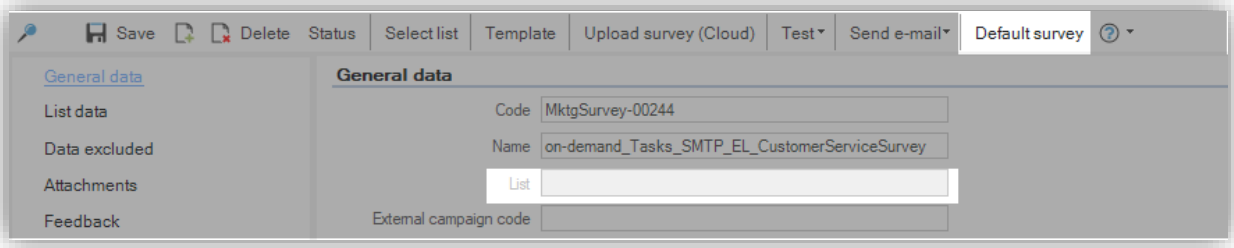
7.2 Trough SMTP

The other available method of sending invitation emails is through SMTP. In this case, when you select Send e-mail > Trough SMTP on the survey campaign toolbar, the mechanism creates as much as the number of the members of the selected list. These e-mails are not sent instantly, but there is the Survey_SendEmail scheduled task (Menu: Configuration and tools > Schedule > Scheduled tasks) that sends the emails when it is programmed to be executed. By default, this task sends the top five hundred emails, though you can change the number according to your needs.

8. On-demand survey invitation email scenarios

A survey campaign could be used for asking customers for their opinion of a specific transaction/purchase or service request. You can use these two business scenarios to measure the level of satisfaction - customer experience. In this context, two views are provided: service request survey and sales transaction survey. These scenarios can use surveys that are not addressed to a target group. In particular, the List field in the survey campaign form should have NOT been defined.

Furthermore, you can set a default survey campaign for each one of the two aforementioned scenarios by selecting Default survey on the survey campaign toolbar. When selecting this action, a dialog box appears asking you to define the scenario you wish this survey to be used for and the code of the survey is saved to the related company parameter, so later on, the code of the survey is predefined in the survey campaign parameter in the parameter panel of the views.



It is important to note here, that import of CRM Zero Image creates two questionnaires regarding the above business use cases. The codes of these questionnaires are the following:

- ES_SESatisfaction – Shopping experience
- ES_SRSatisfaction – Customer service experience.

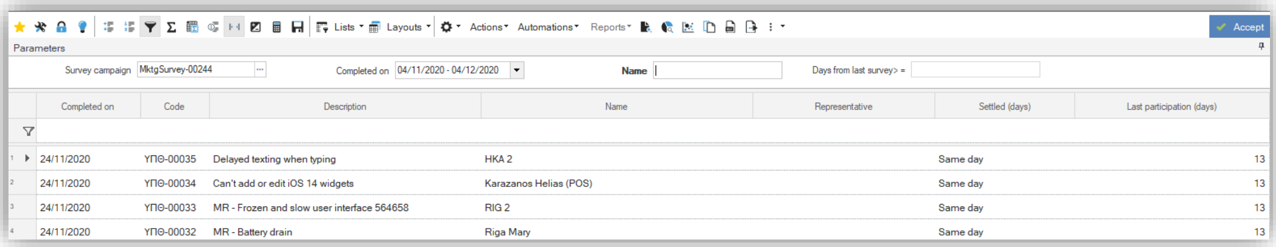
Both questionnaires, include questions that merge your company's name as specified in the relative section. You need to review both questionnaires before using them.

Configuration

The survey code set as default for the requests towards survey scenario is saved to **Default service satisfaction survey code** company parameter, while the survey code set as default for the sales transactions towards survey scenario is saved to **Default shopping experience survey code** company parameter Menu: Configuration… > General > Company parameters > CRM Marketing.

8.1 Service request survey

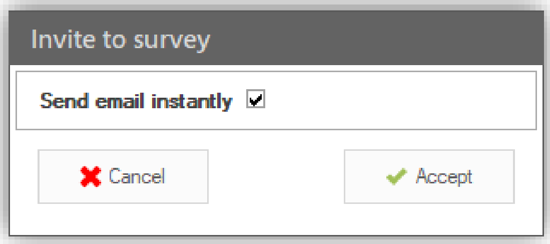
You can access this view through Menu: Marketing > Surveys > Service request survey. This view can be used for searching for service requests based on their completion date (default value ➔ last month), the name of the customer and how long (in days) has been since the customer last participated in a survey (default value ➔ 30 days).



The details shown are the following:

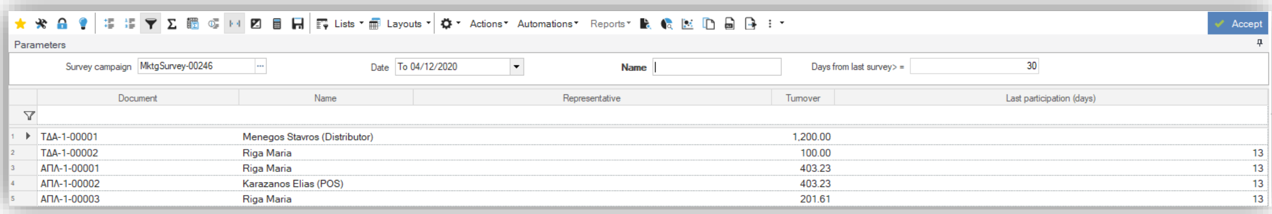
- Completed on – The service request completion date
- Code – The code of the service request
- Description - The description of the service request
- Name – The name of the customer of the service request
- Representative – The representative of the service request
- Settled (days) – The settlement days of the service request
- Last participation (days) - How long (in days) has been since the customer last participated in a survey

To send on-demand survey invitation email, select the service requests you want to get feedback about, and select Automations > Invite to survey on the view toolbar. The invitation emails could be sent instantly, otherwise these invitations will be sent though the Survey_SendEmail scheduled task (see section Trough SMTP)



8.2 Sales transaction survey

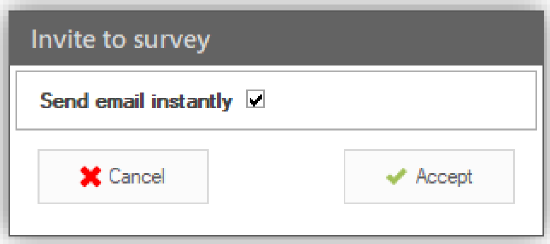
You can access this view through Menu: Marketing > Surveys > Sales transaction survey. This view can be used for searching for sales transactions based on their completion date (default value ➔ last month), the name of the customer and how long (in days) has been since the customer last participated in a survey (default value ➔ 30 days).



The details shown are the following:

- Document - The document code
- Name - The name of the customer of the service request
- Turnover - The document's turnover
- Last participation (days) - How long (in days) has been since the customer last participated in a survey

To send on-demand survey invitation email, select the sales transactions you want to get feedback about, and select Automations > Invite to survey on the view toolbar. The invitation emails could be sent instantly, otherwise these invitations will be sent though the Survey_SendEmail scheduled task (see section Trough SMTP)



9. Survey campaign reports

All of the following reports are sections in the survey campaign forms.

9.1 Feedback

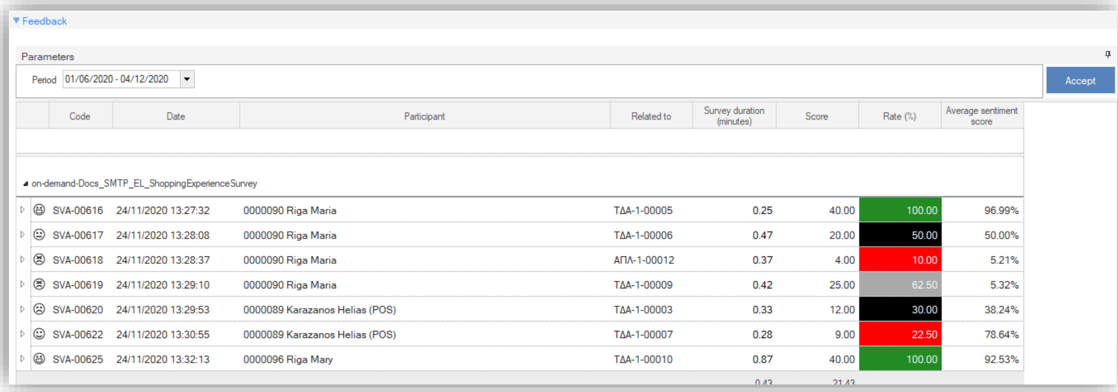
This report is used for getting informed about your audience feedback. The time-period parameter that can be defined is used only by on demand surveys. This report is a two-level view in which the following information is shown:

1st level

- Image related to average sentiment score
- Code - The survey action code
- Date - The date of survey action
- Participant - If the survey is named, then the information of the participant is displayed here
- Survey duration (minutes) - How long did it take the participant to fill out the questionnaire
- Score - Participant's score
- Rate (%) - Participant's score / campaign maximum score. Additionally, there is a background color indicator applied to: Red- Very bad, Black - Bad, Grey -Good, Green - Very good.
- Average sentiment score - In case that one or more questions of free text type included in the questionnaire, then using cognitive services, the average sentiment score of the answers given to these questions is displayed here

2nd level

- Question - The question of the questionnaire
- Reply - The participant's reply
- Sentiment score - If the question is free text type, then then using cognitive services, the sentiment score of the given answer is displayed here
- Image related to sentiment score



9.2 Survey participants

This report is used for getting informed about the members participated in the survey campaign. The time-period parameter that can be defined is used only by on demand surveys. The following information is shown:

- Code – The marketing response code
- Participant – If the survey is named, then the information of the participant is displayed here
- Related to – This column is shown only when the survey has been conducted for on-demand scenarios (see section *On-demand survey invitation email scenarios*) and shows the code of service request or document related to.

Survey participants

Parameters

Period 01/06/2020 - 08/12/2020

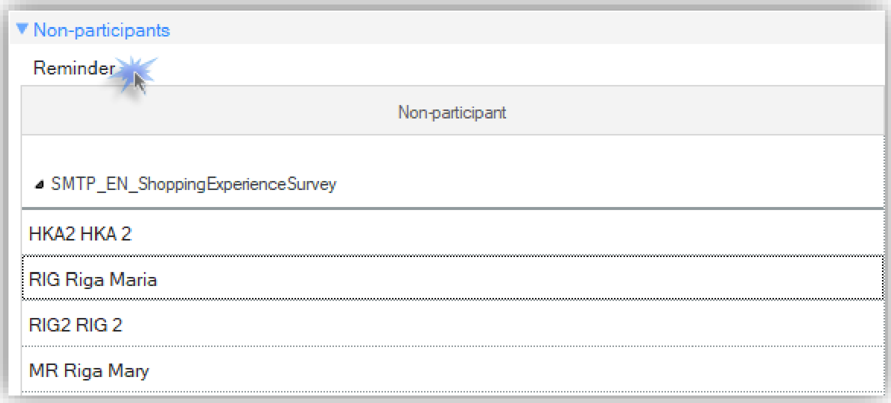
Code	Participant	Related to
on-demand-Docs_SMTP_EL_ShoppingExperienceSurvey		
MRKRES-00368	0000090 Riga Maria	ΤΔΑ-1-00006
MRKRES-00369	0000090 Riga Maria	ΑΠΛ-1-00012
MRKRES-00370	0000090 Riga Maria	ΤΔΑ-1-00009
MRKRES-00372	0000089 Karazanos Helias (POS)	ΤΔΑ-1-00004
MRKRES-00373	0000089 Karazanos Helias (POS)	ΤΔΑ-1-00007
MRKRES-00374	0000098 RIG 2	ΤΔΑ-1-00011
MRKRES-00376	0000096 Riga Mary	ΤΔΑ-1-00010

9.3 Survey non-participants

This report is used for getting informed about the members that have not responded. This information is available only when the survey is addressed to a target group.

- Participant – The information of the participant is displayed here

Through the Reminder action on the top of the view, you can send the survey invitation again as kind reminder, The emails are not sent instantly, but there is the Survey_SendEmail scheduled task (Menu: Configuration and tools > Schedule > Scheduled tasks) that sends the emails when it is programmed to be executed.



9.4 Survey response analysis

You can this dashboard to measure the performance of your survey campaign using very important key figures. As previously mentioned in this document, the key scenarios covered are surveys addressed to a target group and surveys conducted on-demand for customer service request experience or shopping experience (Sales transaction survey).

Attention!

For surveys that the related invitation emails have been sent through an .external provider, you need to import all statistics (on the survey campaign toolbar, select Send e-mail > Through provider > Import statistics) before viewing this dashboard.

9.4.1 Targeted surveys key figures

The survey key figures displayed in this case scenario are the following:

- Weighted score - The average weighted score of the survey campaign
- Sentiment score - The average sentiment score of the survey campaign
- Audience count - The number of the members of your audience
- Sent emails
    - Count - The number of sent emails
    - Percentage - The percentage of sent emails
- Responses
    - Count - The number of responses
    - Percentage - The response rate

Moreover, you can see the sentiment score analysis by clicking on the investigation button. A new dashboard is shown displaying how the participants are allocated to the sentiment score tiers based on their answer average sentiment score. If the responses are named, by clicking on a tier, then the following are displayed in a table:

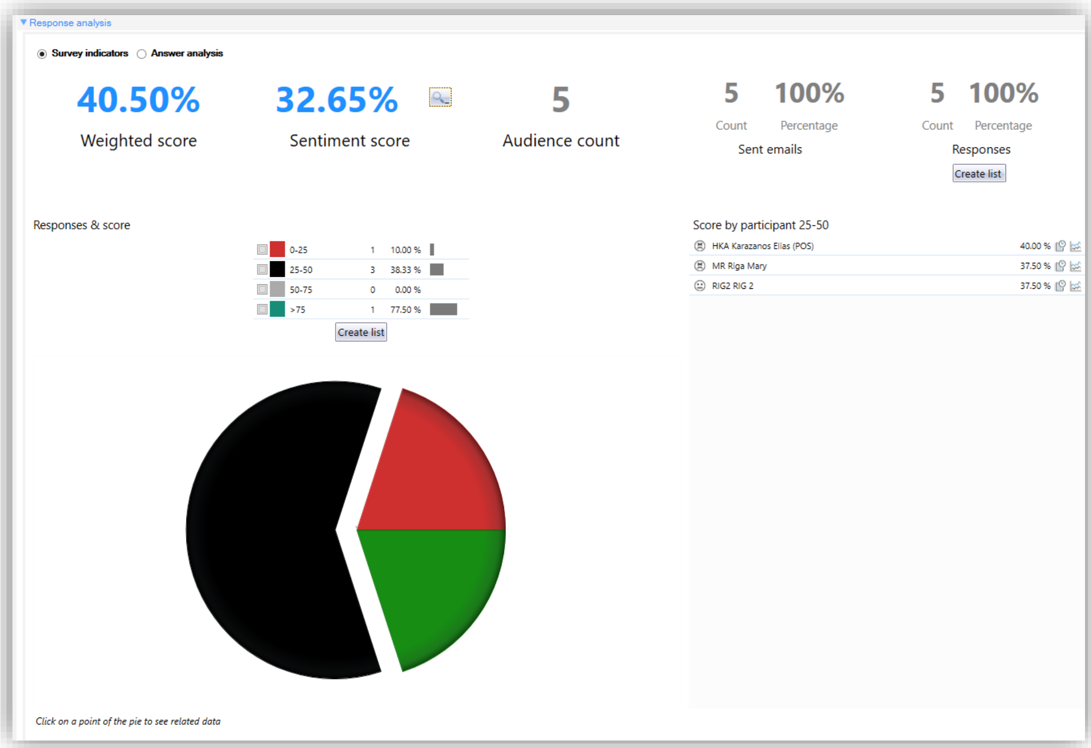
- Date - Survey action date
- Code - Survey action code
- Participant - Participant's information
- Duration bar chart
- Sentiment score percentage
- Sentiment score bar chart

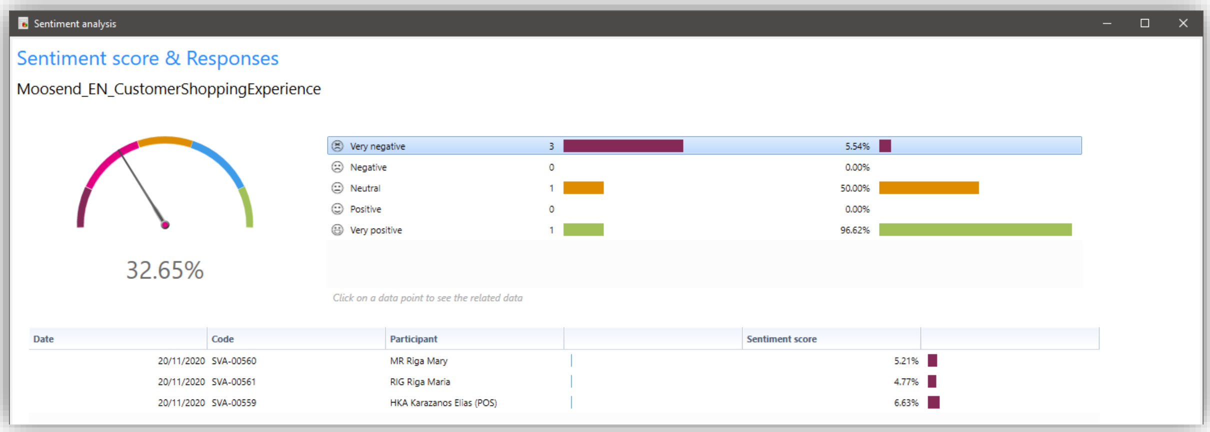
In addition to the above indicators a table is provided to display the number of participants categorized based on their score into tiers. If the responses are named, then you can select the participants of one or more tiers and create a new target group through the Create list button placed under the table. Also, the information in the table is displayed in a pie chart. By clicking on a slice of the pie chart, if the responses are named then the participants' information is displayed in a grid.

Moreover, if the type of your audience list analyzed in this dashboard is trade account, then in the grid you can by clicking on you can see the trade account's timeline, while clicking on the you can see the trade account's score card.

You can create a list of respondents as well, by clicking on the Create list button placed under the responses indicator.

Finally, you can see the answer analysis on the 'Answer analysis' tab.





9.4.2 On demand surveys key figures

You can use this page to analyze in a comparative period mode the most important key figures of an on-demand survey. In this context, you may examine if the satisfaction rate in increased or decreased. You may change the comparison period using right click action 'Parameters'.

The survey key figures displayed in this scenario are the following:

- Weighted score - The average weighted score of the analysis period compared to the average weighted score of comparison period
- Sentiment score - The average sentiment score of the analysis period compared to the average sentiment score of the comparison period
- Sent emails - The number of emails sent the analysis period compared to the number of emails sent the comparison period
- Responses -The number of responses received the analysis period compared to the number of responses received the comparison period, as well as the response rate compared to the same time periods.

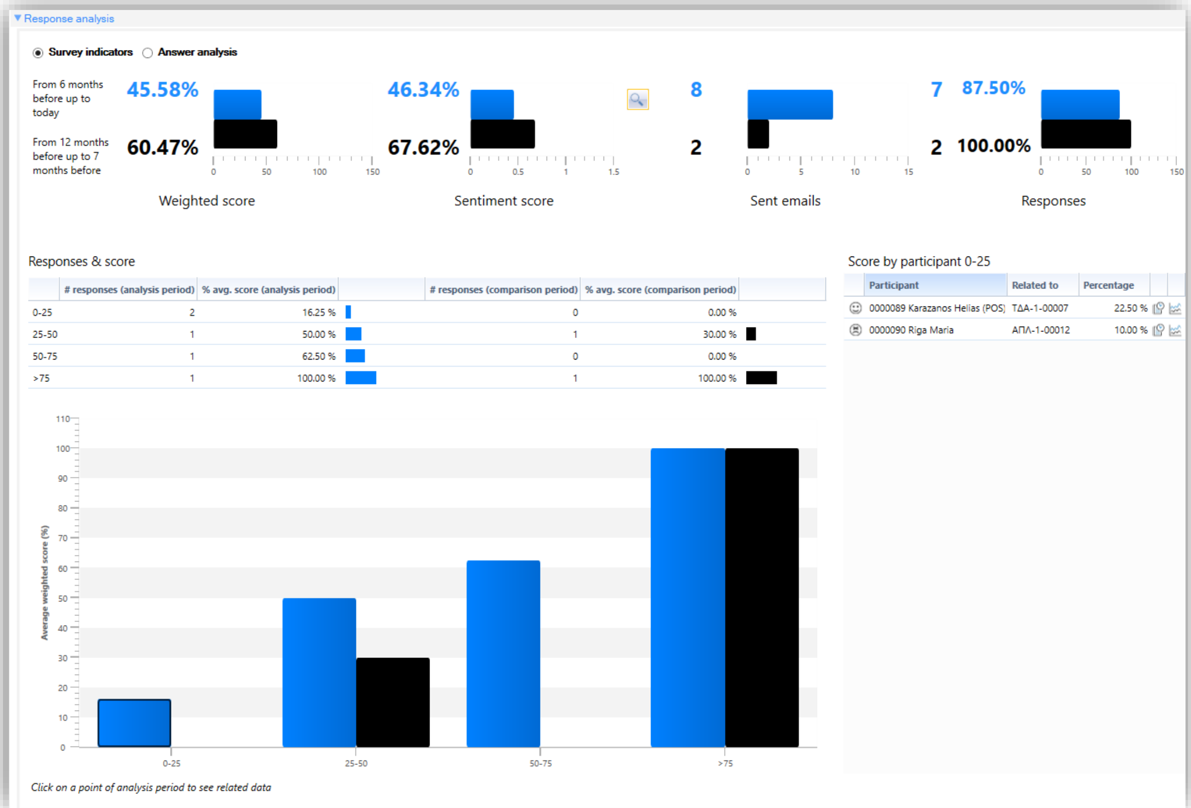
Moreover, you can see the sentiment score analysis by clicking on the investigation button. A new dashboard is shown displaying how the participants are allocated to the sentiment score tiers based on their answer average sentiment score. If the responses are named, by clicking on a tier, then the following are displayed in a table:

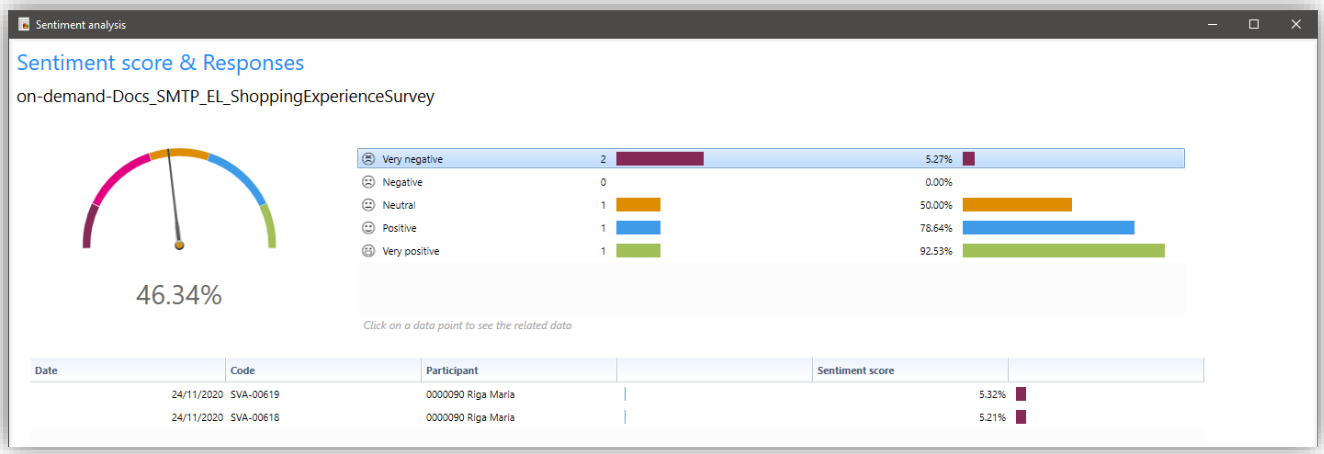
- ➢ Date - Survey action date
- ➢ Code - Survey action code
- ➢ Participant - Participant's information
- ➢ Duration bar chart
- ➢ Sentiment score percentage
- ➢ Sentiment score bar chart

In addition to the above indicators, a table is provided to display the number of participants categorized based on their score into tiers for the analysis period compared to the comparison period. Also, the information in the table is displayed in a column chart. By clicking on a column of the analysis period (ocean blue column), if the responses are named then the participants' information and the related service request or document code are displayed in a grid.

Moreover, in this grid, by clicking on you can see the customer's timeline, while clicking on the you can see the customer's score card. Timeline and scorecard options are available for customer target group.

Finally, you can examine the responses using the 'Answer analysis' tab.





Attention!

For the calculation of sentiment score, you need to purchase from Entersoft Cloud services the keys for using **Microsoft Text Sentiment Analysis service** & **Microsoft text translation service**.

Configuration

For the calculation of sentiment score, the **Key for using Microsoft Text Sentiment Analysis service & Key for using Microsoft text translation service** company parameter need to be filled out Menu: Configuration… > General > Company parameters > Content management parameters.