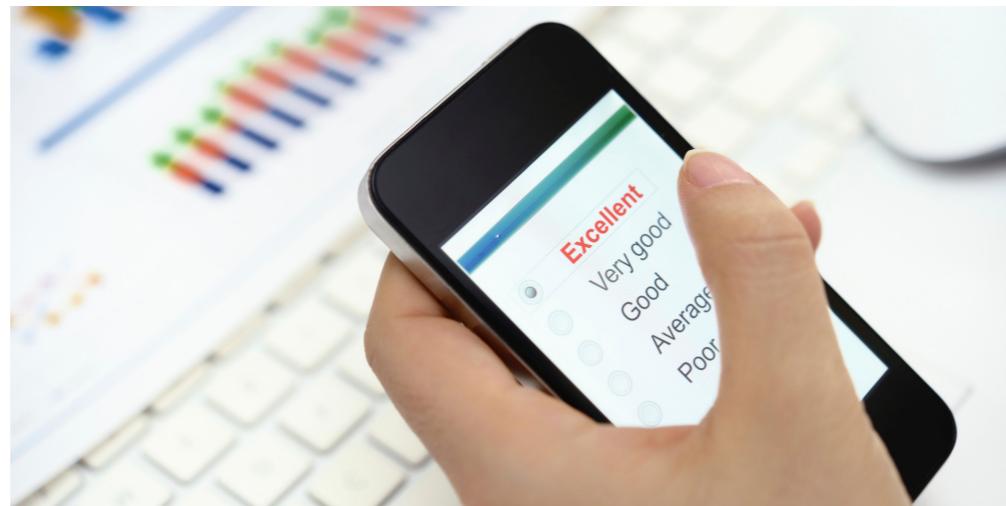
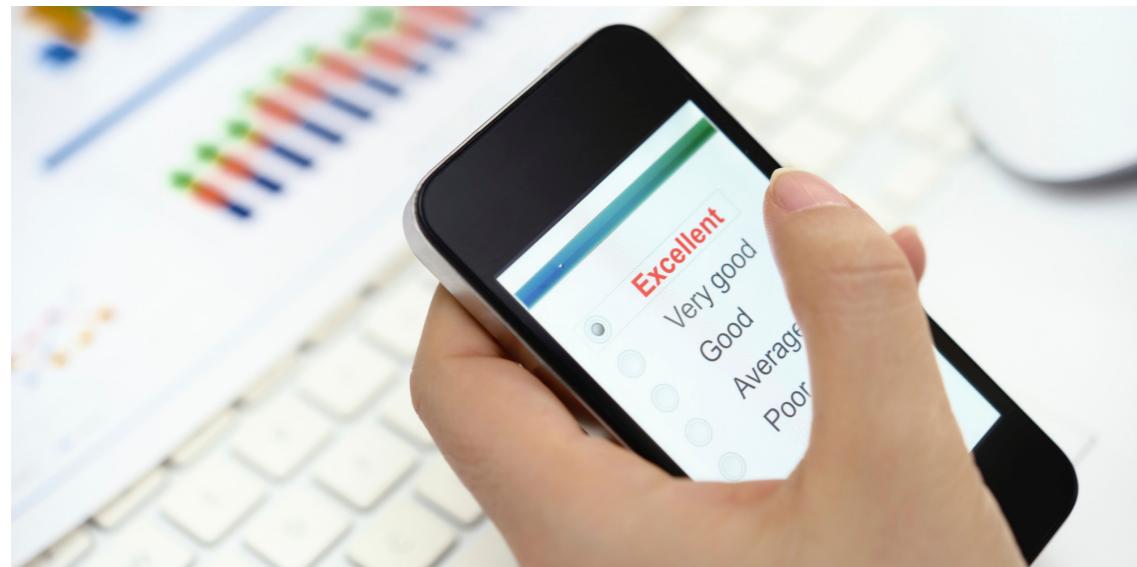


# Checkbox Programming 101

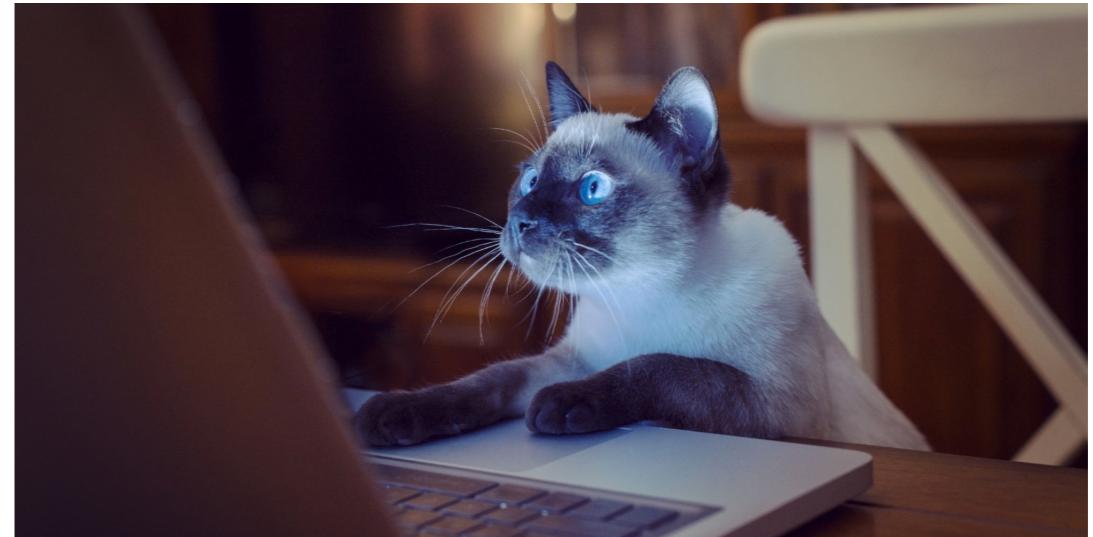


KAT (DJ KATTY MO) MORGAN  
DATA SCIENTIST

# CHECKBOX PROGRAMMING



## COURSE OVERVIEW



The purpose of this class is to provide the essential programming skills needed to create a survey in Checkbox. This course is not designed to teach you how to write a survey, rather program one once it's written. Data Scientist, Marketers, Project Managers, ANYONE who has no experience programming in Checkbox and would like to know how, can benefit.

### COURSE OBJECTIVES

At the end of this course you will be able to:

- Build a basic survey using common survey question types (i.e. checkbox, radio button, rank order)
- Add page branching and survey item conditions
- Merging of answer choices

If you don't already have a Checkbox ID, send a note to Kat:

[REDACTED]

# HAIRBALLS CAT BOUTIQUE

Your new client, Sophia, is the CMO of Hairballs Cat Boutique located in the big city of Dallas, Georgia. She's been serving the kitty community for 5 years. Sales year-over-year have decreased 20% and she's looking for new ways to market to her current customers and attract new customers.

She thinks there's an opportunity to expand her assortment to include a kitty fashion line but is unsure of the market size. She's asked you to create a survey to get a feel for how many cat owners in the Dallas area have ever purchased cat clothes and how much they typically spend.

You worked with her marketing team and collaborated on the survey shown on the right. You have a list of customers to survey, so all that's left is to program.

What are you waiting for? Let's get started right MEOW!



## HAIRBALLS CAT BOUTIQUE - SURVEY QUESTIONS

### INTRODUCTION

Thank you for taking the time to complete this 5-minute survey to help us serve you better. We value your input! [MESSAGE BOX](#)

1. What type of pet do you currently own? [\[CHECKBOX, RANDOMIZED, IF Q1 ≠ CAT OR NONE OF THE ABOVE THEN TERMINATE\]](#)  
Dog, Cat, Fish, Bird, Reptile, Other [\[ANCHOR\]](#), None of The Above [\[ANCHOR\]](#)
2. Please check all the items below that pertain to you and your cat. Have you ever...? [\[CHECKBOX, RANDOMIZED\]](#)
  - a. Celebrated your cat's birthday and/or adoption date?
  - b. Included your cat in a holiday card?
  - c. Talked to your cat?
  - d. Upload a picture or video of your cat to social media?
  - e. Purchased clothing for your cat? Includes holiday costumes.
  - f. Left the TV on for your cat?
  - g. Taken your cat shopping with you?
  - h. None of the above [\[ANCHOR\]](#)
3. On average, how much do you spend in a year on your cat (food, vet visits, boarding, treats...) [\[OPENEND SHORT, ANSWER FORMAT = INTEGER\]](#)
4. (a) Thinking of the [\[PIPE Q3\]](#) you spent on average, what percent was spent on clothes including holiday costumes? Enter percentages as whole numbers (e.g. 20% is 20). [\[OPENENDED SHORT, ANSWER FORMAT = INTEGER, MAX=1, SHOW IF Q2 = e\]](#)  
(b) Thinking of the [\[PIPE Q3\]](#) you spent on average, what percent was spent on non-essential items (e.g. treats and toys)? Enter percentages as whole numbers (e.g. 20% is 20). [\[OPENENDED SHORT, ANSWER FORMAT = INTEGER; MAX=1, SHOW IF Q2 ≠ e\]](#)
5. When thinking about the reasons for owning a cat, how important are the following, where 1 is Not Important and 5 is Extremely Important. [\[MATRIX RATING\]](#)

	Not Important 1	2	Somewhat Important 3	4	Extremely Important 5
Brings my family closer together					
Relaxation/relieves stress					
Keeps bugs/rodents away					
Security					
Companionship/love/company					
Walking/jogging/exercise					
They keep me entertained					

[\[COMPLETE CLOSE\]](#) Thank you for taking this survey. Your responses are greatly appreciated!

[\[TERMINATION CLOSE\]](#) Thank you for choosing to take this survey. We have reached a maximum number of responses and will not need additional responses at this time. Please watch for more opportunities to provide feedback in the future!

# STARTING A NEW SURVEY

Setting up a new survey in Checkbox is super easy! “You’ve got to be kitten me,” you say? No, fur reals! In just a few simple steps you will be ready to rock and roll! In this short chapter I will show you how to create a new survey and add pages.



## SECTION 1

# SURVEY PROGRAMMING LANGUAGE

Before programming your survey, it's important to sit down with the creators of the survey and add any programming notes. I like to type my programming notes in a different font color. In our survey I have the programming notes in **BLUE**.

1. What type of pet do you currently own? [CHECKBOX, RANDOMIZED, IF Q1 ≠ CAT OR NONE OF THE ABOVE THEN TERMINATE]  
Dog, Cat, Fish, Bird, Reptile, Other [ANCHOR], None of The Above [ANCHOR]

Before moving on, let me run through my survey programming key and some common programming definitions.

The formula for my programming notes next to a QUESTION looks something like this:

[QUESTION TYPE, QUESTION BEHAVIOR, SKIP LOGIC].

**QUESTION TYPE** refers to they type of question I'll need to program, Checkbox, Radio Button, Matrix... We will review different question types in Chapter 2.

**QUESTION BEHAVIOR** refers to any kind of special actions I need to add to that particular question or answer choices, like make required (the respondent has to answer before moving on) or randomize (put the answer choices in a different order for each respondent).

**SKIP LOGIC** refers to conditions I need to apply to that question, like only show for particular respondents, or conditions to that page, like skip the respondent to the end. (see more in Chapter 3).

## COMMON SURVEY PROGRAMMING TERMS

**Alias:** The alias is used to create a shortened form of the question or answer.; we're not going to worry about them for this class

**Anchor:** Keeps the answer choice at the bottom of the list and it is NOT randomized; usually applies to "Other" and "None of The Above"

**Branching:** Survey logic that allows you to skip to another page or end of the survey based on some condition

**Completion Page:** The last page of the survey

**Conditions:** Survey logic that allows pages or question items to be shown or hidden based on a statement being true

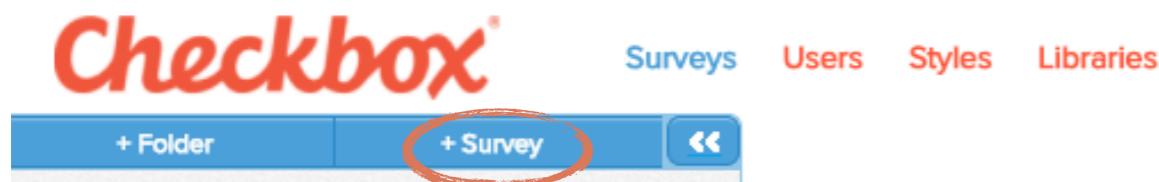
**Merging or Piping:** Pulling data stored somewhere in Checkbox, like the answer to a question, into another area

**Respondent:** A survey taker or participant

## SECTION 2

# CREATE A NEW SURVEY

To create a new survey, start by clicking on the **+Survey** blue button at the top left.



A pop-up window appears and you can add the name of your survey in the box next to **Survey Name**. We will name ours *Hairball Cat Boutique Survey*. For now we will leave the defaults.

The **Style Template** is a drop down box that lets you change the look of the survey. Checkbox has several built in themes that look pretty nice. In a future programming course, I'll show you how to create a custom theme.

You can select the drop down next to **Folder** to save the survey in an existing folder. You can always add a folder and move your survey to it later. When you are ready to save, select **Save**. Note to create a new folder with their name

Our new survey has been created with one blank page.

Use the **+Page** blue button at the top left to add more pages.

## PRACTICE

---

1.1 Add a new survey named: Hairballs Cat Boutique\_Your Name.

1.1.2 Add 5 new pages to your survey so you have 6 pages total.

# ADDING SURVEY ITEMS

Here's where the fun starts! In this chapter we will briefly discuss the different types of survey items we will program and how to add 'behaviors' to our questions (e.g. randomizing, making required, adding a *None of the Above* option...). Let's stop *purrcatstinating* and get right into it!



## SECTION 1

# ADDING A MESSAGE BOX

Now that we have some pages, it's time to add our questions. We will start with our survey intro message: *Thank you for taking the time to complete this 5-minute survey to help us serve you better. We value your input!*

To add an item, select **+ Item** next to the page label in our **Page: 1** box.

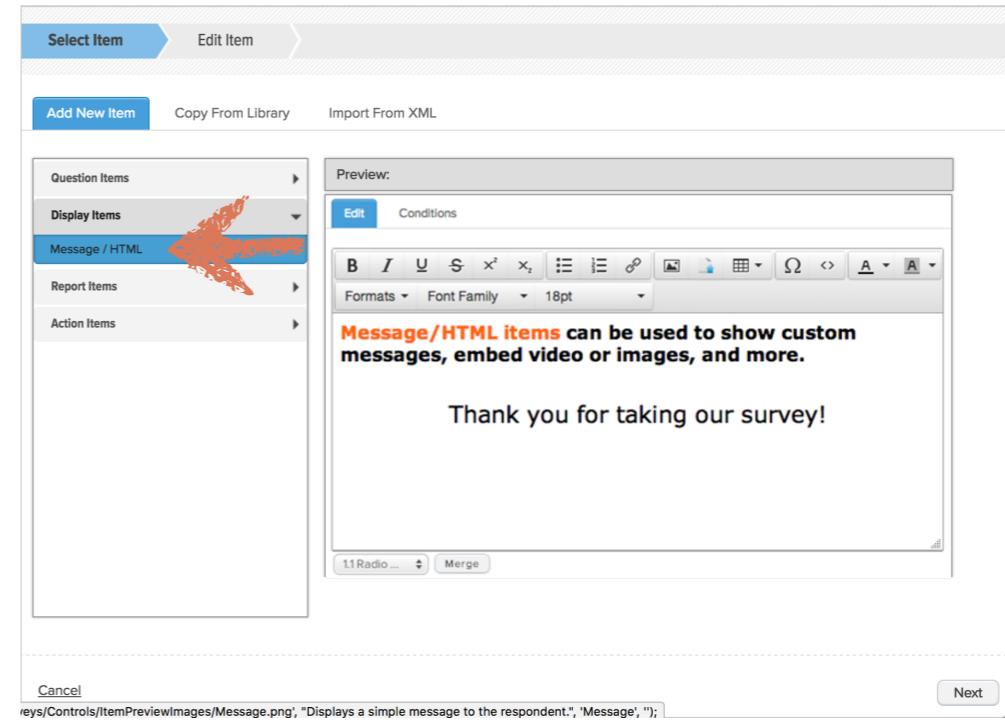


A pop-up window will appear giving us the option of selecting a survey item from one of 4 categories:

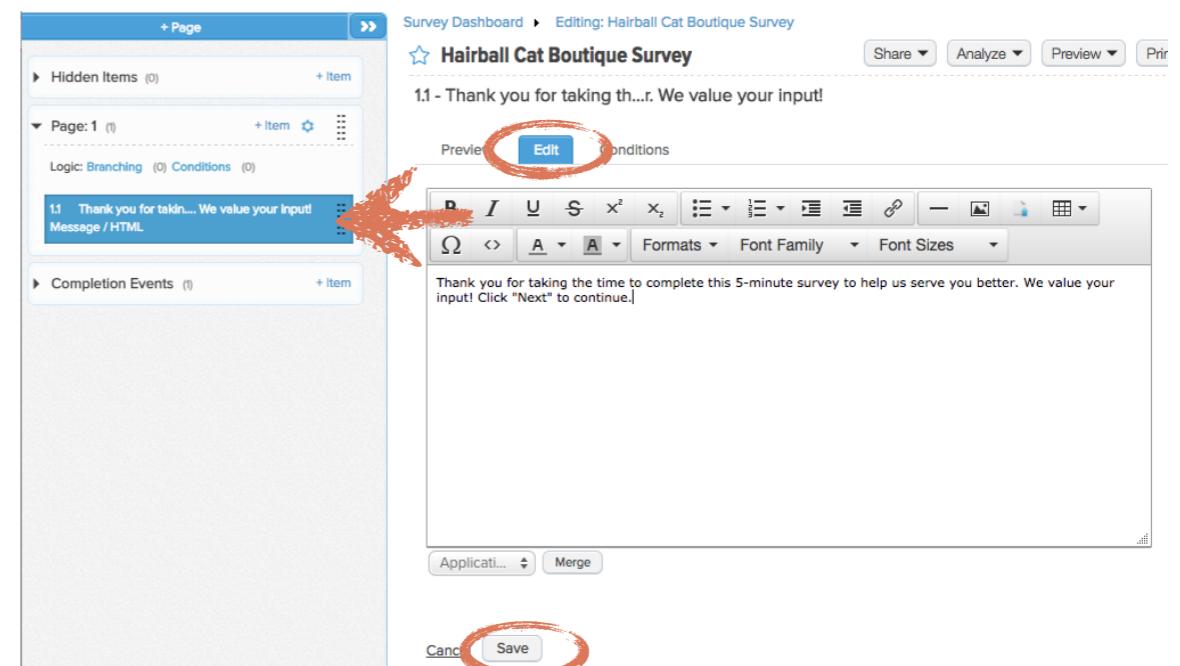
1. Question Items (question types like a check box)
2. Display Items (message boxes)
3. Report Items (response summaries)
4. Action Items (triggered emails)

We will focus on the first two items.

Our introduction is really a text box and we can find this under **Display Items** and **Message / HTML**.



Copy your message into the box and save. To make edits to your message, select the item under the page and select the Edit tab. Checkbox does not have an autosave option so be sure to save after editing!



You try by editing your message and add: Click "Next" to continue.

## SECTION 2

# ADD QUESTION ITEMS

Before we move on and start adding our questions, let's talk for a min about the types of questions in our survey.

The first and second questions are CHECKBOX types; also called multiple choice items. We use this type of question when we want to allow the respondent to select multiple answers from our list of answer choices. We can use the **Behavior** tab to make specify the minimum and maximum number of answers a respondent is allowed to select. If we only wanted our respondent to select ONE option, we could use a RADIO BUTTON.

Question 3 and 4 are OPEN-ENDED SINGLE-LINE text. These items are used for collecting a single line of free-form text. On the **Behavior** tab we can set an answer format like date, all numbers, all letters.

Checkbox will validate what the respondent enters to make sure it's a valid format.

Question 5 is a MATRIX that uses a RATING SCALE column. MATRIX items contain rows and columns that make up a grid of questions. Each row & column combination is a unique question. These are helpful when

you want to ask the same question type across a variety of answer choices.

## HAIRBALLS CAT BOUTIQUE - SURVEY QUESTIONS

### INTRODUCTION

Thank you for taking the time to complete this 5-minute survey to help us serve you better. We value your input! [MESSAGE BOX]

1. What type of pet do you currently own? [CHECKBOX, RANDOMIZED, IF Q1 ≠ CAT OR NONE OF THE ABOVE THEN TERMINATE]  
Dog, Cat, Fish, Bird, Reptile, Other [ANCHOR], None of The Above [ANCHOR]
2. Please check all the items below that pertain to you and your cat. Have you ever...? [CHECKBOX, RANDOMIZED]
  - a. Celebrated your cat's birthday and/or adoption date?
  - b. Included your cat in a holiday card?
  - c. Talked to your cat?
  - d. Upload a picture or video of your cat to social media?
  - e. Purchased clothing for your cat? Includes holiday costumes.
  - f. Left the TV on for your cat?
  - g. Taken your cat shopping with you?
  - h. None of the above [ANCHOR]
3. On average, how much do you spend in a year on your cat (food, vet visits, boarding, treats...) [OPENEND SHORT, ANSWER FORMAT = INTEGER]
4. (a) Thinking of the [PIPE Q3] you spent on average, what percent was spent on clothes including holiday costumes? Enter percentages as whole numbers (e.g. 20% is 20). [OPENENDED SHORT, ANSWER FORMAT = INTEGER, MAX=1, SHOW IF Q2 = e]  
(b) Thinking of the [PIPE Q3] you spent on average, what percent was spent on non-essential items (e.g. treats and toys)? Enter percentages as whole numbers (e.g. 20% is 20). [OPENENDED SHORT, ANSWER FORMAT = INTEGER, MAX=1, SHOW IF Q2 ≠ e]
5. When thinking about the reasons for owning a cat, how important are the following, where 1 is Not Important and 5 is Extremely Important. [MATRIX RATING]

	Not Important 1	2	Somewhat Important 3	4	Extremely Important 5
Brings my family closer together					
Relaxation/relieves stress					
Keeps bugs/rodents away					
Security					
Companionship/love/company					
Walking/jogging/exercise					
They keep me entertained					

[COMPLETE CLOSE] Thank you for taking this survey. Your responses are greatly appreciated!

[TERMINATION CLOSE] Thank you for choosing to take this survey. We have reached a maximum number of responses and will not need additional responses at this time. Please watch for more opportunities to provide feedback in the future!

Ok let's get this party started and program our first question. To add a question to a page you click on the **+ Item** for the page of interest, then select your question type from the pop-up menu.



If you are unsure what a particular question item is, click on it and a preview of the item will display in the **Preview** pane along with a quick definition.

Under **Question Items**, select **Checkbox**.

In the **Question Text** box type our question: *What type of pet do you currently own?* In the Choices tab, type each of our answer choices: *Dog, Cat, Fish, Bird, Reptile*. We will add the *Other* and *None of the Above* in a second. Be sure to hit the orange + button or *Enter* to save your last answer selection.

Next, navigate to the **Behavior** tab.

1. Add **1** to **Min. To Select** to make this question required.
2. Check **Randomize Options** to randomly reorder the answer options each time the survey is opened.
3. Check **Allow Other** to allow respondents to enter their own answer. The default text, **Other:**, in the “**Other**” **Prompt** box can be changed. This option will be anchored to the bottom, meaning it will not be randomized and will always be at the bottom of the list.
4. Check **Allow “None Of The Above”** to allow respondents to select that none of the options apply to them AND ensure that no other options are also selected.

## PRACTICE

---

2.21 On a new page 2, Add our first Checkbox survey question, Q1.

Question: What type of pet do you currently own?

Choices: Dog, Cat, Fish, Bird, Reptile

Behavior

- Allow “Other” and “None of the above”
- Randomize
- Required

2.22 On a new page 3, Add our second Checkbox survey question, Q2.

Question: Please check all the items below that pertain to you and your cat.  
Have you ever...?

Choices

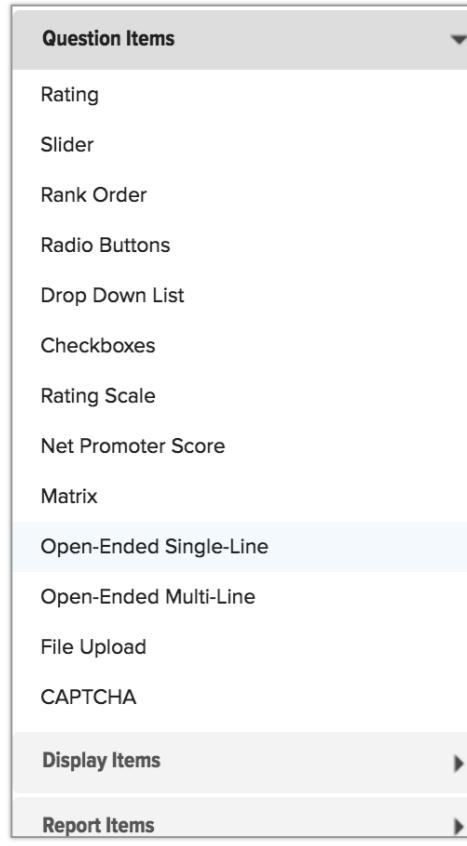
- Celebrated your cat’s birthday and/or adoption date?
- Included your cat in a holiday card?
- Talked to your cat?
- Uploaded a picture or video of your cat to social media?
- Purchased clothing for your cat? Includes holiday costumes.
- Left the TV on for your cat?
- Taken your cat shopping with you?

Behavior

- Allow “None of the above”
- Randomize
- Required

this on a new page 4. Adding this item is the same first step as our Checkbox, select the **+Item** on the **Page 4** bar.

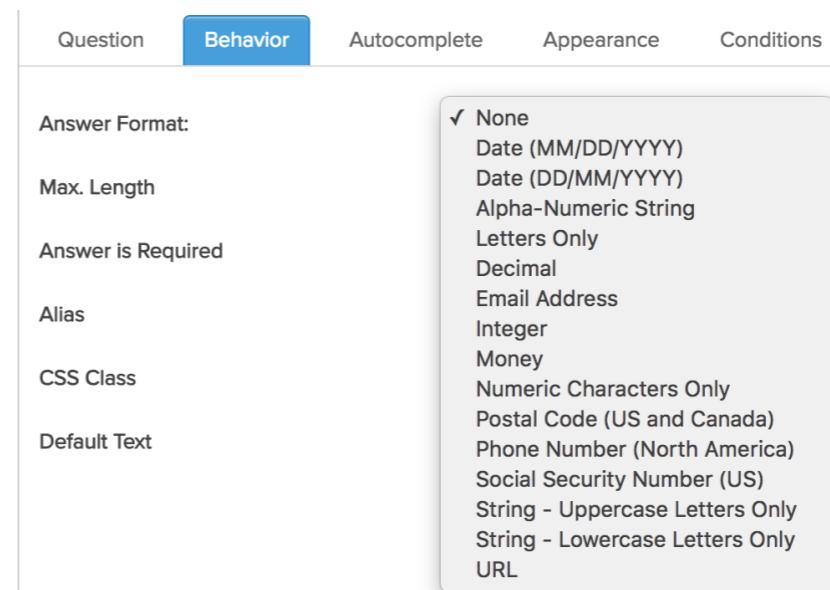
Under **Question Items**, select **Open-Ended Single-Line** and **Next**.



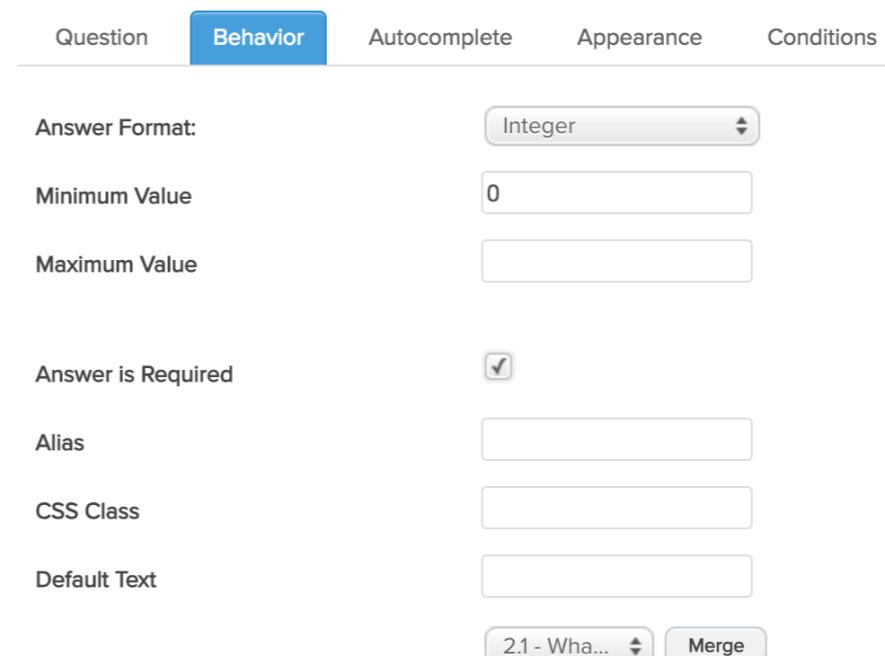
In the question type box, copy our question: *On average, how much do you spend in a year on your cat (food, vet, visits, boarding, treats...)?*.

Next, navigate to the Behavior tab. To help save some data cleaning steps, we are going to set the answer type so the respondent is forced to enter an integer. Leaving the question as is, we could get data back that looked like: *30, thirty dollars, \$30.50, a lot, I don't know my cat has its own credit card*. After the survey responses are collected, someone has to try to interpret all that. Ain't nobody got time for that!

The **Answer Format** drop down allows you to add validation that forces certain answer formats which help cut down on data entry errors. Options include:



We will select the validation rule **Integer**. This question is required so we will check the box next to **Answer is Required**. We also only want positive amounts so let's add a 0 in the **Minimum Value** box.



## PRACTICE

2.23 On a new page 4, add our first open-ended single-line survey question, Q3.

Question: On average, how much do you spend in a year on your cat (food, vet visits, boarding, treats...)?

### Behavior

- Answer Format: Integer
- Minimum Value: 0
- Required

2.24 On a new page 5, add two open ended questions, Q4. For now, don't worry about the programing note in blue; just copy as is.

Question 1: Thinking of the [PIPE Q3] you spent on average, what percent was spent on clothes including holiday costumes? Enter percentages as whole numbers (e.g. 20% is 20).

Question 2: Thinking of the [PIPE Q3] you spent on average, what percent was spent on non-essential items (e.g. treats and toys)? Enter percentages as whole numbers (e.g. 20% is 20).

### Behavior

- Answer Format: Integer
- Minimum Value: 0
- Maximum Value: 100

**Matrix** items contain rows and columns which make up a grid of questions. These question types are super handy when you want to ask a similar question across a variety of choices. For example, in our survey we want to understand the importance of owning a cat across a variety of reasons.

5. When thinking about the reasons for owning a cat, how important are the following, where 1 is Not Important and 5 is Extremely Important. [\[MATRIX RATING\]](#)

	Not Important 1	2	Somewhat Important 3	4	Extremely Important 5
Brings my family closer together					
Relaxation/relieves stress					
Keeps bugs/rodents away					
Security					
Companionship/love/company					
Walking/jogging/exercise					
They keep me entertained					

If we didn't use a matrix, we'd have to ask the same question 7 different times and it would look something like this to the our survey respondents:

When thinking about the reasons for owning a cat, how important is 'Brings my family closer together,' where 1 is Not Important and 5 is Very Important.

Not Important	Somewhat	Extremely Important		
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
1	2	3	4	5

When thinking about the reasons for owning a cat, how important is 'Relaxation/relieves stress,' where 1 is Not Important and 5 is Very Important.

Not Important	Somewhat	Extremely Important		
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
1	2	3	4	5

When thinking about the reasons for owning a cat, how important is 'Keeps bugs/rodents away,' where 1 is Not Important and 5 is Very Important.

Not Important	Somewhat	Extremely Important		
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
1	2	3	4	5

When thinking about the reasons for owning a cat, how important is 'Security,' where 1 is Not Important and 5 is Very Important.

Not Important	Somewhat	Extremely Important		
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
1	2	3	4	5

When thinking about the reasons for owning a cat, how important is 'Companionship/love/company,' where 1 is Not Important and 5 is Very Important.

Not Important	Somewhat	Extremely Important		
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
1	2	3	4	5

When thinking about the reasons for owning a cat, how important is 'They keep me entertained,' where 1 is Not Important and 5 is Very Important.

Not Important	Somewhat	Extremely Important		
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
1	2	3	4	5

When thinking about the reasons for owning a cat, how important is 'Walking/jogging/exercise,' where 1 is Not Important and 5 is Very Important.

Not Important	Somewhat	Extremely Important		
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
1	2	3	4	5

There's a lot of questions on that page and it could be easy for a respondent to just give up when they get there or feel super annoyed reading the same question over and over.

To add a **Matrix**, click on the +Item on the page bar and select **Matrix**. Copy the survey question in the **Question Text** box on the **Question** tab. Use the (1) **Rows** tab to add each answer choice and (2) **Columns** tab to add the survey question type.

When thinking about the reasons for owning a cat, how important are the following, where 1 is Not Important and 5 is Extremely Important?

On the Rows tab, copy the answer choice in an empty box and hit Enter or the orange + button to add it.

Row	Type	Text	Alias
1	Normal	Brings my family closer together	
2	Normal	Relaxation/relieves stress	

On the Columns tab, select the orange **Add Column** button.

The different type of questions available for a Matrix are listed under Question Items. Select **Rating Scale** and **Next**.

Select Column Type

Question Items

- Sum Total
- Slider
- Radio Buttons
- Drop Down List
- Checkboxes
- Rating Scale**
- Open-Ended Single-Line

Preview:

Rating Scale questions allow you to ask respondents to rate something on a number scale of your choosing.  
You can set a number range, add end & mid-number labels, and enable N/A.

Terrible Fair Great

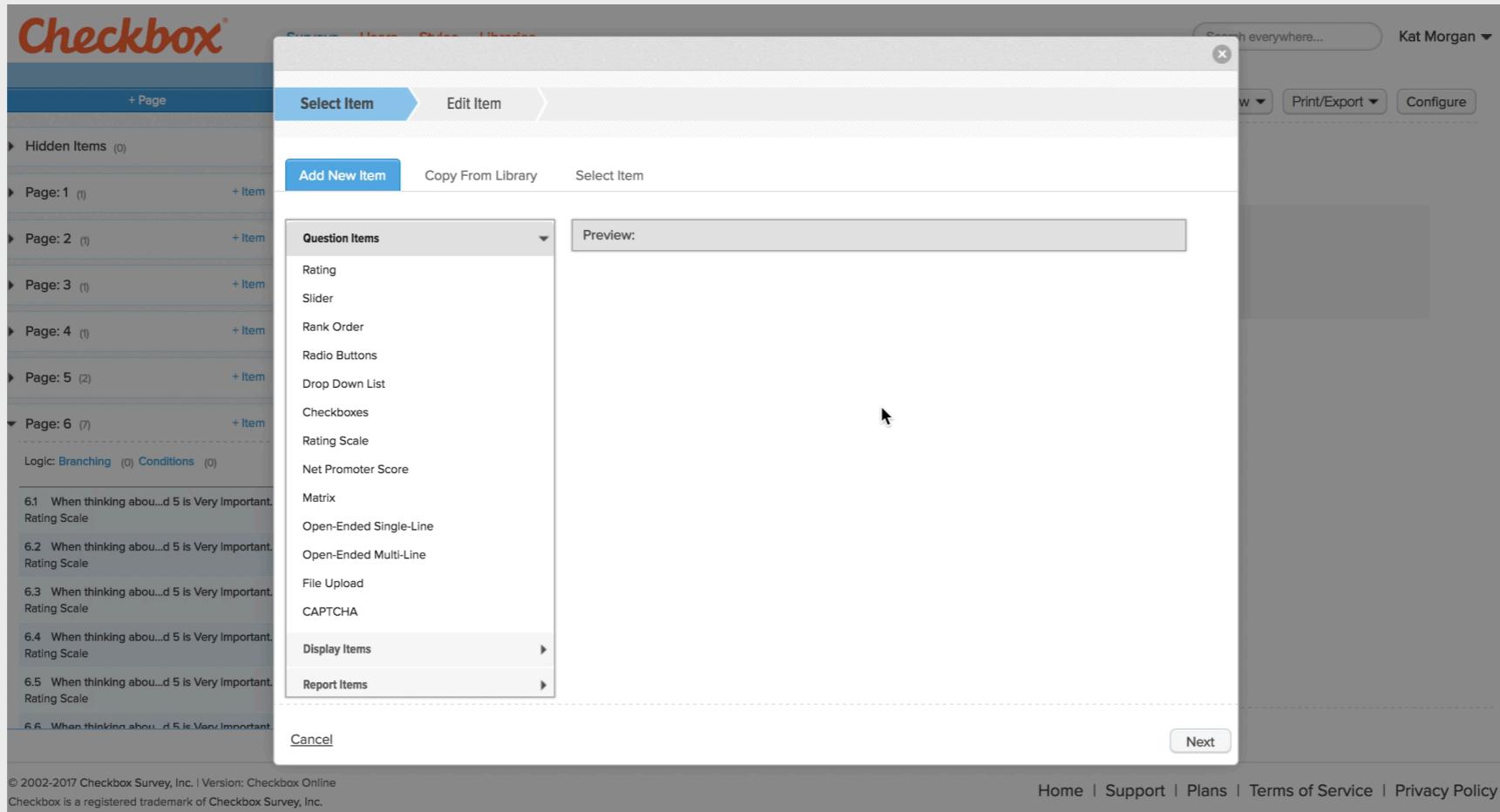
1 2 3 4 5

Cancel

Next

Leave the **Question** box blank and select the **Behavior** tab. You can adjust the rating scale using the **Scale Start Value** and **Scale End Value**. You can add text to the **Scale Start Text**, **Scale Mid Text** and **Scale End Text** to have text appear above the number like Not Important, Somewhat Important, and Extremely Important.

## Adding a Matrix



## PRACTICE

### 2.2.5 Add question 5, a matrix. to Page 6.

Question: When thinking about the reasons for owning a cat, how important are the following, where 1 is Not Important and 5 is Extremely Important?

Column: Rating Scale 1 to 5

Rows:

- Brings my family closer together

- Relaxation/relieves stress
- Keeps bugs/rodents away
- Security
- Companionship/love/company
- Walking/jogging/exercise
- They keep me entertained

Behavior: Required

# ADVANCED PROGRAMMING

In this chapter I will show you how to add page branching and piping into your survey. Thinking through the page skip logic can be frustrating at times, so starting with a positive *catitude* is super important.



## SECTION 1

# MERGING/PIPING

Skip logic and merging answer choices are great ways to customize the survey experience and make sure your respondents only see questions that are relevant to them. Save yourself some headaches and only do this AFTER the survey questions are finalized and all the questions have been programmed. Trust me.

Merging enables you to take text from one source and merge/pipe into another source. Specifically, let's look at merging a survey answer into a future survey question.

In question 3, Q3, of our survey we ask respondents to tell us about how much they spend on average in a year on their cat. In a follow-up question we ask about what percent of that was on clothes. To help our respondents out in remembering how much they spent, and to add some personalization to our survey, we can merge in their response from Q3 into the question text of question 4, Q4.

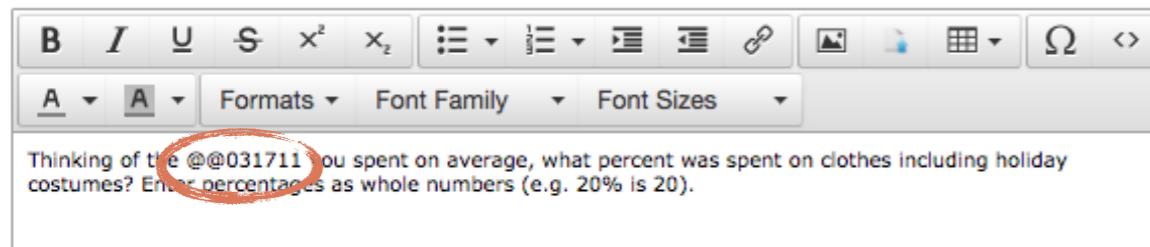
Let's add Q4 to page 5. It's an open-ended single-line question type and to add this we will select **+Item** on our **Page 5** bar.

The screenshot shows the SurveyMonkey Question editor. At the top, it says 'Page: 5 (2)' with a red circle around the '+ Item' button. Below is a text area with a red arrow pointing up to the '[PIPE Q3]' placeholder. A red circle highlights the dropdown menu next to 'Merge'. At the bottom, a red arrow points to the 'Merge' button. The text in the editor reads: 'Thinking of the [PIPE Q3] you spent on average, what percent was spent on clothes including holiday costumes? Enter percentages as whole numbers (e.g. 20% is 20).'

If you haven't already, copy our question into the question text box. To add the respondents answer from Q3 into the question text, put your cursor next to the program note [PIPE Q3] and select the drop down box next to **Merge**.

Select the question response from Q3 which was saved on page 4 then select **Merge**.

You can delete the placeholder programming note, [PIPE Q3]. You should have something that looks like image below where there's placeholder text that starts with @@ followed by some numbers.



## Merging Survey Answers

A screenshot of the SurveyGizmo editor interface. On the left, a sidebar shows the survey structure with pages 1 through 6. Page 4 is currently selected and expanded, showing an item titled '4.1 - On average, how much do you spend in a year on your cat (food, vet visits, boarding, treats...)?' which is an 'Open-Ended Single-Line' type. The right side of the screen shows the detailed configuration for this item, including tabs for 'Preview', 'Question', 'Behavior', 'Autocomplete', 'Appearance', and 'Conditions'. The 'Conditions' tab is active, displaying the note: 'This item will always be displayed.' At the bottom right of the configuration panel are 'Cancel' and 'Save' buttons.

Here's a short video that walks you through the steps from the editor menu.

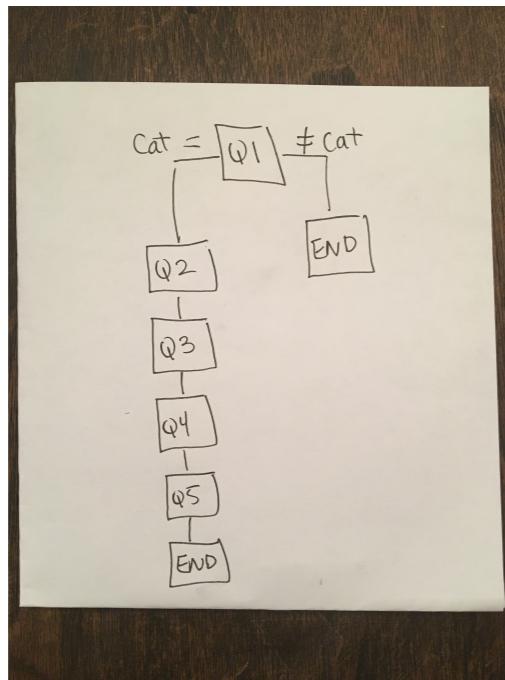
## PRACTICE

3.1 If you've not already added Q4 (from Chapter 2 practice problems), add it and merge/pipe in the answer from Q3.

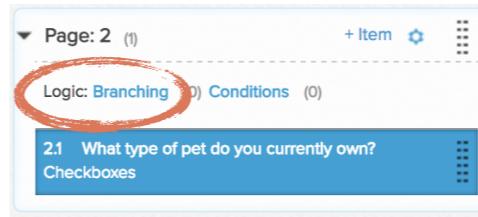
## SECTION 2

# PAGE BRANCHING AND CONDITIONS

For our survey we are only interested in respondents who currently own cats. We can use page branching to screen out those that do not own a cat. Page 2 is where we ask our qualifying question, *What type of pet do you currently own*, and this is where we will add our branch. I find it helpful to draw out the survey flow before adding any branching. Here's what the high level flow of our survey looks like.

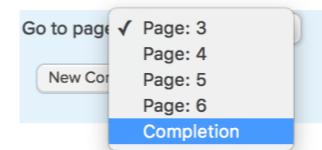


To add a page branch, click on **Branching** from the page that contains the qualifier question.



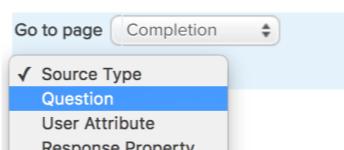
Since we are not interested in collecting responses from non-cat owners, we want to send to the end and have them skip all survey questions. To do this, click on the drop down next to **Go to page** and select **Completion** then the **New Condition** button.

Branching for Page 2



Select **Source Type** and **Question**.

Branching for Page 2



Next to **Question**, we will select the current question programmed, 2.1, **Is Not Equal To**, **Cat**, and **Add**. In plain-ish English this means if someone DID NOT select 'Cat' as a pet they currently own, they are sent to our completion page.



## PRACTICE

3.21 Let's practice more page branching by adding a new question on new page 7 which ask how likely the respondent is to recommend Hairballs Cat Boutique.

Question: How likely are you to recommend Hairballs Cat Boutique to your friends and family? [Net Promoter Score 0 to 10]

Behavior: Required

3.22 Add a new page, page 8, with an open-ended multi-line question which says:

Our apologies for not meeting your needs. Could you please tell us why? Your feedback will help us improve.

3.23 Add page branching such that:

- Respondents who answered 0 to 6 on page 7 are moved to question 8
- Respondents who answered 7Pa - 10 move to the Completion page

I have a short video on the next page that walks you through the page branching of the practice questions once they have been added. No peaking until you've tried it!

## PAGE BRANCHING

Survey Dashboard ▶ Editing: Hairball Cat Boutique Survey

### Hairball Cat Boutique Survey

Share ▾ Analyze ▾ Preview ▾ Print/Export ▾ Configure Item Actions ▾

**7.1 - On a scale of 0 to 10, how likely are you to recommend Hairballs Cat Boutique to your family and friends?**

**Preview** Question Behavior Appearance Conditions

\* On a scale of 0 to 10, how likely are you to recommend Hairballs Cat Boutique to your family and friends?

Not at all likely    Extremely likely

0 1 2 3 4 5 6 7 8 9 10

Conditions:  
This item will always be displayed.

[Cancel](#) [Save](#)

- ▶ Page: 1 (1) + Item ⚙️
- ▶ Page: 2 (1) + Item ⚙️
- ▶ Page: 3 (1) + Item ⚙️
- ▶ Page: 4 (1) + Item ⚙️
- ▶ Page: 5 (2) + Item ⚙️
- ▶ Page: 6 (9) + Item ⚙️
- ▼ Page: 7 (1) + Item ⚙️
- Logic: [Branching](#) (0) [Conditions](#) (0)
- 7.1 On a scale of 0 to 1...ur family and friends?**  
Net Promoter Score
- ▶ Page: 8 (1) + Item ⚙️
- Logic: [Branching](#) (0) [Conditions](#) (0)
- 8.1 Our apologies for n... will help us improve.  
Open-Ended Multi-Line
- ▶ Completion Events (1) + Item

Adding survey item conditions is another way to customize your survey.

**Conditions** are rules to add to your survey items that determine when those items should be shown. We want to add a condition on question 4.a that only shows for customers who selected they have purchased clothes in question 2.

4. (a) Thinking of the [PIPE Q3] you spent on average, what percent was spent on clothes including holiday costumes? Enter percentages as whole numbers (e.g. 20% is 20). [OPENENDED SHORT ANSWER FORMAT = INTEGER, MAX=1, SHOW IF Q2 = e]

To open the survey editor to add a condition, select the question in the left bar.

The screenshot shows the Survey Editor's left sidebar. At the top is a '+ Page' button. Below it are sections for 'Hidden Items (0)', 'Page: 1 (1)', 'Page: 2 (1)', 'Page: 3 (1)', 'Page: 4 (1)', and 'Page: 5 (2)'. Under 'Page: 5 (2)', there are two items: '5.1 Thinking of the @@bers (e.g. 20% is 20). Open-Ended Single-Line' and '5.2 Thinking of the @@bers (e.g. 20% is 20). Open-Ended Single-Line'. A red arrow points from the text above to the '5.1' item. At the bottom of the sidebar, under 'Logic', are 'Branching (0)' and 'Conditions (0)'.

Now click on the Conditions tab.

The screenshot shows the Survey Editor with the 'Conditions' tab selected. A question is displayed: 'Thinking of the @@031711 you spent on average, what percent was spent on clothes including holiday costumes? Enter percentages as whole numbers (e.g. 20% is 20.)'. Below the question, a 'Conditions' section states: 'This item will always be displayed.' At the bottom are 'Cancel' and 'Save' buttons. The 'Conditions' tab is circled in red.

Select **New Condition**.

The screenshot shows the 'New Condition' dialog. It has tabs for 'Basic View' (selected) and 'Advanced View'. Two radio buttons are shown: 'Show Survey Item when ANY of these statements are true.' and 'Show Survey Item when ALL of these statements are true.' The 'ALL' option is selected. A 'New Condition' button is highlighted with a red circle.

In the Source Type drop down, select **Question** and navigate to our checkbox question where we asked about previous purchasing of cat clothes.

The screenshot shows a 'Question' dropdown menu. It lists several questions: '2.1 - What type of pet do you currently own?', '3.1 - Please check all the items that apply to your cat. Have you ever...?', '4.1 - On average, how much do you spend on visits, boarding, treats...?', and '5.2 - Thinking of the @@031711...whole numbers (e.g. 20% is 20.)'. The '3.1' item is highlighted with a blue background.

Select, **Comparison: Is Equal To**, and **Value: Purchased clothing for your cat...**, **Add** and **Save**.

Preview Question Behavior Autocomplete Appearance Conditions

Basic View Advanced View

Show Survey Item when ANY of these statements are true.

Show Survey Item when ALL of these statements are true.

Question 3.1 - Please check all the item...nd your cat. Have you ever...? Is Equal To Add  
Purchased clothing for your cat? Includes holiday costumes.

You can see the condition we just added is shown at the bottom of the preview.

Preview Question Behavior Autocomplete Appearance Conditions

\* Thinking of the @@031711 you spent on average, what percent was spent on clothes including holiday items (not including food)? (The answer is 20).

#### Conditions:

This item will be displayed when:

'3.1 Please check all the item...nd your cat. Have you ever...?' Is Equal To 'Purchased clothing for your cat? Includes holiday costumes.'

[Cancel](#) [Save](#)

## PRACTICE

3.24 Add survey item conditions such that question 4a only shows for customers that selected "Purchased clothing for your cat?..." in question 3.

The next video walks you through the steps.

## ADDING SURVEY ITEM CONDITIONS

The screenshot displays the Checkbox Survey interface. On the left, the Survey Dashboard shows five pages of a survey titled "Hairball Cat Boutique Survey". The pages are:

- Page 1: 1.1 Thank you for takin.... We value your input! (Message / HTML)
- Page 2: 2 items
- Page 3: 1 item, Logic: Branching (0) Conditions (0)
  - 3.1 Please check all the... cat. Have you ever...? (Checkboxes)
- Page 4: 1 item, Logic: Branching (0) Conditions (0)
  - 4.1 On average, how m...s, boarding, treats...? (Open-Ended Single-Line)
- Page 5: 2 items, Logic: Branching (0) Conditions (0)
  - 5.1 Thinking of the @@...bers (e.g. 20% is 20). (Open-Ended Single-Line)
  - 5.2 Thinking of the @@...bers (e.g. 20% is 20). (Open-Ended Single-Line)

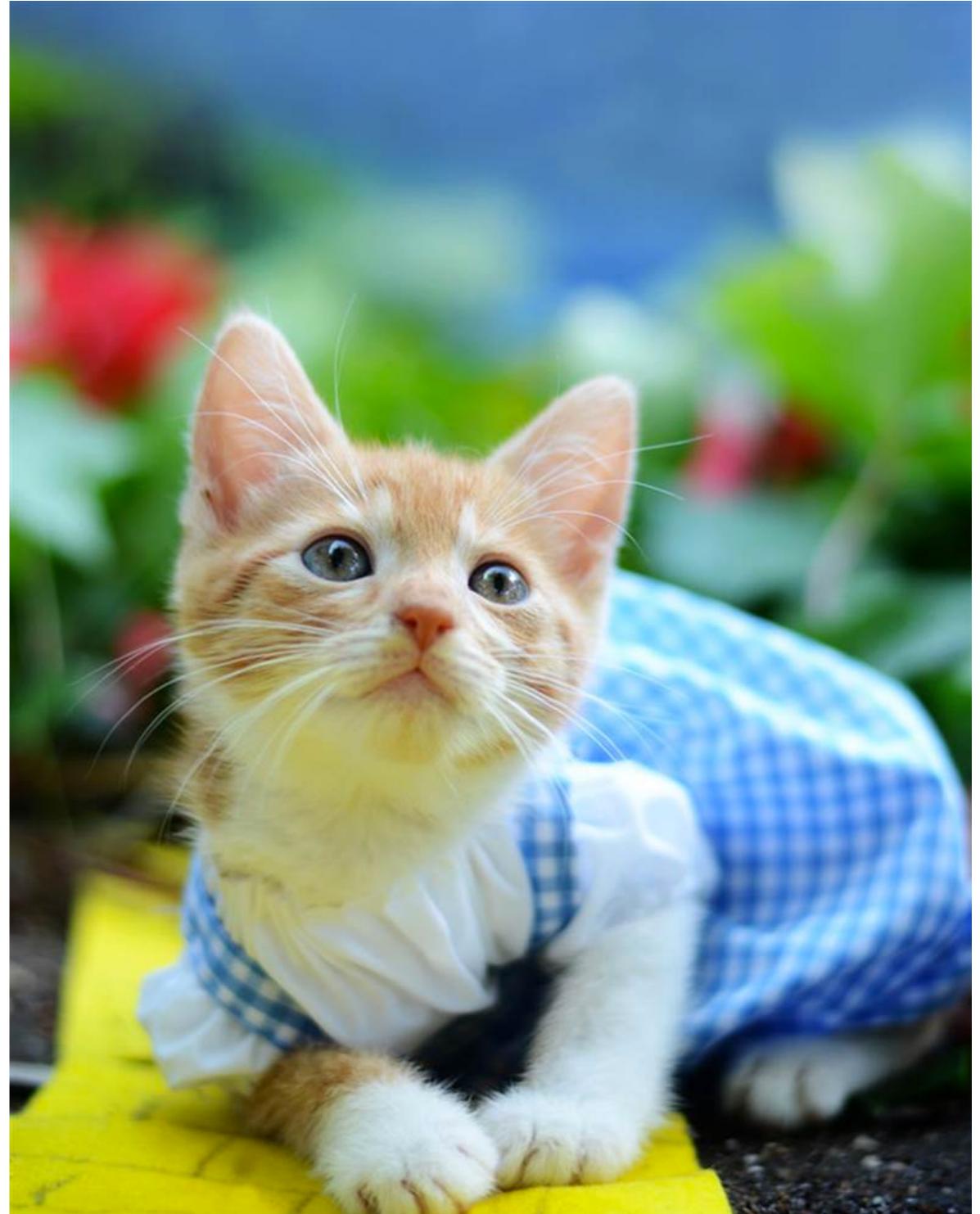
The right side shows the "Survey Preview" for Page 5. It contains two questions:

- \*Thinking of the @@031711 you spent on average, what percent was spent on clothes including holiday costumes? Enter percentages as whole numbers (e.g. 20% is 20).
- \*Thinking of the @@031711 you spent on average, what percent was spent on non-essential items (e.g. treats and toys)? Enter percentages as whole numbers (e.g. 20% is 20).

At the bottom of the preview are "Back" and "Next" buttons. The footer includes copyright information and links to Home, Support, Plans, Terms of Service, and Privacy Policy.

# LAUNCHING YOUR SURVEY

How are you doing? Feeling paw-some? I hope so because you are almost ready to launch your survey! In this chapter we will review how to test your survey and make it active once it's ready to go.

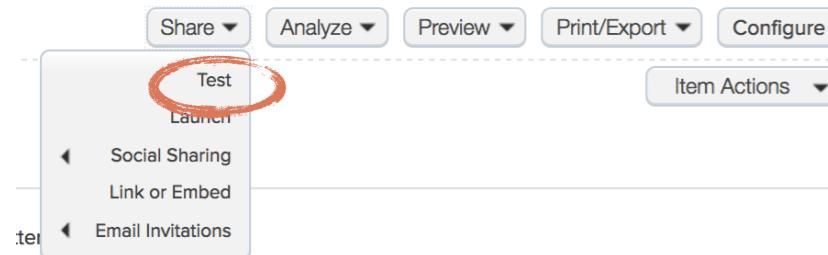


## SECTION 1

# PRE TESTING YOUR SURVEY

It's important to test your survey before distributing to check for potential problems. You need to make sure everything's working as expected.

To test your survey select the drop down menu from **Share**, and **Test**.



The next pop-up contains two links, one that has the name of the survey in the link and another where this is masked. Either one will test your survey. As you see in the red box at the top, these responses will be flagged as a TEST, so it's super easy to filter out when you export the final responses.

A screenshot of a 'Test Survey' window. At the top, a red banner displays the warning: 'All responses collected using these test links will be flagged as TEST RESPONSES, so please DO NOT DISTRIBUTE TEST LINKS TO ACTUAL RESPONDENTS.' Below the banner, a message says 'The custom URL below can also be used to access the survey:' followed by two URLs: 'https://elicitinsights.checkboxonline.com/Hairball-Cat-Boutique-Survey.aspx?forceNew=true&amp;test=true' and 'https://elicitinsights.checkboxonline.com/Survey.aspx?s=03686f263f694e65a4a5373dd46d1668&amp;forceNew=true&amp;test=true'.

Clicking on the link will open your survey in a new tab and you are ready to try it out!

A screenshot of a web browser displaying a survey page. The title bar shows 'Checkbox® 6' and 'Hairball Cat Boutique Survey'. The address bar indicates a secure connection ('Secure') and the URL 'https://elicitinsights.checkboxonline.com/Survey.aspx?s=03686f263f694e65a4a5373dd46d1668&amp;forceNew=true&amp;test=true'. The page content includes a message: 'Thank you for taking the time to complete this 5-minute survey to help us serve you better. We value your input!' and a 'Next' button.

Here are a few tips for testing your survey:

- Send it out to multiple people to review. Each person will find something different and this will give you a good estimate of response time
- Sit with someone completing the survey and ask them to think out loud. This may highlight any issues or confusing questions.
- Test all your skip logic works. Probably a little overkill, but I keep track of my page branching and conditions in an excel document so test it all!

## SECTION 2

# MAKING YOUR SURVEY ACTIVE

Before you can launch your survey, you need to make it active. Selecting **Configure** will open up a new editor that will allow you to make the survey active and configure other survey settings like adding page numbers and a progress bar.



Selecting the checkbox next to **ACTIVE** and turning it from red to green essentially turns your survey “on” and enables you to start collecting responses. You could also set **START** and **END** dates for your survey and set a maximum response size with **TOTAL RESPONSE LIMIT**. The total response count includes ALL respondents who start the survey and not just those that completed the survey. Most of our analysis looks at completes ONLY and excludes those that quit some point during the survey. I monitor responses and deactivate the survey once I reach our completion count.

A screenshot of the 'Basic Info' tab in a survey configuration interface. The 'ACTIVE' checkbox is highlighted with a large red arrow. Other settings shown include 'LOCKED' (unchecked), 'DEFAULT URL' (https://elicitinsights.checkboxonline.com/Survey.aspx?s=03686f263f694e65a4a5373dd46d1668), 'CUSTOM URL' (https://elicitinsights.checkboxonline.com/Hairball-Cat-Boutique-Survey.aspx), 'START DATE' (No Restriction), 'END DATE' (No Restriction), 'TOTAL RESPONSE LIMIT' (No Limit), 'PER RESPONDENT RESPONSE LIMIT' (No Limit), 'SCORED' (unchecked), 'ANONYMIZE' (unchecked), and 'GOOGLE ANALYTICS TRACKING ID' (empty input field).

The Appearance tab is where you can configure the look and feel of your survey. I usually select **SHOW PAGE NUMBERS** and **DISPLAY PROGRESS BAR** so our respondents know how much they have left to do.

A screenshot of the 'Appearance' tab in a survey configuration interface. The 'SHOW PAGE NUMBERS' and 'DISPLAY PROGRESS BAR' checkboxes are checked. Other settings shown include 'STYLE TEMPLATE' (No style template selected), 'MOBILE TEMPLATE' (Water), and various other options like 'SHOW SURVEY TITLE', 'RANDOMIZE ITEMS IN PAGES', and 'DISPLAY JAVASCRIPT ALERT' which are unchecked. To the right, there is a mobile device preview showing a survey page with a progress bar and page numbers.

The primary feature I use on the **Permissions** tab is **ALLOW RETURN TO PREVIOUS PAGE**. Depending on the type of survey I may make this feature active so there's a BACK button available for the respondent to use to go back and change any answers. The default of this setting is off so if you need to turn it on, here's where you can change it.

**Survey Dashboard** ▶ **Editing: Hairball Cat Boutique Survey**

## Hairball Cat Boutique Survey

- Basic Info
- Appearance
- Permissions**
- Languages & Texts

PRIVACY LEVEL ? Public

ALLOW RETURN TO PREVIOUS PAGE ?

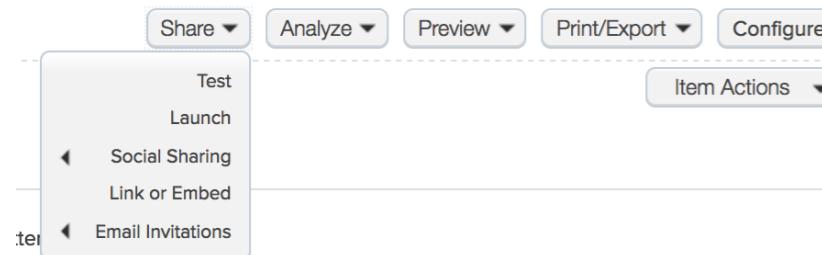
ALLOW RESPONSE RESET ?

ALLOW COMPLETED RESPONSE EDITS ?

ALLOW RESUME INCOMPLETE RESPONSES ?

[+ Show Advanced Settings](#)

The last item you need for your survey is the link! There's a couple of places to find your link. In the survey editor, you can select the **Share** drop down button and **Link or Embed**.



From this pop-up window there are two links you can copy; one with the survey name and one without.

**Link to/Embed your survey**

Use the link(s) below to share your survey online almost anywhere you want. Or copy the iframe code below and paste it into your website to embed your survey as an iframe.

**Links**

<https://elicitinsights.checkboxonline.com/Survey.aspx?s=03686f263f694e65a4a5373dd46d1668>

<https://elicitinsights.checkboxonline.com/Hairball-Cat-Boutique-Survey-.aspx>

**Embed code**

Embed with default URL  
 Embed with custom URL

```
<iframe width="800" height="600"
src="https://elicitinsights.checkboxonline.com/Survey.aspx?s=03686f263f694e65a4a5373dd46d1668">
```

[Close](#)

If you have an email provider who's distributing the survey for you, you can copy one of the first two survey links and send along.

If you are distributing the survey yourself, you can copy either of the links and hyperlink from your own email. In a future course I will walk through emailing through Checkbox.

Well, there ya go. That was my brief introduction into programming in Checkbox. You are on your ways to becoming a Checkbox programming rockstar! If you get stuck at any point, just send me a note!