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Simplified distribution workflow


Analysts can send distributions with fewer clicks. Other areas of the Conversational Surveys app are restricted.

Prerequisites:

Note: This workflow is only available by request. Please contact your Customer Success Manager for details.

You must have the Analyst role to complete this workflow.

Use the simplified distribution workflow for Analyst users, such as call center agents, who need to send conversational surveys quickly without needing to edit them. In this workflow, Analysts can only access the **Distribute** tab to preview and distribute pre-existing surveys. The **Build** and **Report** tabs are hidden. When creating a new distribution, Analysts can only manually enter recipients and send distributions now.

- From the **Alida Apps** page, open the Conversational Surveys app.
Result: The **Conversations** list opens.
- Find the conversational survey you want to distribute from the **Conversations** list.
- Create a new distribution by doing one of the following:
 - In the options menu beside a survey, click **Distribute**.

 - Click the survey name to open the **Distribution** page, then click **New Distribution**.
- Optional:** In the **Name** field, enter the recipient's name.
The recipient's name is shown in the **Distribution Name** column on the **Distribution** page. If no name is provided, the phone number is used instead.
- In the **Phone Number** field, type a phone number for the recipient.

Note: The system checks whether the phone number is a valid 10-digit number. However, it is up to you to ensure the phone number is correct.

- Optional:** To add a recipient, click **Add New Recipient**.
- To send the distribution, click **Create Distribution**.
- In the **Send Distribution** modal, click **Confirm**.
Result: The distribution is sent now.
- Optional:** On the **Distribution** page, click **Preview** to preview the conversational survey.



Related information

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