Surveys

Surveys are an integral feature in retail business, service scenarios, and lead nurturing phases.

You can design surveys that sales representatives will use to capture business related data. The information captured in the surveys offers you an insightful direction for your next set of business actions. The survey offering includes comprehensive survey design, execution and reporting capabilities.

Surveys can be consumed only if they are assigned to a business object such as visit, service ticket, lead, opportunity and so on.

General surveys, also known as checklist surveys are supported. This survey type contains a collection of questions in a list format.

Survey Question Types

Use **Question Types** to specify the format of the answer options.

The question types offered are as follows:

- **Numeric**: Capture numeric responses pertaining to:

  - **Amount**: Collect information in the currency that you specify. Validations are performed against the lower or upper limits that you have set.

  - **Quantity**: Collect information in the unit of measure that you specify.

  - **Numeric Value**: Collect numeric responses that do not specify **Unit of Measurement** or **Currency** as a mandatory field.

For information on deriving calculations, see [Derive Calculations for Numeric Questions](#).

- **Date**: Choose required dates from the calendar as **Date** and **Date Range**.

- **Matrix**: Gather more details at once using a matrix of rows and columns.

- **Multiple Choice**: Choose one or more predefined responses from:

  - **Multiple Choice Single Select**: Select one option from predefined response options using radio buttons, toggle buttons or dropdown list.

  - **Multiple Choice Multiple Select**: Respondents can select multiple options from predefined options using checkboxes or dropdown lists.

- **Text**: Enter any additional information you want to give your survey respondents.

- **Signature**: Ask for signature upon completion of a survey.

Structure your content using **Sections** and **Page Breaks**.

Survey Status

Once you start creating a survey, you'll need to pay attention to its status. The different statuses for surveys are as follows:

- **In Preparation** (initial status): In this status you can add, change or delete questions and answers. Surveys with status **In Preparation** cannot be assigned to an activity plan, visit, playbook, lead, or opportunity.

From **In Preparation** you can switch to **Active**.

- **Active**: Indicates that the survey is ready to be used. You can use the survey for plan, visit, playbook, lead, or opportunity.

From **Active** you can switch to **In Preparation** and **Obsolete**.

- **Obsolete**: The survey can no longer be assigned to an activity plan, visit, playbook, lead, or opportunity. If the survey is already used for open, or in process store visits, the survey can still be completed during the visit.

- **Inactive**: The survey can no longer be edited or reused on changing the status. You cannot change the status from **Inactive** to **Obsolete**: If a new version of a survey is created and activated, the previous one becomes inactive.