

Your Guide to KIS Surveys

Keep it simple



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Keep it simple:

- **Email survey** – this allows you to email the survey to your clients/staff
- **Open Invite survey** – clients or staff access the survey at their own convenience
- **Txt Email survey** – this allows you to both text and email the survey to your clients/staff, however the survey is limited to five questions and answers are limited to four options
- **Trigger alerts** – enabling ‘trigger alerts’ will allow you to be alerted by email when one or more of the survey statistics reaches a percentage; this percentage will be tailored to your preference

1. Creating a KIS Survey

Click on the **Survey Dashboard** icon.



Click on the **Manage Survey Questions** icon.



Then select which type of survey you would like to create, (**Open Invite**, **Txt Email** or **Email**).



Under **Make New Survey**, enter a survey name and custom ID number (the custom ID is optional and for your records only).

Click on **Make New Survey Now**.

Edit or Delete survey: Select Survey...

Make New Survey

Enter New Survey Name:

Custom ID number:

Make New Survey Now

You can now enter your questions and there is no minimum or maximum requirement on email and open invite; you can have as many, or as little as you want. However there is a limit of 5 questions and 4 answers on txt email surveys.

Question 1:

✖

✖

✖

✖

✖

✖

✖

- To delete a field click the delete icon (x) at the end of the field you wish to delete.
- To add a field click the add icon (+) under the last field.
- To add a new question click on the **Add New Question** icon at the bottom of the screen.
- When you have finished creating your KIS Survey, click **Save And Update**.

PLEASE NOTE: Your KIS Survey will not be saved unless you do this.

If you would like to see a print preview of your KIS Survey, click on the printer icon at the top of your screen.



You can return to the homepage at any time, simply click on the homepage icon found at the bottom of your screen or click on your logo at the top of your screen.



2. Editing or deleting an existing KIS Survey

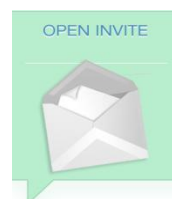
Click on the **Survey Dashboard** icon.



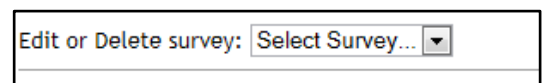
Click on the **Manage Survey Questions** icon.



Then select which type of survey you would like to edit, (**Open Invite**, **Txt Email** or **Email**).



Click on **Edit or Delete Survey** dropdown box and select the KIS Survey you wish to edit or delete.



Click on the **Edit** icon to set campaign options. This edits the body and footer of the email that will be sent to clients.



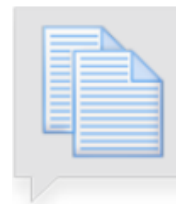
It also edits the email subject, sender name (the sender name is **ONLY** on txt email as this is the name which will appear on the texts. You can either enter a phone number OR 11 alpha characters, for example: 01722439832 OR KISSurveys) the re-direct URL for your company website and choice of font and font size.

Set Campaign Options



Email Subject: *	<input type="text" value="Feedback"/>	<small>This is the subject of the email the users receive inviting them to take a survey.</small>
Sender Name *:	<input type="text" value="KISSurveys"/>	<small>This can be a phone number or a maximum of 11 alpha characters.</small>
Redirect URL: *	<input type="text" value="http://www.kis-surveys.co.uk"/>	<small>This is the url that the user gets re-directed to after completing a survey or after unsubscribing.</small>
Email Font Family: *	<input type="text" value="Arial"/>	
Email Font Size: *	<input type="text" value="8pt"/>	

Click on the **Duplicate** icon to set campaign options for a duplicate campaign. A duplicate campaign will have an exact copy of the campaign options, questions, answers and trigger settings.



When editing your KIS Survey don't forget to click the **Save And Update** icon at the bottom right of your screen; your changes won't be saved otherwise.



To delete a KIS Survey simply select the survey that you wish to delete from the drop down list and click the delete icon (x).



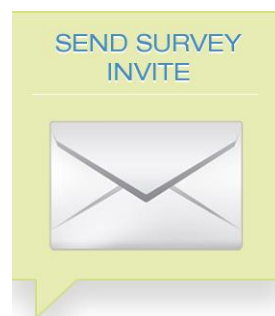
Please note that when you delete a survey, or delete a survey question you will permanently lose the survey data and all associated information. If you wish to keep the information you will need to download and save the information onto your computer. You can do this from the View and Download button found on the homepage.

3. Send a KIS Survey

Click on the **Survey Dashboard** icon.

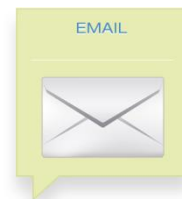
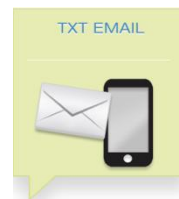


Click on the **Send Survey Invite** icon. You now have the option to send your KIS Survey invitation to an individual or several individuals, depending on your requirements.



Choose what type of survey you wish to send.

N.B. When sending a **Txt Email** enter the client mobile number for the survey to be received as a text.



Sending a KIS Survey to an individual:

- Complete the required fields. If you are sending the invitation to a married couple you have the added option of choosing “Mr and Mrs”. Remember to select the correct KIS Survey by clicking **Select Survey** in the drop down menu.
- Once you have sent your KIS Survey invitation the recipient will receive an email with a direct link for them to access your KIS Survey.
- A confirmation email will be sent to you on completion of the KIS Survey.

Title:	<input type="text" value="Dr"/>
First Name:	<input type="text"/>
Surname:	<input type="text"/>
Client Email:	<input type="text"/>
Client ID: <small>(optional)</small>	<input type="text"/>
Select Survey:	<input type="text" value="Select Survey..."/>
<input type="button" value="Send Email"/>	
<input type="button" value="Bulk Email"/>	

Sending a KIS Survey to several individuals:

- Click **Bulk Email**.
- Click **Select Survey**.
- Click **Select File Type**.
- Click **Filename** to browse your files and folders for your chosen database.

Select Survey: Select File Type:

Upload your Outlook CSV file, you will be given the option to preview and edit your data before any emails are sent.

Filename:

- Once uploaded this data will appear in the following pop-up box.

Title	First Name	Surname	Email	Client ID
Ms <input type="text" value="v"/>	S	Davis	S.Davis@	<input type="checkbox"/>
Mrs <input type="text" value="v"/>	J	Smith	J.smith34@	<input type="checkbox"/>
Mr <input type="text" value="v"/>	T	Bird	Tbird@	<input type="checkbox"/>

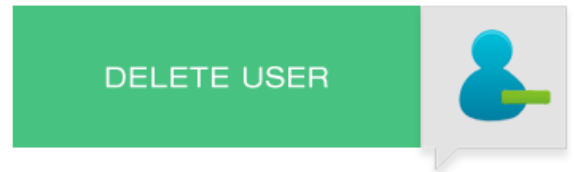
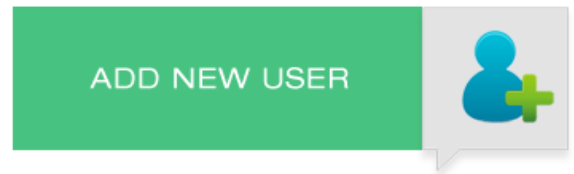
- Click **Send Email**, and your KIS Survey invitation will be sent to each of your selected recipients.

If you would like to use the **Bulk Email** option, your contacts will need to be saved in a .csv file. You can either use outlook or excel.

If you're not sure how to create a .csv file, please see pages 13 – 15 of this guide for step-by-step instructions.

4. Adding and deleting users

Click the **Add New User** icon or **Delete User** icon on the homepage.



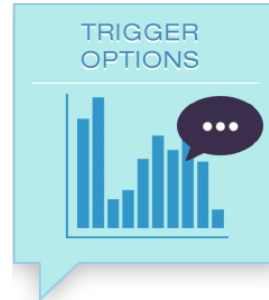
There are four different levels of user that can be added:

- **Super Admin** – has access to all of the settings.
- **Admin Manager** – has access to everything except setting and viewing the trigger option settings.
- **Admin Assistant** – has the same access as Admin Manager except cannot add users.
- **Basic User** – can only view and download surveys assigned to that user.

5. Trigger Options

Enabling 'Trigger alerts' will allow you to be alerted by email when one or more of the survey statistics reaches a percentage; this percentage will be tailored to your preference.

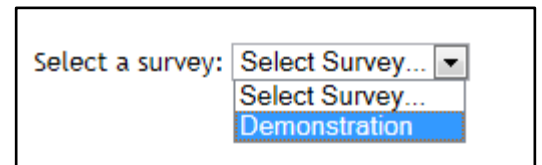
Click on the **Trigger Options** icon.



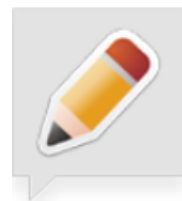
Then select which type of survey you would like to Edit the **Trigger Options** for, (**Open Invite**, **Txt Email** or **Email**).



Select the survey you would like to edit the **Trigger Options** for.



Click on the **Edit** icon to set campaign options. This allows you to enter the email address that receives trigger alerts for your campaign.



Set Campaign Options

Enter Email * Enter the email address that you wish to receive trigger alerts for this campaign.

To set a trigger alert, simply click the 'Trigger Option' box and enter the percentage at which you wish to be alerted.

Question 1:

How well do you gather feedback at the moment?

Expertly

Trigger Option: 51.0 %

Satisfactory

Trigger Option: 00.0 %

Poorly

Trigger Option: 00.0 %

Need help!

Trigger Option: 51.0 %

6. Viewing and downloading KIS Surveys results

Click on the **Survey Dashboard** icon.



Click on the **View And Download** icon.
You can view the results from all completed surveys, and, should you wish, download the results to an Excel spreadsheet.



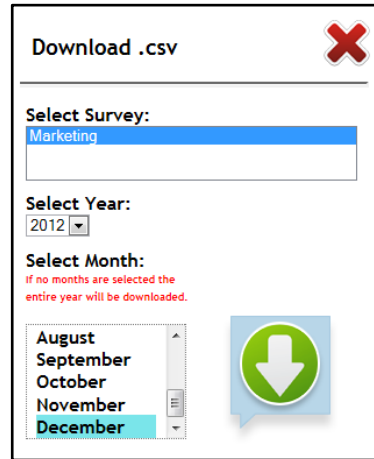
To view the results of different surveys, click on the dropdown box **Select A Survey**.



To download your data click on the download icon (arrow, as above).

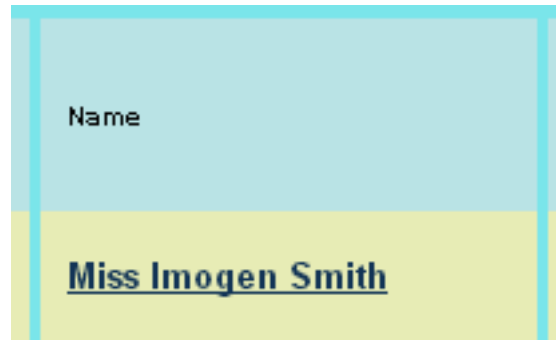
A dialogue box will open; this is where you choose what data you would like to download.

You can filter your KIS Surveys by month and year.



Another pop up box will open. You will get a choice to either open the document, or save the document directly to your chosen location.

To view results from individual clients, click on the clients name in the survey results table.



This will display the results in a new window.

User details:	
Name Miss Imogen Smith	E-mail : imogen@kis-surveys.co.uk
Started : 2013/06/11 09:04:33	Ended : 2013/06/11 09:04:42
Time Taken : 00 Minute(s), 09 seconds	IP Address : 81.149.227.46
Phone :	
1. How is the weather?	
Sunny	
Comments	
Lovely	

7. Creating a .csv file

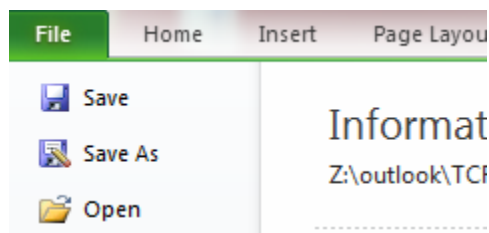
- **How to convert an existing Excel file to a .csv format:**

- a) Your Excel spreadsheet needs to be in the following format before uploading your contacts to the **Bulk Email**. We will provide a template for you if you wish.

	A	B	C	D
1	Title	First Name	Surname	Email Address
2				
3				
4				

- b) Open your Excel file.

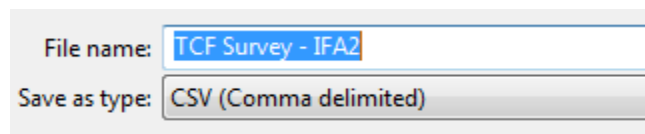
- c) On the File menu, click on **File** and **Save As**.



- d) Select the location in which you would like to save the file.

- e) In **File name**, name your document.

- f) In **Save As type**, select **CSV (Comma Delimited)** from the pull down menu.

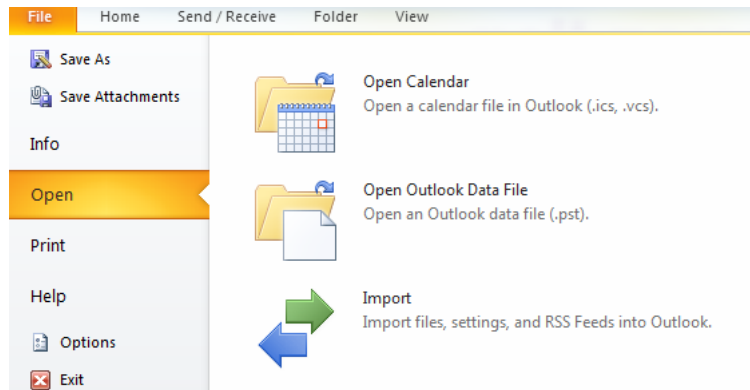


- g) Click **Save**.

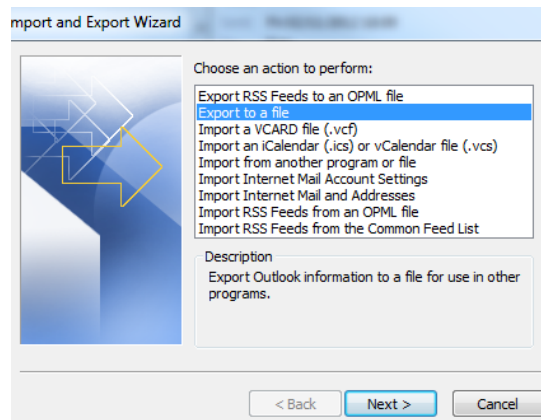
- h) You may receive one or two warnings about the formatting of .csv, just click yes.

- **How to convert your Outlook contacts to a .csv format:**

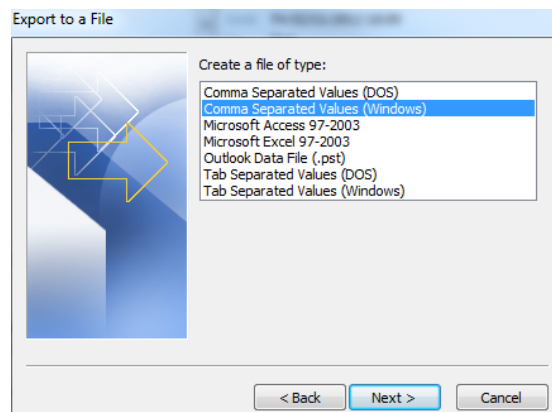
- Open Outlook, from the file menu click on the **Open** tab on the left-hand side then choose **Import**.



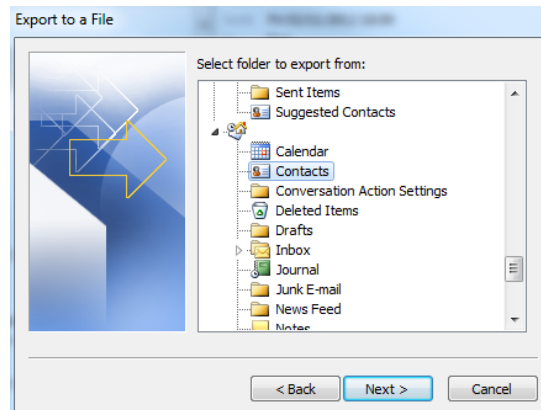
- Select **Export to a file**, click **Next**.



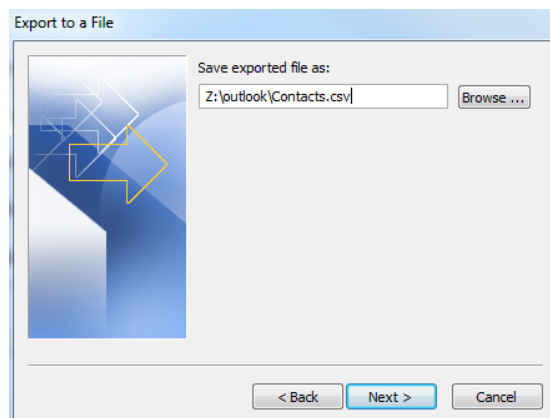
- Select **Comma Separated Values (Windows)**, click **Next**.



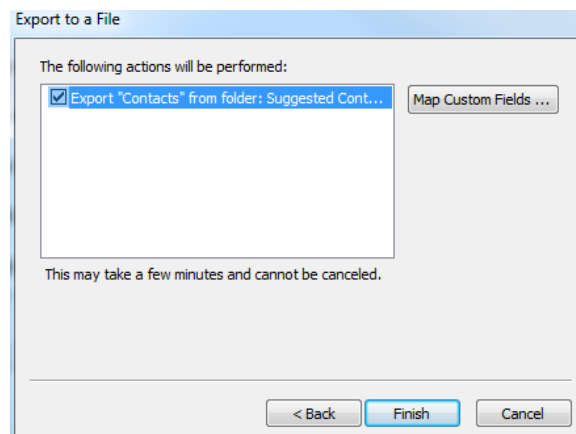
- d) Select the folder your **Contacts** are stored in and click **Next**.



- e) Save your contacts in your desired location. Always make sure the file path is saved as **.csv** as per the example below.



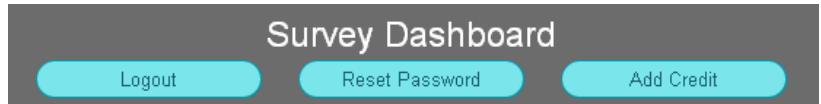
- f) Click **Finish** and allow the process to complete.




8. Adding credit to your textanywhere account

To be able to send survey texts, the sales support, with your permission, will set up a textanywhere account for you.

To add credit to your account, you simply click 'add credit' on your site which is on your home page. This will take you straight to the page with the pricing for the text bundles.





Buy Credits ?

Please select the amount of messages you wish to purchase. Messages purchased are immediately applied to your account, upon successful completion of the credit or debit card transaction.

	Pack Size	Message Cost, ex VAT	Pack Cost, ex VAT	Pack Cost, inc VAT
<input type="radio"/>	250	£0.0750	£18.75	£22.50
<input type="radio"/>	500	£0.0690	£34.50	£41.40
<input type="radio"/>	1000	£0.0640	£64.00	£76.80
<input type="radio"/>	5000	£0.0570	£285.00	£342.00
<input type="radio"/>	10000	£0.0490	£490.00	£588.00

Please select Payment Provider:

Use credit or debit card

Our contact details:

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