Launching a Survey

Surveys are launched using campaigns.

Launching a Person Campaign

Surveys can be directly targeted to a group of people.

Additionally, a Person Campaign survey can also set against a target object if required. When the respondent opens the survey, they will select from a list of records that they will need to choose from in order to complete the survey.

To create a Person Campaign:

1. Open the survey you want to send.
2. Select **Campaigns** tab.
3. Select +**NEW**. The menu appears.
4. Select **Person Campaign**. The Person Campaign form appears.
5. Type the name for the Person Campaign in the **Name** field.
6. Type the description for the Person Campaign in the **Description** field.
7. Type the date you want in the **Closes On** field or select the Date icon and select the date. A due date is set on the survey task that is created when the survey is launched.
8. If required, in the **Target Object** field, select the Pencil icon. The Select Object dialogue appears.
9. Select the object you want and select **OK**. The survey is set against the records of the object.
10. In the **Recipients** tab, select **+** . The Select Person dialogue appears.
11. Select the checkbox for the people you want to target for the survey and select **OK**.
12. Select **Launch Campaign** button in the top right corner of the form. This creates survey tasks for each recipient.

Launching a Target Campaign

Surveys can be generated from one or many records. First, a target object is selected following the nominated record(s). The person who receives the survey will be based on the selected relationship, where the relationship based on a 'Person', such as an 'Owner'. When the respondent opens the survey, they see the target record which they need to

complete the survey against.

1. Open the survey you want to send.
2. Select **Campaigns** tab.
3. Select +**NEW**. The menu appears.
4. Select **Target Campaign**. The Target Campaign form appears.
5. Type the name for the Target Campaign in the **Name** field.
6. Type the description for the Target Campaign in the **Description** field.
7. Type the date you want in the **Closes On** field or select the Date icon and select the date. A due date is set on the survey task that is created when the survey is launched.
8. In the **Target Object** field, select the Pencil icon. The Select Object dialogue appears.
9. Select the object you want and select **OK**.
10. In the **Survey Taker** field select the down arrow. The drop down list appears.
11. Select the one you want in the drop down list.
12. In the **Targets** tab, select **+**. The Select dialogue appears.
13. Select the checkbox for the people you want to target for the survey and select **OK**.
14. Select **Launch Campaign** button in the top right corner of the form. This creates survey tasks for each recipient.

> Survey Tasks are created for each record assigned to the nominated people identified in the **Target Object**