
LEADPRO 24|7

Online Survey Builder Software

Survey Design and Creation
Quick Reference Document

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www.LeadPro247.Com

Note: The cloud based on-demand survey system is frequently updated to incorporate new features and enhance existing functions. Hence this document may not reflect the current system features and functions. Please check our blog resources or contact the support team for details.

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LeadPro 24|7 Online Survey System

LeadPro 24|7 Survey Builder is a cloud based survey software system suitable for students, research institutions, businesses of all sizes and non-profit organizations. Surveys can be designed, created and deployed in minutes and the response data can be viewed online in real time. The Survey Builder tool is available in Free, Professional and Enterprise editions with comprehensive features to suit various user requirements.

Survey Creation

There are a number of flexible question types available with the LeadPro 24|7 survey software, which may be used to create an effective survey questionnaire. Every question type is designed to extract a particular type of information needed to enhance and validate the survey result. Therefore the questions need to be designed with the end goal in mind. Please refer the LeadPro 24|7 Survey Question Types documentation to view more details on the survey types supported by the system.

Creating a survey in the Survey Builder software is a simple, step by step process. The process starts with the clicking on the **Surveys** → **Survey Definition** option in the menu panel.

Survey Definition and Maintenance

The system displays the existing surveys (defined already) on the page along with the survey status and link icons for performing various maintenance / update operations.

The screenshot shows the 'Survey Definition' page. At the top right, there are links for 'Logout | FAQ | Help'. Below this is a search and filter section with input fields for 'Survey Name', 'Survey Title', 'Survey Category', and 'Owner'. There are also dropdown menus for 'Status' (set to '--All--') and 'Creation Date' (set to '--All--'). Action buttons include 'Search', 'Reset', and a prominent green 'Define a New Survey' button. A 'Records/Page' dropdown is set to '25'. Below the search section is a table with the following data:

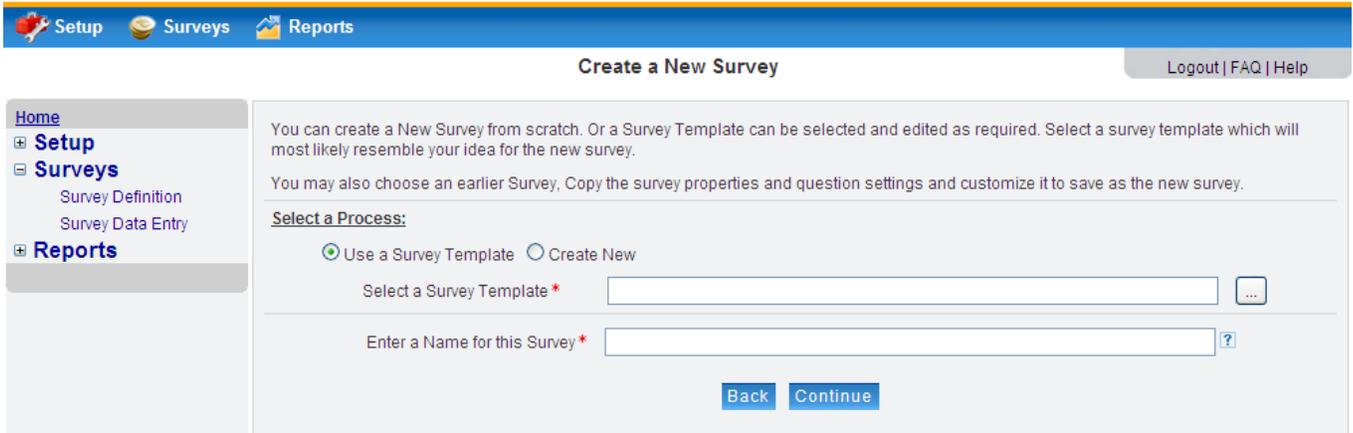
Survey ID	Survey Name	Created On	Status	View	Theme	Properties	Questions	Pages	Collectors	Preview
100080	Public School Survey Public School Survey (Non-Profit)	04/22/2009	Inactive	Activate						
100070	Event Feedback Survey Event Feedback Survey (Market Research)	04/22/2009	Active	Stop						
100040	Educational Survey Educational Survey (Market Research)	03/26/2009	Active	Stop						

At the bottom of the table, there is a legend for 'Survey Status Indicators': a green circle for 'Active', a red circle for 'Inactive', and an orange circle for 'Draft'.

The search parameters provided at the top of the screen helps to filter the list if there are a number of surveys in the system. The **Define New Survey** button in the center of the screen is used to start a new survey definition.

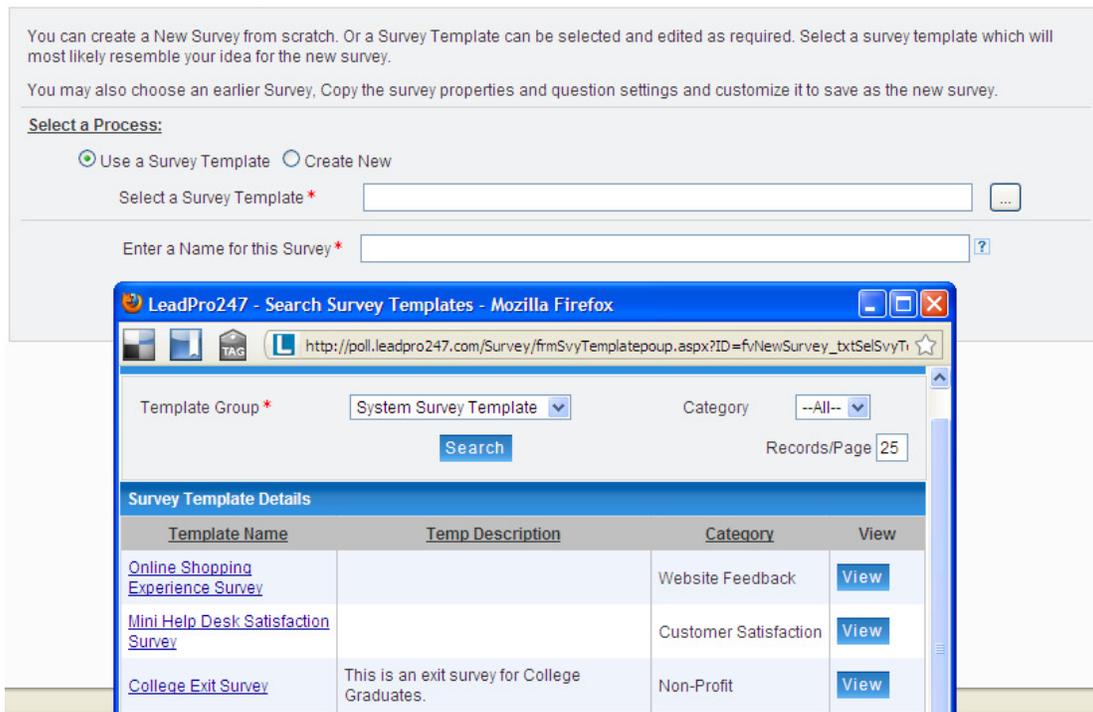
Creating A New Survey

Clicking on the **New Survey** button opens up a new screen. The first task is to enter a name for the new survey; this will be used for internal purposes only and will not be visible to the survey respondents. A new survey can be created either from the ground up or from the copy of a survey template in the system. Hence the system needs to be told if you would like to create an entirely new survey or start from a template.



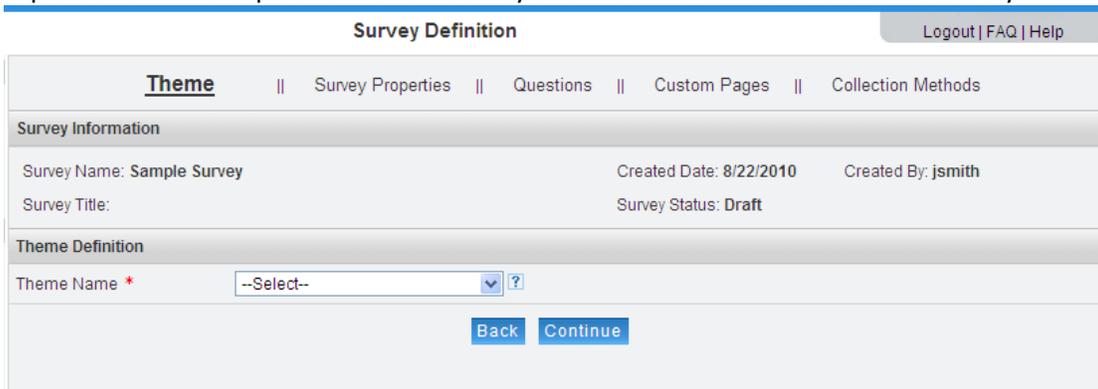
Choosing a Survey Template

If the new survey is to be created from a template, then a survey template is to be chosen from the list stored in the system. A small popup window helps to search and select a survey template from the list. The templates could be of two types: (1) **System Templates** which comes with the survey system, and (2) **Custom Templates** which are created and stored by the account users.



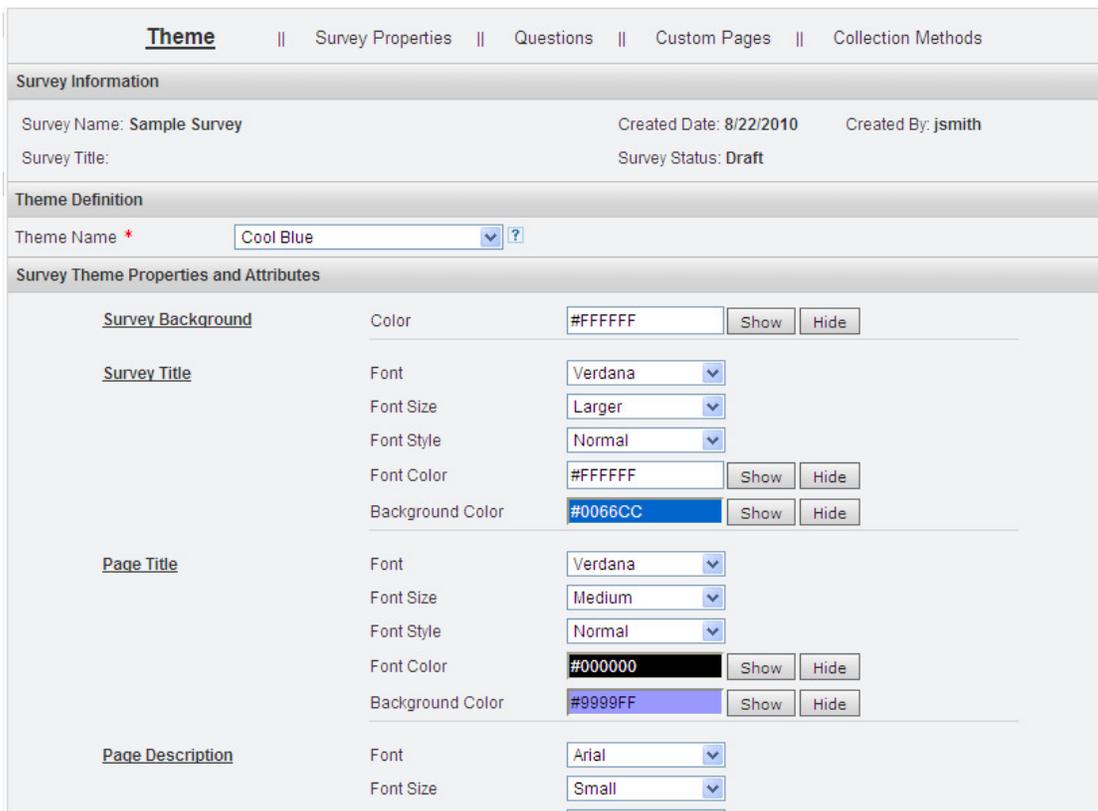
Selecting a Theme

If you have selected a survey template as the starting point, the entire survey properties including the survey theme and questions will be copied to the new survey and the same can be edited as necessary.



The screenshot shows the 'Survey Definition' page with a navigation bar containing 'Theme', 'Survey Properties', 'Questions', 'Custom Pages', and 'Collection Methods'. The 'Theme' tab is active. Below the navigation bar is the 'Survey Information' section with fields for 'Survey Name: Sample Survey', 'Created Date: 8/22/2010', 'Created By: jsmith', 'Survey Title:', and 'Survey Status: Draft'. The 'Theme Definition' section features a 'Theme Name *' dropdown menu currently set to '--Select--'. At the bottom of the page are 'Back' and 'Continue' buttons.

If you are starting a survey from the ground up, a **Look and Feel Theme** can be selected from the system. Once a theme is selected from the theme dropdown, the theme properties will be displayed on the page. The fonts, colors and styles can be changed for each of the properties. A color picker is provided to select the required color.



The screenshot shows the 'Survey Theme Properties and Attributes' page. The 'Theme Name *' dropdown is now set to 'Cool Blue'. The page is divided into three sections: 'Survey Background', 'Survey Title', and 'Page Title'. Each section has a list of properties with corresponding dropdown menus and color pickers. The 'Survey Background' section includes 'Color' (set to #FFFFFF) with 'Show' and 'Hide' buttons. The 'Survey Title' section includes 'Font' (Verdana), 'Font Size' (Larger), 'Font Style' (Normal), 'Font Color' (#FFFFFF), and 'Background Color' (#0066CC). The 'Page Title' section includes 'Font' (Verdana), 'Font Size' (Medium), 'Font Style' (Normal), 'Font Color' (#000000), and 'Background Color' (#9999FF). The 'Page Description' section includes 'Font' (Arial) and 'Font Size' (Small).

At the bottom of the Theme Parameters page, a **Theme Preview** option is included. The preview can be used to view the usage of various theme properties in a survey.

Once the theme properties are reviewed and finalized, clicking the **Continue** button at the bottom of the page saves the theme selection and proceeds to the next step - defining Survey Properties.

Theme Preview

Market Research Survey (Survey Title) Exit This Survey

This is the Page Title. The page title is optional and may be left blank.

This is the Page Description text for this page of the survey. You may include a few lines of text at the top of each page in the survey. Note that this is an optional text area and may be skipped, if not required.

60%

1. Tell us about your Preferences. (Question 1) *

This is the Description for Question 1. You may provide a short description / help / hint for each question in the survey, which will help the respondent to interpret the question correctly.

	Choice One	Choice Two	Choice Three
Row One	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Row Two	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Row Three	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

[Back](#) [Continue](#) [Hide Theme Preview](#)

Survey Properties Definition

A host of properties are defined in this step. The system displays the set of properties which can be selected with simple check marks or clicks. The entire set of properties can be defined in one page without hoping to multiple steps.

Depending on the selection of individual properties, the system may prompt for additional parameters. The screenshot shows the properties, which are self explanatory.

Theme || **Survey Properties** || Questions || Custom Pages || Collection Methods

Survey Properties

In this section, you will be configuring the Survey Properties such as Titles, Page and Question Number displays, etc.

1. Survey Name:

2. Enter Survey Title

Note: This will not be visible to survey respondents. This title is for your internal use only.

Display Survey Title in the Survey pages

Display Page Titles in the Survey pages

3. Survey Category

4. Enter Survey Description

Available Characters 512 (Max 512)

5. Add Logo to the Survey

Logo File

6. Add Progress Bar to the Survey

7. Question and Page Numbering

Display Page Numbers

At the end of the page, the **Continue** button helps to save the properties and proceed to the next step – entering / updating the Survey Questions.

Entering Survey Questions

As mentioned above, if the survey template is used the questions will be pre-populated in the new survey. If not, an empty page will be displayed. Clicking on the **Insert Question** button starts the question entry process.

Survey Definition Logout | FAQ | Help

Theme || Survey Properties || **Questions** || Custom Pages || Collection Methods

Survey Information

Survey Name: Sample Survey	Created Date: 08/22/2010	Created By: jsmith
Survey Title: Fulfillment Experience Survey	Survey Status: Draft	

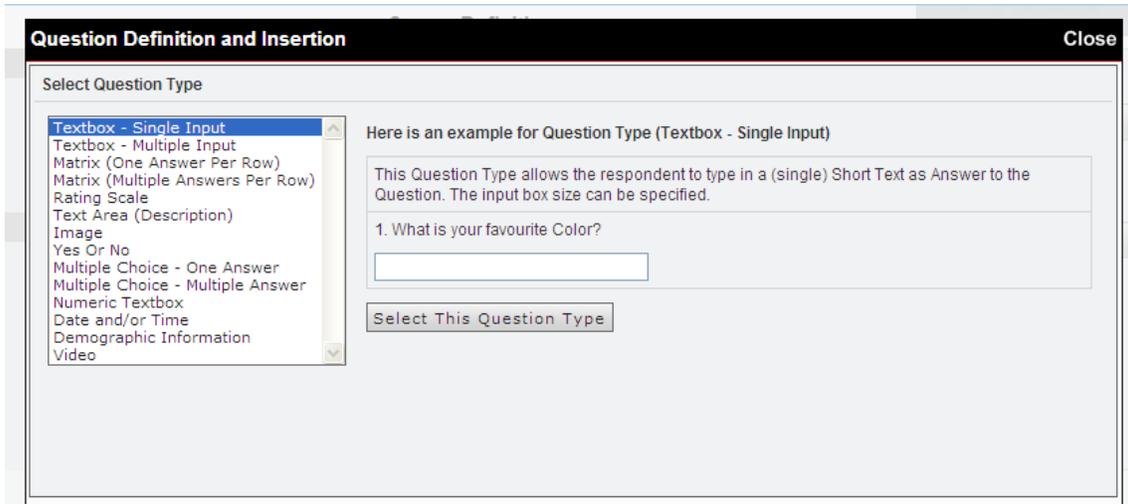
Sample Survey

[View All Pages](#) or select a Page to view

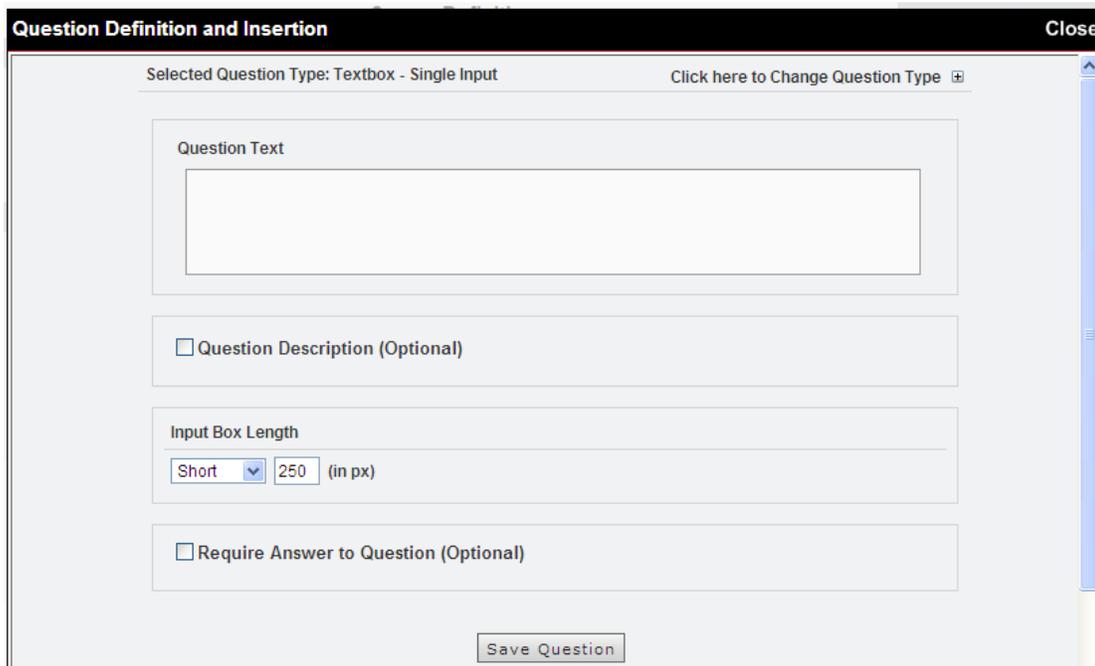
Default Section [Edit Page](#)

Survey Question Types

A popup window will display the survey question types as shown in the picture. A sample question will be displayed to the right of the question list. Clicking on a question changes the example display accordingly.



The **Select This Question Type** button expands the window and displays the information to be entered. Finally, clicking on the **Save Question** button selects the respective question and inserts into the questionnaire. For more information on the survey question types supported by the Survey Builder system, please refer to the Survey Question Types documentation.



Multiple Pages and Questions

Multiple questions can be entered into the survey by clicking on the **Insert Question** link in the required position and repeating the above process. The survey questionnaire can be split into multiple pages by using **Insert Page** option displayed next to each question.

The **Edit** icon displayed on the top right corner of the question can be used to edit the respective question properties. The **Delete** icon can be used to delete the respective question.

Custom Pages Definition

With the online Survey Builder software, pages such as Greeting / Introduction page, Survey Closed page, Thank You page, and Quota Over page can be completely customized. A built-in HTML editor helps to customize these pages.

Survey Definition Logout | FAQ | Help

Theme || Survey Properties || Questions || **Custom Pages** || Collection Methods

Survey Information
Survey Name: **Public School Survey** Created Date: 4/22/2009 Created By: admin
Survey Title: **Public School Survey** Survey Status: Deactivated

Custom Pages

Include Opening/Intro/Greeting Page for the Survey?	<input checked="" type="radio"/> Yes <input type="radio"/> No	Include Survey Closed Message page?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Include Header (for all pages on the survey)?	<input checked="" type="radio"/> Yes <input type="radio"/> No	Include Footer (for all pages on the survey)?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Include Survey Over Quota page?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Include Survey Screen Out page?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Include Thank You/Survey Completion page?	<input checked="" type="radio"/> Yes <input type="radio"/> No		

Click on the following links View/Customize the respective page.

Page	View	Customize	Reset to Default
Opening/Intro/Greeting Page			<input type="radio"/>
Thank You/Survey Completion Page			<input type="radio"/>
Header Page			<input type="radio"/>
Footer - Password Page			<input type="radio"/>

Required pages can be selected and the customized. Finally the page can be saved before continuing to the data **Collector Definition** step.

Editing An Existing Survey

The existing surveys can be edited (subjected to certain conditions) depending on the status of the survey. In the **Surveys** → **Survey Definition** option, list of existing surveys can be viewed. Link icons for editing **Theme**, **Survey Properties**, **Questions**, **Custom pages** and **Collectors** are provided against each survey. By clicking on a suitable icon link, the respective survey's components can be edited and saved. Additional questions can also be added to the survey questionnaire.

Search / Filter Surveys

Survey Name [?](#) Survey Title

Survey Category Owner

Status Creation Date

[Search](#) [Reset](#) [Define a New Survey](#) Records/Page

Use the links below to Update / View the Survey Components

Survey ID	Survey Name	Created On	Status	View	Theme	Properties	Questions	Pages	Collectors	Preview
100080	Public School Survey Public School Survey (Non-Profit)	04/22/2009	 Activate							

Survey Deployment

Once the survey properties and questions are defined and saved, the survey can be deployed using one or more collectors. The system supports Web URL Link collector, Email Invitation Link collector, Website Popup collector and Manual Data Entry collector. For more information on the survey data collection and deployment, please the respective reference document.

Survey Analysis

The survey responses can be monitored, analyzed and viewed in real time. The system comes with several analysis reports. For more information on the same, please refer to the Survey Analysis documentation.

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