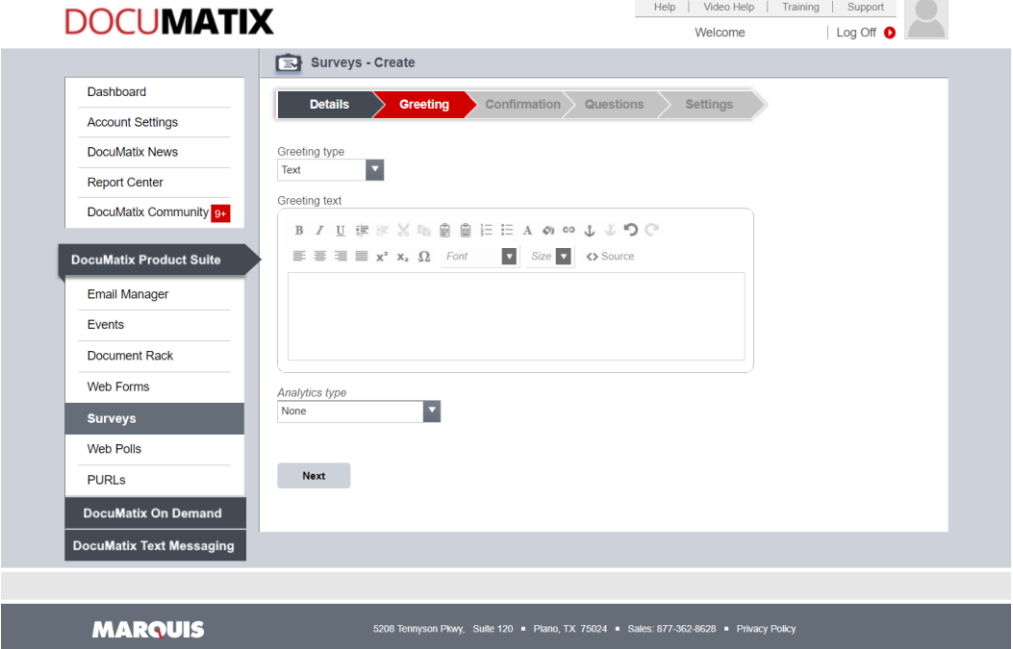


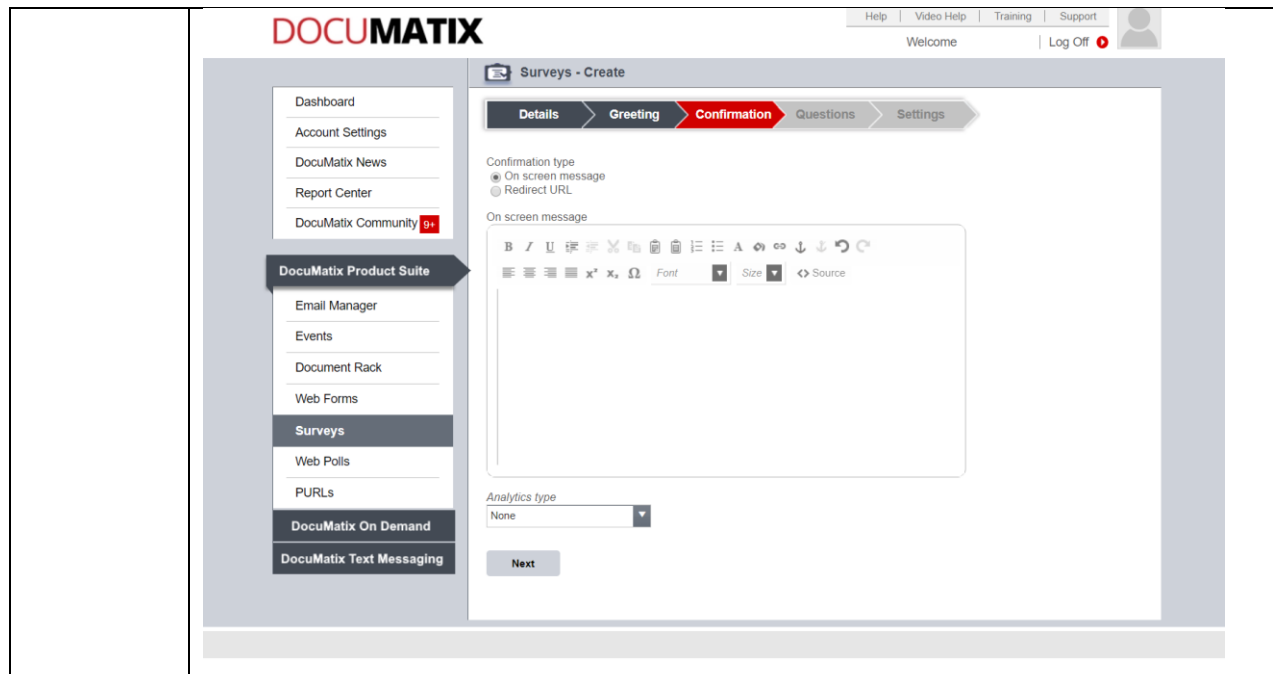
MARQUIS


















DMX338	Add a Survey
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Click on “ Survey ” located in the menu on the hand left side of the page
Step 3	Click the green “ Add New ” button
Step 4	Complete the “ Details ” page
Note: Anything in <i>italics</i> is an optional field as noted below. Some of the fields will auto populate from Account Settings.	
	<ul style="list-style-type: none"> Survey name
	<ul style="list-style-type: none"> Description (optional)
	<ul style="list-style-type: none"> Response notification email (optional)
	<ul style="list-style-type: none"> Place in folder
	<ul style="list-style-type: none"> “When survey is tracked from an email...”
	<ul style="list-style-type: none"> Never expire survey
4.1	If the “ Never expire survey ” option is not enabled, the following options will display:
	<ul style="list-style-type: none"> Expire notification email address
	<ul style="list-style-type: none"> Expire on date
	<ul style="list-style-type: none"> Expire by response
	<ul style="list-style-type: none"> Expire type <ul style="list-style-type: none"> Expire message Expire redirected URL
	<ul style="list-style-type: none"> Expire message
Step 5	Click “ Next ”
Step 6	Complete the “ Greeting ” page

MARQUIS

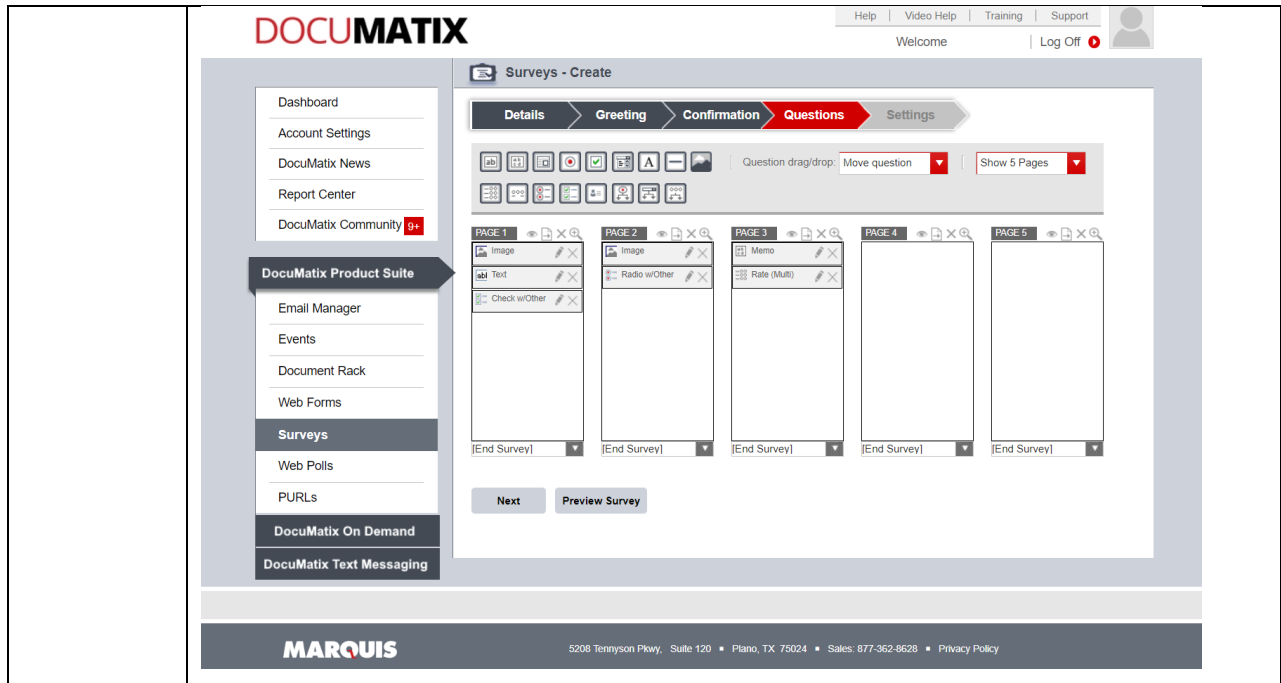
	<ul style="list-style-type: none"> • Greeting type <ul style="list-style-type: none"> ○ Text ○ Graphic ○ Combination (text/graphic) ○ Combination (graphic/text) ○ None • Greeting text • Analytics type (optional) <ul style="list-style-type: none"> ○ None ○ Google Analytics ○ Custom Java script ○ Custom HTML
	
Step 7	Click "Next"
Step 8	Complete the "Confirmation" page
	<ul style="list-style-type: none"> • Confirmation type <ul style="list-style-type: none"> ○ On screen message ○ Redirect URL • Analytics type (optional)

MARQUIS



Step 9	Click “Next”
Step 10	Complete the “Questions” page
	Select an icon that corresponds to the function desired by “Click, Drag, and Drop” the icon into the desired page for the survey being created
	<ul style="list-style-type: none"> •  Text
	<ul style="list-style-type: none"> •  Memo
	<ul style="list-style-type: none"> •  Date
	<ul style="list-style-type: none"> •  Radio
	<ul style="list-style-type: none"> •  Checkbox
	<ul style="list-style-type: none"> •  Drop down
	<ul style="list-style-type: none"> •  Custom Text
	<ul style="list-style-type: none"> •  Line
	<ul style="list-style-type: none"> •  Image
	<ul style="list-style-type: none"> •  Rate (Multiple)
	<ul style="list-style-type: none"> •  Rate (Single)
	<ul style="list-style-type: none"> •  Radio button w/Other
	<ul style="list-style-type: none"> •  Checkbox w/Other
	<ul style="list-style-type: none"> •  Contact info
	<ul style="list-style-type: none"> •  Skip - Radio
	<ul style="list-style-type: none"> •  Skip - DD
	<ul style="list-style-type: none"> •  Skip - Rate (Single)

MARQUIS



Step 11	Click "Next"
Step 12	Complete the "Settings" page
	<ul style="list-style-type: none"> • Choose Logo
	<ul style="list-style-type: none"> • Show logo
	<ul style="list-style-type: none"> • Logo alignment
	<ul style="list-style-type: none"> • Submit button alignment
	<ul style="list-style-type: none"> • Render width
	<ul style="list-style-type: none"> • Next page button text
	<ul style="list-style-type: none"> • Previous page button text
	<ul style="list-style-type: none"> • Last page button text
	<ul style="list-style-type: none"> • Color selections
	<ul style="list-style-type: none"> • Add text (optional)
	<ul style="list-style-type: none"> • Footer (optional)
	<ul style="list-style-type: none"> • Show page progress on survey
	<ul style="list-style-type: none"> • Save my current settings as default values

MARQUIS

- Step 13** Click **“Finish”**
- Step 14** Click on the survey and click **“Publish”**
- Step 15** Click **“Yes”**
- Step 16** A **Survey Link** page will appear with all of the link information regarding the survey.

MARQUIS

	If desired, there is an option to create a Push Report for the survey. Move to the next step if that is something you would like to setup.
Step 17	Click " Create Push Report "
Step 18	Complete " Push Report " page
	<ul style="list-style-type: none">• Report type
	<ul style="list-style-type: none">• Surveys
	<ul style="list-style-type: none">• Push report name
	<ul style="list-style-type: none">• Email addresses
	<ul style="list-style-type: none">• Push report start date
	<ul style="list-style-type: none">• Push report expire date
	<ul style="list-style-type: none">• Frequency
	<ul style="list-style-type: none">• Days of the week
	<ul style="list-style-type: none">• Time of the day
Step 19	Click " Submit "