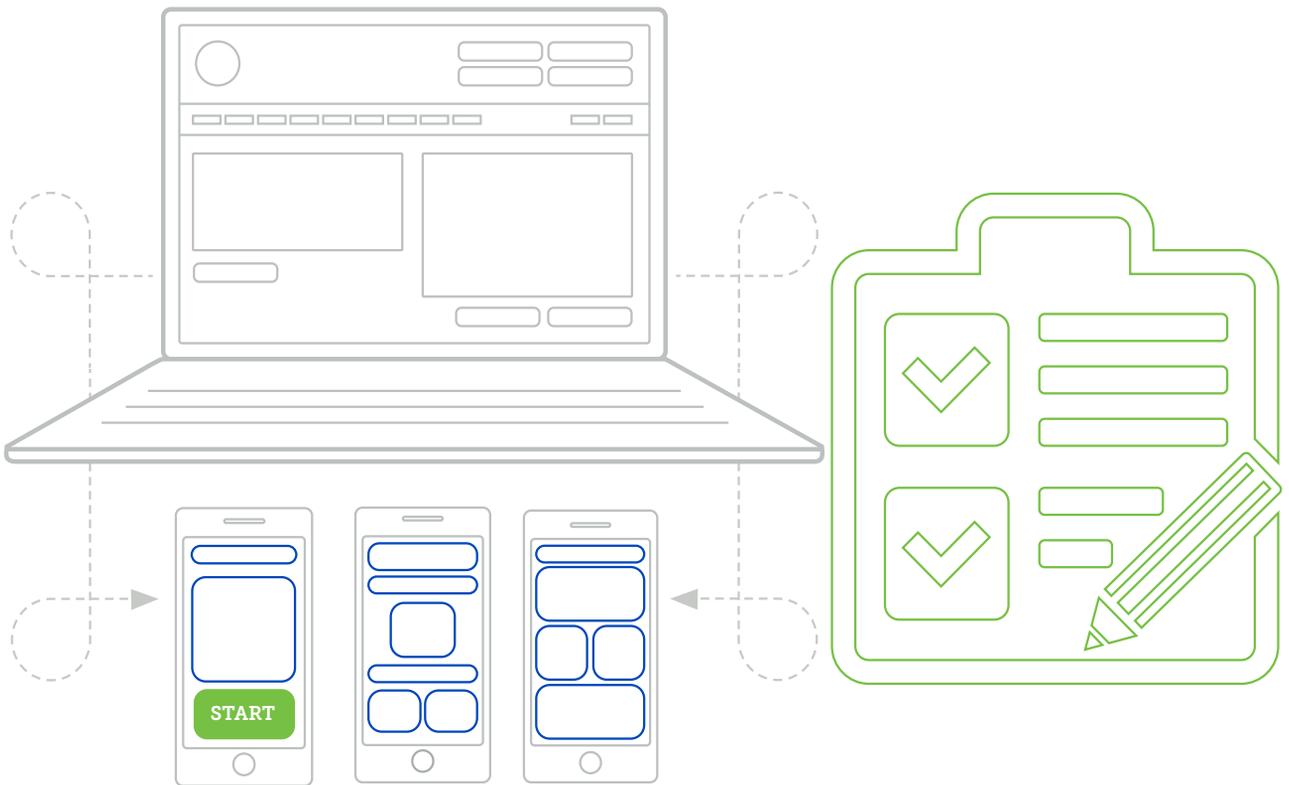


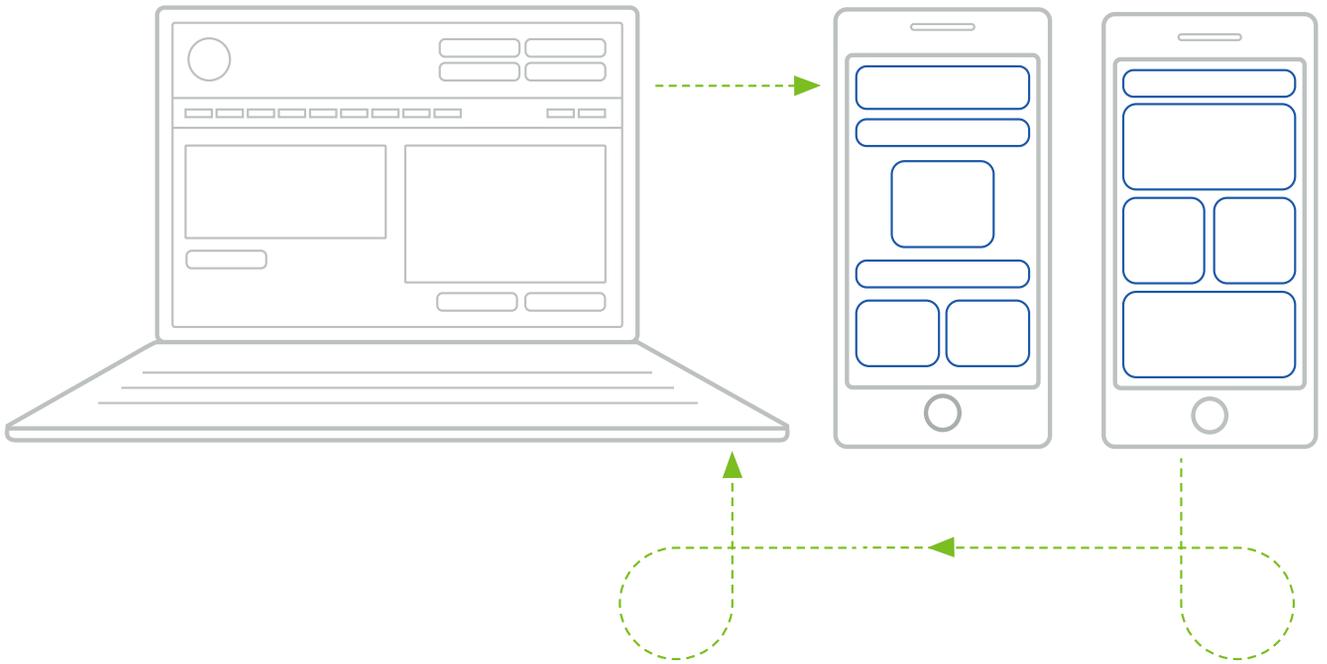
06

How to Guide How to create mobile surveys and forms



06

How to Guide How to create mobile surveys and forms



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Welcome to a better way to engage your customers.

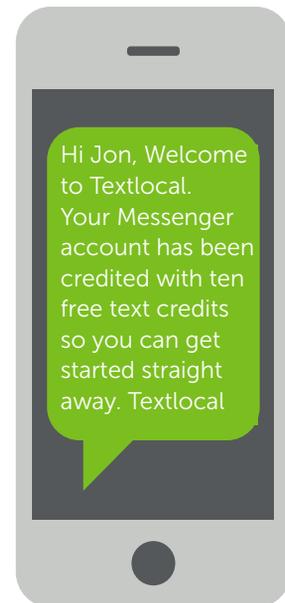
Your Messenger account has been credited with ten free text credits so you can get started straight away.

One standard text message can contain up to 160 characters. If you use more than 160 characters in your text, two or more text credits will be used, just like on your phone.

Before you send your messages, make sure you have enough text credits. If you need additional credits, these can be purchased online using a credit card, debit card or PayPal.

Looking for 1,000 credits or more? We can raise an invoice and payment can be made by bank transfer.

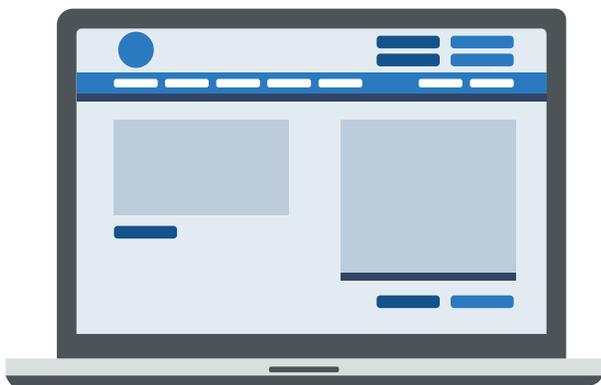
If you need more than 50,000 credits please contact us directly to discuss your campaign plans.



Price promise

Textlocal continually review the SMS prices on offer to customers, to make sure you benefit from a competitive rate. We only partner with the leading global networks to send texts to UK mobiles, unlike some providers that use cheaper foreign networks. This way, we can guarantee you the best levels of service.

If you find a more competitive quote on a like-for-like service, please call us on 01244 752299 and we promise to at least match it or in most cases beat it.



Ten free text credits to get you started

Are you compliant?

Your customers are important to you – and to us. However you choose to compile your contact lists, it's essential that you stay compliant with current recommendations. Here's a summary of the key facts.

Textlocal Tip
Make sure your mobile communications are compliant with best practices

The ICO (Information Commissioners Office) states that organisations may not send a text message to a customer if they have not agreed to it, unless the following apply:

- The sender has obtained your details through a sale or negotiations for a sale
- The messages are about similar products or services offered by the sender
- Your customers were given an opportunity to opt-in to receive text messages or a simple way to opt-out from all text messages.

For more information on staying compliant, to make the most of your text message communications, visit: www.ico.gov.uk

Messenger helps you stay compliant

Your customers are important to you – and to us. However you choose to compile your contact lists, it's essential that you stay compliant with current recommendations.

Opt-outs

We recommend you include an opt-out path on every message sent. This gives the recipient a chance to easily remove themselves from your database, and from any future messages.

Include opt-out message

It's simple to manage opt-outs with Messenger

By ticking one box, Messenger will add an 'opt-out' path to every message, giving you peace of mind. This gives a simple instruction to the recipient to remove themselves from your database.

By texting your free opt-out Keyword to the Short Code, e.g. 'text **KEYWORDSTOP** to 60777', that particular mobile number is automatically removed from all of your contact groups and updated in your opt-out list. The number will stay on the opt-out list until the recipient chooses to opt back in.

Messenger will not send a text to any number on your opt-out list

When you add new contacts into your Messenger account, Messenger will automatically strip out any numbers which have previously opted-out of your messages.

You can also manually opt-out mobile numbers – perfect if your customers contact you directly with an opt-out request.

Ready to get started?

You've opened your Messenger account, now you're ready to start creating mobile surveys and forms to include in your text message campaigns.

Mobile forms have risen in popularity, as a real alternative to paper-based and email forms. They offer a simple way for recipients to complete your form while offering a reliable way to deliver and report on them. This guide covers everything you need to know about creating mobile surveys and forms, to improve overall engagement and response when collecting information from your customers and contacts.

An introduction to surveys and forms

Messenger's surveys and forms tool lets you create and send mobile optimised web surveys, complete with a range of data capture tools. Like mobile web pages, surveys can be sent using a short link within your text message, so they are easily accessible by anyone with a smartphone.

Mobile forms can be a simplified version of a desktop web form, without the distraction of adverts and promotions, or a completely different version with a simpler and cleaner interface.

Why mobile surveys and forms?

This is an easy way to gather information directly from your customers, and its optimised for mobile so it's easy to complete. When the survey or form is submitted, the responses are stored immediately in your Messenger account.

But that's not the only benefit:

- [There's no cost to receive replies](#)
- [You can create surveys and forms for free – and as many as you need](#)
- [All the response data can be easily exported to Microsoft Excel for in-depth analysis](#)
- [It's a low cost format compared to other popular survey and form tools](#)
- [You can use custom fields to personalise your survey or form for each recipient – to encourage a better response](#)
- [The success of text messaging will drive an increase in open and response rates.](#)

Example uses

Surveys and forms can benefit any business. If you need to collect information from your customers, it makes sense to include surveys and/or forms as part of your ongoing communications. Here are a few ideas from our customers:

Applications

- Loan applications
- Insurance claims
- Educational courses
- Contracts

Booking forms

- The handset has been without signal for 48 hours
- The handset is outside of the UK and not using roaming data or isn't switched on
- The recipient's message inbox is full and unable to receive any more messages until some are deleted

Surveys

- Customer feedback surveys
- Opinion polls
- Content for thought leadership papers

Registrations

- Brochure downloads
- Newsletter sign-ups
- Register for a gym class
- Training course registrations
- Newsletter sign-ups

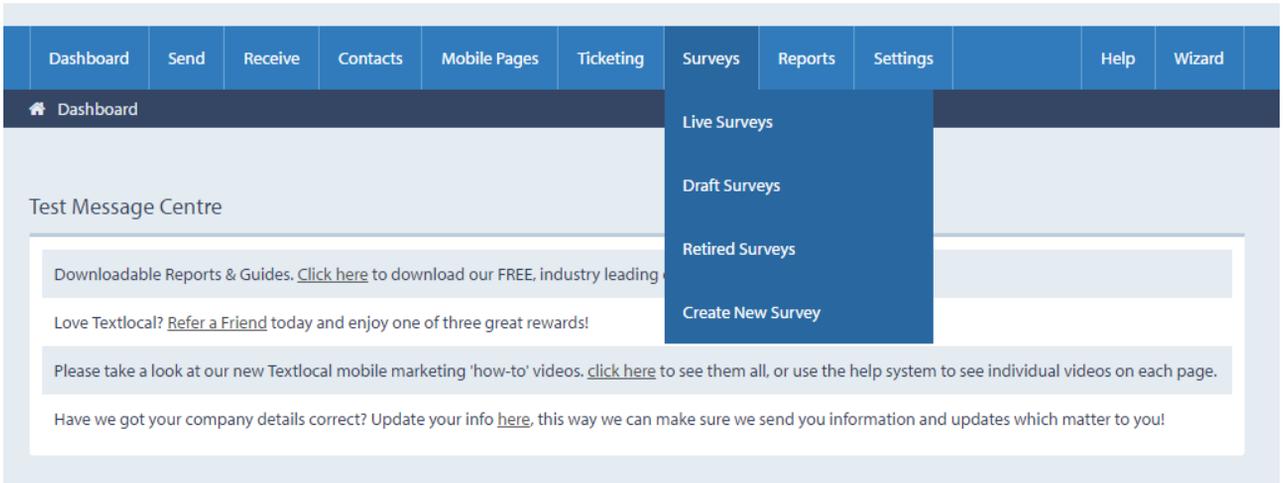
Competitions

- Entry forms including multiple choice questions and free text fields

Creating a mobile survey

Step 1

Log into your Messenger account and click 'Surveys' on the top navigation bar.



Step 2

Select the survey you want to launch, or start a brand new one.



Live Surveys – these are currently Live and being completed.

Draft Surveys – these are surveys that you have started to build but not published.

Retired Surveys – these are expired and can no longer be completed.

Create a New Survey – build a brand new survey.

Setting up your mobile survey

This allows you to give your survey a title and set any time sensitive parameters. You can always come back to this section, so don't worry if you need to change something later on.

Survey Settings

Survey Title
Displayed at the top of the browser window

Description
Basic description to help identify the survey

Survey Start Date & Time
Survey responses will be accepted from this time

No start date selected. Click here to set one.

Survey End Date & Time
Survey responses will stop being accepted after this time

No end date selected. Click here to set one.

Save Survey Settings

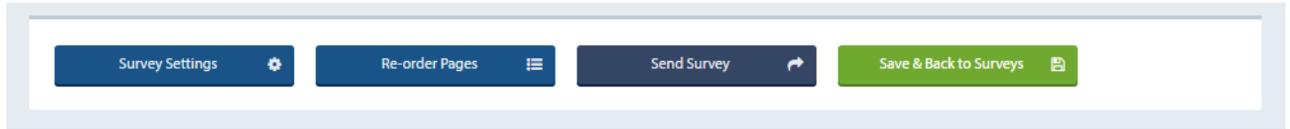
Advanced Options (Click to show)

- Send as Secure?
Data from replies is sent via a secure channel (SSL)
- Mobile Device Info?
Customers device information will be stored for your analytics purposes

1. Give your survey a title. This will appear at the top of the page.
2. This is a descriptive name, primarily used for your reporting. Keep it simple but make it clear what the survey is for.
3. If you don't want recipients to complete your survey more than once, select 'OFF'. This typically applies if you're running a competition where recipients can only submit their answers once.
4. If your survey is time sensitive, enter a start and expiry date. If you add an expiry date, you can also set up the message that will be displayed if a participant tries to complete the survey after it has expired.
5. Always remember to save your settings.

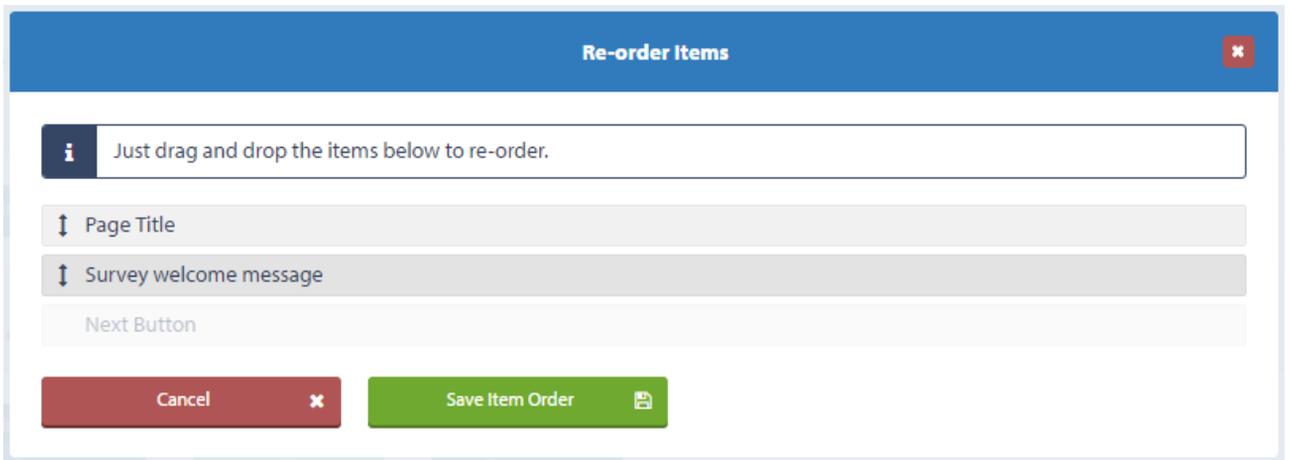
Setting up your survey pages

This page is home to everything you need to create a survey; and you can create as many as you need.

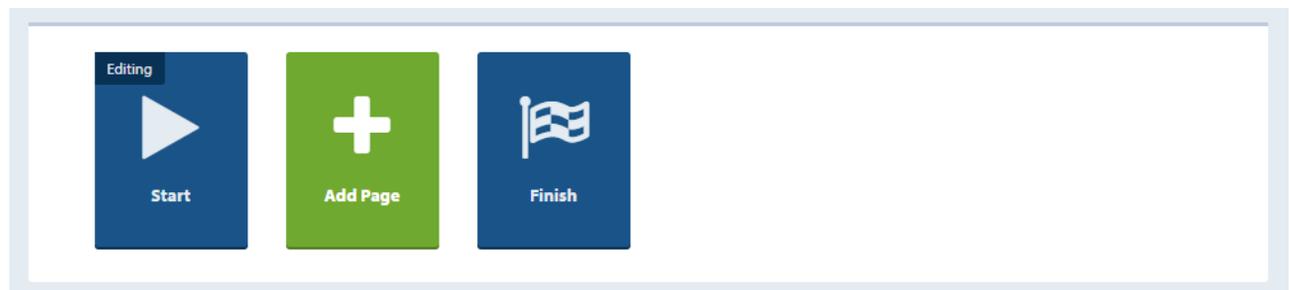


The top four boxes let you navigate around existing surveys, change any settings, re-order any pages and send a survey once it's complete.

If you choose to re-order the pages in your survey, a pop-up box will open where you can 'drag and drop' the pages into the correct order.



These three sections below are a critical part of building your survey. Add as many pages as your survey needs, or keep it simple with a single page and submit button.



Creating the page content

The image below displays a blank template for a survey page. The title and welcome message elements are optional so can be removed. You can customise your survey by adding new elements – just click ‘add item to page’.

Use ‘Re-order items’ to put the elements in the correct order.

‘Preview Page’ lets you to see exactly what your page will look like on an iPhone or Samsung device (this is also an indication of what it will look like on any smartphone).

‘Start Survey’ can be renamed if required. Alternative ideas include ‘Continue,’ ‘Submit’ or any other call-to-action that fits with your survey.

The screenshot shows a user interface for editing a survey page. At the top, there is a header 'Page / Item Settings' with a help icon. Below this are three buttons: 'Add Item to Page' (green), 'Re-order Items' (blue), and 'Preview Page' (dark blue). The main content area is titled 'Page: Start' and contains three elements:

- Page Title (Biggest Size Title)**: Includes 'Remove', 'Edit', and 'Copy' options.
- Survey welcome message (Text Display Paragraph)**: Includes 'Remove', 'Edit', and 'Copy' options. Below the title is the text 'General Text Display'.
- Next Button (Button)**: Includes an 'Edit' option. Below the title is a button labeled 'Start Survey'.

Adding elements to your survey pages

An element could be a header, an image or a form that you add to your survey. By clicking 'Add item to page' you will see the options available.

Textlocal Tip
Personalise your survey by mail merging in custom fields. This also helps increase response rates.

DISPLAY ITEMS



Four blue buttons for display items:

- Title
- Title
- Title
- Text

One blue button for an image:

- Image

DATA CAPTURE

Eleven blue buttons for data capture elements:

- Long Text Area
- Short Text In
- Dropdown
- Option 1 / Option 1
- Checkbox
- Radio
- Star Rating
- Date Picker (06-10-2016)
- Time Picker (11:39:01)
- Device Location
- Hidden Data Field

Display items

- **Title** – use this option to add a title or header, selecting the size you want the text to be.
- **Text** – add text to your existing elements, or alter the existing text.
- **Image** – upload an image to Messenger and select where you want this to appear on the page.

Data capture

- **Long text area** – use this element for free text responses.
- **Short text area** – for standard length responses.
- **Dropdown** – lets respondents select their answer from a pre-populated drop down list.
- **Options** – include this element where you want to offer multiple choices.
- **Checkboxes** – use this element if you want respondents to select more than one answer.
- **Radio buttons** – use this element if you only require one answer.
- **Star rating** – use 5 or 10 stars to canvas opinion. Select how many stars you want pre-filled.
- **Date picker/time picker** – select specific dates and times using simple scroll-through selectors.
- **Device location** – select this element if you need participants to include their current location.
- **Hidden data field** – use this element if you want to add any unique reference data against each response. This could be a campaign reference; content will be hidden from the respondents.

Hints & Tips

- If you choose to add an end date when setting up your survey, make sure you include a description to give the respondent a polite reminder that their survey has expired.
- Think about how you want to retrieve the information from the survey. Do you want respondents to give a unique answer or select a response from a dropdown list? Remember check boxes allow respondents to select multiple responses.
- Let your respondents know which questions are mandatory. If you need their email address to follow-up on completed surveys, make it a compulsory field.
- Personalise your survey using custom fields.
- Using multiple pages rather than scrolling down a mobile screen will give respondents a better experience. If you're using multiple pages, don't forget to include the total number of pages your survey has, so respondents know how close they are to completing it.
- Make your survey admin and reporting easier by naming the pages and elements logically.
- Use the 'Copy' function to quickly copy images and logos to other pages, rather than re-uploading content.
- Copy an existing survey if you want to run duplicate versions, otherwise you will have a completely different set of results.
- When using the star rating element, it will default to 3 out of 5 stars. If respondents choose not to submit a rating, the results won't be noticeably skewed.

Sending your Survey

Surveys and forms are accessed via a short link in a text message, so it's a similar process to sending a basic text message. To find out more, please see our guide '[How to send SMS using Messenger.](#)'

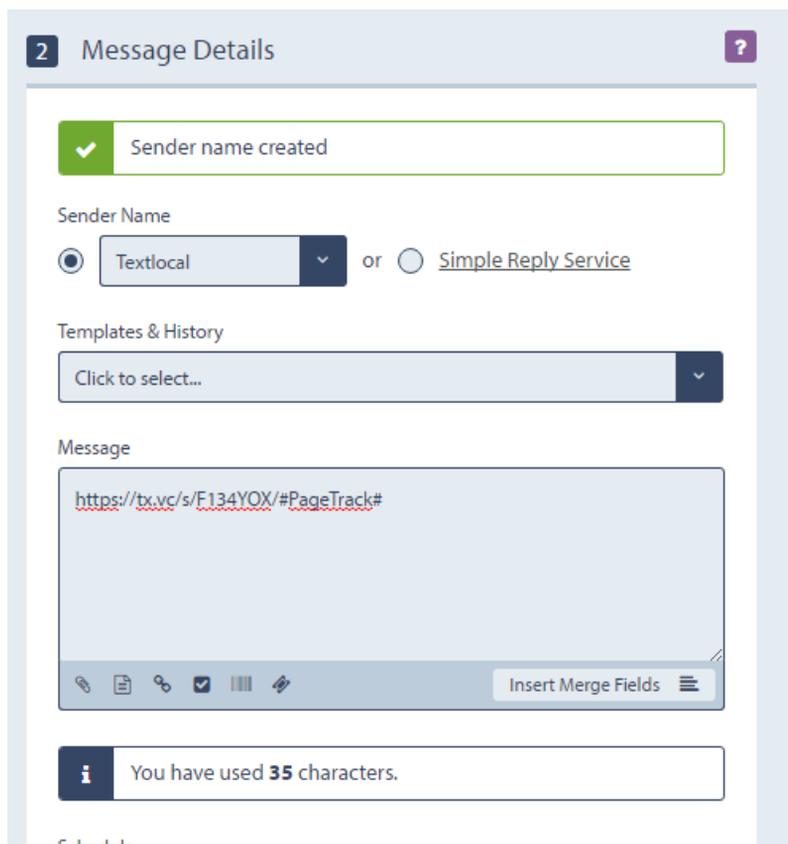
There are two ways to send a mobile survey using Messenger; either directly from the survey creation tool or via the '[Send SMS](#)' page.

Textlocal Tip
A survey can be as simple as one page and one question!

Send a survey using the survey creation tool

Once you've built and tested your survey, click the '[Send Survey](#)' tab along the top of the page. If you've set a start date for publishing the survey, you will be prompted to publish it before you send it.

Once published, the link to the survey will appear in the text message field, complete with a tracking link so you can track who opens your message and the device type.



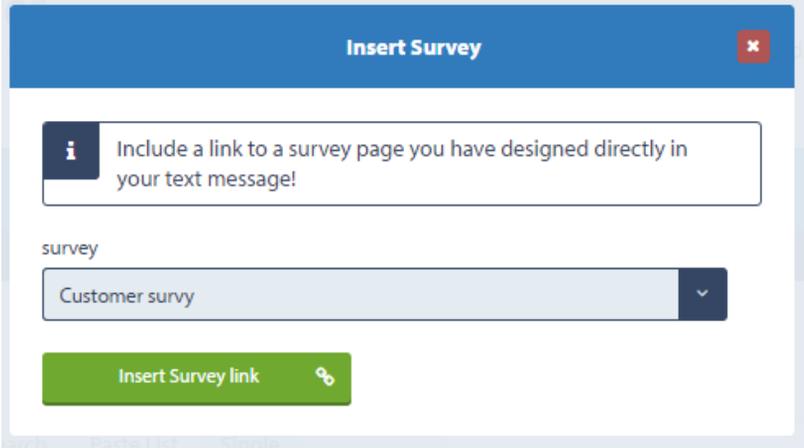
Now all you need to do is complete your text message, choose your sender name, add an opt-out path (recommended) and select a contact group.

If you need help building your contact lists, read our guide '[How to create a contact list](#)'.

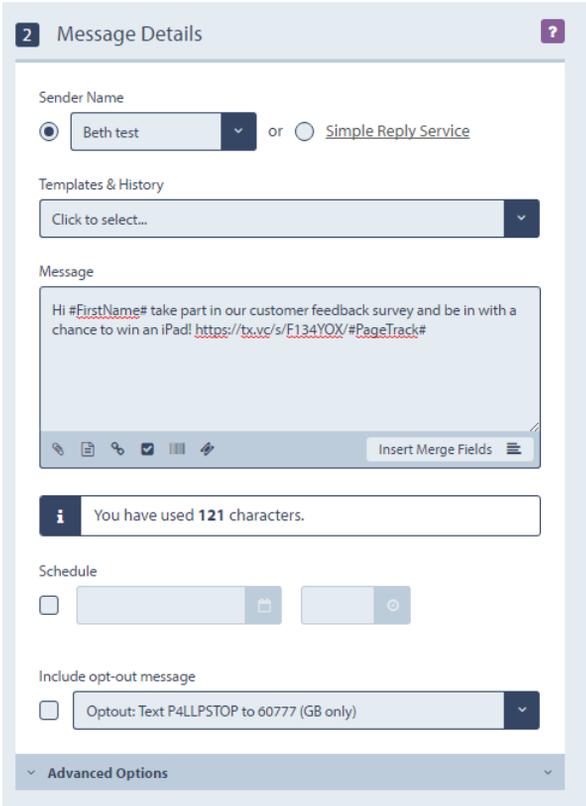
Manually insert a survey link into a text message

From the 'Send SMS' page, click on the 'survey' icon below the text box. A drop down list will appear showing all of your published surveys. Select the appropriate one.

Textlocal Tip
Always send a test message to your handset – to check links work and the formatting is correct.



Never send a text message that just contains a link. Make sure you explain what the link does, what action you want the recipient to take and what's in it for them. Include an additional call to action in case the end user doesn't have a smartphone.



Reporting on sent surveys

All the results from your completed surveys will be stored in your Messenger account, just click the 'pie' symbol next to the survey you want to analyse.

Textlocal Tip
Like standard text messages, always remember to include an opt-out path.



Select the date range you want to review and the related results will be displayed. Messenger's reporting function includes:

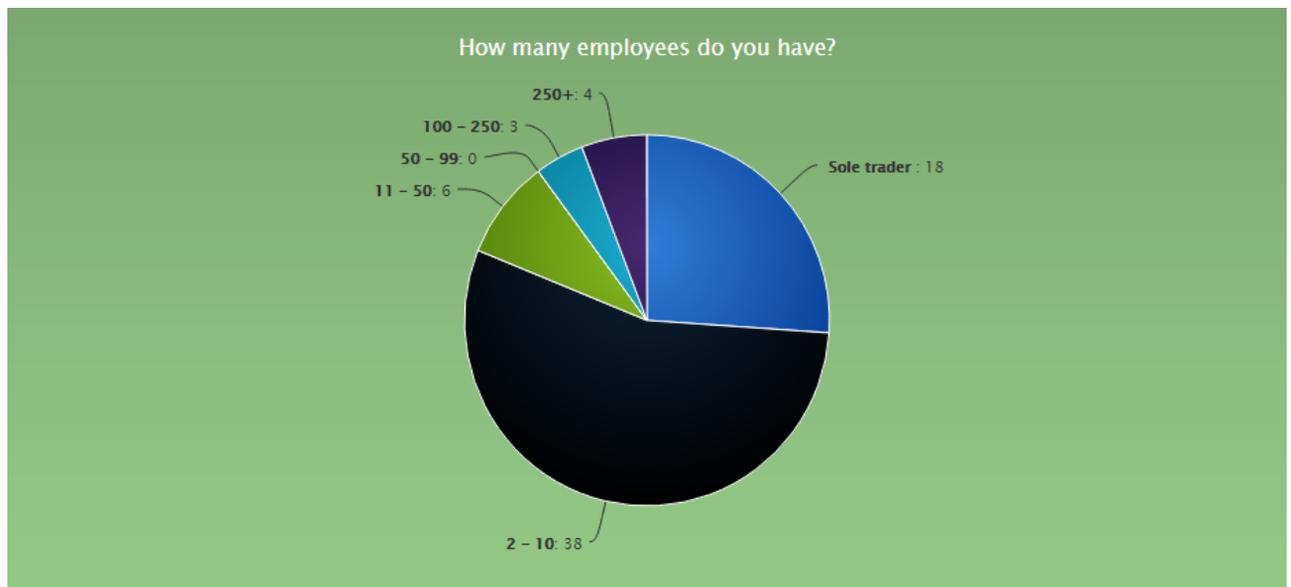
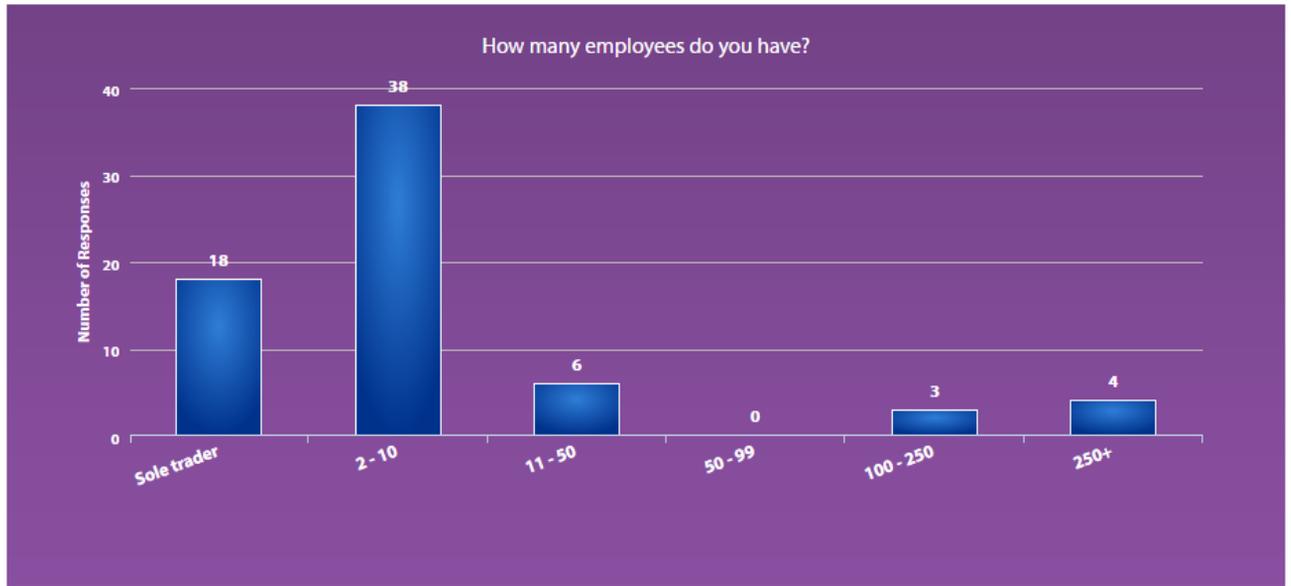
- The individual responses to each question, displayed in graphs and charts
- The ability to export the data to Microsoft Excel for in-depth analysis
- Statistics on the mobile device used and screen resolution.

This is how the results to the star ratings will be displayed:



What your reports look like

Your survey results are displayed in more than one form of chart type, so you can select the one that best suits your purpose. You can also create your own charts and pivot with the data if you export the file to Microsoft Excel.



Survey Pricing

There are two payment options available; inclusive of when sending survey links to suit your usage. Both options include the cost of sending the text message.

Pay-As-You-Go

Simply With this option you pay for every survey you send, as and when required out. All completed survey data is held s are collected, free of charge for up to three 3 months after the send date.

Survey builds: **FREE** – design as many surveys as you wish need.

Survey text cost: **2 SMS credits per survey sent**. If you use more than 160 characters an additional 2two credits will be charged.used

Responses: these are **FREE** with – ddata is available in Messenger for three3 months after the send date.

Contract

Take out a 12-month With a contract and you can send as many surveys as you likerequired during that period. All completed survey results data isare stored separately. Results from all completed surveys are stored in Messenger for as long as your contract is live.

Survey Text Cost: **1 SMS credit per survey sent**. If you use more than 160 characters an additional credit will be charged.

Pay Monthly: £25 per month

6-Month contract: £120 (includes a s 20% discount)

12- Month contract: £180 (includes as 40% discount)

Managing your opt-out's

We strongly advise including an opt-out message on all outbound texts, e.g. 'text TLSTOP to 60777'. Messenger has inbuilt functionality which automatically removes any mobile numbers which have opted-out from your contact list, so you don't have to do anything. This gives peace of mind, knowing that you can't send a message to someone who has opted-out.

By ticking one box, Messenger will add an 'opt-out' path to your messages. This gives a simple instruction to the recipient on what to do if they would like to remove themselves from your contact list, so they no longer receive any messages from you. The number will stay on the opt-out list until the owner chooses to opt back in.

Include opt-out message

 Optout: 

Messenger will cleanse the contacts you upload, stripping out any numbers which have previously opted-out of your messages. You can also manually add opt-out contact numbers to the list – perfect if a customer contacts you directly with an opt-out request.

Your data is safe with Textlocal

We understand how important your contact data is to you and to your business. At Textlocal, we comply in the way we handle all consumer data. We will not pass on any of your data to any third parties, keeping it confidentially, secure and in compliance with the Data Protection Act 1998.

For further information, please view our [SLA](#) and [Privacy Policy](#)



Need more help?

If you need any further help or guidance using Messenger please call our dedicated support team on [01244 752299](tel:01244752299) or visit our website www.textlocal.com for more help and support.



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Text **GO** to **62277**



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