USER MANUAL

SurveyLab

Professional online surveys

INDEX

Introduction

Welcome and thanks for choosing us. SurveyLab is online survey tool that allows you to conduct any survey research or test. It was designed to reduce the time required to create survey and to automate process of data collection and report creation. BASIC system account is available for free.

Log In

You don't have an account? Create one. It is quick and easy. In order to log into the system you need to be a registered user. In order to begin registration you just need to press **Sign Up** button.
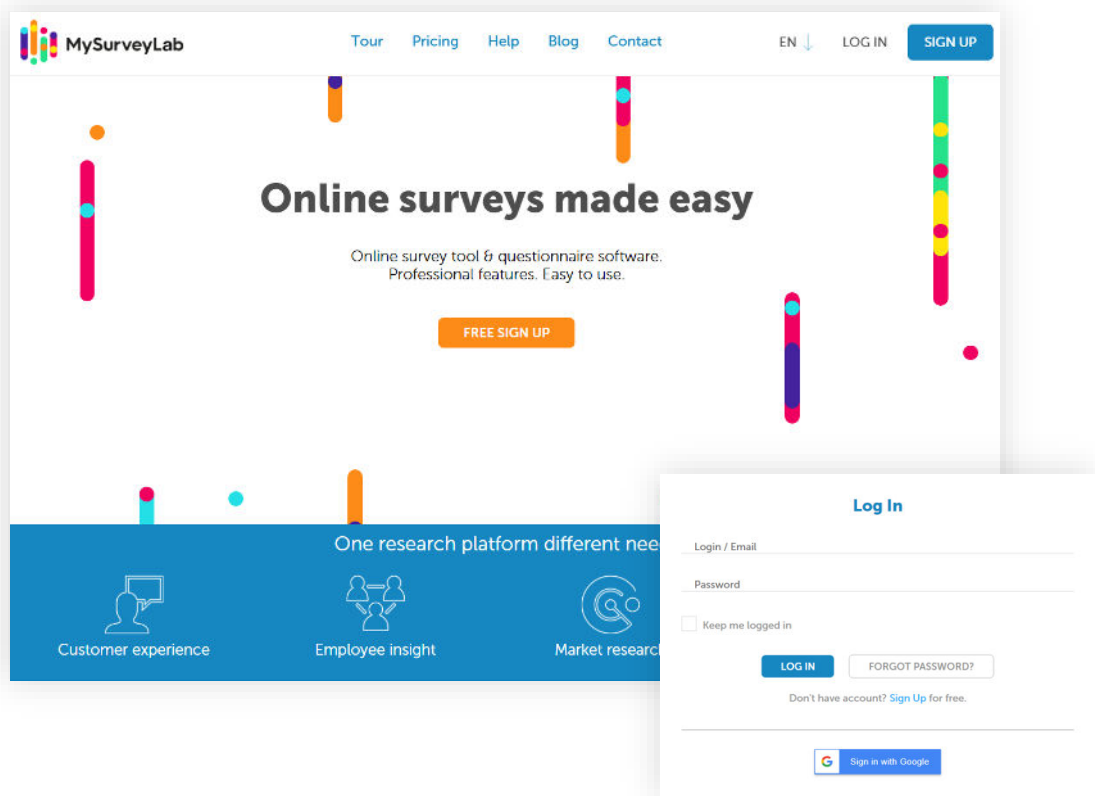
System is available in two language versions (Polish and English). You can change your working language any time. In order to change language just choose the proper one at the top part of the screen.

Sign Up

New user registration is quick and free of charge. In order to sign up (create account) you just need to fill in a short form or press button Sign in with Google. In order to fully activate your account please click activation link in email.

* We marked required fields with a star.

Sign Up

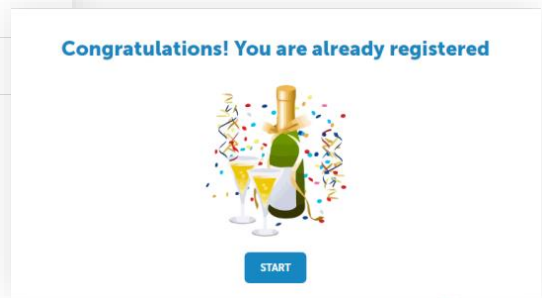Join mysurveylab.com! It is quick and free.

Email

Password

☐ I have read, understood & agreed to the Terms of Use *

SIGN UP

Have already an account? Log In.

G Sign in with Google

Congratulations! You are already registered

START

Hello,

Welcome to mysurveylab.com online survey tool. With mysurveylab you will be able to create professional surveys and test, collect responses and analyze survey results in a real-time.

You received this email because to complete registration process we need to verify your email address. In order to verify your email address and activate your account, please click on the link below:

https://www.mysurveylab.com/lng/en/pageTag/UserActivate/activationCode/41e19fa008bea2289fa242e529820395/

We have activated 14 day free test plan for you, so you can learn what we can do. Buy subscription and create professional online surveys.

Thank you for using mysurveylab

- mysurveylab team

Hello,

Your account has been activated successfully. We have activated Professional plan for you for free. You can test it for 14 days. You can purchase your subscription or resign from the service anytime.

How to start work with surveys:

1. Create survey
2. Create collector
3. Collect responses
4. Analyse results

Find out more on our online help FIRST STEPS

If you want to test Enterprise plan or in case of any questions please contact us: sales@mysurveylab.com

Thank you for using mysurveylab

- mysurveylab team

NOTE. If you haven't received activation email, please check SPAM folder in your mailbox. Anti-spam filters sometimes do make mistakes.
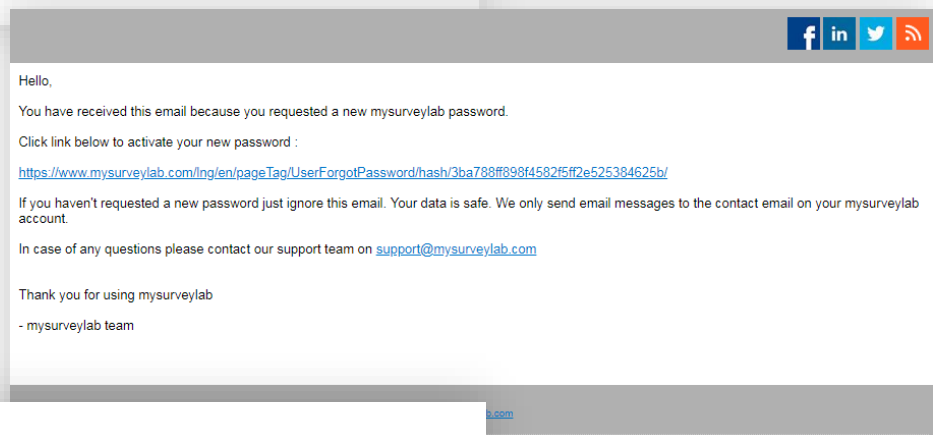
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Password Reminder

You forgot your password and you can't access your account? Don't worry - enter your email address that is connected with your account. System will automatically send an activation link for your new password to your mailbox. Than just write a new password.

Password reminder

Email

SUBMIT

Hello,

You have received this email because you requested a new mysurveylab password.

Click link below to activate your new password :

https://www.mysurveylab.com/lng/en/pageTag/UserForgotPassword/hash/3ba788ff898f4582f5ff2e525384625b/

If you haven't requested a new password just ignore this email. Your data is safe. We only send email messages to the contact email on your mysurveylab account.

In case of any questions please contact our support team on support@mysurveylab.com

Thank you for using mysurveylab

- mysurveylab team

Set a new password

New password

Retype password

SAVE

Subscription & Available Plans

Try mysurveylab.com for free. You can choose any plan and use it for free during 14 days. Moreover, we will never remove surveys or responses from accounts.

Available Plans

Starter, Standard, Professional and Enterprise plans give you a variety of additional useful features. In order to upgrade into Starter, Standard, Professional or Enterprise account, after signing into the system, go to Upgrade.

	Starter	Standard	Professional	Enterprise
Design survey				
Number of surveys	unlimited	unlimited	unlimited	unlimited
Number of questions	unlimited	unlimited	unlimited	unlimited
Number of contacts	unlimited	unlimited	unlimited	unlimited
Survey templates	✔	✔	✔	✔
Required questions	✔	✔	✔	✔
Random answer choices	✔	✔	✔	✔
Custom logo	✔	✔	✔	✔
Survey skins	10	custom skins	custom skins	custom skins
Password protection	✔	✔	✔	✔
Advanced skip logic	-	-	✔	✔
Data collection				
Number of responses	1000/month	2500/month	7000/month	unlimited
Limit survey time	-	✔	✔	✔
Results analysis				
Data filters	✔	✔	✔	✔
Time filters	-	✔	✔	✔
Export	.csv	+ .xsl, .xlsx, .SPSS	+ PDF	+ Power point
Number of users	1 user	2 users	2 users	unlimited

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If number of responses connected with different plans is not sufficient, you can buy additional packages of responses.

What are responses? Responses are nothing else than surveys completed by the respondents. As a single response we count only filled in and stored in the database surveys. We don't count total number of surveys or emails send by you. It means that you will pay only for collected responses.

In order to learn more about our offer, please check our actual prices on https://www.surveylab.com.

New Survey (Test)

In order to create new survey (test):

1. Log in to the system and press
2. **+ ADD SURVEY** button

Now you can add questions to your survey. Each question has its code number (Q1, Q2, ...) that doesn't change despite modification you make to the survey. Code numbers are visible only in the survey design. You can modify or move questions anytime.

To create a copy of existing questionnaire:

1. Select survey you want to copy and click on **Copy** icon

Survey Design

mysurveylab.com provides a variety of tools that allow to customize a survey. You will be able to divide survey into blocks and pages, change colours, place logo or graphical elements to make your survey more pro.

Single or multiple choice	Matrix	Matrix menu	Open ended	Numeric or slider	Date or time	Multimedia or description
NPS	Ranking	Drag & drop	Heat-map	Hot-spot	Upload file	Carry forward	Question bank
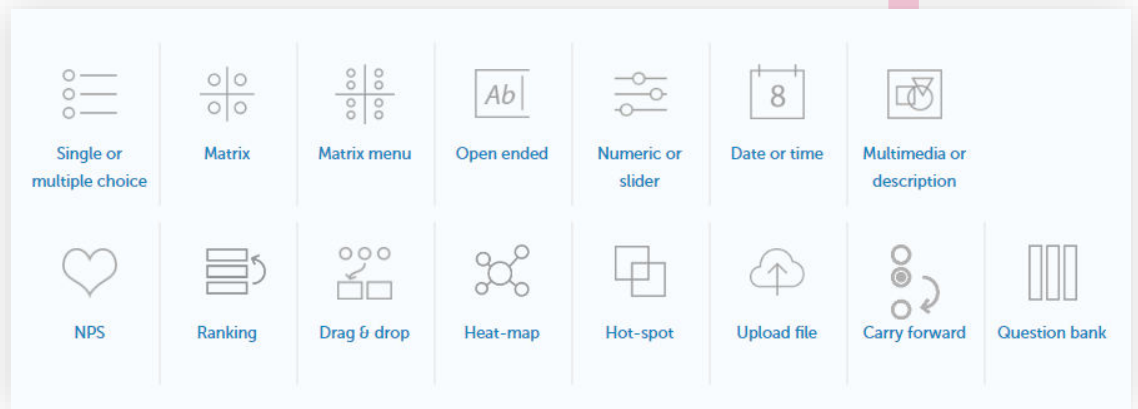
Design survey :

1. Select survey and click on **Design** button to edit survey

13
Apr
2018

Customer satisfaction survey

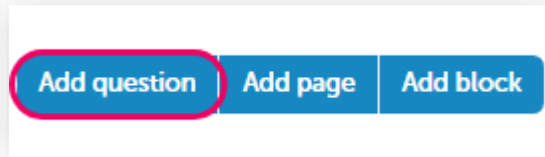✎ Design   ⌇ Collector   ⊪ Report   ▭ Copy   ✕ Delete
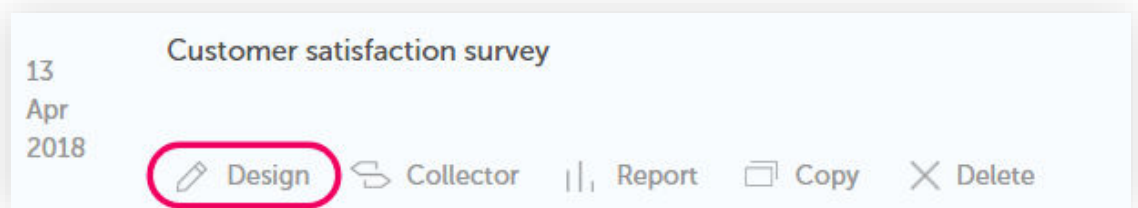
In order to change survey name or page name just click on it.
In order to simplify survey completion process, you can divide survey into several pages. To do it press **New page** button. Each page can have its own title.
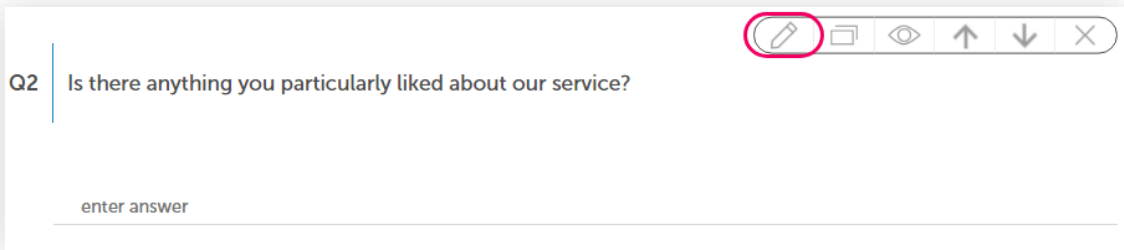
Questions

To add new question :

1. Press **Add question** button
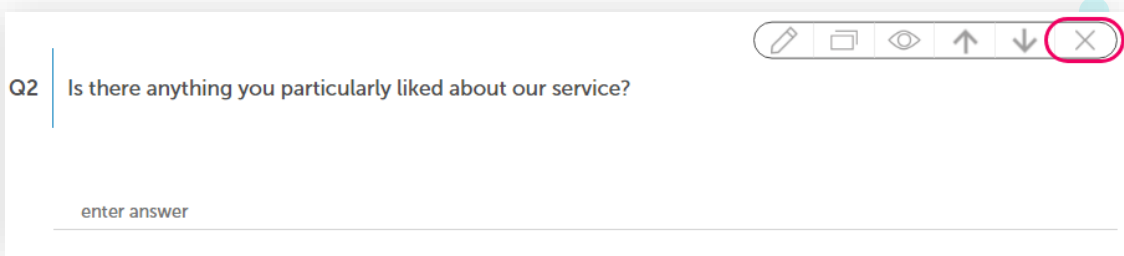2. Select question type.

To edit existing question :

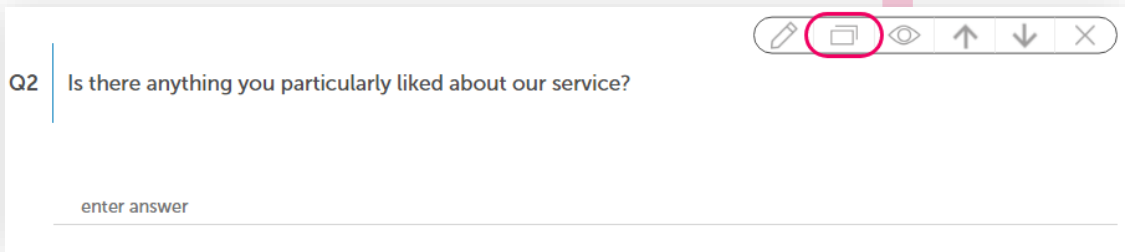1. Press **Edit question** button

To delete question :

1. Press **Delete question** button

2. Confirm action

3. Question (and all collected responses for this question) will be permanently deleted

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Questions

To copy question :

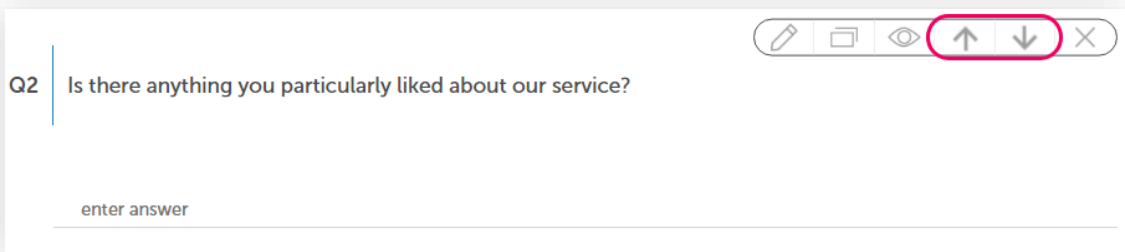1. Press **Copy question** button
2. Question copy will be create below copied question

To move question :

1. Press **Move question ^** button, to move question up
2. Press **Move question v** button, to move question down

Branding: Survey Skins

Survey branding enables you to add survey logo, change colors and fonts. We provide you 10 predefined survey skins that can be adjusted to your own needs. You can also save created skin for further usage.

To add new survey skin:

1. Press **Branding** button

2. Select skin you want to use or press Copy button to copy selected survey skin

3. Press Edit button to set logo placement, colours, font size or footer visibility

4. Enter a name for your new survey skin, you will be able to use it for your other surveys

5. Changes will be saved automatically
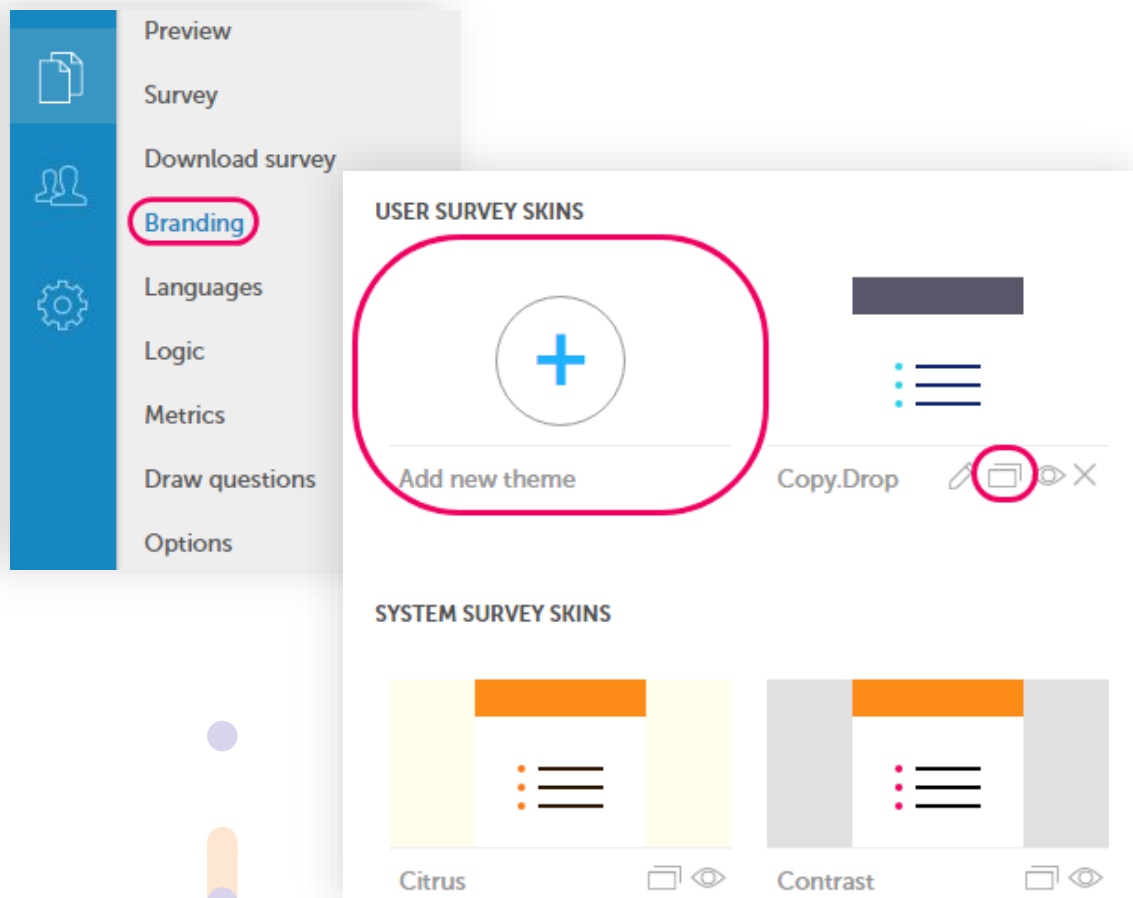
Branding: Add Logo

You can make your survey look more professional by adding a logo. Logo by default will be placed in a top left corner of your survey, but you can change its position.

To add logo:

1. Press **Branding** button placed in the left menu
2. Press **ADD NEW THEME,** or press **EDIT,** button to edit existing survey skin, **or create** survey **COPY**
3. Press **Logo** button and then **Add logo**
4. Select logo on your drive or upload logo from your computer

Layout	▶
Navigation	▶
Logo	▶
Fonts	▶
Welcome page	
Survey pages	
Ending page	
Header	
Footer	
Questions	
Widget	

Logo	◀ BACK
Logo image	
Logo size	Medium ▼
Logo placement	left site ▼
Display on PC	⬤
Display on Tablet	⬤
Display on Mobile	○
Display for email	⬤
embedded surveys	

Survey Logic: Types

Survey logic allows to design any logical conditions for surveys and test. Conditions can be based on any event, including certain answer choice selection, collector data, contact data or device type, that is used by the respondent.

Available types of logic

Logic type	Description
End survey	Finishes survey.
Go to page	Moves respondent to the selected page.
Hide page	Hides selected page.
Hide question	Hides selected question.
Show page	Displays selected page.
Show question	Displays selected question.

Available types of expressions

Expression	Description
QUESTION	Logic based on questions.
PAGE	Logic based on pages.
BLOCK	Logic based on blocks.
COLLECTOR	Logic based on collector data.
CONTACT	Logic based on contact data.
DEVICE	Logic based on device type (pc, tablet, smartphone).

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Survey Logic: Add Survey Logic

To add survey logic :

1. Build survey (add at least two questions and if needed divide survey into pages)
2. Press **Logic** button
3. Select type of logic and question for which you will create logic
4. Press **+ ADD EXPRESSION** button
5. Select what type of event will be triggering logic (question, page, block, collector, contact, device)
6. Set logic parameters
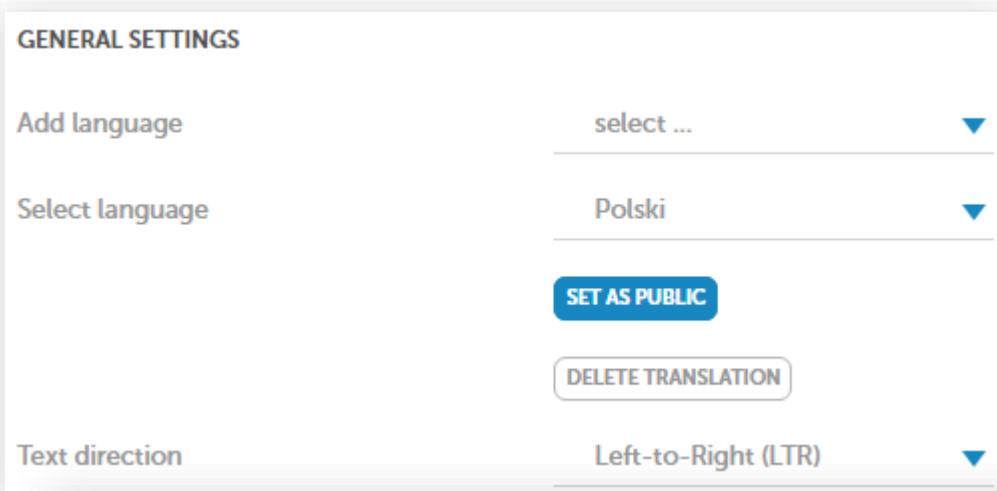7. Changes will be saved automatically

Multi-language Support

SurveyLab can support any language and multi-language surveys. It means that for each questionnaire you can add multiple translations. The system will automatically detect language version of respondent web browser and display proper language.
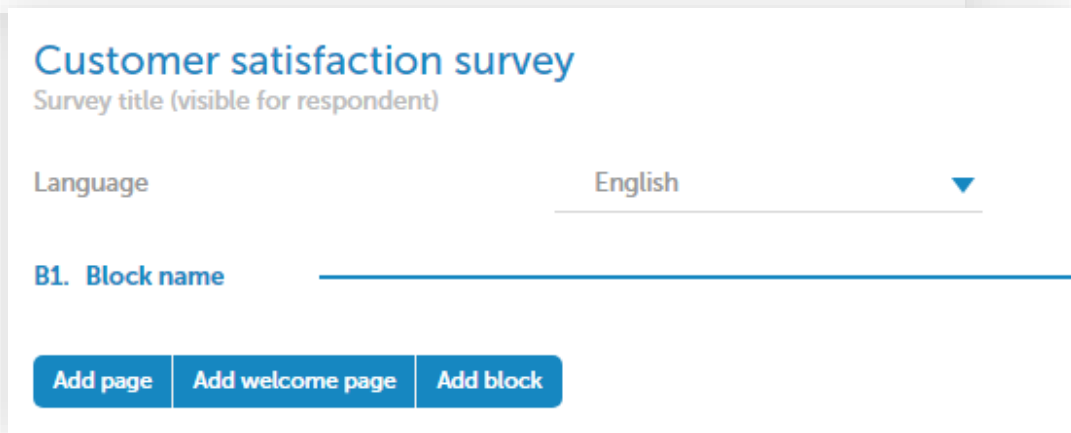
To add new survey language version:

1. Press **Languages** button
2. Use **choose language** menu to add new language
3. Press **SET AS PUBLIC** button
4. Go to the **Survey** to edit the translation

GENERAL SETTINGS

Add language	select ... ▼
Select language	Polski ▼
	SET AS PUBLIC
	DELETE TRANSLATION
Text direction	Left-to-Right (LTR) ▼

Customer satisfaction survey
Survey title (visible for respondent)

Language	English ▼

B1. Block name _____

Add page Add welcome page Add block

Data Collection

To start responses collection for your survey you need to create survey collector first. You can create as many collectors for your survey as you need. Each collector can be sent with a different method and with a different set of parameters.

To create new collector:

1. Select survey for which you want to add collector and click Collectors button
2. Press **+ ADD COLLECTOR** button
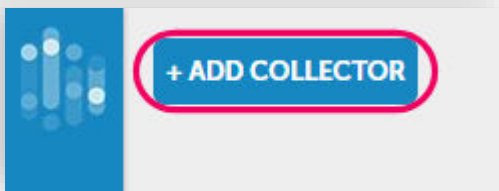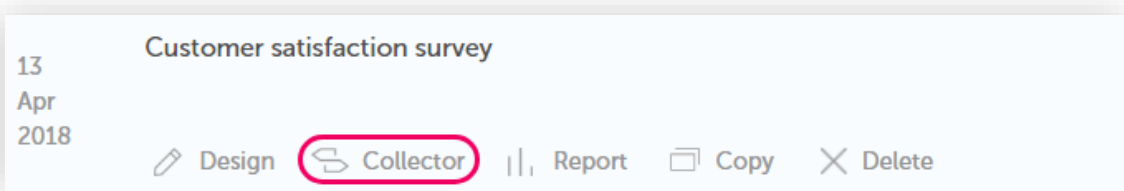
Set survey distribution method:

- **URL Link, Web Widget**. Select this option if you want to collect responses through web link (URL), Facebook, pop-up, or web widget.
- **Email / SMS invitations**. Select this option if you want to send survey invitation directly from the surveylab system, as an email, SMS or email embedded survey.
- **Mobile app.** Select this option to collect data offline with a mobile app.
- **360 feedback**

Collector Types

Collectors allow you to collect response for a survey. Each survey can have any number of collectors with individual settings. You just need to enter collector title. All other parameters have been predefined for you for easy change and set up.

SurveyLab provides a range of survey distribution methods:

- **+** Send survey link using a standard email application
- **+** Create web page link to your website
- **+** Web widget
- **+** Popup invitation for your website
- **+** Survey popup for your website
- **+** QR code
- **+** 360 feedback
- **+** Mobile app
- **+** Send emails from SurveyLab
- **+** Send email embedded survey
- **+** Send SMS surveys

Collector Options

BASIC CONFIGURATION

Survey behaviour after completion:

Jump to website. After survey completion respondent will be automatically redirected to a selected website. For example https://www.surveylab.com

Display summary report. After survey completion system will automatically display a report with survey results.

Start new response. After survey completion respondent will be automatically redirected to the first page of a survey.

Generate contest code. The system will generate and display contest code on survey end.

Non-active message. Define message that respondent will see for a closed collector.

Email notifications:

Set email notification frequency. Set email notifications for a survey - none, instant, hourly, daily, weekly.

RESPONSE LIMITATIONS

Multiple responses per respondent. Decide if respondent will be able to complete survey only once or multiple times (multiple responses per one survey, useful for kiosk surveys, survey stands or computer labs).

Going back to previous page. Decide if respondent will be able to go back to the previous page of the survey.

Time to complete. Set time allowed to complete a survey.

Collector options

COLLECTOR LIMITS

Total responses limit. Define a maximum allowed number of responses for a survey.

Survey available until. Define maximum allowed time of survey.

SECURITY OPTIONS

SSL secured. Encrypt surveys with <u>SSL / HTTPS</u> (Secure Socket Layer).

Password secured. Secure survey access with a password. Same for all respondents

Token secured. Secure survey access with a token. Different for each respondent.

IP Filter. Limit or allow access to a survey for selected IP addresses.

INTEGRATION SETTINGS
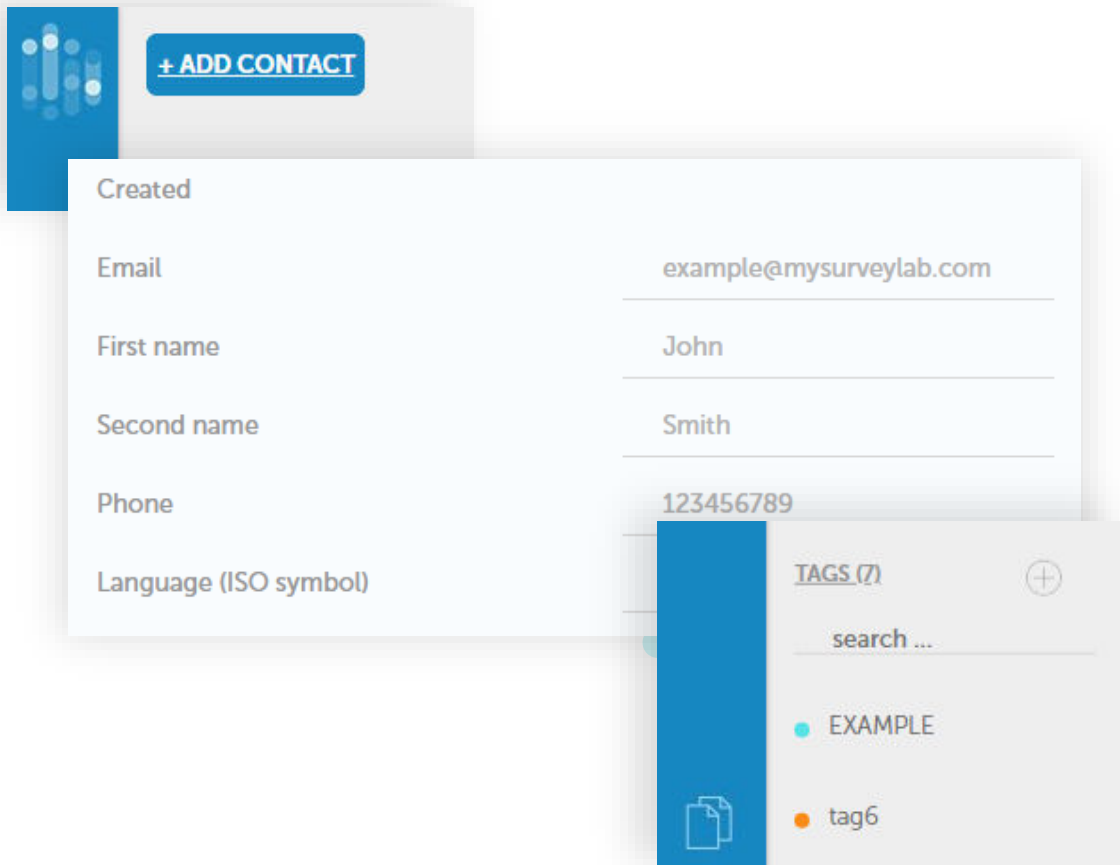
Response ID. Allows external application (for example CRM, eShop, Portal) to manage the way survey responses are collected.

Manage Contacts: Add Contacts

Contacts allow you to track responses for each survey. In the Contacts module, you can group, add, delete or edit contacts.

To add a new contact:

1. Click on **+ ADD CONTACT** button or use **Import contacts** button to bulk contacts upload
2. Fill in the textboxes with information you need
3. Select groups (tags) to which contacts will be added

Add contacts to the group - to add contacts to the group please select the right tag from list on the left and drag and drop it to the needed contact.

Search contacts - you can search your contacts using the search field. Just enter a search phrase and then press ENTER.

Manage Contacts: Delete Contacts

To delete contacts:

1. Select contacts you want to delete
2. Click on **DELETE** button
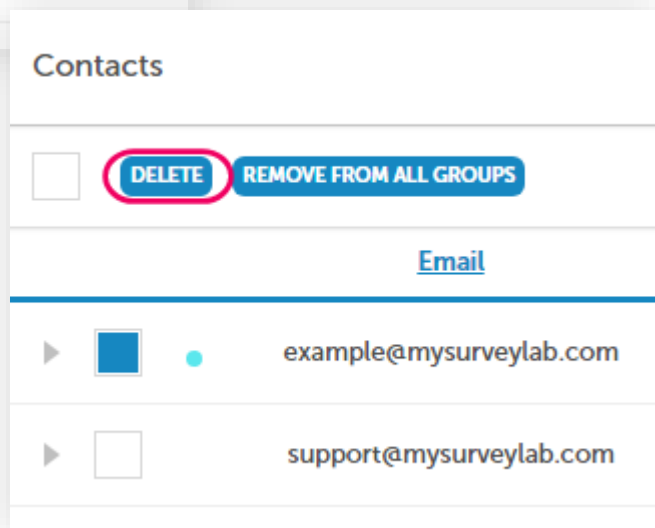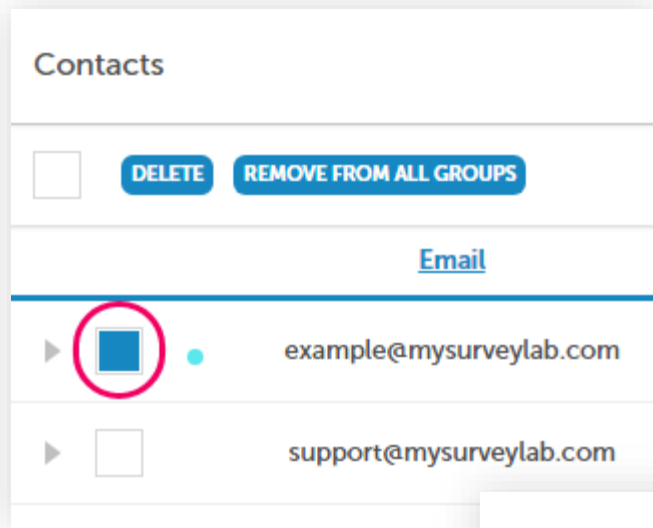
Manage Contacts: Import Contacts

This feature will allow you to import contacts from a text file. **Import contacts** option is available on the left side menu. You have two options while importing contacts.

OPTION 1. Import Contacts (From a File)

To import contacts :

1. Select **Import contacts**
2. Select character separator, code page and file to be inported.
3. Press **PREVIEW** and then **IMPORT** button.

Manage Contacts: Import Contacts

OPTION 2. Import Contacts (Text Area)

This feature allows you to copy - paste list of addresses directly into the system.

To import contacts:

1. Select **Import contacts**
2. Select **Paste Import method**
3. Select character separator and groups
4. Use text area to paste contacts. You can do copy - paste from a text file.
5. Press **PREVIEW** and then **IMPORT** button.

Import contacts

Export contacts

Translat

Column

?

Contacts

GENERAL SETTINGS

Field separator   ;

Overwrite if contact exist   ⬤

Import method   paste   ▼
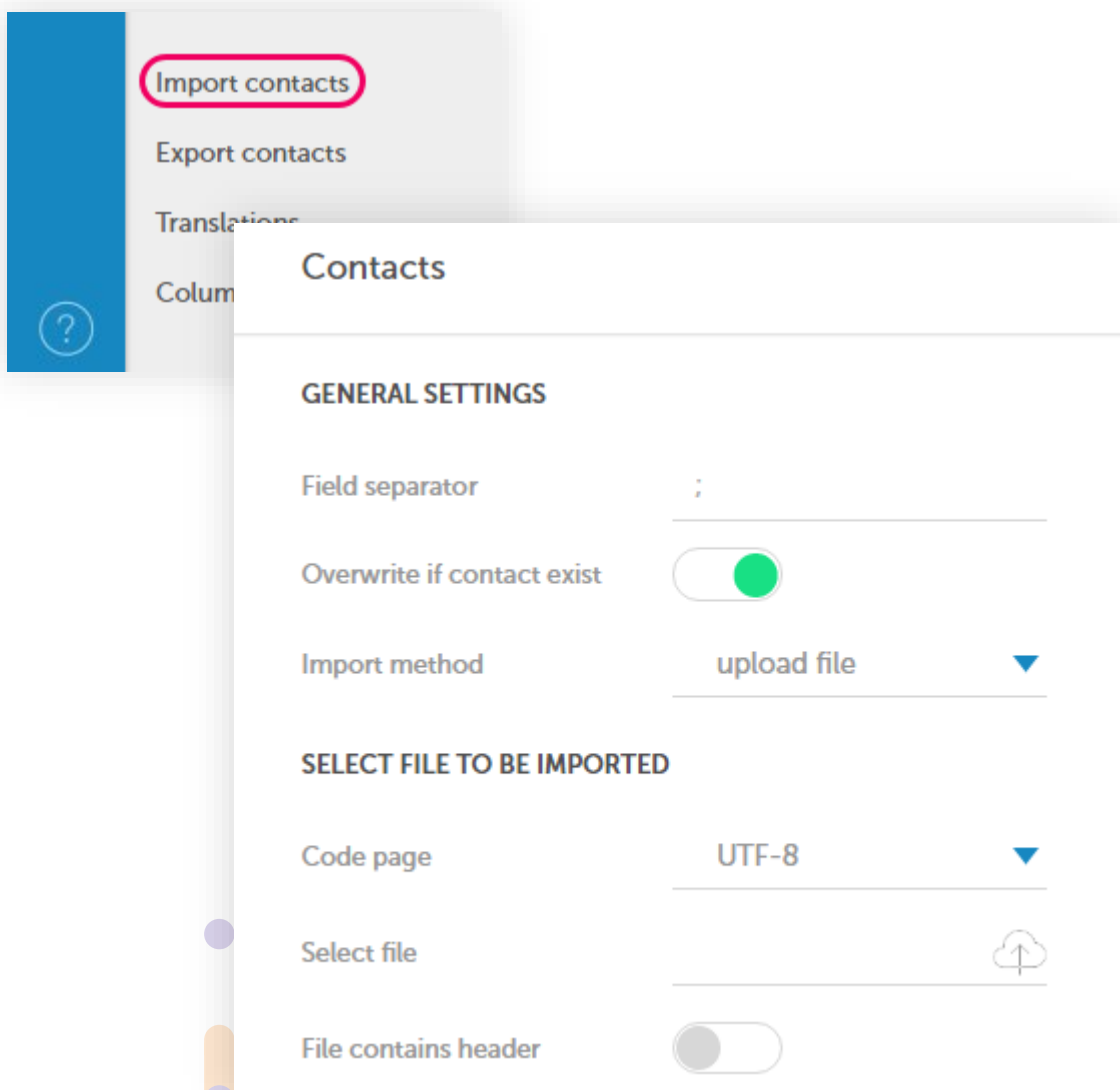
PASTE OR ENTER CONTACTS

Paste contacts (with

separator)

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Manage Contacts: Export Contacts

This feature will allow you to export all contacts to a text file. Option is available on the left side menu.

To export contacts:

1. Press **Export contacts**
2. Select groups of contacts to be exported. To export, all contacts select **All TAGS**.
3. Select field separator.
4. Select fields to be exported
5. Click on **Export** button
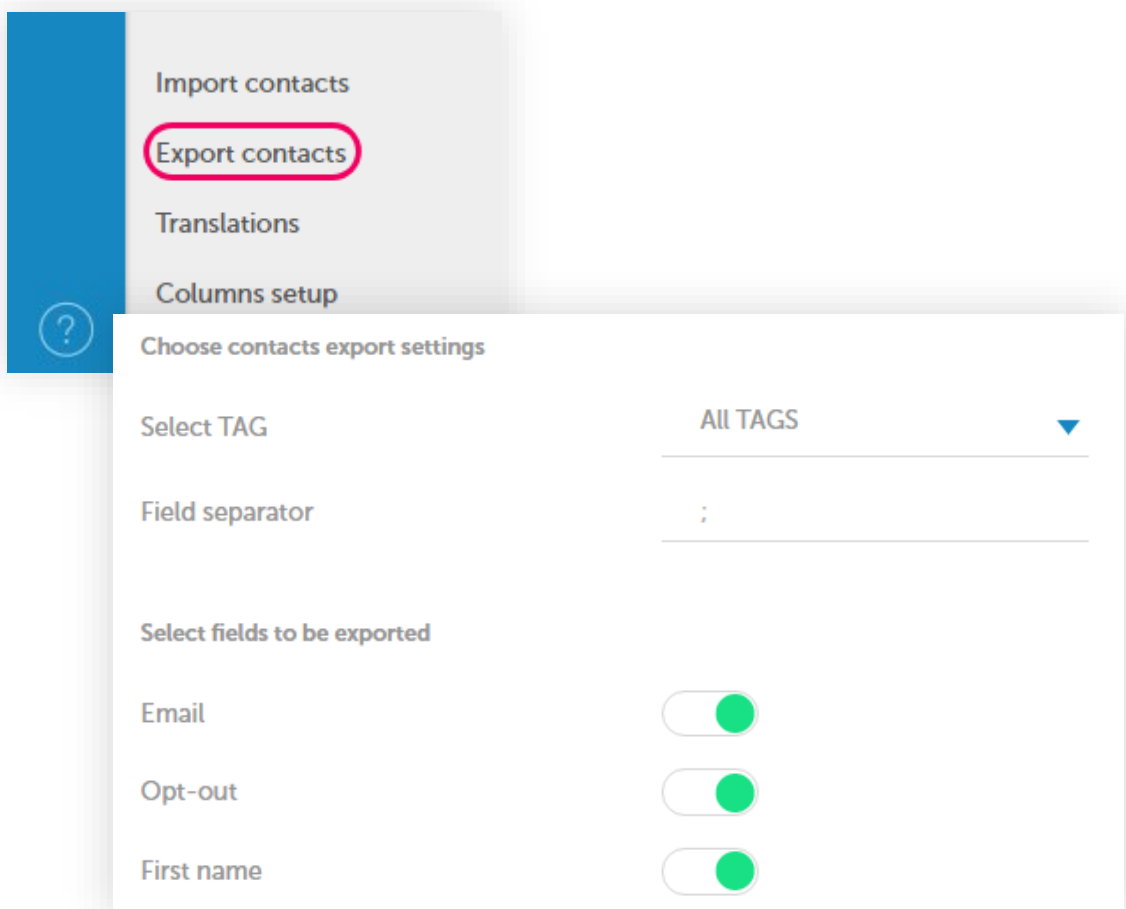
Reports

Reports allow you to analyze collected data. System automatically generates report with survey results, and by using advanced features like filters you will be able to analyze correlations and cause-effect dependencies.

GRAPHICAL REPORTS
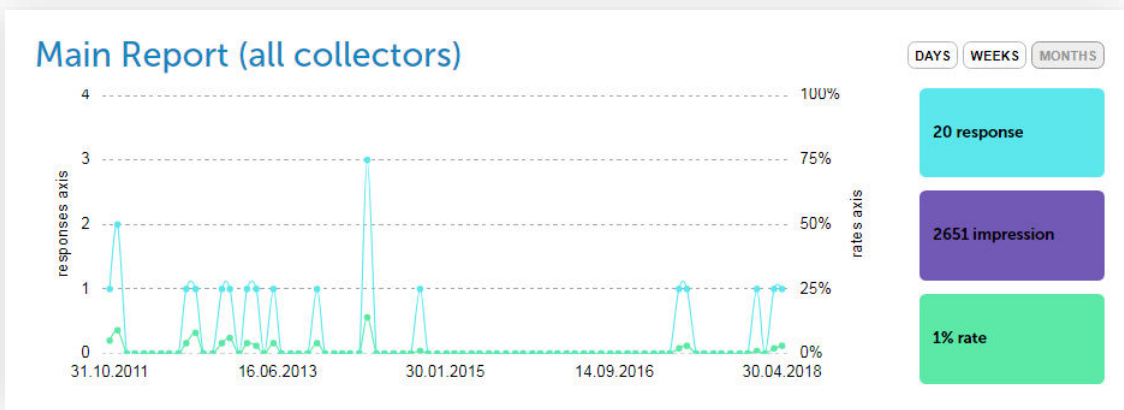
To open a report and start data analysis:

1. Press **Report** button
2. You will see a **Summary report** with aggregated data for your survey. To view individual responses go to **List of responses**.
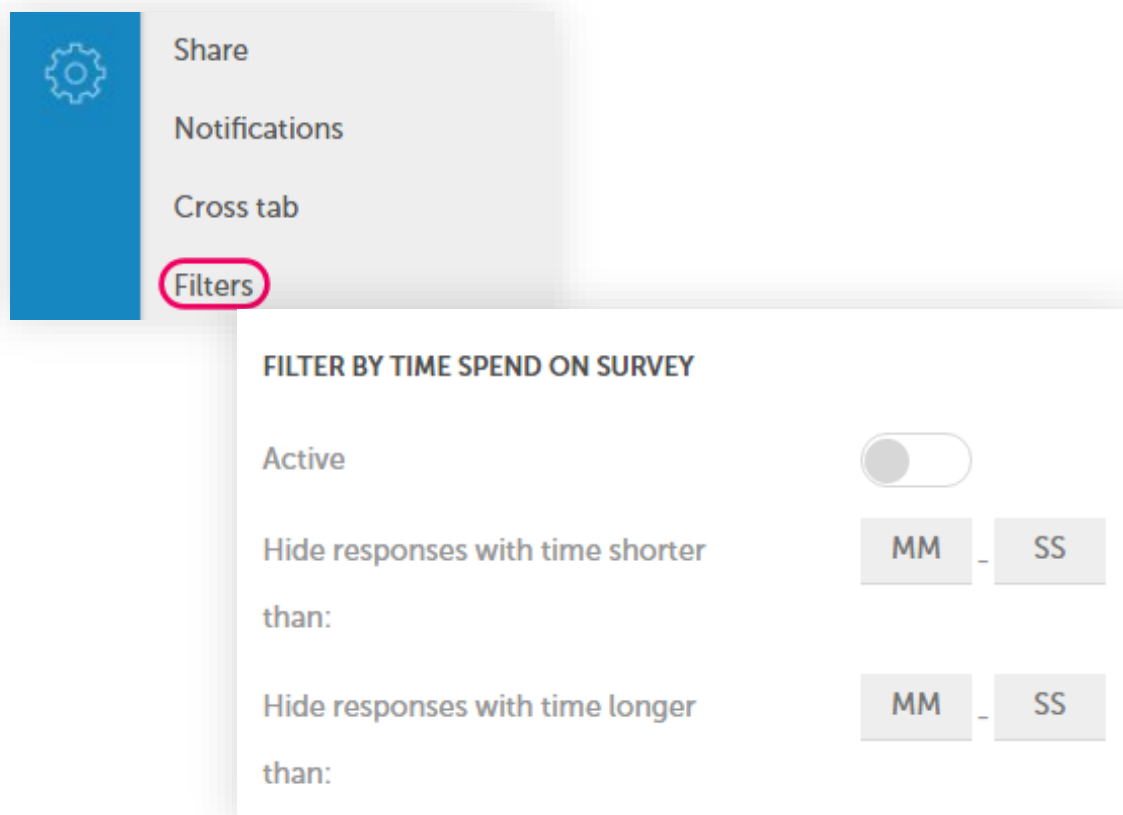
NOTE. On response details, you will see all answer choices, including those that were not chosen by respondent. Selected answer choices are marked.

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Reports: Filters

This functionality allows to filter collected data by any parameter. Thanks to filters you can easily check how certain group of respondents answered for survey questions, for example women, age 20 - 30.

To add filter:

1. Create report copy, to do it click on **Copy report** button

2. Click on **Filter** button

3. Select collectors, that you want to include in a filter results, and click on **Add** button to add filter

Share

Notifications

Cross tab

Filters

FILTER BY TIME SPEND ON SURVEY

Active

Hide responses with time shorter than: MM _ SS

Hide responses with time longer than: MM _ SS

NOTE. To add report filter you need to create report copy first.

Export Results

Export function is designed for users that use advanced analytical software for data analysis. You can export survey results any time.

You can download data in the following formats:

.csv	Starter	Comma Separated Values. Text file where values are separated with comma or semicolon.
.xls	Standard	MS Excel file.
.xlsx	Standard	MS Excel file.
.por	Standard	SPSS file.
.sav	Standard	SPSS file.
.pptx	Professional	MS PowerPoint file.
.pdf	Professional	PDF.

NOTE. Export files are updated in a real-time or in time intervals that depend on the report size:

- report below 1000 responses - in a real-time
- reports 1001 - 5000 responses - every 3 hours
- reports 5001 - 50000 responses - every 6 hours
- reports over 50001 responses - every 24 hours

Export Results

In order to export survey results :

1. Click on **Export** button
2. Choose the needed format of the exported report

Summary report

PPTX	XLSX	PDF

Detailed report

Export date : 05-29-2018 14:54

CSV	XLS	XLSX
SAV	POR	

NOTE. Each zip exported from SurveyLab contain <u>flatten</u> file, it means that the file doesn't contain ENTER characters which may cause problems with proper data import into MS Excel or SPSS.

Cross tab reports

SurveyLab provides correlation analysis and crosstab reports analysis with multiple variables.

To create crosstab reports:

1. Go to survey report
2. Press **Cross tab** button
3. Press **+ ADD CROSS TAB** button
4. Add variables you want to analyze

		Q2. What is your age?						No
		Under 18	18 - 24	25 - 34	35 - 44	45 - 54	Over 54	No
Q7. Would you re...	Definitely yes	4(3%)	5(3%)	3(2%)	5(3%)	1(1%)	1(1%)	19
	Probably yes	0(0%)	6(4%)	8(5%)	5(3%)	3(2%)	1(1%)	23
	Not sure	2(1%)	5(3%)	10(6%)	4(3%)	2(1%)	2(1%)	25
	Probably no	0(0%)	1(1%)	0(0%)	0(0%)	0(0%)	1(1%)	2
	Definitely no	2(1%)	2(1%)	1(1%)	0(0%)	1(1%)	0(0%)	6
	No	8	19	22	14	7	5	

You can add only single and multiple choice questions to the crosstab report. From the analytical point of view, it doesn't matter how you will arrange variables (rows, columns)
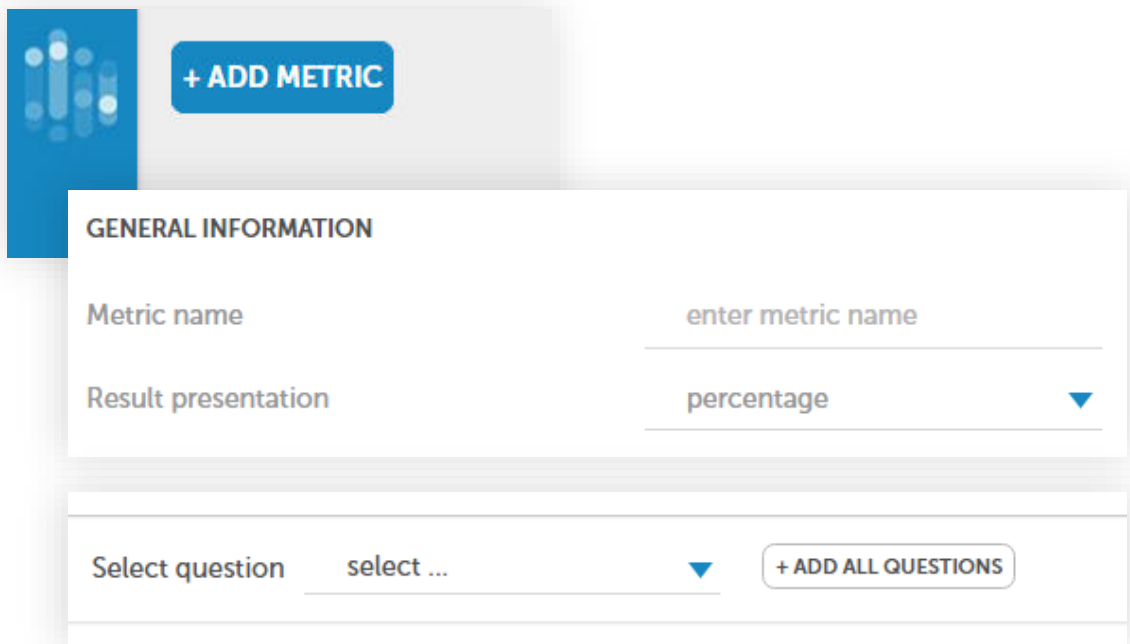
NOTE. To create cross tab report you need to add at least one variable in a row and one in a column.

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Metrics

Metrics allow you to create complex indicators like CSI (Customer Satisfaction Index), that consist of multiple questions with different weigh and for online test creation.

To add new metric:

1. Press **Metrics** button
2. Press **+ ADD METRIC** button
3. Enter a metric name and data presentation format (percent or points)
4. Add a question or select **+ ADD ALL QUESTIONS**
5. Metric will be saved automatically

How points and percentage works :

Points - system will automatically sum up number of points achieved by respondent

Percentage - the system will automatically sum up number of points achieved by respondent and divide it by maximum number of points that can be achieved and present it as a percentage

NOTE. Metrics are based on points for answer choices. To use this functionality you need to add points for each answer choice.

Acount settings

You can change your account settings any time. Changes are saved automatically.

USER INFORMATION

Change your name, last name and email address.

BILLING INFORMATION

Change your billing information. This information will be used on your invoices.

SYSTEM SETTINGS

Change your working language, time zone, and data format. It is important to set the correct time zone, because it will have an impact on survey finish date / time if selected.

You can select between three different date formats DD-MM-YYYY, MM-DD-YYYY, YYYY-MM-DD, where DD is day, MM - month, and YYYY - year.
Set code pages for export. Default code page is UFT-8 (Unicode)

NEWSLETTER

Change newsletter settings. Subscribe or unsubscribe to news and tips from surveylab.com.

NOTE. Billing information is needed only if you require an invoice for the purchased services.

Integrations

You can integrate mysurveylab.com with any tool or software. Youu can use integrations with Slack, Zendesk, Google Analytics or Dropbox.

To create integration with any of these tools:

1. Click on **Account** button, and then go to **Integrations**
2. Change integration settings
3. Changes will be saved automatically

You can create such integrations:

- Zendesk integration
- Slack integration
- Google analytics integration
- Dropbox integration
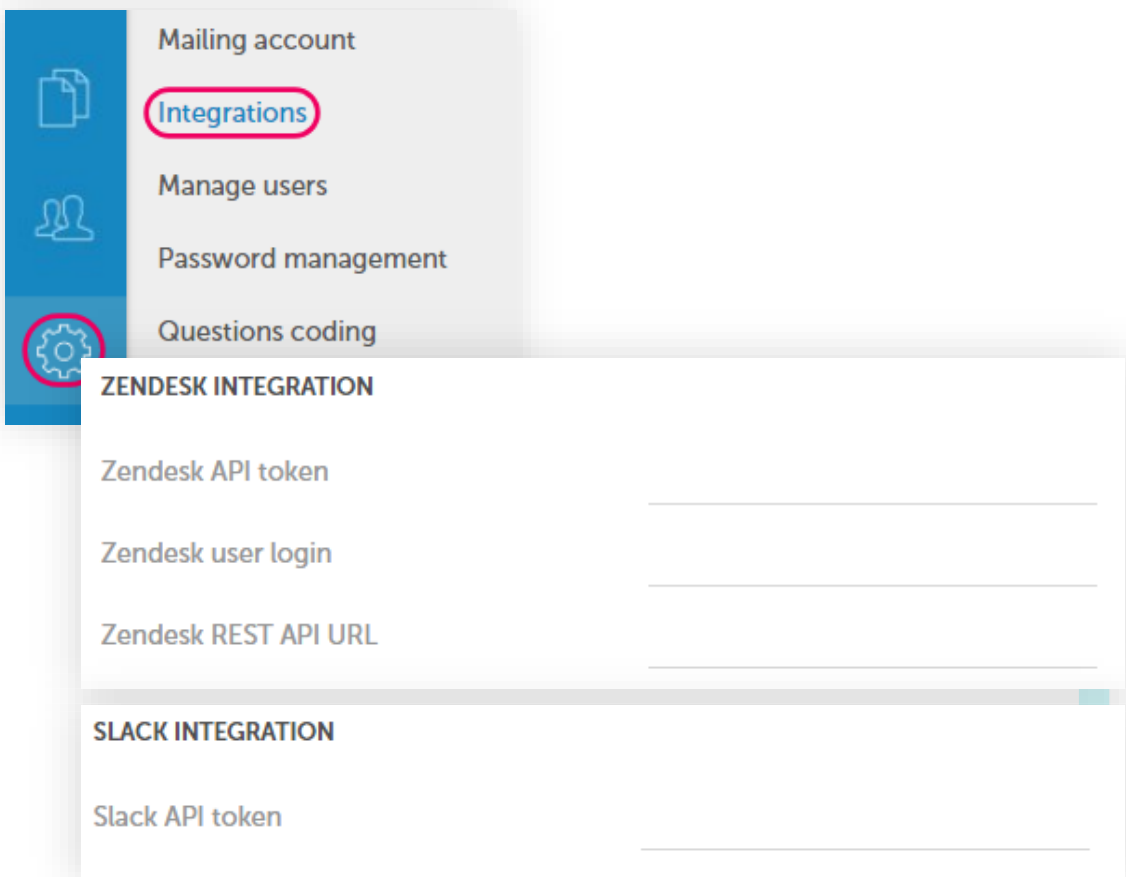
Upgrade

You can upgrade or downgrade your account anytime.

You can choose from 4 subscription plans (Standard, Standard Plus, Professional, Enterprise) or compose your own plan by selecting features you need.

Sign up in mysurveylab.com is available for free. We will never delete your surveys or responses.

To buy a subscription:

1. Sign up for a free account
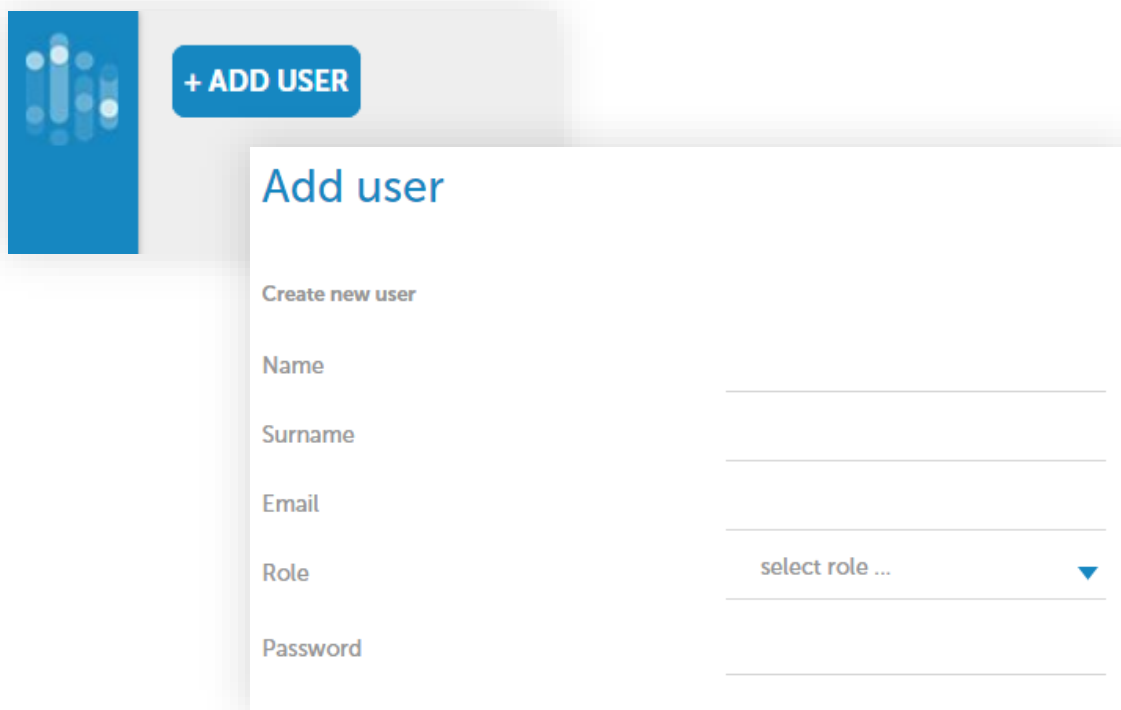
2. Sign into your account and click on **UPGRADE** button

3. Select one of our subscription plans
   (Starter, Standard, Professional, Enterprise) or create your own plan

4. Confirm invoice data and select payment method. You can pay by Credit Card, PayPal or direct money transfer (option for Polish banks only)

5. Click on **CONTINUE TO PAYMENT** button to complete your payment

Groupwork (Multi-user)

With SurveyLab you can work in a team on your surveys and tests. Moreover, you can decide who can do what in a system by granting account users with different roles and access rights. Each user will have its own login and role.

To create a new account :

1. Go to **Account** and then **Manage users**
2. Click on + **ADD USER** button
3. Enter new user data and press Save button

Groupwork (Multi-user)

To manage account settings:

1. Click on **Access** button to manage access to surveys
2. Click on **Role** button to edit user data and role
3. Click on **Delete** button to delete user

Available user roles :

	Admin	Manager	Editor	Pollster	Viewer
Surveys					
Preview surveys	✔	✔	✔	-	✔
Edit surveys	✔	✔	✔	-	-
Distribute					
Create collector	✔	✔	-	-	-
Take surveys (Mobile app collector)	✔	✔	✔	✔	✔
Analyze					
Preview reports	✔	✔	✔	-	✔
Share and export results	✔	-	-	-	-
Account					
Edit roles and access rights	✔	-	-	-	-

SurveyLab

Online Survey Panel

SurveyLab online survey panel gives you access to over 100 M panellists in 150 countries. Whenever you need targeted audience online survey panel is the easiest way to conduct marketing research. There is no minimum size of the research project, you can conduct both quick research with 100 responses and large project with 10000 responses or more.

Each research project is different. To provide you with the pricing and research timing **we need such information:**

- Number of responses you need to collect
- Survey length (in minutes or number of questions)
- Country
- Any special requirements e.g. age, gender, access to a car, occupation, ...

You always pay only for collected and complete surveys. You don't need to worry about response rate, panellists remuneration or recruitment. We are taking care of it.

WHO IS IT FOR :

- Marketing managers
- Entrepreneurs
- Market researchers
- Research agencies
- Planners

ADVANTAGES :

- Super fast results (3 days or less)
- Superior targeting
- Quality results (proved by ISO 20252 certificate)
- Survey reports available in CSV, MS Excel and SPSS formats

SAMPLING OPTIONS :

- Demographics (country, region, city, gender, age, education, ...)
- Household structure (number of kids, income, ...)
- Occupation (company size, industry, experience, ...)
- Other (glasses, smoke habits, access to the car, animals, ...)

SurveyLab

Mobile App

SurveyLab allows for offline data collection with a mobile app available for Android and iOS.

To use the mobile app :

1. Download app on your mobile phone or tablet
2. Sign into the app using your SurveyLab login / email and password

NOTE. To connect to the mobile app you need to be online, so the app can authenticate you and download surveys from your account. Then you can disconnect and use the app offline.

To add mobile collector:

1. Create new collector
2. In the collector settings select **Mobile app** as a distribution method

NOTE. For one survey you can add one mobile collector.

Mobile app supports following question types:

1. Single / multiple choice
2. Open ended
3. NPS
4. Add photo

Please remember that other question types (e.g. matrix question, drag and drop) will not be displayed in the mobile app.

The application works on Android (4.1) and iOS (9.0) operating systems.