# Surveys Table

This table is used to collect customer feedback for Support or Service Requests, to send surveys on any subject to customers, or to send surveys to suppliers as part of their onboarding or review process.

# Use Case

Surveys to customers are typically generated through a hyperlink in an email to a customer requesting their feedback.



Surveys to suppliers are typically generated from a Supplier Profile record by an Internal Supplier Manager.

When the user clicks on the hyperlink, it will log them into the Knowledgebase as a Guest and take them directly to a Survey record, without giving them access to anything else. As part of the link, the Support Case ID or Service Request ID or Supplier Profile ID and Survey Type may be populated in the Survey record, linking the Survey to the case/supplier profile that generated the email and to the person who completes the survey.

Guidance on how to manually create the hyperlink URL can be found in the Hyperlinks section in the Administrator Manual. Below is a sample hyperlink. This link will log the user into a new Survey record, set the Survey Type to Demo Follow-up, the Text ID field to 4, the Visitor ID field to 35675 and set the Exit URL and Cancel URL using an account with Guest permissions:

Survey recurrence can be set in the Survey Types table. Surveys recur for as long as the linked company is active.

# Automation

- **Create: All Create actions**: Runs on the creation of all Surveys. Depending on the source of the Survey or the Survey Type, it sets the appropriate Submitter. If it is a recurring Survey, it sets the Date of Next Recurrence. If the 'Number of days to complete' value is provided, it also sets the Date Due for the Survey. For Surveys created as part of Supplier Onboarding and for recurring Surveys of any type, it sends an email to the Submitter with a link to respond to the Survey.
- **Edit: All Edit Actions**: Runs on edit of all Surveys. If the status is 'New', it is set to 'In Progress'. If a Supplier Profile related Survey is Submitted, it sends a notification email to the Assigned Supplier Manager for that Supplier Profile.

- **TB: Trigger Recurring Survey**: A filter finds all Surveys where the linked Company is Active and the Date of Next Recurrence is today. A conversion action creates a new recurring Survey and sets the status of the current one to Superseded.
- **TB : Send Survey Reminder Day Before Due Date**: Sends out a reminder mail to the survey responder day before the survey is due, if they haven't completed it yet.

# Ownership

Records in this table are owned by matching the Submitter Login to the Login in the People table.