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# Opmetrix Surveys Guide

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Version 4.13 onwards

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February 2016

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## Overview

Surveys are created in the Surveys tab and can be pushed out to staff based in the field. Surveys can either appear on an outlets task list or can attach to the end of a transaction. Surveys can be set up as optional or compulsory tasks. Dates are defined for surveys such that they are active or inactive.

## Surveys – Opmatrix Administrator

Create and maintain a survey.

**Survey Maintenance** is available on the **Survey Tab** then **Survey Maintenance** to add, edit and delete surveys. Only Opmatrix Administrators have access to this function.

Survey Maintenance ? info

Showing 4 results between 01/01/2016 and 31/01/2016 (This Month)  
 Show Inactive: Yes | Outlet Type: All Outlets

Email Save Export Print

+ Add Survey

Survey Name	Start Date	End Date	Compulsory	In List	In Task List	After Transaction	# Questions	Copy	Edit	Delete
Store Survey	01/12/2014	01/01/2038	No	Yes	Yes	No	7	+	✎	✖
Credit Survey		01/01/2038	No	No	No	Credit	3	+	✎	✖
Misc Survey	03/09/2015	30/09/2020	No	Yes	No	No	14	+	✎	✖

**Add Survey** Select Add Survey to create a new Survey.

**Edit** Select Edit Survey to edit existing Survey

**Delete** Select Delete to delete existing Survey

## Adding a New Survey

To create a new Survey, Select Add Survey from Survey Maintenance.

Once selected, the following steps need to be actioned.

### Name the Survey

Enter the Expiry Date and confirm if Active. The Survey will appear on the tablet only when marked active and until the expiry date.

### Select Survey Settings

#### Add Survey

Switch | x

Survey Details

Survey Name:

Start Date:  End Date:

Survey Settings:

In List  In Task List  Compulsory  One Off

Attach to:

Order  Invoice  Credit  Quote

Payment

In List	Shows in Surveys list on Tablet
In Task List	Shows in In Store Task List
Compulsory	Gives prompt to user if uncompleted. Note: Compulsory Surveys must also be In Task List.
Attach To	The Attach to option allows a Survey to attach to the end of a transaction. This is available for Order, Invoice, Credit and Quote. Note: Payment is PDA option only.
One Off	Once Survey is completed for each targeted Outlet It will be removed from the Outlets task list.

## Add Survey Questions

To add a question to the survey, select **Add Question**

**Add Survey** Switch | x

**Survey Details**

Survey Name:

Start Date:  End Date:

**Survey Settings:**

In List  In Task List  Compulsory  One Off

**Attach to:**

Order  Invoice  Credit  Quote

Payment

**Questions**

+ Add Question

### Question Types

There are 8 different question types available in the Surveys Module.

**Questions**

Question:

Type: Two Answers  Compulsory x

Button 1: Two Answers

Button 2:

+ Add Question

**Targets**

- Input Text
- Input Number
- Single Choice
- Multi Choice
- Rating 1-5
- Instruction
- Photo

**Two Answers** Rep selects one of the two options. Options are entered in Button 1 and Button 2 fields

**Input Text** Rep uses free flow text to enter their answer

**Input Number** Rep uses numeric keypad to enter their answer

**Single Choice** Rep selects one answer from a dropdown list. To

**Multi Choice** Rep selects one or more answers from a dropdown list. To add items to this list use the **+Add** option

**Rating 1-5** Rep selects number of stars to reflect rating out of 5.

**Instruction** Instruction only, no action from rep. Can be used as

a lead in to a group of questions.

**Photo** Take photo's to attach to the survey

## Target Groups/Outlets to Survey

To Target specific Outlets or Groups of Outlets select from the tabs **Add Categories | Outlet | Import**.

Select a group of Outlets from the **Add Categories** Tab, select specific outlets from the **Outlet** Tab or Paste/Type Outlet codes from the **Import** Tab or combine selections from all three.

The screenshot shows the 'Targets' window with '0 Selections' at the top right. The 'Add Categories' tab is highlighted with a red dashed box. Below the tabs, there is a list of categories: Category, Branch, Banner, Region, State, Customer Category 6, Customer Category 7, and Customer Category 8. Each category has a dropdown menu currently set to '\*\*\* ALL \*\*\*'. An '+ Add' button is located to the right of the dropdowns. At the bottom of the window, there are 'Cancel' and 'Save' buttons.

Use dropdown list to select a group of Outlets, select the **+Add** button to add groups to Targets.

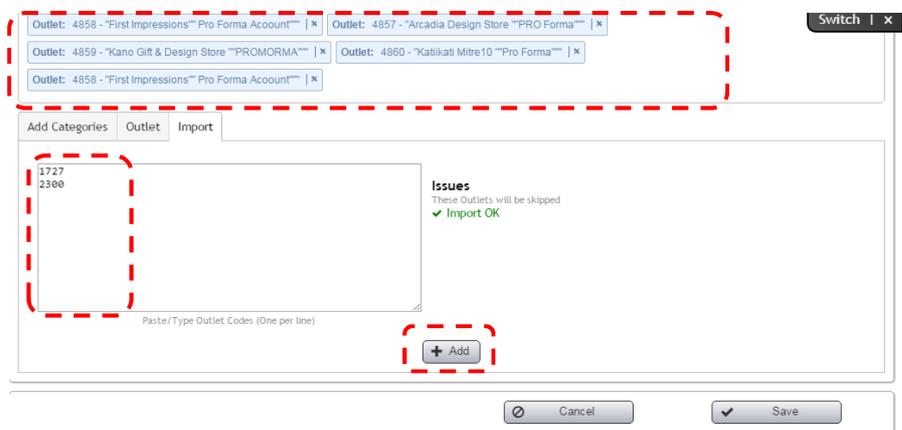
The screenshot shows the 'Targets' window with '3 Selections' at the top right. Three items are listed in the selection area: 'Banner: Foodservice', 'Outlet: 1025 - Bi-Lo Aspley', and 'Outlet: 1028 - Bi-Lo Killaraney Vale'. The 'Add Categories' tab is still selected. The dropdown menus for the categories are still set to '\*\*\* ALL \*\*\*'. The '+ Add' button is visible. At the bottom, there are 'Cancel' and 'Save' buttons.

Targeted Outlets from the **Outlet Tab** can be added and removed easily, select from dropdown list.



Copy/Paste or Type a list of targeted outlets into the **Import Tab** text box, select the **+Add** button to add to targets.

Using the **Outlet Quicklinks** report (for a complete list of Outlets) or other reports used to analyse and target Outlets from the **Reports** tab, you can export to excel e.g. filter bottom 100 Outlets, copy/paste selected outlet codes into the text box.



## Edit a Survey

To edit a survey prior to activating select **Edit** from the **Maintain Surveys** screen.

Once a Survey is active, survey questions **should never** be edited as the reporting integrity is compromised.

There is an option to re-order the sequence of a Surveys questions if the flow of questions needs to be re-sequenced.

To re-sequence use the up down arrows beside question detail.

The screenshot shows a form for editing a survey question. The question text is "Does all shelf stock have new packaging?". The type is set to "Two Answers" and it is marked as "Compulsory". The buttons are labeled "Yes" and "No". On the left side of the form, there are up and down arrow icons, which are highlighted by a red dashed box to indicate they are used for re-sequencing questions.

## Delete a Survey

We do not recommend deleting surveys as all data collected will also be deleted.

We do recommend making surveys inactive (using survey end date) once they have served their purpose so that the data completed can be used for ongoing analysis

Delete a survey only when the data is of no use whatsoever to the business - select **Delete** from the **Maintain Surveys** screen

Survey Maintenance ? Info

Showing 4 result(s) between 01/06/2014 and 30/06/2014 (This Month)  
 Show Inactive: Yes. Email Save Export Print Show Filters

[+ Add Survey](#)

Survey Name	Active	End Date	Compulsory	In Opmetrix App	In Opmetrix App Task List	After Transaction	# Questions	Edit	Delete
Store Survey	Yes	01/01/2038	Yes	Yes	Yes	No	8		
Credit Survey	Yes	01/01/2038	No	No	No	Credit	3		

## Surveys – Mobile User

Survey questions can include:

- Two Choice Answers
- Input Text
- Input Number
- Single Choice
- Multiple Choice
- Rating 1-5
- Instruction
- Photo

Once all answers have been completed, tap finish

The screenshot shows a mobile survey interface for 'Countdown Greenlane'. The survey is titled 'Store Survey' and contains seven questions:

1. What kind of Point of Sale for our products is in store? (External Signage)
2. Does all shelf stock have new packaging? (Yes/No)
3. What is the purchase store Grade? (B - 100K to 200K)
4. What Competitor Lines are in Store (Crunchy Crisps)
5. Rate overall presence in store (4 stars)

Question 6 is an open-ended text question: 'Enter any comments or followup' with the answer 'Met 28th June'. Question 7 is a photo question: 'Take a photo current stock on shelf' with a photo of a blue and white striped bird in a cup.

The interface includes a 'Finish' button (highlighted with a red dashed box) and an 'Action Menu' at the bottom left. The Opmatrix logo is in the top left, and the store name 'Countdown Greenlane' is in the top right. The status bar at the top shows 'Voda NZ', '11:49 am', and '14%' battery.

©2014 Opmatrix Ltd - v4.2 - Application installed

## Survey – Reporting

There are five reports available within the Surveys Tab.

Survey Analysis reports can be printed, emailed, and included in portfolios in most cases.

- Survey Audit Log
- Survey Overview
- Survey Photo Gallery
- Survey Export
- Survey Task Completion

### Survey Audit Log

This report shows all Survey results synchronized from the field

Note: To optimize reporting, use **Reports-Specific Options** and Survey Name drop down to choose correct survey for analysis and file export if needed.

## Survey Overview

This report shows the consolidated summary for all active surveys.

Survey	Questions in Survey	Outlets Audited	Analysis
Store Survey	8	30	Analysis
Credit Survey	3	12	Analysis

## Survey Photo Gallery

This report shows all photos captured from Surveys.

## Survey Export

This report allows Survey Results to be exported to excel with Report-Specific options that include individual answers to questions.

## Survey Task Completion

This report shows task completion by Survey

Code	Name	Outlets Targeted	Outlets Audited	Outlets Not Audited	%
18	Credit Survey	197	0	197	0%
41	Oliver Test	27	0	27	0%
17	Store Survey	197	0	197	0%
40	abcd Survey	197	1	196	0.5%