

X-Survey add-on module for X-Cart 4.3.0

User Manual



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X-Survey add-on module

for X-Cart 4.3.0

User Manual

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This User Manual is intended for X-Survey add-on module for X-Cart v. 4.3.0. It covers most of the areas of the add-on module's installation and use and is applicable for both X-Cart GOLD and X-Cart PRO versions.

X-Survey add-on module for X-Cart 4.3.0. User manual.

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Thank you for choosing X-Cart software solutions!

1 General Information

X-Survey is a commercial add-on module for X-Cart shopping cart software. It is intended for creation of customer surveys and polls to be conducted among the visitors of an X-Cart-based store in order to obtain customer feedback about the goods provided by the store, the store website usability and design, the quality of service and various other aspects of the store operation.

The key features of X-Survey add-on module include:

- Easy to use online surveys and website polls available either on separate web pages or in X-Cart's menu boxes.
- Wide range of question types (single choice, multiple choice and text fields for open-ended questions).
- Automatic and manual sending of survey invitation e-mails.
- Control over the availability of specific surveys (Surveys can be publicly available, password protected, or available only via a direct link).
- Unlimited questions and answers.
- Detailed survey statistics (Printable version available).
- Multilingual support.

X-Survey add-on module is recommended for any online store that values the opinion of its customers and is looking for ways to improve the quality of service based on the feedback being provided by its customers regarding their shopping experience with the store. You can purchase it at www.x-cart.com.

2 Functionality Overview

X-Survey add-on module is a very flexible survey software solution for X-Cart which can be used to create a variety of surveys and polls with any number of questions and answer options for each question. It is extremely easy to use, allowing even the most non-technically minded user to create, administer and collect the results of on-line surveys.

The range of question types supported by the module is wide enough to meet the needs of most users who will use it to create surveys: X-Survey makes it possible to create questions that respondents will answer by selecting a single answer option, by selecting multiple options, or by providing their own textual answer.

The store administrator controls access of store visitors to specific surveys and decides whether a survey should be available to all visitors of the store website (both registered and unregistered users), just registered users or only a limited group of persons to whom an invitation has been sent with a direct link to the survey page. The survey invitation message is fully customizable and can be mailed to e-mail addresses entered by hand, imported from a CSV file, selected from the profiles of registered customers or borrowed from an existing list of the store's newsletter subscribers. Yet another exciting option for the store administrator is to setup X-Survey in such a way that the application will automatically send survey invitations to the customers who purchased a specific product or placed an order for a specified amount.

Depending on the module settings, surveys can be displayed in X-Cart's menu boxes or on separate pages within your store. A list of surveys available to the customer can be found in the 'Surveys' section of the Customer zone (accessible via the Surveys link in the Special menu box).

A survey is entered into the database after a customer answers some or all of its questions and submits the survey form. Precautions can be taken against multiple responses by same individuals: in addition to the limitation according to which any survey can be completed only once per user session, it is possible to set an IP blocked time period during which re-submitting of a survey from the same IP will be prohibited.

X-Survey gathers statistics on the survey forms being submitted, so the store administrator can easily access the overall statistics on any specific survey as well as statistics on specific survey questions. A printable version of the statistical data of any survey can be easily obtained. It is also possible to view individual survey forms submitted by survey respondents.

3 Installing and Uninstalling X-Survey

Learn to install and uninstall X-Survey:

- [Installing X-Survey](#)
- [Uninstalling X-Survey](#)

3.1 Installing X-Survey

For successful installation and work of the module you need an already installed X-Cart 4.3.0.

The process of installing the module X-Survey is the same for X-Cart Gold and X-Cart Pro.

To install the module, take the following steps:

1. Download the module distributive from the File area. The package you need is contained in the archive file x-survey-x.y.z.tgz, where x, y, z are your X-Cart version numbers.
2. Decompress the distribution package archive to a local directory on your system using your favorite compression program (any archiver with support for TAR files).
3. Upload the resulting files to the server directory where your X-Cart is installed.

Note: Please make sure you keep the directory structure during unpacking and uploading, otherwise some necessary files can be overwritten!

4. Point your browser at the location of your store with the addition of /install-xsurvey.php to launch the Installation Wizard.

For example, if your domain name is www.example.com and your X-Cart-based store is installed in the directory /xcart off your web root, you should enter http://www.example.com/xcart/install-xsurvey.php into your browser address line.

5. Follow the Wizard's instructions to install the add-on module at your site:

a) Step 1: License agreement.

This step provides a Software License Agreement for you to accept and requires you to enter your Auth code.

Please read the Software License Agreement. If you agree to all of the terms of this agreement, select the 'I accept the License Agreement' check box.

Note: By selecting the 'I accept the License Agreement' check box, you are consenting to be bound by this agreement. If you do not agree to the terms of the agreement, do not install the software.

Use the field 'Auth code' to enter your Auth code. Auth code is a special authentication code that protects your X-Cart installation. Such a code was issued to you when you first installed your X-Cart-based store. If you do not remember your Auth code, you can look it up in X-Cart's file

include/install.php or in the 'Summary' section of your store's Admin zone ("Your AUTH code for re-installing skins and installing modules is: XXXXXXXX").

Click the **Next** button.

b) **Step 2: Installing and configuring the module.**

The installation script will create a directory skin1/modules/Survey and copy the module files to that directory. It will also make changes to the database by creating the necessary database tables.

Click Next to proceed.

c) **Step 3: Installation complete.**

This is the final step of X-Survey installation. It notifies you that the module has been successfully installed and provides a link to the administration back-end of the store where you can enable and configure the module.

3.2 Uninstalling X-Survey

To uninstall X-Survey, do the following:

1. Launch the Installation Wizard (Point your browser at the location of your store with the addition of / install-xsurvey.php)
2. At the first step of the Installation Wizard (**Step 1: License agreement**), select the 'Un-install the module' radio button.

Click the **Next** button.

3. The Installation Wizard will remove the module files and deactivate the module (**Step 2: Uninstalling the module**).

Click **Next** to proceed.

4. **Step 3:** Uninstallation complete is the final step of the uninstallation process. It notifies you that the module has been successfully uninstalled.

After uninstalling X-Survey, be sure to remove the module distribution package from your web directory.

4 Using X-Survey

Find out how X-Survey can be activated and configured:

- [Enabling and Configuring X-Survey](#)

Learn about the functionality of the 'Surveys' section of the Administration zone interface:

- ['Surveys' Section Overview](#)

Try creating a survey:

- [Creating a Survey](#)

Read about ways of creating a mailing list for a survey and find out how an existing mailing list can be edited:

- [Managing a Survey's Mailing List](#)

Customize the message that will be sent to the prospective respondents of your surveys inviting them to complete a survey:

- [Customizing the Survey Invitation Message](#)

Find out about ways to distribute survey invitations:

- [Sending Survey Invitations](#)

Learn how you can manage existing surveys:

- [Managing Existing Surveys](#)

Integrate X-Survey with Sales-n-Stats to track completion of surveys by survey respondents:

- [Using X-Survey with Sales-n-Stats](#)

Learn how you can view and manage survey statistics and access individual completed survey forms:

- [Viewing Survey Statistics](#)

4.1 Enabling and Configuring X-Survey

Enabling X-Survey

After X-Survey add-on module is installed, you need to log into the Admin area of your store and enable it:

1. Go to the 'Modules' section of the store's administration back-end (Administration menu->Modules).
2. In the list of modules and add-ons, find the name 'Survey' and select the check box opposite it.

3. Click the **Update** button at the bottom of the list.

When the module is enabled, the following elements are added to the user interface of the Admin zone:

- a) Surveys item in the Management menu;
- b) Survey options section in General settings->Modules options.

Configuring X-Survey

After activation, the add-on module needs to be configured:

1. Go to the section 'General settings->Modules options/Survey options':

| General settings | |
|---|-------------------------------------|
| Survey | |
| Number of respondents to send a survey invitation to in one pass | <input type="text" value="100"/> |
| Sending of survey invitations depends on the creation of user sessions | <input type="checkbox"/> |
| If a user is added to a survey respondents list as a result of a certain event, send the survey invitation to this user immediately | <input type="checkbox"/> |
| IP blocked time period (days) | <input type="text" value="6"/> |
| Display only one survey in the menu boxes column at a time | <input checked="" type="checkbox"/> |
| Delay after an event before the invitation is sent (hours) | <input type="text" value="0"/> |
| Email addresses per page | <input type="text" value="50"/> |
| Completed survey forms per page | <input type="text" value="50"/> |
| <input type="button" value="Save"/> | |

2. Adjust X-Survey options:

- a) Number of respondents to send a survey invitation to in one pass.

If you are planning to conduct surveys on relatively large groups of users and to inform the prospective respondents of new surveys using survey invitations, you should give some thought to how you are going to mass mail your survey invitations without putting too much load on the server. The problem is that the process of sending email invitations usually takes up a considerable amount of server time and resources. A large number of invitations being sent all at once can result in significant server load reducing performance for all users. A possible way of solving the problem

might be to send emails in batches. The option 'Number of respondents to send a survey invitation to in one pass' allows you to adjust the size of batches to be mailed. For example, setting the value of this option to 50 means that whenever the procedure of sending email invitations is launched either from crontab or as a result of creation of a user session, X-Cart's Mail sender will send fifty invitations to the first fifty email addresses from the mailing list and stop. Next time it will send another fifty invitations to the next fifty respondent email addresses. Thus invitations will be sent intermittently in portions of a limited size until the entire queue of email invitations is sent.

b) Sending of survey invitations depends on the creation of user sessions.

This option allows you to define whether sending survey invitations should be triggered by the creation of a user session in the database. When anyone enters the store (and accordingly a user session is created), a portion of email invitations gets sent. If the option is not selected, the store admin can use crontab or other scheduling services to organize sending the survey invitations.

d) If a user is added to a survey respondents list as a result of a certain event, send the survey invitation to this user immediately.

This option determines the way in which email addresses should be handled if added to the mailing list of a survey as a result of a certain event. If the option is disabled, an address simply gets added to the mailing list; if it is enabled, an address gets added to the mailing list and an invitation is sent to it.

f) IP blocked time period (days).

This option allows you to adjust the time period during which a survey respondent is not allowed to complete the survey again from the same IP address. The value of this option should be a whole or fractional number representing the number of days during which re-submitting of a survey from the same IP will be prohibited.

g) Display only one survey in the menu boxes column at a time.

This option should be adjusted if you are intending to use more than one surveys simultaneously. If this option is enabled, a single survey is displayed in the menu boxes column at any one time. If it is disabled, the menu boxes column shows all the surveys that can be displayed according to their current availability status.

h) Delay after an event before the invitation is sent (hours).

This option allows you to distribute load on the server more evenly by adjusting the minimum delay between an event that causes an email address to be added to the mailing list of a survey and the mailing of the corresponding survey invitation. The value of this option should be a number representing the length of the delay in hours. Adjustment of this option leads to that, when the process of mailing of survey invitations is launched, X-Cart's Mail sender sends invitations only to those email addresses that were added to the mailing list no later than the specified amount of time ago. For example, if, according to crontab, mailings of survey invitations are scheduled for 6:00 pm

and 10:00 pm, and you set the option 'Delay after an event before the invitation is sent' to 7 hours, at 6:00 pm invitations will be sent to addresses added before 11:00 am, at 10:00 pm - to addresses added before 3:00 pm. Note that, if the number of addresses added to the mailing list before 11:00 am is greater than the size of the batch determined by the option 'Number of respondents to send a survey invitation to in one pass', at 10:00 pm the Mail sender will first send out the invitations postponed from the 6:00 pm mailing, and then it will continue to mail the invitations meant for the addresses added from 11:00 am to 3:00 pm.

e) Email addresses per page.

This option defines the number of email addresses to be displayed on one page.

f) Completed survey forms per page.

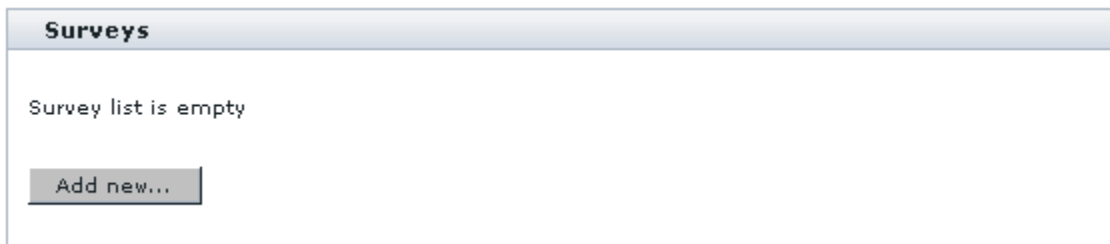
This option defines the number of completed survey forms to be displayed on one page.

3. Click the **Save** button.

After the necessary module options are adjusted, it is time to move on and explore the 'Surveys' section of the administration back-end (Please refer to the chapter ['Surveys' Section Overview](#)).

4.2 'Surveys' Section Overview

Customer surveys can be created and managed using the 'Surveys' section of the administration back-end. You can access it by clicking the link Surveys in the Management menu. The section opens displaying a dialog box titled 'Surveys':



This dialog box is a place from which you will access all the surveys in your store. As long as there are no surveys, the surveys list will be empty. Then, as you create surveys, their names will be added to the surveys list like this:

Surveys

[Check all](#) / [Uncheck all](#)

| | Survey | Invitations | Completed | Recently completed | Status | OrderBy |
|--------------------------|-------------------------------------|---------------------|---------------------|---|----------|---------------------------------|
| <input type="checkbox"/> | Design poll | n/a | 24 | 14-09-2006 03:50:11 | Public | <input type="text" value="10"/> |
| <input type="checkbox"/> | [Unnamed survey #2] | n/a | n/a | n/a | Disabled | <input type="text" value="20"/> |

Note: The first number in the 'Invitations' column shows the number of survey invitations created, the second one (in brackets) - the number of invitations sent.

The surveys list is presented in the form of a table. The table columns provide the following information regarding each of the surveys:

- SURVEY - Survey name. The link allows you to view and edit the survey's details.
- INVITATIONS - Number of survey invitations created and number of invitations sent. The link allows you to edit the survey's mailing list.
- COMPLETED - Number of survey forms submitted by respondents who participated in the survey. The link allows you to access the survey's statistics.
- RECENTLY COMPLETED - Date and time of the most recent completion of the survey. The link allows you to access a list of recently submitted survey forms.
- STATUS - Status of the survey (*Public, Registered only, Hidden, Disabled*).
- ORDERBY - Position of the survey in the surveys list.

The buttons in the lower part of the dialog box allow you to perform various operations on the surveys list:

- create new surveys,
- delete selected surveys,
- change survey statuses and order of the surveys in the surveys list,
- clone existing surveys,
- send survey invitations.

For information on the above listed operations, see the chapters [Creating surveys](#), [Managing Existing Surveys](#) and [Sending Survey Invitations](#).

Please note that the 'Surveys' section menu (at the top of the page) provides quick links to the sections which may be of interest to you as you set up your surveys:

In this section:

- [Surveys](#)
- [Create survey](#)

See also:

- [General settings/Survey options](#)

- Create survey allows you to create a new survey;
- Surveys brings you back to the surveys list;
- General settings/Survey options provides access to the page of X-Survey configuration settings.

4.3 Creating a Survey

Creation of a survey includes 3 easy steps:

1. Adding a new empty survey.
2. Defining the structure of the survey.
3. Defining the survey details.

This chapter provides instructions for completing each of the above steps.

Adding a new empty survey

To add a new empty survey:

1. Go to the 'Surveys' section of the administration back-end (Management menu->Surveys).
2. Do one of the following:
 - Click the button **Add new** at the bottom of the 'Surveys' dialog box.
 - or*
 - Click the link Create survey in the 'Surveys' section menu.

The result of any of these actions is creation of a new empty survey titled [Unnamed survey # N]. [Unnamed survey # N] is a name automatically assigned to the survey by X-Cart. It is probably a good idea to change this name to something more comprehensible, but do not worry about it for now - you will be able to change it at a later time.

Defining the survey structure

After a new empty survey has been added, you need to fill it with questions. You also need to provide possible answers for each of the questions from which the survey respondents will be able to choose or to provide appropriate space where they will be able to write their own answers. Questions and answers can be provided using the 'Structure' section of the survey editing dialog box. Please note that after a new empty survey gets created, the dialog box for survey editing will be opened exactly at the section where you can add questions and answers. Other times you will have to follow the steps described below:

1. In the surveys list, find the survey for which you wish to add questions/answers and click on its name. This opens the dialog box for editing the survey information.

[Unnamed survey #2]: Question

[Structure](#) [Details](#) [Invitations](#) [Statistics](#) [Preview](#) [Inactive](#)

▷ [Go to survey structure](#)

Language:

Question text: *

How you expect respondents to answer the question:

Number of columns in which answers should be displayed:

OrderBy:

Mandatory:

Answer list

| Answer text | Text box | OrderBy |
|----------------------|---------------------------------|------------------------|
| <input type="text"/> | <input type="text" value="No"/> | <input type="text"/> + |

2. Click the link [Structure](#) at the top of the dialog box. This opens the 'Structure' section of the dialog.

[Unnamed survey #2]: Survey structure

[Structure](#) [Details](#) [Invitations](#) [Statistics](#) [Preview](#) [Inactive](#)

[Unnamed survey #2]

| OrderBy | Columns | Mandatory | Question |
|-------------------------------|---------|-----------|----------|
| Survey question list is empty | | | |

[Add new question...](#)

[Next](#)

3. Click the **Add new question...** button. This opens the section where you can add questions and answers.

[Unnamed survey #2]: Question

[Structure](#) [Details](#) [Invitations](#) [Statistics](#) [Preview](#) [Inactive](#)

▷ [Go to survey structure](#) Language:

Question text: *

How you expect respondents to answer the question:

Number of columns in which answers should be displayed:

OrderBy:

Mandatory:

Answer list

| Answer text | Text box | OrderBy |
|--|---------------------------------|---|
| <input style="width: 95%;" type="text"/> | <input type="text" value="No"/> | <input style="width: 30px;" type="text"/> + |

4. From the 'Language' drop-down box, select the language in which you will add survey questions and answers.

5. Add the desired number of questions providing a list of answers for each of them.

To add a question with answers:

a) Into the field 'Question text', enter the question.

b) Use the drop-down box 'How you expect respondents to answer the question' to specify whether the respondents will be supposed to answer the question by selecting a single option, selecting one or more options, or providing their own textual answer.

c) (*Optional*) Into the field 'Number of columns in which answers should be displayed', enter the desired number of columns.

d) (*Optional*) Use the field 'OrderBy' to specify the position of the question in the survey questionnaire.

e) (*Optional*) Use the field 'Mandatory' to select whether this question should be mandatory for

respondents or not.

- f) If the nature of your question presupposes that respondents will be supposed to choose their answer (s) from a list of options, compose the options to be put on the answer list for the question. In the ' Answer list' section, click on the [+] icon to add as many empty rows as the number of answer options you are going to provide; for each option, type the option description into the ANSWER TEXT field, specify whether or not this option should include a text box by adjusting the TEXT BOX field and, if necessary, specify the position of the option in the answer list using the ORDERBY field.

A text box provides a means to include a blank space as part of an answer option so survey respondents can use it to type in their own answers. For example, if the question is 'What do you think the Main page background color should be?', and you wish to set up the answer list for it like this:

- Green
- Blue
- Red
- Other color (please specify):_____ ,

the options 'Green', 'Blue' and 'Red' should be created by entering *Green*, *Blue* and *Red* as ANSWER TEXT and setting the value of the TEXT BOX field to *No*, while the option 'Other color (please specify):_____' should be created by entering *Other color (please specify):* into the field ANSWER TEXT and selecting *Yes* from the TEXT BOX field:

[Unnamed survey #2]: Question

[Structure](#) [Details](#) [Invitations](#) [Statistics](#) [Preview](#) [Inactive](#)

▶ [Go to survey structure](#) Language: English ▼

Question text: *

How you expect respondents to answer the question: Select a single option ▼

Number of columns in which answers should be displayed:

OrderBy:

Mandatory: No ▼

Answer list

| Answer text | Text box | OrderBy |
|---|---|---|
| <input style="width: 95%;" type="text" value="Green"/> | No ▼ | <input style="width: 40px;" type="text"/> + |
| <input style="width: 95%;" type="text" value="Blue"/> | No ▼ | <input style="width: 40px;" type="text"/> + - |
| <input style="width: 95%;" type="text" value="Red"/> | No ▼ | <input style="width: 40px;" type="text"/> + - |
| <input style="width: 95%;" type="text" value="Other color (please specify)"/> | No ▼ | <input style="width: 40px;" type="text"/> + - |

Apply

g) Click the **Apply** button.

h) If necessary, create translations of the survey content into other languages (Use the 'Language' drop-down box to select a language, then replace the existing field values by values in the selected language and click **Apply**).

The question gets added to the survey's list of questions (You can view it at any time in the 'Structure' section of the survey editing dialog box).

[Unnamed survey #2]: Survey structure
[Structure](#) [Details](#) [Invitations](#) [Statistics](#) [Preview](#) [Inactive](#)

[Unnamed survey #2]

| | OrderBy | Columns | Mandatory | Question |
|--------------------------|---------------------------------|--------------------------------|---------------------------------|--|
| <input type="checkbox"/> | <input type="text" value="10"/> | <input type="text" value="1"/> | <input type="text" value="No"/> | <u>What do you think the main page background color should be?</u> <input type="radio"/> Green <input type="radio"/> Blue <input type="radio"/> Red <input type="radio"/> Other color (please specify) |

Defining the survey details

After you have created a survey and composed some questions for it, you might want to provide some essential information as to the survey's availability, design and distribution - the survey details. This can be done using the 'Details' section of the survey editing dialog box (accessible by clicking the link [Details](#) at the top of the dialog box).

[Unnamed survey #2]: Survey details

[Structure](#) [Details](#) [Invitations](#) [Statistics](#) [Preview](#) [Active](#)

Language: English

Survey details

Survey name: *

Survey availability: Public [Need help?](#)

Survey valid: from April 10 through May 10
2009 2009

OrderBy: 20

Allow respondents to see the survey results

Display the survey on the front page in the menu boxes column

Additional options

[+ Survey header](#)

[+ Survey footer](#)

[+ Survey completed message](#)

Update

Next Finish

The 'Details' section includes two major subsections: 'Survey details' and 'Additional options'.

In the 'Survey details' subsection, you need to complete the following fields:

- Survey name - Name of the survey.
- Survey type - Type of the survey characterizing it from the point of view of availability and distribution:
 - Public* - Available to all visitors of the store website.
 - Registered only* - Available to registered users who are logged in.

Hidden - Hidden from general use (No links to the survey are provided on the shop website, the survey is accessible only via a direct URL or can be activated by events).

Disabled - Inactive.

It is recommended you first set the survey type to *Disabled* and keep it that way up until the moment the survey is fully prepared for publishing.

- Survey valid from [*Date1*] through [*Date2*] - Period during which the survey needs to be conducted.
- OrderBy - Position of the survey in the surveys list.

In addition to that, you need to define whether the survey results should be made available to the respondent after the survey form is submitted (the checkbox 'Allow respondents to see the survey results') and whether the survey should be displayed in the menu boxes column or just in the surveys list on the special 'Surveys' page (the checkbox 'Display the survey on the front page in the menu boxes column').

In the 'Additional options' subsection, you can adjust the survey's header and footer and create a message that will be displayed to the survey respondent after he or she completes and successfully submits the survey form.

If the survey needs to exist in more than one languages, be sure to provide a survey name, a header, a footer and a survey completed message for it in each of the languages (Use the 'Languages' drop-down box to switch between the languages).

As soon as the survey structure and details are defined, the survey is almost ready for publishing; however, before making the survey available to your clients, it is a good idea to make sure the survey looks and functions correctly. The [Preview](#) link at the top of the survey editing dialog box allows you to view your survey as if you were its respondent.

Your further actions depend on how you wish to distribute your survey. If you are going to invite respondents for the survey by email, you now need to configure the survey's mailing list - to provide X-Cart with a list of email addresses to which invitations will be sent or to configure X-Cart to create a mailing list automatically (Instructions for creating a mailing list are available in the chapter [Managing a Survey's Mailing List](#) of this user manual). If, however, you do not wish to send out any survey invitations by email, all you need to do is just activate the survey by assigning to it a proper availability status. The current status of the survey can be easily checked and corrected using a link in the upper right-hand corner of the survey editing dialog box (next to [Preview](#)):

- [Inactive](#) means that the survey is disabled (which happens to surveys whose survey type is *Disabled* or whose validity period has expired or has not begun yet);
- [Active](#) means that the survey is enabled (which corresponds to the survey types *Public*, *Registered*

only or Hidden);

- Warnings means that the survey is enabled, but misconfigured (for example, contains questions without answers).

After a survey has been created and configured, you can edit, clone or delete it. Refer to the chapter [Managing Existing Surveys](#) for information on survey operations.

4.4 Managing a Survey's Mailing List

Mailing list is a list of email addresses to which X-Cart will send invitations for a particular survey. A mailing list needs to be configured only for those surveys for which you wish to send invitations.

This chapter explains how a mailing list can be created and edited.

After the mailing list for a survey is configured, you will be able to send invitations to addresses contained in it. For details on sending survey invitations, read the chapter [Sending Survey Invitations](#). Information on customizing the message that is sent by email as a survey invitation is available in the chapter [Customizing the Survey Invitation Message](#).

Creating a mailing list

A survey's mailing list can be configured using the 'Invitations' section of the survey editing dialog box (accessible via the link [Invitations](#)). All you need to do is add some email addresses so they are listed in the 'Mailing list for invitations' subsection. Email addresses can be added manually or automatically.

Adding respondents to a survey's mailing list manually

Open the 'Manual invitations' subsection by clicking the [Manual invitations](#) tab.

[Unnamed survey #2]: Invitations

[Structure](#) [Details](#) **[Invitations](#)** [Statistics](#) [Preview](#) [Inactive](#)

Mailing list for invitations

Mailing list for invitations is empty

[Automatic invitations](#) **Manual invitations**

Choose how you wish to add respondents:

Add respondent addresses manually

Select respondents from registered users

Acquire respondent addresses from a list of news subscribers

Copy respondents from another survey

Import respondent addresses from a file

Add respondent addresses manually

E-mail:

Choose how you wish to add respondent addresses to the mailing list and select the respective radio button. Depending on your selection, use the controls of the subsection displayed at the bottom of the 'Invitations' section to add email addresses:

- *Add respondent addresses manually*

This method is convenient when the number of addresses that need to be added is relatively small. You can add an email address by typing or pasting it into the 'E-Mail' field and clicking the **Add** button. It is possible to add more than one addresses at a time: add multiple rows for email addresses using the **[+]** icon and enter an email address into each of the 'E-Mail' fields, then click **Add**.

- *Select respondents from registered users*

This method allows you to add the email addresses of some or all of your store's registered users to the mailing list of a survey. Clicking the button **Search for users** produces a new window with the standard

X-Cart's user search form. You can use this form to add email addresses of the store's existing users to the mailing list: just do a search and save the users whose addresses need to be added:

- to save only some specific users, select the check boxes next to their names and click the button

Save selected;

- to save the whole list of search results, simply click **Save all**.

The addresses of the selected users should be added to the mailing list at once.

- *Acquire respondent addresses from a list of news subscribers*

This method allows you to add to a survey's mailing list the email addresses from the mailing list of a specific news list (or several news lists). To be able to add email addresses using this method, you need to have at least one news list with a non-empty list of subscribers in your store. All you need to do is select from the 'News lists' selectbox the names of those news lists whose subscribers you wish to take part in the survey and click **Add**. Please be aware that this method adds only the news list subscriber email addresses that exist in the system by the time you click the **Add** button. Any email addresses that get added to the news list subscription after that are not added to the mailing list of the survey automatically.

- *Copy respondents from another survey*

This method allows you to re-use existing survey mailing lists. If you have one or more surveys in your store whose mailing list(s) you would like to re-use, you can copy the addresses contained in these mailing lists to the mailing list of the survey you are currently editing. All you need to do is select from the list of surveys in the 'Surveys' selectbox the names of those surveys whose mailing lists you would like to add and click the **Add** button.

- *Import respondent addresses from a file*

This method allows you to import email addresses from a file. The file needs to be a simple list of email addresses separated by line breaks like this:

```
email1@example.com  
email2@example.com  
email3@example.com
```

Note that, regardless of the method used, before adding any email addresses to the mailing list, X-Cart checks their format and uniqueness. This means that if X-Cart finds the syntax of one or more address entries incorrect or identifies one or more addresses as already contained in the mailing list, it will not add them - you will be notified of the fact and provided with a list of entries that have not been added.

The result of a successful addition of email addresses should be a list of email addresses in the 'Mailing list for invitations' subsection:

[Unnamed survey #2]: Invitations

[Structure](#) [Details](#) **[Invitations](#)** [Statistics](#) [Preview](#) [Inactive](#)

Mailing list for invitations

[Check all](#) / [Uncheck all](#)

| | E-mail | Username | Status |
|--------------------------|--------------------|----------|--------|
| <input type="checkbox"/> | email1@example.com | n/a | queued |
| <input type="checkbox"/> | email2@example.com | n/a | queued |
| <input type="checkbox"/> | email3@example.com | n/a | queued |

Survey invitations will not be sent to respondents who already completed the survey.

Automatic invitations [Manual invitations](#)

Allow X-Cart to add respondent addresses to the mailing list automatically

Defining rules for automatic addition of respondents to a survey's mailing list

If not already open, open the 'Automatic invitations' subsection (Click the [Automatic invitations](#) tab).

[Unnamed survey #2]: Invitations

[Structure](#) [Details](#) **[Invitations](#)** [Statistics](#) [Preview](#) [Inactive](#)

Mailing list for invitations

Mailing list for invitations is empty

Automatic invitations [Manual invitations](#)

Allow X-Cart to add respondent addresses to the mailing list automatically

Select the check box 'Allow X-Cart to add respondent addresses to the mailing list automatically' to enable automatic creation of the mailing list. This should expand the 'Automatic invitations' subsection providing you access to the controls that will help you set the criteria upon which email addresses of store users will be added to the mailing list.

[Unnamed survey #2]: Invitations

[Structure](#) [Details](#) **[Invitations](#)** [Statistics](#) [Preview](#) [Inactive](#)

Mailing list for invitations

Mailing list for invitations is empty

Automatic invitations [Manual invitations](#)

Allow X-Cart to add respondent addresses to the mailing list automatically

Set the criteria for adding respondent addresses to the mailing list:

Event type

Event: Order placed
 Order processed
 Order completed
 Order processed or completed

Event parameters

Event parameters are joined by AND/OR: OR ▼

Order total equals or is greater than

Ordered products

Ordered products from categories

Update

Finish

The subsection 'Event type' allows you to specify the type of event upon which a user's address will be added to the survey's mailing list. At present the list of events upon which an email address can be added looks as follows:

- Order placed
- Order processed
- Order completed

- Order processed or completed

You need to select one of the listed events and configure its parameters using the 'Event parameters' subsection.

Parameters characterize the order whose creation or status change is interpreted as an event. The following parameters can be configured:

- Order total equals or is greater than - Minimum total amount that the order must have.
- Ordered products - Product or products that must be contained in the order.
- Ordered products from categories - Category or categories products from which must be contained in the order.

Two or more parameters can be used in combination. You can define how the parameters need to be joined by adjusting the 'Event parameters are joined by AND/OR' drop-down box.

After you finish configuring the events and parameters, be sure to click the **Update** button to save the changes.

The following examples demonstrate the usage of events and event parameters for configuring automatic addition of respondent addresses to a survey's mailing list:

Example 1:

Selecting the event *Order placed* and adjusting its parameters like this:

Event parameters are joined by AND/OR: *OR*,

Order total equals or is greater than: *\$50.00*,

Ordered products from categories: *Books*,

enables X-Cart to automatically add to the mailing list the email addresses of any customers who place an order with a total amount of \$50.00 or more *or* an order containing at least one product from the category *Books*.

Example 2:

Selecting the event *Order processed or completed* and adjusting its parameters like this:

Event parameters are joined by AND/OR: *AND*,

Order total equals or is greater than: *\$50.00*,

Ordered products from categories: *Books*,

enables X-Cart to automatically add to the mailing list the email addresses of any customers whose order gets the status *Processed* or *Completed*, provided that the order has a total amount of \$50.00 or more *and* contains at least one product from the category *Books*.

Please note that X-Cart automatically collects email addresses for a survey's mailing list only when the survey status is other than *Inactive*.

Editing a mailing list

The only way to edit an existing mailing list consists in removing from it the email addresses that you do not

want to be there. It is possible to remove just some specific addresses or the entire mailing list.

To remove one or more email addresses from a mailing list:

1. In the mailing list, select the check boxes next to the email addresses that need to be removed.
2. Click the **Delete selected** button.

To remove the entire mailing list, click the button **Delete all**.

4.5 Customizing the Survey Invitation Message

At present, the module X-Survey does not allow you to create a separate invitation message for each individual survey. There is just one invitation message that is used universally for all the surveys in the store. There is, however, a dynamic part: the name of the survey in the email subject and the link to the page where the survey can be completed in the email body are changed automatically depending on the survey. You do not need to do anything about the link and the survey name, but you may want to change the message of the invitation itself. This can be done by editing the mail templates for the invitation message. The templates that you may want to edit are the following:

| Plain text mail templates for the invitation | HTML mail templates for the invitation |
|--|--|
| skin1/mail/survey_invitation.tpl | skin1/mail/html/survey_invitation.tpl |
| skin1/mail/mail_header.tpl | skin1/mail/html/mail_header.tpl |
| skin1/mail/signature.tpl | skin1/mail/html/signature.tpl |
| skin1/mail/survey_invitation_subj.tpl | |

The templates can be easily edited using X-Cart built-in template editor (Administration menu->Edit templates).

4.6 Sending Survey Invitations

X-Cart's Mail sender can be induced to send survey invitations in one of the following three ways: by clicking a special button in the administration back-end of your store, by issuing from the command line a command that runs the sending of survey invitations or by connecting the sending of survey invitations to creation of user sessions.

This chapter discusses the named ways of sending email invitations so you can choose a method that best suits your needs.

Please note that, regardless of the method, survey invitations can be sent only for surveys that have a configured mailing list and whose status is other than *Inactive*.

The results of sending survey invitations can be controlled via the STATUS column of specific mailing lists: the status *sent* or *queued* displayed opposite an email address allows you to tell whether an invitation to complete the survey has or has not been sent to that email address; the date and time displayed in the same line after the word *sent* are the date and time when the sending of the invitation took place.

Sending invitations manually

This method is easiest to understand, but it requires significant human involvement every time invitations are sent. Using this method, you can send invitations to all the email addresses listed in the mailing list of a specific survey or several specific surveys, or you can send invitations just to specific respondent email addresses from a certain mailing list.

Sending of survey invitations to the entire mailing list of a specific survey can be easily done from within the survey editing dialog box:

1. Open for editing the survey for which invitations need to be sent.
2. Go to the 'Invitations' section of the survey editing dialog box (the link [Invitations](#)).

[Unnamed survey #2]: Invitations

[Structure](#) [Details](#) **[Invitations](#)** [Statistics](#) [Preview](#) [Inactive](#)

Mailing list for invitations

[Check all](#) / [Uncheck all](#)

| | E-mail | Username | Status |
|--------------------------|--------------------|----------|--------|
| <input type="checkbox"/> | email1@example.com | n/a | queued |
| <input type="checkbox"/> | email2@example.com | n/a | queued |
| <input type="checkbox"/> | email3@example.com | n/a | queued |

Survey invitations will not be sent to respondents who already completed the survey.

Delete selected
Send invitations

Delete all
Send all unsent invitations

Automatic invitations [Manual invitations](#)

Allow X-Cart to add respondent addresses to the mailing list automatically

Update

Finish

3. Click the button **Send all unsent invitations** below the survey's mailing list.

X-Cart's Mail sender will begin sending invitations immediately. Invitations will be sent to all the email addresses in the mailing list except those addresses to which an invitation regarding this survey has been sent before.

Note: When invitations are being sent as described above, an invitation is sent to each email address just once. You can click the button for sending invitations as many times as you like without worrying that some of the survey respondents might get an invitation they have already gotten before.

To send survey invitations just to some specific email addresses, select the check boxes next to the email addresses to which you want the invitations to be sent and click the button **Send invitations**. Invitations will be sent to all the selected email addresses, whether or not any invitations for the current survey have been sent to these addresses before.

Sending of survey invitations can also be performed from the surveys list. There you can select the surveys for which you wish to send invitations and click the **Send invitations** button. X-Cart's Mail sender will send survey invitations to all the email addresses listed in the mailing lists of the selected surveys except those addresses to which an invitation has already been sent.

After the process of sending survey invitations is completed, a confirmation message is displayed in an Information box. If, for some reason, the Mail sender cannot complete the sending of selected invitations, error messages are output onto the screen.

Sending invitations automatically using crontab

As has been mentioned above, sending of survey invitations can be run from the command line. The command for sending survey invitations looks like this:

```
<php_path>/php <xcart_root>/modules/Survey/send_invitations.php survey_id
```

The part `<php_path>/php` must be replaced with the actual PHP interpreter filepath, `survey_id` - with a unique identifier of the survey for which invitations are being sent (numeric value) or `all` (a service word telling the script to send out invitations for all the available surveys). Note that, to be properly interpreted, the word `all` is to be typed in the lower case.

The crontab command, found in Unix and Unix-like operating systems, can be used to schedule the mailings of survey invitations to be executed periodically. If you decide to set up sending of survey invitations as a cron job, it is recommended you adjust the option 'Number of respondents to send a survey invitation to in one pass' in General settings->Modules options/Survey options. You may also find useful the option 'Delay after an event before the invitation is sent (hours)'.

Sending invitations automatically based on user sessions

This method allows you to connect sending of survey invitations to X-Cart's session mechanism. When this method is used, the Mail sender sends out survey invitations every certain number of user sessions. To enable the method and to adjust the number of user sessions, you need to adjust the options 'Sending of survey invitations depends on the creation of user sessions' and 'Run the script that launches execution of periodic tasks once per N user sessions' in General settings->General options. Every time the Mail sender is activated to send survey invitations, it will send the number of emails designated by the option 'Number of respondents to send a survey invitation to in one pass'.

4.7 Managing Existing Surveys

Existing surveys can be easily managed via the surveys list in the 'Surveys' section of the administration back-end (Management menu->Surveys).

Surveys

[Check all](#) / [Uncheck all](#)

| | Survey | Invitations | Completed | Recently completed | Status | OrderBy |
|--------------------------|-------------------------------------|-------------|-----------|------------------------|------------|---------|
| <input type="checkbox"/> | Design poll | n/a | 24 | 14-09-2006 03:50:11 | Public ▼ | 10 |
| <input type="checkbox"/> | [Unnamed survey #2] | n/a | n/a | n/a | Disabled ▼ | 20 |

Note: The first number in the 'Invitations' column shows the number of survey invitations created, the second one (in brackets) - the number of invitations sent.

Deleting surveys

Surveys that you no longer wish to use can be deleted.

To delete one or more surveys:

1. Select the check boxes next to the names of the surveys you wish to delete. Note that you can use the [Check all](#) / [Uncheck all](#) links to select all the surveys on the page.
2. Click the **Delete selected** button.

Changing the statuses and the order of surveys in the list

Each survey in your store will have one of the following statuses: *Public*, *Registered only*, *Hidden*, *Disabled*.

It is possible to change the status of any existing survey at any moment directly from the surveys list.

It is also possible to control the relative positions of the surveys in the surveys list.

To change the statuses and/or order of some or all the surveys:

1. Select the desired statuses from the drop-down boxes opposite the names of the surveys whose status needs to be changed (STATUS column).
2. Readjust the position numbers of the surveys that need to be moved (ORDERBY column).
3. Click the **Update** button.

Editing surveys

Any information pertaining to the structure of a survey, the survey's details or mailing list can be edited.

To edit a survey:

1. Click on the name of the survey you wish to edit.
2. Use the survey editing dialog box to edit the structure, details, mailing list for invitations or (for surveys whose mailing list is formed automatically) events on which customer addresses are added to the mailing list.
3. Save the changes.

Note: Please be aware that editing the survey structure after the survey has already been completed by one or more respondents can mess up the statistical data that has been gathered up to the moment.

Cloning surveys

It is possible to quickly create new surveys on the basis of surveys that already exist in the system using cloning.

To clone one or more surveys:

1. Select the check box next to the name of the survey you wish to clone. Note that you can use the Check all / Uncheck all links to select all the surveys on the page.
2. Click the **Clone selected** button.

The result will be a survey titled '*Name* (CLONE)', where *Name* will be the name of the survey that you copied.

Please note that it is possible to clone more than one surveys at a time.

4.8 Using X-Survey with Sales-n-Stats

Businesses using Sales-n-Stats software for monitoring their X-Cart-based websites may find useful the action file `fillSurveyAction.php` which is supplied with X-Survey distribution and which can be found in the directory `<xcart_root>/modules/Survey` after the installation of X-Survey. This file can be imported into Sales-n-Stats to configure an action that will enable you to track completion of surveys by survey respondents. Sales-n-Stats will be able to provide you with a consistent information summary regarding each submission of a customer survey, including survey name, name of the respondent and time of completion.

4.9 Viewing Survey Statistics

X-Survey add-on module gathers statistics on survey completion and allows you to view the statistical data on surveys of your choice. It is possible to view both the statistics on any specific survey in general and on specific survey questions. You can also view individual survey forms submitted by survey respondents.

Statistical data regarding any specific survey can be found in the 'Statistics' section of the survey editing dialog box when the survey is opened for editing (the link [Statistics](#)):

[Unnamed survey #2]: Survey structure

[Structure](#) [Details](#) [Invitations](#) **[Statistics](#)** [Preview](#) [Active](#)

Survey summary

Survey invitations sent: 0 / 0
 Total number of survey forms submitted: 6
 Number of survey forms fully completed: 6
 First survey form submitted: 18-09-2006 11:04:33
 Last survey form submitted: 18-09-2006 11:15:58

Survey statistics by questions

1. What do you think Main page background color should be?
 Answered by 6 respondent(s) (100% of the respondents who answered the survey)

| | | | |
|--|---|---|--------|
| Green | 3 | <div style="width: 50%; background-color: #ffc107;"></div> | 50% |
| Blue | 0 | <div style="width: 0%; background-color: #17a2b8;"></div> | 0% |
| Red | 1 | <div style="width: 16.67%; background-color: #dc3545;"></div> | 16.67% |
| <u>Other color (please specify)</u> | 2 | <div style="width: 33.33%; background-color: #ffc107;"></div> | 33.33% |

The 'Survey summary' subsection provides general statistical data:

- Survey invitations sent - Number of invitations that were mailed regarding the survey.

- Total number of survey forms submitted - Number of survey forms received from respondents.
- Number of survey forms fully completed - Number of survey forms with 100% of questions answered.
- First survey form submitted - Date and time of the first submission of the survey.
- Last survey form submitted - Date and time of the latest submission of the survey.

The subsection 'Survey statistics by questions' provides a list of questions from the survey with an indication of the number of respondents who answered them. For each question that presupposes a choice of one or more answer options a graph is provided that allows you to see the percentages of respondents who chose this or that specific answer option. For questions that have textual answers there are links allowing you to see the specific textual answers left by different respondents.

Please note that a special filter accessible through the link [Filter survey results](#) can be used to narrow down the list of survey results by readjusting the span of the statistics period:

[Unnamed survey #2]: Survey structure

[Structure](#) [Details](#) [Invitations](#) **[Statistics](#)** [Preview](#) [Active](#)

Survey summary

Survey invitations sent: 0 / 0
 Total number of survey forms submitted: 6
 Number of survey forms fully completed: 6
 First survey form submitted: 18-09-2006 11:04:33
 Last survey form submitted: 18-09-2006 11:15:58

Survey statistics by questions

[Filter survey results](#)

Survey votes for period from August 18 2006 to September 18 2006

[Printable version](#)

1. What do you think Main page background color should be?
 Answered by 6 respondent(s) (100% of the respondents who answered the survey)

| | | | |
|--|---|---|--------|
| Green | 3 | <div style="background-color: #ffc107; height: 15px; width: 50%;"></div> | 50% |
| Blue | 0 | <div style="background-color: #ffc107; height: 15px; width: 0%;"></div> | 0% |
| Red | 1 | <div style="background-color: #ffc107; height: 15px; width: 16.67%;"></div> | 16.67% |
| <u>Other color (please specify)</u> | 2 | <div style="background-color: #ffc107; height: 15px; width: 33.33%;"></div> | 33.33% |

[18-09-2006 11:07:13] Grey

[18-09-2006 11:07:13] Orang

[Display survey forms](#) [Clear statistics](#)

The link [Printable version](#) provides access to the printable version of the page with the survey results.

The link [Clear statistics](#) allows you to clear the existing survey results.

The link [Display survey forms](#) allows you to see a list of individual survey forms submitted by respondents:

[Unnamed survey #2]: Survey votes

[Structure](#) [Details](#) [Invitations](#) **[Statistics](#)** [Preview](#) [Active](#)

[Go to survey statistics](#) >

+ [Filter survey results](#)

6 results found
Displaying: 1 - 6 results

| | Date | Username | IP | Completed | Note |
|--------------------------|---|--------------------------|----------------|-----------|------|
| <input type="checkbox"/> | 18-09-2006 11:15:58 | Anonymous user | 192.168.00.XXX | Yes | - |
| <input type="checkbox"/> | 18-09-2006 11:14:07 | Anonymous user | 192.168.00.XXX | Yes | - |
| <input type="checkbox"/> | 18-09-2006 11:13:29 | Anonymous user | 192.168.00.XXX | Yes | - |
| <input type="checkbox"/> | 18-09-2006 11:12:07 | jane_doe | 192.168.00.XXX | Yes | - |
| <input type="checkbox"/> | 18-09-2006 11:07:13 | Anonymous user | 192.168.00.XXX | Yes | - |
| <input type="checkbox"/> | 18-09-2006 11:04:33 | Anonymous user | 192.168.00.XXX | Yes | - |

Delete selected

The list is presented in the form of a table. The table columns provide the following information regarding each of the survey forms:

- DATE - Date and time of submission of the survey form. The link allows you to view the survey form. In our example, clicking on the date link corresponding to the survey form submitted by the user *jane_doe* would produce the following:

[Unnamed survey #2]: Survey votes

[Structure](#) [Details](#) [Invitations](#) **[Statistics](#)** [Preview](#) [Active](#)

[Go to survey votes list](#) 

Survey vote # 30
Survey submitted: 18-09-2006 11:12:07
Submitted by: [jane_doe](#)
IP address: 192.168.00.XXX

1. What do you think Main page background color should be?

Green
 Blue
 Red
 Other color (please specify)

- USERNAME - Login name of the store user who submitted the survey form (For respondents who are not registered users or not logged in this will be simply *Anonymous user*).
- IP - IP address from which the form was submitted.
- COMPLETED - State of completion of the survey (Yes for fully completed survey forms; *Partially* - for forms where not all of the questions are answered).
- NOTE - Link to the order that caused the respondent to be added to the mailing list of the survey (is provided only for respondents who came to the survey page through a link provided in a survey invitation email and whose addresses were added to the survey's mailing list as a result of an event).

X-Survey add-on module for X-Cart 4.3.0. User manual.

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