

SurveyMonkey connector for Creatio manual

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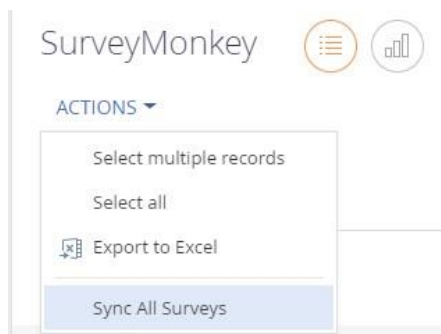
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Initial Setup

1. [Install the SurveyMonkey App from the CREATIO Marketplace](#)
2. Empty cache and hard refresh the browser
3. Once Installed, go to [System Designer] > in the [Import and Integration] area, click [Authenticate SurveyMonkey]
4. Enter your SurveyMonkey username and password. Sign In.
5. You should now be redirected back to Creatio. If successful, you should receive a success notification.

Synchronisation

- SurveyMonkey connector synchronises automatically on a scheduler based on the “SurveyMonkey Refresh Interval (Minutes)” System setting.
- You can synchronise all the surveys manually, by going to [SurveyMonkey] Section > Actions menu > [Sync All Surveys].



- If you want to synchronise an individual survey, go to the SurveyMonkey record and click the “SYNC” button.

Setting up Survey Groups

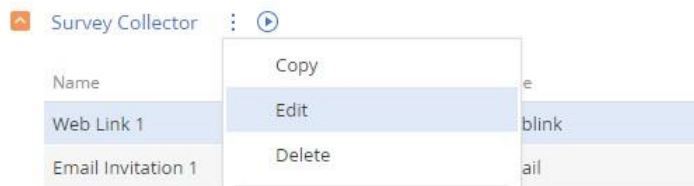
[Survey Groups] are only required to be set up if you want to email surveys or generate survey web links from the [Contact] section. Both these methods are trackable, meaning any responses will be linked to existing Creatio contacts.

Setting up a Web Link Survey Group

SurveyMonkey Web links can be shared with contacts via Email, Skype or any Social media platform.

To setup a non-trackable survey web link

1. In SurveyMonkey, [Configure web link collector](#)
2. In Creatio, go to [SurveyMonkey] section > open Survey
3. Click the sync button to pull the newly created collector
4. In the [Survey Collector] Detail, select the web link record > Edit.



5. Copy the [Web link] field and share it.

To setup a trackable survey Web Link

If you want to share a trackable web link, an “Advantage” SurveyMonkey plan is required.

1. In SurveyMonkey, [Configure web link collector](#)
2. In the desired SurveyMonkey survey, you need to add a custom variable. This can be done by the following steps:
 - a. Click the Design Survey tab.
 - b. In the left sidebar, click LOGIC.
 - c. Click Custom Variables.
 - d. Set up the first variable by completing the following fields:
 - e. Variable Name (required) = **Creatio**
 - f. Label (optional) = **Creatio**
 - g. Click Save.
3. In Creatio, go to [SurveyMonkey] section > open Survey
4. Click the [sync] button to pull the newly created collector
5. In the survey Group Detail, add a new record.

Agovo CRM Demonstration

SUMMARY → DESIGN SURVEY → PREVIEW & SCORE

QUESTION BANK ? v

BUILDER ? v

THEMES ? v

LOGIC ? ^

CUSTOM VARIABLES ?

Variable Name (required)

Max. 50 characters, no spaces

Label (optional)

Max. 250 characters

SAVE CANCEL DELETE

- **Name:** Enter any name which will appear in the [Contact] Action menu, [Generate survey Link]. The action menu link is where you can generate the weblink for the selected contact.
- **Collector:** Select the web link collector you created in step 1.
- **Description (Optional):** Only if you need additional information about the web link.

Agovo CRM Demonstration / Survey Group



CLOSE

Name* Agovo CRM Demonstration (Web Link) Collector Web Link 1

Description Survey on the effectiveness of the Agovo CRM Demo.

Type Weblink

6. In the [Contacts] Section, you will have a new option in the [Action] menu > [Generate Survey Link].

Contacts  

NEW CONTACT ACTIONS ▾

Contact name	Job title
Andrew Baker (sample)	Specialist
George Russell	
Zaid Abbas	

OPEN **COPY**

- Synchronize contacts
- Select multiple records
- Select all
- Export to Excel
- Add to folder
- Exclude from folder
- Show on map
- Show duplicate contacts
- Email Survey
- Generate Survey Weblink**
- Mark all email addresses as valid

Agovo CRM Demonstration (Web Link)

7. Select the desired contact, click the action button > Select the name of the Survey Group you created. This will generate a unique link for that contact that is shareable.

Success! Generated Weblink

CLOSE WINDOW CLOSE

Please use the copy link below and send it to your desired recipient. The link is also stored in the Contact (SurveyMonkey Tab)

Contact Name: Zaid Abbas

Email: z.abbas@agovo.co.uk

Copy Link: <https://www.surveymonkey.co.uk/r/KQNBFLN7BPM=0633893e-8b11-44fc-8609-d6d8aaa98b40>

8. This shareable link will also be available in the Contacts record, in the SurveyMonkey Tab.

Survey	Link
Agovo CRM Demonstration	https://www.surveymonkey.co.uk/r/KQNBFLN?BPM=0633893e-8b11-44fc-8609-d6d8aaa98b40

Setting up Email Survey Group

Setting an email survey group will allow you to email preconfigured surveys directly from Creatio. Emails could be sent from either the Contact section (Multiple recipients at once) or by setting a up a business process to automatically send a survey based on any condition.

To setup an email survey group:

1. In SurveyMonkey, [Configure an Email Connector](#). You do not need to necessarily send the email, just to the point where you have saved the message/template.
2. In Creatio, go to [SurveyMonkey] section > open Survey
3. Click the sync button to pull the newly created collector
4. Select the new email collector and click the small run process button in the detail, then select "SM – Get Latest Message". This will download the new message you created in step 1.

Name	Web Link 1	Weblink
SM - Get Latest Message		
	Email Invitation 1	Email

5. In the survey Group Detail, add a new record.
 - o **Name:** Enter the name which will appear in the [Contact] Action menu, [Email]. The action menu link is where you can email the survey for the selected contact/s.
 - o **Collector:** Select the email collector you created in step 1.
 - o **Message:** Select the newly downloaded email message (Step 3).
 - o **Description (Optional):** Only if you need additional information about the survey.



Agovo CRM Demonstration / Survey Group

CLOSE


Name* Agovo CRM Demonstration (Email) Collector Email Invitation 1
 Description _____ Message* We want your opinion
 Type Email

6. In the [Contacts] Section, you will have a new option in the [Action] menu > [Email Survey].

7. Select the desired contact/s, click the action button > Select the name of the Survey Group you created.

Contacts  

ACTIONS (2)

- Synchronize contacts
- Cancel multiple selection
- Deselect all
- Select all
-  Export to Excel
- Merge records
- Add to folder
- Exclude from folder
- Delete
- Show on map
- Show duplicate contacts
- Email Survey**
- Generate Survey Weblink

Account	Job
Accom (sample)	Spe
Our company	
GDPR Seminar Survey	
Agovo CRM Demonstration (Email)	

To Setup Automated Survey Email Delivery

8. (Optional) If you want to automate emailed surveys, you will need to create a new business process that links with the existing “SM - Send Survey (Single Email)” business process.
 - a. In Creatio, create a new business process.
 - b. Create the desired signal Trigger, for example, when an invoice has been marked as paid.
 - c. Add [Read data] element > Read Invoice (to get Invoice record)
 - d. Add [Read data] element > Read the contact (to get email address)
 - e. Add a Sub Process element and select “SM - Send Survey (Single Email)”.
 - f. Select the sub process element, then select the [1. Email Address] Parameter > then Process parameter
 - g. Select the Email field from the “Read contact” Process element.

Lookup value

SELECT CANCEL

Survey Group

Name **SEARCH**

Name	Description	Message
GDPR Seminar Survey		Did you enjoy the Agovo GDPR Seminar?
GDPR Webinar Survey		Did you enjoy the Agovo GDPR presentation?
Agovo CRM Demonstration (Email)		We want your opinion
Agovo CRM Demonstration (Web Link)	Survey on the effectiveness of the Agovo CRM Demo.	

Select parameter

SELECT CANCEL

< PROCESS ELEMENTS **PROCESS PARAMETERS**

Search process element **SEARCH** Search element

 Invoice Paid	 Busine
 Read Contact	 Email
 Read Invoice	 Facebc

- h. Select the [2. Survey Group] Parameter, then Lookup value.
- i. Select the survey group you created in step 5.
- j. Save (There is no need to fill anymore parameters in the SM – Send Survey Sub-Process. Once completed your Business process should look a bit like this:



Sub-process ⋮ i ×

 SM - Send Survey (Single Email)

Which process to run?

SM - Send Survey (Single Email) ↗

Process parameters

- T** 1. Email Address
[#Read Contact.First item of resulting co...
.....
- Q** 2. Survey Group
[#Lookup.Survey Group.Agovo CRM De...
.....
- T** Collector
.....
- T** Message
.....
- T** Survey
.....