



Poll Builder 7.0 User's Guide

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Burlington, MA 65 Network Drive Burlington, MA 01803 Tel: 781 863 8117 Fax: 781 863 8118	London, UK 247 Tottenham Court Rd, Third Floor London W1T 7QX Tel: +44 (0) 20 3219 6200 Fax: +44 (0) 20 7659 2100
New York, NY 352 7th Avenue New York, NY 10001 Tel: 212 631 7560 Fax: 212 631 7559	Seattle, WA 10885 NE 4th Street Suite 290 Bellevue, WA 98004 Tel: 206 682 7777 or 800 360 6245 Fax: 206 682 4859

Web

<http://www.e-dialog.com>

E-mail

U.S. Sales & Info <mailto:MaxROI@e-dialog.com>

UK Sales & Info <mailto:EuroSales@e-dialog.com>

Human Resources <mailto:positions@e-dialog.com>

Public Relations <mailto:press@e-dialog.com>

London Office <mailto:londonuk@e-dialog.com>

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Introducing Poll Builder

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About Poll Builder

e-Dialog Poll Builder™ lets you create simple polls that can either be embedded in an e-mail or linked to an e-mail or Website. A simple poll includes up to ten questions that appear on a single page. Answers to these questions can be submitted via radio buttons, checkboxes, drop-down menus, or a text input field of up to 256 characters. In a simple poll, you can also include a one-time text area response field that allows up to 4,000 characters.

Customization for Your Organization

e-Dialog configures Precision Central applications to meet your organization's specific preferences. Also, to accommodate the different access needs of individual users, e-Dialog sets up individual profiles based on user name. Your Professional Services Account Team helps to configure these preferences during your initial set-up process.

For example, your organization may want to provide certain employees with the ability to upload new audiences and assign these audiences to new users. On the other hand, others may only have the ability to upload a new audience solely for their own use. Or, some employees may not be able to send final e-mails, while others are allowed to do so.

Note: As a result of the modular approach, some of the functionality described in this document may not apply to you.

System Requirements

Precision Central 7.0 requires:

- ◆ Microsoft Windows or Apple Macintosh OS X*
- ◆ Adobe Flash Player 9.0.28 or newer

Adobe Flash Player is required only for Insight Builder, User Management, Precision Dashboard and Data Director.

- ◆ One of the following Web browsers:

§ **Internet Explorer 7** (<http://www.microsoft.com/downloads/>) on Windows

§ **Firefox 3** (<http://www.mozilla.com/en-US/firefox/>) on Windows and Macintosh OS X*

* The middle scroll button of a Macintosh mouse may not work consistently in Precision Central 7.0. This is a known issue in Adobe Flash Player.

Starting Poll Builder

To start Poll Builder:

- 1 Log in to Precision Central.
- 2 Select **Utilities > Poll Builder**.

See Setting Your Default Application in Introducing Precision Central 7.0 for instructions on specifying which application appears when you log in to Precision Central.

Getting a List of Polls

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Home Page

Home

Poll Builder

Filter Polls

Creation Date

From:

Feb

27

2009

To:

Mar

19

2009

Poll Info

Poll Id:

Status:

Poll Name:

Poll Author:

Create New Poll

Search

Clear

Poll Search Results

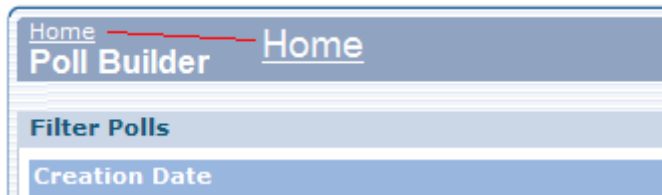
Id	Name	Status	Author	Edit	Preview	Clone	Report	Delete
3372	LS Test	Work in Progress/Offline	LStar					

The Home page displays a list of polls.

The status of a poll can be any of the following:

- ◆ Poll Never Completed – The user has not completed the six steps necessary to complete the poll. The poll in this state cannot be deployed.
- ◆ Work in Progress/Offline – A poll that is complete through all six steps, but is not available for deployment because the status has not been changed to Active/Online. The poll can still be edited in this state.
- ◆ Active/Online – The poll is complete and is available for e-mail or Web deployment.
- ◆ Expired/Offline – A poll with an expired Run End Date. Poll Builder automatically sets this status when Run End Date has passed.
- ◆ Deleted – A poll that is no longer available.

To return to the Home page at any time, click **Home**.



Filtering the List of Polls

You can limit the list of polls on the Home page based on criteria you specify, including the date when the poll was created, the poll ID, poll name, status, and author. You can specify multiple criteria to filter the list of polls.

To filter the list of polls by...	Do this...
Creation date	Specify the From and To dates by clicking the calendar icon and selecting the
Poll ID	Specify the Poll ID in the Poll ID text box.
Status	Select the status from the Status drop-down list.
Poll name	Enter at least a portion of the poll name in the Poll Name text box. If you enter portion of the name, Poll Builder finds all polls whose name contains the text y enter. The search is not case-sensitive.
Poll author	Select the author from the Poll Author drop-down list.

To filter the list of polls:

- 1 Specify the search criteria.
- 2 Click **Search**.

Creating a Poll

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Steps to Create a Poll

Poll Builder guides you through the steps to create a poll.

To begin creating a poll:

- 1 Go to the **Home page** (on page 9).
- 2 Click **Create New Poll**.

The screenshot shows the 'Poll Builder' interface. At the top, there's a 'Home' link and the title 'Poll Builder'. Below this is a 'Filter Polls' section with a 'Creation Date' filter. The 'From' date is set to Feb 27, 2009, and the 'To' date is set to Mar 19, 2009. Below the filter is the 'Poll Info' section with fields for 'Poll Id', 'Status', 'Poll Name', and 'Poll Author'. The 'Create New Poll' button is highlighted with a red box. To the right of this button are 'Search' and 'Clear' buttons. At the bottom, there's a 'Poll Search Results' table with columns: Id, Name, Status, Author, Edit, Preview, Clone, Report, and Delete. The table contains one row with Id 3372, Name 'LS Test', Status 'Work in Progress/Offline', Author 'LStar', and icons for Edit, Preview, Clone, Report, and Delete.

Poll Search Results								
Id	Name	Status	Author	Edit	Preview	Clone	Report	Delete
3372	LS Test	Work in Progress/Offline	LStar					

Step 1: Set Poll Properties

Home > Create New Poll
Edit Properties (Step 1 of 6)

Edit Poll Properties

* required field

Name:*

Description:

Status:*
Poll must have a status of "Active/Online" to be visible to end users.

Run Start Date:*

Run End Date:*

Poll properties are not visible to poll recipients.

To set poll properties:

- 1 Enter the name of the poll.
The name of the poll should be unique, although duplicate names are allowed.
- 2 Enter the description of the poll.
- 3 Select the poll status from one of the following:
 - § Work in Progress/Offline – A poll that is complete through all six steps, but is not available for deployment because the status has not been changed to Active/Online. The poll can still be edited in this state.
 - § Expired/Offline - The poll has expired or its Run Start Date is in the future.
 - § Active/Online – The poll is complete and is available for e-mail or Web deployment.
- 4 Select the Run Start Date
This is the date when the poll is first made available to recipients. This value defaults to the day you create the poll; however, you can select any future date.
Note: To automatically make a poll available on a specific date, its status must be Active/Online on that date.
- 5 Select the Run End Date
This is the date when the poll is no longer available to recipients. This value defaults to two weeks after the day you create the poll; however, you can select any date after the Run Start Date. When the Run End Date is reached, the poll's status is automatically changed to Expired/Offline.
- 6 Click **Save** to save your work at any time.

- 7 Click **Poll Copy** to go to Step 2.

Step 2: Set Header/Footer and Introduction

The screenshot shows a web interface for editing a poll. At the top, a breadcrumb trail reads 'Home > Create New Poll'. Below this is a header bar with the text 'Edit Copy (Step 2 of 6)'. The main content area is titled 'Edit Poll Copy'. In the top right corner of this area, there is a red asterisk followed by the text '* required field'. There are three text input fields, each with a label to its left and a red asterisk indicating it is required. The first field is labeled 'Poll Header:*' and contains the text 'Cats vs. Dogs'. The second field is labeled 'Introduction Copy:*' and contains the text 'Which do you prefer, cats or dogs?'. The third field is labeled 'Poll Footer:*' and contains the text 'Meow! / Woof!'. Each field has a vertical scrollbar on its right side. At the bottom of the form, there are four buttons: '<< Back', 'Cancel', 'Save', and 'Poll Questions >>'.

Poll copy is visible to the recipient. These fields are optional and accept plain text and HTML.

To specify poll copy:

- 1 Enter poll header information.
The poll header appears at the top of the poll.
- 2 Enter introduction copy.
Introduction copy describes or introduces the poll.
- 3 Enter poll footer information.

The poll footer appears at the bottom of the poll, after the questions.

- 4 Click **Save** at any time to save your changes and remain at this step.

You can click **<<Back** at any time to return to the previous step. If you have made changes that are not saved, the system prompts you to continue or cancel.

You can click **Cancel** at any time to return to the Poll Builder Home page without saving your changes. If you have made changes that are not saved, the system prompts you to continue or cancel.

- 5 Click **Poll Questions>>** to save your changes and continue to Step 3: Configuring Poll Questions.

Step 3: Configure Poll Questions

[Home](#) > [Create New Poll](#)
Edit Questions (Step 3 of 6)

Other Questions
No other questions currently exist for this poll

Edit Question

* required field

Question:*

Question Type:*

User Response Required?: ☐ **Short Error Message:**

Question Order:

Responses (at least one response is required)

Response 1: ✖

Response 2: ✖

Response 3: ✖

Add Response >>

<< Back

Cancel

Save and Start New Question

Save

Save and Continue to Thank You >>

Poll questions and responses are visible to the recipient. At least one question is required. You can create up to ten questions per poll.

To specify questions:

- 1 Enter the text of a question in the Question text box.

Note: If you include more than one question in your poll, e-Dialog strongly recommends that you number each question. This helps the reader answer the questions in the correct order.

You can include HTML in the text of the question to format the question the way you want.

Sample questions include:

- § 1. What is your favorite news source?
- § 2. When do you expect to purchase a new computer?
- § 3. What of the following movies have you seen?

- 2 Select the question type, including:

- § Checkboxes – The recipient can select more than one checkbox in response to the question.
- § Radio Buttons – The recipient can select only one of the group of mutually exclusive options.
- § Drop-down – The recipient can select only one item from the list.
- § Single-line Text Input – The recipient can type text into a one line box.
- § Multi-line Text Area – The recipient can enter text into a multi-line box, without space restrictions.

- 3 Specify whether the recipient must respond to the question by checking the "User Response Required" checkbox.

- 4 (optional) Enter a short error message to display if the recipient does not answer a required question, such as "Please respond to Question One."

- 5 Specify the sequence of the question in the Question Order drop-down.

Poll Builder displays an error if you do not specify the question order.

Note: If you have numbered your questions, ensure that they follow the correct sequence.

You can change the order of existing questions using the **Question Order** setting on the **Questions** tab of the **Manage Poll** page.

- 6 Enter the possible responses in the **Response** fields.

- a) Click  to remove a response field.
- b) Click **Add Response** to add another response field.

- 7 Click **Save** at any time to save your changes and remain at this step.

You can click **<<Back** to return to the previous step. If you have made changes that are not saved, the system prompts you to continue or cancel.

You can click **Cancel** at any time to return to the Poll Builder Home page without saving your changes. If you have made changes that are not saved, the system prompts you to continue or cancel.

- 8 Click **Start New Question** to add a new question to your poll.

- 9 Click **Save and Continue to Thank You** when you are done creating and configuring poll questions to save your changes and continue to Step 4.

You can perform the following actions on existing questions:

- ◆ Click  to edit the question.
- ◆ Click  to delete the question.

Step 4: Configure Thank You and Expired Poll Messages

[Home](#) > [Create New Poll](#)
Edit Thank You (Step 4 of 6)

Select Thank You Option

* required field

☒ **Select this option to display a Thank You message to the user upon submitting the poll**

Thank You Message Copy:

☐ **Select this option to redirect the user to the URL you specify upon submitting the poll**

Thank You Redirect URL:

Select Expired Poll Option

* required field

☒ **Select this option to display a message to the user if the poll is no longer active**

Poll Expired Message Copy:

☐ **Select this option to redirect the user to the URL you specify if the poll is no longer active**

Poll Expired Redirect URL:

Poll thank you and expired information is visible to the recipient. The fields are optional and accept plain text and HTML.

The thank you information is displayed to the user after they have responded to the poll. The expired information is displayed when a recipient submits a response to a poll that is no longer active because the status is Expired/Offline or the Run End Date has passed.

- 1 Do one of the following:
 - § To specify the thank you message text, click "Select this option to display a Thank You message to the user upon submitting this poll" and then enter the text of the message in the Thank You Message Copy text area.
 - § To specify a URL for a web page that you want the user to go to upon submitting the poll, click "Select this option to redirect the user to the URL you specify upon submitting the poll" and then enter the URL in the Thank You Redirect URL text box.
- 2 Do one of the following:
 - § To specify the message text that appears when the user tries to participate in a poll that has expired, click "Select this option to display a message to if the poll is no longer active" and then enter the text of the message in the Poll Expired Message Copy text area.
 - § To specify a URL for a web page that you want the user to go when the user tries to participate in a poll that has expired, click "Select this option to redirect the user to the URL you specify if the poll is no longer active" and then enter the URL in the Poll Expired Redirect URL text box.
- 3 Click **Save** at any time to save your changes and remain at this step.

You can click **<<Back** to return to the previous step. If you have made changes that are not saved, the system prompts you to continue or cancel.

You can click **Cancel** at any time to return to the Poll Builder Home page without saving your changes. If you have made changes that are not saved, the system prompts you to continue or cancel.
- 4 Click **Poll Style** to save your changes and continue to Step 5.

Step 5: Style Your Poll

Home > Create New Poll
Edit Style (Step 5 of 6)

[Poll](#)
[Thank You](#)
[Expired Message](#)

Edit Poll Style

/* Styles for entire poll */
#pollcontainer{}

/* Styles for question block */
#questioncontainer{}

/* Font styles for Intro Copy */
#pintrocopy-font{}

/* Font styles for Header */
#pheader-font{}

/* Styles for Footer */
#pfooter{}

/* Font styles for Footer */
#pfooter-font{}

/* Font styles for entire poll */
#pollcontainer-font{}

/* Font styles for question block */
#questioncontainer-font{}

/* Header style */
#pheader{}

/* Styles for Intro Copy */
#pintrocopy{}

Cats vs. Dogs
Which do you prefer, cats or dogs?
I like:

☐ To curl up with my pet.
☐ To go for walks with my pet.
☐ To not have a pet.

I prefer a pet who:

☐ Greets me when I come home.
☐ Gives me my space.
☐ Showers me with affection.

Cats are:

☐ Aloof
☐ Dignified
☐ Adorable

Dogs are:

Use image for submit button (Y/N)?: ☐ Image URL:

[<< Back](#)
[Cancel](#)
[Save](#)
[Save and Continue to Deployment >>](#)

You can specify the look of your poll. You must be familiar with HTML and style sheets (CSS) to edit styles using this page.

The left panel shows the style elements that you can edit to change the appearance of information displayed to the recipient.

The right panel shows the copy as it appears to the recipient. However, if you specified a redirect URL for the thank you or expired messages, you cannot edit the style and the right panel does not display a tab for that message. When you select a tab above the right panel, the left panel changes to display the HTML coding for the page you selected.

To specify the appearance of your poll:

- 1 Click the **Poll** tab in the right panel.

To specify the look of the thank you message, you click the Thank You tab in the right panel. Similarly, you click Expired Message to change the look of the message that appears when a recipient tries to access a poll that has expired.

- 2 Edit the style of the elements whose appearance you want to change.

You specify the style by entering style information in the curly braces (`{}`). For example, to make the entire poll appear in a sans-serif font, change `#pollcontainer{}` to be `#pollcontainer{font-family: sans-serif}`. For more information, consult a reference on cascading style sheets.

- 3 To specify a different image for the Submit button, check the "Use image for submit button" option and enter the URL that points to the image to use.

The image can be in any standard graphics format, such as GIF, JPG, or PNG.

- 4 Click **Save** at any time to save your changes and remain at this step.

You can click **<<Back** to return to the previous step. If you have made changes that are not saved, the system prompts you to continue or cancel.

You can click **Cancel** at any time to return to the Poll Builder Home page without saving your changes. If you have made changes that are not saved, the system prompts you to continue or cancel.

- 5 Click **Save and Continue to Deployment** to continue to Step 6.

Note: The way your poll appears in Microsoft Outlook 2007 might not be as expected. This is a known issue in Outlook 2007.

Step 6: Deploy Your Poll

Home > Create New Poll

Deployment (Step 6 of 6)

Poll Deployment Options

Embed Poll in a Mailing:

#SP.PBUILDER.GETPOLL(2425,1).FULLPOLL__

(For HTML mailings only) To display a poll in the mailing, copy and paste the above into your mailing content

Link to Poll from a Mailing:

http://qa-demo-pb-1.eng.e-dialog.com

To put a link to the poll into a text or other mailing, copy and paste the above into your mailing content

Link to Poll from Web Site:

<A HREF="http://qa-demo-pb-1.eng.e-dialog.com/pbp/?p;pollid=2425

To put a link to the poll on your web site, copy and paste the above into the HTML for your web page(s)

HTML Source for Poll to Display on Web Site:

<table border="0" cellpadding="1"
<tr>
<td colspan=
<
</td>
</tr>
<!--begin poll content--:
<td colspan="2" id="ph

To embed the poll on your web site, copy and paste the above into the HTML of your web page(s)

<< Back
Cancel
Finish >>

You can deploy your poll by doing any of the following:

- ◆ Embedding Your Poll In a Mailing

You copy information directly into the HTML-format e-mail to embed the actual poll in the e-mail message.

Note: Outlook 2007 HTML e-mail does not allow form functionality. Therefore, embedded polls are no longer active. Fields (text input, drop-downs, radio buttons and checkboxes) are replaced with empty square brackets [] and buttons are deactivated. Because polls are often the most active and popular links in an e-mail, ensure that any poll in the HTML e-mail is accompanied by a link allowing the recipient to try it online if it is not available via e-mail. This best practice also extends to Web-mail clients, which often change security settings that render e-mail polls inactive.

◆ **Linking To Your Poll From a Mailing**

You embed a link to the poll in the e-mail.

◆ **Linking To Your Poll From Your Web site**

You embed this poll in your Web site.

◆ **Embed your poll in your Web site**

You copy the source code for the poll to an HTML page on your Web site. When you do so, you can update the code at any time and you can link to the page where you host this poll from any of your mailings.

◆ **Embed your poll in an e-mail**

You copy the source code for the poll into the content of an e-mail.

Note: To make sure your cut and paste operation is accurate, click in the appropriate text box, press **<CTRL-A>** to select all, **<CTRL-C>** to copy the selected text, then go directly to your target e-mail client or HTML editor and press **<CTRL-V>** to paste the text.

To deploy your poll:

1 Do one of the following:

- § To embed your poll in a mailing, copy the information from the Embedding Your Poll in a Mailing text box and paste it in the e-mail message where you want the poll to appear.
- § To link to your poll from a mailing, copy the information from the Linking To Your Poll From a Mailing text box and then paste it in the e-mail message where you want the link to the poll to appear.
- § To link to your poll from your Web site, copy the information from the Linking To Your Poll From Your Website text box, and then paste it into the HTML of a Web page where you want the link to the poll to appear.
- § To embed your poll in your Web site, copy the information from the HTML Sourcecode To Your Poll for Display on Your Website text box, and then paste it into the HTML of a Web page where you want the poll to appear.
- § To embed your poll in an e-mail, copy the information from the HTML Sourcecode To Embed in e-Dialog Mailings text box, and then paste it into the content of an e-mail.

You can click **<<Back** to return to the previous step. If you have made changes that are not saved, the system prompts you to continue or cancel.

You can click **Cancel** at any time to return to the Poll Builder home page without saving your changes. If you have made changes that are not saved, the system prompts you to continue or cancel.

2 Click **Finish** at any time to go to the **Manage Poll** page.

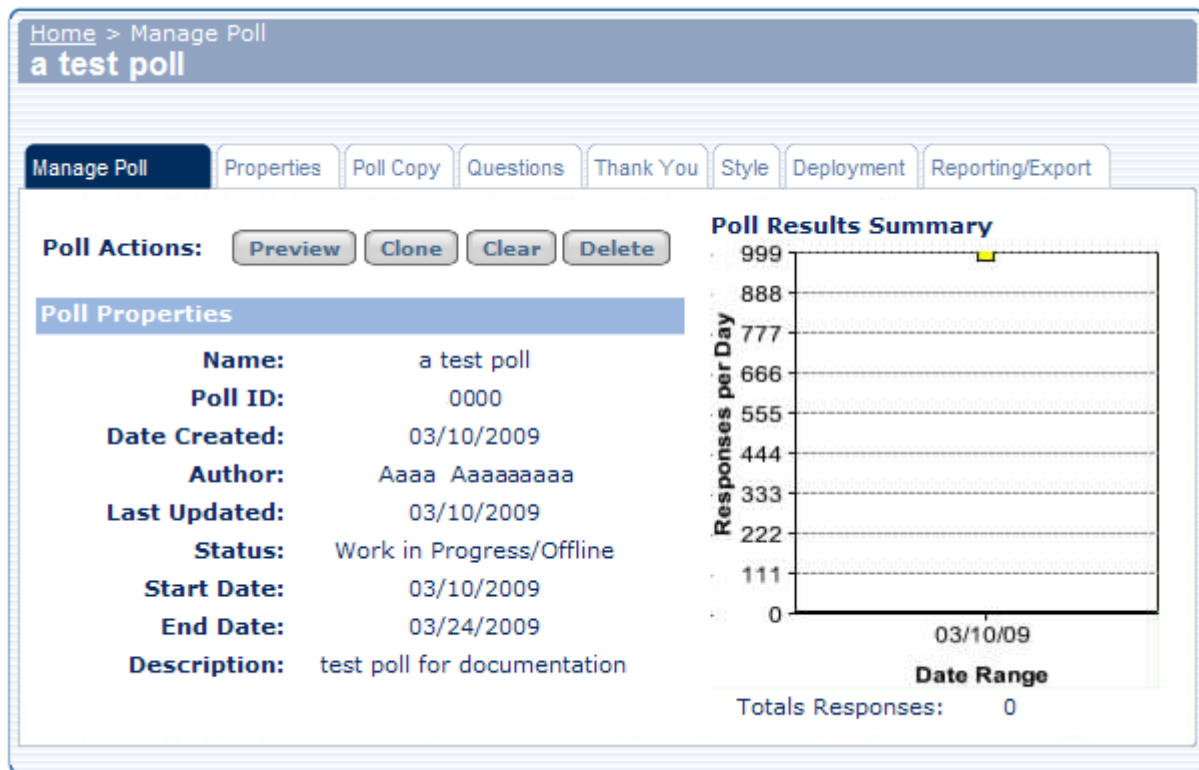
Note: Your poll must be set to status Active/Online for the recipient to be able to view and respond to it. If you did not set the status to be Active/Online, from the Manage Poll page, click the **Properties** tab and switch the status field to **Active/Online**.

Modifying Polls

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Cloning an Existing Poll.....	Error! Bookmark not defined.
Clearing Poll Results	Error! Bookmark not defined.
Deleting a Poll	Error! Bookmark not defined.

Editing an Existing Poll



From the Manage Poll page, you can make changes to any of the information entered in the poll creation process.

You can go to the Manage Poll page from the Poll Builder Home page by clicking the name of an existing poll.

The following types of edits are available using the tabs on the Manage Poll page:

◆ Properties

Click the **Properties** tab to edit poll properties. See **Step 1: Set Poll Properties** (on page 12) for more information.

◆ Header/Footer and Introduction

Click the **Poll Copy** tab to edit the poll header, footer, and introduction. See **Step 2: Set Header/Footer and Introduction** (on page 13) for more information.

◆ Questions

Click the **Questions** tab to edit poll questions. See **Step 3: Configure Poll Questions** (on page 14) for more information.

◆ Thank You

Click the **Thank You** tab to edit thank you and expired poll messages. See **Step 4: Configure Thank You and Expired Poll Messages** (on page 16) for more information.

◆ Style

Click the **Style** tab to edit poll styles. See **Step 5: Style Your Poll** (on page 18) for more information.

◆ Deployment

Click the **Deployment** tab to specify deployment options. See **Step 6: Deploy Your Poll** (on page 20) for more information.

In addition, you can view and export the results of a poll by clicking the **Reporting/Export** tab. For more information, see **Viewing Poll Results** (XE "Viewing Poll Results")