



Automatic removal of closed/deactivated surveys from member portal



Why automatic removal of closed surveys?

Problem

Currently, the members of a community see the closed/deactivated surveys under Surveys tab, until it has been manually removed by the Community Manager.

User Story

Antonia is a Community Manager. She wants to float a survey across the community limiting the number of responses through quota or end date and time. Post completion, she wants the closed surveys not to be displayed on member portal automatically.



How does it work?

Solution

While sending a survey invitation to the community members, the Community Manager should be able to limit the number of responses for the campaign in two ways:

1. Response Quota
2. Close date and time

Once the defined criteria is reached, that particular survey will not be visible on member's dashboard, nor under "New" section in Surveys tab.



How to handle deactivated surveys?

The automatic closure of project and disappearance of surveys from portal will happen when:

1. the response quota set from Communities settings is met **(to be introduced)**
2. the close date/time from Communities delivery option is reached **(to be introduced)**

Only survey will disappear but no changes to Project status will happen when:

1. a survey is deleted
2. the response quota set from Surveys settings is met
3. the close date/time from Surveys settings is reached



New proposals and solutions

Solution

- A new Settings icon will be introduced for Project Closure options against every project listed under History tab
- The existing running projects will also be able to set Automatic Closure settings
- The Settings option will disappear once the project is closed
- While updating the Response quota, the new input will be validated against the already captured completed responses

| Wireframes (Panel)

Under 'Delivery options' in the 'Send' page, 'Automatic Closure' toggle option will be visible.

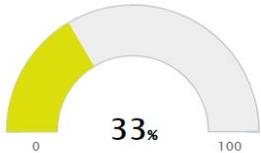
Community Send Incentive Modules Analytics

Send History Templates Broadcast Email Preferences SMS Logs

Portal Link Preview

Compose Email Select Recipients Send

Recipients: 2
Verified members in community: 6



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View Download

Delivery Options Preview Email Preview SMS

Send Later:

Resting Period Rules:

Sub Sample Selection:

Automatic Closure: 

Notification Options

Email Notification:

Push Notification:

SMS Notification: You dont have SMS credit. [Add SMS credit](#)

Process Delivery

When the user puts the toggle on, the window for response quota and close date & time appears. The user can define the criteria as per the requirement. Once the limit is reached, the survey will not be visible in the member portal.

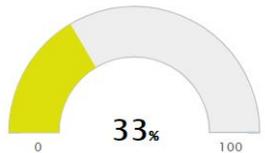
Community Send Incentive Modules Analytics

Send History Templates Broadcast Email Preferences SMS Logs

Portal Link Preview

Compose Email Select Recipients **Send**

Recipients: 2
Verified members in community: 6



View Download

Delivery Options Preview Email Preview SMS

Send Later: ?

Resting Period Rules:

Sub Sample Selection:

Automatic Closure: Response Quota

Close Date & Time
Asia/Kolkata

Notification Options

Email Notification:

Push Notification:

SMS Notification: You dont have SMS credit.

« Previous **Process Delivery** ✓

« Previous **Process Delivery** ✓

A new Settings option is introduced under the History Tab. This option will be visible until the project is active.

Communities ▾ My Communities Upgrade Now ?

Community Send Incentive Modules Analytics

Portal Link Preview

Invitation History

[+ New Project](#) [Download History](#)

Date	Name	Status	Initial Sent	Success Count	Completed	
10/20/2020 <i>28 days ago</i>	Lakhotia - Earn Points <i>News Channel</i>	Project Closed <i>Initiated: mayank.lakhotia@questionpro.com</i> <i>Closed: mayank.lakhotia@questionpro.com, 10/20/2020</i>	2	2	0 (0.0%)	
10/06/2020 <i>1 month ago</i>	Lakhotia - Earn Points <i>News Channel</i>	Delivery Successful <i>Initiated: mayank.lakhotia@questionpro.com</i>	2	2	0 (0.0%)	

Project Status

- Automatic Closure
- Close Project

Upon clicking Automatic Closure setting, the user can update the response quota or the Close date and time, anytime in between until the project is active.

The screenshot shows a web application interface for managing communities. A modal dialog titled "Automatic Closure" is open in the center. The dialog has a close button (X) in the top right corner. It contains the following settings:

- Automatic Closure:** A toggle switch that is currently turned on (green).
- Response Quota:** A text input field containing the value "500".
- Close Date & Time:** A date input field containing "11/17/2020" with a calendar icon, and a time input field containing "12:00 AM" with a clock icon. A "Reset" link is positioned to the right of the time field.

At the bottom of the dialog, there are two buttons: "Cancel" and "Save".

The background interface shows a navigation bar with "Communities" and "My Communities" tabs. Below the navigation bar, there are tabs for "Community", "Send", "Incentive", and "Modules". The "Send" tab is active, showing an "Invitation History" table with columns for "Date" and "Name". The table lists two entries for "Lakhotia - Earn News Channel":

Date	Name
10/20/2020 28 days ago	Lakhotia - Earn News Channel
10/06/2020 1 month ago	Lakhotia - Earn News Channel

On the right side of the background interface, there is a "Preview" button and a "Completed" section showing progress bars for "0 (0.0%)" and "0 (0.0%)".

Project Details | Automatic Closure

If automatic closure is set for any project, we can find the same information under 'Project Details' in Summary page of the project.

The screenshot displays the QuestionPro interface. At the top, there is a navigation bar with tabs for 'Community', 'Send', 'Incentive', 'Modules', and 'Analytics'. Below this is a toolbar with icons for 'Send', 'History', 'Templates', 'Broadcast Email', 'Preferences', and 'SMS Logs'. A 'Portal Link' field contains the URL 'http://lakhoria.questionpro.com' and a 'Preview' button. The main content area shows a summary of project statistics: 'Drop-Out (After Starting)', 'Terminated', 'Quota', 'Bounced', and '0 SMS Sent'. A red box highlights the 'False Sticky' status. Below this is the 'Project Details' section, which lists various project attributes. A red arrow points to the 'Automatic Closure' field, which is set to 'Response Quota'.

Field	Value
Status	Project Closed
Invitation Type	Single Response
Project Requestor	mayank.lakhoria@questionpro.com
Survey	News Channel (Survey ID : 7661025)
Survey Length	8 Minute(s)
Survey Points	Complete: 0 Quota: 0 Terminate: 0
Delivery Options	Email : ON SMS : OFF Default Footer Settings : ON Push Notification (for mobile application) : OFF
Automatic Closure	Response Quota : 500 Close Date and Time: NONE Closure due to : Response quota

| Project Details| Automatic Closure

The closure messages are listed below:

1. Closure due to: Response quota
2. Closure due to: Close date and time



Any Questions?

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