

How to edit a post chat survey

Add a post chat survey interaction and choose a survey by clicking Behaviour. In the drop-down Survey ID select a survey from the available options to add to the interaction. The drop down is populated by surveys created in Puzzel Insight / Survey Management. The survey must have "Status: Active" to work.

The screenshot shows the 'Post chat survey' configuration interface. At the top, there are three fields: 'Interaction Name' (Post chat survey), 'Interaction Type' (render), and 'Description' (Post chat survey template). The main area is split into two panes. The left pane, titled 'Design', shows a preview of the survey with the title 'Thumbs up or thumbs down?' and the question 'How would you rate your overall satisfaction with the [support/service] you received?'. It features two thumbs icons (red down and green up) and a 'Complete Survey' button. The right pane, titled 'Behaviour', contains the 'Survey Behaviour' settings. A red box highlights the 'Survey ID' dropdown menu, which is currently set to 'Chat survey'. Below this, there is an 'Embedded' toggle switch (turned on), an 'On complete event' dropdown set to 'load interaction', and a 'Target interaction' dropdown set to 'Post chat template'. At the bottom right of the interface are 'Cancel' and 'Save' buttons. A zoom control at the bottom left shows the preview is at 80%.