How to Create a Campaign

Creating a New Campaign

To create a new campaign, the first step is to head to the ‘Overview’ tab under the Campaigns section in your Usabilla account.

In the **Overview tab**, you can view all of your created campaigns and make new ones. To get started, click on **“New Campaign”** in the upper right hand corner. Then, select your campaign type and click create campaign.

Here are the steps we took in the training to create a Slide Out Campaign:

1. The first step is to **name your campaign**. Make sure to name your campaign something that is simple and easy to understand. In the video example, we create an NPS slide out, and we named this survey: “NPS Survey – Slide out – Training video.”

2. The next step is to **attach the campaign to a button**. This is important because the campaign fires from the same javascript snippet that is attached to the button on your site. In summary, it must be attached to the button that is on the pages you want to show the campaign on.

3. The next page is the **Form Editor**. You are able to **customize the campaign questions** in this section. When you click on any of the question types on the left, they are immediately dropped into the form. We personally recommend getting familiar with all of the question types by dropping them all into a test form and then clicking on the gears to view the settings.

4. Next, **set up your visibility rules**. With visibility rules, you are able to determine which questions a visitor does or doesn’t see based on their previous responses. In our NPS survey example, we want to ask a follow up question to all of our detractors (those selecting ≤ 6) to find out, “How can we improve?” To do this, we dropped in the “Text Area” option, and clicked on the gear to access the options. From here, we can control that when a user answers our NPS question with 0 to 6, a custom follow up question will show.

5. Next it’s time to set up your **jump rules**. With this functionality, you can send your participants to a completely separate page based on their previous responses. Let’s say you want to ask a few follow up questions to your promoters. The first step would be to add a new page and name it accordingly. Then you can add a jump rule by clicking on the gear on the start page. You can chose that when a survey participant answers your NPS question with 9 or 10 (the promoters), they are sent to the promoters page.

6. To **customize the look of your campaign**, click on **advanced**. Here you can select your custom theme as well adjust the position, offset, and width.

7. Finally, it’s time to **preview your campaign.** You can do this by clicking on open preview, which allows you to preview your campaign before it is set live.

Those are the basics for creating and customizing a campaign. It differs slightly for the other campaign types that aren’t a “slide out survey,” but not by much.

Be sure to check out our support articles on how to set up each campaign type. The links are added below. There you’ll also find articles that show you how to do some of the more advanced campaign functionality as well such as, setting visibility rules, changing themes, and creating templates.