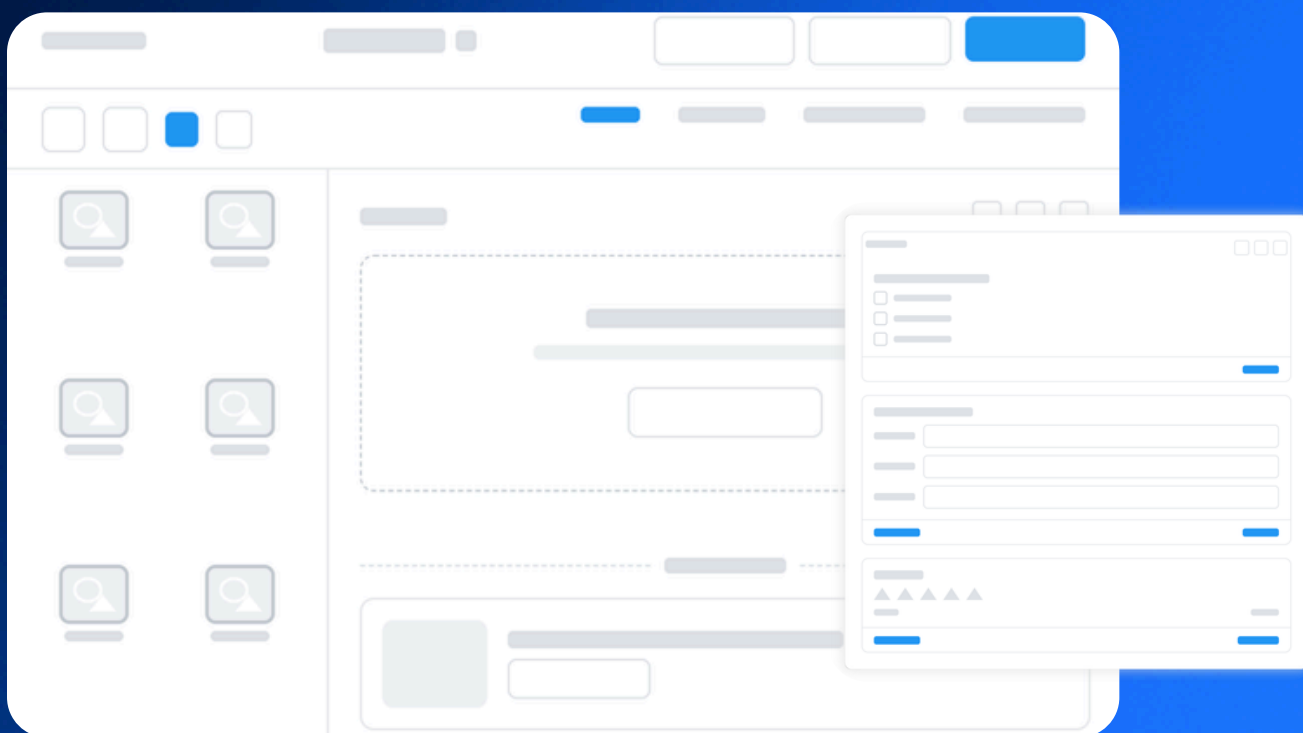


REFERENCE GUIDE

Quizzes

Build, score, and share your quizzes



Quiz List and Builder Tabs

What It Is

A quiz scores answers, shows a result, and saves the taker as a contact. You find quizzes by searching for Quizzes. Each quiz opens in a builder with four tabs.

How It Works For Your Business

- Search for Quizzes to see every quiz you have built.
- Use the add button (often + Add Quiz) to start from scratch or from the Template Library.
- Edit is for building, Settings holds scoring and results, Notifications handles emails.
- Submissions lists everyone who took the quiz and what they answered.
- Integrate, Preview, and Save sit at the top right of the builder.

Quiz List and Builder Tabs – Tips & Guidelines

Tips

- Click Save often so changes are never lost.
- Preview before you share anything.
- Button names can shift, so read what is on screen.
- Open a blank quiz and click every tab to learn the layout.

DO

- Click through all four tabs
- Save before you leave
- Use Preview often
- Say the button name you see

DON'T

- Leave without saving
- Share before previewing
- Assume buttons never change
- Skip the Submissions tab

Using Quiz Templates

What It Is

Templates are ready-made quizzes with questions, styles, and results already built. You preview one, use it, and edit it to fit your needs.

How It Works For Your Business

- Click Create quiz, then choose the template option (Template Library or similar).
- Scroll the gallery and read each title and short description.
- Use filter or search if offered, then click a template to open its preview.
- Click the confirm button (Use Template or Continue) to open it as a new quiz.
- Edit questions, answers, styles, logic, and results, then rename and save.

Using Quiz Templates – Tips & Guidelines

Tips

- Previewing changes nothing, so look at several.
- Using a template never touches your other quizzes.
- Templates are built to look good on phones.
- Custom user-made templates are not available yet.

DO

- Preview three before choosing
- Rename right away
- Edit every line to sound like you
- Save when done

DON'T

- Leave the template name as is
- Skip the preview
- Assume it must be perfect
- Forget to save

Pages, Questions, and Contacts

What It Is

Quizzes are built in pages, and each page is one screen. You add questions from a list of types and add personal info fields to capture who took the quiz.

How It Works For Your Business

- On the Edit tab, click the option to add a page. Pages show in order.
- Add a question and pick a type: Single Choice, Multiple Choice, Yes/No, Short Answer, Long Answer, Number, Dropdown, or Rating.
- Type the question and answers in the settings on the right, and toggle Required if needed.
- Add personal info fields like Full Name, First Name, Last Name, Phone, Email, or Date of Birth.
- Drag questions to reorder them, even onto a different page.

Pages, Questions, and Contacts – Tips & Guidelines

Tips

- Two or three questions per page keeps a quiz light.
- Single Choice and Yes/No are easiest to score.
- Typed answers give insight but are harder to score.
- Mark Email Required so you can follow up.

DO

- Put contact fields on the last page
- Mark Email Required
- Test every question type once
- Preview the whole quiz

DON'T

- Pile questions on one page
- Ask for a phone you will not use
- Skip the email field
- Forget to save

Styling and Elements

What It Is

The Styles & Options panel controls how a quiz looks and behaves. Styles covers layout, colors, background, footer, and labels. You can also add text, images, and HTML.

How It Works For Your Business

- Click the lines-and-dots icon at the top right to open Styles & Options.
- Layout sets spacing, including the top margin.
- Colors & Background changes the look, and Footer styles the bottom of the quiz.
- Click one element to find label position arrows in the right sidebar: left, right, or top.
- Add Text, Image, or HTML elements from the add list on any page.

Styling and Elements – Tips & Guidelines

Tips

- Check text is easy to read after every color change.
- Keep image files small so pages load fast on phones.
- On phones, labels default to the top.
- Use HTML only if you already know HTML.

DO

- Use your brand colors
- Keep labels consistent
- Add your logo as an image
- Preview on every change

DON'T

- Use light text on light
- Mix label positions
- Upload huge image files
- Paste code you do not know

Sharing: Link and Embed

What It Is

The Integrate button gives you two ways to share a quiz. The Link is a direct web address. The Embed code is an iframe that shows the quiz inside your own page.

How It Works For Your Business

- Click Integrate at the top right of the builder to open the share panel.
- Link: click to copy, then paste it into email, text, social posts, or chats.
- Embed: copy the iframe code for pages like a website or funnel step.
- Open a funnel step, add a custom code element (custom JS or HTML), and paste the code.
- Save, preview, make the element taller if cut off, then publish the page.

Sharing: Link and Embed – Tips & Guidelines

Tips

- Test the link in a new tab or private window.
- Use the link for email, text, and social posts.
- Use the embed when your page already has your logo and menu.
- Element names vary, so look for the closest match.

DO

- Test in a private window
- Take your own quiz once
- Match link or embed to the use
- Preview the embedded page

DON'T

- Test only while logged in
- Share an untested link
- Embed in a tiny box
- Publish before previewing

Scores, Categories, and Tiers

What It Is

Scoring gives each answer points. You can score toward an overall total only, or assign answers to categories. Tiers like Low, Medium, and High turn scores into groups.

How It Works For Your Business

- On a question, use the score field to give each answer its points.
- Choose Overall Only, or assign an answer to a category when you want separate scores.
- In Settings, open Categories and add the categories your quiz needs.
- An answer can count toward one or more categories.
- Define Low, Medium, and High tiers with score ranges, names, and colors.

Scores, Categories, and Tiers – Tips & Guidelines

Tips

- Start with Single Choice and Yes/No for clean scoring.
- Check the help article for exactly how percentages are figured.
- Keep tier ranges from overlapping or leaving gaps.
- Give tiers clear names a taker will understand.

DO

- Score every answer on purpose
- Name categories clearly
- Cover the full score range
- Test with sample answers

DON'T

- Leave answers unscored
- Overlap tier ranges
- Use vague category names
- Skip testing the math

Results, Alerts, and Submissions

What It Is

The results page is what a taker sees after finishing. Notifications email you and the taker. Submissions shows every response and the contact it created.

How It Works For Your Business

- In Settings, open the Results Template and click Edit Template.
- Sections include Header, Overall Score, Category Score, Individual Category, Call to Action, and Footer.
- Write dynamic messages that change by tier.
- On the Notifications tab, set an email alert for yourself and an auto-responder for the taker.
- On Submissions, open any entry to see answers and the contact it created.

Tips

- Write a different message for each tier.
- Keep the Call to Action to one clear next step.
- Send yourself a test submission to check both emails.
- Check Submissions after your first test.

DO

- Edit every tier message
- Preview the results page
- Test both notification emails
- Open a submission to check it

DON'T

- Show every tier the same text
- Add many calls to action
- Skip the auto-responder test
- Forget to save the template

Personality Quizzes

What It Is

A personality quiz shows a result based on the category a person scores highest or lowest in, instead of a total score. You write a result message for each category.

How It Works For Your Business

- In Settings, choose the result type: Highest Category or Lowest Category.
- Create one category for each personality or outcome.
- Assign each answer to the category it points toward.
- Write result messaging for each category.
- Use individual category personalization to tailor what each taker sees.

Personality Quizzes – Tips & Guidelines

Tips

- Use three to five categories so results feel distinct.
- Give each category a name that feels like a result.
- Take the quiz several times to see every outcome.
- Highest suits personality types, and lowest suits what to improve first.

DO

- Make every category reachable
- Write a message for each one
- Preview each result
- Pick Highest or Lowest on purpose

DON'T

- Create categories with no answers
- Reuse one result message
- Skip testing every outcome
- Overload with categories

Custom Fields and Workflows

What It Is

Quiz results can be saved to contact custom fields. A Quiz Submitted trigger can start a workflow, and you can branch on the score field with an If/Else step.

How It Works For Your Business

- Open Results Template, Edit Template, then Settings at the top right.
- Use the Custom Fields dropdown to toggle Overall Score, Score Tier, category scores, and highest or lowest category.
- After a submission, the auto-created fields show on the contact.
- Use those fields in a Smart List filter to group people.
- Search for Workflows, add the Quiz Submitted trigger, pick your quiz, save, add an If/Else, and publish.

Custom Fields and Workflows – Tips & Guidelines

Tips

- Map only the fields you will really use.
- Submit a test entry so the fields exist before you build.
- Use the quiz filter so the trigger fires for the right quiz.
- Publish the workflow only after testing.

DO

- Map the fields you need
- Test with a sample entry
- Filter the trigger by quiz
- Publish after testing

DON'T

- Map every field by habit
- Build before a test entry
- Leave the trigger unfiltered
- Forget to publish

Key Terms Glossary

Quiz

Questions that score answers, show a result, and save the contact.

Template

A ready-made quiz you can open and edit.

Page

One screen of the quiz your visitor sees at a time.

Single Choice

A question where the person picks exactly one answer.

Required

A toggle that makes people answer before moving on.

Label

The question text above or beside an answer box.

Integrate

The button that gives you the quiz link and embed code.

Iframe

A window on your page that shows your quiz inside it.

Category

A group of answers that earns its own score.

Score tier

A Low, Medium, or High range that sorts a score.

Custom field

A saved contact detail, like a quiz score or tier.

Trigger

The event, like Quiz Submitted, that starts a workflow.

Getting Help

Software changes over time, so a button or menu may look a little different from this guide. If something does not match, check the quiz builder's own in-app help or help articles. The steps and ideas here still apply.