



Using Quota Management Quick Start Guide

This guide is part of the Survey Coach Quick Start Guide series.

For guides on other topics, please visit www.zoomerang.com/qs or click the **Support/Help** link on any Zoomerang page.

Quota Management is a powerful feature available only to Zoomerang Pro subscribers.

Using Quota Management

Quota Management allows you to control the distribution of survey responses to a particular closed-ended question or combination of up to three questions. The survey will close automatically when the quota values you define for each group of answer options have been reached.

Follow the steps below to define a quota based single-question-as you launch your survey:

1. Create a survey with at least one closed-ended question. For more information about how to set up your survey, refer to the *Creating a Survey Quick Start Guide*.
2. Click on the **Edit** link next to the Quota Management section header on the **Survey Launch Confirmation** page.

The **Define a Quota** page is now displayed.

3. Select the **Question** from the drop-down that you want to use as the basis for your quota.

Question:

10. In which state do you live?

Note: Only closed-ended questions will appear in the drop-down to choose from; if your survey does not contain any closed-ended questions, you will not be able to define a quota for that survey.

Zoomerang Support Resources

Learn More Links

Click on any of the **Learn More** links next to some of the features within Zoomerang to bring up help articles directly related to that topic.

Demo Videos

We have several short demo videos that show you how to create, deploy, and analyze the results of your survey. Visit www.zoomerang.com/demos for a complete list.

Online Support Center

Just click the **Support/Help** link on the top of any Zoomerang page to be taken to our Online Support Center. Once there you can:

- Search our extensive Knowledge Base
- Submit your question to our support team
- View your support question history

User Forums

Curious about how others are using Zoomerang? Visit our User Forums at forums.zoomerang.com to find out and ask any questions you might have about using Zoomerang.

Telephone Support

Paid members have phone support available to them. Just click the **Support/Help** link at the top of any Zoomerang page once you are logged in for a list of support phone numbers.

Tips on Using Quotas

Quota Management Best Practices

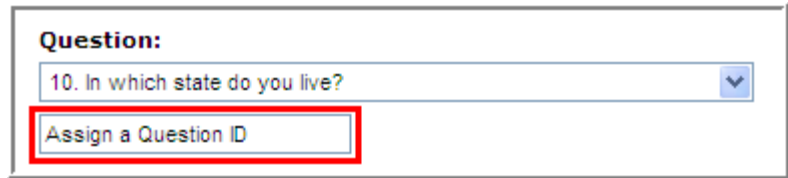
- Define your quota before you launch your survey.
- Your survey has to include at least one closed-ended question.
- The question used to define your quota should be mandatory.
- If you make a copy of a survey that contains a quota, the quota definition will not be copied over.
- After the survey has launched, you should only increase quota values; decreasing quota values after the survey has launched may cause inconsistent results.
- A survey scheduled to close by a total number of completes should be set to allow at least as many completed survey responses as the total of quota values for all groups defined by Quota Management.

Quotas can be set based on the following Question Types:

- Choice - One Answer (Bullets)
- Choice - One Answer (Drop Down)
- Choice - Multiple Answer (Bullets)
- Rating Scale - One Answer (Horizontal)
- Yes or No

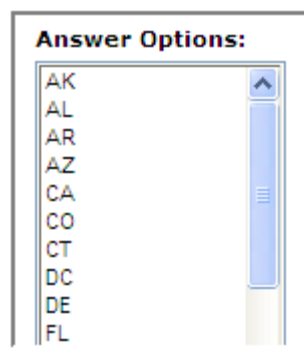
Quotas cannot be set for open-ended questions.

4. Enter a **Question ID** in the field below the question selection to identify your quota.



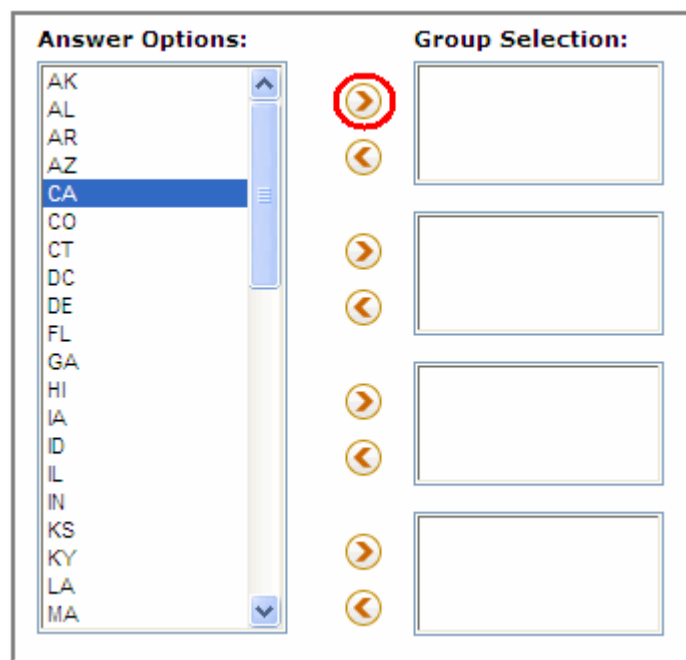
The screenshot shows a 'Question:' dropdown menu with the text '10. In which state do you live?' and a downward arrow. Below the dropdown is a text input field with the placeholder text 'Assign a Question ID', which is highlighted with a red border.

5. All possible answer options for the question you select will automatically populate in the **Answer Options** column on the left side of the page.



The screenshot shows a vertical list of US state abbreviations under the heading 'Answer Options:'. The list includes AK, AL, AR, AZ, CA, CO, CT, DC, DE, and FL. A scroll bar is visible on the right side of the list.

6. Select an answer option to and then click on the right arrow button next to the group you would like to move it into.



The screenshot shows the 'Answer Options:' list on the left, with 'CA' selected. To the right is the 'Group Selection:' area, which contains four empty rectangular boxes. Between the list and the boxes are four pairs of arrow buttons (right and left). The top right arrow button is circled in red.

- You may create up to four groups of answer options.
- You may add as many answer options as you like to each group.
- Each answer option may only be applied to one group but you do not have to move every answer option into a group, as shown in the example below.

Answer Options:		Group Selection:
AK	➤	CA
AZ	➤	NV
HI	➤	OR
Outside the U.S.	➤	WA
	➤	CO
	➤	ID
	➤	MT
	➤	NM
	➤	AL
	➤	AR
	➤	IA
	➤	IL
	➤	CT
	➤	DC
	➤	DE
	➤	FL

- When at least one answer option is moved into a group, the shaded checkmark next to the **Group Name** is colored green to indicate the group is active.

7. Enter a **Group Name** to identify each group.

Group Name:
✓ Pacific Time Zone
✓ Mountain Time Zone
✓ Central Time Zone
✓ Eastern Time Zone

8. Enter the number of survey responses you would like to receive for each group.

Note: You will not be able to submit your selection until the value for each active quota group is greater than 0. If you do not want to include any responses for a particular group as part of your quota, remove the answer options from the group by selecting each one and clicking on the left arrow button.

9. Click on the **Submit** arrow to apply your selections.



- Respondents who complete the survey before all quota values are met will be directed to the Thank You page upon completing the survey and will be counted as Completes.
- Respondents who do not finish the survey are counted as Partial and do not count towards the quota.
- If a respondent meets the criteria defined by a quota that has already reached its required quota value, the respondent will be directed to an Over Quota page in place of the Thank You page, and is counted as an Over Quota rather than a Partial, Complete, or Screen Out.
- You can customize the Over Quota page the same way you can the other survey end pages. Refer to the *Launching Your Survey Quick Start Guide* for more information.
- When the last quota cell has reached its quota value the survey will close automatically and respondents will be taken to the Survey Closed page.

Continue with the following steps to use Advanced Quota:

Advanced Quota allows you to create quota definitions for up to three closed-ended survey questions.

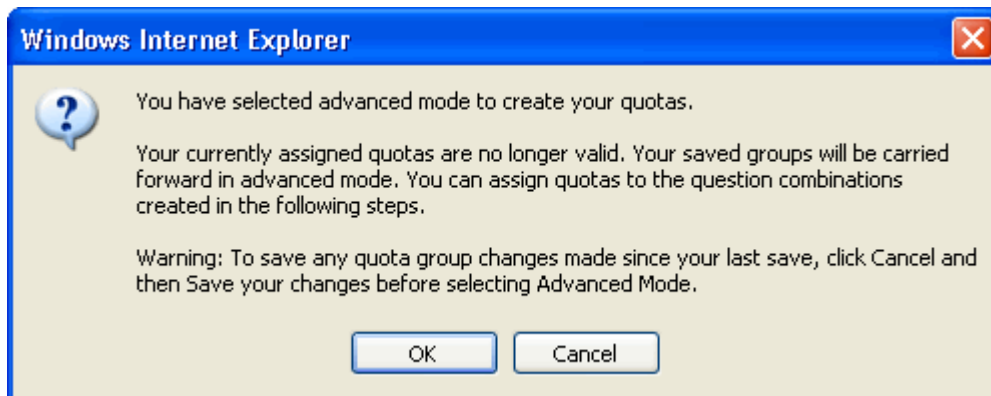
10. Click on the **Advanced Mode** button at the bottom of the **Define a Quota** page.



Note: The **Advanced Mode** button will not be active unless you have more than one closed-ended question in your survey.

You can define a quota for up to three survey questions, as long as your survey includes at least three closed-ended questions to choose from.

11. A confirmation message will display on the screen indicating that you will lose any unsaved data if you continue.



12. Click **OK** to continue.

Note: Any saved quota entered on the previous screen will be carried forward, but any **Quota Values** entered on the previous screen (for a single-question quota) will not be carried forward.

Quota Values will not be assigned for each individual group; you will assign **Quota Values** based on unique combinations of answer groups.

13. On the **Define Advanced Quota Groups** page, select the **Question**, **Question ID**, **Group Selection**, and **Group Name** for both sets of quota groups on the page.

The **Question IDs** and **Group Names** you enter for each question will be used to identify each quota group when you assign values to any combination of quota groups, as well as when you review and filter your results.

If you will only include two questions for your quota, both question sets on the page must be defined before you can submit the page and define quota values.

14. Click on the **Add Third Question** button at the bottom of the screen if you would like to include quota groups from another question in your quota combination.



15. Click **OK** in the confirmation message displayed on the screen.

16. Select the third **Question**, **Question ID**, **Group Selection**, and **Group Name**. All three question sets must be defined before you can continue.

17. Click on the **Submit** arrow at the bottom of the page to continue.



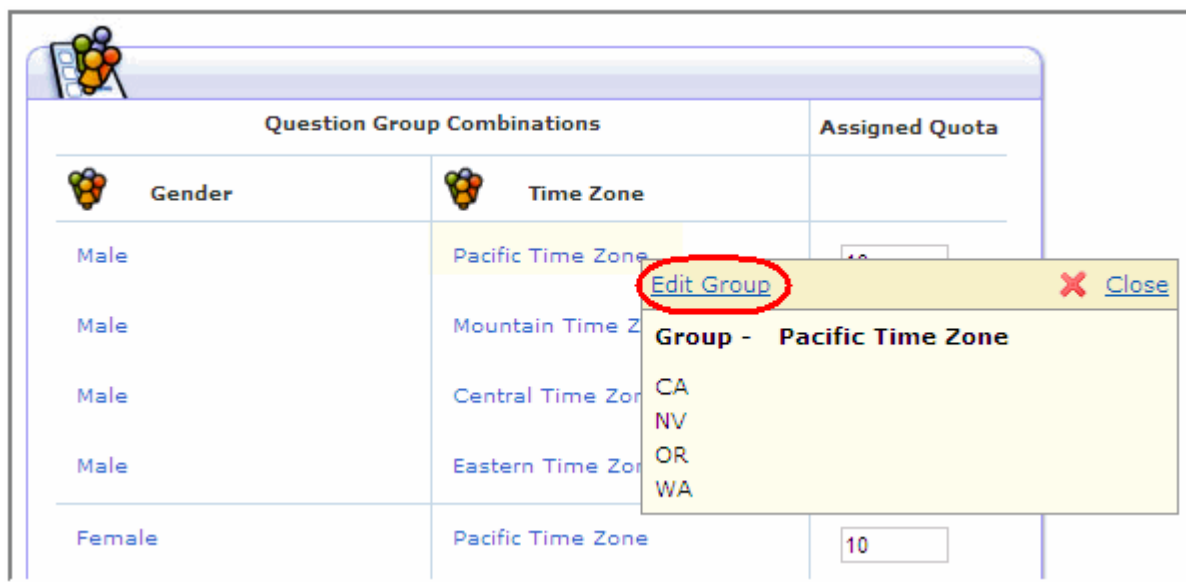
18. Enter the quota values (the number of completed responses you would like to allow from each **Question Group Combination**) in the corresponding **Assigned Quota** box in the last column of each row.





Question Group Combinations		Assigned Quota
 Gender	 Time Zone	
Male	Pacific Time Zone	<input type="text"/>

Note: You do not have to assign quota values for each row, but you must enter at least one quota value for any row.

19. Hover your cursor over any group name to view the selection of answer options assigned to the group.
20. Click on the **Edit Group** link within any Quota Group summary box to return to the previous screen and make changes to any of the quota groups.



Question Group Combinations		Assigned Quota
 Gender	 Time Zone	
Male	Pacific Time Zone	<input type="text"/>
Male	Mountain Time Zone	<input type="text"/>
Male	Central Time Zone	<input type="text"/>
Male	Eastern Time Zone	<input type="text"/>
Female	Pacific Time Zone	<input type="text" value="10"/>

[Edit Group](#) ✕ Close

Group - Pacific Time Zone

- CA
- NV
- OR
- WA

Or click on the **Edit** button at the bottom of the screen.



Note: You can only make changes to the quota groups until the survey is launched.

21. Click **OK**.

Note: The quota values you entered will not be saved.

22. Click on the **Submit** arrow to save your selections and apply the quota to your survey.



- Respondents who meet all of the quota group criteria in a single row and complete the survey will be counted towards the quota for that particular combination.
- Respondents who meet all quota group criteria for a combination with no value assigned will not be counted towards a quota.
- Respondents who submit an answer that qualifies them for a quota combination that has already been met will be directed to the Over Quota page.
- The survey will automatically close when all of the quota combinations have been reached.

Note: When a survey is copied or created from a template, quota definitions are not copied over. The Over Quota page settings are copied, similar to other survey end page settings.