SMS Signal platform guide

Surveys and research operations

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Use this guide to build and test research activities, create respondent lists, assign dashboard tasks, manage recruiters and appointments, and download the resulting data. It covers the platform currently available to staff and respondents.

Start with the study workflow

Create the activities, test them, and make them live. Create your respondent list once, then connect it to the relevant dashboard or activity. Review completion alongside the original survey, agreement or upload records.

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Platform addresses

Staff platform: https://app.sms-signal.co.uk
Respondent activities and dashboards: https://respond.sms-signal.co.uk
Product website and guide downloads: https://site.sms-signal.co.uk

Getting started and staff access

1. Open the staff platform and sign in with your authorised ChatGPT account. Active SMS Signal membership is also required.

2. Choose the workspace for your activity. Create a survey, agreement, file form or booking project and give it a clear name. Names must be unique within that workspace; the same name can be used in a different workspace.

3. Build the content and wait for the saved confirmation. Use the preview and check a complete journey before publication.

4. Make the activity live, then distribute its link or assign it as a dashboard task. Assigning a draft does not publish it.

5. Review the activity's own collected data and use respondent tracking to check progress.

Workspace or tool	Use it for
Survey Builder	Questionnaires, shared test links, results, reports and tabular data exports.
Agreements & Consent	Agreement forms, decisions, typed names, signatures and PDF records.
File Uploads	Upload forms with multiple fields, instructions and attachment records.
Respondent Dashboards	Personal task pages, completion history and project-manager messages.
Recruiter Dashboards	A personal recruiter portal with assigned surveys across several jobs.
Respondent Lists	Central contacts reused across activities and dashboard projects.
Response Tracking	Cross-workspace lists, completion summaries and Excel downloads.
Bookings	Project calendars with time slots, capacity and booking records.

Accounts and shared work

Ordinary users work with their own activities and Centralised surveys shared with the workspace. Admins can see all users' work and manage app users. Staff use User settings to change their display name and review their own activity; admins also have user-management controls.

In Surveys, the author or an admin can move a saved survey to Centralised surveys through Actions. Shared users can edit it. An editor-presence notice identifies other people editing the same survey. Author, creation and last-edit details help identify the current work.

Survey building and answer options

Open Survey Builder, select New survey and give it a name. Open a question from the left outline to edit it in the centre; use the right settings panel for its behaviour. The outline is shown in the builder and preserves your working scroll position.

1. Add a question from the grouped question picker. Give it meaningful wording and a unique question code such as Q1.

2. Enter answer options, row topics or scale columns. Use the bulk editor to add or update a list instead of typing each item separately. Check codes as well as text.

3. Set required answers, numeric limits and the settings specific to the question. Drag questions in the outline to reorder them.

4. Use Page break before to start a new page. Page settings control whether Back and Continue appear and what those buttons say.

5. Preview this question, then test the whole survey. Check the save status before leaving.

Wording and defaults

Use the wording controls for font, size, colour, bold, italic, underline and alignment. Survey defaults provide a consistent starting style. Answer instructions can be edited separately on each question. Multi to Single has separate multiple-selection and single-selection instruction fields.

Response options

- Randomise option order and mark individual options Do not randomise when their position should stay fixed.
- For multi-punch questions, mark an option exclusive when it must not be selected with another option.
- Enable Other text per option and choose whether typing is required. An optional image can appear below the option wording.
- Set the number of columns for single- and multi-punch options when that improves the layout. Test narrow mobile screens as well.

Piping and internal notes

Use {Q4} in later wording to pipe an earlier answer. Use {Q1_1_O} to pipe typed Other text for option code 1 on Q1. Piping follows codes rather than randomised positions. Add internal question notes for staff; Word export offers a choice to include them.

Voice input and current logic scope

Open Ended, Amazon Review and Fav + Unfav can offer Allow voice dictation. It depends on browser support and microphone permission; typing remains available. The browser may use its own speech service. SMS Signal stores the resulting text, not a recording.

Custom jump rules and entry/exit set-answer scripts are not active in the current saved/live survey flow. AI-probing controls are stored configuration and are not connected to an AI service. Do not rely on these controls to route or populate answers.

Question catalogue part one

The builder has 29 question types. Use the category picker to choose a format; configure the available settings and test it with realistic answers.

Category	Question type	What it collects
Presentation	Presentation	Text or an uploaded video; no answer is collected.
Choice	Single Punch	One selected response.
Choice	Multi-Punch	Several responses, with optional exclusivity and Other text.
Choice	Multi to Single	Several choices followed by one main choice from those selected.
Choice	Card Sorting	A category assignment for each card.
Grids	Single Punch Grid	One coded answer per row.
Grids	Multi-Punch Grid	Several coded answers per row.
Grids	Numeric Grid	A numeric value per row and column cell.
Grids	Rating Grid	A star or smiley rating per row.
Grids	Slider Grid	A separate slider value for each row.
Numbers and scales	Numeric	A whole number or decimal within configured limits.
Numbers and scales	Numeric with banding	A numeric answer and an automatically derived band.
Numbers and scales	Net Promoter Score	A 0-10 score and its standard NPS category.
Numbers and scales	Rating	A rating using stars or supported emoji smileys.
Numbers and scales	Slider	A value selected on a configurable scale.

Multi to Single

The multiple-selection stage comes first. A single selected option is automatically coded as the main choice. By default, the follow-up question appears when at least two options are selected. Its display setting and both instruction texts can be edited in the builder.

Grids on mobile

Single- and multi-punch grid questions use mobile-friendly dropdown controls on narrow screens. Desktop grid selections have larger clickable areas around their controls. Check the mobile preview and a real device before launch.

Question catalogue part two

Category	Question type	What it collects
Numbers and scales	Ranking	An order or rank for each option.
Special	Household Composition	Household count, then gender and age band for each person.
Special	Amazon Review	A five-star rating plus a written review with separate prompts.
Special	Fav + Unfav	Favourable and unfavourable comments in two coloured boxes.
Written answers and dates	Open Ended	A written answer within a character limit.
Written answers and dates	Date	A date.
Written answers and dates	Date and Time	A local date and time.
Written answers and dates	Dual Date / Time	Two values with ordering and optional interval constraints.
Appointments	Appointments	One appointment slot with a capacity limit.
Files and capture	Attach File / Upload	One or several attachments.
Files and capture	Image Capture	A selected image or a supported device-camera photo.
Files and capture	Signature	A standalone drawn signature.
Agreements and details	CDA / NDA Agreement	Agree/disagree; agreement prompts a typed name and signature.
Agreements and details	General Details	Configured name, address, phone and email fields.

Household Composition

Set the maximum household size, gender choices and age bands. Optionally link the respondent's earlier Numeric or Numeric with banding answer and Single Punch gender answer so their own row is prefilled. The follow-up includes the respondent and requires one completed row per household member.

Dates and appointments

Dual Date / Time requires the second value to follow the first. You can prevent a first date before today and limit the gap in days, hours or minutes. Check the configured time zone. Appointments offer slots with individual capacities; a full slot becomes unavailable and submissions enforce the capacity limit.

Media and signatures

Presentation questions may show an uploaded video. File and image questions collect attachments when the response is submitted. Standalone signatures collect a drawn mark; agreement questions add an explicit decision and typed name. Use approved agreement wording for your study.

Testing publication and links

Three ways to test

- Preview question tests the selected question on its own.
- Test survey opens a full survey preview in a separate window. Use Desktop or Mobile to check layout. These local preview answers do not enter live data or consume appointment capacity.
- View test link opens the survey's stable shareable review link. Give it to clients or colleagues without staff accounts. Update test version to publish newer draft edits to that review copy. Shared-test submissions are separate from live responses.

Check both the confirmation screen and the route back. On completion, the last question should disappear. Review the logo, instructions, required-note visibility and page-number settings in Survey settings. Publish changes when a live definition needs updating.

Live and Draft

Make Live publishes the activity and permits collection. Make Draft pauses it while retaining its link and responses. A live survey cannot be deleted. Close it or make it draft first, then use Delete and enter DELETE exactly. Deletion is permanent and removes its collected records and uploads.

Public and individual links

General survey and form links are public and do not require a ChatGPT account. They are marked noindex, nofollow and noarchive. Those directives discourage indexing; they do not prevent link sharing or provide a password.

1. Create or import respondents in Respondent Lists and choose the relevant activity or dashboard assignment. Use the template and preserve IDs as text, including leading zeroes.

2. Choose the whole list or selected people. Reuse the generated links rather than creating unrelated duplicate entries.

3. Use individual-link controls for single or multiple use. Bulk controls can update several links. Allow another entry starts a new permitted entry after collection.

4. Review started and completed status. A page view alone is not proof of a submitted response.

Progress and link names

Individual links can restore partial progress. Files and photos must be selected again if they are not yet submitted. General links can retain progress on the same device. Use the short automatic URL or a custom link name where available. New links use respond.sms-signal.co.uk; previously issued ChatGPT-domain links still work.

Data exports and reporting

Open a survey's Links & data area to view records and download data. Load the correct survey and link history; saved responses retain their own question definition, so later wording changes do not overwrite historical labels.

CSV layout

Each respondent submission occupies one row. Composite answers are split into scalar columns. Choose Codes only, Text labels only, or Codes and text labels. In the combined format, each coded column also has a label column.

Answer type	Column layout
Single Punch	One answer column.
Multi-Punch	One column per option: 1 selected, 0 not selected; unanswered items stay blank.
Single Punch Grid	One column per row, containing its selected answer code or label.
Multi-Punch Grid	One column per row and option, using selection indicators.
Numeric Grid	One column per row and column cell. Zero remains a numeric answer.
Ranking and Card Sorting	One column per option/card for its rank/category.
Multi to Single	Separate selection-option columns and one main-choice column.
Other text	Its own column, such as Q1_2_O.
Review and Fav + Unfav	Separate rating/review or favourable/unfavourable columns.
Household and details	Separate count, person fields and contact-detail fields.
Dates appointments and uploads	Separate component fields and per-file metadata.

Headers use question codes and response codes, for example Q2_1 or Q5_A_2. Treat respondent IDs as text when importing CSV into Excel. Code and text labels are drawn from the definition saved with each response. JSON remains available as a structured record archive.

Results and reports

Use Results to review charts and question summaries, choose per-question chart styles and formatting, and prepare a downloadable report. Cross-tabs compare selected questions with their relevant bases. Check the bases for multiple-response questions before interpreting percentages.

Survey document export offers a printable Word or PDF copy, with options for question IDs, configured logic information and internal notes. Response Tracking can download an Excel workbook with Collected data and Completion summary sheets for a list.

Respondent lists and dashboard setup

Create people once

1. Open Respondent Lists and create a study list. Download its CSV template.

2. Add respondent ID, name and the email needed for dashboard access. Keep serial numbers consistent across the study.

3. Import and review the rows. Link the whole list or selected people to a dashboard, survey, CDA or file form.

4. Use Choose list inside a workspace to select an existing list. Review matching IDs before adopting an existing respondent record.

5. Sync list updates when contact details change; retain the original linked history.

Create the dashboard project

Open Respondent Dashboards, create a project, give it a title and add the welcome message. Link the respondent list. Each person receives their own dashboard link and signs in with their recorded email and respondent ID. No separate dashboard password is required.

The welcome message can be changed in project settings and appears in full above task controls after sign-in. The login page stays generic and does not display the respondent's personal information.

Add and manage tasks

Add surveys, agreements or upload forms as tasks, using a clear respondent-facing title and instructions. The underlying activity must be live, and the project owner must retain access to it. Assigning a draft is allowed, but the task stays unavailable until publication.

- A one-off task moves to Completed after a successful submission.
- For multiple entries, choose unlimited use or a ceiling such as 5 completed entries.
- Mark a task Priority if it must be completed before ordinary tasks. Applied CDAs always come first.
- For a later survey, choose an earlier SMS Signal survey and a delay in minutes or hours. The wait starts at the first successful completion and is not restarted by repeat entries.

External surveys

Add an External task for a client-hosted survey. Import or map each respondent's unique HTTPS link to the central-list ID. SMS Signal can record opening and optional self-reported or staff-confirmed completion; it cannot see the client's answers or verify completion automatically.

Tasks messages and respondent access

What the respondent sees

The personal dashboard shows the welcome message, task progress and Tasks to do / Show completed controls. Task lists use pages when necessary. A one-off completed CDA can be found under Completed, with its signed PDF download. Repeat tasks keep a tally and offer Add another entry until their limit is reached.

An amber partial indicator identifies a started but unfinished entry. Continue task resumes it when available. A saved completion includes the recorded completion date. The progress summary counts tasks rather than adding every repeated submission together.

Understand availability

Displayed state	Meaning and staff action
Locked	An agreement, priority task or waiting-period rule is still outstanding. Check the named prerequisite.
Unavailable or paused	Check that the underlying survey/form is live, the task and dashboard are enabled, and the owner has access. Signing a CDA does not publish a draft activity.
Completed	A successful qualifying submission is recorded. View its history or downloads.
Entry limit reached	The configured ceiling is met; no further entry can start.
No link assigned	An external task has no matching unique link for this respondent.

Messages

Message us direct opens a private conversation with the project team. Staff can read and reply from the dashboard workspace or the central Messages area beside their user controls. Unread indicators and a New message popup help surface incoming replies. A successful send clears the compose box; a failed send retains the text.

The displayed response expectation is up to 24 hours. It is not an automated response promise. Staff can enable or disable messaging on the relevant dashboard/recruiter setup; when disabled, the respondent's chat window is hidden.

Device access

Respondents can switch light or dark mode and use Add to Home Screen. Supported browsers may offer an install prompt; other devices receive shortcut instructions. The dashboard still requires a connection and sign-in. Staff preview opens do not count as a respondent's first dashboard visit; the contact list records first access through the respondent link.

Recruiter dashboards

A recruiter dashboard belongs to a person rather than to one project. A recruiter can have several survey jobs in one personal portal. The recruiter uses it to record entries while recruiting respondents for the surveys assigned to them.

1. Open Recruiter Dashboards and create the recruiter with their name, recruiter ID and email.
2. Assign a survey to that recruiter, or select several recruiters for a group assignment.
3. Set the task title and repeat-entry settings appropriate to the job. The source survey must be live.
4. Copy the recruiter's stable portal link and supply their sign-in details through your normal process.
5. Review the assigned-survey completion count and open the recruiter's entries from the staff view.

Repeat entries across jobs

Every submitted entry remains associated with the recruiter and assigned survey. A repeatable task stays available after submission, subject to any ceiling you set. Adding another job to a recruiter does not require a separate personal dashboard. Removing one assignment does not change another recruiter's work.

Reviewing entries

Use the assigned survey's entry-view control to inspect that recruiter's submissions and the question wording saved with each response. Review the original survey's collected data for the overall project. Counts should be compared with submitted records rather than link opens or partial entries.

Communication and convenience

Recruiter portals can use direct messages with the project team. The staff Messages area brings respondent and recruiter conversations together and shows unread activity. Messaging can be enabled or disabled. Add to Home Screen offers the same device shortcut flow as respondent dashboards.

Access and administration

Recruiters are portal contacts, not automatically staff users. Their portal sign-in does not grant access to the builder, other recruiters or company-wide records. Staff ownership and admin access still apply to the directory. Keep recruiter IDs stable, and use the same recruiter's portal across jobs rather than duplicating the person for every assignment.

Agreements and file uploads

Agreements and Consent

1. Create a form and add agreement elements. Enter the approved wording and clear Agree/Disagree choices.

2. An Agree response prompts for a typed name and drawn signature. Test all agreement elements before making the form live.

3. Link a respondent list or assign the form as a dashboard task. Every applied CDA must be signed before other dashboard tasks can start.

4. Use View signed / status from the form overview to see each person's signed or not-signed state. Download individual signed PDFs or the bulk ZIP.

A Disagree response is retained but does not satisfy the signing gate. A respondent can return and sign. Signed records preserve the wording, typed name, drawn signature, respondent ID and signed date from the original submission. Later edits do not rewrite that historical record.

File Uploads

1. Create an upload form. Add one or several file-upload elements with their own headings, instructions and required settings.

2. Configure permitted extensions or MIME types, single/multiple selection and per-file limits. Test a valid file and an invalid one.

3. Make the form live, then share its link or assign it as a dashboard task.

4. Review attachments in the form's collected records. Respondents can view and download their own submitted attachments from their dashboard.

Limits and naming

Live collection supports up to 10 MB per file, 20 MB total per response and up to ten attachments in a multiple-file field. Large respondent videos are not covered by these upload limits. Presentation-video hosting is a separate feature from collecting respondent video files.

Bulk downloads use ZIP archives. Filenames start with the respondent ID or serial and include cda or the file type, followed by references that distinguish separate records. Keep leading zeroes intact when preparing respondent IDs.

Microsoft integration status

The current platform stores its own activity records and attachments. Automatic OneDrive filing and Outlook invitation emails have not been implemented. Connecting Microsoft apps to ChatGPT is a separate authorisation step and does not itself configure SMS Signal to transfer files or send email.

Bookings

Bookings is available from the top-left button on the workspace launcher and through workspace navigation. It creates separate booking projects while using the platform's existing staff access and public collection controls.

1. Choose Create project. Enter a project name and respondent instructions, such as the session location and what to bring.

2. Select a date on the calendar. Add a start time, optional end time, capacity and optional slot label. Add further dates or slots as needed.

3. Check Settings for the time zone and booking confirmation message. At least one future slot is required before making bookings live.

4. Select Make live, then copy the public booking link. Respondents choose an available date and slot and provide their booking details.

5. Review the calendar and the Bookings tab. Download CSV for the booking list. Use Refresh to load the latest bookings.

Capacity and changes

Each slot has its own capacity. Full slots are unavailable, and capacity is checked when a booking is submitted so simultaneous respondents cannot overbook a slot. Past appointments cannot be booked.

Slots with bookings keep their date and time and cannot be removed. Their label can be updated and capacity cannot fall below existing bookings. Changing a draft slot does not update the public page until you publish the changes.

Pause and resume

Pause bookings stops collection while keeping the project, booking link and collected records. Make live resumes the same project. A slot's existing bookings remain counted after pause/resume. Share the project's live link rather than recreating the project for every session.

What the confirmation means

A booking is confirmed when submission succeeds and the booking confirmation appears. The record includes the selected slot and submitted contact details. This build does not send an automatic confirmation email, create an Outlook event, or provide respondent cancellation/rescheduling.

Appointments in surveys

The Appointments question type can also be used inside a survey. Bookings adds a dedicated staff project calendar and booking-management view around a slot selection and contact-details form.

Troubleshooting and launch checks

Issue	Check
A name exists but is not in this workspace	Names are now unique per workspace. An agreement and survey may share a name, but two surveys cannot. Check private and Centralised surveys for a duplicate.
A signed CDA is completed but a task is unavailable	Check the linked activity is live. Also check project/task/contact status and owner access. A completed CDA clears its gate but does not publish drafts.
A task remains locked	Check all applied CDAs, any outstanding priority task and the configured unlock time.
The test link shows an old question	Select Update test version; draft edits do not silently replace a client review copy.
The live survey shows an old question	Publish changes and reopen the respondent link. Check which survey you edited.
An attachment disappeared on resume	Reselect the unsubmitted files, then submit and wait for confirmation.
Save needs attention	Retry, or reopen the latest central draft after a revision conflict. Do not assume the local edit was published.
Links still show the old hostname	Refresh the app and reopen the link panel. Existing links continue to work.
A live survey cannot be deleted	Make it draft or close it, then use Delete and type DELETE.
Dictation is unavailable	Use a supported browser and allow its microphone request, or type the answer.

Before distributing links

- Check every question code, option code and required setting. Test Other text, exclusive options, piping and mobile grids.
- Finish a full preview, check the end screen, then publish the intended version.
- Test with a fictional contact: login, sign the CDA, start the next task, submit, return and check completion.
- Verify that tasks are live and that priority rules, delays and entry ceilings match the study plan.
- Download a small test export and confirm option/grid columns, labels, respondent IDs and attachments.
- Check staff access, survey ownership, messaging and the contact details provided to respondents.

For the latest guide, return to the product website. The examples there use fictional data and do not submit research responses, messages or bookings.