



TRIPS

Surveys

Auto-dispatch post-trip surveys, send them manually from any trip, and read results in the dashboard.

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On this page

- [Auto-dispatch \(recommended\)](#)
- [Manual send](#)
- [Where to see results](#)
- [Designing the survey form](#)
- [Common questions](#)
 - [Can I send surveys mid-trip instead of after?](#)
 - [What happens if a traveler does not respond?](#)
 - [Are responses tied to a specific traveler?](#)

Post-trip surveys close the feedback loop with travelers and feed your testimonials, NPS, and operations improvements. Trips can auto-dispatch them at a configurable offset after each trip ends, OR you can send them manually from any trip.

Auto-dispatch (recommended)

Settings → Surveys configures the per-agency auto-send. Every option:

- Default survey form — which survey-kind form to send (must be Published)
- Email template — optional pre-written body. Leave blank for the default "Welcome home" copy
- Anchor — what date to count from. Today the only anchor is trip_end_date
- Offset days — how many days after trip end to wait before sending (1 = the next day)
- Send hour — the hour of day to send, in the agency timezone
- Recipient mode — all_travelers, or just the primary
- Auto-send enabled toggle — the master on/off

The cron runs hourly. Every run, it scans for trips whose end date + offset days have just been reached, checks the configured send_hour against the agency timezone, and dispatches one email per recipient with a unique tracking token. That per-recipient token is what powers attribution on the Surveys dashboard.

Manual send

Open any trip → + Create → Send Form. Surveys now appear alongside regular trip-attached forms with a small violet "Survey" badge so you can tell them apart. Manual sends:

- Use the email composer like any other form send — you write the subject and body, the "Open the form" button is appended automatically

- Currently do not show up on the /surveys dashboard (the dashboard reads from survey_sends rows, which only the auto-dispatch path writes today)
- Generate the same form share URL for every recipient on the trip — responses can be identified only via portal sign-in OR by name/email fields in the form itself

Where to see results

/surveys is the agency-wide results dashboard. Filter by survey, time range, and traveler. NPS and star-rating questions auto-aggregate into trend charts; free-text answers stack as a scrollable feed.

Designing the survey form

Surveys are just forms with kind=survey. Build them in Forms → New form → set Kind to Survey before publishing. Recommended question types:

- nps_score — for a single Net Promoter Score question
- star_rating — for category ratings (ship, ports, group events, etc.)
- radio — for met / exceeded / fell-short style multiple choice
- textarea — for open-ended best-thing / worst-thing prompts

Common questions

Can I send surveys mid-trip instead of after?

Manually, yes — just hit Send Form whenever. Auto-dispatch only fires on trip_end_date today; mid-trip anchors are on the roadmap.

What happens if a traveler does not respond?

Nothing automatic today. Trips does not yet send reminders. Survey reminder cadences are on the roadmap.

Are responses tied to a specific traveler?

On the auto-dispatch path, yes — each recipient gets a unique token. On manual sends, only if (a) the form has name/email fields the traveler fills in, or (b) the traveler is signed into the agency portal when they open the link.