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An Overview of wcQues

wcQues is a program designed to allow you to create questionnaires. Questionnaires allow you to gather information from your callers. This can be voluntary, by using the Questionnaire menu, or you can require them as a part of a wcCode program. You can use the information to learn what your callers want, get feedback about current issues, allow online order entry, or even survey the demographics of your user base.

You can change a caller's security profile, change the expiration date, add credits or subscription balances automatically with questionnaires.

The Command Menu

Command menus are groups of commands that are grouped logically to perform most tasks and access features of *wcQues*. Each of these commandsprovide the basis for the most commonly used functions of a BBS.

File

New opens wcQues in a new, unnamed file. Create new questionnaires from this command.

Open opens an existing questionnaire file.

Save saves the current questionnaire file. If the file is already named, saves changes to the file. If this is a new file, you will be prompted for a file name.

Save as saves changes to an existing file by renaming it. Changes to the original will not be saved.

Print prints the currently active questionnaire.

Print preview displays a "thumbnail sketch" of the data to be printed.

Print setup pops up the Print Setup dialog box, allowing you to set your printer options.

Exit closes wcQues, prompting you to save any changes.

Edit

Undo removes the last action performed.

Cut removes the highlighted question from the questionnaire and places it on the clipboard.

Copy copies the highlighted question to the clipboard, but leaves the original intact.

Paste copies information from the clipboard to the cursor position.

Insert inserts a new question into the list.

Delete removes a marked question from the list.

View

Toolbar toggles the toolbar view on and off. When View Toolbar is enabled, a checkmark appears beside it and the toolbar is visible.

Statusbar toggles the statusbar view on and off. When View Statusbar is enabled, a checkmark appears beside it and the statusbar is visible.

Help

Help Topics displays the wcQues help files.

About displays information about wcQues and Mustang Software, Inc.

The Main Editing Area

This is where you begin when you are ready to create and edit the questions in your questionnaire.

Command menu

Lets you access the menu commands by selecting the appropriate <u>menu</u> and command, for example,

File/New.

Icon menu

Lets you use toolbar shortcuts to perform common tasks.

Questionnaire title

The name of the questionnaire appears at the top of the screen. If this is a new questionnaire, "Untitled" will be displayed.

Action type

The number, type, and prompt of each action are listed below the title of the questionnaire in the main screen.

Assign Action

Display Action

End Action

Goto Action

Goto Action

Hangup Action

Select Action

Transfer Action

The **End** action ends the questionnaire. There are no options available for End.

The Edit Question screen

Thie	ecroon is where	vou will actually	v create and	define how	vour augetione s	appear to the calle	۵r
11115	SCIECTI IS WITHER	you will actually	y citalt allu	ueille How	your questions a	appear to the call	JI.

Select the appropriate action to take. select, or end.	These actions can be assign,	display, goto, hangup, question, t	transfer,

The **Assign** action type lets you assign a specific action to be taken, regardless of the caller's input. You can use an assign to change the user settings, similarly to the "Change User field" option in earlier versions of *Wildcat!*

Source: Select the source information you want the caller to enter from the drop down list, or enter your own variable source to enter by placing a \$ (dollar sign) at the beginning of the variable to be assigned.

Destination: Select the destination for the information your caller is entering from the drop down list, or enter your own variable destination by placing a \$ (dollar sign) at the beginning of the variable to be assigned. For instance, you could enter a temp variable to some action that you are using somewhere else in the system, but do not want the user response to change the this original value.

Next action: Select the next action to be taken from the list of actions available.

The caller does not see any action taken by the assign type. Note that no prompt, color, or display macros are available through this action type.

This selection repeats the currently accessed action. as the next action will repeat the current choice.	For example,	if the current type	is a choice, selectin	g default

The Display action type lets you display text or a display file to the caller without requiring a response. Type in the text to be displayed, and add any colors or display macros.

Your selection of the next action to be taken will determine the next question that the caller sees.

The Goto action type takes the caller to another question. You can select the next action for this type from the drop down box. No prompt, color, or display macros are available through this action type.					

Disconnects the caller without further prompts.

The Question action type is the standard question type. You can add or change all options from this property sheet. Add color and display macros, select the next action type, add or change the question prompt, etc.

For very long or complex questionnaires, you may want to jump to another questionnaire (like Questionnaire, Pa 2). Enter the questionnaire to transfer to, or use Browse to select a file.	art

Select action is used when you want to give your caller a group of possible responses to select from. You can add as many choices as you'd like to the selection list, using the **Add** command.

If none of the selections are entered, the question defaults to a re-display of the current list of choices.

Editing Options

Depending on the action type chosen, you will see certain options for each action type. These options let you handle your caller's information with flexibility and ease. Note that the only action types your caller will see are **Question** and **Display**.

The End action tells <i>wcQues</i> that the questionnaire has ended. <i>wcQues</i> then accepts no more actions, and releases the caller back to the menu.					

If you are selecting a type for a **Display** action, you can select from Display text or Display file.

To **display text**, type the text you want the caller to see in the Prompt section. **Display file** gives you the option to select a display file to show the caller. To select your display file, click **Browse** and select the display file you want the caller to see from the list of available display files.

If you are selecting a type for a Question action, you can make your selection from the drop down box. This includes most user fields, as well as a temporary string variable selection.

Click **Browse** to see a list of available questionnaire files to transfer your caller to.

When you use the Select action type, you can give your callers a list of options to select from. These area added in the section of the properties sheet that appears once **Select** is selected.

This is one of the choices that the user can select. Each possible choice is a value.

Displays the action type and text associated with this choice.

Moves the cursor up (toward the top)the list of choices.

Moves the cursor down (toward the bottom)the list of choices.

Edits the marked selection.

Adds a new choice selection to the list.

Copies the marked item and adds it to the selection list. It can then be edited if necessary.

Deletes the item from the selection menu.

You can select the destination for the response by selecting from the drop down box.

Select the next action to be taken after the proper response is made to the current action. This can be a jump to another question, a display file, or an Assign. You can even have the questionnaire automatically hang up on the caller.

Applies your current selections without closing the edit window.

Launches the online help system (this file).

This is the question you want the user to see. Select the <u>color</u> , add any <u>display macros</u> s you might want, and typ your question here.	Э

Select any display macro that you want to apply to the question. When you select a display macro, it will appear at the beginning of the question or the current cursor position. (You'll see it in the <u>Prompt</u> section.) Most of the display macros are self explanatory, but if you need further explanation for them, refer to the section on display macros elsewhere in Wildcat! 5 Help.

{button ,JI(`WCQUES.HLP', `IDH_Display_macros')} Display macros

Display macros

If you are not sure exactly what the display macro displays, refer to the main Wildcat! 5 help. You may also want to use the Wildcat! 5 help files to learn more about user-defined display macros.

BAUD USER.ADDRESS1

CLS BELL
DAYOFWEEK DATE
NODE MODEM

SECURITY.DISPLAYFILENAME SECURITY.DAILYTIMELIMIT

SECURITY.DOWNLOADKBYTESRATIOLIMIT SECURITY.DOORSUSPROFILENAME SECURITY.EXPIREDATE SECURITY.DOWNLOADRATIOLIMIT

SECURITY.FAILEDINFOACTION SECURITY.EXPIREDNAME

SECURITY.MAXDOWNLOADKBYTESPERDAY SECURITY.MAXDOWNLOADCOUNTPERDAY

SECURITY.NAME SECURITY.MENUDISPLAYSET
SECURITY.UPLOADTIMECREDIT SECURITY.PERCALLTIMELIMIT
SUB1 SECURITY.BIRTHDAYINTERVAL

SUB3 SUB₂ SUB5 SUB4 SUB7 SUB6 SUB9 SUB8 SUBNUM2 SUBNUM1 SUBNUM4 SUBNUM3 SUBNUM6 SUBNUM5 SUBNUM8 SUBNUM7 SYSTEM.BBSNAME SUBNUM9

SYSTEM.SYSOPNAME SYSTEM.FIRSTCALL

TOTALCALLS TIME

TOTALFILEAREAS TOTALCONFERENCES

TOTALMESSAGES TOTALFILES USER.ADDRESS2 TOTALUSERS

USER.BIRTHDATE USER.ALLOWMULTIPLELOGINS USER.CHATAVAILABLE USER.CANREADPRIVATEMAIL

USER.COMPANY USER.CITY

USER.COUNTRY USER.CONFERENCE

USER.DOWNLOADKBYTESTODAY USER.DOWNLOADCOUNTTODAY

USER.EDITOR USER.DOWNLOADS

USER.EXPIREDATE USER.ERASEMOREPROMPT

USER.FIRSTCALL USER.FILEDISPLAY
USER.FROM USER.FIRSTNAME
USER.HOTKEYS USER.HELPLEVEL

USER.LANGUAGE USER.ID
USER.LASTCALLDATE USER.LA

USER.LASTCALL
USER.LINESPERPAGE
USER.LASTNEWFILES
USER.MINUTESLOGGED
USER.MENUCLEARSCREEN

USER.NETMAILBALANCE USER.MSGDISPLAY USER.PHONENUMBER USER.PACKETTYPE **USER.QUOTEONREPLY** USER.PROTOCOL USER.SECURITY USER.REALNAME USER.SECURITY10 USER.SECURITY1 USER.SECURITY3 USER.SECURITY2 USER.SECURITY5 USER.SECURITY4 USER.SECURITY7 **USER.SECURITY6** USER.SECURITY8 **USER.SECURITY9** USER.SORTEDLISTINGS **USER.SEX** USER.SUBSCRIPTIONBALANCE **USER.STATE**

USER.TIMELEFTTODAY USER.TERMINALTYPE USER.TITLE USER.TIMESON

USER.TOTALUPLOADKBYTES USER.ZIP

USER.UPLOADS

USRE.MSGSWRITTEN

VERSION USER.NAME

Click **Color** or select a color display macro to change the $\underline{\text{color}}$ foreground and background of your question. To enter your selection into the question prompt, you must click on .

USER.TOTALDOWNLOADKBYTES

Click on the color you want to appear with the question. The foreground/background combinations appear to the right of the color palette.

Applies the selected color combination to the question.

Question types

Select the type of responses required by the user. These choices are self-explanatory.

The Choice selection adds another dialog box. You can offer your callers a list of choices to respond from.

Editing Choice Responses

When you are editing a Choice-type question, each response can only be routed to a different question by using the Select action type to enter the information and assigning a GoTo value to it. When you select $\underline{\text{Choice}}$ as the type of question, you must add the branches that the caller will see.

Question action options

These are the option types available for selection when editing or creating a Question action type.

AMEX Choice Date Discover Editor End Help File Display Language Mastercard Msg Display None Packer Phone Numeric Sex SS Protocol Terminal Type State Text Visa13 Visa 16 Time Yes/No

This is the minimum number of characters allowed for a text or numerical response.

This is the maximum number of characters allowed for a text or numerical response.

These are the $\underline{\mathsf{user}}$ fields that can be updated according to the caller's answer to the question. These fields are defined in the caller's User Settings.

User Fields

Comment Line 1Comment Line 2Comment Line 3Comment Line 4Comment Line 5CompanyComputerCountryCityData phoneFAX phoneFromNoneAddress Line 1Address Line 2

None Address Line 1 Address Line Password State Abbreviation Zip Code

Pops up the Open dialog box, allowing you to select drives, directories, and files.

Destination fields

These are the selections available as Destination fields:

Address1 Address2 All Attachments Allow Multiple Logins Bell at logon Birthdate Can read private mail City Comment1 Comment10 Comment2 Comment3 Comment5 Comment4 Comment6 Comment7 Comment8 Comment9 Conference Company Computer type Downloads Country Data number Editor Erase more prompt Expire date FAX number File Display From Help level Hang up after upload Hot keys Language Lines per page Locked out

Max attachment size Max messages per conference Max messages per packet

Memo dateMemo clear screenMessage displayNet balanceNever deleteNo private export

None Packet type Packer Password Phone number Protocol Quote on reply Real name Script prompts Security1 Security10 Security2 Security3 Security4 Security5 Security6 Security7 Security8

Security9Send from youSend new bulletinsSend new filesSexSorted listingsStateSubscription balanceTerminal type

Time left today Title Total download Kbytes

Zip \$tempvar

Closes the Edit Question screen and saves any changes.

Closes the Edit Question screen and discards changes you have made.

Inserts a new question into the questionnaire.

Deletes the highlighted question from the questionnaire.

Changing a questionnaire

Wildcat! 5 provides a NEWUSER questionnaire. When you complete installation, you may see it. This questionnaire is a standard format, and asks users for personal information, which is then entered automatically into the user database files. You can change the questionnaire to suit your individual needs. Any questionnaire can be changed.

To change your questionnaire:

- 1. Open the questionnaire file to be modified. The questionnaire is opened, and displayed for you, ready to edit.
- 2. Select the question you would like to change, and double-click on it or click once and then press **ENTER**.. The Edit Question dialog box is opened.
- 3. From this dialog box, you can edit the entire question or any part of it any way you'd like.

You can use **Edit/Insert** or the **Insert Question** icon on the toolbar to add questions, and **Edit/Delete** or the **Delete Question** icon on the toolbar to remove questions.

Types of questionnaires

There are four basic types of questionnaires: newuser, closed BBS, date sensitive, and generic. Three of these are predefined, and will execute automatically if *Wildcat!* finds them in your Questionnaire directory.

The predefined questionnaires are provided and already in your questionnaire directory (usually C:\WILDCAT\QUES). These questionnaires are <u>QUESNEW</u>, <u>QUESCLOSE</u>, and <u>QUESDATE</u>. Generic questionnaires are created by the sysop. These generic questionnaires (QUES1 to QUES9999) are created by the sysop. You can create as many questionnaires as you want. There are no restrictions on what you can name your questionnaire file, or how many you can have.

QUESNEW

This is the new user questionnaire. *Wildcat!* will automatically run this questionnaire for a user logging on for the first time. The user is asked for personal information, such as name, date of birth, and phone number. He may also be asked to select his preferences in editor, protocol, screen display, etc.

You can use this information to update the user settings, and even upgrade the caller's security level.

QUESCLOSE

This is the questionnaire for closed BBSs. If you have set the security to Closed in MakeWild (set Newuser access to system to Closed), this questionnaire will run automatically when a new user calls in for the first time. You can then use this information to add the user to the userbase.

QUESDATE

This is a date-sensitive questionnaire. It will run just after the caller enters his name and password, but only if the filedate is newer than the caller's last logon date. This is a good way to have all users answer this questionnaire, but only once.

Create a new questionnaire

Once you have <u>planned</u> your questionnaire, it's time to create a new questionnaire. In Explorer go to your *Wildcat!* root directory, find and double click on *WCQUES*.EXE, change to your *Wildcat!* home directory and type

WCQUES [ENTER]

Or, if you have created a shortcut, click your shortcut icon. wcQues launches with a new questionnaire screen ready to be created.

1. Double click on the first question. The Editing Question # property sheet appears.

Select the action type you want to create, and enter the options for that action. Each action has its own set of options:

Assign

Source - Enter the source of the data to be assigned.

Destination - Select the destination for the information. This is what you want to ASSIGN the data to.

Next action - sends the caller to a designated action.

Display

Display macros -If desired, any display macro can be entered into the display.

Colors - If desired, any color code (both standard and user defined) can be entered into the display.

Prompt - This is the actual text that will you want to appear to the caller.

Type - Select display text or display file. You can display a file to your caller, or type in the text to be displayed.

Next action - sends the caller to a designated action.

Fnd

Unless you have selected a Transfer or Hangup action, this is the last action to take. The End action lets *wcQues* and Wildcat! 5 know that the questionnaire is complete.

Goto

Next action - sends the caller to a designated action.

Hangup

Hangup has no options. This action disconnects the caller immediately.

Question

Display macros - If desired, any display macro can be entered into the question.

Colors - If desired, any color code (both standard and user defined) can be entered into the question.

Prompt - This is the actual text that will you want to appear to the caller.

Type - Select the type of response that you want from your caller.

Destination - Select the destination for the information.

Next action - sends the caller to a designated action.

Select Source - Enter the source for the selection information.

Value - Each selection option you add will appear as a selectable VALUE.

Result item - This is the result of your caller makes this selection.

Add - lets you add options for the caller to select from. Any action may be a selection.

Transfer

Select the questionnaire file to transfer the caller to. Use browse, or type the path and filename in.

- 2. To change the color of a prompt, click on the Color icon, select a color from the color palette and click **OK**, or type a user defined macro right into the prompt. The display macro for that color scheme appears.
- 3. Repeat this procedure for each action taken to create your questionnaire. Click the Add icon, or select **Edit/Insert**. A new action appears.
- 4. The last question must be a specific one. Add one more question, and select End as the type. This lets *wcQues* that you are finished, so that it can end the questionnaire.
- 5. Save your new questionnaire, and select a folder to store it in. Select **File/Save**, and enter a filename. Questionnaires can have any name you'd like, but must be saved with the .DAT extension. Click **OK** to accept your selections.

An example questionnaire

With the flexibility of *wcQues*, you can create questionnaires that range from very simple to very complex. Here is an example of a simple questionnaire, designed to survey the callers' preferences.

- 1. Double click on the first question. The Editing Question #1 property sheet appears. For our example, we'll make the first action a display.
- 2. Select **Display** for the action type, then Display text for the Options type. We'll type in an introduction in the Prompt field. In our example, we've typed in
- 1. Let us know how to make our BBS better. We value your opinion.
- 3. When you are satisfied with your entry, click OK. Don't worry about setting the Next action just yet. Default appears in the textbox. The Default setting tells the next action to go to the next action on the list.
- 4. Click the **Insert** icon. A new action appears. We'll add a question here. Select **Question** for the action type.
- Let's change the color of this question. Click Apply new color and select a color from the color palette. (We've selected blue.) Click OK. The display macro for that color scheme appears. Now, type in your question. We'll use

What is your main reason for calling this BBS?

Notice that we've added the display macro

user.firstname

to the end of the prompt.

- 6. Select the **Option** type. We'll use **Choic**e, and enter a destination for the information. Select a destination for the response, or type one in yourself, using a "\$" (dollar sign) in front of your entry. We'll select Comment1 as the destination. Accept the default setting for next action, and click **OK**.
- 7. Tab to the **Choices** sheet, and select **Add**. The **Edit choices** dialog box appears. Enter the value for the choice. This is the answer expected by *wcQues*.
- 8. Type in the prompt as you want it to appear to the caller. We've added the choices Computing, Sharing files, Games, E-mail and Other. Each choice must be added separately.
- 9. Next, we'll add another question. Add another action and select **Question**. Type in the prompt. We've used: What would you like to see added to this BBS?
- 10. For our type, let's use **Text**. Select that from the dropdown list. Two additional fields are required when using a text type. Enter the minimum and maximum number of characters allowed for the response.
- 11. For **Destination**, select **Comment2**.
- 12. Let's add another question. Click the **Insert** icon, and add the next action. Select **Question**, and type in your prompt text. We've chosen

Does this BBS offer enough files and messages about your interest?

- 13. For the type, select **Choice**. We've made the destination for this question **Comment3**. Tab to the **Choices** sheet. Add the choices **Yes** and **No**. Enter the value, prompt, and destination for each. When you are satisfied with your selections, click **OK**.
- 14. We've added another Choice question type:

Would you be interested in being a conference sysop?.

- 15. The next question asks for the caller to enter his phone number, using Comment 4 as a destination, because we *don't* want to change his user record field. If we did, we would have selected **Phone number** for the destination.
- 16. Now, we have displayed the message

This information will be kept confidential.

to the caller by adding another action, and making it a Display type.

We want to give the caller a chance to express his opinion, so we've added a question that gives up to 100 characters for the caller to type in his feedback.

Using the **Assign** action, we've copied his answer to a new user record field, **Opinion**.

17. One more display, just to thank the caller for his time. Add a **Display** action, and type in your text. We've used

Thank you for taking the time to give us your thoughts.

- 18. The last action we have chose is **End**. Unless you are using the **Transfer** action to send the caller to another questionnaire, or disconnecting the caller using a **Hangup** action, select **End** as the type.
- 19. Select File/Save, and enter a filename. We've chosen OPINION. Click OK.

Inserting questions

To insert a question, position the cursor on the line below the line where the new question is to be. Press **Ctrl+I** to open up a new line above the cursor position. The <u>Edit Question</u> box pops open, allowing you to add your new question. You can also press the **Insert Question** icon. on the toolbar.

Deleting Questions

To delete a question, mark the question to be deleted and press the $\bf DEL$ key, or click the $\bf Delete$ $\bf Question$ icon on the toolbar.

Editing multiple branches

A <u>Choice</u> type question can have as many options as you want it to have. When you select Choice, you will see a new Choices page appear behind the Edit property sheet. Use this second property sheet to add your choice options. Click **Add** to add new choices.

Saving and loading a questionnaire

To open a questionnaire for editing using a DOS command, you can type in the filename when you open *wcQues*. For example, to open QUES1, you would type:

WCQUES QUES1

at the DOS prompt.

To start a new questionnaire, click the **New** icon on the toolbar, or select **File/New**.

Tying it all together with wcMenu and wcDraw

You need to use *wcMenu* to add your questionnaires to the menu. Add a **Run Questionnaire** command to display the questionnaire menu, and the users can then select the questionnaire they want to answer.

Refer to *wcMenu* help for detailed help on creating menus.

Reading the answer files

Answers are saved in plain ASCII text, with the caller's name at the beginning of each session. Answers are recorded beginning with the question number, so you can see which answer goes with which question. New questionnaire sessions are stored at the end of the answer file.

You can print the answer files or display them on your screen using a text editor. Using the data to update user record or accounting and database applications.

Be sure to update or delete records occasionally. You can zip older files if you want to keep an archive.

Confirm your selections and continue editing items in this window.

Clears the window and opens a new, untitled file for input and editing.

Confirm your selections and close the current window.

Writes the current file to disk, overwriting the original version of the file. To rename the file without overwriting the original, use the $\bf Save \ As$ command.

Opens a dialog box prompting you for the drive, path and name of the file you wish to open for viewing or editing. You will be prompted to save any changes to the previous file you were working on before the old file is closed.	

Pops up the help files for a specified topic.

The question the user sees

When you type a question into the edit question \underline{prompt} area, you will see it appear in the textbox above it. The way it appears in this textbox is what the caller will see.

Planning your questionnaire

Before you create your questionnaire, you should have clearly in mind what types of questions you want to ask, and what <u>information</u> you are looking for from your callers. Keep in mind the overall theme of your BBS, the type of callers you have, and your goal.

It might be a good idea to sit down and write out your basic outline, look, and plan for the new questionnaire before actually beginning to create it. You may also want to consider whether you want to make the questionnaire mandatory or not, and what to do with the information you receive.

Your questionnaire should have a clear purpose, a good, easily understood flow, and be well worded. Spending some time on your questionnaire early will give you a cleaner, more comprehensive questionnaire once you actually create it.

How wcQues works

wcQues uses action types to create truly flexible questionnaires. Instead of just creating questions, you have a choice of actions. One of these actions is an actual question, but you can choose to create an Assign action, a Display action, a Good action, a Hangup action, a Transfer action, an End action, or a Select action as well.

The caller only sees the Question and the Display actions. All other actions are behind-the-scenes.

You <u>create</u> questionnaires by defining the type of action you want and setting the options and properties that you want each action to have. This gives you the ability to make changes to the user settings, log the caller off, or get information from your caller, all automatically.

When you open wcQues, a default untitled questionnaire is displayed edit, the selected questionnaire is displayed in this text area.	. Once you have selected a questionnaire to

Moves the selected item one place up on the list.

Moves the selected item one place down on the list.

\$ Edit button Opens the Edit dialog box, allowing you to edit the properties of this item.

Copies the selected item.

Deletes the selected item.

All prompts for this choice are displayed. Add or edit all choices you want your callers to see for this question. A Choice type question can have as many options as you want it to have.						

Each selection option you add will appear as a selectable VALUE. This is the answer expected by wcQues.

Adds the currently selected display macro at the cursor position.

Launches the online help system.

This option activates the User-Defined color display macro color palette.

This option activates the **Standard Colors** color palette.

Select the source information you want the caller to enter from the drop down list, or enter your own variable source to enter by placing a \$ (dollar sign) at the beginning of the variable to be assigned

Select the destination for the information your caller is entering from the drop down list, or enter your own variable destination by placing a \$ (dollar sign) at the beginning of the variable to be assigned. For instance, you could enter a temp variable to some action that you are using somewhere else in the system, but do not want the user response to change the this original value.

Each response can only be routed to a different question by using the Select action type to enter the information and assigning a GoTo value to it. When you select **Choice** as the type of question, you must add the branches that the caller will see.