

Working with Forms & Surveys

Agenda

- Overview of GrowthZone Forms/Surveys
- Creating Forms
 - Adding Sections
 - Adding Questions
- Distributing Your Form
 - URLs
 - Pre-fill form fields
- View Responses
 - Associate Response to Contact
 - Download all Responses
- Form Response Report



Forms/Surveys Overview

- The **Forms/Surveys** module enables you to quickly create and publish custom web forms and surveys
 - Send targeted surveys to members and visitors
 - Collect important survey data
 - Store information gathered within a contact's profile
 - Upload documents
 - Render the data in easy to understand/useful ways

Best Practice

What information should be collected?
What is the reason we want this data?

- Keep it short and simple.
- Test and time it right.
- Promote it.
- Share the results.

Edit Form Questions - Job Postings Public Submission

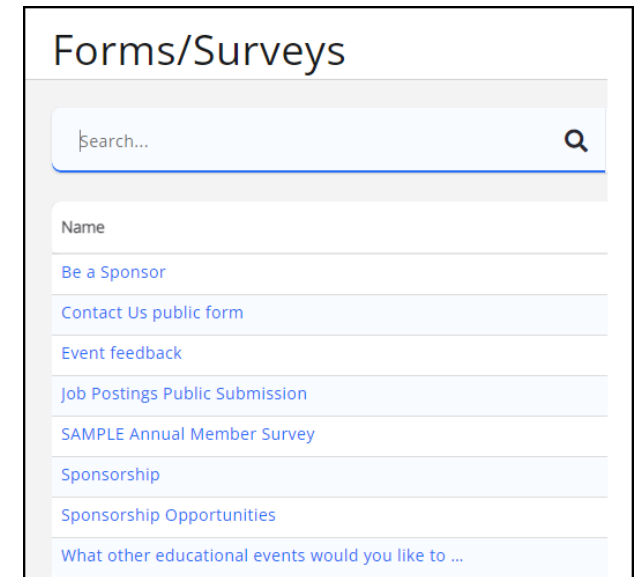
Define Questions/Fields

	Name	Section
↑	Content Item - First and Last Name	
↑	Content Item - Email Address	
↑	Content Item - Phone Number	
↑	Content Item - Job Type	
↑	Content Item - Education Level	
↑	Content Item - Experience Level	
↑	Content Item - Job Function	
↑	Form - Salary Range	
↑	Form - Job Description	Job Requirements

Examples

1. Membership Satisfaction Survey
2. Information Gathering
3. Scholarship Applications
4. Informal Voting
5. Interest Survey

BONUS! Update a list/committee using form responses and a SMART list!



The screenshot shows a web interface titled "Forms/Surveys". At the top, there is a search bar with the placeholder text "Search..." and a magnifying glass icon. Below the search bar, there is a list of forms and surveys, each with a "Name" label and a corresponding link. The items listed are: "Be a Sponsor", "Contact Us public form", "Event feedback", "Job Postings Public Submission", "SAMPLE Annual Member Survey", "Sponsorship", "Sponsorship Opportunities", and "What other educational events would you like to ...".

Creating a Form

Creating a form is a two-step process:

1. Add the form
2. Add the questions to your form

KB: [Create a Form](#)

The image shows two overlapping screenshots of a software interface. The top screenshot is titled 'Add/Edit Form/Survey' and contains the following elements:

- Name***: A text input field with the placeholder text 'Form Name'.
- Description ⓘ**: A rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, link, unlink, text color, background color, bulleted list, numbered list, indent, and outdent.
- Form Type * ⓘ**: A dropdown menu currently showing 'User defined'.
- Form URL**: A text input field.

The bottom screenshot is titled 'Edit Form Questions - Annual Conference 2020 Survey' and shows a table for defining questions/fields. It includes two buttons: 'ADD NEW QUESTION/FIELD' and 'MANAGE SECTIONS'.

	Name	Section	Page Number	Actions
↑	Form - First Name	Overall Information	1	⋮
↑	Form - Last Name	Overall Information	1	⋮

Creating a Form

- **Form Type**

- **Contact Us** form type, staff subscribed to Contact Us Submission email notification will be notified
- **Inquiry Tracking** the form will be used in the Sales Funnel inquiry tracking
- Select **User Defined** for all other forms/surveys

- **Publish Start/Publish End**

- These dates drive when the form will accept responses

Creating a Form

Accept User responses via 3rd Party Source

- Enable this option if you wish to receive form responses from a third party survey solution (for example, ActOn)
- This will setup the mapping needed to receive and store the responses in your database. When this is enabled, once the form has been saved, the **URL to Send Responses To** will be automatically generated - this is the URL that should be shared with the third-party solution

Creating a Form

Confirmation Options

- Configure the message you would like displayed in the browser after the survey is completed
- Include Files that can be downloaded after survey is completed

Confirmation Options

Post Submit Message

B *I* U ~~S~~ X₁ X¹ A ▼ T ▼ 🔥 ☺ 📄 ▼ ☰ ▼ ⏪ ⏩ ⏴ ⏵ ⏶ ⏷ ⏸ -

🔗 📧 📁 ↶ ↷ ↶ ↷ ↶ ↷ ↶ ↷ ↶ ↷ ↶ ↷ ↶ ↷

This is what users will see after clicking submit on the form.



Download File ⓘ

Create Sections

Add Sections to a Form

- To better organize the questions you wish to ask on your form, you can create sections
- Once sections are created, you can add custom questions to the specified sections

KB: [Add Sections to a Form](#)

Edit Form Questions - Annual Conference 2020 Survey < 1 of 18 >  

Define Questions/Fields ADD NEW QUESTION/FIELD MANAGE SECTIONS

	Name	Section	Page Number	Actions
↑ ↓	Form - First Name	Overall Information	1	⋮
↑ ↓	Form - Last Name	Overall Information	1	⋮
↑ ↓	Form - How was the food	Event Food	2	⋮
↑ ↓	Form - Please upload your favorite recipe	Event Food	2	⋮
↑ ↓	Form - Would you like to participate in committees	Event Food	2	⋮
↑ ↓	Form - What groups would you like to participate in	Committees	3	⋮

Cancel Done

Create Questions

Add Questions to Your Form

- You can create new fields, or select from existing fields
- Many “standard fields” have already been configured for you (i.e. Form - First Name)
- KB: [Add Questions to Form](#)

Add Form Custom Field

Use an Existing Database Field

Existing Database Field

Create a New Form Field

Name* [Ⓢ]

Description or Instructions

Field Type [Ⓢ]

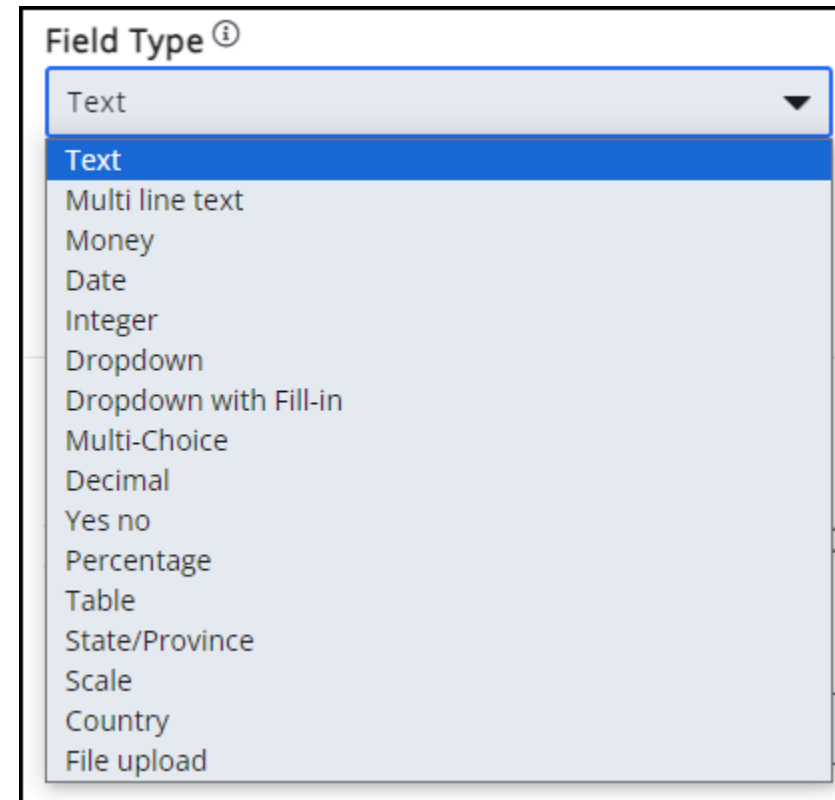
Characters Allowed

Create Questions: Custom Fields

Specialized Form Field Types

- Drop Down
- Drop Down with Fill In
- Yes No
- Upload File

- KB: [Specialized Form Field Types](#)




Create Questions: External Data Source

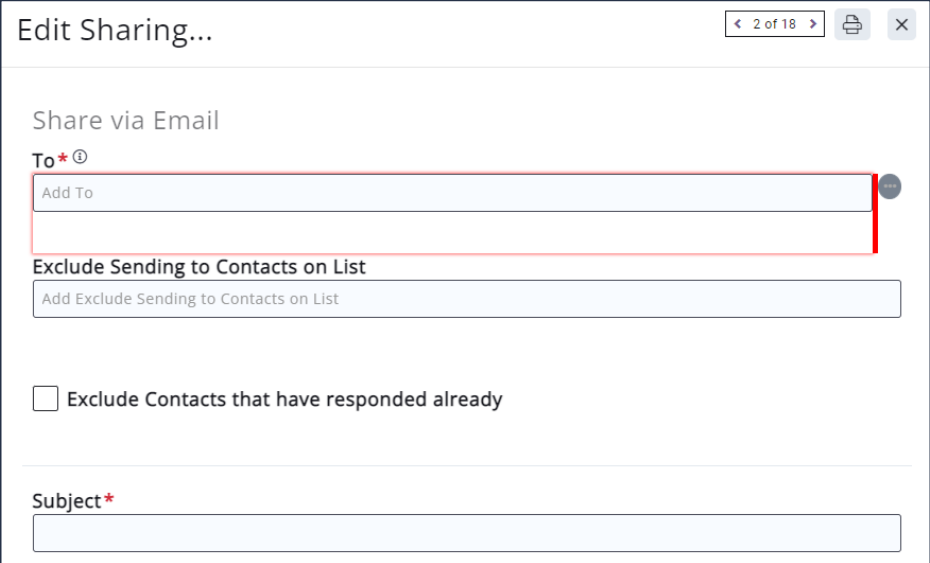
External Data Source API URL

- This option allows you to point to a list of the needed responses to the question. For example, if an FTC Code (Federal Trade Commission industry code) is needed, rather than using a drop-down list and manually populating all of the possible responses (which takes time, and introduces room for error), you can enter the needed API URL, which will point to the list of responses
- **NOTE:** When using an External Data Source API, the **Key Field Name** field ties the list to the custom field in your survey

KB: [Add Questions to a Form or Survey](#)

Share Form

- You can share the form by clicking the  icon – the system will automatically populate contact information
- For Example – you could easily send the form to all event attendees
- Edit the email as needed



The screenshot shows a window titled "Edit Sharing..." with a close button and a page indicator "< 2 of 18 >". The window is divided into sections for email sharing configuration:

- Share via Email**
- To* ①**: A text input field with the placeholder "Add To".
- Exclude Sending to Contacts on List**: A text input field with the placeholder "Add Exclude Sending to Contacts on List".
- Exclude Contacts that have responded already**
- Subject***: A text input field.

Share Form

- **Prefill Form Fields**

- To make it easy for respondents to fill in a form, when a form is sent using a GrowthZone email list, basic contact information can be pre-populated in the form

- To pre-populate the form, **?cid={{ContactId}}** must be appended to the Secure Form URL

- For Example:

- **<https://membermanagementtraining.growthzoneapp.com/ap/Form/Fill/GLWGVTmL>**

the format for pre-populating form fields would be

<https://membermanagementtraining.growthzoneapp.com/ap/Form/Fill/GLWGVTmL?cid={{ContactId}}>

- KB: [Prefill Form Fields](#)

Share Form

Once the form is generated, two URLs are available for sharing the form:

- **Form Url:** This URL should be used when you wish to link the form to your website and format using templates you have designed for your website
- **Templated Form Url:** This URL is created after you have integrated the form from the Web Pages area of GZ

Form URL

<https://cherissandbox.growthzoneapp.com/ap/Form/Fill/LqWnYHmp>

Templated Form URL

<https://cherissandbox.growthzoneapp.com/trainingform/Fill/LqWnYHmp>

View Individual Form Responses

KB: [View Individual Form Responses](#)

Member Information Update Survey Responses

Search... 🔍 ⚡ ⌵

Matched	From	Org	Created Date	Submission Date	Actions
Yes	A Place for Dogs		10/14/2021 3:23 PM	10/14/2021	⬇️
Yes	Henry LeMarc	Fritz	7/16/2020 12:43 PM	7/16/2020	⬇️
Yes	Anna Ranit	The Diner	7/10/2020 11:11 AM	7/10/2020	⬇️
Yes	Lois Laneson	The Knit Shop	7/10/2020 10:13 AM	7/10/2020	⬇️
Yes	The Knit Shop	The Knit Shop	7/10/2020 10:12 AM	7/10/2020	⬇️

⚙️ < 1 - 5 > TOTAL: 5

Need Help?

Associate Form Responses to Contacts

- You can associate a form response to a contact in your database, by clicking into the IP Address listed in the **From** column
- Include Form: First-Name, Form-Last-Name, Form-Organization or Form-Email Address in your survey to be provided with sufficient information to match the response to a contact in your database
- KB: [Associate Form Responses to Contacts](#)

Associate Form Responses to Contacts

Training Survey Form Responses

Search... 🔍 ⚡ ⚙

Matched	From	Org	Created Date	Submission Date	Actions
Yes	Billy Jones				⬇
Yes	Cheri Petterson	Fritz			⬇
No	136.49.121.149				⬇
No	136.49.130.204				⬇
No	68.170.127.199				⬇
No	68.170.127.199				⬇
Yes	Black Sheep				⬇

Edit Find or Create Contact

Entered Data

First Name: m Last Name: s

Email: msamuelson99@gmail.com Organization Name:

Potential Matches


Select Option Below For Contact Record

- Select Contact From Matches
- Find existing - Search your database
- Create New Contact

Person Name	Primary Organization	Last Communication Date	Email Address	Membership Status	Estimated Number Of Communications
<input type="radio"/> Tim Smith	Smith & Associates	10/28/2020	tim.smith@mailinator.com	Non Member	1

Select Option Below For Organization Record - if different than Primary Organization selection above

- Use suggested - We've found a possible match
- Find existing - Search your database



Need Help?

Download All Form Responses

KB: Download All Form Responses

Forms/Surveys ADD

Search... 🔍 ⚡ 🔼

Name	Form Type	Total Responses	Latest Response	Action
Annual Conference 2020 Survey	User defined	1	1/24/2020	⋮
Collin County Test Form	User defined	2	7/16/2020	⋮
Contact Us public form	Contact us	1	8/20/2018	⋮
Copy of Annual Conference 2020 Survey	User defined	<No Total Responses>		⋮
CP Training Form	User defined	2	9/28/2022	⋮
Greensboro	User defined	<No Total Responses>		⋮
Maui Member Satisfaction Survey	User defined	2	10/22/2020	⋮
Member Information Update Survey	User defined	5	10/14/2021	⋮

- ⚙ Edit
- 🔗 Share
- 📄 Download Form/Survey Responses
- ✖ Remove Form
- 📄 Copy Form

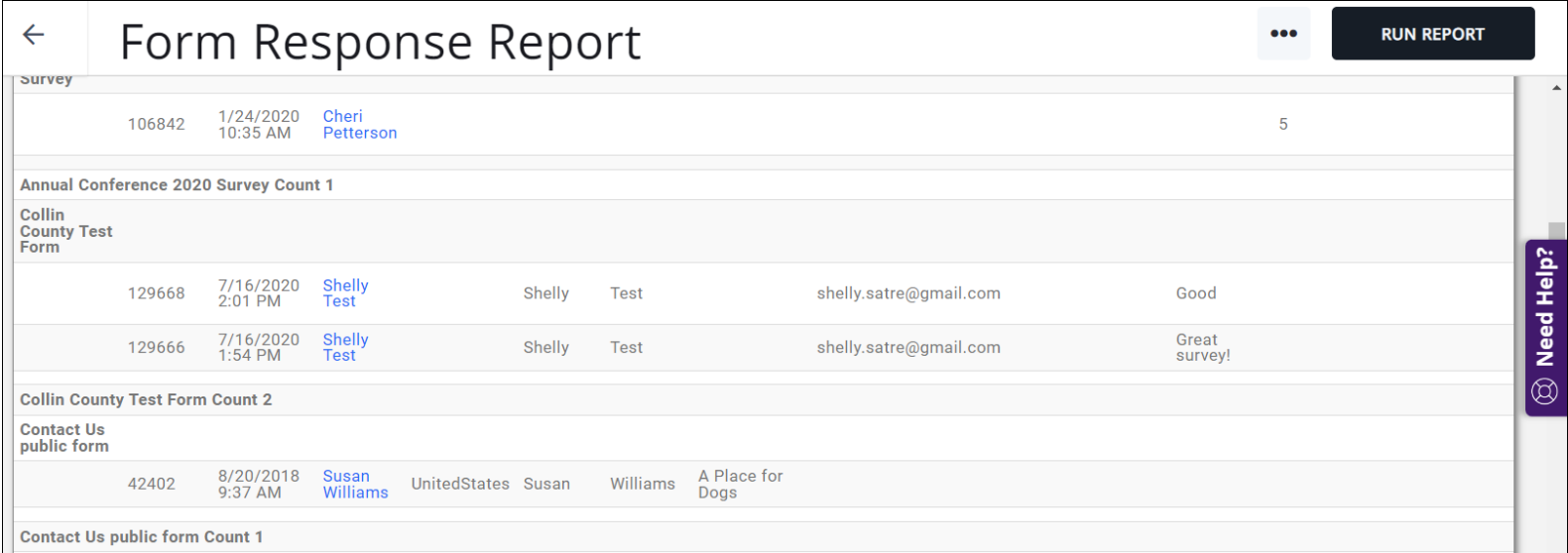
Need Help?

Form Response Report

The **Form Response Report** allows you to download responses for all forms or an individual form

KB: [Form Response Report](#)

KB: [Export Reports](#)



The screenshot shows a mobile application interface for a 'Form Response Report'. At the top, there is a back arrow, the title 'Form Response Report', a menu icon (three dots), and a 'RUN REPORT' button. Below the title, there are several sections of data:

- Survey**: A single row with ID 106842, date 1/24/2020 at 10:35 AM, user Cheri Petterson, and a count of 5.
- Annual Conference 2020 Survey Count 1**: A section header.
- Collin County Test Form**: A section header.
- Response 1**: ID 129668, date 7/16/2020 at 2:01 PM, user Shelly Test, email shelly.satre@gmail.com, and feedback 'Good'.
- Response 2**: ID 129666, date 7/16/2020 at 1:54 PM, user Shelly Test, email shelly.satre@gmail.com, and feedback 'Great survey!'.
- Collin County Test Form Count 2**: A section header.
- Contact Us public form**: A section header.
- Response 3**: ID 42402, date 8/20/2018 at 9:37 AM, user Susan Williams, location UnitedStates, and feedback 'A Place for Dogs'.
- Contact Us public form Count 1**: A section header.

A vertical 'Need Help?' button is visible on the right side of the table.

Questions?

Training and Support

Customer Service Hours:

Phone: 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)

800.825.9171, Option 4, then Option 2

Chat: 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)

7 a.m. – 4:45 p.m. CT (Friday)

Online Support Documentation: [GrowthZone Knowledge Base](#) »

Online Training Calendar: [Training Event Calendar](#) »

Live Chat: [GrowthZone Support Portal \(chat on far right\)](#) »