Working with Forms & Surveys

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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

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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

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Creating a Form

Creating a form is a two-step process:

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

KB: Creating a Form

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

Creating a Form

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

Creating a Form

Add Questions to Your Form

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

Creating a Form

Specialized Form Field Types
- Drop Down
- Drop Down with Fill In
- Yes No
- Upload File

- KB: Specialized Form Field Types

Creating a Form

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 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

Share Form

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

- **Public Form Url**: This URL should be used when you wish to link the form to your web-site and format using templates you have designed for your web-site
- **Secure Form Url**: This URL should be used when you wish to send the link via email, or other method. This will generate a basic form, without any formatting
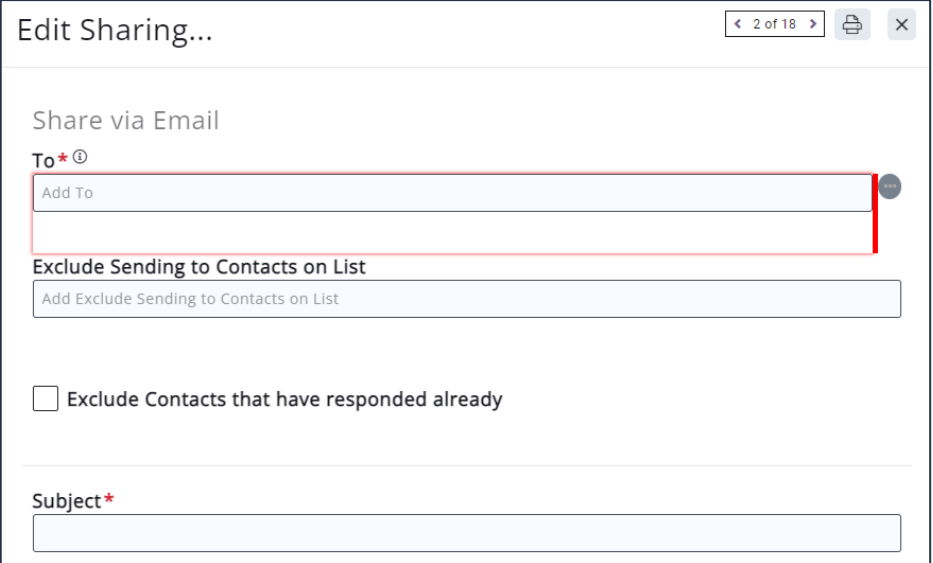
Form URL
https://cherissandbox.growthzoneapp.com/ap/Form/Fill/LqWnYHMp

Templated Form URL
https://cherissandbox.growthzoneapp.com/trainingform/Fill/LqWnYHMp

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...

Edit Sharing...   ‹ 2 of 18 › 🖨 ✕

Share via Email

To * ⓘ

Add To

Exclude Sending to Contacts on List

Add Exclude Sending to Contacts on List

☐ Exclude Contacts that have responded already

Subject *

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

View Individual Form Responses

KB: [View Individual Form Responses](#)

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 ◁ 10 of 19 ▷ 🖨 ✕

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 ⬍
○	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

▼

Download All Form Responses

KB: Download All Form Responses

Form Response Report

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

KB: Form Response Report, Export Reports

Questions?

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