

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

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 screenshot displays two overlapping windows from the GrowthZone software. The background window is titled 'Add/Edit Form/Survey' and contains fields for 'Name*' (with a placeholder 'Form Name'), 'Description' (with a rich text editor toolbar), 'Form Type*' (set to 'User defined'), and 'Form URL'. The foreground window is titled 'Edit Form Questions - Annual Conference 2020 Survey' and shows a table for defining questions/fields. The table has columns for Name, Section, Page Number, and Actions. Two rows are visible: 'Form - First Name' and 'Form - Last Name', both under the 'Overall Information' section on page 1. Buttons for 'ADD NEW QUESTION/FIELD' and 'MANAGE SECTIONS' are located above the table.

	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

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

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

Add Questions to Your Form

- 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

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Field Type ⓘ

Text ▾

Characters Allowed

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

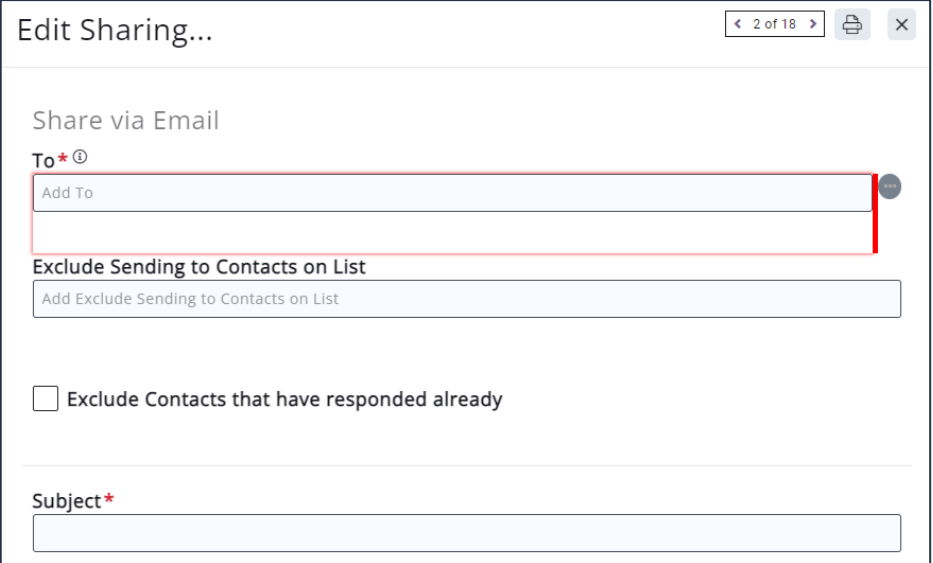
<https://cherissandbox.growthzoneapp.com/ap/Form/Fill/LqWnYHMP>

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...








The screenshot shows a window titled "Edit Sharing..." with a close button and a page indicator "< 2 of 18 >". The main section is "Share via Email". It features a "To" field with a red asterisk and a help icon, containing a text input with "Add To" and a red border. Below this is a section "Exclude Sending to Contacts on List" with a text input containing "Add Exclude Sending to Contacts on List". There is an unchecked checkbox labeled "Exclude Contacts that have responded already". At the bottom is a "Subject" field with a red asterisk and an empty text input.

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](#)

Member Information Update Survey Responses					
<div><div>Search...</div><div><div></div><div></div><div></div></div></div>					
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	
<div><div></div><div>< 1 - 5 ></div><div>TOTAL: 5</div></div>					

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

Q⚡Y

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
<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](#), [Export Reports](#)

Form Response Report

RUN REPORT

Survey

106842

1/24/2020
10:35 AM

Cheri
Petterson

5

Annual Conference 2020 Survey Count 1

Collin
County Test
Form

129668

7/16/2020
2:01 PM

Shelly
Test

Shelly

Test

shelly.satre@gmail.com

Good

129666

7/16/2020
1:54 PM

Shelly
Test

Shelly

Test

shelly.satre@gmail.com

Great
survey!

Collin County Test Form Count 2

Contact Us
public form

42402

8/20/2018
9:37 AM

Susan
Williams

UnitedStates

Susan

Williams

A Place for
Dogs

Contact Us public form Count 1

Need Help?

Questions?