

Working with your GrowthZone Forms & Surveys



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

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

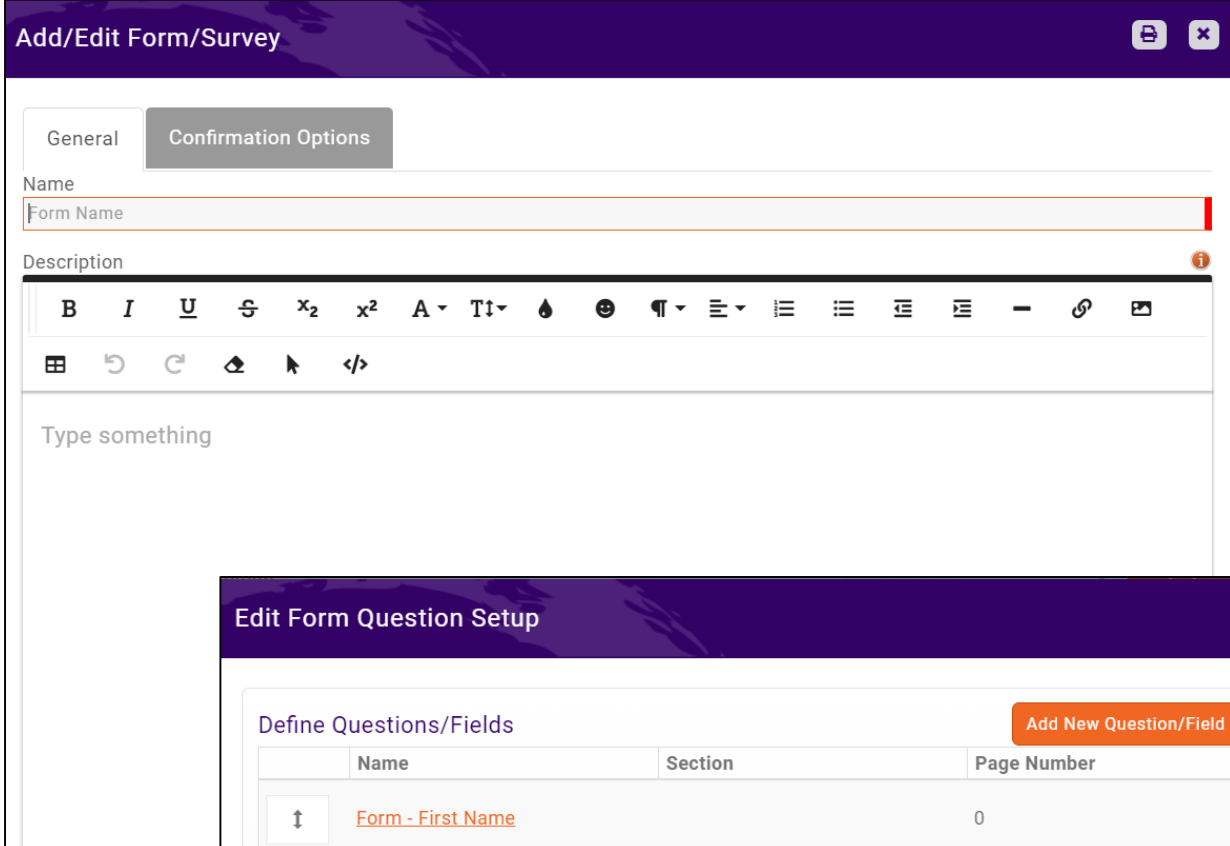
Creating a Form

Creating a Form

Creating a form is a two step process:

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

WIKI: [Create a Form](#)



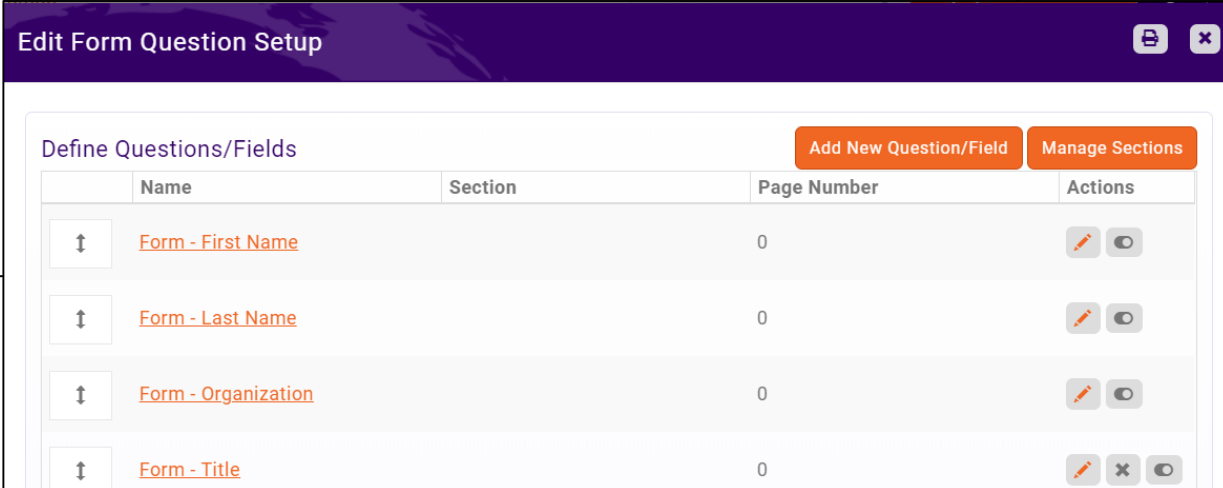
Add/Edit Form/Survey

General Confirmation Options

Name
Form Name

Description

Type something



Edit Form Question Setup

Define Questions/Fields

Add New Question/Field Manage Sections

	Name	Section	Page Number	Actions
↑ ↓	Form - First Name		0	✎ ⏻
↑ ↓	Form - Last Name		0	✎ ⏻
↑ ↓	Form - Organization		0	✎ ⏻
↑ ↓	Form - Title		0	✎ ✕ ⏻

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

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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























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

General Confirmation Options

Post Submit Message

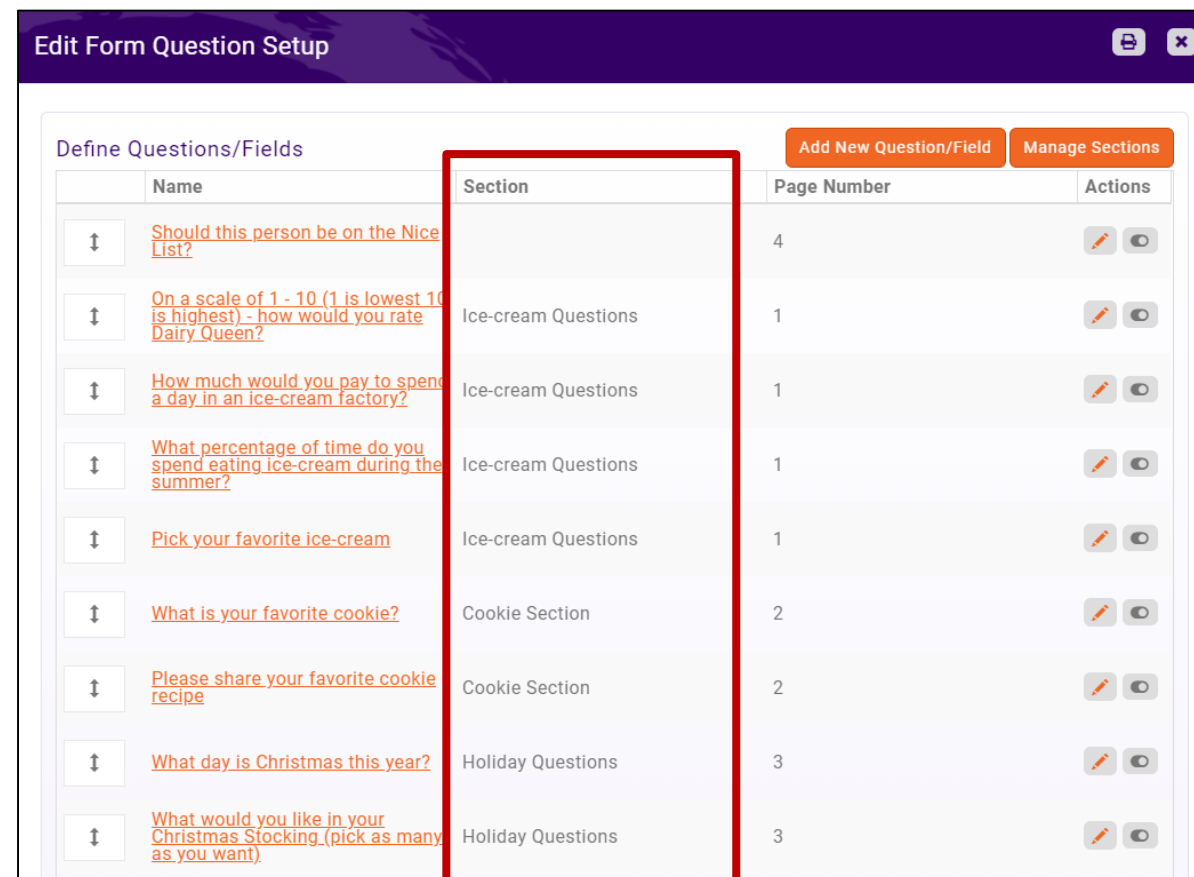
This is what users will see after clicking submit on the form.

B *I* U ~~ABC~~ x_2 x^2 **A** **T1**                      



















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

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

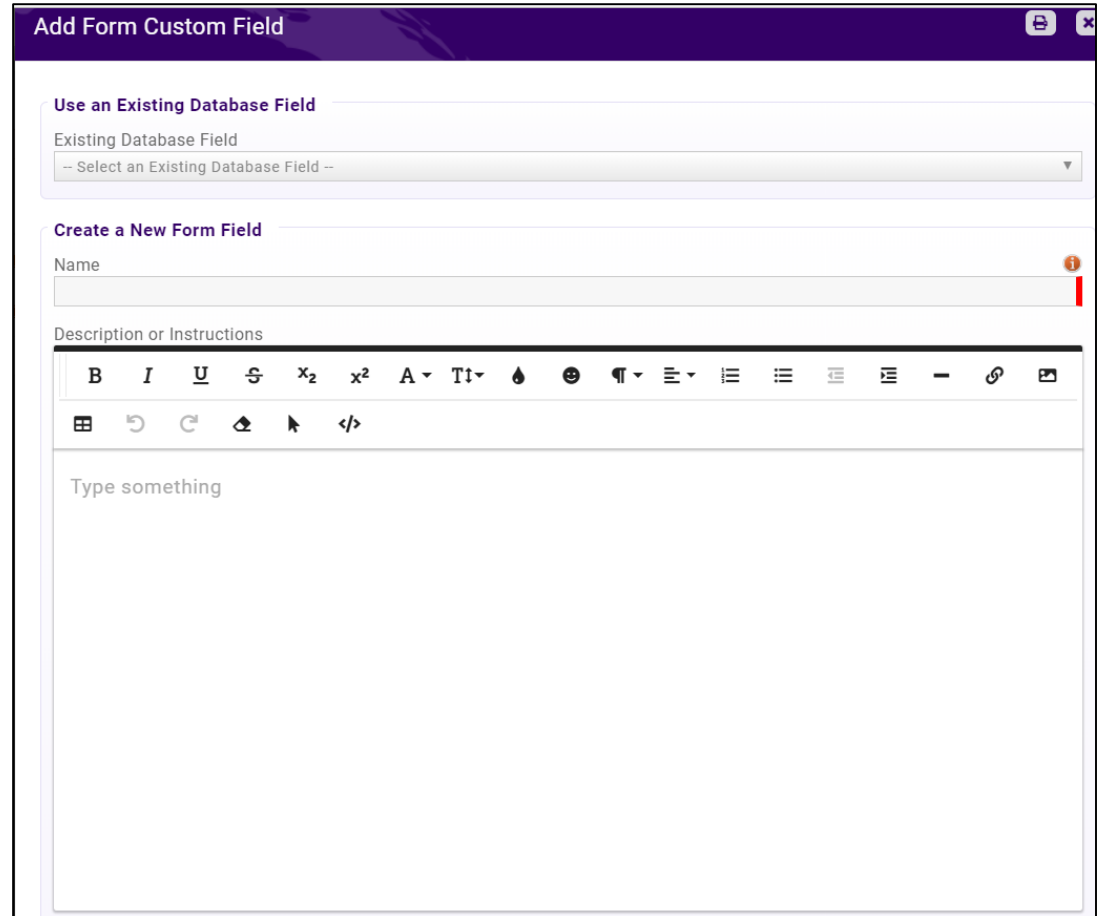


The screenshot shows the 'Edit Form Question Setup' interface. At the top, there are two buttons: 'Add New Question/Field' and 'Manage Sections'. Below these is a table titled 'Define Questions/Fields' with the following columns: Name, Section, Page Number, and Actions. A red box highlights the 'Section' column.

	Name	Section	Page Number	Actions
↑	Should this person be on the Nice List?		4	 
↑	On a scale of 1 - 10 (1 is lowest 10 is highest) - how would you rate Dairy Queen?	Ice-cream Questions	1	 
↑	How much would you pay to spend a day in an ice-cream factory?	Ice-cream Questions	1	 
↑	What percentage of time do you spend eating ice-cream during the summer?	Ice-cream Questions	1	 
↑	Pick your favorite ice-cream	Ice-cream Questions	1	 
↑	What is your favorite cookie?	Cookie Section	2	 
↑	Please share your favorite cookie recipe	Cookie Section	2	 
↑	What day is Christmas this year?	Holiday Questions	3	 
↑	What would you like in your Christmas Stocking.(pick as many as you want)	Holiday Questions	3	 

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)
- ❑ WIKI: [Add Questions to Form](#)



The screenshot shows a window titled "Add Form Custom Field" with a dark purple header. It contains two main sections:

- Use an Existing Database Field:** A section with a label "Use an Existing Database Field" and a dropdown menu labeled "Existing Database Field" with the text "-- Select an Existing Database Field --".
- Create a New Form Field:** A section with a label "Create a New Form Field" containing:
 - A text input field labeled "Name".
 - A rich text editor labeled "Description or Instructions" with a toolbar containing icons for bold (B), italic (I), underline (U), strikethrough, subscript (x₂), superscript (x²), font color (A), text color (T), background color, link, unlink, bulleted list, numbered list, indent, outdent, and a link icon.
 - A text area with the placeholder text "Type something".

Specialized Form Field Types

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

- ❑ WIKI: [Specialized Form Field Types](#)

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

Sharing Your 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

Public Form Url

<https://cherissandbox.growthzoneapp.com/ap/Form/Fill/r6Daku7P>

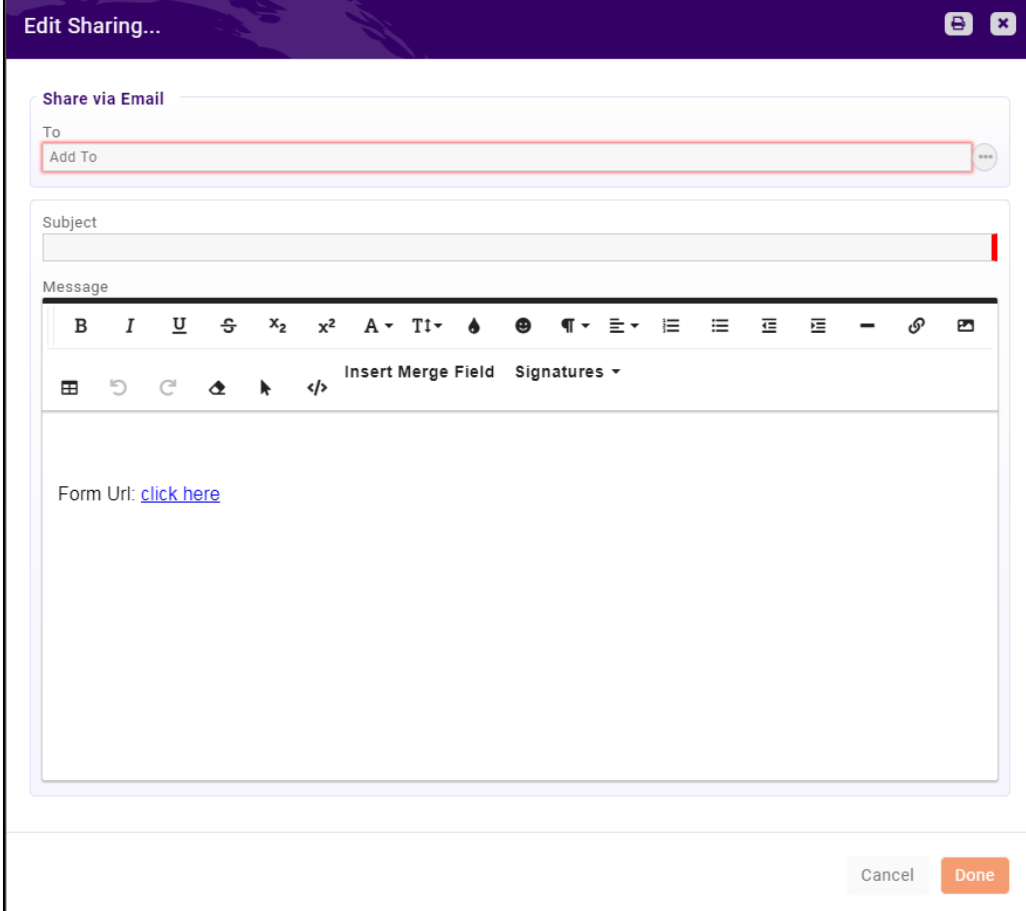
Secure Form Url

<https://cherissandbox.growthzoneapp.com/ap/Form/Fill/r6Daku7P>

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...". It contains a "Share via Email" section with a "To" field containing an "Add To" button. Below this is a "Subject" field and a "Message" field. The "Message" field has a rich text editor toolbar with options for bold, italic, underline, strikethrough, text color, background color, font size, font face, bulleted list, numbered list, link, unlink, insert merge field, and signatures. The message content shows "Form Url: [click here](#)". At the bottom right, there are "Cancel" and "Done" buttons.

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}}>**

WIKI: [Prefill Form Fields](#)

Viewing Form Responses

View Individual Form Responses

WIKI: View Individual Form Responses

Training Survey Form Responses

Search... Show only... Customize Results...

Result Count: 5

From	Created Date
Cheri Petterson	9/6/2018 12:25 PM
209.212.33.119	9/6/2018 12:36 PM
209.212.33.119	9/6/2018 9:44 AM
209.212.33.119	9/6/2018 9:43 AM
209.212.33.119	9/5/2018 4:37 PM

Edit User Response < 1 of 5 > [Print] [Close]

Public Fields

On a scale of 1 - 10 (1 is lowest 10 is highest) - how would you rate Dairy Queen?	5
How much would you pay to spend a day in an ice-cream factory?	\$99.00
What percentage of time do you spend eating ice-cream during the summer?	25
Pick your favorite ice-cream	Rocky Road
What is your favorite cookie?	Chocolate Chip
Please share your favorite cookie recipe	https://mmp4production.blob.core.windows.net/publicfiles/3050959a-df00-4c21-a418-67b8b5d924be/c6aa5738-e64e-4484-99eb-d711b07436f2
What day is Christmas this year?	12/25/2018
What would you like in your Christmas Stocking (pick as many as you want)	Keys to a New Car,Candy Canes,A Million Dollars
First Name	Cheri
Last Name	Petterson

Fields

Filter...

Should this person be on the Nice List?

Yes

Delete Cancel Done

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

WIKI: [Associate Form Responses to Contacts](#)

Associate Form Responses to Contacts

Training Survey Form Responses

Search... Show only... Customize Results...

Result Count: 7

From	Created Date
209.212.33.119	9/6/2018 1:38 PM
209.212.33.119	
Cheri Petterson	
209.212.33.119	
209.212.33.119	
209.212.33.119	
209.212.33.119	

Edit Find or Create Contact

Data from Form

First Name Claude	Last Name Monet
Email claude@mailinator.com	Organization Name

Potential Matches

Select Contact From The Matches Below or Create New Contact

	Person Name	Primary Company	Last Communication Date	Email Address	Membership Status	Estimated Number Of Communications
<input type="radio"/>	Antoine Monet		6/21/2018	claude@mailinator.com	Non Member	1
<input type="radio"/>	Marius Monet		6/21/2018	claude@mailinator.com	Non Member	1
<input type="radio"/>	Claude Monet	Monets Landscaping	7/27/2018	claude@mailinator.com	Active	15

Select Organization From The Matches Below or Create New Organization

Use suggested - We've found a possible match
 Find existing - Search your database
 Create new - Create a new organization record

-- Select an Organization Contact --

Cancel Done

Download All Form Responses

WIKI: [Download All Form Responses](#)



Created Date	Email	First Name	How much would you pay to spend a day in an ice-cream factory?	Last Name	On a scale of 1 - 10 (1 is lowest 10 is highest) - how would you rate Dairy Queen?	Pick your favorite ice-cream
9/6/2018	claude@mailinator.com	Claude	33	Monet	10	Cookie Dough
9/6/2018		James	10	Straka	10	Cookie Dough
9/6/2018		Cheri	99	Petterson	5	Rocky Road
9/6/2018			1		6	Cookie Dough
9/6/2018					0	
9/6/2018					0	
9/5/2018			100		2	

Form Response Report

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

WIKI: [Download All Form Responses](#)

Form Name	Form Response Id	Form Response Date	Email	First Name	Last Name	Should this person be on the Nice List?	On a scale of 1 - 10 (1 is lowest 10 is highest) - how would you rate Dairy Queen?	How much would you pay to spend a day in an ice-cream factory?	What percentage of time do you spend eating ice-cream during the summer?	Pick your favorite ice-cream	What is your favorite cookie?	Please share your favorite cookie recipe	What day is Christmas this year?	What would you like in your Christmas Stocking (pick as many as you want)	Cor Nar
Training Survey Form	43379	9/5/2018 4:37 PM					2	\$100.00	100.00 %						
Training Survey Form	43407	9/6/2018 9:43 AM					0	\$0.00	0.00 %						
Training Survey Form	43409	9/6/2018 9:44 AM					0	\$0.00	0.00 %				9/26/2018		
Training Survey Form	43432	9/6/2018 12:06 PM					6	\$1.00	25.00 %	Cookie Dough			12/25/2018		
Training Survey Form	43436	9/6/2018 12:25 PM		Cheri	Petterson	Yes	5	\$99.00	25.00 %	Rocky Road		https://mmp4production.blob.core.windows.net/publicfiles/3050959a-df00-4c21-a418-67b8b5d924be/c6aa5738-e64e-4484-99eb-d711b07436f2	12/25/2018	Cheri Petterson	

Questions??

