Working with your GrowthZone Forms & Surveys

GrowthZone
smarter association software

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

Overview

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
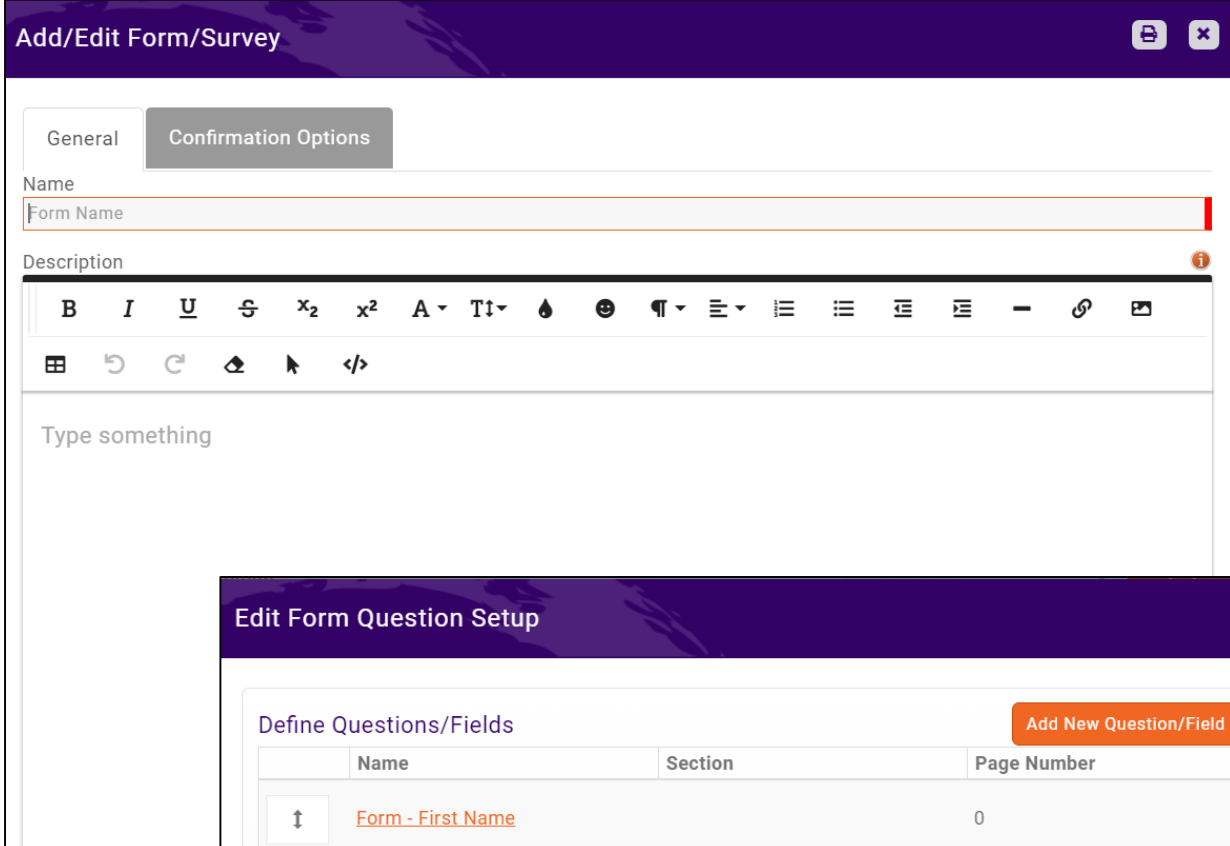- ❑ Render the data in easy to understand/useful ways

Creating a Form

Creating a Form

Creating a form is a two step process:

1. Add the form

2. Add the questions to your form

WIKI: Create a Form
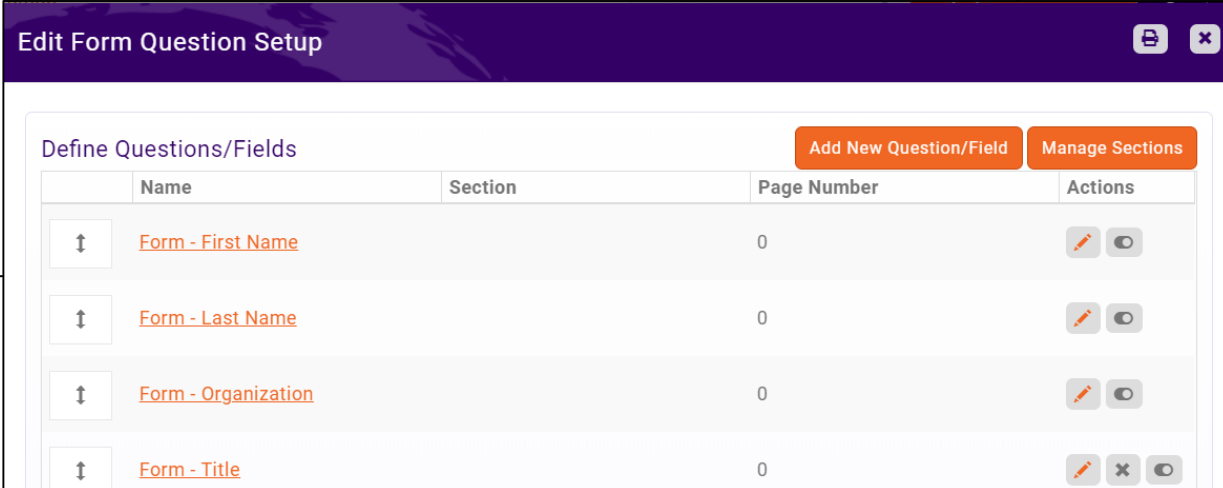
Form Type

- ❑ **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

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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
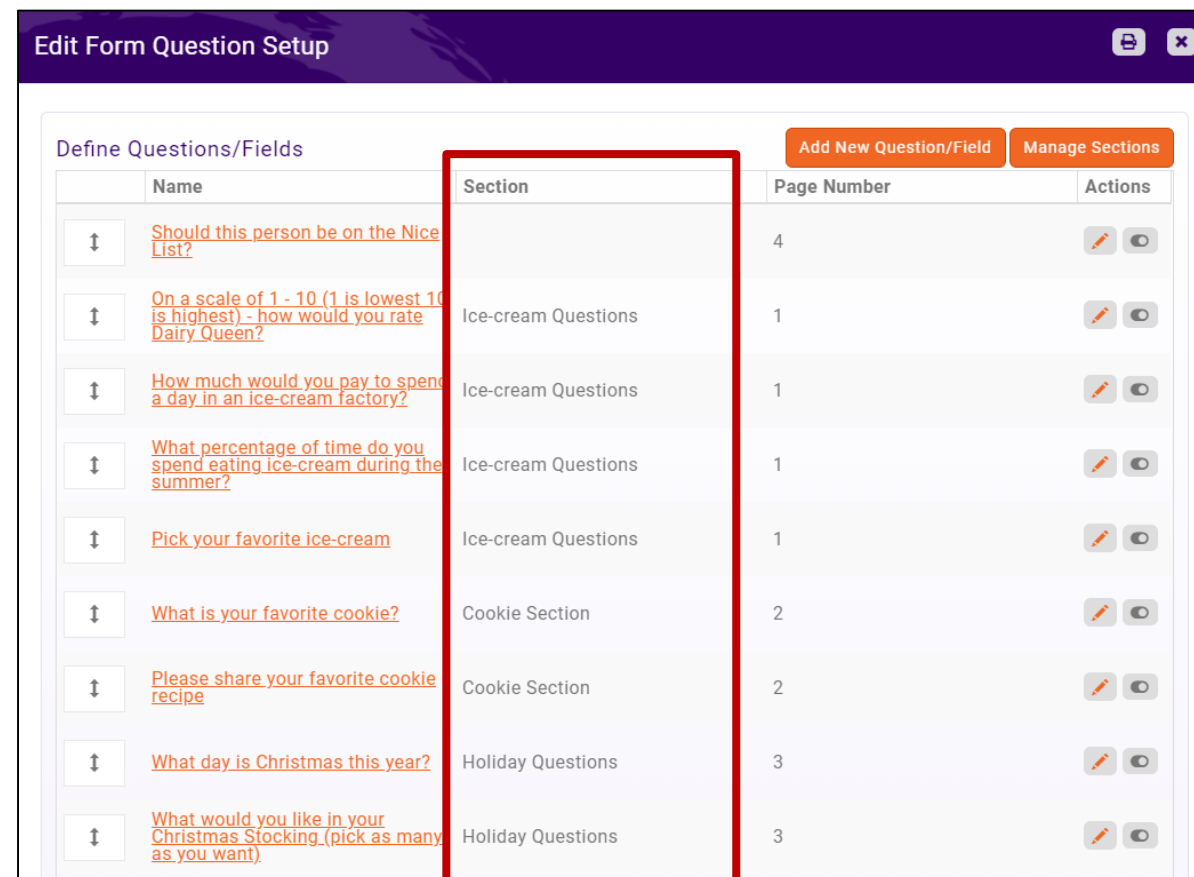
Add Sections to a Form

❑ 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

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)

❑ WIKI: Add Questions to Form

Creating a Form

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

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

Public Form Url
https://cherissandbox.growthzoneapp.com/ap/Form/Fill/r6Daku7P

Secure Form Url
https://cherissandbox.growthzoneapp.com/ap/Form/Fill/r6Daku7P

Share Form

You can share the form by clicking the [share icon] icon – the system will automatically populate contact information
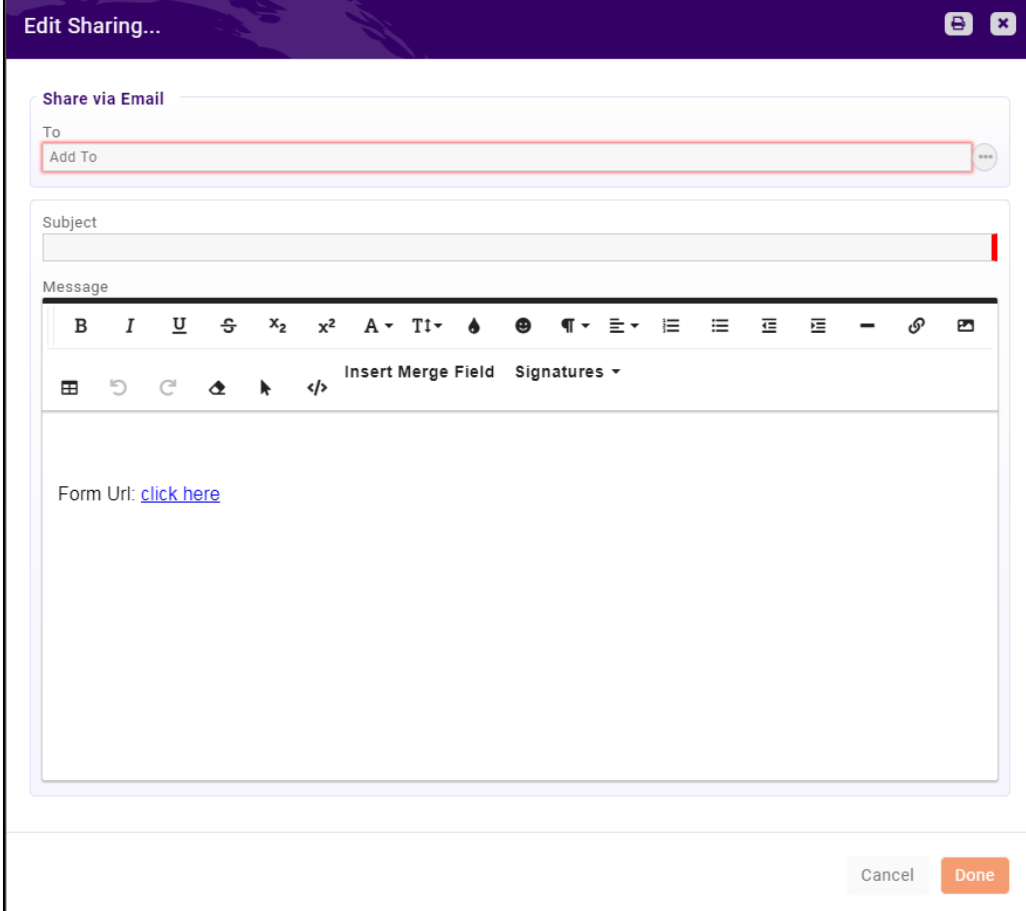
For Example – you could easily send the form to all event attendees

Edit the email as needed…

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

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

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 Reponses

Questions??