

Questionnaires & Forms

Overview

Questionnaires are a flexible way to create and present forms and collect user information. Create Contact Us, Returns, Warranties, Feedback, Event Registration and more. A file upload facility and Captcha can be added. Select from the wide range of preconfigured fields or edit them to suit.

Contact Us

Enquiry

Name *

Name

Email *

Email

Phone

Phone

Enquiry

Enquiry

Message *

Message

Send

Contact Details

Phone:

07 3369 3733

Fax:

07 3891 3996

Email:

info@commercevision.com.au

Address:

30 Lisburn Street East Brisbane QLD 4169

30 Lisburn St

30 Lisburn St, East Brisbane QLD 4169

View larger map

Woolloongabba

30 Lisburn St, East Brisbane QLD 4169

Stones Corner

Step-by-step guide

1. Create the Questionnaire

1. In CMS, go to **Content Advanced Content Questionnaire Group Maintenance** (/QuestionnaireMaintenance.aspx).

2. Click **New**.

3. Set values (fields not listed here can be left blank):
 - Questionnaire Code** - a unique identifying code for the questionnaire
 - Questionnaire Description** - a brief description of the questionnaire
 - Spam Validation** - tick this box to enable Captcha functionality for anti-spam
 - Attachment Upload** - tick to allow the user to attach files on submit. (File types specified in [Questionnaire Widget](#))

Questionnaire Maintenance

Questionnaire Code : BPDContactUs

Questionnaire Description : Contact Us

Email Address : noreply@commercevision.com.au

Top Template : Please Select ..

Bottom Template : Please Select ..

Field To Validate : Please Select ..

Field for users email Address : Please Select ..

Table to validate against : Please Select ..

Field to validate against : Please Select ..

Page to run on validation true : Please Select ..

Email to send on validation true : Please Select ..

Page to run on validation false : Please Select ..

Email to send on validation false : Please Select ..

Field to store validation result : Please Select ..

Spam Validation : ☒

Attachment Upload : ☐

Completion message displayed to user :

Use User Email As Sender Address : ☐

Requires Signature : ☐

NOTE:

For the 'Send To End User' setting on the questionnaire widget to work (below), you need to define which field, from the **Field for users email Address** (above) on the questionnaire.

Questionnaire

Search...

General Options

Captchas

Signature

Common Options

Documentation

General Options

1 Description

2 Layer * Authenticated

Title

Title Icon

Questionnaire * Claim Request for Save Program (ClaimRequest)

1 Email To andrew.rogencamp@commercevision.com.au

Send To End User * ☒

Show Help Icon * ☐

Email Subject * Claim Request

Email Template * Questionnaire Results Email

1 Redirect Route * /thank-you

Button Label * Submit

1 Valid Upload Types

File Upload Label * File Upload:

1 Allow Multiple Upload Files ☐

1 Enable Widget Lazy Load? ☐

Example: If you setup a questionnaire which has the following fields in it

Email Address, Contact Name, Contact Surname and Phone Number. You would choose Email Address from the **Field for users email Address** so that the user gets a copy of the form they filled in.



Digital Signature

(Versions 4.37+)

Forms can accept digital signatures. To insert a mandatory Signature input box, tick **Requires Signature**. Signature field labels can be edited in the [Questionnaire Widget](#).

Commerce Vision B2B eCommerce Event Registration

Name *

Email *

Phone

Which event would you like to register for? *

☐ Education User Group

☐ EST3 Training

☐ FCWnx Training

☐ Strategic Partner Conference

Note *

Signature *

Clear Signature

Send

4. To save, click **OK**.

2. Add Questions


1. In the Questionnaire selected, click **Questions**.

2. Click **New**.

3. Select a question from the **Question Code** drop-down.

4. Assign a number for ordering of questions on the page.

5. Click **OK**.

Search For : <input type="text"/>			
<input checked="" type="radio"/> Contains <input type="radio"/> Starts With <input type="button" value="Search"/>			
	Field Group Name	Field Name	Field Sequence
<input checked="" type="radio"/>	DEMO	Contact_Name	1
<input type="radio"/>	DEMO	Contact_Email	2
<input type="radio"/>	DEMO	Comments	3
 Modify : New : Delete			
3 records. (1 page)			1

6. Repeat as needed until all question fields have been added to the questionnaire.

7. To make sure saved changes appear on your site, click **Refresh Dictionary**.



If the question you want is not in the Question Code drop-down, create it with these steps:

1. Go to **Content Advanced Content Questionnaire Field Maintenance** (/QuestionMaintenance.aspx).
2. Click **New**.
3. Set the values as follows:
 - a. **Question Code** - a unique code (with no spaces) to easily identify this question for selection later on
 - b. **Question Text** - the question prompt which will be displayed to the user
 - c. **Sequence** - determines the order in which the question appears in the maintenance screen. This will default to the next available sequence number, but can be overwritten
 - d. **Answer Format** - the required format for responses to this question (e.g. Short Text, Number, Tickbox, etc)

If you selected the List, Radio Button or Check List data type:

Lookup :

Lookup: Add a value separated by a semi-colon. Example: Mrs;Ms;Mr;Miss

- e. **Length** - the number of characters the field is to be restricted to (if applicable)
- f. **Required** - tick this box if this question is to be mandatory
- g. **Help** - enter tooltip text here - either a further explanation or example; anything which might assist the user in completing the questionnaire
- h. **Hidden** - tick this box if the question should NOT appear on the questionnaire (used to render hidden HTML elements on a questionnaire page)

4. Click **OK** to save.

5. To make sure saved changes appear on your site, click **Refresh Dictionary**.

3. Add the Questionnaire Widget and configure settings

This example uses an existing custom page.

1. Go to **Content Content Custom Pages**.

2. Click **Design** on the selected Custom Page. (**NOTE** - If the 'Design' button is not there, your page is not widget-based. It will need to be converted via page Options.)
3. Click **Add Widget**.
4. Add the **Questionnaire** widget.
5. Click **Edit** for the widget.
6. Configure options. See: [Questionnaire Widget](#).
7. Click **Save**.
8. Navigate to the custom page and view your new questionnaire!



Pro Tip

Make your customers' lives easier by prefilling some of the questionnaire fields for them!

From version 3.92+, you can pre-populate fields based on customer/user data, or page parameters. Examples: Name and Company Name (for logged in users), or Product Code (in a stock enquiry form on a product detail page).

Here's a quick how-to:

1. Find your questionnaire fields. Go to **Content Advanced Content Questionnaire Group Maintenance**.
2. Select your questionnaire and click the '**Questions**' link. The field name of each questionnaire field is displayed. Take notes (or a screenshot!).
3. Go to **Content Advanced Content Questionnaire Field Maintenance**.
4. Search for the field to prefill and click **Modify**.
5. Enter the value in **Token to Prepopulate**.

Field to Prefill	Token
User Name	User.FirstName,User.Surname
Company Name	Customer.Name
Email Address	User.EmailAddress
Phone	User.PhoneNumber

6. To save, click **OK**.
7. Click the **RefreshDictionary** link to update the questionnaire.
8. Repeat for another field.

If you don't see the token you're after, [contact Commerce Vision](#).

Additional Information

Create forms include Contact Us, Returns, Warranties and Feedback.

Minimum Version Requirements	3.78
Prerequisites	--
Self Configurable	Yes
Business Function	Marketing

BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

- [Questionnaires & Forms](#)
- [Questionnaire Widget](#)
- [Questionnaire Results Widget](#)
- [Questionnaire Results Title Widget](#)