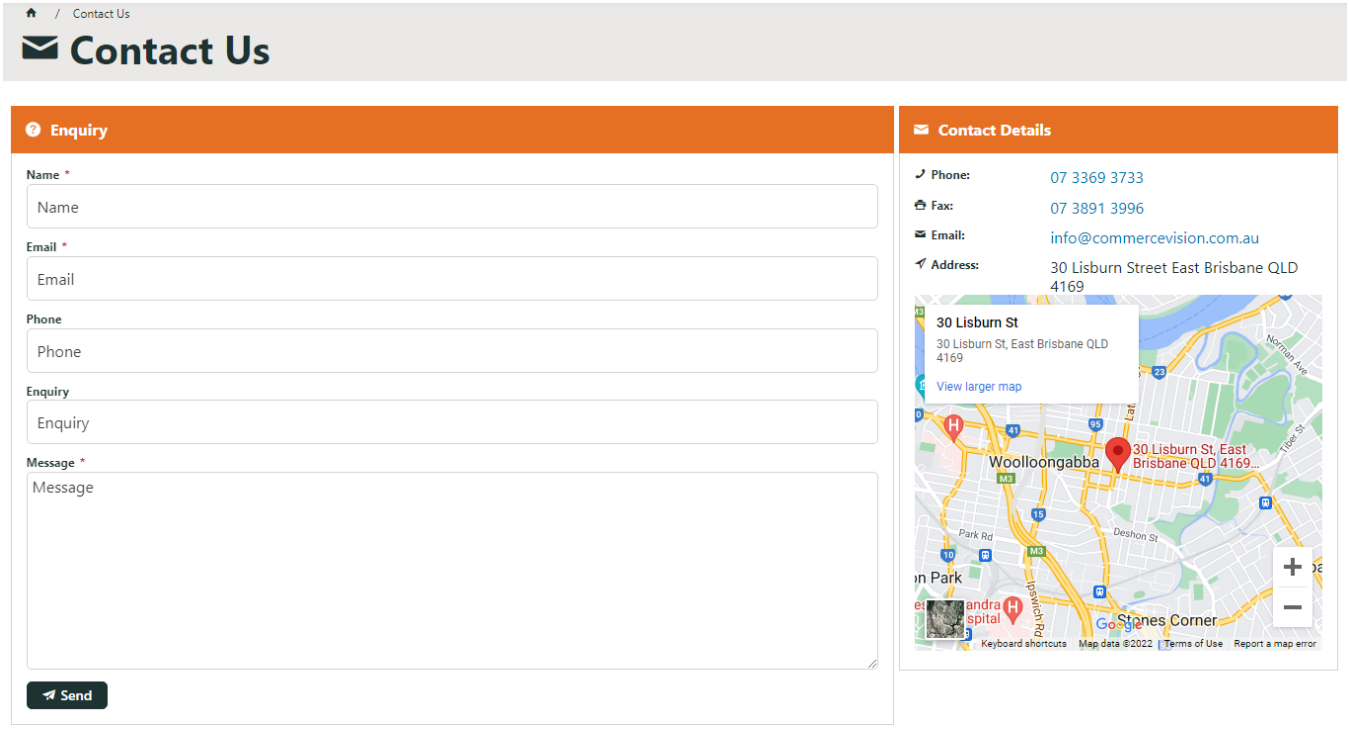
Questionnaires & Forms

Overview

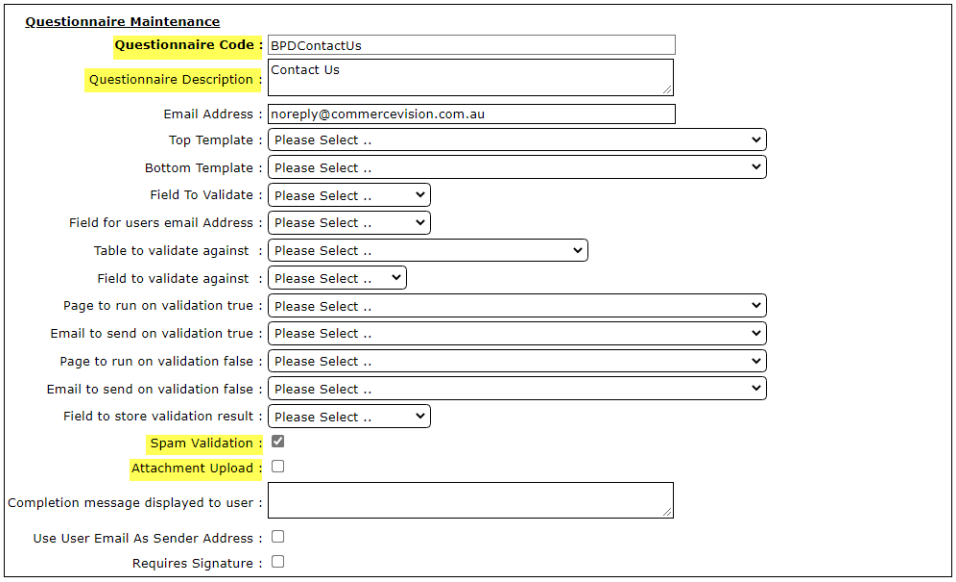
Questionnaires are a flexible way to create and present forms and collect user information. Create Contact Us, Returns, Warranties, Feedback, Event Registration and more. A file upload facility and Captcha can be added. Select from the wide range of preconfigured fields or edit them to suit.



Step-by-step guide

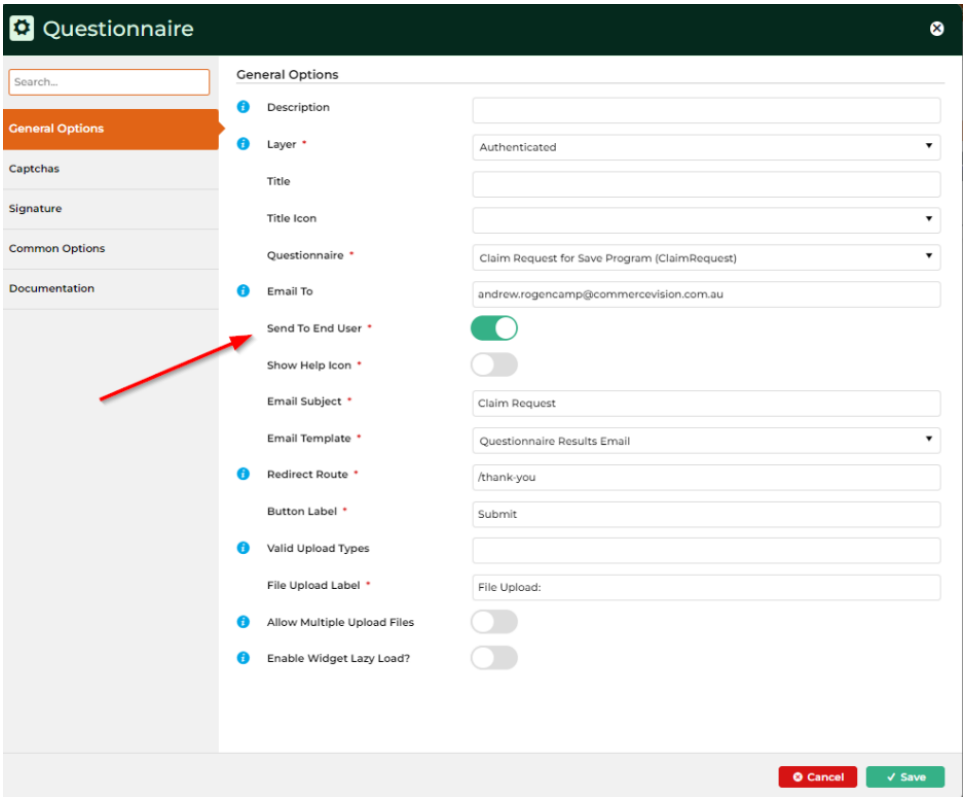
1. Create the Questionnaire

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 Questionaire Widget)*



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.*



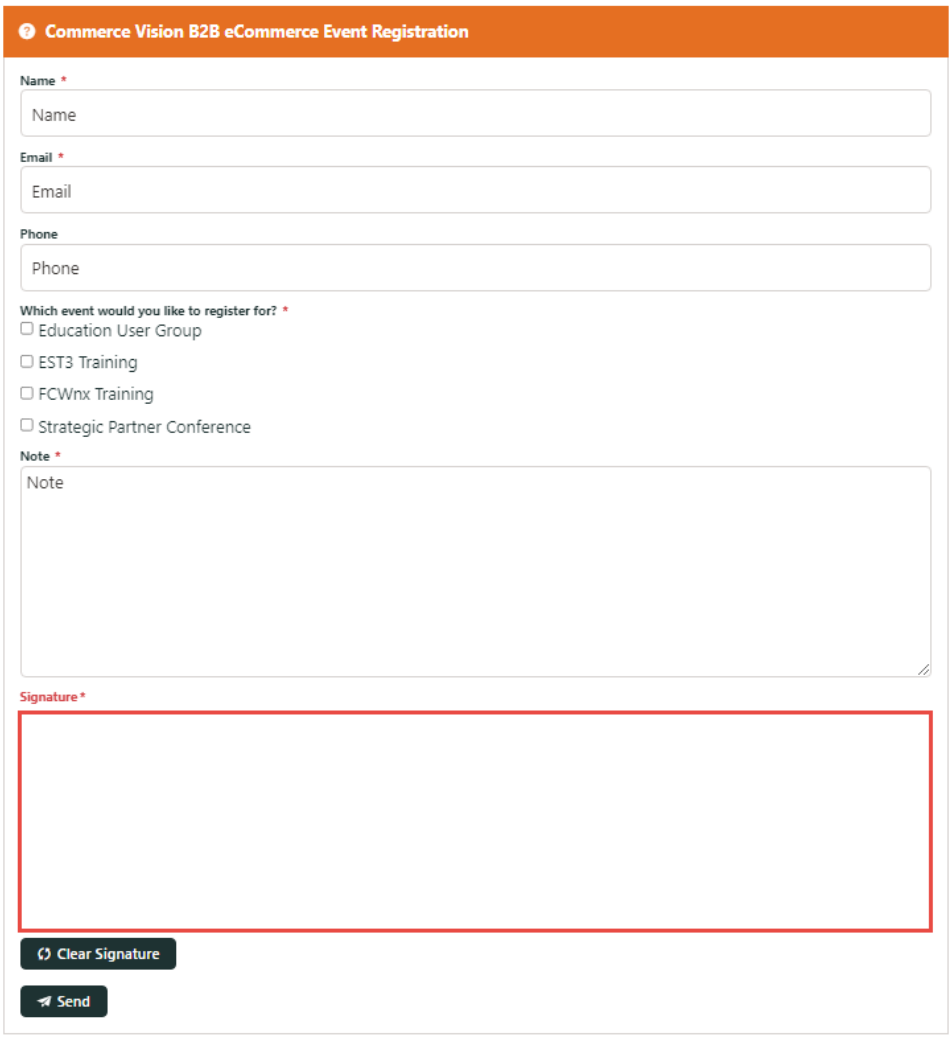
Example: If you setup a questionnaire which has the following fields in it

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 Questionaire Widget.*

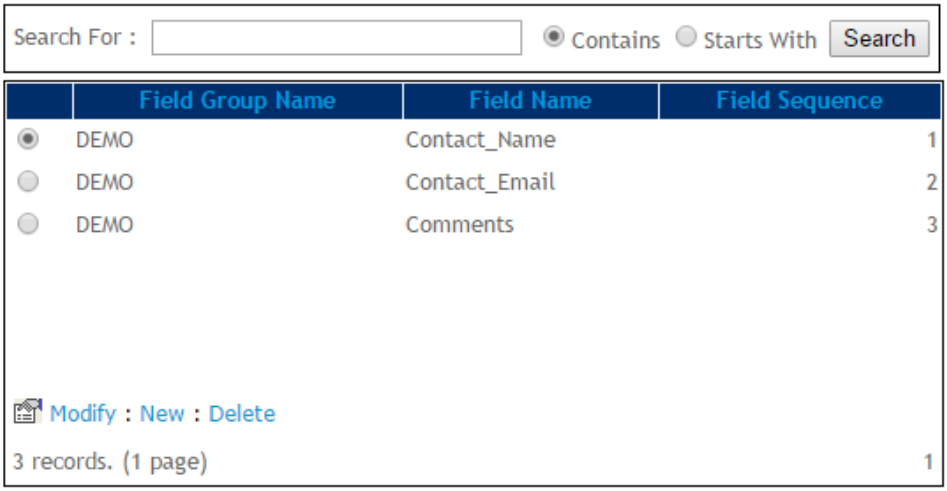


4. *To save, click* ***OK****.*

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**.*



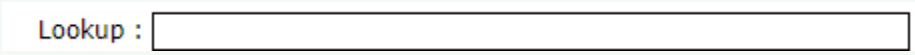
6. *Repeat as needed until all question fields have been added to the questionnaire.*

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:** 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