


How to Use the External Questionnaires Tool

The **External Questionnaires** tool allows you to create an external version of a **Views Questionnaire**, which can be shared with external users **via email, SMS, web links, or QR codes**. Once completed, the forms are automatically sent back into **Views**, where you can review them and associate them with contact records in your account. This guide outlines all these processes.

How to Create an External Questionnaire

- Hover over **Evidence** and click **Questionnaires**.
- Select the **Views Questionnaire*** you want to use as the basis for the external form.
- From the subheadings on the left-hand side, select **Forms** in the **External Forms** menu.
- Click the **plus icon** to create a new external questionnaire. 
- Enter a **Title, Subtitle, and Description**.
- Use the **Available From** and **Expires On** fields to set the period during which the questionnaire will be valid.
- To review responses before they are added to your Views account, set **Auto Process Responses** to **Off**. To have responses added automatically, set it to **On**.
- Click **Next**.

* Before creating an **External Questionnaire**, you must first add the questionnaire to your **Views** account. For guidance on this process, please refer to the **How to Create a Questionnaire** document at <https://www.substance.net/evidence-section/>.

Questionnaire Details

General

Title *

Impact Questionnaire

Subtitle

Description

Questionnaire to gather feedback from Participants to measure changes, benefits, or improvements.

Restrictions

Available from

01/01/2025

Expires on

31/12/2026

Auto Process Responses

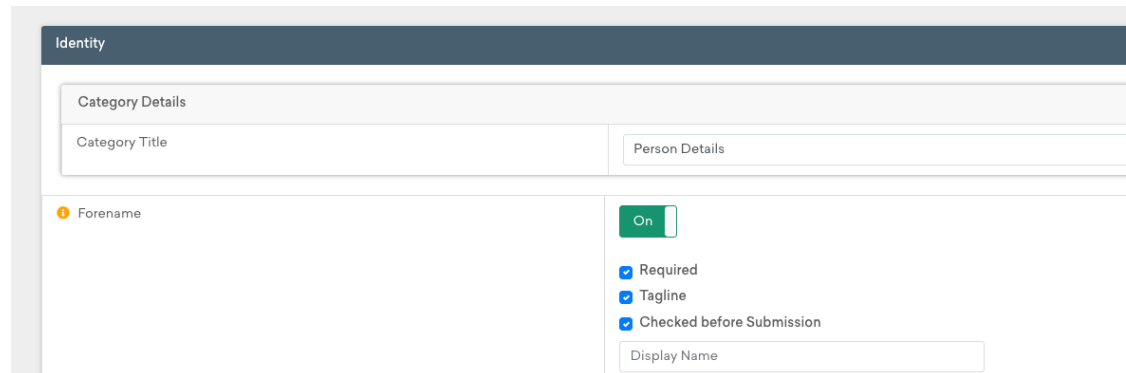
Off

On

How to Select Fields on an External Questionnaire

If your organisation has a **Views Premium** package, you can customise the content of the **External Form**, including the fields, layout, and styling. If your organisation has a **Views Plus** package, the content is fixed, meaning all fields from the **Views Questionnaire** will be automatically included in the **External Form**.

- To select the questionnaire's fields, toggle **On** next to the fields you want to include.
- Select **Required** if the field should be compulsory.
- If you enable **Checked before submission**, respondents will be asked to confirm their response to this field before saving.
- Click **Save** to confirm your selection.



Identity

Category Details

Category Title

Person Details

Forename

On

☒ Required

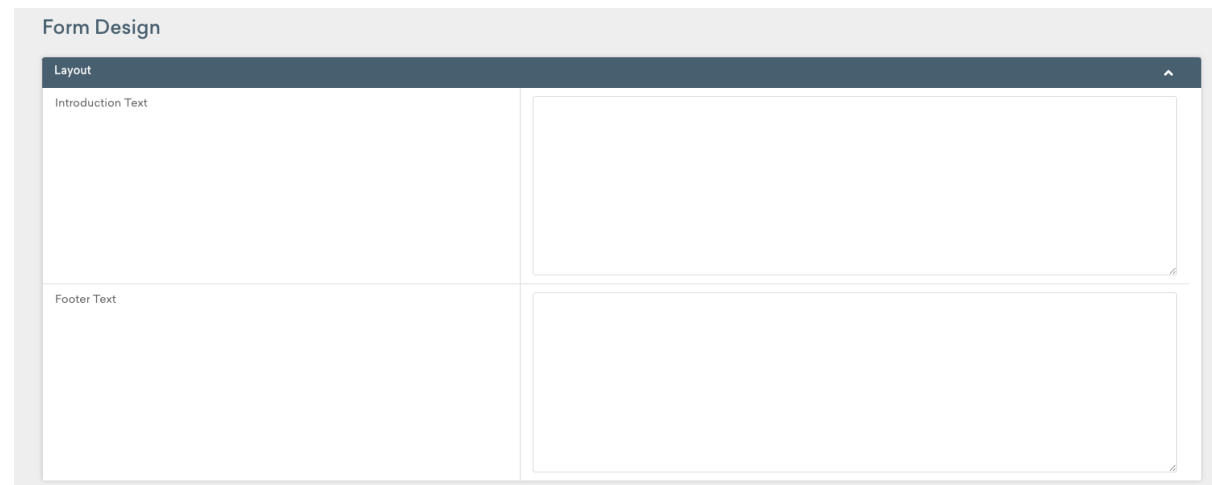
☒ Tagline

☒ Checked before Submission

Display Name

How to Apply Styling to an External Questionnaire

- Select **Form Design** from the **Configuration** menu on the left-hand side.
- In the **Layout** section, add text to appear at the beginning and end of the form.



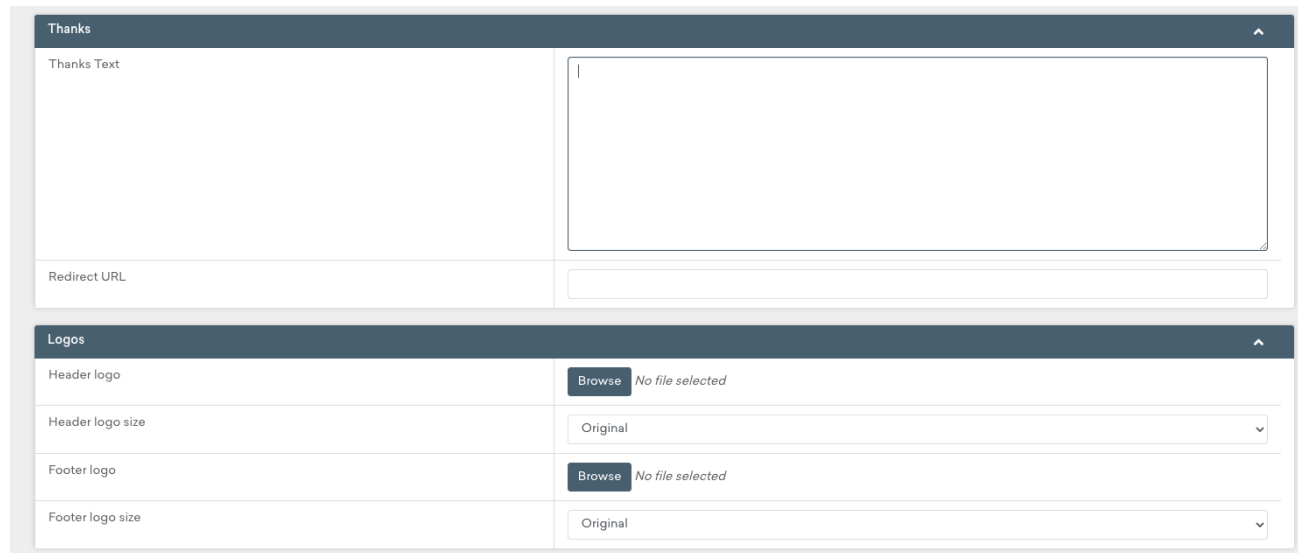
Form Design

Layout

Introduction Text

Footer Text

- In the **Thanks** section:
 - Add text to display after the form is completed.
 - Redirect users to a specified web address using the **Redirected To** field or link the form to another **External Form** to create a **chained form**.
 - Upload **logos** and **banners** to the **Header** and/or **Footer** of the form.










The screenshot displays two configuration sections for a form. The top section, titled 'Thanks', contains a 'Thanks Text' field with a large text area, a 'Redirect URL' field with a text input, and a 'Redirected To' dropdown menu. The bottom section, titled 'Logos', contains four rows: 'Header logo' with a 'Browse' button and 'No file selected' text, 'Header logo size' with a dropdown menu set to 'Original', 'Footer logo' with a 'Browse' button and 'No file selected' text, and 'Footer logo size' with a dropdown menu set to 'Original'.

Thanks	
Thanks Text	<div></div>
Redirect URL	<input type="text"/>
Redirected To	<div></div>

Logos	
Header logo	<div><div>Browse</div>No file selected</div>
Header logo size	<div>Original</div>
Footer logo	<div><div>Browse</div>No file selected</div>
Footer logo size	<div>Original</div>

- In the **Styles** section:
 - Upload a **.css file** in the **Styles file (.css)** field to customise the form's appearance.
 - Set the **Font Style**, **Font Size**, and **Background Colour** directly for each section.
 - Alternatively, click **Actions** at the top of the page and select **Get Form Config** to import styling from another external form.

Styles				
Styles file (.css)	<input type="button" value="Browse"/> <i>No file selected</i>			
Styles URL	<input type="text"/>			
Form background	<input type="text"/> 			
Form header	Font Styles <input type="text" value="Default"/>	Font sizes <input type="text" value="Default"/>	Color <input type="text" value=""/> 	
Form subheader	Font Styles <input type="text" value="Default"/>	Font sizes <input type="text" value="Default"/>	Color <input type="text" value=""/> 	
Form intro text	Font Styles <input type="text" value="Inter"/>	Font sizes <input type="text" value="12pt"/>	Color <input type="text" value="#e76f51"/> 	Background color <input type="text" value="#2a9d8f"/> 
Form section headers	Font Styles <input type="text" value="Default"/>	Font sizes <input type="text" value="Default"/>	Color <input type="text" value=""/> 	Background color <input type="text" value=""/> 

- When you have finished designing the form, click **Save**.



How to Share an External Questionnaire




There are two methods for sharing an **External Questionnaire**:

1. **Via a URL or QR Code** – Best for collecting **anonymous responses**.
2. **Via a Mail Out** – Best for collecting responses directly from **Views contacts**.


Sharing an External Questionnaire via a URL or QR Code

- Hover over **My Account** and click **Administration**.

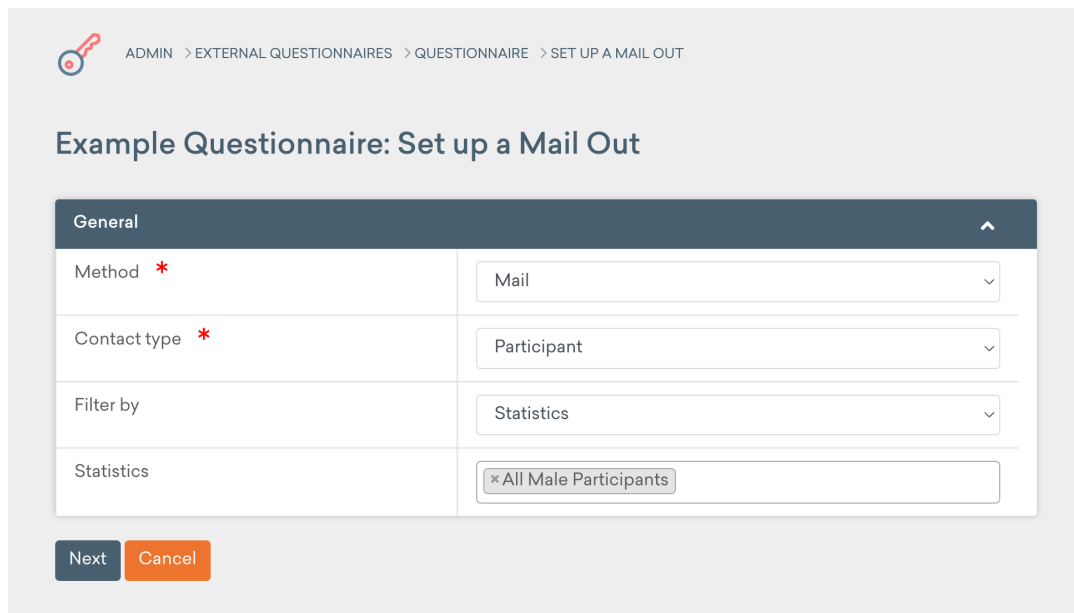
- Under the **Tools** section, select **External Forms**.
- From the subheadings on the left-hand side, select **External Questionnaires**.
- Click the **eye icon** next to the form. 
- The **weblink** will be displayed in the **Link** field, and the **QR code** will be shown in the **QR Code** field. These can be shared with individuals who need to register as contacts in your account.
- Click the **Copy to Clipboard** icon to copy the link for easy sharing. 

External	
Link	<div>https://external-forms.internal.viewsapp.net/forms/v/040a5966-02fb-4e83-8a63-fec4641997d8</div> <div> </div>
QR Code	<div></div> <div>Download QR Code</div>

Sharing an External Questionnaire via a Mail Out

- Hover over **My Account** and click **Administration**.
- Under the **Tools** section, select **External Forms**.
- From the subheadings on the left-hand side, select **External Questionnaires**.
- Click the **eye icon** next to the form. 

- From the subheadings on the left-hand side, select **Set Up Mail Out** from the **Mail Outs** menu.
- Select the **Method** as either **Mail** or **SMS[†]**.
- Choose the **Contact Type** you wish to send the **Mail Out** to. For example, you may want to contact **Participant** records.
- In the **Filter By** field, select how you'd like to filter the list of contacts:
 - Filter by attendance at a **work strand**, such as an **Agency Project** or **Session Group**, or
 - Filter by inclusion in a **Statistic**.



The screenshot shows the 'Set up a Mail Out' form within the Views application. The breadcrumb trail at the top reads: ADMIN > EXTERNAL QUESTIONNAIRES > QUESTIONNAIRE > SET UP A MAIL OUT. The form title is 'Example Questionnaire: Set up a Mail Out'. The form is divided into a 'General' section with a collapse arrow. It contains four rows of fields: 'Method' with a red asterisk and a dropdown menu set to 'Mail'; 'Contact type' with a red asterisk and a dropdown menu set to 'Participant'; 'Filter by' with a dropdown menu set to 'Statistics'; and 'Statistics' with a text input field containing '× All Male Participants'. At the bottom of the form are two buttons: 'Next' (dark blue) and 'Cancel' (orange).

General	
Method *	Mail
Contact type *	Participant
Filter by	Statistics
Statistics	× All Male Participants

Next Cancel

[†] The **SMS Mail Outs** tool requires a **Views Premium** package.



- Click **Next**.
- Tick the boxes next to the contact records you wish to include in the Mail Out.
- Click **Next**.
- Compose the message you'd like to send:
 - Choose a **pre-existing template** or
 - Write the message from scratch.

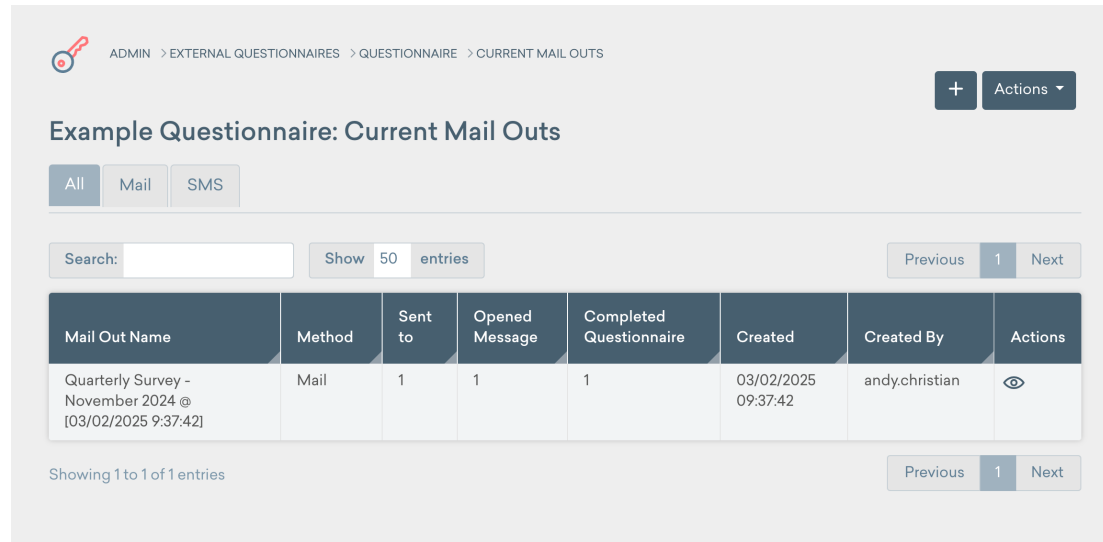
A screenshot of the 'Details' section of a mail out composition interface. It shows a form with four rows: 'Choose a correspondence template' with a dropdown menu set to 'Quarterly Survey - November 2024'; 'Mail Out Name' with a text field containing 'Quarterly Survey - Q4 2024'; 'Subject' with a text field containing 'Quarterly Survey - Q4 2024'; and 'Message Body' with a rich text editor. The rich text editor contains the following text: 'Hi, Please click [here](#) to answer your Questionnaire If you have any questions, let us know at support@viewsapp.net. Thank you, Views Support'. The interface includes a toolbar with icons for bold, italic, link, and other text formatting options.

Details	
Choose a correspondence template	Quarterly Survey - November 2024
Mail Out Name *	Quarterly Survey - Q4 2024
Subject *	Quarterly Survey - Q4 2024
Message Body *	<p>Hi,</p> <p>Please click here to answer your Questionnaire</p> <p>If you have any questions, let us know at support@viewsapp.net.</p> <p>Thank you,</p> <p>Views Support</p>

- Click **Submit** to send the **Mail Out**.

Reviewing and Managing Mail Outs

- After submission, you'll be taken to the **Mail Outs** page for the External Questionnaire, where you can:
 - Review your Mail Out.
 - See how many contacts have **received** the message, **opened** it, and **completed** the questionnaire.




ADMIN > EXTERNAL QUESTIONNAIRES > QUESTIONNAIRE > CURRENT MAIL OUTS


Example Questionnaire: Current Mail Outs

All Mail SMS

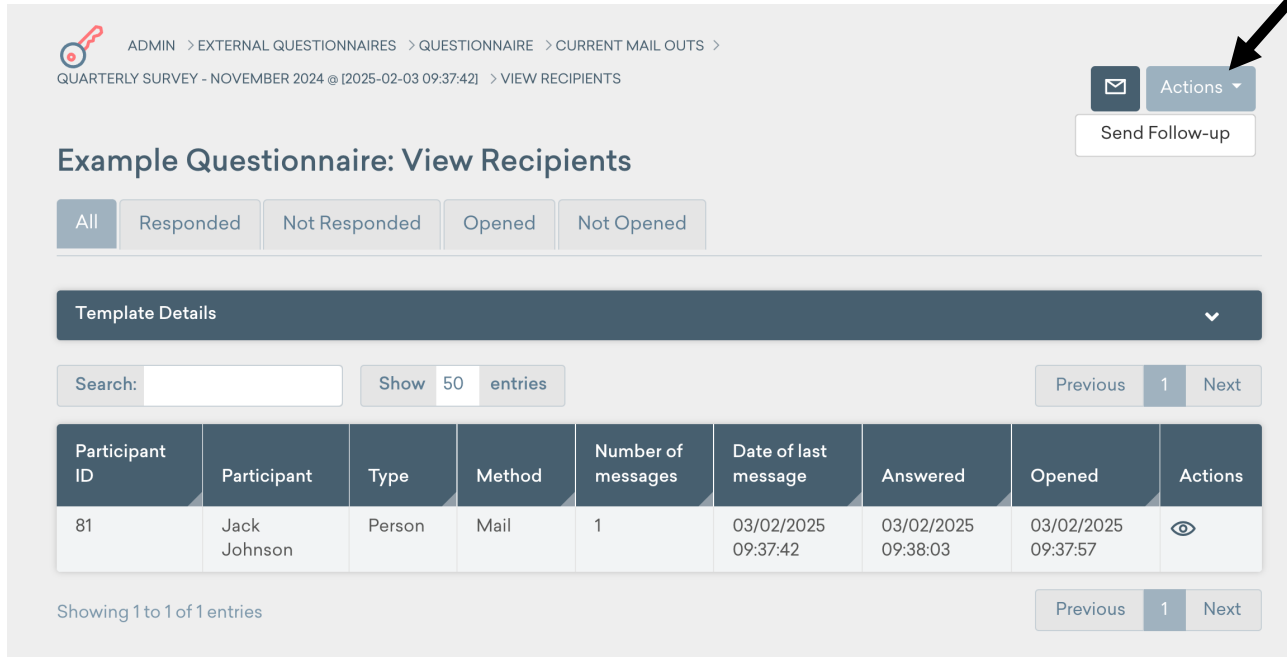
Search: Show 50 entries Previous 1 Next

Mail Out Name	Method	Sent to	Opened Message	Completed Questionnaire	Created	Created By	Actions
Quarterly Survey - November 2024 @ [03/02/2025 9:37:42]	Mail	1	1	1	03/02/2025 09:37:42	andy.christian	

Showing 1 to 1 of 1 entries Previous 1 Next

- Click the **eye icon** to view the contacts who have received the Mail Out. 
- To send a follow-up message:

- Click **Actions** > **Send Follow-up** to reach out to recipients in the list.




ADMIN > EXTERNAL QUESTIONNAIRES > QUESTIONNAIRE > CURRENT MAIL OUTS >
QUARTERLY SURVEY - NOVEMBER 2024 @ [2025-02-03 09:37:42] > VIEW RECIPIENTS

Example Questionnaire: View Recipients

All Responded Not Responded Opened Not Opened

Template Details

Search: Show 50 entries Previous 1 Next

Participant ID	Participant	Type	Method	Number of messages	Date of last message	Answered	Opened	Actions
81	Jack Johnson	Person	Mail	1	03/02/2025 09:37:42	03/02/2025 09:38:03	03/02/2025 09:37:57	


Showing 1 to 1 of 1 entries Previous 1 Next


How to Process Pending Questionnaires

If an external questionnaire has **Auto Process Responses** set to **Off**, responses must be reviewed and manually accepted before they are added to your **Views** account.

To Accept a Pending Response:

- Hover over **Evidence** and click **Questionnaires**.

- Find the relevant questionnaire and click the **eye icon** to the right. 
- From the menu on the left-hand side, select **Pending** under the **External Forms** category.
- A list of all external forms linked to this questionnaire will be displayed.


EVIDENCE > QUESTIONNAIRES > MONEY MANAGEMENT QUESTIONNAIRE > PENDING

Money Management Questionnaire: Pending

Actions ▾




Pending - Active

Pending - Inactive

Search:



Show 50 entries

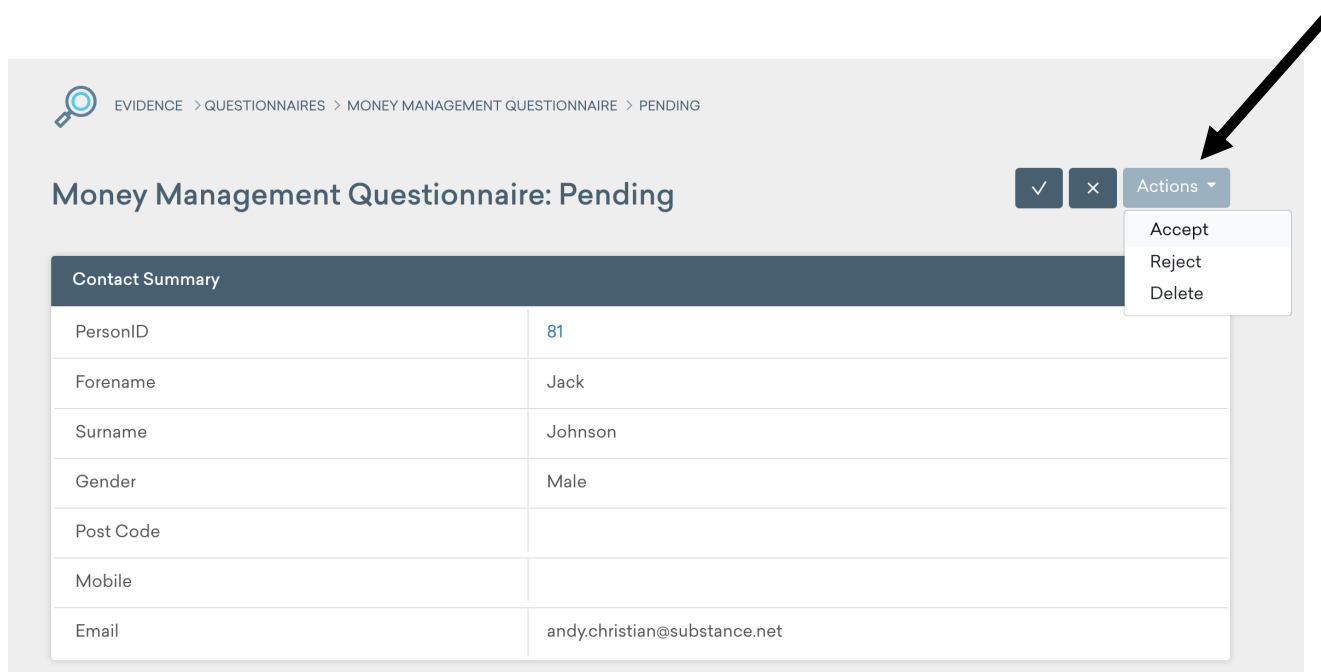
Previous 1 Next

External Form	Questionnaire	Pending Records	Last Submission	Actions 
Example Questionnaire	Money Management Questionnaire	1	03/02/2025 09:38:03	
Barclays Money Management	Money Management Questionnaire	2	15/01/2025 09:10:12	

Showing 1 to 2 of 2 entries

Previous 1 Next

- Click the **eye icon** next to the external form you wish to review. 
- Click the **eye icon** next to the specific entry you want to process. 
- From the **Actions** menu, choose to either **Accept**, **Reject**, or **Delete** the entry.



EVIDENCE > QUESTIONNAIRES > MONEY MANAGEMENT QUESTIONNAIRE > PENDING

Money Management Questionnaire: Pending

✓ × Actions ▾

- Accept
- Reject
- Delete

Contact Summary	
PersonID	81
Forename	Jack
Surname	Johnson
Gender	Male
Post Code	
Mobile	
Email	andy.christian@substance.net

- If you select **Accept**, you will be taken to the final review page.
- On the review page, you can:
 - Review the submission details.
 - Make any necessary edits before adding the form to your account.
- In the **Admin** section, you have the option to edit **Contact** and **Work** associations if needed.

Admin

Date *

30/01/2025

Time *

12:15

Contact Association

Participant

Contact Title

Bill Jones

Work Association

Please Select

Work Title

Please Select

- Once you've completed your review, click [Save](#) at the bottom of the page to add the form to your account.