

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

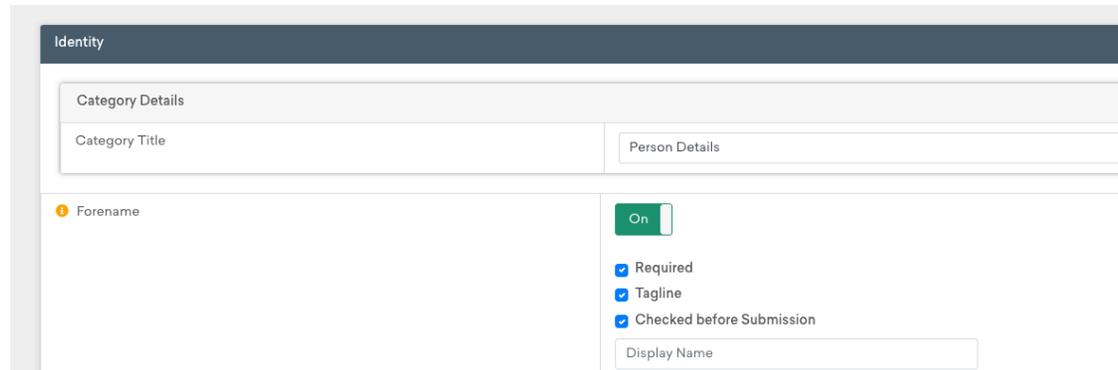
General	
Title *	Impact Questionnaire
Subtitle	
Description	Questionnaire to gather feedback from Participants to measure changes, benefits, or improvements.

Restrictions	
Available from	01/01/2025
Expires on	31/12/2026
Auto Process Responses	<input checked="" type="radio"/> Off <input type="radio"/> 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.



The screenshot shows the 'Identity' configuration panel. It has a dark header with the word 'Identity'. Below the header is a 'Category Details' section with a 'Category Title' input field. To the right is a 'Person Details' section. Below these is a 'Forename' field with a yellow warning icon. To the right of the 'Forename' field is a green 'On' toggle switch. Below the toggle are three checked checkboxes: 'Required', 'Tagline', and 'Checked before Submission'. At the bottom right is a 'Display Name' input field.

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.



The screenshot shows the 'Form Design' configuration panel. It has a dark header with the word 'Form Design'. Below the header is a 'Layout' section with a dark header and an upward arrow. The layout is divided into two rows. The top row has 'Introduction Text' on the left and a large empty text area on the right. The bottom row has 'Footer Text' on the left and another large empty text area on the right.

- 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 shows two configuration sections in a form builder interface. The top section is titled 'Thanks' and contains a 'Thanks Text' field with a large text area, a 'Redirect URL' field with a text input, and a 'Logos' section below it. The 'Logos' section has 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'.

- 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"/> No file selected			
Styles URL	<input type="text"/>			
Form background	<input type="text"/> 			
Form header	Font Styles Default	Font sizes Default	Color <input type="text"/> 	
Form subheader	Font Styles Default	Font sizes Default	Color <input type="text"/> 	
Form intro text	Font Styles Inter	Font sizes 12pt	Color #e76f51 	Background color #2a9d8f 
Form section headers	Font Styles Default	Font sizes Default	Color <input type="text"/> 	Background color <input type="text"/> 

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

How to Enable Email Receipts

Email receipts can be enabled so that the person completing an external form receives a confirmation email. They can also be configured to notify the sender of the form, effectively acts as an alert when a form has been completed. To enable this feature:

- Hover over **My Account** and click on **Administration**.
- Select **External Forms** from the **Tools** menu, then select **External Questionnaires** from the menu on the left-hand side.

- Click on the **eye** icon to the right of the form you want to edit. 
- Select **Configuration – Email Receipts** from the menu on the left.
- In the **Status** field, select **On**, then choose the relevant email field(s) from the **Recipient Fields** list. This determines the address that will receive the confirmation email. *Note: the form must include an email field to use this feature.*
- Under **Sender Name** and **Sending Address**, enter the name and email address that should appear as the sender when the receipt is delivered.
- If you also want the sender of the form to receive a confirmation, set **Include Sender** to **On**, and enter the appropriate email address in the **Sender Address** list. You can enter multiple addresses, separated by commas.
- Under **Template**, select the email template to be used for receipts[†], then 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**.

[†] For instructions on creating templates, see the **How To Create Mail Templates** guide at <https://www.substance.net/wp-content/uploads/2024/01/How-to-Create-Mail-Templates.pdf>

- 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. 

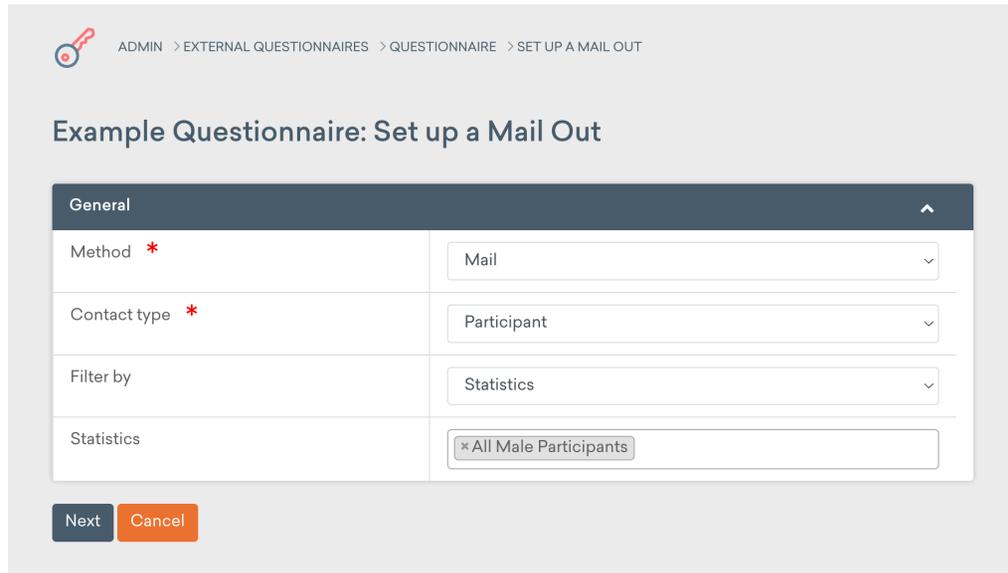


Sharing an External Questionnaire via a Mail Out

- 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**.



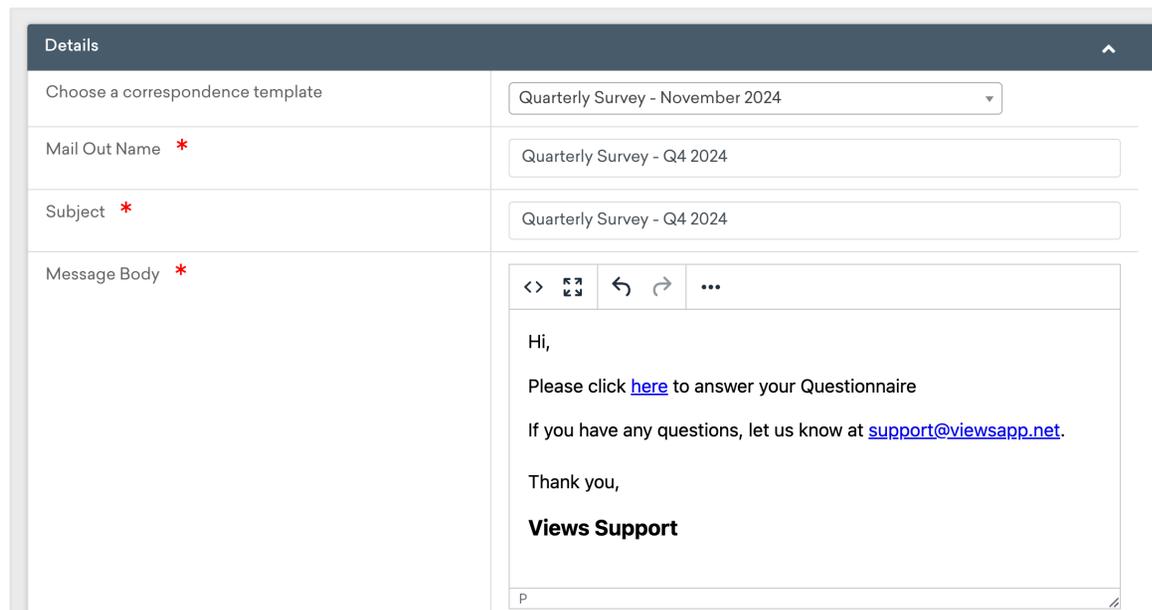
The screenshot shows a web interface for setting up a mail out. At the top, there is a breadcrumb trail: ADMIN > EXTERNAL QUESTIONNAIRES > QUESTIONNAIRE > SET UP A MAIL OUT. Below this is the title 'Example Questionnaire: Set up a Mail Out'. The main form is titled 'General' and contains four rows of settings:

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

At the bottom of the form are two buttons: 'Next' and '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.



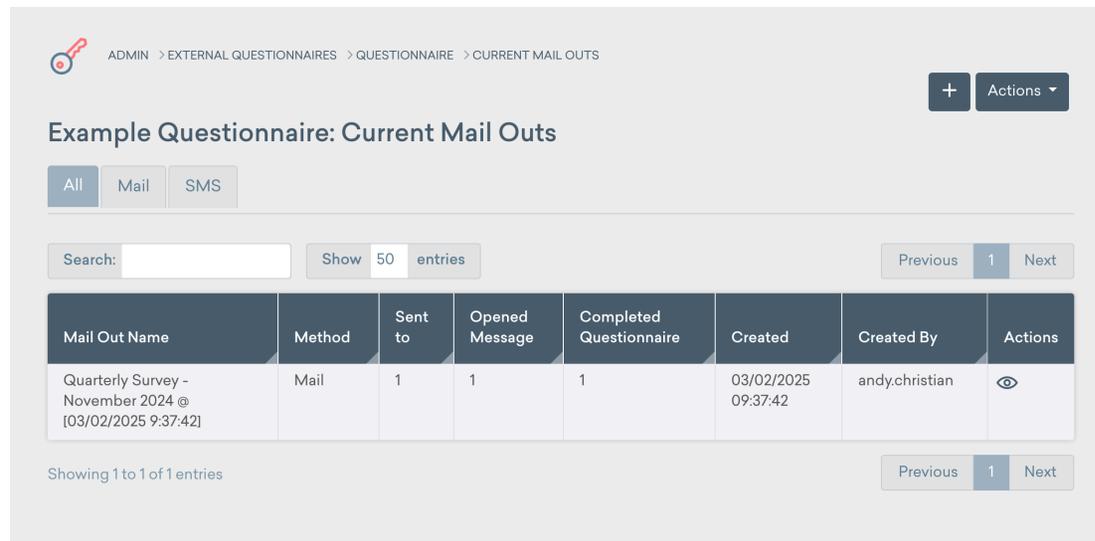
The screenshot shows a 'Details' form with the following fields and content:

Details	
Choose a correspondence template	Quarterly Survey - November 2024
Mail Out Name *	Quarterly Survey - Q4 2024
Subject *	Quarterly Survey - Q4 2024
Message Body *	<p><> [Rich Text Icons] [Undo] [Redo] [More]</p> <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> <p>P</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

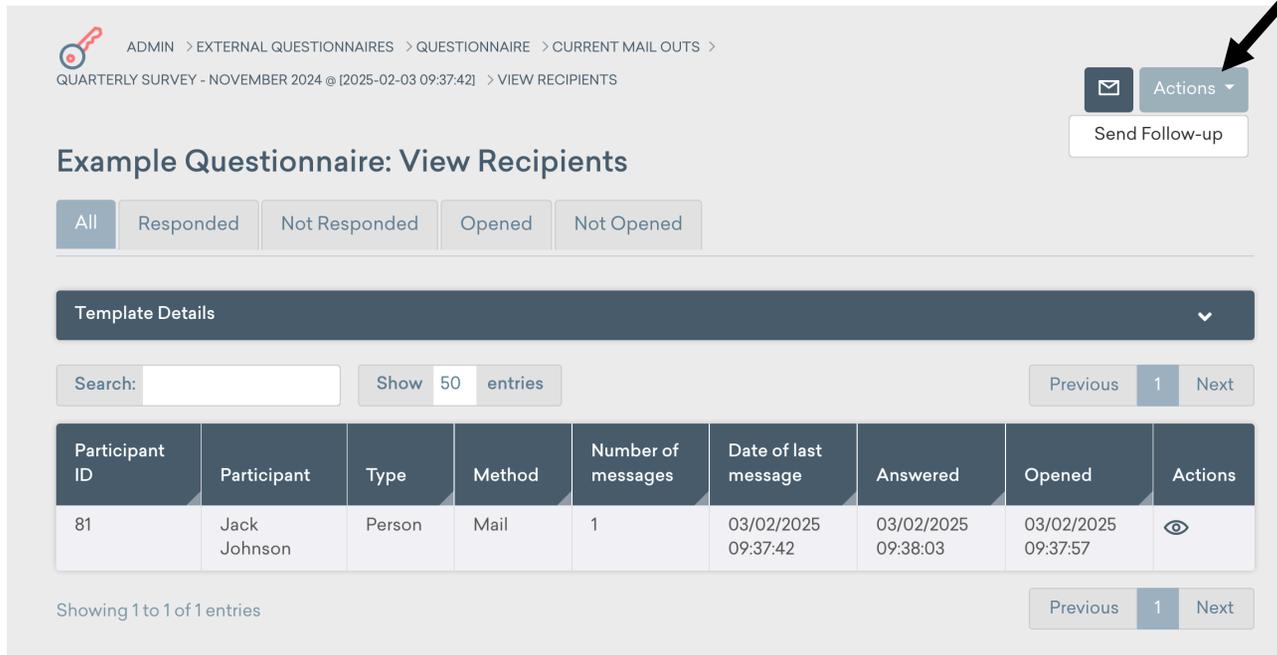
Search: Show 50 entries Previous 1 Next

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

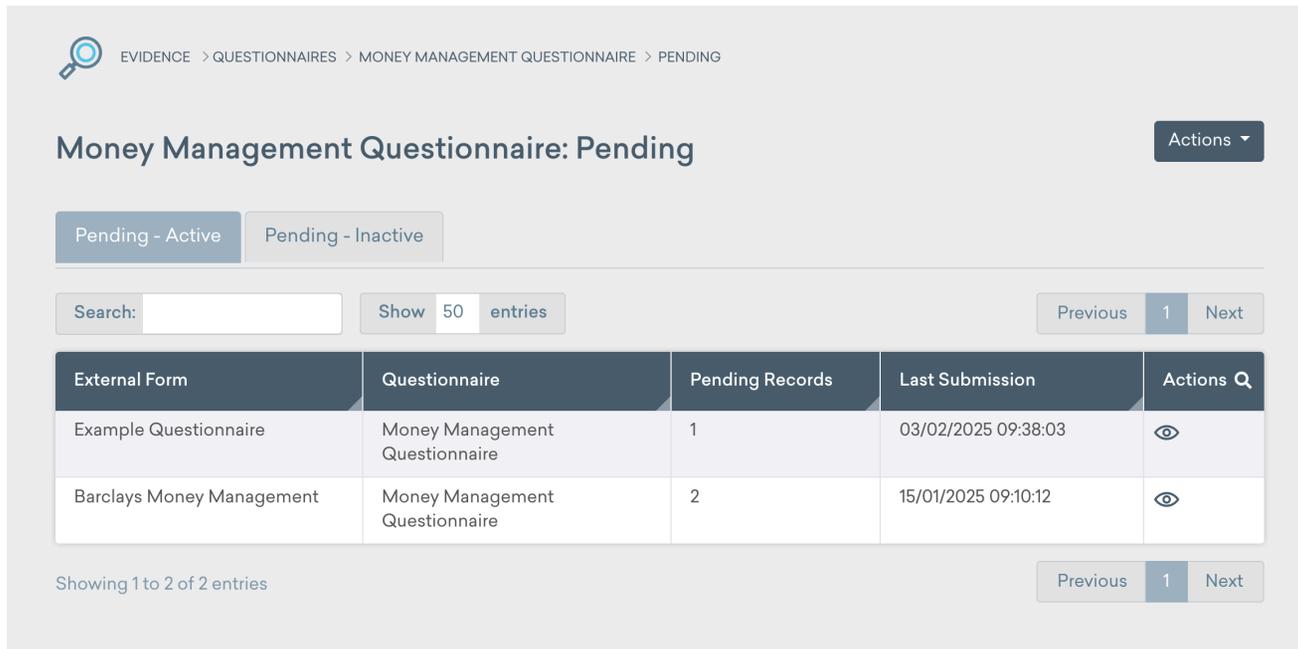
How to Process Pending Questionnaires

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 ▾

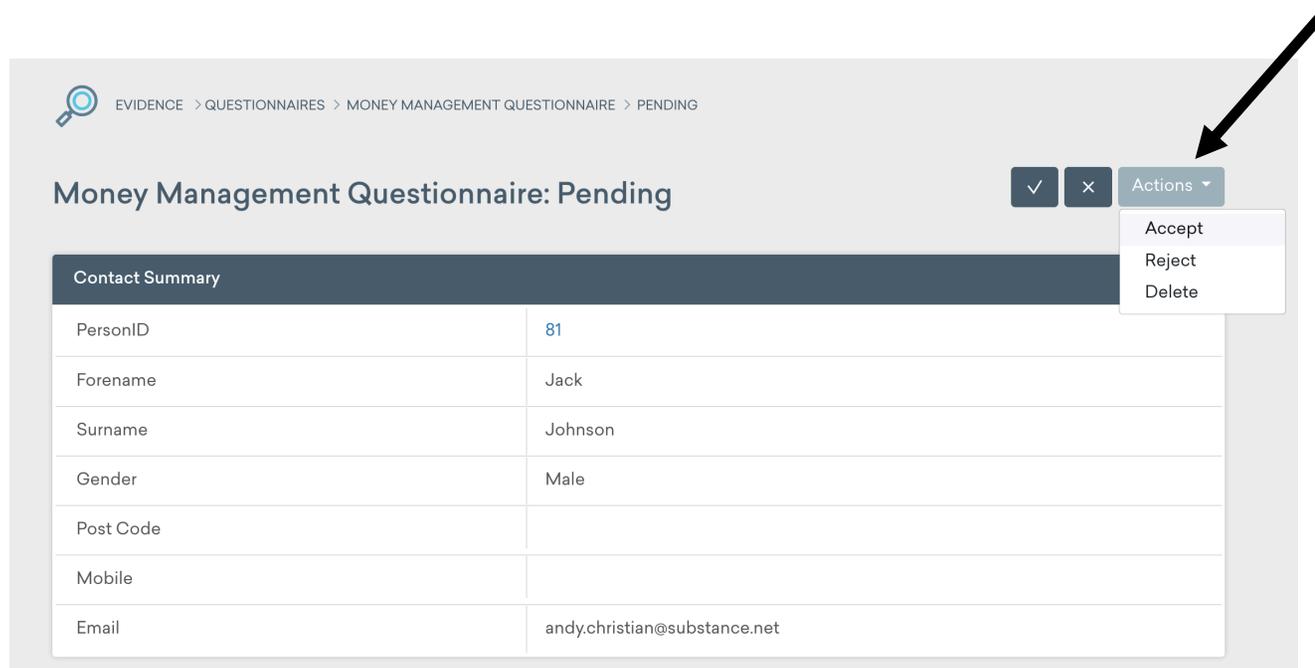
Pending - Active Pending - Inactive

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 * 

Time * 

Contact Association 

Contact Title 

Work Association 

Work Title 

- Once you've completed your review, click **Save** at the bottom of the page to add the form to your account.