How to Use the External Questionnaires Tool

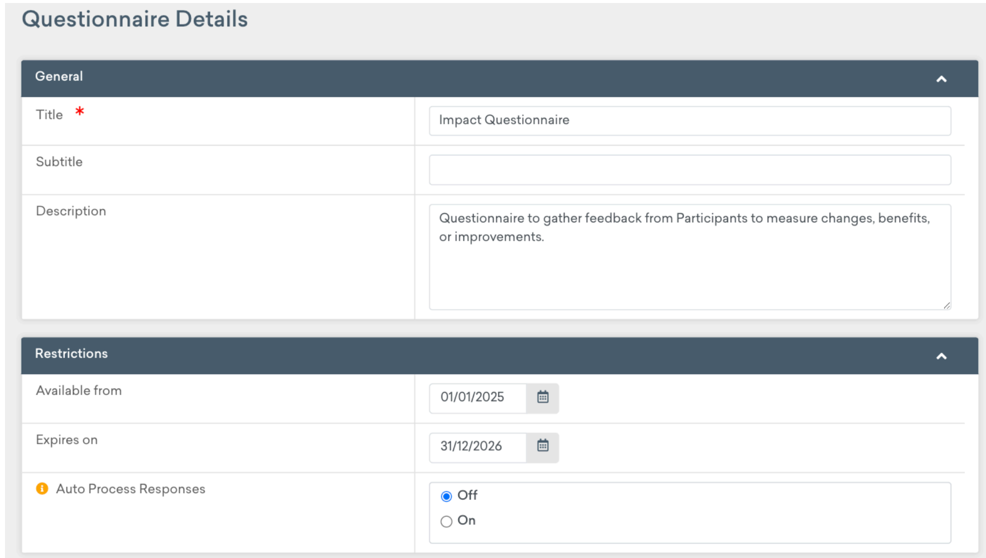
The **External Questionnaires** tool allows you to create an external version of a **Views Questionnaire**, which can be shared with external users **via email, SMS, web links,** or **QR codes**. Once completed, the forms are automatically sent back into **Views**, where you can review them and associate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

---

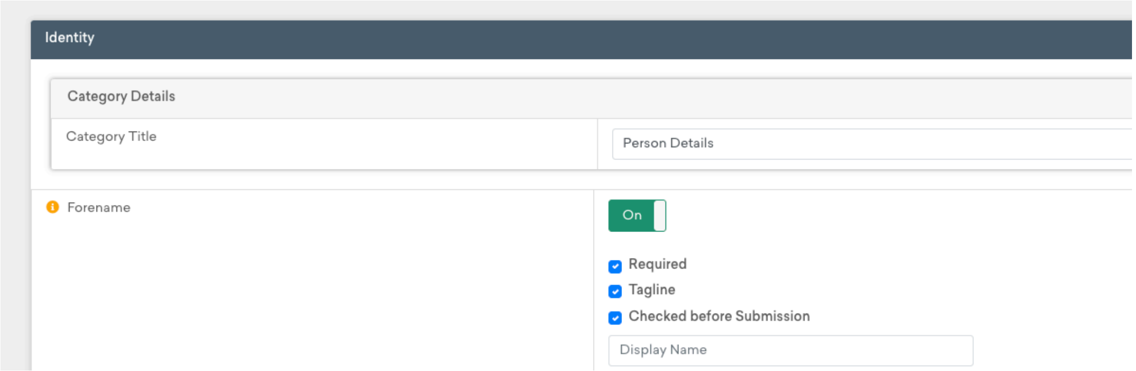
[*] Before creating an **External Questionnaire**, you must first add the questionnaire to your **Views** account. For guidance on this process, please refer to the **How to Create a Questionnaire** document at https://www.substance.net/evidence-section/.



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**.

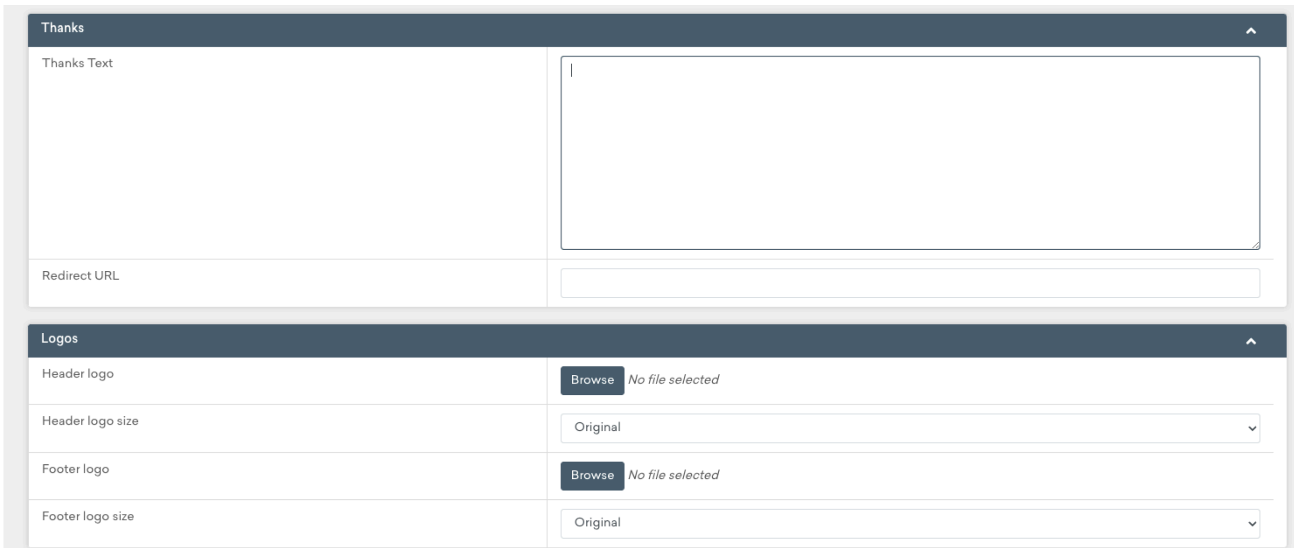
- To select the questionnaire's fields, toggle **On** next to the fields you want to include.
- Select **Required** if the field should be compulsory.
- If you enable **Checked before submission**, respondents will be asked to confirm their response to this field before saving.
- Click **Save** to confirm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



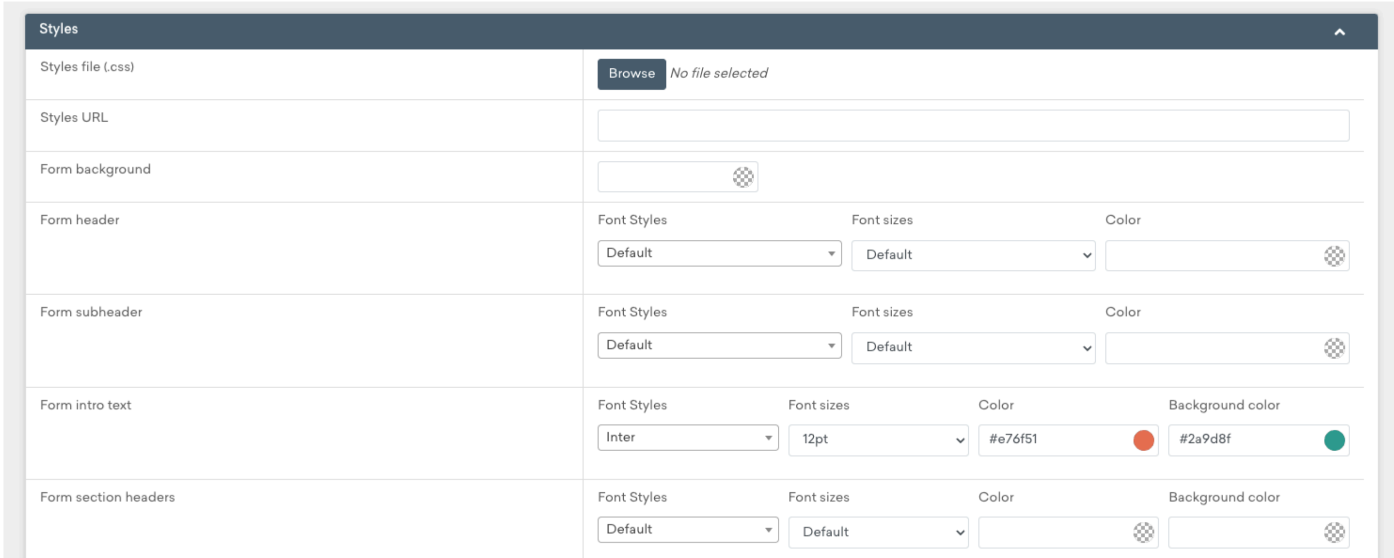
How to Apply Styling to an External Questionnaire

- 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.

- 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.



- 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.



- 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

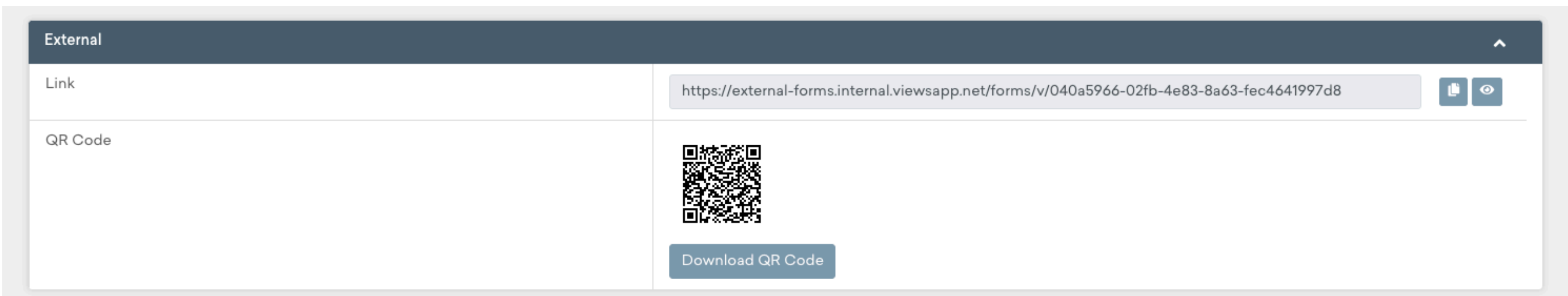
- Under the **Tools** section, select **External Forms**.

- 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.

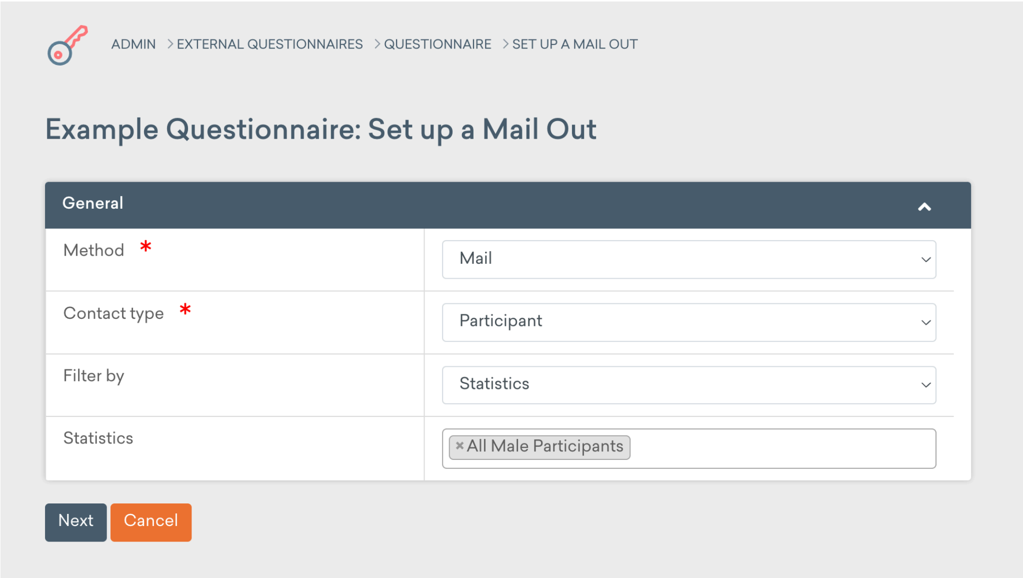
- From the subheadings on the left-hand side, select **Set Up Mail Out** from the **Mail Outs** menu.

- 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.

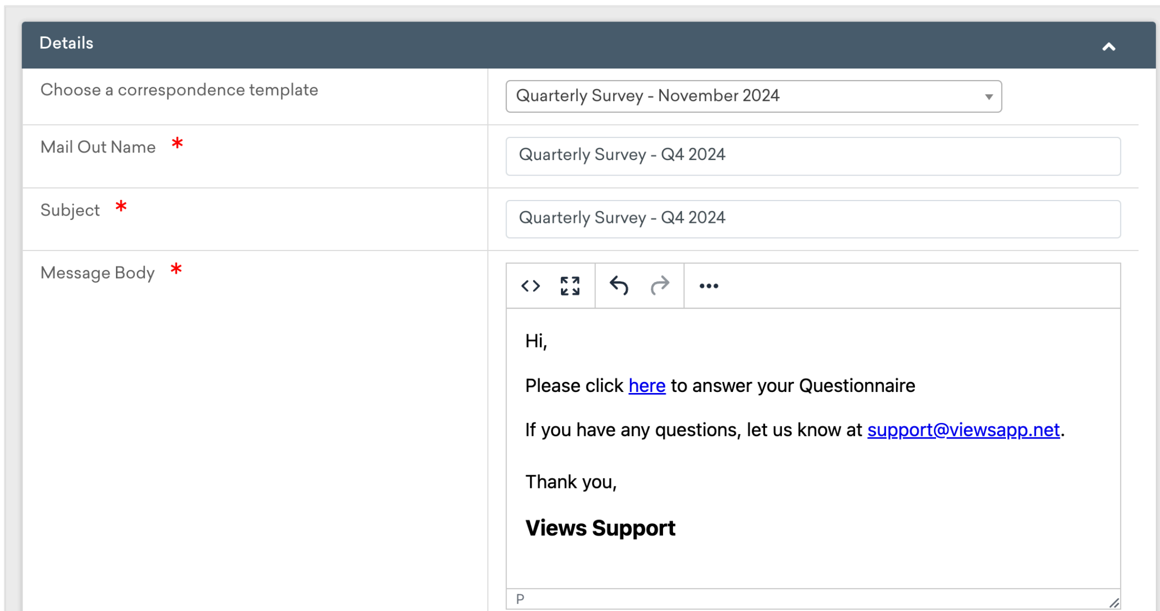
- In the **Filter By** field, select how you'd like to filter the list of contacts:

    - Filter by attendance at a **work strand**, such as an **Agency Project** or **Session Group**, or
    - Filter by inclusion in a **Statistic**.



‡ The **SMS Mail Outs** tool requires a **Views Premium** package.

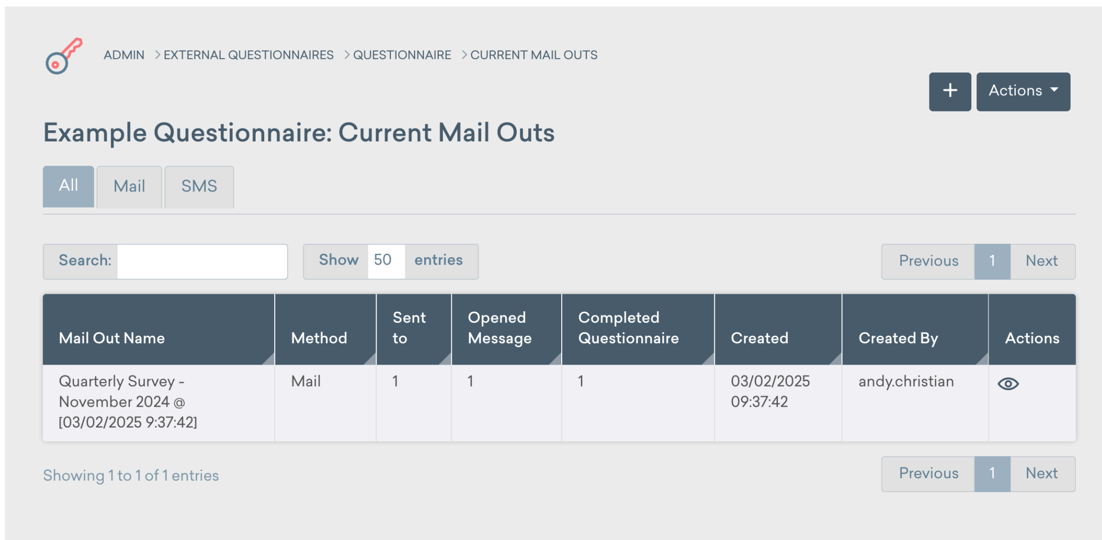
- Click **Next**.
- Tick the boxes next to the contact records you wish to include in the Mail Out.
- Click **Next**.
- Compose the message you'd like to send:
    - Choose a **pre-existing template** or
    - Write the message from scratch.



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

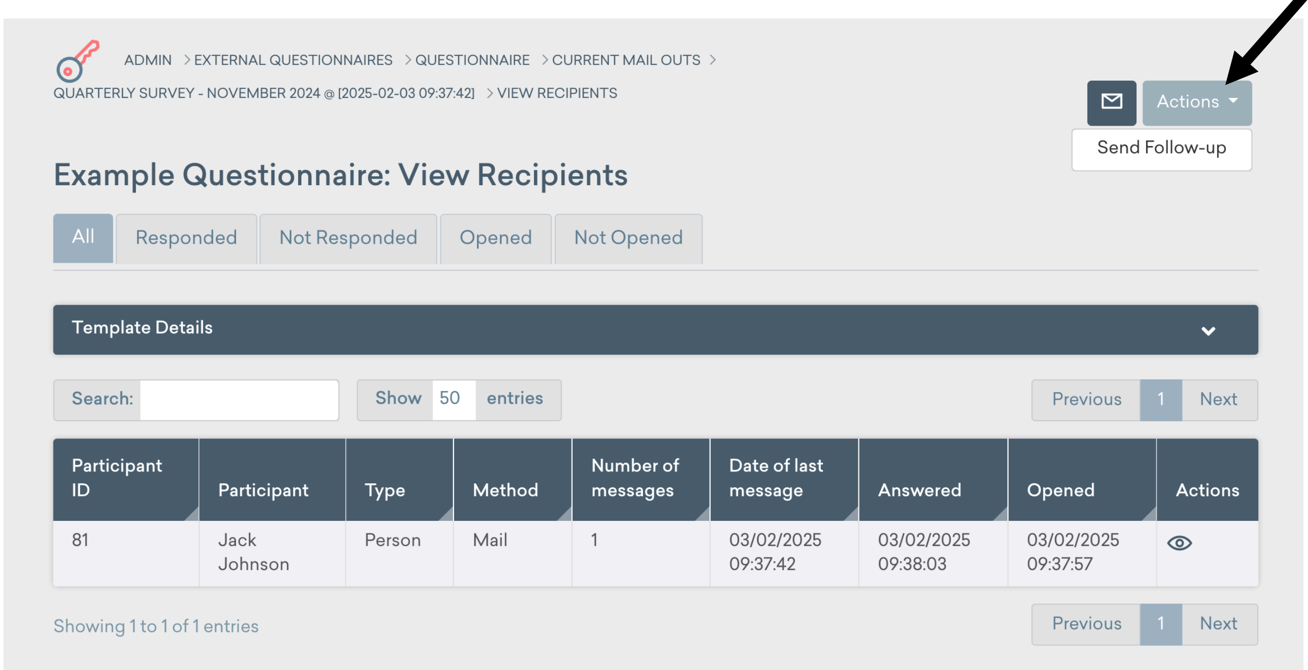
Reviewing and Managing Mail Outs

- 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.



- 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.



How to Process Pending Questionnaires

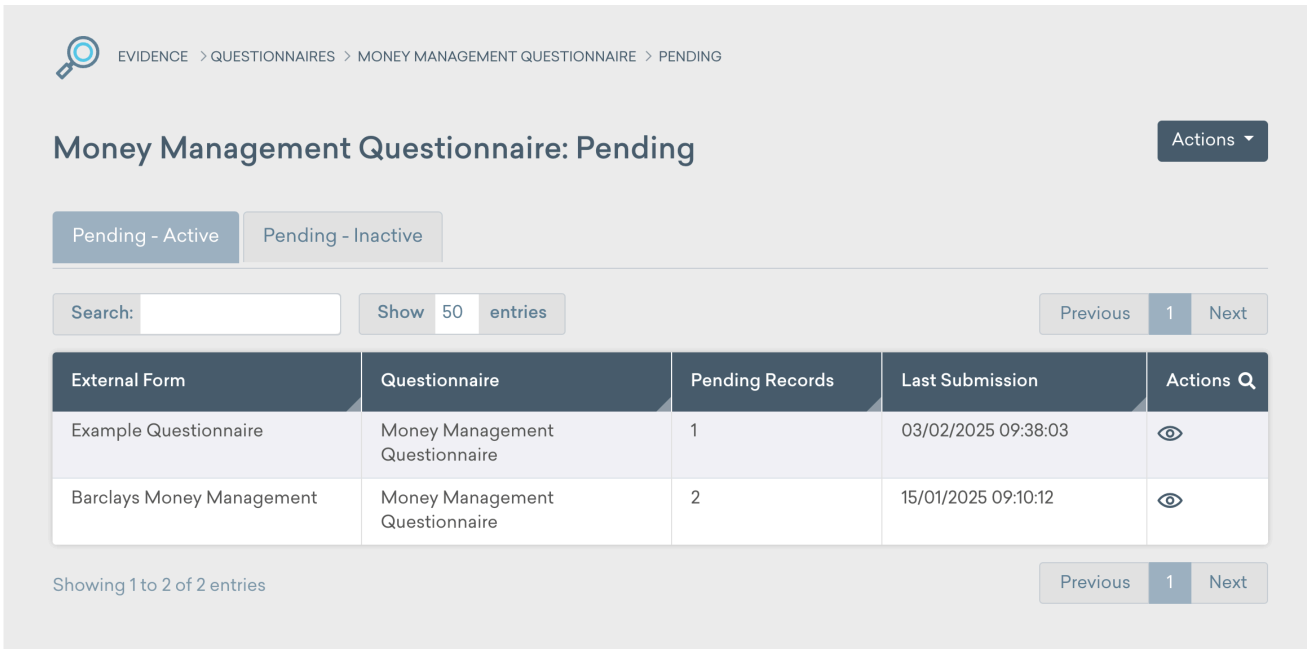
If an external questionnaire has **Auto Process Responses** set to **Off**, responses must be reviewed and manually accepted before they are added to your **Views** account.

To Accept a Pending Response:

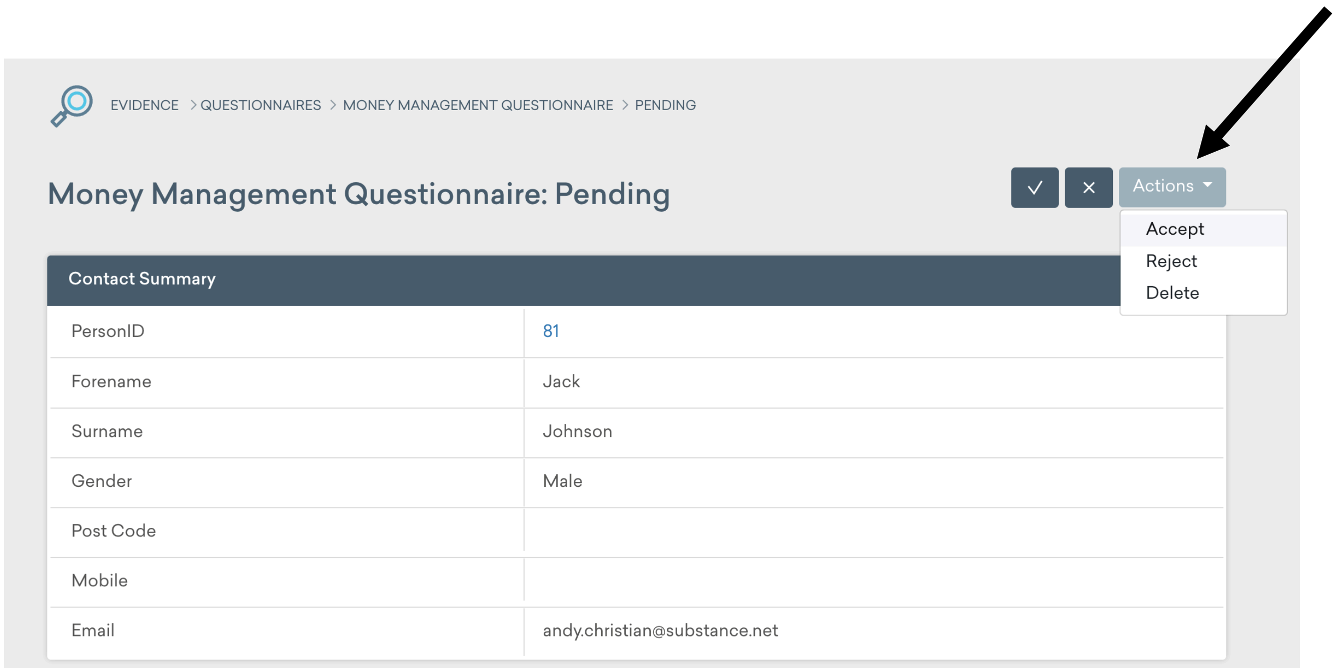
- Hover over **Evidence** and click **Questionnaires**.

Views

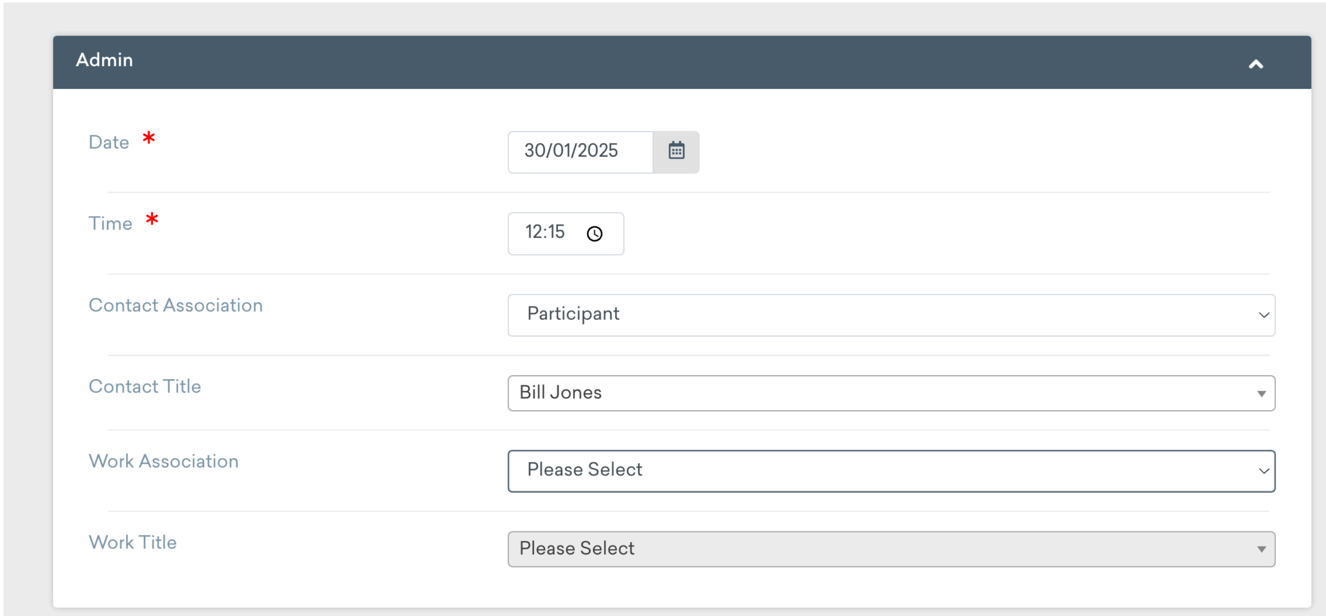
- Find the relevant questionnaire and click the **eye icon** to the right.
- From the menu on the left-hand side, select **Pending** under the **External Forms** category.
- A list of all external forms linked to this questionnaire will be displayed.



- 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.



- 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.



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