

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 **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

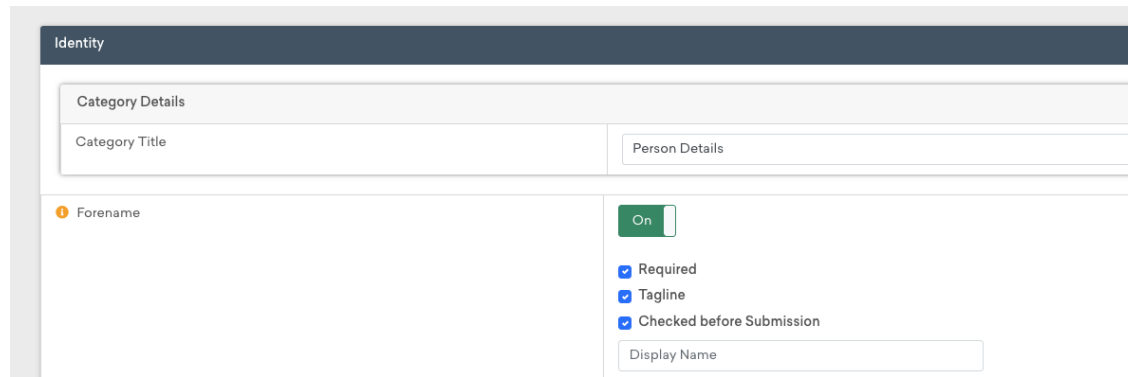
General	
Title *	Impact Questionnaire
Subtitle	
Description	Questionnaire to gather feedback from Participants to measure changes, benefits, or improvements.

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

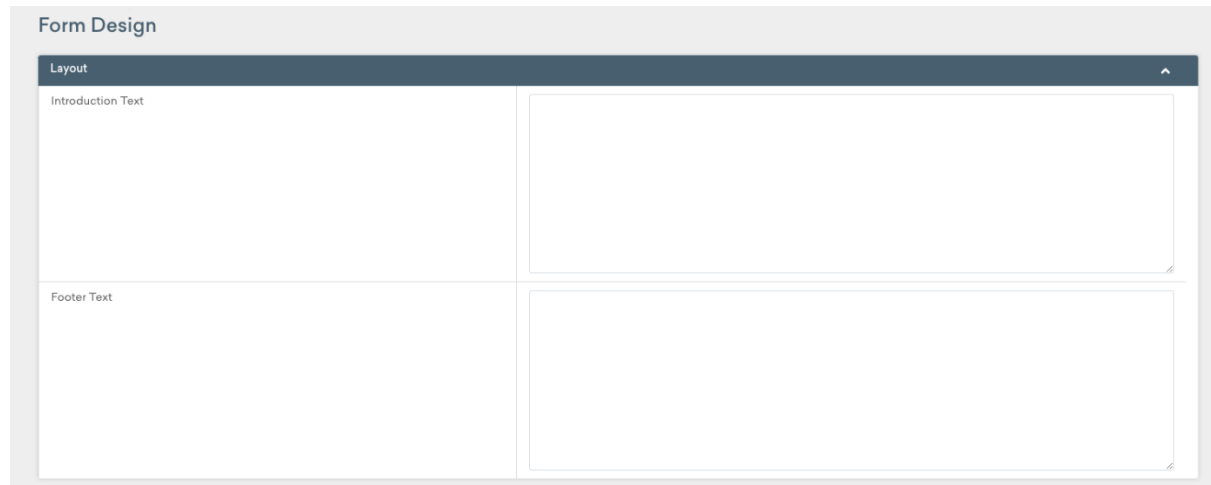
☒ Tagline

☒ 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.



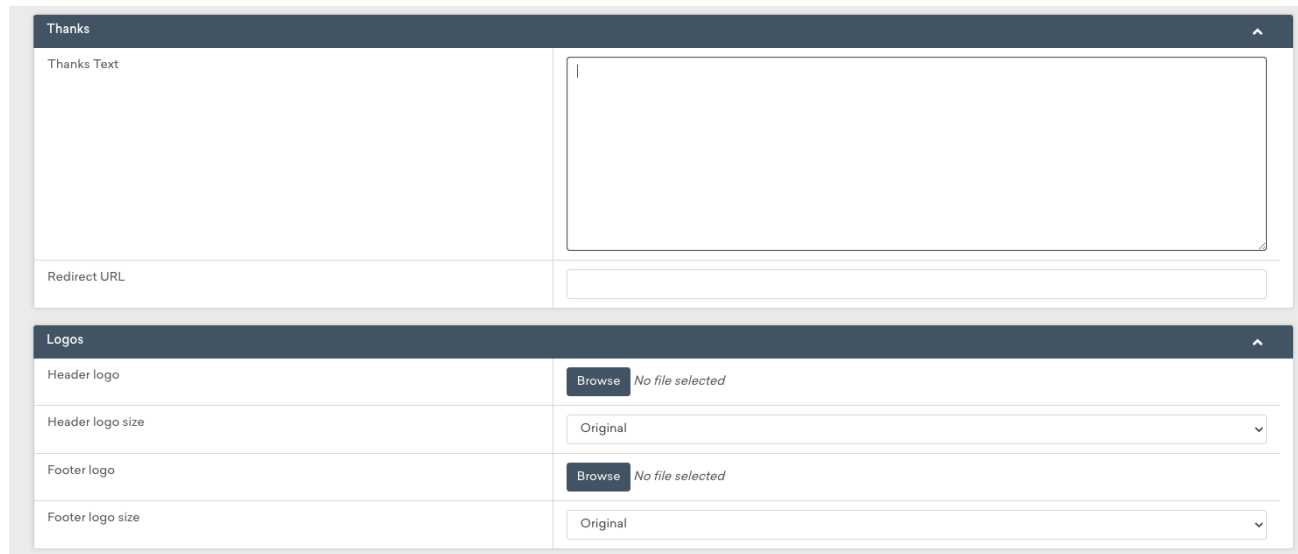
Form Design

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 panels. The top panel, titled 'Thanks', contains a 'Thanks Text' area with a large text input field, a 'Redirect URL' field, and a small text input field. The bottom panel, 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'.

- 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)	Browse No file selected			
Styles URL				
Form background				
Form header	Font Styles Default	Font sizes Default	Color 	
Form subheader	Font Styles Default	Font sizes Default	Color 	
Form intro text	Font Styles Inter	Font sizes 12pt	Color #e76f51	Background color #2a9d8f
Form section headers	Font Styles Default	Font sizes Default	Color 	Background color

- 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 **Evidence** and click **Questionnaires**.
- Select a **Questionnaire**
- Select **Forms** under **External Forms** 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 **Evidence** and click **Questionnaires**.

[†] 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>

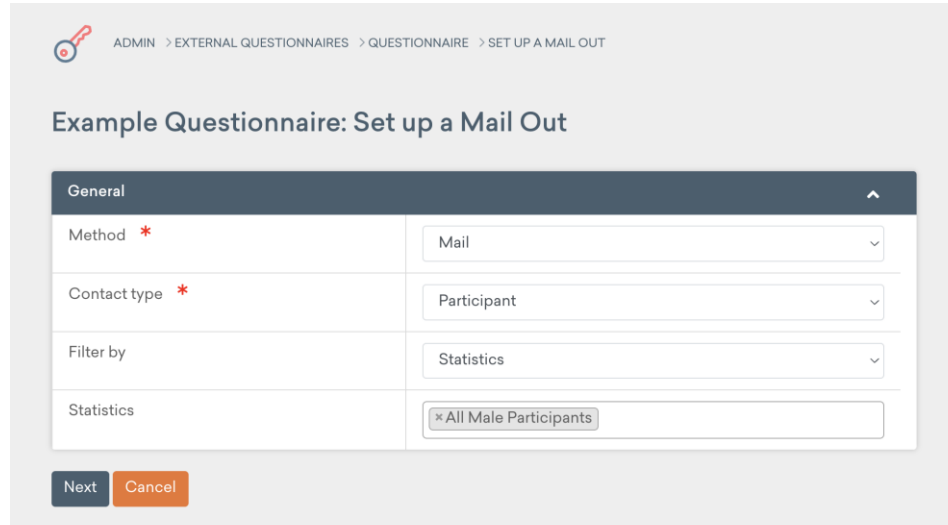
- Select a **Questionnaire**.
- From the subheadings on the left-hand side, select **Forms** under the **External Forms** tab.
- Click the **eye icon** next to the form. 
- The **weblink** will be displayed in the **Link** field, and the **QR code** will be shown in the **QR Code** field. These can be 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	https://external-forms.internal.viewsapp.net/forms/v/040a5966-02fb-4e83-8a63-fec4641997d8  
QR Code	 Download QR Code

Sharing an External Questionnaire via a Mail Out

- Hover over **Evidence** and click **Questionnaires**.
- Select the **Views Questionnaire**.
- Click the **eye icon** next to the form.

- From the subheadings on the left-hand side, select **Forms** under the **External Forms** tab
- 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 for an example questionnaire. The breadcrumb trail at the top is: 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 and a 'Statistics' section. The 'General' section contains three dropdown menus: 'Method' (set to 'Mail'), 'Contact type' (set to 'Participant'), and 'Filter by' (set to 'Statistics'). The 'Statistics' section contains a text input field with the value '* All Male Participants'. At the bottom of the form are two buttons: 'Next' and 'Cancel'.

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.
- 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

 Actions 

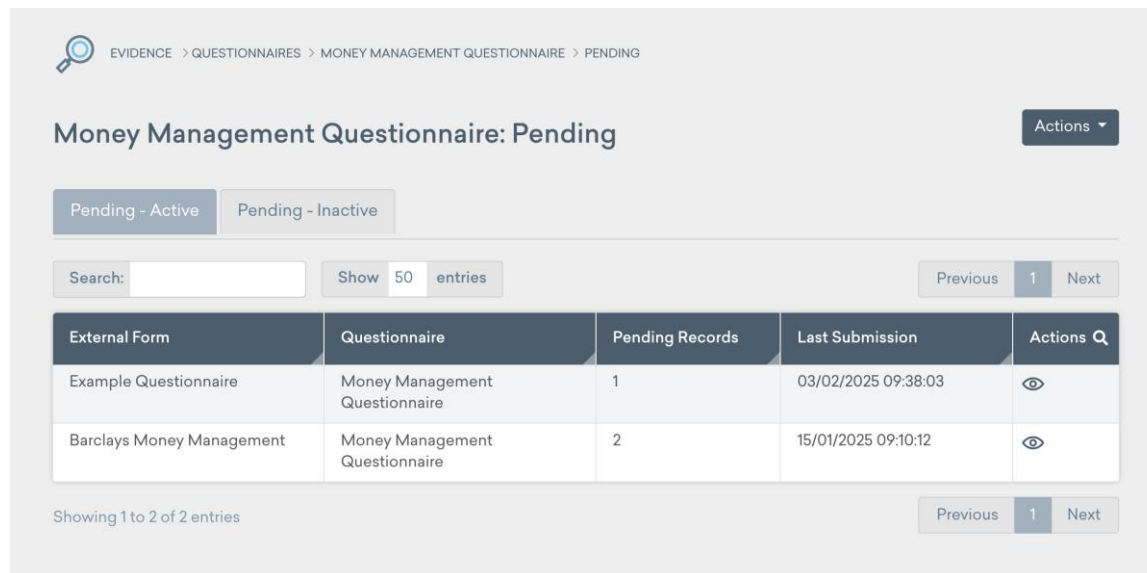
Send Follow-up

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.

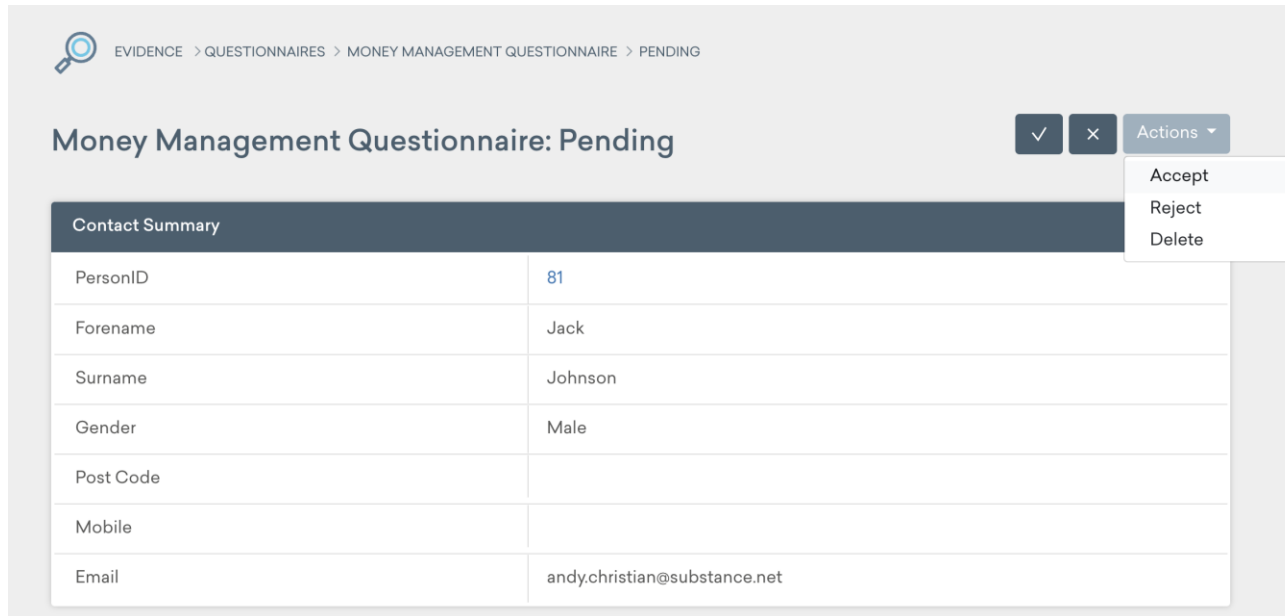


The screenshot shows the 'Money Management Questionnaire: Pending' page. At the top, there is a breadcrumb trail: EVIDENCE > QUESTIONNAIRES > MONEY MANAGEMENT QUESTIONNAIRE > PENDING. Below this, the title 'Money Management Questionnaire: Pending' is displayed, followed by an 'Actions' dropdown menu. There are two tabs: 'Pending - Active' (selected) and 'Pending - Inactive'. Below the tabs, there is a search bar, a 'Show 50 entries' button, and pagination controls showing 'Previous', '1', and 'Next'. The main content is a table with the following data:

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	

At the bottom, it says 'Showing 1 to 2 of 2 entries' and has another set of pagination controls: 'Previous', '1', and '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

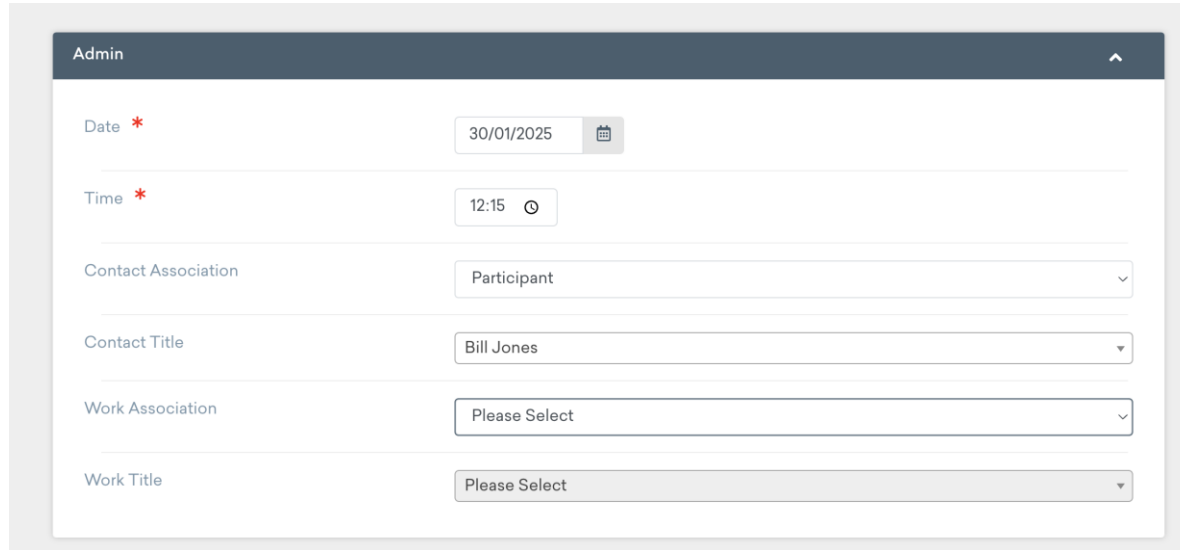
✓ × Actions ▾

- 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.

A screenshot of the 'Admin' section in a web application. The form is titled 'Admin' in a dark header bar. It contains several input fields: 'Date' with a red asterisk and a date picker showing '30/01/2025'; 'Time' with a red asterisk and a time picker showing '12:15'; 'Contact Association' with a dropdown menu showing 'Participant'; 'Contact Title' with a dropdown menu showing 'Bill Jones'; 'Work Association' with a dropdown menu showing 'Please Select'; and 'Work Title' with a dropdown menu showing 'Please Select'. The form is set against a light gray background.

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.