

Survey and Questionnaire Example Setup

Provided below is the field setup and layouts for three tables using these data types for a straightforward set of surveys.

Survey Questions

Key fields in this table are the Question Description and Question Name fields. Although the Question Name field is helpful, it isn't necessary to build a functioning survey.

Question

Linked Surveys

History

<<>>

Question Name

Overall Satisfaction

Question

Please rate your overall satisfaction with the support experience.

Edit Question

Answer Details

Satisfaction choices: Very Satisfied to Very Dissatisfied

Example question

List of Fields

Field Label	Data Type	Admin Notes
Answer Details	Text	Used to provide answer type and choices, default values, and ranges so the table view can provide information about the answer as well as just the question. Maximum size: 1000; Display size: 90x2
Communications	Communications Search Result	

Created By, Creator Login, Creator Team	Link to selected fields from other table: Contacts Allow multiple values: No Allow entries not in source table: No	
Date Created	Date/Time	
Date Updated	Date/Time	
History	History	
ID	Auto-Increment	
Linked Survey Name	Link to selected fields from other table: Survey Types Allow multiple values: No Allow entries not in source table: No	
Question	Question Description Field	This field is used to define questions and answer types in a normal table record.
Question Name	Short Text	Repeats the question so it can be shown on a table view. Maximum size: 255; Display size: 90x1
Survey Types	Related Table: Survey Types	This related table will show all Survey Types associated with a question.
Updated By, Updater Login, Updater Team	Link to selected fields from other table: Contacts Allow multiple values: No Allow entries not in source table: No	

Survey Types

Key fields in this table are the Survey Definition and Survey Name fields. The Survey Name makes it easier to reference the survey by name elsewhere in the system.

DetailsHistory<>

Collapse All

Survey Name

Service Request

Survey Definition

service_request_survey:

How would you rate the timeliness of support?

How would you rate the knowledge of our support staff?

Please rate the overall quality of the support you received.

Please rate your overall satisfaction with the support experience.

Please provide any suggestions on how we can improve.

Edit Survey

Survey Type example

List of Fields

Field Label	Data Type	Admin Notes
Created By, Creator Login, Creator Team	Link to selected fields from other table: Contacts Allow multiple values: No Allow entries not in source table: No	
Date Created	Date/Time	
Date Updated	Date/Time	
History	History	
ID	Auto-Increment	
Survey Definition	Survey Definition Field	This field defines the set of questions for each survey type (Survey Name)

Survey Name	Short Text	This field is used so that the surveys can be referenced by name elsewhere in the system. Maximum size: 70; Display size: 30x1
Updated By, Updater Login, Updater Team	Link to selected fields from other table: Contacts Allow multiple values: No Allow entries not in source table: No	

Surveys

This is the main table where the surveys are collected. The survey is shared using a hotlink in an email template in the other process tables. The hotlink creates a new Survey record using a Guest account, so a rule automatically runs when a Survey is created in order to update the Submitter Name based on information in the linked record from the process table.

Survey Questions

Reset

How would you rate the timeliness of support?

Excellent

Very Good

Good

Fair

Poor

How would you rate the knowledge of our support staff?

Excellent

Very Good

Good

Fair

Poor

Please rate the overall quality of the support you received.

Excellent

Very Good

Good

Fair

Poor

Please rate your overall satisfaction with the support experience.

Very Satisfied

Somewhat Satisfied

Neutral

Somewhat Dissatisfied

Please provide any suggestions on how we can improve.

Survey Question section of a survey

List of Fields

Field Label	Data Type	Admin Notes
Communications	Communications Search Result	

Created By, Creator Login, Creator Team	<p>Link to selected fields from other table: Contacts</p> <p>Allow multiple values: No</p> <p>Allow entries not in source table: No</p>	
Date Created	Date/Time	
Date Updated	Date/Time	
Definition ID, Show Extra Fields, Survey Definition, Survey Type	<p>Link to selected fields from other table: Survey Types</p> <p>Allow multiple values: No</p> <p>Allow entries not in source table: No</p>	This linked set will be used to determine which set of questions to be displayed along with any additional fields to be displayed
History	History	
ID	Auto-Increment	
Linked Company	<p>Link to selected fields from other table: Companies</p> <p>Allow multiple values: No</p> <p>Allow entries not in source table: No</p>	This linked field can be used to display related Surveys in the associated Company record. Default: Linked Company matches Submitter Company
SC Assigned Person, SC Assigned Team, SC Customer Name, SC Customer Phone, SC Date Closed, Support Case ID, SC Priority, SC Summary, SC User Company, SC Assigned Team /Person	<p>Link to selected fields from other table: Support Cases</p> <p>Allow multiple values: No</p> <p>Allow entries not in source table: No</p>	Fields populated from the related Support Case. Visible if "Show Extra Fields" is Support Case

SR Assigned Person, SR Assigned Team, Service Request ID, SR Priority, Service Requested, SR Submitter Login, SR Submitter Name, SR Submitter Phone, SR Summary	<p>Link to selected fields from other table: Service Requests</p> <p>Allow multiple values: No</p> <p>Allow entries not in source table: No</p>	
Submitter Company, Submitter Phone, Submitter Email, Submitter Name, Submitter Team	<p>Link to selected fields from other table: Contacts</p> <p>Allow multiple values: No</p> <p>Allow entries not in source table: No</p>	Direct link to user fields for person who submitted the survey, populated by a rule from the related record.
Survey Questions	Survey Presentation Field	This field will be used to select the question for a particular survey or questionnaire as well as the defining the order, visibility dependencies and requirements.
Updated By, Updater Login, Updater Team	<p>Link to selected fields from other table: Contacts</p> <p>Allow multiple values: No</p> <p>Allow entries not in source table: No</p>	