

Add-ons Example: Creating a customer satisfaction survey

This example shows how to create a customer satisfaction survey which displays different form elements depending on how the visitor answers. The survey is for a coffee shop that wants to know what their customers like, and don't like, about their services.

The form contains three steps. The first step collects basic personal information (name and email address), the second step is for collecting customer opinions, and in the third step, a visitor can participate in a photo challenge by uploading a photo taken at the coffee shop.

In the second step, which collects customer opinions, some form elements are dependent on another form element. This means that if a visitor answers "Food" to the question "What's your favorite thing about the Coffee House?", an additional question is displayed. The additional question "Which food you like in particular?" is not displayed if the visitor picks "Staff", "Ambiance", or "Drinks" on the first question.

Your opinions

What's your favorite thing about the Coffee House?

Staff

Ambiance

Food

Drinks

Which food do you like in particular?

The example uses the following form elements: **Form step**, **Text**, **Text area**, **Multiple or single choice**, **Selection**, **File upload**, **Hidden predefined value**, and **Submit button**. See **Form element types** for more information.



All form elements and the form container itself must be published to be available. You can use **the projects feature** to keep track of all items and to multi-publish them.

1. From the assets pane, select the **Forms** tab.
2. Browse to a folder where you want to save the form, or create a new folder by selecting **New Folder** from the context menu.
3. From the folder's context menu, select **New Form** and give it a name such as *Customer satisfaction survey*.

4. Go to the All Properties view and edit the form container settings as follows:

Property	Configuration
Form title	Give the form the title <i>Customer satisfaction survey</i> .
Description	Enter the description <i>Take our survey!</i>
Allow multiple submissions from the same IP/cookie	Select this check box if you want to be able to test the form yourself multiple times, or if you want to allow visitors to send in the survey more than once.
Show navigation bar...	Select the Show navigation bar... check box.

Name	<input type="text" value="Customer satisfaction sur"/>	Visible to	Everyone Manage
		Languages	en
		ID, Type	142, Form container
			<input type="button" value="Tools"/> ▾

Content	Settings
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Form title	<input type="text" value="Customer satisfaction sur"/>
Description	<div style="border: 1px solid #ccc; padding: 5px; min-height: 80px;">Take our survey!</div>
	<input type="checkbox"/> Show a summary confirmation message after submission
Confirmation message	<div style="border: 1px solid #ccc; padding: 5px; min-height: 80px;">Thank you for letting us know what you think!</div>
Display page after submission	<input type="text" value=""/> <input type="button" value="..."/>
Display message after form submission (not displayed if redirecting)	<div style="border: 1px solid #ccc; padding: 5px;"><div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;">Paragraph ▾ B <i>I</i>          </div><div style="min-height: 150px;"></div></div>
	<input type="checkbox"/> Allow anonymous submissions
	<input type="checkbox"/> Allow multiple submissions from the same IP/cookie
	<input checked="" type="checkbox"/> Show navigation bar if the form has multiple steps
	<input type="checkbox"/> Allow access to form data through the service API
Form elements	<div style="border: 1px solid #ccc; padding: 10px; text-align: center;"> You can drop form elements here or browse.</div>
Category	<input type="text" value="Add one or more categories"/> <input type="button" value="..."/>

5. Drag and drop the following form elements onto the Form elements section in the new form container. Change the elements as follows (add your own **Tool-tips** and **Placeholder** text) and publish each element:

Form element	Configuration
Form step	Label the form step <i>Basic personal information</i> . (<i>Name</i> is what the form element is called in the CMS user interface; <i>Step title</i> is what is displayed to the visitor filling in the form.)
Text	Label the form element <i>Your name</i> . Select the Required check box.
Text	Label the form element <i>Your email address</i> . Select the Email check box.
Form step	Label the form step <i>Your opinions</i> .
Multiple or single choice	<p>Adjust the settings of the form element as follows:</p> <ul style="list-style-type: none"> • Name the element: <i>Best thing about the Coffee House</i> • Label text: <i>What's your favorite thing about the Coffee House?</i> • Select the Required check box. • Under Choices, select Use manual input and add the following items by clicking the + sign (set Value to the same as Choice): <ul style="list-style-type: none"> ○ Choice: <i>Staff</i> ○ Choice: <i>Ambiance</i> ○ Choice: <i>Food</i>

Form element	Configuration						
	<ul style="list-style-type: none"> ◦ Choice: <i>Drink</i> 						
<p>Selection</p>	<p>Adjust the settings of the form element as follows:</p> <ul style="list-style-type: none"> • Name the element: <i>Best food</i> • Label text: <i>Which food do you like in particular?</i> • Select the Required check box. • Under Choices, select Use manual input and add the following items by clicking the + sign (set Value to the same as Choice): <ul style="list-style-type: none"> ◦ Choice: <i>The pizzas</i> ◦ Choice: <i>Fish & chips</i> ◦ Choice: <i>Tuna & majo sandwich</i> ◦ Choice: <i>The velvet cake of course!</i> • In the Dependencies tab, set: <ul style="list-style-type: none"> ◦ This field will be to <i>Shown</i> ◦ If to <i>All</i> ◦ Add a condition like this: <div data-bbox="671 1318 1390 1661" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <div style="display: flex; border-bottom: 1px solid #ccc;"> Content Settings Dependencies </div> <p>This field will be Shown ▾</p> <p>if All ▾</p> <p>of the following conditions satisfied:</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-bottom: 5px;">+</div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr style="background-color: #e6f2e6;"> <th style="text-align: left;">Field</th> <th style="text-align: left;">Condition</th> <th style="text-align: left;">Value</th> </tr> </thead> <tbody> <tr> <td>Best thing about the Coffee House</td> <td>Equals</td> <td>Food</td> </tr> </tbody> </table> </div> 	Field	Condition	Value	Best thing about the Coffee House	Equals	Food
Field	Condition	Value					
Best thing about the Coffee House	Equals	Food					
<p>Multiple</p>	<p>Adjust the settings of the form element as follows:</p>						

Form element	Configuration						
<p>or single choice</p>	<ul style="list-style-type: none"> • Name the element: <i>Worst thing about the Coffee House</i> • Label text: <i>What don't you like at the Coffee House?</i> • Select the Required check box. • Under Choices, select Use manual input and add the following items by clicking the + sign (set Value to the same as Choice): <ul style="list-style-type: none"> ○ Choice: <i>Staff</i> ○ Choice: <i>Food</i> ○ Choice: <i>Drink</i> ○ Choice: <i>Nothing, everything is perfect</i> 						
<p>Text area</p>	<p>Adjust the settings of the form element as follows:</p> <ul style="list-style-type: none"> • Name the element: <i>Food complaints</i> • Label text: <i>You said you didn't like our food, why?</i> • In the Dependencies tab, set: <ul style="list-style-type: none"> ○ This field will be to <i>Shown</i> ○ If to <i>All</i> ○ Add two conditions like this: <div data-bbox="671 1375 1390 1717" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Content Settings Dependencies</p> <p>This field will be Shown ▾</p> <p>if All ▾</p> <p>of the following conditions satisfied:</p> <p>+</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #e8f5e9;"> <th>Field</th> <th>Condition</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Worst thing about the Coffee House</td> <td>Equals</td> <td>Food</td> </tr> </tbody> </table> </div>	Field	Condition	Value	Worst thing about the Coffee House	Equals	Food
Field	Condition	Value					
Worst thing about the Coffee House	Equals	Food					

Form element	Configuration						
<p>Form step</p>	<p>Label the form element <i>Competition</i>.</p>						
<p>Multiple or single choice</p>	<p>Label the form element <i>Do you want to participate in our photo challenge and win a dinner for two? (optional)</i></p> <ul style="list-style-type: none"> • Name the element: <i>Photo challenge</i> • Label text: <i>Do you want to participate in our photo challenge and win a dinner for two? (optional)</i> • Under Choices, select Use manual input and add the following items by clicking the + sign (set Value to the same as Choice): <ul style="list-style-type: none"> ○ Choice: <i>Yes</i> ○ Choice: <i>No</i> 						
<p>File upload</p>	<ul style="list-style-type: none"> • Label the form element <i>Upload your photo here</i> and set allowed file extensions and a maximum upload size. • In the Dependencies tab, set: <ul style="list-style-type: none"> ○ This field will be to <i>Shown</i> ○ If to <i>All</i> ○ Add a condition like this: <div data-bbox="673 1446 1390 1770" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Content Settings Dependencies</p> <p>This field will be Shown</p> <p>if Any</p> <p>of the following conditions satisfied:</p> <p>+</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="text-align: left;">Field</th> <th style="text-align: left;">Condition</th> <th style="text-align: left;">Value</th> </tr> </thead> <tbody> <tr> <td>Photo challenge</td> <td>Equals</td> <td>Yes</td> </tr> </tbody> </table> </div>	Field	Condition	Value	Photo challenge	Equals	Yes
Field	Condition	Value					
Photo challenge	Equals	Yes					

Form element	Configuration
Submit button	Label the button <i>Submit your opinions.</i>

6. Publish the form container.

For All Sites > Episerver Forms > Customer satisfaction >
Customer satisfaction survey Options

The block 'Customer satisfaction survey' when displayed as Full

Customer satisfaction survey

Take our survey!
Form elements

Basic personal information

Your name

Your email address

Your opinions

What's your favorite thing about the Coffee House?

- Staff
- Ambiance
- Food
- Drinks

Which food do you like in particular?

What don't you like at the Coffee House?

- Staff
- Food
- Drinks
- Nothing, everything is perfect

You said you don't like our food, why?

Competition

Do you want to participate in our photo challenge and win a dinner for two? (optional)

- Yes
- No

Upload your photo here No file chosen

 You can drop form elements here or [browse](#).

7. Drag the *Customer satisfaction survey* form onto a web page and publish the page.

Test your form

To test your form, go to the page on the website and enter data into the form on the page in View mode.

1. In the first step, add a name and an email address. Click **Next Step**.
2. Select **Food**, and note that a new question is displayed, *Which food do you like in particular?*. Select one of the options.
3. Under *What don't you like at the Coffee House?*, select **Food** and note that a free-text field is displayed. Enter a comment in the text box and click **Next Step**.
4. Select **Yes** to participate in the photo challenge and upload a photo. Click **Submit**. When you submit the data, it is stored in Episerver.

View form submissions

To view the results of your test, go to your *Customer satisfaction survey* form in the assets pane and select **Form submissions** from the context menu. The **Form submissions** view appears with data submitted from the form.

Name	Email	Best thing ab...	Best food	Worst thing a...	Food complai...	Photo challen...	File upload	Hidden prede...	Hidden visito...	Submitte...	Time	By user	Finalized
<input type="checkbox"/> Sophia Warner	sophia@epi.c...	Food	The velvet ca...	Food	I think you s...	No				Customer feedback	2018-06-27, ...	admin	✓
<input type="checkbox"/> Bert Kowalew...	bert@abc.com	Staff		Drinks		No				Customer feedback	2018-06-28, ...	admin	✓
<input type="checkbox"/> Wendy Torres	wendy@doe...	Ambiance		Food	It's always to...	Yes	safe.jpg			Customer feedback	2018-06-28, ...	admin	✓

If you want to find all visitors who wanted to participate in the photo challenge, you can either sort the form submissions by clicking on the Photo challenge column, or by searching for the answer Yes in that column:

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Yes Photo challenge from date To date Finalized Only

Search

<input type="checkbox"/>	Name	Email	Best thing ab...	Best food	Worst thing a...	Food complai...	Photo challen...	File upload	Hidden prede...	Hidden
<input type="checkbox"/>	Wendy Torres	wendy@doe....	Ambiance		Food	It's always to...	Yes	cafe.jpg		