# Defining questionnaire

Questionnaires allow for collecting additional information about employees and customers/vendors which can later be used in sales processes, e.g. when creating new <<opportunities>>.

A questionnaire is composed of a list of questions which can be defined from the level of:

- *Configuration → CRM → Questions*
- *questionnaire form* → section *Questions* → addition of new question

All questions defined in the system can be freely grouped into selected *Questionnaires.*
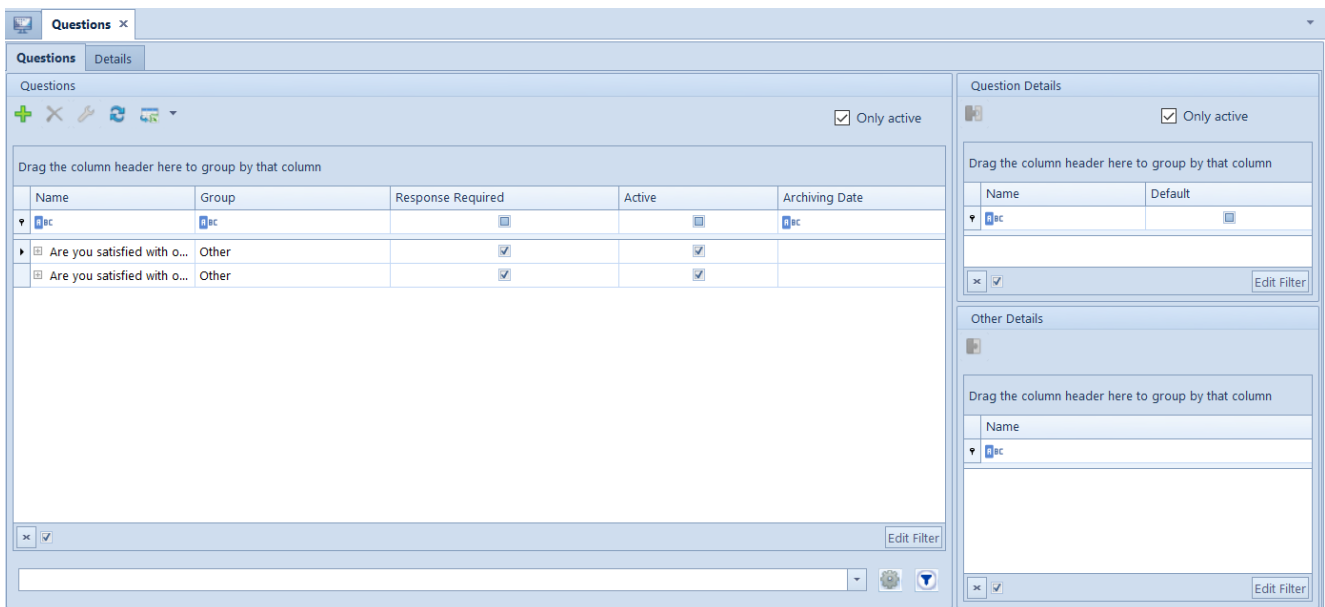
List of questions

After adding a new question, it is necessary to complete the following fields:

- **Name** — question
- **Group** — mandatory field, retrieves values from generic directory *Question Group (Configuration → Generic Directories → CRM → Question Group).* Enables grouping of defined questions into relevant categories.

- **Text** – if the parameter is checked, the question is an open-ended question
- **Values** – checking of the parameter allows for using an attribute value as response. As a response value can be selected only an attribute which:
    - on its form, has parameter *Response to question* checked.
    - Has one of the following formats: *text/number/logic value/list/date*

After selecting an attribute of *list* type, in *Values* section of the question form, it is also possible to define value of points for each answer. After a questionnaire is confirmed, an evaluation expressed in numeric values, calculates as product of points defined on question details and question group weight, is presented on it.

- **Required** – parameter checked by default, requires providing of responses on a questionnaire question
- **Default Value** – defining a default value for a response. This parameter can be edited only for questions with checked parameter *Required.*

Adding new question

After saving a question form, with the use of *Question Details,* available on the list of questions, it is possible to precise their content. This section presents values defined in generic directory *CRM Question Details (Configuration → Generic Directories → CRM)* which can be associated with a given question and one of them can be set as default.

[Alert]

Questions assigned to a questionnaire can be modified only through an operator who adds a questionnaire to an object and has permission *Modification of questionnaire to fill* granted. The permissions are available from the level of *Configuration → Company Structure → Operator Groups → Other permissions.* [/alert]

After defining a list of questions, it is possible to assign them to a <<questionnaire template>> and attach it to selected object. Questionnaires activities are available from the level

of the list of:

- **customers/vendors**
- **contact persons**
- **employees**

To open the list, it is necessary to select button [**List**] available on one of the above-mentioned lists.
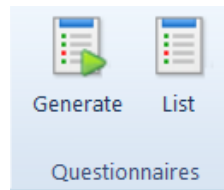
Buttons available in Questionnair es section

Questionnaire templates

The system provides the user the possibility of creating his/her own questionnaires based on previously defined questions and answers. A list of questionnaire templates is available from the level of *Configuration → CRM → Questionnaire Templates.*

The *Questionnaire Templates* list presents templates defined in the system.

The questionnaire form is composed of dedicated tabs *General* and *Objects,* as well of standard tabs: *Attachments* and *Change History.*
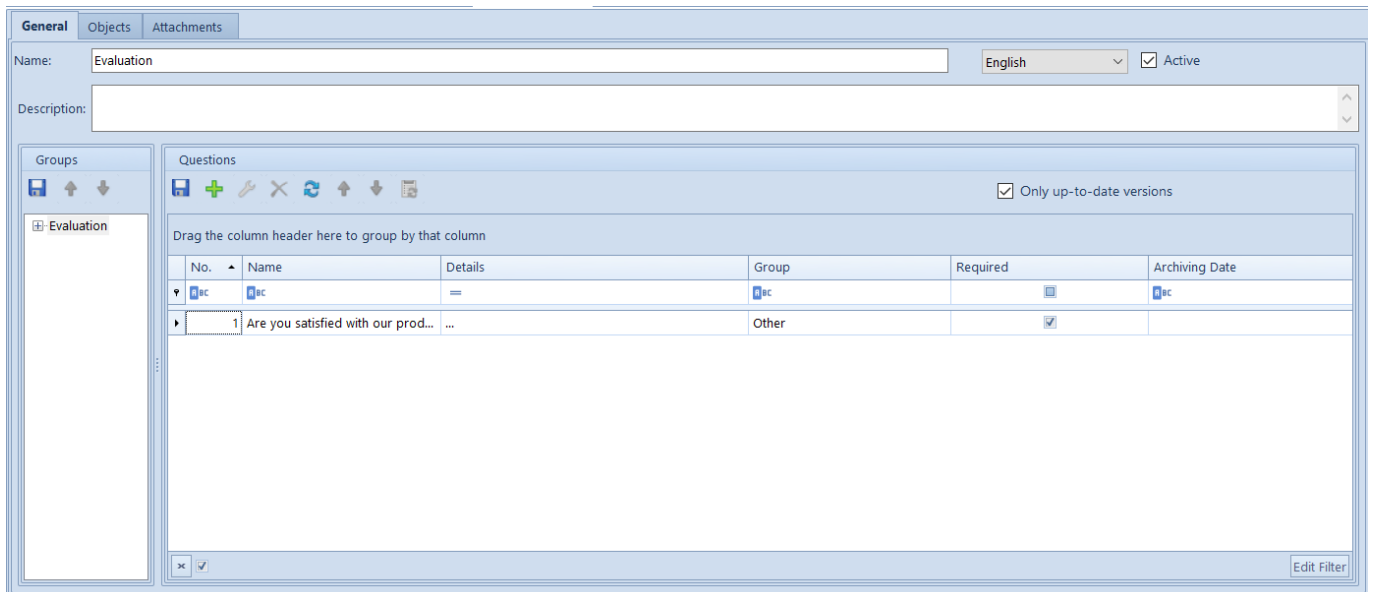
The process of defining of question of which a questionnaire is composed is described in article *Defining questionnaire.* Before saving a template, it is necessary to complete *Name* field.

To be able to use a defined questionnaire template, it is necessary to assign it to an object for which it is supposed to be available. From the level of the tab *Objects,* it is necessary to assign a template for:

- **Customer/Vendor**
- **Employee**
- **Contact**
- **Meeting**
- **Contact person**

Objects assigned to a questionnaire will be also available on the tab *Objects* of the questionnaire form.

Batch generation of questionnaires

Batch addition of questionnaires allows for assigning a given questionnaire to serveral objects simultaneously. The functionality is available under [**Generate**] button, placed on the ribbon above the following lists:

- *Customers/Vendors*
- *Employees*
- *Contact Persons*
- *CRM Activities*

To add a questionnaire in a batch, it is necessary to:

- In *Questionnaire* field, select one of questionnaires assigned to a given object
- Add it to customers/vendors/employees/contact persons/activities selected from a list

In section *Respondendt,* select an employee who will answer the questions. To make a generated questionnaire available also from the level of the calendar, it is necessary to check parameter *Add to te calendars of employees.*

Window for batch addition of questionnaires

Add supervisors from customer/vendor form – this parameter can only be checked if a questionnaire is added from the level of customer/vendor list. After checking the parameter, the list *Respondent* gets deactivated and only supervisors of a given customer/vendor will be available as respondents.

Clicking on [**Generate**] button assings the questionnaire to selected objects. Assigned questionnaires can be displayed with the help of [**List**] button, available on the list of customers/vendors/employees/contact persons/CRM activities.