

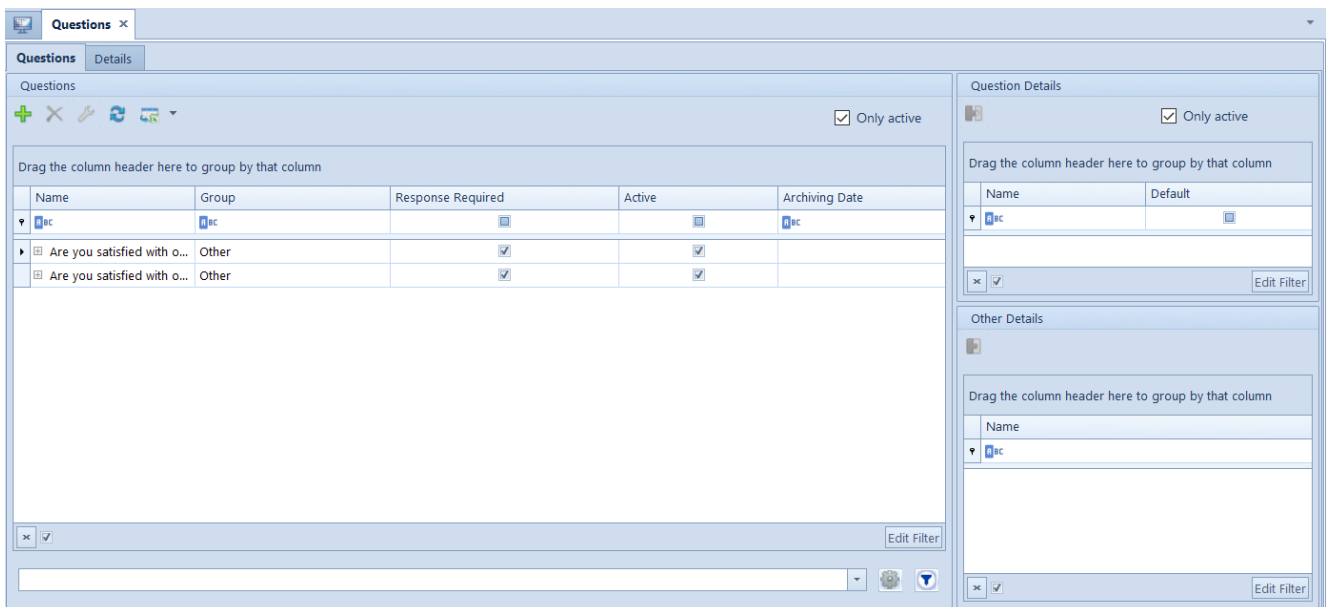
Defining questionnaire

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*.

General Change History

Name: English

Group: Active

Description:

Responses

Text Values of Attribute:

Required Default Value:

Values

Drag the column header here to group by that column

Value	Points
Yes	0,00
No	0,00

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]

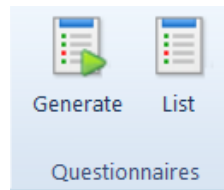
Questions assigned to a questionnaire can be modified only through an operator who adds a questionnaire to an object and has permission *Modification of questionnaire to fill* granted. The permissions are available from the level of *Configuration → Company Structure → Operator Groups → Other permissions*.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



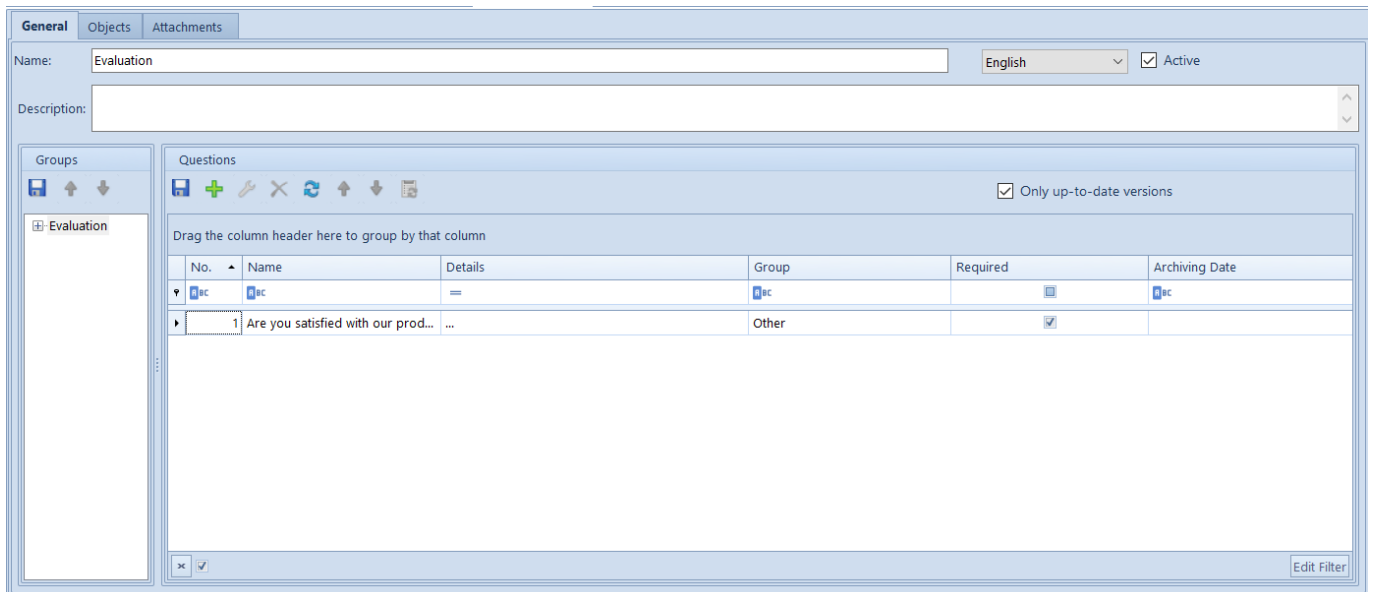
Buttons
available in
Questionnaires
section

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 several 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 *Respondent*, 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 the calendars of employees*.

Questionnaire:

Description:

Add To Object

Drag the column header here to group by that column

Code	Name
ec	ec
COMARCH	Comarch S.A.

Add Filter

Respondent

Drag the column header here to group by that column

Code	First Name	Last Name
ec	ec	ec

Add Filter

Add supervisors from customer/vendor form

Questionnaire Period

Start Date:

End Date:

Expected Date

Start Date:

End Date:

Add to the 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 assigns 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.