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*.

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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*.

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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* \rightarrow *Generic Directories* \rightarrow *CRM)* which can be associated with a given question and one of them can be set as default.

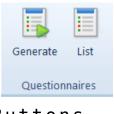
[Alert]

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* \rightarrow *Company Structure* \rightarrow *Operator Groups* \rightarrow *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* \rightarrow *CRM* \rightarrow *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*.

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The process of defining of question of which a questionnaire is composed is described in article <u>Defining questionnaire</u>. 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*.

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	Add supervisors from customer/vendor form						
Questionnaire Period		Expected Date					
Start Date: 08.08.2021		Start Date: 08.09.2021					
End Date: 08.10.2021		End Date: 08.10.2021					
		Add to the calendars of emp	oloyees				

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.