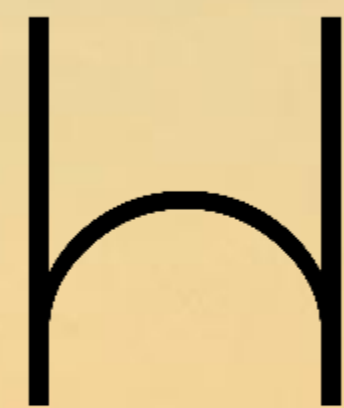


Codegarden 2018

# Umbraco Forms as the Ultimate Survey Tool



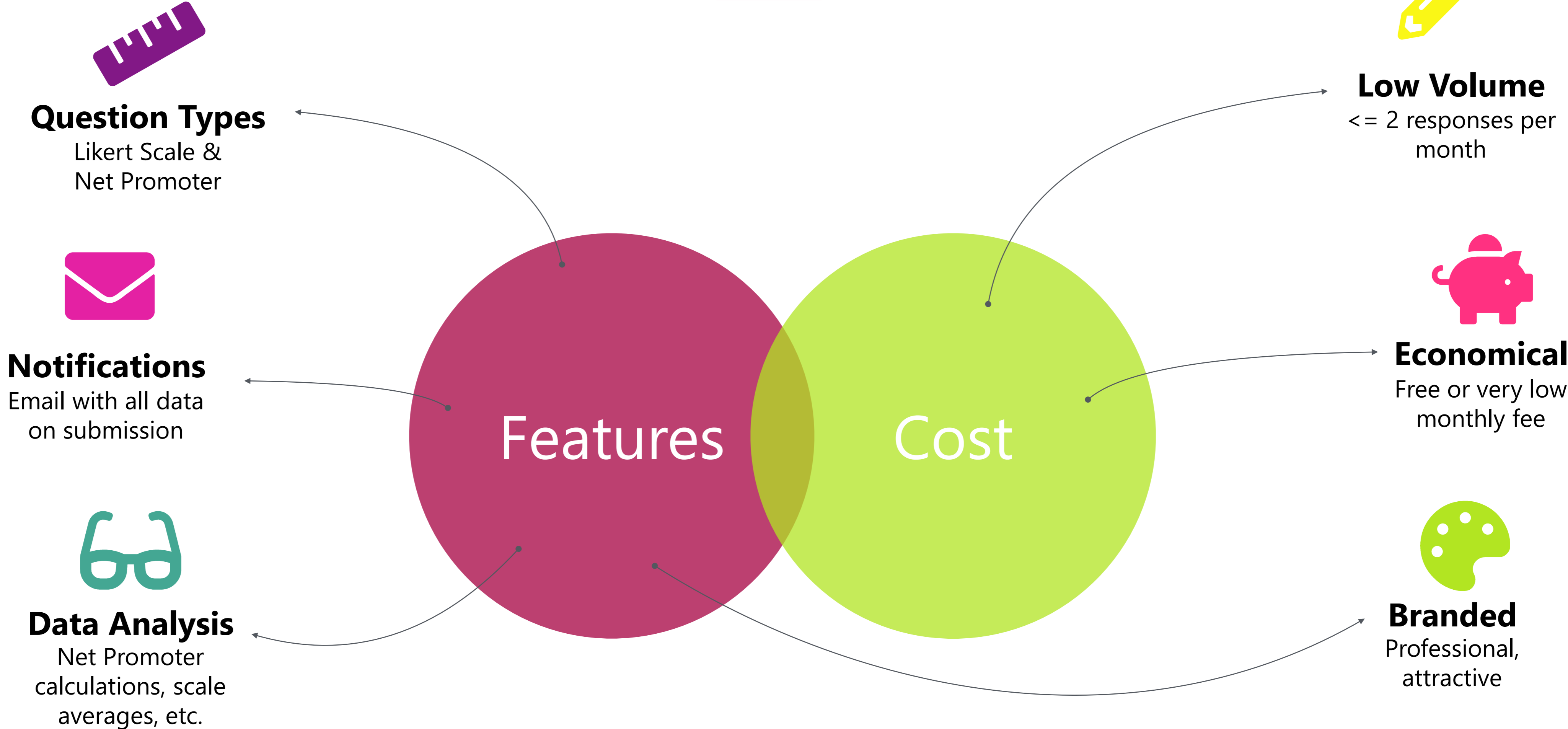
Heather Floyd



Once upon a time...

# Requirements

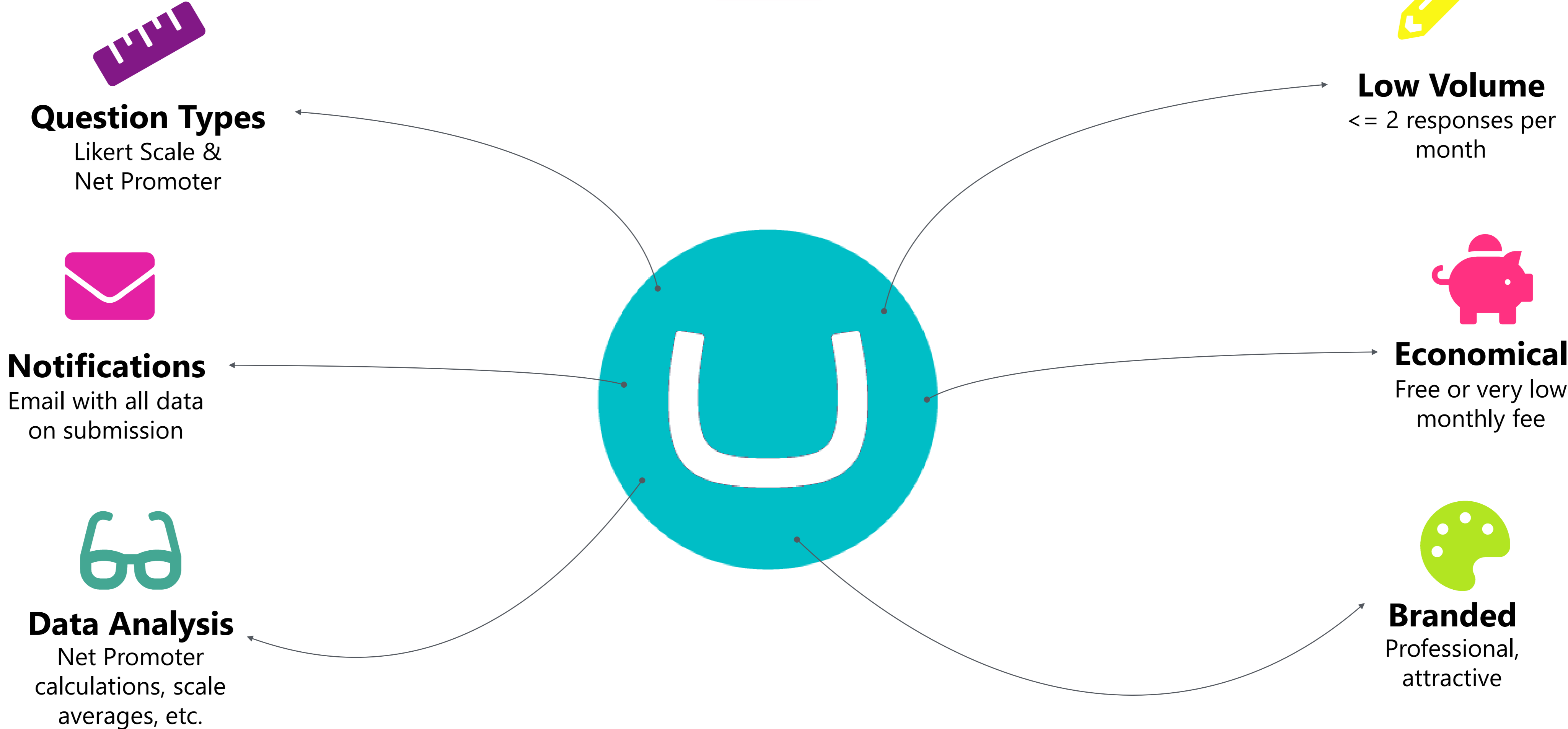
"Client Satisfaction Survey"



# Solution: Umbraco Forms!

# Requirements

## "Client Satisfaction Survey"



# DEMO TIME

GO TO: <https://HeatherFloyd.com/cg18>

# How Umbraco Forms Can Replace an External Survey Tool

## Creating Surveys

CG Demo

1 Untitled page (optional)

Untitled group (optional)

HowManyTimesBeenToCodegarden  
How many times have you been to Codegarden?  
Help text

FavoriteEveningBeverage  
What is your favorite evening beverage?  
Help text

Beer  
Wine  
Coffee

Add question

Edit question

What is your favorite evening beverage?

FavoriteEveningBeverage

Enter help text...

Single choice  
Renders a radio button list to enable a single choice answer

Prevalues

Items

+ Beer  
+ Wine  
+ Coffee

Tea Add

# How Umbraco Forms Can Replace an External Survey Tool

## Administering Surveys / Collecting Data

### CODEGARDEN 2018 DEMO SURVEY

How many times have you been to Codegarden? \*

What is your favorite evening beverage? \*

- Beer
- Wine
- Coffee
- Tea
- Water
- Other

How much do you like Beer? \*

1 2 3 4 5

Would you recommend attending Codegarden to a friend? \*

0 1 2 3 4 5 6 7 8 9 10  
Not at All Likely Very Likely

Filter entries... April 15, 2018 - May 14, 2018 [Export](#)

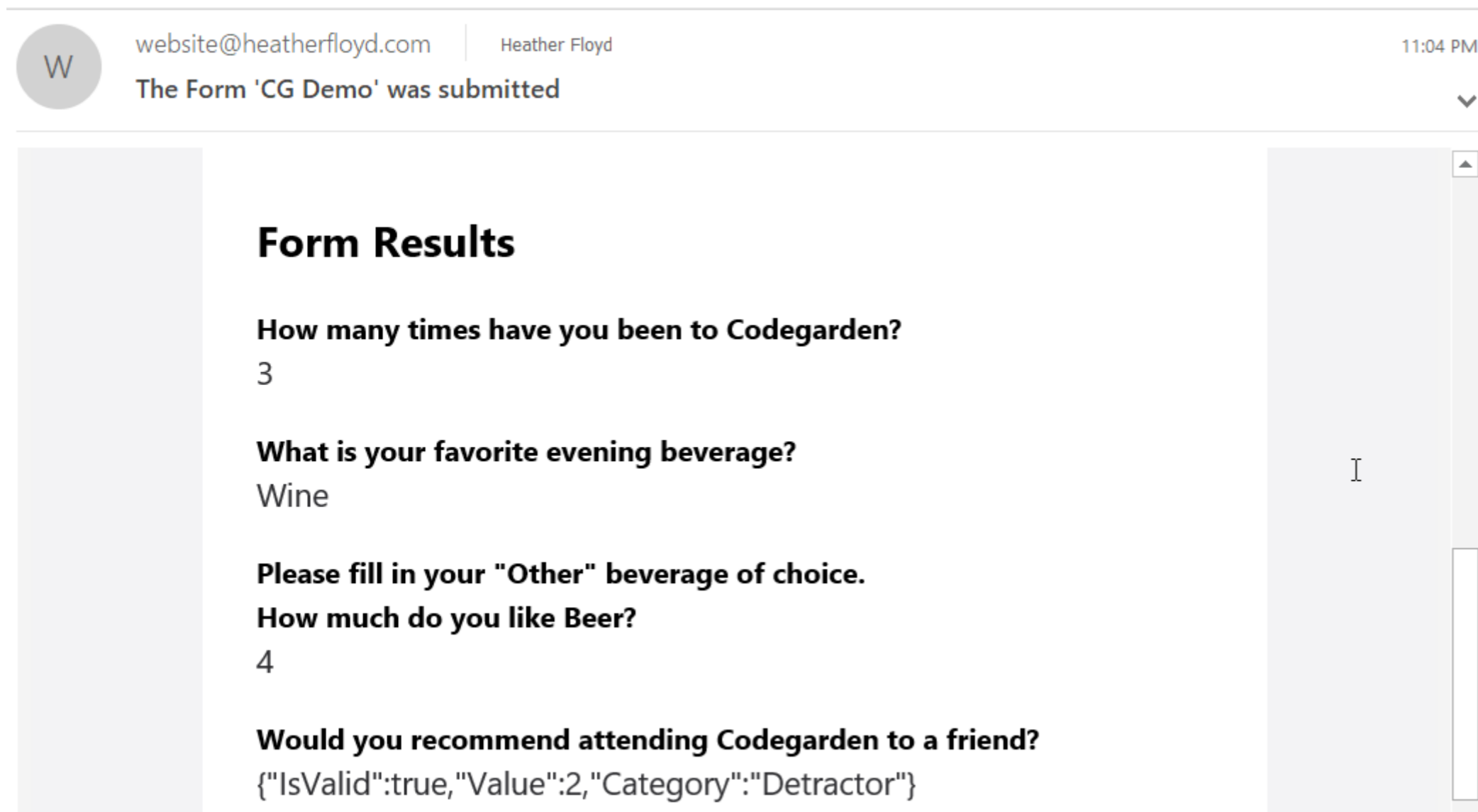
	How many times have you been to Codegarden?	What is your favorite evening beverage?	Please fill in your "Other" beverage of choice.	Member	State	Created	Updated
<input type="checkbox"/>	7	Tea			Approved	14 May 2018	14 May 2018
<input type="checkbox"/>	1	Beer			Approved	14 May 2018	14 May 2018
<input type="checkbox"/>	5	Beer			Approved	14 May 2018	14 May 2018
<input type="checkbox"/>	3	Beer			Approved	14 May 2018	14 May 2018
<input type="checkbox"/>	6	Tea			Approved	14 May 2018	14 May 2018
<input type="checkbox"/>	4	Water			Approved	14 May 2018	14 May 2018
<input type="checkbox"/>	10	Other	Negroni		Approved	14 May 2018	14 May 2018



# How Umbraco Forms Can Replace an External Survey Tool

## Acting on Survey Results (Workflows)

- Email notifications



The screenshot shows an email notification from Heather Floyd (website@heatherfloyd.com) at 11:04 PM. The subject is "The Form 'CG Demo' was submitted". The email body contains the following form results:

**Form Results**

**How many times have you been to Codegarden?**  
3

**What is your favorite evening beverage?**  
Wine

**Please fill in your "Other" beverage of choice.**  
**How much do you like Beer?**  
4

**Would you recommend attending Codegarden to a friend?**  
{ "IsValid": true, "Value": 2, "Category": "Detractor" }

- Save data inside Umbraco back-office
- Save as a text file
- Send to external database
- Send to external CRM/Marketing Automation/Customer support system
- Send to Slack
- Etc...

# How Umbraco Forms Can Replace an External Survey Tool

## Viewing Results

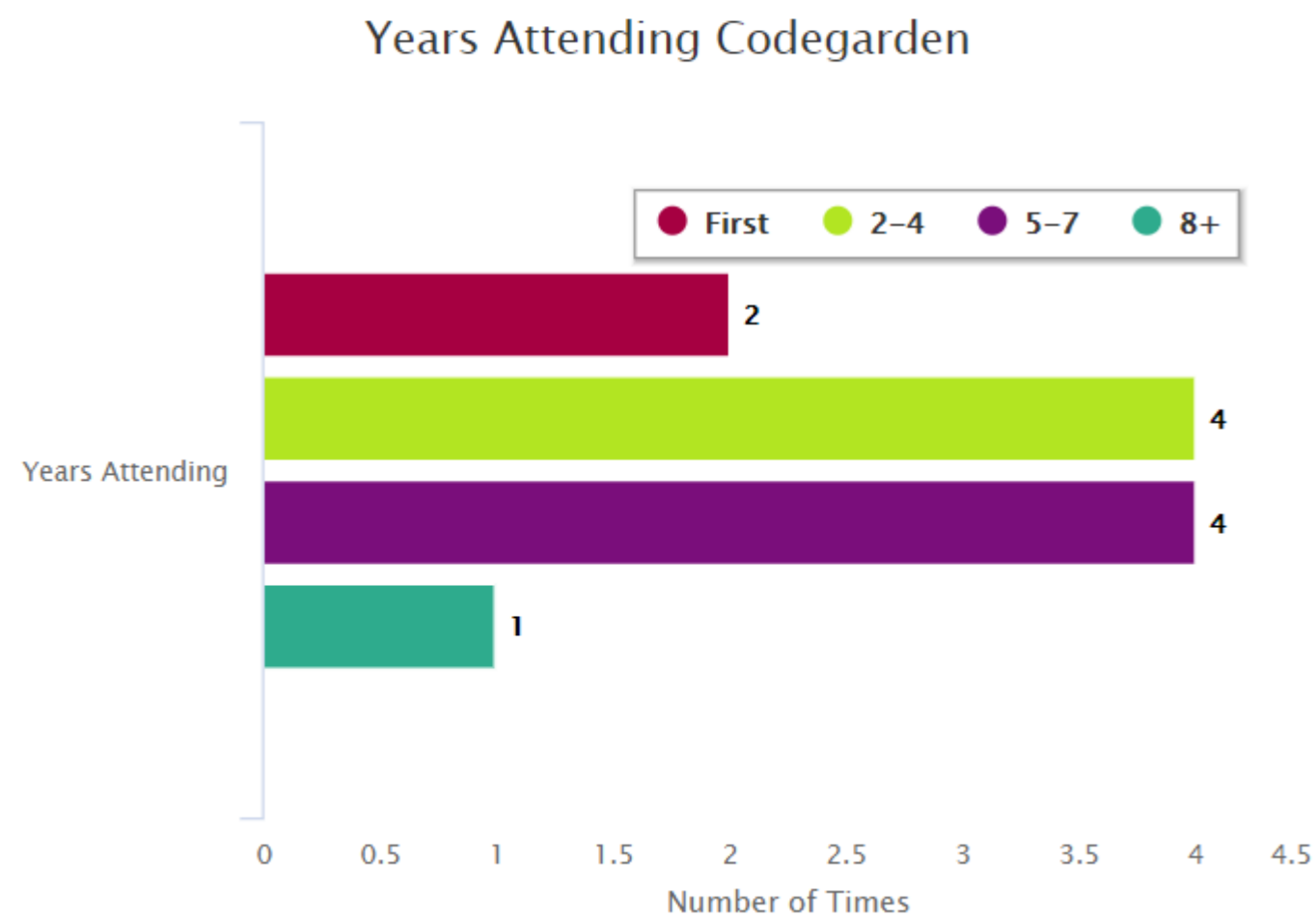
### ATTENDANCE STATS

Number of responses: 11

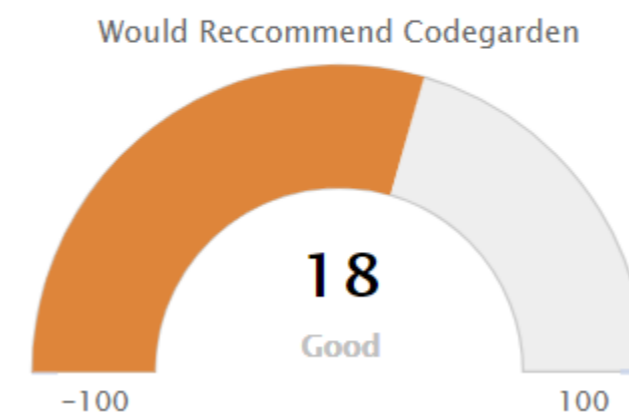
Average years attending: 4.45454545454545

Least years attending: 1 (2 people)

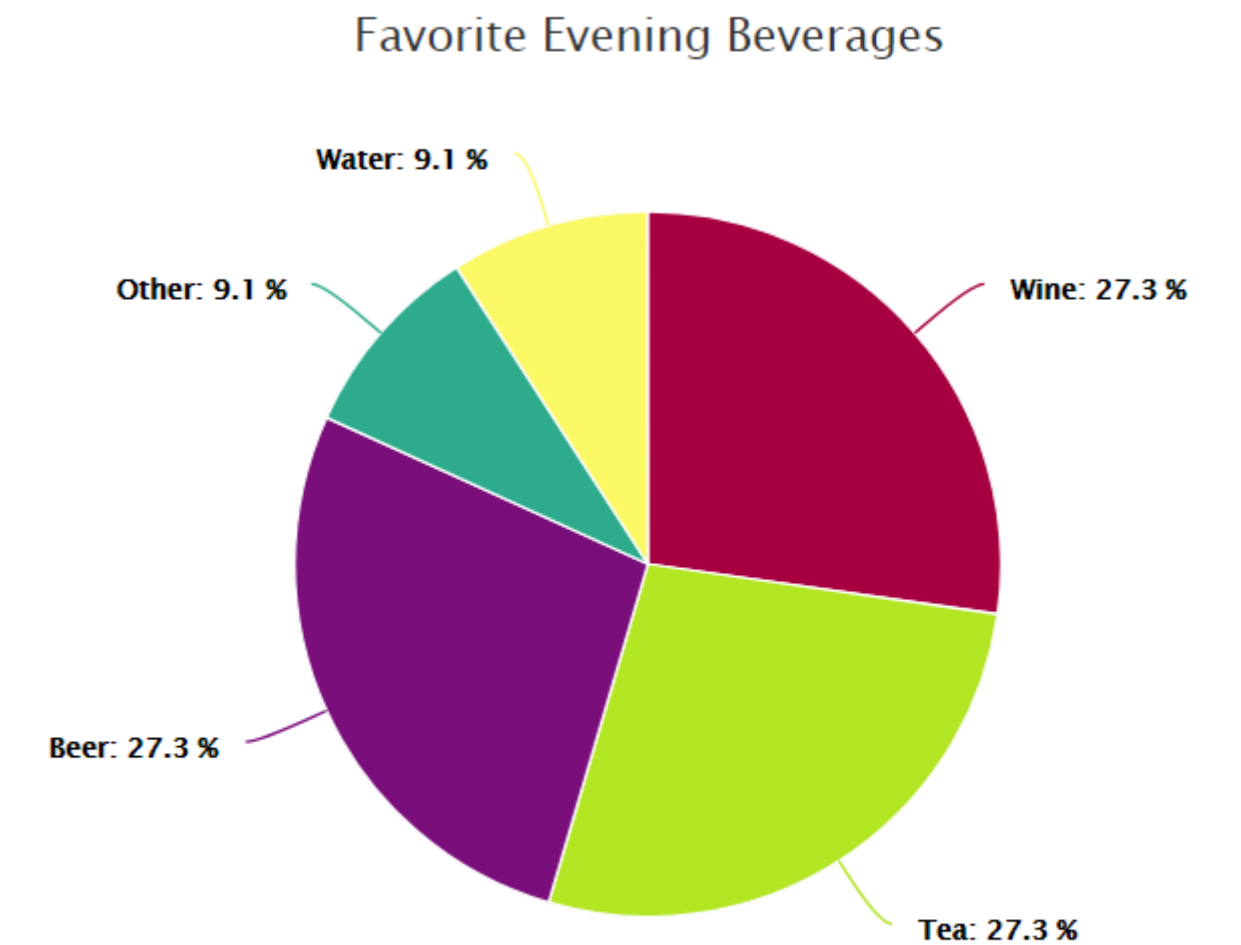
Most years attending: 10 (1 person)



### NET PROMOTER SCORE®



### FAVORITE EVENING BEVERAGES



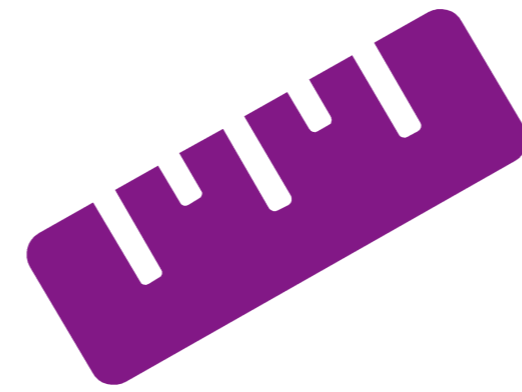
### OTHER FAVORITES

- Negroni (1)

# Requirements

## "Client Satisfaction Survey"





# Question Types

Likert Scale &  
Net Promoter

Not standard Umbraco Forms FieldTypes

Requires custom programming



## Question Types

Likert Scale &  
Net Promoter

# Creating a Custom Field Type

- FieldType class file

Inherits from "Umbraco.Forms.Core.FieldType"

- Back-office representation html/angular file

Saved as "/App\_Plugins/UmbracoForms/Backoffice/Common/FieldTypes/MyFieldType.html"

- Front-end form field representation partial view

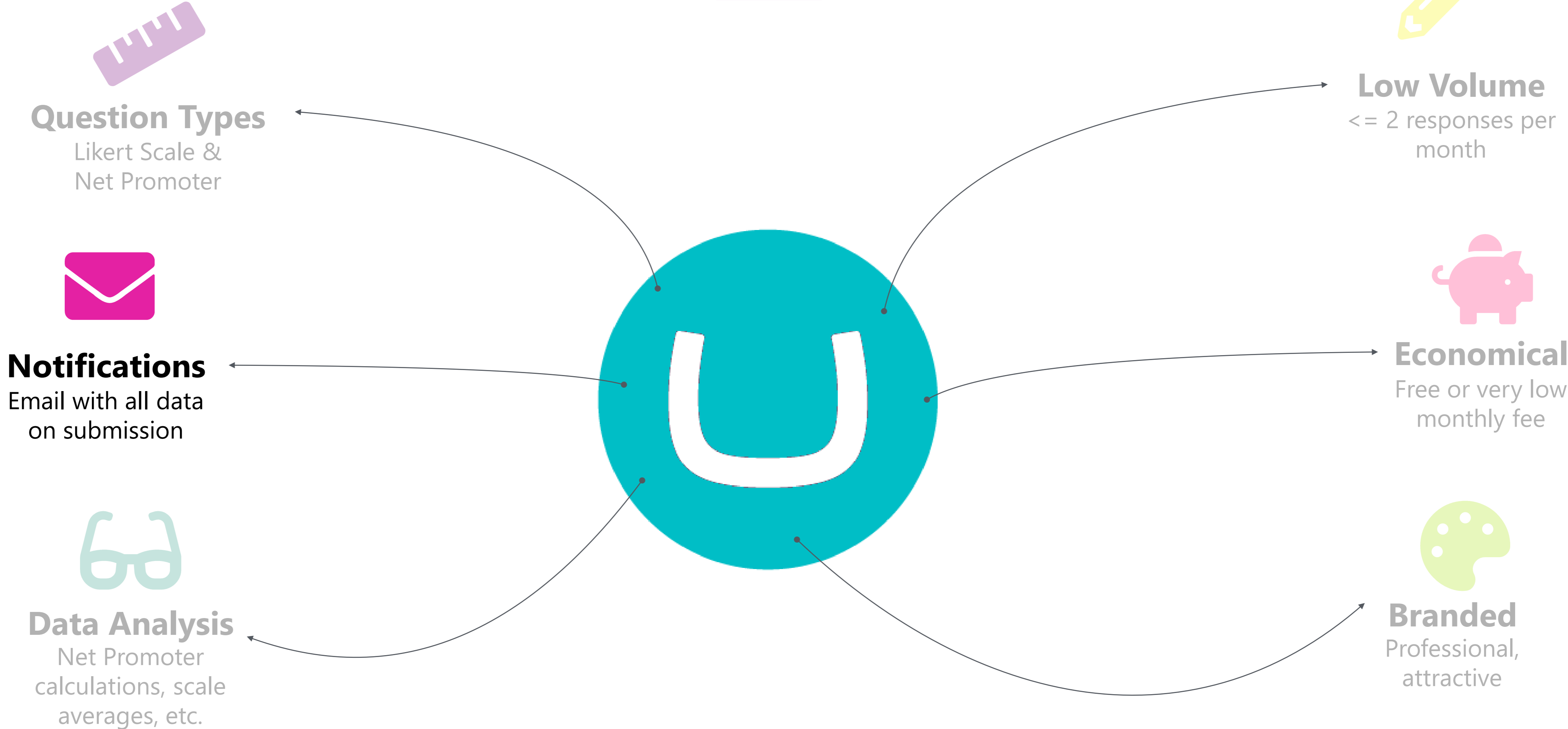
@model Umbraco.Forms.Mvc.Models.FieldViewModel

Saved as "/Views/Partials/Forms/Themes/default/FieldTypes/FieldType.MyFieldType.cshtml"

- Optional : Custom Models & Helpers to work with field data

# Requirements

## "Client Satisfaction Survey"





# Notifications/Workflow

Email on submission... and other things

3<sup>rd</sup> Party API integrations, etc.

Limited only by your imagination... and capabilities



## Notifications/Workflow

Email on submission... and  
other things

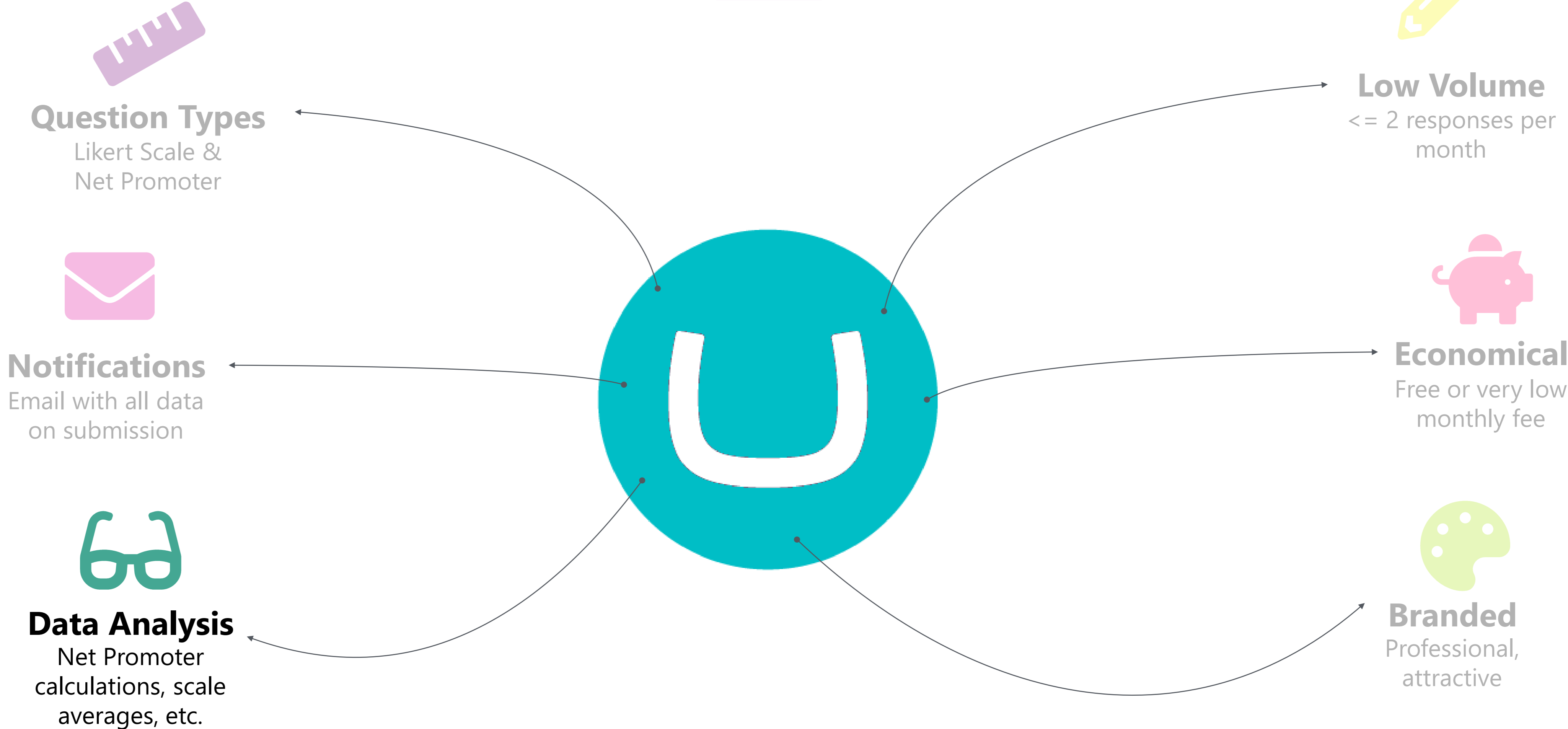
# Creating Custom Workflows

- Workflow class file  
Inherits from "Umbraco.Forms.Core.WorkflowType"
- Properties & Attributes (to define the back-office UI options)
- Override methods to implement logic:  
public override WorkflowExecutionStatus Execute(Record record, RecordEventArgs e)  
public override List<Exception> ValidateSettings()
- Use in combination with submitted form data to implement rich business interactions



# Requirements

## "Client Satisfaction Survey"





# Data Analysis & Display

Net Promoter calculations, scale averages, charts, etc.

Export data for external analysis

Use .Net and/or JavaScript for on-site processing



## Data Analysis & Display

Net Promoter calculations, scale averages, charts, etc.

# Summaries and Charts

- Display data as HTML
- Summarize and run calculations
- Use JavaScript charting libraries (Highcharts JS) for display
- Public website display
- Login-protected (Membership only) display
- Umbraco Back-office Dashboard

# DEMO TIME

GO TO: <https://HeatherFloyd.com/cg18/results>

# When Would You NOT Want to Use Umbraco Forms?

Don't have an Umbraco instance to use

Survey creators don't have Umbraco back-office access

No time for custom forms development

Don't have an Umbraco developer available

A third-party survey tool meets your needs and fits your budget

# Use-case Ideas

## Customer/Member Surveys

- Routed to external support ticket system for one-to-one follow-up
- Subscribed to email autoresponders in Marketing Automation system
- Redirected to FAQs or other webpages based on responses
- Survey responses linked to Umbraco Members

# Use-case Ideas

## Website Content Feedback

- Survey responses linked to Umbraco content nodes
- Suggest additional resources based on rating
- Automatically create a support ticket for low ratings to provide one-on-one support
- Create a dashboard for website admins to view lowest-rated content for editorial improvement

# Conclusion

Consider Umbraco Forms  
for your next Survey



# Thank You!



HeatherFloyd.com

 HFloyd



Heather Floyd