

Survey

Questionnaires for professional customer contact





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1 Introduction

With Survey, you carry out surveys using standardized questionnaires and use the results to gain and collect further information on, for example, customers, suppliers, or employees: How do customers evaluate a finished project? How satisfied are users with your product? How do customers evaluate the performance of support, sales, and marketing employees concerning training or customer complaints?

Using Survey, you can also qualify addresses in CAS genesisWorld. For example, if a prospective customer calls, information received during the call is automatically transferred to the address.

Another example is the need for consultation of prospective customers: when do they plan to install the solution? How much is the budget? Predetermined criteria provide a means of assigning products to potential new customers, and help you to identify new potential. In a questionnaire, you can both display content from CAS genesisWorld data record fields and write changed content to the database fields.

When you use Survey, 2 new data record types are added to CAS genesisWorld.

- A survey includes all essential options to structure and carry out a survey: the respondents are defined via an address collection and you can use a special questionnaire template. New data records are only created and displayed in the survey in CAS genesisWorld if the corresponding questionnaire has been filled in. The standard functions of data records are also available.
- The questionnaire data record type is either based on a general questionnaire template or a specific survey questionnaire template.

Surveys are created from data records of a particular data record type, for example, addresses, projects or opportunities. The administrator defines in the Management Console for which data record types you can create surveys. Questionnaires refer to selected data records of a data record type and are always created via a link.

Furthermore, each questionnaire is based on a questionnaire template which defines the structure, the questions, possible answers, and data analysis if required. General questionnaire templates are created for the respective data record type. Additionally to the general questionnaire templates, you can also use special questionnaire templates for an address survey.

Therefore, questionnaires are created based on the selected data record type as well as the questionnaire template for specific addresses, projects, opportunities, and so on.

Questionnaires that are accessible online can be used if you use the integrated and free functions of Survey online. You can also use anonymous and not anonymous questionnaires as well as various types of analysis.

1.1 Important information

The administrator must enter a license in the **Licenses** area in the Management Console. Afterward, you can activate two licenses for users which offer different possibilities for creating surveys.

- With the **Survey Manager** license, you can create and edit surveys and questionnaire templates.
- With the **Survey Client** license, you can edit surveys and create and fill in questionnaires.

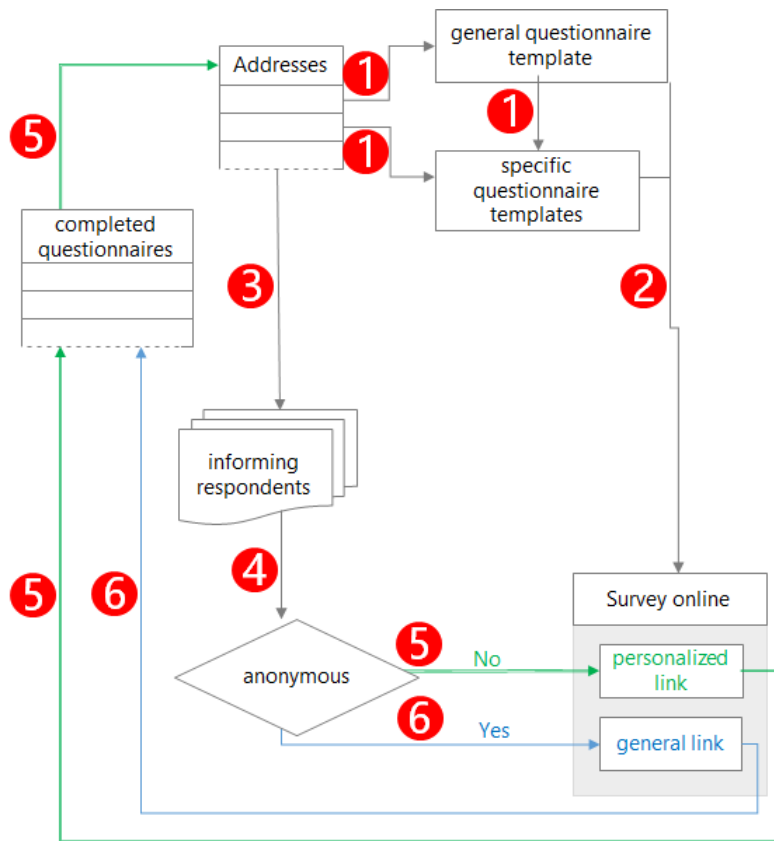
When using Survey, other modules and integrations may be affected. You can look up possible effects at hilfe.cas.de at **Working with several modules** on the [Survey](#) page.

In the Management Console, the administrator defines several specifications in different areas. Especially for survey, those include questionnaire data record types, Survey online setup and design templates.

If you want to conduct surveys in several languages, you require an extra survey template for each language, as the individually worded questions and texts cannot be automatically translated by CAS genesisWorld. You define the language of the default buttons and dialogs in Survey online in the questionnaire template. All languages that have been installed are available. You can then create questionnaires in different languages using corresponding addresses.

1.2 Surveys, questionnaire templates, and questionnaires

The following diagram displays an overview of a survey.



The process of carrying out a survey is described starting from the survey data record. In the survey data record, survey data such as addresses, questionnaire templates, answered questionnaires, and so on are displayed and managed. You can also carry out a survey without the survey data record. In this case, the steps described here are to be carried out individually and the respective data must be managed via corresponding individual views.

The differences between carrying out a survey with or without the survey data record are described for each step. Questionnaires that are available online can be used with Survey online.

1.2.1 Questionnaire templates apply to data record types

1 When executing a survey, you always start with the data records of a specific data record type, for example, addresses, projects, or opportunities. The administrator defines in the Management Console which data record types can be used for a survey.

For each survey, a questionnaire template is required. A questionnaire template contains all questions as well as information on and evaluations of those questions. Furthermore, the questionnaire template defines the structure and layout of the questionnaire.

Questionnaire templates always are applied to one specific data record type: if surveys can be created for opportunities and addresses, then you also require questionnaire

templates for opportunities and addresses. With a questionnaire template, you can create a questionnaire for each data record for which you want to execute a survey.

If you carry out a survey using the survey data record, you can only question addresses. There are 3 options for questionnaire templates in a survey.

- A general questionnaire template is available for addresses or specific types of addresses, such as companies, contact persons or individual contacts. You adapt such a questionnaire template for the survey.
- For the survey, you adopt an existing general questionnaire template and edit questions, texts, layout, and so on. By doing so, you create a specific questionnaire template for a survey that is independent from the general questionnaire template.
- You create a specific questionnaire template for a survey that is only used in this specific survey.

You create general questionnaire templates for addresses or other data record types on the **Questionnaires** tab of the **Settings** window. You create specific questionnaire templates for a survey and thus the address data record type on the **Template** tab of a survey data record. The processes of creating a general or a specific questionnaire template are principally the same.

1.2.2 Publishing questionnaires

2 Questionnaires are created based on a questionnaire template, usually published, and then filled in by participants.

CAS genesisWorld users can directly fill in questionnaires. However, questionnaires are usually published so that the respondents can access the questionnaire via their browser. Publishing is made via Survey online.

1.2.3 Informing respondents

3 If you use a survey data record, you inform respondents on the **Addresses** tab via the **Write to participants** function. An e-mail campaign data record opens automatically.

4 You insert a link to the survey in the e-mail campaign.

After creating and sending an e-mail campaign using the survey data record, the sent e-mails are automatically archived, participants are entered, and links to the survey data record and the addresses of the survey are entered.

If you publish questionnaires without a survey data record, for example, via list views or questionnaire data records, you can also inform the respondents via e-mail.

Anonymous or not anonymous surveys

In a survey data record, you define whether the survey is executed anonymously on the **General** tab.

5 Respondents receive a personal link if the survey is not anonymous. The link contains the questionnaire ID and an ID for the respondent's address.

In the survey, completed questionnaires are displayed on the **Questionnaires** tab and a link to the respective respondent address is automatically entered after the questionnaire has been completed.

6 Respondents receive a general link containing only the questionnaire ID if the survey is anonymous. Completed questionnaires are also displayed on the **Questionnaires** tab, but the respondent's address is not automatically linked with the survey data record.

An anonymous survey cannot be made without a survey data record as questionnaires are created for addresses, projects, and so on. The filled-in questionnaires and respondents cannot remain anonymous and will be public due to these data record types.

2 Starting point: questionnaire templates

The starting point of a survey is a questionnaire template which defines the structure, questions, possible answers, and data analysis if required. Based on this questionnaire template, individual questionnaires are created and used for the survey. The questionnaires are therefore used to record the answers, see "Surveys, questionnaire templates, and questionnaires" on page 6.

For questionnaire templates, the required rights must be assigned by the administrator, see "Important information" on page 6.

You can define questionnaire templates in 2 ways:

- You define general questionnaire templates on the **Questionnaires** tab of the **Settings** window. On this tab, you also manage the questionnaire templates.
- For surveys, you use a general questionnaire template or create a specific questionnaire template.

The process of creating and editing general or specific questionnaire templates is principally the same.

Data record types and address types for questionnaire templates

The administrator defines in the Management Console for which data record types you can create questionnaire templates. For the company, contact person, and individual contact address types, the administrator can define special specifications.

Editing used questionnaire templates

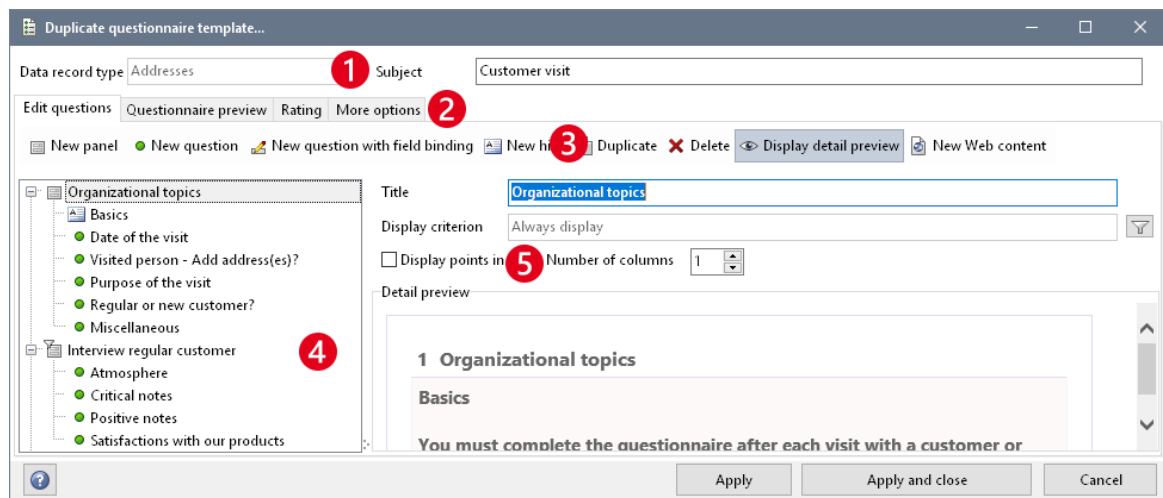
If a questionnaire template that is already in use is edited, the editing can result in unwanted consequences for creating and editing the respective questionnaires.

The administrator can lock questionnaire templates if the template has already been used to create questionnaires.

If you change or delete questions with single selections or checkboxes in a questionnaire template that is already in use, the entered answers are still displayed in the completed questionnaires. The answer ratings, however, are not stored. Questions that use a scaled answer will be deleted and their answers will also no longer be displayed.

2.1 Overview: editing questionnaire templates

Several areas with functions are available for creating and editing questionnaire templates.



1 Data record type and subject

In the **Data record type** field, you can see to which data record types a questionnaire template applies. This value cannot be changed.

- ✓ When creating a general questionnaire template in the **Settings** window, you select the data record type to which the template applies.

In a survey data record, questionnaire templates always apply to addresses.

- ✓ If you adopt a general questionnaire template when creating the survey, the data record type of the adopted template is displayed.
- ✓ If you create a survey without using a general template, the **Survey** data record type is displayed.

- ✓ You enter the **Subject** of the questionnaire into the upper pane of the window. The maximum number of permitted characters is 60.

The subject of the questionnaire template is adopted for each questionnaire that is created with the template.

2 Tab

You configure the questionnaire template on 4 tabs.

- ✓ On the **Edit questions** tab, you define the contents that are supposed to be surveyed in questionnaires using this template.
- ✓ You can find a complete overview in the questionnaire preview.
- ✓ On the **Rating** tab, you define whether and how questions are rated using points.
- ✓ On the **More options** tab, you define various settings, for example, the availability for certain users or the language of buttons and dialogs.

3 Buttons

- ✓ You use the buttons to access all functions for sections, questions, and other contents of the questionnaire template.

4 Navigator

- ✓ The navigator displays the sections and questions. You can change the order of the sections and questions by dragging them to the desired position.

5 Display

- ✓ Click a section or question in the navigator to display the possible settings on the right.

2.2 Tabs referring to the entire template

2.2.1 Questionnaire preview tab

This tab displays a preview of the whole questionnaire.

- ✓ You can answer the displayed questions. Thereby, you can, for example, check branches or options.

Edit questionnaire template...

Data record type: Subject:

Edit questions | **Questionnaire preview** | Rating | More options

Customer visit (0 of 34 points)

1 Organizational topics

Basics

You must complete the questionnaire after each visit with a customer or prospect.

All employees who go on customer visits have been given the necessary rights.

After completing a questionnaire, all employees and supervisors who go on customer visits are informed.

1.1 Date of the visit

1.2 Visited person - Add address(es)?

1.3 Purpose of the visit

1.4 Regular or new customer?

1.5 Miscellaneous

2.2.2 Rating tab

You can assign points to each answer, except text input fields.

The screenshot shows a window titled "Edit questionnaire template...". At the top, there are two input fields: "Data record type" with the value "Addresses" and "Subject" with the value "Customer satisfaction survey". Below these are four tabs: "Edit questions", "Questionnaire preview", "Rating" (which is selected), and "More options". The "Rating" tab contains the following options:

- Use rating
 - Total number of points
 - Percentage
- Display total points
- Display points next to answers
- Save
- Field: [Dropdown menu]

At the bottom of the dialog, there are three buttons: "Apply", "Apply and close", and "Cancel".

You define whether and how points are displayed and saved on the **Rating** tab.

- ✓ Select the **Use rating** option if you want to assign points to the answers.
- ✓ Select whether the reached points should be displayed as **Total number of points** or **Percentage** value.

During the completion of a questionnaire, the points are summed after each question.

- ✓ Using the **Display total points** option, you can set whether the current total number of points is displayed in the questionnaire header.
- ✓ If you activate the **Display points next to answers** option, the points for each option are displayed next to the questions during completion by respondents.

Deactivate the checkbox if, for example, you wish to prevent any subconscious manipulation due to desirable outcomes, for example, more points being seen as a positive outcome.

- ✓ The ratings for individual questions are saved in the questionnaire. Enable **Save** to save the points scored in a linked data record field.
- ✓ Select the field you want to use from the drop-down list. You will see all the fields apart from those fields that use input assistance options and currency fields.

If you select the **Probability** field in an opportunities questionnaire, the points reached are always saved as percent values in the opportunity, even if the field contains an absolute value.

To save the probability, you have to deactivate the **Use calculated probability** option in the opportunity.

If you use a rating, then the total points scored for answers to a questionnaire are displayed on the **Questionnaire** tab of the respective data record. Each time the user submits an answer, the total is recalculated and the value in the field is updated.

If you have divided the questions into panels, then points for a panel are added up and can be displayed.

2.2.3 More options tab

On this tab, you define the general settings for questionnaires that have been created using the questionnaire template.

 Entered **Participants** can use the questionnaire template to create questionnaires.

- ✓ The **Width (pixel)** is used if the questionnaire is displayed in a data record. Any wider text will be wrapped.

New questionnaires will be created with a default size of 800 pixels.

- ✓ Activate the **Number sections and questions** option to display continuous numbering.
- ✓ If you want to repeat a survey using the same questionnaire template, you activate the **Allow multiple questionnaires for one data record** option.

Often, a questionnaire is used only once. If the option is deactivated, you can only create one questionnaire from the questionnaire template for each initial data record.

You may, however, want to use a questionnaire template for regular surveys in regular intervals, for example, visiting reports. In this case, you activate the option so that you can always use the same questionnaire template.

- ✓ Select the **Category**, **Type**, and **Status** to automatically create questionnaires based on this template for specific data records.

As soon as you have activated a type, the corresponding status entries for this type are displayed as well. You can also define one or more status for an activated type.

Under the following conditions, questionnaires are automatically created:

The data record contains the defined category or the corresponding type or status value. The data record must contain at least one corresponding entry for the activated **Category**, **Type**, or **Status** fields on the **Options** tab. The system compares the values that are currently found in the corresponding fields, not the values that have been saved in the data record. This means that if you are editing the data record, the newest entered values are taken into consideration even without saving.

If an address contains matching entries in the fields and the **Questionnaire** tab of the address is opened, then a questionnaire with the template is created. As precondition, no other questionnaire with this template must exist.

A user opens the **Questionnaires** tab in a data record.

No questionnaire has been created for this data record.

Those conditions apply to all data record types for which you can create questionnaires and which contain the **Category**, **Type**, and **Status** fields.

For the **Category**, **Type**, and **Status** fields, you can only define the single selection list or checkbox list as input help. Other types of input help are not supported. Please contact your administrator for more information.

Online questionnaire settings

- ✓ **Select Survey online language for buttons and dialogs** for the display of buttons such as **Next** or **Cancel**.
- ✓ Select a **Design template**. The administrator defines design templates and a **Default design** in the Management Console, see "Survey online" on page 58.
For new templates or templates without design, the default design is used.
- ✓ Using the **Sections per page** function, you can define whether the questionnaire should be displayed completely on one page or not.

If you select the **One section per page** option, the **Back** and **Next** buttons are displayed below each section to be able to navigate through the questions. A progress bar is also displayed.

- ✓ With the **Save IP addresses of the respondents** option, the **IP address** in the data record of a questionnaire is filled in.

Using this function, questionnaires that have been filled in online indicate whether the same person has completed the questionnaire more than once.

3 Editing questions and other contents


On the **Edit questions** tab in questionnaire templates, the panels, questions, and other contents are displayed on the left in a navigator.

When deleting questions, recorded data can be deleted as well. Therefore, the administrator can prohibit the editing of questionnaire templates.

On the right, the possible settings for panels, questions, and other contents are displayed.


- ✓ Using the toolbar functions, you add new panels, questions, and other contents and access further functions for the individual elements.

General toolbar functions

-  With the **Duplicate** function, you create a copy of element you have selected in the navigator and inserts the new element at the end of the panel.

When duplicating panels, all questions of the panel are duplicated as well.

- ✗ Clicking **Delete** deletes an element you have selected in the navigator. Please note that further data in questionnaire templates could be lost when deleting elements.

-  By clicking **Detail preview**, you open an element preview on the right area of the window.

3.1 Filtering the display of sections and questions

You define **Display criteria** for either sections or questions. Thereby, individual sections or questions are only displayed if certain answers to so-called filter questions have been given or if specific field values are found in the initial data records.

For example, you create a questionnaire template about customer satisfaction and use the **Type** and **Status** fields in the initial data record: the first section is only supposed to be displayed to certain customers. The questionnaire template contains questions on the use of all products. The first question asks the customer which product they are currently

using. Depending on the answer to this first question, only the questions that concern the use of the selected product are displayed.

The **Value** setting in the filter conditions refers to possible answers to questions. If you rename or deleted answers in the questionnaire, you must also adjust the filter conditions.

- Click the **Display criteria** button for the corresponding section or question. A window opens.

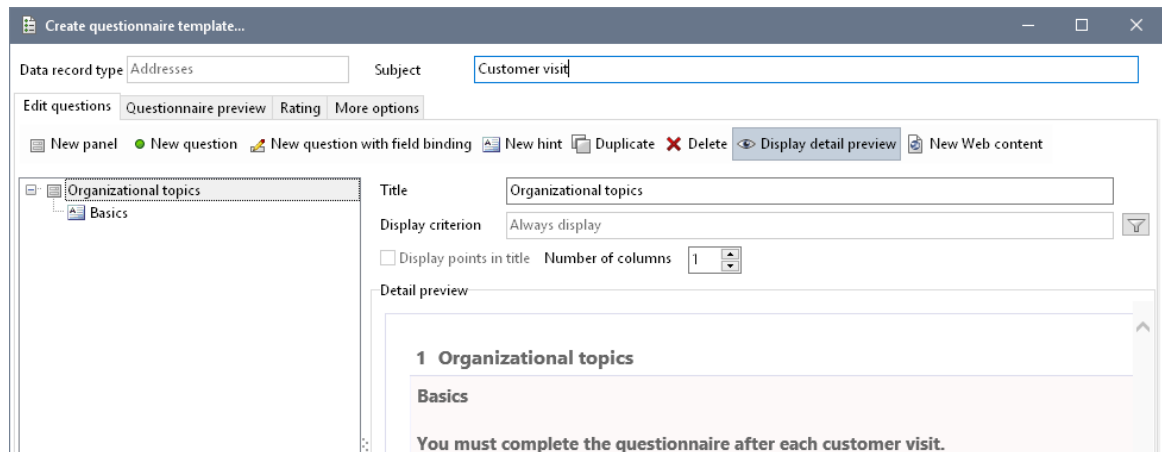
- ✓ If you use the Premium Edition, the **Answer to question** drop-down list will also contain the associated data record's **Type** and **Status**, as well as the predefined questions.
For example, you can set the filter criteria so that the **Product** panel is hidden for all addresses when **Address: Type is not equal to Customer**.
- ✓ If you select the **One criterion must apply** option, then only one of the filter criteria must be fulfilled. Multiple conditions are linked with **Or**.
- ✓ If you select the **All criteria must apply** option, then all criteria must be fulfilled. In this case, all the criteria are linked by **And**.
- ✓ If a filter does not apply to a section or question, then you can **Hide** or **Deactivate** this filter.

When designing questionnaires with several columns in sections, the **Hide** function will not be supported as this would move the other questions of the section.

3.2 Panels

You use panels to sort your questions into topic groups. At least one panel must always be available.

- A newly created panel is displayed with the **New panel** title and selected in the left navigator. In the right area of the tab, the panel settings are displayed.



- ✓ Panels can be unwanted or unnecessary, for example, for so-called icebreaker questions at the beginning, if a questionnaire does not need structuring, or for text at the end of the questionnaire.

In this case, do not enter text in the **Header** field. The panel is not displayed in the questionnaire.

- ▽ In the **Display criteria** field, defined filter conditions are displayed, see "Filtering the display of sections and questions" on page 16.
- ✓ If panels contain rated questions, you activate the **Display points in the title** option to display the number of points scored and the total number of achievable points, see "Rating tab" on page 12.
- ✓ Take the screen size into account when defining the **Number of columns** for a panel. For many columns, a horizontal scroll bar may be displayed, which can make it more difficult for users to complete the questionnaire.

3.3 Questions

- Click **New question** on the **Edit question** tab.

- ✓ First, select the question **Type** from the drop-down list. Depending on the question type, you can define partly similar and partly different settings.

3.3.1 Similar settings for several question types

- ✓ You can formulate your question in the **Question** field.
You cannot manually indent text by using spaces or tabs.
- ✓ A **Mandatory entry** is displayed as a mandatory field and highlighted by a red asterisk in the questionnaire. A mandatory field requires an entry before the questionnaire data record can be saved.

Without a survey data record, a questionnaire must be saved before publishing with Survey online. You can only save the questionnaire if you have entered a value in the mandatory fields. Therefore, mandatory fields can only be defined for questions with field binding in questionnaires without survey that are supposed to be published. Only

in such cases, the mandatory field can be pre-filled with a field value taken from the initial data record.

Using survey data records, the questionnaire data record is only created once the respondent uses the Survey online link and must therefore not be saved beforehand. In this case, mandatory fields are possible for surveys with or without field binding.

If the question **Type** is **Link (display)**, the **Mandatory entry** option is only available for questions with field binding.

- ✔ In the **Display criteria** field, defined filter conditions are displayed, see "Filtering the display of sections and questions" on page 16.
- ✔ You can add an **Info text** to each question to help the person fill out the questionnaire, see "Info text" on page 31.

Display and columns

- ✔ At **Display**, you can define a **User-defined width (pixel)** or display the question across the **Entire width** of the questionnaire.
For some questions, you can define a **Minimum width (pixel)** for the possible answers.
- ✔ At **Columns**, the options are only relevant if you use more than one column in a panel, see "Panels" on page 17.
- ✔ Using the **Span across all columns** option, you display the question and the input field across all columns in a new row.
- ✔ Using the **Start new row** option, you display the question and the input field across a column in a new row.

3.3.2 Text input field

Single- or multiple-row text fields are great for open questions, comments, or notes.

Text fields only accept unformatted text.

The screenshot shows a software window titled 'Customer visit'. At the top, there are navigation buttons: 'New hint', 'Duplicate', 'Delete', 'Display detail preview', and 'New Web content'. The 'Question' field contains the text 'Free text'. Below this, there are several configuration options: 'Mandatory entry' (unchecked), 'Type' (set to 'Text input field (several rows)'), 'Display criterion' (set to 'Always display'), and 'Info text' (checked, set to 'Evaluation scale'). A 'Display' tab is active, showing 'Columns' settings: 'Height (rows)' (set to 2), 'Customize field' (checked), 'Maximum height (rows)' (set to 8), and 'Display button for time stamp' (unchecked). At the bottom, a 'Detail preview' section shows a preview of the question as it will appear to the user, including a question ID '1.1 Free text' and a text input field.

Display

- ✓ For single-row text fields, you define the display of the input field: using the **User-defined width (pixel)** or spanning the **Entire width**.
- ✓ For multiple-row text fields, you define the **Height (rows)** or a variable height with or without a maximum height limit.

The input field is always displayed across the entire width of the questionnaire.

- ✓ If you activate the **Display time stamp button** function, the user's name and the current date are inserted into the survey while it is being completed.

When the questionnaire is completed by a respondent, the user **Survey online** is entered.

3.3.3 Input fields for numbers

Questions using integer input fields are suitable for recording data such as the number of employees in a company. Floating-point numbers are used for numbers with decimal places.

The screenshot shows a software window for editing a survey question. The subject is 'Customer visit'. The question text is 'Number of employees'. The type is set to 'Number input field (integer)'. The display criterion is 'Always display'. Below these settings are tabs for 'Points', 'Number format', 'Display', and 'Columns'. The 'Points' tab is active, showing a table with columns 'From', 'To', and 'Points'. The first row has 'From' as 5 and 'Points' as 0. There are 'New' and 'Delete' buttons above the table. A 'Detail preview' section at the bottom shows a snippet of the question as it would appear in the survey, titled '1.1 Number of employees'.

The same settings are available for both types of input fields on the **Points**, **Number format**, and **Display** tabs.

Points

The first row on the **Points** tab is the zero area, which is automatically inserted. When completing a questionnaire, it is possible that one field remains empty; this also applies to number fields. In this case, you are supposed to be able to give points or minus points. The zero area is displayed to enable this function.

- ✓ By clicking **New**, you create a new input field for which you enter values in the **From** column and in the **Points** column if necessary.

The value in the **To** column is automatically calculated from the value in the **From** column in the previous row. The upper limit of a phase consists of the lower limit of the following phase.

The table is automatically sorted by the lowest values.

- ✓ For floating-point numbers, the value in the **To** column is defined by the number of places after the decimal point.

Number format

- ✓ You can define a permitted range by setting a minimum and a maximum value.

- ✓ You can also select the option to automatically display the thousands separator.
- ✓ For floating-point numbers, you will also need to specify the number of decimal places.

3.3.4 Yes/No/Not specified

To these questions, respondents can answer either **Yes**, **No**, or **Not specified**.

Points

- ✓ For the **Not specified** answer, no points are awarded.

3.3.5 Single selection/multiple selection (checkboxes)

In case of **single selections**, respondents have to select one of several options when completing the questionnaire.

In case of **Checkbox lists**, respondents can select any number of options.

If you edit or delete single selection or multiple selection questions in questionnaire templates that are already in use, entered answers are still displayed in questionnaires. However, the ratings of answers are not retained.

Customer visit

New hint Duplicate Delete Display detail preview New Web content

Question First contact occurred via

Mandatory entry

Type Multiple selection (checkboxes)

Display criterion Always display

Info text

Answers Options Columns

New Delete Up Down

Answer	Points
Company website	0
Radio ads	0
Print ads	0

Detail preview

1.1 First contact occurred via

Company website

Radio ads

Print ads

Settings are available for both types of questions on the **Answers**, **Options**, and **Columns** tabs.

Answers

- ✓ After clicking **New**, you enter an option in the **Answers** column and assign points for this option.

Options

- ✓ The recommended option for **Single selection** questions is **Radio buttons**. In the questionnaire, all possible answers are displayed, but only one answer can be selected.
- ✓ A **Single selection drop-down list** must be expanded before an answer can be selected.
- ✓ A **Checkbox list** consists of a number of checkboxes.
Commas must not be used in answers and will be removed automatically.

- ✓ **Checkbox lists** with many answers require less space if you increase the **Number of columns**.

The value entered on the **Options** tab defines how many columns are supposed to be used for the question's answers.


The value entered on the **Columns** tab defines whether only one or all columns of the panel are used for the question.

- ✓ With the **Miscellaneous** field, you can provide respondents with an input field if none of the options in the questionnaire applies.

No points can be assigned to this input field, because the question is not considered answered.

3.3.6 Date

Questions that ask for a date have an input field.

 The button is automatically displayed next to the input field and opens the small window in which you select the date.

You cannot specify the width of a date field.

3.3.7 Scale

The answers to questions with a single-row scale are gradually rated. Thereby, you enable, for example, simple evaluations.

- A state has improved, worsened, or remained the same.
- Satisfaction is recorded on a scale of 1-5, in the style of German school grades.

The questions with multiple-row scales consist of multiple aspects. Each aspect answer is gradually rated as with the single-row scale. Therefore, multiple-row scales consist of multiple graded single-row scales. With this function, you can, for example, split questions evaluating customer satisfaction into 3 aspects.

- Satisfaction concerning availability by phone,
- satisfaction concerning opening hours, and
- satisfaction with specialized information.

In single-row scales, respondents select one answer. In multiple-row scales, respondents select one answer per aspect. Therefore, the answers are displayed as radio buttons.

If you edit or delete scale questions in a questionnaire template that is already in use, the entered answers in questionnaires are still displayed. However, the answer ratings are not retained.

The screenshot shows a web-based survey editor. At the top, there's a search bar with 'Customer visit' entered. Below it, a toolbar contains buttons for 'binding', 'New hint', 'Duplicate', 'Delete', 'Display detail preview', and 'New Web content'. The main configuration area includes:

- Question:** A text box containing 'Customer satisfaction with our products'.
- Mandatory entry:** An unchecked checkbox.
- Type:** A dropdown menu set to 'Scale (multiple rows)'.
- Display criterion:** A text box with 'Always display' and a filter icon.
- Info text:** A checked checkbox and a text box with 'Evaluation scale' and an edit icon.
- Aspects:** A tabbed interface with 'Answers', 'Scheme', 'Columns', and 'Display' tabs. Under 'Answers', there are 'New', 'Delete', 'Up', and 'Down' buttons. Below these are two rows: 'Question' and 'Flooring', each with a dropdown arrow.
- Detail preview:** A scrollable area showing a preview of the question. It has a title '1.1 Customer satisfaction with our products' and a table with two columns (1 and 2) and two rows (Flooring and Doors). Each cell contains a radio button.

Aspects

- ✓ For the **Scale (multiple rows)** type, you define the content aspects you want to rate with the scale.

Answers

- ✓ For single-row scales, the points for all entered answers are summed.
- ✓ For multiple-row scales, the points for all entered aspects and questions are summed.

Options

- ✓ The single-row scale can be displayed horizontally or vertically.

If the answers in the horizontal view are longer than the width of the questionnaire, then a scroll bar will appear. Answers in the vertical view that are too long are automatically wrapped.

Multiple-row scales are always displayed horizontally.

Scheme

- ✓ If you want to always use the same rating and scheme, you activate the **Use scheme of the following question** option. The answers and points of an existing questions are automatically adopted on the **Answers** tab and cannot be edited.
- ✓ Answers and points are automatically changes if you edit the scheme of the adopted question.
- ✓ The scheme for a single-row scale can used for a multiple-row scale, and vice versa.

Display

- ✓ For single-row scales, the frame is expanded at the left side according to the **Minimum width (pixel)** value.
- ✓ For multiple-row scales, the value in the **Minimum width (pixel)** field applies to the **Aspects** column.

A minimum width of 0 pixels means that the column width will be set to that of the longest word in the **Aspects** column. The same also applies if you enter a minimum width which is less than the longest aspect.

3.3.8 Link (display)

You can display questionnaire data record fields in the questionnaire. Furthermore, you can display fields of linked data records in the questionnaire. Displayed values cannot be changed.

The **Mandatory entry** option cannot be selected as only the display of fields is defined in the questionnaire.


With **Link (Display)**, you can also display fields of a company data record in questionnaires for contact persons. To do so, select the **Company** link type.

Link

- ✓ First, select the **Link type**. In the drop-down list, all possible links of the data record type for which you want to create the questionnaire template are displayed.
Possible links are 1:1 and 1:n links, because the questionnaire can only display one value and this value must be unique.
- ✓ To display the fields of the questionnaire data record, select the **Questionnaire data record of the questionnaire** link type.
- ✎ The **Display fields** button opens the **Select fields** window. Define which of the linked data record or questionnaire data record fields you want to display.

The special **Address (Form of address, title, first name, last name)** field is only available for addresses. You use this field to display the respondent's identity in the questionnaire.

3.4 Questions with field binding

 Using questions with field binding, you can update fields in the initial data records of questionnaires.

In questions with field binding in questionnaires, the field value that has been entered in the initial data record, or linked data record, is displayed. If the field value is changed during the completion of the questionnaire, the changed is automatically adopted in the initial data record and the data record is saved.

For example, you create a **Question with field binding** for the **Preferred contact method** field. The **Single selection** type is automatically set and the radio buttons are automatically displayed, as only one option can be activated. If the preferred contact method remains the same, the question must not be answered.

Please note

Questions with field binding cannot be used in anonymous surveys. There are no links available between a questionnaire and a further data record and it is therefore unclear in which data record the value must be entered.

Please be careful with any of the fields that are used for functions or calculations in the Desktop Client. With such fields, there can be unwanted side effects. As a result, please test such fields carefully.

Some fields with function can already not be selected, for example, start, end, duration, reminder, and so on. Additionally, you cannot use questions with field binding for notes fields.

Special considerations are necessary for fields with input assistance options.

You cannot change synchronous field values.

Possible question types

The **Field** which is to be filled with the answer to a question defines the question **Type** and the possible **Answers**.

For example, the **Verified on** field of an address contains a date. The corresponding question **Type** is automatically set to **Date**. For text fields, more than one question **Type** is available.

Data	Type of questions	Examples
------	-------------------	----------

True/False	Yes/No	is company for addresses Out of office for appointments
Integer	Number input field	Number of employees for addresses
Floating-point number	Floating-point number input field	Budget for jobs
Date	Date	Verified on for addresses
Text with variable length	Text input field (single row)	Reason for projects
	Text input field (multiple rows)	Subject for appointments
	Single selection	
	Multiple selection (checkboxes)	

Possible settings for the **Type** correspond with the settings for questions without a field binding, see "Questions" on page 18.

Key features of the Link (display) type

If the question **Type** is **Link (display)** and the questionnaire is opened for a data record, the field of the linked data record is displayed in the questionnaire. Displaying links is only available for text fields.

The initial data record must be linked with the questionnaire using a 1:n or a 1:1 link. For the allocation of the questionnaire to the initial data record to be unique, only one link can be taken into account. Primary links are special 1:n links that are available in the Premium Edition.

By using a question with field binding, a text field value from the initial data record can be replaced by a text value from a data record that is linked with the initial data record.

For example, customer support requires that you create a new project for each customer. Each project has a primary link to the customer's company. The questionnaire template is valid for projects. The subject of the project should be replaced by the customer's name.

- ✓ A questionnaire is created for project A. The project has a primary link to address B. The subject of project A should be the company name from address B.
- ✓ You select the **Subject** field for the question.
- ✓ Select the **Link (display)** question **Type** and **Primary link (address)** as the **Link type**. Select **Company** at **Display fields**.

The information in the questionnaire for project A come from the linked address B. This is why the project value in the questionnaire can only be displayed and not changed.

The field binding is used to overwrite the selected project field with the address field.

The company name taken from address B overwrites the project subject when the questionnaire is saved.

3.4.1 Synchronous field values are included

Specific fields in a company data record and the corresponding contact person data records are kept synchronous, for example, the company name or the bank details. Those fields can only be changed in the company data record and the changes are automatically transferred to the contact person data records. Other fields, such as name or department, are only available in contact person data records.

You could use address questionnaire templates for both companies and contact persons. Questionnaire templates can contain questions with field binding for fields from companies and contact persons. In questionnaires for the respective address type, the fields that cannot be edited are displayed as read-only or empty.

3.4.2 Input assistance options are possible answers

If input assistance options have been defined for a field, the input assistance options are automatically displayed as possible answers. You can change the number of points for these answers, but you cannot change the actual answers.

Fields with **Selection tree** input assistance options cannot be used for questions with field binding. Input assistances with input option cannot be used as well.

If possible, input assistance options are displayed in the user's language in questionnaires.

- Usually, the language with which the user is logged on to the Desktop Client or CAS genesisWorld Web is used.
- For the display via Survey online, the language that is set on the **More options** tab is used, see "More options tab" on page 14.
- If the input assistance options are not available in the set language of a user or Survey online, the input assistance options are displayed in the language of the database.

For group-specific, restricted input assistance options, only those input assistance options are available in a questionnaire to which the user has access. You cannot use group-specific input assistance options in online questionnaires.

You cannot use the **Miscellaneous** option for single or multiple selections in questions with field binding to fields with input assistance options.

Generally, you cannot use further answers or a **Miscellaneous** field for fields with input assistance options.

If you open the questionnaire for a data record and values have already been entered in the initial data record fields, those values are displayed in the questionnaire.

When completing the questionnaire, the displayed values can be edited. The values in the questionnaire are transferred to the initial data record when the questionnaire is saved. Thereby, the previous values in the initial data record are overwritten by the values entered in the questionnaire.

In addition to the answers provided by the input assistance options, you can define further answers.

Example

You want to record a classification of prospects and customers in a questionnaire for companies. Input assistance options are available in CAS genesisWorld for the classification. The classification is usually recorded to a company data record. When completing the survey on customer satisfaction, the classification value is supposed to be checked and corrected, if necessary.

- ✓ For the question with a field binding, select the **Classification** field.
- ✓ In addition, select **Checkboxes**.
- ✓ Subsequently, the values of the input assistance options are automatically displayed as answers.

When you now open a questionnaire in an address, the value that has already been entered in the **Classification** field of the address data record is automatically adopted as answer to the corresponding question in the questionnaire.


For some addresses, the classification values may be changed in the questionnaire or new values are added.

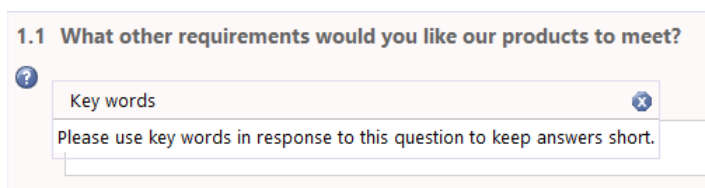
The values changed in the questionnaire are then applied to the **Classification** field in the data record as soon as the data record and the questionnaire are saved.

3.5 Info text

An info text can be used for an explanation of a question.

You can simultaneously display multiple texts for multiple questions in the questionnaire.


- ✓ Activate the **Info text** option and enter a short text in the input field.
-  Click **Edit** to open a window in which you enter a **Title** and a longer **Text**.



- ? The info text is displayed in the questionnaire when the mouse hovers above the question mark icon.
- ✓ By clicking the question mark, you open a window that remains opened even if you move your mouse.


You can move the window anywhere. You can open the window for multiple questions at the same time.
- x To close the window containing the info text, click the icon in the top right corner.

3.6 Web contents

 Websites or media contents are integrated in questionnaire templates using an iframe HTML element.

- ✓ Enter the **Title** and a **URL**.

3.7 Hint texts

 By clicking the **New hint** button in the toolbar of a questionnaire template, you insert a new hint at any location.

4 Managing general questionnaire templates

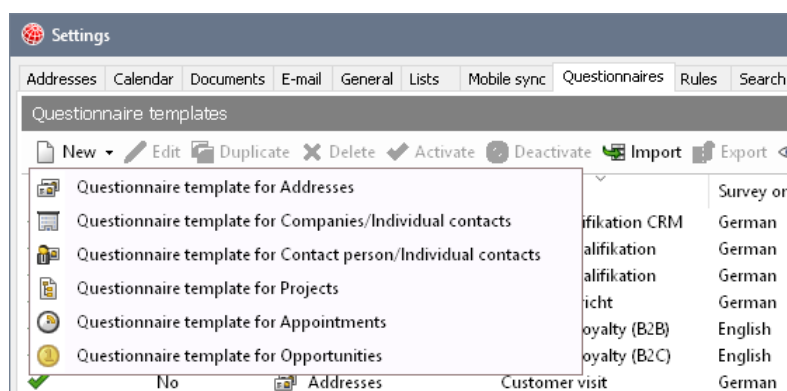
You manage and create general questionnaire templates in the **Settings** window of the Desktop Client, see "Surveys, questionnaire templates, and questionnaires" on page 6.

The **Questionnaires** tab is only displayed if you have been given the necessary rights by the administrator, see "Important information" on page 6.

Active	Existing ques...	Data record type	Subject	Survey online l...	Changed by	Changed c
✓	Yes	Companies/Individual...	Adressqualifikation CRM	German	Robert Glaser	2/2/2015 9
✓	Yes	Projects	Auftragsqualifikation	German	Robert Glaser	4/8/2019 2
✓	No	Opportunities	Auftragsqualifikation	German	Robert Glaser	5/14/2019
✓	Yes	Addresses	Besuchsbericht	German	Robert Glaser	5/27/2019
✓	No	Addresses	Customer loyalty (B2B)	English	CAS	9/18/2017
✓	No	Addresses	Customer loyalty (B2C)	English	CAS	9/18/2017
✓	No	Addresses	Customer visit	German	Robert Glaser	7/11/2019
✗	Yes	Contact person/Indiv...	Datenschutz - Optin	German	ADMINISTRAT...	2/2/2015 9
✓	Yes	Contact person/Indiv...	Datenschutz - Optin-Abf...	German	ADMINISTRAT...	2/2/2015 9
✓	No	Addresses	De emotionele binding v...	Dutch	CAS	9/18/2017
✓	No	Addresses	De emotionele binding v...	Dutch	CAS	9/18/2017
✓	Yes	Addresses	Emotionale Kundenbind...	German	Robert Glaser	5/6/2019 5
✓	Yes	Addresses	Emotionale Kundenbind...	German	CAS	7/3/2015 2
✓	No	Addresses	Fidelização de clientes (B...	Portuguese	CAS	9/18/2017
✓	No	Addresses	Fidelização de clientes (B...	Portuguese	CAS	9/18/2017

4.1 Creating general questionnaire templates

On the **Questionnaires** tab, you can create questionnaire templates for all data record types for which the administrator has allowed to create questionnaire templates, see "Questionnaire templates apply to data record types" on page 7.



- Open the **New** drop-down list and select the data record type for the questionnaire template, see "Overview: editing questionnaire templates" on page 10.

You cannot retroactively change the selected data record type.

- ✓ We recommend that you deactivate newly created questionnaire templates that have not yet been completed. Thereby, you prevent questionnaires from being created using the new questionnaire template.


The administrator can prevent questionnaire templates from being edited if questionnaires have already been created. However, in case of a new template, your colleagues might unintentionally use the template to create a questionnaire.

4.2 Editing general questionnaire templates

Editing or deleting a questionnaire template that is already in use can lead to unwanted consequences, see "Starting point: questionnaire templates" on page 9.


The administrator can lock questionnaire templates from being edited. If editing is prohibited, the **Edit** button is deactivated.


If a questionnaire template is in use, **Yes** is displayed in the **Existing questionnaires** column of the questionnaire templates list.


 Before you start editing questionnaire templates on a larger scale, we recommend that you **Deactivate** the template.

Thereby, you prevent questionnaires from being created using the questionnaire template.


Questionnaires that have already been created using the questionnaire template are not influenced by deactivation and can still be completed.

 Creating new questionnaire templates can often be easier if you **Duplicate** or edit existing questionnaire templates.


 You can only **Delete** questionnaire templates if **No** is displayed in the **Existing questionnaires** column. You cannot delete questionnaire templates that are in use, but only deactivate them.

 **Activate** a questionnaire template to use it to create questionnaires or use the template for surveys.

4.3 Importing, exporting, and displaying

 You can export and import questionnaire templates as XML files.

When importing and exporting questionnaire templates, the participants of the questionnaire templates are not taken into account, see "More options tab" on page 14. Imported templates are created as public templates.

 Click **View** to display or hide deactivated questionnaire templates. All questionnaire templates are displayed by default.

5 Surveys

Surveys are a specific data record type which you use to structure the sequence of a survey using functions and tabs.

- A survey can be anonymous or not anonymous and can contain an individual welcome and/or closing text.

- The respondents are defined using an address collection which is displayed in the survey data record.
- You can choose between a general or a specific questionnaire template. The selected template is displayed in the data record and can be edited if necessary, see "Surveys, questionnaire templates, and questionnaires" on page 6.
- With the survey data record as the starting point, you continue by sending an e-mail campaign which contains a link to the questionnaire to all respondents.

When a recipient clicks the link, the questionnaire is created as a form on the Survey online web server and can be opened and completed in the respondent's browser.

- A questionnaire data record is created in CAS genesisWorld as soon as a respondent opens the questionnaire link. Completed questionnaires are displayed in the survey data record.
- The survey participants are automatically entered as questionnaire participants.
- The links between the survey, addresses, and questionnaires are automatically entered.

The links between an address and a completed questionnaire respectively are only entered, if the survey has not been anonymous.

- You can also access the most common functions for a data record and data record type, for example, participants, the **Change log** and **Dossier** tabs, list views, and so on.

You need a license for creating and editing surveys, see "Important information" on page 6. Questionnaires for survey data records are published using Survey online. Survey online requires a specific right.

5.1 Creating surveys

 When you create a new survey, 2 prompts open successively.

- ✓ First, you select whether you want an anonymous survey.

If you want to create an anonymous survey, the **Anonymous survey** option on the **General** tab is automatically activated. You cannot change this setting. You cannot use questions with field binding in anonymous surveys as there is no link between an address and a questionnaire.

You can use questions with field binding in not anonymous surveys.

In the second prompt, you select whether you want to use a general questionnaire template.

- ✓ If you select one of the displayed templates for addresses and click **Apply**, the selected general template is adopted on the **Template** tab of the new survey.

You can edit an adopted general template in a survey.

- ✓ If you click **Continue without a template**, you must create a specific template for the survey on the **Template** tab.

5.2 Surveys - General tab

On the **General** tab of a survey, common data record fields are available, for example, **Subject**, **Participants**, and **Notes**. Additionally, you can use further general fields for surveys.

- ✓ In the **Welcome text** and **Closing text** fields, you enter texts which are displayed to the respondents at the beginning and the end of the questionnaire respectively.

Please note that the questionnaire template can contain further texts, see "Texts with explanations" on page 37.

- ✓ The activated Anonymou survey option is adopted during the creation of the survey, see "Creating surveys" on page 35. You cannot change this setting.
- ✓ The **Participation with registration** option can be activated if the survey is not anonymous and serves security purposes. Only respondents that have received the questionnaire link, a name, and a password can complete such questionnaires.

You can register for a questionnaire with any address, which has been linked to the questionnaire using either the **Address** link type or the **Processed by** link type. When using the **Processed by** link type, the address that has been entered in the **Person responsible** field of the questionnaire is linked. In that way, also those CAS genesisWorld users can register for a questionnaire for whom an address exists in CAS genesisWorld. This, for example, enables the manual filling in of a questionnaire for a customer on the phone.

Respondents can use any e-mail address that has been entered in the initial address data record as registration name.

You enter the password on the **Details** tab of an address data record. The password is displayed while you are entering characters. When you save the address, the password is encrypted and saved to the database. After saving the address, the password is displayed encrypted.

👉 You can only enter a new password if you click on **Reset** before.

The **Invited addresses** and **Answered questionnaires** fields are automatically updated.

The participants that have been entered in the survey data record are adopted as participants in each newly created questionnaire data record.

The screenshot shows the 'New Survey...' application window with the following configuration details:

- Subject:** Customer visit
- Person responsible:** Robert Glaser
- Welcome text:** We would like to know more about our customer's experiences. Please complete the following questionnaire to help us better our service.
- Closing text:** Thank you for completing the questionnaire. Your supervisor will be informed about the completion.
- Survey Settings:**
 - Anonymous survey
 - Participation with registration
 - Status:** The survey is activated
 - Invited addresses:** 4
 - Start:** Thursday, July 11, 2019
 - Answered questionnaires:** 0
 - End:** Tuesday, July 30, 2019
- Participants:** Robert Glaser (with 'private' and 'confidential' options)
- Notes:** A large empty text area with 'Edit' and 'Time stamp' icons.

Texts with explanations


You can insert texts with explanations in surveys at any location and for any purpose. The texts are always displayed in a defined font size. Line breaks or empty lines can be inserted by clicking the Enter key in the respective input fields. We recommend you plan the structure of your explanations to make sure your texts are not repetitive within a survey.

- In a survey data record, you define a **Welcome text** and a **Closing text**.
- You can insert a **Hint text** at any location in a questionnaire template, for example, at the beginning, at panels or questions, or as a thank you message at the end.
- An **Info text** explains a question and can be opened by respondents by clicking a button.

5.3 Addresses tab

On the **Addresses** tab of a survey, you manage the addresses that are participating in the survey.

If you have created a survey that is not anonymous, you use the first drop-down list to filter addresses by **Invited participants**, **Open** questionnaires, or **Responded**.

 Using the **Add addresses** drop-down list, you open the **Search** window for addresses or distribution lists.

When searching for addresses, all addresses of an address type are found.

Please note that you can only add those addresses to a not-anonymous survey that have the same address type as defined in the questionnaire template. This means that if you are using a questionnaire template for contact persons and individual contacts, you cannot add companies. If you are using a questionnaire template for companies and individual contacts, you cannot add contact persons.


A distribution list can contain addresses of several address types. If you add addresses from a distribution list to a not-anonymous survey, only those addresses that match the address type of the questionnaire template are adopted. Depending on the address type of the questionnaire template it may occur that company or contact partners are not adopted.

You can add all address types to address questionnaire templates which do not have a defined address type.

The **Add to survey** option is available in each list view for addresses in the **Tools** menu, in the context menu and also in the **Search** window.

Select one or more addresses. Clicking the button opens the **Search** window for surveys.

After clicking on a found survey, you transfer the selected addresses to the survey.

 You can **Remove addresses** at any time. In the course of the removal, all links between survey and address are deleted. The removal may require a new process if the address is supposed to be removed from a questionnaire that has already been completed.

 Using the **Excel export** function, you export the survey subject, the corresponding link, and certain address fields into a Microsoft Excel file.

The administrator defines which address fields are exported in the Management Console. For example, the Microsoft Excel file can be used for automated sending without CAS genesisWorld. For such a purpose, the file should include the salutation, first and last name, and an e-mail address.

You can only export data if you have been given the necessary rights.

Using the **Copy the survey URL** function, you transfer the link to the questionnaire to the clipboard.

You can then forward this link directly to the respondents.

Informing respondents via e-mail campaigns

The **Write to participants** button is available if the following conditions have been met.

An e-mail account for receiving and sending e-mails has been set up for the logged-on user.

The survey is active. This means that the **Start** date is in the past and the **End** date has not yet been entered or is in the future.

At least one address is displayed on the **Addresses** tab.

The survey data record has been saved.

The screenshot shows the 'New E-mail campaign...' window with the following details:

- Subject:** Feedback on customer visit March 3
- E-mail account:** Robert Glaser
- Sender:** Robert.Glaser@cas-demo.de
- Document language:** English
- Recipient:** info@ergometra.de;info@lancelot-enterprises.de;ptv@ptv.de;info@birnbaumhempel.com;info@norkauf.de;info@logitron.de
- Status:** No further recipients were contacted.
- Form of address:** thank you for the interview via **Last contacted via**. Please complete the following **Customer visit** questionnaire so that we can better our performance according to your needs. Best regards,
- Attachments:** No attachments were attached.
- Field variables list:** Birthday card, Category, Changed by, Changed on, Christmas card, Classification, Company, Company 2, Contact person, Cost center, Country, Country (delivery), Country (private), Country format, Created by, Created on, Credit institution, Creditor number, Currency, Customer ID.

By clicking **Write to participants**, you open a prompt. Select whether you want to write to all or only the selected addresses.

Then, a window containing all e-mail campaign templates opens. To be able to better identify templates for a survey, you can, for example, enter **Survey:** as subject of enter a specific value in the **Category** field.

- ✓ Select a template. An e-mail campaign data record is then created.

Write the e-mail campaign as you usually do in CAS genesisWorld. You will find further information in the online help pages for users on the [Creating and sending e-mail campaigns](#) page.

In the e-mail campaign, you can use field variables as well as mail merge fields from addresses or the survey.



You can find the **Insert link for survey** button between the text of the e-mail campaign and the mail merge fields.

Click **Insert link for survey** to open a window.

- ✓ If you enter a **Description** for the link, the text is displayed instead of the URL.
The inserted link is survey-specific and remains the same for all respondents if you have created an anonymous survey.
If the survey is not anonymous, the link is survey- and address-specific. Thereby, the questionnaires can be allocated to the corresponding addresses, see "Informing respondents" on page 8.
- ✓ If you archive the e-mails during sending, the survey participants are also entered in the archived e-mails.

5.4 Questionnaires tab

On the **Questionnaires** tab, you can see the completed questionnaires of the survey. The number of answered questionnaires is automatically displayed on the **General** tab.

You can open the questionnaires in read-only mode by clicking them.

In the case of anonymous surveys, the individual questionnaires are not linked to the respective address.

5.5 Template tab

On the **Template** tab of a survey, either the template you have selected when creating the survey or no template is displayed, see "Creating surveys" on page 35.

You carry out a survey using a general or a specific questionnaire template, see "Surveys, questionnaire templates, and questionnaires" on page 6.

If you change a general questionnaire template on the **Template** tab, the changes only affect the current survey. The general questionnaire template and other surveys using the same general questionnaire template are not influenced by any changes.

The processes of creating a specific template or editing a general template for a survey are similar, see "Editing questions and other contents" on page 16.

5.5.1 Template data record type

You cannot change the selected **Data record type**.

- In case of anonymous surveys, the **Surveys Data record type** is displayed.
- If you have created a survey that is not anonymous without selecting a general template, the **Address** data record type is displayed.
- If you have created a survey that is not anonymous and selected a general template, the address types of the template are displayed.


If you do not select a general template, you can create the specific questionnaire template for all address types in the survey. In this case, only those specifications of the administrator apply that define for which address types you can create questionnaire templates, see "Starting point: questionnaire templates" on page 9.

If you select a general template, you can adjust the template and thereby create a specific questionnaire template for the survey.

However, such an adjusted questionnaire template still applies to the same address types that have been defined in the initial general template. This relation to address types is especially important if you want to use questions with field binding that vary depending on the address type.

5.5.2 More options tab

The available survey settings and the general questionnaire template settings on the **More options** tab are relatively similar, see "More options tab" on page 14.

 The participants of the survey have access to the survey questionnaire template and the participants are automatically adopted in the created questionnaires.


5.5.3 Requirements for editing templates

If you can edit a survey data record and the **Template** tab is not displayed to you, check whether the following causes apply.

- The survey is created using a general questionnaire template. The administrator has defined that questionnaire templates are locked if they have already been used to create questionnaires, see "Editing general questionnaire templates" on page 34.
- The survey is created using a general questionnaire template and the user has not been entered as participant in the template, see "More options tab" on page 14.
- The **Survey Manager** license has not been activated for you, see "Important information" on page 6.

5.6 Analyzing surveys

The best way to analyze surveys is to use the survey reporting template. The surveys are analyzed anonymously even if the survey was not conducted anonymously.

 Click **Report** in the opened survey.

 Select the **Survey** report template and click **Create report**.

The report is opened using the Crystal Reports Viewer.

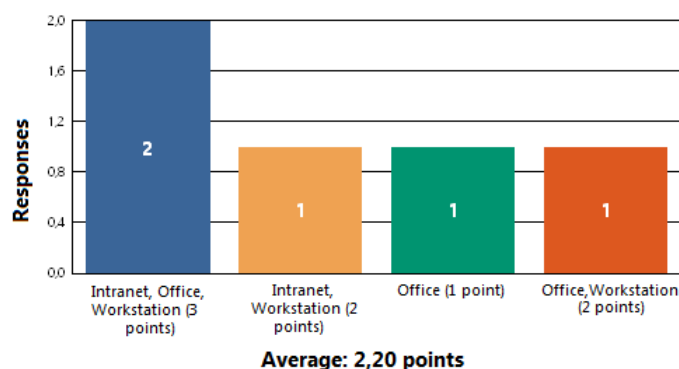
On the first page, you can find an overview.

Survey Customer satisfaction

Anonymous survey <input type="checkbox"/>	Invited addresses	5
Status The survey is activated	Answered questionnaires	5

Responses to multiple-choice questions are displayed in a chart.

1.1 What products do you use?



Responses to free text questions are listed anonymously.

1.3 What additional requirements would you like our products to fulfill?**Please list no more than 3.**

- Better form letter functionality
- Mobile capabilities
- More intranet functionality

If you have assigned points, you see an overview displaying the average number of points for each question.

xx das Bild ist deutsch - im vorherigen Leitfaden wurde das einfach weggelassen

Durchschnitt Punkte	
1 Aktuelle Kundensituation	
1.1	Wie ist Ihre aktuelle Geschäftsentwicklung? - 15,00 (4 Antworten)
1.2	Wie zufrieden sind Sie mit unseren Produkten? - Aktenschränke - 15,00 (4 Antworten)
1.2	Wie zufrieden sind Sie mit unseren Produkten? - Bodenbeläge - 15,00 (4 Antworten)
1.2	Wie zufrieden sind Sie mit unseren Produkten? - Bürostühle - 16,25 (4 Antworten)
1.2	Wie zufrieden sind Sie mit unseren Produkten? - Trennwände - 15,00 (4 Antworten)
1.4	Sind Sie mit unserem Service zufrieden? - 5,00 (4 Antworten)
2 Produkte (Wettbewerber) im Einsatz	
2.1	Welche weiteren Maschinen (Wettbewerber) setzen Sie aktuell ein? - 10,00 (4 Antworten)
3 Budget	
3.3	Wie hoch ist die Bereitschaft einen unserer Instandhaltungsverträge vorzeitig zu verlängern? - 13,75 (4 Antworten)

6 Creating and completing questionnaires

Questionnaires are automatically created for surveys or manually created for individual or multiple initial data records.

Questionnaires are their own data record type in CAS genesisWorld. You can edit questionnaire data records in a data record window and display them in list views, dossiers, and so on.

The questionnaires for the individual data records are displayed in the corresponding initial data records.

Questionnaire data records are automatically or manually created and manually or automatically published. Respondent can then complete the questionnaires three ways.

6.1 Creating questionnaires

Questionnaire data records are always created based on one initial data record. Only certain data record types can be used as initial data records, see "Questionnaire templates apply to data record types" on page 7.

Questionnaires cannot be created from the **File** menu. Any questionnaire must always be linked to an address, a project, a survey, and so on.

You can create questionnaires with or without a survey data record.

6.1.1 Created survey questionnaires

In surveys, questionnaires are always created using the survey template.

A survey questionnaire data record is created as soon as a respondent opens the questionnaire link, see "Surveys" on page 34. This function ensures that questionnaire data records are only created if the respondent participates in the survey.

Questionnaires for anonymous surveys are only automatically linked to the survey data record.

Questionnaires for surveys that are not anonymous are automatically linked with the survey and the survey addresses.

6.1.2 Creating questionnaires without surveys

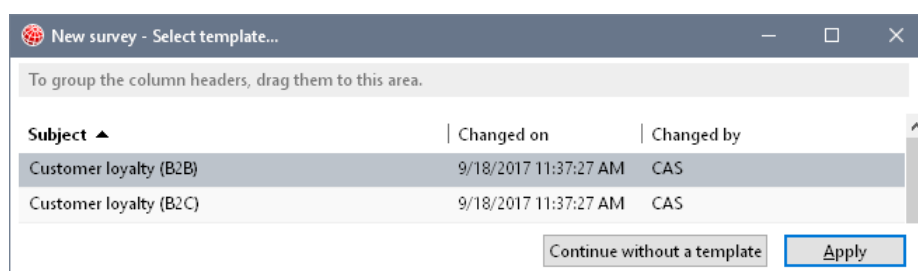
When creating questionnaires without surveys, you must define the initial data record and the questionnaire template. Without a survey, uncompleted questionnaire data records are created. If you only want to retain completed questionnaires in CAS genesisWorld after the end of the survey, you must manually delete all remaining uncompleted questionnaire data records.

✓ Select one or multiple data records in a list view.

📄 Click **New link** and then **Questionnaire**.

The following window displays those general questionnaire templates for the data record type to which you have been given the necessary rights, see "More options tab" on page 14.

Additionally, the general questionnaire template must be activated, see "Editing general questionnaire templates" on page 34.



✓ Once you have selected a template, the **Create new questionnaire** window opens.

✓ The **Questionnaires** tab is displayed in the initial data record after the first questionnaire has been created for the data record.

Other options

- ✓ To create a questionnaire for a single initial data record, you open the data record and click **New link**.
- ✓ You can create a new questionnaire in the initial data record window if the **Questionnaire** template is already displayed.
- 📄 Select the desired questionnaire template from the **New questionnaire** drop-down list.

6.2 Questionnaire data records

The questionnaire data record contains the **General**, **Change log**, and **Dossier** tabs.

To edit and save a questionnaire in CAS genesisWorld, you need rights to the questionnaire and the initial data record. You need at least the **Read** right to the initial data record, for example, the address, product, and so on. You need at least the **Edit** right to the questionnaire data record.

Multiple fields on the **General** tab are automatically filled in and cannot be changed.

The screenshot shows the 'Edit Questionnaire' window with the following details:

- Menu:** File, Edit, View, Insert, Search, Tools, ?
- Toolbar:** Save&Close, X, Print, Copy, Paste, Undo, Redo, Help
- Navigation:** Full screen, Online, Action, Short notes, Send, Link with, New link
- General Tab:**
 - Template:** Customer visit - Questionnaire for Addresses
 - Score:** (Empty field)
 - Person responsible:** (Empty field)
 - Status:** (Dropdown menu)
 - Participants:** Robert Glaser (with X icon)
 - private:**
 - confidential:**
 - Address:** Kahrmann electronic Ltd.
- Preview:**
 - Customer visit (0 of 34 points)**
 - 1 Organizational topics**
 - Basics**
 - You must complete the questionnaire after each visit with a customer or prospect.**

Fields that cannot be changed

The **Template** displays the name of the used questionnaire and the data record that is valid for this template.

The **Points scored** are automatically entered if questions with points have been answered, see "Rating tab" on page 12.

Beneath the **Participants** area, the initial data record for which the questionnaire has been created is displayed.

By clicking the icon of the data record type, you open the initial data record.

If a questionnaire has been created for the wrong initial data record, you delete the questionnaire and create a new questionnaire for the correct initial data record.


The **Status** field of a survey is automatically completed.

The questions on the lower pane of the **General** tab are automatically completed in a survey and cannot be changed.


Changeable questionnaire fields

- ✓ If the questionnaire has not been created and completed via a survey, you choose between the values **New**, **In process**, or **Completed** in the **Status** field. New questionnaires are automatically given **New** status.

The Input help of this field cannot be changed.

-  In the **Responsible person** field of a questionnaire, an address is entered. Address and questionnaire are automatically linked with each other when entering the data.

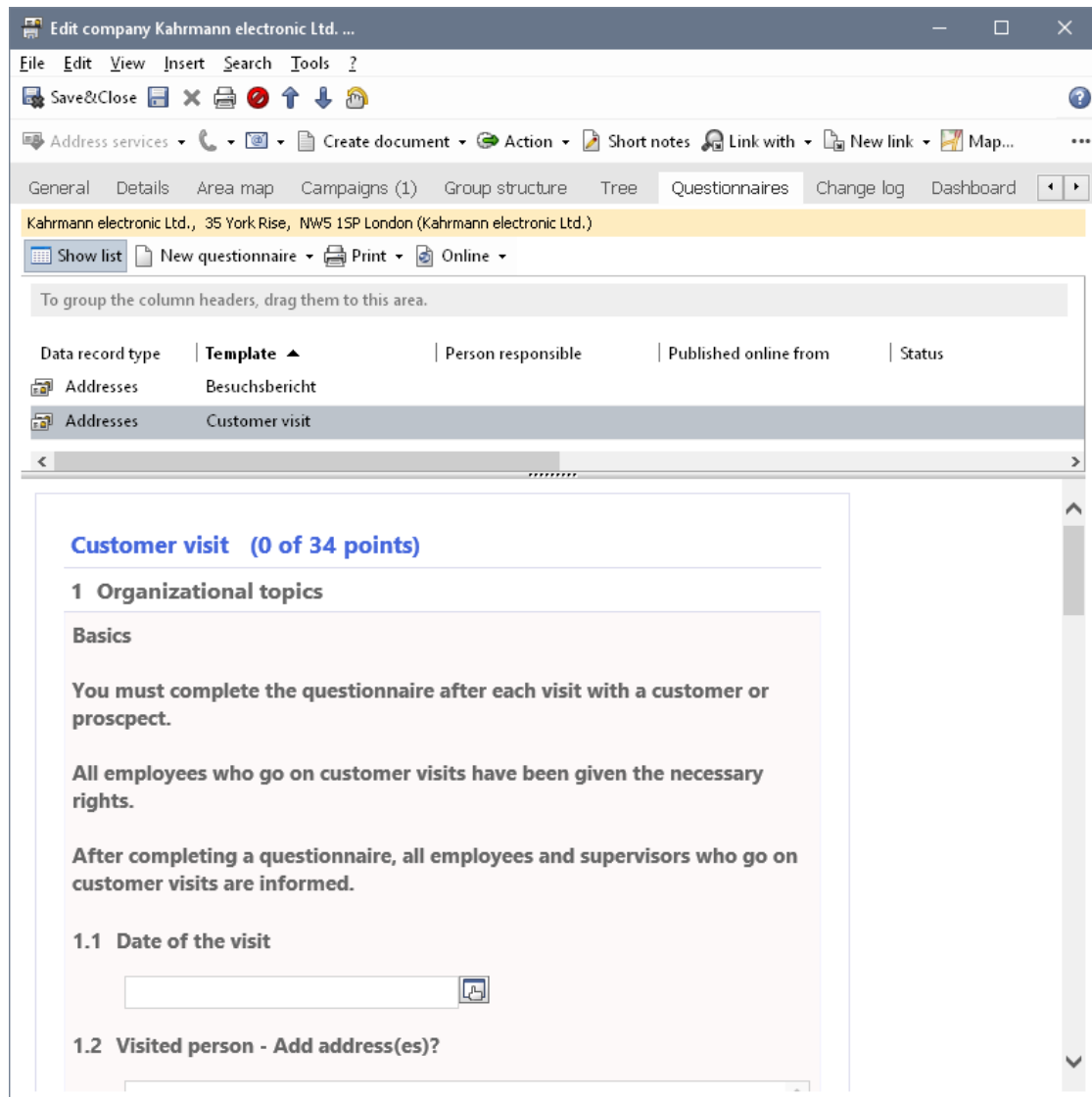
The link type in the questionnaire is **Processed by**, the link type in the address is **Edited questionnaires**.

-  With this button, the entered address is deleted from the field and the link between address and questionnaire is deleted.
- ✓ The **Participants** and **Parent** fields can be edited as usual in data records.
- ✓ The questions on the lower pane of the **General** tab can be answered if the questionnaire has not been created via a survey.


6.3 Questionnaires tab in initial data records


In the initial data record window, all questionnaires are displayed on the **Questionnaires** tab. Questionnaires that have been created for surveys are displayed on the **Questionnaires** tab in the corresponding addresses.

The questionnaires on the lower pane of the tab are automatically filled in surveys and cannot be changed. You can answer the questions if the questionnaire has not been created via a survey.




On the tab, you can find either a questionnaire or a list of existing questionnaires and the questionnaire selected in the list.


 Click the **Display list** button in the toolbar to hide or display the list of all questionnaires.

 The **New questionnaire** drop-down list shows all questionnaire templates for the data record type that is currently opened.

You create a new questionnaire for the opened data record by clicking a questionnaire template.

 In the **Print** drop-down list, you can select whether you would like to print the selected questionnaires, or whether you want to open a **Print preview**.

The printed questionnaire or the page preview displays the questionnaire exactly how it appears on the tab.

-  Using the **Online** drop-down list, you publish the selected questionnaire via Survey online.

6.4 Publishing and completing surveys

When a recipient clicks the link, the questionnaire is created as a form on the Survey online web server and can be opened and completed in the respondent's browser.

The completed questionnaire is automatically displayed in the survey.

6.5 Completing manually created questionnaires in CAS genesisWorld

You can use questionnaires for various purposes. In some cases, the answers to questionnaires could be recorded via phone calls or direct interviews, for example, for the qualification of addresses, when recording consultancy requirements of prospective customers, or for short surveys during customer days or employee celebrations.

You do not need to publish questionnaires if CAS genesisWorld users enter the answers in CAS genesisWorld. Answers can be entered on the **General** tab of questionnaire data records, see "Questionnaire data records" on page 45. Additionally, questionnaires can be completed on the **Questionnaires** tab of an initial data record, see "Questionnaires tab in initial data records" on page 46.

Any CAS genesisWorld user that has been given the necessary rights can record answers in any CAS genesisWorld client.

6.6 Publishing and completing manually created questionnaires

You use questionnaire list views to publish all or only selected questionnaires.

You publish individual questionnaires via the questionnaire data record or the **Questionnaires** tab in initial data records.

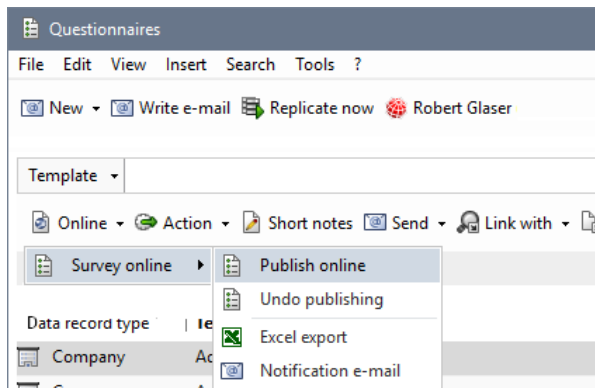
 You might have a right to publish questionnaires using Survey online.

- ✓ Questionnaires can be published via Survey online. When publishing, you define several settings.

There are two options for completing questionnaires:

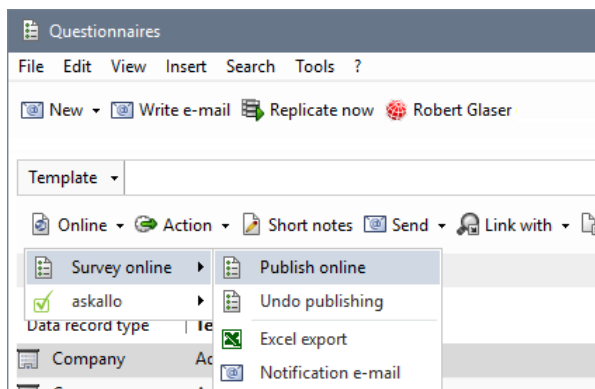
- If specific respondents are supposed to take part in the survey, you write an e-mail containing the questionnaire link.

- If the questionnaire is supposed to be available online, for example, on a website, you receive the link via the export of an Excel file, the **Online** tab, or a field in a questionnaire list view.



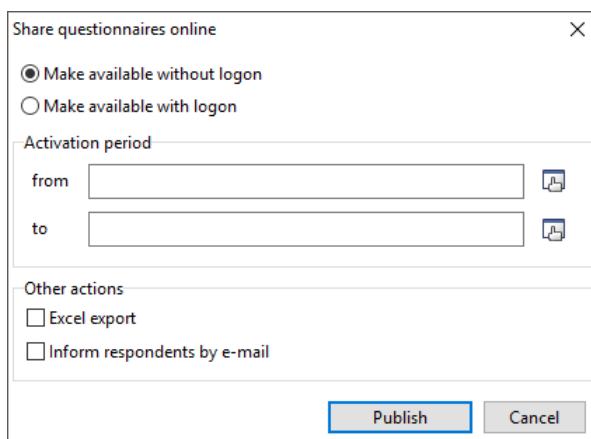
6.6.1 Publishing with Survey online

You use the **Online** drop-down list in the toolbar to publish questionnaires.



- ✓ Click **Survey online/Publish online** in the **Online** drop-down list.

The **Make questionnaires available online** window opens.



- ✓ The **Make available with logon** option serves security purposes. Only respondents that have received the questionnaire link, a name, and a password can complete such questionnaires.

You can register for a questionnaire with any address, which has been linked to the questionnaire using either the **Address** link type or the **Processed by** link type. When using the **Processed by** link type, the address that has been entered in the **Person responsible** field of the questionnaire is linked. In that way, also those CAS genesisWorld users can register for a questionnaire for whom an address exists in CAS genesisWorld. This, for example, enables the manual filling in of a questionnaire for a customer on the phone.

Respondents can use any e-mail address that has been entered in the initial address data record as registration name.

You enter the password on the **Details** tab of an address data record. The password is displayed while you are entering characters. When you save the address, the password is encrypted and saved to the database. After saving the address, the password is displayed encrypted.

👉 You can only enter a new password if you click on **Reset** before.

This option is only available in address questionnaires.

- ✓ Questionnaires stay live online unless you set a date in the **Publishing period** field to determine how long it is published live.

The publishing is undone if you click **Survey online/Undo publishing** in the **Online** drop-down list.

- ✓ By clicking **Excel export**, you export the questionnaire link, for example, to insert it on a website.

Specific fields of the addresses are also exported in case of address questionnaires.

The administrator defines which address fields are exported in the Management Console. For example, you can send the Microsoft Excel file without using CAS genesisWorld and still use the CAS genesisWorld fields for salutations, names, and e-mail-addresses

You can only export data if you have been given the necessary rights.

You can also use the same function via the **Online** drop-down list and then **Survey online > Excel** export.

- ✓ Activate the **Inform respondents by e-mail** option and click **Publish**; you can then start writing an e-mail in a new window, see "Informing about surveys" on page 51.

6.6.2 Reviewing published questionnaires and links

You can see information on a published questionnaire on the **Online** tab which is displayed in the questionnaire data record after publishing.

The screenshot shows the 'Edit Questionnaire ...' window with the 'Online' tab selected. The window contains the following information:

- Template:** Customer visit
- Link:** <http://localhost/survey/Survey.aspx?contextID=224e457d920bdd9457838eb0a9430f2a&questionnaireGuid=0xAD098C7001B741A98C64>
- Activated on:** Thursday, July 11 by Robert Glaser
- Activated from:** Thursday, July 11 to []
- Publishing status:** Published via Survey online

Buttons for 'Open questionnaire online' and 'Undo publishing' are also present.

- ✓ You cannot change the end date of the publication.
- ✓ You can copy the questionnaire link, for example, to the clipboard.
- ✓ You can also display the questionnaire link in questionnaire list views. Right-click in the row containing the column headers. Select **Add column** in the context menu and then click **Link**.

6.6.3 Informing about surveys

You can only create e-mails for address questionnaires. Before creating the e-mail, the questionnaire must have been published.

- ✓ Activate the **Inform respondents by e-mail** option in the **Publish questionnaires online** window and then click **Publish**.

You find the function to inform respondents also in a list view and in the data record of a questionnaire in the **Online** drop-down list at **Survey online**.

- ✓ Choose whether you want to create the e-mail with or without a template.

You can also retroactively select a template.

The **Edit e-mail** window opens. The functions in this window are mostly the same as when creating an e-mail campaign except for the survey adjustments.

Only specific templates for questionnaires are displayed.

- ✓ In the **Edit e-mail** window, you will see the **Save template** and **Load saved template** options on the right.

With **Load saved template**, you can select a template at a later time.


Write a new e-mail or change the loaded template, and then create a custom template for questionnaires with **Save template**.

- ✓ You use fields from the address data record as **Mail merge fields**.
- ✓ You insert the questionnaire **Link** or the publishing period via **Questionnaire fields**.
- ✓ You save a new e-mail campaign for future surveys by clicking **Save template**.
- ✓ By clicking **Load saved template**, you can select a template after opening the **Edit e-mail** window.
- ✓ The e-mail recipients are automatically adopted from the addresses that are linked to the questionnaires. Click **Show recipients** to open a window in which you can check the recipients.

For each recipient, the default e-mail address is used for sending.

- ✓ If you enable **E-mail archiving**, the e-mail you send to recipients is archived once sent.

The archived e-mail is linked to the respective address for each recipient.

-  The **Send e-mail** button is only active if you have entered a **Subject** and all address data records of the recipients contain a default e-mail address.

6.6.4 Completing questionnaires

When recipients click the link, the questionnaire is opened in the browser and can be completed.

After the questionnaire has been completed, the questionnaire is transferred to CAS genesisWorld by clicking **Send questionnaire**. The results are saved to the respective questionnaire data record.

Questionnaires are linked with the initial data records.

An anonymous survey is not possible without a survey data record as questionnaires for addresses, projects, and so on are created.

7 Notification and action service

With Survey, additional functions can be used for the notification and action service.

You can insert a placeholder for a questionnaire link in a notification.

Before visiting a customer, information about a customer is entered in a questionnaire, for example, the reason for the visit, intentions and characteristics of the customer. A rule defines that a link to a questionnaire is entered for appointments of a certain type and that employees are notified.

✓ On the **Event** tab, you select **Link change** as the **Event type**.

 By clicking **Insert link for questionnaire** on the **Action** tab, you open a window.

✓ In the window, you can only select questionnaire templates for which the **Allow multiple questionnaires for one data record** option has been activated, see "More options tab" on page 14.

When a recipient of the notification clicks the link, a new questionnaire is created on the Survey online web server and opened in the recipient's browser.

8 Important information for administrators

First, you must enter the license and activate it for users. Specific settings and the setup of Survey online require further settings.

Licenses

For Survey, you can activate two licenses for users which differ in their scopes concerning the creation and structuring of surveys.

- With the **Survey Manager** license, users can create surveys and questionnaire templates. Furthermore, users can activate, deactivate, and use questionnaire templates.
- With the **Survey Client** license, users can edit surveys and create questionnaires on the basis of questionnaire templates and complete them.
- The activation is made by the administrator in the Management Console.

Further setup, specifications, and settings

In the **User management** area, the administrator defines rights to data record types and other rights.

Survey online is installed and set up separately.

In the **Survey** area in the Management Console, you define specifications for all surveys and the Survey online integration.

Questionnaires and surveys are data record types. Therefore, you can access the usual functions in the **Database** area of the Management Console, for example, setting up input assistance options.

8.1 Rights

In the **User management** area, you define settings on the **Rights** and the **Other rights** tabs.

Rights tab

- ✓ Check whether the users for whom you have activated a Survey license have the rights to the survey and questionnaire data record types and edit the rights if necessary.

In contrast to other data record types, you cannot define user-specific rights to fields that can only be found in questionnaire data records.

In addition to the rights to a questionnaire, a user needs at least read rights to the initial data record of the questionnaire. Without the **Read** right to the initial data record, users cannot view the corresponding questionnaire even if they have been entered as participants in the questionnaire data record.

Users can only see or edit questions with field binding in questionnaires if the user has the necessary rights to the fields of the corresponding data record. If a question is not displayed due to lacking rights, all questions which are related to the initial question via filter conditions are also hidden.

Rights to input assistance options are included in questionnaires. In questions with field binding, only those input assistance options are available to which a user has access. In online questionnaires, input assistance options with limited access are usually not available.

Other rights tab

- ✓ The **Import/Export** right is required for exporting survey addresses to Microsoft Excel, see "Addresses tab" on page 38.
- ✓ Define whether users can publish online questionnaires using Survey online.

8.2 Installing and setting up Survey online

With Survey online, you publish online questionnaires on your own web server. You can also publish questionnaires that have not been created for a specific address. A URL consisting of random values is generated automatically for each questionnaire available online.

Users need another right to publish questionnaires using Survey online, see "Rights" on page 54.

Installing Survey online

Survey online requires a separate installation. You find the setup file in the ..\Portals folder of the respective CAS genesisWorld software update.

The computer you decide to use for Survey online must fulfil the following criteria:

- You have to install Microsoft Internet Information Services (IIS).
- A CAS genesisWorld Application Server and a Desktop Client must be installed on the respective computer.

During the installation, the default language of the database is used. You cannot change the language when using Survey online.

When installing a new main version, first uninstall the existing version and then install the new version. When Survey online is uninstalled, settings in the Internet Information Services (IIS) that were defined for the timeout, for example, are reset. After installing the new version, the default settings in the Internet Information Services (IIS) will have to be changed again.

Within a main version, Survey online can be updated without prior uninstallation.

Setting up Survey online web servers


A web server for publishing questionnaires online is created during the installation. During the installation, all necessary settings in the web server are automatically set.

You may have to adapt these settings to suit your requirements, for example, for security certificates and SSL encryption.

Management Console settings

The link or URL of the web server and the settings for exporting questionnaires are defined in the **Survey** area of the Management Console.

8.3 Survey area in the Management Console

 In the **Survey** area of the Management Console, you define specifications for questionnaire templates and questionnaires as well as the settings for Survey online.

8.3.1 General

The administrator defines the following specifications for questionnaire templates and questionnaires:

- which data record types you can use for surveys,

- in which data record types questionnaires for parent data records with primary links are displayed,
- and whether questionnaire templates that are already in use are blocked from being edited.

Questionnaire templates apply to specific data record types

You can create questionnaire templates for specific data record types, for example, for addresses and all address types, only for individual contacts and contact persons, or also for projects and opportunities.

Address type questionnaire templates

There are different options for address types.

- You can allow that questionnaire templates can be created for all addresses. Those questionnaire templates can be used for all address types.
- And you can define that questionnaire templates can only be created for **Companies** and/or **Contact persons**. Questionnaire templates must then be created specifically for these address types and the templates can be used only for the corresponding address type.
- Individual contacts are both a company and a contact person. Therefore, you can create templates for individual contacts even if only questionnaire templates for **Addresses**, **Companies**, or **Contact persons** are allowed.

If a company is to be created from individual contacts, then the links for questionnaires may have to be changed. This does not happen automatically.

The **Questionnaires** tab is displayed in data record windows of those data record types for which you have allowed the creation of questionnaires. This does not apply if the administrator has limited the visibility of the tab, for example, for data records with specific values in the **Type** field.

The visibility of tabs is set in the Management Console, in the **Miscellaneous** area.

Excluding data record types from using questionnaire templates

If questionnaire templates have already been created for a data record type and you want to forbid the creation of new questionnaire templates for the data record type, the existing questionnaire templates are retained in the Desktop Client and remain active. If the questionnaire templates are no longer supposed to be used, you must deactivate them in the Desktop Client.

This function mirrors the function of deactivated questionnaire templates in the Desktop Client as completed surveys or questionnaires are also retained even after deactivation of the template.

Questionnaires of parent data records

Questionnaires can be linked to data records that contain primary links to parent data records.

Only certain data record types can be parent data records.

If a questionnaire was created for a data record with a primary link, questionnaires can also be viewed and created via the parent data record.

The administrator defines this option in the Management Console.

Examples

You can create questionnaires for phone calls and you enter primary links to addresses in phone call data records. If questionnaires of parent data records are displayed, the questionnaires of the corresponding address are also displayed on the **Questionnaires** tab of the phone call data record. Furthermore, you can also create questionnaires for the address on the **Questionnaires** tab of the phone call.

If questionnaires for parent data records are displayed for contact persons, questionnaires of the respective company are also displayed in the **Questionnaires** tab. Additionally, you can create questionnaires for contact persons in the company data record. You can also create questionnaires for the corresponding companies on the **Questionnaires** tab of contact person data records. Existing company questionnaires are also displayed in each corresponding contact person data record.

Locking questionnaire templates

You use questionnaire templates to create questionnaires. Those questionnaires are used to conduct a survey and save answers to the questionnaire's questions.

If questions in the questionnaire template are deleted after data has been collected, the collected data is also deleted.

When deleting questions in questionnaire template, you will not receive a security notification in the Desktop Client even if the template has already been used to create questionnaires. You cannot retrace any occurring data loss.

Therefore, the administrator can lock the editing of questionnaire templates if the template has already been used to create questionnaires.

8.3.2 Survey online

Survey online requires a separate installation, see "Installing and setting up Survey online" on page 54.

To publish questionnaires on the Internet, the Web server or CAS genesisWorld application server address has to be entered in the Management Console. The Web server and application server are usually installed on the same computer.

✓ Click **Survey online** in the **Survey** area and enter the link.

The Survey online link consists of the name of the computer or the IP address of the web server and the alias name for the portal. You will already have entered the alias name for the web server's virtual folder during the installation.

Using forwarding, the questionnaires are then available via the internet.

The screenshot shows the 'Survey online' configuration page in the CAS Software Management Console. The interface includes a left-hand navigation pane with 'Survey online' selected under the 'Survey' area. The main content area is titled 'Survey online' and contains three distinct sections:

- Survey online settings:** A text input field for 'Survey online link' contains the value 'http://localhost/survey'. Below it is a button labeled 'Test Survey online link'.
- Excel export settings for address questionnaires:** A text input field for 'Address fields' contains the value 'Form of address,First name,Name'. A pencil icon is visible to the right of the input field.
- Design template for questionnaires and surveys:** This section features a toolbar with icons for 'New', 'Edit', 'Duplicate', 'Preview', and 'Delete'. Below the toolbar is a table with the following data:

Name	Background color	Accent color	Font color
BLACK	Grey	Black	Black
Black-white	White	Black	Black
Grey-blue	Grey	Blue	Black

 At the bottom of this section, there is a 'Default design template' dropdown menu currently set to 'Grey-blue'.

 In address questionnaires, you can export individual questionnaire links and specific address fields from the Desktop Client to Microsoft Excel. Select the **Address fields** you wish to export.

Design templates for questionnaires and surveys

Using design templates, you define template layouts for questionnaires with or without survey data records which can then be used in Survey online. The design templates included with CAS genesisWorld cannot be changed or deleted.

The **Default design template** applies to new templates or templates without defined design.

- 📄 Click **New** or double-click to open a window containing the layout settings.
- ✓ You can change **Background colors**, **Accent colors**, and **Font colors** by either using the **Select** button, or entering a hexadecimal value directly for the desired color.

The **Background color** is applied to the whole page.

The **Accent color** is used for the progress bar and the buttons in the questionnaire.

The **Font color** is used for the normal font.

- ✓ Use the slider to set the **Font size**.
You select the **Logo** from a folder. The maximum image size is 500 x 200 pixel.
- ✓ Using the **Preview** button, you can view the questionnaire you created and check your settings in your default browser.