



Forms & Surveys

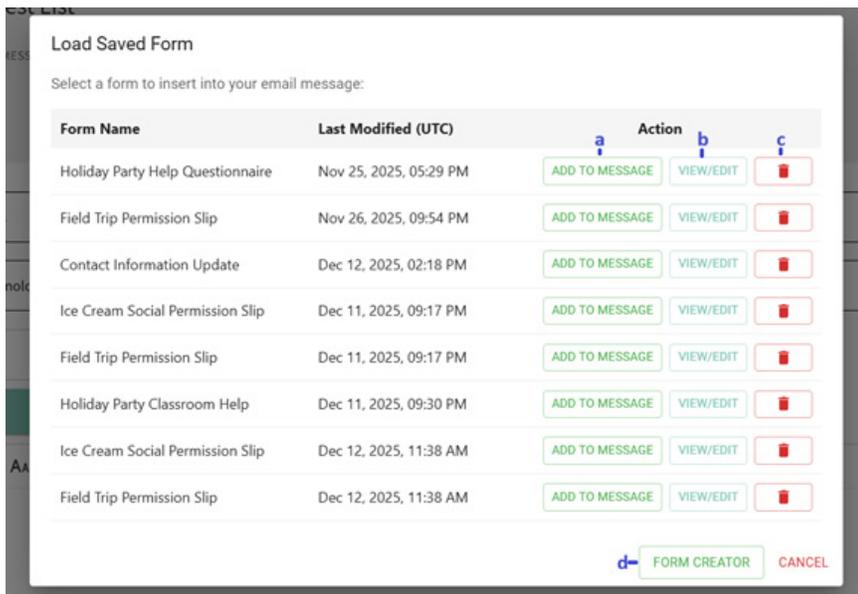
Getting Started—Create the Form or Survey

- Start by clicking on the name of the list that you want to send the form or survey to, then create a new message.
- Mark the “Email” box as the message type.
- On the email message creation page, click the Add Form button to start creating your form or survey or to open a form/survey you’ve previously created.

A new window will open showing a list of all the surveys/forms that are already created in your account.

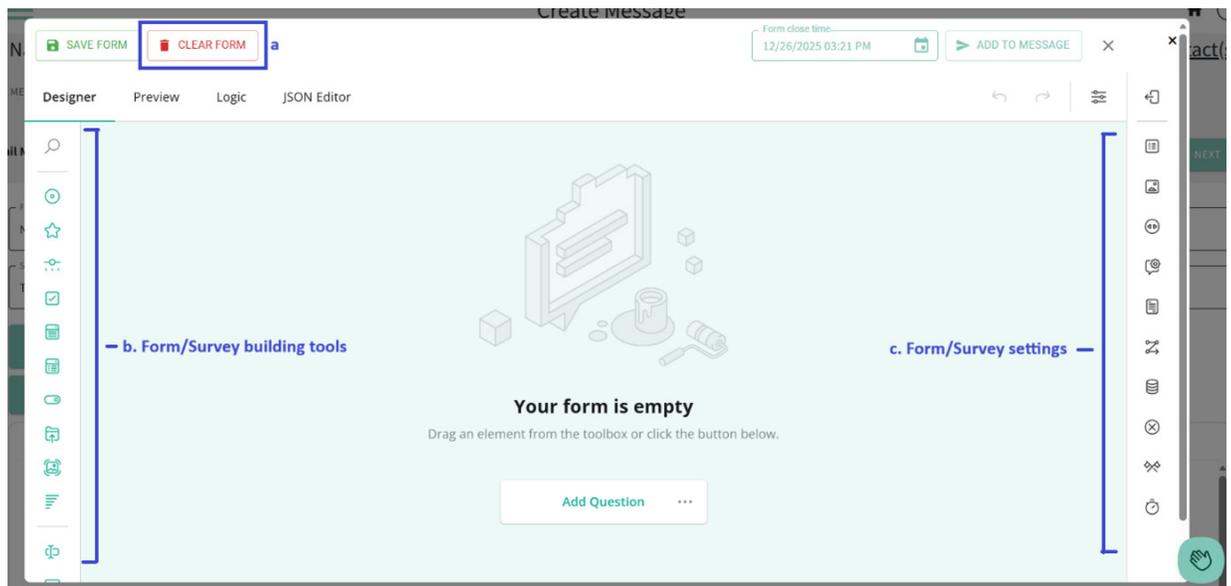
- Click the “Add to Message” button to add the form directly to your email message.
- Click the “View/Edit” button to view and/or edit the form.
- Click the “Delete” trash can icon to permanently delete the form from your account.
- Click the “Form Creator” button to start creating a brand new form.



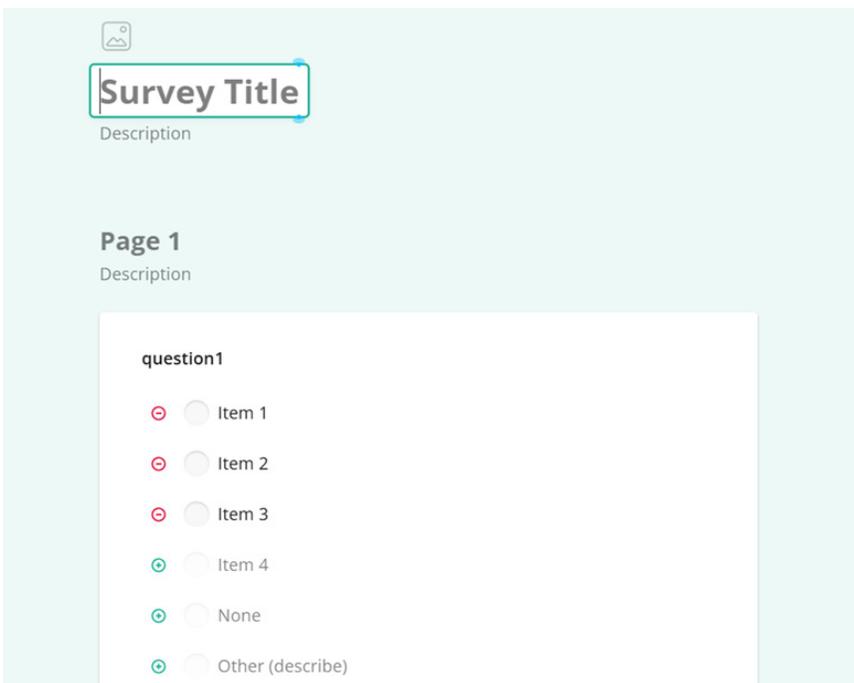


After clicking either the View/Edit button or the Form Creator button, the Forms/Surveys creation window will open and you can start creating or editing your form.

- When you open the form creator, the last form you were working on will load automatically. You can click “Clear Form” to start a new form.
- Use the icons on the left to build your form or survey. Clicking any of the various options on the left will allow you to create a new question in that format.
- Use the icons on the right to designate settings for the form or survey.



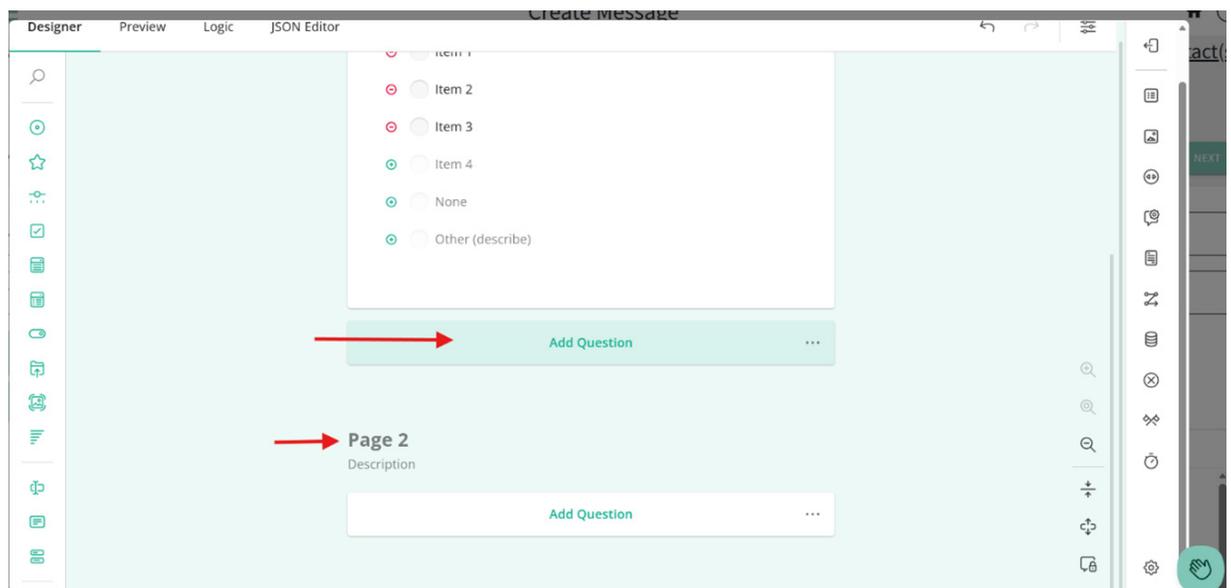
Click on any item within your form to edit it to your liking.



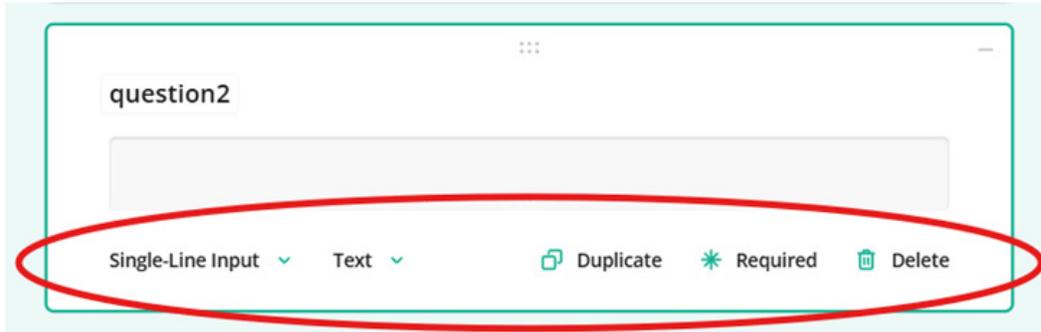
The screenshot shows a form designer interface. At the top, there is a "Survey Title" field with a description below it. Below that is "Page 1" with its own description. The main content area contains a question labeled "question1" with six radio button options: "Item 1", "Item 2", "Item 3", "Item 4", "None", and "Other (describe)".

As you scroll down toward the bottom of the form designer window, you can add additional questions by clicking the “Add Question” button. If you want multiple pages in your form, click “Add Page.”

- Note that the form designer pre-populates the option for additional questions and pages to be added, but don't worry if you add nothing there, they will not populate to your final form that you send out.

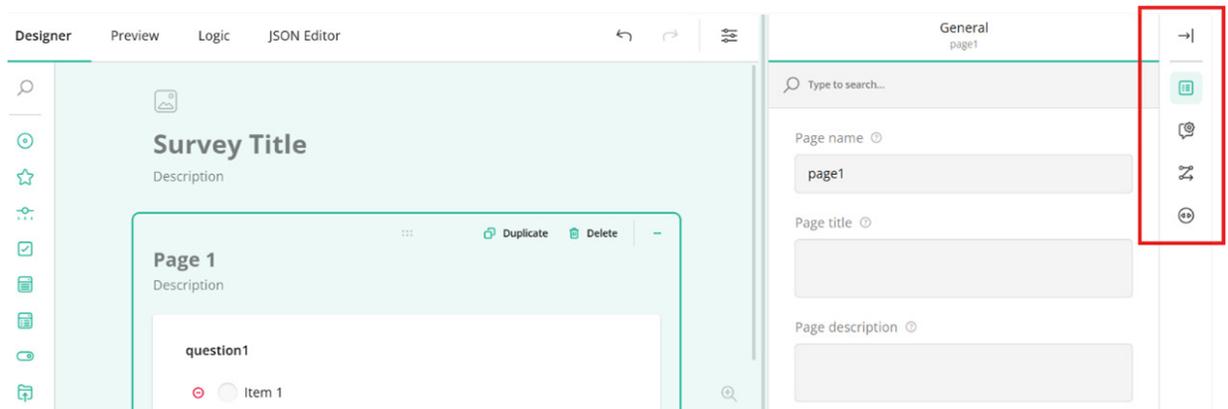


Clicking “Add Question” will add a new question to your form. Using the options at the bottom of the question panel, you can choose what type of question you want to use, format how answers are input, mark the question as “required,” or even duplicate the question. Duplicating the question is especially helpful if you’ve added formatting using the settings from the right side panel that you want to use in your next question, too.

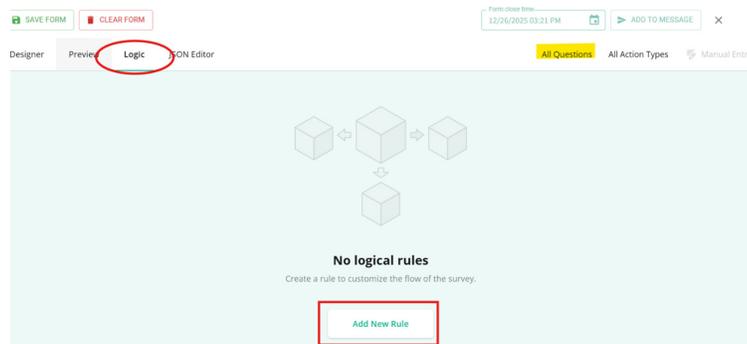


Add logic to your questions using either the settings panel on the right side of the page or by clicking the “Logic” tab at the top of the screen.

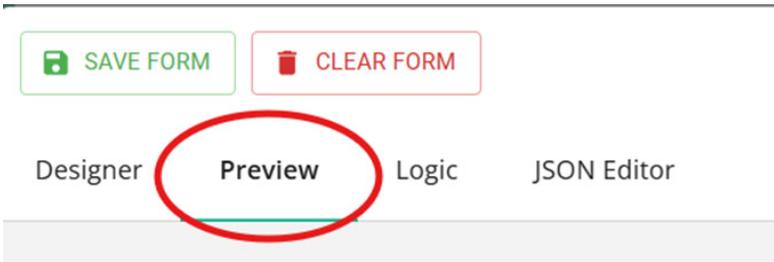
- Using the settings in the right hand panel, you can name your questions, add logic such as “if question 1 is answered, then show question 2,” and determine exactly how your questions will populate for your contacts. The settings panel is great for adding logic and other specifications to individual questions. First, click in the question box, then click any of the icons in the right hand panel.



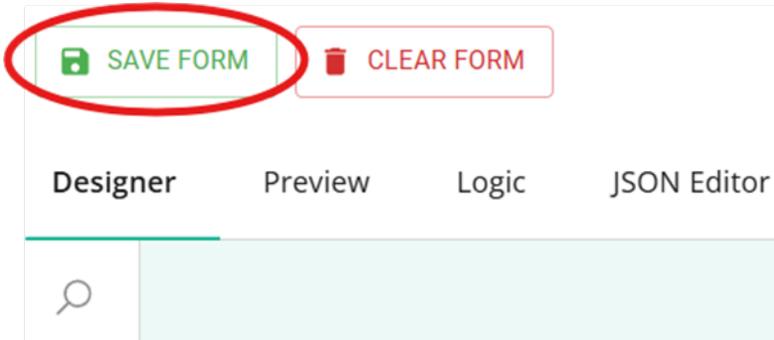
- To apply logic to specify the flow of the entire form/survey, use the “Logic” tab located at the top of the screen.



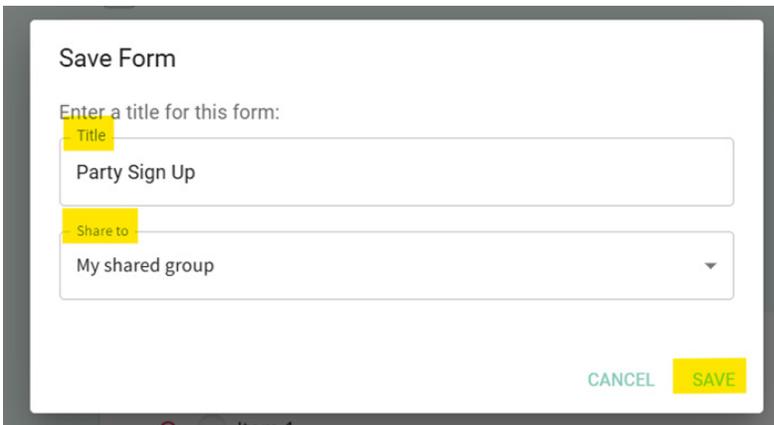
Once your form or survey is created, you can preview it by clicking the “Preview” tab at the top of the screen.



Now that your form/survey is to your liking, click the “Save Form” button so you don’t lose any changes.



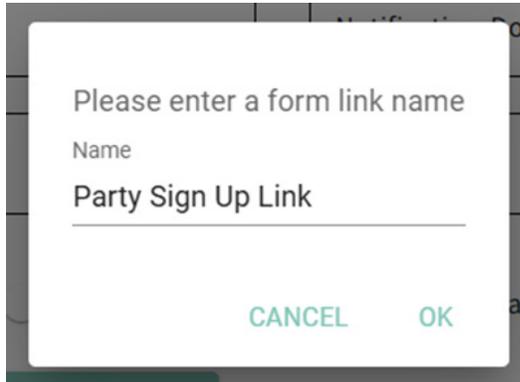
In the pop-up window, give your form a name that will make it easy to find again in the future and use the “Share To” option to specify if you would like to share the form with any other BrightArrow users in your organization. Then, click “Save.”



With your form now saved, you can pull it up again later (reference the step above in this article), or add it to your email message right away using the “Add to Message” button. You can also set the “Form Close Time” if you’d like to set an expiration date/time so that it cannot be completed by your contacts after the Form Close Time has lapsed.



Once you've clicked "Add to Message," you will be redirected back to the email creation page. A pop-up window will appear asking you to name your form link. Whatever you type there is what the link to your survey will show as to your contacts. After you've given your form a name, click OK.



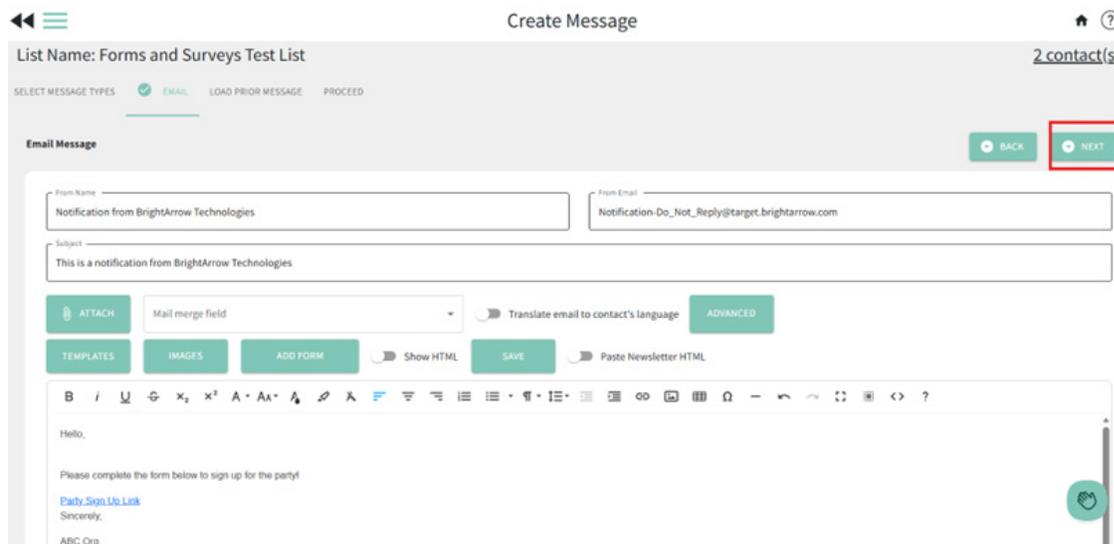
Please enter a form link name

Name

Party Sign Up Link

CANCEL OK

The link to your form/survey is now added to the email body. Add any additional text as needed, and remember to change the subject line, from name, etc. before sending your email.



Create Message

List Name: Forms and Surveys Test List 2 contact(s)

SELECT MESSAGE TYPES EMAIL LOAD PRIOR MESSAGE PROCEED

Email Message BACK NEXT

From Name: Notification from BrightArrow Technologies

From Email: Notification-Do_Not_Reply@target.brightarrow.com

Subject: This is a notification from BrightArrow Technologies

ATTACH MAIL MERGE FIELD TRANSLATE EMAIL TO CONTACT'S LANGUAGE ADVANCED

TEMPLATES IMAGES ADD FORM SHOW HTML SAVE PASTE NEWSLETTER HTML

Hello,

Please complete the form below to sign up for the party!

[Party Sign Up Link](#)

Sincerely,

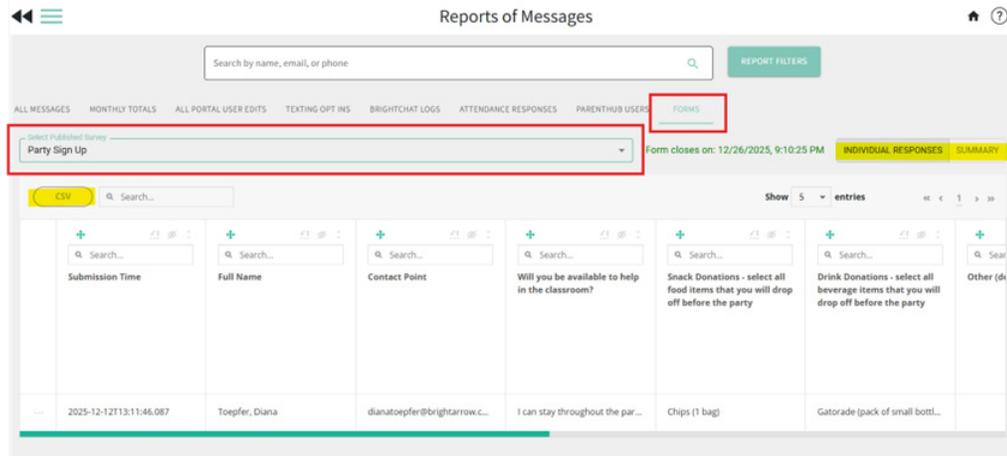
ABC Org

Click "Next" to proceed through the message creation pages to send out your message.

Viewing the Results

Once your survey or form has been sent, you can see the responses in the BrightArrow Reports Page under the “Forms” tab.

- Use the “Select Published Survey” drop-down menu to select the form you wish to view responses.
- Click “Individual Responses” to see details of what each recipient responded.
- Click “Summary” to view summary charts that show the overall results of your survey.
- Use the “CSV” button to export the results to a CSV file to filter and analyze the results.



The screenshot displays the 'Reports of Messages' interface. At the top, there is a search bar and a 'REPORT FILTERS' button. Below this, a navigation menu includes 'ALL MESSAGES', 'MONTHLY TOTALS', 'ALL PORTAL USER EDITS', 'TEXTING OPT INS', 'BRIGHTCHAT LOGS', 'ATTENDANCE RESPONSES', 'PARENTHUB USER...', and 'FORMS'. The 'FORMS' tab is selected and highlighted with a red box. Below the navigation menu, a dropdown menu labeled 'Select Published Survey' is open, showing 'Party Sign Up' as the selected option. To the right of the dropdown, it says 'Form closes on: 12/26/2025, 9:10:25 PM'. Below this, there are buttons for 'INDIVIDUAL RESPONSES' and 'SUMMARY'. A 'CSV' button is also visible. The main content area shows a table with columns for 'Submission Time', 'Full Name', 'Contact Point', 'Will you be available to help in the classroom?', 'Snack Donations - select all food items that you will drop off before the party', 'Drink Donations - select all beverage items that you will drop off before the party', and 'Other (d...'. The first row of data shows a submission time of '2025-12-12T13:11:46.087', a full name of 'Toepfer, Diana', a contact point of 'dianatoepfer@brightarrow.c...', and responses for the snack and drink questions: 'I can stay throughout the par...', 'Chips (1 bag)', and 'Gatorade (pack of small botti...'. The table has a 'Show 5 entries' control and navigation arrows.