

THE ULTIMATE GUIDE TO

# Forms & Surveys

By The Zapier Team

# **The Ultimate Guide to Forms and Surveys**

Everything you need to know about building effective forms and surveys that will help you gather the data you need and put it to work in your business.

Zapier

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*They're so simple: just a few fields, a bit of text, and a Submit button. From order and signup forms, to your tax and medical history forms, to surveys about your telephone service and last night's dinner, forms and surveys are ubiquitous. They surely can't be that hard to make.*

*Yet behind the apparent simplicity in forms and surveys lies the choice of apps to build the form, the tedious field tweaking to make the form or survey work correctly, the careful wording of questions to make an effective survey, and the work to analyze the data and make sense of it for your business.*

*It's a lot to take on. That's why you need this eBook.*

*In Zapier's Ultimate Guide to Forms and Surveys eBook, you'll find lists of the best apps to build a survey or form for any device, along with guides to the most popular tools you'll use in your form and ways to automate your work. You'll then find guides to analyzing your survey data, and ways to create powerful business solutions from just a form. There's even cheat sheets and sample spreadsheet files to help you get more out of your forms and surveys.*

*We help people do more with their forms and surveys every day at Zapier. In this book, you'll find some of our best tips to make your own forms and surveys so great, your users will be tempted to think forms are simple, too.*

## **Who Is This Guide For?**

*If you've ever wanted to collect data in a form or survey, this book is for you. If you've never made an online survey and don't know where to start, you'll find the apps and tips you need in this book to confidently make your first forms and surveys. Or, if you already*

*have your own forms, but want to make them more powerful, this book has tips to automate your form and turn it into a powerful business tool. And, for advanced form and survey builders who want better ways to use the data your forms generate, you'll find the tips you need in this book.*

*It's everything you'll need to get started collecting data better with forms and surveys.*

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*Written by the Zapier marketing team, with content from Christopher Peters, Danny Schreiber, Matthew Guay, and freelance writer Stephanie Baedell. Original cover artwork by Stephanie Briones.*

# Contents

Who Is This Guide For? . . . . .	iii
<b>Chapter 1: What’s the Difference Between Forms, Surveys, and Polls?</b> . . . . .	<b>1</b>
Surveys . . . . .	1
Polls . . . . .	2
Forms . . . . .	3
Making Your Own Forms, Surveys, and Polls . . . . .	4
<b>Chapter 2: The Best Online Form Builders for Every Task</b> . . . . .	<b>5</b>
The Form Builders You Should Try . . . . .	6
Google Forms . . . . .	8
JotForm . . . . .	10
Formstack . . . . .	12
Typeform . . . . .	13
iFormBuilder . . . . .	14
FormSite . . . . .	15
123ContactForm . . . . .	16
Formbakery . . . . .	18
Formdesk . . . . .	19
FormAssembly . . . . .	20
Gravity Forms . . . . .	21
Formidable . . . . .	22
Device Magic . . . . .	23
Cognito Forms . . . . .	24
FormKeep . . . . .	26

## CONTENTS

Ninja Forms . . . . .	27
PlanSo Forms . . . . .	28
Picking the Best Form App . . . . .	29
Putting Your Form to Work . . . . .	30
Generate PDF and Word Documents . . . . .	32
Bonus: Download a Form App Cheat Sheet . . . . .	35
<b>Chapter 3: Remote Data Collection: The Best Apps for Gathering Data in the Field . . . . .</b>	<b>37</b>
Replacing Paper and Clipboards . . . . .	38
Fit Mobile Forms Into Your Workflow . . . . .	51
<b>Chapter 4: 8 Overlooked but Powerful Form Features . . . . .</b>	<b>57</b>
Form Features Your Should Know . . . . .	58
1. Logic for Customizing Questions Per Respondent . . . . .	59
2. Hidden Fields for Tracking Referrals . . . . .	61
3. Predefined Choices for Faster Form Set Up . . . . .	65
4. File Uploads for Easy File Collection . . . . .	68
5. Images, Icons and Videos for a Better Experience . . . . .	70
6. Field Validation for Guaranteed Results . . . . .	72
7. Payments for More Capabilities . . . . .	73
8. Integrations for Automated Data Entry . . . . .	74
More Form Features . . . . .	76
<b>Chapter 5: There's a Form for That: 20+ Ways to Optimize Form Apps for Your Work . . . . .</b>	<b>78</b>
Use Form Software to: . . . . .	79
Streamline Your Communications . . . . .	79
Manage Your Data . . . . .	86
Connect With Any App . . . . .	91
Build Your Own Startup . . . . .	99
Keep Your Company Going . . . . .	107
There's So Much More You Can Do . . . . .	114
<b>Chapter 6: Surveys 101: A Simple Guide to Asking Effective Questions . . . . .</b>	<b>116</b>

## CONTENTS

Surveys: Where to Begin . . . . .	117
Getting Answers: Survey Question Types . . . . .	118
6 Best Practices for Writing Survey Questions . . . . .	122
Survey Pitfalls to Avoid . . . . .	126
Tips on Survey Format . . . . .	128
A Final Tip Before You Begin . . . . .	130
<b>Chapter 7: The Best Online Survey Builder Tools . . . . .</b>	<b>132</b>
The Best Survey Apps . . . . .	133
Put Your Survey to Work . . . . .	156
Integrate Any Survey Builder via Email . . . . .	161
Bonus: Download a Survey App Cheat Sheet . . . . .	163
<b>Chapter 8: How to Design and Analyze a Survey . . . . .</b>	<b>165</b>
1. How to Design a Survey . . . . .	167
2. The Best Survey Question and Answer Styles . . . . .	168
2. How to Phrase Survey Questions and Answers . . . . .	171
4. How to Select Survey Respondents . . . . .	174
5. How to Calculate the Number of Survey Respondents You Need . . . . .	176
6. How to Analyze Survey Results . . . . .	177
7. How to Interpret Survey Results . . . . .	185
Conclusion . . . . .	187
<b>Chapter 9: Building an App the Simple Way: 6 Database-     Powered App Builders . . . . .</b>	<b>190</b>
The Need for Custom Internal Tools . . . . .	191
The Database Builder Solution . . . . .	193
What is a Database? . . . . .	194
1. Lay the Foundation . . . . .	197
2. Pick a Database Builder . . . . .	198
3. Put Your New Internal Tool to Work . . . . .	210
Go Learn Something New! . . . . .	218

# Chapter 1: What's the Difference Between Forms, Surveys, and Polls?

→ What's your favorite type of food?

<input type="radio"/> A Chinese	<input type="radio"/> B Mexican	<input type="radio"/> C Italian
<input type="radio"/> D Thai	<input type="radio"/> E American	<input type="radio"/> F Other

Quick: Is it a form, a survey, or a poll?

When you're wondering if your customers enjoy new features in your app, are curious about your patrons' eating preferences, or need know how many of your users own an iPhone, where do you start? Should you be using a form, a survey, or a poll?

Great app options exist for each, and frankly they can be interchanged to a certain degree: You can make a poll with a survey app, a survey with a form app, and a simple survey with a poll app (you get the idea).

So, what makes each type of app different, and should you be building a form, survey, or poll to gather the data you need?

## Surveys

It all starts with what makes a survey different. A survey is a form with questions specifically designed to gather information about



people's experiences, preferences, wants, and needs. Surveys can be long, so a poll is a survey with just one question—a simple survey. And a form could be anything—a survey, a poll, an order form, a quiz, an RSVP sheet, or anything else where you need to gather data.

Form apps are broad. They include features you might need for any type of form. Poll apps are simple. They're designed just to let you ask one question, typically with bullet-point responses.

Survey apps are right in the middle. They're designed to help you ask questions, so they include field formats specifically designed for questions. There are multiple choice questions, sure, but also advanced questions with multiple drop-downs, matrix blocks, and more. Some apps will even include pre-made questions and survey templates to help users get unbiased results. Surveys can include dozens of questions, so your survey app will likely let you break the survey into multiple pages. And, the results pages and dashboards are designed to help you analyze your survey results and understand what your audience is thinking.

If you want to gather data about your customers or opinions from your colleagues, a survey is what you need. When you fill out a census form, or answer questions at a doctor's office about your family's medical history, that's a survey.

## Polls

Polls are almost the same, with one caveat: they only include one question. Those tiny blocks at the bottom of sites that ask “Did you find everything you were looking for today?” or the SMS codes on the bottom of receipts that ask you to rate your meal or service quality? Those are polls.

You hear about polls often in the news—especially near election time—but anyone can make a poll just the same as a survey. The

only trick is, you can only include one question. Add in anything else, and you've turned your poll into a survey. That's why most poll apps are designed to only let you add one question. They're really, really simple to use.

If you want a simple way to gather data about one thing, you need a poll. You won't get very nuanced answers, or extra data to correlate your answers to other factors, but you will be likely to get a lot of answers simply because a poll is so easy to answer.

## Forms

Forms, as you've guess by now, are in many ways the superset of polls and surveys. Both a poll and a survey could be called a form, and you could build either with a form app. Form builder apps are the Swiss Army Knife of data collection tools—they include everything, and can be used for gathering just about any type of data.

You could make a form with just one question, and that'd be a poll. Add in a few more questions, and it'd be a survey. Add in a button to upload a file or a payment field to sell your products, and your creation could now only be called a form.

Form apps are a bit different. They'll include many of the same field options as you'd find in a survey app—multiple choice questions, drop-down fields, and more—but they likely won't include pre-made questions and tools to help you analyze answers. Instead, they'll be focused on helping you gather data. You'll find file upload fields, tools to capture images and drawings, and even payment fields to create order forms. There will likely be more advanced tools to tweak your form and show certain fields dynamically, and if you look hard enough you'll find specialized form apps that are designed for mobile data collection or include tools to help build your own apps.

For the most flexibility in gathering any type of data, you need a form builder. It'll let you make just about anything you want—including a survey or a poll.

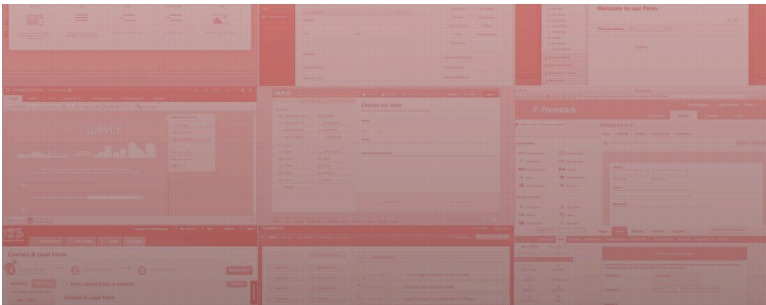
## Making Your Own Forms, Surveys, and Polls

Now that you know exactly what you need to make, it's time to find the tools you need to make great forms, surveys and more. In the next chapter, you'll find over a dozen of the [best tools to make a form](#)—or if you already know you want to make a survey, you can jump ahead to Chapter 6 to find one of the [best tools to build a survey](#).

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*Written by Zapier Marketer [Matthew Guay](#).*

# Chapter 2: The Best Online Form Builders for Every Task





















When you need to collect information, learn people's preferences or gather feedback, there's nothing better than a form. Sure, forms can be boring, but that depends on what tool you choose and how you use it. You can make a form interesting, simple to fill out, and then, with the help of [Zapier](#), automatically put the results to work for your team.

But what form builder is the best for you? A broad sweep of a dozen-plus popular tools today shows that just about all form editors are the same. They give you a blank form in the center of your screen and a list form elements on the side. Their price tags and features, such as uploading attachments or creating reports, are what differ most.

## The Form Builders You Should Try

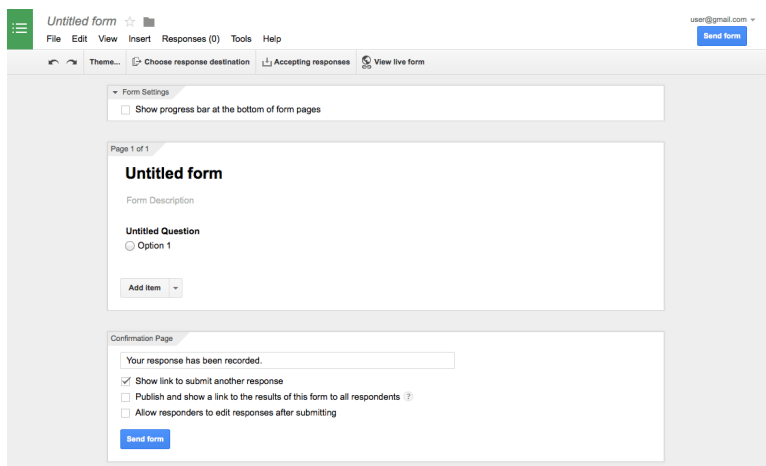
There are more form apps than we could ever cover in one chapter or article, so we've picked the ones possessing features that stuck out to us. Each of these are *form* apps, not survey apps: the latter are great for surveys, while the former let you make any type of form, from a survey to a simple contact form to an advanced order form or training quiz. They have the basics you'd need to make any type of form you want, with enough unique features in each app to make you want to try out several.

Looking for a survey app? Jump to chapter 6 for a roundup of [20 of the best survey builder apps](#) to use instead.

App	Best for:	Free for:	Plans from:
 Google Forms	free forms	Free	—
 Wufoo	robust reports	Free for 3 forms & 100 entries	\$14.95/mo.
 JotForm	fast form making	Unlimited forms & 100 entries	\$9.95/mo.
 Formstack	professional features	—	\$39/mo.
 Typeform	a new take on forms	unlimited forms with core features	\$20/mo.
 iFormBuilder	mobile forms	10 forms & 100 entries	\$86/mo.
 FormSite	billing features	5 forms & 10 entries	\$24.95/mo.
 123ContactForm	lead generation	5 forms & 100 entries/mo.	\$14.95/mo.
 Formbakery	simple, self-hosted forms	—	\$9/form
 Formdesk	doing more with your database	3 month trial	~\$5/mo.
 FormAssembly	internationalized forms	—	\$28/mo.
 Gravity Forms	advanced WordPress integration	—	\$39 per site
 Formidable	free WordPress forms	unlimited forms with basic features	\$47 per site
 Device Magic	interactive mobile forms	basic features on 1 device	\$10/mo./device
 Cognito Forms	simple payments	standard forms	1% of all sales via form
 FormKeep	hand-coded forms	5 entries at a time	\$7/mo.
 Ninja Forms	customizable form layouts in WordPress	Unlimited basic forms	Extensions from \$19
 PlanSo Forms	simple multi-column forms	Unlimited basic forms	Pro Edition from \$29

## Google Forms

### *for Free Forms*

A screenshot of the Google Forms editor interface. The top navigation bar includes a menu icon, the title "Untitled form", and a "Send form" button. Below the navigation bar is a toolbar with options like "Theme...", "Choose response destination", "Accepting responses", and "View live form". The main editing area is divided into three sections: "Form Settings" with a checkbox for "Show progress bar at the bottom of form pages"; "Page 1 of 1" containing a "Form Description" field, an "Untitled Question" with a radio button for "Option 1", and an "Add item" dropdown; and a "Confirmation Page" section with a text box for the message "Your response has been recorded." and three checkboxes: "Show link to submit another response" (checked), "Publish and show a link to the results of this form to all respondents" (unchecked), and "Allow responders to edit responses after submitting" (unchecked). A "Send form" button is located at the bottom left of the confirmation page.

We all know Google Docs is a great free alternative to Microsoft Office, but did you know it's also a great form tool? Powered by Docs' spreadsheets, [Google Forms](#) are one of the very best form options since they're free and inherently powerful with your form results placed automatically in a spreadsheet. They're also incredibly fast—editing form fields in the Google Form editor is noticeably faster than using almost any other form app.

Google Forms includes all the basic form fields you'd expect—there's no options for payments or uploads, but there are text, multiple choice, drop-down menus, and more—and basic themes to help you get started quickly. Then, you can use the power of a spreadsheet to validate your form entries, add extra features with [scripts](#), and put your form data to work with customized reports and lists, if you don't mind taking the time to put them together with spreadsheet tools. Plus, in another nice option, you can share the form—use Zapier to [set up new entry notifications](#)—and let your team help you edit it just like you can any other Google Doc.

There's so much goodness here for free, it's really hard to argue against choosing Google Docs as your first option for making online forms.

### Google Forms Price: 100% free

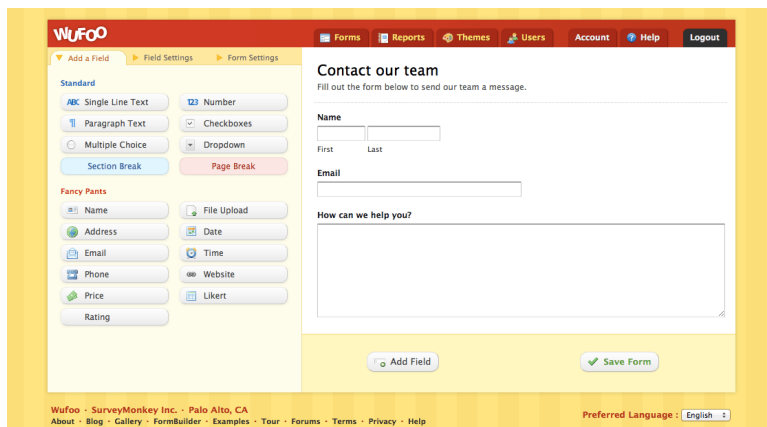
*For a deeper look at Google Docs—including its spreadsheet and form features—see our [Google Docs review](#).*

*See [Google Sheets integrations on Zapier](#)*

It's also worth mentioning that Microsoft's [Office.com](#) free Excel Online lets you make forms. Just open a new spreadsheet, click the **Survey** button in the ribbon toolbar, and add the elements you need. Your survey results will be saved in an .xlsx file that can be synced to your computer with [OneDrive](#), which is a great option if you want to open your results directly in Excel.

## Wufoo

*for Robust Reports*



The screenshot displays the Wufoo form builder interface. At the top, there is a navigation bar with the Wufoo logo and menu items: Forms, Reports, Themes, Users, Account, Help, and Logout. Below the navigation bar, there are three tabs: Add a Field, Field Settings, and Form Settings. The main area is divided into two sections. On the left is the 'Standard' field settings panel, which includes options for 'Single Line Text', 'Paragraph Text', 'Multiple Choice', 'Section Break', 'Number', 'Checkboxes', 'Dropdown', and 'Page Break'. Below this is the 'Fancy Pants' section, which includes options for 'Name', 'Address', 'Email', 'Phone', 'Price', 'Rating', 'File Upload', 'Date', 'Time', 'Website', and 'Likert'. On the right is the form preview area, titled 'Contact our team'. It contains a heading, a sub-heading 'Fill out the form below to send our team a message.', and three input fields: 'Name' (with sub-fields for 'First' and 'Last'), 'Email', and a large text area for 'How can we help you?'. At the bottom of the form preview area are two buttons: 'Add Field' and 'Save Form'. At the very bottom of the page, there is a footer with the text 'Wufoo - SurveyMonkey Inc. - Palo Alto, CA' and a list of links: 'About', 'Blog', 'Gallery', 'FormBuilder', 'Examples', 'Tour', 'Forums', 'Terms', 'Privacy', 'Help'. On the right side of the footer, there is a 'Preferred Language' dropdown menu set to 'English'.



**Wufoo** was one of the first form tools to make online forms look *really* nice, with a form designer that was so slick you'd want to use it. But good looks don't make a great tool on their own, so Wufoo also brought some of the best features to the table, as well. It's got the great form features you'd expect to let you add anything you need to a form, including payment fields from a variety of sources and a file uploader tool that'll let people submit images, documents, and more through your form—use Zapier to [automatically save the files to Dropbox, Box or Google Drive](#). You'll also find over a hundred form templates and themes to help you get started quickly.

Then, once you've got the results you want, Wufoo has an incredibly powerful [report generator](#) that lets you turn your form data into customized charts and more. You can pick a data range of your choice, add the graphs and reports you want, and share the info with your team, without ever having to open a spreadsheet. That alone is a great reason to try it out.

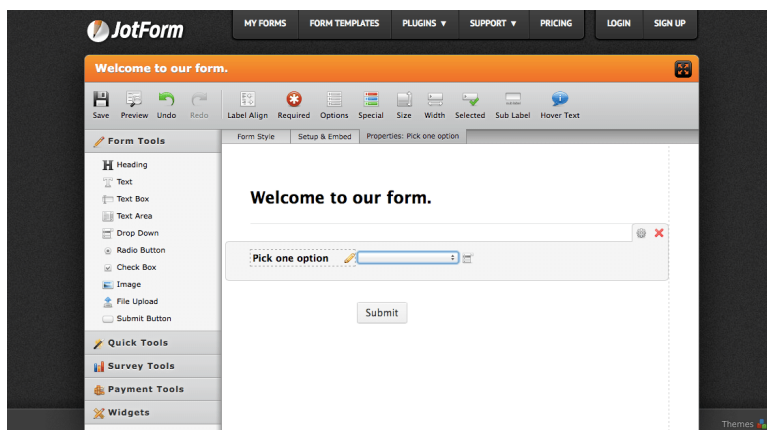
**Wufoo Price:** Free for 3 forms and up to 100 entries per month; [\\$14.95/month](#) for up to 10 forms and 500 entries; [\\$29.95+/month](#) after that

*For a deeper look at Wufoo's features and pricing, check out our [Wufoo review](#).*

*See [Wufoo integrations on Zapier](#)*

## JotForm

*for Fast Form-Making*



If there was a competition for the app that'd let you make a full-featured form the fastest, [JotForm](#) would win hands-down. Just go to [jotform.com](#), and you can *immediately* start making a form without so much as signing up for an account. Add the fields you want, then add your email address to get your form responses, and you can copy the embed code and put the form in your site. That's it.

For anything beyond that, you can sign up for an account and even [integrate it with Zapier](#). You'll find most of the advanced features you'd expect from other form apps in JotForm, in a simple to use interface that's only a bit more dated than the one in the other form apps on this list. And, surprisingly enough, JotForm is one of the better options if you want to sell products through your form, since it supports eight payment processors including PayPal, Stripe, Authorize.net, and more.

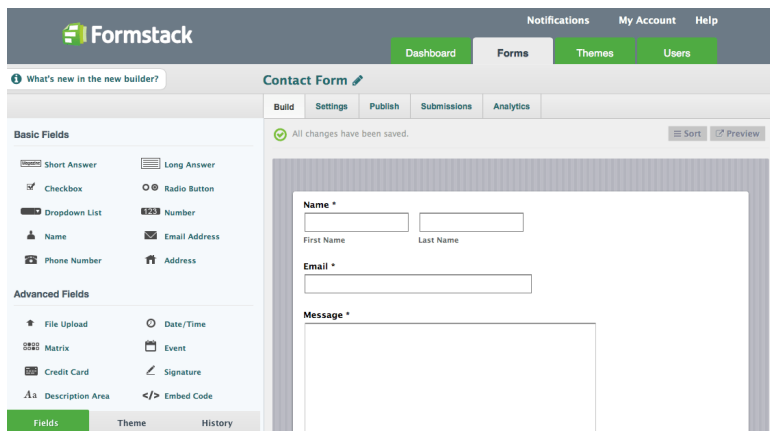
**JotForm Price:** Free for up to 100 entries; [\\$9.95/month](#) for unlimited forms and up to 1,000 entries, [\\$19.95+/month](#) after that

*For a deeper look at JotForm's features and pricing, check out our [JotForm review](#).*

*See [JotForm integrations on Zapier](#)*

## Formstack

*for Professional Features*

The image shows a screenshot of the Formstack web application interface. At the top, there is a dark grey navigation bar with the Formstack logo on the left and links for 'Notifications', 'My Account', and 'Help' on the right. Below this is a secondary navigation bar with tabs for 'Dashboard', 'Forms', 'Themes', and 'Users'. The main content area is titled 'Contact Form' and includes sub-tabs for 'Build', 'Settings', 'Publish', 'Submissions', and 'Analytics'. On the left side, there are two columns of field types: 'Basic Fields' (Short Answer, Long Answer, Checkbox, Radio Button, Dropdown List, Number, Name, Email Address, Phone Number, Address) and 'Advanced Fields' (File Upload, Date/Time, Matrix, Event, Credit Card, Signature, Description Area, Embed Code). The main workspace on the right shows a preview of a contact form with fields for 'Name \*' (split into First Name and Last Name), 'Email \*', and 'Message \*'. A green status message at the top of the workspace says 'All changes have been saved.' At the bottom of the left sidebar, there are buttons for 'Fields', 'Theme', and 'History'.

**Formstack** is perhaps the most professional form option on this list, and is also the most expensive. Far more than just a form, though, you'll find advanced workflow features that let your team members approve or deny form submissions through the app or with a simple email. Formstack also offers smart routing to send specific form responses to particular people on your team—or to custom apps with its many integrations, [including Zapier](#). It also supports file uploads, advanced payment processing with calculations and coupon codes, email encryption, and even digital signatures—all features that make it far more business-ready for core tasks than your average form app.

If every other form app has turned out too basic for your needs, or you're wanting the most secure ways to process business data through forms, Formstack is the app you should check out.

**Formstack Price:** [\\$39/month](#) for up to 20 forms and 2,000 entries; [\\$99+/month](#) after that

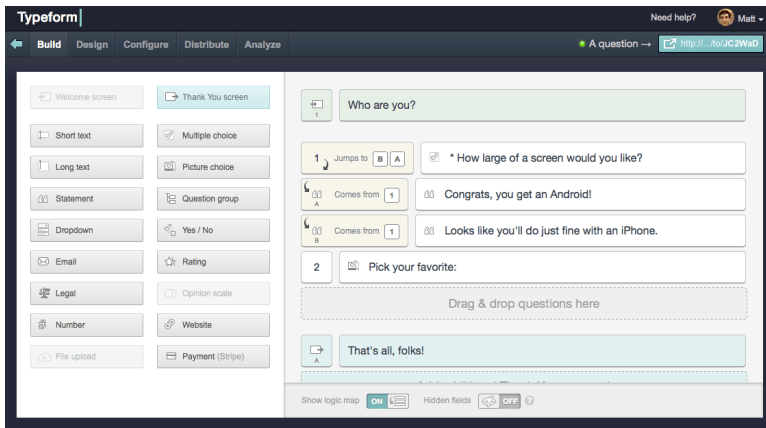
*For a deeper look at Formstack's features and pricing, check out our*

*Formstack review.*

*See Formstack integrations on Zapier*

## Typeform

*for a New Take on Forms*



There are forms, and then there are **Typeforms**. Every other form app shows you the entire form at once, and fills the screen with small text-boxes and bullet points. Typeform throws the convention away and instead only shows you one question at a time in a beautifully modern and mobile-first interface. You'll tap on pictures to select multiple-choice options, and type to sort through drop-down menu options. It's the one form app that's so different, you'll have to [try one of its demos](#) to see how fun it makes forms.

It might not work for every form, but you'll find new ways to use forms with Typeform, since forms can include paragraphs of text and multimedia along with traditional form fields. And when entries starting coming in, you can use Zapier to automatically [add submissions to a Google Docs spreadsheet](#). It's a great option if you

want to use an unconventional form, and if you want your forms to work great on mobile, it's one of the best options.

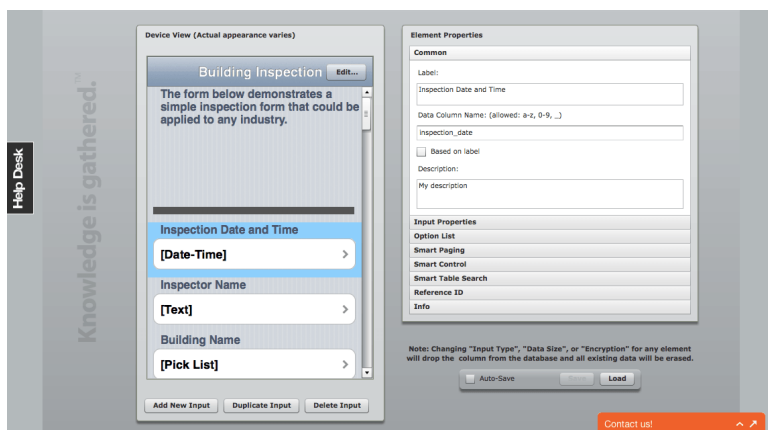
**Typeform Price:** Free with core features; [\\$20/month](#) with pro features (logic jumps, payments, and more)

*For a deeper look at Typeform, including features and pricing, see our [Typeform review](#).*

*See [Typeform integrations](#) on Zapier*

## iFormBuilder

*for Mobile Forms*



Designed as a mobile data collection solution instead of just an online form app, [iFormBuilder](#) forms are made to live inside of mobile apps that you'll then use for on-the-go data collection. The online designer even shows how your form will look on mobile, using native iOS and Android form designs to style your forms. Your team can fill out those forms online or offline, and then sync the results back to the server at a later time, at which point you can [take advantage of app automation with Zapier](#). It's fully HIPAA

compliant, with security features like remote app-level data wipe and complete client and server-side encryption.

Put all that together, and it's a great solution for hands-on forms that your team will use to ensure code compliance in your business, fill out medical and other sensitive forms during work, and anything else you'd need a secure, offline form that'd work great in the hands of your team.

**iFormBuilder Price:** Free for up to 10 forms and 100 entries; [\\$86/month](#) (\$1000/year) for 10 users and 100 forms with unlimited entries; [\\$500+/month](#) after that

*For a deeper look at iFormBuilder, including features and pricing, see our [iFormBuilder review](#).*

*See [iFormBuilder integrations on Zapier](#)*

For more form builder apps that make mobile forms and work offline, you'll find the [10 Best Apps for Remote Data Collection](#) in the next chapter.

## FormSite

*for Billing Features*

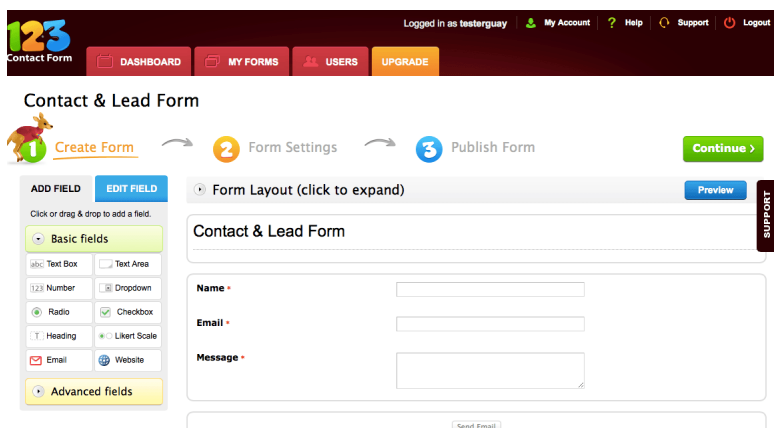
When it comes to selling stuff through a form, [FormSite](#) offers billing features that you won't find in any other form app. In addition to integrating with Paypal and Authorize.net, you can directly accept credit card payments and even let customers pay by cheque. You'll also find that it includes over 40 objects you can include in your forms, including an option to embed parts of a one form into another form. Its workflow features are also something you'll find in few other apps: you can link multiple forms, bring responses from one form to another, and even combine results of your forms to view data together.

Its form builder is a tad more complicated to use than many, but it makes up for that with core features that'll let you do far more advanced things with your forms.

**FormSite Price:** Free for up to 5 forms and 10 entries with ads; [\\$14.95/month](#) for up to 500 entries; [\\$24.95+/month](#) after that

## 123ContactForm

*for Lead Generation*



There are forms for everything imaginable, but most forms end up being a contact form of some fashion. That’s why [123ContactForm](#) is designed to be great for contact forms—albeit contact forms that can also let you sell products, get feedback, and more. Each form in this tool is first and foremost a contact form, so you won’t have to add those elements manually to every form. From that base you can then add any other form elements you’d like. But then, it’s also got the templates you need to create great lead forms, surveys, orders, and even quizzes—everything you’d need from forms beyond just contact forms.

It’s another form app that’s very simple to use, and even integrates with Facebook and Blogger in addition to traditional CMS, so you can embed your form anywhere. Sending submissions anywhere is easy, too, since 123ContactForm is [connected to the hundreds of apps on Zapier](#).

**123ContactForm Price:** Free for up to 5 forms and 100 entries per month; [\\$14.95/month](#) for native third-party app integrations and up to 20 forms and 5,000 submissions, [\\$29.95+/month](#) after that

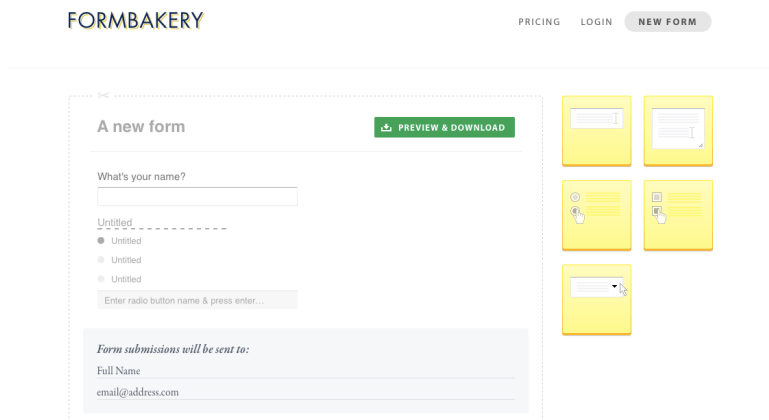
*For a deeper look at 123ContactForm, including features and pricing, see our [123ContactForm review](#).*

*See [123ContactForm integrations on Zapier](#)*



# Formbakery

*for Simple, Self-Hosted Forms*



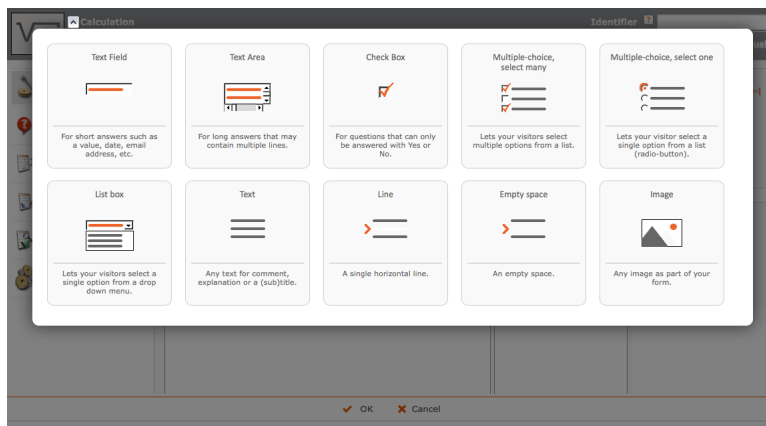
Want *really* simple forms that you can host on your own site, without any website plugins needed? [Formbakery](#) is the app you need, and it's actually even faster to use than JotForm. You'll just drag-and-drop one of five elements into your form—short or long text, bullet or checkmark multiple choice, or a drop-down menu—and add the relevant info, then add your own name and email address at the bottom. Once that's done, you can preview the HTML, PHP, CSS, and JavaScript for your form that's auto generated by Formbakery, then pay \$9 to download the code. You can then embed it in your site and use it forever without paying another dime.

If you want something really simple and self-hosted, it's the app to pick.

**Formbakery Price:** \$9 one-time fee per form

## Formdesk

*for Doing More with Your Database*



Most form apps let you almost forget about the back-end database that's powering your form, but not [Formdesk](#). This European hosted form app lets you use [lookup tables](#) to autofill info in other form fields based on one field. You can autocomplete addresses with just a postal code, simplify country selector lists based on continents, and even lookup info based on what the user has entered in other forms. Along with that, you can import results from other surveys, or turn your form into an offline PDF that you can distribute in paper, then quickly add those entries back to your form's database with barcodes. Users can even come back and edit their form submissions, and you can verify their info via SMS.

Formdesk might not look as slick as other newer form tools, but it has a solid data focus that might be perfect for business use. And you can automatically send that data to your other business apps, too, since [Formdesk is on Zapier](#).

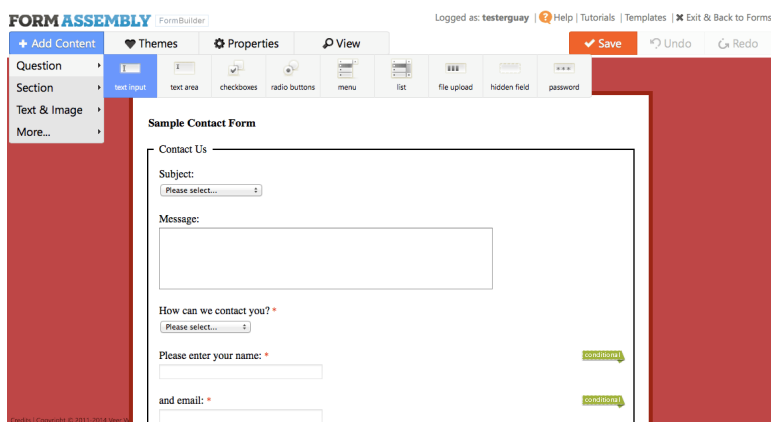
**Formdesk Price:** 3 month free trial; € 49 (~\$65)/year for 250 entries, € 99+ (~\$135+)/year after that

For a deeper look at Formdesk, including features and pricing, see our [Formdesk review](#).

See [Formdesk integrations](#) on Zapier

## FormAssembly

for Internationalized forms



Building forms for an international audience? [FormAssembly](#) has the features you need to build advanced forms, along with support for over [30 languages](#). Your forms themselves can be smarter than most, with form scheduling, calculated fields, and even options to let your users edit their form submissions if needed mean that your forms can work for you without any extra effort.

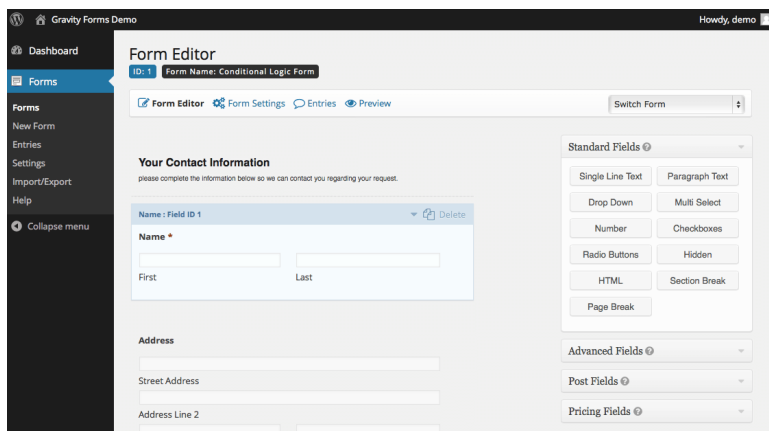
Then, if you want to run a form app on your own servers, but want something more customized than a WordPress plugin, FormAssembly's the app for you, as it has a self-hosted option as well that can run behind your company's firewall.

**FormAssembly Price:** [\\$28/month](#) for basic features; from [\\$59/month](#) for API access and advanced integrations; from [\\$250/mo.](#) to run on

your own server

## Gravity Forms

*for advanced WordPress integration*



There's a good chance you have a WordPress-powered site, as it's increasingly the most popular CMS online for everything from company sites and newspapers to personal blogs and one-page sites. If you're already used to spending your days in WordPress, it'd make the most sense to get a form tool that works great in it. [Gravity Forms](#) is exactly that. It's a form plugin for your WordPress site that includes everything you'd expect from a form app, right inside of WordPress.

Gravity Forms lets you make forms inside your WordPress admin pane with the drag-and-drop simplicity of any other form app, but with more controls than you'd find in most. You can make multiple page forms to keep those long surveys manageable, limit form entries to, say, only let a dozen people enter your giveaway, and even make a form that can generate new WordPress posts. Gravity Forms also connects to Zapier, allowing you to [send submissions](#)

to [Google Docs spreadsheets](#), [Salesforce](#) or [Podio](#). It's a seriously powerful form tool that's a great option if you want tight WordPress integration.

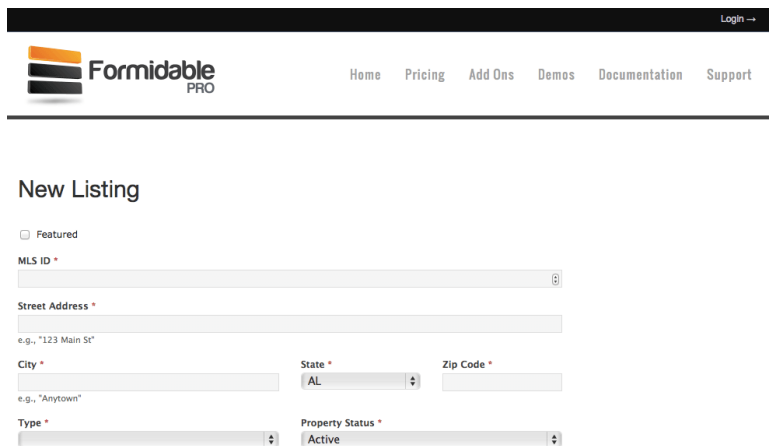
**Gravity Forms Price:** From [\\$39 per site](#), with 1 year of upgrades and support

*For a deeper look at Gravity Forms, including features and pricing, see our [Gravity Forms review](#).*

*See [Gravity Forms integrations](#) on Zapier*

## Formidable

*for free WordPress forms*



The screenshot shows the Formidable PRO WordPress form builder interface. At the top right, there is a 'Login' link. The main navigation bar includes 'Home', 'Pricing', 'Add Ons', 'Demos', 'Documentation', and 'Support'. The Formidable PRO logo is on the left. Below the navigation is a 'New Listing' form with the following fields:

- Featured
- MLS ID \*
- Street Address \*  
e.g., "123 Main St"
- City \*  
e.g., "Anytown"
- State \* (dropdown menu showing 'AL')
- Zip Code \*
- Type \* (dropdown menu)
- Property Status \* (dropdown menu showing 'Active')

WordPress users have another great form app to check out: [Formidable](#). Similar to Gravity Forms, Formidable is a WordPress plugin that lets you make forms right alongside your blog posts and other site content. It offers a free basic version that's great for making most forms, with six standard form elements that you can use for as many forms and responses as you want.

Its paid option, though, is even more interesting, as it adds over a dozen more form field types, along with notifications, custom styling, reports, and more. You'll even find advanced features such as [field calculations](#) that you'd rarely find outside of a spreadsheet-powered form tool. Like Gravity Forms, Formidable [hooks up to Zapier](#), too, allowing you to quickly do more with form submission.

**Formidable Price:** Free with up to 6 form element types; \$47+ for unlimited forms, features, and a year of support.

*For a deeper look at features and pricing, see our [Formidable review](#).*

*See [Formidable integrations on Zapier](#)*

## Device Magic

*for Interactive Forms That Work Anywhere*

The screenshot displays the Device Magic form builder interface. The top navigation bar is blue with the 'Device Magic' logo, the title 'Repair Order', and links for 'Help', 'Tools', and 'Save'. The interface is divided into three main sections:

- Toolbox (drag & drop):** A vertical sidebar on the left containing various form field types such as Free Text, Yes/No, Select, Date, Time, Date + Time, Decimal, Integer, Location, Email, Phone No., Image, Signature, Barcode, and Sketch.
- Form Fields:** A central area showing a list of form elements for the 'Repair Order' form:
  - Repair Order (header)
  - Enter your company's name: (text field)
  - Add a picture of your device: (image field)
  - Add a picture of the broken part: (image field)
  - Which extra maintenance items would you like us to perform? (list field)
  - Enter your email address: (text field)
  - Please sign your name: (text field)
- Field Properties:** A panel on the right for configuring the selected 'Image' field:
  - Label:** Add a picture of the broken part
  - Options:** Extra Large, Camera Only, Show Advanced Settings (checked)
  - Type:** Image
  - Hint:** (empty text box)
  - Identifier:** Add a picture\_of\_the\_broken\_part (with a link to 'use custom identifier')
  - Visible:** Always
  - Required:** Always
  - Read-only:** Never
  - Validation:** (checkboxes for Valid, Invalid, etc.)
  - Generated:** (checkboxes for Time, etc.)

Most form apps are designed around the web, but not [Device Magic](#). It's instead focused on the devices you have with you most—your smartphone and tablets—and lets you make forms specifically designed for them. It includes custom mobile apps for iOS and Android that'll let your users fill out forms from the apps.

You'll design forms online, just as with any other app, but your forms can include features that make most sense on a mobile device including geolocation, uploading an existing image or taking a picture from the form, and even letting users sign their name on your form. Then, once the form's filled out, Device Magic can turn the data into document templates to give you an easy way to make invoices, work orders, and more. It's a great way to make forms that'll help your team get work done on the go.

**Device Magic Price:** [Free](#) for basic features on one device; [\\$10/device/month Standard plan](#) for unlimited forms and basic features; [\\$15/device/month Professional plan](#) for customer branding

*For a deeper look at features and pricing, see our [Device Magic review](#).*

*See [Device Magic integrations on Zapier](#)*

## Cognito Forms

*for Simple, Cost-effective Payments*

The screenshot displays the Cognito Forms builder interface. At the top, there's a navigation bar with 'Build', 'Publish', and 'Entries' tabs. The main workspace shows a form titled 'Basic Sales Form'. On the left, a 'Field Settings - Address' panel is visible, with options for 'Label' (Shipping Address), 'Type' (US selected), 'Help Text', and 'Show/Require This Field' settings. The form itself includes:
 

- Name:** First and Last name fields.
- Shipping Address:** Address Line 1, Address Line 2, City, State (dropdown), and Zip Code fields.
- Email:** Email field.
- Phone:** Phone (US) field.
- My Order:** A section with 'Item 1' containing a 'Product' dropdown and a 'Quantity' integer field. Below it is an 'Item Total' calculated field showing the formula '#Quantity \* Product\_Amount'.

 At the bottom, there are 'Form Settings', 'Payment Settings', and 'Submission Settings' tabs, along with 'Preview' and 'Save' buttons.

Need to collect data from your potential customers, and then sell your products to them? [Cognito Forms](#) just might be what you need—for free. You can make detailed forms, with repeating sections that let you collect as much data as responders want to share. There's calculated fields, file uploads, conditional logic, and more, all to help you make the advanced forms you need.

As surprising as it may be, Cognito offers all of that for free. You can make as many forms as you want and collect up to 500 entries without paying anything. Then, you can add products to your forms and use them to sell your stuff, and Cognito will charge you just 1% of your sales price. That makes it incredibly effective to start out and then scale up the price as you sell more stuff. And, if you used Adobe FormsCentral, Cognito can be a great service to switch to since it can import your older FormsCentral forms.

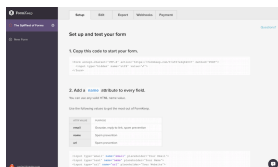
**Cognito Forms Price:** Free for unlimited forms with 500 entries and 1% of sales for forms with payments; from [\\$10/month](#) for 2,000 entries per month

*Currently works with Zapier via Webhooks; full Zapier integration coming soon*



## FormKeep

*for Hand Coded Forms*



Coding your own forms can be incredibly difficult, since you'll have to make sure your form works the same everywhere, build a database to store your info, and make your own ways to integrate your form elsewhere. But, it's the only way to make a form that looks and works *exactly* the way you want—that, or [FormKeep](#). FormKeep is a new form endpoint tool that lets you easily code your own form, but use its backend to manage your data and integrate with Zapier and more.

You'll copy a code snippet and add it to your site, then code in the form elements you want with standard HTML name fields and style the form with your site's existing CSS. FormKeep will do the rest, storing your records on its server where you can easily look through them. Or, you can use its webhooks or Zapier integration to have it send your form data to other apps automatically. It's the perfect middle ground between hand-coded forms and using a pre-made form service.

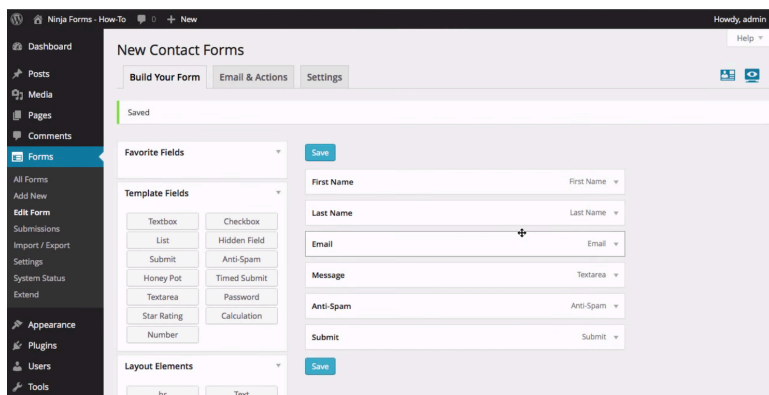
**Formkeep Price:** Free to create forms and see the 5 most recent submissions; [\\$7/month](#) for personal use, \$25/month for commercial use.

*For a deeper look at features and pricing, see our [FormKeep review](#).*

*See [Formkeep integrations](#) on Zapier*

## Ninja Forms

*for Customizable form layouts in WordPress*



For WordPress forms that are more customizable, [Ninja Forms](#) is a great option to consider. It's a free form plugin with paid extensions that let you add integrations with popular apps, add customized notifications, and more. There are even extensions that let you tweak your form layout, to make multi-page forms or forms with multi-column layouts. You can then customize forms deeply with CSS themes.

You can use your forms to do more with Ninja Forms, too, with its front-end posting tool. Instead of just letting you create posts from forms, it lets you integrate your forms deeply into your site to customize pages and posts without opening WordPress admin. It's a great choice if you want to deeply integrate forms into your WordPress site.

**Ninja Forms Price:** Free for unlimited basic forms; add-on [extensions](#) from \$19 each

*For a deeper look at features and pricing, see our [Ninja Forms review](#).*

*See [Ninja Forms integrations on Zapier](#)*

## PlanSo Forms

*for simple multi-column forms*

The screenshot displays the PlanSo Forms interface. On the left, a form is being built with the following fields: 'First name' and 'Last name' (text inputs), 'Email' (text input), 'Mobile phone' (text input), 'Profile Picture' (file upload with 'Choose File' button and 'no file selected' text), and 'Your Message:' (text area). On the right, a sidebar titled 'Predefined fields' lists various field types: Name, First name, Last name, Email, Mobile phone, Phone, Submit button, Text, Multiline text, Number, Date and time fields (Date, Time, Date and time), Select fields (Select, Multiselect, Radio), Checkbox, Special fields (Single file, Multiple files, Url), HTML Tags (HTML Code, Horizontal Divider, H1 Headline, Paragraph), and a green 'Save form and continue' button at the bottom.

Most form apps make it simple to drag-and-drop in the form elements you want, as long as you want each form element listed one after another. Making a multi-column form is often much more difficult, so that's what [PlanSo Forms](#) focused on simplifying. Just drag the form elements you want side-by-side, and they'll organize into a perfect multi-column layout automatically.

You can make forms directly from PlanSo Forms' website without signing up for an account, then once you're done you can make an account and embed the form into your website. Or, you can install its WordPress plugin to create forms directly from your WordPress-powered site just as easily. And, with a Pro upgrade, you can make purchase forms with PayPal or WordPress account signup forms, along with more advanced forms that include conditional logic and more.

**PlanSo Forms Price:** Free for unlimited basic forms; [Pro Edition](#) from \$29 for support, PayPal integration, conditional logic and more.

*For a deeper look at features and pricing, see our [PlanSo Forms review](#).*

*See [PlanSo Forms integrations on Zapier](#)*

## Picking the Best Form App

With all the form builder apps here, and more that [work with Zapier](#), it's rather hard to pick the *perfect* form app. Each app we've included has its own attractive features, they all work great, and will all let you make a wide variety of forms with ease. If one of their unique features stuck out to you, give that one a try and see if it works well for your needs.

Otherwise, it's hard *not* to recommend [Google Docs](#)' built-in form tool. For the majority of use cases, Google Docs Forms has the tools you'd need, for free, and it makes it easier to do more with your form results by default just by being a spreadsheet app. With almost every other form app, the first thing you'll want to do is [send your entries to a Google Docs spreadsheet](#) via Zapier—but here, that's already done by default. Google Docs Forms is the first form app you should try out.

For more features than that, [Wufoo](#)'s a great option for awesome reports, and [JotForm](#) is great for an easy to use form tool. [Typeform](#)'s great if you want mobile-ready forms that look beautiful, while [iFormBuilder](#) and [Device Magic](#)'s mobile apps make them great for hands-on data collection. [Formstack](#) and [Formsite](#)'s business features make them appealing, while [Cognito](#) is great if you want a cheap way to sell stuff. [Formdesk](#) is a good option if you want to work with PDF forms, or want to add results to your form response database later.

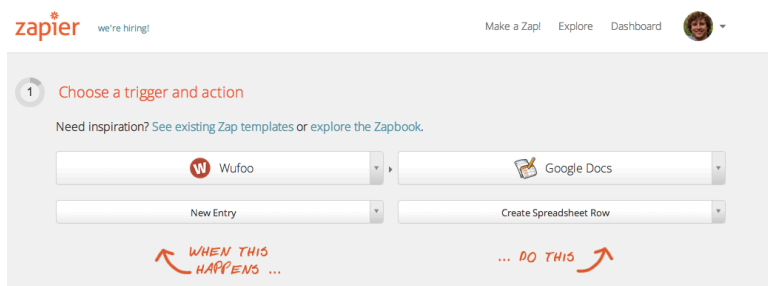
If you love to have your forms on your own site, without needing another app, [Gravity Forms](#), [Formidable](#), [PlanSo Forms](#) and [Ninja Forms](#) are great for WordPress sites, [123ContactForm](#) is great for

other CMS, and [Formbakery](#) and [FormAssembly](#) are great for any other site. Or, if you'd rather hand-code your form—or want a pay-what-you-want solution—[FormKeep](#) is a great new option to consider.

It can be tough to pick between all the options, but don't fret: all of these options work great, and they'll all let you make forms and put your form results to work. That's what's really important.

## Putting Your Form to Work

Once you've got a form app and have put together the questions you need in your form, there's one more thing to think about before releasing your form into the wild: putting your form results to work. You could just wait for all of your entries to come in, then download the results spreadsheet and analyze the data, but the potential of making your own “apps” of sorts from forms is only realized when you let the data work for you by default.



That's where Zapier comes in. With a few Zaps, you can get your form data doing a lot for you. Here are some quick ideas of ways to use Zapier with your form, each take just a few clicks to set up and don't require technical skills of any kind.

## Save Your Results

There's no need to export your form data manually. Zapier can automatically add every one of your form entries to a spreadsheet or document of your choice. Just add your form to Zapier and have it append a Google Docs spreadsheet or Evernote note. You could even have it save your results to multiple apps if you want, with extra Zaps.

### Zaps:

- [Save new Typeform entries to a Google Sheets spreadsheet](#)
- [Save Device Magic Forms to Evernote](#)

## Stay in Touch

Collecting contact info in your form? Zapier can send that info to your address book, such as Google Contacts or a CRM, and your mailing list, too. You'll not only have the individual's contact details saved, but that respondent will be signed up to get your next newsletter, too.

### Zaps:

- [Add new Google Contacts from JotForm form submissions](#)
- [Send emails for new FormKeep submissions](#)
- [Send Gravity Form leads to MailChimp](#)

## Send More Info

Or, perhaps it's an email right now that's needed. With Zapier and an email service like Mandrill or Mailgun, you can send an email directly to people when they fill out your form, complete with any extra info you'd like to share with them.

### Zaps:

- [Send an email from Mandrill when your Formstack form is filled out](#)
- [Create new cases in Desk from Postmark inbound emails](#)
- [Send email notifications or follow-ups from new Typeform entries](#)

## Save Your Files

If you're using Wufoo or Formstack and are accepting file uploads on your form, you can integrate them with your Dropbox account to upload your files automatically. Then, with Zapier, you can get notified whenever any new files are added to that folder, or put the files to work in any other app you want.

Zaps:

- [Add new Wufoo file uploads to Dropbox](#)
- [Save Formstack form attachments to Box](#)
- [Create text files in Dropbox from Ninja Forms form submissions](#)

## Generate PDF and Word Documents

If you need to turn your form submissions into a nice-looking document, such as a contract or application, connect a form builder to [WebMerge](#) via Zapier. With this integration, information collected in your online forms will be automatically sent to WebMerge and generate a PDF, Word document, Excel spreadsheet or PowerPoint presentation.

Zaps:

- [Create Personalized Documents from Gravity Forms with WebMerge](#)

- [Create Personalized Documents from JotForm with Web-Merge](#)

## Assign a Task

When you have a form result that requires more action, you'd better make sure you don't forget to followup on it. Zapier can integrate with your project management or to-do app and add new tasks anytime a form is filled out, complete with data from your form so you won't have to go look up the info again when it's time to work.

### Zaps:

- [Create Trello Cards from Wufoo Form Entries](#)
- [Create tasks in Asana from Ninja Forms form submissions](#)
- [Create Basecamp projects from FormKeep submissions](#)

## Send a Lead to Sales

If your form is for gathering inbound leads, automatically add those new contacts to your CRM as a lead. This ensures your sales team receives the new leads and can act on them right away.

### Zaps:

- [Create Salesforce Leads via Gravity Forms](#)
- [Save JotForm Leads to SugarCRM](#)
- [Create Relationships in RelateIQ from Wufoo Form Submissions](#)



## Notify Everyone

Some forms are more special than others, and when those special forms are filled out, you'll want to know. Zapier's great for notifications, since it can send you an email or push notification, or even let your entire [team chat room](#) know that there's a new submission.

### Zaps:

- [Get Slack notifications for new Ninja Forms form submissions](#)
- [Send me an SMS when my Device Magic Form is Filled Out](#)
- [Get a Hipchat Notification When Your Typeform Form is Filled Out](#)

## Act on Certain Responses

Sometimes you only need to learn about the form respondents who replied “yes” to certain answer. For those times, use Zapier filters to scope down when an automation is triggered.

The screenshot shows the Zapier filter configuration interface for Wufoo triggers. At the top, it says "Filter Wufoo triggers". Below that, it says "Only trigger a 'New Entry' from Wufoo when...". There is a section for "Form (required)" with a dropdown menu set to "Contact Form". Below that, it says "Add filters based on other Wufoo fields to only allow some items." and "Custom Filters". There is a filter rule: "1 Field5 (Text) Contains yes". There are buttons for "+ Add AND Filter" and "+ Add OR Filter".

For example, if they replied “yes” to the question, “Would you like a follow up phone call?” Have those “yes” submissions sent directly to your phone, either as a text message or push notification.



















- **Zap:** [Get an SMS alert from a new Wufoo form entry.](#)

Those are only a few of the ways your forms can work for you, automatically. With a great form and integrations with the [apps you already use](#), you can collect the info you need and save yourself the busywork of having to copy and paste the entries to the right place.

## Bonus: Download a Form App Cheat Sheet

### \* Zapier's Form App Cheat Sheet

#### The Best Form Apps

Name	Best for:	Free for:	Paid Plans from:
 Google Forms	free forms with Google Sheets integration	100% free	—
 Wufoo	robust reports	3 forms, 100 entries	\$14.95/mo.
 JotForm	fast form making without an account	100 entries per form	\$9.95/mo.
 Formstack	professional features & advanced security	—	\$39/mo.
 Typeform	a modern take on forms	Unlimited with basic features	\$20/mo.
 iFormBuilder	mobile, HIPAA-compliant forms	10 forms; 100 entries	\$83/mo.
 FormSite	billing features and signatures	5 forms, 10 entries	\$14.95/mo.
 123ContactForm	easy-to-build forms for lead generation	5 forms, 100 entries	\$14.95/mo.
 FormBakery	simple, self-hosted forms	—	\$9 per form
 Formdesk	doing more with your database	3 month trial	\$5/mo.
 FormAssembly	internationalized forms	—	\$28/mo.
 Gravity Forms	advanced WordPress integration	—	\$39 per site
 Formidable	free WordPress forms	Unlimited basic forms	\$47 per site
 Device Magic	interactive mobile forms in apps	1 device, basic features	\$10/mo/device
 Cognito Forms	simple payments	Unlimited, 500 entries	\$10/mo.
 FormKeep	hand-coded forms	5 entries at a time	\$7 per form
 Ninja Forms	customizable form layouts in WordPress	Unlimited basic forms	Extensions from \$19
 PlanSo Forms	simple multi-column forms	Unlimited basic forms	Pro Edition from \$29

For more info on form builder apps and ways to integrate them into your workflow, check out the full article on the Zapier blog:

[The Best Online Form Builders for Every Task](#)

Need an easy way to reference the best form apps in this roundup? We've made a PDF cheat sheet that includes each of the form apps in this roundup, complete with their best features and pricing, to give you an easy way to compare the form builders and find the best for your team. To download it, go to the Zapier landing page for [The Ultimate Guide to Forms and Surveys](#), and you can download the cheat sheet along with ePub and PDF copies of this entire eBook—or if you already downloaded this book there, you'll find the cheat sheets in the *Cheat Sheet* folder of your download.

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The apps in this chapter are a great option if you want to collect data on your website, but what about the times when you need to replace paper forms with a mobile form that can work anywhere—even without an internet connection? In chapter 3, you'll find [10 great apps for building mobile forms](#) that can work on your favorite mobile devices.

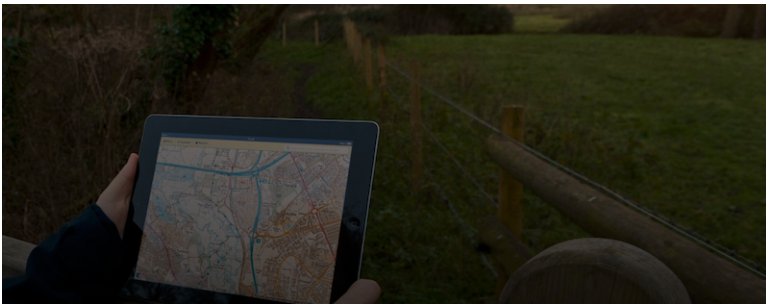
Or, if you'd rather get started building a form with one of the apps in this roundup, go ahead and jump to chapter 4, which dives into some of [the most powerful form features](#) you should use in your form. Be sure to read it before building your next form.

Looking for other great apps for your team? Check out our roundup of [“The Best Team Chat App for Your Company”](#).

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*Written by Zapier Marketer [Matthew Guay](#).*

# Chapter 3: Remote Data Collection: The Best Apps for Gathering Data in the Field



There are dozens of [great form builders](#) and [survey tools](#) that you can use to add a new contact form to your website, build an event registration form, or design a customer satisfaction survey.

But what if you're trying to replace the paper forms in a doctor's office, collect data at a trade show, or track your expenses for a repair job?

You'll need a tool designed specifically for data collection, so your team members can enter data like pictures, barcodes and signatures on the go.

The 10 apps in this chapter have been built to help you do just that. You'll be able to collect data on a mobile device, even if you're offline. You'll also be able to use [Zapier](#) to [integrate many of the tools](#) into your workflow, automating what used to be time-consuming data entry.

## Replacing Paper and Clipboards



Most apps are just shiny new wrappers on age-old concepts. Email is a faster, cheaper letter. E-commerce is the world's largest shopping mall. A CRM is a digital Rolodex.

The same is true of digital forms; especially mobile data collection forms. For years teams have gathered info on paper and clipboards, then catalogued the data once they get back to the office. It works, but it's inefficient.

The Three Rivers Park District in Plymouth, Minnesota, for instance, would gather information on the health of trees in their nursery using pre-printed tags, paper, and pencil. With thousands of trees to log, there could often be a three-month backlog of data to be catalogued.

A mobile data collection form, built using [iFormBuilder](#), proved to be the solution they needed. "The process is now entirely paperless, and the nursery manager can see an almost real-time count of his inventory," says senior manager Simon Morgan. The new forms let

field techs gather data, and the field manager can see it in real time in the office.

Three Rivers has extended their use of mobile forms to other projects, too. Their next goal is to modernize ski trail condition reporting, which currently involves a paper form that's faxed back to the office.

Going paperless in the office is an easy transition—with everyone using a computer, you can simply depend on online forms. Going paperless in the field, however, can appear to be an equally daunting task. If you do move away from paper, though, you can modernize your entire team's workflow, helping everyone get more done and saving data entry headaches. It may be even more fulfilling than taking your office paperless.

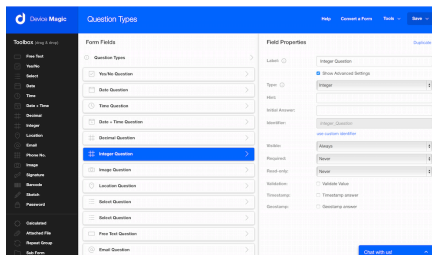
What you'll need to make it happen is a data collection app—a tool that lets your team fill out forms offline on their smartphones and tablets. These apps are super-powered forms that let you capture images, photos, videos and more, sign forms with a finger, track locations on maps, and much more. They're flexible tools that can help you gather more information and work faster, without having to worry about a wifi signal.

Here are 10 of the best apps for just that.

App	Best for:	Free for:	Plans from:
 Device Magic	pre-filled data in forms	Basic features on 1 device	\$10/mo. per device
 GoFormz	digitizing paper forms	1 form on 1 device	\$10/mo. per device
 Nexticy	paper-style forms on iPad	3 forms & 50 responses	\$9.99/mo. per device
 QuickTapSurvey	questions and surveys	1 form & 50 entries	\$19/mo. per device
 Fulcrum	geolocation with custom maps	—	\$29/mo. per user
 Formitize	accepting payments in mobile forms	—	\$29.99/mo. per device
 iFormBuilder	adding data to your database from anywhere	10 forms & 100 records	\$83/mo.
 PushForms	turning paper forms into mobile apps	—	\$99/mo.
 Formhub	open source data collection	100% free	—
 TrackVia	building powerful apps that work anywhere	—	\$199/mo.

## Device Magic (iPhone, iPad, Android)

*for pre-filled data in forms*



Typing on your phone can be slow, prone to mistakes, and nearly impossible if you're also trying to juggle other tasks. **Device Magic's** forms make sure your team doesn't have to type any more than

absolutely necessary. You can create forms, push them to your team's devices while they're working, and pre-fill the forms with information you already know.

A repair job form, for example, could be prefilled with the location address, repair description, parts needed, and price estimate, and the team member will only need to fill out the final details about the actual work they did.

Adding that work information is easy, too. Capture an image in a Device Magic form, and you can add quick annotations and sketched diagrams, then send them along with the rest of the form data. You won't even need to capture location data, since Device Magic automatically logs where the form was filled out.

**Device Magic Pricing:** Free for basic features on one device; from \$10/month per device [Standard plan](#) for more features and unlimited forms

*For a deeper look at Device Magic's features and pricing, check out our [Device Magic review](#).*

*See [Device Magic integrations](#) on Zapier*

## **GoFormz (iPhone, iPad, Android)**

*for digitizing paper forms*





Does your team currently rely on a paper form? If so, [GoFormz](#) lets you continue using the exact same forms inside its app, simplifying data collection without your team having to learn anything new. Just upload a PDF of your form to GoFormz, then you can add fields that'll match what you need to capture. Add text fields to normal text boxes, perhaps, and put a date field in the date box so you can easily pick today's date.

GoFormz can then make your forms smarter, too. If you had a paper form with a spot to tape or glue on a photo—perhaps for a license or membership application form—GoFormz could let you tap that photo field, capture a photo from your tablet and have it show up in the original form's template. You can even store data on your server, pre-fill form fields, and include spreadsheet-like fields where you can list expenses and calculate the total sale price—or any other sums—automatically. And once you're done, you can export the filled form as a PDF to give your clients a printed work order or invoice. GoFormz saves the data to its server, too, so you can analyze the data back in the office.

**GoFormz Pricing:** Free for one form and one user; from \$10/month per user [Professional plan](#) for unlimited templates, 1GB online storage, and more

## Nexticy (iPad)

*for paper-style forms on iPad*

The screenshot shows the Nexticy iPad app interface. At the top, there's a status bar with 'iPad', signal strength, '5:34 PM', 'Invoice', and battery level '91%'. Below the status bar is a navigation bar with icons for back, list, settings, and help. The main content area displays an invoice form. On the left, there's a placeholder for a company logo with the text 'Place for image'. To its right is a form for 'Your Company Name' with fields for 'Street Address', 'City, ST, ZIP code', 'Phone Number', 'Web site', and 'etc.'. On the right side, there's a large 'INVOICE' header and two fields: 'Date: Place for date' and 'Number: Type number'. Below these are two columns for 'Bill To:' and 'Ship To:', each with fields for 'Street Address', 'City, ST, ZIP code', 'Phone Number', 'Web site', and 'etc.'. Underneath is a table with columns: 'P.O.#', 'Sales Rep.', 'Ship Date', 'Ship Via', 'Terms', and 'Due Date'. The 'Ship Date' and 'Due Date' fields contain 'Place for date'. At the bottom is a table with columns: 'Product ID', 'Description', 'Quantity', 'Unit Price', and 'Line Total'. The 'Line Total' column shows '0' for five rows, each with a small icon to its right.

If your team's already accustomed to paper forms, using a mobile app might feel a bit strange at first. You can fill out paper forms in any order, and arrange questions in columns with formatting, things that often aren't available in digital forms. Nexticy, though, gives you the feeling of paper forms, along with the advantages of digital forms.

With Nexticy's iPad app, you can drag-and-drop elements into the order you want. Or, you can import pre-made forms from Nexticy's [FormBox](#) template site. Then, you can share them to other iPads to let your team gather data together. It's a simpler way to get paper-like mobile forms, without complicated sharing tools.

**Nexticy Pricing:** Free for 3 forms and 50 responses; from \$9.99/month [Standard account](#) for 10 forms and 500 responses

*For a deeper look at Nexticy's features and pricing, check out our [Nexticy review](#).*

*See [Nexticy integrations on Zapier](#)*

## QuickTapSurvey (iPhone, iPad, Android)

*for questions and surveys*

The screenshot shows the 'Add Question' screen in the QuickTapSurvey app. At the top, there's a blue navigation bar with the logo and links for 'Dashboard', 'Surveys', 'Upgrade', and 'Help'. Below this, the breadcrumb trail reads 'Surveys > Edit Multi-Screen Survey > Add Question'. The main heading is 'Add Question'. The form includes a 'Question Type' dropdown menu currently set to 'Multiple Choice - Single Answer'. Below that is a text input field for the 'Question / Title' containing the text 'What's your favorite type of food?'. To the right of this field are 'T' and 'TT' icons. There is a checkbox for 'Is Question Mandatory?' which is currently unchecked. Below that is another dropdown menu for 'Add Question' set to 'To The Beginning'. The 'Possible Answers (one per line)' section is a text area containing the following list: American, Chinese, Thai, Korean, Mexican. At the bottom, there is a checkbox for 'Include "Other" with text input' which is also unchecked. At the very bottom, there are three buttons: 'Back', 'Save Question', and 'Save & Add Next Question'.

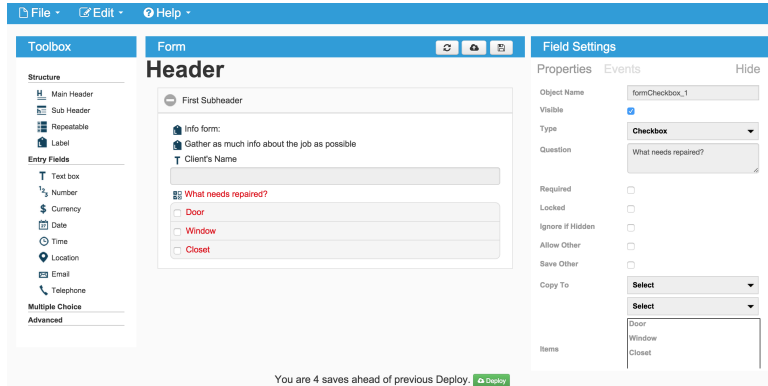
Is your form filled multiple choice and yes/no options? Then [QuickTapSurvey](#) might be the right tool for you. It's designed for rapidly building mobile surveys with multiple choice questions.

If you need more advanced fields, you'll find them in QuickTap-Survey, as well. These forms capture signatures, photos, and QR codes—perfect for on-site jobs such as inspections, door-to-door surveys, and other data collection with surveys. And since it can import SurveyMonkey forms, it's a great way to take your online forms with you anywhere.

**QuickTapSurvey Pricing:** Free for one survey on one device with 50 entries; \$19/month [Basic plan](#) for one device with unlimited surveys and responses

## Formitize (iPhone, iPad, Android)

*for accepting payments in mobile forms*



If you're making forms to help complete on-site jobs, you likely need to bill your customers for your work and time. **Formitize** is a form builder that lets you save one step in the process, since it can accept credit card payments right inside your mobile form. It can calculate the total service price based on the items you entered in the form fields—time spent on the job, parts, tax and more—and then let your customer pay, finally sending them a receipt via email.

Formitize also helps you keep track of team data. It offers a built-in resources library, so team members have company documentation and guides handy. You can also tag photos you've captured in a form, making them easier to find later and helping your team build a photo library to document their work.

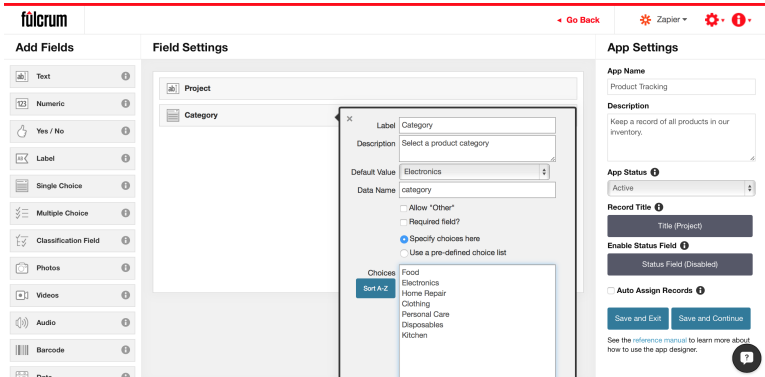
**Formitize Pricing:** \$29.99/month per user for unlimited forms and features

*For a deeper look at Formitize's features and pricing, check out our [Formitize review](#).*

*See [Formitize integrations](#) on Zapier*

## Fulcrum (iPhone, iPad, Android)

*for geolocation with custom maps*



Location matters. [Fulcrum](#) makes sure you can identify any location you need in your forms with custom maps. It includes maps from Mapbox, MapQuest, and OpenStreetMap, and you can upload your own maps or get Fulcrum to create a map from your own data. You can also plot your form entries on maps that contain the data you need—something especially important for remote data collection.

Then, if you need to share your data, Fulcrum lets you build template documents that pull data from your forms and export it as a PDF right from your phone. That lets you make, for example, an invoice template that your team can use to generate PDF invoices just by filling out the form. Or, you can export collected data back at the office in GIS format to use in professional mapping apps, or save it in CSV format to use in your spreadsheet app.

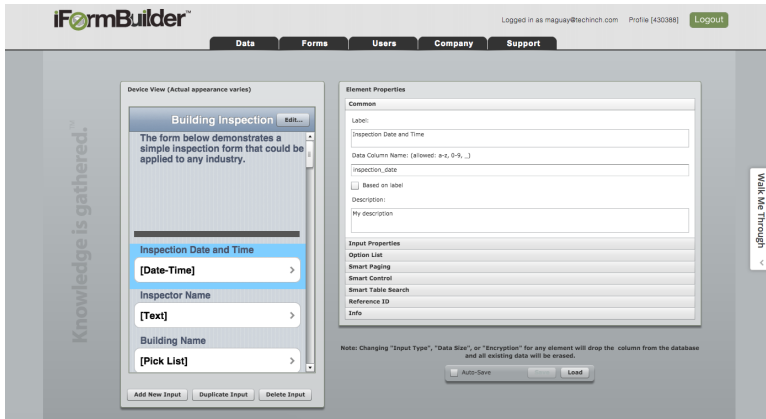
**Fulcrum Pricing:** From \$29/month [Mini plan](#) for one user and basic features

\*For a deeper look at Fulcrum's features and pricing, check out our [Fulcrum review](#).

See [Fulcrum integrations on Zapier](#)

## iFormBuilder (iPhone, iPad, Android)

*for adding data to your database from anywhere*



iFormBuilder lets you track all of your data in one database. You can import your old data, use integrations to add data from spreadsheets and other apps, and store it alongside the data you're collecting in your forms. That way, you can track everything you've gathered in paper forms along with your new digital form records.

Then, you can make more powerful forms by pre-filling form fields from your database. You could, perhaps, enter a client's name in a form, and iFormBuilder can then pull their address and other contact info from your database, so you won't have to re-type their phone number and email each time you fill out the form. Your team can then work together on your tasks, assigning forms to each other—perhaps with part of the info already filled—and acknowledge when they're able to start work on a task. All that, just from the same forms they'll use to log their work in progress.

**iFormBuilder Pricing:** Free for up to 10 forms, 50 users, and 100 records per form; from \$83/month [Starter plan](#) for up to 100 forms, 10 users, and unlimited records

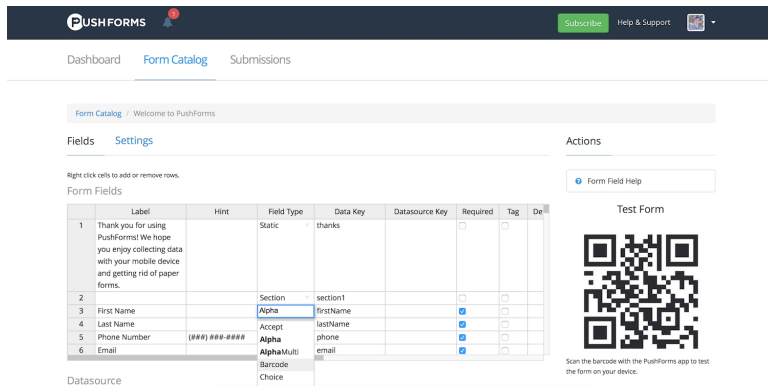
*For a deeper look at iFormBuilder's features and pricing, check out*

*our iFormBuilder review.*

*See iFormBuilder integrations on Zapier*

## PushForms (iPhone, iPad, Android)

*for turning paper forms into mobile apps*



Want a quick way to turn your old paper forms into sleek modern forms that are easy to fill out anywhere? [PushForms](#) is ready to upgrade your forms for you. Make a new account and the second step you'll be asked to complete is to send an email to their team with a copy of your PDF form. PushForms then turns the form into a smart, mobile form that your team can immediately use to start collecting data. All your team will need to do is download the PushForms app and scan a QR code, and they can start sending data—no accounts or authorizations needed.

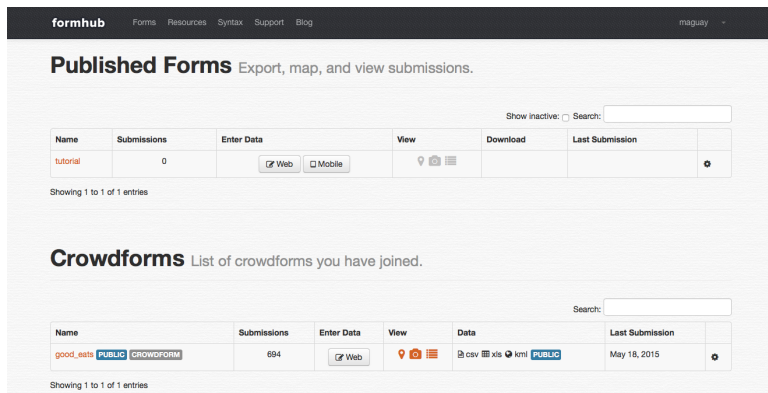
If you want to do more with your form, just dive into PushForms' online editor, where you'll see a spreadsheet-like interface that lists your form fields, data types, and answer options. It's a quicker way to put together a form, since you won't have any visual clutter, and you can pick from a [wide range of fields](#) to capture barcodes, NFC data, video, documents from other apps, and more.

**PushForms Pricing:** From \$99/month [Basic plan](#) for 50 forms, 3,000 submissions, and unlimited users

*PushForms Zapier integration coming soon*

## Formhub (Android, Web)

*for open source data collection*



Looking for a way to build mobile forms that store data on your own servers and let you extend and tweak their code as much as you want? [Formhub](#), a project from the [Modi Research Group](#) at Columbia University, is the tool for you. It has a much steeper learning curve, but if you're willing to put the time and effort in, it can be much more powerful than most mobile form apps.

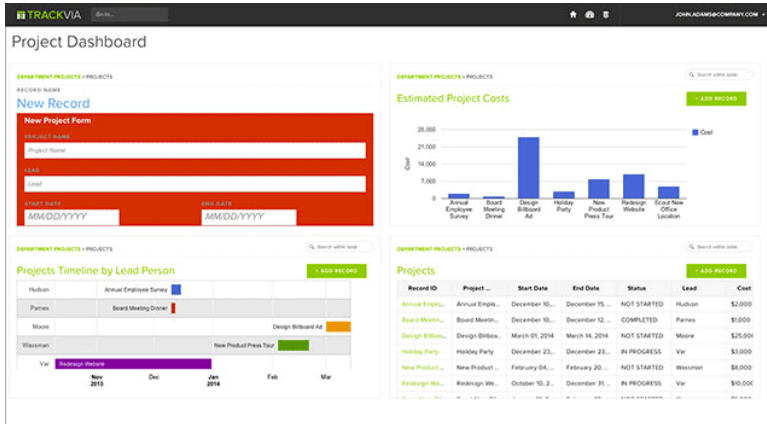
There's no form builder, so instead you'll use a spreadsheet to list your form fields using the [XLSform](#) syntax. Once that's done, upload your spreadsheet and your team can fill it out online or with the free [ODK Collect](#) app for Android, which works offline and lets you add photos, GPS locations, and more to your forms. Back on your server or in Formhub's app, you can manage your form entries, and even plot them on a map in Google Earth.

**Formhub Pricing:** Free, with [open source](#) to run on your own server



## TrackVia (iPhone, iPad, Android)

*for building powerful apps that work anywhere*



When you first decided to move away from paper forms, you probably considered building your own app. That'd be one option—a pricey, time-consuming option that's likely not what you really need. Instead, a [database app builder](#) like [TrackVia](#) can give you 90% of the features of a custom app, with less than a tenth of the effort. And, with TrackVia's mobile app, you'll still have a great tool for gathering data on the go.

You're able to put together the features you need to manage your customers, products, assets, projects and more online. Then you can make forms to send to TrackVia's mobile apps so your team can gather data, attach files from other mobile apps, and include images. It even supports barcodes, so your team can scan a code that looks up a product in your database and pre-fills the form with most of the data automatically. It's a more powerful alternative to the simpler form tools—though, unfortunately, it doesn't work offline like the other tools.

**TrackVia Pricing:** From \$199/month [Pro plan](#) for basic features with up to 10 users and 250,000 records

*For a deeper look at TrackVia's features and pricing, check out our [TrackVia review](#).*

*See [TrackVia integrations](#) on Zapier*

Need more advanced features that database builders like TrackVia offer? Chapter 9 includes similar apps in our roundup of [the best tools to build your own simple app](#).

## Fit Mobile Forms Into Your Workflow

Collecting data is only one part of the puzzle. Now that your new forms are available in the office as your team's devices are online, you can do a lot more with the data your team's collected.

Using an integration tool like [Zapier](#), or your form app's own integrations, you can get custom notifications when forms are filled out, save data to your team's database or spreadsheet, update your mailing list, and much more.

### Save Data Where You Want

Now that your team's collecting data efficiently, you'll need a place to store everything, analyze it, and use it to help in your work. For that, you'll likely want to use a database or spreadsheet, perhaps with special queries, pivot tables, or visualizations to make sense of your data.

The Three Rivers Park District, for instance, was already storing their data from paper forms in a database. When they moved to an iFormBuilder-powered form, all they had to do was connect their new form to the existing database and everything worked as normal—just faster.

Whether your team's storing info in a database, spreadsheet, or even a notebook, you can save new field data automatically with integrations like these.

**Zaps:**

- [Save iFormBuilder Entries to a MySQL Database](#)
- [Add iFormBuilder form entries to a Google Docs spreadsheet](#)
- [Save Device Magic Forms to Evernote](#)

Or, if you'd rather use your form app's database as the main place to store your data—something that might be a great choice if you use a database builder tool to make your form—then you can use a Zapier integration to send entries from other sources to your form database.

The [Efficient Foundations](#) team, an IT firm that helps companies manage their data, uses this trick to send data from a Google Sheets spreadsheet to their own iFormBuilder form's database. Having so much data in one place has helped their team work more efficiently, with pre-filled form fields cutting down on typing mistakes.

“We are no longer reliant on correct spelling or people not completing all fields,” says Efficient Foundations director Sven Scheepers. “Field users can simply select a site name and it will automatically populate the other fields. This makes reporting far more accurate and allows more informed business decisions to be made, saving companies a lot of time and money.”

**Zaps:**

- [Send Google Docs Spreadsheet data to iFormBuilder database](#)
- [Save Wufoo form entries to TrackVia database](#)

## Log Your Work

Mobile forms are designed to be used while working, so you likely need to bill for your time and perhaps even send invoices to your customers when the work is done. Your form can handle that automatically if you connect it to your time tracking or invoice app. Instead of having to remember to start your time tracking app when you begin a job, have your form log the job start and finish time and send it to your time tracker. It can then add your client to your billing app, and send them an invoice as soon as you've submitted the form.

### Zaps:

- [Create new FreshBooks clients from TrackVia entries](#)
- [Create a timesheet entry in a Harvest project when a new Fulcrum record is created](#)
- [Create New QuickBooks Online Customers From Your Device Magic Form](#)

If you're using a CRM app to track data about your customers and suppliers, you can use your form to update each contact's entry as you fill out the form. Then, if you're talking with a new potential customer, you can use the form to make a new contact entry in your CRM automatically.

### Zaps:

- [Add Salesforce custom object from iFormBuilder entries](#)
- [Add Contact to Call Loop When They Fill Out Device Magic Form](#)
- [Add TrackVia database entries as new HubSpot contacts](#)

## Schedule Appointments

Not able to finish the whole job today? Or want a form that allows your team to inspect the entry before scheduling a project? Then you'll want an easy way to schedule an appointment from your form. All you need to do is connect your form to Google Calendar, or the calendar tool of your choice, and have it automatically create an appointment when the form is filled out.

You could even include a field in your form for the appointment date and your client's email, so you can invite them to the correct appointment as soon as you save your form input.

**Zaps:**

- [Create Google Calendar Appointments From Device Magic Forms](#)
- [Create a Google Calendar event when a record is assigned to a user in Fulcrum](#)

## Notify Anyone

Need to let your team members know when a form is filled out, or thank the customer for their business once you've finished a job? Zapier can send an SMS, email message, or push notification whenever anything happens in your form, so you can make sure everyone's notified. You can even use [Zapier's custom filters](#) to only send notifications when specific entries are received.

**Zaps:**

- [Send me an SMS when my Device Magic Form is Filled Out](#)
- [Send SMS via Twilio from new Fulcrum records](#)
- [Send a note to Pushbullet when a Fulcrum record is assigned to a user](#)
- [Send an Email With Gmail When Nexticy Forms are Filled Out](#)

## Stay in Touch

Don't let the project you're working on now be the last thing you do for your customer. Instead, add them to your email mailing list to make sure they remember your company and perhaps hire you for a new job. All you need to do is collect the customer's email address in your mobile form, and you can then add it to your [email marketing list](#) or [marketing automation app](#) as soon as you're done working.

### Zaps:

- [Add an email to an AWeber list when an email is collected in a Fulcrum form](#)
- [Add Contacts to MailChimp After They Fill Out Device Magic Form](#)

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Whether you're tracking the health of trees in a park, repairing your client's plumbing, or auditing the equipment your company owns, these apps and integrations are what you need to make the leap from paper forms. They'll be so much simpler than having to log data and then type it in from paper, you'll wonder how you ever lived without them!

Building a form looks easy, but you might be surprised to find out how many hidden features more form builder apps include. So, before you start building your new form, Chapter 4 will dig into [the most powerful yet often overlooked form features](#).

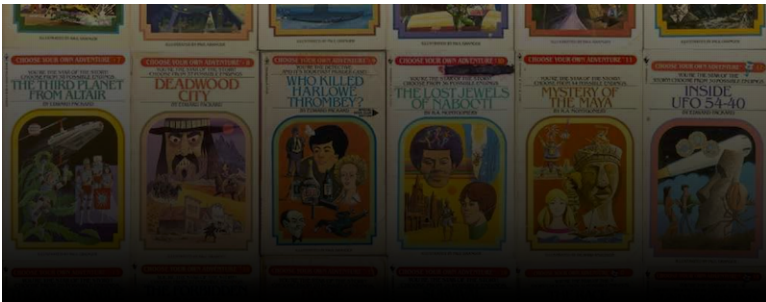
Need a traditional form builder or survey tool instead? Then jump back to Chapter 2 for a roundup of the [very best form builders](#), or skip ahead to Chapter 6 for the [best tools to make a survey](#).

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*Written by Zapier Marketer [Matthew Guay](#).*

*Image Credits: iPad photo by [Ordnance Survey](#) via [Flickr](#); Paper survey photo by [Cavale Doom](#) via [Flickr](#).*

# Chapter 4: 8 Overlooked but Powerful Form Features



Do you remember those *choose-your-own-adventure* books? Titles like, “Journey Under the Sea,” “Space and Beyond” and “Mystery of the Maya.”

Each chapter ends with a choice, much like this one:

- A) Open the door and find out what lies behind it (turn to page 53)
- B) Don't open the door, safely turn around and leave the hallway (turn to page 60)

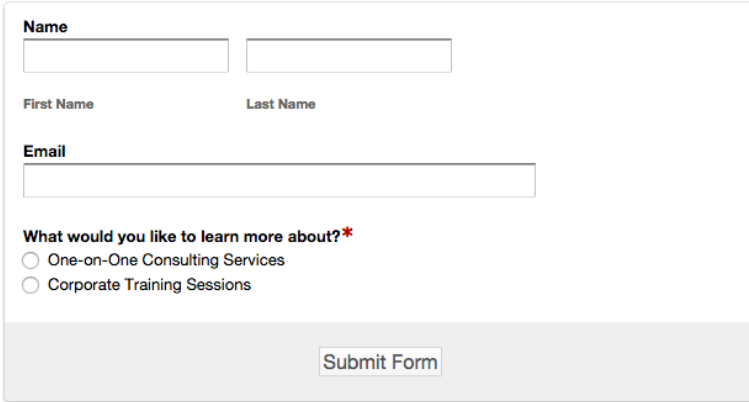
Your choice dictates your experience with the book. You and your friend could read the same book, but arrive at different endings.

Now take that concept but apply it to a web form. Two visitors to your site's “Contact Us” page start filling out your “Learn More” form.

Visitor 1 selects that he wants to learn about your one-on-one consulting services, after which he sees questions about start date, budget and focus areas.



Visitor 2 wants to inquire about your corporate training sessions, after which she's asked questions about team size, seniority level and industry.



**Name**

First Name Last Name

**Email**

**What would you like to learn more about?\***

One-on-One Consulting Services

Corporate Training Sessions

Although this might appear to be a complicated form—one that could take some time to set up—logic is a hidden feature available in many of the most popular form software options: Wufoo calls it Rules Builder, at Formstack it's called Conditional Logic, and Typeform uses the name Logic Jump. Same feature, different names.

Form apps are full of hidden features like logic. To find them, you just need to stray from the beaten path of text answers, dropdowns, and multiple choice questions. If you want to master your forms, and perfect them for your use case, it's time to familiarize yourself with these powerful form features.

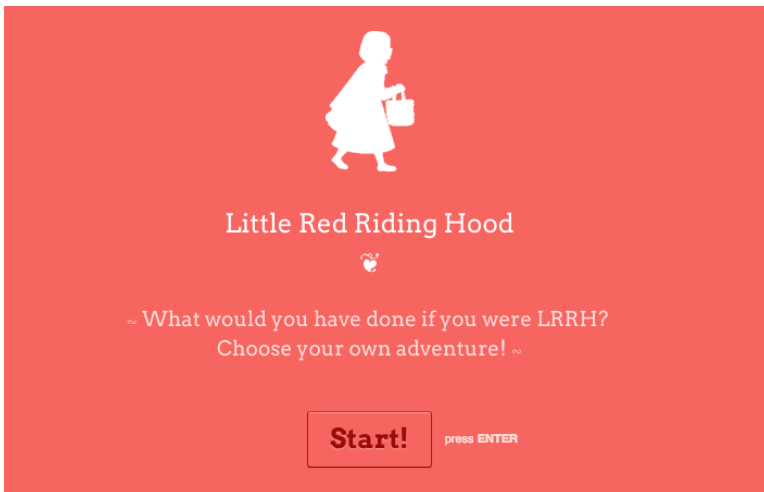
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## Form Features Your Should Know

- Logic for Customizing Questions Per Respondent
- Hidden Fields for Tracking Referrals

- Predefined Choices for Faster Form Set Up
  - Images, Icons and Videos for a Better Experience
  - Field Validation for Guaranteed Results
  - File Uploads for Easy File Collection
  - Payments for More Capabilities
  - Integrations for Automated Data Entry
- 

## 1. Logic for Customizing Questions Per Respondent



Typeform puts its Logic Jump feature on display in this choose your own adventure [Little Red Riding Hood story](#).

Rather than asking wedding guests to RSVP by mailing an enclosed postcard, modern invitations often instruct recipients to visit

a website and complete a form. It's an attractive money-saving alternative, but it can present an obstacle that would've been dealt with by sending a few different RSVP card versions: you have a variety of guests and a range of information to collect.

- Some guests are invited to the rehearsal dinner in addition to the wedding
- Some guests are invited to bring a plus-one or their whole family
- Some guests will need to note a dietary preference or restriction

A simple web form won't suffice. Instead, it's time to rig up a smart form, one that'll serve up questions based on the answer to the first question: "Last name." From there, you can start to make rules.

The screenshot shows a form builder interface for a "Wedding RSVP" form. At the top, a yellow banner reads "Here are the rules for Wedding RSVP" with an "Enable Rules" toggle. Below this, there are tabs for "Field Rules", "Page Rules", and "Form Rules". The main area is titled "Show or hide fields based on these rules." and contains three conditional rules:

1. If Last Name (Text) is Yang, then Will you be able to join ... (Radio).
2. If Last Name (Text) is Wiley, then Will you and your family ... (Radio).
3. If Last Name (Text) is Thompson, then Will you and your guest b... (Radio).

Each rule has a "SHOW" dropdown, a "Radio" dropdown, and green (+) and red (-) buttons. At the bottom, there are "Save Field Rules" and "Learn About Field Rules" buttons.

That's just the start. Rules, conditional logic, logic jumps—whatever your form app calls the feature—can go deeper. Back to the wedding RSVP example: If your guest is a "Yes" for the wedding, and he's also invited him to the rehearsal dinner, you could configure your form to ask him if he'll be in attendance there, too. Or if your guest replies

“No,” she can’t make it to the wedding, then you can set up the form to skip the questions all together and deliver her a “We’re bummed you can’t join us!” message.

Employing logic to split your form into multiple routes is called “branching”—an easy way to visualize this is with a [decision tree](#). If your form splits off into more than three “branches,” it’s helpful to first write out the logic flow on a sheet of paper.

Another trick to make it easier: initially label your form questions with what should come next, such as “Rehearsal Dinner Q.” You’ll need to go back and edit these labels, of course, but it’ll help you piece the questions together. Even a form that appears simple to the user, might be one that has dozens of branches on the backend; branches that deliver the most relevant information to the you, the form owner.

**Logic Quick Links:** [123ContactForm](#), [Cognito Forms](#), [FormAssembly](#), [FormDesk](#), [Formidable](#), [FormSite](#), [Formstack](#), [Google Forms](#), [Gravity Forms](#), [iFormBuilder](#), [JotForm](#), [Ninja Forms](#), [Typeform](#) and [Wufoo](#)

## 2. Hidden Fields for Tracking Referrals

When you’re using a form for an upcoming event, it’s helpful to know which marketing channel—such as email marketing, Twitter or Facebook—is pulling in the most registrants. Your first instinct might be to dig into Google Analytics to find out. But that won’t give you the full picture. Sure, maybe Facebook brought the most traffic, but did it net the most sign-ups? For this, you’ll want to add a hidden field to your form.

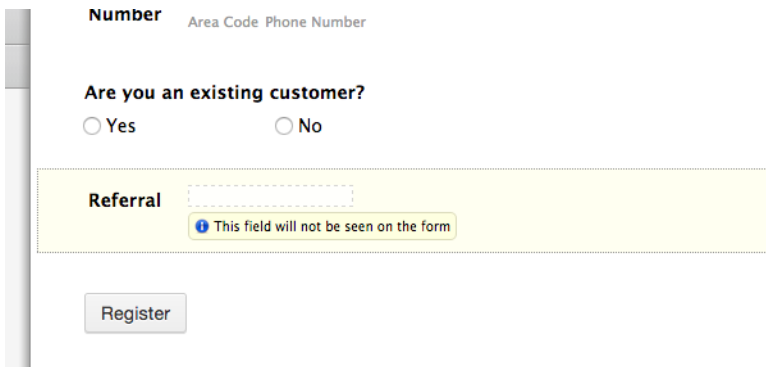
You can use a hidden field to:

- Track referrals
- Record extra information

- Customize the experience

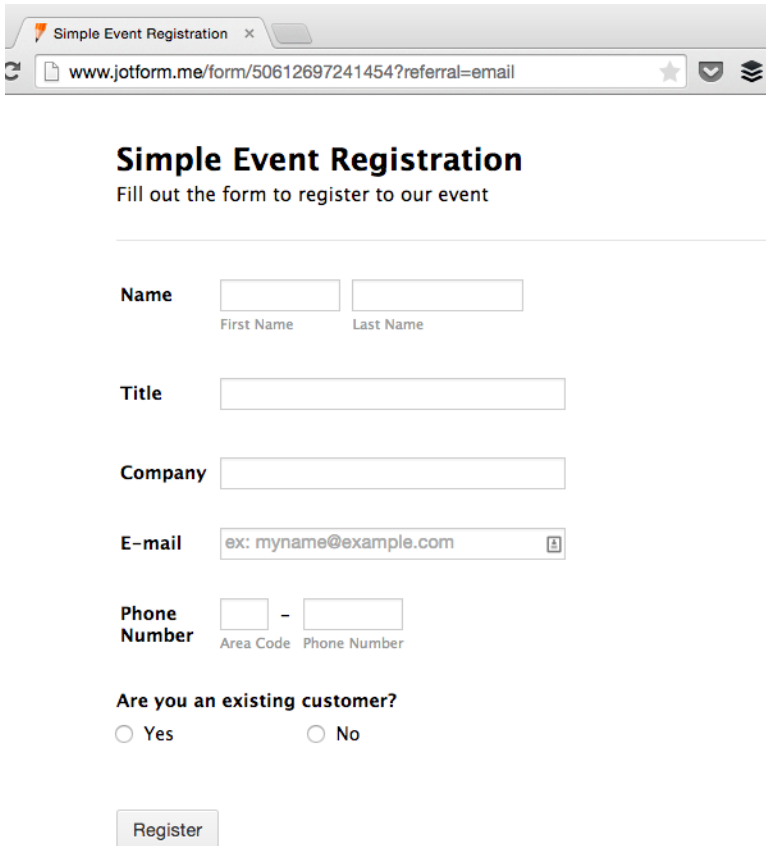
Depending on your form software, you'll be able to implement this feature without getting your hands dirty in HTML or CSS. Some apps, like Wufoo, require it.

## Track Respondent Referrals



The image shows a portion of a web form. At the top, there is a label "Number" followed by a sub-label "Area Code Phone Number". Below this is a question "Are you an existing customer?" with two radio button options: "Yes" and "No". A yellow highlighted box contains a "Referral" label next to a dashed border input field. A tooltip with an information icon and the text "This field will not be seen on the form" is positioned over the input field. Below the highlighted box is a "Register" button.

Using JotForm as an example, it'll take two steps to get this set up. First, insert a [hidden box](#) into your form and give it a descriptive label. Since we want to track registrant referrals, we'll label it "Referral." This, of course, won't show up on your live form.



**Simple Event Registration**  
Fill out the form to register to our event

**Name**    
First Name Last Name

**Title**

**Company**

**E-mail**

**Phone Number**  -   
Area Code Phone Number

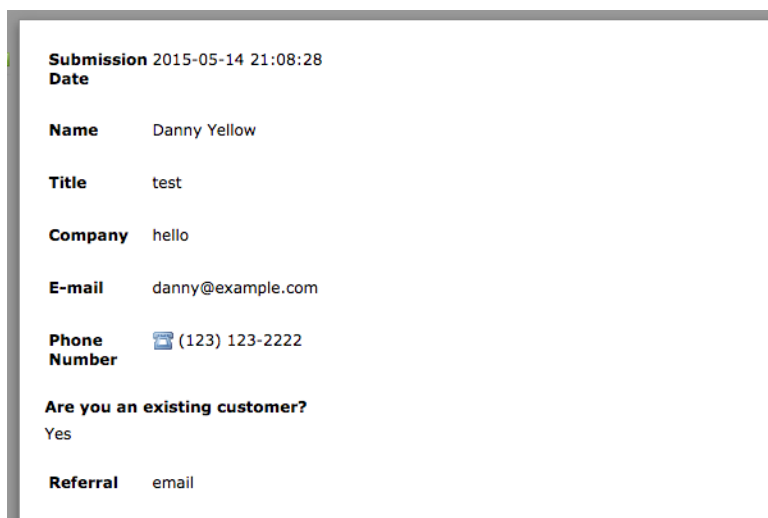
**Are you an existing customer?**  
 Yes  No

After saving the new field, open the live form and copy the URL. In this example, it's `http://www.jotform.me/form/50612697241454`. Now add a query to the end of the URL with a `?`, the hidden field you've added (`referral=`) and a value (`email`).

<http://www.jotform.me/form/50612697241454?referral=email>

This is the URL that you'll exclusively use when you send out an email announcing the webinar. When a new registrant lands on

your form through that channel, you'll be able to see it in their hidden entry.




**Submission** 2015-05-14 21:08:28  
**Date**

**Name** Danny Yellow

**Title** test

**Company** hello

**E-mail** danny@example.com

**Phone Number**  (123) 123-2222

**Are you an existing customer?**  
Yes

**Referral** email

Use the same strategy when you share the link on Facebook and Twitter, or with other event organizers, but change the keyword in the URL (e.g. `?referral=twitter` or `?referral=mikethompson`).

## Record Extra Information

Similar to how you logged the referral, you could record additional information about a registrant based on where they found your link. Again, you'd need to add hidden fields and spin up an accompanying URL, which can support more than one field.

For example, you could use the hidden field to record not only the referring site, but also the specific email list (such as your “past attendees” or “newsletter subscribers”). Or, populate demographic information when the link is disseminated on, for example, a private Facebook group made up of educators.

## Customize the Experience

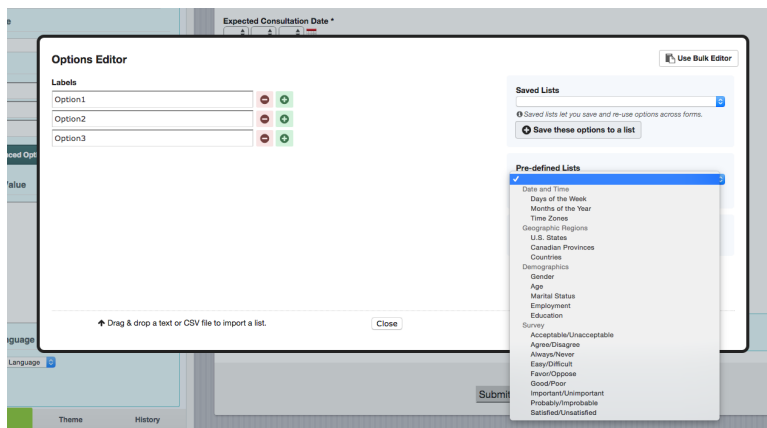
Collecting more data is a perk, but Typeform's hidden field feature takes things a step further: it lets you modify the copy of a question based on the URL that the individual clicked on. For example, try the links below to see differing welcome screens:

- <https://tutorials.typeform.com/to/VmUtC9?name=Danny>
- <https://tutorials.typeform.com/to/VmUtC9?name=Alison>

Putting this feature to work requires a bit of information about the audience for your form. But if you're aiming to make a feedback form more personal, for example, this is your ticket.

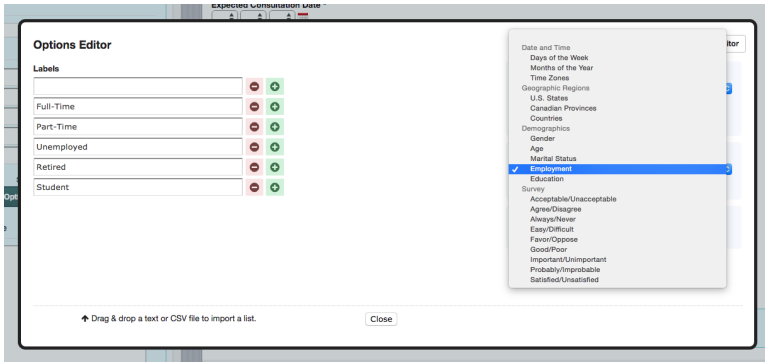
**Hidden Fields Quick Links:** [123ContactForm](#), [FormAssembly](#), [Formidable](#), [FormSite](#), [Formstack](#), [Gravity Forms](#), [JotForm](#), [Ninja Forms](#), [Typeform](#) and [Wufoo](#)

## 3. Predefined Choices for Faster Form Set Up



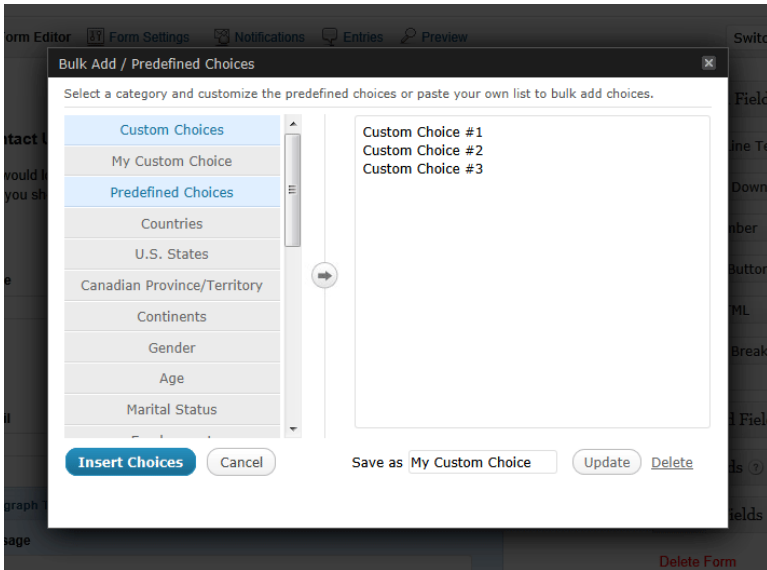


196 countries. 50 U.S. states. Ages 0-100. Instead of typing these out—answer by answer—check if your form tool offers a “predefined choices” option. Tap into this feature, and it’ll take just a few clicks to add a dropdown question with 196 choices.



Data sets vary for this feature, but common choices include: countries, U.S. states, U.S. state abbreviations, Canadian provinces/territories, age, gender, marital status, education, employment, job type, industry, income, satisfaction, importance and agreement.

Depending on your form software, you’ll be able to customize this feature for times you find yourself repeatedly using the same dropdown, checklist or multiple choice question.



**Predefined Choices Quick Links:** [123ContactForm](#), [Formidable](#), [Formstack](#), [Gravity Forms](#) and [Wufoo](#)

## 4. File Uploads for Easy File Collection

**End of Year Slideshow**

Please share your favorite photo from the year with us

**Name**


















First  Last

**Email**

**Your Favorite Photo**

or drag files here.

Tools like Dropbox and Box have changed the way we share files. But when you reverse the equation and look to gather files, the process can get tricky. Surprisingly, this is a great job for a form app. To put the tool to work, use the app's "file upload" question type, double-checking to make sure it supports the needed file size.

App	Field Upload Limit	Form Upload Limit	Upload Field Limit
 123ContactForm	Free: None; Paid: From 150MB	Free: None; Paid: From 150MB	No limit
 Cognito Forms	Free: 100MB; Paid: 1-100GB	Free: 100MB; Paid: 1-100GB	No limit
 Device Magic	File Upload not supported		
 FormAssembly	20MB	20MB	No limit
 Formbakery	File Upload not supported		
 Formdesk	Free: None; Paid: 5-50MB	Free: None; Paid: 5-50MB	No limit
 Formidable	Dependent on user		
 FormKeep	Dependent on user		
 FormSite	100MB	Free: 50MB; Paid: 500MB-4GB	No limit
 Formstack	Free: None; Paid: 25MB	Free: None; Paid: 25MB	20
 Google Forms	File Upload not supported		
 Gravity Forms	Dependent on user		
 iFormBuilder	File Upload not supported		
 JotForm	Free: 100MB; Paid: 1GB	Free: 100MB; Paid: 1GB	25 (recommended)
 Ninja Forms	Dependent on user		
 Typeform	Free: None; Paid: 10MB	Free: None; Paid: 10MB	No limit
 Wufoo	10MB	20MB	20

To access submitted files, either log into your app and download the items or use [Zapier](#)—an app integration tool—to automatically upload files to Dropbox, Box or Google Drive. Combine this with other form app integrations, which are covered in No. 8, and you'll

never need to manually export entries again.

**Zaps:**

- Add new Wufoo file uploads to Dropbox
- Add new Typeform file uploads to Box
- Add new JotForm file uploads to Google Drive

## 5. Images, Icons and Videos for a Better Experience



1 -> The patient's name is...

John Williams

2 -> The patient is a....\*

A Man

B Woman

C Boy

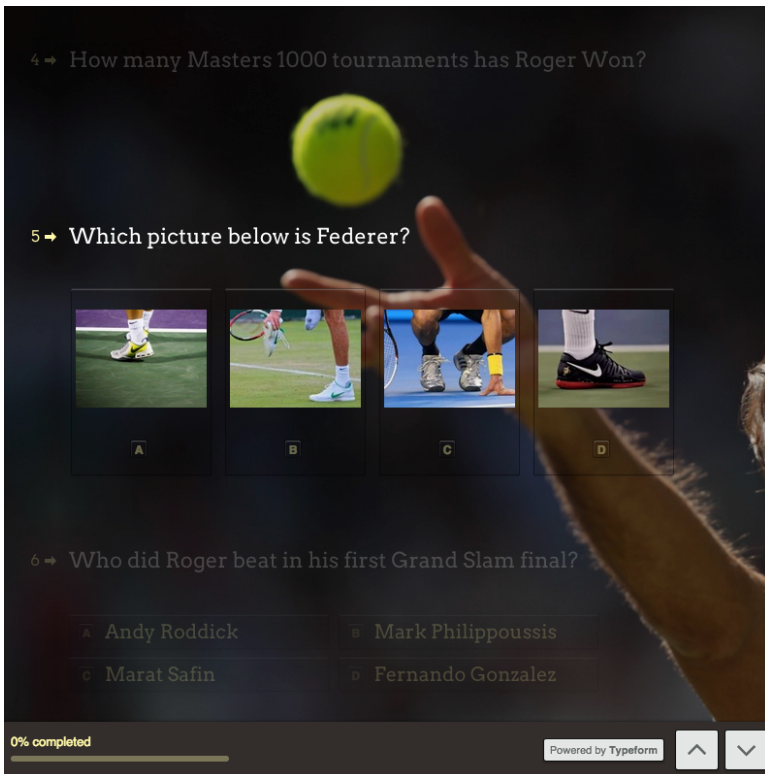
D Girl

Forms are infamously boring. But let's be honest: it's often not the form's fault; the blame is on the form creator. One trick for more engaging experience is to thoughtfully employ images, icons and video. You can do this in a variety of ways:

- Ask questions using an image with overlay text applied before it's uploaded, or using videos with subtitles or voice overs

- Ask questions with the aid of an image, icon or video
- Provide multiple-choice answer options as images, icons or videos
- Accompany answer choices with images, icons or videos

Typeform's [take on form software](#) is heavily visual, so be sure to take advantage of customization options that include the ability to change your form's background.



4 → How many Masters 1000 tournaments has Roger Won?

5 → Which picture below is Federer?

A B C D

6 → Who did Roger beat in his first Grand Slam final?

a Andy Roddick b Mark Philippoussis  
c Marat Safin d Fernando Gonzalez

0% completed

Powered by Typeform

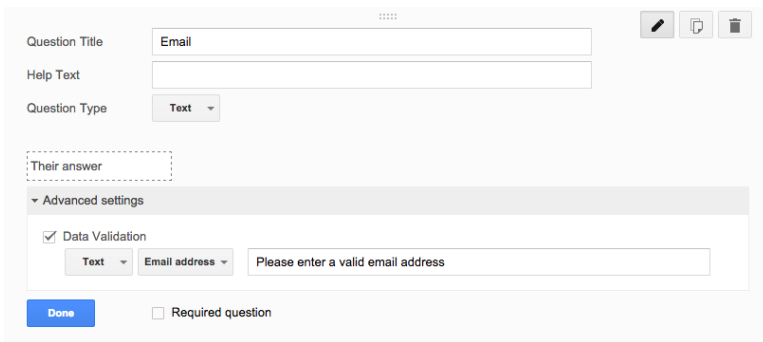
^ v

The screenshot shows a Typeform quiz interface with a dark background and a tennis ball in the center. The quiz consists of three questions. The first question asks for the number of Masters 1000 tournaments Roger Federer has won. The second question asks to identify a picture of Federer from four options labeled A, B, C, and D. The third question asks who Roger Federer beat in his first Grand Slam final, with four radio button options: Andy Roddick, Mark Philippoussis, Marat Safin, and Fernando Gonzalez. At the bottom, there is a progress bar showing 0% completed, a 'Powered by Typeform' logo, and navigation arrows.

If you're adding icons to your form questions or answers, check out the [Noun Project](#) for thousands of options that can be used with attribution, or purchased for as low as \$1.

**Image and Video Quick Links:** [123ContactForm](#), [Cognito Forms](#), [FormAssembly](#), [Formidable](#), [FormSite](#), [Formstack](#), [Google Forms](#), [Gravity Forms](#), [iFormBuilder](#), [JotForm](#), [Typeform](#) and [Wufoo](#)

## 6. Field Validation for Guaranteed Results



The screenshot shows a form configuration interface. At the top, there are fields for "Question Title" (containing "Email"), "Help Text", and "Question Type" (set to "Text"). To the right are icons for edit, copy, and delete. Below these is a dashed box labeled "Their answer". Underneath is an "Advanced settings" section with a "Data Validation" checkbox checked. Below the checkbox are two dropdown menus: "Text" and "Email address". To the right of these is a text input field containing the placeholder text "Please enter a valid email address". At the bottom left is a blue "Done" button, and at the bottom right is a "Required question" checkbox which is unchecked.

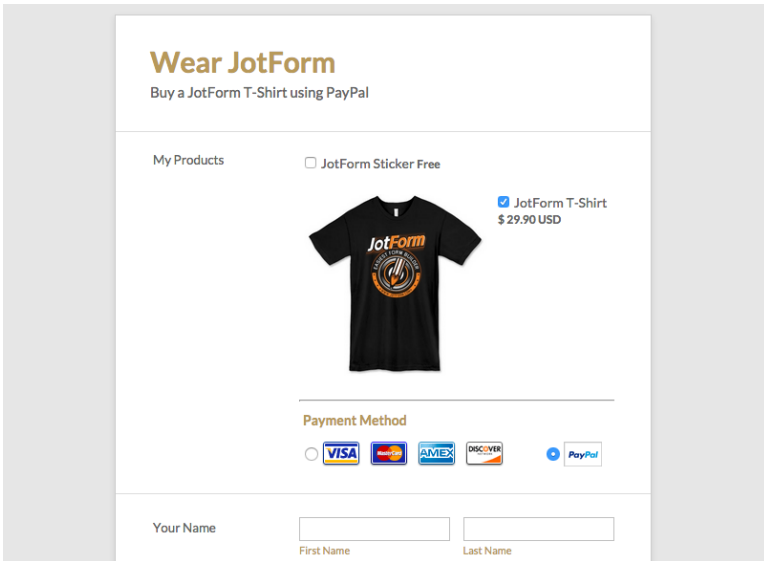
You ask for an email address and you get a response with no @ sign. You request a phone number and multiple responses are one number short. It's frustrating to get a valuable form response and find out that the answers unusable because of a typo. To avoid this, use “field validation” to enforce answer formats, such as, “Answer must contain a.”

Some form software, such as Google Forms, calls this “field validation,” while others like Wufoo take an explicit approach and offer question types like “Phone,” “Email” or “Website.” So before you add a custom field for a commonly asked question—such as “Name”—check to see if there's a specific “Name” field to add that requires the respondent to enter their “First Name,” “Middle Initial” and “Last Name.”

**Field Validation Quick Links:** [123ContactForm](#), [Device Magic](#), [FormAssembly](#), [FormBakery](#), [FormDesk](#), [Formidable](#), [FormSite](#), [Form-](#)

stack, Google Forms, Gravity Forms, iFormBuilder, JotForm, Typeform and Wufoo

## 7. Payments for More Capabilities



The screenshot shows a checkout form titled "Wear JotForm" with the subtitle "Buy a JotForm T-Shirt using PayPal". Under "My Products", there is a checkbox for "JotForm Sticker Free" and a checked checkbox for "JotForm T-Shirt" priced at "\$29.90 USD". An image of a black t-shirt with the JotForm logo is displayed. Below the product is a "Payment Method" section with radio buttons for VISA, MasterCard, AMEX, DISCOVER, and PayPal. At the bottom, there are two input fields for "Your Name", labeled "First Name" and "Last Name".

Although you might not turn to form software when you're preparing to sell a product or service online, it's time to give it consideration. Whether it be event tickets, program registration, or charity fundraising, use a "payment" field to close the sale. Charges are handled by the form software's integrated payments provider, such as Stripe, PayPal or Chargify—you'll just need to have an account with one of those services.

A form's payment fields are a quick route to handling transactions online, but it should be noted the apps themselves lack the customer database, transaction management and inventory features you'd find in an e-commerce tool like Shopify, WooCommerce or Magento. If you have you a fairly simple offering though, such as

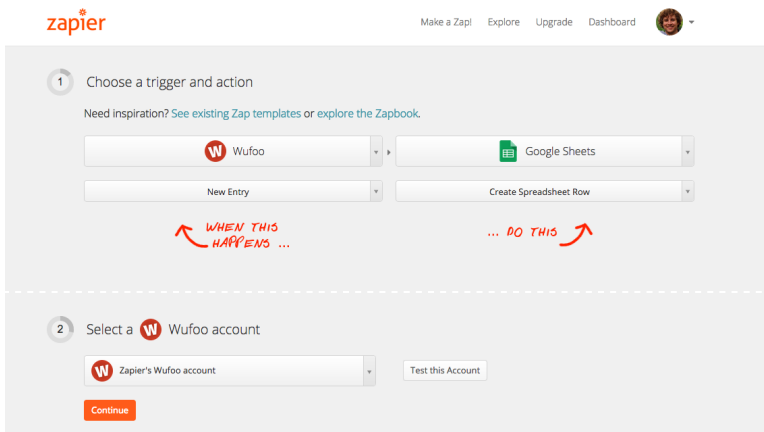


selling a T-shirt, you'll be satisfied you stuck to your familiar form tool.

### Payments Quick Links:

[123ContactForm](#), [Cognito Forms](#), [FormAssembly](#), [Formidable](#), [Form-Site](#), [Formstack](#), [Gravity Forms](#), [JotForm](#), [Ninja Forms](#), [Typeform](#) and [Wufoo](#)

## 8. Integrations for Automated Data Entry



The screenshot shows the Zapier interface for creating a new Zap. At the top, the Zapier logo is on the left, and navigation links for 'Make a Zap!', 'Explore', 'Upgrade', and 'Dashboard' are on the right. The main area is divided into two steps:

- Step 1: Choose a trigger and action**  
This step includes a link for 'Need inspiration? See existing Zap templates or explore the Zapbook.' Below this, there are two columns of dropdown menus. The first column has 'Wufoo' selected as the trigger, with 'New Entry' chosen as the specific trigger event. A red handwritten note 'WHEN THIS HAPPENS ...' with an arrow points to this selection. The second column has 'Google Sheets' selected as the action, with 'Create Spreadsheet Row' chosen as the specific action. A red handwritten note '... DO THIS' with an arrow points to this selection.
- Step 2: Select a Wufoo account**  
This step shows a dropdown menu with 'Zapier's Wufoo account' selected. To the right is a 'Test this Account' button. At the bottom left of this step is a red 'Continue' button.

Forms are where you collect information, not where you categorize, organize, analyze and act on it. That's in another app—your CRM software, email marketing tool or project management suite. So rather than managing ongoing CSV exports and imports, use Zapier to link your form tool directly to your other apps.

Zapier works by watching for events in one app, such as a new form entry, and then performing an event in another app, like a spreadsheet tool. After you set up a Zapier integration, every event going forward triggers the second event (e.g. every new Wufoo form

entries could be automatically added as a new row in a Google Sheets spreadsheet).

Connecting a form app with Zapier yields a wide array of [form automation](#), including popular integrations with Google Sheets, Gmail, MailChimp, and Salesforce.

## **Automate Spreadsheet Imports**

- [Save new Wufoo entries to a Google Sheets spreadsheet](#)
- [Send Formstack entries to Smartsheet](#)
- [Save new Typeform entries in Quip](#)

## **Get New Entry Notifications**

- [Get Slack notifications for new JotForm form submissions](#)
- [Send an Email when Formidable form is filled out](#)
- [Get SMS notifications for new 123ContactForm submissions](#)

## **Build an Email List**

- [Create MailChimp subscribers from Typeform entries](#)
- [Use Gravity Forms Entries to Create New Subscribers in Emma](#)
- [Create Infusionsoft contacts from Ninja Forms form submissions](#)

## **Nurture New Leads**

- [Follow Up with Completed Wufoo Forms from Your Gmail](#)
- [Send Twilio text messages from Ninja Forms form submissions](#)
- [Add new Typeform entries to Drip](#)

## Automate CRM Data Entry

- [Create Salesforce Leads via Gravity Forms](#)
- [Create Pipedrive Deals via Wufoo Form](#)
- [Use JotForm to Collect Leads for Base CRM](#)

## Kick off Project Management Workflows

- [Add new Formstack entries to Asana as tasks](#)
- [Create Trello cards from FormKeep submissions](#)
- [Create new Wrike tasks from Wufoo form entries](#)

## Generate New Documents

- [Create Personalized Documents from Gravity Forms with WebMerge](#)
  - [Create Personalized Documents from JotForm with WebMerge](#)
  - [Save Typeform entries as text files in Dropbox](#)
- 

## More Form Features

Beyond the eight features highlighted in this chapter, the form app you use will undoubtedly have hidden but powerful features, too. Google Forms, for example, lets you restrict a form to users of a shared Google Apps domain, turning it into a great option for confidential internal feedback. When the respondent submits the form, too, it'll automatically log the individual's username. Then there are more common, but still a bit hidden, features like shuffling the answers or questions or adding “[Admin Only](#)” fields that can be completed when an account administrator reviews submissions.

---

To get the most out of your form app, make sure you've dug into the features in this chapter, explored the app's Zapier integration and perused the tool's help pages. Then, it's time to automate your form so you won't have to copy and paste data from your form app into your spreadsheet, email tools, and more. We'll look at that in Chapter 5, with examples from real teams and companies on [how they use forms in their work](#).

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\*Written by Zapier Marketer [Danny Schreiber](#).

# Chapter 5: There's a Form for That: 20+ Ways to Optimize Form Apps for Your Work



Most businesses require a number of specialized tools: apps to let customers get in touch, share feedback, place orders, get support, schedule appointments, and more. You could go find a pre-made tool for everything your company needs, or you could construct everything you need by hand.

Building your own tools sounds daunting. But companies around the world have done just that—without writing a single line of code—using form software together with [Zapier](#), an app integration tool.

Forms are among the most versatile tools out there. Suspicious? Here's your proof: this chapter describes how dozens of companies have used forms to build their own internal products, streamline communications, backup their data, and more.

**Don't have a form app yet?** Jump back to Chapter 2 for a [roundup of the best form software](#) first, then come back here for ideas on how to utilize your new form app.

---

## Use Form Software to:

- Streamline Your Communications
- Manage Your Data
- Connect with Any App
- Build a Startup
- Keep Your Company Going

---

## Streamline Your Communications

“If we can get visitors on our websites to complete an online form, we are able to start a conversation with them and close a sale.” Kartik Isvarmurti, founder, [VMG BPO](#)

“Contact Us” forms are one of the most popular forms you’ll find on business websites, but almost any type of form can be used to aid your team’s communication strategy. No matter what type of form you have, odds are it collects the contact details of the person who filled out the form, giving you a chance to follow up. Add integrations to that form with Zapier and you can start automating your follow up each time a new submission is received. Or change up the form’s fields and you can start using it for social media, team notifications and more.

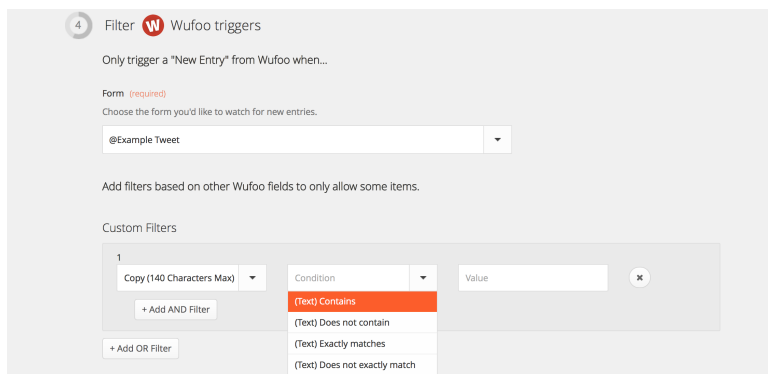
## 1. Send Personalized Follow-up Messages

Every form on your website should ask for at least an email address. Period. That's your chance to reach out and thank the individual for filling out your form, and perhaps share more information about your company.

The [Powerlinx](#) team does just that with their [Typeform](#) form, by sending the contact info of everyone who fills it out to [Intercom](#), which then sends out a personalized email. "It took only a few minutes to set up," says Powerlinx user experience lead Yoni Cohen, "and the response was great."

- **Zap:** [Add new Intercom users from Typeform form entries](#)

Depending on your form, sending a follow-up email might be the difference between making and losing a sale. As [Joe Capone of Webier Consulting](#) says, "When someone fills out an information request form, it is important to get back to them instantly with a response." But you have to make sure you send the appropriate response.



The screenshot shows the Zapier interface for configuring a filter for Wufoo triggers. The filter is titled "Filter Wufoo triggers" and is set to trigger on a "New Entry" from Wufoo. The form being watched is "@Example Tweet". The filter is configured with a custom filter rule: "Copy (140 Characters Max)" is the field, and the condition is "(Text) Contains". The value field is empty. The filter is currently set to "AND" logic.

4 Filter Wufoo triggers

Only trigger a "New Entry" from Wufoo when...

Form (required)  
Choose the form you'd like to watch for new entries.

@Example Tweet

Add filters based on other Wufoo fields to only allow some items.

Custom Filters

1

Copy (140 Characters Max) Condition Value

+ Add AND Filter

+ Add OR Filter

(Text) Contains  
(Text) Does not contain  
(Text) Exactly matches  
(Text) Does not exactly match

To do that, use Zapier's filters and conditional logic to send appropriate follow-up emails to customers, and also send emails to the

correct people on your team so they can follow up with a personal touch. This lets your team work fast and with consistency, and that's been a winning combo for Webier Consulting, where they use WordPress form plugin Formidable for their team's forms and then send emails via Zapier when those forms are filled out.

"Consistency in our responses allows us to scale our business to a point where we simply would not be without Formidable and Zapier," Capone says.

**Zaps:**

- [Send an Email when Formidable form is filled out](#)
- [Send Mandrill email when Formidable form is filled out](#)
- [Send an email from Gmail when Formidable form is filled out](#)

You can achieve the same results with your forms, by integrating them with your email and marketing apps. That way, you can reach out immediately, have your team reach out later, or add customers to your mailing list so they'll stay informed about your company.

**Zaps:**

- [Send an email from Mandrill when your Formstack form is filled out](#)
- [Send emails for new FormKeep submissions](#)
- [Send an Email With Gmail When Nexticy Forms are Filled Out](#)
- [Send email notifications or follow-ups from new Typeform entries](#)



## 2. Notify Your Team for Next Steps

SWIVUL

Swivul brings you fresh tips every Saturday until 1 AM EST.

1 → What do you want to do? \*

Choose as many as you like

<input type="checkbox"/> Learn	<input type="checkbox"/> Play Sports	<input type="checkbox"/> Dine
<input type="checkbox"/> Watch Sports	<input type="checkbox"/> Relax	<input type="checkbox"/> Drink
<input type="checkbox"/> Exercise	<input type="checkbox"/> Dance	<input type="checkbox"/> Hook Up
<input type="checkbox"/> Other		

2 → Zip Code \*

0 of 4 answered

Create your own Typeform

Powered by Typeform

### Swivul, Aaron Wolfson's form-powered startup

Your customers aren't the only ones you should contact when your form is filled out. You'll also need to notify your team, so they can get to work on the new data that's been entered.

[Aaron Wolfson](#), for example, wanted to make an app that'd give personalized recommendations for something fun to do on the weekend via an online form and SMS messages. So, Wolfson and his team put together [Swivul](#) with just a form integrated with Zapier during Startup Weekend Nebraska. "We put up a landing page with an embedded form in it asking for phone numbers within 30 minutes," says Wolfson.

That form also asked for people's interests, location, and phone number, and then Zapier sent the results to a Google Sheets spreadsheet for safekeeping, and posted them on Slack to notify the Swivul team. "The actual event-finding and suggesting is still manual," says Wolfson, so the Slack notifications help everyone know which tasks to take on next. And the whole project was a success, with 10% of the

people who visited the page filling out the entire form and receiving an activity recommendation.

**Zaps:**

- [Get Slack notifications for new Typeform entries](#)
- [Save new Typeform entries to a Google Sheets spreadsheet](#)

Different notifications work best for different forms and situations. Sometimes an SMS to every team member fits the bill, while a private chat message to specific team members is more appropriate in more sensitive settings. Either way, it's easy to stay on top of what's been put in your form when Zapier's sending the notifications to the apps of your choice.

**Zaps:**

- [Send me an SMS when my Device Magic Form is Filled Out](#)
- [Get Slack notifications for new Ninja Forms form submissions](#)
- [Get a Pushbullet push notification whenever your Wufoo form is filled out](#)

### **3. Schedule Social Media Posts**

Perhaps you don't need to be notified when your form is filled out. Instead, maybe you need a form that'll help you notify the rest of the world about the things that are going on in your company. See, sharing your company's Twitter and Facebook accounts with everyone in the company can be difficult at best. Instead, you could build an internal form for social updates, and then use Zapier to send them out—and you'll only have to sign in once.

That's how the [Campaign Monitor](#) team handles their social media marketing. They've created a Wufoo form that's connected to

Buffer, which lets anyone from the marketing, support, and design teams schedule a Tweet.

“Now, instead of sending me an email, they can fill in the tweet details, then have it automatically scheduled for the distant future—ready for us to approve, modify and queue in Buffer,” says Campaign Monitor community manager Ros Hodgekiss.

- [Zap: Add post to Buffer queue from Wufoo form](#)

For small teams, a form that's connected to Twitter, Facebook, or LinkedIn pages might be enough. Larger teams might want to link a form to Buffer as Campaign Monitor did. Or, you could even have the messages go to a spreadsheet first, and then have them automatically sent to Buffer once they're approved. That'd help make sure you [never accidentally send a Tweet](#) you didn't intend to send from your company account.

**Zaps:**

- [Send a Tweet from your Gravity Forms form](#)
- [Post to your Facebook Page from a JotForm form](#)
- [Send Typeform form entries to your Buffer queue](#)

## 4. Create Posts on Your Blog or Forum

Your audience isn't just waiting to hear what you have to say—they also have their own stories they'd like to share. Those can be perfect pieces of content to include in your [blog](#), [case studies](#), discussions and more, and a form can give you an easy way to gather them and put them directly to use.

Youjin Do, for example, is working on a [documentary about digital nomads](#), and wants stories from other digital nomads to include in the video. A [Typeform form](#) makes that possible. The form educates

people about the project, tells them what is needed, and then gives them space to share their story and upload their own video clips that can then be compiled into the full-length documentary.



Are you a digital nomad yourself?  
Please submit your 1 minute video and share your nomad story.

[Start](#) press ENTER

The form Youjin Do's using to [gather submissions for a documentary](#)

The [Vadamalai Media Group](#) team does something similar, but with even more automation. They run a [vBulletin](#) forum [about agriculture](#), where members can post products they want to buy or sell. But that turned out to be too difficult of an action to have visitors complete. "We were losing a lot of valuable business inquiries and leads since they were not getting posted on the website," says Vadamalai Media Group founder Kartik Isvarmuti.

So, instead, they made a [Wufoo](#) form that makes it easy for visitors to fill out with information about the items they want to buy or sell. Or, visitors could call the company, and an agent would fill out the form for them. Then, they connected the form with vBulletin via Zapier.

There's no direct integration with vBulletin in Zapier, so instead they used Zapier's RSS tool to make a new RSS feed entry whenever

the form was filled out. VBulletin then makes a new forum post whenever there's a new entry in the forum. Best of all, as Isvarmuti says, "All this was set up within 10 minutes without knowing anything about coding!"

- **Zap:** [Create an RSS feed of Wufoo form entries](#)

There are many ways you can do something similar for your blog. You can use Zapier's WordPress integration to create draft blog posts from a form, or use a WordPress form plugin like [Gravity Forms](#) or [Formidable](#) to create a post directly. If you're using a flat-file CMS, you could have your form saved to a new text file in Dropbox. Or, you could turn your form into an RSS feed as Isvarmuti did, and use a plugin on your CMS to import it as new posts.

**Zaps:**

- [Create WordPress Posts From Device Magic Forms](#)
- [Save Each Typeform Entry to a Unique Dropbox Text File](#)

## Manage Your Data

"Don't waste time trying to be clever with how you parse data. The folks at Zapier have already figured that out. It just works." Tofan Rahimpour, COO, [Logoworks](#)

Your form likely stores data in an online spreadsheet-like viewer, but there's little you can do with the info there. Instead, you'll end up downloading a CSV file, opening it in Excel or Numbers, and analyzing your data from there.

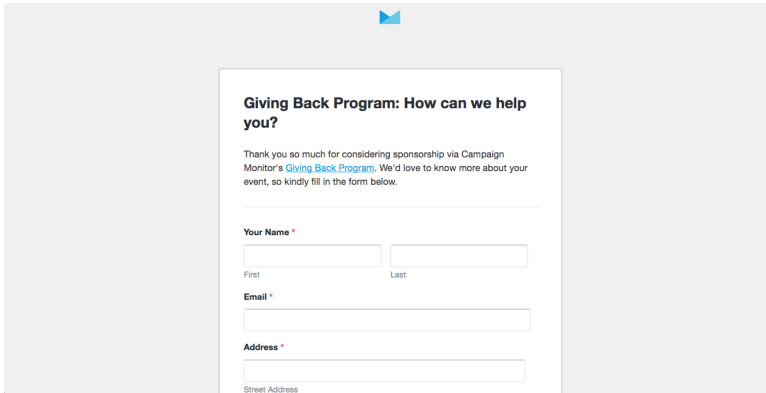
Or, you could have your form data get sent to a spreadsheet or database automatically. There, you can sort and visualize your data easily, and even turn it into a central part for other integrations by using your spreadsheet or database as the trigger for your other Zaps.

Here are some ways you can put your form data to use in a spreadsheet using Zapier's integration with [Google Sheets](#), Excel (via [Magi Metrics](#)), or [Smartsheet](#) (alternatively, you can use any of the [database tools that Zapier supports](#)).

## 5. Organize Data in a Spreadsheet

There are plenty of tools out there if you want to sort and visualize your data, but few are as versatile as a spreadsheet. The original “killer app” on the PC lives on, whether in Excel on your computer or in Google Docs wherever you happen to be working. And with Zapier, you can make your spreadsheet smarter.

The Campaign Monitor team has found that spreadsheets are still the simplest tools for them to use in many of their projects. Their [Giving Back](#) project, where they give away free food and prizes to web design meetups, is one such use case. They use a Wufoo form to let people request a sponsorship, along with another form to submit payment info internally, and then connect those forms to a Google Sheets spreadsheet with Zapier.

A screenshot of a web form titled "Giving Back Program: How can we help you?". The form is set against a light gray background with a small blue envelope icon at the top center. The form content includes a thank-you message, a "Your Name" field with "First" and "Last" sub-fields, an "Email" field, and an "Address" field with a "Street Address" label below it. All fields are currently empty.

### Campaign Monitor's Giving Back form

“By using Wufoo and Zapier, we can get all the information we need from payees and neatly spreadsheet it up using Google Docs,” says Hodgekiss. “Our accounts team are more comfortable using Google Docs than having us email through separate invoices.”

- **Zap:** [Save new Wufoo entries to a Google Sheets spreadsheet](#)

Spreadsheets are simple to put together, and Zapier can link every field on your form to a new column in your spreadsheet. Then, you can use your spreadsheet's built-in tools to sort through the data, generate graphs, and crunch numbers.

### Zaps:

- [Save new Typeform entries to a Google Sheets spreadsheet](#)
- [Save new Gravity Forms submissions to a Google Sheets spreadsheet](#)
- [Send Formstack entries to Smartsheet](#)
- [Save Wufoo form entries to Excel with Magi Metrics](#)

## 6. Make Sure No Data is Ever Lost

Zapier can make it quicker to build integrations between apps and your own internal databases—and it can also make those connections work better. That's what the [Executive Employers](#) team found out during their early periods of high growth. Their site would get swamped after media coverage, knocking out their servers and causing data loss.

So, instead of relying on their own infrastructure, they used Typeform for forms, [Braintree](#) for payments, and Zapier to send them both to their internal database. “Now if we experience any issues, we find a solution and as soon as we are live we can transmit all ‘*failed transfers*’ from Zapier with a click of a button,” says Executive Employers spokesperson William Parker.

- **Zap:** [Save Typeform form entries to a MySQL Database](#)

That's a clever way to make your own internal database connections work better, giving you an internal copy of your data and ways to make sure you never lose anything. Plus, with just a form connected to a database, you can build your own database-powered apps without having to design a custom interface to add data.

**Zaps:**

- [Save Wufoo form entries to a MySQL database](#)
- [Save Formstack form entries to a QuickBase database](#)

## 7. Clean up Data

The data you get from a form can be messy. You might have data in the wrong field, addresses in the wrong format, missing data fields, and more. You can connect your form directly to any of the other



apps Zapier supports—but if your data isn't rather consistent, you might end up with trouble.

To fix that, the [Powerlinx](#) first sends their form and survey data to a Google Sheets spreadsheet, where they can clean up the data and then send it out to Intercom, Salesforce, and other apps. You can manually clean up data in the spreadsheet and put it in another sheet to trigger the next Zap (a Zapier automation), or you could use special formatting and tweak your Zap to combine rows and make your data look nicer automatically.

**Zaps:**

- [Save new Typeform entries to a Google Sheets spreadsheet](#)
- [Add Intercom user from Google Docs Spreadsheet](#)
- [Add Salesforce leads from a Google Docs Spreadsheet](#)

Using a spreadsheet first can be a great way to accomplish things a Zap and your form couldn't do on their own. As Powerlinx's Cohen tells us, "If you don't see a direct integration, think if there's a way that manipulated data in a spreadsheet could trigger a second Zap to get the job done. Multiple Zaps are useful!"

So, if you have an app integration you can't get to work with your form and Zapier, try sending the data to a spreadsheet first. Get creative, and you just might be able to hack your own solution using one of the most flexible apps ever: your spreadsheet.

**Related:** [How to Get Any App to Work with Zapier](#)

## 8. Schedule Travel

When you think of a spreadsheet, a table full of financial statements or a list of detailed product listings likely comes to mind. You might even think of the standard form's data output, perhaps with rows of

contact info and preferences. But a spreadsheet can be a great way to schedule stuff, too.

That's why the Campaign Monitor team has yet another way they use forms and spreadsheets: to schedule travel. "Being able to coordinate travel plans, like flights, arrival times, contact details and more using Wufoo and Google Docs allows us to efficiently book accommodation and coordinate our trips to and from the airport," says Hodgekiss. There's no reason to ever make an arrivals schedule by hand again when you have a spreadsheet managing it for you automatically.

You can manage almost anything in a spreadsheet. All it takes is a bit of creativity, and a form to give you an easy way to add data, and you'll have a new "app" for that special task you need to manage.

## Connect With Any App

"I use Wufoo for all of my data collection. It's one of the core apps for my business along with Zapier, Pipedrive, and Trello." Lawrence Watkins, founder, [Great Black Speakers](#)

Forms and spreadsheets go together like sushi and soy sauce. But remember that forms play nice with other kinds of apps, too. You already have a suite of apps that your business relies on—email, CRM software, accounting tools, etc.—and forms provide a simple way to get data into them.

Some form software may directly connect with your apps, or you can use Zapier to send the data from your forms to your other apps automatically. You can even [add filters](#) to each of your Zapier integrations with your form, to make sure the correct data goes to the app of your choice. That way, you can have one Zap that—for example—adds *only* the contacts who want to receive your emails to your MailChimp list.

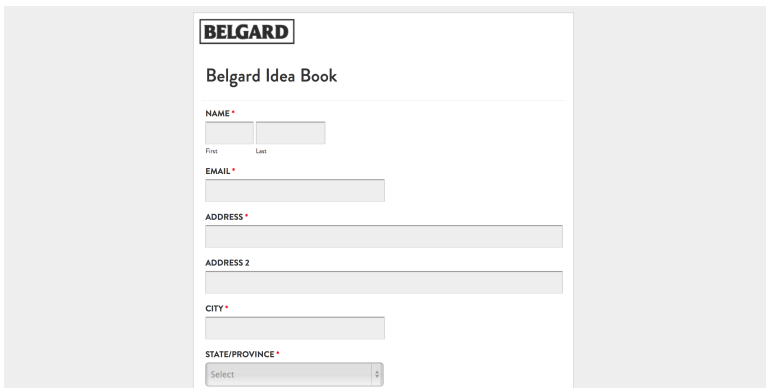
Here are some great ways you can connect your apps with your forms and accomplish more together.

## 9. Add Contacts to Your CRM

Since most forms collect contact information, one obvious place to store that data is in a [CRM](#) (customer relationship management) app. Whether you're using a [standard CRM](#) to manage leads, or a [marketing automation CRM](#) to automatically reach out with emails, you'll want to save the contact info from your forms to your CRM to make the most of each entry you collect.

And yet, just connecting your form to your CRM might not be so easy, as [Oldcastle](#) web developer Ben Ryerson has found.

“We have a large and highly customized installation of Salesforce, which has always posed a challenge for any type of API integration,” says Ryerson. “Zapier allows me to pull every single field available in our Salesforce application and easily map the Wufoo forms and form fields to exactly the correct field in Salesforce, creating a properly sanitized lead for our sales reps.”

A screenshot of a web form titled "BELGARD Belgard Idea Book". The form is white with a light gray border. At the top left, there is a logo for "BELGARD" in a black box. Below the title, there are several input fields: "NAME" (with sub-fields for "First" and "Last"), "EMAIL", "ADDRESS", "ADDRESS 2", "CITY", and "STATE/PROVINCE" (a dropdown menu with "Select" as the current option). Each field has a red asterisk indicating it is required. The form is set against a light gray background.

One of Oldcastle's Wufoo forms, for their Belgard brand

Zapier also helps Oldcastle streamline multiple forms into the same Salesforce records. “One of our busiest consumer sites, [belgard.com](#), uses multiple Wufoo forms for several different types of user submissions (contact, several different types of collateral ordering, newsletter sign up, etc.)” Ryerson says. “In order for our Salesforce installation to properly sort and categorize the leads as they come in, I have to pass multiple variables that the user never needs to see. Zapier allows me to easily pass custom data to those fields while still capturing all the Wufoo form submissions quickly and accurately.”

- [Zap: Save All New Wufoo Entries as Leads in Salesforce](#)

Perhaps your best leads don't come from a site; perhaps they come from in-person meetings. Then, you might want a form that lets you capture leads on the go, as [Thinking Beyond Borders](#) co-founder Robin Pendoley needed.

“We used [Formidable](#) and Zapier to build a lead-capture form that we use on tablets when working a table at trade shows,” says Pendoley.

When a potential customer fills out the form, they receive an email with more information about Thinking Beyond Borders, and their contact info is saved to the company's Salesforce account. It saves their team time, and as Pendoley said, “Best of all, our email follow-up is the very first one they receive of all of the vendors in the room!”

**Zaps:**

- [Send an email from Gmail when Formidable form is filled out](#)
- [Add new Salesforce Leads from Formidable form entries](#)

No matter what CRM or form you use, or how you gather your leads, a Zapier integration is all you need to automate your sales process and make sure no leads ever fall through the cracks.

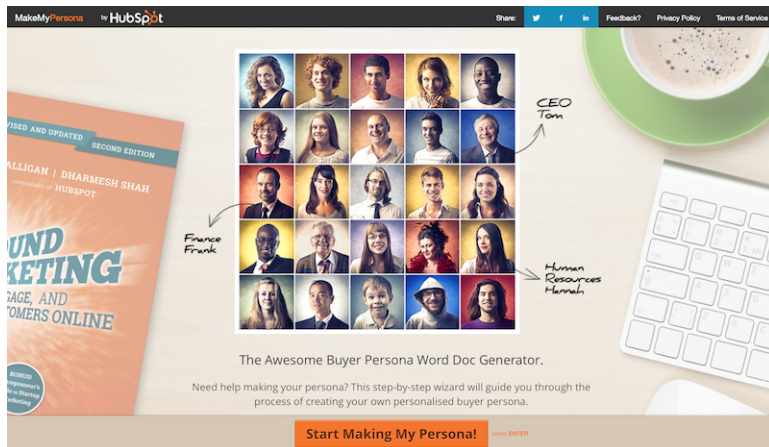
## Zaps:

- Send Gravity Forms Contact to Capsule CRM
- Save JotForm Leads to SugarCRM
- Create Solve CRM Contacts via a Google Spreadsheet or Form
- Automatically Create Nutshell CRM leads from JotForm Form Submissions

## 10. Create Documents

You have form documents with blanks to add names, events, and more. Why not make a form with each of the fields, and then use it as an easy way to automatically generate documents? That'd make it much quicker to create form letter, contracts, and more, and could open up some unique ways to use document templates.

The [HubSpot](#) team, for example, built the [MakeMyPersona](#) tool as a fun way to make a marketing persona document, and as a way to generate sales leads. The site is mainly a Typeform form with questions about your work, position, and more.



HubSpot's persona generator, [MakeMyPersona](#)

Fill the form out, and it uses Zapier to send the data to [WebMerge](#), where it's turned into a Word document that showcases your role at your company in a resume-like template. Once WebMerge makes the document, it's emailed back to you—and with a bit of custom programming, HubSpot adds the contact to their own databases to follow up with them.

**Zaps:**

- [Create Personalized Documents from Typeform with WebMerge](#)
- [Add new HubSpot contact from Typeform form](#)

No matter what type of form documents you have, you can add them to WebMerge, then integrate your own forms or other apps with it using Zapier to let your team automatically create documents without having to open Word. You'll never need to search for a blank template document again.

**Zaps:**

- [Create Personalized Documents from Gravity Forms with WebMerge](#)
- [Create Personalized Documents from JotForm with WebMerge](#)
- [Create Custom Documents in WebMerge From a Google Docs Spreadsheet](#)

## **Reuse Data in Your Forms**

Forms don't have to be just the front-end to your business processes. Depending on your form app, you might also be able to use them

to update data in your apps, or let your apps pre-fill the form with some of the data that you already have.

[Efficient Foundations](#) director Sven Scheepers, for example, uses [iFormBuilder](#) with Google Sheets. The form software sends new records to Google Sheets, where they're organized along with other data. Then, it sends any new data in the spreadsheet back to iFormBuilder so it can populate form fields automatically.

“Prior to using Zapier, the field users or office staff would have to fill in things like a site name, site contact, email, phone, etc.,” Scheepers says. “They can now enter this once as a shared Google Sheet, and then field users can simply select a site name and it will automatically populate the other fields.”

**Zaps:**

- [Add iFormBuilder form entries to a Google Docs spreadsheet](#)
- [Send Google Docs Spreadsheet data to iFormBuilder database](#)

The [1st Light Energy](#) team does something similar with [Salesforce](#) and iFormBuilder. They send new form records to Salesforce, and new CRM data back to iFormBuilder to make it easy to look up data from other records. “What would have been months of development work turned into just hours of set up,” says 1st Light Energy administrator Dustin Kost.

**Zaps:**

- [Add Salesforce custom object from iFormBuilder entries](#)
- [Add Salesforce object data to iFormBuilder database](#)

All forms don't need to be pre-filled—but your internal forms could likely be much more useful if you pre-fill them with the data you already have. If your form lets you add entries via Zapier, link your apps back to your forms to make sure your data is accessible wherever you need it.

## 11. Integrate with Any Form

Odds are, the form app you're using is supported by Zapier—there are over a [dozen great form apps](#) you can use with it today, with more being added all the time. But if your form doesn't work with Zapier, don't despair.

Weiber Consulting's Capone needed to integrate with iFrame-powered forms for the insurance site [insuringincome.com](#). The problem was the forms are built by third-party vendors and the only thing the forms could do was send an email. Whenever someone would fill out the inquiry form, one of his team members would have to open the email and manually reply.

A screenshot of a web form titled "Instant Life Insurance Quote". The form contains several input fields: "State" (dropdown menu set to Massachusetts), "Birthdate" (calendar picker for June 15, 1977), "Gender" (radio buttons for Male and Female), "Smoker/Tobacco" (radio buttons for Yes and No), "Health Class" (dropdown menu set to Preferred Plus), "Type of Insurance" (dropdown menu set to 30 Year Level Term), "Face Amount" (dropdown menu set to \$2,000,000), and "Minimum Rating for Company" (dropdown menu set to A Excellent). At the bottom of the form is a "Compare Now" button.

Insuring Income's basic form

That's not a great solution, so they switched to using [Mailparser.io](#), an app that can recognize text in your emails and let you send it to your other apps via Zapier. Weiber Consulting now has their form emails sent to Mailparser.io, which extracts the important data and sends it to Formidable with a webhook, which then sends a custom email to the potential customer based on the data entered. With a Zapier integration, it then sends a confirmation SMS to the customer, and adds the individual to MailChimp for follow-up messages.



All of that happens in not much more time than it'd take the email to show up on an agents inbox. "This entire process is done automatically in less than 3 minutes," Capone says. "Truly amazing."

#### Zaps:

- [Create New Mailchimp Subscriber from Mailparser Processed Email](#)
- [Send Twilio SMS when Mailparser receives a new email](#)

So even if your form's not yet integrated with Zapier, don't give up—find a workaround like Mailpaser.io or use the free Zapier [Email Parser](#) to pull data out of your form's emails, too.

## 12. Work with Everyone's Apps

It's hard enough making sure your form data is flowing to the apps your own team uses. Now, imagine trying to also integrate with every app your customers use. That's the problem that made online marketing firm [Pronto](#) start using Zapier with their forms.

"Since we work with over 1,000 clients who each use different SaaS apps to run their business, there's no way we could possibly maintain our own custom data integrations with over 100 systems," says Pronto marketer Pierre-Emmanuel Mol. Instead, they use Zapier, which makes it easy to connect the custom Gravity Forms they build for their clients with any apps they use.

As Mol says, "Thanks to Zapier, we can focus on on better managing our clients' websites rather than having to worry about how to send data from one system to another."

#### Zaps

- [Create Trello Cards via Gravity Forms](#)
- [Create Base CRM Leads from Gravity Forms](#)

- [Send Gravity Forms Submissions Into GoToWebinar](#)
- [Create Pipedrive Deals via Gravity Forms](#)

No matter which form you use, and which apps your clients rely on, chances are you can use Zapier to keep everything connected. And if the apps your clients use aren't already integrated with Zapier, you could add them via the [Zapier Developer Platform](#) or rely on RSS, database integrations, email notifications or use other features to [get them to work with Zapier](#).

## Build Your Own Startup

“Our dev team spent about three weeks trying to just get one form up; our design team did the same in just two days with JotForm.” Toufan Rahimpour, COO, [Logoworks](#)

Forms can be more than just a part of your business: they can *be* your business. You can build a prototype app, gather feedback from your demo site, run a crowdfunding campaign, and make internal tools to help your team, all with just a form. It might sound crazy, but your next great app idea might not need to be an app—it could be just a simple form.

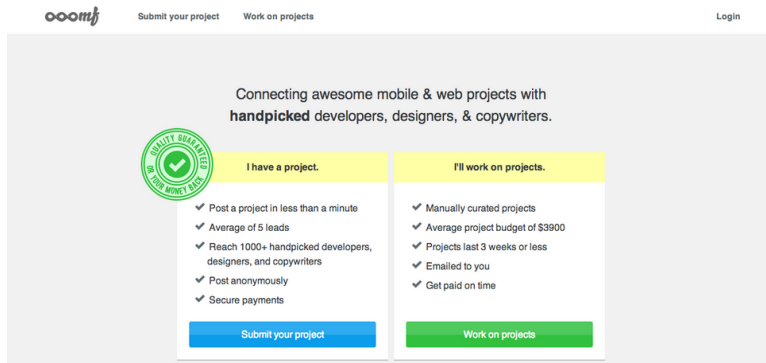
These stories are some of the neatest ways you could use a form, from teams who built their businesses without writing a single line of code.

### 13. Build a Minimal Viable Product

Launching a new business—or pivoting an existing one—is a lot of work. Even if your website is a major part of your company, you'll have so many other things to do that you might not have enough

time to make your site as perfect as you'd like. Plus, who knows—you might want to change something in a few weeks, so why set it in stone now?

When the Crew team realized they needed to pivot their company, they wanted a project that they could launch *immediately*. And so, a form was to be the basis of their new business. Crew was constructed as a tool that connects companies with designers and developers, and they quickly launched it with the help of two forms, Stripe, and MailChimp. Yup, that's it.



You'd never guess it's just forms behind the scenes

“As far as I know, no one ever commented on the fact that we were using a Wufoo form,” says Crew co-founder Luke Chesser when we asked him how the forms worked out for their team. “I thought for sure they wouldn't use it for payments, but I was proved overwhelmingly wrong there, since we racked up \$25,000 in payments through the system in the first three months.”

Zaps:

- Use Wufoo entries to create MailChimp subscribers
- Add Stripe sales to a Google Docs spreadsheet

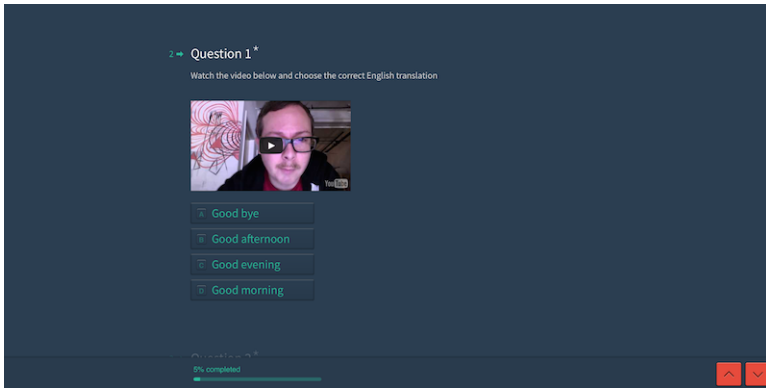
The Crew team says it's too easy to wait until you've built the perfect product and never actually *start building*. So don't do that. "Don't wait for everything to be perfectly figured out," advises Crew co-founder Mikael Cho. "If you start, you're already 90 percent ahead of the game and you'd be surprised how far you can get."

Crew eventually built their own app, after proving their concept with the original form. They've continued to experiment with new business ideas by just using simple, off-the-shelf products. Their latest project, stock photo site [Unsplash](#), was originally launched just with forms and a Tumblr blog before getting its own custom site when the concept proved itself.

There are so many business ideas that can be proved in the same way. You can start with just a form, build what you can, see how it works—and then go from there.

## 14. Prototype Apps

Last year, the Typeform team held a [hackathon](#) that was unlike any other. Most hackathons require all-night coding to make the next great app, but this one required just a form—since a form, on its own or linked to other apps, can be an app of a sort. The [Typeform Hackathon](#) produced all types of simple apps, from a [zombie game](#) to a tool that [teaches you Facebook's terms of service](#) to a simple [intro lesson to Japanese](#).



### Learn Japanese from a form

Sure, they might not be as full-featured as an app you'd actually want to download to your phone, but they're a great start—a prototype of something that could be even more powerful. That's why Typeform and JotForm forms are the Proto Banao team's go-to tool for prototyping new apps.

"We use Typeform to hack something together quickly so we can get the client and us on the same page faster," describes Proto Banao product designer [Sourabh Chakraborty](#). "Many of our client business apps are about taking data, pictures, payment transactions, etc., and it's very easy to create a Typeform, set logic to the questions/input fields, and create a workflow similar to a project's needs."

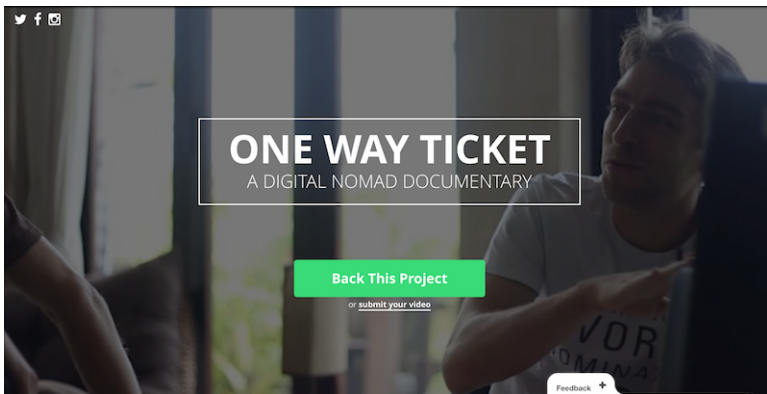
The same would work for your next great app idea. Once you're ready to move beyond pencil sketches, instead of reaching for a standard mockup tool try using a form to outline the basics of the app instead. You can then use Zapier to send push notifications and emails from the form, tie the form to Dropbox or Evernote to simulate a notes app, or use any of the hundreds of apps Zapier supports to add any extra functionality you need.

Odds are, you'll have a much better chance at selling your idea if it's already halfway built with a form. As Chakraborty says, "a near-live prototype of an idea thrills almost any client."

## 15. Raise Funds

One of the biggest challenges in starting a business is funding. If you can't secure an investment to start your business, then crowdfunding might be your best—and only—option. You can use tools like Kickstarter and Indiegogo, or you could build your own crowdfunding tool with a form.

Youjin Do did just that, using Typeform for the form, PayPal *and* Stripe for payments, Zapier to send emails and save backer data to a spreadsheet, and some custom coding to show how the funding is going on the project site.



### Crowdfunding without a platform

"I can customize anything what I want, I can make my funding schedule more flexible, and I can save fees as well," says Do. You can use the following Zaps and the [steps on her site](#) to create your own crowdfunding solution with just a form.

### **Zaps:**

- [Thank Paypal Sales via Automatic Emails](#)
- [Save Your PayPal Sales to a Google Docs Spreadsheet](#)
- [Add Subscribers to MailChimp via a Google Spreadsheet](#)

Whether you're raising funds, or have finished products you're ready to sell, a form that accepts payments is a great way to close the sale. Just add the standard form fields you need—including addresses if you need to ship the products—then add your form app's payment block. Make sure you've set up your payment provider (like Stripe or PayPal), and you'll be ready to sell your stuff.

You can also use Zapier to record the payment data in a spreadsheet or accounting app, notify yourself about the new sell, send the new customer a welcome message, and more.

### **Send an Invoice or Receipt**

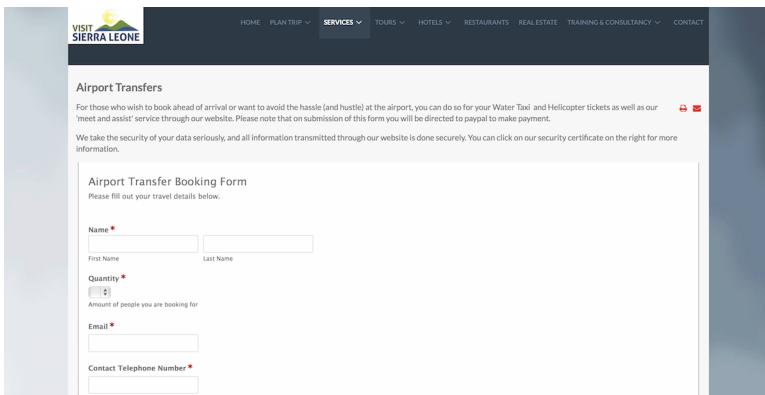
- [Create Personalized Receipts and Documents from PayPal with WebMerge](#)
- [Create New QuickBooks Online Customers From Your Device Magic Form](#)

### **Welcome Customers With an Email**

- [Send emails for new FormKeep submissions](#)
- [Send email notifications or follow-ups from new Typeform entries](#)
- [Send an email from Mandrill when your Formstack form is filled out](#)

## 16. Create Reservations

If you've ever scheduled an appointment online, I'm willing to bet you filled out a form. The [Visit Sierra Leone](#) team, for example, has an airport transfer and travel guide service, so they made a form for people to submit their arrival info.

The image shows a screenshot of the Visit Sierra Leone website. The page is titled "Airport Transfers" and contains a "Airport Transfer Booking Form". The form includes fields for "Name" (split into "First Name" and "Last Name"), "Quantity" (with a spinner), "Email", and "Contact Telephone Number". The website header includes navigation links for HOME, PLAN TRIP, SERVICES, TOURS, HOTELS, RESTAURANTS, REAL ESTATE, TRAINING & CONSULTANCY, and CONTACT. The form is set against a light background with a dark header and footer.

### Visit Sierra Leone's travel detail form

Whenever someone fills out the form, Zapier jumps into action, sending a confirmation email to the customer. Then, Zapier adds the new booking to Google Calendar, and sends an SMS message to their airport staff on the day of the booking with the arrival details.

“We have limited internet at the airport,” says Visit Sierra Leone founder Bimbola Carrol, “so this SMS notification means they get an instant notification of a pending arrival. This has reduced the chances of a client being ‘missed’ at the airport to virtually nil.”

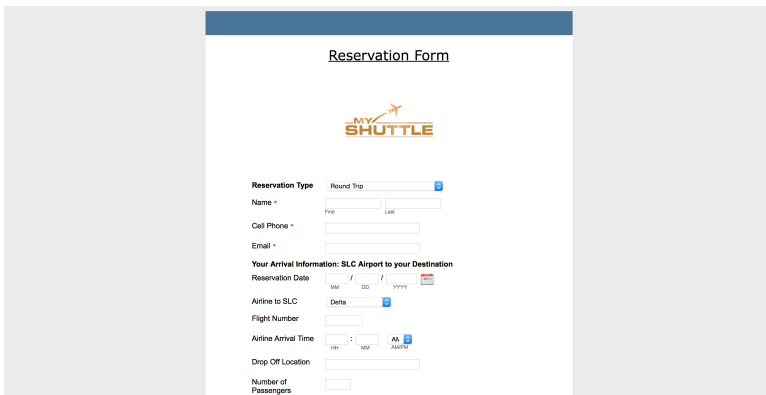
### Zaps:

- [Send a Gmail email when Formstack form is filled out](#)
- [Create Google Calendar events from Formstack form entries](#)



- [Send an SMS message from your Formstack form](#)

They're not the only ones. [My Shuttle in Park City, Utah](#) has a similar form with [123ContactForm](#) that lets customers book airport transportation. Customers can change their reservations, if needed, and Zapier lets the My Shuttle team see all reservations on a Google Calendar automatically. And, Zapier's filters come in handy, making sure reservations go to the right calendar.

A screenshot of a web form titled "Reservation Form" for "MY SHUTTLE". The form includes a logo at the top, followed by a "Reservation Type" dropdown set to "Round Trip". Below are fields for "Name" (with "First" and "Last" sub-fields), "Cell Phone", and "Email". A section titled "Your Arrival Information: SLC Airport to your Destination" contains a "Reservation Date" field with a calendar icon, an "Airline to SLC" dropdown, a "Flight Number" field, an "Airline Arrival Time" field with a time and AM/PM selector, a "Drop Off Location" field, and a "Number of Passengers" field.

### My Shuttle Park Utah's schedule form

"I used to manually enter reservations into my calendar but now I don't have to," says My Shuttle's Chad Lawrence. "There was always a chance for error when you manually put in reservations into the Google Calendar. But now there is no chance of that happening."

### Zaps:

- [Send a Gmail email whenever your 123ContactForm is filled out](#)
- [Add events to your Google Calendar from 123ContactForm](#)

No matter what type of service business you're running—lawn care, consulting, a barber shop, or anything else—you can use a form and Zapier to keep your automatically schedule maintained, while also notifying your customers and making sure the right data is ready for your team when they need it.

**Zaps:**

- [Automatically create events in Google Calendar from Wufoo form entries](#)
- [Create Google Calendar events from new Google Form entries](#)
- [Create Google Calendar Appointments From Device Magic Forms](#)

## Keep Your Company Going

“If you are having any issues maintaining and integrating web forms for your business, just stop what you're doing and take a look at Zapier.” Ben Ryerson, [Oldcastle](#) web developer

It takes a lot of busywork to keep a company running: copying data from this app, adding records to another app, making new accounts just to post something new. It's tedious, and unnecessary.

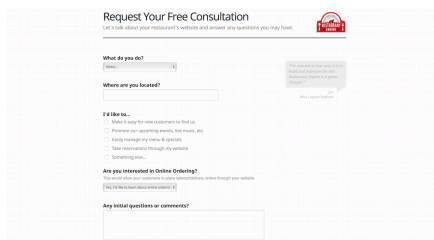
These teams have made forms that help them automate away the busywork, letting them onboard new customers, manage finances, and empower their partners with just a form.

## 17. Build Your Own Internal Tools

You can spend hours finding the [perfect CRM](#) or the best app to send [automated marketing messages](#)—or you could build your own

internal tools that work just like you want. All it takes is a way to collect data, somewhere to display the data, and Zapier to tie them together.

A form is the perfect tool for the first task, as Brian Casel found when [building his own sales CRM](#) for his startup [Restaurant Engine](#). He used Gravity Forms to gather info from potential leads, then immediately follows up by sending them an email course via MailChimp.

A screenshot of a web form titled "Request Your Free Consultation" with a Gravity Forms logo in the top right. The form includes a sub-header "Get 17 job offers your resume isn't a match and receive my guidance for free fast!". The form fields include: "What do you do?" with a dropdown menu; "Where are you located?" with a text input field; "I'd like to..." with three radio button options: "Schedule for new customers to find us", "Provide our existing menu, but needs an...", and "Make reservations through my website"; "Are you interested in Online Ordering?" with a link to "http://restaurantengine.com/"; and "Any initial questions or comments?" with a large text area.

### The form behind the CRM

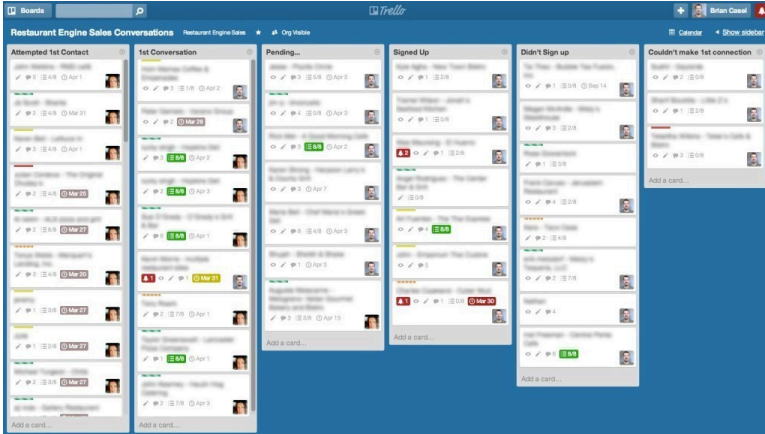
That's only the beginning. That same form also used Zapier to send all of the data to a specially formatted [Trello Card](#). The Restaurant Engine team will be able to see everything that's entered in the form, and the cards will automatically get a checklist of the next tasks that need done and a due date set three days for 3 days later.

### Zaps:

- [Send Gravity Form leads to MailChimp](#)
- [Create Trello Cards via Gravity Forms](#)

The team can then work together to contact potential clients, and move the Trello card through the different columns as they move through the sales process. Then, they've added integrations with [Help Scout](#) for sending emails, and use [Grasshopper](#) to route calls,

which gives them a full-featured custom sales CRM from just a form and a handful of other apps.



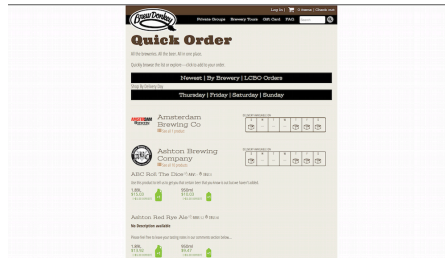
Trello turned into a [sales-focused CRM](#)

“There are a few things I plan to implement to help improve and optimize our system,” Casel says. “But instead of getting bogged down in these technical perfections, I decided to take a lean startup approach: Get this up and running quickly, learn, iterate, refine, and improve.”

Take that same approach with the tools your team needs, find unique ways to pull forms together with other apps, and you’ll find your “dream apps” aren’t so hard to make after all.

## 18. Add Product Listings to Your Site

Managing a large store is difficult. In addition to caring for your customers and shipping orders, you need to maintain your product listings and add new products as they become available.



Brew Donkey's product listings, added by their customers with a form

That's why the [Brew Donkey](#) team—a craft beer delivery service—decided to let their suppliers add new products to their store. They built a Typeform form, then connected it to [Shopify](#) with Zapier. That lets their suppliers add new beers to their Shopify store, without taking any of the Brew Donkey team's time.

- **Zap:** [Create new Shopify product listings from a Typeform form](#)

You could do the same with your own store. Just put together a form that gathers all the product info you'd need, and use Zapier to connect it to your store. You'll get updated content on your site without having to copy/paste submissions from your suppliers. They'll likely find it helpful, too, since they'll be able to get their products listed quicker.

### Zaps:

- [Create Shopify product listings from Wufoo form entries](#)
- [Create WordPress Posts From Device Magic Forms](#)
- [Create WordPress posts from your JotForm form](#)

And, with a bit more work, you could almost start your own eBay or Etsy competitor just with a form.

## 19. Onboard New Customers

Whenever someone buys your products or services, you'll want to make sure they understand everything about them. Depending on your products, you might want to send along a training course, instructional emails, or schedule a time to walk users through your product. It'll take time, so you'll want to automate onboarding as much as possible.

The [Ensuite Media](#) team does that with a 123ContactForm form to sign up new clients, and uses Zapier to automatically create tasks in [Asana](#) for their content, strategy, and graphics departments.

Then, they have an internal form that their sales team can fill out while they're on the phone with clients. Once it's filled out, it'll create Asana tasks and add clients to [QuickBooks](#) to make it easy to invoice them. "Its very easy and fast to onboard new clients that way," says Daniel Forman, Ensuite co-founder.

### Zaps:

- [Create tasks in Asana when your 123ContactForm form is filled out](#)
- [Create new customers in QuickBooks from a 123Contact-Form form](#)

Whether you need to send out documents, create tasks for your team, schedule an appointment, or anything else to onboard your customers, there's no reason to do it all manually. Just hook your form to the other apps you use, and let your team focus on your real work: interacting with customers.

## 20. Manage Finances

In addition to adding customers to your invoicing app, you can use forms and Zapier to manage your company's finances. The [Visit](#)

[Sierra Leone](#) team, for example, has an internal Formstack form linked to a Google Sheets spreadsheet for their finance officers to keep track of their cash and expenses. That way, they can quickly input current cash-on-hand or log new expenses from any device, and then have them automatically organized in a spreadsheet for accounting.

Best of all, with a bit of work you can get the spreadsheet to do a lot of the accounting heavy lifting for you. “With some logic and conditions, I am able to populate other sheets with only the one form,” says Visit Sierra Leone’s Carrol.

- **Zap:** [Add Formstack form entries to a Google Docs spreadsheet](#)

Whether you keep track of your finances in a spreadsheet or have a more advanced accounting app like [Xero](#) or QuickBooks, Zapier and your form can give you the freedom to make simple interfaces that let everyone on the team log expenses and more.

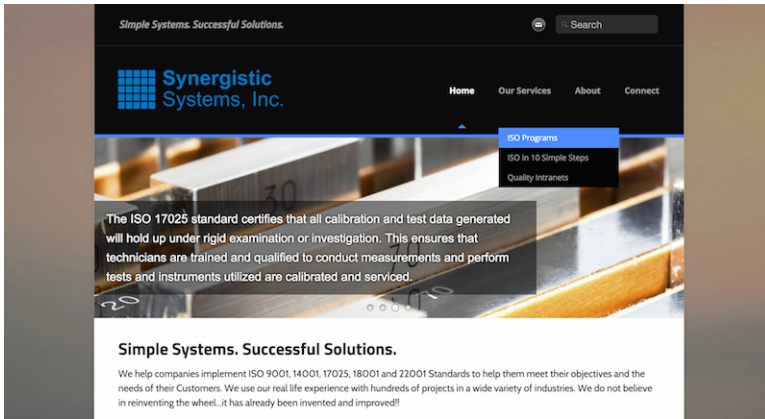
**Zaps:**

- [Create invoice in Xero from Wufoo form](#)
- [Add QuickBooks customer from Gravity Forms form entry](#)

## 21. Consolidate Feedback

Selling products and managing the cash you’re making isn’t the only thing your business will need to do. You’ll also want to know what people think of your products and services. That’s one of the few ways you’ll know what you need to improve or focus on.

[Synergistic Systems](#), an ISO standards consultant firm, uses a [Formdesk](#) form and a QuickBase database to make sure they never miss any customer feedback.



Even ISO compliance can be improved with a form

“Before using Zapier, when our Customer Satisfaction Surveys came in through Formdesk I would get an email with the data. I would then need to migrate the data manually (field by field) to create a record in the other database system,” says Ben Lane, systems engineer at Synergistic Systems.

Now, with a simple Zapier integration, all of their customer feedback is stored in the same database. “My job of manual entry is a thing of the past,” Lane says. Now he can focus on customers—and actually have time to work on improving their services.

- **Zap:** [Add Formdesk form entries to your QuickBase database](#)

Customer feedback can come from all types of places—not just your form—but Zapier can help you keep track of it together. You can link your form to a database or spreadsheet, then also link your Twitter mentions, feedback emails, and more with other Zaps, to help you get a full picture of your feedback.

**Zaps:**



- [Save Twitter mentions to a Google Sheets spreadsheet](#)
- [Save email data to a Google Docs spreadsheet](#)
- [Backup Your Google Docs spreadsheet to a MySQL database](#)

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## There's So Much More You Can Do

“I have actually enjoyed building these forms and finding new ways to make all this work for my business. Automagically.” Bimbola Carrol, Founder, [Visit Sierra Leone](#)

These two-dozen examples are only a sampling of the many ways forms are used by businesses around the world. You can make a form to collect, automate, and organize almost any type of data you want—just break down your need into parts, put them together in a form, and then use Zapier to connect with the apps where you need to take action.

You'll get a tool that's specialized just for your needs, without spending the time or money to build a custom hand-coded solution. Heck, you might even have *fun* building your own form-powered tools!

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Now that we've explored the best form apps, hidden form features you should be using, and ways to automate your forms, it's time to move on into the world of surveys. Forms are great for gathering all types of data, but if you want to know what your audience is thinking and get their opinions on what your company should do next, you'll want a survey.

Surveys can be confusing, though, so in Chapter 6 you'll find a guide to [the best ways to build a survey](#), the question types to use, and the common survey pitfalls to avoid. You'll then be ready in Chapter 7 to find [the perfect survey app](#) and integrate your survey builder into your workflow.

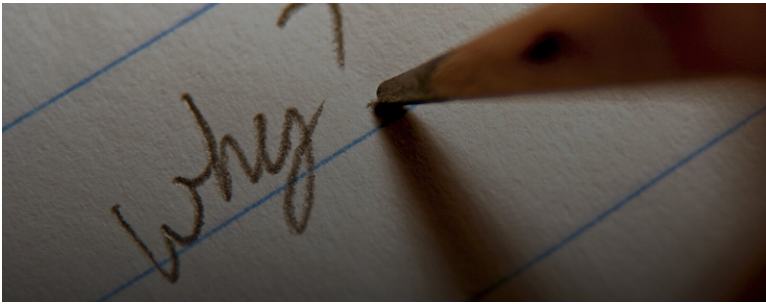
**Need more apps for your team?** Check out our free eBooks about [CRM apps](#) and [Email Marketing apps](#), both of which include roundups of the best apps and tips on how to use them in your business.

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*Written by Zapier Marketer [Matthew Guay](#).*

*Image Credits: Crane photo by [Pedro Moura Pinheiro](#) via [Flickr](#).*

# Chapter 6: Surveys 101: A Simple Guide to Asking Effective Questions



When you have a question about your business—which new product to offer, what new features and services to add, where to open your next location—there’s only one obvious way to find out: a survey. It’s like magic: you put together questions, ask your followers and fans, and *voilà*, you know what to do next.

Surveys seem so simple, but they rarely are in real life. Slightly vary the types of questions and response options in your survey, and you can seriously impact the quality and value of your survey’s results.

Bad results can lead to bad decisions—the very thing you set out to avoid by making a survey in the first place. Ask the wrong questions, or ask them in the wrong way, and you’ll end up with products and services no one wants.

That’s why thoughtful survey design is so important. It’ll help you get better, trustworthy results. Here are some tips on how to build an effective survey, starting with the one thing that’s most important in a survey: questions.

- 
- Surveys: Where to Begin
  - Getting Answers: Survey Question Types
  - 6 Best Practices for Writing Survey Questions
  - Watch Out for These Survey Pitfalls
  - Tips on Survey Format
- 

## Surveys: Where to Begin

It's easy to begin the survey writing process by brainstorming a list of questions to ask. Your head's full of questions you're dying to ask your customers, and it'd be so easy to type them out in a survey app and call it a day.

But that's far from the best way to start. Instead, you should begin your survey building process by brainstorming the *answers* you want. You want actionable feedback, and you'll be most likely to get that by thinking through the exact answer you want. This could be a simple answer (perhaps "*Our customers want us to offer THIS flavor of soda*") or a more complicated hypothesis you want to prove (such as "*Concern about social status is/is not correlated with social media usage.*").

So sit down, and think through what you want to learn from your survey. Write down each answer you want, with a blank in the spot of the thing you want to learn—the flavor of soda to offer, the feature people are missing, or the correctness of a statement. Once you've completed this exercise, use the list to build questions for your survey.

Starting with a list of answers and turning them into survey questions will ensure you include all of the questions you need,

and word them in a way that will get effective answers. It will also prevent you from inflating your survey with questions that don't matter.

Just like you start a building project with blueprints—and don't just begin pouring concrete whenever you decide you want a new building—your survey should start with the answers you need, and then you'll be better prepared to make the questions that will provide those questions.

## Getting Answers: Survey Question Types

As you're turning your answers into questions, you'll need to think about what type of questions you need to ask. Surveys aren't just about yes and no questions—you'll find dozens of question types in most survey apps. It can quickly get confusing which type of question you should use for each answer you need.

The type of question you use will affect the answers you get and the kinds of analysis you can do. Here are the most common types of questions you can use in a survey, along with examples of the type of data you'll collect with each.

### Categorical Questions

If you're looking for a simple count, like “35% of people said ABC” or “20% of men and 24% of women...” then there's a variety of question types you can use: Yes/No, checkbox, or multiple choice question type. These types of questions are also called “nominal” questions.

Analysis of categorical-level questions can include counts and percentages—“22 respondents” or “18% of customers”, for example—and they work great for bar graphs and pie charts. You cannot take averages or test correlations with nominal-level data.

### **Yes/No**

The simplest survey question—and the only question you’ll usually use in a poll—is a Yes/No question. You’ll ask a question, then have two options: *Yes* and *No*. Your survey app likely offers a Yes/No question; otherwise, use the multiple choice question and add Yes and No answers yourself.

**Example:** *Are you a vegetarian?* Yes/No

### **Multiple Choice**

Need more nuance than a Yes/No answer gives? Multiple choice is what you need. You can add as many answers as you want, and your respondents can pick only *one* answer to the question.

**Example:** *What’s your favorite food?* Pizza/Pasta/Salad/Steak/Soup/Other

### **Checkbox**

Have a multiple choice-type question where you think some people will want to choose more than one option? Checkbox questions add that flexibility. Add as many answers as you want, and respondents can pick *as many* answers to the question as you want.

**Example:** *Which types of meat do you like?* Beef/Pork/Chicken/-Fish/Duck/Other

### **Ordinal Questions**

When question responses have a clear order (like “Income of \$0-\$25K, \$26K-40K, \$40K+”), we call them “ordinal” questions. You could collect ordinal data with Multiple Choice questions, or you could use drop-down or ranking questions.

Analysis for ordinal questions is similar to analysis for nominal questions: you can get counts and percentages. You cannot find

averages or test correlations with ordinal-level data.

### ***Drop-down***

Drop-down questions work much like a multiple choice question—you'll have several different possible answers, and respondents can only choose *one* option. But you'll need to list the answers in order—perhaps largest to smallest—for ordinal data. You could also use this question to gather demographic data like their country or state of residence.

**Example:** *What's your household income?* \$0-10k/\$10-35k/\$35-60k/\$60k+

### ***Ranking***

A more unique survey question type that you won't find in every survey app, ranking questions let you list a number of answers and respondents can rearrange them *all* into the order they want. That way, they can give feedback on every answer you offer. It's a great way to see which items people like most and least at the same time.

**Example:** *What's your favorite beverages? Rank in order of preference.* Milk/Water/Juice/Coffee/Soda/Wine/Beer

## **Interval/Ratio Questions**

For the most precise data and thorough analysis, use the interval or ratio question type. These questions allow you to conduct advanced analysis, like finding averages, testing correlations, and running regression models. You'll use ranking scale, matrix, or text fields in your survey app to ask these type of questions.

Interval questions are questions that are often asked on a scale of 1-5 or 1-7, like from "Strongly Disagree" to "Strongly Agree" or from "Never" to "Always." Ratio questions have a true zero and often ask people to input an actual number into the survey field (like How

Many Cups of Coffee Do You Drink Per Day? \_\_\_\_”) You don’t really have to worry about the differences between the two types.

### **Ranking Scale**

The default choice for interval questions, ranking scale questions look like a multiple choice question with the answers in a horizontal line instead of a list. There will likely be 3 to 10 answers, either with a number scale, a like/love scale, a never/always scale, or any other ratio interval. It’s a great way to find a more precise measure of people’s thoughts than a Yes/No question could give.

**Example:** *On a scale of 1-5, how would you rate our store cleanliness? 1/2/3/4/5*

### **Matrix**

Have a lot of interval questions to ask? Use a matrix if your survey app includes it. You can list a number of questions in a list, and use the same scale for all of them. It simplifies gathering data about a lot of similar items at once.

**Example:** *How much do you like the following: oranges, apples, grapes? Hate/Dislike/Ok/Like/Love*

### **Textbox**

For ratio questions—or direct feedback, or personal data like names—you’ll need the textbox question. There’s usually a small and large textbox option, so choose the size that’s appropriate for the data you’re collecting. You’ll add the question, and then there will be a blank where your respondent can enter their answer on their own.

**Example:** *How many apps are installed on your phone? Enter a number: \_\_\_\_\_*



## 6 Best Practices for Writing Survey Questions

Now that you have a list of the answers you're looking for, it's time to start writing questions for your survey. You know you want to pick a new flavor of soda to offer, so you immediately start typing:

“We know you love ABC Soda, and so we want to make a new drink you'll love. We've thought about offering Watermelon or Potato Chip flavored soda, but wanted to ask you first. So, which flavor of soda would you like to see us offer, and what size of bottles would you like to buy it in?”

Nope. That's not going to work. Before you write pages full of detailed questions, you'll need to remember to follow these tips to build effective survey questions:

### 1. Use Simple, Direct Language

Avoid using big words, complicated words, and words that could have multiple meanings. Your question should be short, simple, and clear.

### 2. Be Specific

Some concepts may mean different things to different people. Try to be as specific as possible when you ask questions. For example, instead of asking “Do you exercise regularly?” you could ask “How many days per week, on average, do you exercise?” This gives you a more precise, objective answer.

### 3. Break Down Big Ideas into Multiple Questions

Another way to deal with broad concepts that mean different things to different people is by breaking them down into multiple, more tangible questions.

“Customer satisfaction” is a common topic that businesses want to explore, and it’s a big question packed with smaller ideas. Instead of asking “*How Satisfied Are You with This Product?*”, you could instead ask people to give their opinion on three separate statements (asking them to weigh in on a scale of “Strongly Disagree” to “Strongly Agree”):

I enjoy using this product. This product meets my needs. I would purchase from this company again.

Customer Satisfaction Survey						
1. Please rate how strongly you agree or disagree with each of these statements.						
	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A - I haven't used the product.
I enjoy using this product.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This product meets my needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would purchase from this company again.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Break down big concepts into separate questions.

The individual statements provide insight into different pieces of your business, and the average of the scores give you a general measure of satisfaction that you can track over time and try to improve. Together, the three questions give you a precise, actionable answer to the question of customer satisfaction.

For another simple way to survey customer satisfaction, check out our [guide to the Net Promoter Score](#).

Marketing scholars have developed many series of questions (called “scales”) that together measure broad concepts (known as “constructs” in the research field) like customer satisfaction. One of the best collections of these marketing scales is [The Marketing Scales Handbook by Dr. Gordon C. Bruner](#), a must have for any serious market researcher with questions for constructs like customer satisfaction, brand affinity, and more. Or, for a simpler option, you’ll find pre-made constructs in many survey apps such as Survey Monkey’s [Question Bank](#). Rather than try to come up with your own questions, you can use these questions that have already been determined to be statistically valid.

## 4. Avoid Leading Questions

Sometimes, researchers’ opinions can seep into survey questions, subtly encouraging respondents to answer in a certain way and compromising survey results.

For example, asking “*Do you think the school should cut the gym budget to pay crossing guards?*” would likely prompt a different answer than asking, “*Should the school employ crossing guards to protect our children?*” even though both questions are related to the same topic.

To avoid leading questions, ask a friend or colleague to review your survey for any questions that seem like they have a right or wrong answer. If your friend can guess what kind of answer you’re looking for, consider rewriting the question. The answer may even be in splitting the question into multiple questions—a great option for the example question.

## 5. Ask One Thing per Question

Each of your survey questions should ask one thing, and one thing only. It seems simple enough, but many survey writers fall into the

“double-barreled” question trap. For example, “*Do you eat fruits & veggies on a daily basis?*” can actually be a hard question to answer. What if somebody eats just fruits or just veggies? There’s not a clear way for them to answer this question. A better option is to split the question into two separate ones.

You can check your survey for double-barreled questions by looking for words like “and” or “or” in your questions.

## 6. Use More Interval Questions

One simple way to take your survey from good to great is by changing your Yes/No and multiple choice questions to interval questions. Make a statement, and ask people to answer it on a 1-5 or 1-7 scale, like “Strongly Disagree, Disagree, Neither Agree nor Disagree, Agree, or Strongly Agree.” You’ll instantly upgrade the level of analysis you can perform on your results.

Researchers use scales of 1-5 or 1-7 because they do a good job capturing variation in answers, without causing information overload for the respondent. It may seem like using a scale of 1-100 would help you capture really detailed answers, but it actually causes respondents to answer 0, 50, or 100—their answers tend to migrate around extremes or the center. Using a scale of 1-5 or 1-7 will help you get more accurate, nuanced answers from respondents.

Then, instead of looking at each question individually, like most people do, you can add on another layer of analysis by looking at how questions relate to one another. When you ask interval questions, you open the door to check [correlations](#), which allow you to say “People who are more likely to ABC are less likely to think DEF.” If you’re a statistics whiz, you can run a [linear regression](#) and say “Factors G, H, and I have the biggest impact on J.” More simply, you can take averages and say things like “Junior employees, on average, exercise more often than senior employees.”

## Survey Pitfalls to Avoid

Once you've written your survey questions and responses, it's time to make sure you haven't fallen victim to the following pitfalls.

### Bias

Survey response bias is a sad but important reality to consider when writing surveys. Asking for information like gender, race, or income at the beginning of a survey can influence how people respond to the rest of the survey. (This is also called [stereotype threat](#).) For example, studies have shown that when girls identify their gender before a math test, they perform worse on the test than girls who aren't asked to identify their gender.

Most survey writers prevent bias and stereotype threat by asking sensitive questions—including those about gender, race, and income—at the end of surveys.

Bias can happen on a smaller scale, too. Asking someone “How important do you think content marketing is?” followed by “How much do you plan to invest in content marketing next year?” could lead to bias. If someone says they believe content marketing is very important, they may inflate the dollar amount they plan to spend in the next question. Randomizing question order is a simple way to prevent this type of bias.

Bias can also happen when you interpret the survey. Without even knowing it, you might treat one person's opinion differently simply because of their demographic answers. In some cases, you might not want to gather any demographic data at all to create a totally anonymous survey, something common in academic research.

## Framing

The wording used in survey instructions about why a survey is being conducted can impact the way respondents answer questions. For example, framing a customer service follow-up survey as an evaluation of a team member may prompt respondents to be more positive than if you framed the survey as a tool to improve your processes.

Asking “*Did John solve your problem well?*” may encourage more positive answers since respondents are being asked about a specific, real person. But you want high quality answers, so asking “*Did we solve your problem today?*” is a more neutral way to phrase the same question.

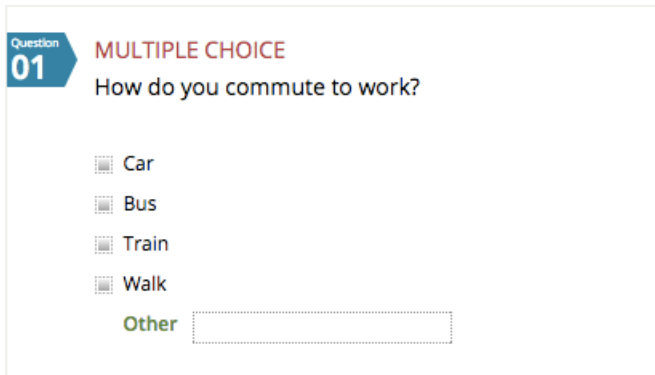
People have a tendency to want to help. If you tell them that the survey has a goal, they may answer questions in a way that helps you achieve that goal, instead of answering the questions totally honestly. To prevent this, try to be neutral when you describe the survey and give instructions.

## Incomplete Options

When questions are asked on a scale (like from “Strongly Disagree” to “Strongly Agree”), respondents can get frustrated if there’s not a Neutral option. Neutral options are usually handled two ways: giving respondents a “Neither Agree nor Disagree” option in the middle of the scale and giving them a “N/A” option at the end of it, in case the question does not apply.

Respondents can also get frustrated with your survey when it forces them to answer questions in ways that aren’t true. For example, if you ask “What’s your favorite food?” and only provide pizza, cheeseburgers, and burritos as options, people who love chicken nuggets don’t have a clear answer choice. An easy way to get

around this is to provide an “Other” option and make the question not required.



Question 01 MULTIPLE CHOICE

How do you commute to work?

- Car
- Bus
- Train
- Walk
- Other

Always give users an ‘Other’ option.

An even better solution is to make sure you’re providing robust answer choices by pre-testing your survey and allowing respondents to brainstorm answer choices you may have missed. (You could also rewrite the question to not require as precise of an answer.)

## Tips on Survey Format

Keep your survey as short as you can by limiting the number of questions you ask. Long surveys can lead to “[survey fatigue](#).” When survey fatigue hits, respondents either quit the survey or they stop paying attention and randomly check boxes until it’s complete. Either way, your data gets compromised.

Putting together your ideal “list of answers” before you write your survey will help you make sure to only include the questions that need to be asked. Compare the questions you’ve written to that list

of answers. If there are any unnecessary or extra questions, remove them from the survey.

Here are a few more tips for formatting your survey to avoid survey fatigue and get meaningful results:

## **Break the Survey into Multiple Pages**

If your survey does get long, consider breaking it into multiple pages. Respondents will be less overwhelmed when they look at it. Be careful, though, because having too many pages can also cause survey fatigue. You'll have to strike a balance between page length and number of pages.

## **Show a Progress Bar**

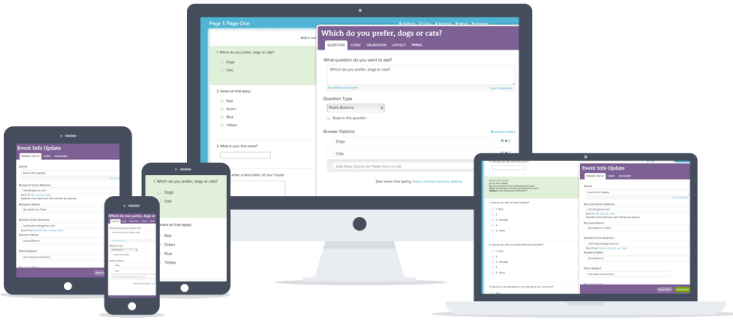
One of the easiest ways to keep people motivated as they move through your survey is to show a progress bar and give a time estimate. Enabling progress bars is pretty easy in most survey apps.

## **Make Sure Your Survey Works on Multiple Devices**

If respondents will be using a variety of devices to take your survey, be sure to choose an app that's responsive or that has desktop and mobile versions. When you're thinking about what devices your respondents may be using, think about when and where they'll be taking the survey (from work, from home, etc.).

Most [survey apps](#) today look great on mobile, but be sure to preview your survey on your phone and computer, at least, to make sure it'll look good for all of your users.





Make sure your survey looks good on the devices your respondents will be using. (via SurveyGizmo)

## A Final Tip Before You Begin

You've created questions to find the answers you need, picked the perfect question type, and learned the things to avoid and the best ways to format your survey. Now, you're ready to fire up your survey app—or [find a new survey builder](#) if you don't have one already—and start making your survey a reality.

But don't share your survey with the world. Not just yet. Instead, it's time to pre-test it. Pre-testing will help identify unclear questions, badly-worded responses, and more before you send your survey out to your respondents, and will give you a chance to improve your survey and its chances of generating actionable feedback.

To pre-test, send your completed survey to a few different people and ask them to tell you about any questions that seemed unclear or any problems they found. If you can, sit down with at least one or two people while they take the survey and listen to their reactions and feedback as they go. You'll often hear things like "*I'm not sure how to answer this*" or "*Wow, this is **really** long,*" which are clues that you have some revisions to do.

After it's been pre-tested, take the time to review the results of your survey from your testers. This data isn't meaningful for your survey, but it can be helpful to make sure everything's working correctly. Make sure nothing has gone wonky with measurement and that you're getting the types of data you expected.

No matter how much thought and hard work you put into creating your survey, it's going to have flaws—and that's okay. No survey is perfect, but investing time and thought into planning and writing will bring you much closer to getting the answers you need. And that's the ultimate goal—the survey's only a tool to get you there.

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Now that you've got the basics down on building your survey, it's time to pick an app to build your survey. Chapter 7 will show you [the best features in over 20 popular survey tools](#), along with tips on how to integrate your survey builder into your workflow.

Then, in Chapter 8, you'll find more advanced tips on building a great survey and [analyzing your survey data](#) from our in-house data scientist.

**Related:** Check out our [guide to collecting customer feedback](#) for more great ideas on getting ideas from your audience.

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*Written by freelance writer [Stephanie Beadell](#) with contribution from Zapier Marketer [Matthew Guay](#).*

*Image Credits: "Why?" photo by Eric via [Flickr](#)*

# Chapter 7: The Best Online Survey Builder Tools



Ask one person for advice, and it's hard to know whether we should trust them. Ask a hundred, though, and you'll see a clearer picture start to come together.

That's democracy, or the more modern term *crowdsourcing*, and it's one of the best ways to gather insight. Whether you're designing a new product, improving your site, or just seeing if more people like oranges than bananas, your best bet is to ask people. A lot of them. To do so, you'll need a survey.

We researched the most powerful web-based software that you can use to build surveys, so you can quickly find an app to start asking the important questions. No matter what type of info you need to gather, these are the best 20 survey apps for the job.

**Need a Form App instead?** Jump back to Chapter 2 to find the [14 best online form builders](#).

## The Best Survey Apps

The screenshot shows the SurveyMonkey website interface. At the top, there is a breadcrumb trail: Zapbook > Apps > SurveyMonkey > SurveyMonkey Review, Pricing & Features. The main header features the SurveyMonkey logo and the tagline 'Create Surveys, Get Answers'. Below this, there are three columns of benefits: 'Send your survey online anywhere, anytime', 'Send your survey and collect responses', and 'See your results in real-time'. A prominent orange button says 'Sign Up for SurveyMonkey'. Below the main content, there are three smaller screenshots showing different survey designs. At the bottom, there are two sections: 'SurveyMonkey Features' and 'SurveyMonkey Pricing'. The features list includes: 'Create surveys easily with over 180 survey templates, 1,600 pre-made questions, and a drag-and-drop designer', 'Image and video questions', and 'Audience Collector to pay for rapid survey responses'. The pricing section lists: 'Free for unlimited surveys with up to 10 questions and 100 responses', and '\$26/month Select plan for unlimited questions, 1,000 responses, custom design, filters, logic, and exports'. A 'Get help' button is located at the bottom right of the pricing section.

SurveyMonkey Features

- Create surveys easily with over 180 survey templates, 1,600 pre-made questions, and a drag-and-drop designer
- Image and video questions
- Audience Collector to pay for rapid survey responses

SurveyMonkey Pricing





















- Free for unlimited surveys with up to 10 questions and 100 responses
- \$26/month Select plan for unlimited questions, 1,000 responses, custom design, filters, logic, and exports

Get help

Picking a survey app that fits your team’s needs can be difficult. Any survey app worth its salt includes standard tools to gather info from your contacts, and a way to analyze the data you collect.

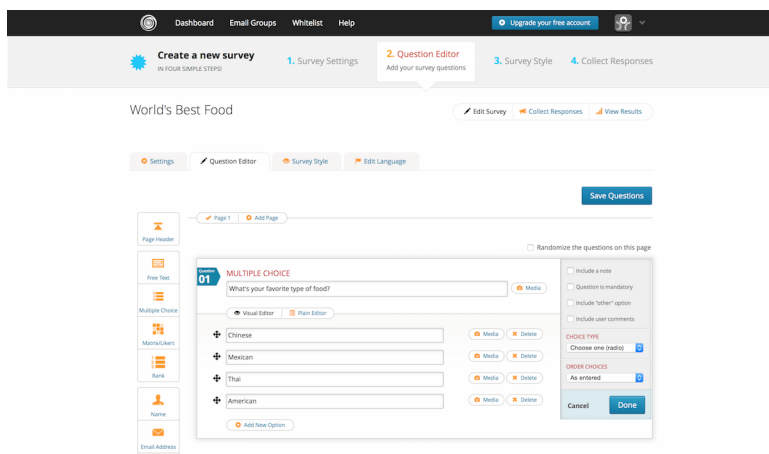
The apps on this list offer more than that. They help you tackle advanced techniques, like gathering images, recording audio, integrating with calendars, and crafting questions that get unbiased answers. Some are best online, while others shine in mobile apps or in offline world on a clipboard—it’s true, several of these survey apps allow you to print out your questionnaire, then add the results to the app. This roundup focuses on survey tools offering standout features, with an emphasis on apps that make it easy to get started.

We’ve ordered the apps based on how much they offer for free. Then, along with a quick review of each app and links to further pricing and product information, we’ve included an overview table to help you quickly compare the tools.

App	Best for:	Free for:	Plans from:
 PollDaddy	unlimited poll and survey responses	Unlimited responses	\$29/mo.
 Survey Nuts	free surveys without an account	Unlimited responses	—
 SurveyPlanet	fast survey answers	Unlimited responses	\$20/mo.
 SurveyLegend	responsive surveys	3 surveys; unlimited responses	\$19/mo.
 SurveyMethods	event registration in surveys	500 responses	\$9/mo.
 Survs	quickly adding questions	200 responses	\$19/mo.
 FreeOnlineSurveys	quickly making a new survey	150 responses	\$19.99/mo.
 SurveyMonkey	getting unbiased responses	100 responses	\$26/mo.
 QuestionPro	location based surveys	100 responses	\$12/mo.
 SmartSurvey	collaborating on survey questions	100 responses	\$40/mo.
 Surveypal	creating multi-page, multimedia surveys	100 responses	\$40/mo.
 FluidSurveys	fast editing	100 responses	\$70/mo.
 QuickTapSurvey	offline surveys	50 responses	\$19/mo.
 Obsurvey	simple surveys	—	\$12/mo.
 Survmetrics	photo-powered surveys	200 entries total	\$20/mo.
 PopSurvey	answering survey questions one at a time	—	\$24/mo.
 SurveyGizmo	testing your surveys	—	\$25/mo.
 LoopSurvey	gathering survey responses on mobile devices	—	\$25/mo.
 Client Heartbeat	surveying your customers	—	\$39/mo.
 LimeSurvey	self-hosted surveys	100% Free	—

## Polldaddy

*for unlimited poll and survey responses*



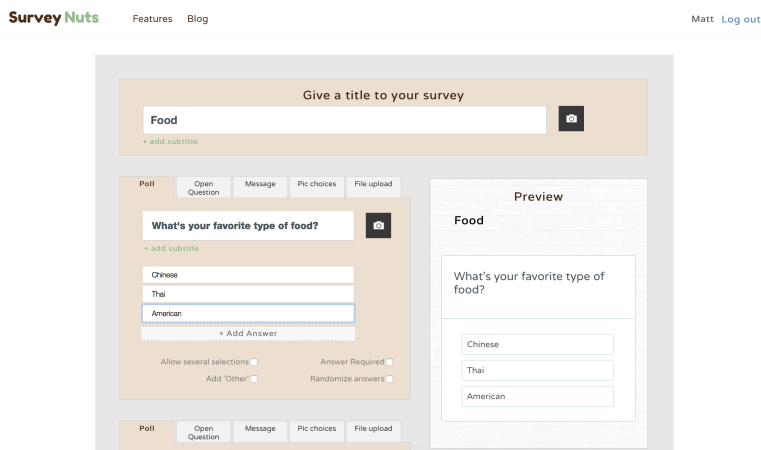
Yes, “poll” is in the name, but [Polldaddy](#) is also great at making surveys. It’s also among the most affordable survey tools, with unlimited surveys and responses for free. Polldaddy’s survey editor is nice, with options to embed media from YouTube, Flickr, Google Maps and more. You can receive your responses via email or RSS and set a date or entry quota to automatically close your survey automatically after it reaches that number.

It’s integrated with [WordPress](#)—and developed by Automattic, the company behind WordPress.com—so your surveys will look great on your blog, too, and you’ll use your WordPress.com account to sign up for an account. That’ll get you all of Polldaddy’s base features for free; all you’ll miss out on are custom CSS, report filtering, and similar pro features—but even those are reasonably priced for unlimited responses.

**Polldaddy Pricing:** Free for unlimited responses; from \$29/month [Pro account](#) for custom CSS, custom redirects, report filtering, and more

## Survey Nuts

*for free surveys without an account*



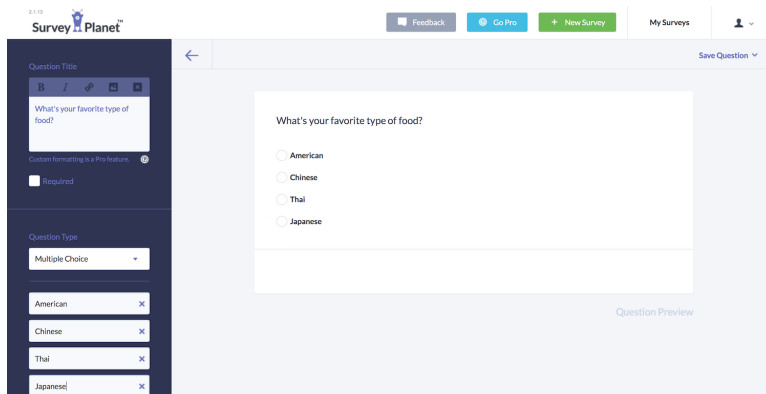
You already know what questions you'll ask, so it can be annoying to be required to first sign up for an account and then figure out where to get started before you can actually make your survey. [Survey Nuts](#) takes that frustration away by letting you make your survey right on the site's landing page, without even creating an account.

Survey Nuts starts you out with three blank questions, which you can fill in and customize, then add more questions if you need. Add your email address at the bottom, and Survey Nuts will save your survey, create an account for you, and give you a link to share your survey. It's one of the quickest ways to publish a survey.

**Survey Nuts Pricing:** Free; Paid plans with additional features coming soon

## SurveyPlanet

*for fast survey answers*



Tired of tapping a “+” button to add more answers to your survey questions? [SurveyPlanet](#) takes away that pain by automatically adding a blank answer spot as soon as you type an answer in the last blank field. You can tap and type as many times as you need to enter all your answers. Then, you can duplicate your questions in a tap to reword them for detailed branched surveys easily.

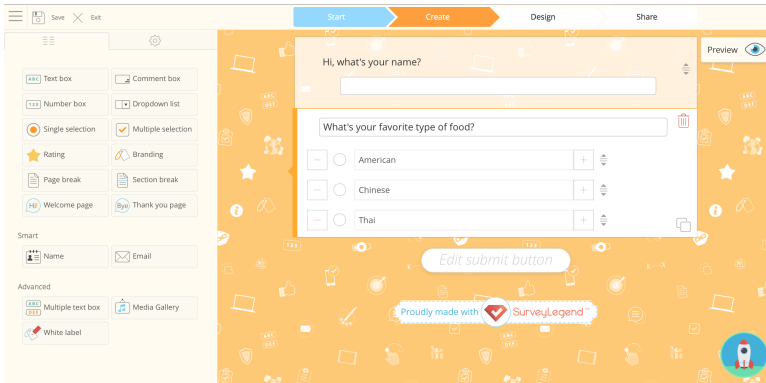
If you’re wondering what it’ll feel like to take your survey, SurveyPlanet’s preview mode is just what you need. It’ll show a live copy of your survey that you can fill out, right from the same window where you’re editing your survey. You can have the answers display one at a time or in a list—and if you choose the former, expect to be surprised at how quickly they load. It’s a fast survey tool that’ll help you get answers quickly.

**SurveyPlanet Pricing:** Free for unlimited surveys and responses; \$20/month Pro plan for CSV exports, printable surveys, branching questions, and custom branding

## SurveyLegend

*for responsive surveys*





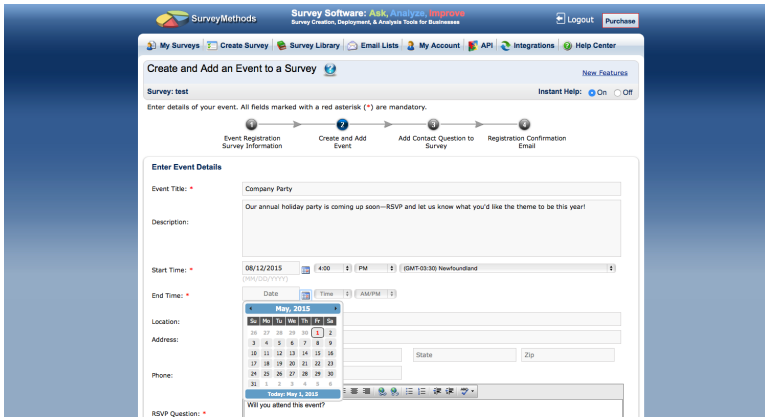
Surveys shouldn't be tied to desktops and laptops. Odds are, your audience fills out your survey on the go. And you might even find yourself wanting to throw together a new survey on your tablet. **SurveyLegend** is ready for all of that—it's a survey builder that's equally at home in your traditional browser or a tablet, and the surveys it creates will look great everywhere.

Its drag-and-drop editor is touch-ready, so you can put together a survey from any device. There are standard survey elements you'd expect, each with large buttons that are easy to tap on mobile. And, you can include a media gallery in a question, where you can use large images as questions to let people pick a graphical option in your survey—perhaps to say which food looks most tempting.

**SurveyLegend Pricing:** Free for 3 surveys and unlimited responses; from \$19/month **Pro plan** for 20 surveys

## SurveyMethods

*for event registration in surveys*



When you're planning an event and need people to RSVP, you might first think of using a more flexible form builder to make a signup form. [SurveyMethods](#), though, thinks a survey is the perfect thing for the job. With its “Event Registration” surveys, you can schedule an event, get information from your contacts about their thoughts on the event (what food they'd like, location suggestions, and more), then close the survey with a calendar invite and email confirmation to make sure everyone remembers to come and you know who's coming.

SurveyMethods can also help you make traditional surveys, with its survey library or an editor where you'll add one question at a time. You can gather responses anonymously, if you need, or print your survey and poll people at your events or stores. Or, you can import your email marketing list, and use SurveyMethods to send your survey to everyone at once.

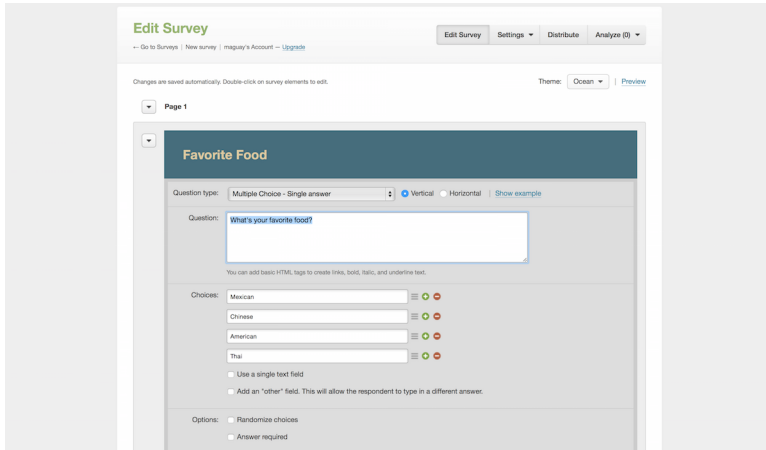
**SurveyMethods Pricing:** Free for unlimited surveys with up to 500 responses; from \$9/month [Advanced plan](#) for unlimited responses

*For a deeper look at SurveyMethods's features and pricing, check out our [SurveyMethods review](#).*

*See [SurveyMethods integrations](#) on Zapier*

## Survs

*for quickly adding questions*



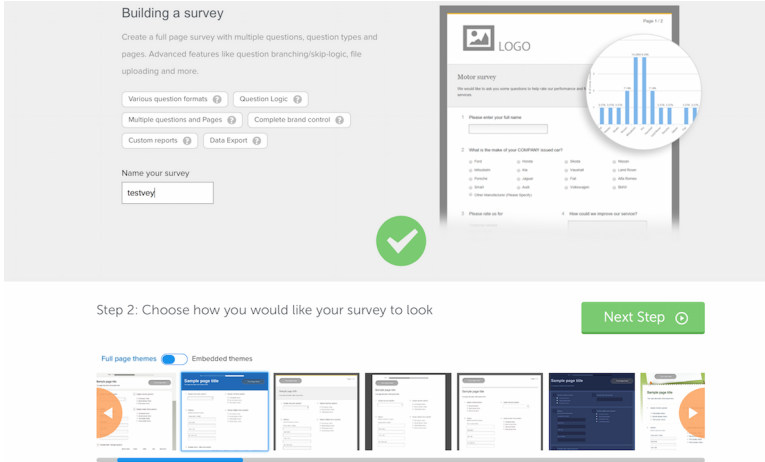
Tired of looking through a list of question types to find the format you need? **Survs** makes this part simple. After adding a new question by clicking the “+” button, you can immediately start typing your question under the ones you’ve already added. If you want a multiple-choice question, there’s fields for your answers already visible, so you can start typing in the answers. Otherwise, select the question type you’d like, and then add the answers.

There are also color-based themes, so you can customize your survey without having to dig in too deep. And, there are extra question options like random ordering and logic rules that you can add to each question right as you’re typing it in. It’s a simple way to make a survey by only thinking about the questions you want to ask.

**Survs Pricing:** Free for unlimited surveys with 10 questions and 200 responses per survey; from \$19/month **Basic plan** for unlimited questions and 2,000 responses per survey

## FreeOnlineSurveys

*for quickly making a new survey*



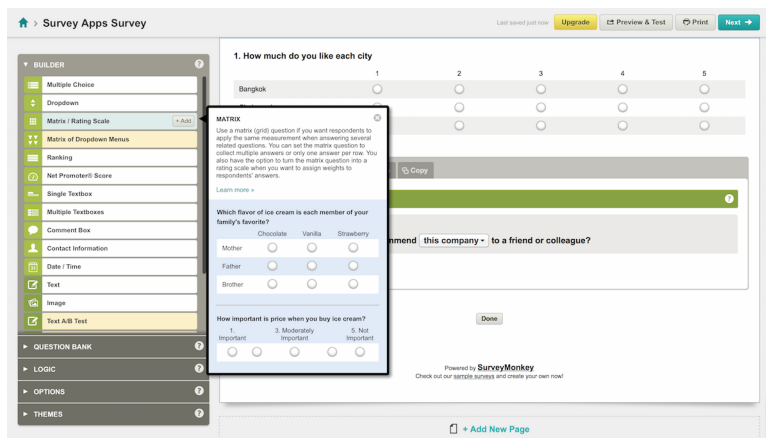
You'd think the *Free* in [FreeOnlineSurveys](#) would be the most interesting thing, but actually it's [FreeOnlineSurveys](#)' landing page that makes it worth checking out. You'll pick if you want to make a survey, quiz, poll, or form, then can immediately fill in your survey title, pick a theme, and preview how it'll look. If you like it, you can then sign up for an account and immediately dive into adding your questions.

If you're making a multi-page survey, you'll also find [FreeOnlineSurveys](#)' tabbed interface handy. You can switch back and forth between survey pages, without waiting for anything to load. And, if you happen to also make quizzes, forms, or polls often, building them all in [FreeOnlineSurveys](#) is a simple way to keep everything together.

**FreeOnlineSurveys Pricing:** Free for unlimited surveys with up to 20 questions and 50 responses per 10 day period; from \$19.99/month [Extra plan](#) for up to 1,000 responses

## SurveyMonkey

*for getting unbiased responses*



As one of the biggest names in survey apps, [SurveyMonkey](#) offers more than just a tool to arrange your questions and gather answers. It also includes templates and pre-written questions that are designed to help its users get accurate answers and unbiased results by avoiding conflict of interest and questions that insinuate the “correct” answer (check out [SurveyMonkey’s](#) post about [Survey Bank](#) for more info—and tips on how to make your own questions unbiased). Then, you can check your survey against other survey stats from the same industries in [SurveyMonkey’s](#) database, giving you a way to benchmark your answers and know what they really mean.

These and other professional tools—including scripting in surveys, tools to purchase survey responses, and more—help make [SurveyMonkey](#) a great option for business surveys. But it’s also a great survey tool to pick when you’re getting started, with its generous free plan that’s easy to grow with your survey needs.

**SurveyMonkey Pricing:** Free for unlimited surveys with up to 100

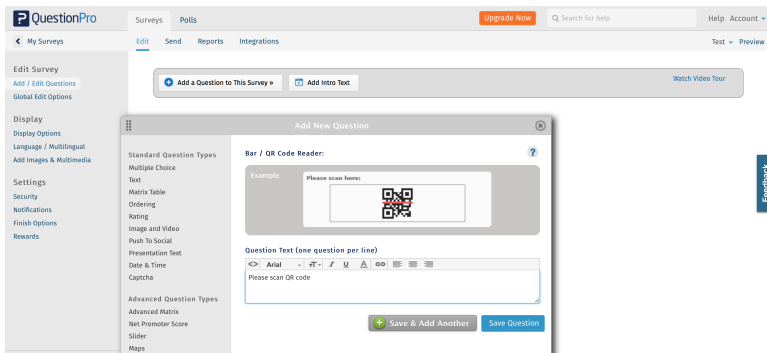
responses; from \$26/month [Select Plan](#) for up to 1,000 responses

*For a deeper look at SurveyMonkey's features and pricing, check out our [SurveyMonkey review](#).*

*See [SurveyMonkey integrations on Zapier](#)*

## QuestionPro

*for location based surveys*



Ever wanted to ask people what they thought about your business as they walk out the door, or survey people about their preferences as they're walking around your event table? [QuestionPro](#) makes that possible with its mobile apps and iBeacons support. With iBeacons placed throughout your location, and QuestionPro surveys embedded in your mobile app or the QuestionPro app installed, you can send push notifications and ask people to complete surveys based on where they are.

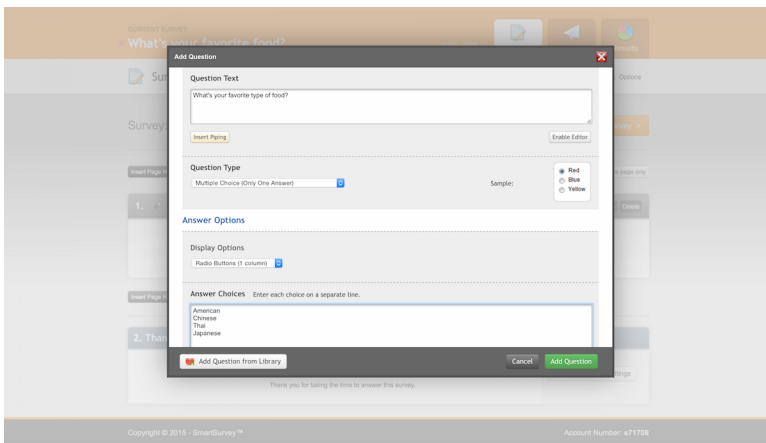
But if your business is online, QuestionPro works, too. Send out your survey on social networks, via email, or have it shown to customers as they're leaving your site. QuestionPro supports dozens of languages, so you can see what people are thinking no matter where they live. Making a survey won't even take that long, since

you can upload a Word document with questions and QuestionPro will turn it into a survey.

**QuestionPro Pricing:** Free for unlimited surveys and 100 responses; from \$12/month [Professional Plan](#) for unlimited responses

## SmartSurvey

*for collaborating on survey questions*



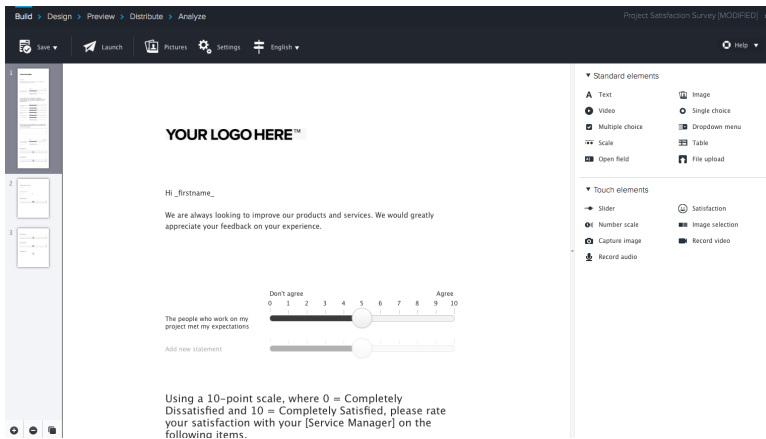
Collaborating on a Google Docs file is simple, and even works in real-time, but collaborating on building a survey is often far more difficult. You're almost better off working on a list of questions together, then having someone turn them into a survey. [SmartSurvey](#), though, gives you an easier option, with its shared library.

Everyone on your team can add questions and multimedia you want to include in a survey, and share it with each other. Then, when it's time to make the final survey, you can pull everything in together and make the final survey in minutes. Finally, you can share your results page with a download or with an online, password-protected dashboard, so everyone can get the feedback immediately.

**SmartSurvey Pricing:** Free for 15 questions per survey and 100 responses; \$40/month **Pro plan** for unlimited questions and 1,500 responses

## Surveypal

*for creating multi-page, multimedia surveys*



If you've ever used PowerPoint, InDesign, or any other app where you lay out elements on individual pages, then you'll feel right at home in [Surveypal](#). With a list of your pages on the left, your survey in the middle, and a palette of tools on the right, it looks much like any other creative tool.

Among those tools, you'll find the features you need to be creative with your survey, including options to let your contacts capture images, record audio and video, and upload files from your survey. You can upload photos of your own, store them in Surveypal, and reuse them later in your surveys—and you can add custom code to your survey to track analytics and more. You'll get the same great survey features, with an extra dose of creativity.

**Surveypal Pricing:** Free for unlimited surveys with up to 100



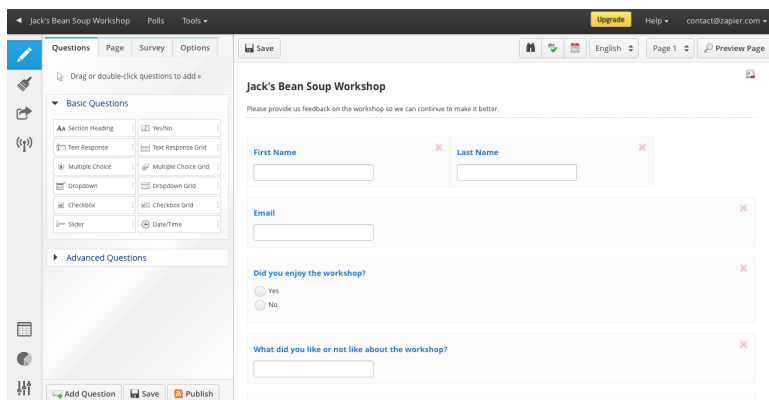
responses; from \$40/month [Premium plan](#) for 1,000 responses

*For a deeper look at SurveyPAL's features and pricing, check out our [SurveyPAL review](#).*

*See [SurveyPAL integrations on Zapier](#)*

## FluidSurveys

*for fast editing*

The screenshot shows the FluidSurveys editor interface. On the left is a sidebar with a 'Questions' tab and a list of question types: Section Heading, Yes/No, Text Response, Text Response Grid, Multiple Choice, Multiple Choice Grid, Dropdown, Dropdown Grid, Checkbox, Checkbox Grid, Slider, and Date/Time. The main area displays a survey form titled 'Jack's Bean Soup Workshop' with a feedback request. The form includes fields for 'First Name' and 'Last Name', an 'Email' field, and two questions: 'Did you enjoy the workshop?' with 'Yes' and 'No' radio buttons, and 'What did you like or not like about the workshop?' with a text input field. The top navigation bar includes 'Upgrade', 'Help', and 'contact@zapier.com'. The bottom of the editor has 'Add Question', 'Save', and 'Publish' buttons.

For a twist on the typical survey designer interface, [FluidSurveys](#) offers a modern, streamlined look with quick links to your survey's editor, design and results on the left side. You can be editing your survey and quickly jump to its results, then go back to tweaking in seconds. You'll get that same speed when filling out your surveys, with an interface that'll even let you fill out the survey offline and upload the results later.

And you won't have to design your surveys just for one audience, either. FluidSurveys includes support for 64 languages, along with bulk translation tools, so you can make a survey that's ready for much of the world. You can even take PayPal payments in a survey, making them a bit more like a standard form with questions. It's

a SurveyMonkey product, but it definitely has enough to make it worth considering on its own.

**FluidSurveys Pricing:** Free for unlimited surveys with up to 10 questions and 100 responses; from \$70/month [Select plan](#) for unlimited responses

*For a deeper look at FluidSurvey's features and pricing, check out our [FluidSurveys review](#).*

*See [FluidSurveys integrations](#) on Zapier*

## QuickTapSurvey

*for offline surveys*

QuickTapSurvey Matt

Dashboard Surveys Upgrade Help

Surveys > Edit Multi-Screen Survey > Add Question

### Add Question

Question Type: Multiple Choice - Single Answer

Question / Title: What's your favorite type of food?

Is Question Mandatory?

Add Question: To The Beginning

Possible Answers (one per line):  
American  
Chinese  
Thai  
Korean  
Mexican

Include "Other" with text input

Back Save Question Save & Add Next Question

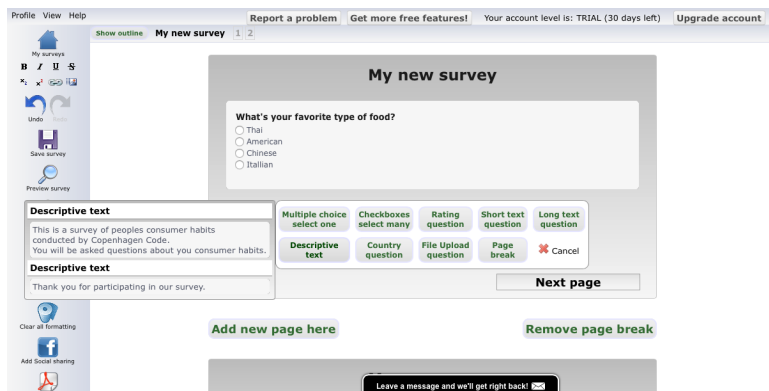
Online surveys are great—they let you get people's opinions, wherever they are, and whenever they're free to fill out your survey. But some surveys are best filled out offline—from door-to-door surveys where you may not have consistent internet coverage, to in-house QA assessments inside factories and other areas with limited connectivity—and [QuickTapSurvey](#) is a great option to build offline surveys that are perhaps even better than online ones.

You'll add your survey questions, typing multiple choice answers in a list instead of having to type each entry separately. There's even answer options that are designed specifically for mobile devices—you can grab locations, scan QR codes, capture images and more right from a survey. Then, you'll deploy your survey to iOS and Android devices, where they can be filled out offline and sync their data back when you're online again.

**QuickTapSurvey Pricing:** Free for 1 survey on 1 device with 50 entries; \$19/month [Basic plan](#) for 1 device with unlimited surveys and responses

## Obsurvey

*for simple surveys*



The screenshot displays the Obsurvey web interface for creating a survey. At the top, there are navigation links: Profile, View, Help, Report a problem, Get more free features!, Your account level is: TRIAL (30 days left), and Upgrade account. Below this is a 'Show outline' section with 'My new survey' selected. The main area shows a survey question: 'What's your favorite type of food?' with radio button options: Thai, American, Chinese, and Italian. Below the question is a toolbar with various question types: Multiple choice (select one, select many), Checkboxes, Rating question, Short text question, Long text question, Descriptive text, Country question, File Upload question, Page break, and Cancel. A 'Next page' button is also visible. At the bottom, there are 'Add new page here' and 'Remove page break' buttons, and a 'Leave a message and we'll get right back!' button.

If you want to throw together a few questions in a survey, [Obsurvey](#) may be one of the fastest options you have. Open the app, and you'll see the form editor with a selection of question types you can add to your survey. Select one, fill in its info, then click the *Add new question* link underneath and repeat, or add equally simple logic jumps with the *More options* button.

If you'd like to tweak your survey's design, there are a few basic

templates you can choose from, or you can design your own in CSS. Then, you can share your survey online, or export as a PDF and get answers offline—and then later type those offline entries into Obsurvey’s database to keep all of your survey responses together. It’s not the prettiest or most advanced survey tool, but it promises “surveys made simple” and lives up to that well.

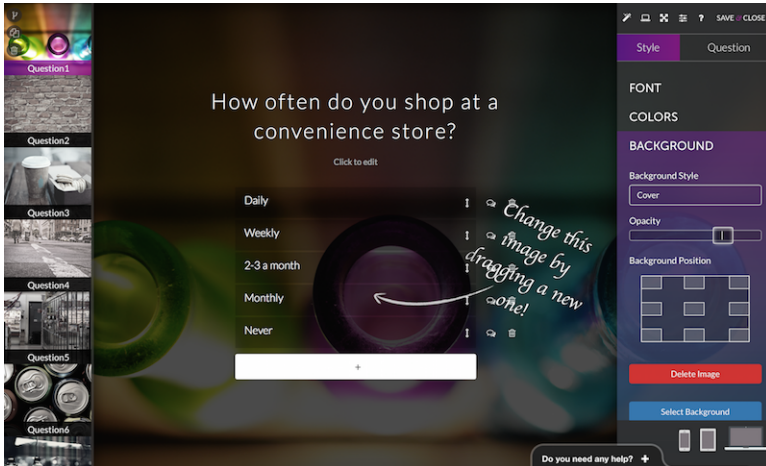
**Obsurvey Pricing:** \$12/month [Premium plan](#) for basic features and unlimited surveys

*For a deeper look at Obsurvey’s features and pricing, check out our [Obsurvey review](#).*

*See [Obsurvey integrations](#) on Zapier*

## Survmetrics

*for photo-powered surveys*



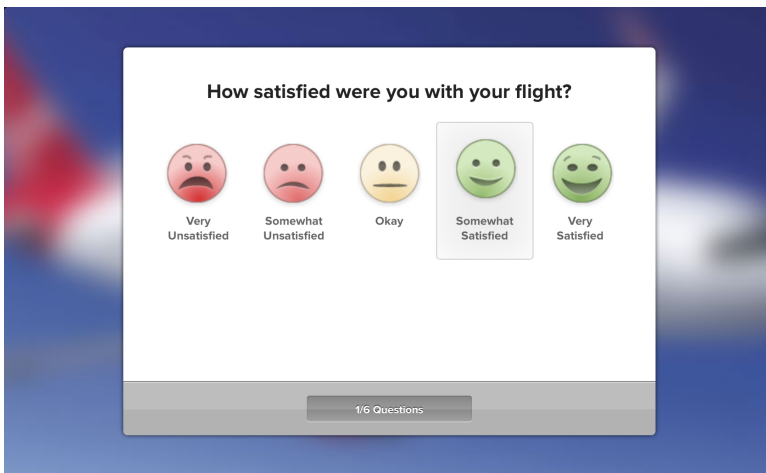
A plain background and a list of questions makes for a boring survey. Instead, what if your survey looked more like a presentation, with impactful graphics on every page? That’s what [Survmetrics](#) offers.

Create a new survey—or employ a pre-made template—and you’ll find a survey editor where each question is on its own page with a unique, full-width background image. Instead of having theme options for the entire survey, you can tweak the font, color, opacity and more for each question. And there’s still the survey tools you’d expect—tons of question types, branching and logic, and more—inside the fanciest surveys you’ll ever see.

**Survmetrics Pricing:** Free for up to 200 total responses; \$20/month [Starter plan](#) for 200 responses per month and full features

## PopSurvey

*for answering survey questions one at a time*



Polls and surveys are pretty similar—after all, a poll is just a simple survey with one question. That often makes poll apps far simpler to build and answer, since they’re focused on just one question. [PopSurvey](#) takes that same poll-style approach, and adds it to a normal survey that can have as many questions as you need—but your survey itself will look as simple as a poll, with only one

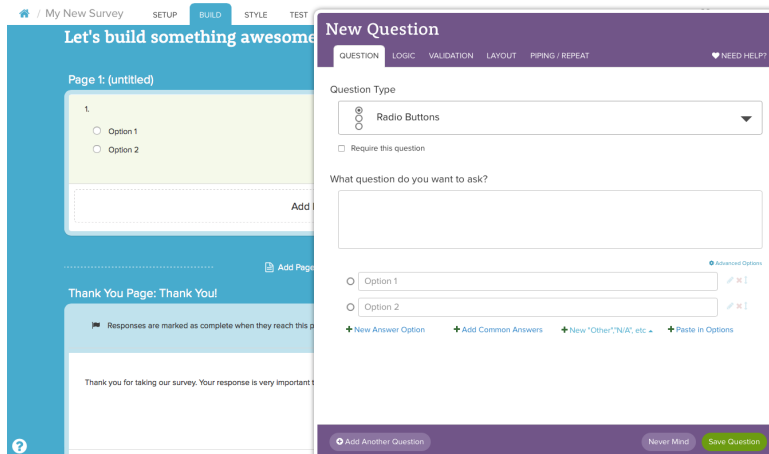
question shown at a time.

You can add full-featured survey questions, with everything from text answers to multiple choices with images and a matrix of answers. There are even rules to skip and branch your survey based on previous answers, and a dashboard to analyze your survey results that you can share with others. It'll even record answers as they're entered, so you'll get all of your results even if some are only partially completed.

**PopSurvey Pricing:** From \$24/month [Starter plan](#) for 3 surveys and 300 responses

## SurveyGizmo

*for testing your surveys*



Survey tools aren't usually fun to use, per se, and yet [SurveyGizmo](#) promises to be "survey software that will make you smile." You might find that its whimsical robot avatar or playful design make you smile, or you might smile over the form editor that's far simpler to use than most—one that helps you not have to think much

about the *type* of question you need to add. Its beautiful survey themes, with live previews in a demo browser and mobile device, might even make you smile.

But what makes me smile is SurveyGizmo's *Survey Diagnostics* tools, which uses data from other surveys in SurveyGizmo to estimate the accessibility of your survey, and how long it'll take people to complete. You can even get SurveyGizmo's team to test your survey for you, or invite others' feedback on your survey. That way, you'll get a polished survey others are sure to fill out. A survey that, perhaps, will even make them smile.

**SurveyGizmo Pricing:** \$25/month [Basic plan](#) for basic features and unlimited surveys

*For a deeper look at SurveyGizmo's features and pricing, check out our [SurveyGizmo review](#).*

*See [SurveyGizmo integrations](#) on Zapier*

## **LoopSurvey**

*for gathering survey responses on mobile devices*

The screenshot shows the LoopSurvey survey builder interface. At the top, there are navigation tabs: "Build questions", "Configure options", and "Preview survey". On the right, there are "Cancel" and "Save survey" buttons. Below the navigation is a text input field for "Enter survey title". The main area contains a table with two rows of questions:

Question Text	Type	Answer Options	Require
What's your favorite type of food?	Multiple Choice	<ul style="list-style-type: none"> <li>American</li> <li>Chinese</li> <li>Thai</li> <li>Italian</li> <li>Japanese</li> </ul> Add answer choice	<input type="checkbox"/>
On a scale of 1 to 10, how much do you like trying new food?	Numeric Scale	Scale 1-10 Min Label: Hate Max Label: Love	<input type="checkbox"/>

At the bottom left, there is a "+ Add question" button.

Some surveys aren't meant to be shared via email, or embedded in your blog. Instead, they're best to be filled out in person, perhaps at an event or conference booth, or by walking through a mall and talking to regular people, or by your employees as they come into work tomorrow. That's the type of survey in [LoopSurvey's](#) crosshairs.

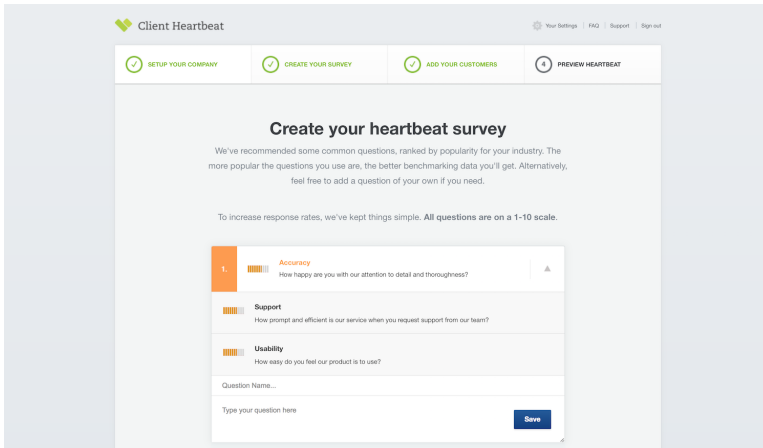
You build your surveys online, relying on a simple interface that lets you type in your question and then pick the answer type. After you deploy the survey to your team's mobile devices, it's displayed full-screen with beautiful background images and large touch-ready buttons. You can then collect responses directly on your iOS and Android devices, and have them show up automatically in LoopSurvey's web app back in the office.

**LoopSurvey Pricing:** \$25/month [Business account](#) per device

## Client Heartbeat

*for surveying your customers*





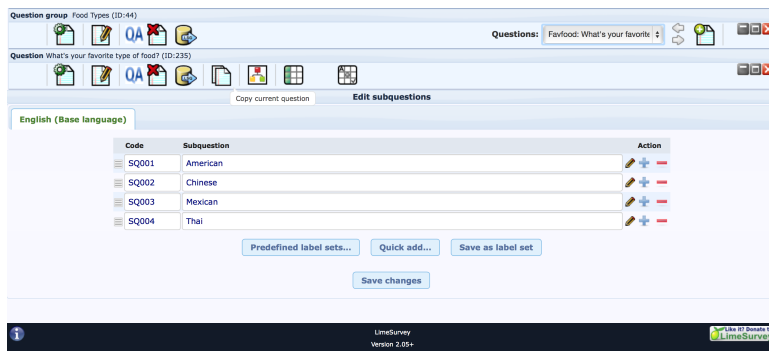
Wondering what your customers are thinking about your products and services? [Client Heartbeat](#) is a simple survey app that helps you take the “pulse” of your audience with surveys that’ll be automatically sent out every few months on a schedule you set.

Enter info about your company and industry, then Client Heartbeat will give you a pre-made survey with common questions to see what people think about your company—or, you can customize the questions as you’d like. Then, add your customers’ emails, and Client Heartbeat will send the survey automatically. You’ll then see which customers you’re at risk of losing, your biggest fans, and what you need to improve. It’s a quick way of getting actionable feedback in a survey.

**Client Heartbeat Pricing:** From \$39/month Basic plan for unlimited surveys, 1 user, and 50 contacts

## LimeSurvey

*for self-hosted surveys*



Looking for a survey tool you can run on your own server? [LimeSurvey](#) is the app for you. It's an open-source survey project that lets you build detailed surveys, host them on your own, or embed them in Drupal or WordPress sites. Surveys have just about any feature you could want, though you'll have to dig through menus to set them up, add question sections, and then tack on individual questions.

It's not going to win any fashion awards, and it'll take far longer to get started using than any other app in this roundup. But, if you want a survey builder that's 100% free and is deeply customizable, LimeSurvey's one of the better open-source projects to try. And, thanks to the open-source community, it also supports far more languages than you'll find in other survey tools.

**LimeSurvey Pricing:** Free open-source software to run on your own server

## Other Great Survey Tools

There are dozens of tools to build surveys, with many others that we didn't include in this roundup. If you're working in a large enterprise that has more advanced needs from your survey, you might find tools like [Qualtrics](#), [MaritzCX](#), or [Adobe Marketing Cloud](#) are better options.

Or, you might already have an app that includes a survey builder. Many [form builder apps](#) include survey templates, and all could be used to make a survey with a little extra work. [Marketing automation tools](#)—including email marketing apps like [Constant Contact](#) and [VerticalResponse](#)—also often include survey builders, so if you’re already using one of them for your marketing it might be best to use it for surveys, too.

Either way—whether you’ve picked one of the survey apps in this roundup or have rediscovered a survey tool built into an app you already rely on—what’s important is that you have a tool that makes it easy to build surveys.

## Put Your Survey to Work

Now that you’ve picked an app to build your survey, and have put together the questions you need answered, there’s one more thing you need: automation. Your new survey builder is likely great, with dashboards and notifications and reports and more. But chances are, you’ll want something more—better ways to analyze your data, follow up with people who filled out your survey, and automatically send your survey to your new customers.

Here are some great ways to automatically send out your survey, thank and follow up with respondents, analyze your data, and make your survey fit into your workflow. You may be able to do some of these things with your app itself. For everything else, use [Zapier](#), an automation tool that works with [hundreds of apps](#), including many of the survey tools in this roundup.

## Share Your Survey Automatically

If you’re wanting to survey your customers, you’ll need to do more than just share a link to your survey on social networks. You might

want to find out what each of your new customers think about your app, site, or store. For that, connect your e-commerce platform or payments app to your survey builder, and have it send a survey invite to each of your new customers.

### Zaps:

- [Send a Surveypal Survey to PayPal Customers](#)
- [Send WooCommerce customers a FluidSurveys survey invitation](#)
- [Send Shopify customers a SurveyMethods survey](#)

Marketer [Adrien O’leary](#) uses Zapier to share his FluidSurveys survey with every new contact he adds to his Knack database. Zapier copies the email of the contact, and sends it to FluidSurveys, which then sends the survey invite to the new contact automatically. “I also pass parameters in the survey URL so some elements of the survey (like name of a client’s business) can be customized,” says Adrien.

- **Zap:** [Send FluidSurveys Invites to new contacts in a Knack database](#)

If your survey app doesn’t include an integration to send survey invites automatically, you could copy the share link for your survey, and make an email Zap that’ll share your survey link to new contacts, customers, and more.

## Get Notified of Your Survey Responses

After working so hard to build your survey, it’ll feel great to see the responses come in. But there’s no need to wear out your refresh button to see if there are new results. Just connect your survey

builder to your team chat app, and everyone can be notified as soon as your survey is filled out.

#### Zaps:

- [Send new SurveyPal survey answers to Slack](#)
- [Send new SurveyPal survey answers to HipChat](#)

Or, if you'd rather get your survey responses via email, there's likely a setting for that in your survey builder dashboard. Those emails won't be very customizable, so instead, you can use Zapier to send you an email with just the survey info you'd like to see. You could get the full survey results each time, or just a quick message to let you know of a new submission.

That's why the [UP Global](#) team uses Zapier to send email notifications of their new SurveyGizmo survey responses, to help manage Startup Weekend and their interactions with their sponsor, Coca-Cola. "With 10,000 volunteers in more than 110 countries, coordinating volunteers and Coke representatives is no small feat," says Mitchell Cuevas, senior marketing director at UP Global. But it's easier with Zapier.

All they need is a Zap that watches for survey responses, then sends out email notifications to various team members based on where the response is from. "For example, if a volunteer selects Cambodia as his location, an email will be sent to the Coke representative in Cambodia containing all pertinent information and details drawn directly from the SurveyGizmo form," says Cuevas. Managing surveys in a large team can be simple with customized email notifications.

#### Zaps:

- [Send Gmail email notifications when SurveyGizmo survey is filled out](#)
- [Email new SurveyMonkey survey responses](#)
- [Email new SurveyPal survey answers through Gmail](#)

## Save Survey Responses

Don't start copying and pasting your survey result into your notes app or a spreadsheet—and don't wait until your survey is over to download all the results. Zapier can copy your new survey results automatically to your favorites spreadsheet app, word processor, notebook tool, or database.

The [Once a Month Meals](#) team uses Zapier's Google Sheets integration for just that. Whenever their SurveyMonkey applicant survey is filled out with, their Zap copies the survey data into different worksheets in the spreadsheet based on types of meals the applicant can cook. Their team can then find cooks for each type of menu just by opening the correct sheet.

That simple automation has helped their team work far more efficiently. "It saves us quite a bit of administration time as we don't have to export and sort each time we need to find a new person or look at the information provided," says Once a Month Meals founder Tricia Callahan.

- [Zap: Save new SurveyMonkey responses as Google Sheets rows](#)

No matter which apps your team uses to store your data and collaborate, you'll be able to work together on survey data far easily if it's in your favorite tools instead of hidden inside your survey builder. You can list entries in a spreadsheet, save them to your notebook, or even generate unique documents automatically based on each survey response.

**Zaps:**

- [Insert new Surveypal answers into new Google Spreadsheet rows](#)

- [Create Google Docs documents from SurveyMonkey survey entries](#)
- [Turn SurveyMonkey survey responses into Intellinote notes](#)

## **Add Survey Respondents to CRM**

Want an easy way to keep track of who's taken your survey? If you're sending your survey to your existing contacts, or the leads you've been working with in your CRM, then you'll want to note their survey responses right along with their other contact info. Just connect your survey builder to your CRM app—and make sure your survey asks for an email address—and each person's survey answers can show up on their profile in your CRM automatically.

**Zaps:**

- [Create/update Infusionsoft contacts from new Surveypal survey answers](#)
- [Update Hubspot CRM contacts from SurveyMonkey surveys](#)
- [Create new Salesforce leads from new Surveypal survey answers](#)

## **Stay in Touch with Survey Respondents**

It's not all about your own records. Your contacts and customers took the time to take your survey, so it'd be nice for you to take a minute and say thank you. But it doesn't even have to take a minute of your time. All you need to do is have Zapier automatically send an email to each person who fills out your survey. You could even include extra info about your company, or perhaps a special coupon code as an extra thanks.

**Zaps:**

- [Send Thank You Email for Completing SurveyMonkey Survey](#)
- [Send an email with Postmark whenever a Surveypal survey is filled out](#)

Or, if you want to make sure you keep a long-term connection, add your contacts to your email newsletter list. That way, they'll know as soon as you act on the feedback in the survey, and perhaps you can turn your survey focus group into your next customer base.

**Zaps:**

- [Add FluidSurvey Respondents to Constant Contact](#)
- [Add New SurveyMonkey Respondents to a MailChimp Email List](#)

## Integrate Any Survey Builder via Email

[Home](#) / [Mailboxes](#) / [Logout](#)

**Address**  
This must be a unique word or random combination of letters. Remember, you want this hard to guess!

@robot.zapier.com

**Template**  
Highlight the words you would like named and extracted and give it a name!

New survey response

Your survey "{{surveyname}}" was just completed.

Name: {{firstname}} {{lastname}}

Location: London

Favorite Food: Chicken

in 3 May 2015

or

Your friends at Surveys, Inc.

SurveyMonkey, Surveypal, and many other great survey apps are already integrated with Zapier, but if your favorite survey builder



doesn't work with Zapier yet, don't fret. If it supports webhooks or lets you subscribe to a feed of your results, you could use those to [add your survey app to Zapier](#) on your own.

Otherwise, almost every survey app will send you email notifications when your survey is filled out, and you can use those to integrate with other apps. Just use the free [Zapier Email Parser](#), or for more advanced features, try [Mailparser.io](#). Forward your emails to the Zapier Email Parser, or add your Zapier Email Parser address as your notifications email in your survey app. Then, teach the Zapier Email Parser which parts of the emails include important survey information.

Once that's done, you can connect your Parser account to any other app in Zapier. That way, you save your survey results, add your respondents to your CRM and email lists, and more automatically.










#### Zaps:

- [Get new Zapier Email Parser parsed emails in Slack](#)
- [Send Emails from the Email Parser to Campaign Monitor](#)
- [Copy emails from the Zapier Email Parser to your Knack database](#)
- [Create New Salesforce Contacts from Mailparser Processed Emails](#)

## Bonus: Download a Survey App Cheat Sheet

**\* Zapier's Survey App Cheat Sheet**

**The Best Survey Apps**

Name	Best for:	Free for:	Plans from:
 PollDaddy	unlimited poll and survey responses	Unlimited responses	\$29/mo.
 SurveyNuts	free surveys without an account	Unlimited responses	—
 SurveyPlanet	fast survey answers	Unlimited responses	\$20/mo.
 SurveyLegend	responsive surveys	3 surveys; unlimited responses	\$19/mo.
 SurveyMethods	event registration in surveys	500 responses	\$9/mo.
 Survs	quickly adding questions	200 responses	\$19/mo.
 FreeOnlineSurveys	quickly making a new survey	150 responses	\$19.99/mo.
 SurveyMonkey	getting unbiased responses	100 responses	\$26/mo.
 QuestionPro	location based surveys	100 responses	\$12/mo.
 SmartSurvey	collaborating on survey questions	100 responses	\$40/mo.

Want a simple way to keep track of the best survey apps? We've put together a PDF download with the most important info from this roundup, so you can easily compare the best survey apps, share them with your team, and decide on the perfect tool for your work. You'll find each of the apps listed, along with their best features and pricing—just as in the table above.

To download the cheat sheet, just head over to the Zapier landing page for [The Ultimate Guide to Forms and Surveys](#) and scroll down to the Download section. There, you can download the cheat sheet along with ePub and PDF copies of this entire eBook. Or, if you downloaded this book there already, you can find the cheat sheets in the *Cheat Sheet* folder.

Now that you've learned [the basics you need to build a survey](#) and have found a survey app to use, you're all ready to create an amazing survey and gather the data you've been needing. But what will you do with all that data? That's what Chapter 8 is for. It's an [in-depth guide to optimizing your survey](#) and turning your data

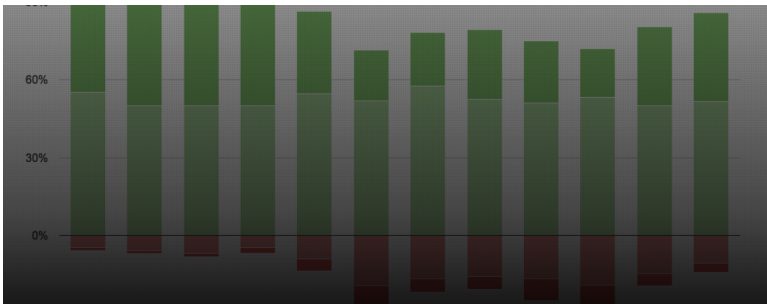
into meaningful graphs—complete with template spreadsheets to help you easily analyze your survey data.

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*Written by Zapier Marketer [Matthew Guay](#).*

*Image Credits: Clipboard photo by [Dave Crosby](#).*

# Chapter 8: How to Design and Analyze a Survey



Flawed data can guide even the greatest leaders to the wrong conclusions. When success hangs in the balance, you need to be *absolutely sure* that you're gathering the right data with the right methods. So we asked our data scientist, [Christopher Peters](#), to craft this guide about how to collect and analyze data. It's like a college-level course in survey design: you'll learn how to write questions, distribute them, and synthesize the responses.

Surveys can make a major impact on the direction of your company—especially if you get the results in front of decision-makers.

Whether that impact is positive or negative depends on the quality of your survey. Sound survey design and analysis can illuminate new opportunities; faulty design leaves your team swinging in the dark.

As Zapier's data scientist, I lead testing and analysis for everything related to our [app automation tool](#). I've used surveys to dissect how

many seconds each Zapier [Task](#) saves someone (it's close to 180 seconds), and why people upgrade to a [paid Zapier plan](#).

I've seen how data can be used as an instrument to help teams make smart choices. In this chapter, I'll teach you more than a dozen techniques that I use build an effective survey the first time.

## Before We Start

It's important to note that there's a great deal of controversy among social scientists about survey design, with conflicting suggestions about methods. Statistics like "margin of error" are still widely used, but they're rarely appropriate for online surveys—The Huffington Post's senior data scientist and senior polling editor, for example, [consider them an "ethical lapse"](#). Conventional wisdom about what matters is not always grounded in statistical science. To cope with this, this chapter sticks to simple tried-and-true methods. I hope you'll find them useful.

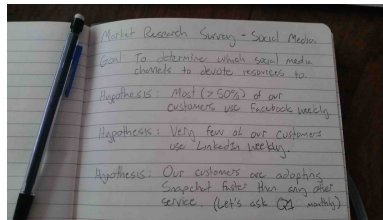
- 
1. How to Design a Survey
  2. The Best Survey Question and Answer Styles
  3. How to Phrase Survey Questions and Answers
  4. How to Select Survey Respondents
  5. How to Calculate the Number of Survey Respondents You Need
  6. How to Analyze Survey Results
  7. How to Interpret Survey Results
-

# 1. How to Design a Survey

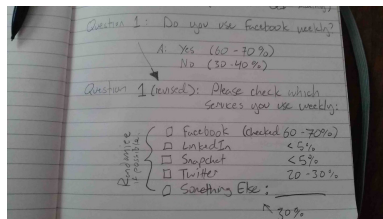
Before creating a survey, it's important to think about its purpose. Common purposes include:

- Compiling market research
- Soliciting feedback
- Monitoring performance

Write down specific knowledge you'd like to gain from your survey, along with a couple of simple questions you think might answer your hypotheses (including the set of possible answers).



Next to the answers, write down the percentage of responses you'd expect in each bucket—comparing the future results against these guesses will reveal where your intuition is strong and where blind-spots exist.



This pre-survey process will also help you synthesize the important aspects of the survey and guide your design process. Remember: As the scope of your survey widens, fewer people are likely to respond,

making it more difficult for stakeholders to act on results. Simplicity is probably the most important—and most under-appreciated—survey design feature.

## 2. The Best Survey Question and Answer Styles

The way you structure questions and answers will define the limits of analysis that are available to you when summarizing results. These limits can make or break your ability to gain insights about your key questions. So it's important to think about how you'll summarize the response to questions as you design them—not afterwards.

There are four main question and answer styles, and therefore four main response data types:

- Categorical - Unordered labels like colors or brand names; also known as “nominal”
- Ordinal - Likert scales like “strongly disagree to strongly agree” or “never to often”
- Interval - Ranges like “number of employee”
- Ratio - Numbers like inches of rain

Survey apps provide a wide range of data-collection tools, but every data type falls into at least one of these four buckets.

### Categorical Data

The categorial type of data uses specific names or labels as the possible set of answers. For example:

What do you like (most / least) about our product?

- Fast customer service
- Ease of use
- Quality
- Quantity

Categorical data is sometimes referred to as “nominal” data, and it’s a popular route for survey questions. Categorical data is the easiest type of data to analyze because you’re limited to calculating the share of responses in each category. Collect, count, divide and you’re done.

However, categorical data can’t answer “How much?” type questions, such as “How much do you value the speed of customer service?”

If you’re not sure which dimensions are important (e.g. customer service, ease of use, etc.), start with a categorical question—they’re more compact than the other question types, and can help your survey stay focused. Then, in a follow-up survey, you can ask “How much?” It’s better to send out a few rounds of improving surveys than a huge blast that misses the mark.

Sampling is your friend. Consider dividing your sample group so that you can send multiple successive surveys as you learn more about your respondents.

## Ordinal Data

Once you’ve identified categories of importance, asking ordinal style questions can help you assess that “How much?” type question. The ordinal response type presents answers that make sense as an order.

Never	Rarely	Sometimes	Often	Always
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Not important	Somewhat important	Neutral	Important	Very Important



If you're wondering, order can matter! Researchers at the University of Michigan's Institute for Social Research found that the order in which answers like these were read to respondents **determined how they answered**.

If it's possible, randomly flip the order of answers to ordinal questions for each participant. Be sure to keep the order consistent throughout the survey, though, or you might confuse respondents and collect data that doesn't represent their true feelings.

Alternatively, you could achieve the same effect by randomly splitting respondents into two groups and administering two surveys: one with the order of questions flowing from left-to-right, and the other from right-to-left.

## Interval Data

Data must meet two requirements to be called "interval": it needs to be ordered, and the distance between the values needs to be meaningful.

For example, a predetermined set of incomes like "\$20k, \$30k, \$40k" fits the interval data model. Another example might be: "1-50 employees, 51-100 employees, 100-150 employees."

Interval data is useful for collecting segmentation data (that is, it's useful for categorizing other questions). For example, you might want to ask a follow-up question about a respondent's plans to purchase a specific product—you could segment this question based on their response to a previous interval-style question.

If possible, it's best to use equally-sized intervals. This will allow for clarity in visualization when summarizing results, and also allow for the use of averages. If intervals aren't equal sizes, you should treat this data as categorical data.

## Ratio Data

Ratio data is said to be the richest form of survey data. It represents precise measurements. A key characteristic of ratio data is that it contains an amount that could be referred to as “none of some quantity”—where the value “0” or “none” is just as valid a response as “45” or “987,123” or any other number.

Here’s an example of ratio data: You might ask respondents about their income level with an input field that allows for numeric responses, like \$24,315, \$48,630 or even \$0.

The defining characteristic of ratio data is that it’s possible to represent the responses as fractions, like “ $\$24,315/\$48,630 = 1/2$ ”. This means that summary statistics like averages and variance are valid for ratio data—they wouldn’t be with data from the previously listed response types.

If you’d like to calculate averages and measures of variance like standard deviation, asking for a specific number as a response is the way to go.

## 2. How to Phrase Survey Questions and Answers

### Avoid leading questions

It’s easy to accidentally suggest a certain answer in your question—like a hidden psychological nudge that says “hey, pick that one!”

Imagine that you’re taking a poll on your local newspaper’s website. It asks “Would you support putting a waste management facility next to the town square if it was privately or publicly funded?”

- A. Privately funded
- B. Publicly funded

But what if you don't want to build a waste management facility next to the town square? The smell of garbage lofting through the air probably *won't* encourage people to visit your city. The survey only gives us two options, though: build it with private funding, or build it with public funding.

Without a “neither” option, you can't capture how every respondent truly feels. The question in the example assumes a piece of information that the respondent didn't agree on. The fancy word for that is “presupposition.”

It's perfectly fine to ask questions like “How useful do you consider Product XYZ?”, as long as the answer “Not at all” is included as an option. The key thing to avoid is “presuppositions.”

Presuppositions are an artifact of your own cultural sphere; you probably won't even recognize when you're including them in questions. The best way to avoid this is to send your survey to a few people in your target audience who you think would disagree with you on the topic. Soliciting feedback from a diverse audience can help you squash presuppositions and avoid creating a bias feedback-loop in your results.

## **Allow for Neutral or NA Responses**

It's hard to cover all of the possible ways a person might feel about a question. When you force a respondent to give an answer, it can pollute your data with non-responses masquerading as real answers. At first it may seem undesirable to let respondents off the hook, but doing so can improve the quality of your data.

## **Avoid Compound Questions**

If I asked:

On a scale of 1-100 rate the following statement(s): -  
Zapier and its blog posts help me do my job.

You would be forced to give a single answer reflecting feelings about both Zapier and its blog. This is sometimes called a “double-barrel question,” and it can cause respondents to choose the subject they feel most strongly about. These cases can lead you to falsely interpret the results. It may also be possible that respondents have opposing views about both subjects. In that case, you’re sure to collect misleading results.

Split the questions like these into multiple questions. Remember: Keep your questions as short and direct as possible.

## Use Simple Language

Cleverness, humor, and [business jargon](#) can confuse respondents, especially if it causes them to misinterpret the question you’re asking. Intentionally or not, we tend to write questions using ourselves and our cultural experiences as a reference, which can lead to poorly phrased copy that could confuse people. Using simple language can reduce the risk that the data you collect does not reflect the respondent’s meaning.

## Randomize Answers

Suppose you want to ask which of three products your users value the most (after making sure to include NA and “none”). It’s common for respondents to select the first answer simply because it’s the easiest and most available. Randomization for categorical-type answers can help you avoid this bias.

Beware, though: if your question asks for an ordered answer (e.g. from Strongly disagree to Strongly agree), you should keep the order of the answers consistent throughout the survey to avoid confusion.

## 4. How to Select Survey Respondents

Most surveys are sent to a small subset of a larger population. Using such samples to make general statements about the population is called inference. Descriptive statistics are statements about just the sample; inferential statistics are statements about a population using a sample.

It's worth noting that inferential statistics with surveys is difficult and commonly impossible, even for experts. Sometimes you just can't generalize the sample to the population in a reliable way—you're stuck making statements about people who actually filled out the survey.

Most of the time, you can chalk this up to sampling bias: when your sample is not reflective of the population that you're interested in. Avoiding sampling bias is particularly important if you intend to analyze the results by segment.

One of the most famous examples of this problem occurred in the U.S. presidential election of 1948.



Pollsters during this era used a technique called quota sampling. Interviewers were each assigned a certain number of people to survey. Republicans during that time tended to be easier to interview than Democrats, according to Arthur Aron, Elaine N. Aron, and Elliot J. Coups in *Statistics for the Behavioral and Social Sciences, a Brief Course*. This caused interviewers to survey a higher proportion of Republicans than existed in the overall voting population. The quota system was actually an attempt to avoid this problem, as [CBS News found](#), by creating representative cohorts of sex, age, and social status—but it missed that the segment (political party) itself was related to the survey mode.

The message is clear: Insofar as respondents don't match the population you wish to make a statement about, your survey statistics can be misleading. So what can you do?

If you send a survey by email, consider how respondents by email may differ from the population you wish to make a statement about.

Keep in mind that respondents to an emailed survey may not be representative of those who use your website. The opposite is true, too: if you place the survey on your website, the sample may not reflect those who interact with your organization through other methods.

To counteract that, try administering the same survey via each of the channels that your organization uses to interact with customers (email, website, phone, in-person, etc.).

If you can only use one mode, carefully consider if that mode is related to segments you'd like to analyze (e.g. are repeat customers more likely to respond?). The goal is to use a mode that will yield segment proportions that are representative of the whole population. This might mean you should distribute the survey through a variety of channels.

## 5. How to Calculate the Number of Survey Respondents You Need

The short answer is: as many as achieves a useful level of variability in responses. The right amount can be found by giving consecutive surveys and calculating the standard deviation of measures like ratio data.

If you're asking normal, ordinal, or interval-type questions, conduct a few baseline surveys and compare the results.

If the variability from survey-to-survey is low enough for the purpose of the survey, you've found the right number of people to sample. If your purpose requires less variability, increase your sample size relative to the population.

Another technique is to randomly break a sample group into a few equal-sized groups, administer the survey, analyze the results and then compare the results across the groups. The results will be statistically equivalent and the difference between the groups will be due to what statisticians call sampling error. If the differences are smaller than what you consider a difference important enough to act on, the group size is large enough for future surveys. However, if the differences between the groups are large in your view, increase your sample size—repeat these steps until the difference between the random groups is smaller than you'd consider important enough to act on.

Unless you're a surveying expert, deploying a voluntary survey in a way that delivers a valid measure of margin of error won't be possible—so the only way to get a feel for the number of people to survey is guess-and-check.

Need more precision? Increase your sample size.

## 6. How to Analyze Survey Results

It's easier than ever to [build an online survey](#) and send it out to customers, but analyzing the results is the tricky part.

As previously mentioned in the survey design section, there are four main ways to collect responses to each question and hence four main data types that you might confront when analyzing the results of a survey.

- Categorical data
- Ordinal data
- Interval data
- Ratio data

### Categorical Data

Calculate the total number of responses and then divide the number in each category by the total. These are called a relative frequency statistics. Many just call them percentages or shares, but the important aspect is that the sum should be 100%. For example:

**What do you like most about our product?**



Answer	Responses	Share
Fast customer service	30	$30 / 100 = 30\%$
Ease of use	40	$40 / 100 = 40\%$
Quality	16	$16 / 100 = 16\%$
Quantity	14	$14 / 100 = 14\%$
<b>Total</b>	<b>100</b>	<b>100%</b>

**(Relative) Frequency Table** Categorical data can be made more useful by grouping results by customer segment. For example, you might want to know if new customers answered differently than long-time customers. Other popular categories include:

- Product segments like “low-end”, “mid-level”, and “high-end”
- Geographical segments like ZIP codes, county, or country
- New customer versus established customers

The important thing is to carefully think about which categories are likely to be most meaningful to your organization. The worst thing you can do is blindly choose categories that aren’t meaningful to your business. Age groups and differentiation by sex are commonly seen market segmentations, but what will you actually do with that information?

After categorizing by groups, make a table or graph to report the data. For example, a contingency table (also called a cross-tabulation or crosstab)—which is a matrix of response counts or shares with one segment structured as rows and another as columns—can be very useful.

## Contingency Table

This table summarizes a fictitious set of 100 responses. First, I split the surveys into two groups that become the rows of the contingency table: those who were new customers, and those who were established customers. The groups are mutually exclusive (not overlapping) and exhaustive (sum to 100%).

Next, I count the number of responses by answer to the question: *What do you like most about our product?* Finally, I divide each count within each cell by the total number of responses to this question (including both groups).

(Total / share)	Fast Customer Response	Ease of Use	Quality	Quantity	Total
New customer	37% (28/75)	43% (32/75)	12% (9/75)	8% (6/75)	75% (75)
Est. customer	8% (2/25)	32% (8/25)	24% (6/25)	36% (9/25)	25% (25)
Total	30% (30)	40% (40)	16% (16)	14% (14)	100% (100)

Contingency tables show how responses differ by each category. What's interesting in this fictitious set of data is that new customers tend to like fast customer service the most, 4.6 times the rate that established customers do (37% / 8%). Also, established customers chose quality and quantity as most-liked characteristics 2- and 4.5-times more often than new customers chose those same characteristics, respectively.

## Ordinal Data

Ordinal-type questions are very popular, but many people make a critical mistake when it comes to analyzing the data they produce. The worst thing you can do is convert the responses to numbers and then calculate the average of those numbers. The reason is that an arithmetic mean (the most common type of average, and there are many) like  $(1 + 2 + 3 + 4 + 5) / 5 = 3$  implies that there is some measure of distance between values.

However, it doesn't make sense to say that feeling neutral is three times the feeling of strong disagreement, or that the feeling that something is important is twice the feeling that something is somewhat important. These are simple clues that converting ordinal labels to numbers can cause misleading results.

Instead, the best thing to do is to create a simple relative frequency table or contingency table like those shown above for categorical data.

How wrong can things really go? Well, consider a controversial question where most people are in either strong disagreement or strong agreement. In that case, an average would indicate that the data are centered in the neutral category. That's an extreme example, but the same thing can happen if the largest buckets are, say, "neutral" and "very important." Suppose responses were like:

**Don't do this:**

Not important (1)	Somewhat important (2)	Neutral (3)	Important (4)	Very Important (5)	Average
$1 \times 3 = 3$	$2 \times 60 = 120$	$3 \times 5 = 15$	$4 \times 2 = 8$	$5 \times 30 = 150$	2.96
3%	60%	5%	2%	30%	

The average of 2.96 would seem to imply that respondents felt neutral, when in reality a majority felt the subject was "somewhat important" (60%) and another large group (30%) felt the subject was "very important." In this context, even the label "neutral" feels out of place.

Instead, leave the data as a frequency table and allow the end-user to see the distribution of results directly. Avoid influencing stakeholders by showing the average. People love averages and tend to focus on them instead of the real story. Intentionally *avoid averages* and instead describe the data.

**Do this instead:**

Not important	Somewhat important	Neutral	Important	Very Important
3% (3)	60% (60)	5% (5)	2% (2)	30% (30)

Most respondents felt the subject was only somewhat important, but another large group felt the subject was very important. There are two main groups of customers here—we should try to figure out what those segments might be. This could let us focus resources on those who feel the subject is important and avoid wasting resources on those that feel the subject is only somewhat important.

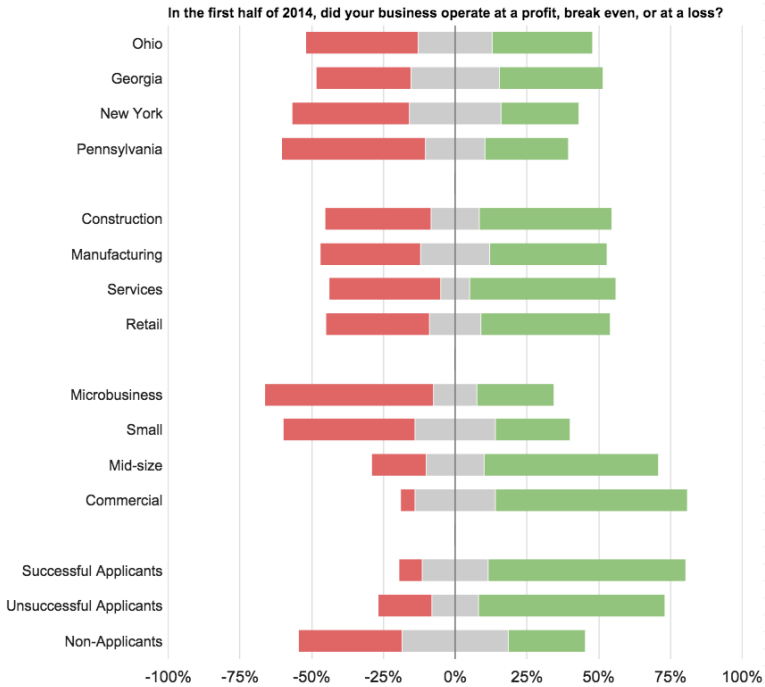
### How to Graph Ordinal Scale Data

Diverging bar charts are a great way to visualize ordinal data. The distinctive element is a common baseline that allows the eye to measure the length of each bar very quickly. These charts are great for comparisons across segments. Let's take a look at a public data set for an example graph.

Every year (since 2010) the Federal Reserve Bank of New York publishes a [survey of small businesses](#) (as defined by a business with less than 500 employees) covered by the Reserve Banks of Cleveland, Atlanta, New York and Philadelphia. The main purpose of this study is to determine which small businesses are applying for and receiving loans—that's the context being referred to when you see the term “(credit) applicants” in this data.

By graphing the data with a common baseline, comparisons of losses, breaking-even, and profit are made clear across category.

**In the first half of 2014, did your business operate at a profit, break even or at a loss?**



Retail businesses did poorly the first half of 2014. Successful applicants for credit were also much more likely to be profitable. Also, the larger the business the more likely it was profitable. This could be due to survivorship bias. That is, as insofar as a business is profitable does it become large. It could be that smaller businesses are more willing to operate at a loss. Or, it could be that larger U.S. businesses recovered faster from the financial crisis that began in late 2007.

If you find this graph style useful I've made [a template](#) that you can use. For more info on this graphical style, be sure to check out Naomi B. Robbins and Richard. M. Heiberger's article "[Plotting Likert and Other Rating Scales.](#)"

## Interval Data

A useful and safe way to summarize interval data is *as if* they are ordinal data.

Summarizing interval data with averages and standard deviations (see the “ratio data” section below for a guide) is possible, but only if the distance between intervals is even. For example, questions like “on a scale of 1-10” with answers of 1, 2, ..., 9, 10, are generally considered even intervals. However, there is some controversy to this.

People tend to avoid extremes, so it might not be accurate to say that the interval of 5-6 is 11 times an answer of 0-1. Think of measures of pain, for example: is the distance from 5-6 the same as 0-1 or 9-10? I bet not.

My suggestion is to treat interval data *as ordinal data* if the intervals are even, otherwise treat it as nominal data and use a contingency table for summary.

Below is an example of the way that uneven interval data can misrepresent data. This example comes directly from someone I consider a great visualizer of information: Stephen Few. I highly recommend Stephen’s [site on visualization](#), especially with his article about [selecting the right graph for your data](#).



You can also [use a free template](#) for Google Sheets.

## Ratio Data

There's one big advantage to using ratio data: it's rich enough to support averages. As before, for our purposes here, when I say "average" I'm specifically referring to the popular arithmetic mean, for example  $(1 + 2) / 2 = 1.5$ .

It's perfectly valid to take a set of ratio data and calculate the arithmetic mean like  $(\$38,500 + \$65,214) / 2 = \$51,857$ .

Averages give you, the surveyor, a measure of where the data centered. They are also useful to measure the spread of responses, especially using the **standard deviation** statistic. Intuitively, it can be thought of as the average distance from the center of the data. Calculating the standard deviation requires a two step process.

1. Calculate the variance statistic
2. Take the square root of the variance statistic

The variance statistic is defined as:  $SUM( [each\ value - mean]^2 ) / N - 1$

For example:

Response (N = 3)	Sessions Attended	Avg. Sessions	Deviation	Sq. Deviation
1	2	5	-3	9
2	6	5	1	1
3	7	5	2	4
Sum				14
N - 1				2
Variance				7
Std. Dev.				2.64

For this survey data, we would report, "the average number of sessions attended was 5 +/- 2.64 sessions." Ratio data is special

because it allows for measures of centrality (average) and dispersion (standard deviation) unlike nominal, ordinal, and non-equal interval data.

## 7. How to Interpret Survey Results

### Focus on the High-Points

Visualizing data is one of the most important activities I carry out at Zapier. It's a passion of mine because graphs can elicit a wide variety of emotional responses. People have very different reactions to data based on how it's graphed, so it's important to be thoughtful when creating visualizations.

Knowing the challenges with measurement, I guide my coworkers at Zapier to focus on trends and avoid reading too much into small differences in data. It's easy to lose the big picture when looking at statistics and graphs, so it's important to remember that some error exists with any method.

Don't miss the forest through the trees; when interpreting results, start with the largest differences first, not the most unusual. If you notice an unusual result, be skeptical and see if the result can be replicated in another survey.

### Collect a Few Baseline Surveys Before Making a Large Change.

If it's practical, try repeating and summarizing surveys a few times before making a large product or business change. Get a feel for what's normal and how much responses vary from survey from survey. It's possible to fall into a trap of chasing noise (sampling error) and effects that are not repeatable. Replication (repeated surveys) is the best way to learn what represents signal and what represents statistical noise.



When repeating the same survey, you might find that responses vary wildly for the same question even though no great change was made (see the section titled “How many people should I survey?”). In this case, you’ll learn that the question is not a reliable metric for defining success. Or, you might be lucky and find that responses are generally similar before making a large change.

Once you make the change, you’ll have a better idea of whether changes in response to the survey question are due to the decision you made or not. The point is to learn a bit about how users respond to the survey before using it to make a large decision.

## **Respect Your Surveys Limits of Precision**

It’s crucial to understand the limits of precision for each dataset you work with. Since most surveys represent only a small fraction of the group of interest, there exists error when making inference on a population. If the survey were actually sent to several groups at the same time, the resulting relative frequencies (percentages) would likely vary by more than 1%. That means showing numbers like 25.67% would communicate a false degree of precision.

When reporting your survey results, round to numbers like 25% to avoid communicating a false degree of precision. How much should you round? That depends on your survey’s sampling variability (see the section titled “How many people should I survey?”).

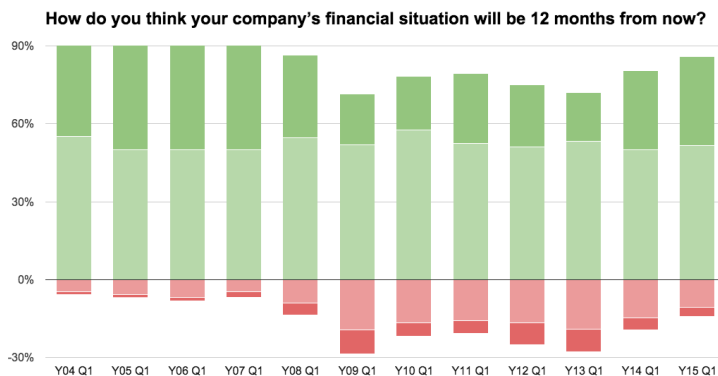
## **Table or Graph?**

Tables are most useful when you’re looking at precise numbers, or when there are few comparisons. Large tables make it hard to reason about the distribution of outcomes, and in these cases visualizations are preferable.

I’ll use an interesting survey of small businesses as an example. The survey is carried out by Gallup, Inc. for Wells Fargo bank, and they

present a raw table for you to use on the [Wells Fargo site](#).

In this case, the individual numbers are the important part. The table is useful, but it's very difficult to digest. Below is a visual representation of the table titled "Financial Situation 12 Months From Now":



Copyright © 2015 Gallup, Inc. All rights reserved. This graph is an interpretation of data compiled by Gallup, Inc. However, Gallup, Inc. had no part in the creation of this graphic interpretation.

The visualization (called a diverging bar chart) makes it clear that small businesses turned very pessimistic about their financial situations beginning in the first quarter of 2009. It's also clear that optimism hasn't yet returned to the levels seen when the survey data begins in 2004.

## Conclusion

Surveys and polls are a very effective tool for gathering feedback from customers and reducing the uncertainty around important de-

cisions. By writing down the purpose of your survey and hypotheses up front, you'll be able to learn where your intuition is strong and find organizational blind spots.

Surveying is hard and biases can enter through poor survey delivery and poor question design. It's important to think about which data type will be most useful to answer the questions at hand. Focused surveys are the most likely to yield actionable results.

Rather than sending out one massive survey, iterate on a set of survey instruments sampling a bit of the population as you go. The process is as much about finding the right questions as it is about finding their respective answers.

Once you feel confident with your design, send out one large final survey. Keep in mind that the best designed survey in the world is useless if its results are not communicated effectively to stakeholders. Don't abuse categorical or ordinal data by taking averages, summarize by relative frequencies. Don't bombard readers with huge tables that are impossible to digest—take a bit of time and create a diverging bar chart. If you use interval data, keep in mind its utility for segmentation and don't fool readers by visualizing uneven intervals.

Finally, surveys are no place to get fancy. Keep it simple and you'll find that no matter the results you'll learn something of use!

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You've made it. You've learned about [the difference between forms, surveys, and polls](#), have found the [best form apps and survey builders](#), learned how to [integrate forms into your work](#), and now have the tools you need to analyze your data. But there's something more. Sometimes, you need a bit more power than just a standard survey for form builder gives you. Perhaps you want an easier way to analyze your data directly from a database, or want to build your

forms into an in-house tool that works together with the rest of your data.

For that and more, there are database-powered app builders. In Chapter 9, for some bonus apps to help you do even more with forms and surveys, you'll find a roundup of the [best apps to build your own in-house tools](#) without much more work than most form builder apps require.

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*Written by Zapier Data Scientist [Christopher Peters](#).*

*Image Credits: Election photo courtesy [Library of Congress](#).*

# Chapter 9: Building an App the Simple Way: 6 Database-Powered App Builders



Whether you need to manage customer data, organize inventory information, or keep track of your business contacts, there's likely *an app for that*. Or 30. The only problem is, no app is a perfect match to the way you work.

In your business, you have specific customer characteristics to track, unique inventory to categorize, or new types of contacts to file away. So with custom needs piling up—and software options whittling down—you come to a conclusion: it's time to build your own web app. But the thought of that—the billable hours or staff time—make your cringe.

Fortunately for you, there's another option you may not know about: building your own internal tool with a database builder.

From tools like Microsoft Access to more modern apps like Zoho Creator, there are database builders that make it simple to build

any type of app you need. The only requirements are that your data can be entered with a form, stored in a database, and displayed in common rows, tables, or charts. If you're able to manage that, you'll get an app with *just* the features you need, and it won't even be that difficult to make it or break your budget.

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## Learn About Database Builders

- Why Build Your Own Tools?
- The Database Builder Solution
- An Intro to Databases and Common Terms

## Build Your Own Internal Tool

1. Lay the Foundation
2. Pick a Database Builder
3. Put Your New Internal Tool to Work

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## The Need for Custom Internal Tools

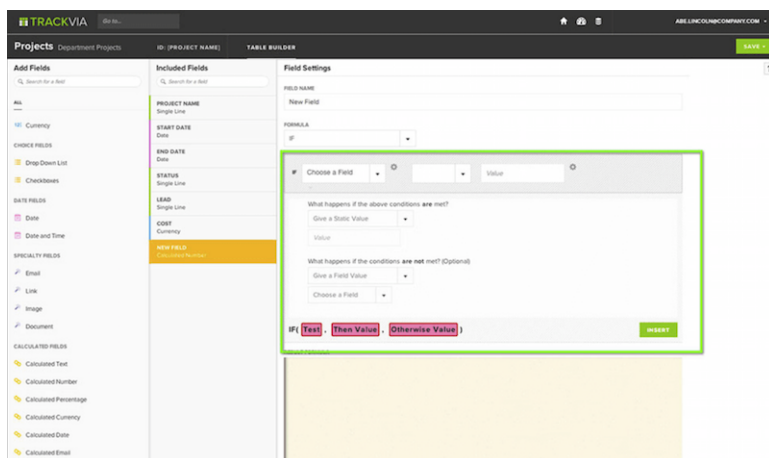
“Although I have never written a line of code in my life I was able, with the video tutorials, to build a decent database and interfaces.” Matthew Whittall, Knack user

Have you ever needed a particular tool for your work, but even after trying dozens of apps couldn't find anything that fit your needs

precisely? That was exactly the dilemma the [inVigor Law Group](#) had in finding a tool to track their work for billing and more.

“We’d tried a number of different solutions and they were all clunky and not customizable,” says inVigor Law Group founding partner Kyle Hulten. Even the industry-leading time-tracking app for lawyers, [Clio](#), didn’t fit their needs.

“Clio just wasn’t customizable enough,” said inVigor Law Group founding partner Kyle Hulten. “We have a largely transactional practice (meaning we do more contracts than litigation) and Clio and most legal productivity software is built for litigation. We’d tried a number of different solutions and they were all clunky and not customizable.”

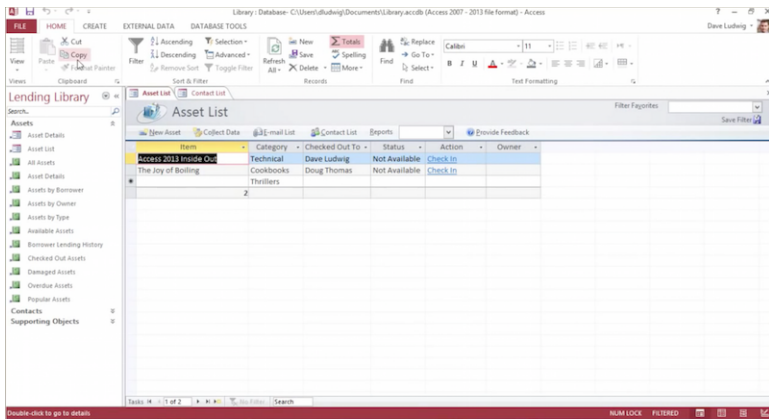


### Using TrackVia to build a customized tool

TrackVia, a database builder that makes it easy to create your own internal tools, saved the day. The inVigor team used TrackVia’s tools to build forms they’d need to collect data, charts and tables that’d display their data, and used Zapier—and app integration tool—to connect to their other software. And before long, they had their own database-powered internal tool that did everything they needed.

Coding your own custom software is difficult, time consuming, and expensive—it’s far more trouble than most teams can justify. But with a database builder like TrackVia, Knack, or even Microsoft Access, you can make something that works like that app you’ve always wanted for your business without touching a line of code.

## The Database Builder Solution



Microsoft Access has long been the first choice for companies who want to build their own internal app

Start listing the apps you currently use or need for your business—the tools that track your customers, inventory, and finances—and you’ll quickly realize that most of them, at their core, are built to store data. Each one has an interface that makes it easy to add, view, and manage that data, but they’re all built on a database that keeps things organized.

That’s the basic framework for most apps: a main interface that you interact with, and the hidden code where your app data is stored. Your CRM, inventory manager, and even social network apps are all—on a basic level—a database with a pretty face.



If you ever tried to make your own app on a PC in the '90s or early 2000s—or if you worked at a small store that had their own custom in-house programs—there's a good chance you used Microsoft Access. That's the database program that was bundled with professional versions of Microsoft's then-ubiquitous Office suite, and it promised the ease of Excel with the power of a database-builder. (Let's not dwell on whether or not Access lived up to that promise).

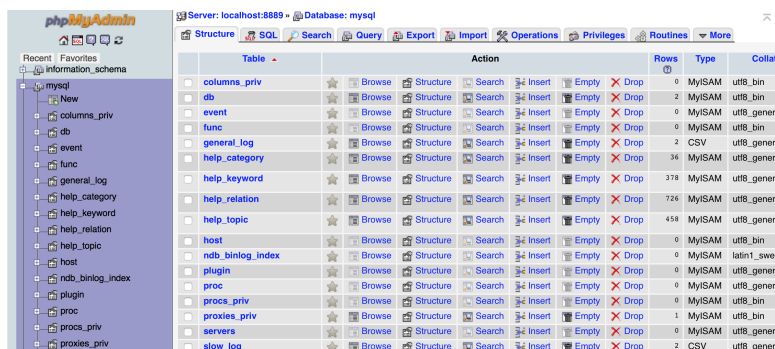
Today—through newer versions of Access and other online database builders like Knack and Zoho Creator—it's even simpler to make your own software tools.

## What is a Database?

When I imagine a database, I picture a giant, searchable server farm that stores billions of data points—the kind of thing that the cast of *CSI* would tap to cross-check a fingerprint fragment against thousands of criminal profiles. Like most Hollywood depictions, that's a little overblown, but it's not totally off base.

A **database** (“DB” for short) is a structured collection of data. The key word there is “structured”: searching an unstructured database would be like trying to thread a needle in a dark cave with oven mitts on.

In most database systems, each piece of data—everything you save into the database—is related to other pieces of data. A contact, for instance, may be related to all other contacts from the same company, or all others that live in the same state, or all others that have shown interest in the same product you sell. And a good database will make it easy to surface those related pieces of data.



The Admin screen for a MySQL database

Of course, databases aren't the only way to store your data. For things like personal finances or a list of contacts, a spreadsheet should do the trick. Even a plain text or Word document could work (if you enjoy tormenting yourself).

So why use a database? Because you need to do more with your data than just see it in a list.

In a spreadsheet, you could sort your addresses by state, or your contacts by company—or perhaps you could use your app's *search* tool to dig a bit deeper. In a database, though, you'll be able to make queries that show those specific, related pieces of data. And, unlike the data that compiles inside your form app, you'll be able to update the data that's been entered over time, and reuse existing data in new forms.

It's that ability to update data that led the [Lotus Gardens](#) team to use [TrackVia](#), a simple online database tool, after having trouble manually updating spreadsheet info with new data from [Wufoo](#) form submissions. "We were finding the information increasingly tedious and complicated to manage details such as personal info, membership discount, housing, meals, our shuttle service, etc." says Lotus Gardens' Linda Fisher.

Switching to TrackVia and using its integration with Zapier—an app [connecting TrackVia to hundreds of complementary apps](#)—to keep things up-to-date simplified their work immensely. “The relief was amazing—seeing things move from Wufoo to Trackvia in real time!” Fisher says.

Before you dive into making your own internal tools with a database builder, though, here’s a quick primer on the terms you’ll need to know as we dissect the available options for simple online databases.

## Common Database Terms

- **Database:** A file that contains your entered data in a structured, organized format that enables easy access to data.
- **Database Builder:** An app that makes it easy to create a database, along with the forms and tables needed to add and view data in the database
- **Table:** A set of related data inside a database, similar to a sheet in a spreadsheet.
- **Field:** A set of data inside a database table that describes one aspect of the data entry, similar to columns in a spreadsheet where each data item is a row in the spreadsheet.
- **Record:** One data item, which is stored in a database table and is made of of entries in any number of fields.
- **Query:** A search or filter that displays a set of your data records.
- **DBMS:** An acronym for *Database Management System*, or in other words an app that manages a database.
- **SQL:** A popular programming language to manage data in a database, used in MySQL, Microsoft SQL Server, and more.

There are other database terms, including those for their related apps and tools, but these are the ones you need to know to use the

following database builders in this chapter, and then some. If you *really* want to learn more about databases, the [Wikipedia article on databases](#) is a good place to start.

For now, let's look at how you can build a simple database-powered internal tool.

## 1. Lay the Foundation



Sketches of Zapier's review pages, made during our design process

You likely already have some idea of what you want your own internal tool to include—the things your team will need to track, the reports in which you'll need to find those things again easily, and more. You've likely used or seen apps *similar* to what you want, and have a list in the back of your head of aspects that you'd like to be different, just like the inVigor Law Group did.

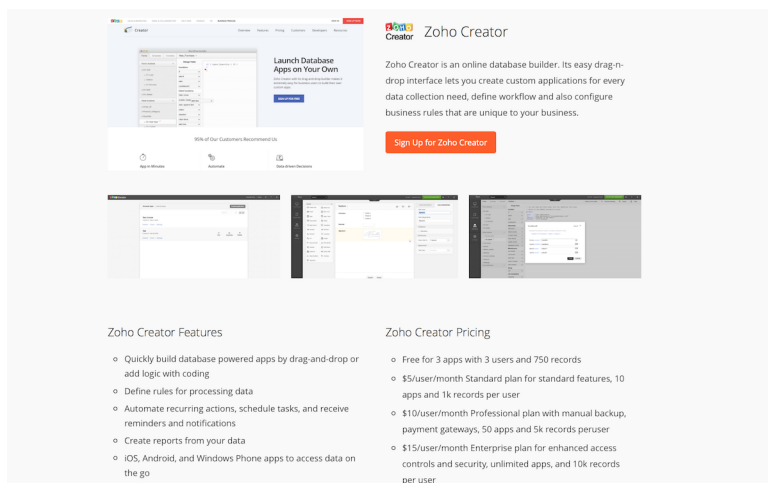
Before you dive into one of the app builders below, however, you should stop and list your team's requirements from the internal tool you need. Start asking broad questions. What data do you need to collect? How do the piece of data relate to each other—do you need to sort products by category or contacts by company or industry,

for instance? If so, those will make up the “tables” and “fields” in your database, and you’ll need form fields to make it easy to add each of them.

Then ask the team: What do you want to do with the data? List each answer and keep that document handy as you’ll want to check over it when evaluating the database builders below. These answers will become the “views” and “pages” in your internal tool.

Once you’ve planned what you’ll need from your tool, you’ll be ready to actually start building it while you’re trying out apps below.

## 2. Pick a Database Builder



The screenshot displays the Zoho Creator website. At the top, there's a navigation bar with the Zoho logo and 'Zoho Creator' text. Below the navigation, a main section features a large screenshot of the Zoho Creator interface with the text 'Launch Database Apps on Your Own' and a 'Sign Up for Zoho Creator' button. To the right, a descriptive paragraph states: 'Zoho Creator is an online database builder. Its easy drag-n-drop interface lets you create custom applications for every data collection need, define workflow and also configure business rules that are unique to your business.' Below this, three smaller screenshots show different views of the application builder. At the bottom, there are two columns of text: 'Zoho Creator Features' and 'Zoho Creator Pricing'.

**Zoho Creator Features**

- Quickly build database powered apps by drag-and-drop or add logic with coding
- Define rules for processing data
- Automate recurring actions, schedule tasks, and receive reminders and notifications
- Create reports from your data
- iOS, Android, and Windows Phone apps to access data on the go









**Zoho Creator Pricing**

- Free for 3 apps with 3 users and 750 records
- \$5/user/month Standard plan for standard features, 10 apps and 1k records per user
- \$10/user/month Professional plan with manual backup, payment gateways, 50 apps and 5k records per user
- \$15/user/month Enterprise plan for enhanced access controls and security, unlimited apps, and 10k records per user

Now that you’re ready to build your own database-powered tool, here are the best database builders we’ve found for the job. Each one makes it easy to make forms, collect data, and sort through that data. Plus, they each have their own features to make them unique.

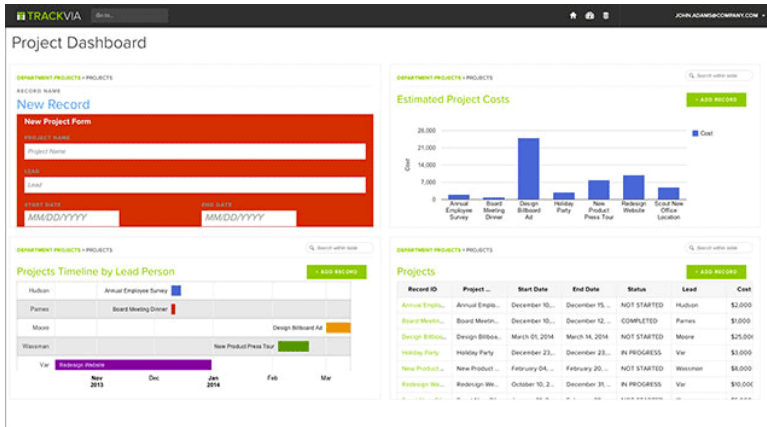
Each database builder’s name and screenshot is linked to a full

review of the app, so be sure to click through to the review to learn more about the details that might sway you towards one app or another. You'll also find extra screenshots, features, companion apps, and detailed pricing info in each review.

App	Great for:	Price
 TrackVia	building quick, graphical apps	From \$199/month
 Knack	simple database building	From \$39/month
 Podio	building an ecosystem of apps	Free for 5 users
 Zoho Creator	building advanced apps with scripting	Free for 3 basic apps
 QuickBase	team collaboration in custom tools	From \$15/user/mo.
 Form Apps	doing more with simple forms you already use	From free
 WordPress	self-hosted internal tools	Free, plus form plugin & hosting costs
 Microsoft Access	Sharepoint and Office integration	From \$12.50/month

## TrackVia

*for building quick, graphical apps*



If your business has already been collecting data for some time, you've likely been using spreadsheets as a manual database. There's no need to reproduce your work, though, since TrackVia can turn that spreadsheet into a database-powered app for you. Just upload your spreadsheet, and it'll turn sheets into tables and columns into elements, and import the data automatically.

Better yet, get started quickly by using one of TrackVia's pre-made apps. You can import inventory tracking, project management, CRM, and other app templates, and customize them as you want. And if you want to make your app a bit smarter, you can add formulas and logic flows from simple drop-down menus that let you code without typing in any text.

Then, when you're working on the go, TrackVia has you covered, as well. Most web apps will work OK from your smartphone and better on your tablet, but they're not ideal and you'll often find yourself constantly zooming and trying to tap the right button. That won't be a worry with TrackVia, since it includes iOS and Android apps that let you add data, view and sort through it, and more all from your phone. It won't be exactly like your full-featured internal tool, but you'll get most of the features from wherever you are.

- **Price:** \$199/month for up to 10 apps, 10 users, and 250k

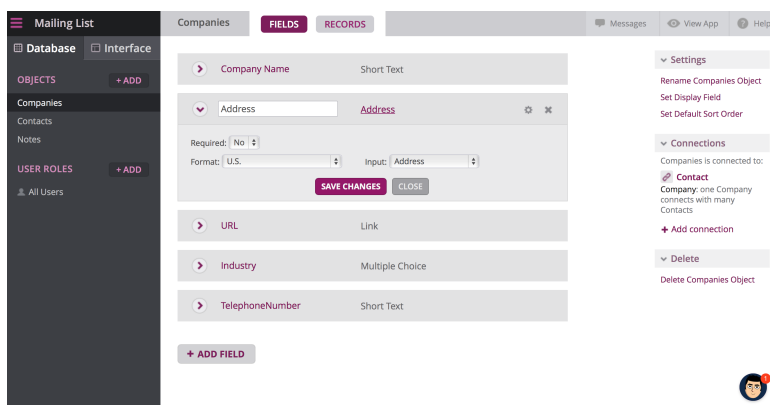
records

- **Skill Level:** Beginner—very easy to use, with templates and spreadsheet imports

For a deeper look at features and pricing, see our [TrackVia review](#).

## Knack

for simple database building



**Knack** is another simple take on a database builder, one that's focused a bit more on your database itself. When you first open Knack, you'll be asked to add the database objects (or tables) where you'll store the data, and the fields that each table needs along with the type of data the field is for. That'll help you make sure you are collecting all the data you want and storing it in an orderly manner.

Then, Knack does the rest of the work for you. Click the form button to add a form, for instance, and Knack will ask you to select a database object and then will automatically create a form that includes all of the fields you already added. It'll do the same with views, giving you simple ways to sort through and visualize your data based on the work you already put into your database.



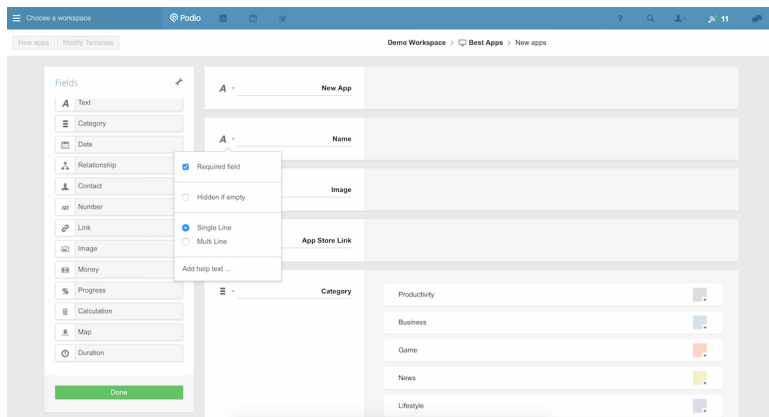
If you want to add more features to your internal tool, Knack includes *Workflows* that'll automatically run whenever data is added. You can use them to sort data, verify it, send notifications about new entries, and more. Then, if you're using your app to collect data for your website, you can embed your Knack views into your site to share your work with the world.

- **Price:** \$39/month Starter plan for 3 apps and up to 20k records
- **Skill Level:** Beginner—quite easy to use, though you will need to think more about your database

*For a deeper look at features and pricing, see our [Knack review](#).*

## Podio

*for building an ecosystem of apps*



Want a way to keep all of your team's work together, and also make your own apps? [Podio](#) might be the best option for you. It's a business social network, with a live activity stream of what everyone's working on, individual and team chat, and workspaces

to keep everything organized. And, it also includes hundreds of pre-made apps to manage everything—project, accounting, marketing, news, files, and so much more—along with a simple app builder to make anything you want.

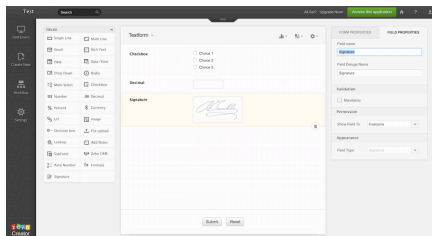
You can install a tool from the [Podio App Market](#) and tweak it for your needs, or make your own internal tool by dragging in simple form fields. Then, your team can add data from the form, organize it in tables, boards, lists and more, have data automatically added to apps via RSS, email, [Podio Extensions](#) or from other apps via Zapier. It's incredibly simple to start using, and will make nice looking simple internal tools—though perhaps without as advanced of features as you could script together with more database-centric tools.

- **Price:** Free for up to 5 users; from \$9/user/month Basic plan with most features
- **Skill Level:** Beginner—simple to use, but needs to be used with other Podio apps to get most benefit

*For a deeper look at features and pricing, see our [Podio review](#).*

## Zoho Creator

*for building advanced apps with scripting*



You're reading through this list of database builders so you can build your own tools without coding—but [Zoho Creator](#) might convince

you that a *little* coding isn't so bad. It's a form-and-database-focused app builder just like the others, but it also includes simple workflows that'll help beginners write code.

Start off by adding form elements to your Zoho Creator app, and it'll make the appropriate database tables from those fields. Then, you can add custom actions to each field to verify data, show or hide fields based on what's entered, and display data from your database. Each of these actions can be hand-coded, or you can click buttons to add the code directly and then tweak it yourself. Then, when you're done with your database, you can code your own pages to display the data in the same way.

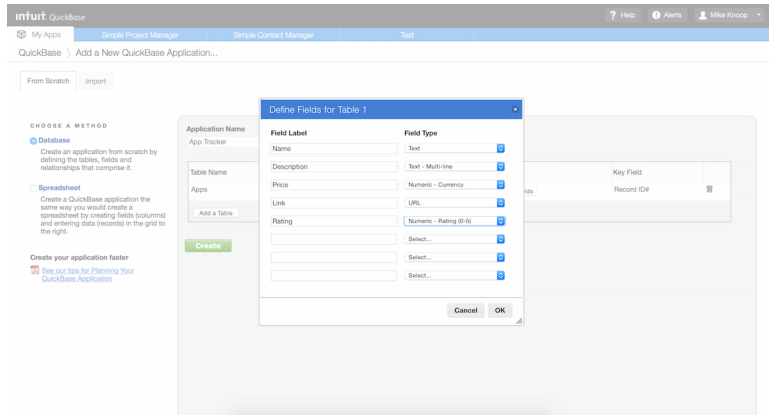
Zoho Creator can still be a simple app for building internal tools—you *could* just make forms and use its pre-made views to quickly put together your own tool—but it can also let you make much more advanced tools if you want to dig a little deeper.

- **Price:** Free for 3 apps and 750 records; from \$5/user/month beyond that
- **Skill Level:** Intermediate—easy to get started using, but scripting will take more effort

*For a deeper look at features and pricing, see our [Zoho Creator review](#).*

## QuickBase

*for building advanced apps with scripting*



From the same team as QuickBooks, Intuit's [QuickBase](#) is another great way to build internal tools, either with a template from the [QuickBase Exchange](#), a spreadsheet your team's already been using, or by hand-designing your database. You'll define every database field, then QuickBase will automatically make forms for adding new entries, and you can use QuickBase's quickly customizable dashboards and reports to analyze your data.

Then, if you're working in a team, QuickBase's best feature is its detailed permissions and workflows. You can set exactly what everyone on your team is allowed to see, add, and change, and then get QuickBase to do the heavy lifting with workflows that can automatically move and update data, and more. There's also [extensions](#) to add data from Google Maps, integrate document signatures and file uploads, and more.

- **Price:** From \$15/user/month for basic app features
- **Skill Level:** Intermediate—there's more options to tweak, but you can make advanced workflows and set strict permissions

*For a deeper look at features and pricing, see our [QuickBase review](#).*

## Any Form App

*for doing more with simple forms you already use*

The screenshot shows a web-based form builder interface. At the top, there's a menu bar with 'File', 'Edit', 'View', 'Insert', 'Responses (0)', 'Tools', and 'Help'. A 'Send form' button is visible in the top right corner. Below the menu, there are several tabs: 'Theme...', 'Choose response destination', 'Accepting responses', and 'View live form'. The main content area is divided into two sections. The first section, 'Form Settings', contains a checkbox for 'Show progress bar at the bottom of form pages'. The second section, 'Page 1 of 1', contains a form titled 'Untitled form' with a 'Form Description' field, an 'Untitled Question' with a radio button for 'Option 1', and an 'Add item' button. Below this is a 'Confirmation Page' section with a text box containing 'Your response has been recorded.' and three checkboxes: 'Show link to submit another response' (checked), 'Publish and show a link to the results of this form to all respondents', and 'Allow responders to edit responses after submitting'. A 'Send form' button is also present at the bottom of the confirmation page.

This chapter started off by telling you why a form isn't enough—and it really might not be on its own. But a form can be the first part of a series of apps that, together, can help you do a lot more.

You'll want to make your form first, adding fields for everything you need to collect, and possibly making more forms for other things you want to save. Then, you'll need to save your data to another app where it's easy to access—you could copy it to a [Google Docs spreadsheet](#), or to [Smartsheet](#) where you can also update entries. You could even use Zapier to connect a form to a MySQL database, sending each new entry into the database. Alternately, if you use Google Sheets to make your form, your data will already be in a spreadsheet—and if you use [iFormBuilder](#), you can push updated info back to your form's own database.

Then, you'll need a way to view and sort through your data—that's where the spreadsheet comes in. You can make new pages in your spreadsheet that let you visualize your data in charts and graphs, sort it with Pivot Tables, and use the simple filter and search tools to

organize your data. And if you want to do anything else with your apps—send email notifications, publish blog posts, etc.—you can use Zapier along with your form or spreadsheet to trigger everything else you need done.

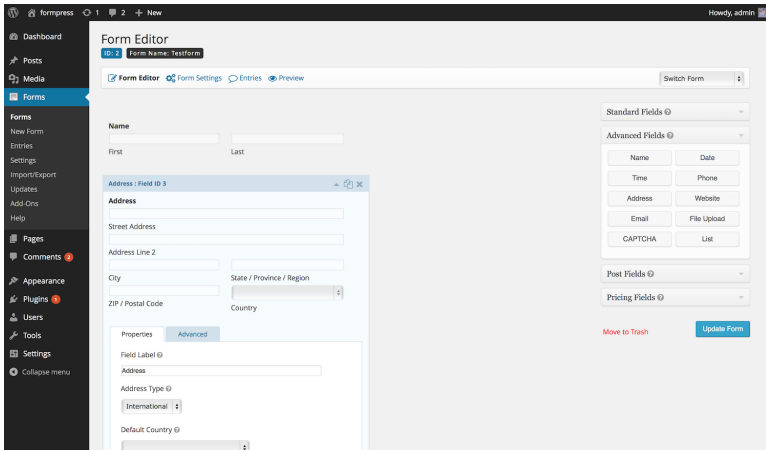
By the time you're done, you'll have [built your own app with a form](#), and won't need to worry about setting up a “real” database. What really matters is that you're getting your work done in a tool that works for you and your team.

- **Price:** From free—and no additional cost if you're already using a form builder
- **Skill Level:** Intermediate—easy to make a form, but you'll have to work harder to make your data useful

Jump back to Chapter 2 for a roundup of the [best online form builder apps](#) to find a great app to make forms, then check Chapter 5's [form automation guide](#) for ways to make your form work more like a custom-built app.

## **WordPress + a Form Plugin**

*for self-hosted internal tools integrated with your blog*



Yes, it's a blog engine. Yes, it's not your typical app builder. It's not even your typical form builder. But [WordPress](#) is built on a MySQL database, and if you're running it on your own servers, you can turn a WordPress installation into a feature-filled app that might not even include a blog.

You'll first need to install a WordPress form builder plugin—[Gravity Forms](#), [Formidable](#), and [Ninja Forms](#) are all great options. You'll build a form with your form builder, and then whenever your form is filled out, your data will show up in your MySQL database. Now, you can use the form plugin's own features to display your form data in WordPress, or you can build your own MySQL queries or [MySQL plugins](#) to display your database info inside your own pages in WordPress.

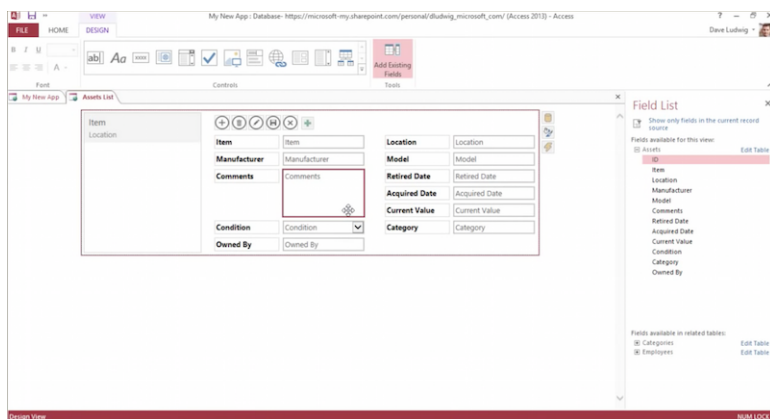
It'll take a bit more work, but you'll end up with something almost as customizable as a hand-built MySQL app without the headaches of software development.

- **Price:** Free, plus form plugin and hosting costs
- **Skill Level:** Advanced—easy to make a basic form, but accessing the database will take more work

*For a deeper look at features and pricing, see our [WordPress review](#), then check our [Gravity Forms review](#) for info about a compatible form plugin.*

## Microsoft Access

*for building tools on your PC with Office integration*



Microsoft Access was one of the original apps in the database-building space, and today it's still one of the easier tools out there. If you use a Windows PC for your work, and already have Microsoft Office, you can start making your own internal tools for no extra cost. They'll be tied to your computer, but that might work for a small business.

Or, you can use Access 2013 with Sharepoint or OneDrive Pro to [build web apps in Access](#). You'll use the same set of tools to lay out your interface and database tables inside Access, and it'll turn them into an HTML5 and Javascript powered web app. You'll then publish it to Sharepoint, and let any of your team members add and view data online or in your intranet, just as with these other database builders. The main difference is that you'll need to use Access on a PC to build and edit your internal tool, and you won't be able to



integrate with other apps as easily.

- **Price:** From \$12/user/month for [Office 365 Business Premium](#) or [ProPlus](#), including Office apps and online storage for Access web apps.
- **Skill Level:** Advanced—designing an app on your PC and uploading it to Sharepoint will take a bit more work than most of these other tools

If you want to build database-powered tools that only run on your computer and don't have a web app, [LibreOffice Base](#) is another database builder that's part of the LibreOffice (or OpenOffice) suite. It's free, and runs on Linux, OS X, and Windows, so that could be another great option for offline tools.

### 3. Put Your New Internal Tool to Work

“Although I have never written a line of code in my life I was able, with the video tutorials, to build a decent database and interfaces.” Matthew Whittall, Knack database user

Once you've built a database-powered internal tool, you might be tempted to stop there. But don't: Your internal tool might be useful on its own, but it'll be far more useful if you integrate it with other apps to automatically import data, send notifications, and more.

Your database builder may include features to send notifications and perhaps will let you import data from a spreadsheet or other services. For everything else, you can connect your internal tool to Zapier and give it features from the hundreds of apps Zapier supports.

Here's some ideas from other teams who've built internal tools with these database builders:

## Send Notifications

Your new internal tool may be able to send email notifications when new data is added, but after that it hits a brick wall. For everything else, you'll need Zapier.

Notifications about everything that happens in your internal tool might get tedious, but with filters in your Zapier integrations and workflow automations in your own app, you can get just the notifications you want. And, you can get them where you want—in your team chat app, via SMS or push notification, or even in a more customized email.

And, you can send notifications to your clients, contacts, and others that are important to your business from your internal tool if you want. The [Web Gumption](#) team, for instance, sends text messages to their clients with lead information directly from their Knack-powered tool.

Personalized features like that can surprise and delight your customers, as Web Gumption found out. “Our clients loved us because we opened up a whole new set of features for them,” says Web Gumption’s Rick Maggio.

### Zaps:

- [Send SMS message via Twilio when Knack form is filled out](#)
- [Get notified in Slack whenever a new entry is added to your TrackVia database](#)
- [Send an email with Gmail when a new record is added to Zoho Creator](#)
- [Send a fax from Phaxio when your Gravity Forms form is filled out](#)

## Collect More Data

You can use the forms in your new internal tool to gather data as an easy way to add new customer contact info and more, but don't stop there. The best thing about your new internal tool is that you can update data in your database through Zapier, so you can use that to keep collecting more data automatically.

Marketer [Adrien O'Leary](#) uses this feature to create an entire workflow from his Knack database for managing clients. His clients will add email addresses to the Knack form, and a Zapier integration will then send a FluidSurveys invite to each of those contacts. Then, when they fill out the survey, it'll add the data back to Knack, along with other info from emails they've sent. Finally, it'll send an email via Mandrill when the project is complete.

**Zaps:**

- [Send FluidSurveys invites for new Knack form submissions](#)
- [Add info from emails in Mailparser to your Knack database](#)
- [Send emails from Mandrill whenever your Knack form is filled out](#)

You'll need to think through everything you're collecting in your internal tool when you're initially putting it together. Then, if you think about all the ways you can connect your new tool to other apps, you can make an even more powerful workflow that can do more than you'd ever imagined. "To me, using Knack together with Zapier feels like Access on steroids," O'Leary says.

## Stay Connected

"Without it, we'd have to work with the more expensive and less-flexible lead distribution systems." Rick Maggio, Web Gumption

Building your own [CRM](#) (contact relationship management) tool is perhaps one of the best use-cases for these database builders, since the things each team needs to track about contacts, leads, prospects and more varies widely. Instead of worrying about customizing another tool, you can add fields for just the things you need to track, and make the workflow optimized for your team.

And then, you can optimize it for others, too. “Knack is the heart of our lead distribution system,” Maggio says. “We use knack to capture lead information, store it, send it to clients and report to clients.”

Internally, Knack is their team’s full CRM. But then, thanks to Knack’s flexibility when integrated with Zapier, they’re able to add extra features for their customers. They send emails with lead information to customers with Mandrill, or used Zapier’s SMS integration to send the lead info via SMS.

Most impressively, though, they’ve used Zapier to add leads to their clients’ own CRM apps automatically from their Knack database. “They no longer had to add leads manually to their CRMs, Zapier did it for them!” says Maggio. That’s enough to impress any client.

### Zaps:

- [Add Highrise contacts from your Knack form](#)
- [Add TrackVia database entries as new HubSpot contacts](#)
- [Create Pipedrive Deals via Gravity Forms](#)
- [Create Podio Items from New CallTrackingMetrics Calls](#)
- [Create leads in Salesforce from Ninja Forms form submissions](#)

Whether you’re using your new internal tool to collect customer data and send it to a CRM, or want to make an ingenious new workflow like the Web Gumption team did, Zapier’s ready to connect to any apps you need.

## Import Data

The new internal tool you've built might have forms, but you also may have other forms you're already using. There's no reason to pull them off your site now—just integrate them with your new tool, and they can become an essential part of your new workflow.

Fisher's team at Lotus Gardens uses Wufoo forms to let people create reservations, sign up for memberships, and more at their Tibetan Buddhist center. "We collect our program registrations and shuttle reservations through Wufoo and then transferred everything to Excel spreadsheets," Fisher says. "This created a nightmarish situation for staff—trying to manage, share and keep consistency in the sheets."

Once they discovered TrackVia and built a tool to manage all of their members, they integrated all of their Wufoo forms with their database, which simplified everyone's lives. Now, they can add each member's data when they sign up, then update the info when they create reservations for retreats. "The ease of getting our registrations/reservations through Zapier available for processing in TrackVia within in seconds keeps staff up to date and happy," Fisher says.

- [Zap: Save Wufoo form entries to TrackVia database](#)

Your data might be elsewhere: you might be storing it in a Google Docs Spreadsheet, or it might be coming to your company in emails. Either way, you can connect them all to your new app with Zapier, to manage all of your data in one place.

**Zaps:**

- [Add new Google Sheets rows to Zoho Creator as records](#)
- [Copy emails from the Zapier Email Parser to your Knack database](#)
- [Save Typeform form entries to a MySQL Database](#)

## Manage Finances

Finances are one of the most important—and annoying—things to manage. But with your own internal tool for finance that records every bit of financial info you need and can put that data to work automatically, you just might find that managing finances isn't so stressful.

That's what O'Leary did with Knack, using it to build another internal tool to track everything about his finances. Using Zapier, every new sale and its related data from PayPal is stored in Knack. Knack then calculates the fees from each transaction's currency, and send them to Freshbooks for his accountant's records. Then, once a week, Knack notifies his accountant about the new fees. It's a full finance system that's customized just for his needs.

### Zaps:

- [Save PayPal payment data to your Knack database](#)
- [Create FreshBooks invoice from Knack records](#)
- [Send an email when a new record is added to your Knack database](#)

InVigor Law Group added similar features for their own team's invoicing needs into their time tracking internal tool. Whenever a new customer is added to their TrackVia database, Zapier creates a new client in Freshbooks automatically. Once that client pays, Zapier sends the Freshbooks info back over to TrackVia.

### Zaps:

- [Create new FreshBooks clients from TrackVia entries](#)
- [Record FreshBooks payments in your TrackVia database](#)

Your own accounting needs may be different. You might need to send a receipt to customers, log sales to a spreadsheet that's

shared with your accountant, or track canceled orders from your eCommerce system. Either way, you can connect your finance apps to your new internal tool and keep everything flowing smoothly.

## Assign Tasks

When you're working in a busy team with a lot going on, you'll need a simple way to keep track of what everyone's working on. That's why the TrackVia development team made their own TrackVia-powered internal tool to manage tasks, to keep track of their projects and the tasks those projects entail.

The only problem was, the tasks started getting overwhelming. "When you are assigned a new task as a developer you get an email but that can flood your inbox pretty quickly," says TrackVia frontend developer Taylor Rose.

To solve that, he connected TrackVia to Slack, so he'd get a notification in Slack each time a task is assigned to him. "I receive desktop notifications on Slack whenever a new task is assigned to me," says Rose. "I can very quickly click into the task and assess the priority of it or start a discussion with the team about requirements." It keeps him connected to his team, without overloading his email inbox.

- **Zap:** [Get notified in Slack whenever a new entry is added to your TrackVia database](#)

Depending on your team, you might use your internal tool itself to track tasks, or you might want to use your tool to create tasks in the [to-do list app](#) you're already using. Either way, a Zapier connection can keep things flowing and help you stay on top of what you have to do without overwhelming you with notifications.

**Zaps:**

- [Create a new Asana task when a new record is added to Zoho Creator](#)
- [Add new Podio task to Todoist new task](#)
- [Create Evernote Reminder from Knack](#)
- [Create Trello cards from Ninja Forms form submissions](#)

## Create Documents

Believe it or not, you can use your database-powered internal tool to create contracts, certificates, licenses, letters and any other form documents your team needs. You likely won't build a new word processor on your own, but you can use integrations with document template apps to create formatted documents from your tool.

That's how the [Claim Bees](#) team uses their auto insurance claims internal tool that they built with Knack. "I use my Zaps to take data from Knack and populate forms in WebMerge," says Claim Bees founder Matthew Whittall. "I automatically produce reports, invoices, charts, and more. The Zapier filter functions enable me to create some fairly complex routing rules, very easily."

### Zaps:

- [Create documents from WebMerge from Knack entries](#)
- [Create Personalized Documents from Zoho Creator with WebMerge](#)
- [Create Personalized Documents from Gravity Forms with WebMerge](#)
- [Create Personalized Documents from Podio with WebMerge](#)

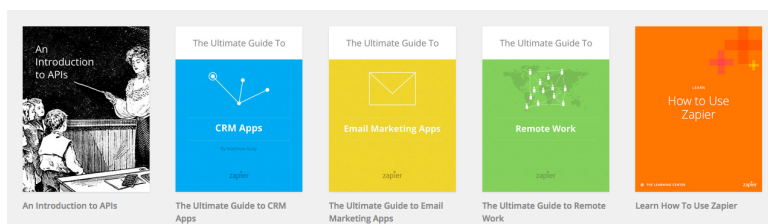
Being able to simply create form documents is the main reason Whittall loves Knack. "I used to do the same job for my old employer—there our system didn't fit the requirement and the output was a barely structured e-mail," he says. "Now our work looks great for a fraction of the cost."



If you need to create your own form documents often, there's no need to open your word processor and copy data every time. Instead, just use the data you're already collecting in your new internal tool, and send it to WebMerge to fill in and create documents automatically.

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## Go Learn Something New!



Now that you know everything you need to build amazing forms and surveys, and use them effectively in your work, it's time to learn something else. The Zapier team has written an entire library of app guides and resources to help you get the most out of the apps you need in your work. Here are some of our most popular eBooks that you can start reading next for free:

- [An Introduction to APIs](#)
- [The Ultimate Guide to CRM Apps](#)
- [The Ultimate Guide to Email Marketing](#)
- [The Ultimate Guide to Remote Work](#)

Then, there's the Zapier blog, where you'll find articles like those included in the chapters of this book, along with articles about productivity, remote work, and more. Be sure to [check out our blog](#)

[and sign up for our email newsletters](#) to be among the first to know whenever we publish new articles, free books and more.

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*Written by Zapier Marketer [Matthew Guay](#).*

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