Guide to Survey and Survey Template features

Collect structured information from your organizations: build a **survey template** once, send it to as many organizations as you like, let them fill it in, and compare the answers.

Step	What you do	Where
1	**Build** a survey template with sections and questions	Management → Survey templates
2	**Publish** a version of the template	Management → Survey templates
3	**Send** it to one or more organizations	Management → Survey templates
4	Organizations **fill in** and submit the survey	Link in the invitation email
5	**Follow up, export and compare** the answers	Management → Surveys
Optional	Have the figures **filled in from your ERP**	See chapter 8

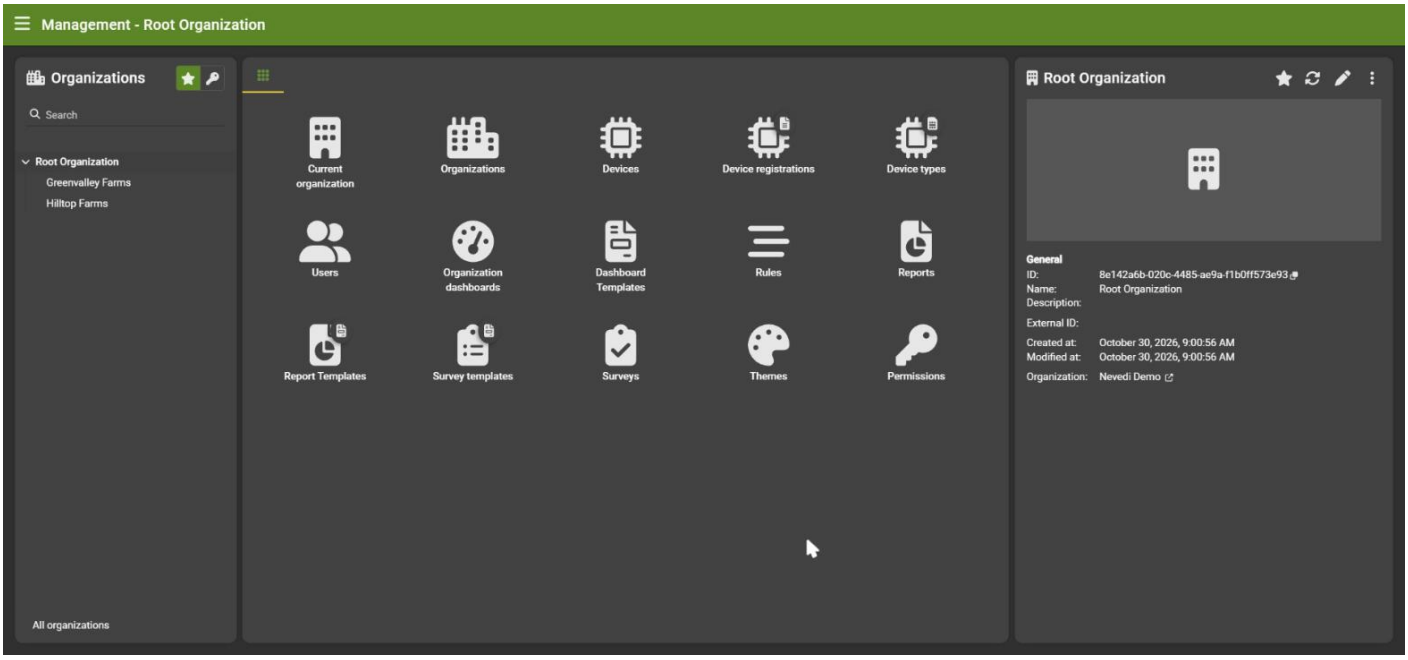
> **Good to know**
>
> - Building templates and sending surveys needs **owner** or **reseller** access on the organization.
> - Filling in a survey needs **write** access (or owner/reseller) on the organization that received it.
> - Users with read access can look at a survey, but not change it.

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1. Where to find it

Open **Management** and pick an organization. The tiles **Survey templates** and **Surveys** are the two entry points of this feature.

Tip: switch the organization list to **favourites only** (the star above the list) to keep the list short.

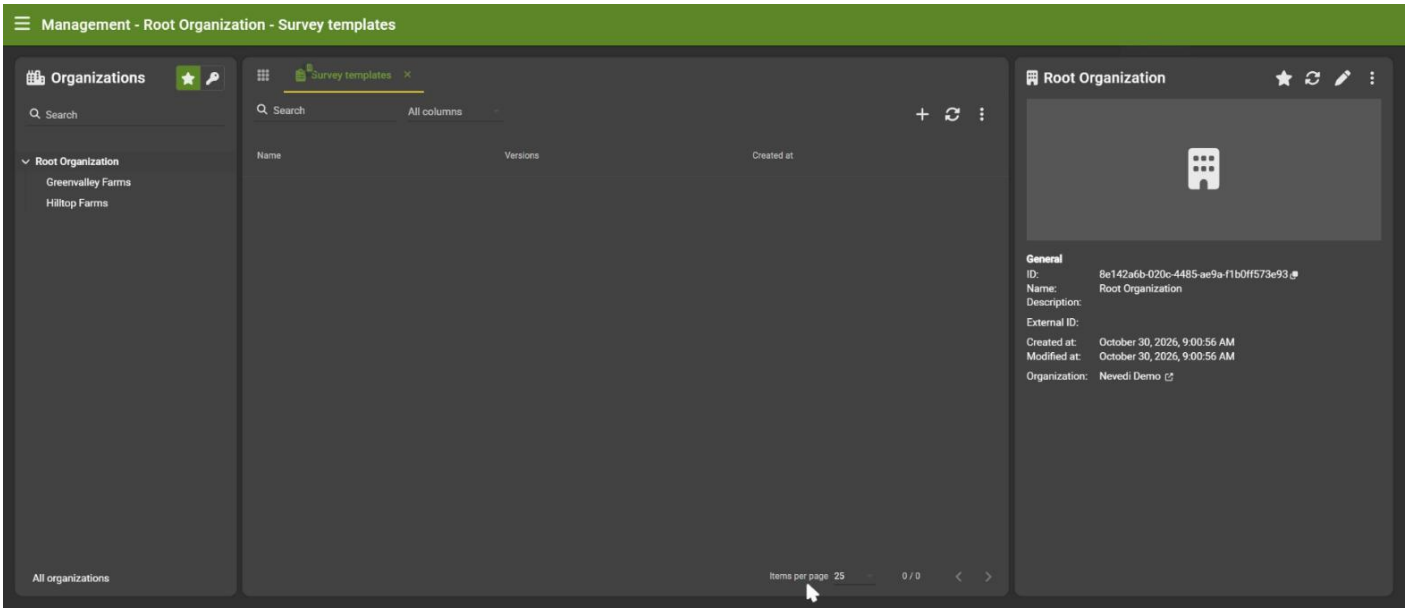


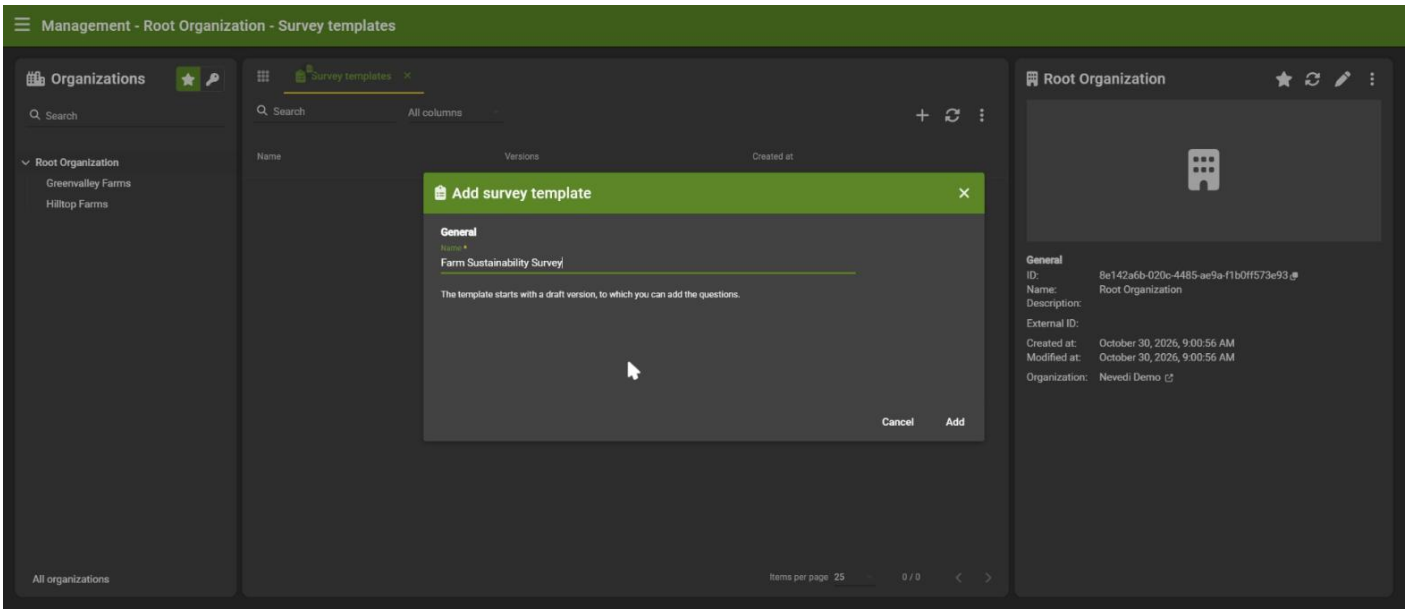
2. Survey templates

A template is the blueprint of a survey: a title, instructions, **sections** and **questions**. A template can have several **versions**, so you can improve it over time without touching surveys that were already sent.

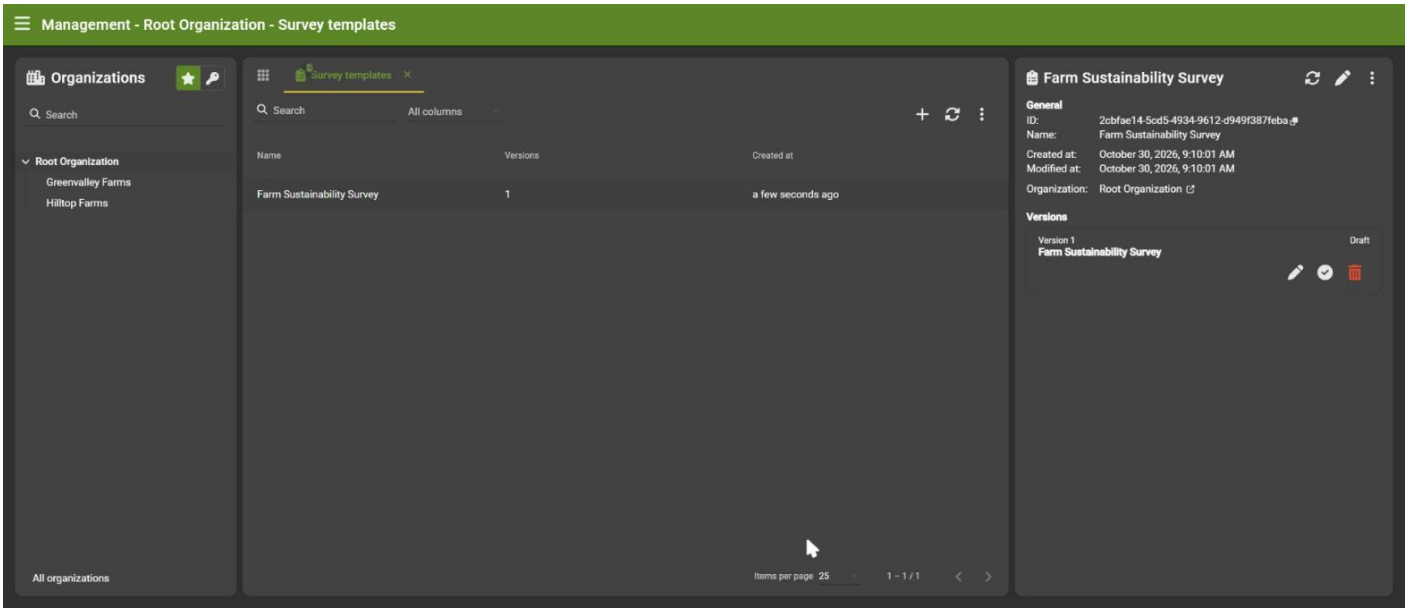
2.1 Create a template

1. Open **Survey templates**. The list shows your templates and how many versions each has.
2. Click **+**, give the template a name and click **Add**.

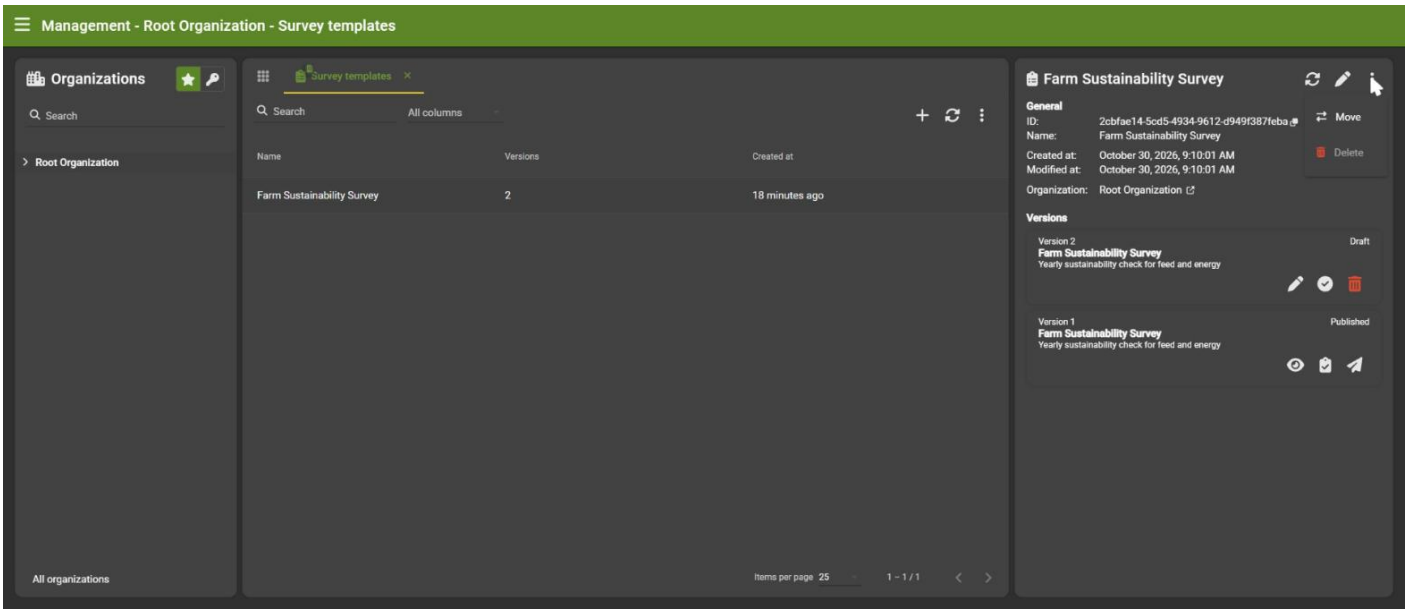




The new template starts with an empty **draft version 1**, ready to be filled with questions. Select the template to see its details and versions on the right.



The menu (⋮) of a template lets you **move** it to another organization. A template can only be **deleted** as long as no survey was sent from it.



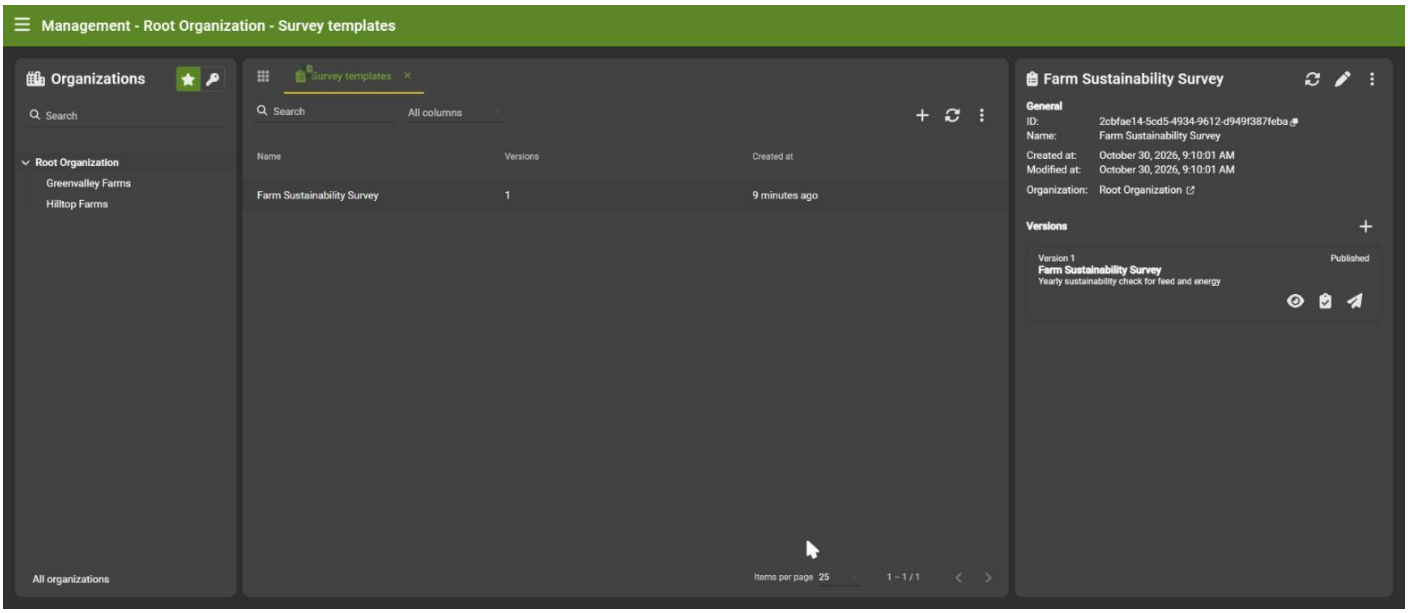
2.2 Versions

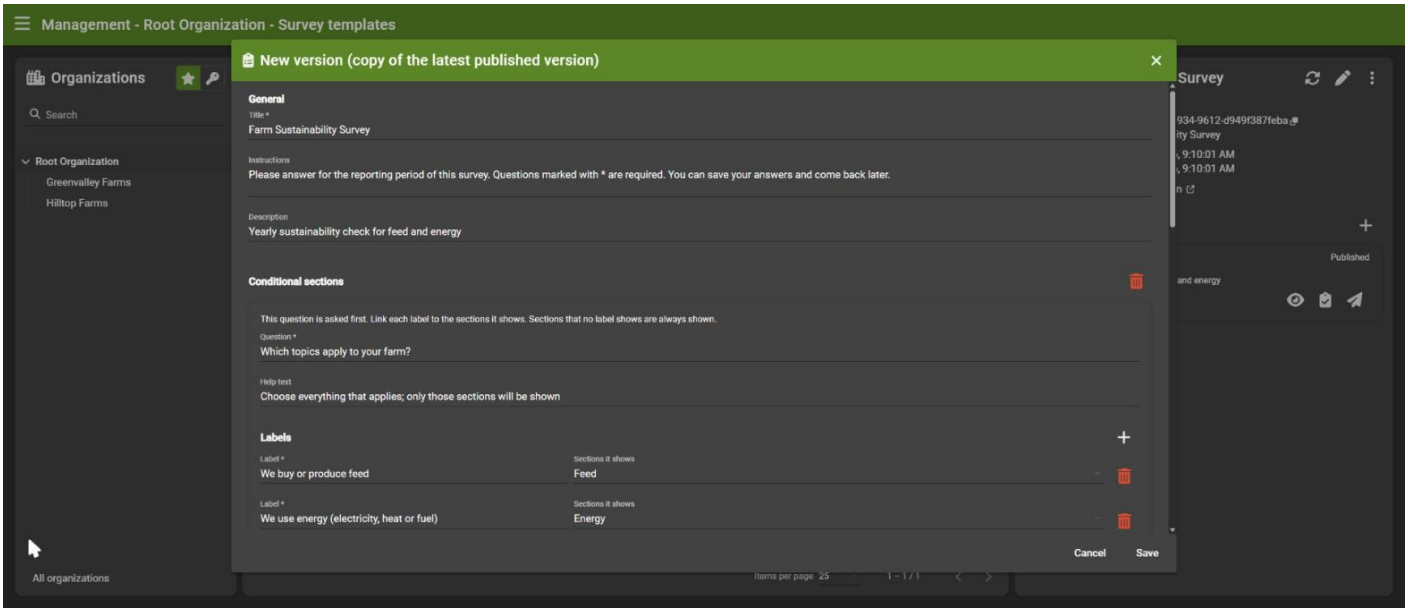
Every template has versions with a status:

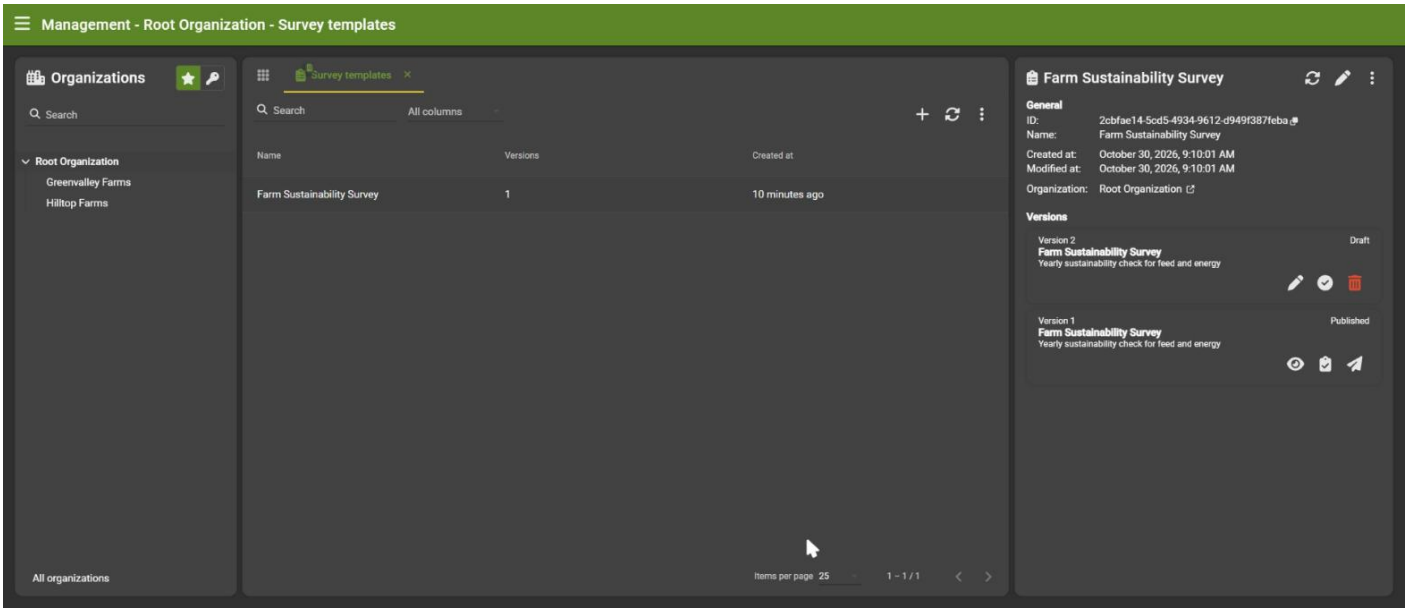
Status	Meaning	What you can do
Draft	Work in progress	Edit, preview, publish or delete
Published	Final and ready to send	View, send, see the surveys sent from it

- **Only one draft** can exist at a time.

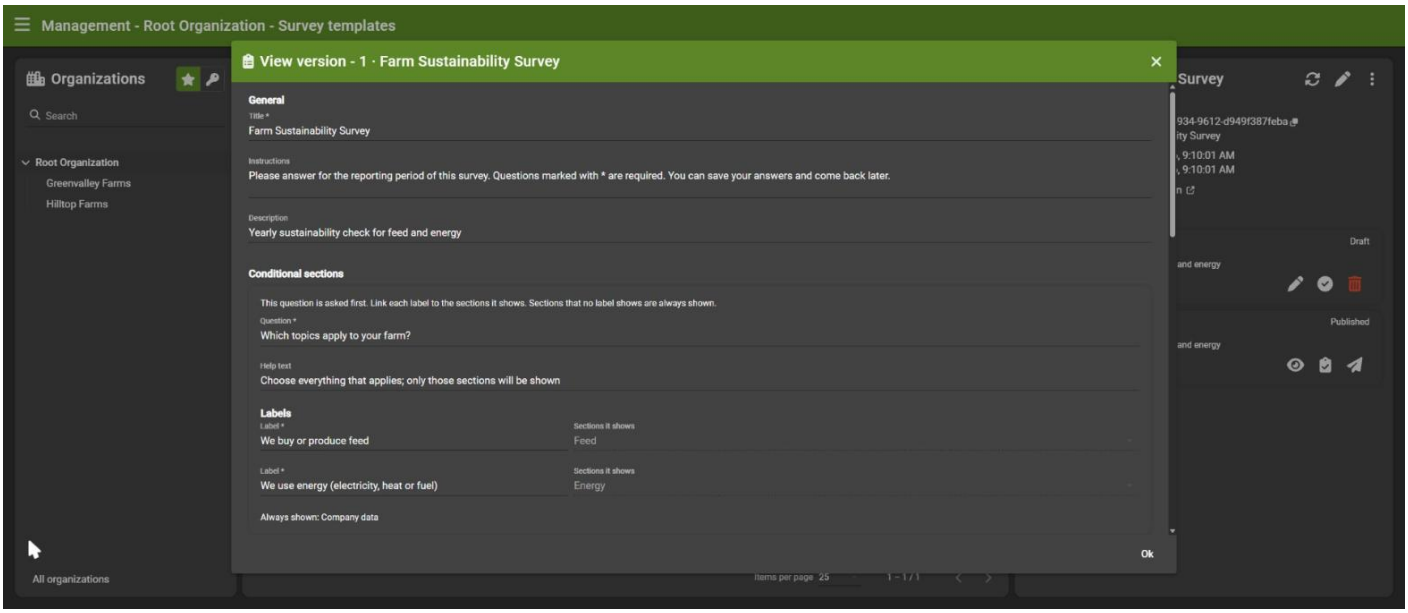
- A **published version never changes**. This keeps every survey that was sent from it consistent.
- To change a published version, click **+** next to *Versions*. The new draft is a **copy of the latest published version**, so you only change what is needed.







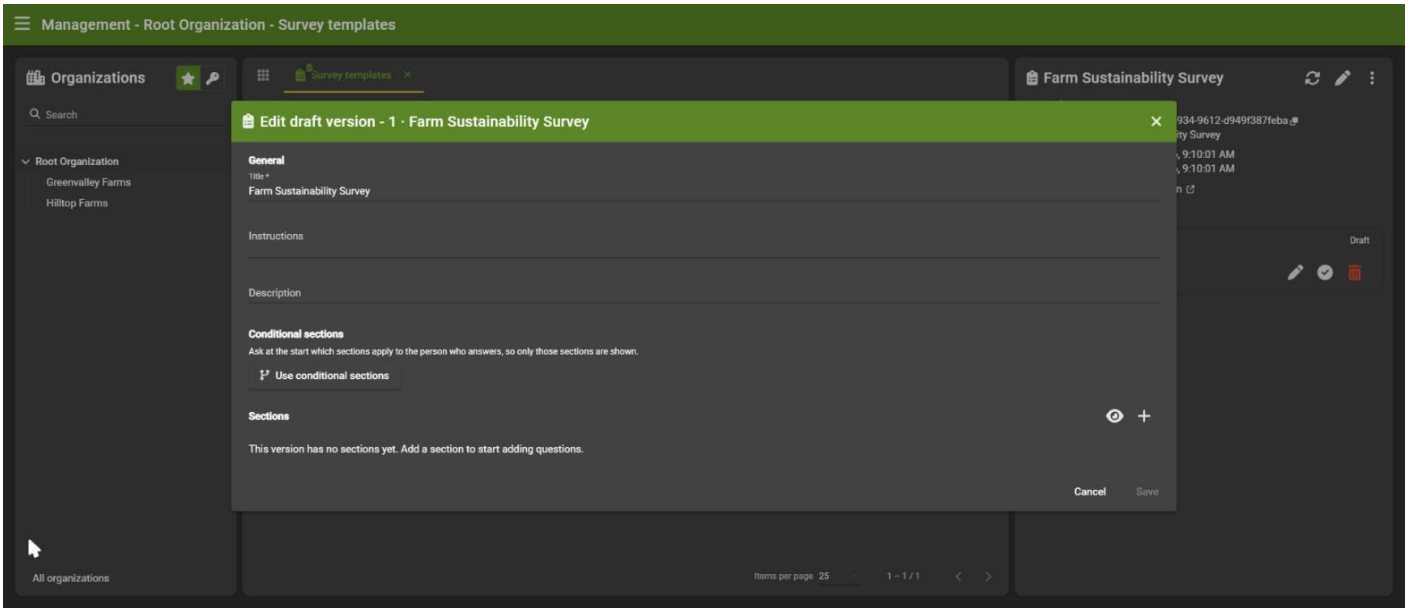
A published version can be opened **read-only** with the eye icon.



2.3 Edit a version

Click the pencil of a draft version. The editor has four parts:

1. **General**: title, instructions (shown at the top of the survey) and a description.
2. **Conditional sections**: optional, see 2.9.
3. **Sections**: groups of questions.
4. **Questions** inside every section.



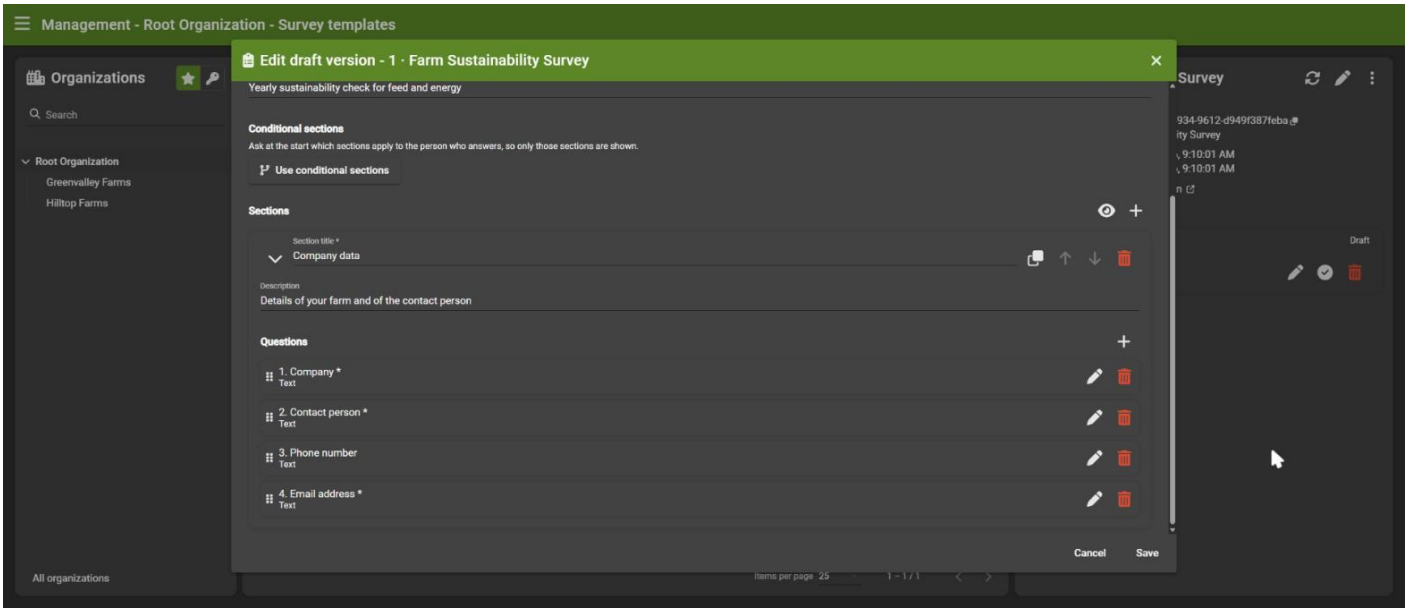
Nothing is saved until you click **Save**. Cancelling leaves the version as it was.

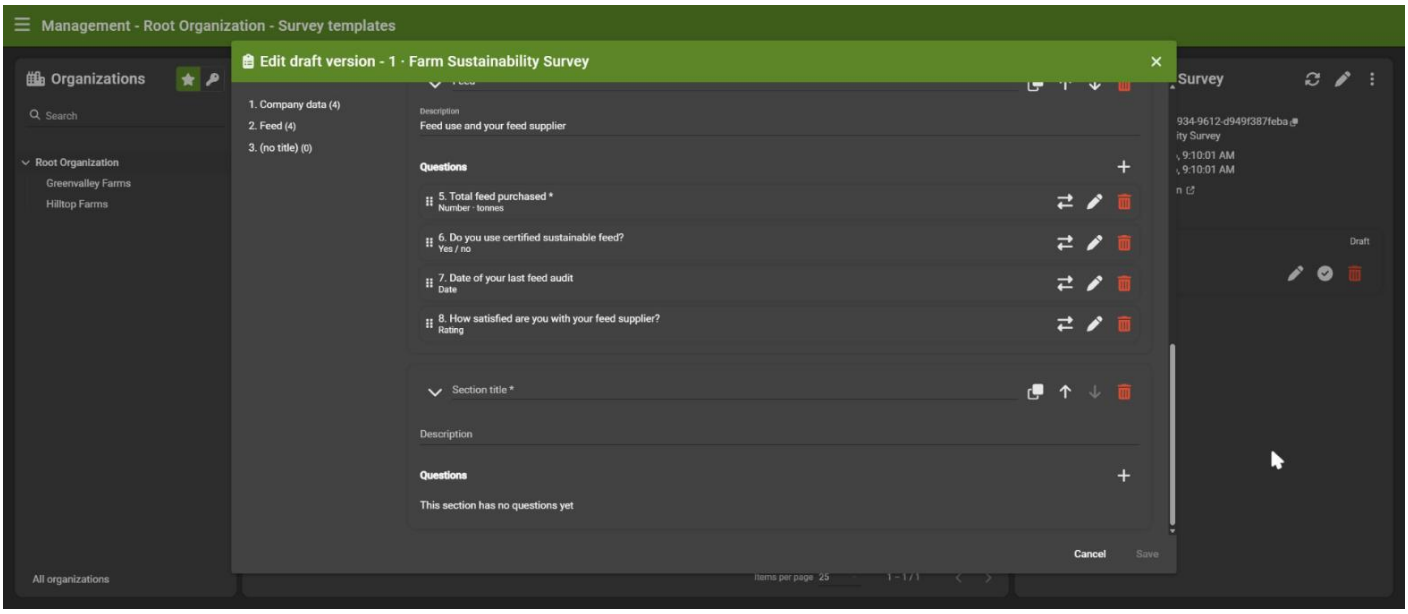
2.4 Sections

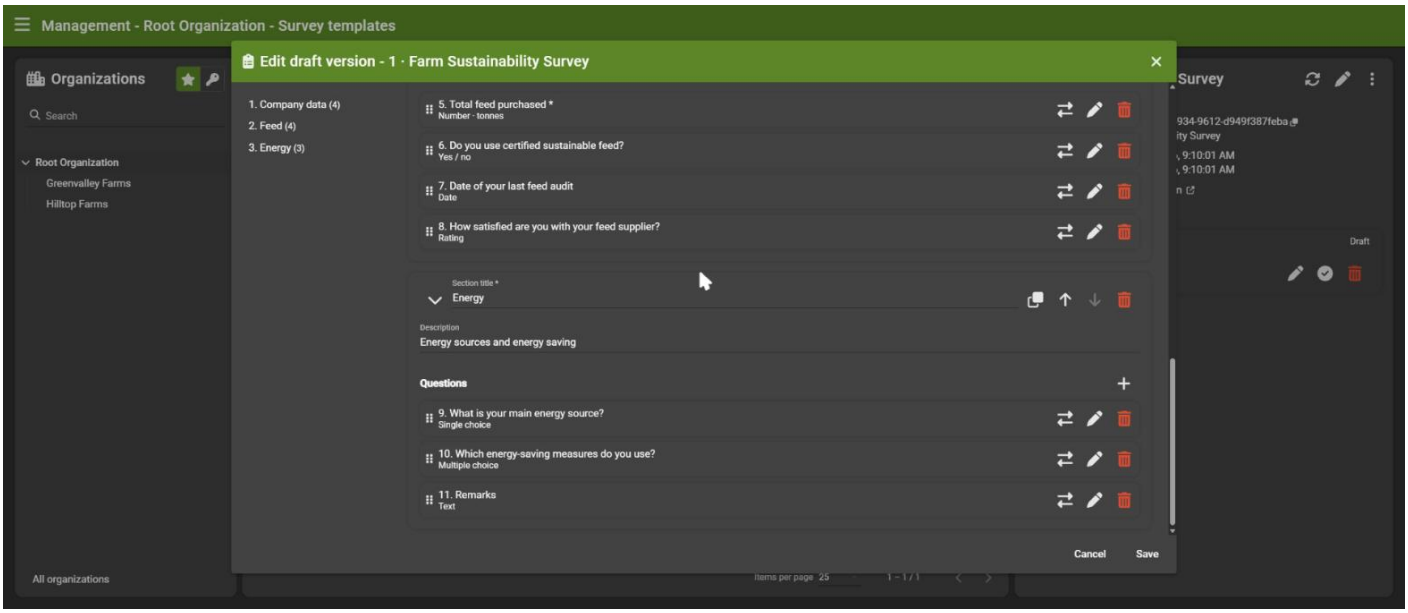
Sections group questions under a title, like chapters. In the editor you can:

- **add**, **rename** and describe sections,
- **duplicate**, **move up/down** or **delete** a section,
- **collapse** sections (single or all) for a clear overview,
- jump to a section with the **navigation** on the left.

Questions are numbered over the whole survey.







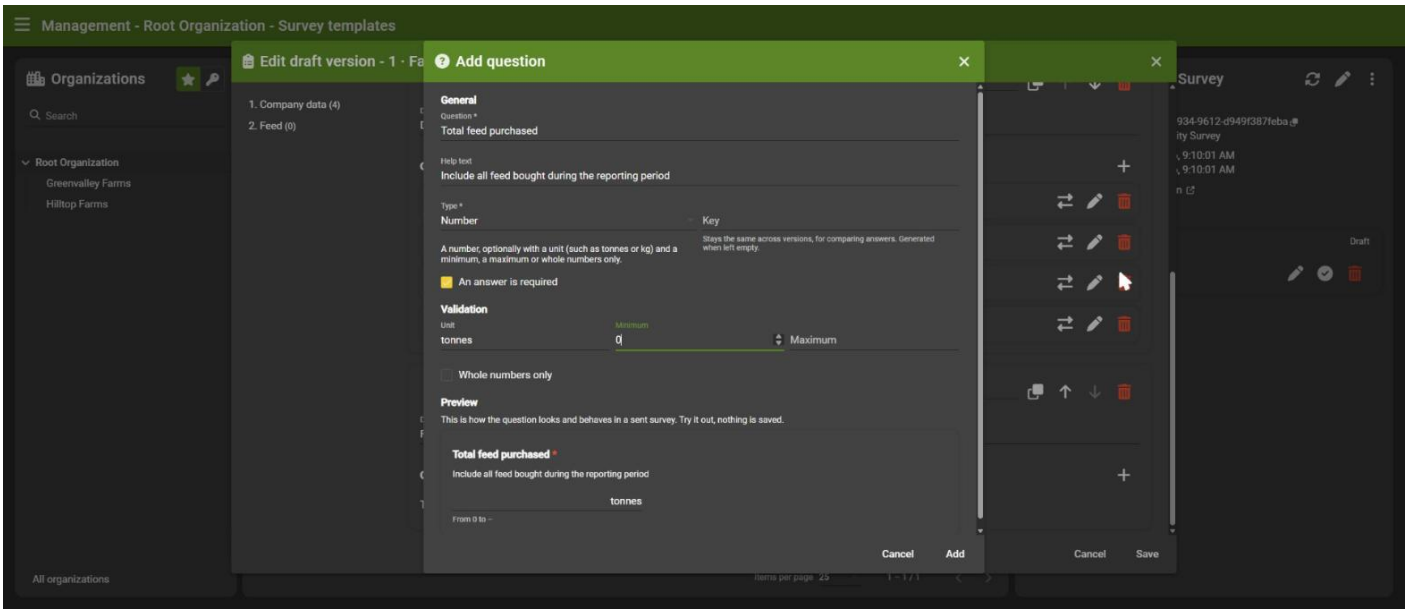
2.5 Questions

Click **+** in a section to add a question. In the question dialog you set:

Setting	Description
Question	The text people see
Help text	Optional explanation below the question
Type	What kind of answer is expected (see 2.6)
Key	Optional short name. It **stays the same across versions**, so answers can be compared over time. Left empty, it is generated.
An answer is required	The survey cannot be submitted without it

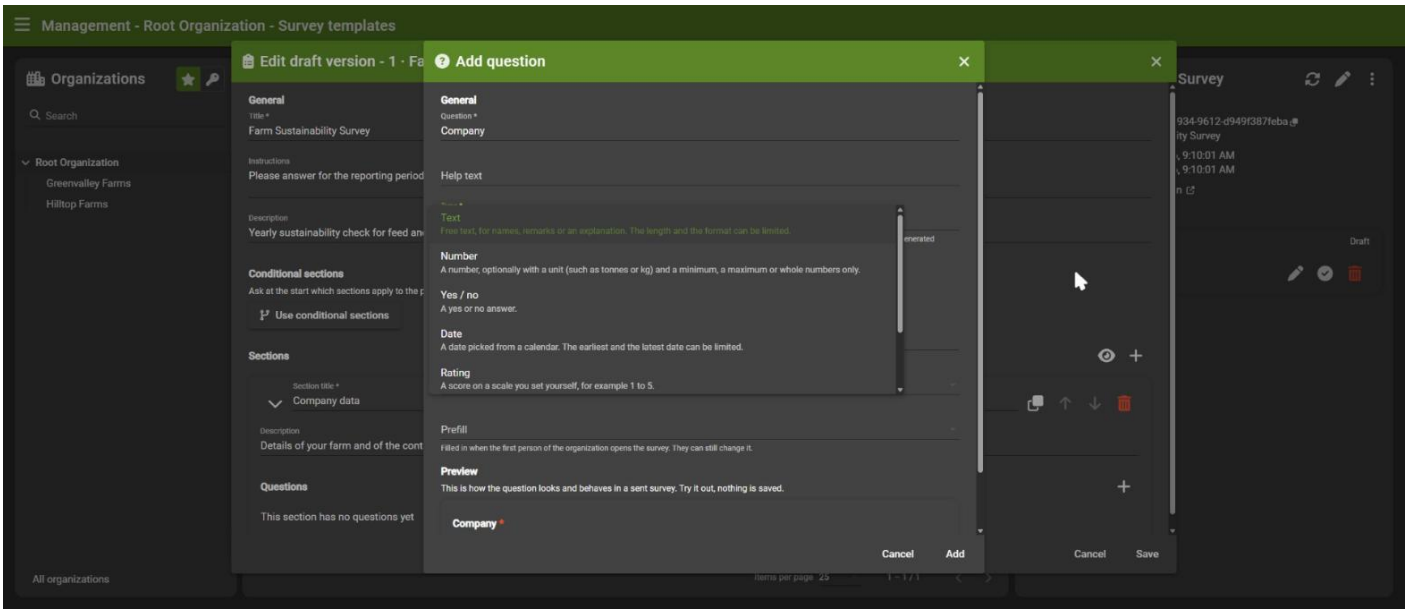
You can **drag** questions to reorder them, **move** them to another section, **edit** or **delete** them.

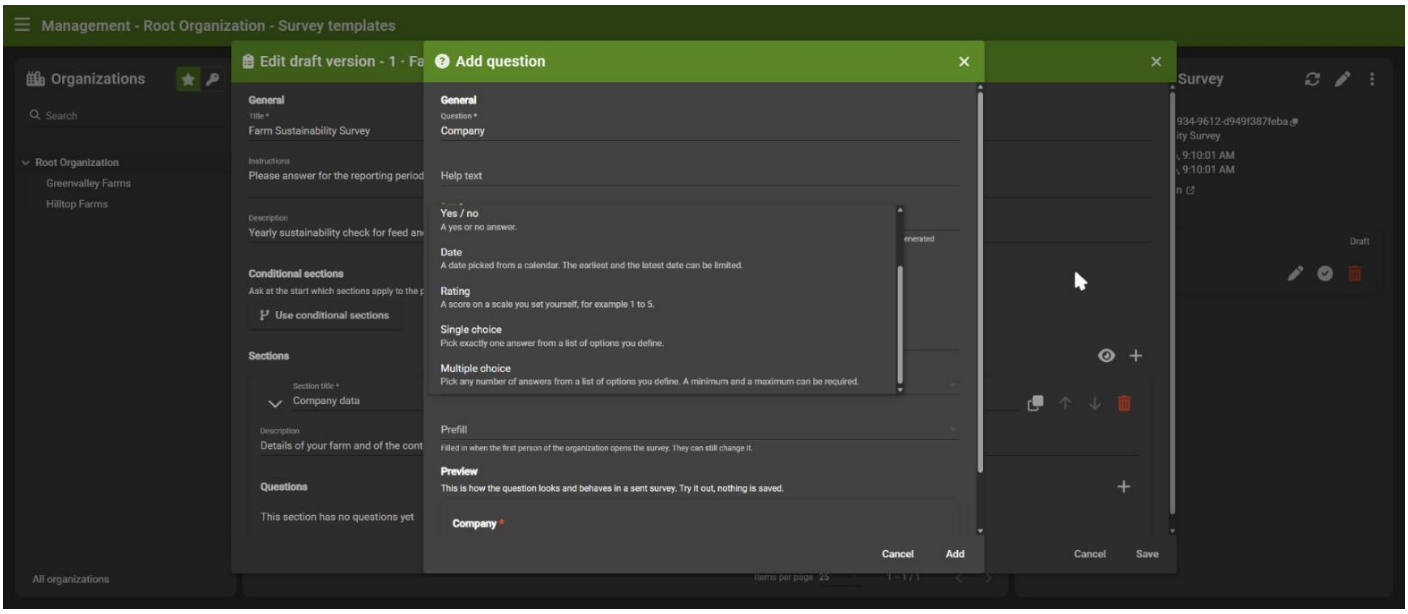
Live preview. At the bottom of the dialog you see the question exactly as the person answering will see it, and you can try it out. Nothing is saved.



2.6 Question types

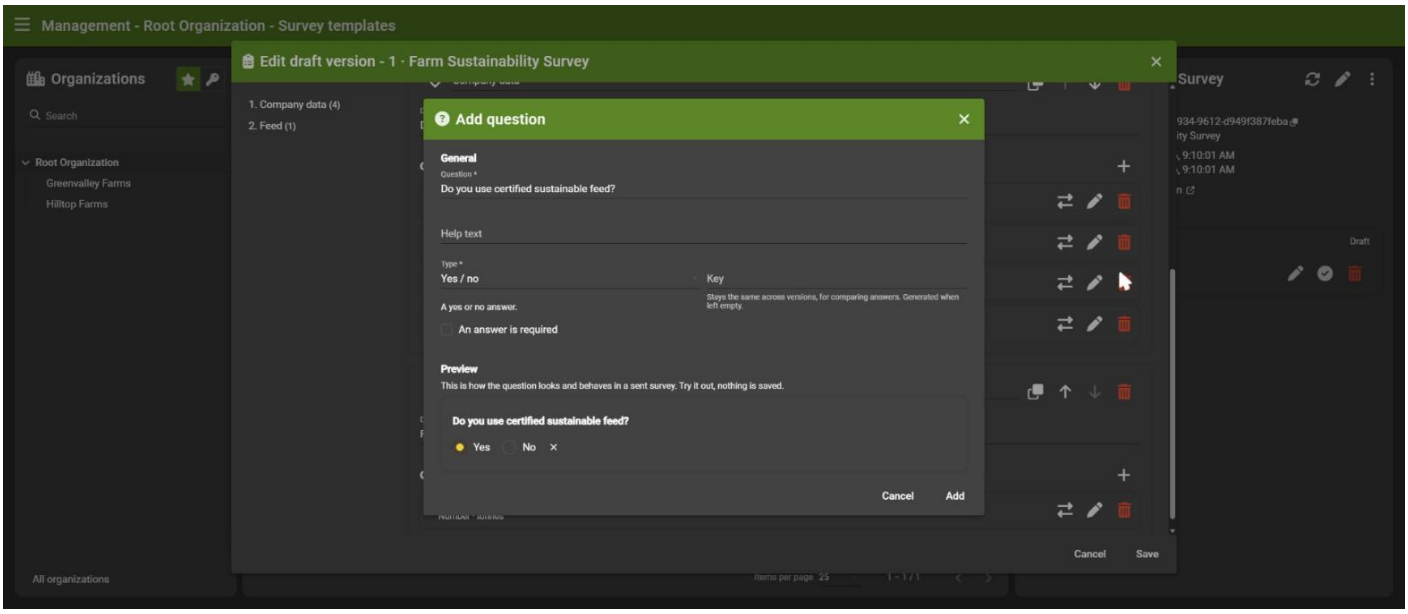
Each type has a short description in the dropdown.

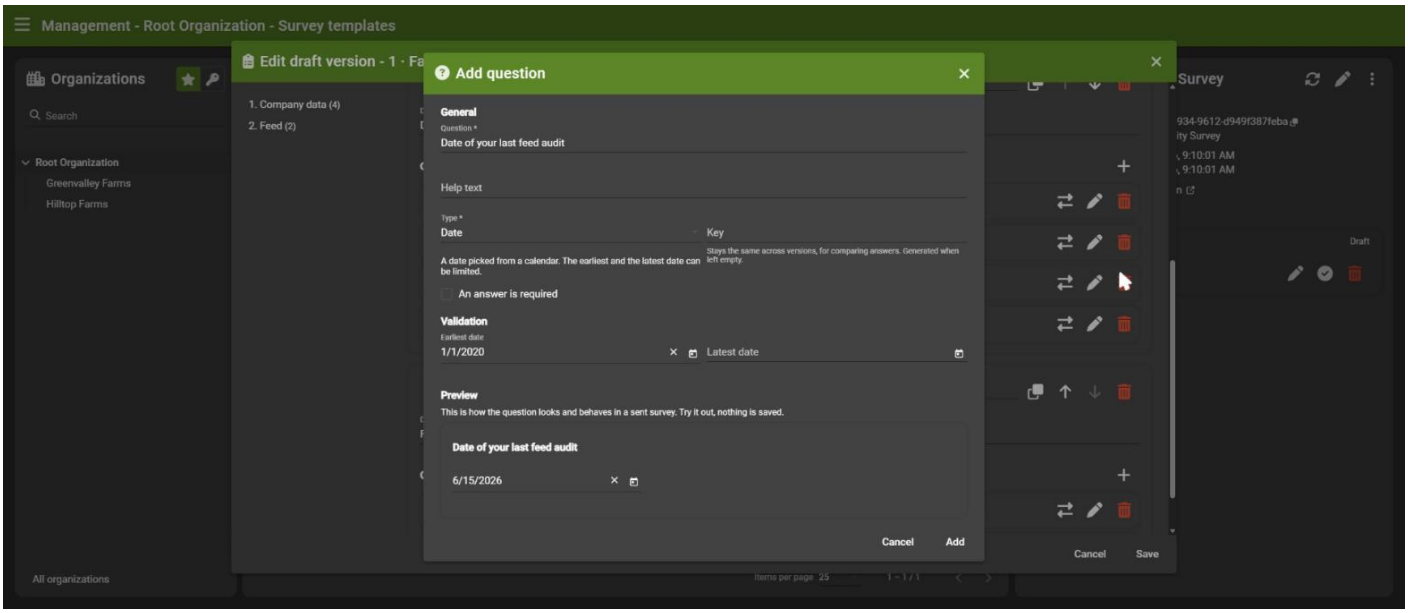


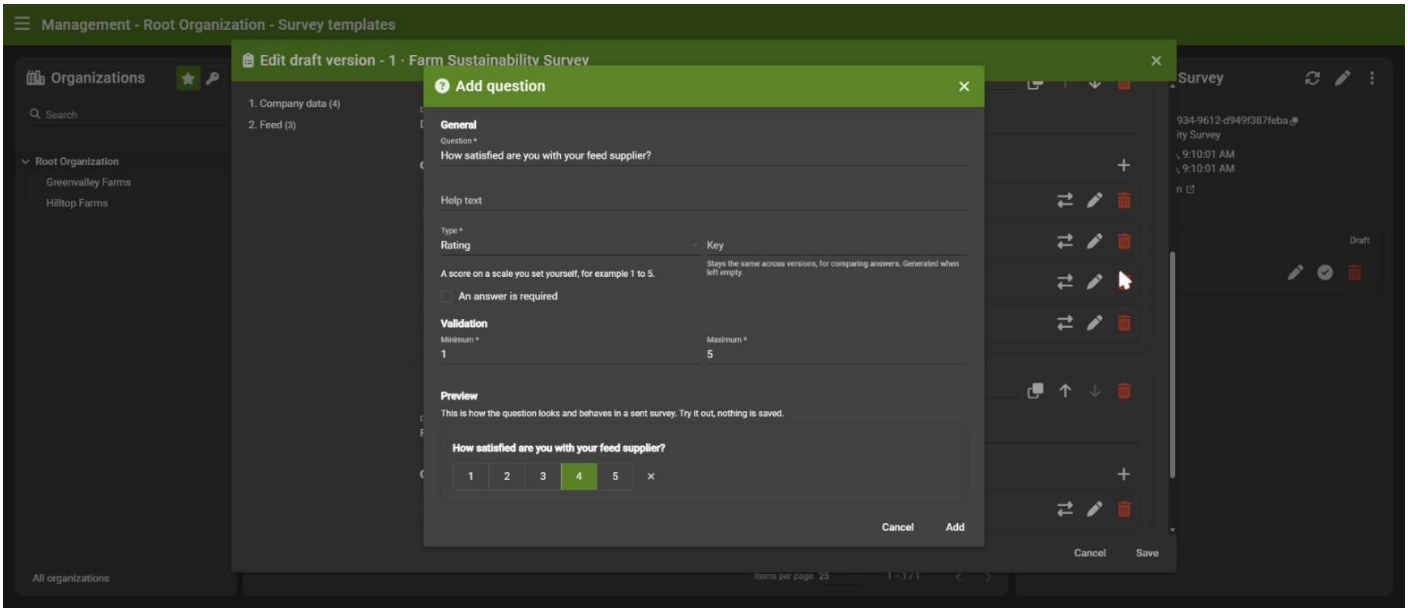


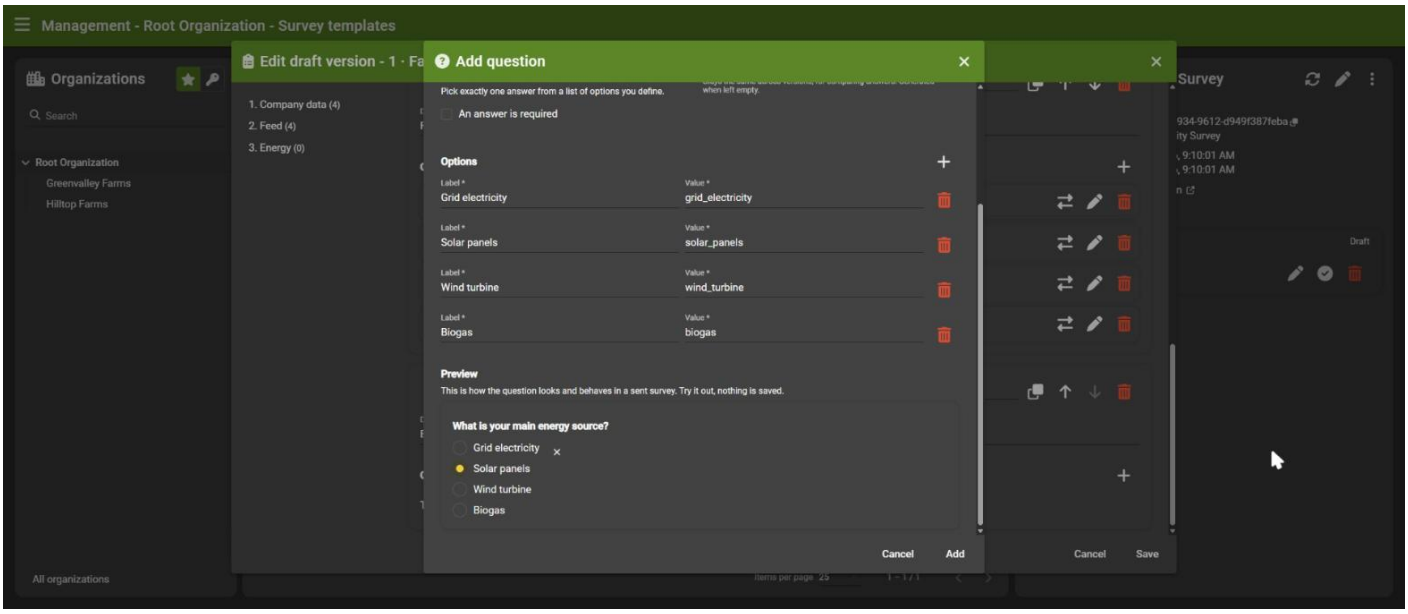
Type	Answer	Settings
Text	Free text	Minimum and maximum length, format, prefill
Number	A number	Unit (for example tonnes), minimum, maximum, whole numbers only
Yes / no	Yes or no	none
Date	A date from a calendar	Earliest and latest date
Rating	A score on a scale you define (for example 1 to 5)	Minimum and maximum
Single choice	One option	The list of options
Multiple choice	Any number of options	The list of options, minimum and maximum number of choices

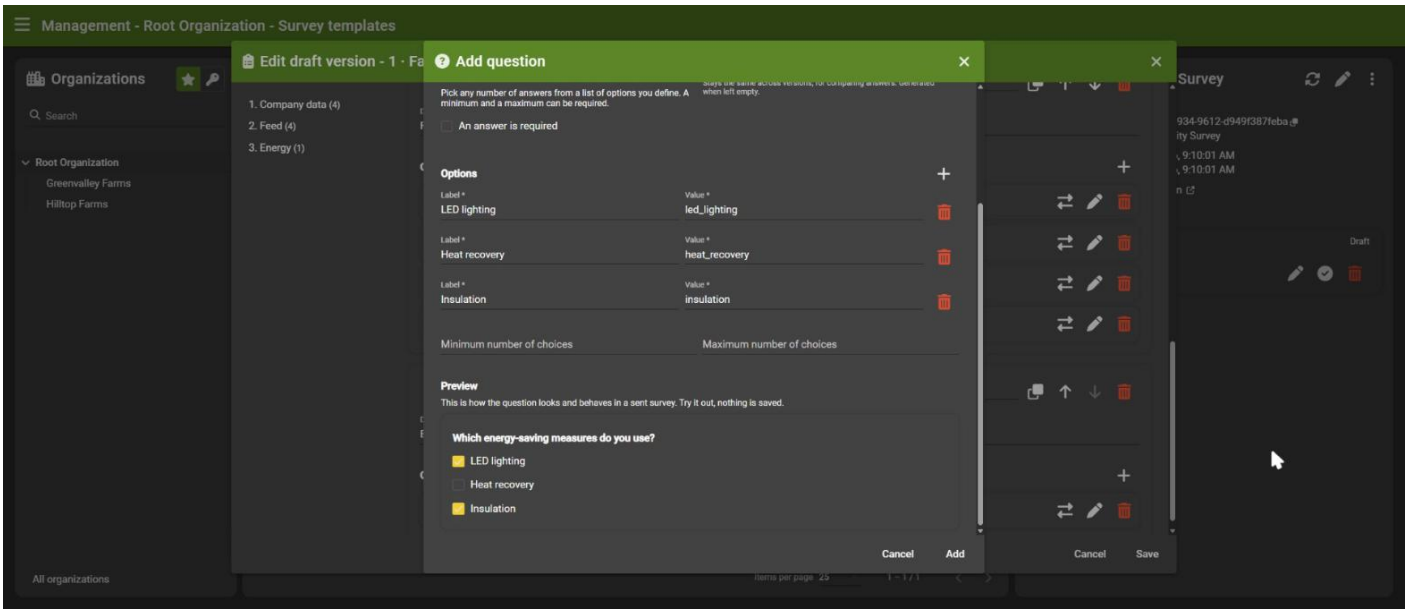
For choice questions you enter the options as **label** (shown) and **value** (stored). The value is filled in automatically from the label.


Management - Root Organization - Survey templates
Edit draft version - 1 · Farm Sustainability Survey
Organizations
Search
Root Organization
Greenvalley Farms
Hilltop Farms
All organizations
1. Company data (4)
2. Feed (1)
Add question
General
Question *
Do you use certified sustainable feed?
Help text
Type *
Yes / no
Key
Stays the same across versions, for comparing answers. Generated when left empty.
A yes or no answer.
An answer is required
Preview
This is how the question looks and behaves in a sent survey. Try it out, nothing is saved.
Do you use certified sustainable feed?
Yes
No
Cancel
Add
Survey
Draft
Cancel
Save


Management - Root Organization - Survey templates
Edit draft version - 1 · Fa
Organizations
Search
Root Organization
Greenvalley Farms
Hilltop Farms
All organizations
1. Company data (4)
2. Feed (2)
Add question
General
Question *
Date of your last feed audit
Help text
Type *
Date
Key
Stays the same across versions, for comparing answers. Generated when left empty.
A date picked from a calendar. The earliest and the latest date can be limited.
An answer is required
Validation
Earliest date
1/1/2020
Latest date
Preview
This is how the question looks and behaves in a sent survey. Try it out, nothing is saved.
Date of your last feed audit
6/15/2026
Cancel
Add
Survey
Draft
Cancel
Save


Management - Root Organization - Survey templates
Edit draft version - 1 · Farm Sustainability Survey
Organizations
Search
Root Organization
Greenvalley Farms
Hilltop Farms
All organizations
1. Company data (4)
2. Feed (3)
Add question
General
Question *
How satisfied are you with your feed supplier?
Help text
Type *
Rating
Key
Stays the same across versions, for comparing answers. Generated when left empty.
A score on a scale you set yourself, for example 1 to 5.
An answer is required
Validation
Minimum *
1
Maximum *
5
Preview
This is how the question looks and behaves in a sent survey. Try it out, nothing is saved.
How satisfied are you with your feed supplier?
1
2
3
4
5
Cancel
Add
Survey
Draft
Cancel
Save





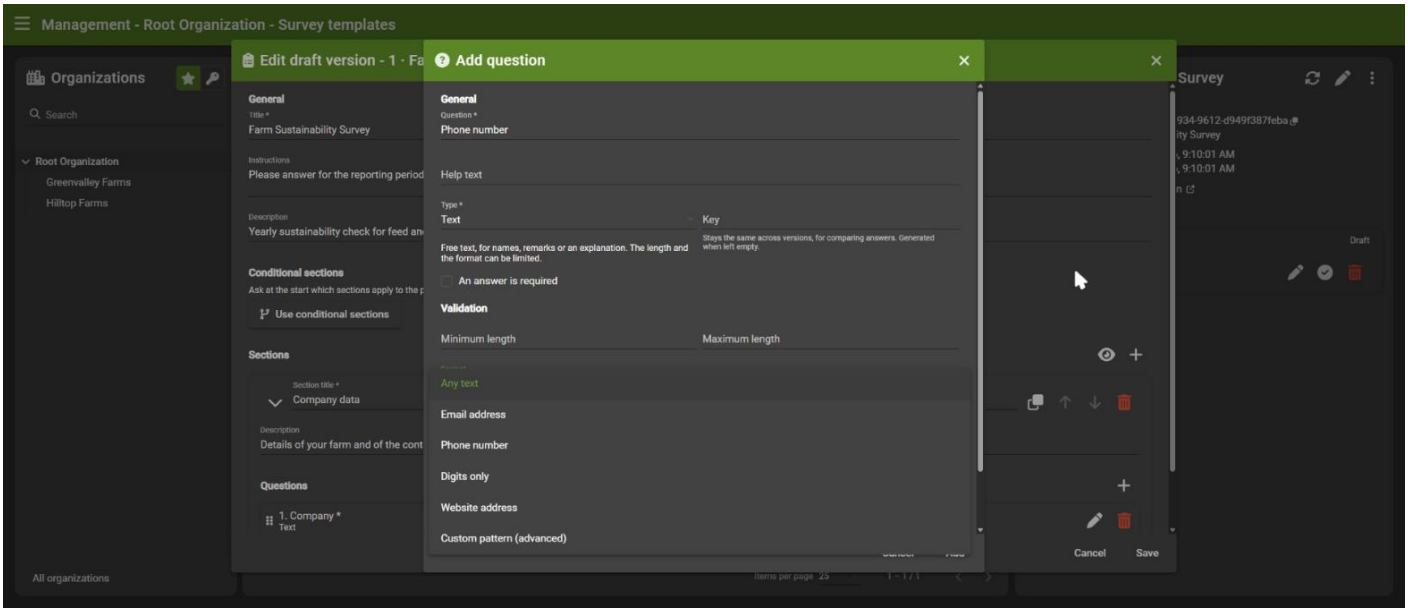
Clearing an answer. Optional yes/no, rating, single-choice and date answers have a small × to clear them again, so a choice is never "stuck".

2.7 Text formats

Text questions can be limited to a **format**, without knowing anything about regular expressions:

Format	Accepts
Any text	Everything
Email address	`name@company.com`
Phone number	Digits, spaces, brackets and dashes, optionally starting with `+`
Digits only	Only the digits 0 to 9

Format	Accepts
Website address	An address starting with `http://` or `https://`
Custom pattern (advanced)	Your own regular expression, for experts



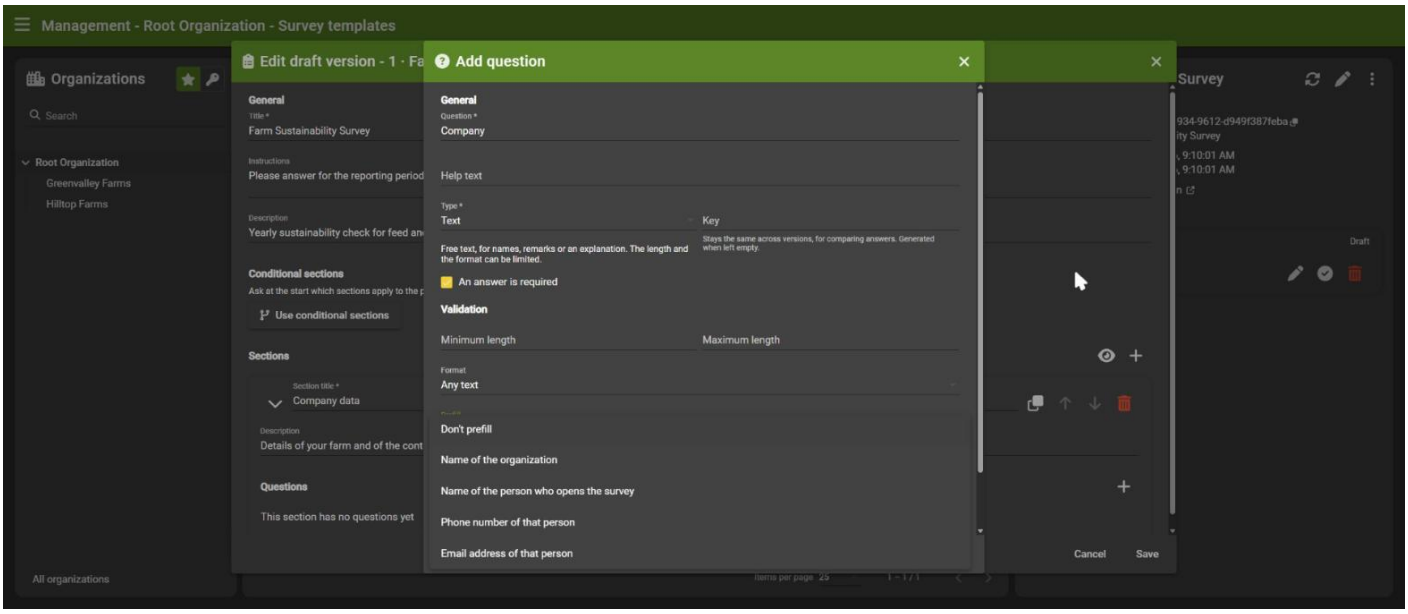
2.8 Prefill from the account

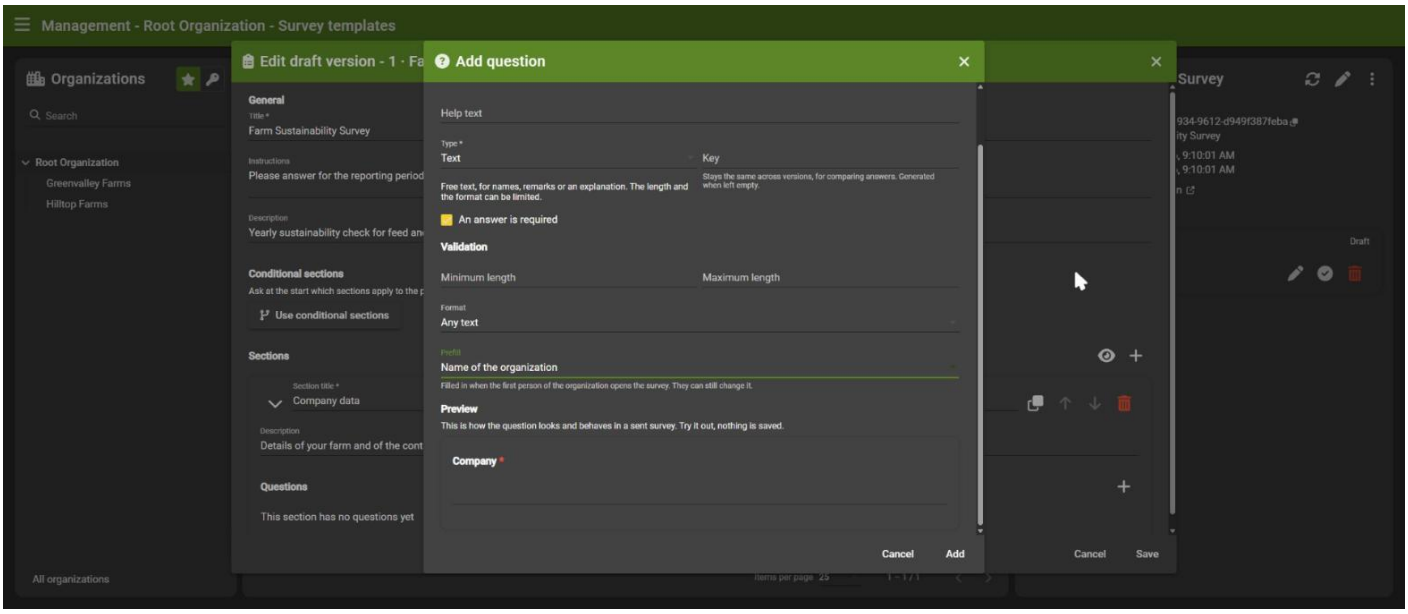
Text questions can be filled in automatically, so people do not have to type what we already know:

Prefill	Filled in with
Name of the organization	The organization the survey was sent to
Name of the person who opens the survey	First and last name
Phone number of that person	Phone number of the account
Email address of that person	Email address of the account

How it works:

- It happens **once**, when the **first person of the organization** (the responsible user or a user of that organization) opens the survey.
- The answers are marked **From account** and can **always be changed**. Every change is kept in the history.
- If a detail is unknown (for example no phone number), or does not fit the question's format, the question stays empty.
- Prefilled answers never overwrite an answer that is already there.

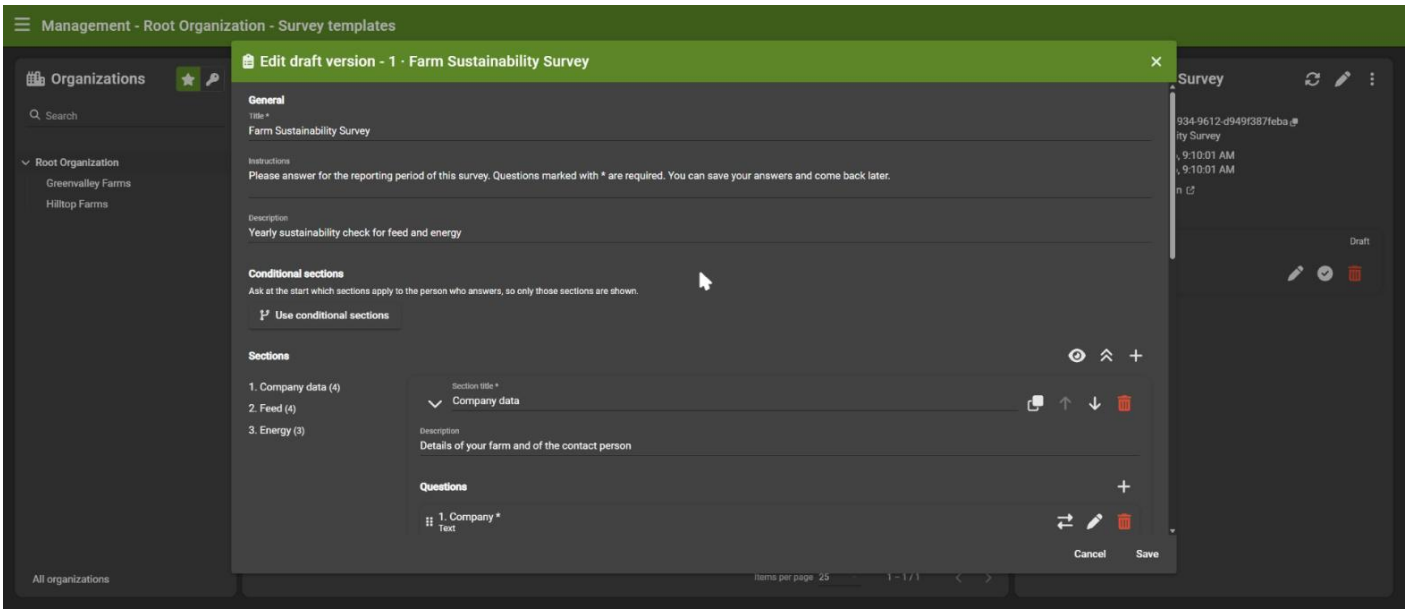


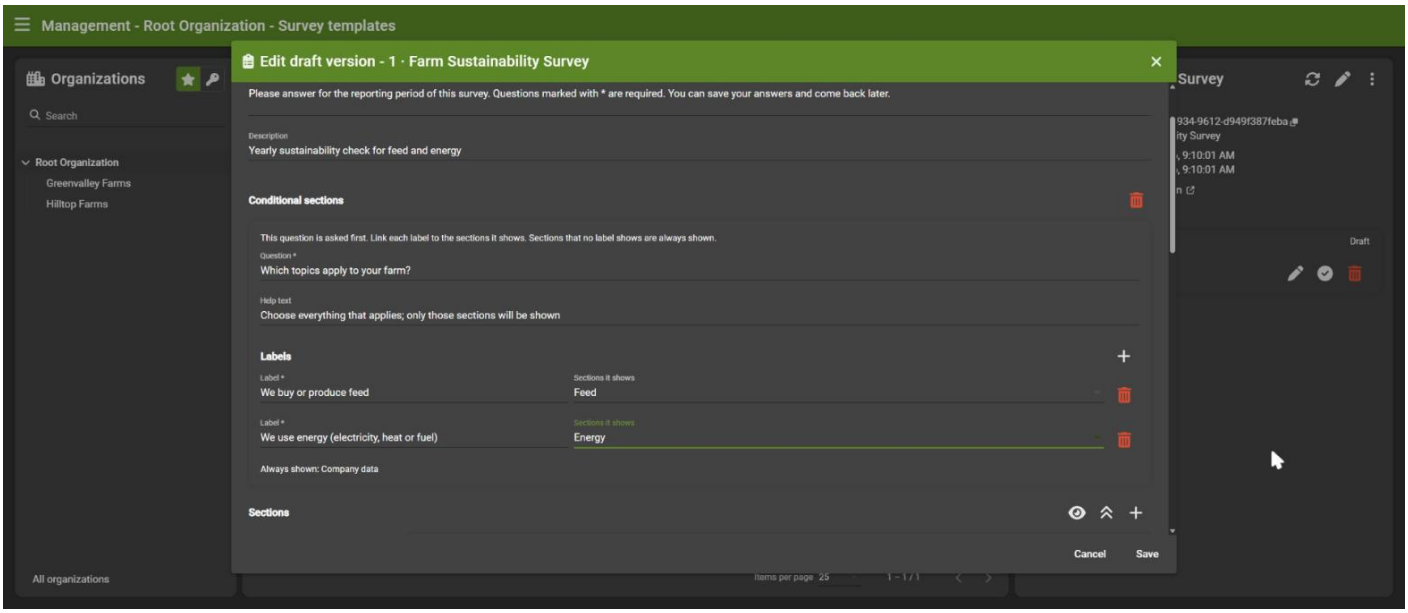


2.9 Conditional sections: show only what applies

Not every organization needs every section. With **conditional sections** you ask a question at the start of the survey, and only the sections that apply are shown.

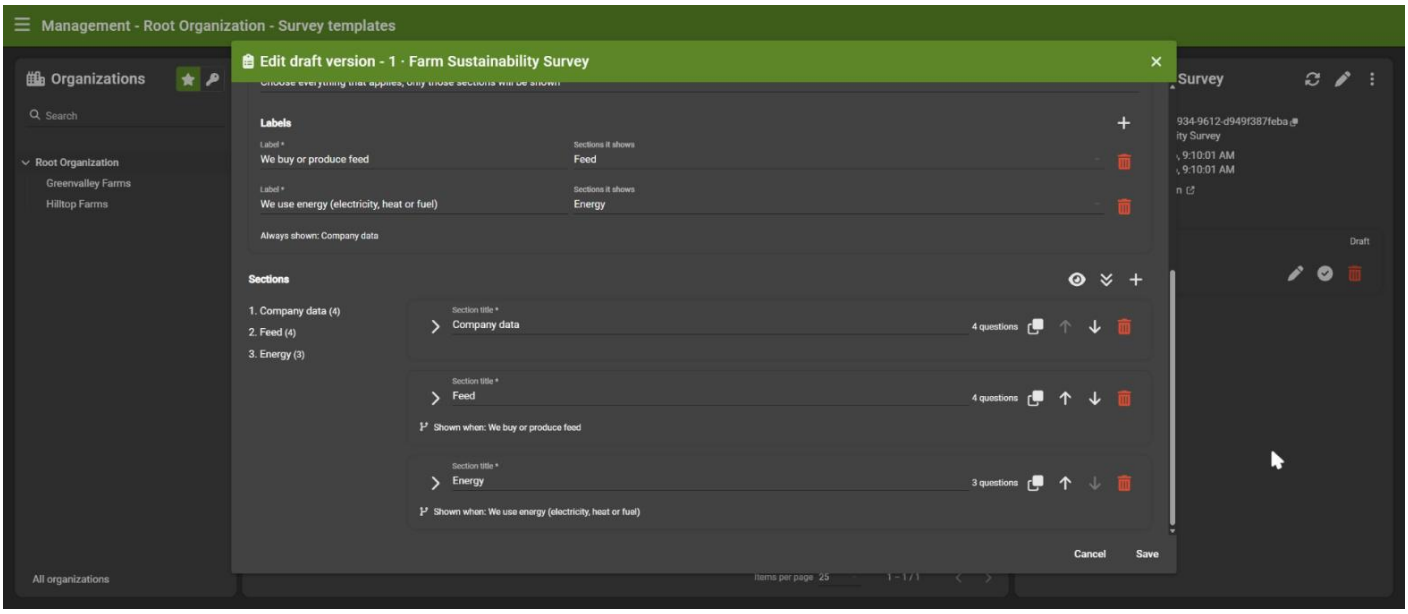
1. In the editor, click **Use conditional sections**.
2. Write the question (for example *Which topics apply to your farm?*).
3. Add a **label** for every answer option, and choose **which sections that label shows**.





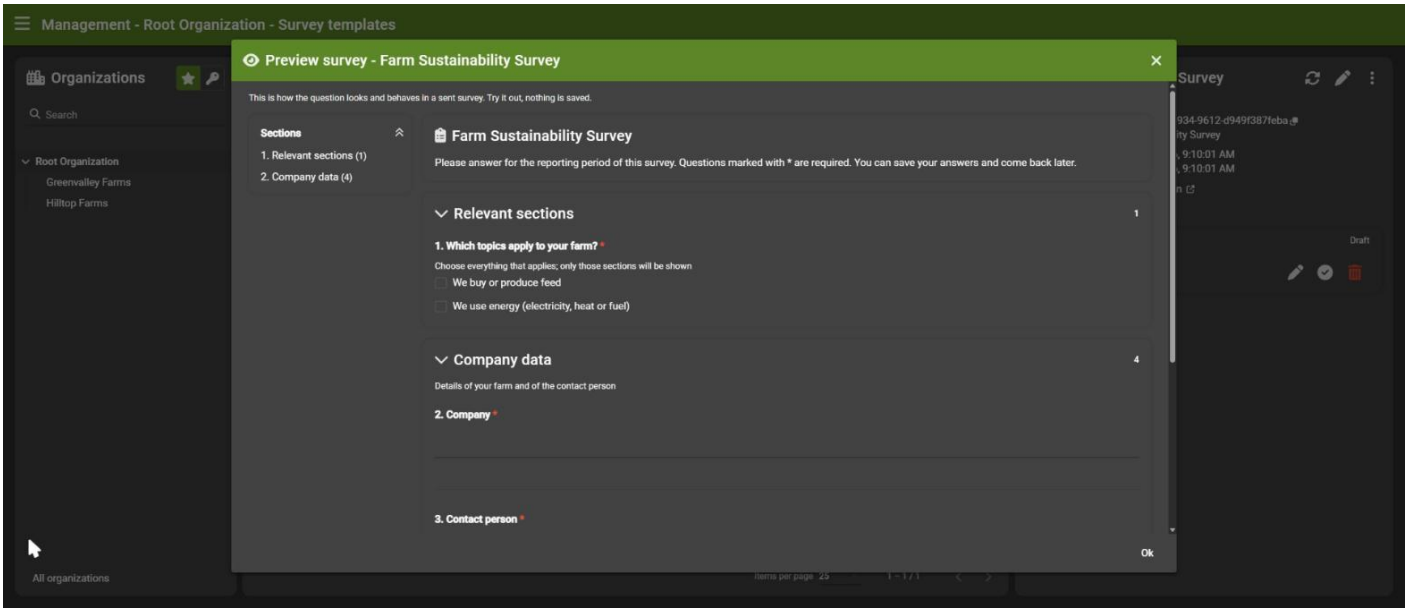
Good to know:

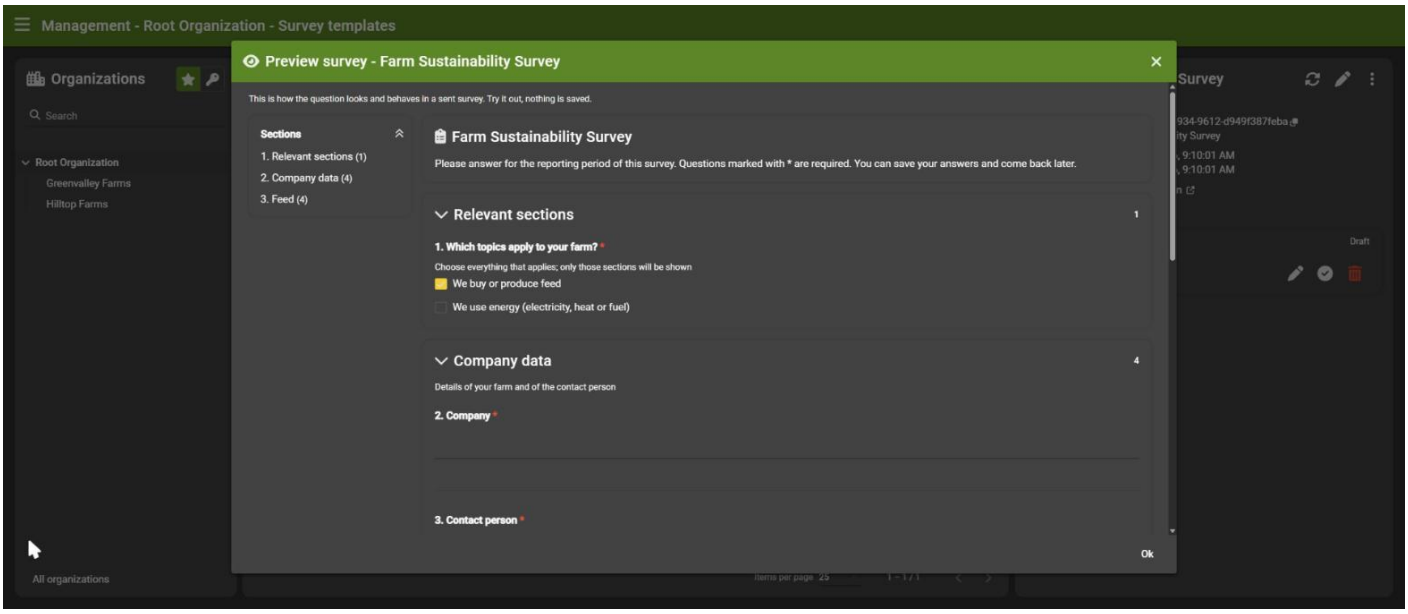
- Several sections can be linked to the same label, and a section can be linked to several labels. It is shown when **any** of its labels is chosen.
- Sections that are not linked to any label are **always shown** (for example *Company data*). The editor lists them.
- Every linked section shows **Shown when: …** in the editor.
- The question is **required** and is asked **first**.
- Sections that are not shown **do not need to be answered**. Answers already given in a section that is hidden later are **kept**, but are ignored when submitting and in the export.



2.10 Preview the whole survey

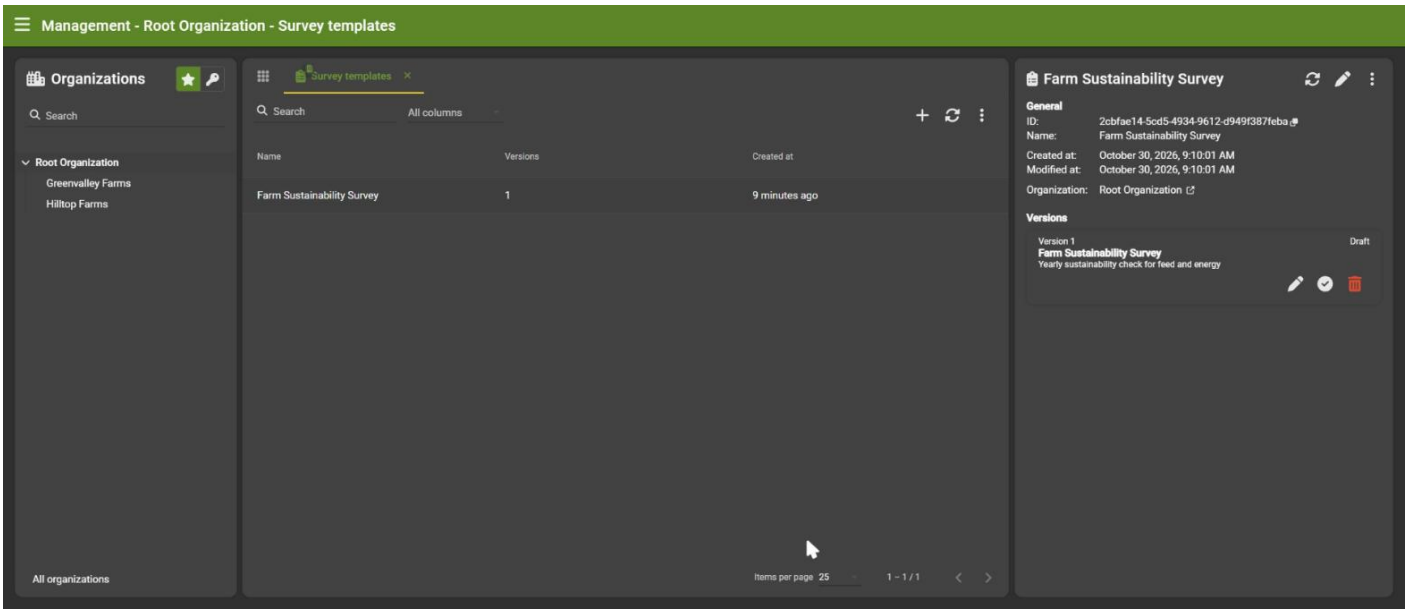
The **eye icon** next to *Sections* shows your draft as a real survey, with the same navigation, collapsing and input fields. You can fill it in to try it out, and conditional sections react to your answers. Nothing is saved.



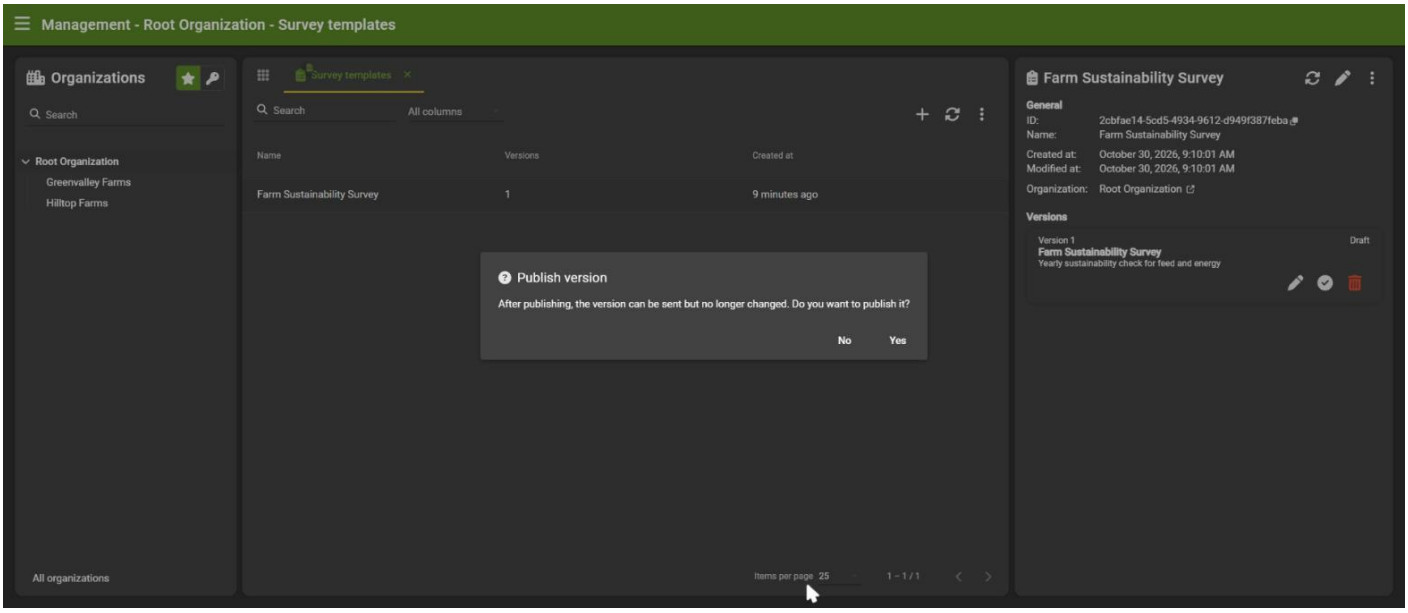


2.11 Save and publish

Click **Save** to keep your changes. The draft is listed with its status.



When the version is ready, click the ✓ icon to **publish** it. The service checks that every question is valid, that every section has at least one question and that conditional sections work.



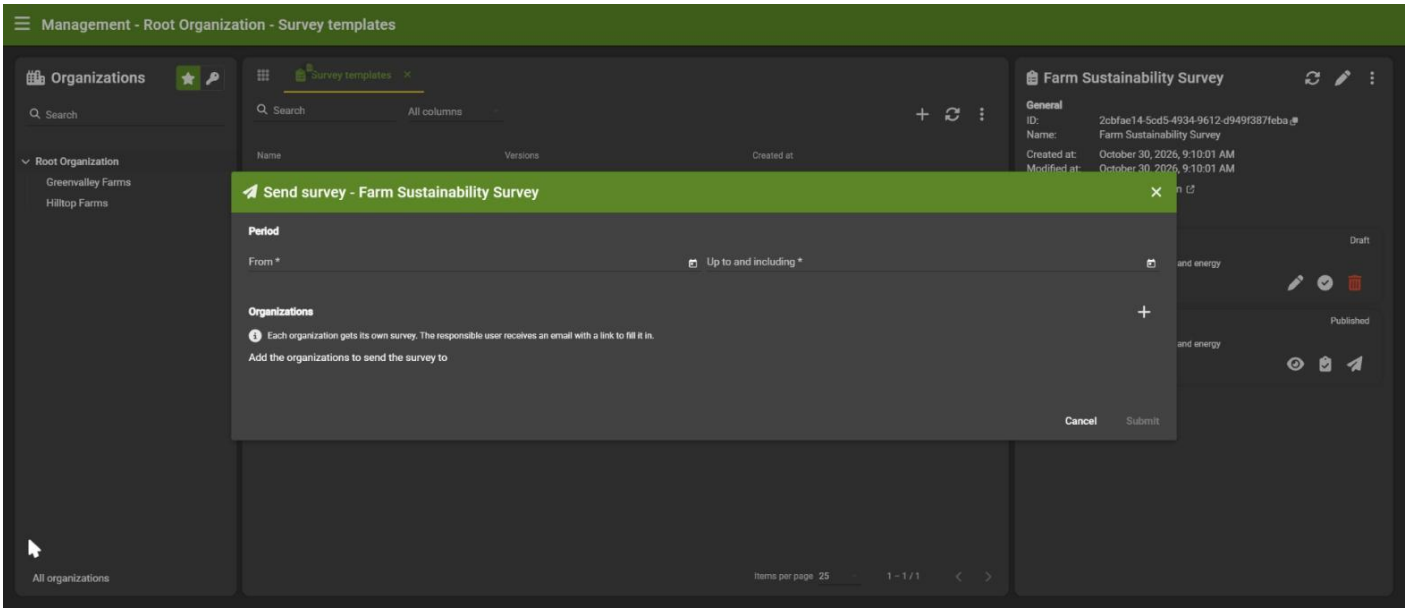
After publishing, the version can be **sent** but no longer changed.

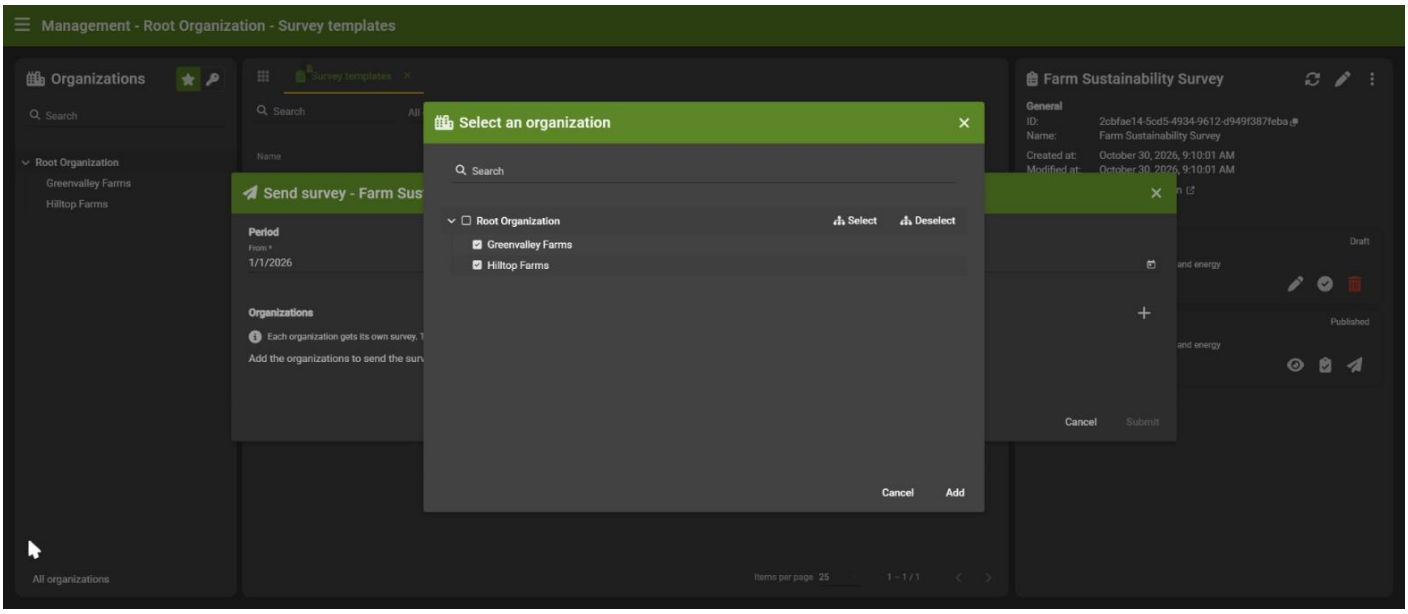
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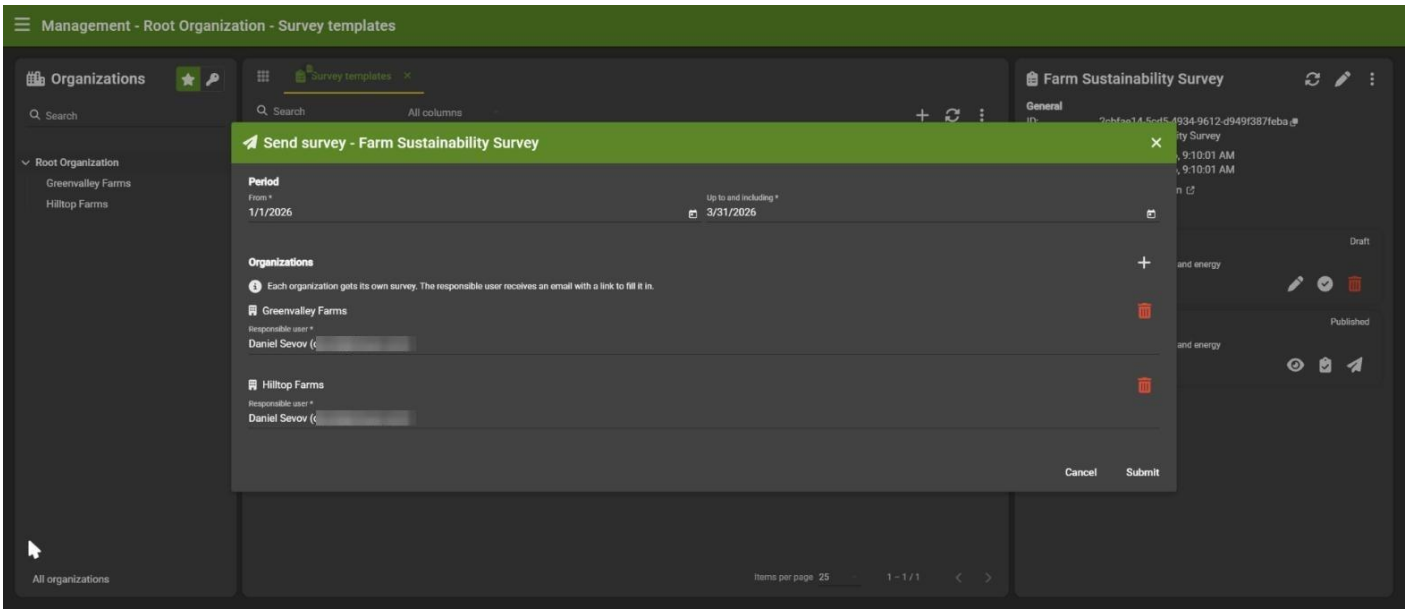
3. Send a survey

Click the **send** icon (paper plane) of a published version.

1. Choose the **period** the survey is about (*From* and *Up to and including*).
2. Click **+** to select the **organizations** that must receive the survey.
3. For each organization, choose the **responsible user**: the person who gets the invitation and fills in the survey. Only users with write access (or more) and the surveys feature are listed.
4. Click **Submit**.

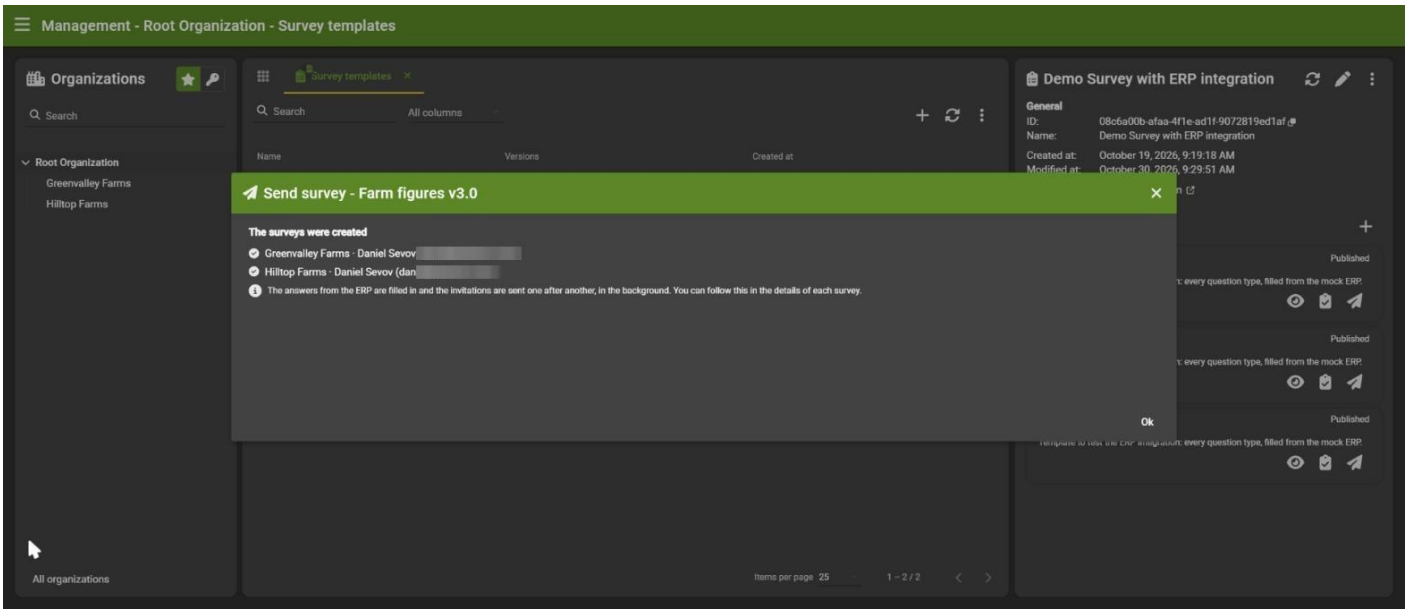






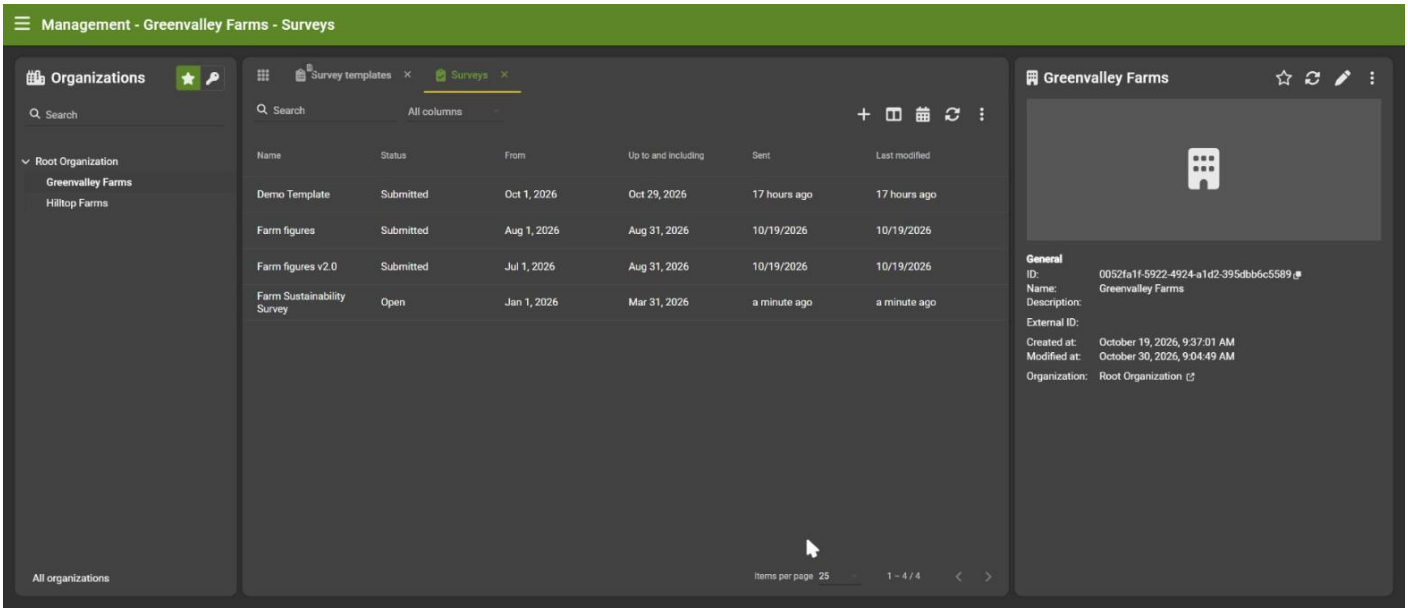
Every organization gets **its own survey**. The responsible user receives an **email with a link** to the survey. If an invitation did not arrive, you can send it again (see 4).

The surveys are created right away; everything that follows (ERP figures, invitation email) runs in the background, one survey after another.

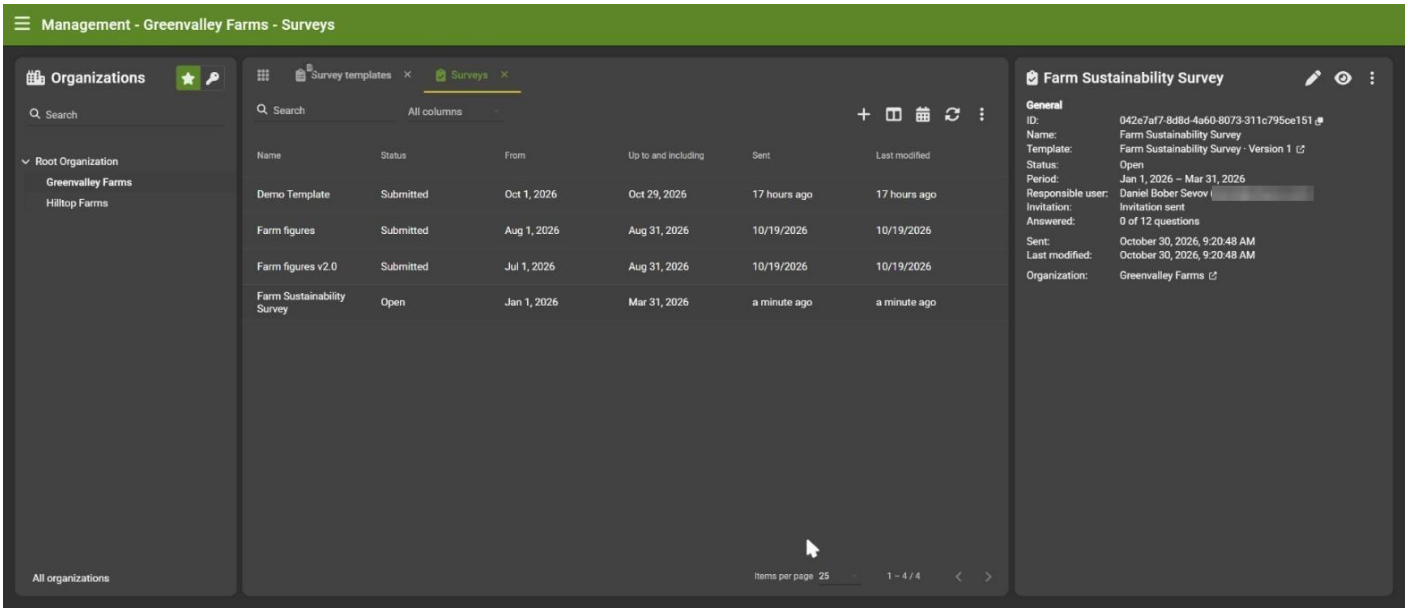


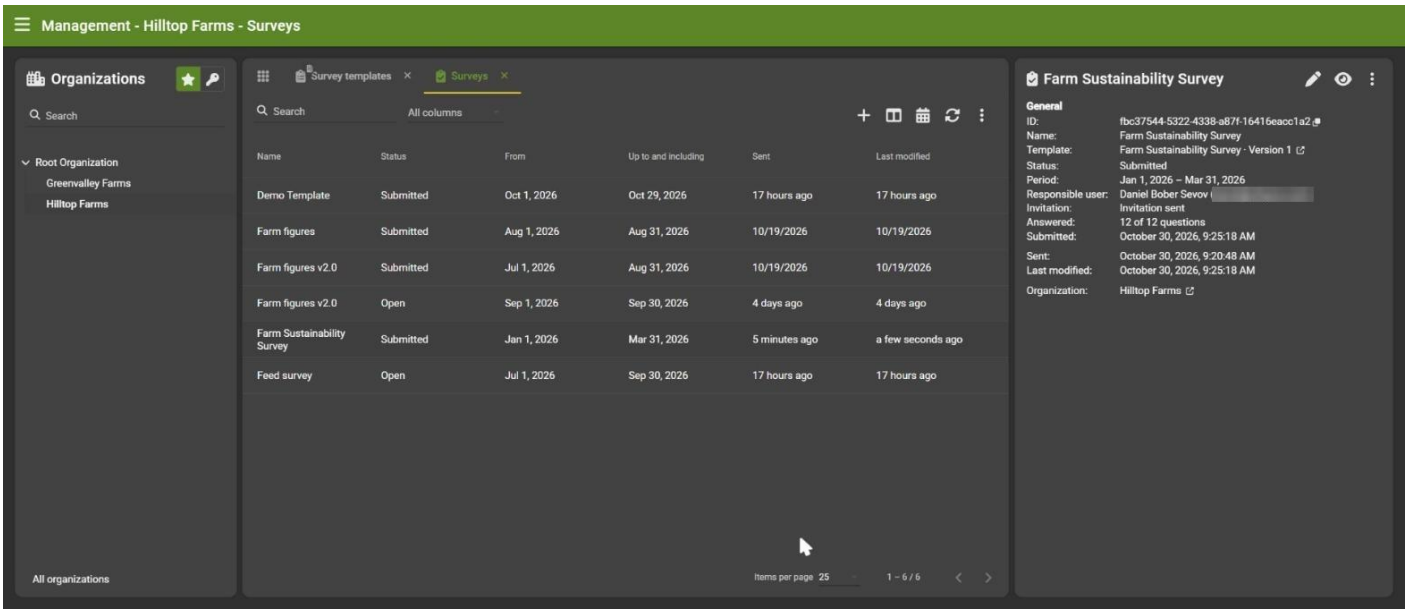
4. Follow the surveys

Open **Surveys** and select an organization to see its surveys. The list shows the status (**Open** or **Submitted**), the period and when it was sent.



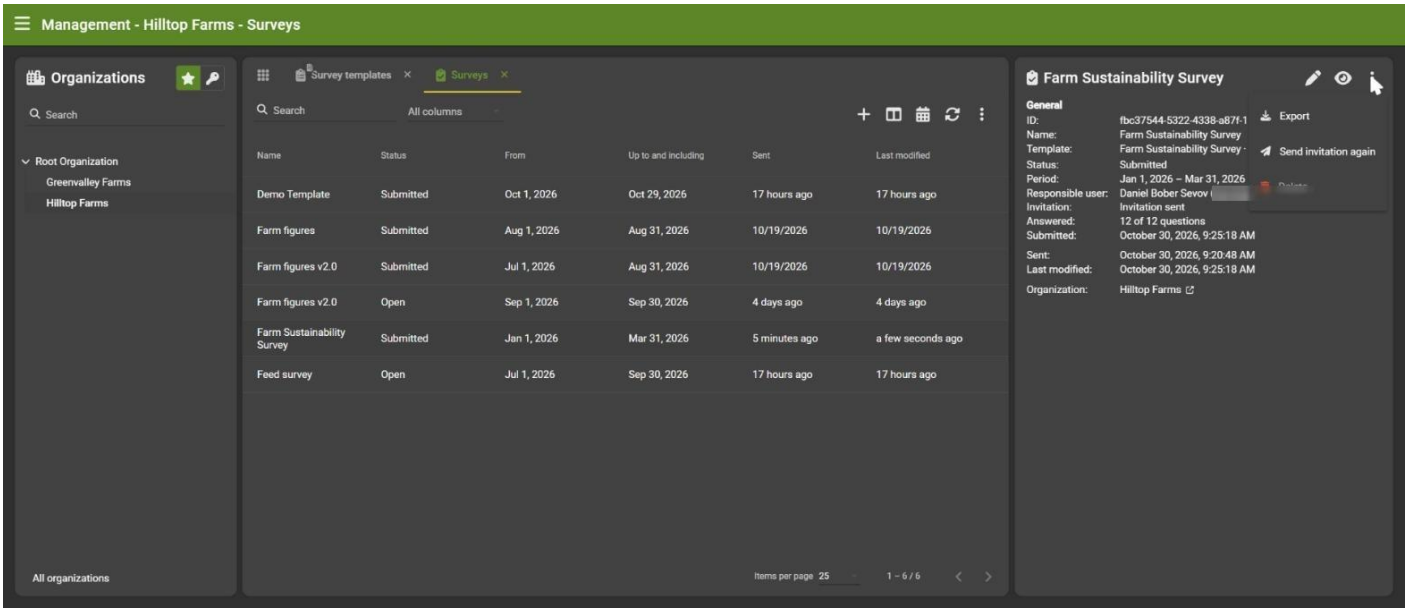
Select a survey for its details: template and version, period, responsible user, whether the invitation was sent, and how many questions have been answered.





The eye icon opens the survey **read-only**. The menu (⋮) offers:

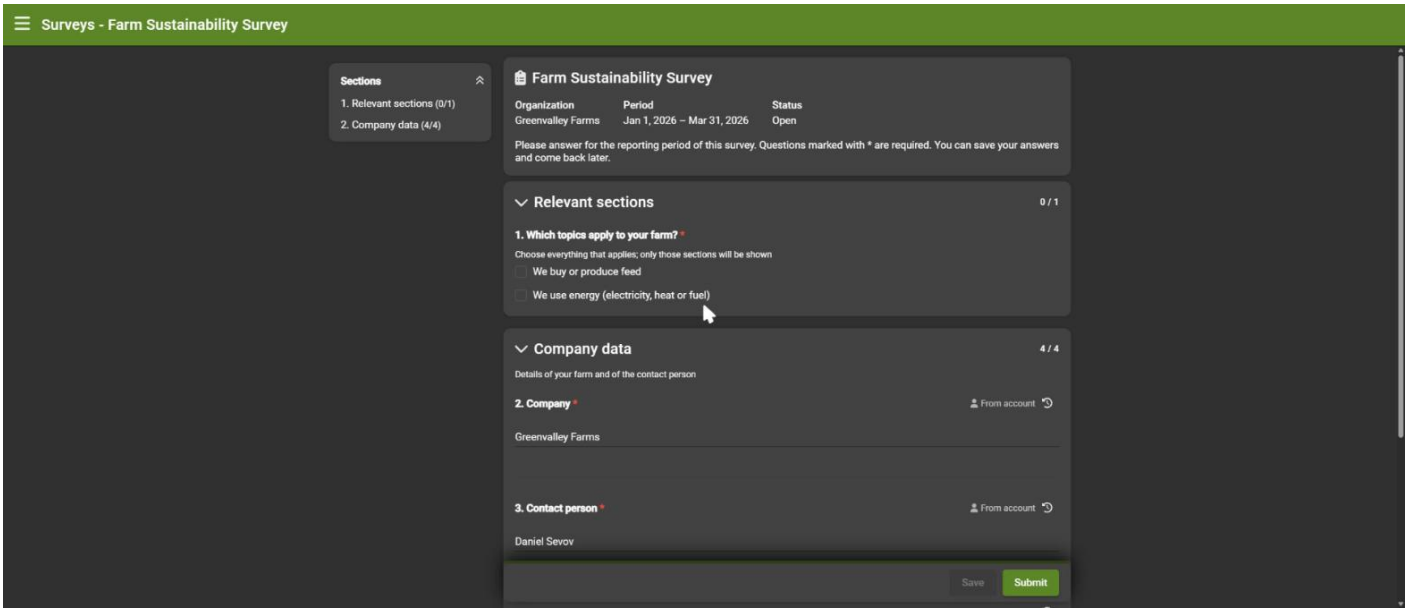
Action	
Export	Download the answers (see 6)
Send invitation again	Mail the link to the responsible user again
Delete	Only possible while the survey is not submitted

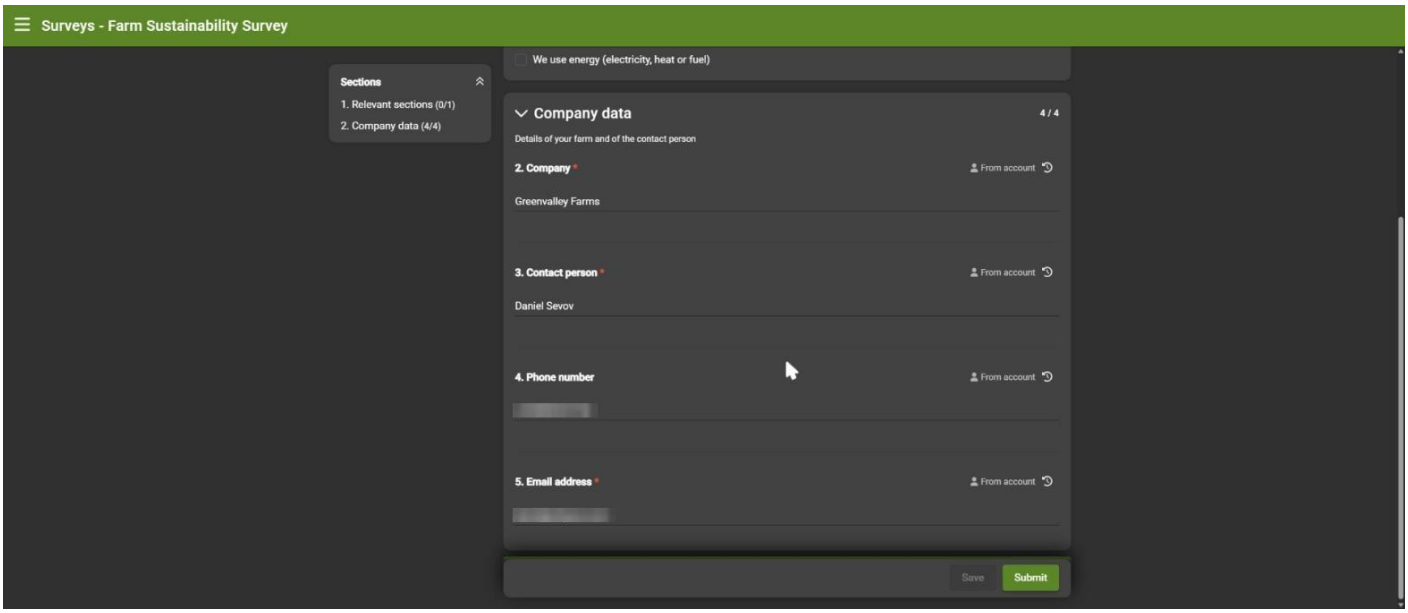


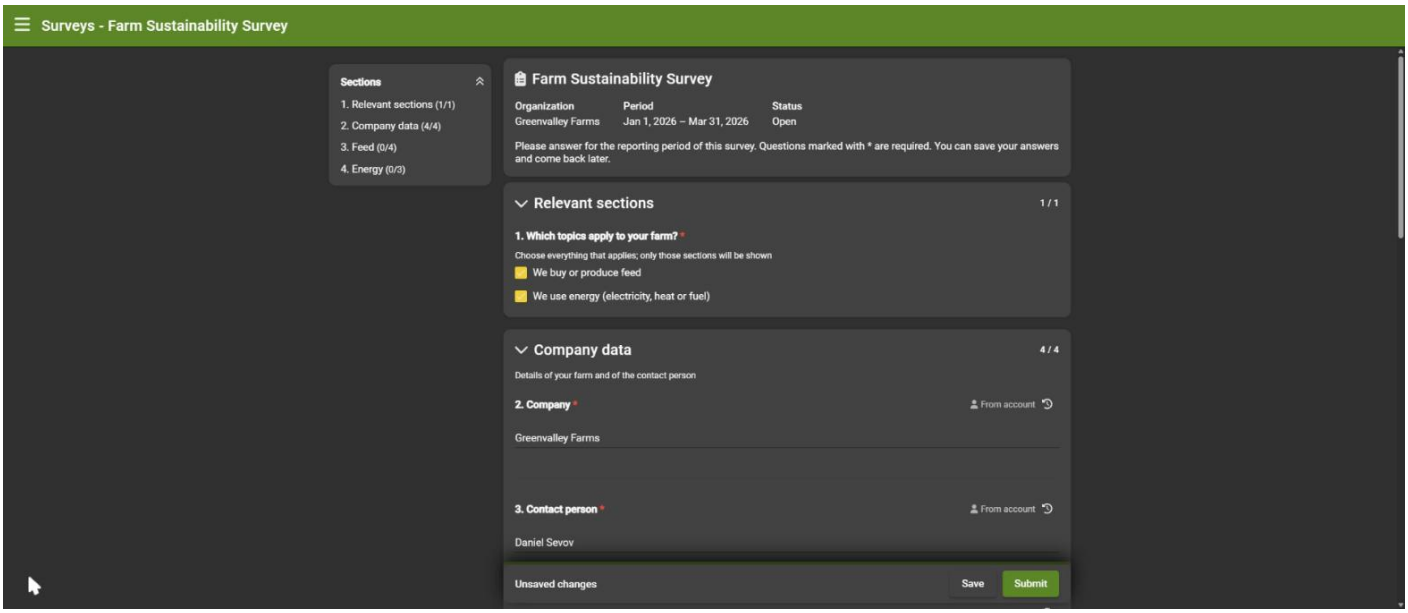
5. Fill in a survey

The responsible user opens the survey from the email.

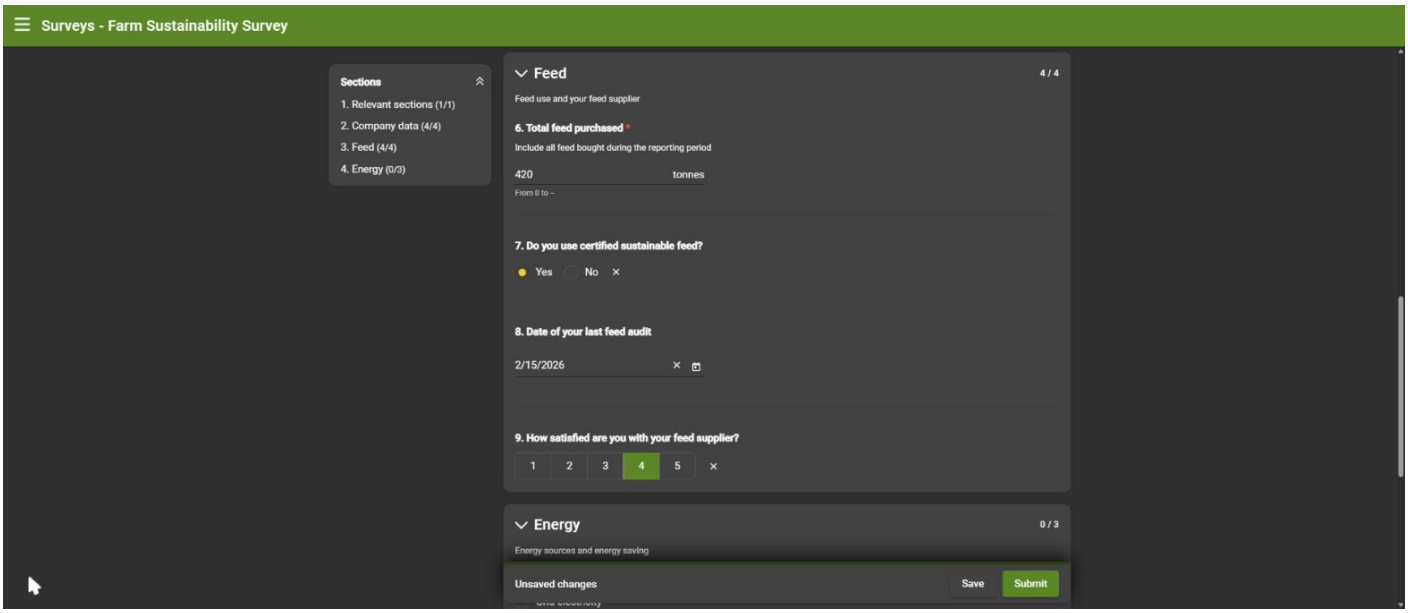
- The **navigation** lists the sections with their progress (for example *Feed (3/4)*). Sections can be collapsed.
- Required questions are marked with *.
- Prefilled answers are marked **From account**.
- With conditional sections, the sections that apply appear as soon as the choice is made.

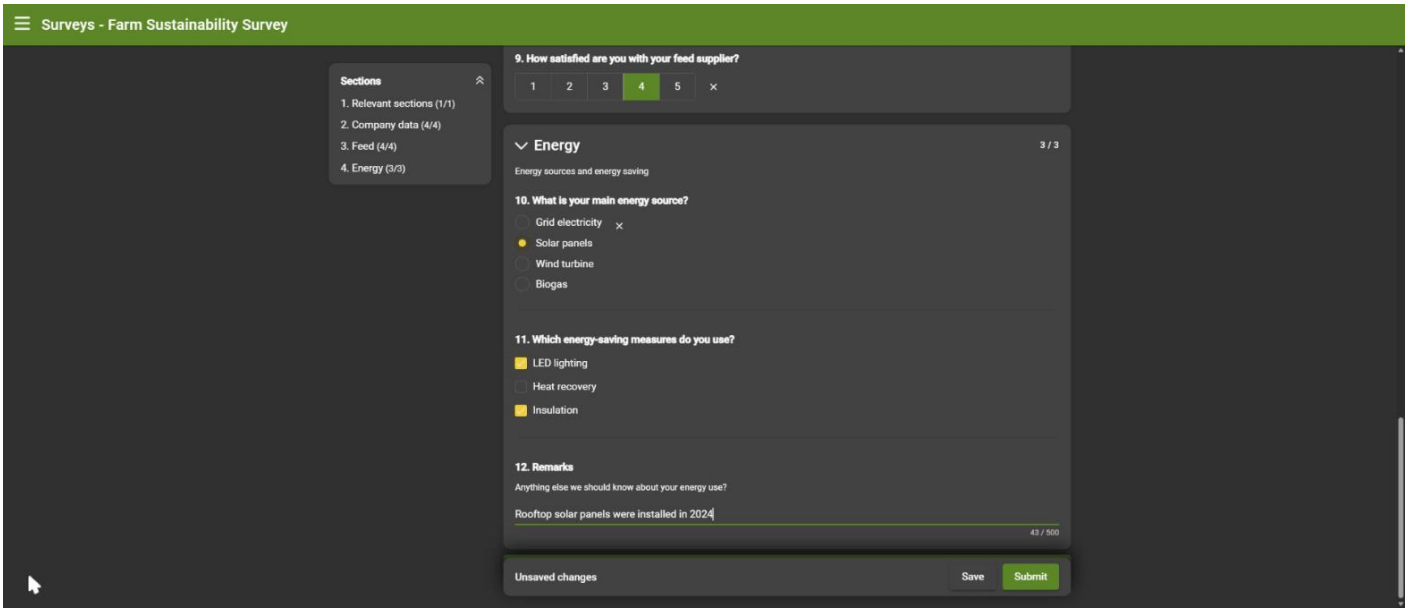




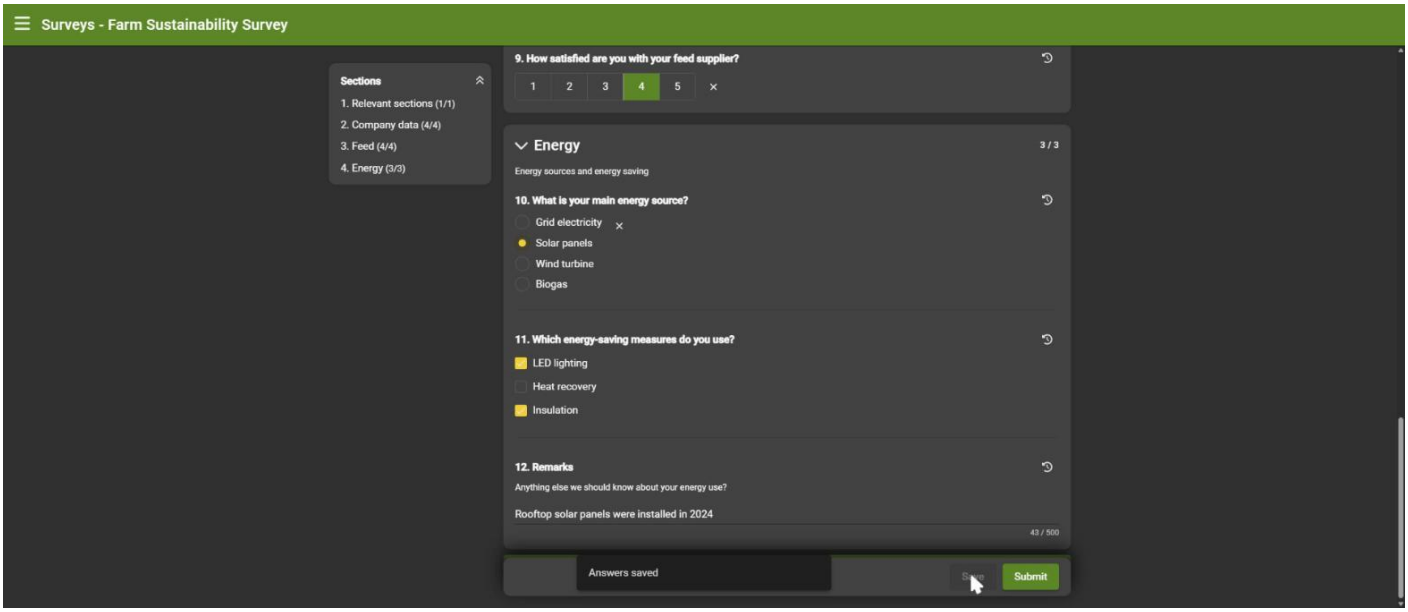


Answer the questions. Each type behaves as in the preview, including the × to clear an answer.

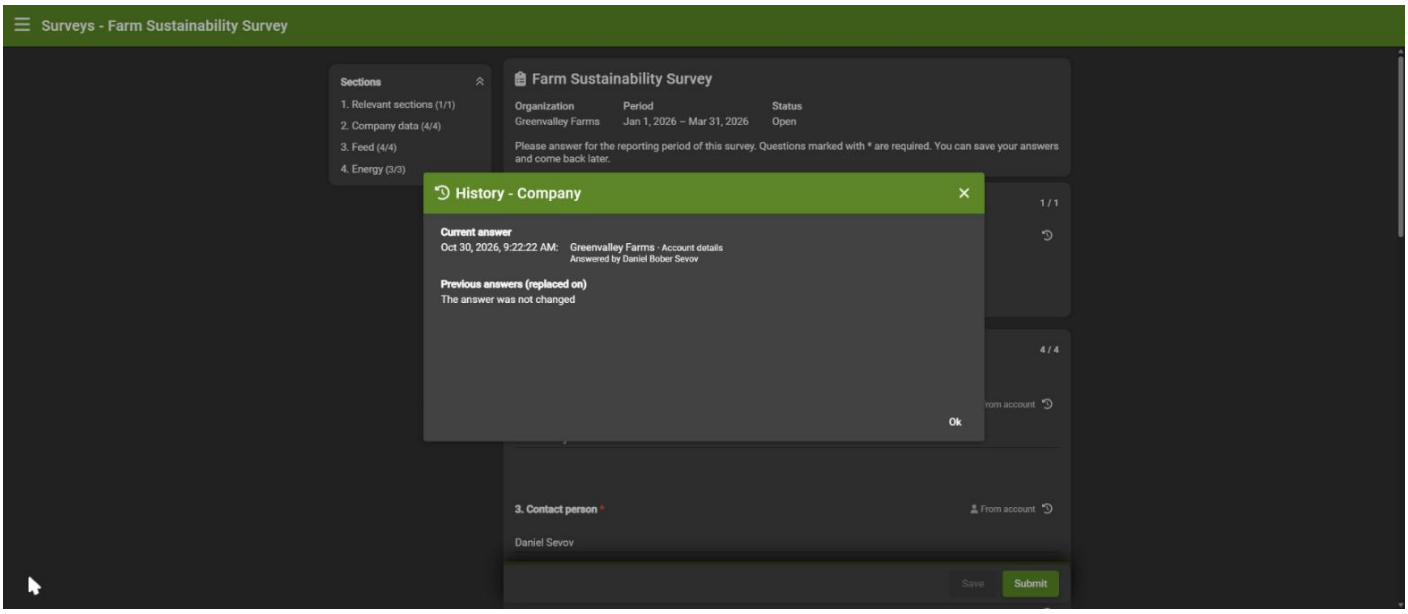




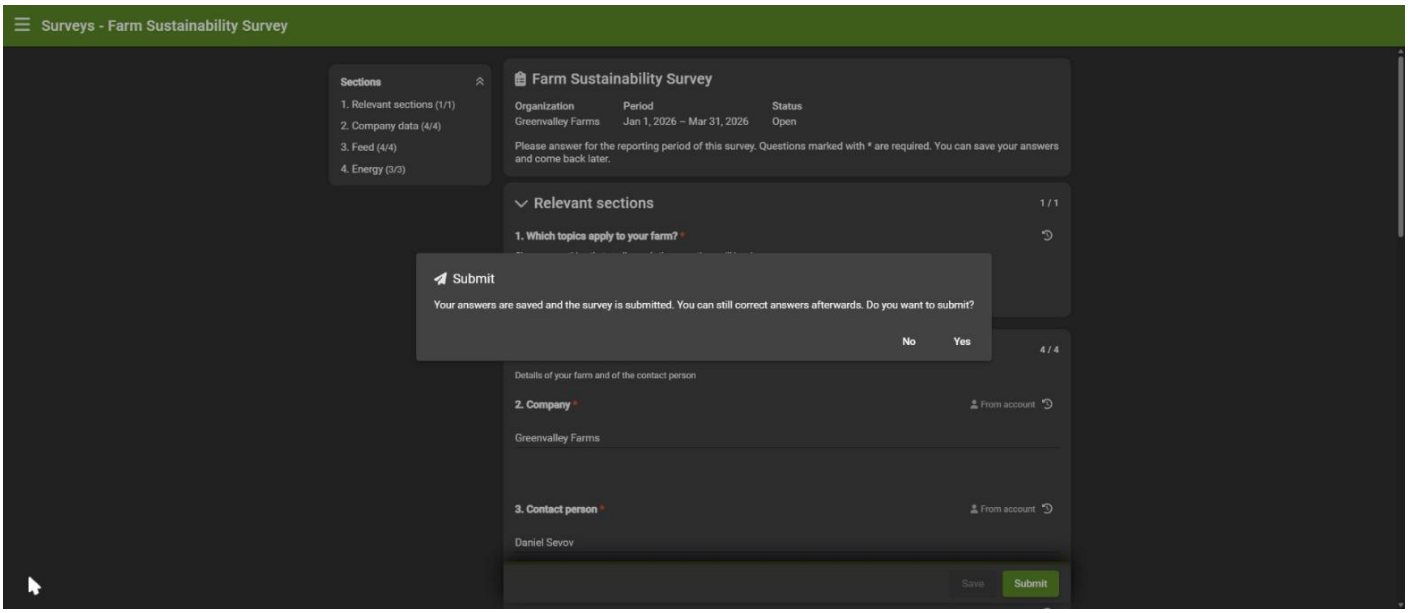
Save at any time and come back later: answers are only stored when you save, and the bar at the bottom tells you when there are unsaved changes.

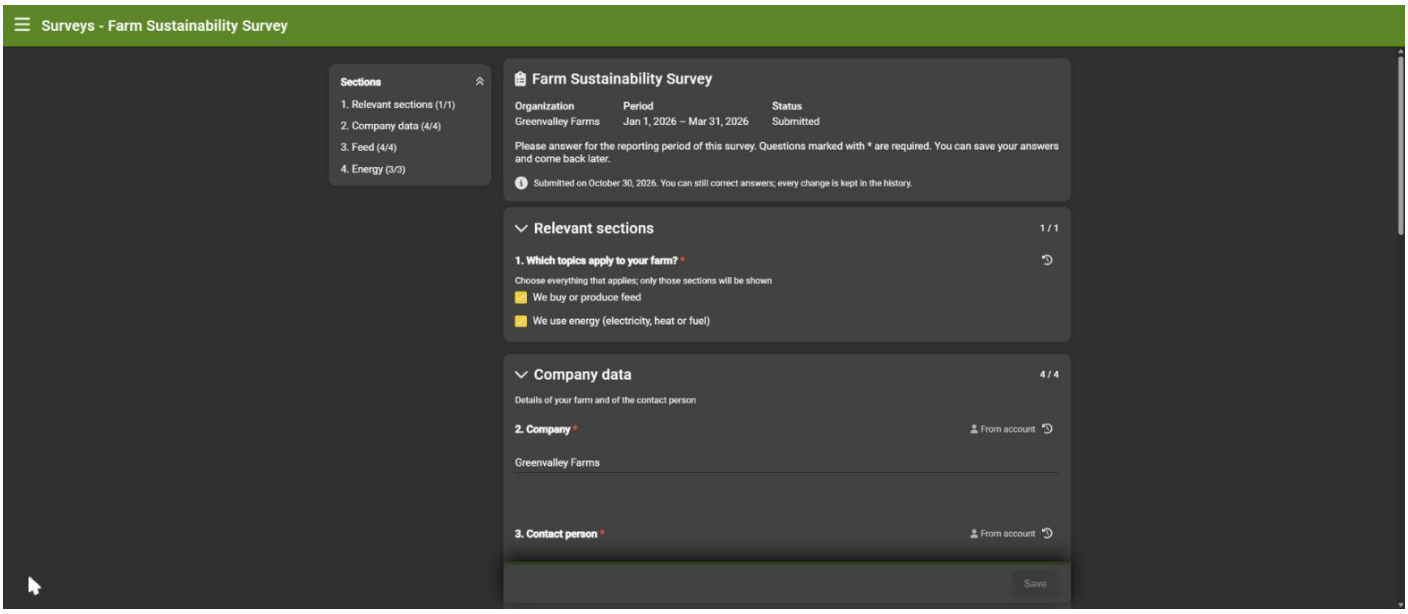


The **history** icon next to an answer shows where it came from (typed in, or from the account) and every previous value, with who changed it and when.



When everything is filled in, click **Submit**. Missing or invalid required answers are shown at their question.





A submitted survey can **still be corrected**. Every change is kept in the history, and required answers cannot be emptied.

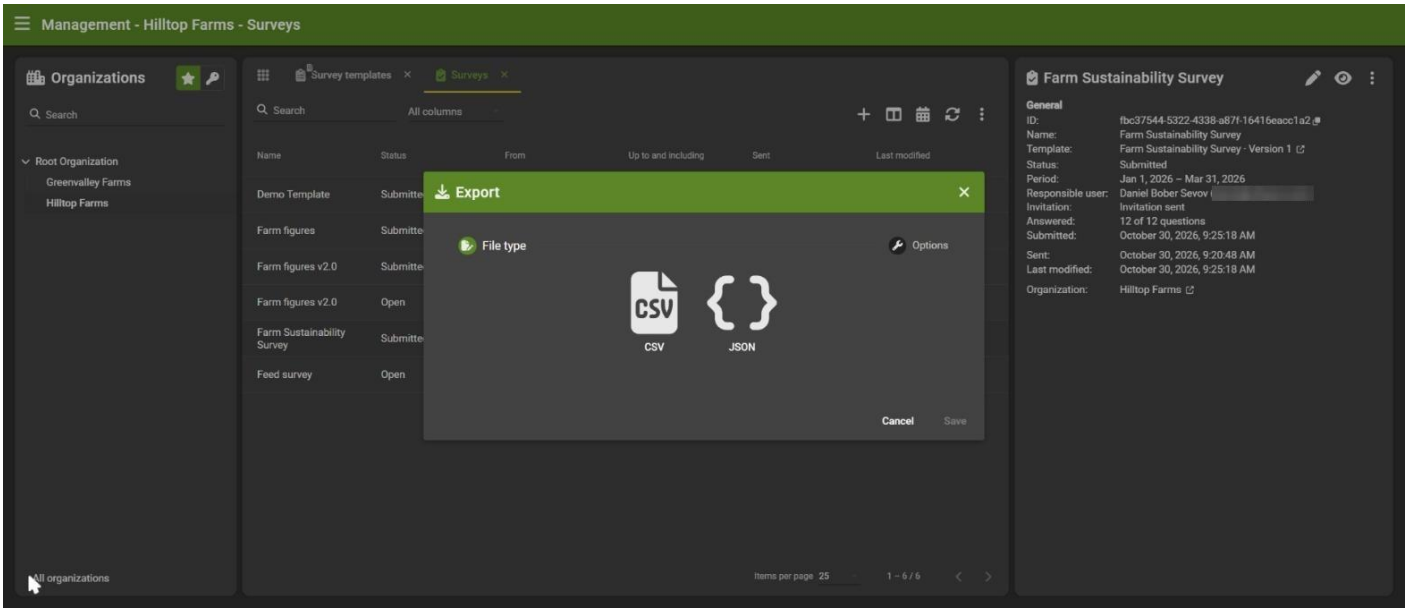
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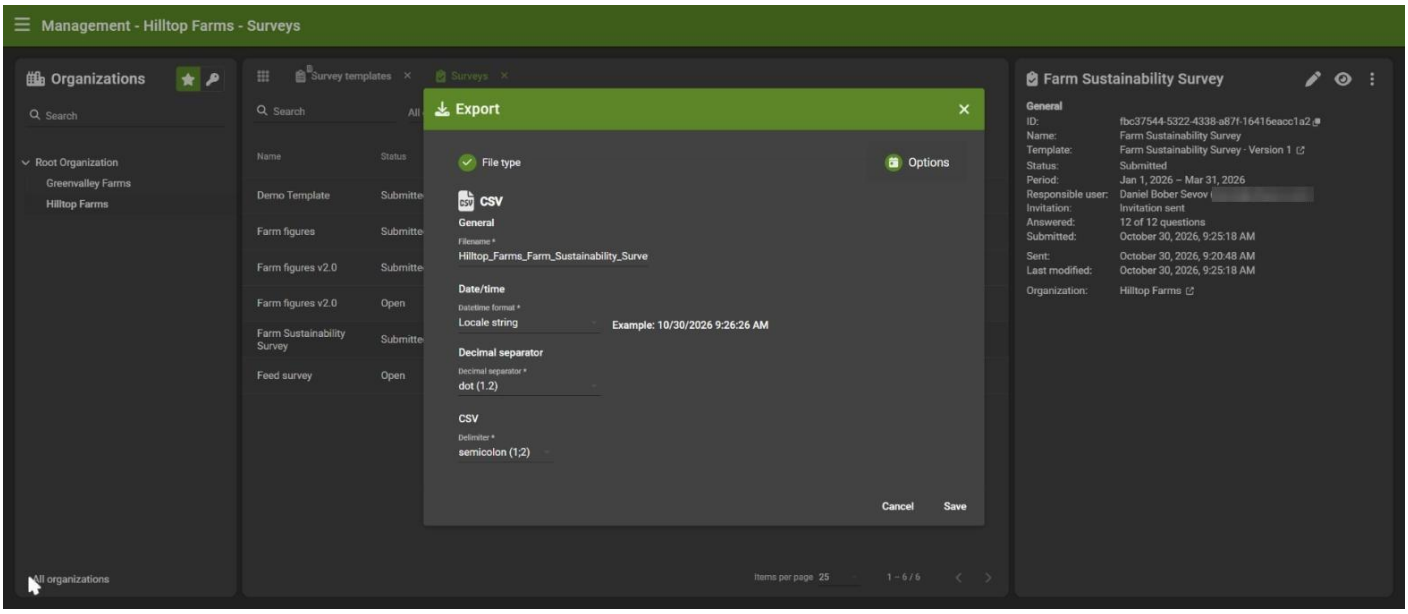
6. Export the answers

Choose **Export** in the menu of a survey, then a **file type**:

- **CSV**: one row per question (section, number, key, question, type, unit, required, answer, value, source and time of the answer), ready for Excel. You can set the file name, date format, decimal separator and delimiter.
- **JSON**: the same information, structured per section.

Sections that were not shown are not included.

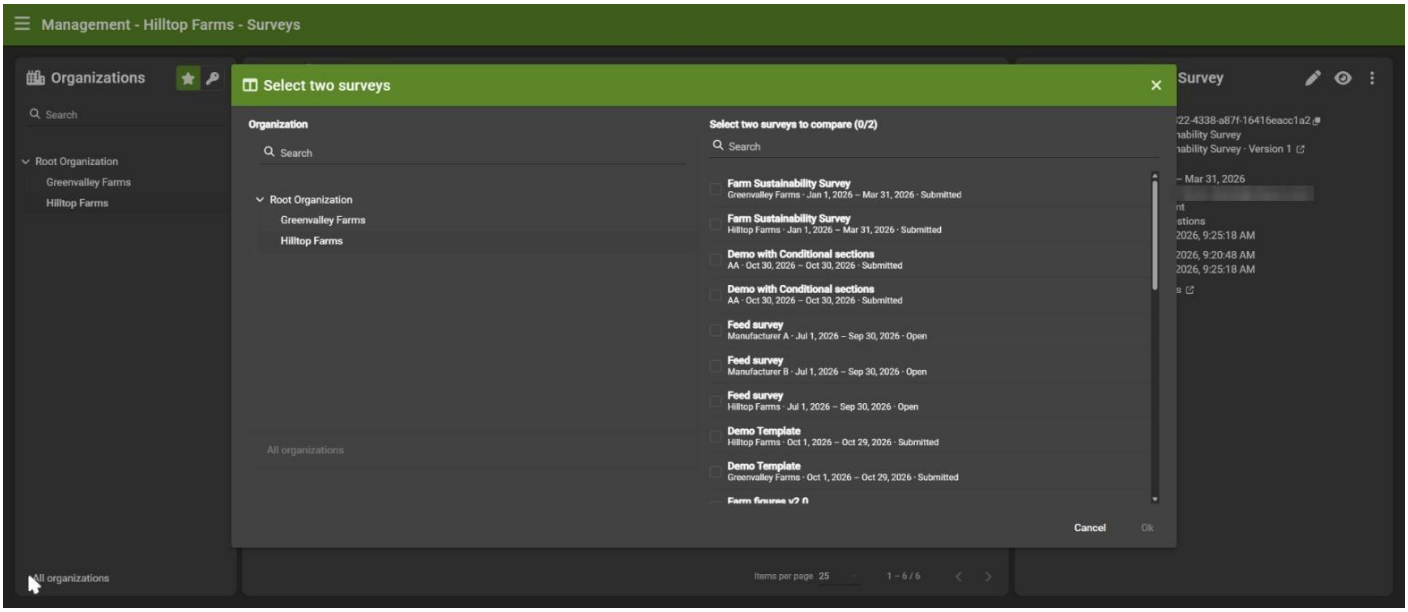


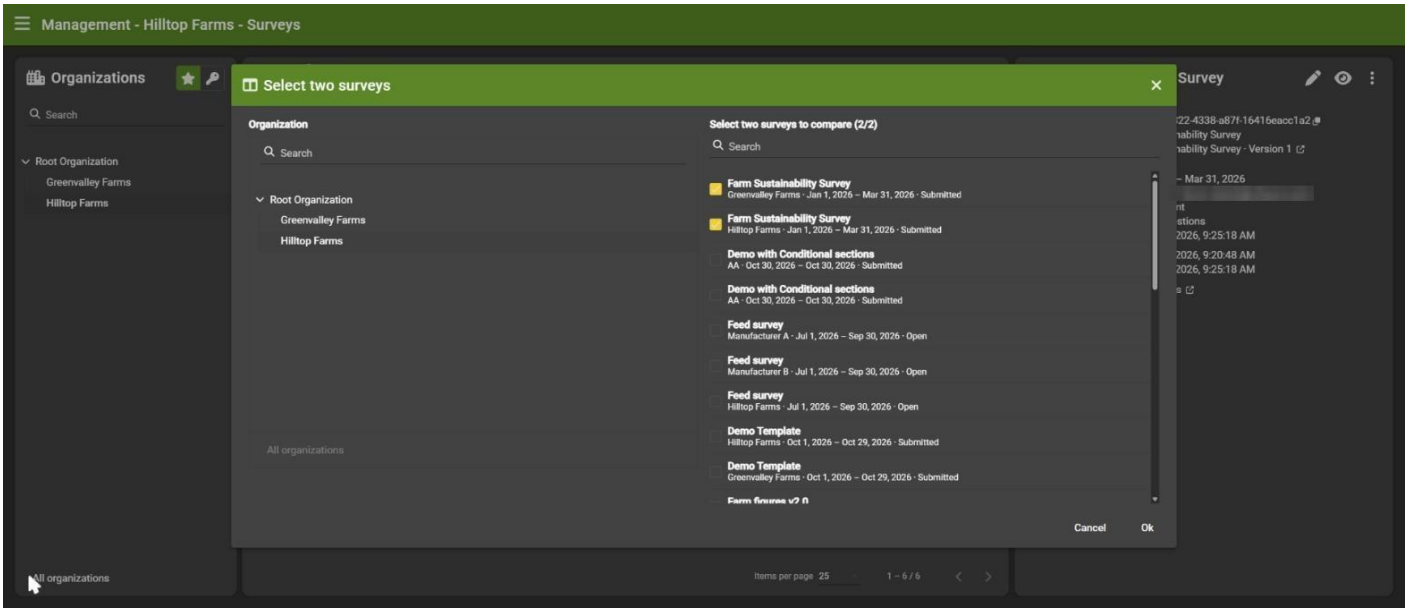


7. Compare surveys

Compare two surveys, for example two organizations in the same period, or the same organization in two periods.

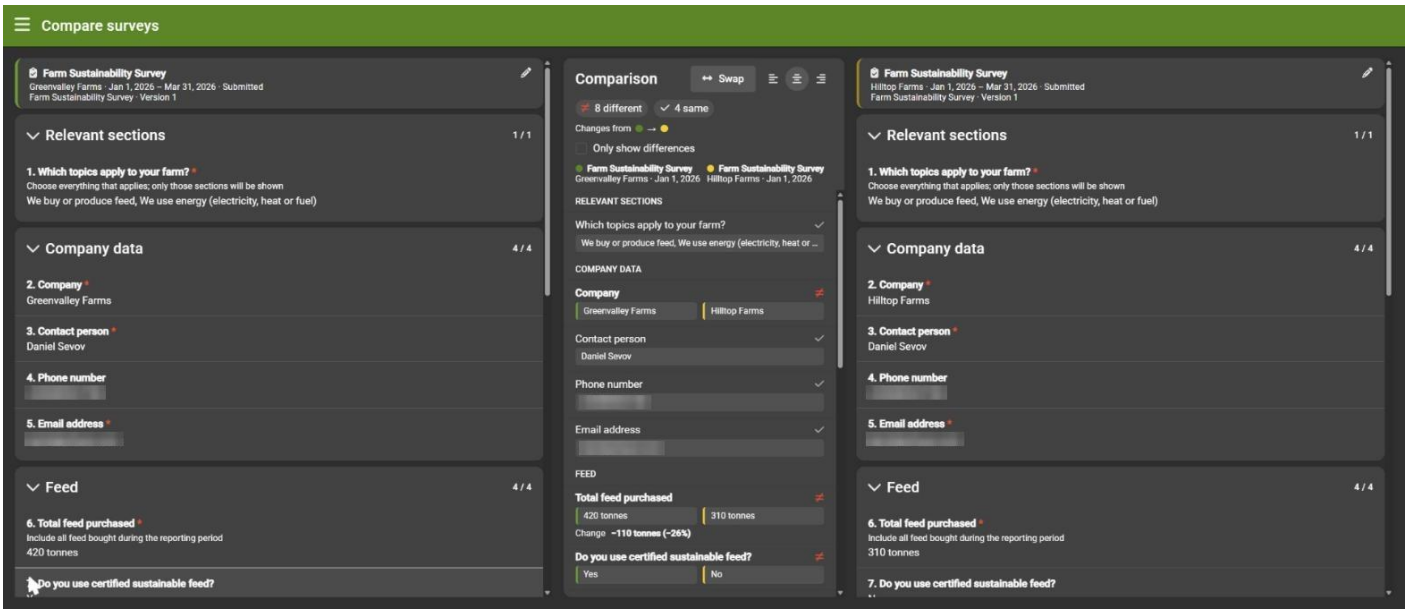
1. Open the surveys table and click the **compare** icon (or select two surveys from a version, see below).
2. Select **two surveys** and click **Ok**.

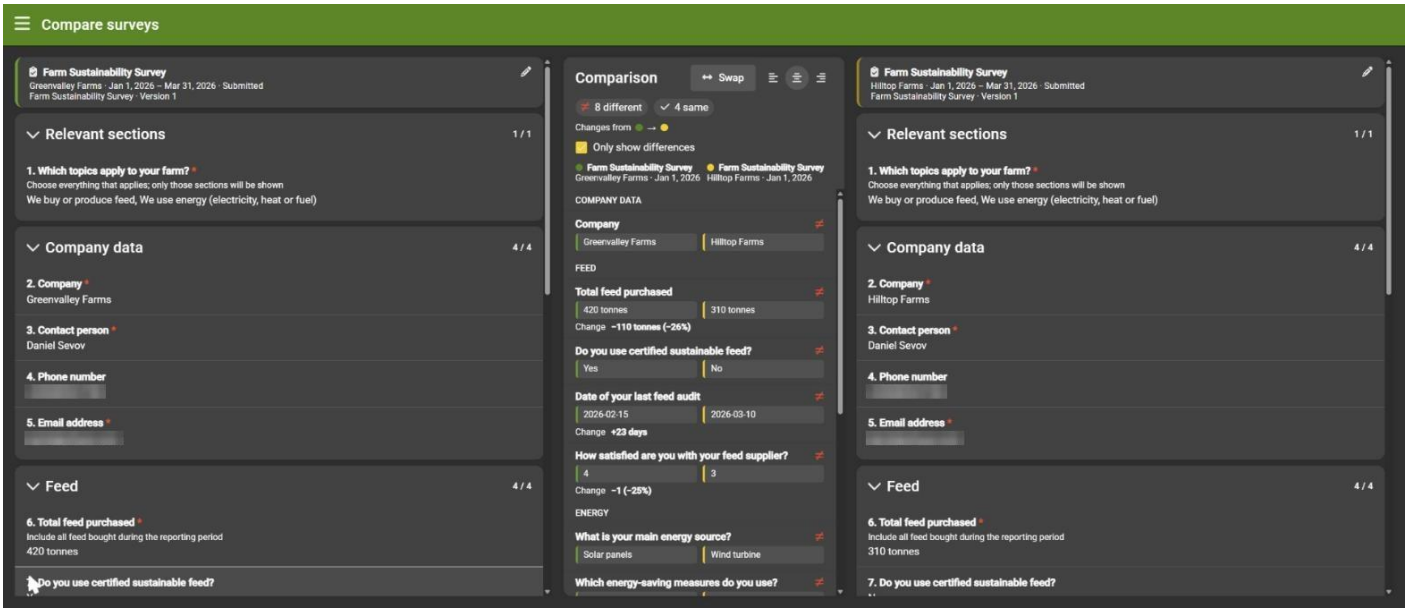


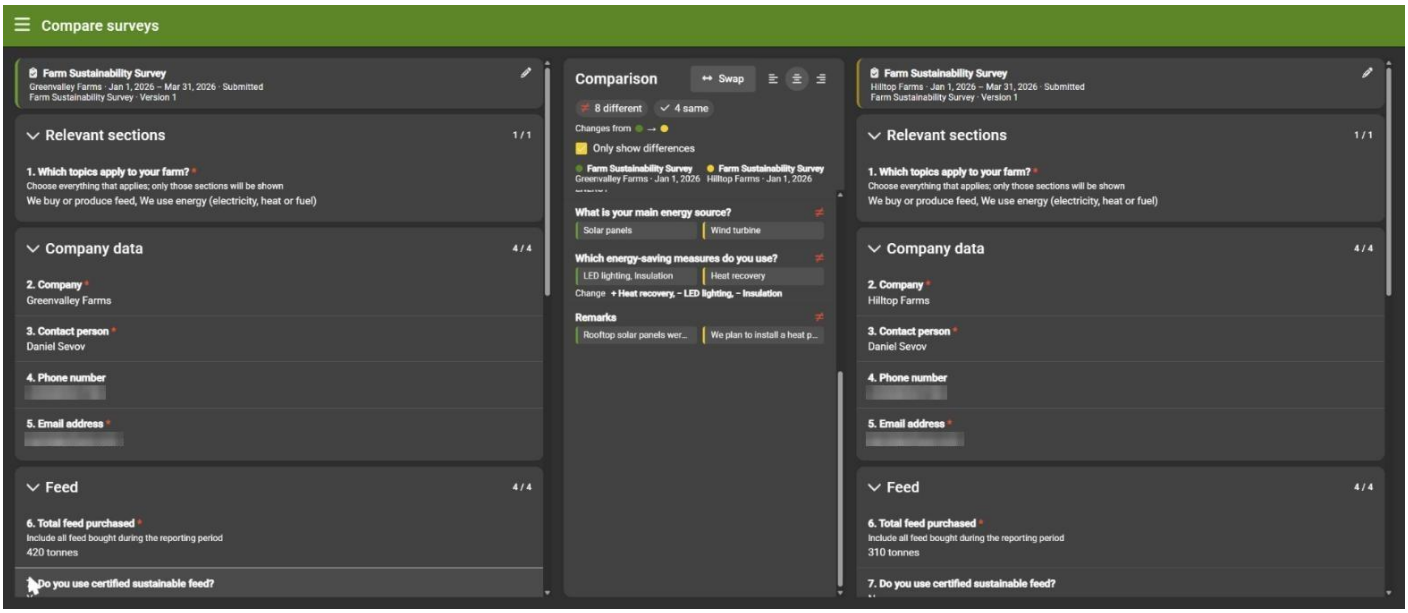


The comparison shows both surveys side by side, and in the middle:

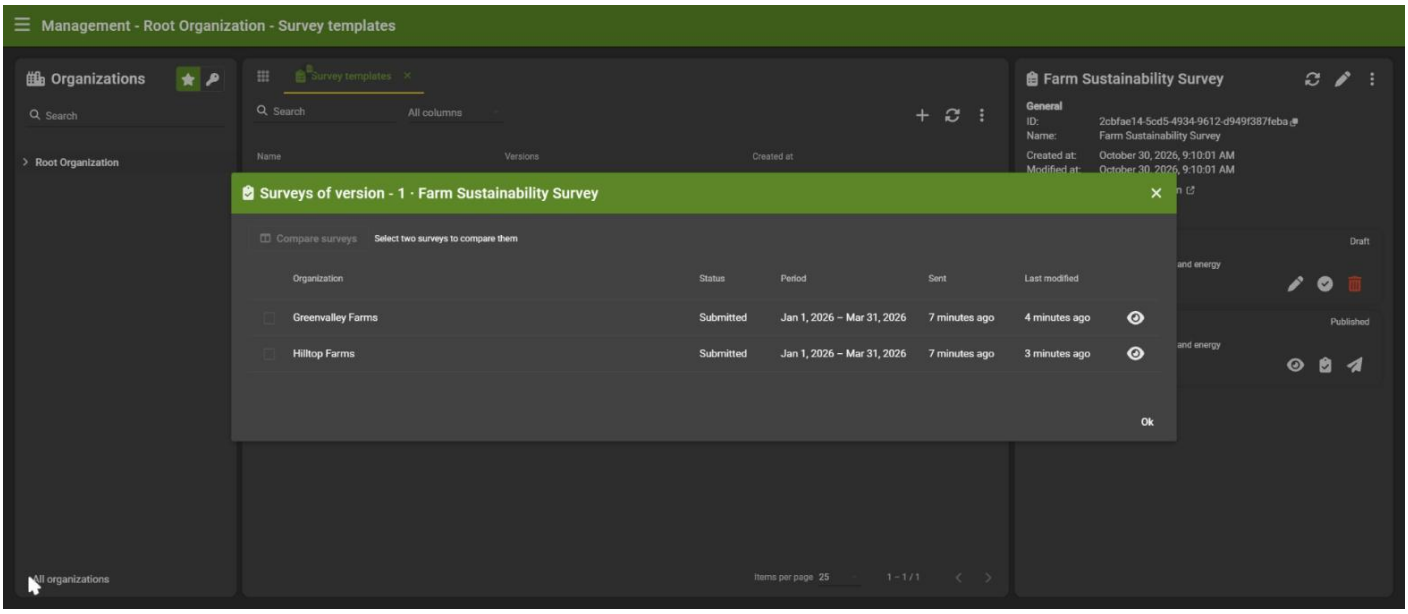
- how many answers are **different** and how many are the **same**,
- every question with both answers, and the **change** for numbers (absolute and percentage), dates (days) and multiple choice (what was added or removed),
- **Only show differences** to focus on what changed,
- **Swap** to reverse the direction of the comparison.







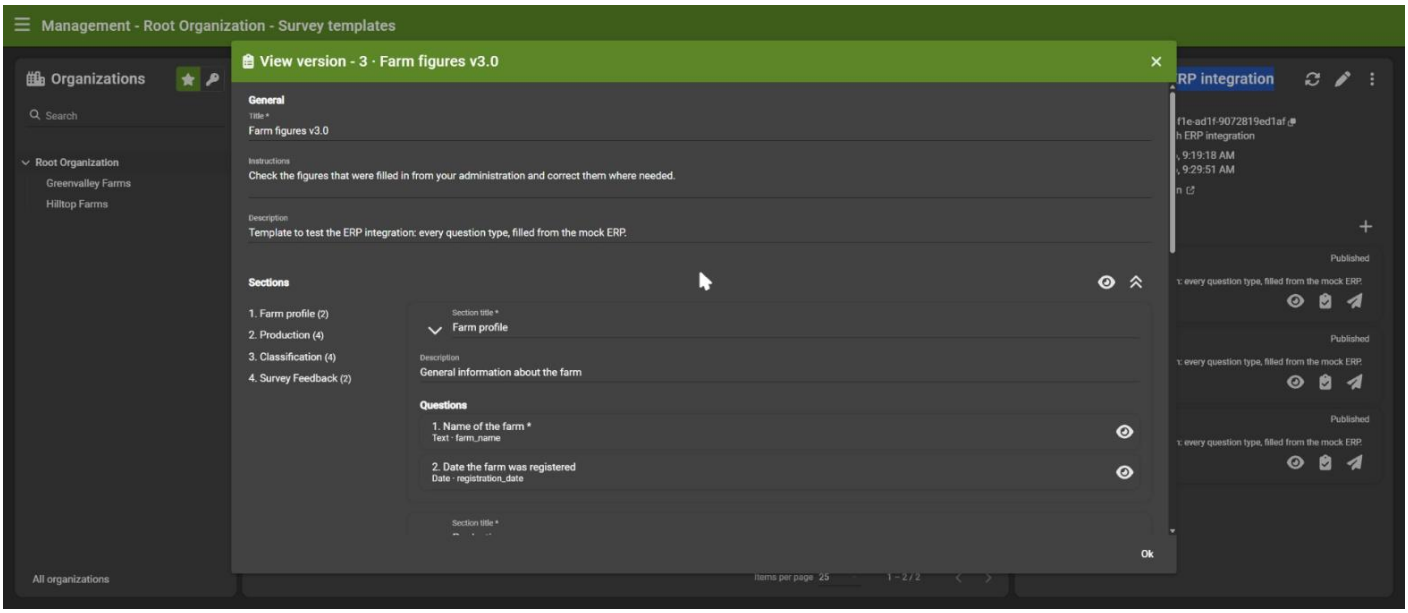
You can also start from a template: the **surveys** icon of a version lists every survey sent from it, with the option to select two of them and compare.

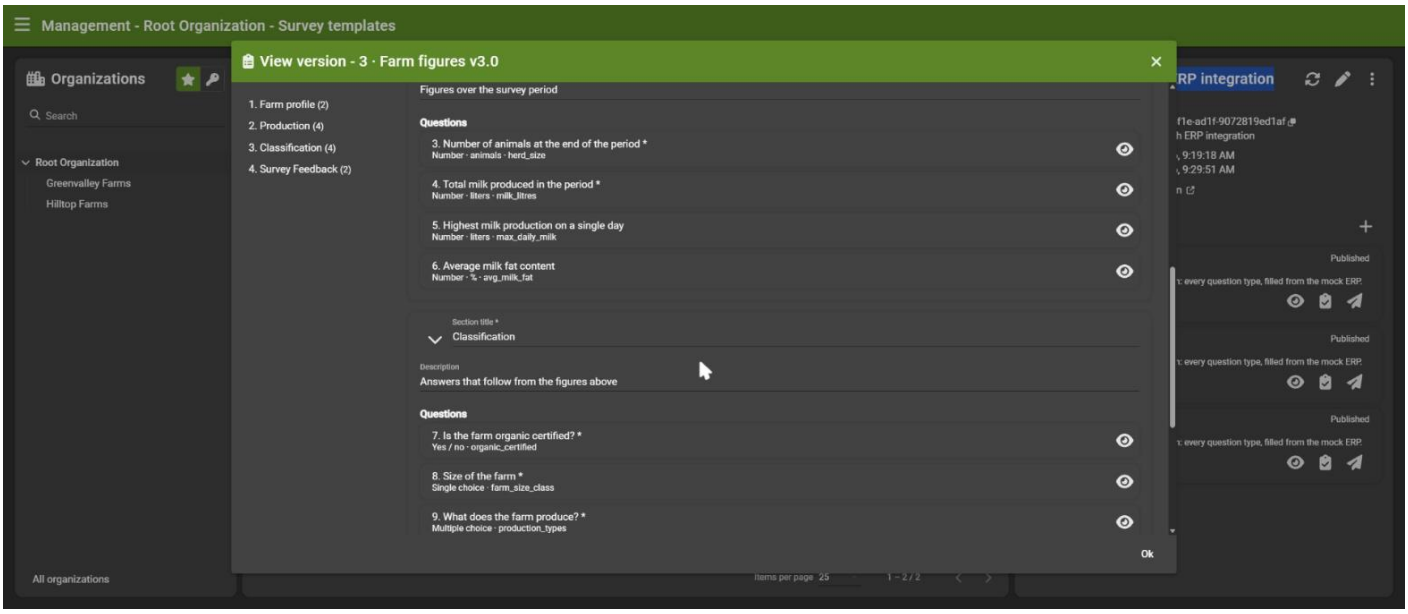


8. Fill in figures from your ERP

If your organization's ERP (or administration system) is connected, a survey can be **filled in with your own figures** the moment it is sent. The person answering then only has to **check and correct** instead of typing everything.

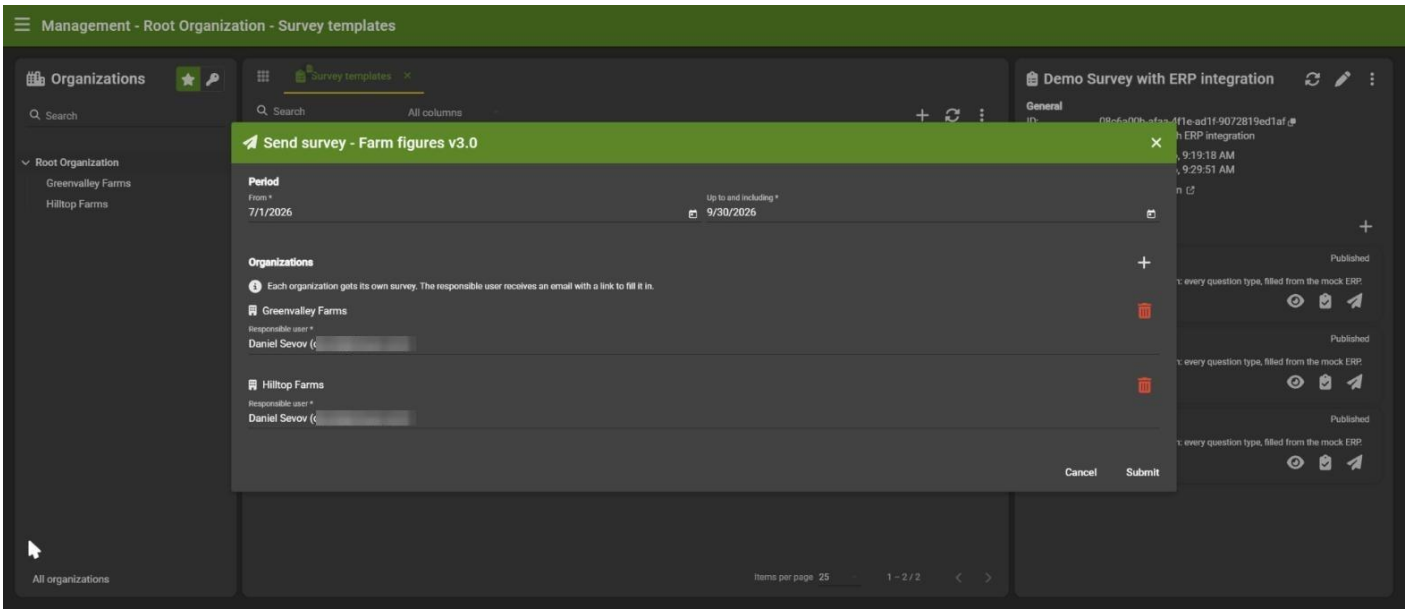
> **Example:** the template *Demo Survey with ERP integration* (version *Farm figures v3.0*) asks for the number of animals, the milk production over the period, the organic certification and more. Most of its answers come from the ERP, only the feedback questions at the end are answered by hand.

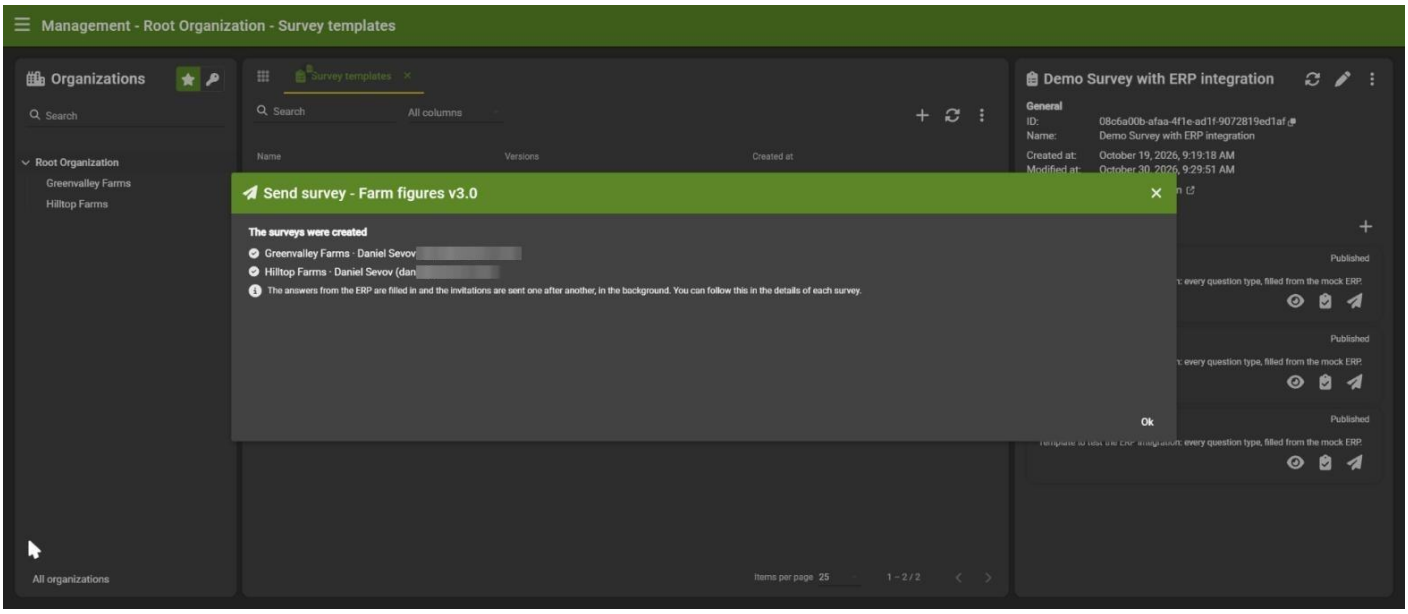




8.1 How it works

1. A **published version** is sent to one or more organizations as usual (see 3). Pick the period the figures are about, for example a quarter.
2. For every organization, the survey is created **right away**. In the background, the system then reads that organization's ERP for the survey period, saves the answers and **then** sends the invitation email. So when the responsible user opens the survey, the figures are already there.
3. Questions that are not linked to the ERP, such as free text or feedback, stay empty for the person answering.

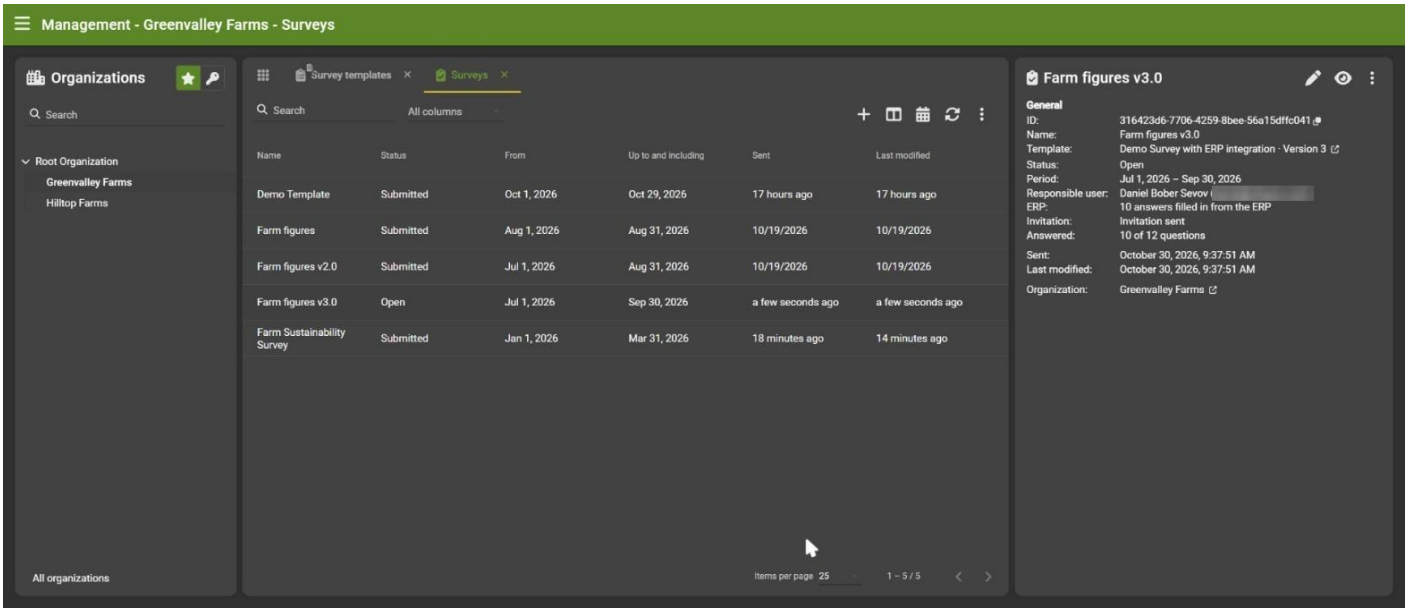




What the ERP provides is set up **per organization** by the Whysor team: which ERP data answers which question, and how it is calculated over the survey period (for example the total, the average or the latest value). Every organization can use a different ERP with a different structure, while the survey stays the same. That is also why the question **key** matters: it is what links a question to the ERP data.

8.2 Check the result

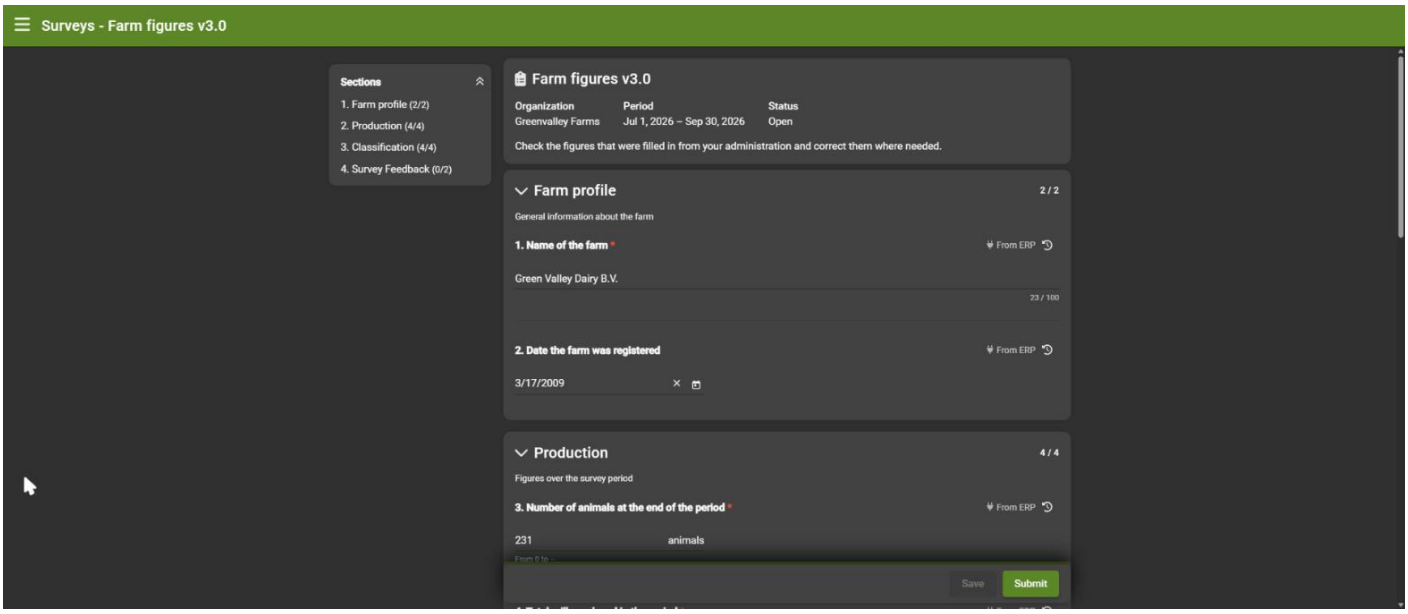
Open the survey in **Surveys**. The details show how many answers were filled in from the ERP, and how many questions are answered in total.

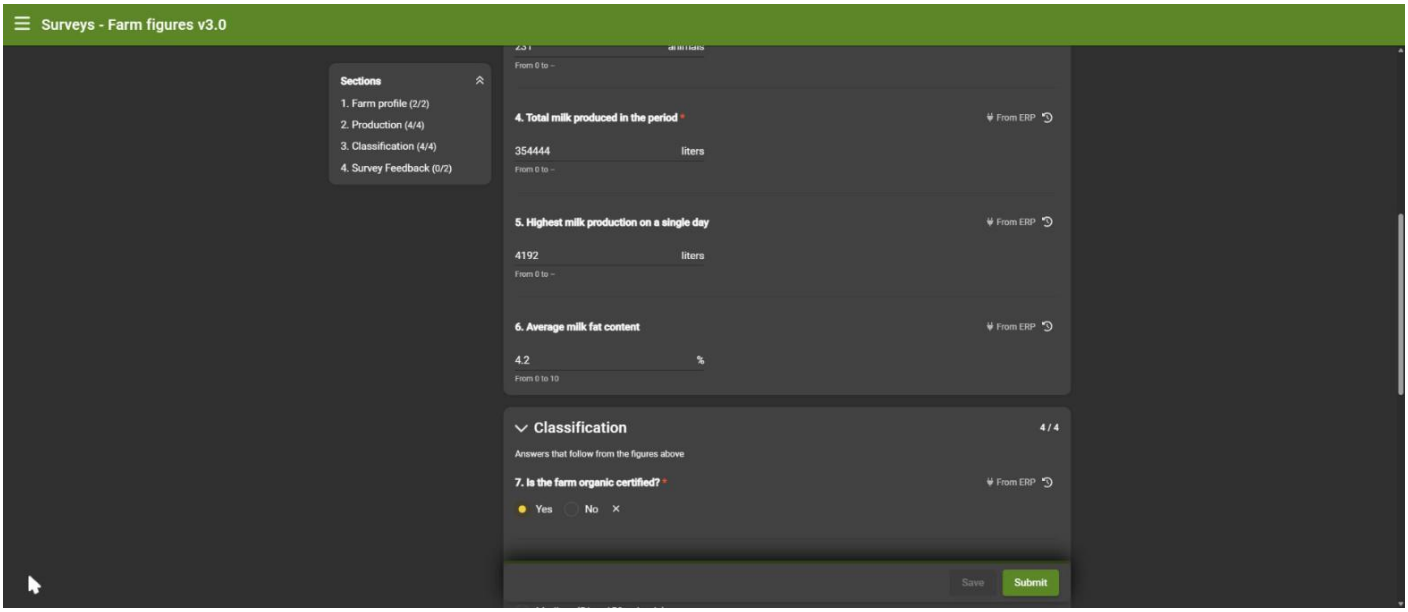


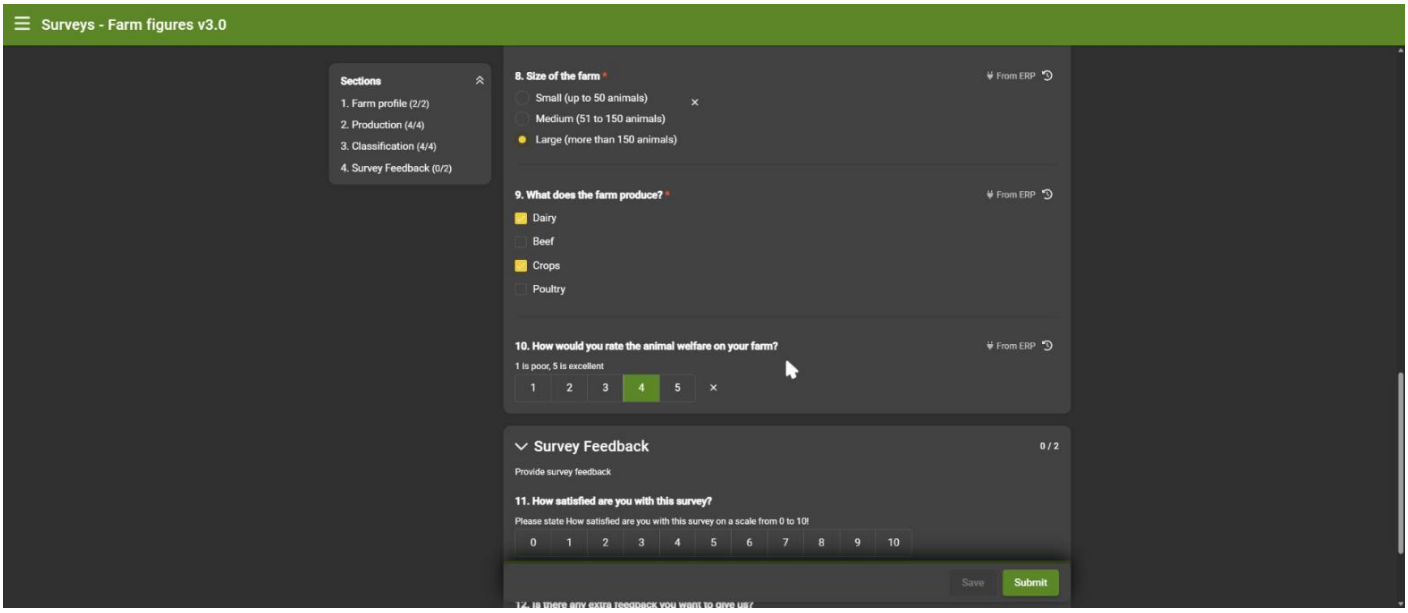
8.3 Fill in and correct

The answers that came from the ERP are marked **From ERP**. They work like every other answer:

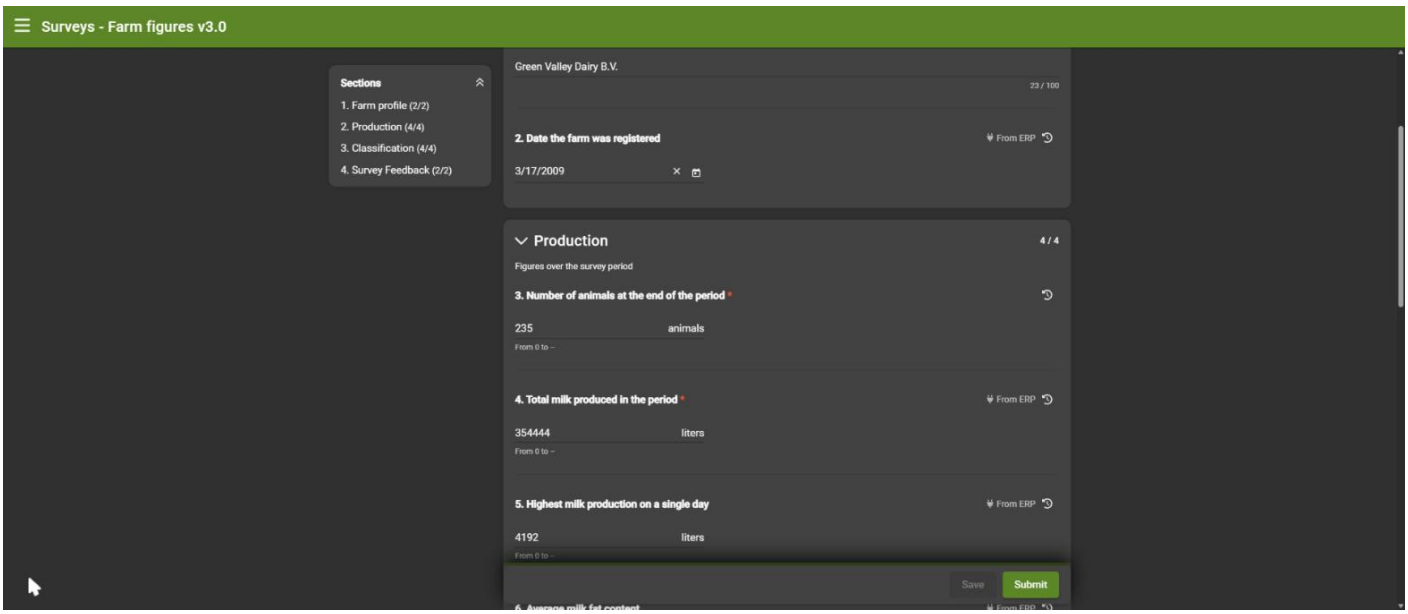
- Check the figures and **change** what is not correct. After a change, the mark disappears: it is now your answer.
- The **history** keeps the original ERP value, the new value, who changed it and when.
- Answer the questions that the ERP could not fill in, then **save** and **submit** as usual.

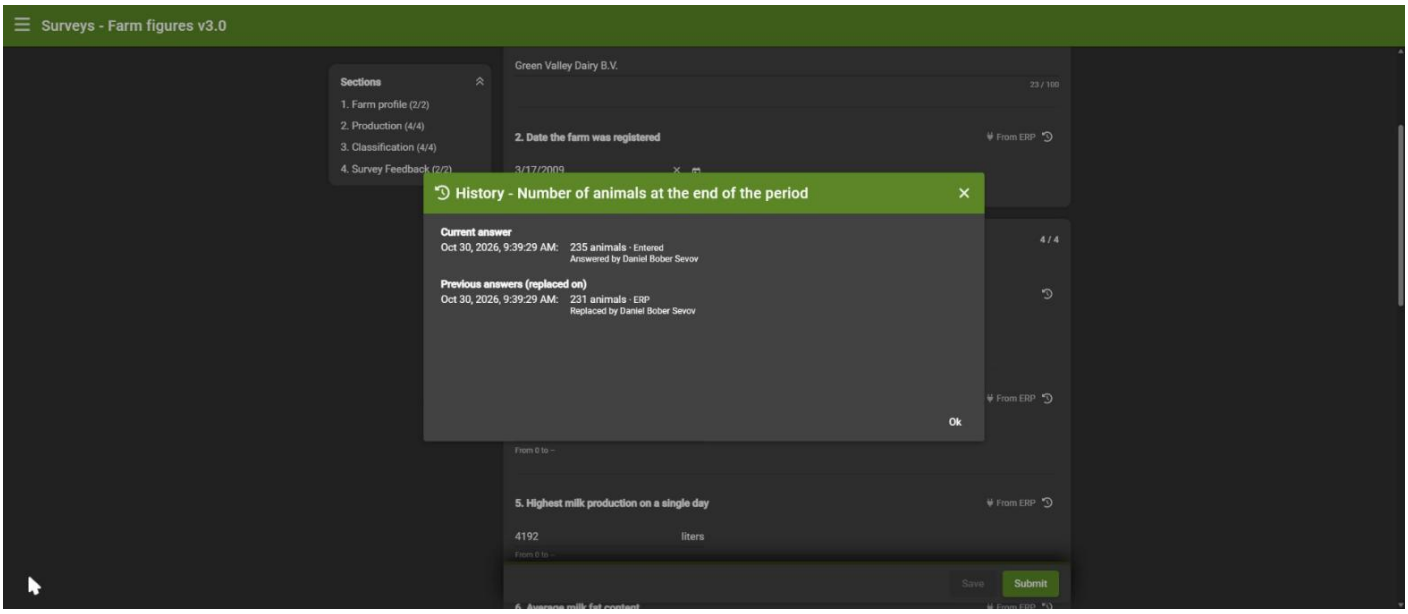




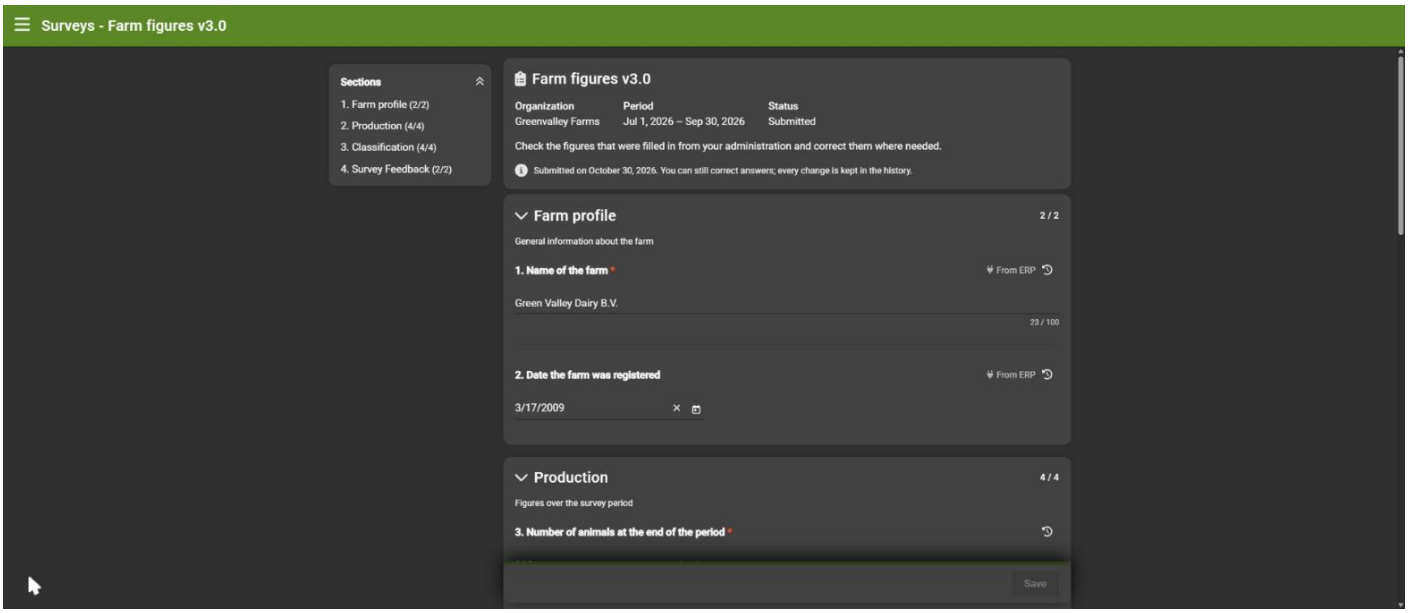


All question types can come from the ERP: text, numbers, dates, yes/no, single and multiple choice and ratings. A value that does not fit the question (for example an option that does not exist) is not filled in.



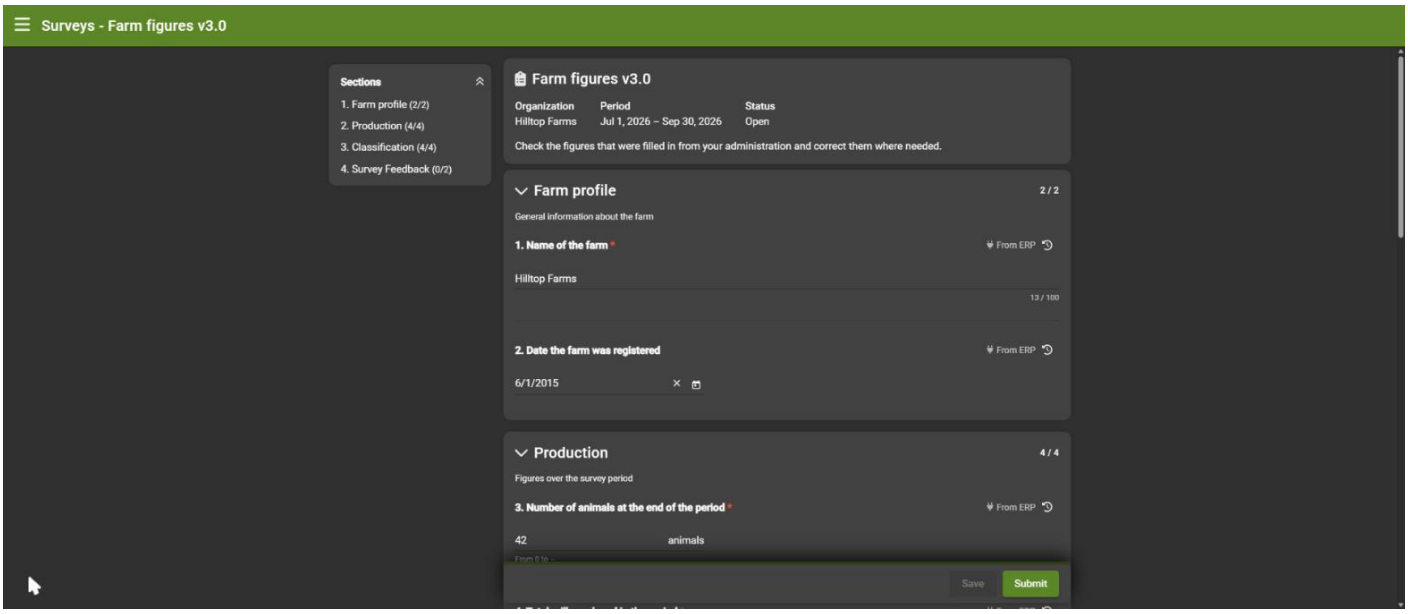


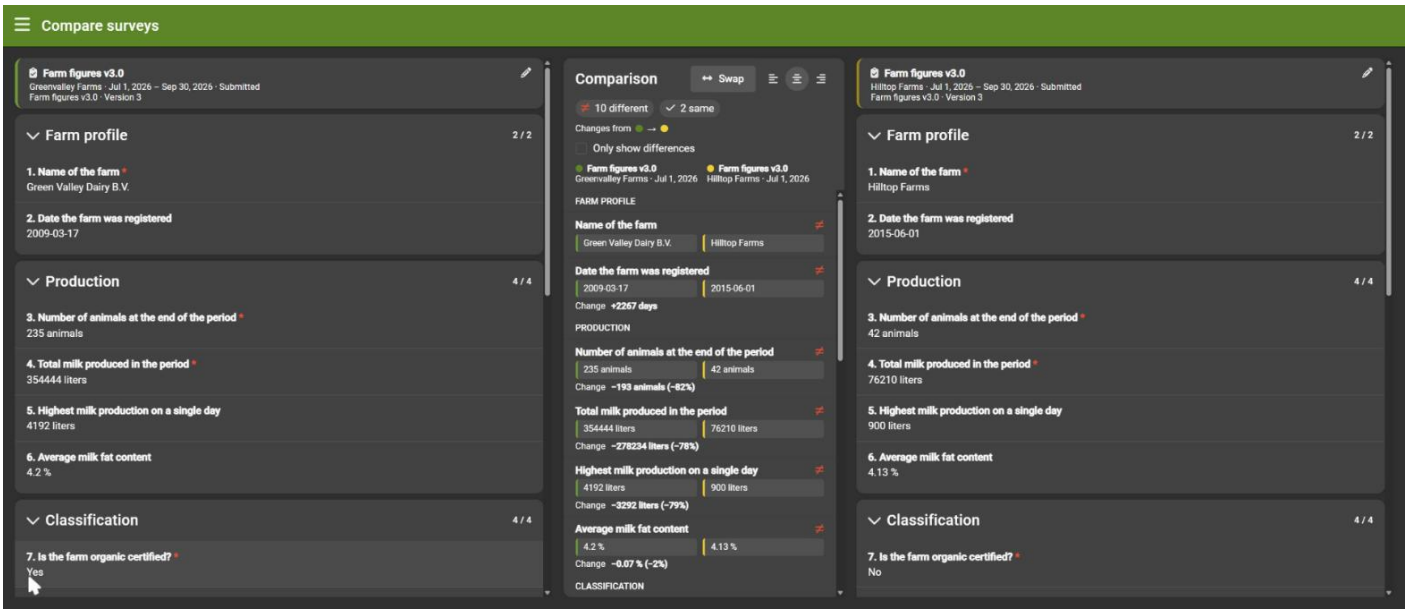
When the survey is submitted, it shows as submitted and can still be corrected afterwards.

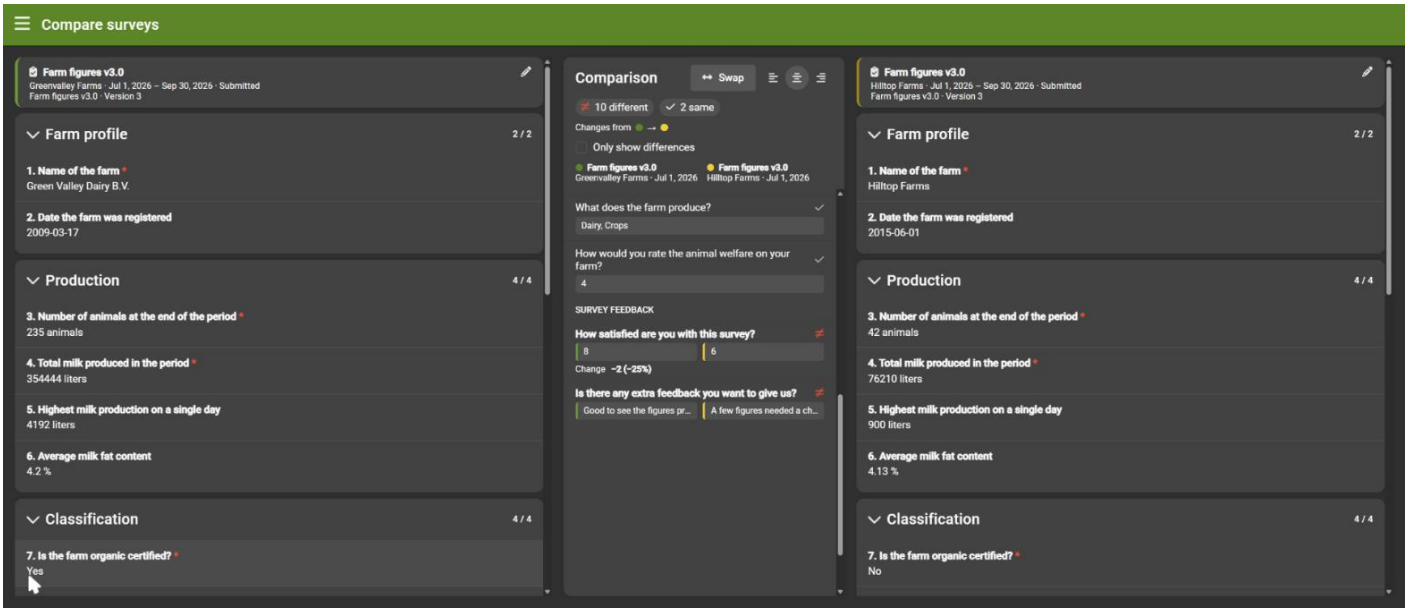


8.4 Different farms, one survey

Each organization gets its own figures from its own ERP, with the same questions. Comparing them shows the differences at a glance, including the change as a number and a percentage.


Surveys - Farm figures v3.0
Sections
1. Farm profile (2/2)
2. Production (4/4)
3. Classification (4/4)
4. Survey Feedback (0/2)
Farm figures v3.0
Organization
Hilltop Farms
Period
Jul 1, 2026 – Sep 30, 2026
Status
Open
Check the figures that were filled in from your administration and correct them where needed.
Farm profile
2 / 2
General information about the farm
1. Name of the farm *
From ERP
Hilltop Farms
13 / 100
2. Date the farm was registered
From ERP
6/1/2015
Production
4 / 4
Figures over the survey period
3. Number of animals at the end of the period *
From ERP
42
animals
Save
Submit

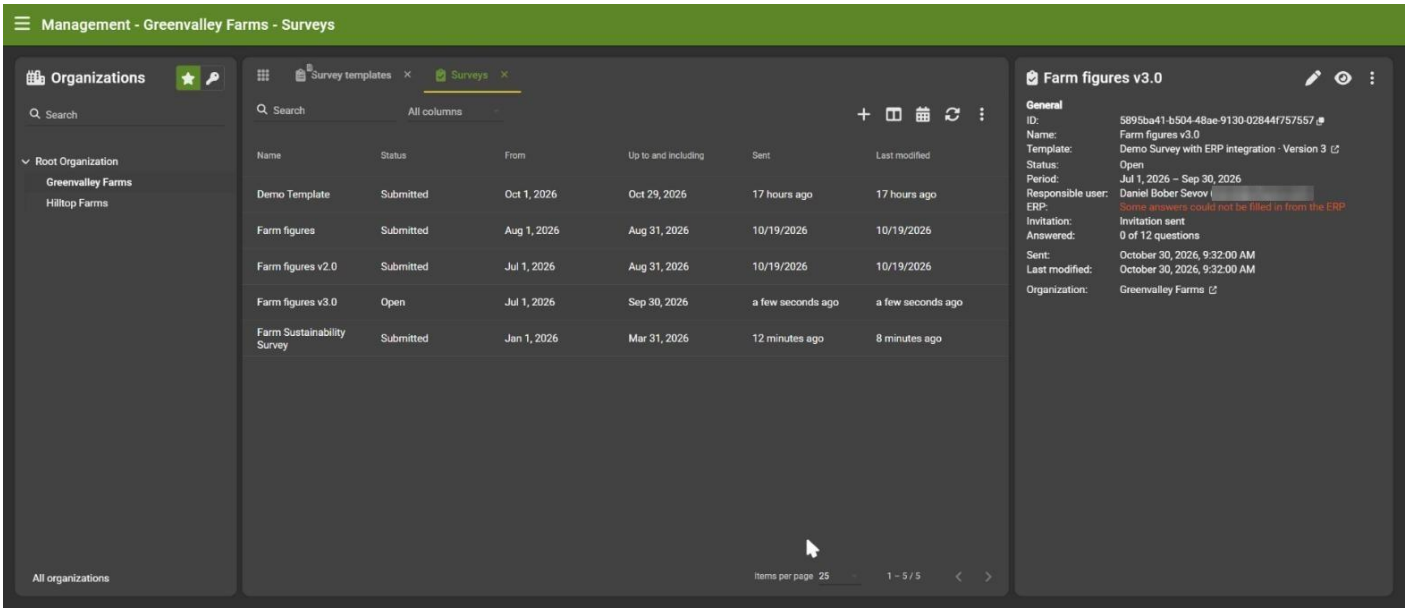

Compare surveys
Farm figures v3.0
Greenvalley Farms · Jul 1, 2026 – Sep 30, 2026 · Submitted
Farm figures v3.0 · Version 3
Farm profile
2 / 2
1. Name of the farm *
Green Valley Dairy B.V.
2. Date the farm was registered
2009-03-17
Production
4 / 4
3. Number of animals at the end of the period *
235 animals
4. Total milk produced in the period *
354444 liters
5. Highest milk production on a single day
4192 liters
6. Average milk fat content
4.2 %
Classification
4 / 4
7. Is the farm organic certified? *
Yes
Comparison
Swap
10 different
2 same
Changes from →
Only show differences
Farm figures v3.0
Greenvalley Farms · Jul 1, 2026
Farm figures v3.0
Hilltop Farms · Jul 1, 2026
FARM PROFILE
Name of the farm
Green Valley Dairy B.V.
Hilltop Farms
Date the farm was registered
2009-03-17
2015-06-01
Change +2267 days
PRODUCTION
Number of animals at the end of the period
235 animals
42 animals
Change −193 animals (−82%)
Total milk produced in the period
354444 liters
76210 liters
Change −278234 liters (−78%)
Highest milk production on a single day
4192 liters
900 liters
Change −3292 liters (−79%)
Average milk fat content
4.2 %
4.13 %
Change −0.07 % (−2%)
CLASSIFICATION
Farm figures v3.0
Hilltop Farms · Jul 1, 2026 – Sep 30, 2026 · Submitted
Farm figures v3.0 · Version 3
Farm profile
2 / 2
1. Name of the farm *
Hilltop Farms
2. Date the farm was registered
2015-06-01
Production
4 / 4
3. Number of animals at the end of the period *
42 animals
4. Total milk produced in the period *
76210 liters
5. Highest milk production on a single day
900 liters
6. Average milk fat content
4.13 %
Classification
4 / 4
7. Is the farm organic certified? *
No


Compare surveys
Farm figures v3.0
Greenvalley Farms · Jul 1, 2026 – Sep 30, 2026 · Submitted
Farm figures v3.0 · Version 3
Farm profile
2 / 2
1. Name of the farm *
Green Valley Dairy B.V.
2. Date the farm was registered
2009-03-17
Production
4 / 4
3. Number of animals at the end of the period *
235 animals
4. Total milk produced in the period *
354444 liters
5. Highest milk production on a single day
4192 liters
6. Average milk fat content
4.2 %
Classification
4 / 4
7. Is the farm organic certified? *
Yes
Comparison
Swap
10 different
2 same
Changes from →
Only show differences
Farm figures v3.0
Greenvalley Farms · Jul 1, 2026
Farm figures v3.0
Hilltop Farms · Jul 1, 2026
What does the farm produce?
Dairy, Crops
How would you rate the animal welfare on your farm?
4
SURVEY FEEDBACK
How satisfied are you with this survey?
8
6
Change −2 (−25%)
Is there any extra feedback you want to give us?
Good to see the figures pr...
A few figures needed a ch...
Farm figures v3.0
Hilltop Farms · Jul 1, 2026 – Sep 30, 2026 · Submitted
Farm figures v3.0 · Version 3
Farm profile
2 / 2
1. Name of the farm *
Hilltop Farms
2. Date the farm was registered
2015-06-01
Production
4 / 4
3. Number of animals at the end of the period *
42 animals
4. Total milk produced in the period *
76210 liters
5. Highest milk production on a single day
900 liters
6. Average milk fat content
4.13 %
Classification
4 / 4
7. Is the farm organic certified? *
No

8.5 When the ERP cannot be reached

The ERP is read **once, when the survey is sent**, and it gets a limited time to answer. If it cannot be reached, or does not answer in time:

- the survey is **still created** and the **invitation is still sent**,
- the survey details show a red **"Some answers could not be filled in from the ERP"**. Hover over it to see which question failed and why,
- the person answering simply fills in the questions by hand.



Once the ERP connection is working again, delete the survey (possible as long as it is not submitted) and send the version again: the figures are then filled in. **Send invitation again** only repeats the email, it does not read the ERP again.

> **Good to know:** figures from the ERP and the details prefilled from the account (see 2.8) can be used in the same survey. An answer that is already there is never overwritten.

---

9. Quick tips

- Give questions a **key** that you will recognize: it connects the same question across versions.
- Use **required** sparingly; it is easier to complete a survey that only asks what is needed.
- Use **prefill** for company data, and **conditional sections** to keep the survey short.
- Always try the **preview** before you publish: a published version cannot be changed.

- Need to change a published template? Create a **new version**, the surveys that were already sent stay as they are.

Created 2026-10-30 07:55:01 UTC by Daniel | Whysor
Updated 2026-10-30 08:12:16 UTC by Daniel | Whysor