



# **WUFOO Training**

## **08/25/2022**

For State Convention of  
Baptists in Indiana, in partnership with the  
Alabama Baptist State Board of Missions



STATE CONVENTION OF  
**Baptists in Indiana**



**Alabama Baptist**  
STATE BOARD OF MISSIONS

# Wufoo Reference Guide

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This guide is meant to be used as a companion to the training for SCBI held on August 25, 2022 or to help introduce/train someone just beginning to use Wufoo.

The recording of that training is located here -  
<https://vimeo.com/743423166/00f755fd4a>

## Outline

### 1 - What is An Online Form? (Page 1)

Types of form applications.

### 2 - General Best Practices, Form Design (Pages 2-3)

Things to keep in mind when designing your forms.

### 3 - Using Wufoo (Pages 4-5)

Things you need to know about the most common ways you'll be interacting with Wufoo on a regular basis.

# What is a online form?

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**An online form is a way to collect, organize, and store information to be used for any number of purposes. There are many different ways to build and use forms to help you accomplish your goals.**

## **Registration**

Any gathering of people for a particular purpose needs to involve registration. Free events, public events, private events, projects open to the public, etc. all need to have registration. Doing so provides you with very important information for things such as, helping you make decisions about future events or gathering contact information of attendees to let them know about event changes or cancellations. You may have already lived by this practice with the traditional paper forms, but digital forms allow for additional advantages like immediate electronic payment processing.

## **Feedback**

After any event, project, initiative, etc. sending a feedback form to participants is helpful to collect impressions, likes or dislikes, and other information that can help you make decisions for future plans. Even if a small number of people fill out a feedback form, it provides you with some information over no information.

## **Quizzes**

Forms can be turned into quizzes as a part of trainings or evaluations to help you gauge the effectiveness of material or success in training participants.

## **Purchasing**

Order forms can be made as a simple purchasing option or store supplement for digital payments. One example could be that your event registration forms can include merchandise in addition to registration costs or a form can be made for an at-event shop.

# General Best Practices, Form Design

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## 1 Ask What You Need

If you need the information ask for it. Don't assume it will be collected somehow later. For example, make sure you ask for the responder's permission to send future emails on forms whenever appropriate. This is an integral way to build email lists from your events and other initiatives for future communications/marketing. Don't overburden your responder but don't leave out questions that provide you crucial information. Knowing what you'll need to ask is a very important first step.

## 2 Control the Response

Guiding the responder's answers is crucial to getting more responses and better quality answers/data with less editing afterward. This primarily comes through question designs and appropriate fields for the particular information you are looking for.

Whenever you can, ask specific questions and not open ended questions. For example, ask the responder to rank a provided list of event features over asking them what they liked about the event. This rule may generate a longer form with more questions, but easier to answer questions are better than fewer questions requiring more thinking by the responder. Placing more to think about or do on the responder will discourage participation.

What did you like about the event?

VS

How would you rate these event elements?

	Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
Worship Band	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conference Length	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Confine the field answer to the format you need or, in other words, don't give them an open question when you need their phone number. Use a field with rules that makes their answer conform to the format of the information you need - number only, specific format, etc.

Phone Number

VS

Phone Number

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## 3 Be Clear and Brief

Try not to use vague or ambiguous language in your questions, but be as succinct as you can. Use the help text to your advantage to help simplify the questions you ask.

# General Best Practices, Form Design

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## 4 Group and Identify Questions

Taking time to add grouping and labeling to related questions, helps the responder to more quickly understand what is being asked of them. Lowering the burden on the responder and making replying to the form easier should be an overarching goal for everything that you do with the form.

The image compares two form designs side-by-side. The left design, labeled 'Bad practice' with a red line, shows a 'Personal' section with three separate input fields for 'First name', 'MI', and 'Last name', followed by an 'Email' field. Below this is a 'Contact' section with a 'Phone' field (including a country code dropdown), an 'Address' field, an 'Address 2' field, and three separate fields for 'Zip code', 'City', and 'State' (with a dropdown for the state). The right design, labeled 'Alternative' with a green line, shows the 'Personal' section with a single wide input field for 'First name', a small 'MI' dropdown, and a single wide input field for 'Last name', followed by an 'Email' field. The 'Contact' section is identical to the 'Bad practice' design.

## 5 Use Form Logic

When possible, use conditional logic to simplify the form for the responder. Conditional logic uses if/then statements that can show or hide questions based on previous responses or direct the responder to certain locations based on how he or she answers the form. In other words, you can manipulate the questions or content to be more relevant to your responders. In some cases this might drastically reduce the amount of questions for some responders encouraging participation.

For a specific walkthrough on this concept visit:

<https://www.wufoo.com/guides/conditional-logic-and-branching/>

# Using Wufoo

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## Getting Started and Help Center

If you haven't had any training, Wufoo has a great getting started page that can help you with all the basics. Use the search bar for any specific topics you might have questions on or how to do once you've mastered the basics.

[https://help.wufoo.com/articles/en\\_US/kb/Getting-Started-With-Wufoo](https://help.wufoo.com/articles/en_US/kb/Getting-Started-With-Wufoo)

## Form Building Checklist/Progression

- Start from scratch / Use a template / Duplicate a previous form
- Title the form and create a helpful intro relative to the purpose of the form in the subheading
- Build questions and confirm if questions should be required or optional
- Label sections of questions or create page breaks and appropriately order questions (generally demographics are asked last in forms other than registrations)
- Write confirmation email and input desired from/reply-to email
- Create branching and logic when / where appropriate
- Customize form theme if necessary
- Add pricing for conference registration or purchases
- Preview form look and function, then share

## Form Design Customization

Wufoo allows customization of form themes with patterns, logos, fonts and other art. If you are wanting to do a header image, it is simpler to design an image 640x80 over trying to import a logo file separately. If you are using the Newfangled theme as a base, your logo can be up to 960px in width. Images used for background will be tiled/duplicated into a pattern.

## Question Writing

You can get far with your forms not knowing much about writing questions, but there is an art to question writing that can help make sure the answers are accurate. These articles are helpful if you want to take a deeper look at this subject.

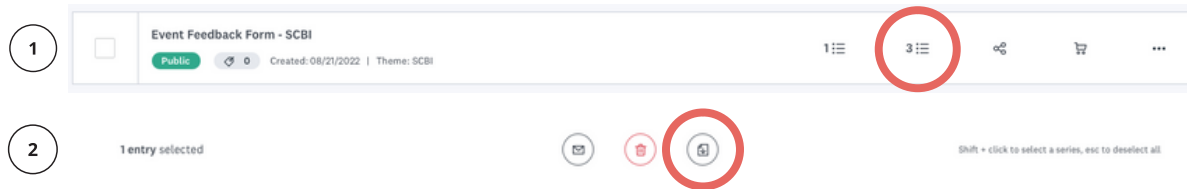
<https://wpforms.com/survey-question-best-practices-for-boosting-form-conversions/>

<https://www.qualtrics.com/blog/writing-survey-questions/>

<https://www.pewresearch.org/our-methods/u-s-surveys/writing-survey-questions/>

# Using Wufoo

## Downloading Entries/Registrations



The most expedient way to gain access to your responses is to visit the forms section after you login, click entries, then use the checkboxes to your left to download select responses or the entire list. A box will appear at the bottom of your screen to download the entries you have selected on the following page. There are other methods to get this information. See the guide at the link below for more detailed information.

[https://help.wufoo.com/articles/en\\_US/kb/Download-Entries?bc=Managing\\_Entries](https://help.wufoo.com/articles/en_US/kb/Download-Entries?bc=Managing_Entries)

## Payment Processing

Integrating payments and purchasing into your form can get pretty complicated. Visit the payment collection guide from Wufoo to learn more about the basic setup.

[https://help.wufoo.com/articles/en\\_US/kb/Collecting-Payments?bc=Payment\\_Integrations](https://help.wufoo.com/articles/en_US/kb/Collecting-Payments?bc=Payment_Integrations)

Coupons are also a possibility. For a step by step guide visit:

[https://help.wufoo.com/articles/en\\_US/kb/Collecting-Payments?bc=Payment\\_Integrations](https://help.wufoo.com/articles/en_US/kb/Collecting-Payments?bc=Payment_Integrations)

## Permissions

Whether your user account within an organization is an admin or not can dictate what is possible for you to control. Unless you have users you don't think you can trust with full capabilities, it is recommended that your organization make any user creating their own forms and processing the results be made an admin.

## For anything else

There are a number of specifics not covered in this reference guide. For any detailed guides on a number of topics visit Wufoo's help pages. [help.wufoo.com](https://help.wufoo.com)



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