TX Wufoo Standard Operating Procedure

What is Wufoo?

Wufoo is an online form builder with cloud storage. Users are able to build customer online forms that can be used to collect data, files, and to automate workflows. Some CSBG State Offices use Wufoo to gather, track, and respond to questions from the Network in a timely manner. Responses are saved to help ensure frequently asked questions are answered consistently. Reports can be generated and used to determine common trends, helping to identify potential T/TA needs. The approximate annual cost of Wufoo cost ranges from approximately $170 to $2,200, depending on the plan. To learn more about Wufoo, please click **here**.

Creating Forms

When building a form begin with Form Builder, which allows for choices in field types, configuring branching to only show what is needed and opening other fields based on selections made, duplicating prior forms, reordering fields on existing forms, and adding up to 100 fields per form.

Copying existing forms is allowable, and adjustments can be made to the copied form, allowing for less time and effort in creating from the beginning.

Images, links, and formatting text are available by using HTML and forms can have multiple pages with page breaks. Using Rule Builder allows for branching that can show or hide fields, skip pages, and customize messages based on what is selected when the end-user is completing the form.

Wufoo's capability to change language, by displaying translations for the default text, provides an opportunity to reach additional customers.

Managing Forms

The ability is available to edit a live form, view a form as staff are working on it, make a form public or private, copy a form, and make fields required.

Wufoo has a mobile site allowing staff to review forms, entries and send notifications while out of office. If staff are responsible for a particular form, utilize this tool to ensure responses to end-users are timely.

Field Types and Settings

The fields are Likert, rating, time, price, multiple choice, name, date, dropdown, email, checkboxes, single line text, address, phone, DocuSign, website, number, and the file upload. The file upload field can be increased from 10 MB to 25 MB.

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Be creative with forms but be mindful that forms that are too long or convoluted can be difficult for the end-user to complete.

Form Settings, Rules and Logic

Fields can be required. Be sure to add instructions for the end-user to provide additional context or instructions for filing out a specific field(s) in the form. The form's instructions will appear in a separate box.

Once a form is completed, ensure you have chosen to send a confirmation email for each submission to notify the end-user that their response to the form was received.

Rule Builder creates ways to show and hide fields, skip pages, and show custom confirmation messages based on what the end-user selected when completing the form. Ensure the form is built with the ability to move past fields the end-user does not need to complete.

Reports

Reports are to be pulled every quarter for review and analysis of concerns, issues, and responses that are received. Reports are created in CSV or Excel to easily sort by each field (i.e., date, name, staff response, and topic).

Notifications

Emails will be sent to each staff member designated within the organization once the form is built and ready to use. If questions are coming in for a department, (i.e., CSBG, LIHEAP, WAP) then everyone can be notified of the question via email and whomever is first available to respond can send an email from the notification. Response time should be no longer than 48 hours.

The ability to enter your response into the question/inquiry originally submitted allows for searching prior questions to ensure timely and consistent responses provided to the network.