

Data Flow

The Data Flow functionality provides the option of **synchronizing data** between the **form and Contact Manager** if they were distributed using the following **distribution methods**:

Email distribution to the addresses from the Contact Manager;

Restricted by unique codes;

Publish to the User Portal and Mobile App.

This article provides full instructions on how to use and adjust the feature.

- [How to apply the Data Flow feature](#)
- [How to set up the Mapping](#)
- [Mapping Rules](#)

How to apply the Data Flow feature

- Click on the **Setup Data Flow** button on one of the above mentioned Launch pages.

1 Email Letter

From: anna.indychenko@form.com

Subject: Laundry tech USEIT!

Body:

[Edit Email](#)

- ### 2
- Email form to addresses I enter manually
 - Import email list for bulk form distribution
 - Email form to people from Contact Manager

3 Contact Manager

Anna Test

4 [Change the Group of Contacts](#)

Currently all (2) contacts are selected [Manage selected contacts](#)

5 [Setup Data Flow](#)

- ### 6
- Capture respondent email address
 - Hide the respondents' email addresses in the reports.
Please note: the addresses will still be visible in Dashboards.

7 [Send / Schedule Email](#)

- On the **Data Flow** page you can setup mapping between form questions and fields of the **Contact Manager**.

Form Items

-Search-

- [Q1] Do you like it?
- [Q2] ID
 - [Q2.A1]
- [Q3] Name z
 - [Q3.A1]
- [Q4] Your data
 - [Q4.A1] City
 - [Q4.A2] Address
- [Q5] Have you fixed it?
- [Q6] click here
- [Q7] why haven't you fixed it?
- [Q8] What details have you replaced or fixed ?

Overwrite with empty values

Contact Manager Fields

-Search-

- Name
- Email
- ID
- Login
- Language

The **Form Items** pane lists all form questions. **Icons** which are located next to questions **indicate question types**.

-Search-

- [Q1] Do you like it?
- [Q2] ID
 - [Q2.A1]
- [Q3] Name z
 - [Q3.A1]
- [Q4] Your data
 - [Q4.A1] City
 - [Q4.A2] Address
- [Q5] Have you fixed it?
- [Q6] click here
- [Q7] why haven't you fixed it?
- [Q8] What details have you replaced or fixed ?

Overwrite with empty values

In the **Contact Manager Fields** pane you will see the list of Contact manager fields, and their format.

Fields that are marked with the Lock icon can be used for the From synchronization to pre-populate survey questions only, for example: ID field that is used as the unique identifier the To direction of synchronization for such fields is not allowed.

Contact Manager Fields

-Search-

- Name
- Email
- ID
- Login
- Language

Apply Mapping

How to set up the Mapping

To setup mapping follow these steps:

Form Items

-Search-

[Q1] Please select the most suitable option for you.

- [Q1.A1] Daily
- [Q1.A2] Weekly
- [Q1.A3] Monthly

[Q2] Do you like it?

[Q3] ID

- [Q3.A1]

[Q4] Name z

- [Q4.A1]

[Q5] Your data

- [Q5.A1] City
- [Q5.A2] Address

Overwrite with empty values

Contact Manager Fields

-Search-

- Name
- Email
- ID
- Login
- Language

Apply Mapping

- Select survey item for the mapping. You can select separate answer choices for the questions that allow multiple answers selection, for example: [Check All that Apply](#).
- Map selected survey item with the field of the Contact Manager from the right pane.
- Choose the data flow direction:
 - To** - after survey is completed, data overwrites Contact Manager data.
 - From** - when respondents open the survey, questions will be pre-populated with the data from the Contact Manager.
 - To and From** - in this case data flows in both directions.
- Both **From** and **To and From** types of synchronization can be used to create new contacts in the Contact Manager for new respondents.
- Click the **Apply Mapping** button to apply mapping for the selected items.
- Follow steps 1-4 again to apply mapping to other items.

In the Address
 Overwrite with empty values Apply Mapping

The **Overwrite with empty values** option is used if respondents leave a question unanswered and you want delete data from the appropriate field in the Contact Manager. This is applicable for the **To** and **To and From**

From synchronization types. If this option is not activated and respondents leave unanswered questions, Contact Manager records will remain the same.

Mapping Rules

The following table lists Form Items and compatible Contact Manager fields:

Question Type	Data Flow Direction	Contact Manager Fields Format
Pick One or 'Other', Pick One with 'Comment' Dropdown Box	<< << >> >>	General - text of both survey item and Contact Manager field must match. Number>0, Decimal number - sequence number of the survey item is used. Decimal values are truncated to Integer.
Check All that apply Listbox	<< << >> >>	General - "Yes" is used as a selected value, "No" as not selected. "1" is used as a selected value, "0" as not selected for the following fields: Decimal Number Currency, \$ Percent, %
Single Line Text with Pre-format Options (not formatted), Multiline	<<	Any Contact Manager field
Single Line Text with Pre-format Options (any format type), Multiline	>>	General
Single Line Text with Pre-format Options (formatted)	<< << >> >>	Format of the survey item and Contact Manager field must match. General Number>0, Decimal number Currency, \$ Percent, % Email Date
Rate different items along the scale of your choice	<< << >> >>	General - text of both survey item and Contact Manager field must match. Number>0, Decimal number - sequence number of the question column is used. Decimal values are truncated to Integer.
3D Matrix	<< << >> >>	Mapping can be set with all Contact Manager fields depending on the question items format. Please see above all possible cases for Pick One, Check All, Dropdown and Text elements.
Numeric Allocation	<< << >> >>	Any numeric field in Contact Manager: Number>0, Decimal number Currency, \$ Percent, % Email Date

Some form and contact manager fields have mapping peculiarities:

- Answer choices for the multichoice question types such as **Check All that Apply** and **Listbox** that are left not answered may overwrite data in the Contact Manager with the zero or empty values if the **To** or the **To and From** mapping type is set.
- You can map **Rate different items along the scale of your choice** question type with the **Percent, %** data field in the Contact Manager. The data will be converted in the following way: scale will be treated as 100%, which will be divided among all items in equal parts. For example: each item in the five-items scale will possess 20%; first selected item corresponds to 20%, second item to 40%, third item to 60%, fourth item to 80% and the fifth one to 100%.