

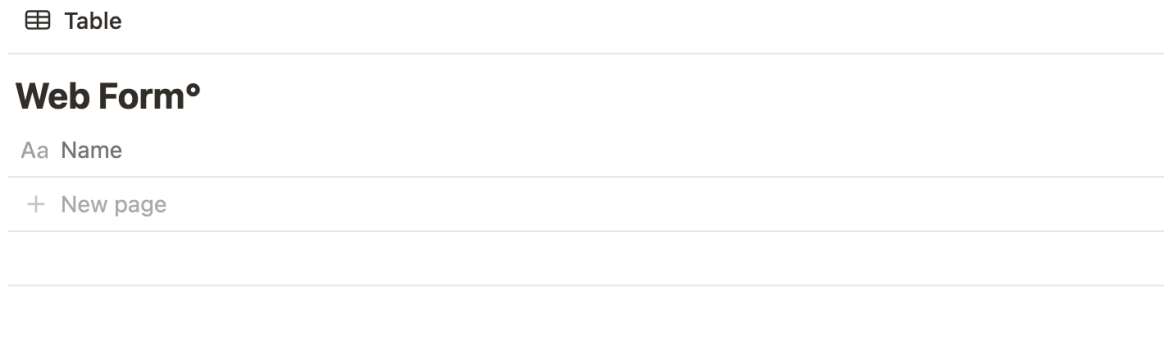
How to: Notion Forms

Objective

This SOP outlines the steps to create a web form in Notion for collecting data from users without Notion access.

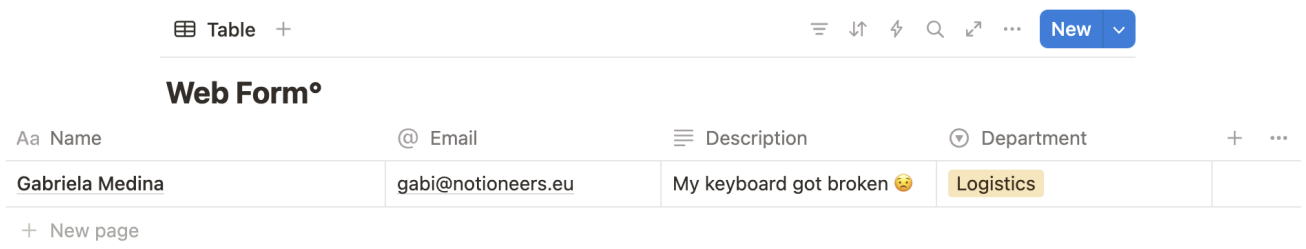
Key Steps

Step 1: Create a Database



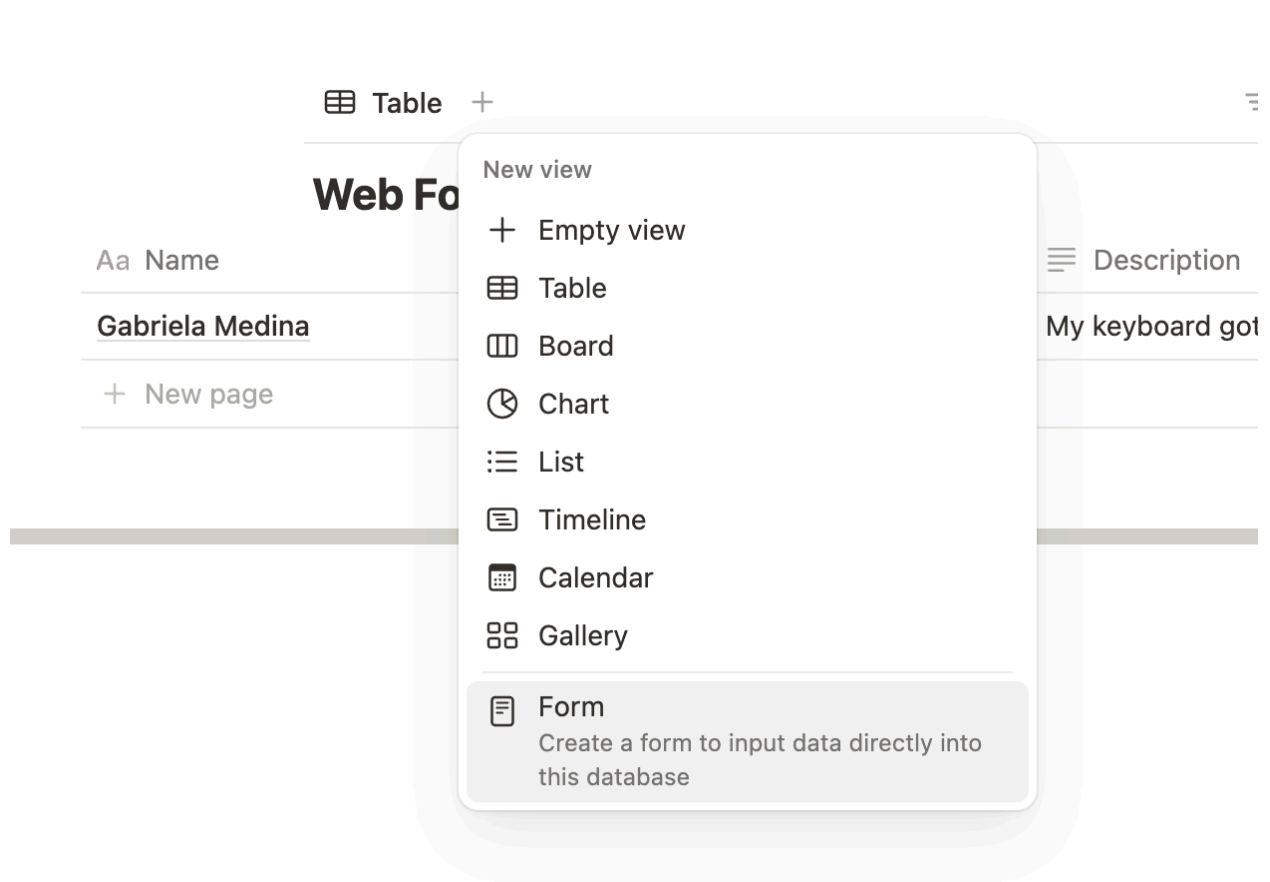
- Open Notion and create a new database.
- Name the database, ex. 'Web Form'.

Step 2: Add Properties to the Database



- Add the properties to the database according to the use you'll give it:
 - Name (Text)
 - Email (Text)
 - Description of the Problem (Text)
 - Department (Select)

Step 3: Create a Form View



- In the database, create a new view and select 'Form'.
- Ensure the properties you added are included in the form.

Step 4: Configure Form Fields

Form title

Description (optional)

🔒 Only members at Notioneers can fill out this form.

Change

Name*

Respondent's answer

Email

Respondent's answer

Description

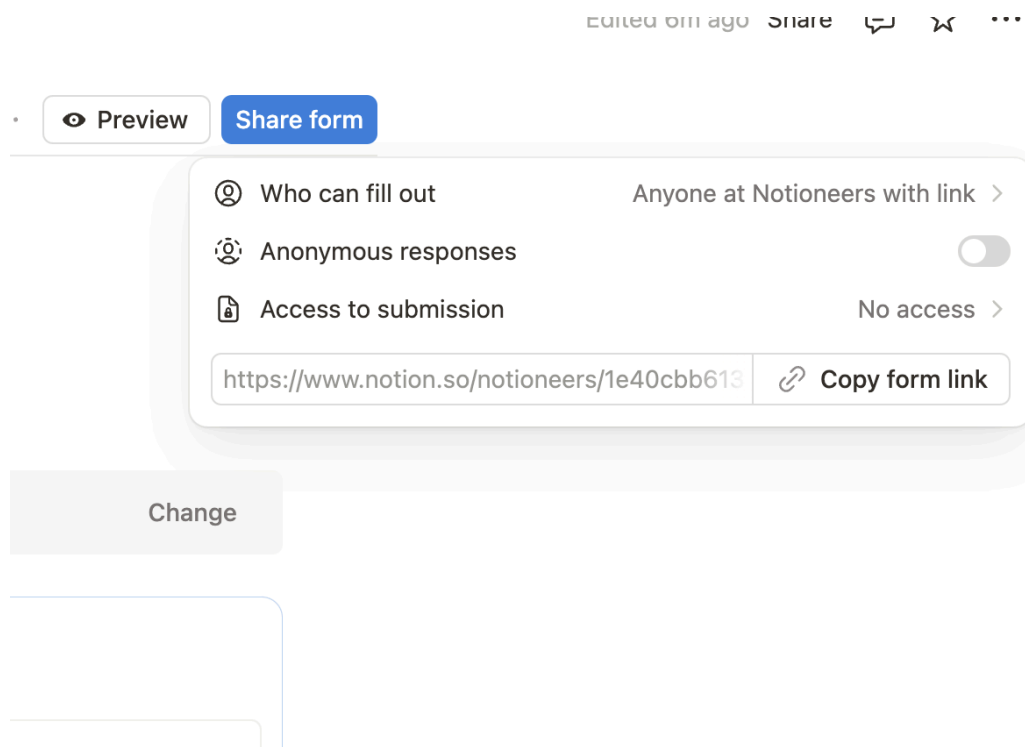
Respondent's answer

Question options

- * Required ☒
- ≡ Description ☐
- ↔ Long answer ☐
- ⚙ Question type Title >
- 📄 View linked property >
- 🔗 Sync with property name ☒
- ↕ Move question >
- 🗑 Delete question

- For each field, set whether it is required.
- Add descriptions to fields as necessary (e.g., 'Describe your issue in detail').
- Adjust field sizes for long answers.

Step 5: Share the Form



The screenshot shows the 'Share form' modal in Notion. At the top, there are tabs for 'Preview' and 'Share form', with 'Share form' being the active tab. Below the tabs, there are three settings: 'Who can fill out' set to 'Anyone at Notionees with link', 'Anonymous responses' with a toggle switch, and 'Access to submission' set to 'No access'. At the bottom, there is a text box containing the form link 'https://www.notion.so/notionees/1e40cbb613' and a 'Copy form link' button. A 'Change' button is visible below the modal.

- Choose to share the form publicly or with specific users.
- Copy the form link for distribution.

Step 6: Embed the Form on a Website

- Use the provided iframe code to embed the form on your website.

Step 7: Test the Form

- Open a private window in your browser to test the form as an end user.
- Ensure that the form appears correctly and functions as intended.

Step 8: Review Submitted Responses

- Check the database to see the responses submitted through the form.

Cautionary Notes

- Ensure that sensitive information is handled according to your organization's data privacy policies.
- Test the form thoroughly before sharing it widely to avoid user frustration.

Tips for Efficiency

- Use templates for common form fields to save time on future forms.
- Regularly review and update the form based on user feedback.