How do I sync Converse forms into Vantage?

1. Overview

Converse forms (built using the form builder) can be synced into Vantage as an internal data source. This lets you build dashboards, run AI queries, and set up alerts over your form submission data — bringing field-collected data directly into analytics.

When a form is added as a Vantage source, its submitted data is written to ClickHouse. The sync can be triggered manually by an admin, and will include all current submissions.

2. When to Use

- When you have a Converse form collecting store visits, audits, surveys, or any field data.
- When you want to visualise form responses on dashboards with KPI cards, charts, and tables.
- When you want to ask AI questions over form data (e.g., "Which stores had the lowest audit scores last week?").
- When you plan to set up instant alerts or exception alerts based on form submissions.

3. Concepts

- **Add to Analytics** – The action that registers a Converse form as a Vantage internal source. Until a form is added to analytics, its data exists only in the form builder database and is not available for Vantage dashboards or AI.
- **Sync / Resync** – The process that reads form submissions and writes them into ClickHouse. An initial sync happens when the form is first added. Subsequent resyncs are triggered manually to pick up new submissions.
- **User Enrichment** – Vantage automatically joins submitter information (name, email, role, region, manager — from user profile attributes) onto each submission row. This enrichment refreshes on a daily cycle.
- **Form Columns** – Each form question becomes a column in the Vantage source, plus system columns like submission date, submitter ID, and enriched user attributes.

4. Set Up Guide

Step 1: Open Sources

1. In Vantage, click **Sources** from the navigation.
2. Click **Add Source**.

Step 2: Select Connector Type

1. Select **Internal (Converse Form)** as the connector type.

Step 3: Choose the Form

1. Select the form you want to bring into Vantage from the list of available forms.

Step 4: Sync

1. Vantage syncs the form's submission data into ClickHouse.
2. The initial sync may take a moment depending on the volume of existing submissions.

Step 5: Verify

1. Check the row count in the Sources listing.
2. Browse the data to confirm columns and values look correct.
3. Verify that enriched user columns (name, region, manager, etc.) are populated.

5. Best Practices

- Add a form to analytics early — even before submissions start flowing — so the source is ready when you build dashboards.
- Resync before important reviews or presentations to ensure you have the latest data.
- User attribute enrichment (manager, region, etc.) refreshes daily. If you just updated user profiles, the change may not reflect in Vantage until the next day.
- If you modify the form structure (adding or removing questions), resync the source so the ClickHouse schema picks up the new columns.

6. Related Links / FAQs

Does Vantage sync form data automatically?
Currently, form data syncs when you trigger it manually (initial add or resync). Automatic periodic sync is planned.

Can I use alerts on a form that hasn't been added to analytics?
Instant alerts (on-submit notifications) work on any form. Exception alerts that query the ClickHouse table require the form to be added to analytics first.

What columns appear in the Vantage source?
Each form question becomes a column, plus system columns like submission date, submitter ID, and enriched user attributes (name, email, region, manager, etc.).

I added a new question to my form but it doesn't appear in Vantage. What do I do?
Resync the source. New form questions only appear as ClickHouse columns after a resync.

Can I add the same form as a source more than once?
No. Each form maps to one source in Vantage.

7. Version Notes

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