



ActionForms Configuration
for Administrators

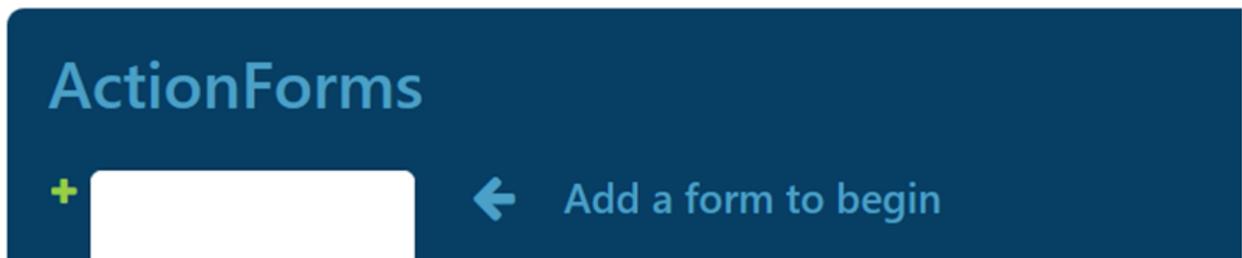
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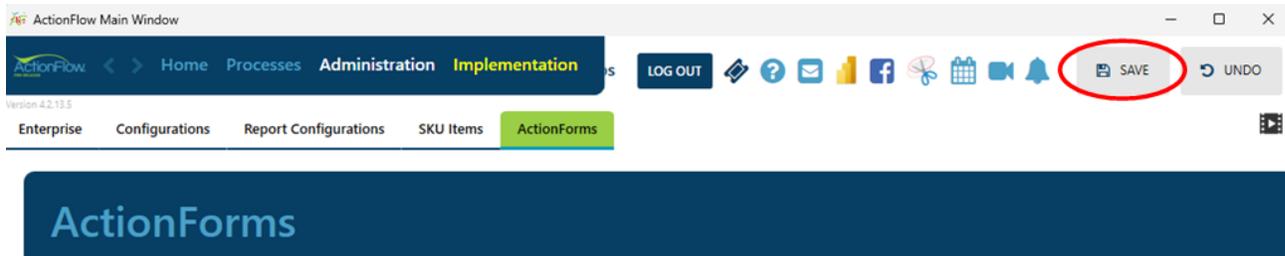
Accessing the ActionForms Tab in the Desktop App

The **ActionForms Tab**, found within the **Administration** section, allows users to create custom forms which team members can access through the **ActionForms App**. Administrators can create a variety of forms including Customer Intake Forms, Template and Install Checklists, Waivers, and Surveys, among others.

1. Go to the **Administration** Tab.
2. Click on **ActionForms**.



Note that any changes made to the **ActionForms Tab** must be saved by clicking the **Save** button located at the upper right-hand corner of the page.



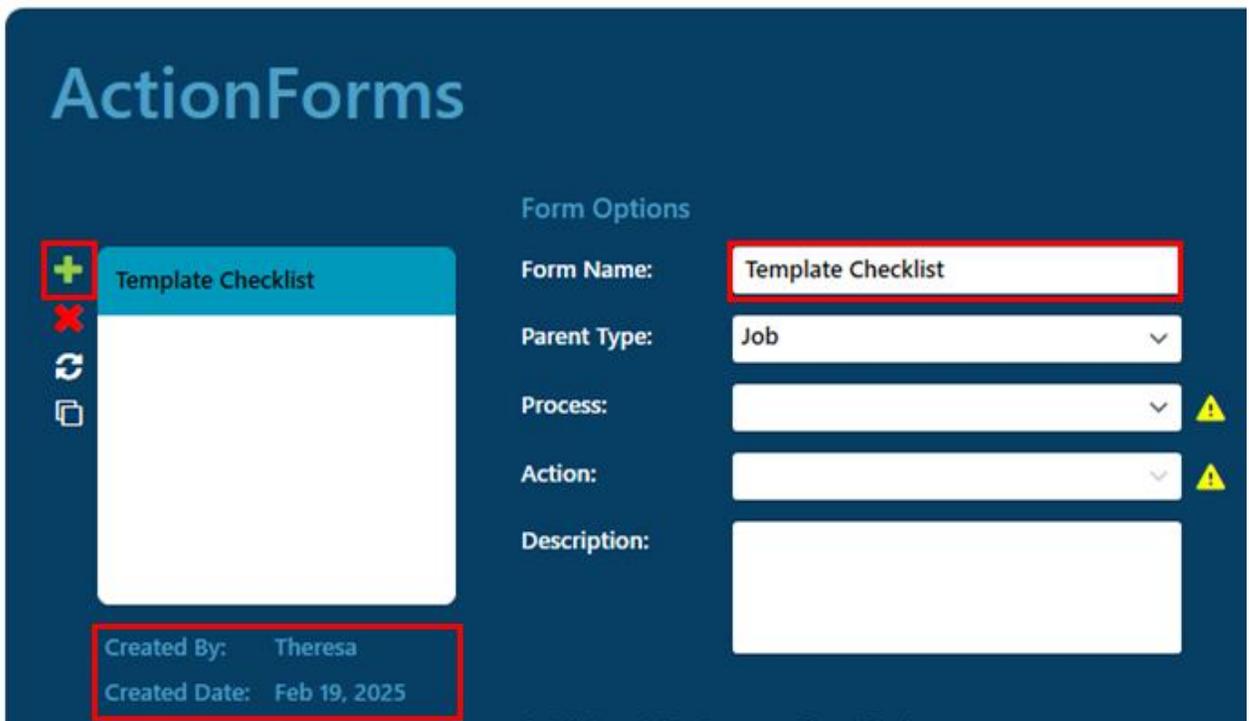
Getting Started with ActionForms in the Desktop App

In this section, we will explore the key elements of managing forms, including creating, deleting, and duplicating forms.

Creating and Naming a Form

Within ActionFlow, Administrators can create and store multiple forms.

1. Click on the **Green +** button on the left to start your form.
2. Under the **Form Options** in the **Form Name** field, enter the desired name of the form.
3. Notice the **Created By** and **Created Date** fields which display the Administrator User's name and creation date of the form.
4. **Save** your changes.

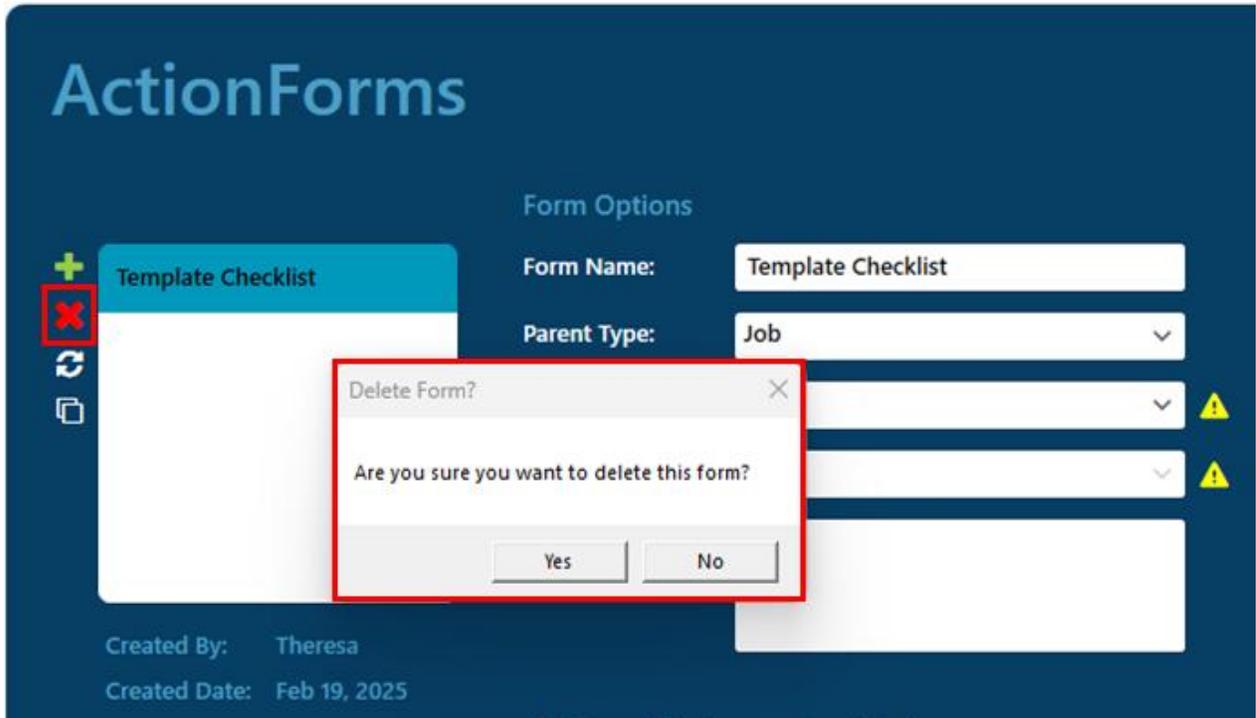


The screenshot displays the ActionForms interface. On the left, a sidebar contains a green plus sign (+) button, a red X button, a refresh icon, and a duplicate icon. The main area shows a form titled "Template Checklist" with a large empty text area. Below the form, the "Created By" field is populated with "Theresa" and the "Created Date" field is populated with "Feb 19, 2025". On the right, the "Form Options" section includes a "Form Name" field with "Template Checklist", a "Parent Type" dropdown menu set to "Job", a "Process" dropdown menu, an "Action" dropdown menu, and a "Description" text area. Two yellow warning icons are visible next to the "Process" and "Action" dropdown menus.

Deleting a Form

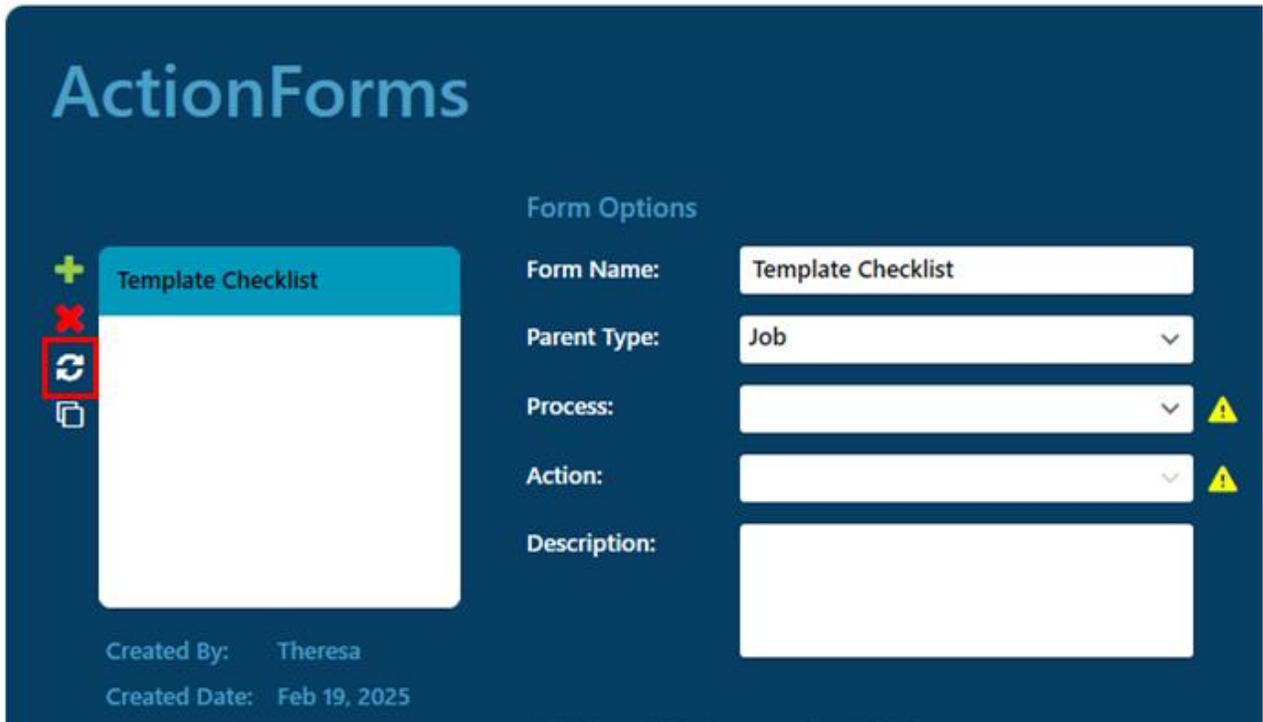
Administrators have the capability to delete forms. If you wish to archive or deactivate a form rather than deleting it entirely, [refer to this section of this guide](#).

1. Click on the **Red X** button on the left to delete your form.
2. A pop-up box will appear asking if you are sure you want to delete the form. Click **Yes** to delete the form.



Refreshing Forms

To ensure you are viewing the most up-to-date edits made by multiple Administrators working on forms simultaneously, it is essential to periodically refresh the list. Simply click on the **White Refresh** button to update the list and see the latest changes.

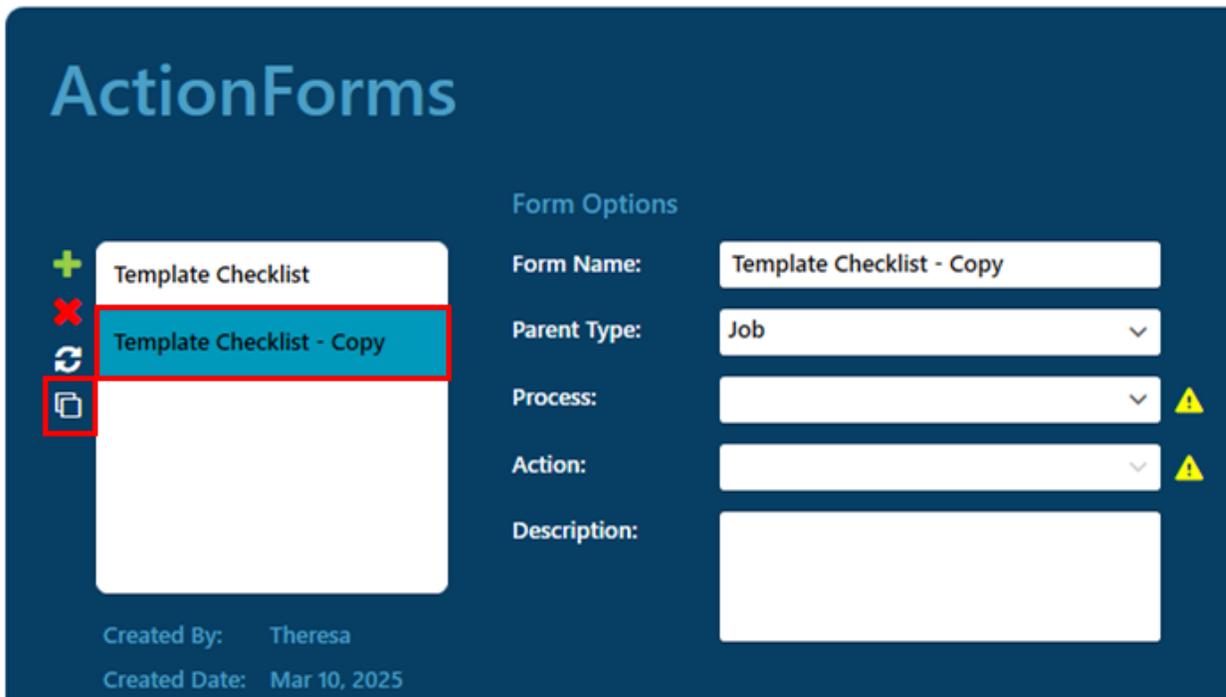


The screenshot displays the 'ActionForms' interface. On the left, a card titled 'Template Checklist' is shown. To its left are three icons: a green plus sign, a red 'X', and a white refresh icon (two circular arrows) which is highlighted with a red square. Below the card, it says 'Created By: Theresa' and 'Created Date: Feb 19, 2025'. On the right, the 'Form Options' section includes: 'Form Name: Template Checklist', 'Parent Type: Job' (with a dropdown arrow), 'Process: [empty]' (with a dropdown arrow and a yellow warning triangle), 'Action: [empty]' (with a dropdown arrow and a yellow warning triangle), and 'Description: [empty text area]'.

Copying a Form

If you'd like to duplicate a form instead of creating a new one from scratch, this can be accomplished using the **Copy** button.

1. Select the **Form** you wish to copy.
2. Click on the **White Duplicate** button on the left to create a copy of your form.
3. A new form will instantly be generated with the name of the form original form followed by – **Copy**.
4. Remember to **Rename** your duplicated form.
5. **Save** your changes.



The screenshot shows the ActionForms interface. On the left, a list of forms is displayed. The first form is 'Template Checklist' and the second is 'Template Checklist - Copy'. The 'Template Checklist - Copy' form is highlighted with a red box. To the left of the list are icons for adding (+), deleting (x), refreshing (circular arrow), and copying (document with plus sign). The 'Copy' icon is also highlighted with a red box. On the right, the 'Form Options' section is visible, showing the following fields:

- Form Name: Template Checklist - Copy
- Parent Type: Job
- Process: (empty dropdown)
- Action: (empty dropdown)
- Description: (empty text area)

At the bottom left, the form details are shown: Created By: Theresa, Created Date: Mar 10, 2025. There are yellow warning icons next to the Process and Action dropdowns.

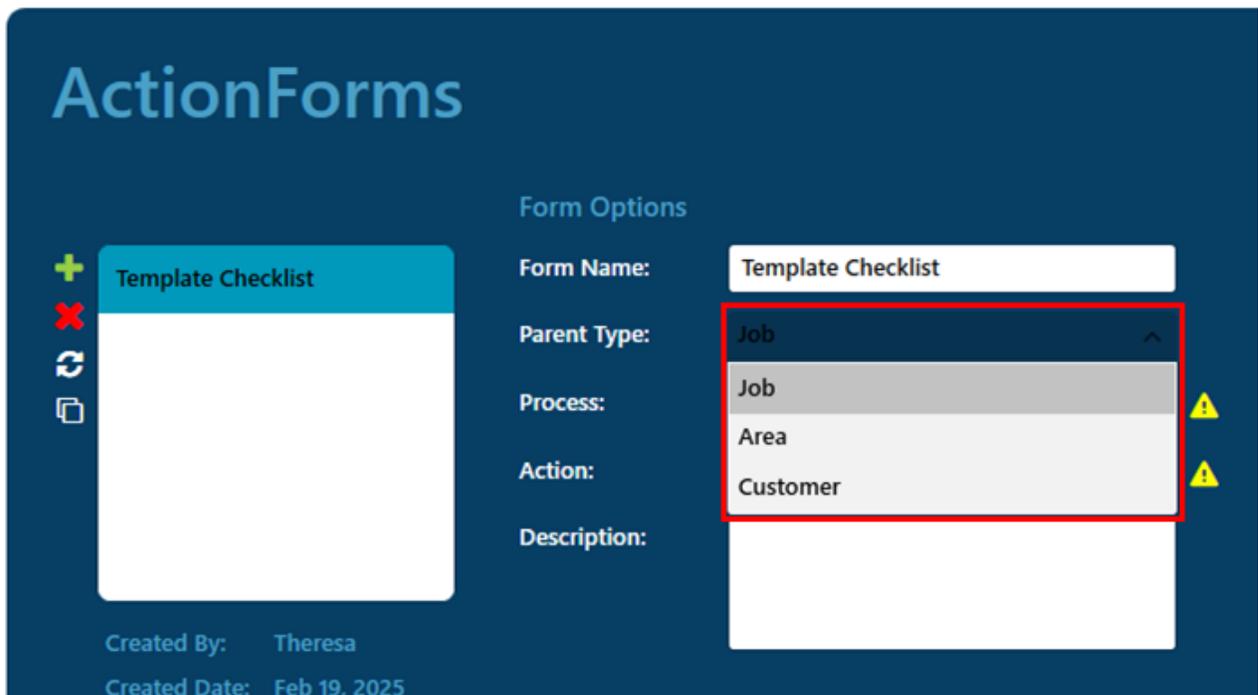
Selecting the Form Parent Type

The **Parent Type** serves as the primary source of information for the form. Administrators can select from **Customer**, **Job** and **Area** fields within ActionForms.

- **Customer:** Ideal for creating a Customer Intake Form.
- **Job:** Perfect for Template/Install Checklists or Waivers.
- **Area:** Optimal for capturing or sharing more detailed information about specific project areas, such as material, color or edge detail.

Customization of fields within each Parent Type can be done through the Configurations tab. [For further guidance on configuring the various Parent Types, refer to this section of our Knowledge Base.](#)

1. Locate the **Parent Type** field and click on the dropdown arrow to display the available options.
2. Choose the **Parent Type** that best suits your form's requirements.
3. **Save** your changes.

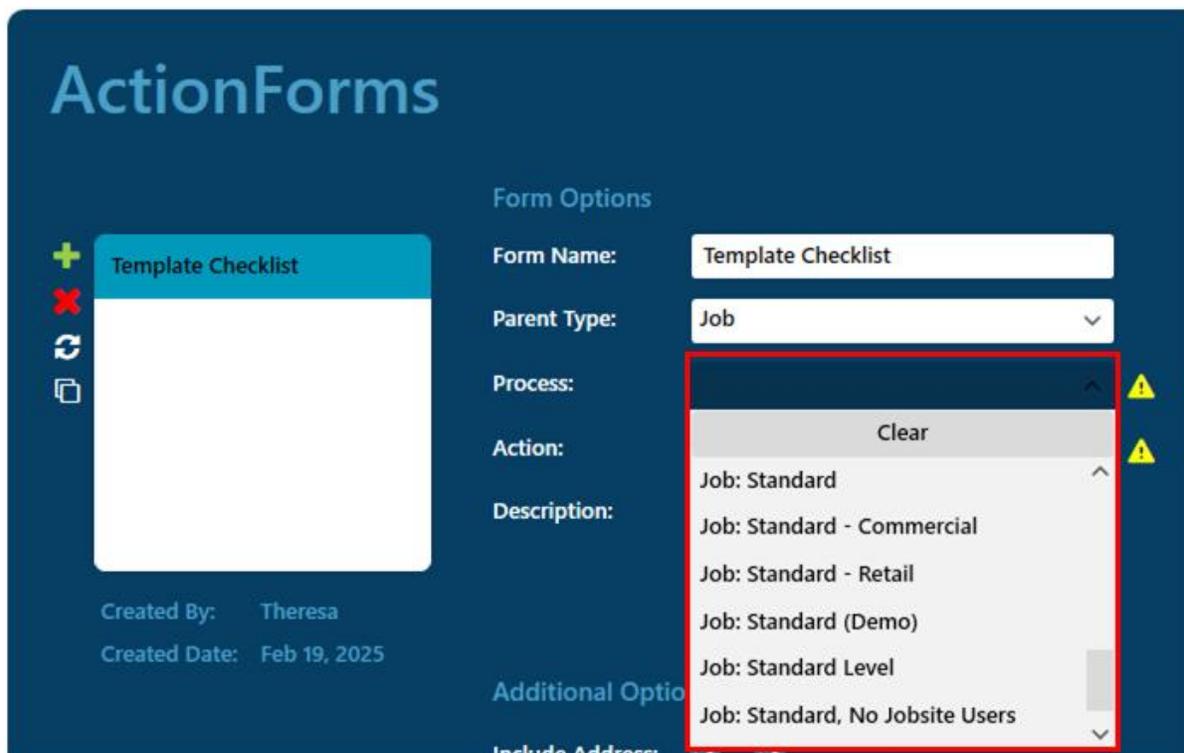


The screenshot displays the 'ActionForms' configuration interface. On the left, a card titled 'Template Checklist' is shown with icons for adding, deleting, refreshing, and copying. Below the card, it indicates 'Created By: Theresa' and 'Created Date: Feb 19, 2025'. On the right, the 'Form Options' section includes fields for 'Form Name' (Template Checklist), 'Parent Type', 'Process', 'Action', and 'Description'. The 'Parent Type' dropdown menu is open, showing three options: 'Job', 'Area', and 'Customer'. The 'Job' option is highlighted, and a red box is drawn around the entire dropdown menu. Two yellow warning icons are visible to the right of the dropdown menu.

Linking a Process to the Form

Administrators must link a **Process** to the form, enabling the form to populate within the **Tablet App** only when it corresponds to a specific **Process**. For example, if there are separate processes for residential and commercial jobs, distinct forms can be set to populate based on the relevant process. If you wish to use the same form or a similar form for a different process, the recommended method is to [duplicate the form](#) and adjust the process accordingly. It is essential to create a process first. [More information on creating and configuring processes can be found in this section of our Knowledge Base.](#)

1. Navigate to the **Process** field and click the dropdown arrow to view the list.
2. Select the desired **Process**.
3. **Save** your changes.

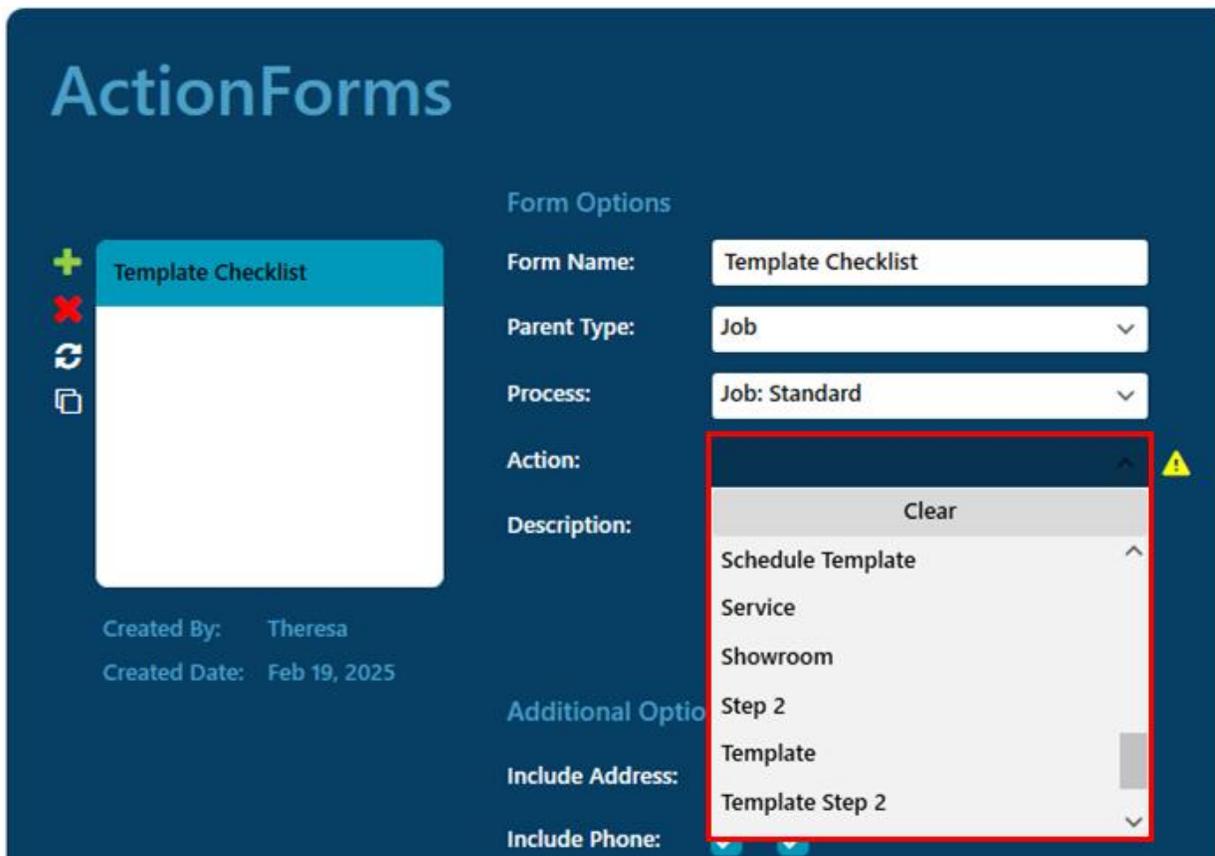


The screenshot displays the 'ActionForms' configuration interface. On the left, a card titled 'Template Checklist' is shown with a plus sign, a red X, a refresh icon, and a copy icon. Below the card, it indicates 'Created By: Theresa' and 'Created Date: Feb 19, 2025'. On the right, the 'Form Options' section includes fields for 'Form Name' (Template Checklist), 'Parent Type' (Job), 'Process' (with a dropdown menu open), 'Action', and 'Description'. The 'Process' dropdown menu is highlighted with a red box and contains the following options: 'Clear', 'Job: Standard', 'Job: Standard - Commercial', 'Job: Standard - Retail', 'Job: Standard (Demo)', 'Job: Standard Level', and 'Job: Standard, No Jobsite Users'. Below the 'Form Options' section, the 'Additional Options' section is partially visible, showing 'Include Address:'. Two yellow warning icons are present on the right side of the 'Process' dropdown menu.

Associating an Action with the Form

After selecting the **Process** for the form, you must link an **Action** to the form as well. This enables the form to be displayed in the **Tablet App** when the job progresses to a designated **Action** stage. For instance, by assigning the **Template Action**, the form will appear only when the **Template** is scheduled for that day when forms are downloaded by **Date**. Downloading by **Job #** will display all forms assigned to the user logged in.

1. Locate the **Action** field and click on the dropdown arrow.
2. Select your desired **Action**.
3. **Save** your changes.

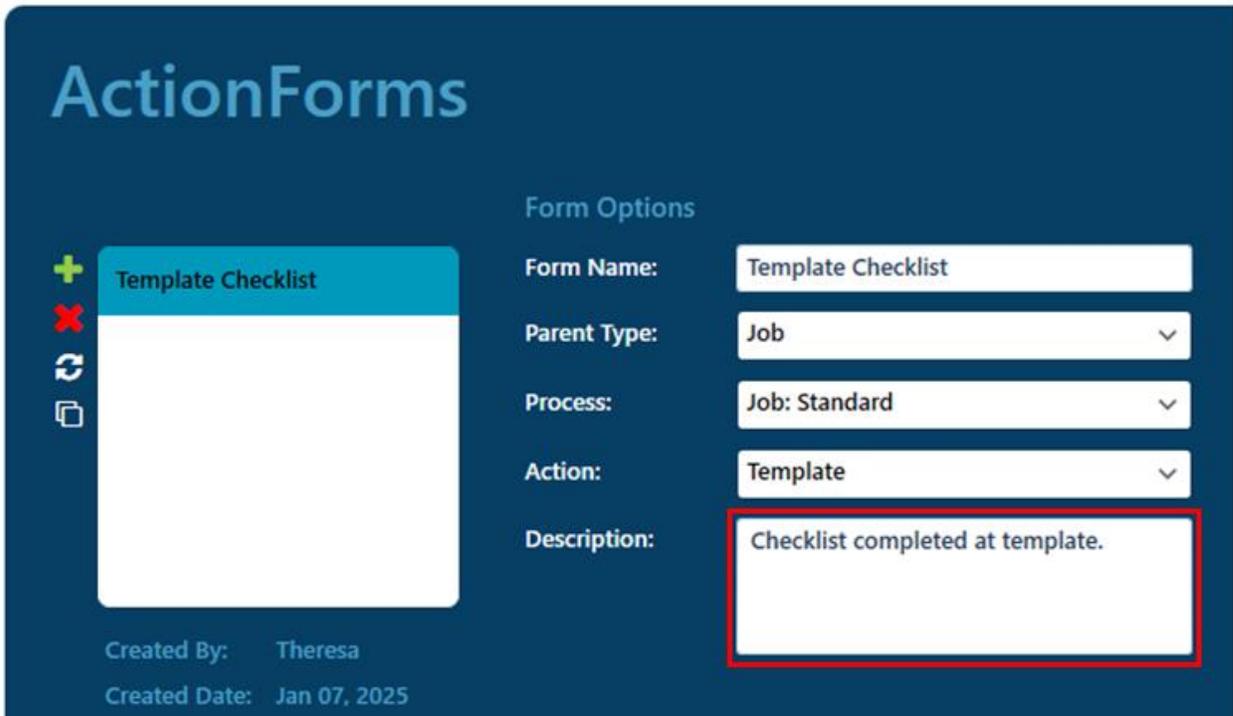


The screenshot shows the 'ActionForms' configuration interface. On the left, there is a card for 'Template Checklist' with a plus icon, a red X icon, a refresh icon, and a copy icon. Below the card, it shows 'Created By: Theresa' and 'Created Date: Feb 19, 2025'. On the right, the 'Form Options' section includes fields for 'Form Name: Template Checklist', 'Parent Type: Job', and 'Process: Job: Standard'. The 'Action:' field is open, showing a dropdown menu with options: 'Clear', 'Schedule Template', 'Service', 'Showroom', 'Step 2', 'Template', and 'Template Step 2'. A yellow warning triangle is visible next to the dropdown. Below the 'Form Options' is the 'Additional Options' section, which includes 'Include Address:' and 'Include Phone:'.

Adding a Description to the Form

The **Description** field provides a space for Administrators to offer more details about the form's intended use. This serves as an internal reference to understand the form's purpose. Although the **Description** does not appear on the form itself, it ensures everyone understands the form's function.

1. Navigate to the **Description** field.
2. Enter additional details about the form, if desired.
3. **Save** your changes.



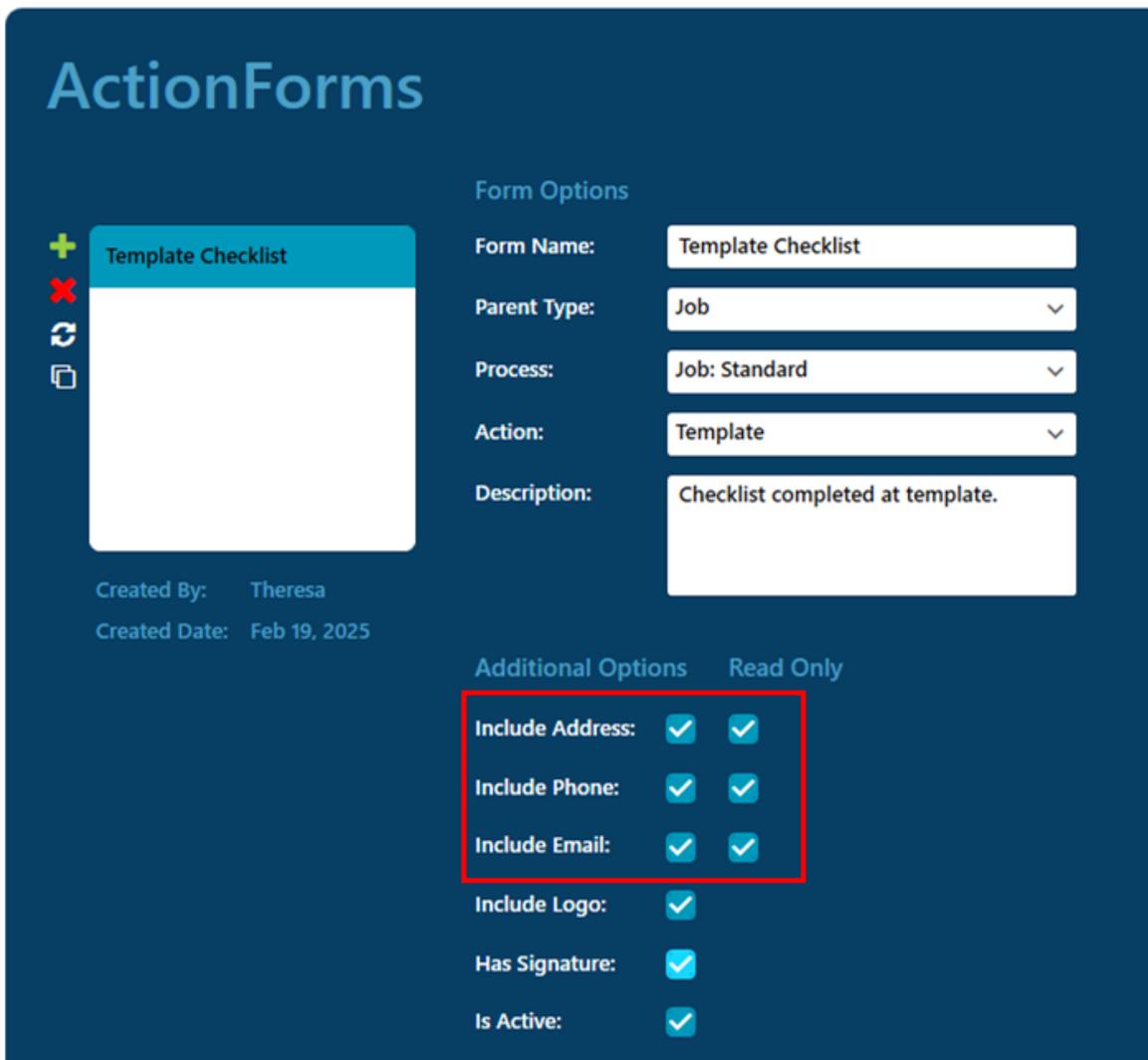
The screenshot displays the 'ActionForms' interface. On the left, a card titled 'Template Checklist' is shown with a blue header and a white body. To the right of the card is the 'Form Options' section, which includes several dropdown menus: 'Form Name' (Template Checklist), 'Parent Type' (Job), 'Process' (Job: Standard), and 'Action' (Template). The 'Description' field is highlighted with a red border and contains the text 'Checklist completed at template.' Below the card, the 'Created By' field is 'Theresa' and the 'Created Date' is 'Jan 07, 2025'.

Including Additional Customer Information on the Form (Address, Phone and Email)

Administrators have the option to include additional details on the form such as **Address**, **Phone**, and **Email**. This information is pulled from the data provided under the **Customer** or **Job** sections. The system prioritizes **Job** information by default but will pull missing details from the **Customer** record if necessary. Administrators can mark these fields as **Read-Only**, if preferred.

If you choose to allow users to edit these fields within the **Tablet App**, any modifications made—such as updating the address—will automatically sync with **ActionFlow**, ensuring that the system is always up to date.

1. Navigate to the **Additional Options** section.
2. Select the **Options** you wish included on your form. If you want these to be **Read-Only**, be sure to check the corresponding box.
3. **Save** your changes.



The screenshot shows the 'ActionForms' configuration interface. On the left, there is a card for 'Template Checklist' with a plus icon, a red X icon, a refresh icon, and a copy icon. Below the card, it says 'Created By: Theresa' and 'Created Date: Feb 19, 2025'. On the right, the 'Form Options' section includes: 'Form Name: Template Checklist', 'Parent Type: Job', 'Process: Job: Standard', 'Action: Template', and 'Description: Checklist completed at template.'. Below this is the 'Additional Options' section with two columns: 'Additional Options' and 'Read Only'. The 'Additional Options' column has 'Include Address:', 'Include Phone:', 'Include Email:', 'Include Logo:', 'Has Signature:', and 'Is Active:'. The 'Read Only' column has checkboxes for 'Include Address:', 'Include Phone:', and 'Include Email:'. A red box highlights the 'Include Address:', 'Include Phone:', and 'Include Email:' rows, showing that all three are checked in both columns.

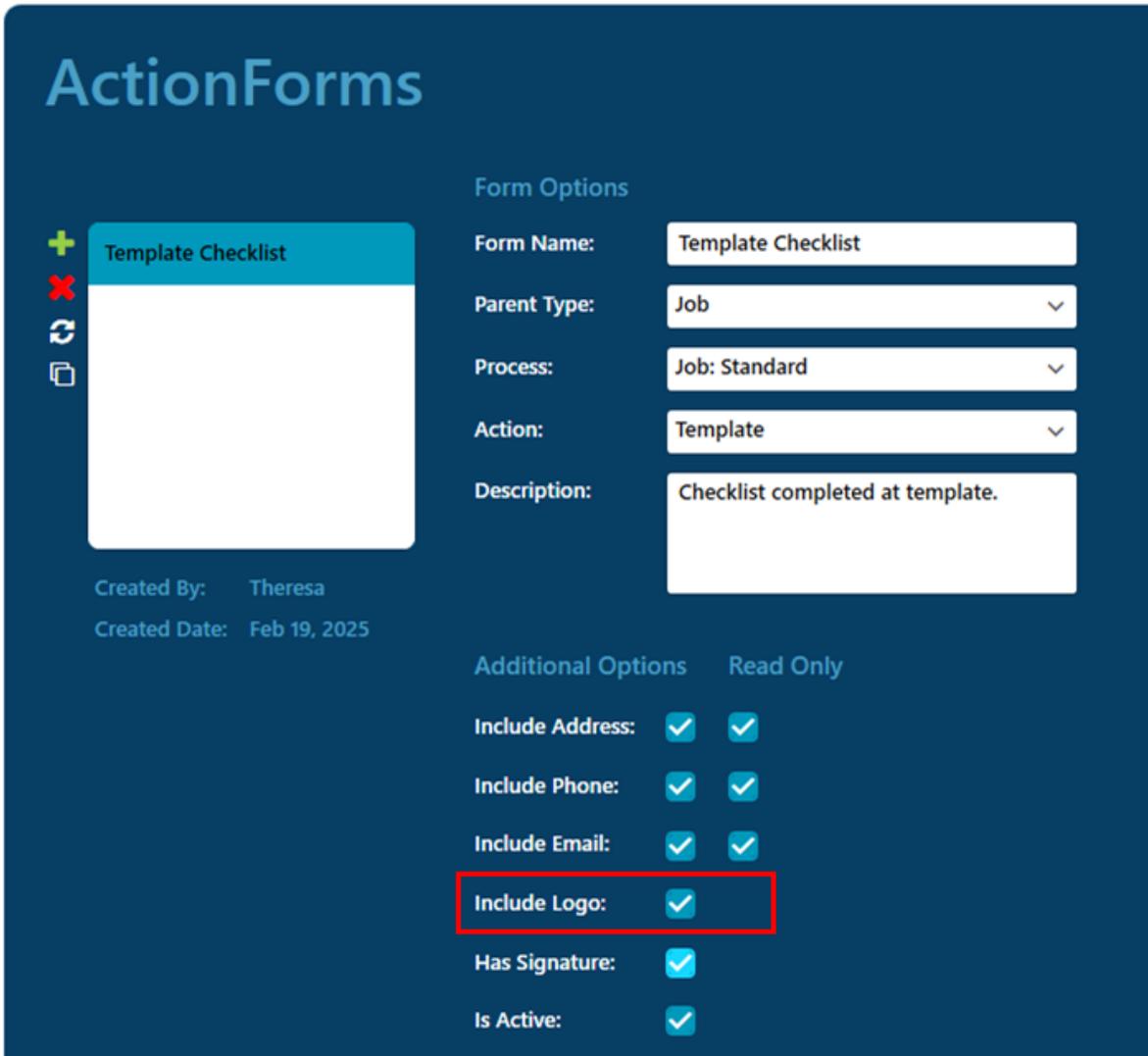
Form Options	
Form Name:	Template Checklist
Parent Type:	Job
Process:	Job: Standard
Action:	Template
Description:	Checklist completed at template.

Additional Options	
Additional Options	Read Only
Include Address:	<input checked="" type="checkbox"/>
Include Phone:	<input checked="" type="checkbox"/>
Include Email:	<input checked="" type="checkbox"/>
Include Logo:	<input checked="" type="checkbox"/>
Has Signature:	<input checked="" type="checkbox"/>
Is Active:	<input checked="" type="checkbox"/>

Adding Your Logo to the Form

If desired, you can include your **Logo** on your form.

1. Find the **Include Logo** field under **Additional Options**.
2. Check the box to include your **Logo** on the form.
3. **Save** your changes.



The screenshot shows the configuration page for a form named 'Template Checklist'. The interface is dark blue with white text and form elements. On the left, there is a sidebar with a list of forms, including 'Template Checklist', and icons for adding, deleting, refreshing, and copying. The main area is divided into 'Form Options' and 'Additional Options'.

Form Options

- Form Name: Template Checklist
- Parent Type: Job
- Process: Job: Standard
- Action: Template
- Description: Checklist completed at template.

Created By: Theresa
Created Date: Feb 19, 2025

Additional Options **Read Only**

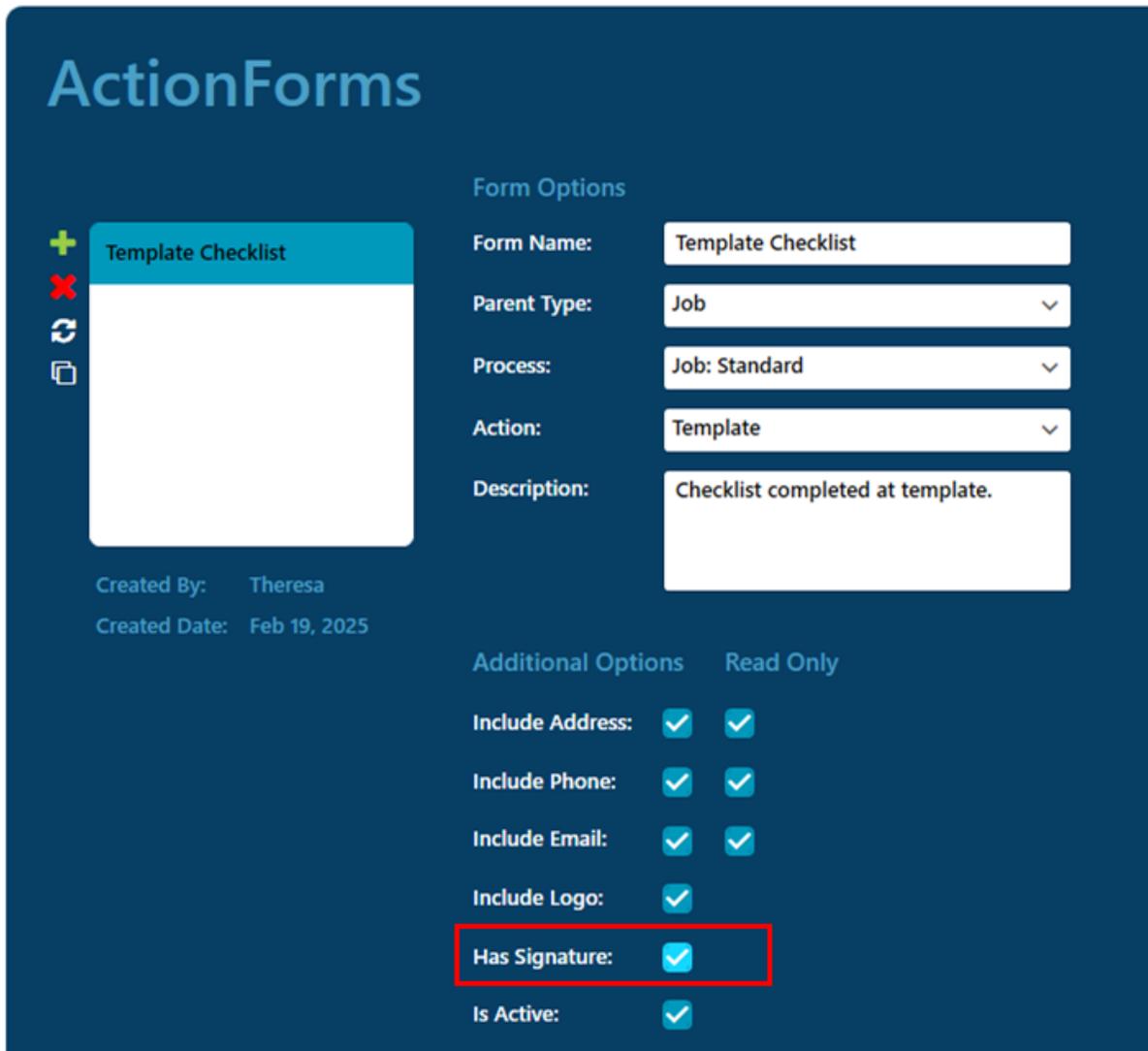
Include Address:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Include Phone:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Include Email:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Include Logo:	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Has Signature:	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Is Active:	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The 'Include Logo' checkbox is highlighted with a red border.

Collecting a Signature on the Form

Within ActionForms, you can gather signatures from customers or team members by enabling the **Has Signature** option. Administrators can easily customize each form to include a signature box. It is important to note that the signatures captured in ActionForms are form-specific and do not require the setup of [E-Signatures in ActionFlow](#).

1. Find the **Has Signature** field under **Additional Options**.
2. Check the box to require a signature on the form.
3. **Save** your changes.



The screenshot shows the configuration page for an ActionForm titled "Template Checklist". On the left, there is a sidebar with a plus sign, a red X, a refresh icon, and a document icon. The main content area is divided into several sections:

- Form Options:** Contains fields for Form Name (Template Checklist), Parent Type (Job), Process (Job: Standard), Action (Template), and Description (Checklist completed at template).
- Additional Options:** A table of checkboxes for various form features.
- Read Only:** A column of checkboxes for read-only features.

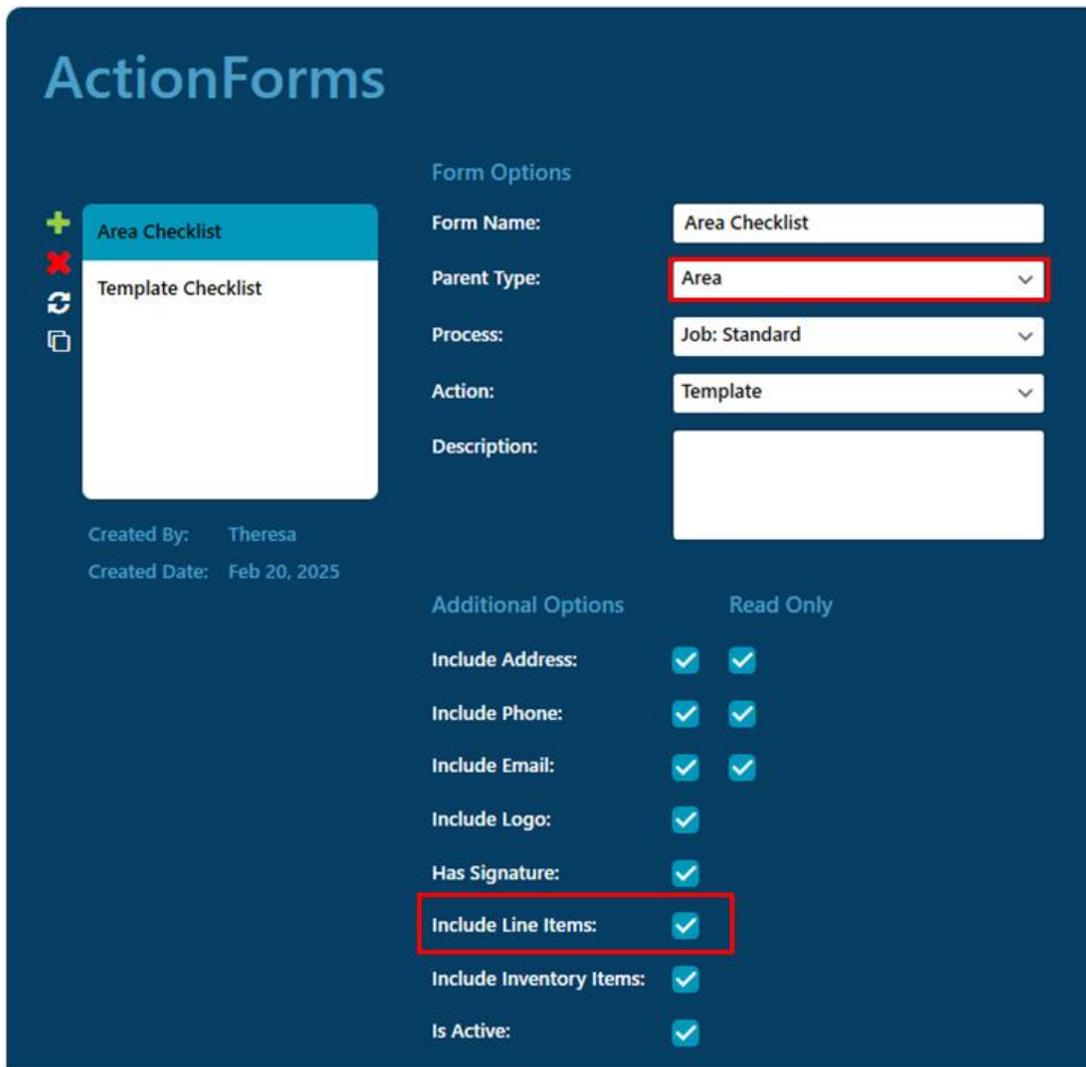
Additional Options	Read Only
Include Address:	<input checked="" type="checkbox"/>
Include Phone:	<input checked="" type="checkbox"/>
Include Email:	<input checked="" type="checkbox"/>
Include Logo:	<input checked="" type="checkbox"/>
Has Signature:	<input checked="" type="checkbox"/>
Is Active:	<input checked="" type="checkbox"/>

Below the form options, the form is created by Theresa on Feb 19, 2025.

Including Line Items on the Area Form

When choosing the **Area Parent Type**, you have the option to include **Area Line Items** on your form. By enabling this feature, all **Line Items** linked to the specified **Area** will be displayed.

1. Select the **Area Parent Type**.
2. Locate the **Include Line Items** field under **Additional Options**.
3. Check the box to display **Line Items** on the form.
4. **Save** your changes.



The screenshot displays the 'ActionForms' configuration interface. On the left, a sidebar shows a list of forms: 'Area Checklist' (selected with a green plus icon) and 'Template Checklist' (with a red X icon). Below the list, it indicates 'Created By: Theresa' and 'Created Date: Feb 20, 2025'. The main area is titled 'Form Options' and contains the following fields:

- Form Name:** Area Checklist
- Parent Type:** Area (highlighted with a red box)
- Process:** Job: Standard
- Action:** Template
- Description:** (empty text area)

Below the form options, there are two columns of checkboxes:

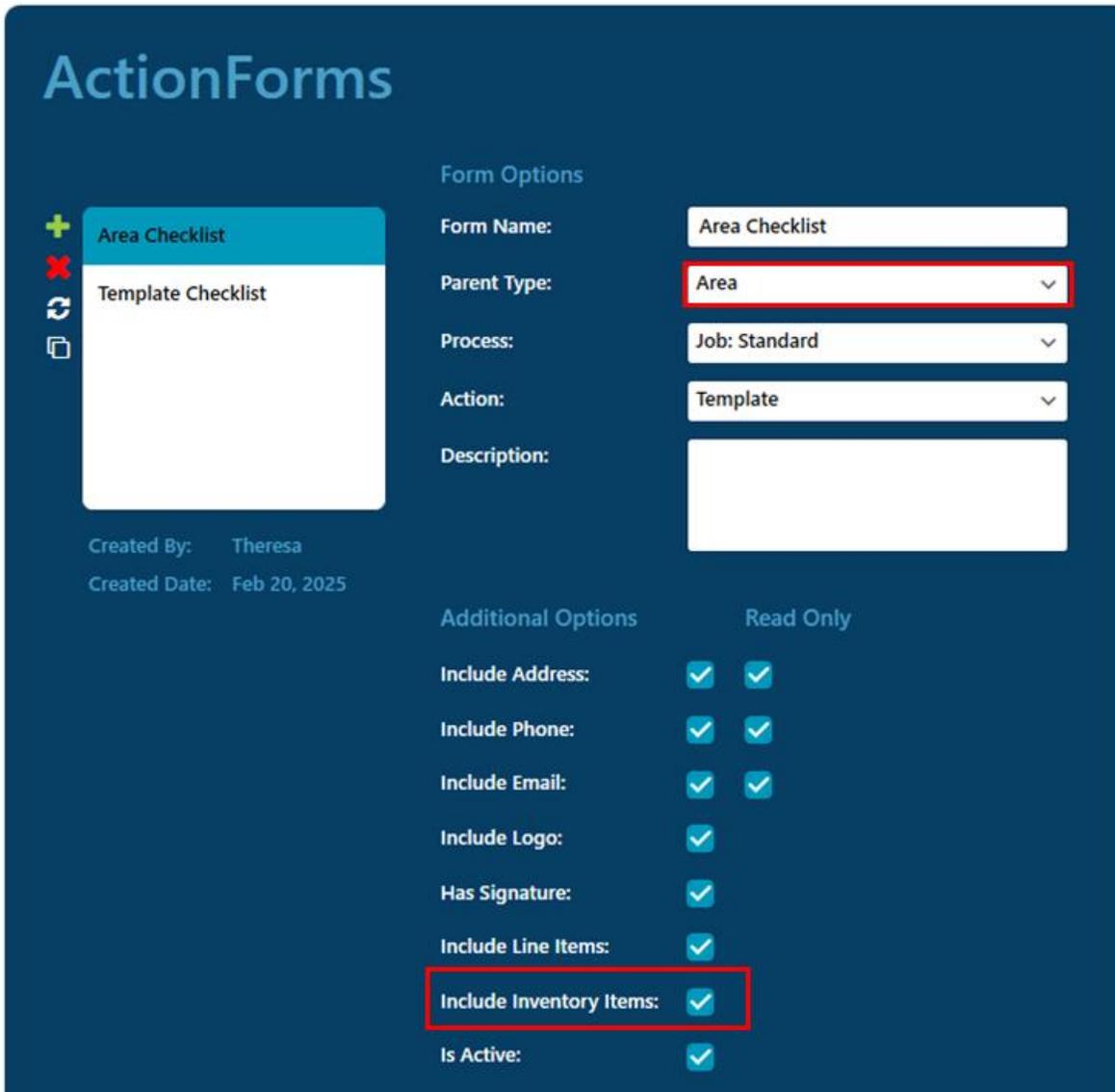
Additional Options	Read Only
Include Address:	<input checked="" type="checkbox"/>
Include Phone:	<input checked="" type="checkbox"/>
Include Email:	<input checked="" type="checkbox"/>
Include Logo:	<input checked="" type="checkbox"/>
Has Signature:	<input checked="" type="checkbox"/>
Include Line Items:	<input checked="" type="checkbox"/>
Include Inventory Items:	<input checked="" type="checkbox"/>
Is Active:	<input checked="" type="checkbox"/>

The 'Include Line Items' checkbox is highlighted with a red box.

Adding Inventory Items on the Area Form

When configuring the **Area Parent Type**, you can include **Inventory Items** on the form. Enabling this feature ensures that all **Inventory Items** linked to the specified **Area** will be visible on the form.

1. Select the **Area Parent Type**.
2. Locate the **Include Inventory Items** field under **Additional Options**.
3. Check the box to display **Inventory Items** on the form.
4. **Save** your changes.



The screenshot displays the 'ActionForms' configuration interface. On the left, a sidebar shows a list of forms: 'Area Checklist' (selected with a green plus icon) and 'Template Checklist' (with a red minus icon). Below the list, it indicates 'Created By: Theresa' and 'Created Date: Feb 20, 2025'. The main configuration area is divided into two sections: 'Form Options' and 'Additional Options'.

Form Options:

- Form Name: Area Checklist
- Parent Type: Area (highlighted with a red box)
- Process: Job: Standard
- Action: Template
- Description: (empty text area)

Additional Options:

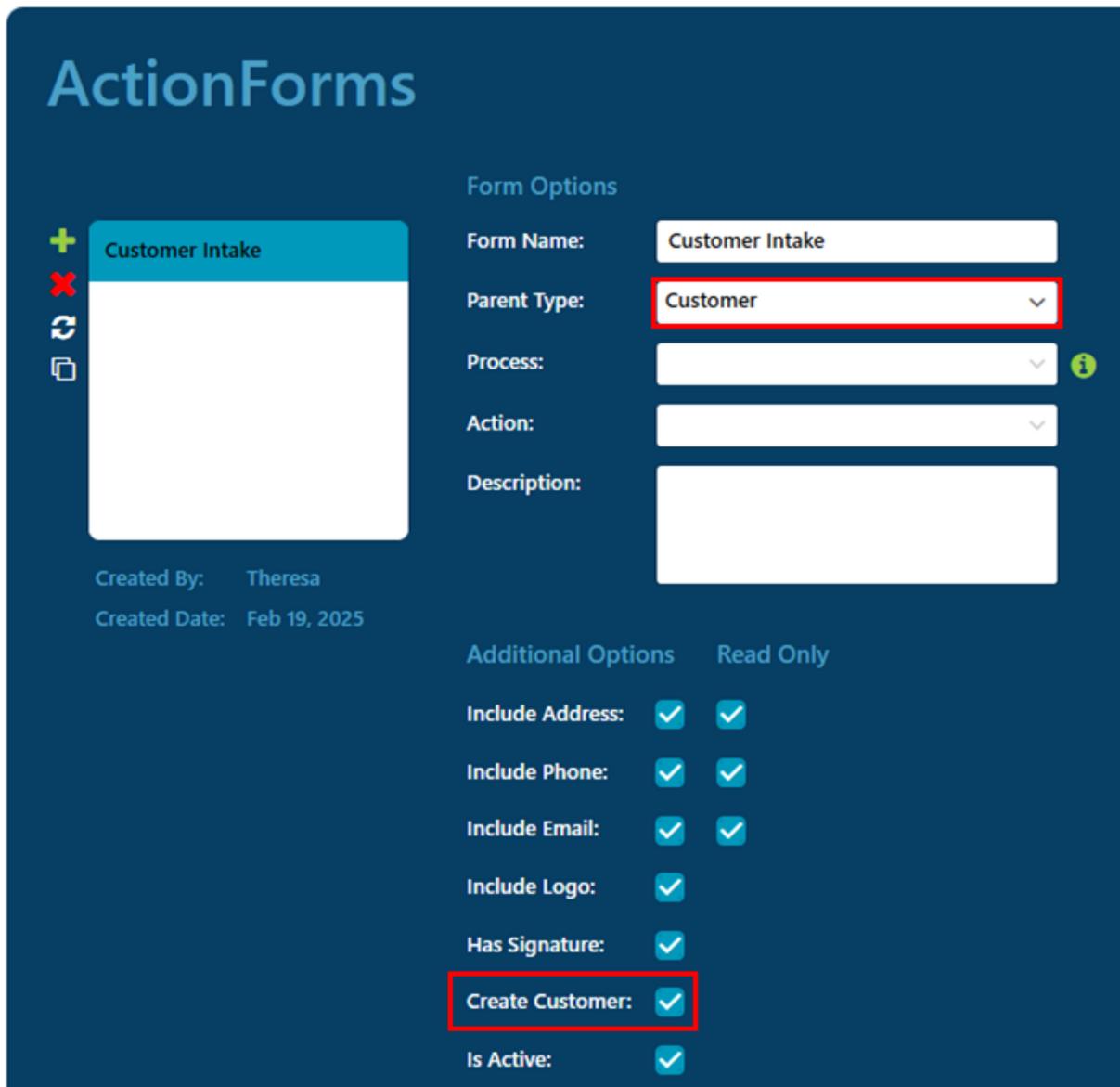
		Read Only
Include Address:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Include Phone:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Include Email:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Include Logo:	<input checked="" type="checkbox"/>	
Has Signature:	<input checked="" type="checkbox"/>	
Include Line Items:	<input checked="" type="checkbox"/>	
Include Inventory Items:	<input checked="" type="checkbox"/>	
Is Active:	<input checked="" type="checkbox"/>	

The 'Include Inventory Items' checkbox is highlighted with a red box.

Creating a Customer Record with a Form

To create a **Customer Record** within ActionFlow through a form, you must enable the **Create Customer** property. This feature ensures that when a new customer is added through the **Tablet App**, it will also be reflected in ActionFlow. This functionality is particularly useful for a Customer Intake form, providing users with an easy way to add new customers to the system.

1. Ensure the **Parent Type** is set to **Customer**.
2. Navigate to the **Create Customer** field under **Additional Options**.
3. **Check the box** to enable the creation of a customer with this form. **NOTE:** Only one form in your account can have the **Create Customer** box enabled.
4. **Save** your changes.



ActionForms

+ Customer Intake

x

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📄

Created By: Theresa

Created Date: Feb 19, 2025

Form Options

Form Name:

Parent Type: Customer ▼

Process: ⓘ

Action:

Description:

Additional Options

Include Address:

Include Phone:

Include Email:

Include Logo:

Has Signature:

Create Customer:

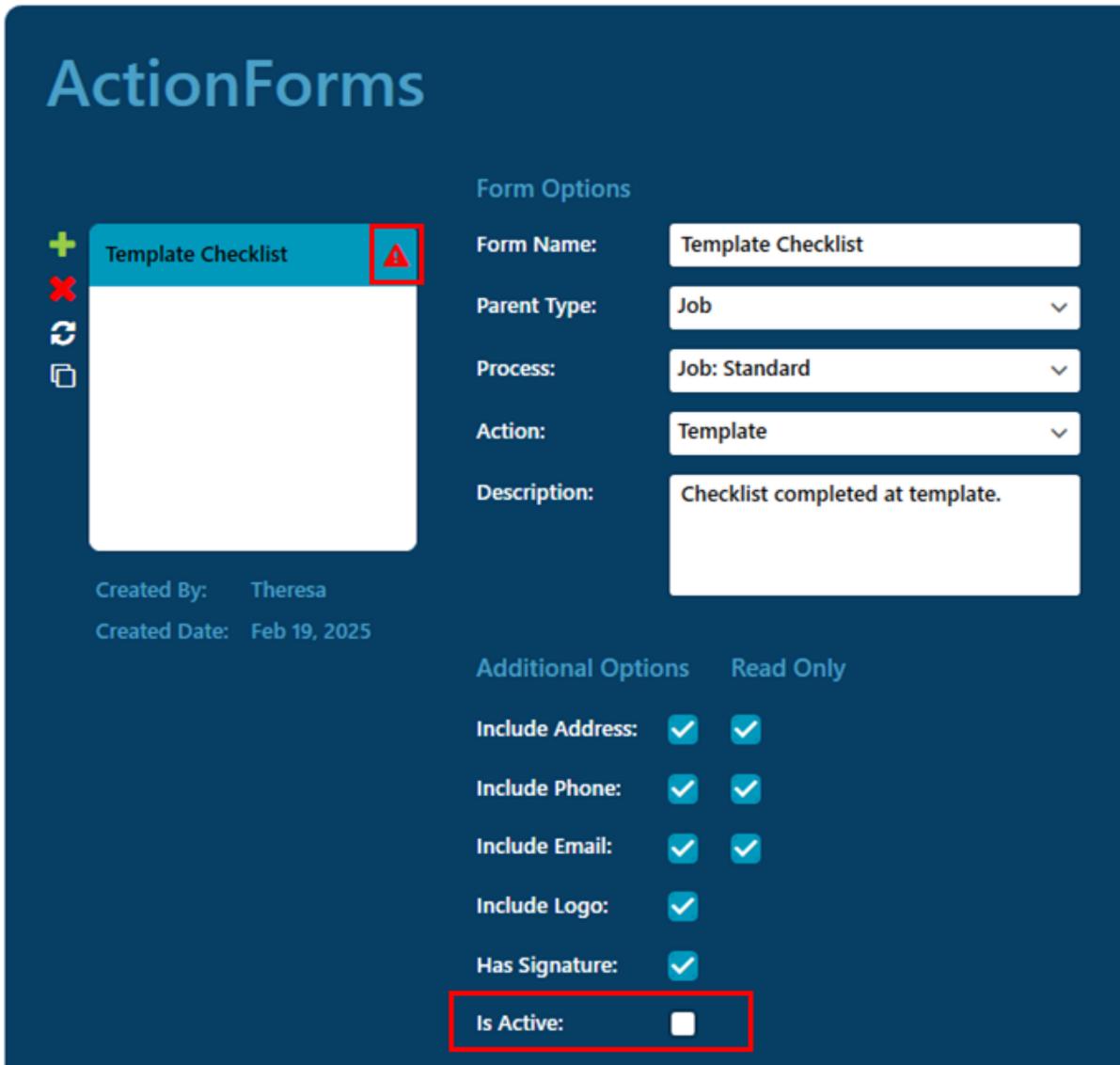
Is Active:

Read Only

Deactivating a Form

There may be instances where archiving a form may be preferable to deleting it. Archiving allows you the flexibility to revert to a previous form or modify it later. To archive or deactivate a form, you will need to disable the **Is Active** property.

1. Locate the **Is Active** field under **Additional Options**.
2. **Deselect** the checkbox to deactivate the form. Upon doing so, a red triangle with an exclamation point will appear next to the form's name, indicating its inactive status.
3. **Save** your changes.



ActionForms

Form Options

Form Name:

Parent Type:

Process:

Action:

Description:

Created By: Theresa
Created Date: Feb 19, 2025

Additional Options **Read Only**

Include Address:

Include Phone:

Include Email:

Include Logo:

Has Signature:

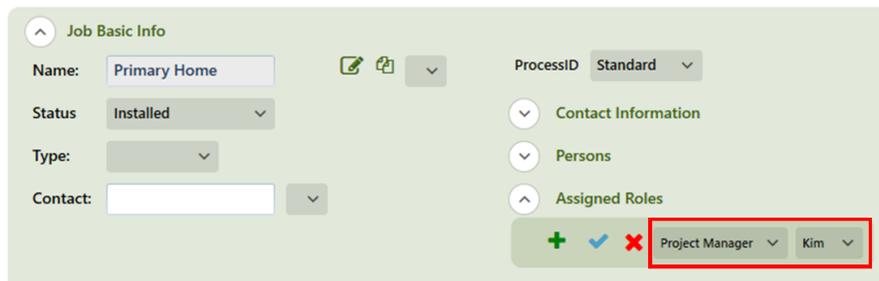
Is Active:

Setting Up Notifications for Completed Forms

To ensure that Desktop Users are promptly informed when a form is completed and uploaded into ActionFlow, Administrators can configure notifications using the **Notification Settings** property.

Before setting this up, you must configure **Roles** and **Actions** within the system. For a detailed walkthrough on setting up user **Roles**, [please refer to this section in our Knowledge Base](#). To establish **Actions**, [visit this area of our Knowledge Base](#). To see how this appears in **ActionFlow**, [refer to this part of the guide](#).

1. Locate the **Role** field within **Notification Setting**.
2. Choose the appropriate **Role** to receive notifications upon form completion. Failure to select a **Role** will result in the **Notification** going to the user who completed the form. **NOTE:** When attaching a **Role**, it is important to ensure that a **User** is associated with the selected **Role** in each job.



Job Basic Info

Name: Primary Home

Status: Installed

Type:

Contact:

ProcessID: Standard

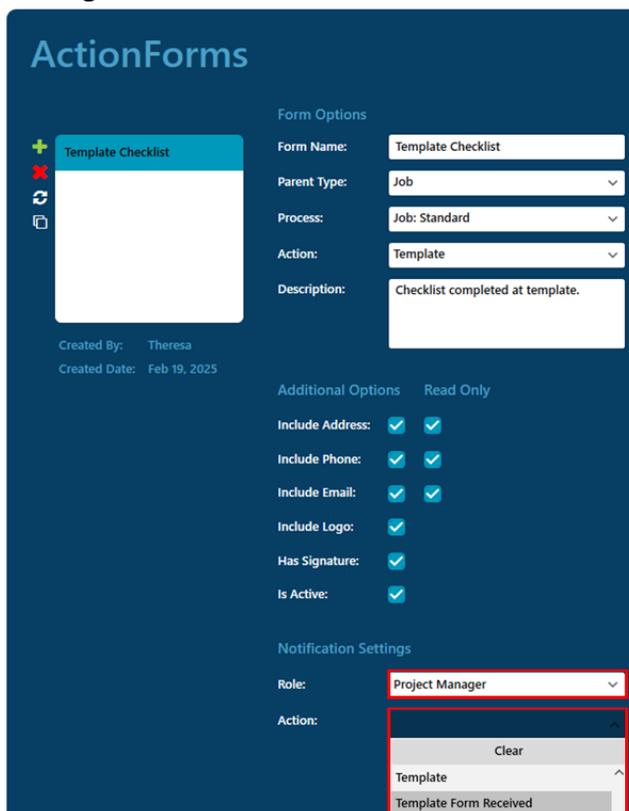
Contact Information

Persons

Assigned Roles

Project Manager Kim

3. If desired, select the preferred **Action** for your notification. If no action is defined, the system will default to adding a **Comment** stating, "A form has been received."
4. **Save** your changes.



ActionForms

Form Options

Form Name: Template Checklist

Parent Type: Job

Process: Job: Standard

Action: Template

Description: Checklist completed at template.

Created By: Theresa

Created Date: Feb 19, 2025

Additional Options Read Only

Include Address:

Include Phone:

Include Email:

Include Logo:

Has Signature:

Is Active:

Notification Settings

Role: Project Manager

Action: Clear Template Template Form Received

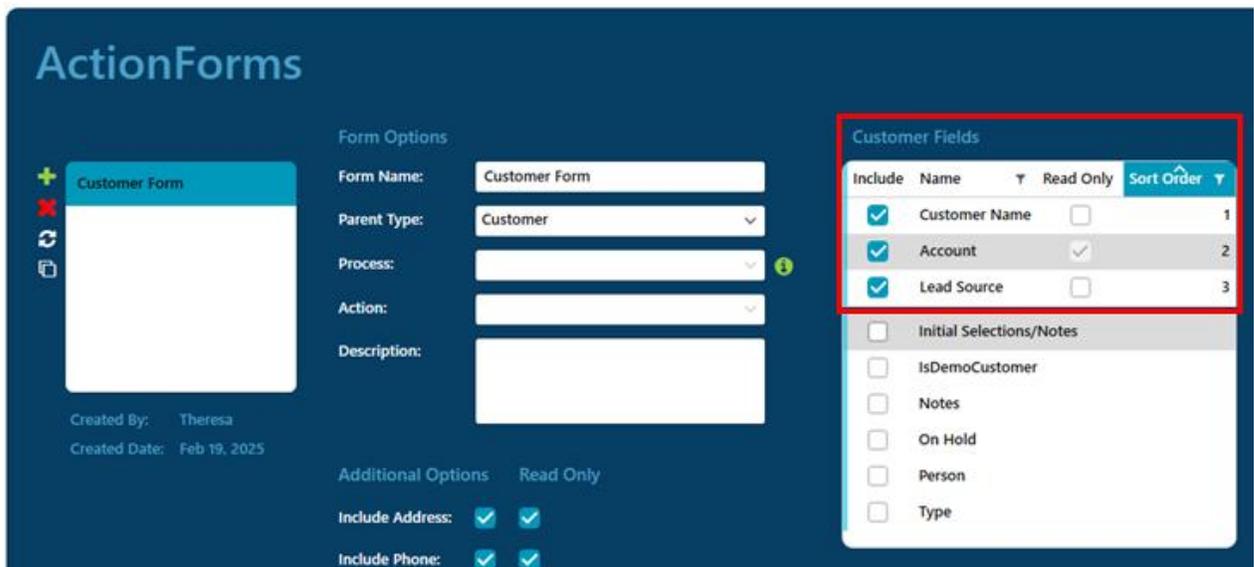
Setting up the Job, Customer and Area Fields to be Included on a Form in the Desktop App

Now that the basic fields of the form have been established, the next task is to customize the **Customer**, **Job**, and **Area** details that you intend to include on the form. This section will provide detailed instructions for setting up each of these areas.

Configuring Customer Fields on a Form

After selecting the **Customer Parent Type**, the list on the right will show all the **Customer Details** Fields. These fields are sourced from the **Customer Configurations** defined in the **Configurations Tab**. For guidance on configuring **Customer Details**, [refer to this section of our Knowledge Base](#).

1. Locate the **Customer Fields** box positioned in the center of the screen.
2. Choose the **Customer Fields** you wish to include on your form by marking the respective **Include** box.
3. Upon selection, the field will move to the top of the list and reveal additional properties – **Read Only** and **Sort Order**.
4. Once all desired fields are included, customize whether the field should be **Read Only**. Enabling **Read Only** restricts edits to the field to users completing the form in the **Tablet App**. A greyed-out **Read Only** box indicates the field has been set as **Read Only** in the **Configurations Tab** or by ActionFlow. **NOTE:** If the **Read Only** option is not enabled, any data entered in these fields on the form will automatically update ActionFlow with the new information.
5. If desired, adjust the **Sort Order** of the fields on your form. **NOTE:** If selected, **Customer Name** will always be placed at the top of the form regardless of where it's placed in the **Sort Order**.
6. **Save** your changes.



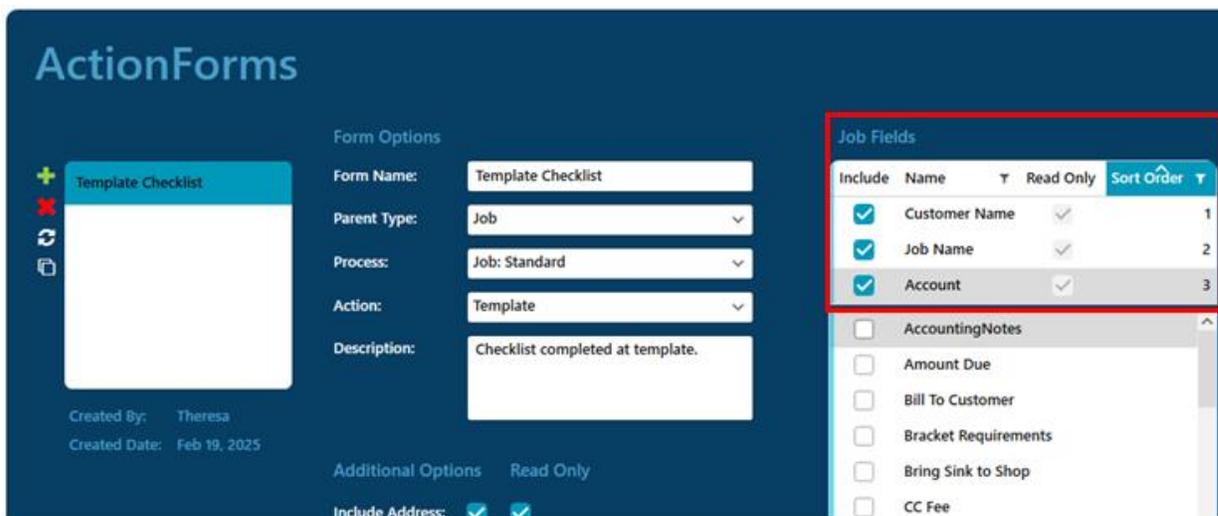
The screenshot shows the ActionForms configuration interface. On the left, there is a sidebar with a 'Customer Form' card. The main area is divided into 'Form Options' and 'Additional Options'. The 'Form Options' section includes fields for 'Form Name' (Customer Form), 'Parent Type' (Customer), 'Process', 'Action', and 'Description'. The 'Additional Options' section has 'Include Address' and 'Include Phone', both with checked boxes. On the right, the 'Customer Fields' panel is highlighted with a red box. It contains a table with columns for 'Include', 'Name', 'Read Only', and 'Sort Order'. The table lists three fields: 'Customer Name' (checked, Read Only unchecked, Sort Order 1), 'Account' (checked, Read Only checked, Sort Order 2), and 'Lead Source' (checked, Read Only unchecked, Sort Order 3). Below the table are several other fields with unchecked boxes: 'Initial Selections/Notes', 'IsDemoCustomer', 'Notes', 'On Hold', 'Person', and 'Type'.

Include	Name	Read Only	Sort Order
<input checked="" type="checkbox"/>	Customer Name	<input type="checkbox"/>	1
<input checked="" type="checkbox"/>	Account	<input checked="" type="checkbox"/>	2
<input checked="" type="checkbox"/>	Lead Source	<input type="checkbox"/>	3
<input type="checkbox"/>	Initial Selections/Notes		
<input type="checkbox"/>	IsDemoCustomer		
<input type="checkbox"/>	Notes		
<input type="checkbox"/>	On Hold		
<input type="checkbox"/>	Person		
<input type="checkbox"/>	Type		

Configuring Job Fields on a Form

Once the **Job Parent Type** is selected, the list on the right will display all your **Job Details** Fields. These fields are pulled from the **Job Configurations** that were defined in the **Configurations Tab**. For guidance on configuring **Job Details**, [refer to this section of our Knowledge Base](#).

1. Navigate to the **Job Fields** box positioned in the center of the screen.
2. Select the **Job Fields** you wish to include on your form by marking the respective **Include** box.
3. Upon selection, the field will move to the top of the list and reveal additional properties – **Read Only** and **Sort Order**.
4. Once all desired fields are included, customize whether the field should be **Read Only**. Enabling **Read Only** restricts edits to the field to users completing the form in the **Tablet App**. A greyed-out **Read Only** box indicates the field has been set as **Read Only** in the **Configurations Tab** or by ActionFlow. **NOTE:** If the **Read Only** option is not enabled, any data entered in these fields on the form will automatically update ActionFlow with the new information.
5. If desired, adjust the **Sort Order** of the fields on your form. **NOTE:** If selected, **Customer Name** and **Job Name** will always be placed at the top of the form regardless of where they are placed in the **Sort Order**.
6. **Save** your changes.



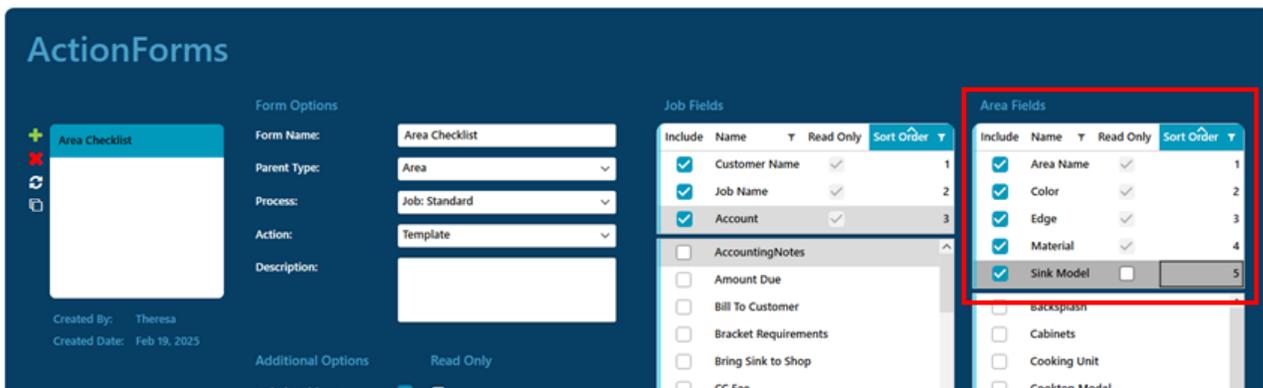
The screenshot shows the 'ActionForms' configuration interface. On the left, there is a 'Template Checklist' box. In the center, 'Form Options' are configured: Form Name: Template Checklist, Parent Type: Job, Process: Job: Standard, Action: Template, and Description: Checklist completed at template. At the bottom, 'Additional Options' include 'Include Address' with two checked boxes. On the right, the 'Job Fields' table is highlighted with a red border. It contains a list of fields with checkboxes for 'Include', 'Read Only', and a 'Sort Order' column.

Include	Name	Read Only	Sort Order
<input checked="" type="checkbox"/>	Customer Name	<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	Job Name	<input checked="" type="checkbox"/>	2
<input checked="" type="checkbox"/>	Account	<input checked="" type="checkbox"/>	3
<input type="checkbox"/>	AccountingNotes	<input type="checkbox"/>	
<input type="checkbox"/>	Amount Due	<input type="checkbox"/>	
<input type="checkbox"/>	Bill To Customer	<input type="checkbox"/>	
<input type="checkbox"/>	Bracket Requirements	<input type="checkbox"/>	
<input type="checkbox"/>	Bring Sink to Shop	<input type="checkbox"/>	
<input type="checkbox"/>	CC Fee	<input type="checkbox"/>	

Configuring the Area Fields on a Form

Upon selecting the **Area Parent Type**, two lists will populate – **Job Fields** and **Area Fields**. These fields are derived from the **Job Configurations** defined in the **Configurations Tab**. For instructions on configuring **Area Details**, [refer to this section of our Knowledge Base](#).

1. Begin by configuring the **Job Fields** you wish to include on the **Area** form, [following the steps outlined in this section of the guide](#).
2. Locate to the **Area Fields** positioned to the right of the **Job Fields** box.
3. Select the **Area Fields** you want to add to your form by checking the **Include** box.
4. Once a field is chosen, it will move to the top of the list and reveal additional properties – **Read Only** and **Sort Order**.
5. After including all the desired fields, customize whether the field should be **Read Only**. Enabling **Read Only** restricts user edits to the field when filling out the form in the **Tablet App**. A greyed-out **Read Only** box signifies the field has been set as **Read Only** in the **Configurations Tab** or by ActionFlow. **NOTE:** If **Read Only** is not enabled, any data entered in these fields on the form will automatically update ActionFlow with the new information.
6. If desired, adjust the **Sort Order** of the fields on your form. **NOTE:** If enabled, **Customer Name**, **Job Name** and **Area Name** will always be placed at the top of the form regardless of where they are placed in the **Sort Order**.
7. **Save** your changes.



The screenshot displays the 'ActionForms' configuration interface. On the left, there is a form preview for 'Area Checklist'. The 'Form Options' section includes: Form Name: Area Checklist, Parent Type: Area, Process: Job: Standard, Action: Template, and a Description field. Below this, it shows 'Created By: Theresa' and 'Created Date: Feb 19, 2025'. The 'Additional Options' section has a 'Read Only' checkbox.

The 'Job Fields' list is as follows:

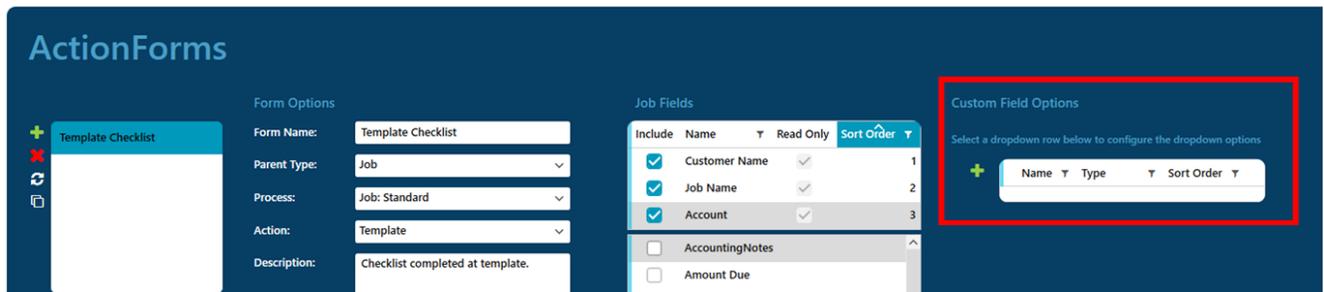
Include	Name	Read Only	Sort Order
<input checked="" type="checkbox"/>	Customer Name	<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	Job Name	<input checked="" type="checkbox"/>	2
<input checked="" type="checkbox"/>	Account	<input checked="" type="checkbox"/>	3
<input type="checkbox"/>	AccountingNotes		
<input type="checkbox"/>	Amount Due		
<input type="checkbox"/>	Bill To Customer		
<input type="checkbox"/>	Bracket Requirements		
<input type="checkbox"/>	Bring Sink to Shop		
<input type="checkbox"/>	CC Fee		

The 'Area Fields' list is highlighted with a red box and is as follows:

Include	Name	Read Only	Sort Order
<input checked="" type="checkbox"/>	Area Name	<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	Color	<input checked="" type="checkbox"/>	2
<input checked="" type="checkbox"/>	Edge	<input checked="" type="checkbox"/>	3
<input checked="" type="checkbox"/>	Material	<input checked="" type="checkbox"/>	4
<input checked="" type="checkbox"/>	Sink Model	<input type="checkbox"/>	5
<input type="checkbox"/>	Backsplash		
<input type="checkbox"/>	Cabinets		
<input type="checkbox"/>	Cooking Unit		
<input type="checkbox"/>	Cooktop Model		

Configuring Custom Fields for a Form in the Desktop App

Add a unique touch to your form by incorporating Custom Fields, perfect for creating checklists, surveys or waivers.



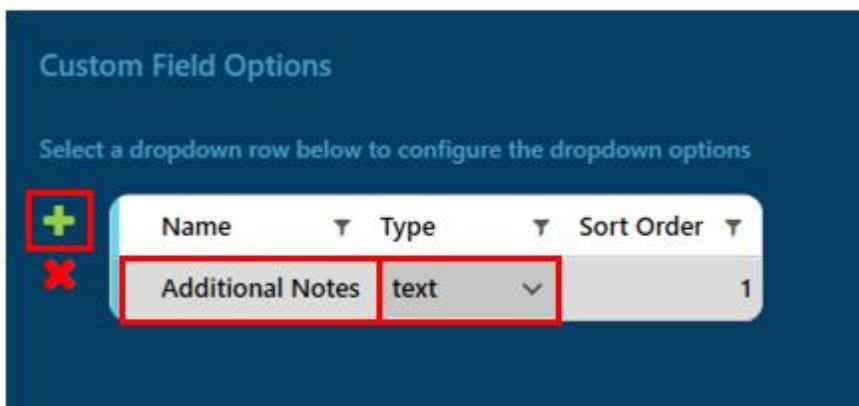
The available field types are:

- Text:** A text box that will accept all characters.
- Number:** Accepts numerical inputs only.
- Checkbox:** Provides the option to mark or leave blank.
- Dropdown:** Select from a list of predefined responses or options.
- Date:** Formatted for date inputs.
- Text Block:** Creates a non-editable block of text within the form.

Including a Custom Text Field

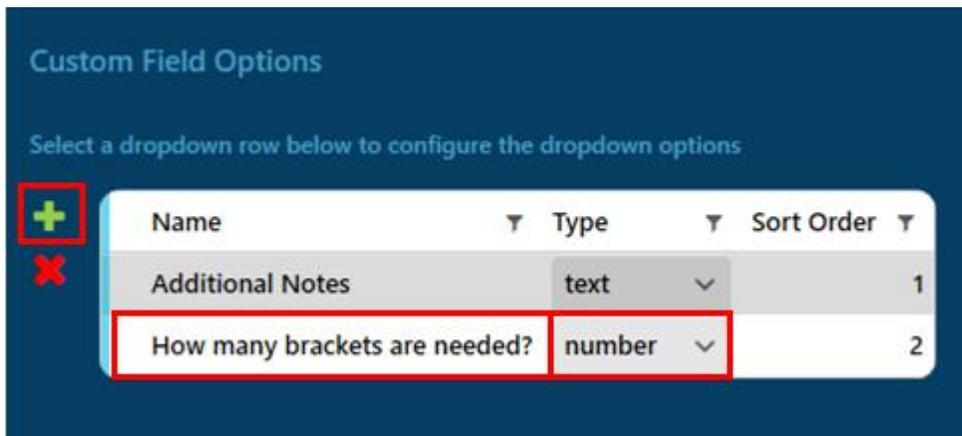
The **Text** field provides users with a single-line text box for data input. To switch to a multi-line text box, incorporate the term "notes" in the field name, which will generate a multi-line box on the form. There are no restrictions on the number of characters that can be entered in a text box.

1. Locate the **Custom Field Options** on the right side of your screen.
2. Click the **Green +** to create a Custom Field.
3. Enter the desired name, statement or question in the field.
4. Next select the **Text** field type. This will create a text box on the form that accepts all characters.
5. Customize the order of the custom fields on your form using the **Sort Order**, if necessary.
6. **Save** your changes.



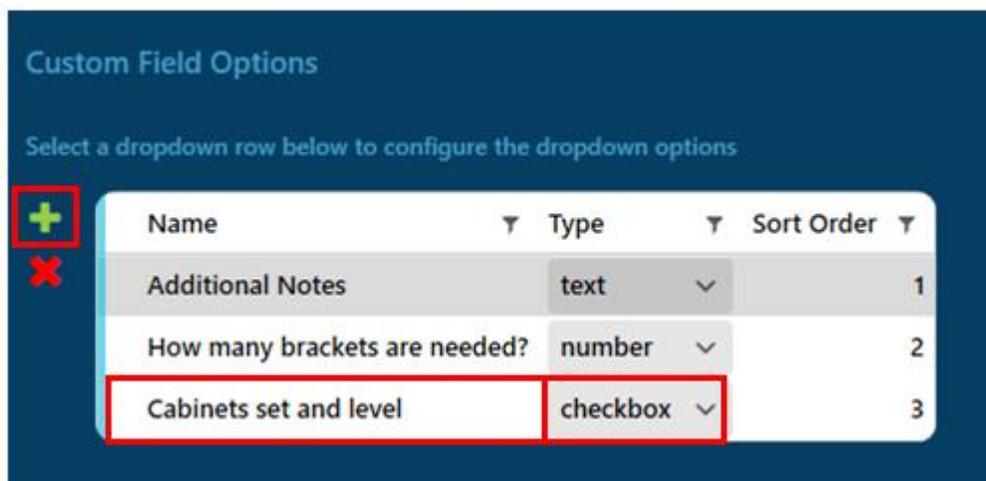
Including a Custom Number Field

1. Locate the **Custom Field Options** on the right side of your screen.
2. Click the **Green +** to create a Custom Field.
3. Enter the desired name, statement or question for the field.
4. Next select the **Number** field type. This field type only accepts numerical inputs.
5. Customize the order of the custom fields on your form using the **Sort Order**, if necessary.
6. **Save** your changes.



Including a Custom Checkbox Field

1. Locate the **Custom Field Options** on the right side of your screen.
2. Click the **Green +** to create a Custom Field.
3. Enter the desired name, statement or question for the field.
4. Next select the **Checkbox** field type. This field type gives users the option to mark or leave blank. **NOTE:** On the form this will be denoted as **True** if checked and **False** if unchecked.
5. Customize the order of the custom fields on your form using the **Sort Order**, if necessary.
6. **Save** your changes.



Including a Custom Dropdown Field

1. Locate the **Custom Field Options** on the right side of your screen.
2. Click the **Green +** to create a Custom Field.
3. Enter the desired name, statement or question for the field.
4. Next select the **Dropdown** field type. This field type allows users to select from a list of predefined responses or options.
5. An additional section will appear where you can input your dropdown options.
6. Click the **Green +** to create a **Dropdown** option.
7. Enter the relevant option name in the field.
8. Customize the order of the custom fields or dropdown options on your form using the **Sort Order**, if necessary.
9. **Save** your changes.

Custom Field Options

Select a dropdown row below to configure the dropdown options

+	×	Name	Type	Sort Order
		Additional Notes	text	1
		How many brackets are needed?	number	2
		Cabinets set and level	checkbox	3
		How did we do today?	dropdown	4

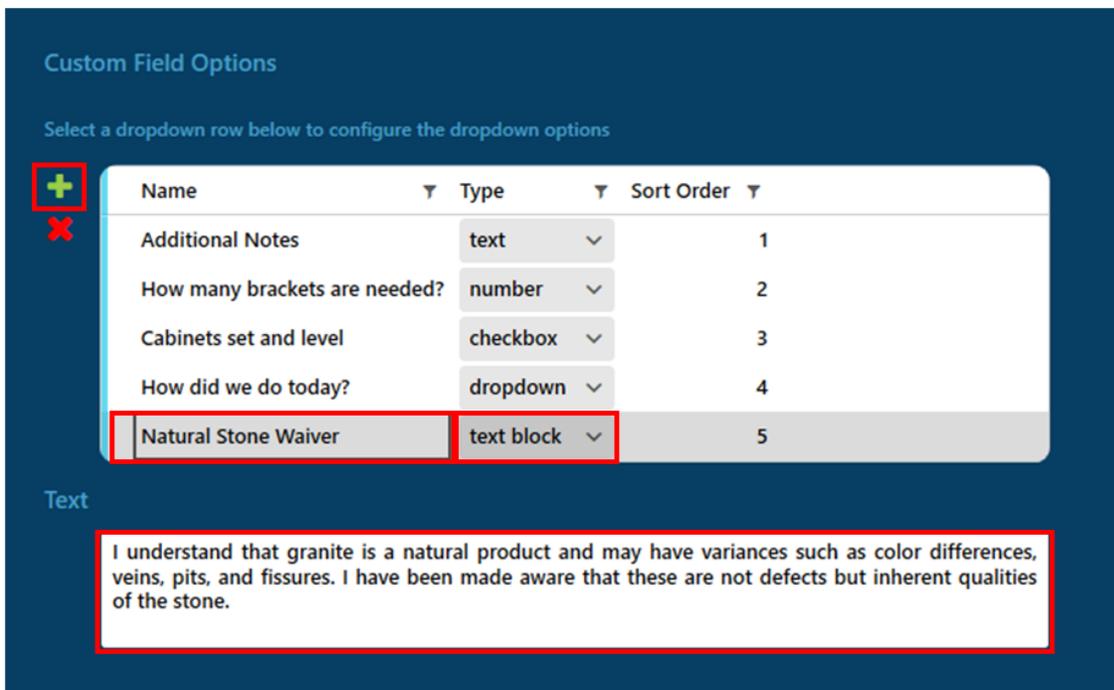
Dropdown Options

+	×	Name	SortOrder
		Excellent	1
		OK	2
		Not so good	3

Including a Custom Text Block

The custom **text block** provides a dedicated area to include waivers, disclaimers, or any additional context you wish. Administrators have the option to add **Customer/Job/Area** fields within the **text block** to create a more personalized message. There are no restrictions on the character limit within the **text block**.

1. Locate the **Custom Field Options** on the right side of your screen.
2. Click the **Green +** to create a Custom Field.
3. Enter the desired name for the field. **NOTE:** The name of the field will not display on the form when **Text Block** field type is chosen.
4. Next select the **Text Block** field type, which will create a non-editable block of text within the form.
5. Enter the desired text or statement in the **Text** field.



Custom Field Options

Select a dropdown row below to configure the dropdown options

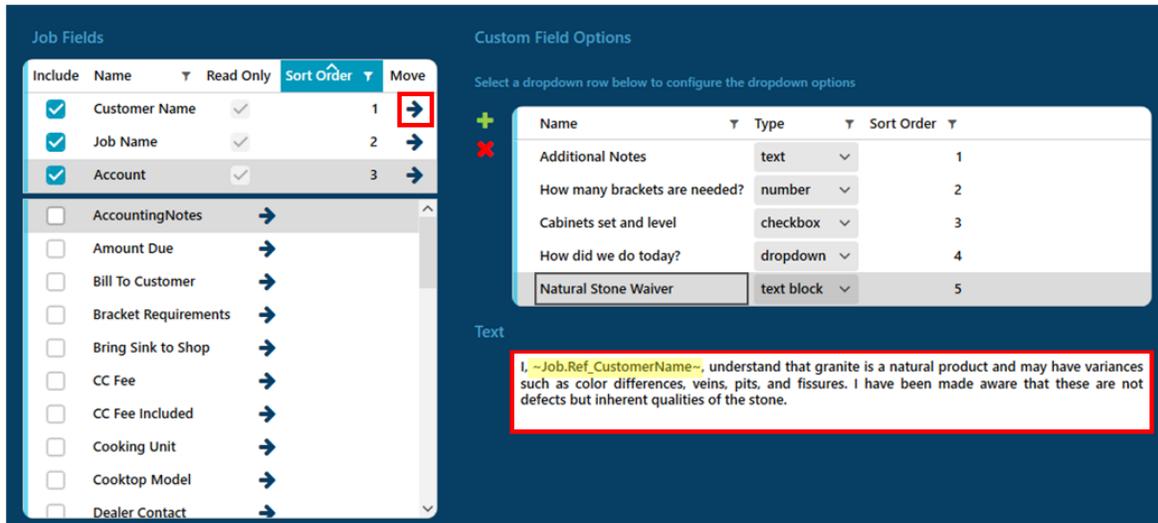
Name	Type	Sort Order
Additional Notes	text	1
How many brackets are needed?	number	2
Cabinets set and level	checkbox	3
How did we do today?	dropdown	4
Natural Stone Waiver	text block	5

Text

I understand that granite is a natural product and may have variances such as color differences, veins, pits, and fissures. I have been made aware that these are not defects but inherent qualities of the stone.

If desired, you can include additional **Customer/Job/Area** details within your text block, which will pull the information from ActionFlow and add the data into your text block.

1. Start by finding the appropriate field in your **Customer/Job/Area** Fields list.
2. Click on the **Blue Arrow** to add the data from that field to your **text block**. **NOTE:** There is no limit to the number of fields you can add to your **text block**.



The screenshot shows two panels. The left panel, titled 'Job Fields', contains a table with columns: Include, Name, Read Only, Sort Order, and Move. The right panel, titled 'Custom Field Options', contains a table with columns: Name, Type, and Sort Order. Below the 'Custom Field Options' table is a 'Text' field containing a sample text block with a red border.

Include	Name	Read Only	Sort Order	Move
<input checked="" type="checkbox"/>	Customer Name	<input checked="" type="checkbox"/>	1	→
<input checked="" type="checkbox"/>	Job Name	<input checked="" type="checkbox"/>	2	→
<input checked="" type="checkbox"/>	Account	<input checked="" type="checkbox"/>	3	→
<input type="checkbox"/>	AccountingNotes			→
<input type="checkbox"/>	Amount Due			→
<input type="checkbox"/>	Bill To Customer			→
<input type="checkbox"/>	Bracket Requirements			→
<input type="checkbox"/>	Bring Sink to Shop			→
<input type="checkbox"/>	CC Fee			→
<input type="checkbox"/>	CC Fee Included			→
<input type="checkbox"/>	Cooking Unit			→
<input type="checkbox"/>	Cooktop Model			→
<input type="checkbox"/>	Dealer Contact			→

Name	Type	Sort Order
Additional Notes	text	1
How many brackets are needed?	number	2
Cabinets set and level	checkbox	3
How did we do today?	dropdown	4
Natural Stone Waiver	text block	5

Text

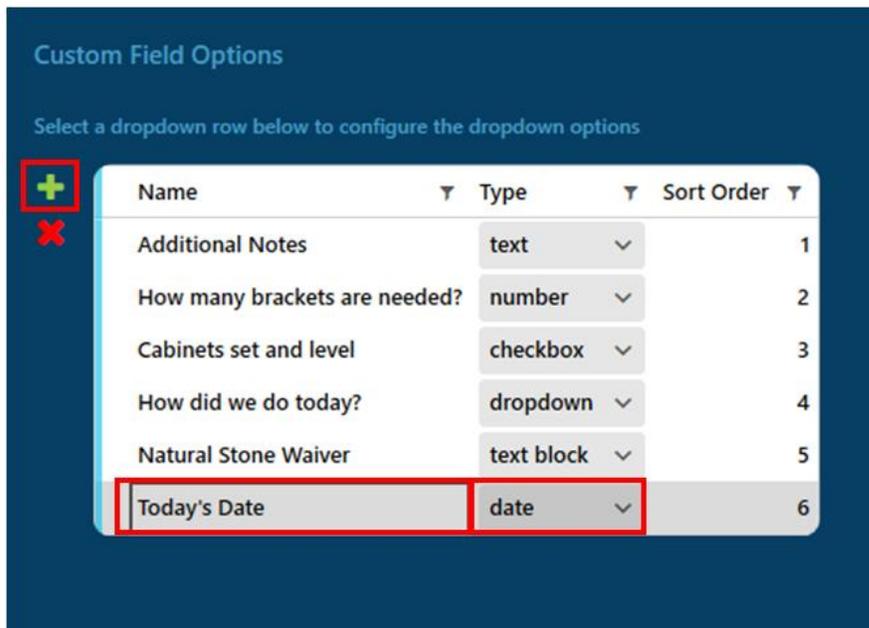
I, `--Job.Ref_CustomerName--`, understand that granite is a natural product and may have variances such as color differences, veins, pits, and fissures. I have been made aware that these are not defects but inherent qualities of the stone.

3. Customize the order of the custom fields on your form using the **Sort Order**, if necessary.
4. **Save** your changes.

Including a Custom Date Field

The **date** field allows the user to include a specific date on the form, serving various purposes such as date stamping upon form completion.

1. Locate the **Custom Field Options** on the right side of your screen.
2. Click the **Green +** to create a Custom Field.
3. Enter the desired name, statement or question for the field.
4. Next select the **Date** field type. This field type is formatted for date inputs.
5. Customize the order of the custom fields on your form using the **Sort Order**, if necessary.
6. **Save** your changes.



The screenshot shows the 'Custom Field Options' panel. At the top, it says 'Select a dropdown row below to configure the dropdown options'. Below this is a table with columns for Name, Type, and Sort Order. A green plus sign (+) is highlighted in a red box, indicating the 'Add' button. A red 'X' is also visible. The table contains the following rows:

Name	Type	Sort Order
Additional Notes	text	1
How many brackets are needed?	number	2
Cabinets set and level	checkbox	3
How did we do today?	dropdown	4
Natural Stone Waiver	text block	5
Today's Date	date	6