ActionForms Configuration for Administrators

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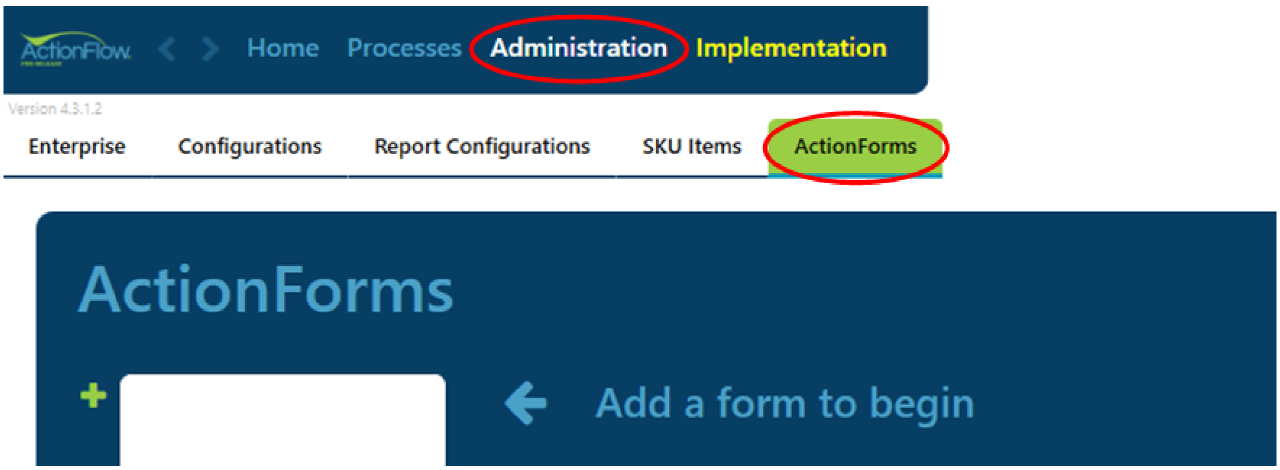
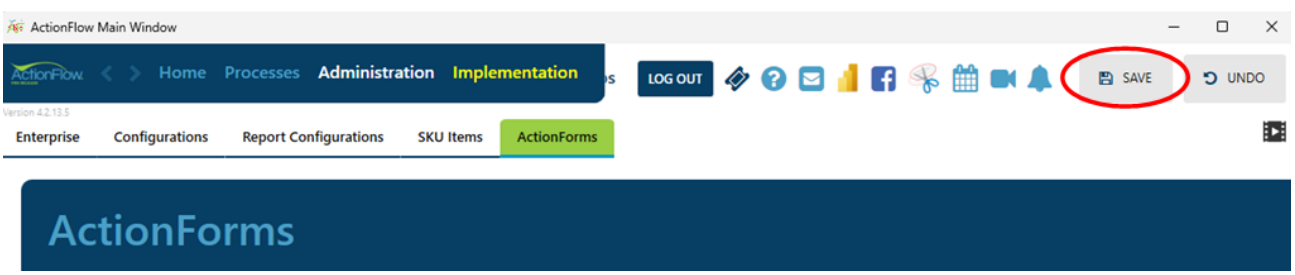
Accessing the ActionForms Tab in the Desktop App

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.



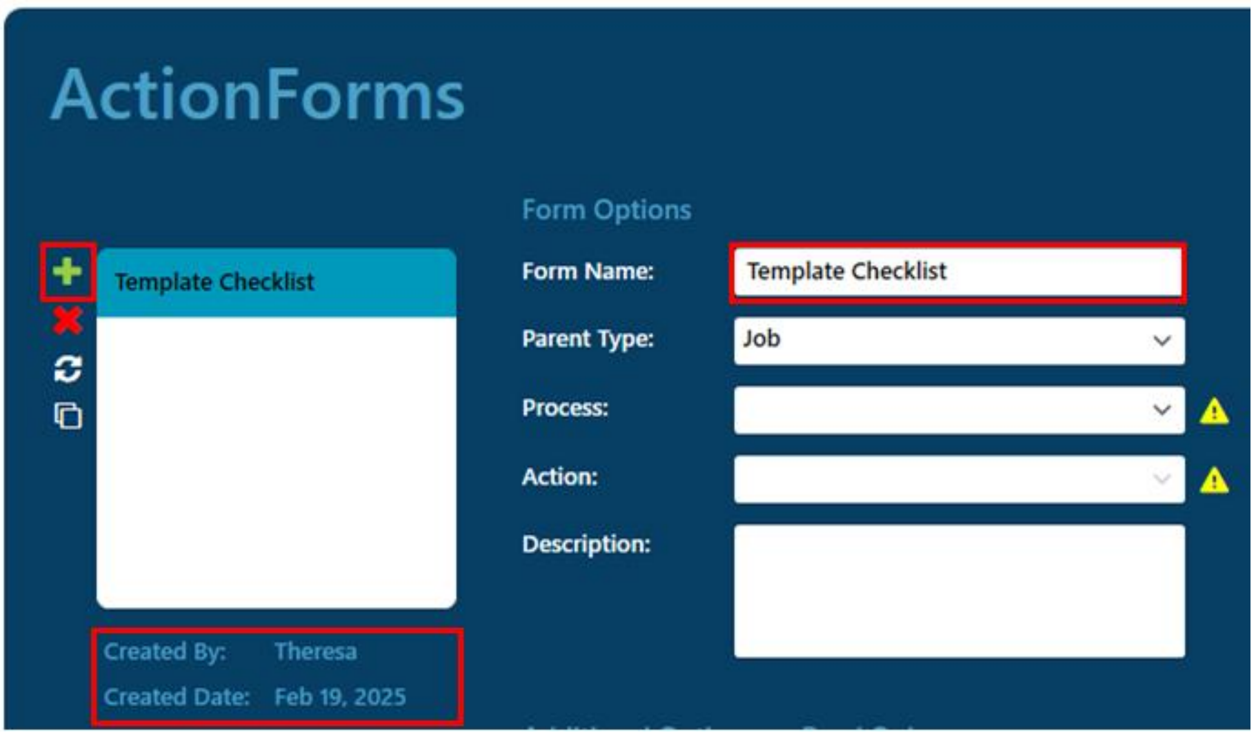
Getting Started with ActionForms in the Desktop App

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.

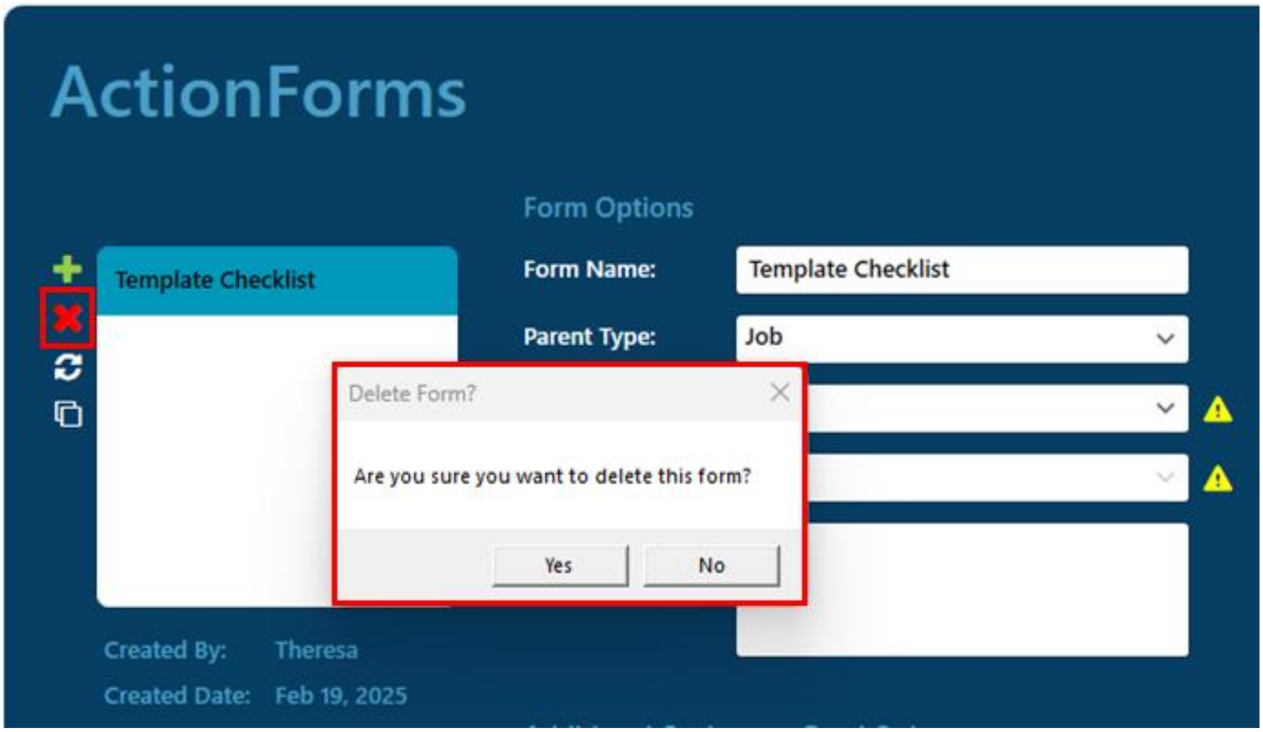
1. Click on the **Green +** button on the left to start your form.
2. Under the **Form Options** in the **Form Name** field, enter the desired name of the form.
3. Notice the **Created By** and **Created Date** fields which display the Administrator User's name and creation date of the form.
4. **Save**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



Deleting a Form

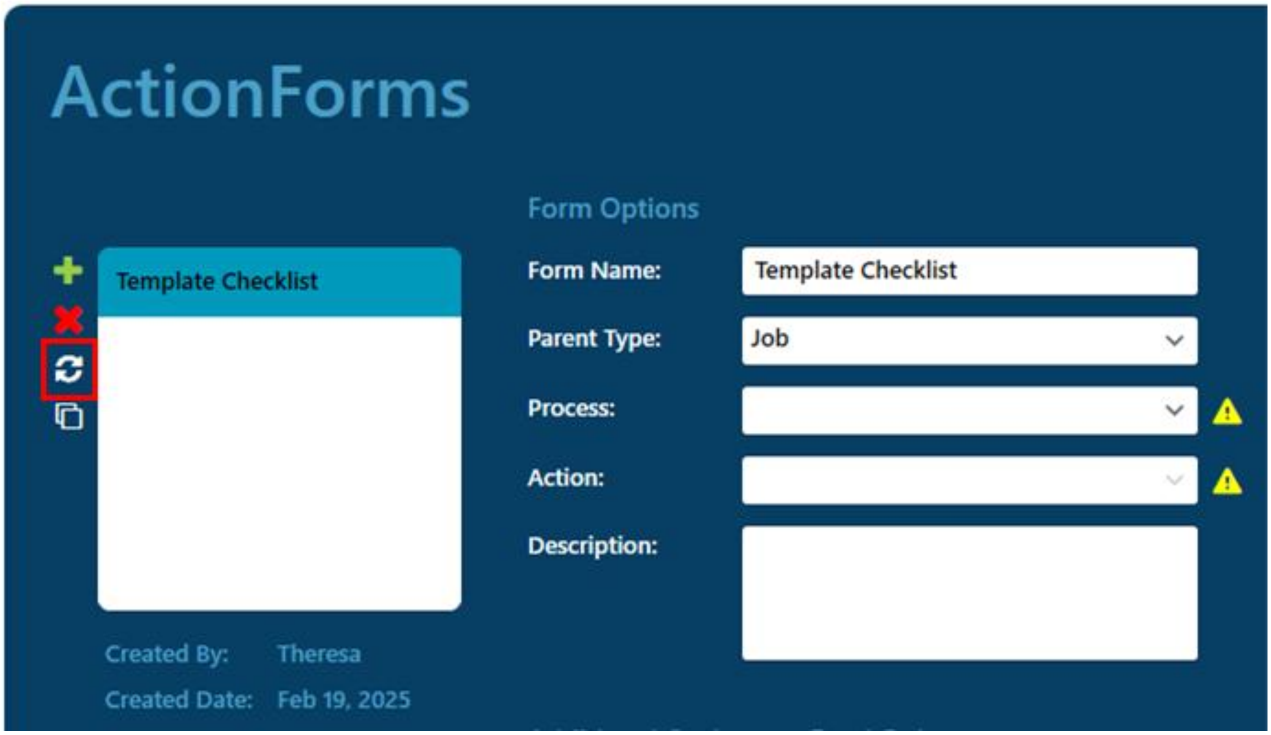
Administrators have the capability to delete forms. If you wish to archive or deactivate a form rather than deleting it entirely, refer to this section of this guide.

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

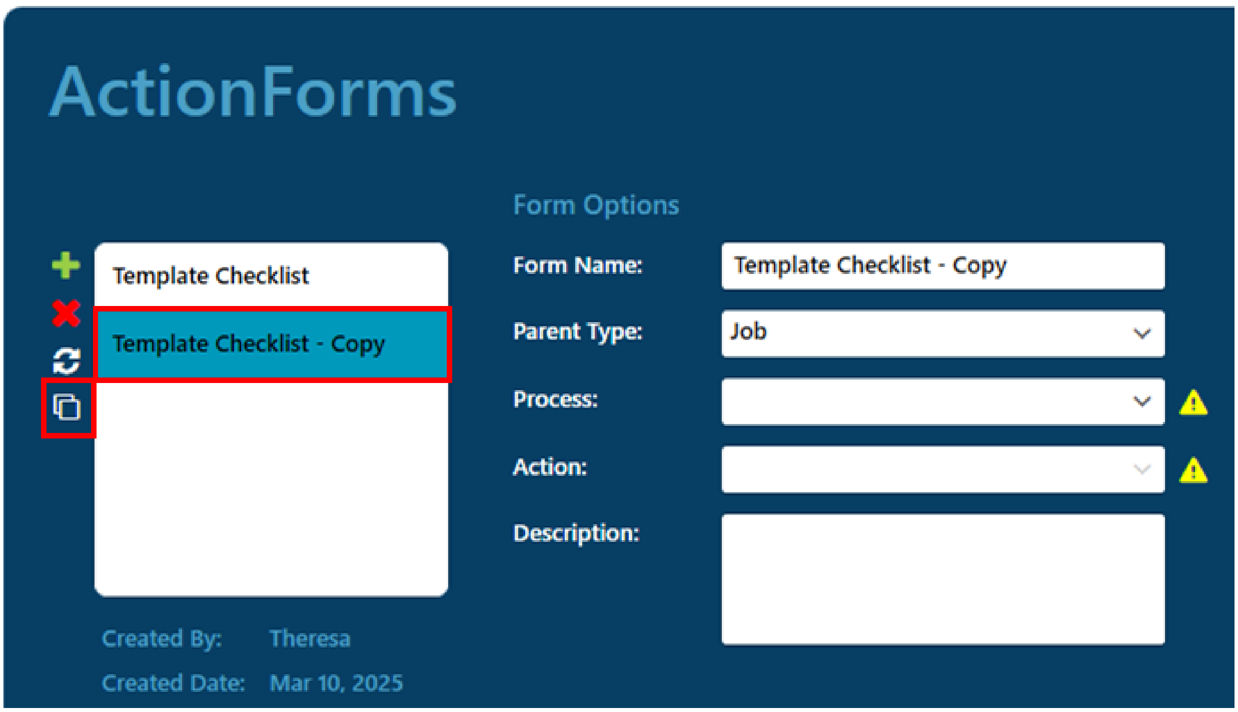
To ensure you are viewing the most up-to-date edits made by multiple Administrators working on forms simultaneously, it is essential to periodically refresh the list. Simply click on the **White Refresh** button to update the list and see the latest changes.



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.



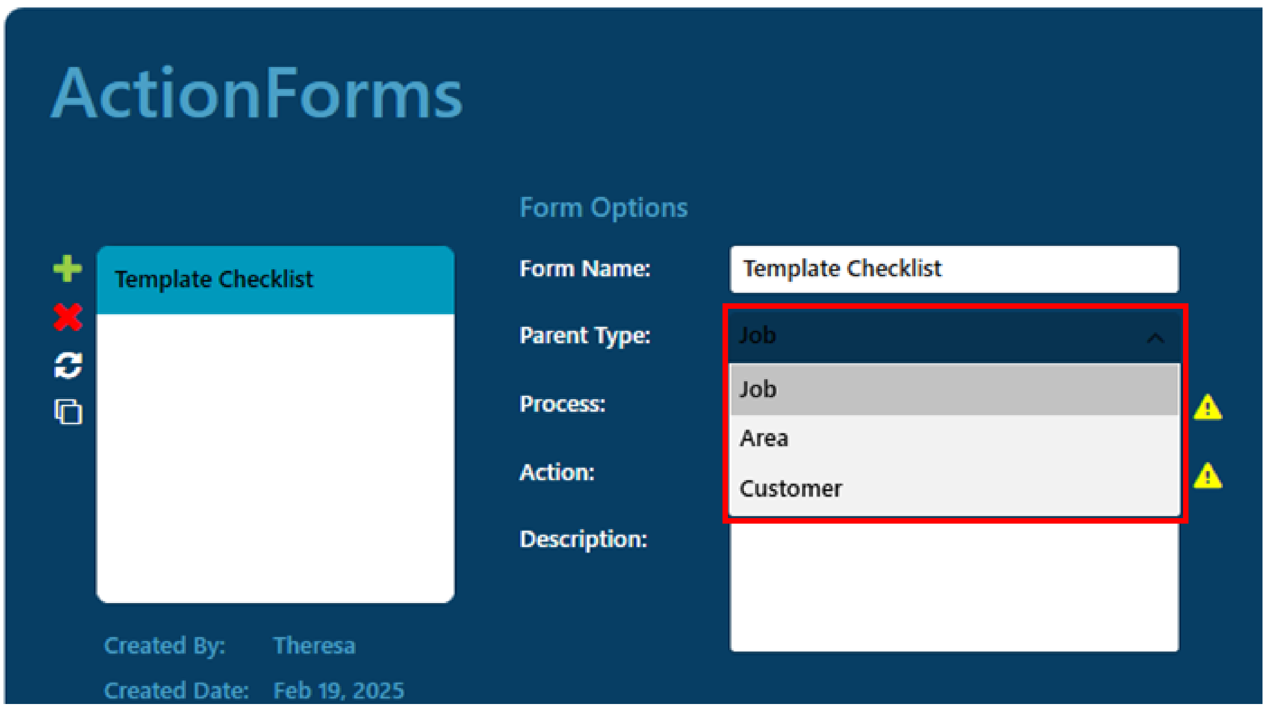
Selecting the Form Parent Type

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.

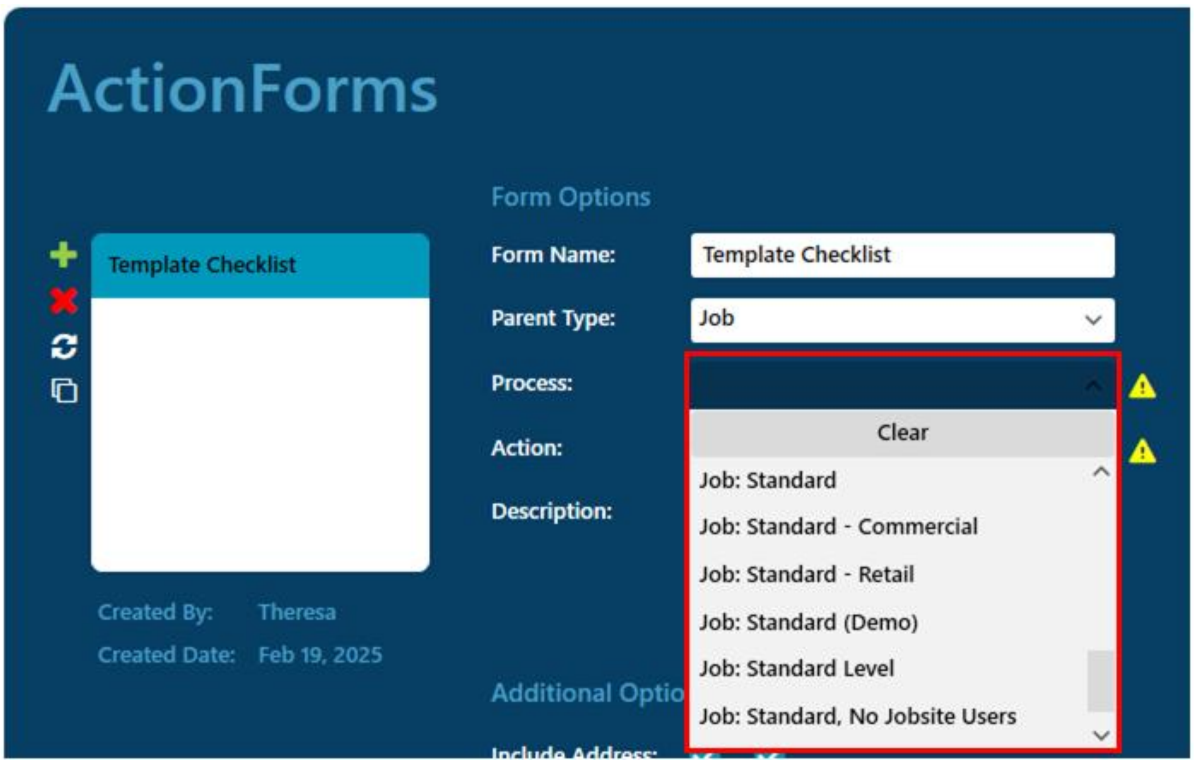
1. Locate the **Parent Type** field and click on the dropdown arrow to display the available options.
2. Choose the **Parent Type** that best suits your form's requirements.
3. **Save** your changes.



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.

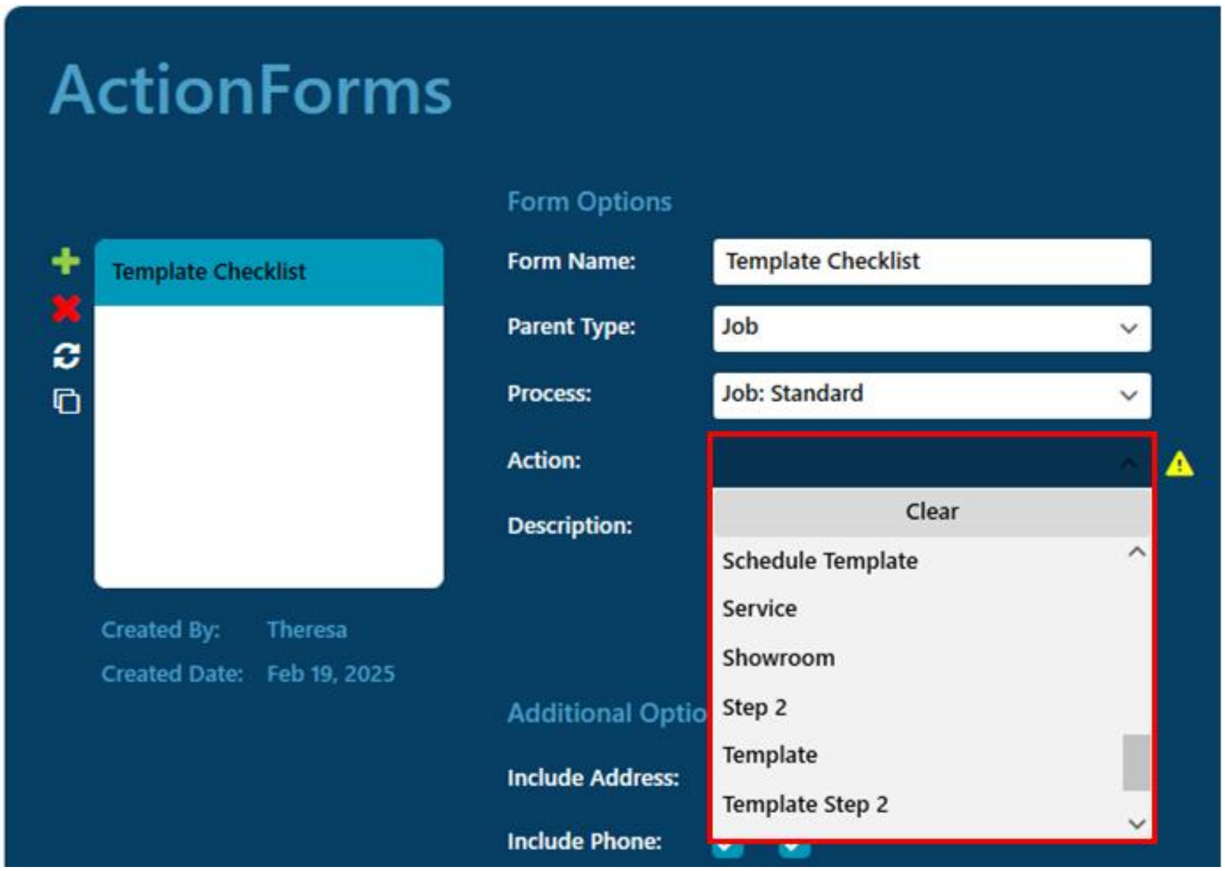
1. Navigate to the **Process** field and click the dropdown arrow to view the list.
2. Select the desired **Process**.
3. **Save** your changes.



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.

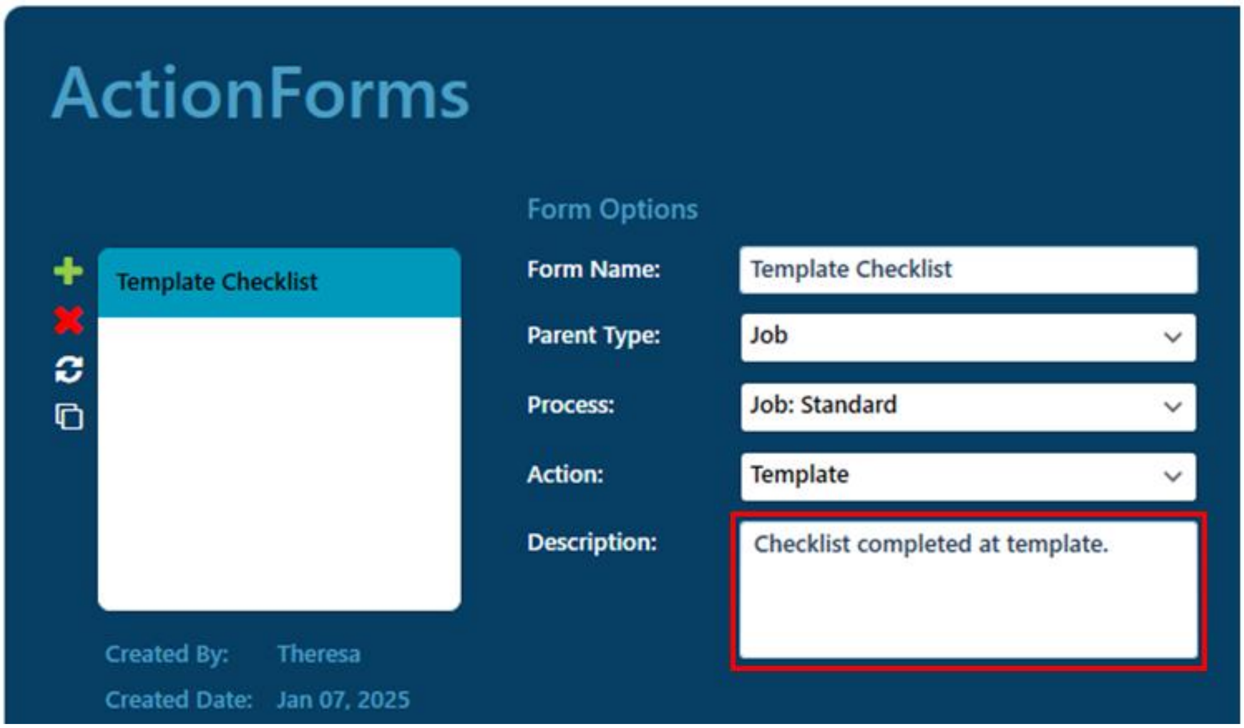
1. Locate the **Action** field and click on the dropdown arrow.
2. Select your desired **Action.**
3. **Save** your changes.



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.

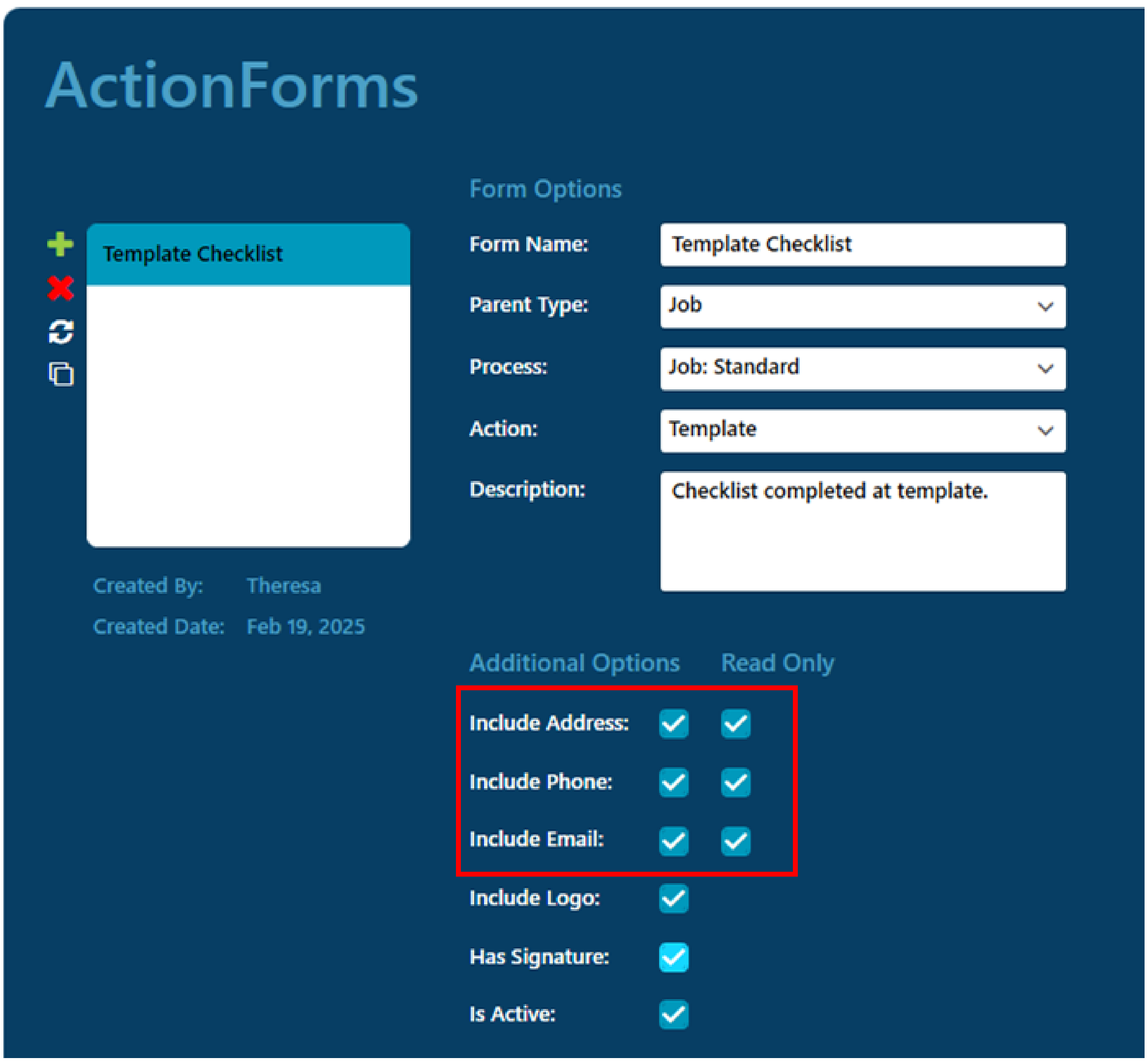


Including Additional Customer Information on the Form (Address, Phone and Email)

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.

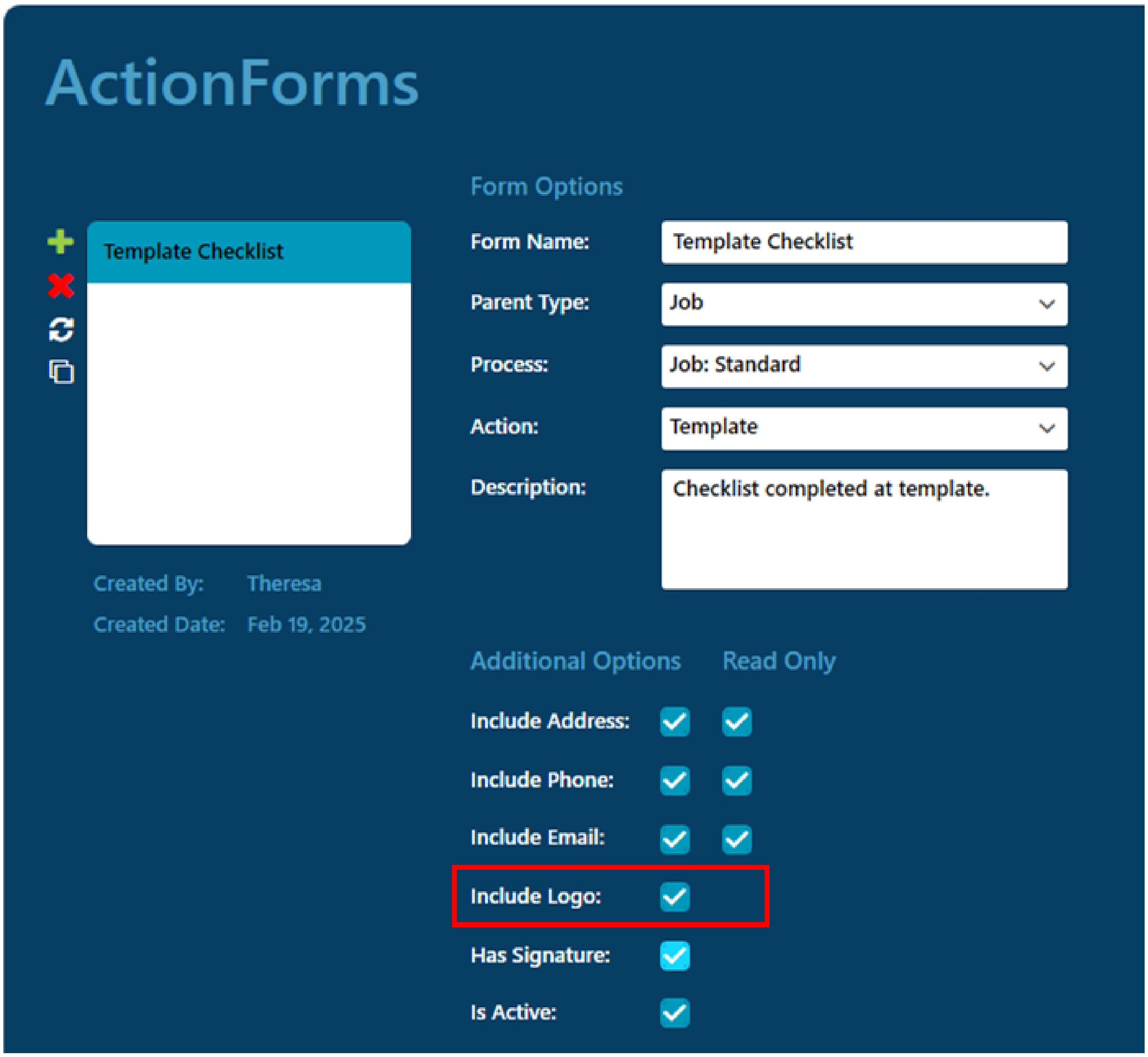
1. Navigate to the **Additional Options** section.
2. Select the **Options** you wish included on your form. If you want these to be **Read-Only**, be sure to check the corresponding box.
3. **Save** your changes.



Adding Your Logo to the Form

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

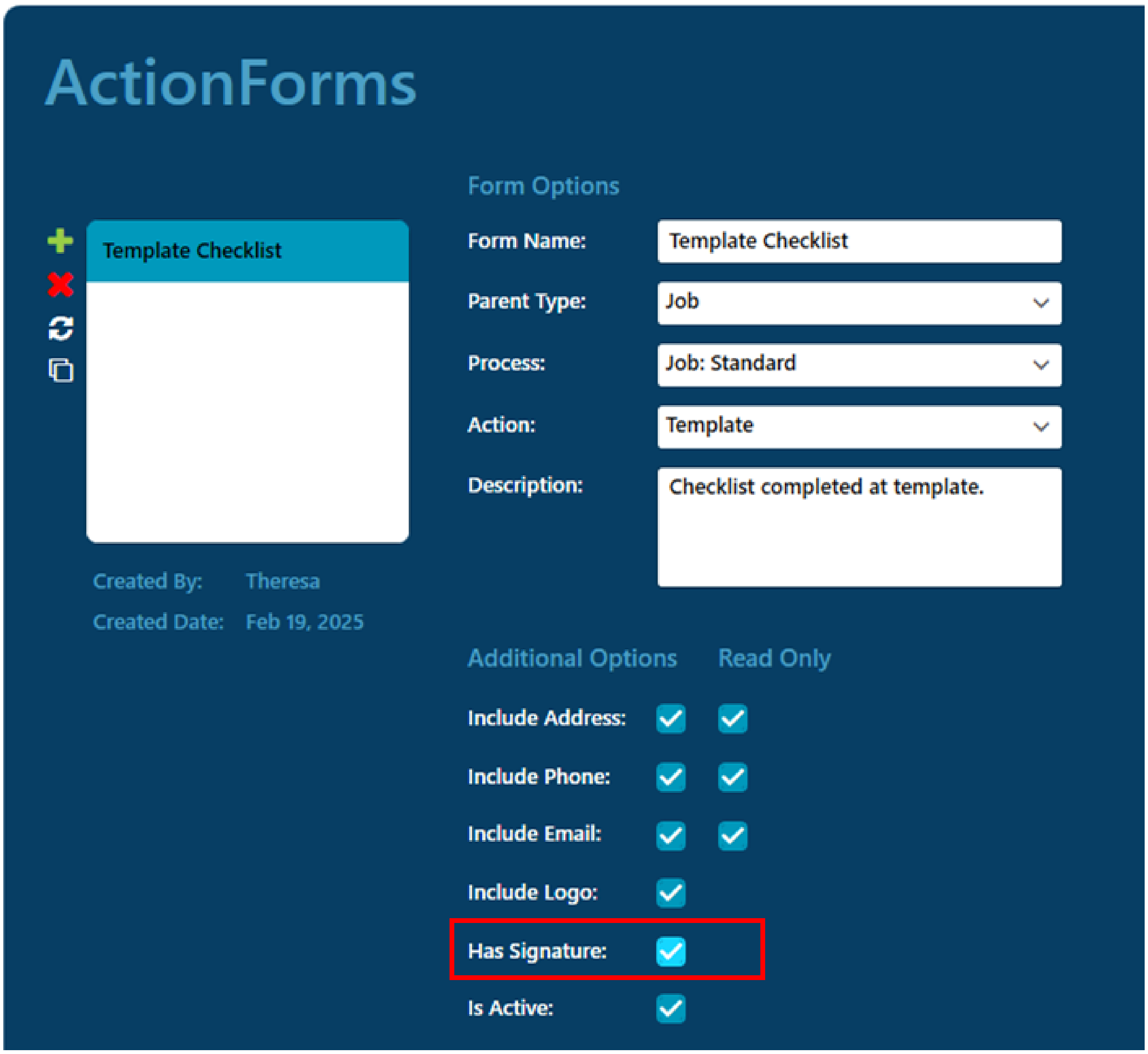
1. Find the **Include Logo** field under **Additional Options**.
2. Check the box to include your **Logo** on the form.
3. **Save** your changes.



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.

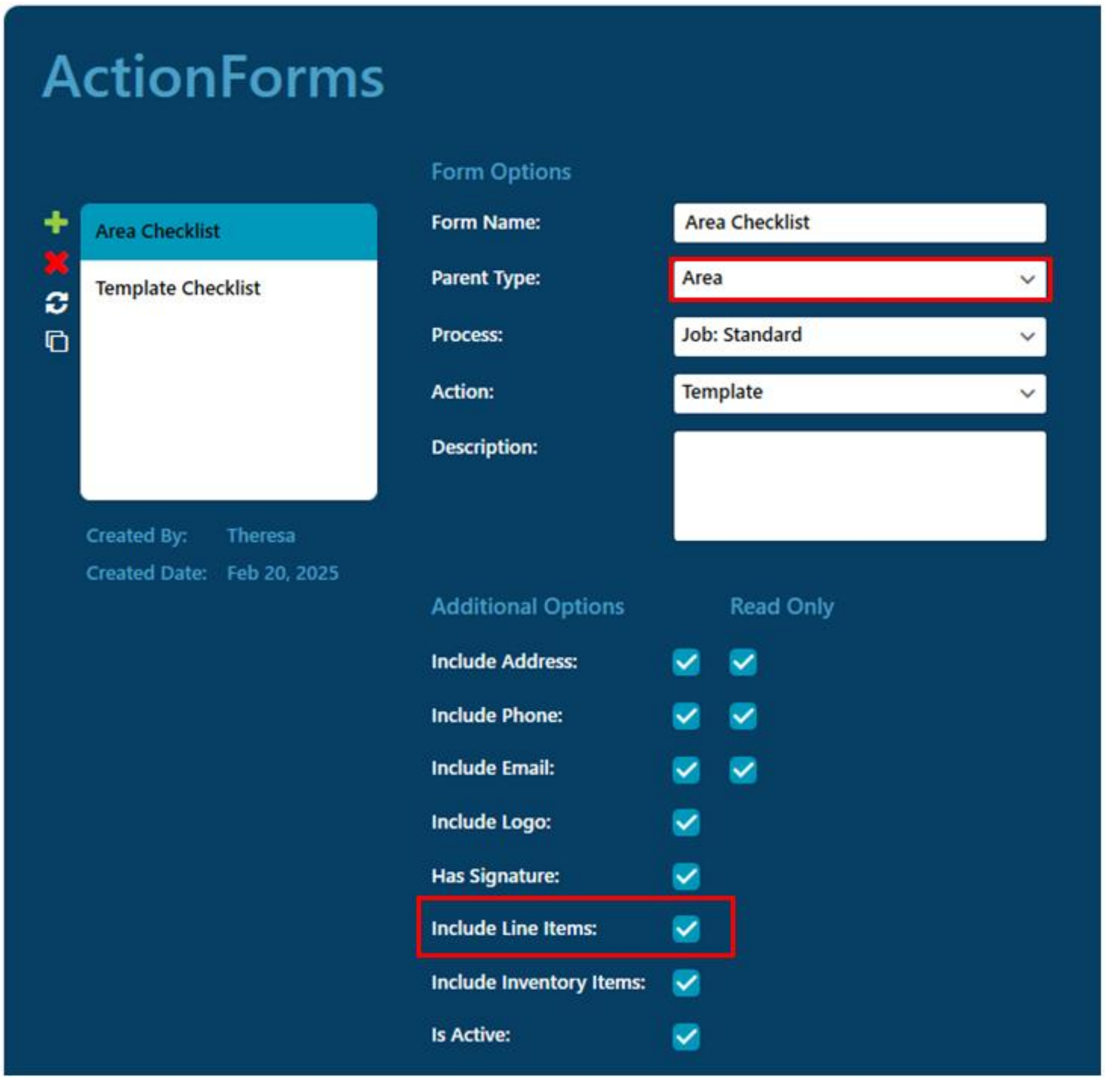
1. Find the **Has Signature** field under **Additional Options**.
2. Check the box to require a signature on the form.
3. **Save** your changes.



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.

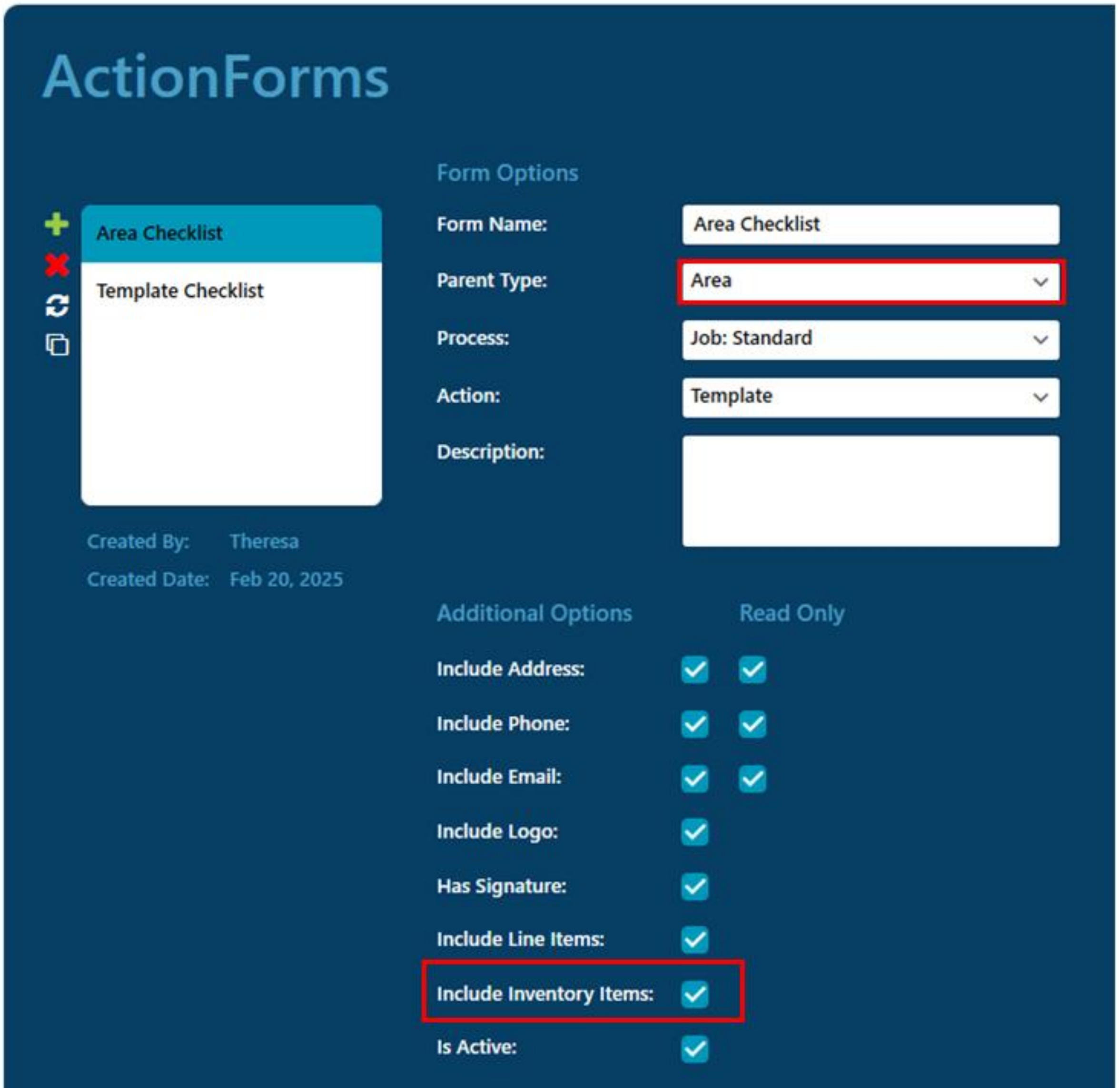
1. Select the **Area Parent Type**.
2. Locate the **Include Line Items** field under **Additional Options.**
3. Check the box to display **Line Items** on the form.
4. **Save** your changes.



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.

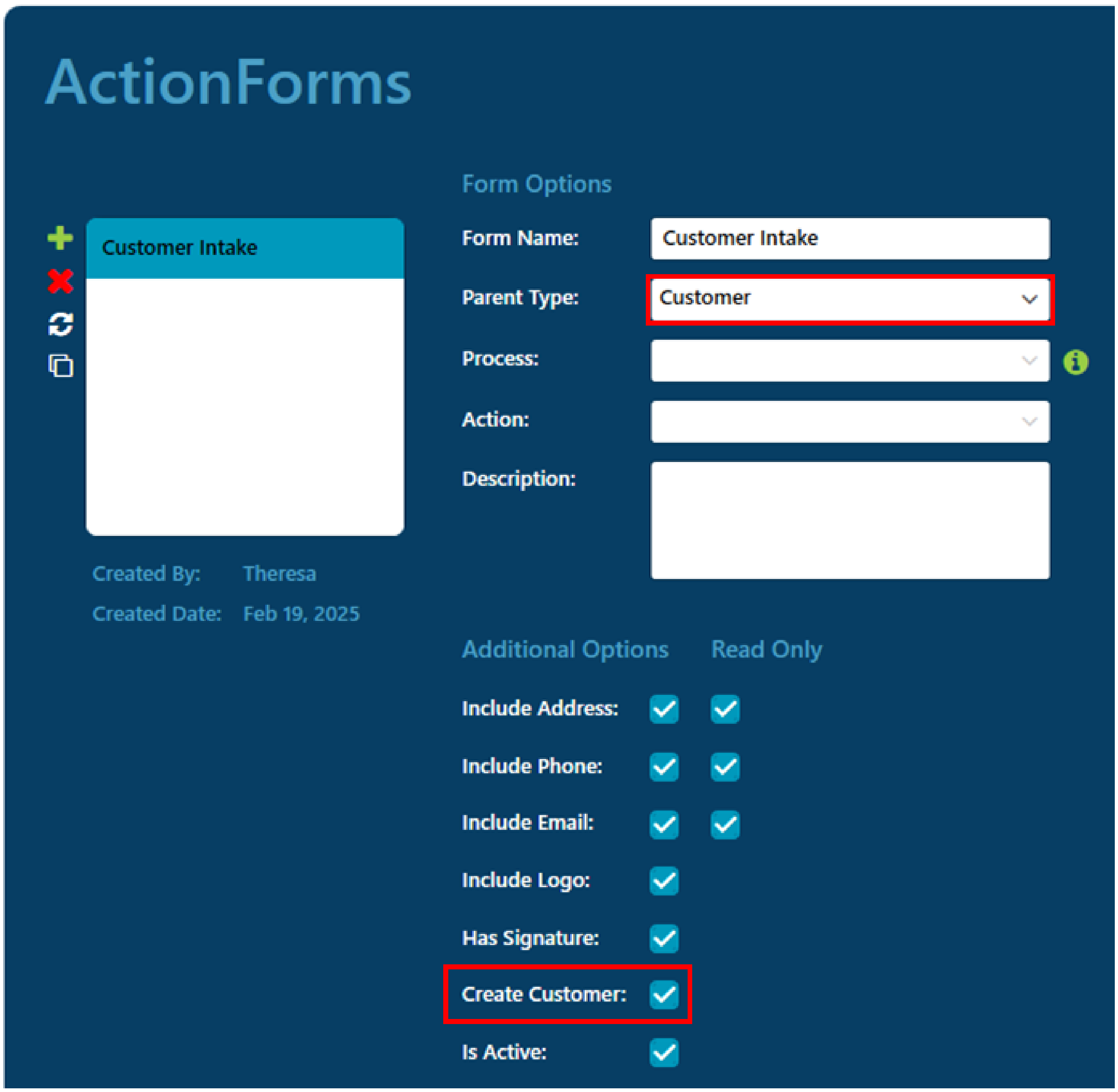
1. Select the **Area Parent Type**.
2. Locate the **Include Inventory Items** field under **Additional Options.**
3. Check the box to display **Inventory Items** on the form.
4. **Save** your changes.



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.

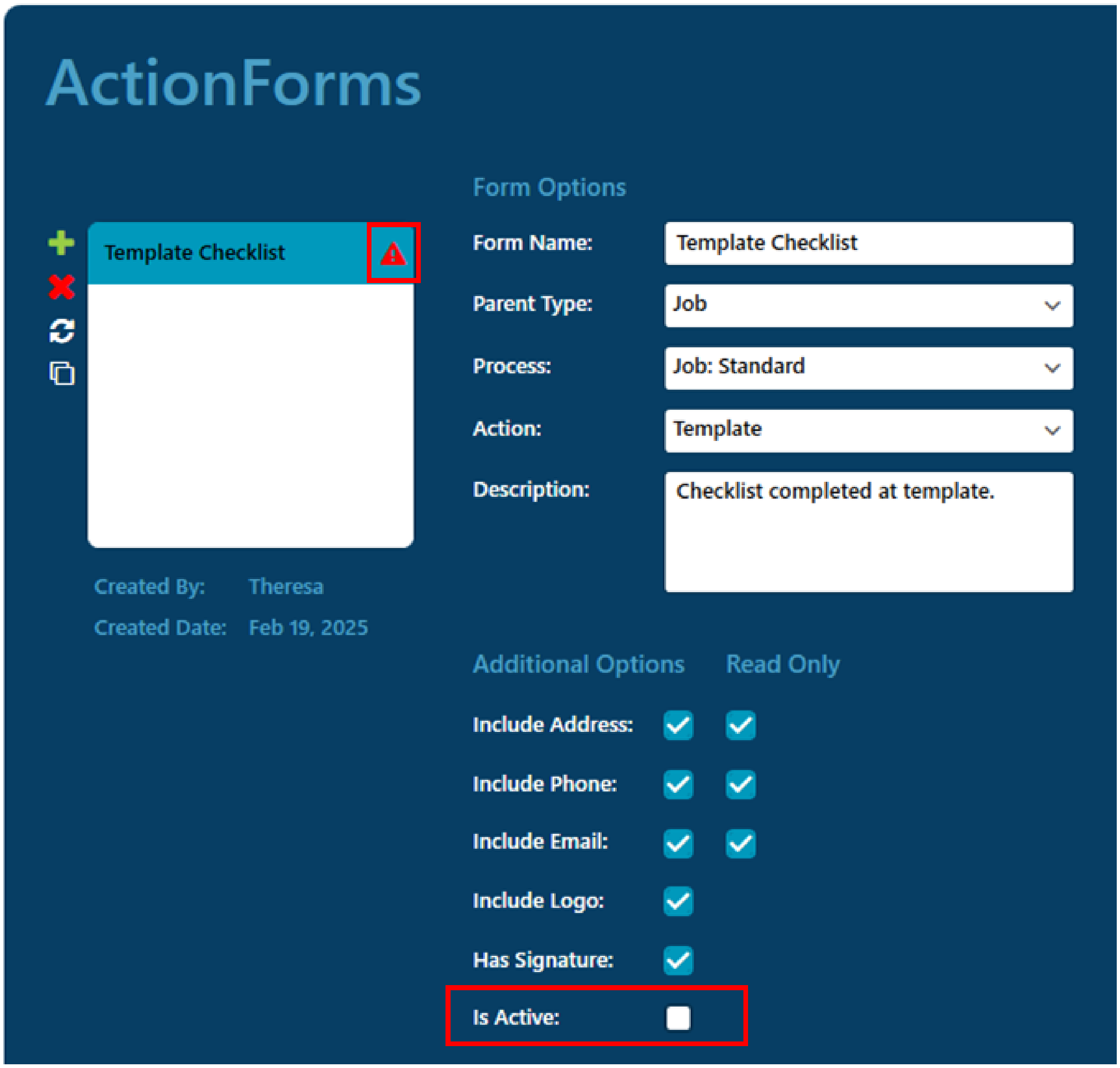
1. Ensure the **Parent Type** is set to **Customer.**
2. Navigate to the **Create Customer** field under **Additional Options**.
3. **Check the box** to enable the creation of a customer with this form. **NOTE:** Only one form in your account can have the **Create Customer** box enabled.
4. **Save**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



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.

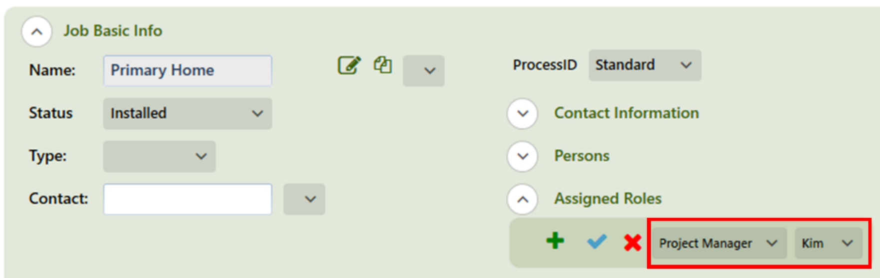


Setting Up Notifications for Completed Forms

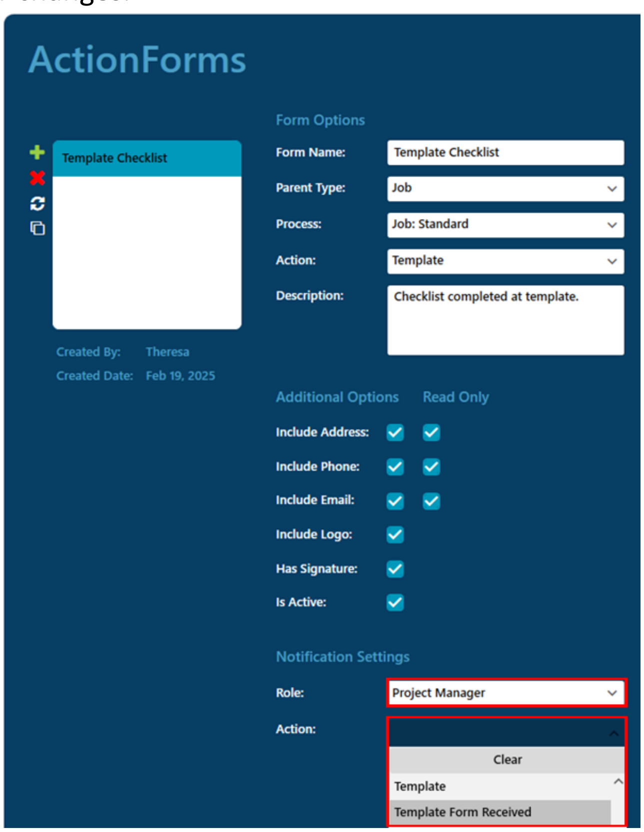
To ensure that Desktop Users are promptly informed when a form is completed and uploaded into ActionFlow, Administrators can configure notifications using the **Notification Settings** property.

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.



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.



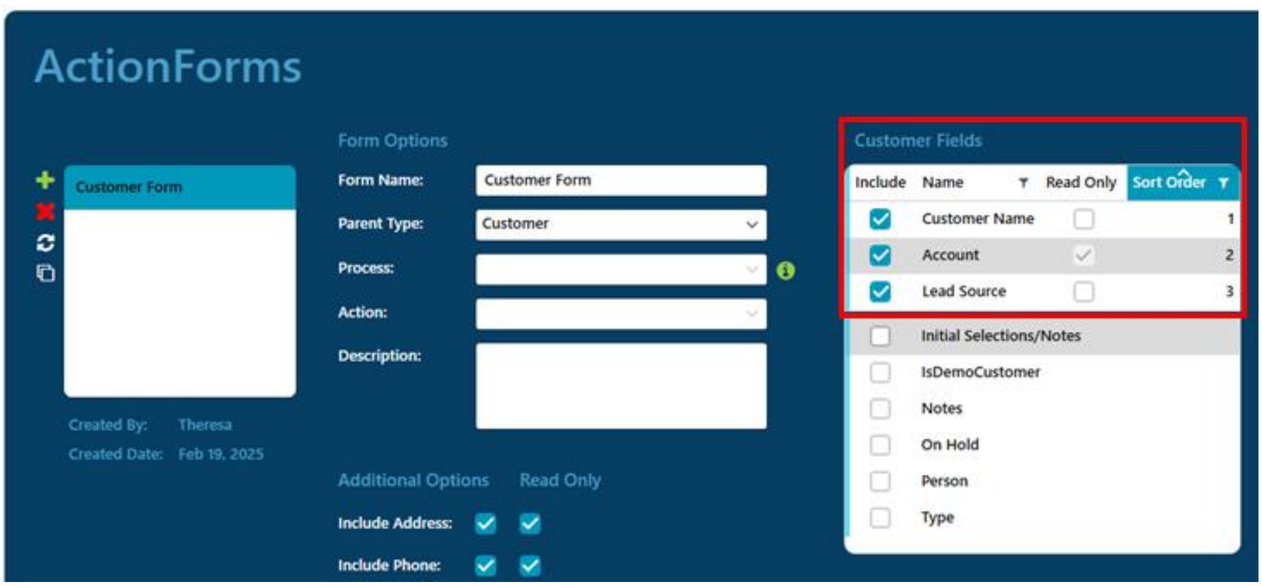
Setting up the Job, Customer and Area Fields to be Included on a Form in the Desktop App

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.

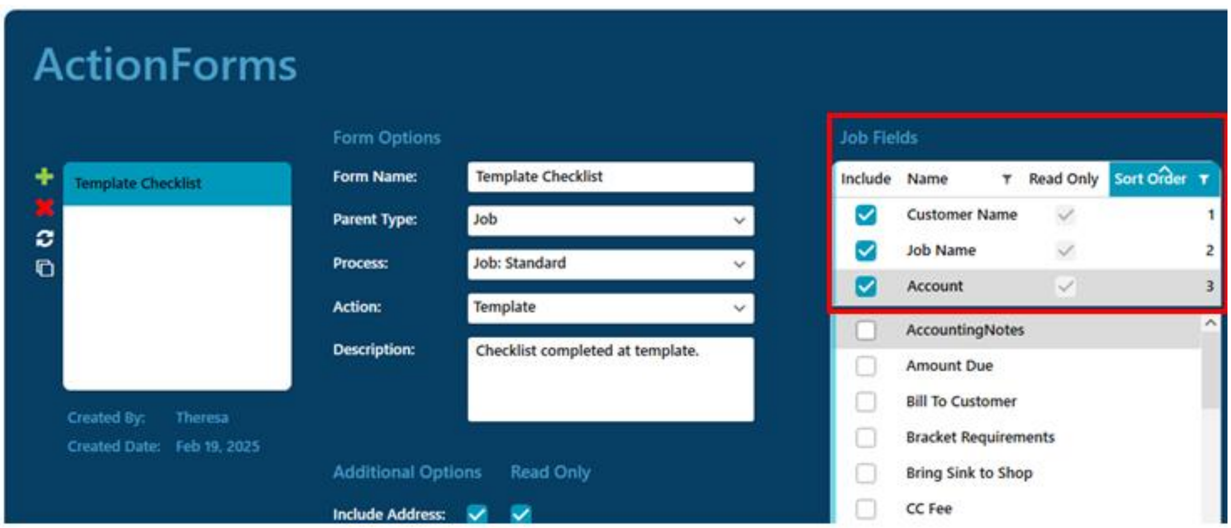
1. Locate the **Customer Fields** box positioned in the center of the screen.
2. Choose the **Customer Fields** you wish to include on your form by marking the respective **Include** box.
3. Upon selection, the field will move to the top of the list and reveal additional properties – **Read Only** and **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.



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.

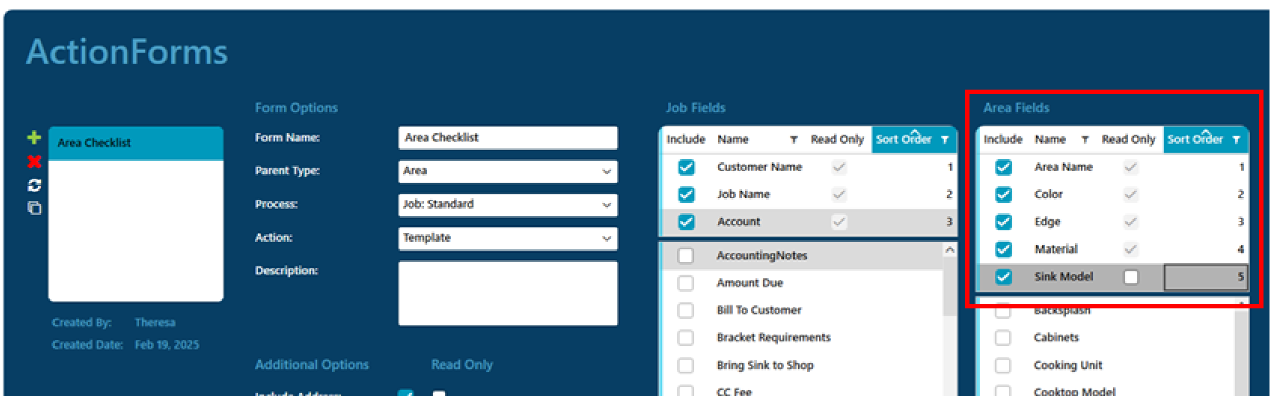
1. Navigate to the **Job Fields** box positioned in the center of the screen.
2. Select the **Job Fields** you wish to include on your form by marking the respective **Include** box.
3. Upon selection, the field will move to the top of the list and reveal additional properties – **Read Only** and **Sort 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.



Configuring the Area Fields on a Form

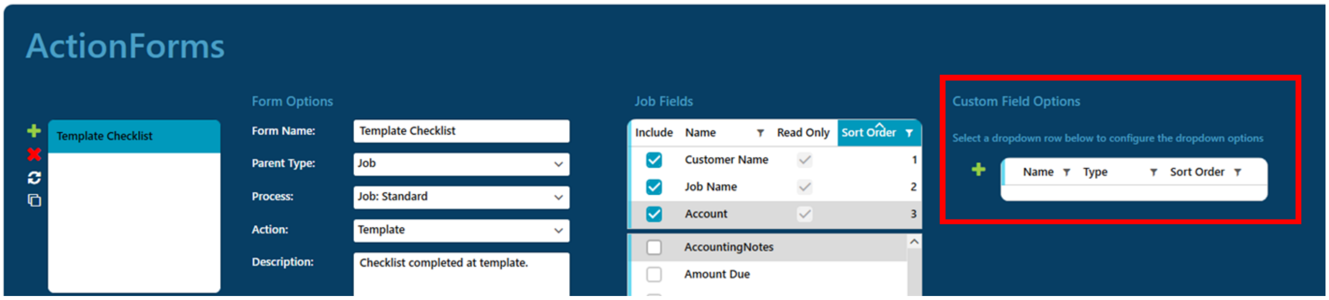
Upon selecting the **Area Parent Type**, two lists will populate – **Job Fields** and **Area Fields**. These fields are derived from the **Job Configurations** defined in the **Configurations Tab**. For instructions on configuring **Area Details**, [refer to this section of our Knowledge Base](#).

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.



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.



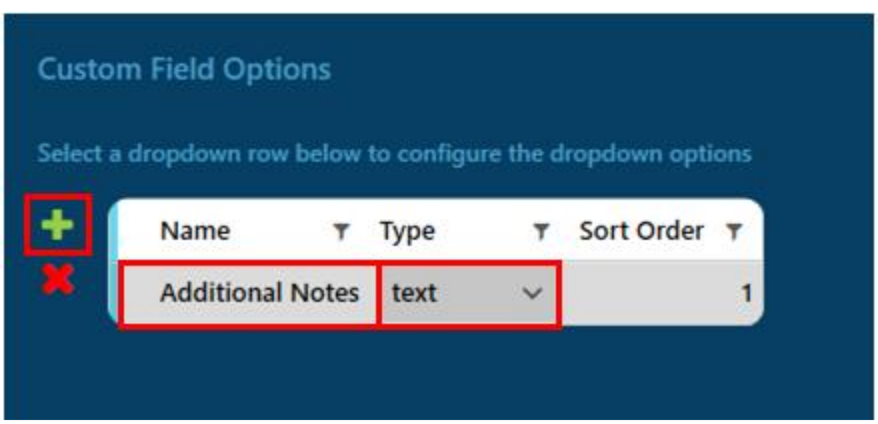
The available field types are:

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

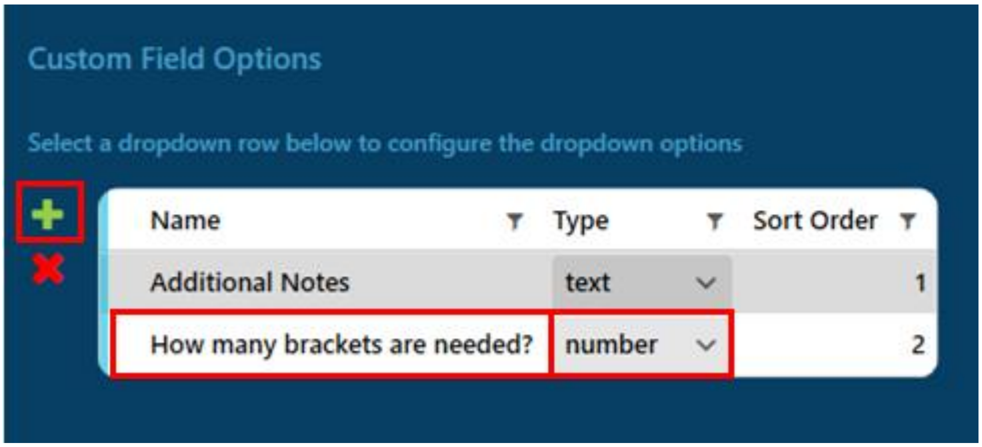
The **Text** field provides users with a single-line text box for data input. To switch to a multi-line text box, incorporate the term "notes" in the field name, which will generate a multi-line box on the form. There are no restrictions on the number of characters that can be entered in a text box.

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.



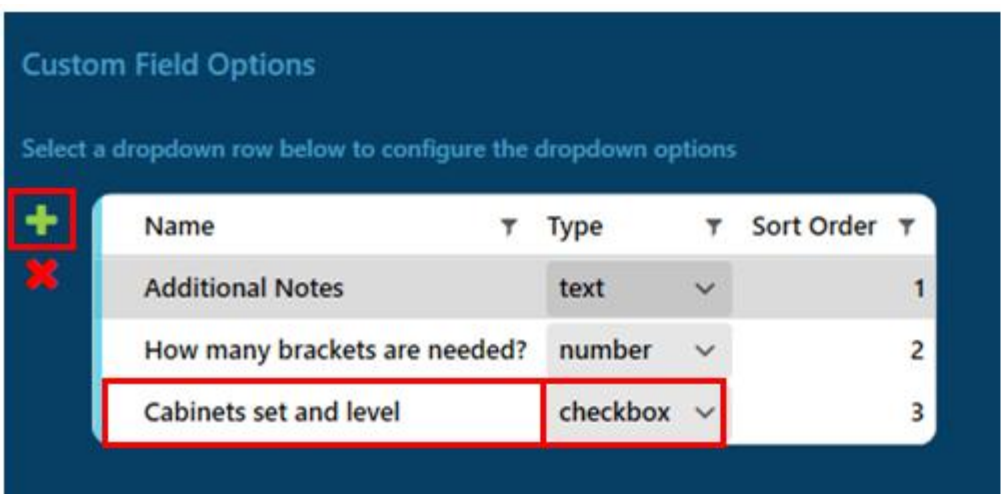
Including a Custom Number Field

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.



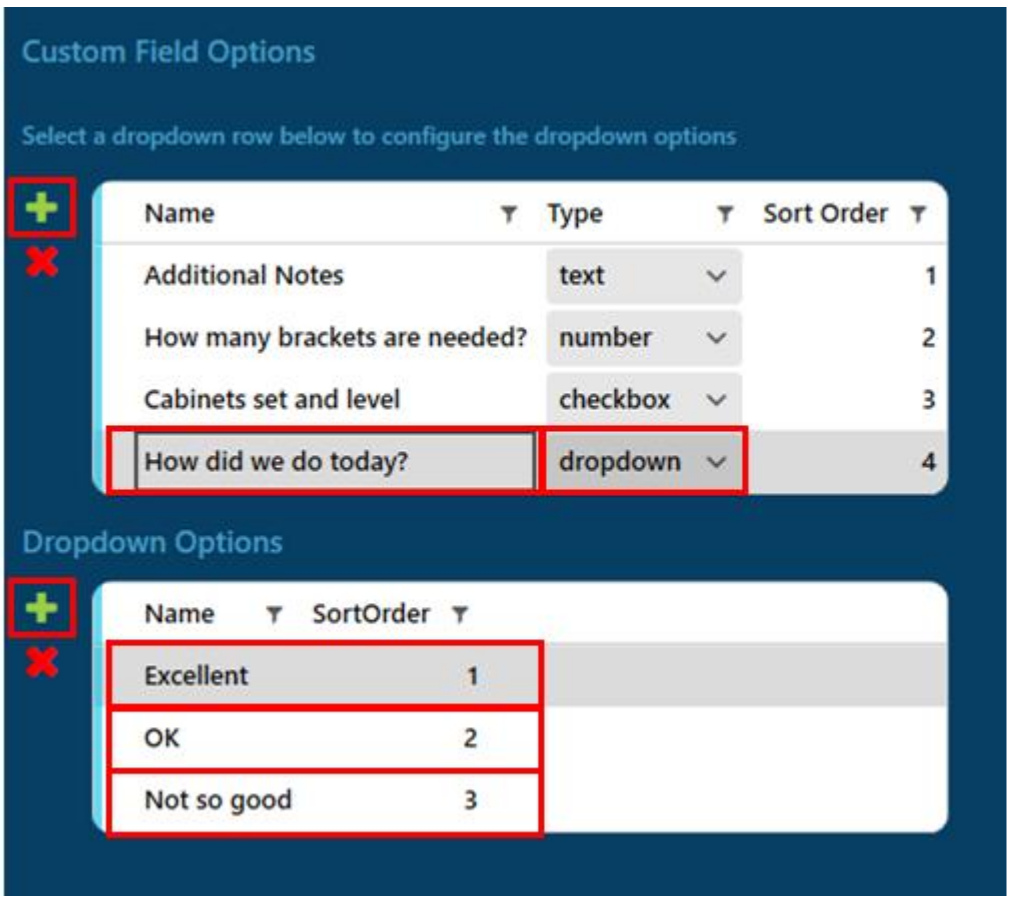
Including a Custom Checkbox Field

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

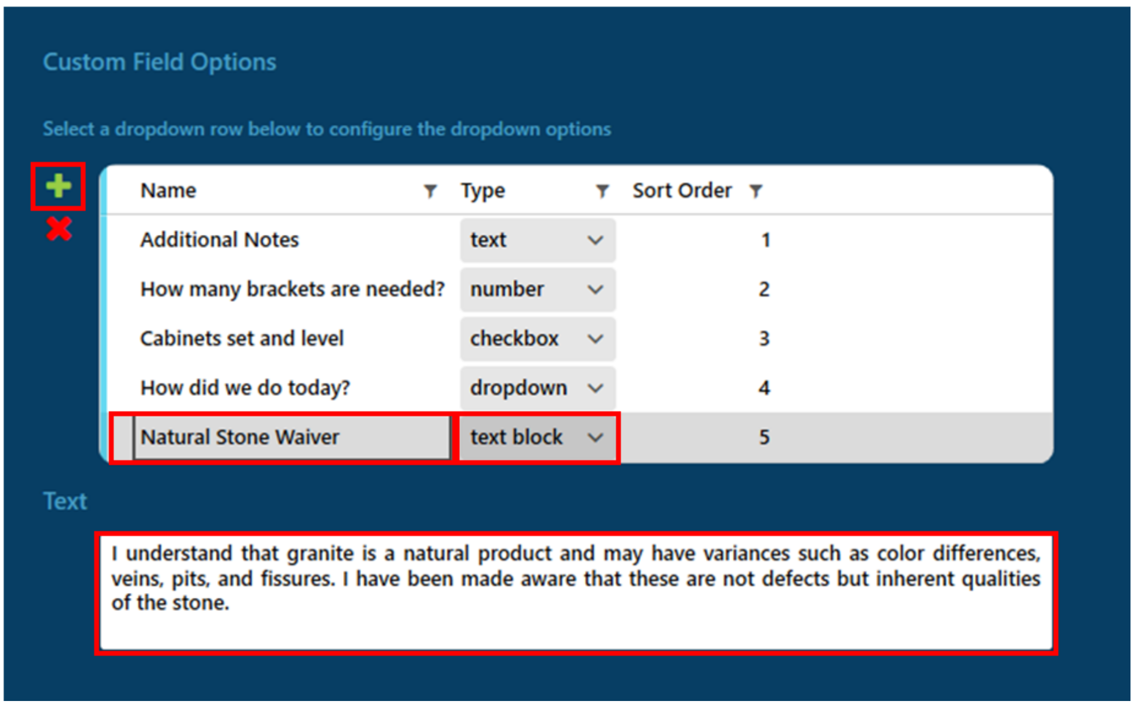
1. Locate the **Custom Field Options** on the right side of your screen.
2. Click the **Green +** to create a Custom Field.
3. Enter the desired name, statement or question for the field.
4. Next select the **Dropdown** field type. This field type allows users to select from a list of predefined responses 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.



Including a Custom Text Block

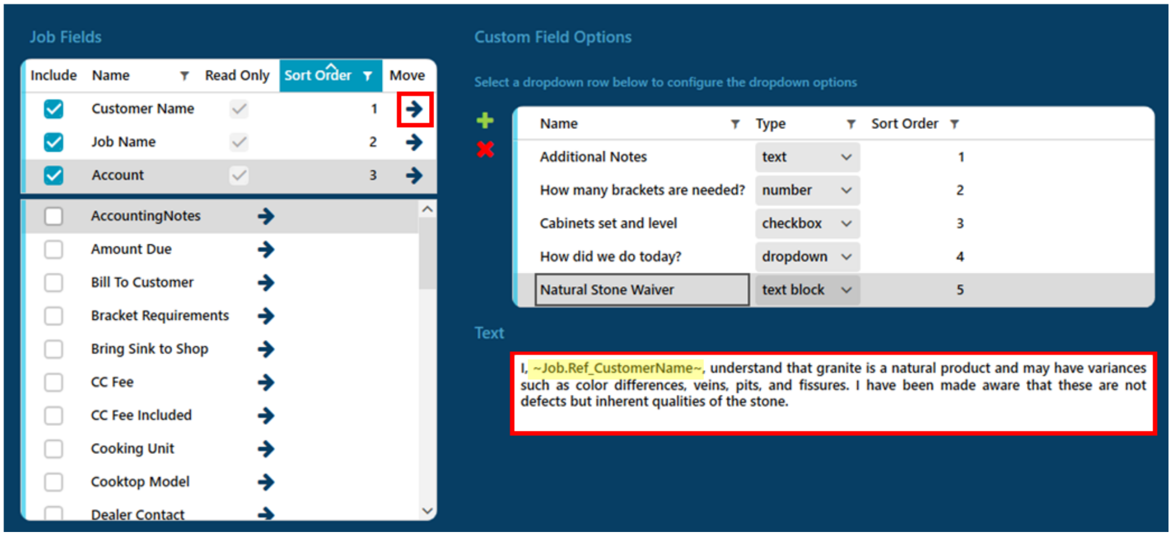
The custom **text block** provides a dedicated area to include waivers, disclaimers, or any additional context you wish. Administrators have the option to add **Customer/Job/Area** fields within the **text block** to create a more personalized message. There are no restrictions on the character limit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



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**.



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.