ActionFlow

ActionForms

User Guide

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![ActionFlow logo]

Navigating the ActionForms Tablet App

This section will review how to navigate and complete a form within the **Tablet App**.

Downloading the ActionForms App to your Tablet

The ActionForms app is available on iOS and Android devices.

1. Go to the **App Store** or **Google Play Store** on your Tablet.
2. Search for the **ActionForms** App.

3. **Download** the App to your Device.

## Logging into the ActionForms App on your Tablet

After downloading the app to your device, you can log in using your ActionFlow credentials. If you need assistance with your **User Name** or **Password**, feel free to reach out to an **Administrator** at your company.

1. Enter your **User Name** and **Password.**
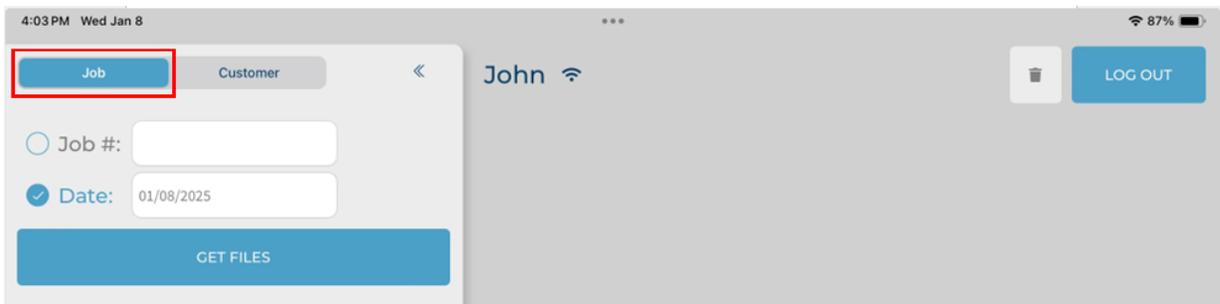2. Click **Login**.
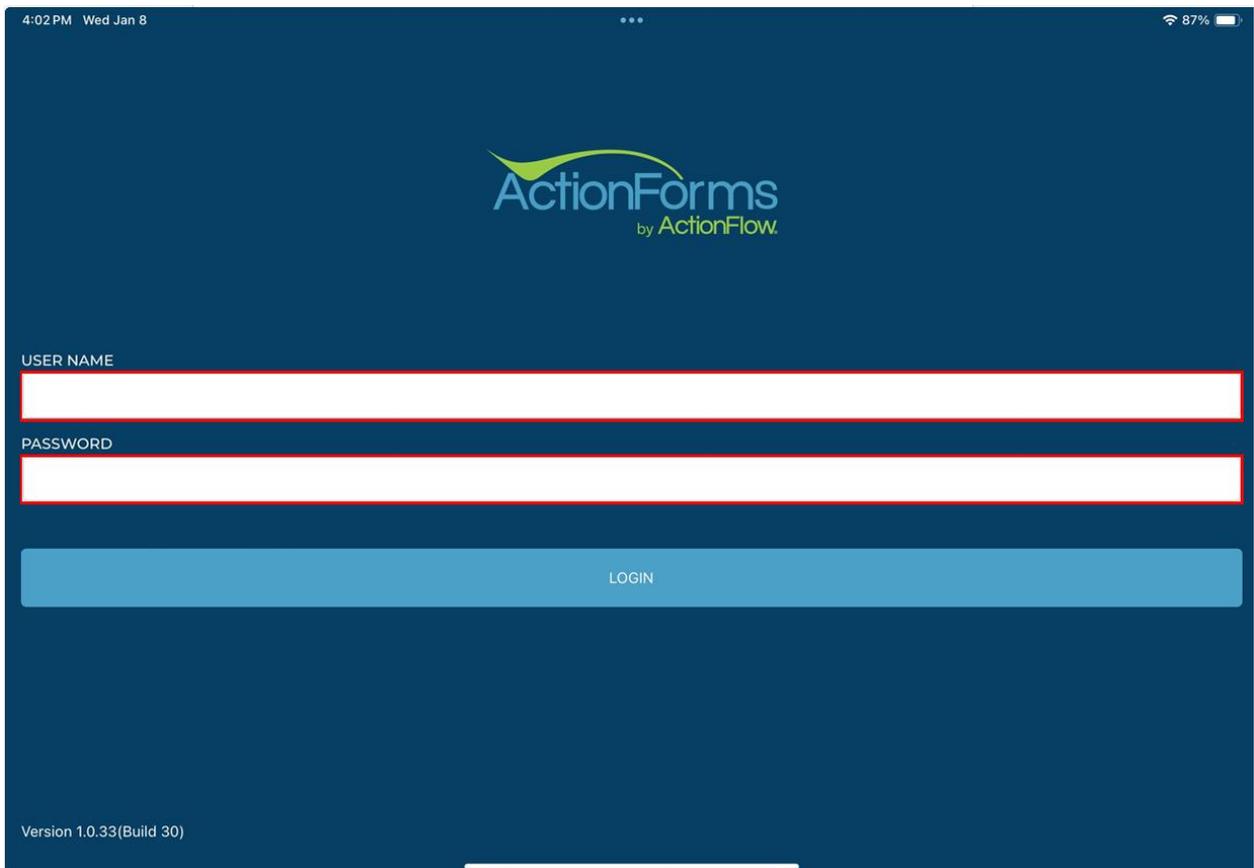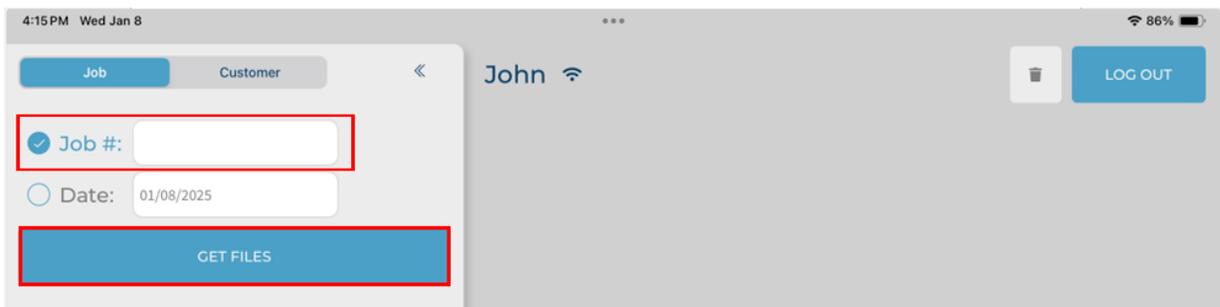
Navigating the ActionForms App on your Tablet

Now that you've logged into the app, let's take a quick tour of the home screen.
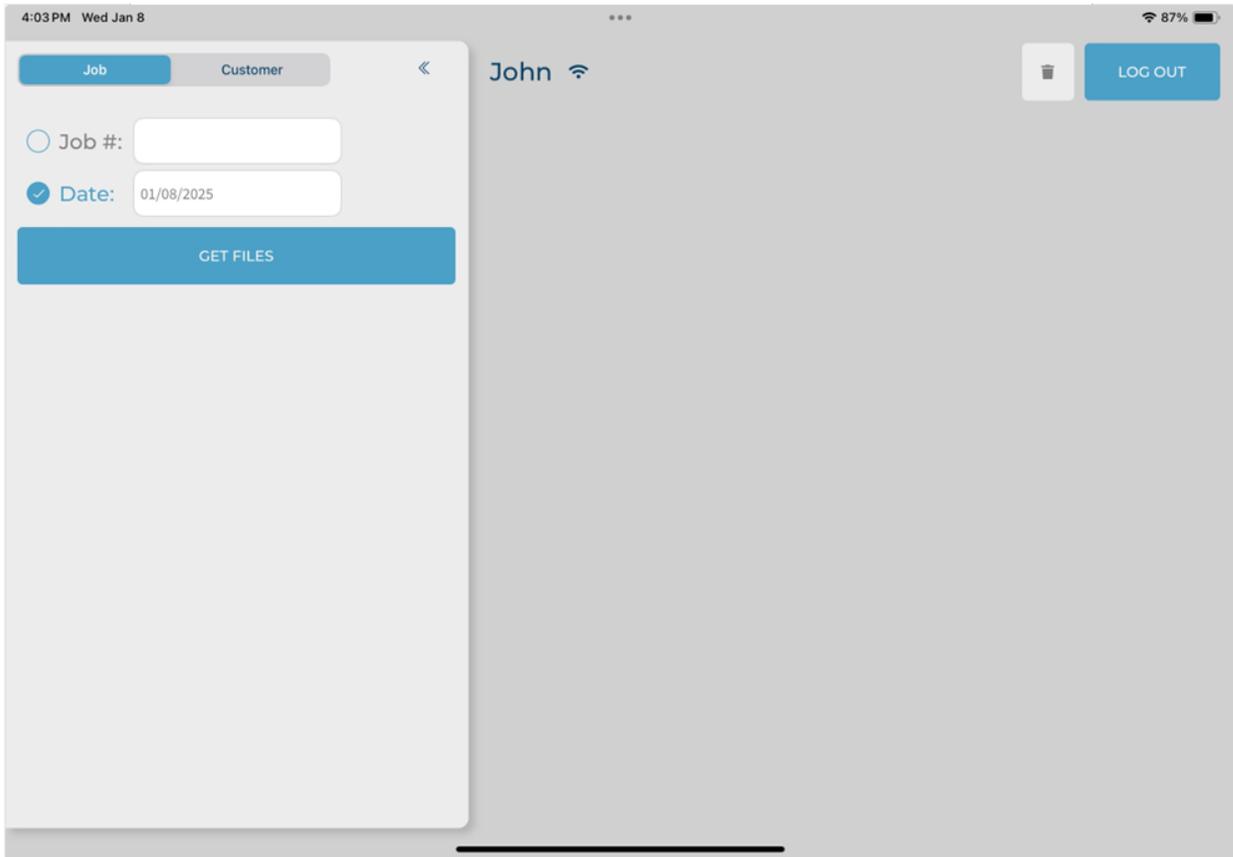
The tabs labeled **Job** and **Customer** at the top of the screen show forms associated with each **Parent Type**. By default, the app will open to the **Job** tab.

To search for forms by **Job Number**, simply enter the job number and click **GET FILES**.

Retrieving forms by **Date** will download all forms for scheduled jobs assigned to the current user on that day.
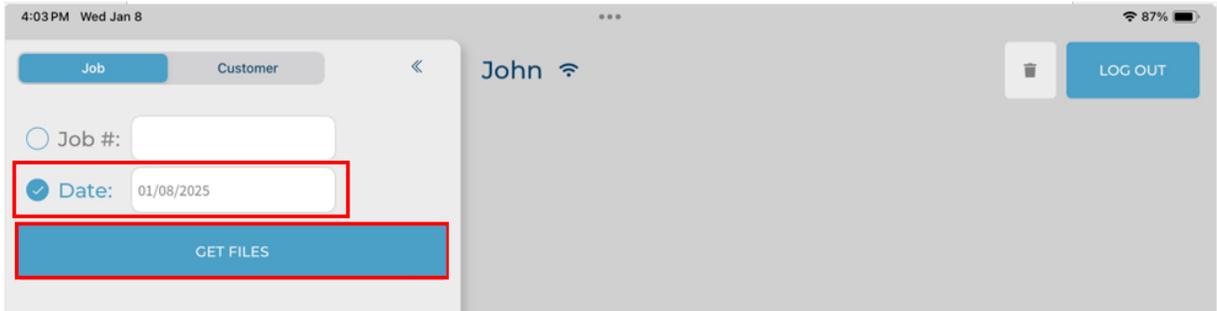

The sidebar controls (**<<** and **>>**) will collapse and expand the sidebar as needed.

Under the **Customer Tab**, search for forms by **Customer Name**. **NOTE:** Forms returned here are linked to customer records only, not job-related forms. For job-specific forms, search by **Job #** instead.
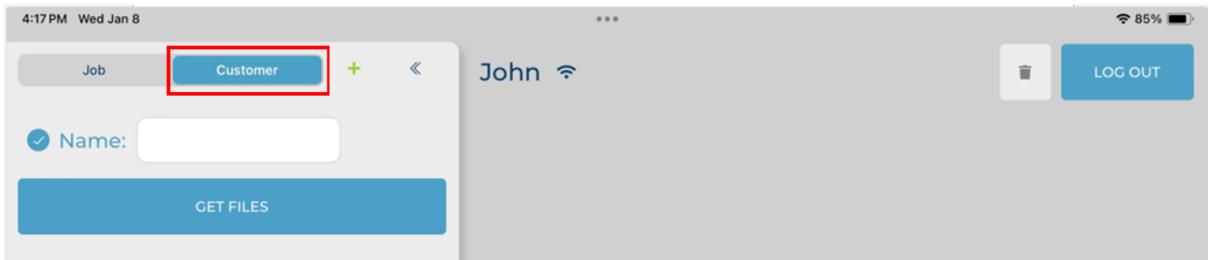
To add a new **Customer** to the database, click the **Green +** button. It's important to note that there must be a form in your Account that allows you to capture the customer information.
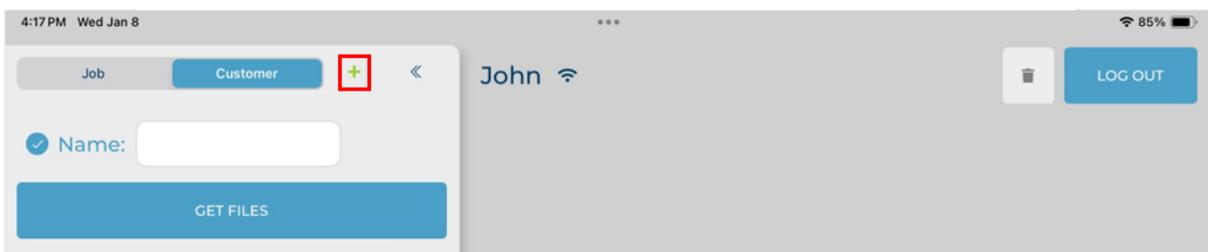
The **Short Name** of the user logged into the system.

Indicates whether a **Wi-Fi** connection is active.

Wi-Fi Connected   Wi-Fi Not Connected

The **Trash Can** will delete all files from the tablet. It is important to note that this action will not affect forms that have been uploaded to ActionFlow.

The **LOG OUT** button will securely log the user out of ActionForms.

Downloading Forms by Job Number

To access forms linked to a particular job, users can search by the job number to download the related forms.

1. Make sure the device is **connected** to the internet.
2. **Check** the box next to **Job #**.
3. Enter the **Job Number** in the designated field.
4. Click **GET FILES** to retrieve the necessary forms.
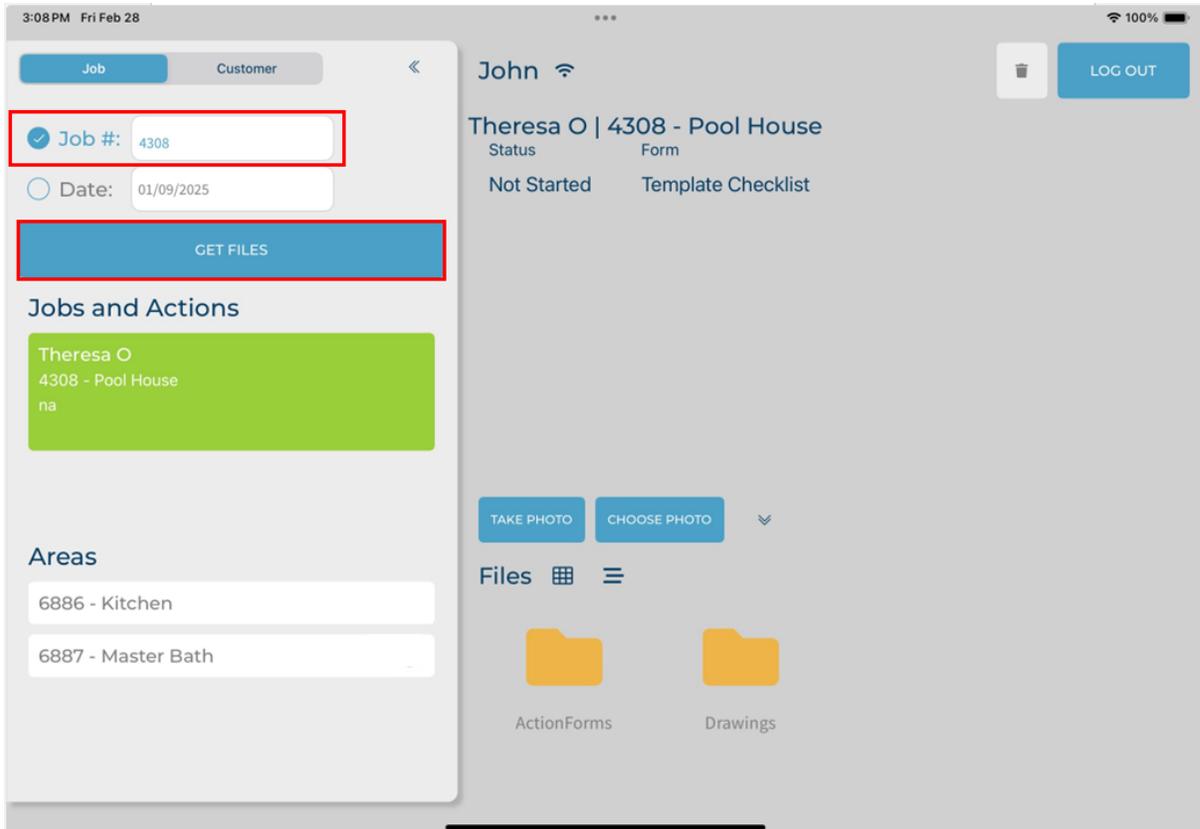
Downloading Forms by Date

To access forms for all jobs linked to a particular date, users can use the **Date** search field to download the forms for the selected date.

1. Make sure the device is **connected** to the internet.
2. **Check** the box next to **Date**.
3. Enter the **Date** in the provided field. The app will default to the current date.
4. Click **GET FILES** to retrieve all jobs and associated forms.
5. The list of jobs will populate in the **Jobs and Actions** area.
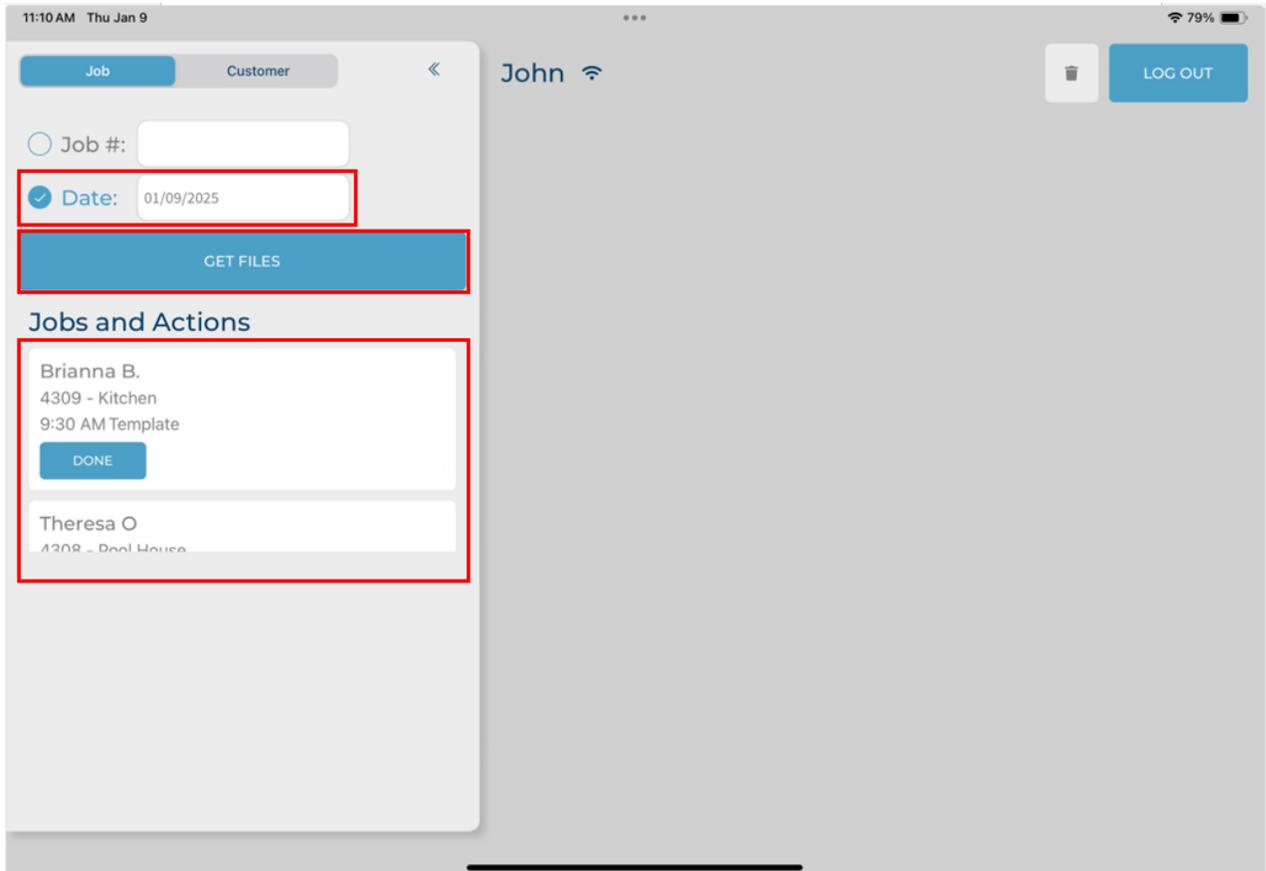
## Navigating Job Forms Downloaded to the Tablet

Once the jobs have been downloaded to the Tablet, you **don't need an internet connection** to access and complete the forms. You'll find all jobs under the **Jobs and Actions** section. The **Customer Name** will be displayed first, followed by the **Job Number** and **Name** and finally the **Scheduled Action** and **Time** if downloaded by **Date**.
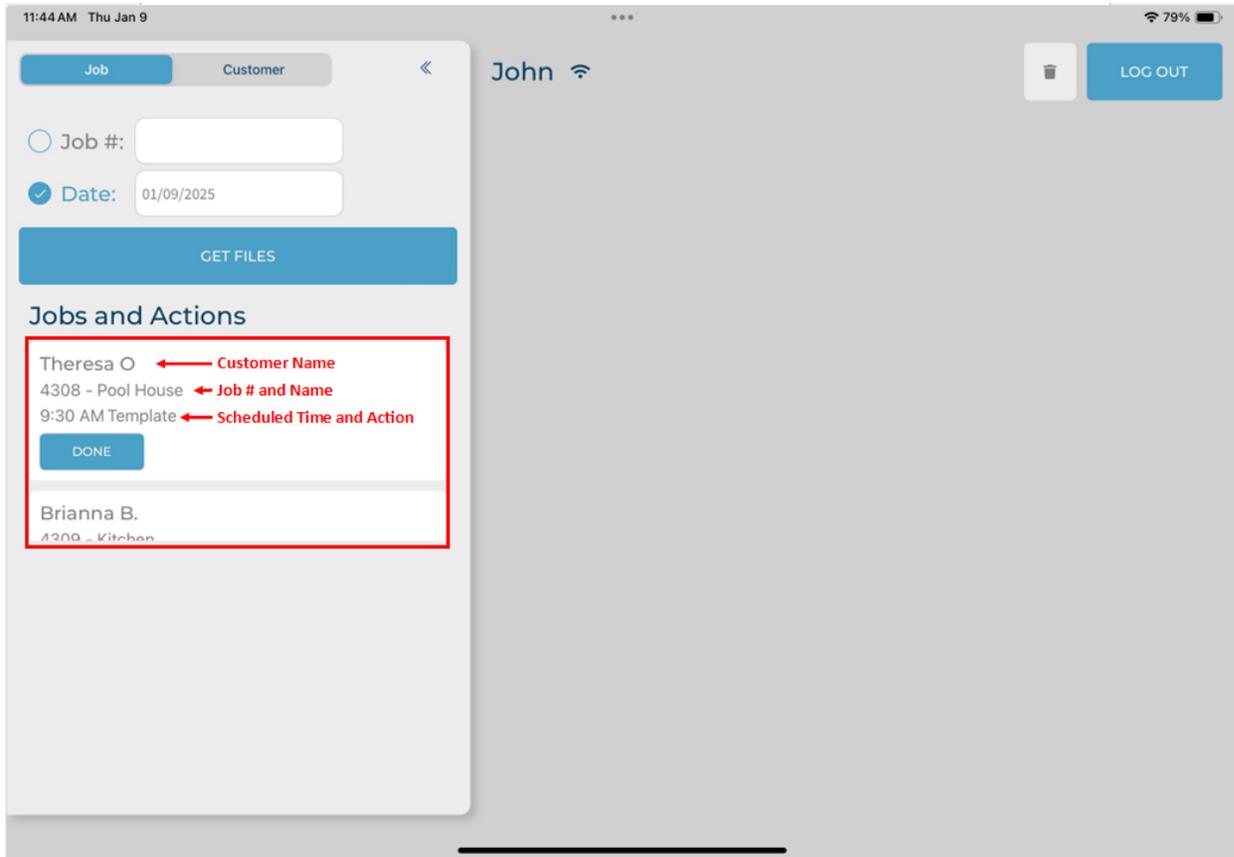
When forms are downloaded by **Date**, users can complete the associated **Scheduled Action** within ActionFlow by clicking the **Done** button. This will complete the **Scheduled Action** tied to the form. For more information on completing **Actions** in the app, visit this section of this guide.
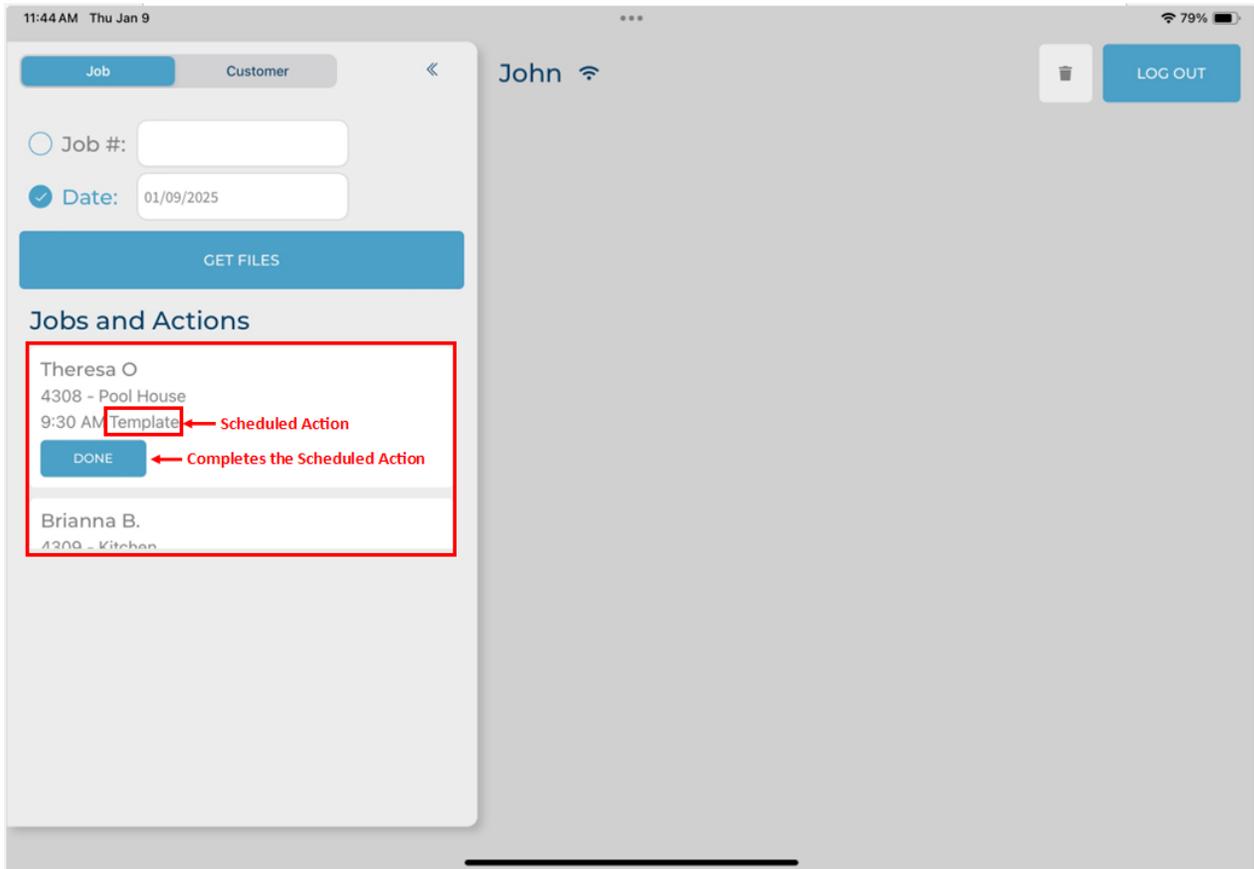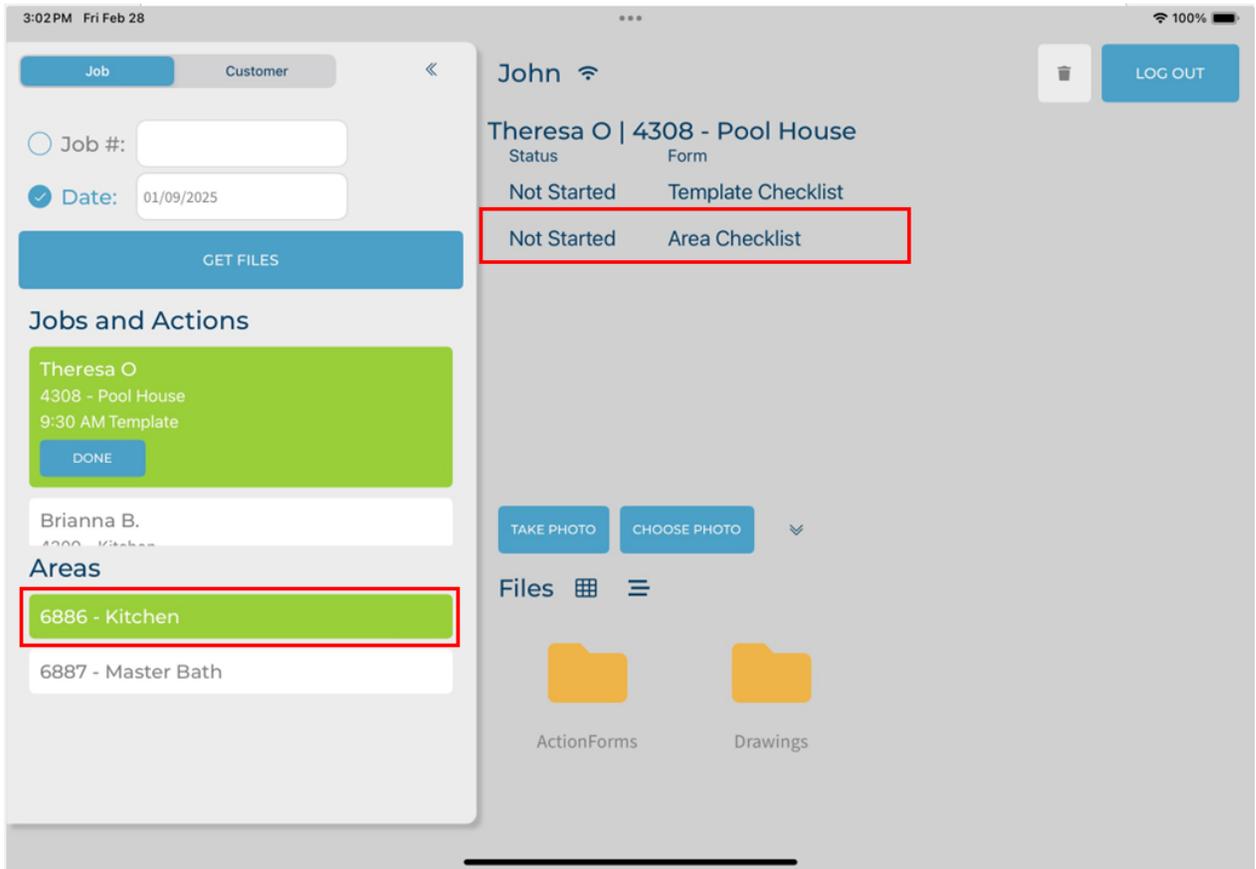
Upon selecting a job, which will be highlighted in green, the associated **Areas** will be displayed under the **Areas** section.
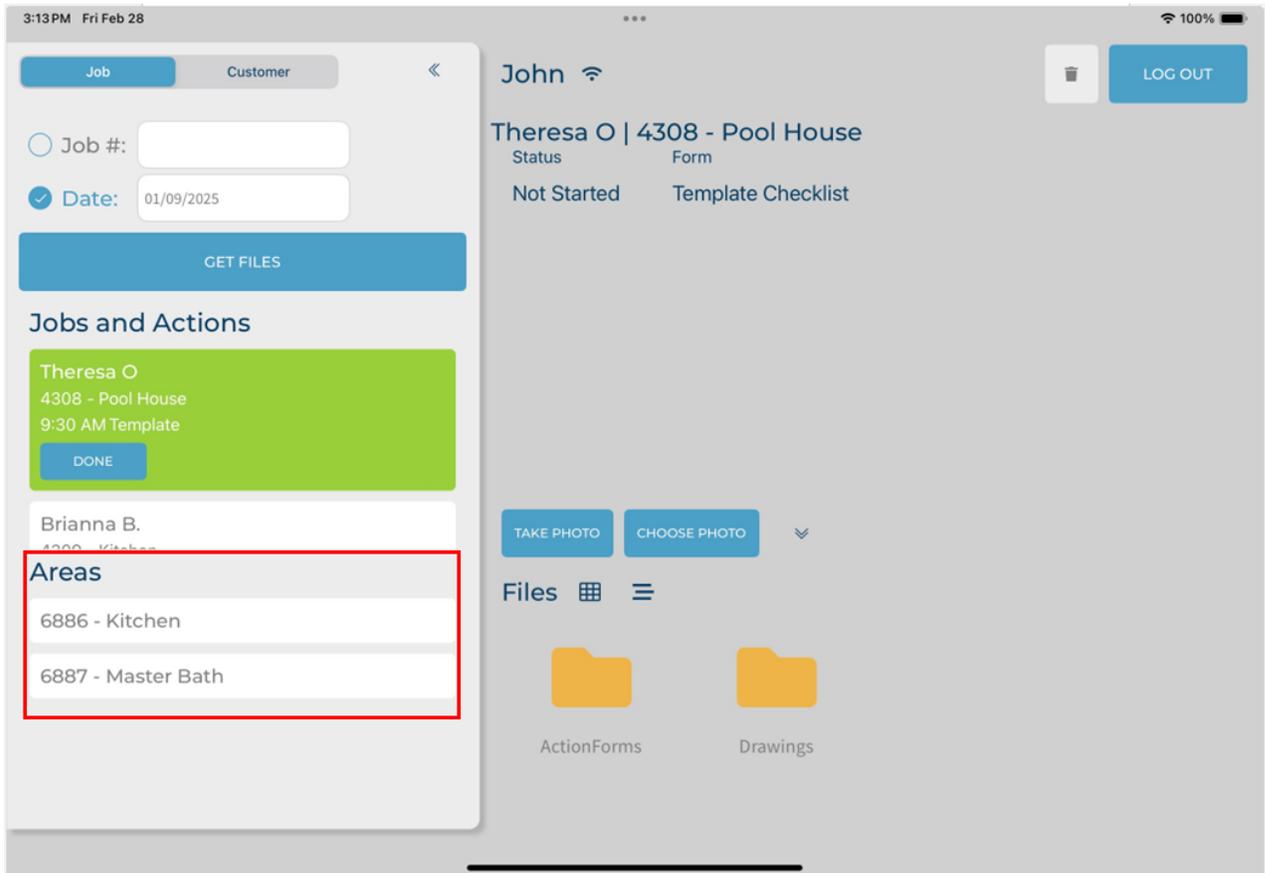
To the right, you will see information about the selected **Job** and all the forms linked to it.
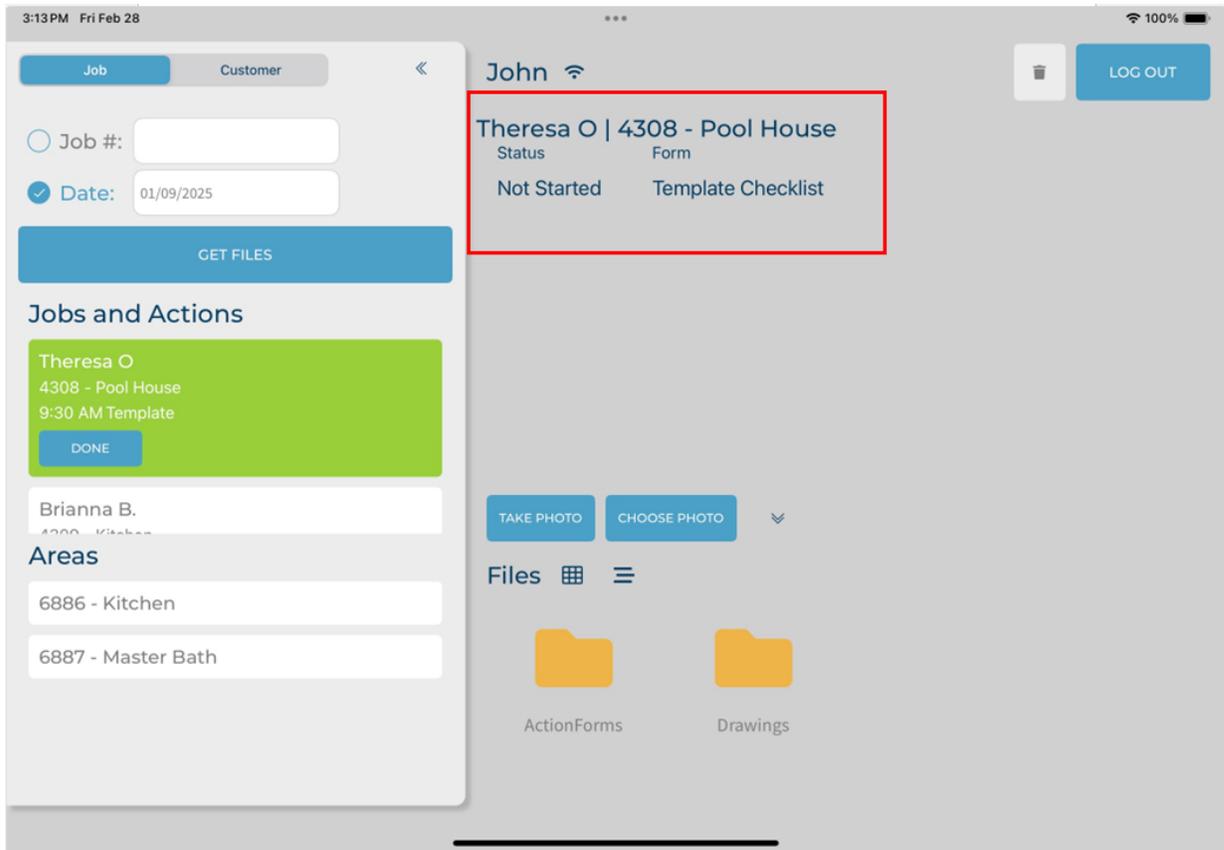
Forms specific to the **Area** must be viewed by selecting the desired **Area**. This view will show both **Job** AND **Area** forms.
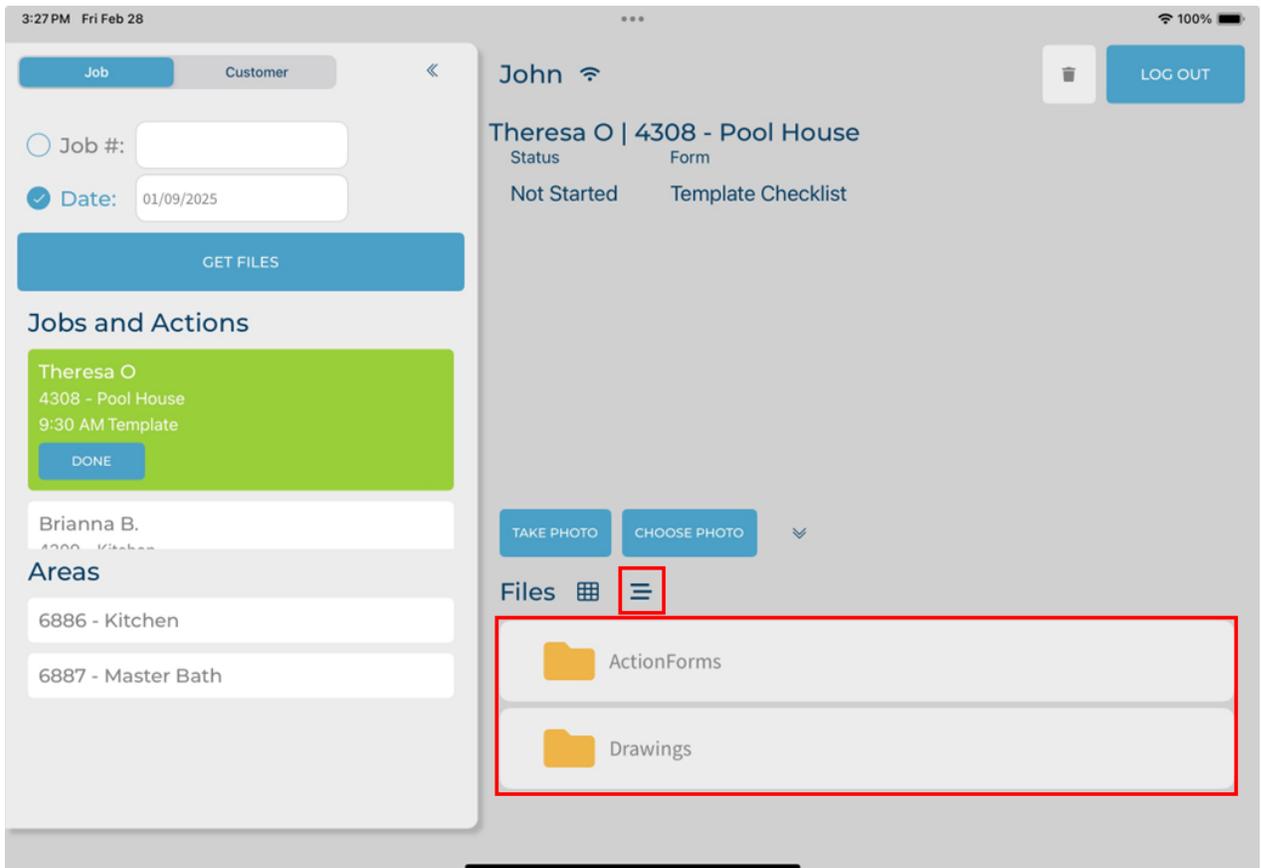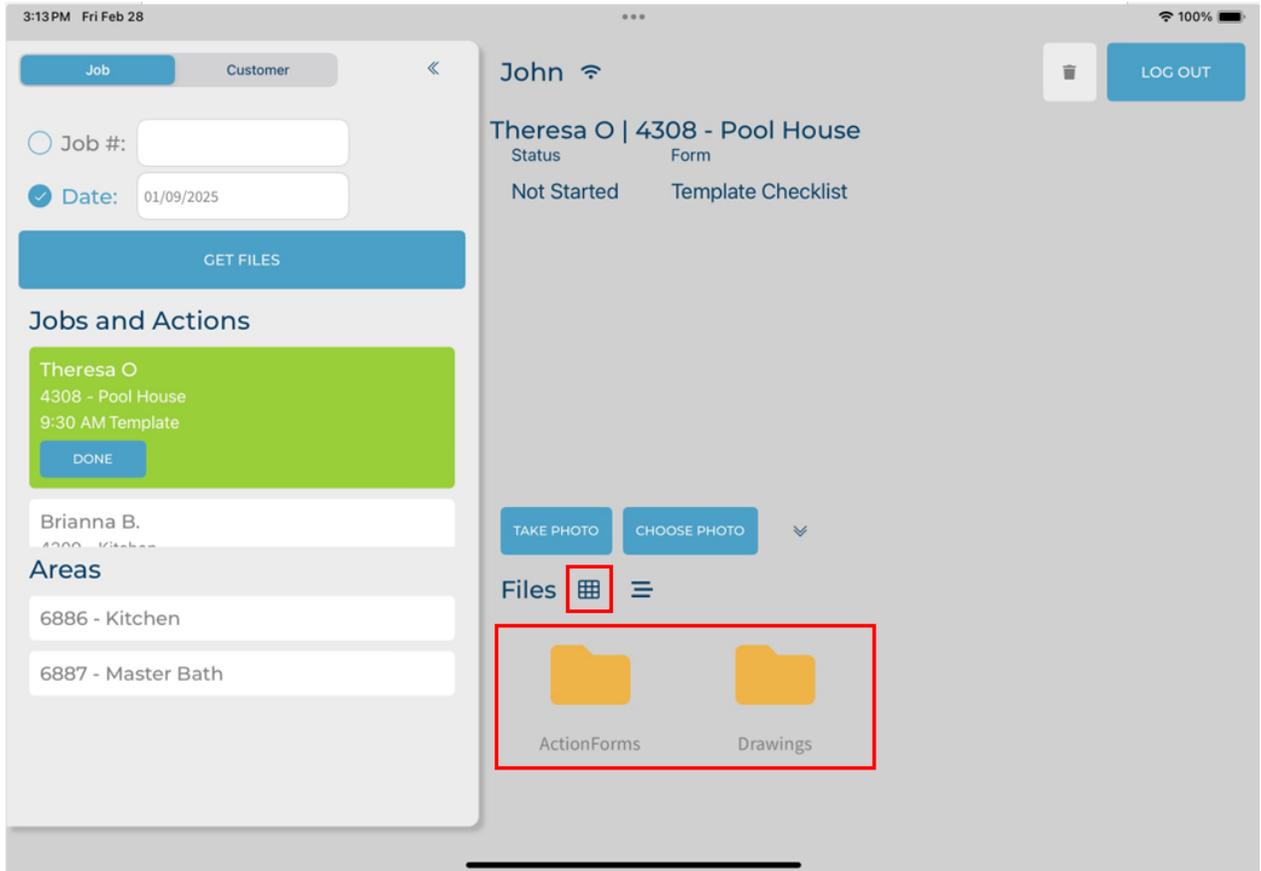
Below the available forms, there are options for managing files and adding photos to the **Job**. Users can capture a new photo using their device or choose from previously taken photos to include in the **Job Files**.
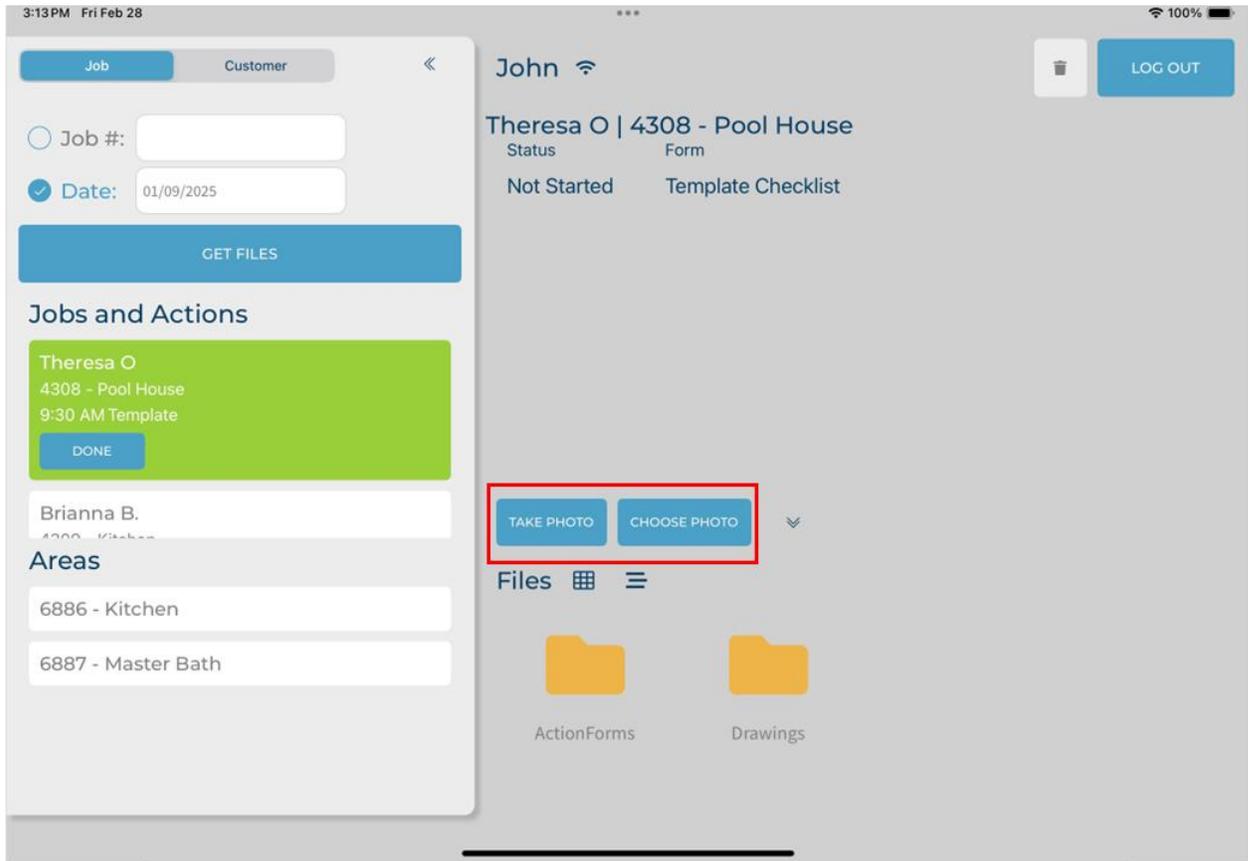
Users can also collapse or expand the Files area using the **<<** and **>>** icons.
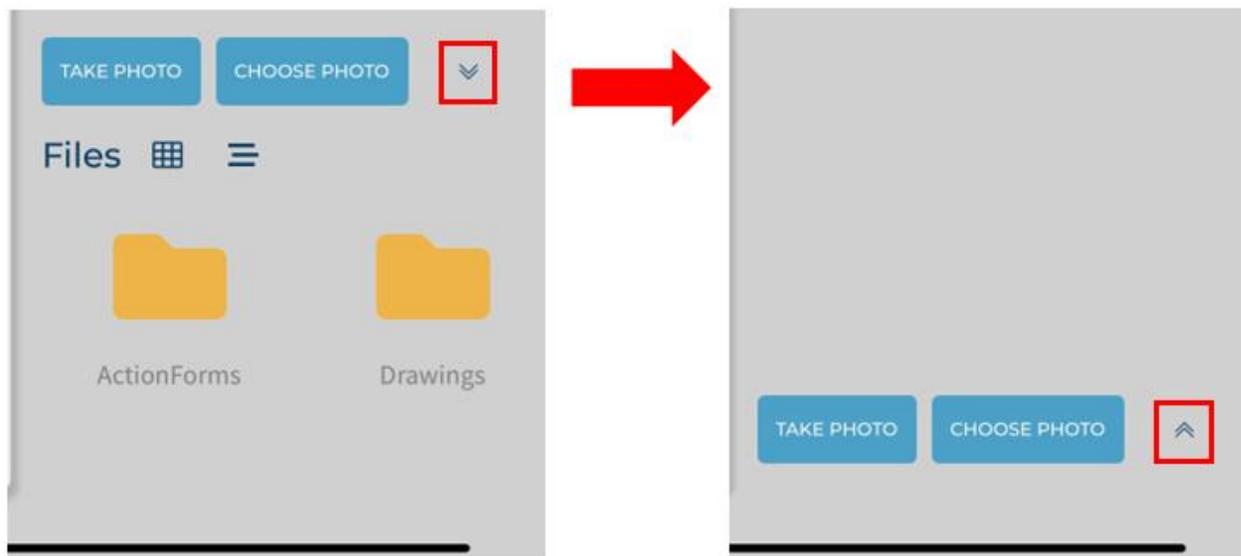
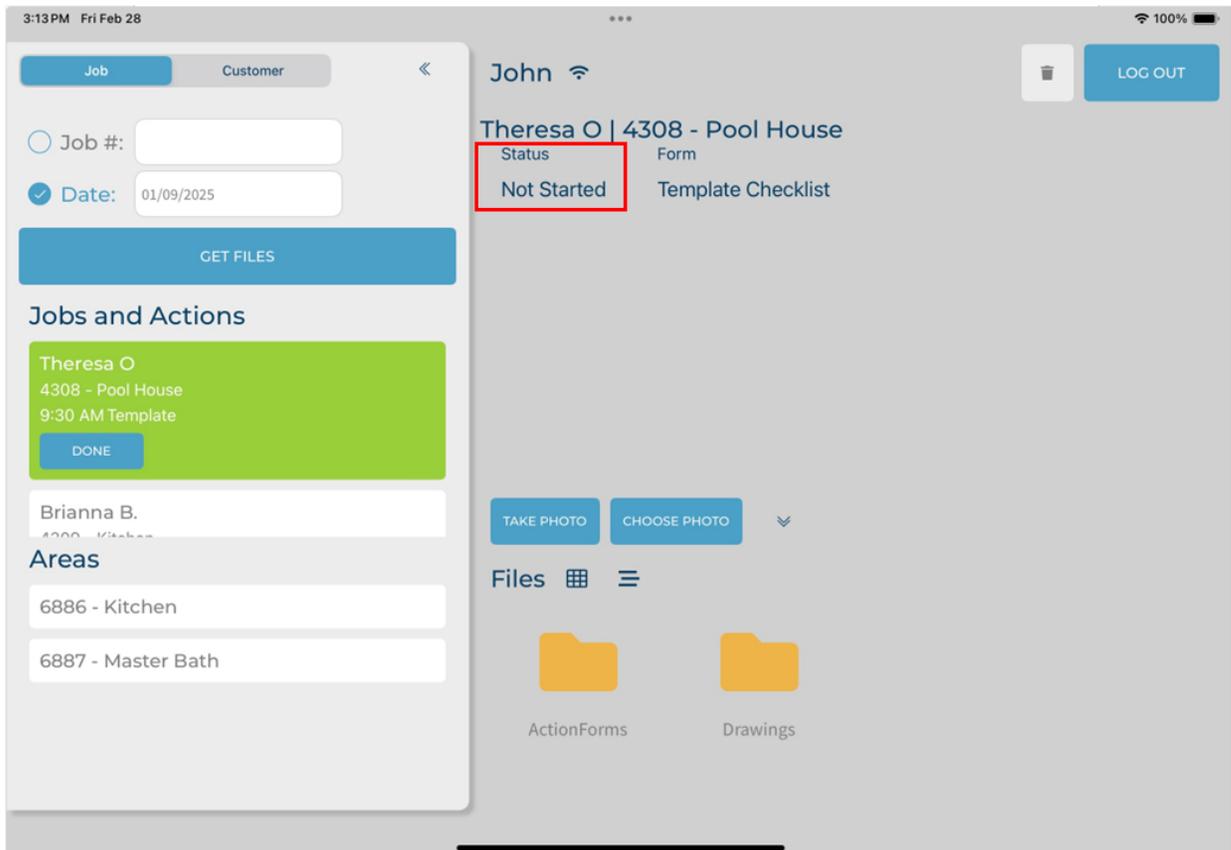Toggling between **folder** and **list** view is simple with the grid and line icons.

Understanding Form Statuses

To help keep track of the form's progress, there are different statuses to indicate the stage of the form.
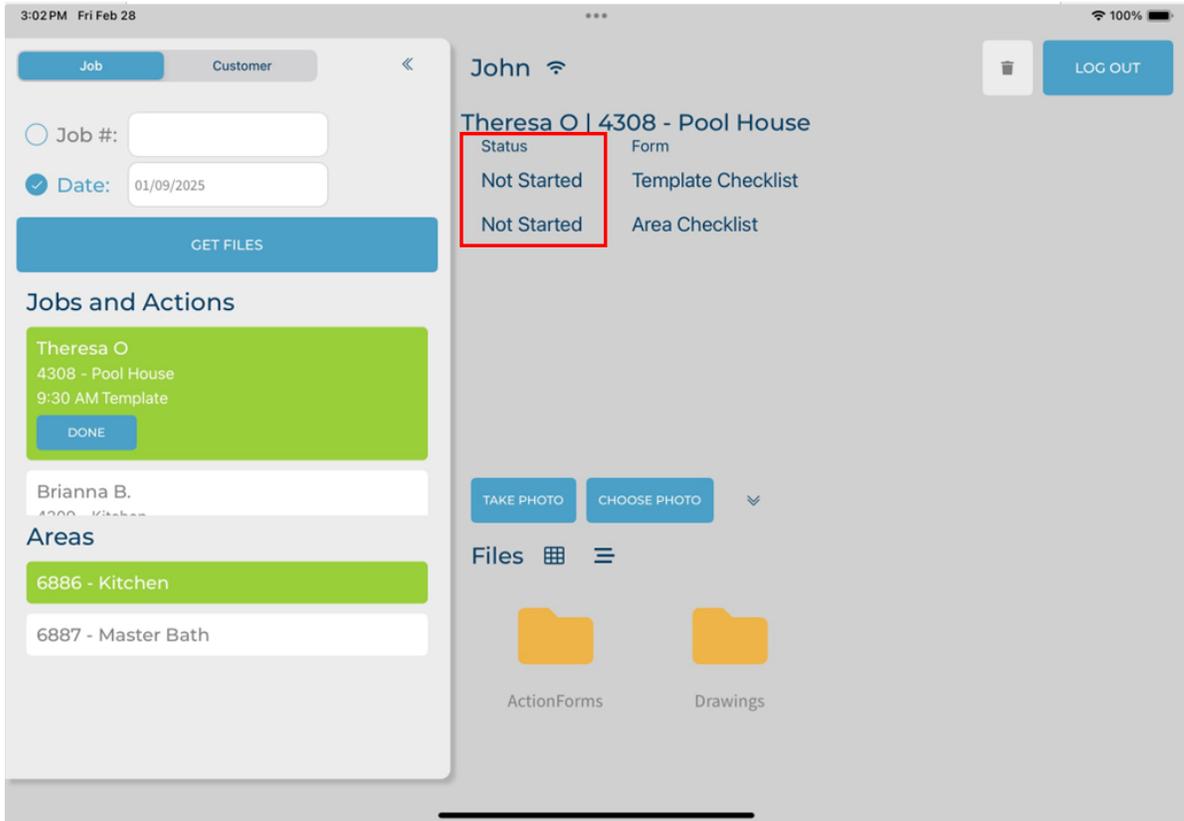
Not Started Status

The **Not Started** status means the form has not been started yet.
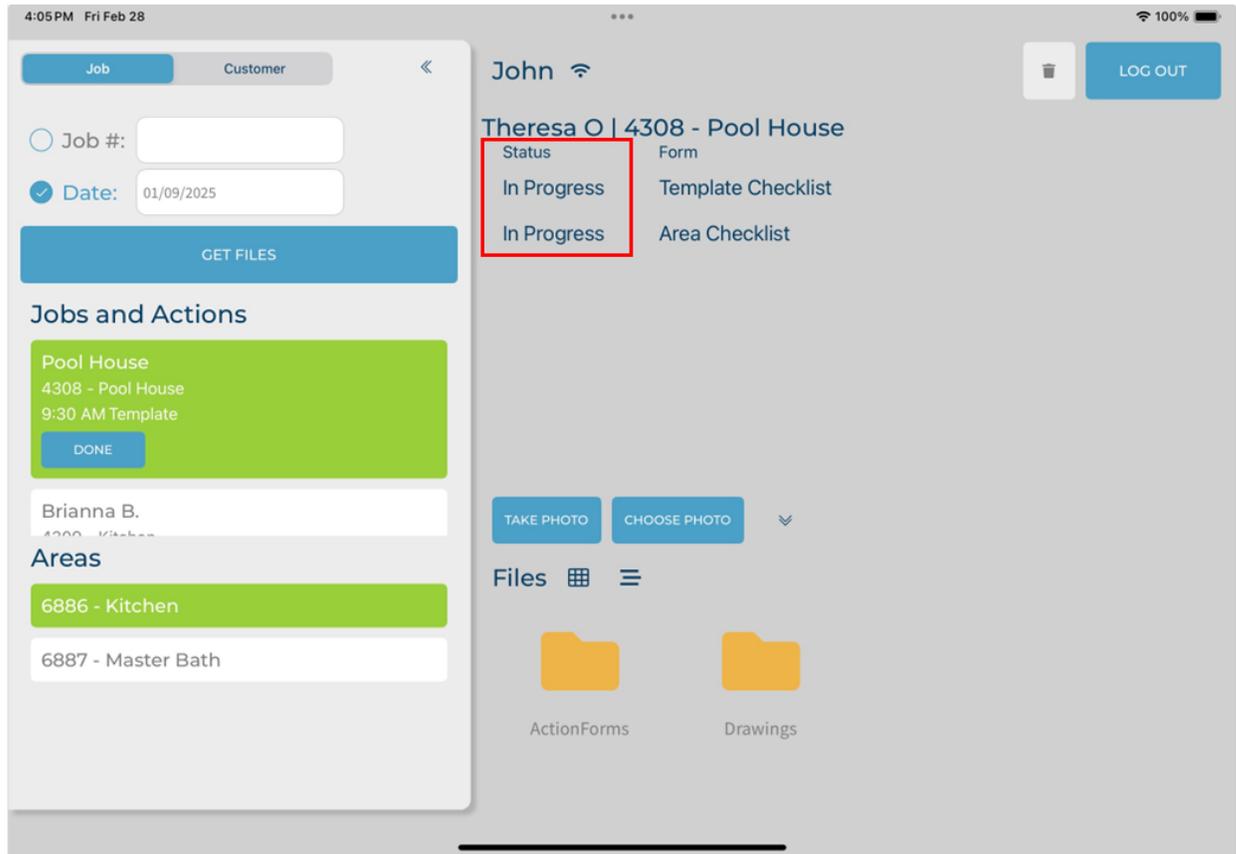
View when **Job** is selected:

View when **Area** under a **Job** is selected:

In Progress Status

The **In Progress** status shows the form has been accessed and saved but not completed.

The **Complete** status indicates the form has been completed but not yet uploaded. Take note of the checkmarks located to the right of the **Job** and **Areas**, indicating the completion of all forms.

Note: Users will see the **Complete** status only if there is no internet connection. The **Wi-Fi** icon will display a line through it, along with the number of files waiting to be sent.
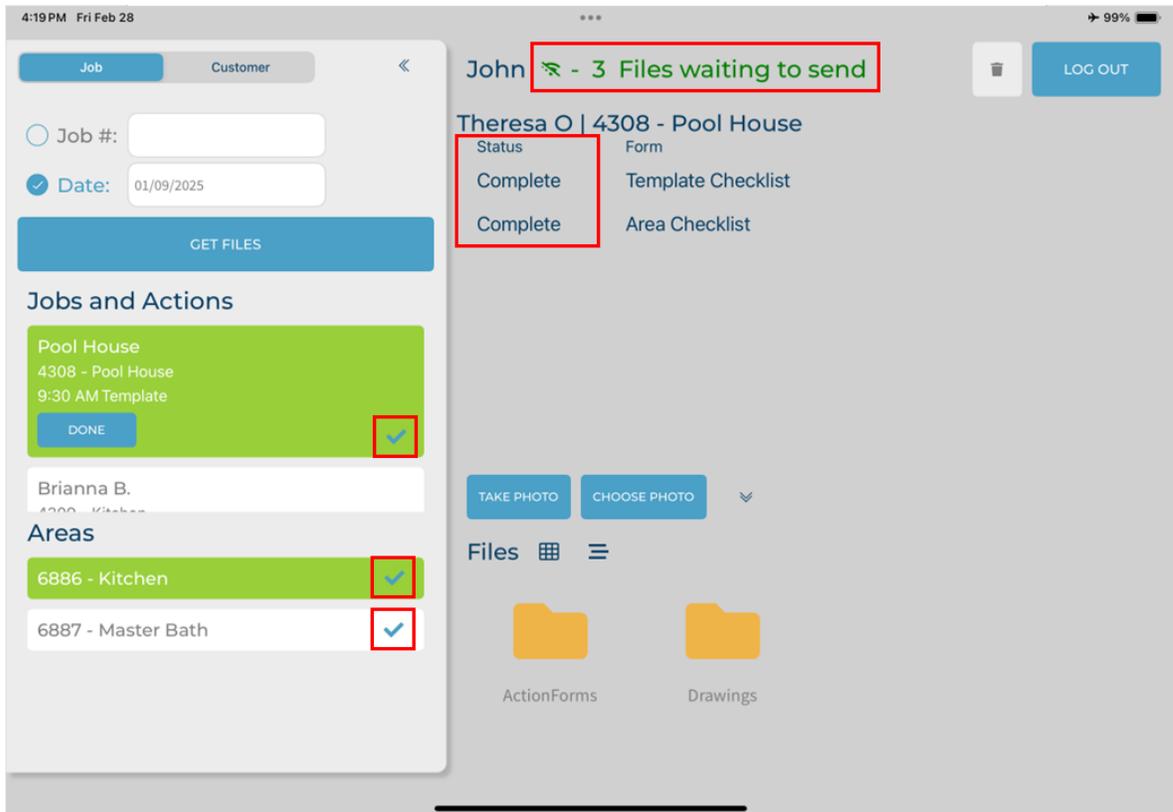
If all **Job** forms have been **Completed**, but there are still open area forms, the checkmark will not be displayed next to the **Job** until all **Area** forms are **Completed**. This serves as in indicator that there are still pending forms to complete.
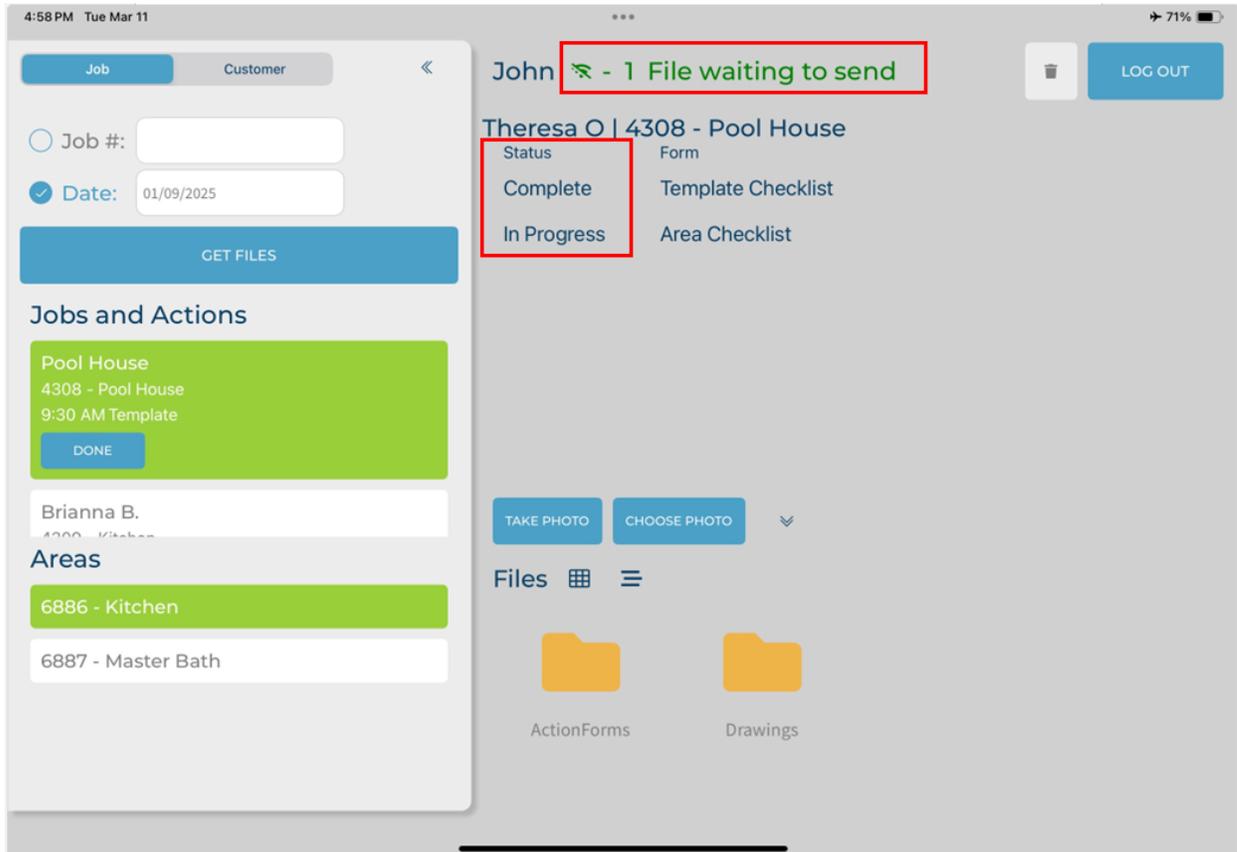
Uploaded Status

The **Uploaded** status denotes the form has been successfully uploaded to ActionFlow.
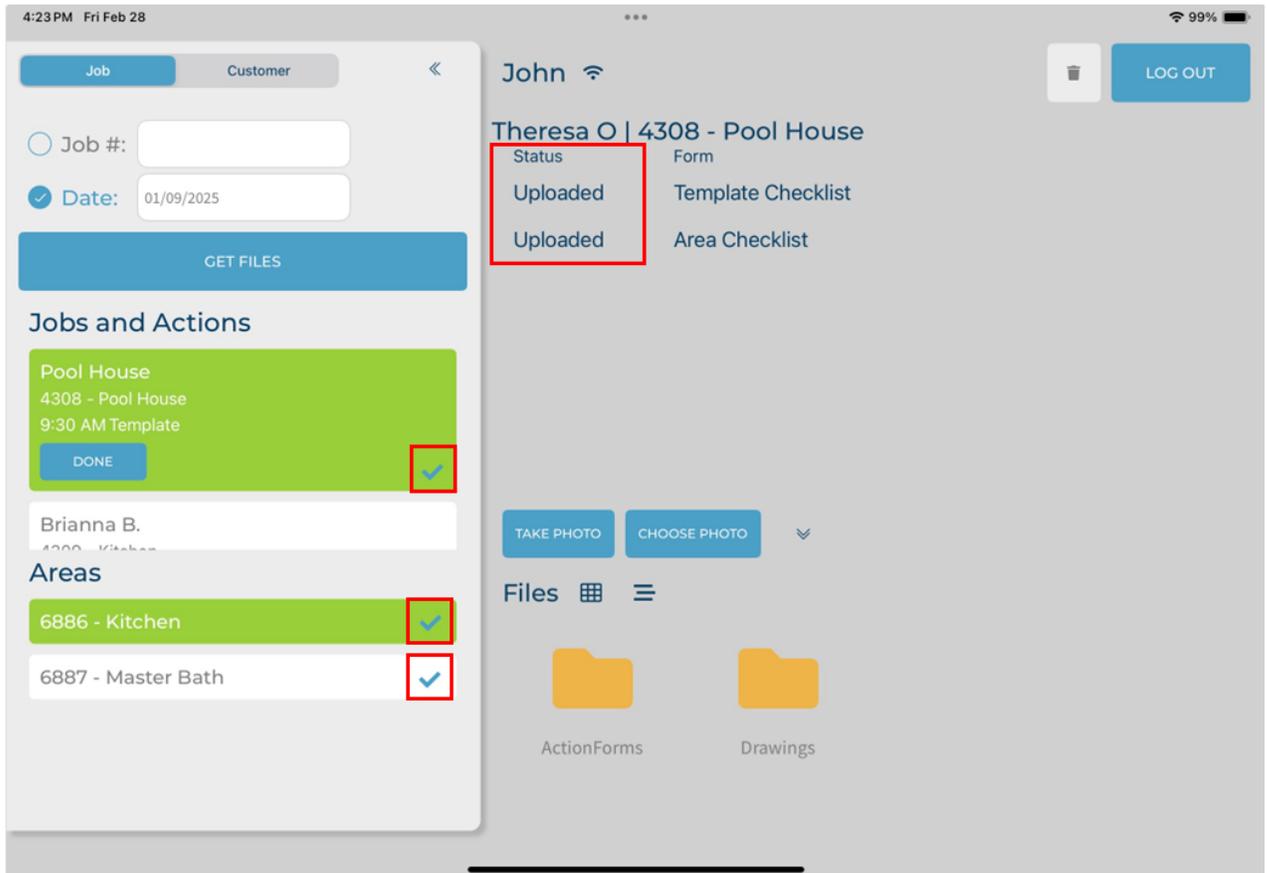
If all **Job** forms have been **Uploaded**, while there are still open **Area** forms, the checkmark will not show next to the **Job** until all **Area** forms are completed. This indicates that there are still pending forms to be **Completed**.
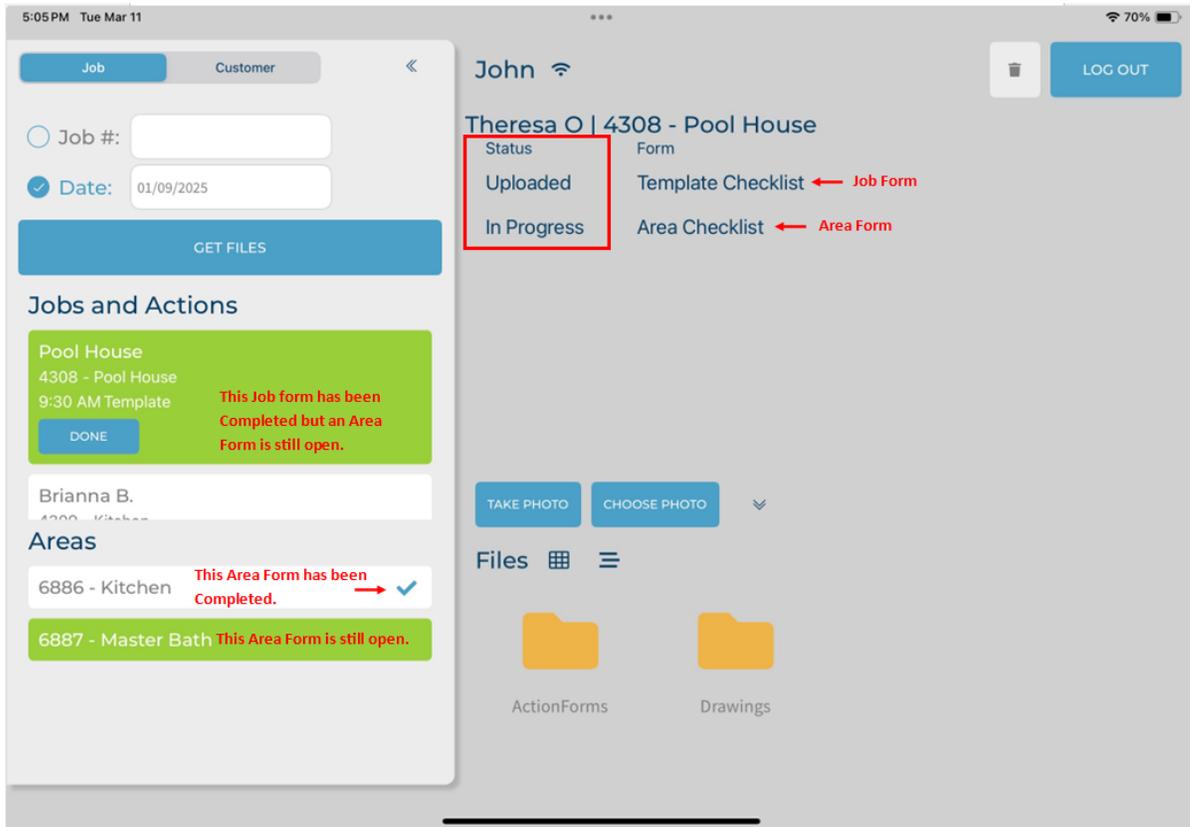
Accessing and Completing Forms Downloaded to the Tablet

To begin filling out a form downloaded to the Tablet, simply click on the form name to open it and get started.
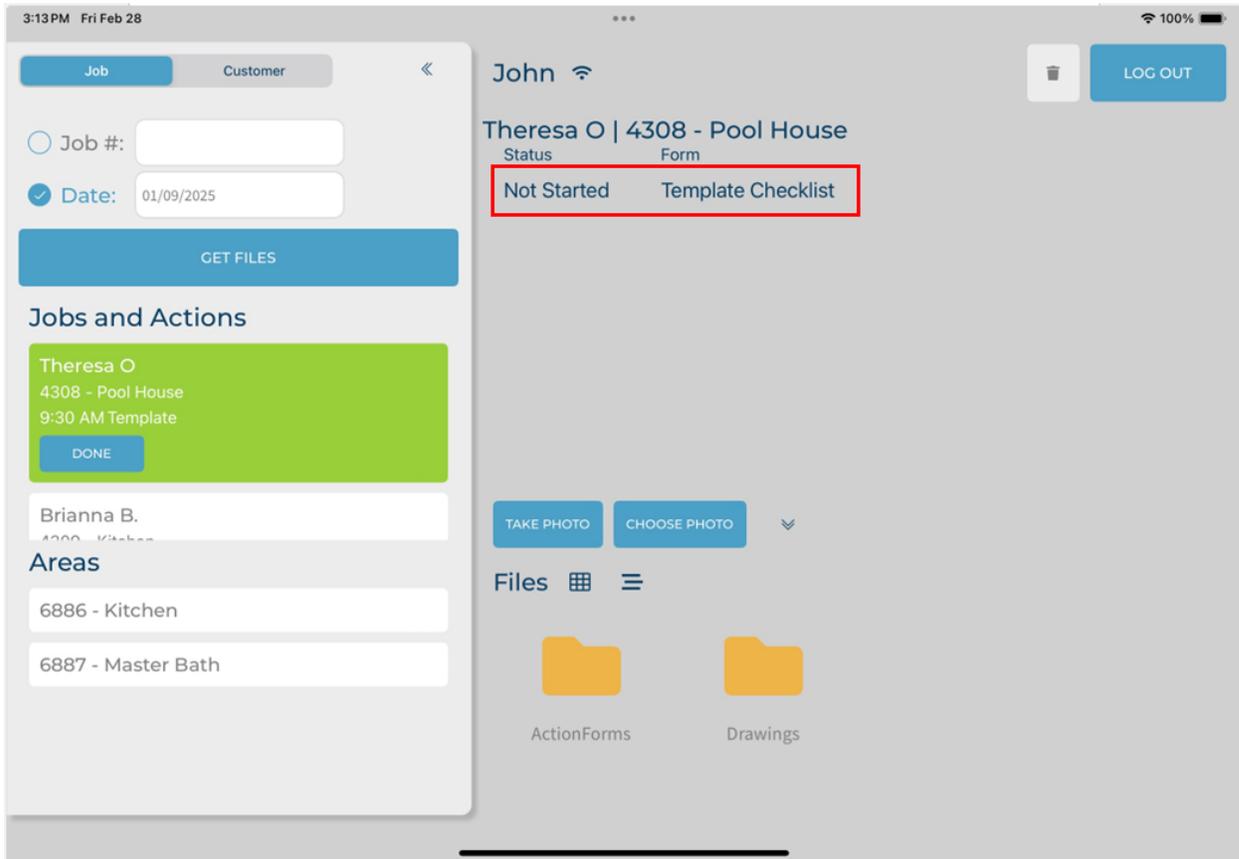
When the form opens, users can scroll through the form on the left to verify and input information. Clicking on the **Save Progress** button at the top will only save the form's progress for future reference. It is important to note that clicking **Save Progress** will not complete or upload the form but will change its status to **In Progress**, allowing users to return and complete it later.

In a **Job Form**, users will have access to all associated **Area** drawings which are shown in the top right-hand corner of the app. Clicking on any drawing will enlarge and display the image to the right of the form.
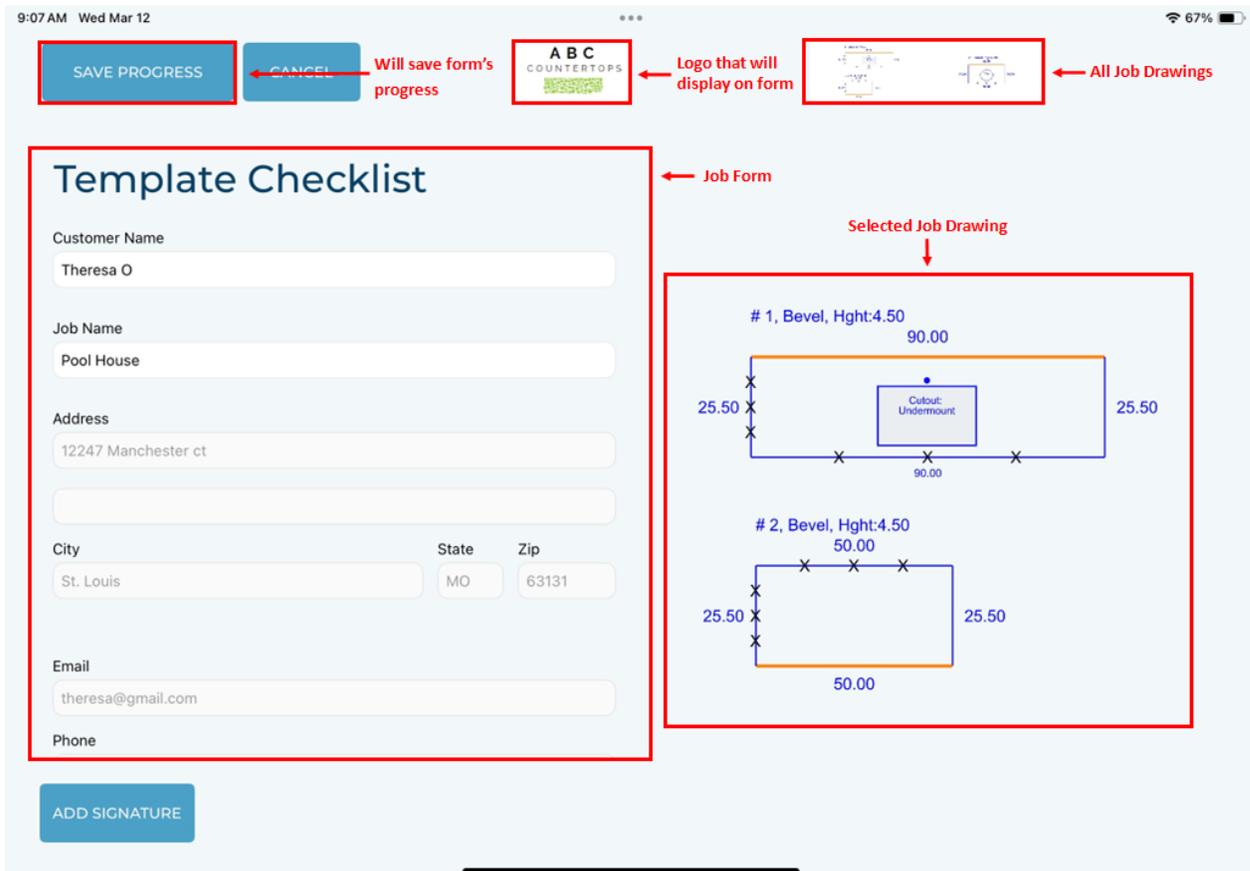
In an **Area Form**, you will only see the drawing associated with that **Area**.

If the **Customer Name**, **Job Name** and/or **Area Name** are included on the form, these fields are set as **Read-Only** and cannot be edited.

If the form includes the **Address**, **Phone Number** and/or **Email** fields, your Administrator will determine whether these are Read-Only or Editable on the form. When set as **Read-Only** on the backend, these fields will appear greyed out on the form.

Next, any **Job** or **Area** information retrieved from ActionFlow will be shown. While most of these may not be editable, users can click on a field and will see a cursor if it can be modified. **Read-Only** fields will not respond to clicks. Note that any changes to these fields will automatically update **ActionFlow**.

Furthermore, **Line Items** and/or **Inventory Items** within an **Area** Form will be displayed below the **Area Details** section in a **Read-Only** format.
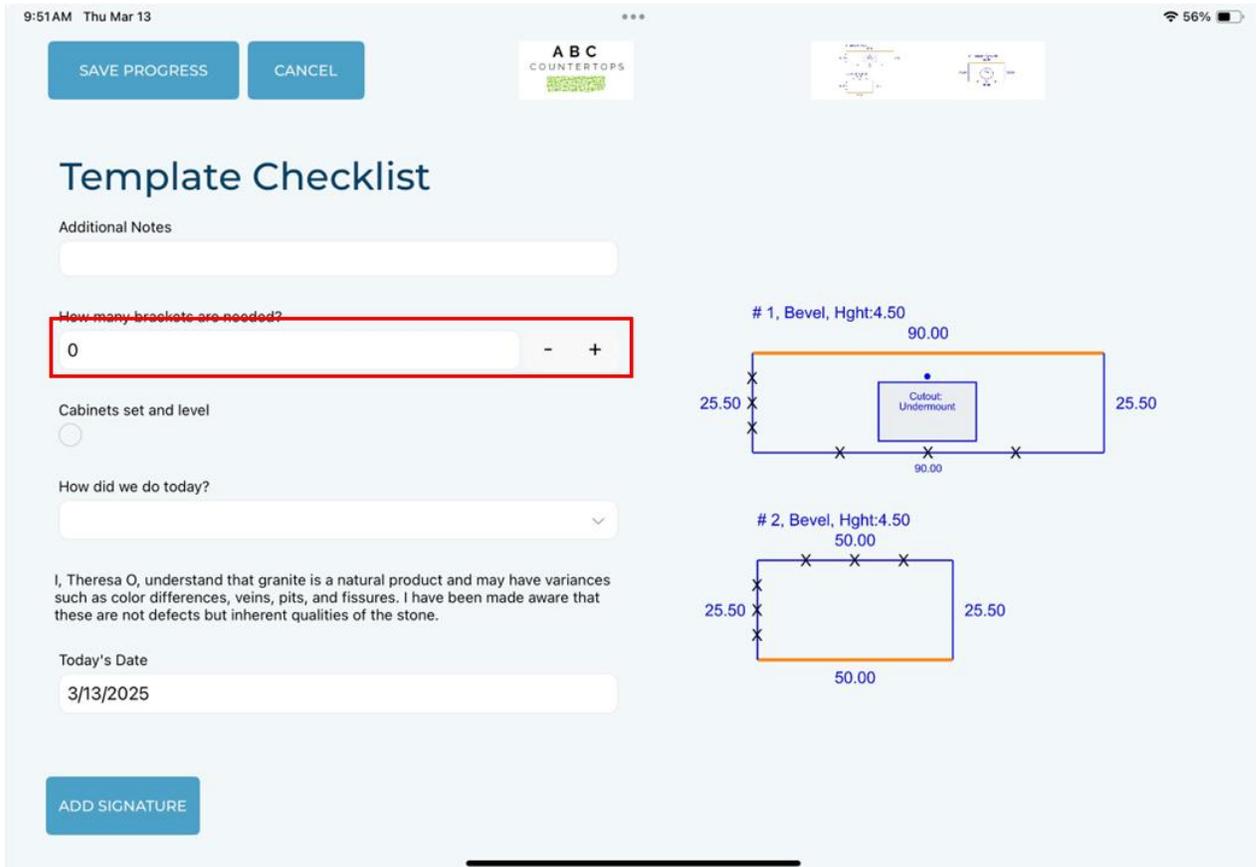
When **Custom Field** options have been added by your Administrator, various input types allow for different forms of data entry.
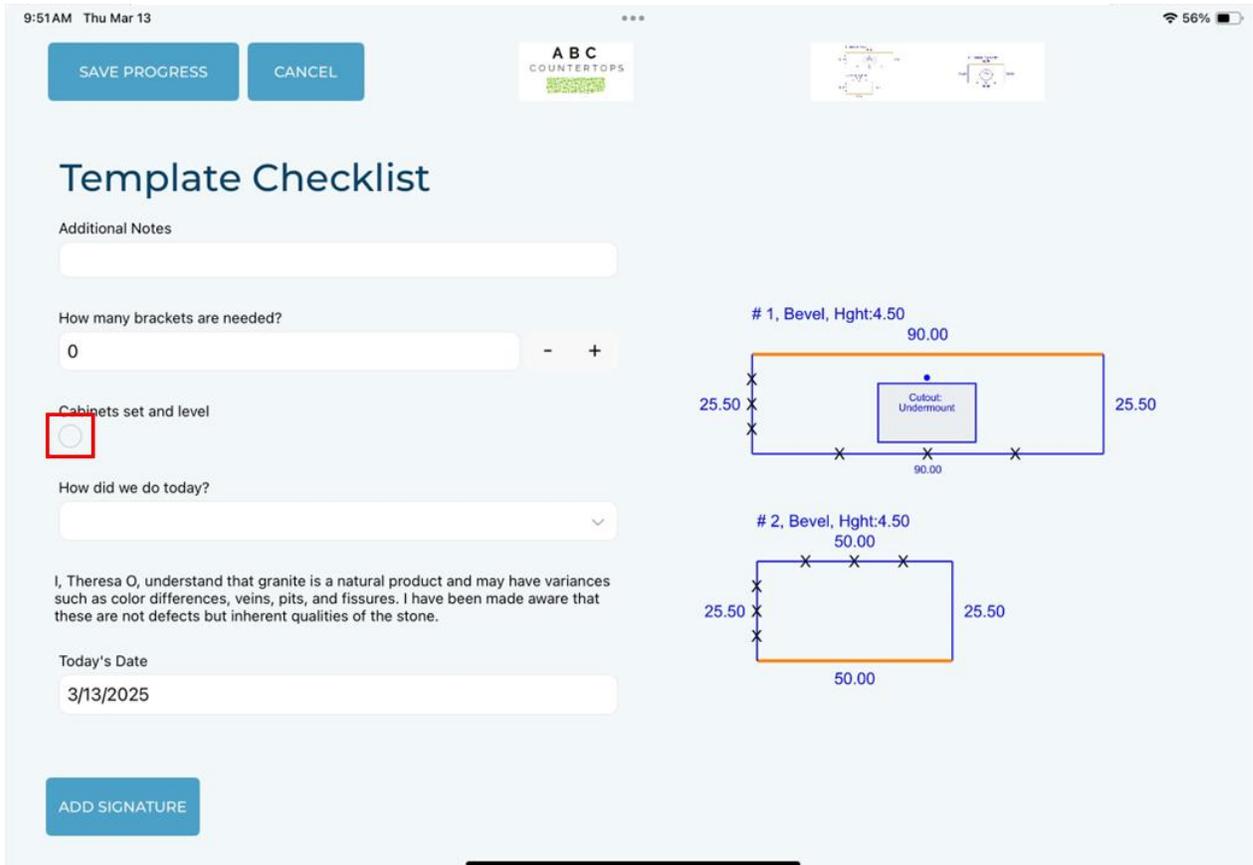
1. **Text:** Users will see a text box to input information.
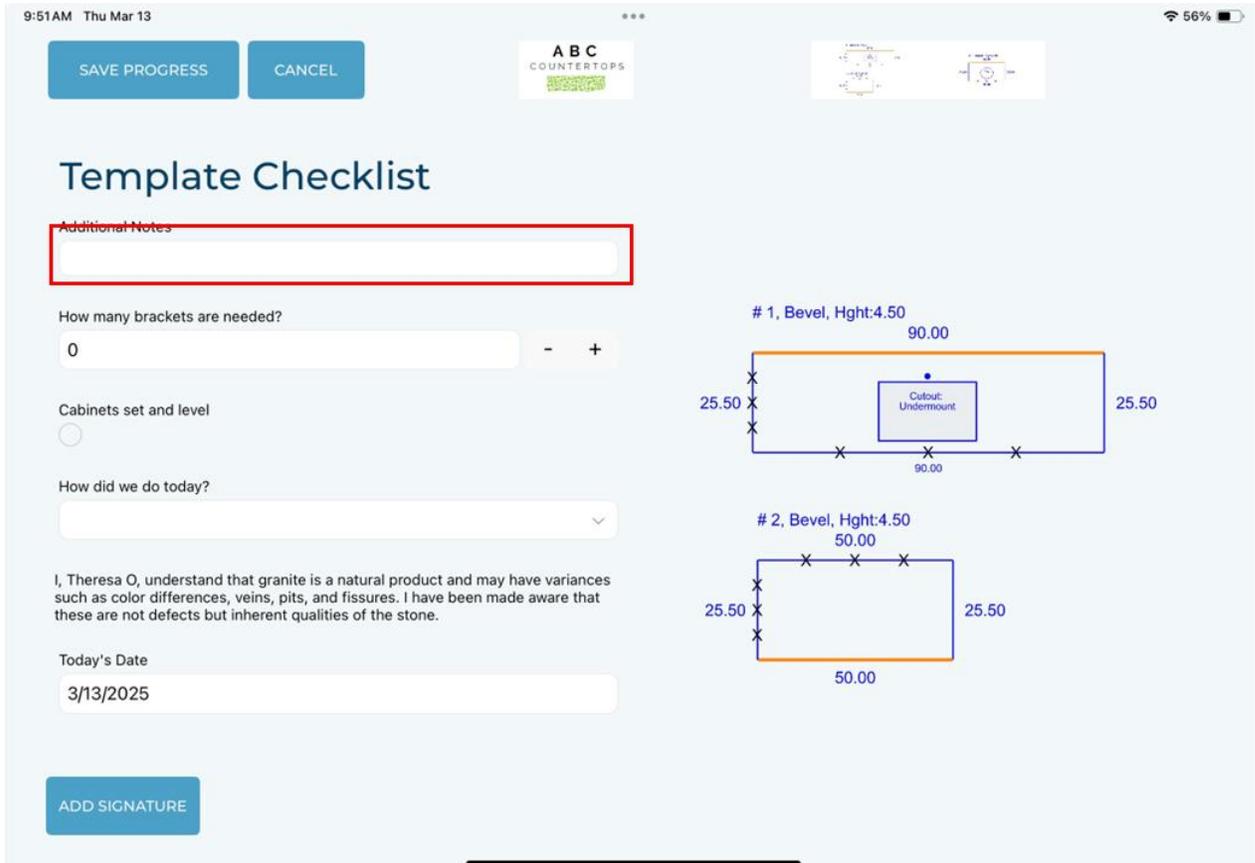
2. **Number:** Users will see a box where numerical values can be entered manually or adjusted using the **+** and **-** icons. Only numerical inputs are accepted.

3. **Checkbox:** An unselected circle can be clicked to check the box.

4. **Text Block:** This option presents a non-editable block of text for conveying supplementary information.

5. **Date:** Users are limited to entering dates in this field type. The date format will be displayed in a numerical form as month/day/year.

Collecting a Signature and Completing the Form

Users will find the **Add Signature** button located at the bottom of the form if a signature is required.

Clicking on the **Add Signature** button will open a box where a signature can be collected.
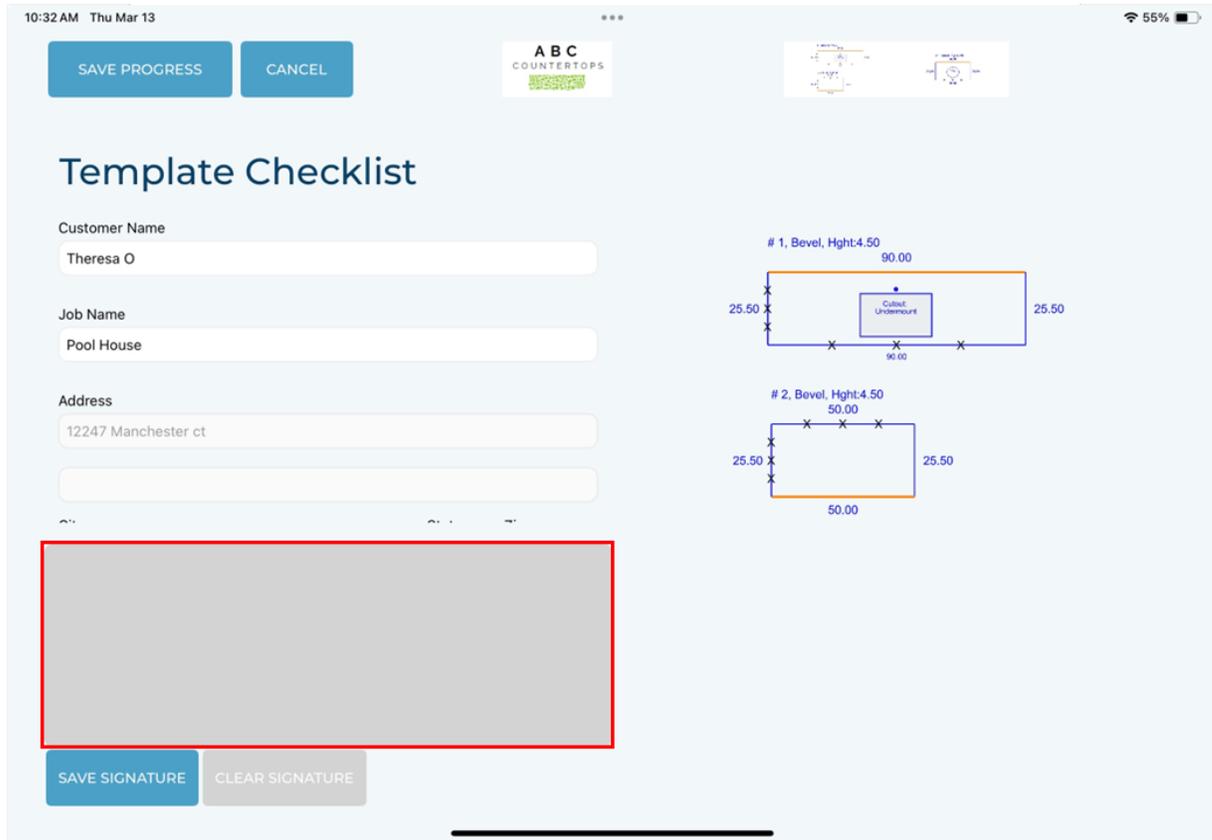
Once the signature is collected, click **Save Signature**.
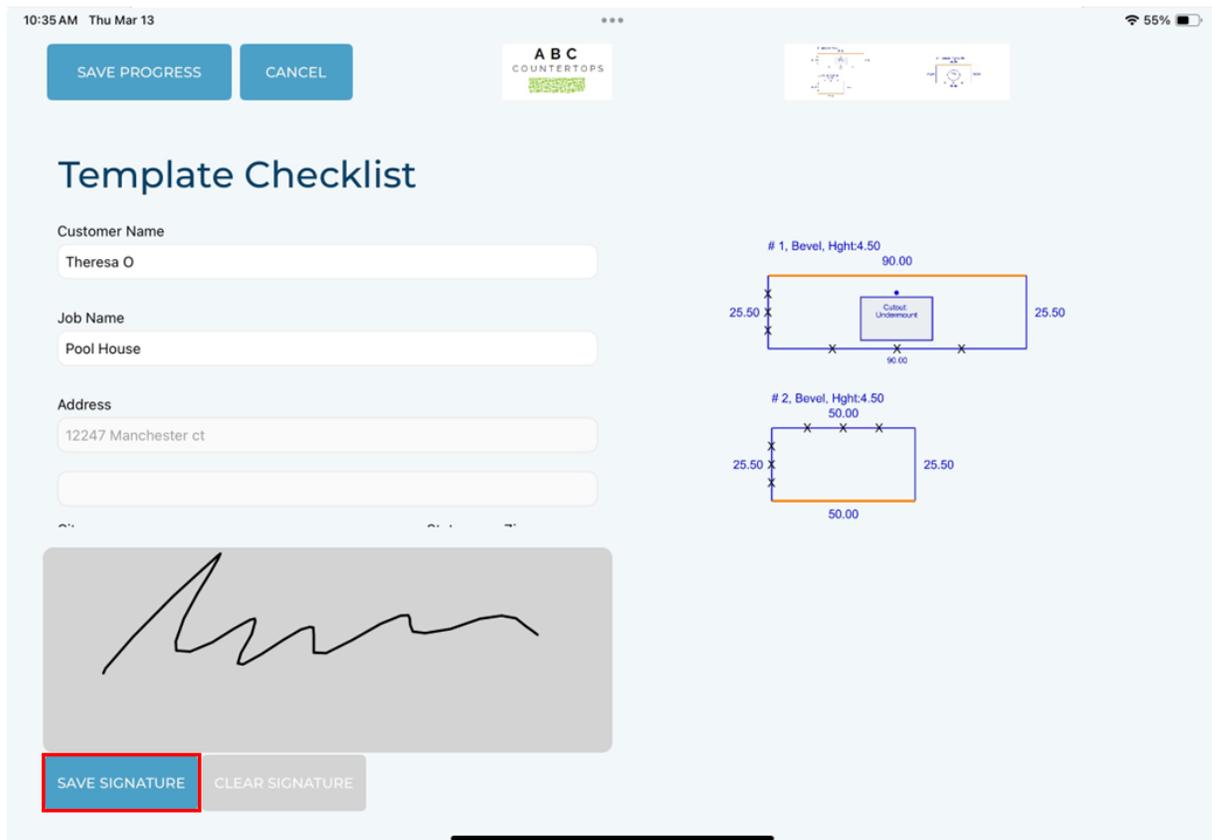
The **Save Progress** button at the top will change to **Save and Complete**. Once **Save and Complete** is clicked, the form will be marked as complete, automatically saved, and uploaded to the **Job Files** in ActionFlow. The form will also be locked from further editing by the user at this point.

Save and Complete will also overwrite the previous **Save** of the form, as this final version is ready to be uploaded to **ActionFlow**.

NOTE: If there is no internet connection, the form will be uploaded once the app is relaunched in an area with internet access. The status will remain as **Complete** until the upload is completed, at which point it will change to **Uploaded**. More information about **Complete** status can be found in this area of this guide.

Additionally, by clicking on **Clear Signature,** the signature in the box will be removed, and the **Save and Complete** button at the top will revert to **Save Progress**, allowing users to save the form's progress but not mark it as complete.
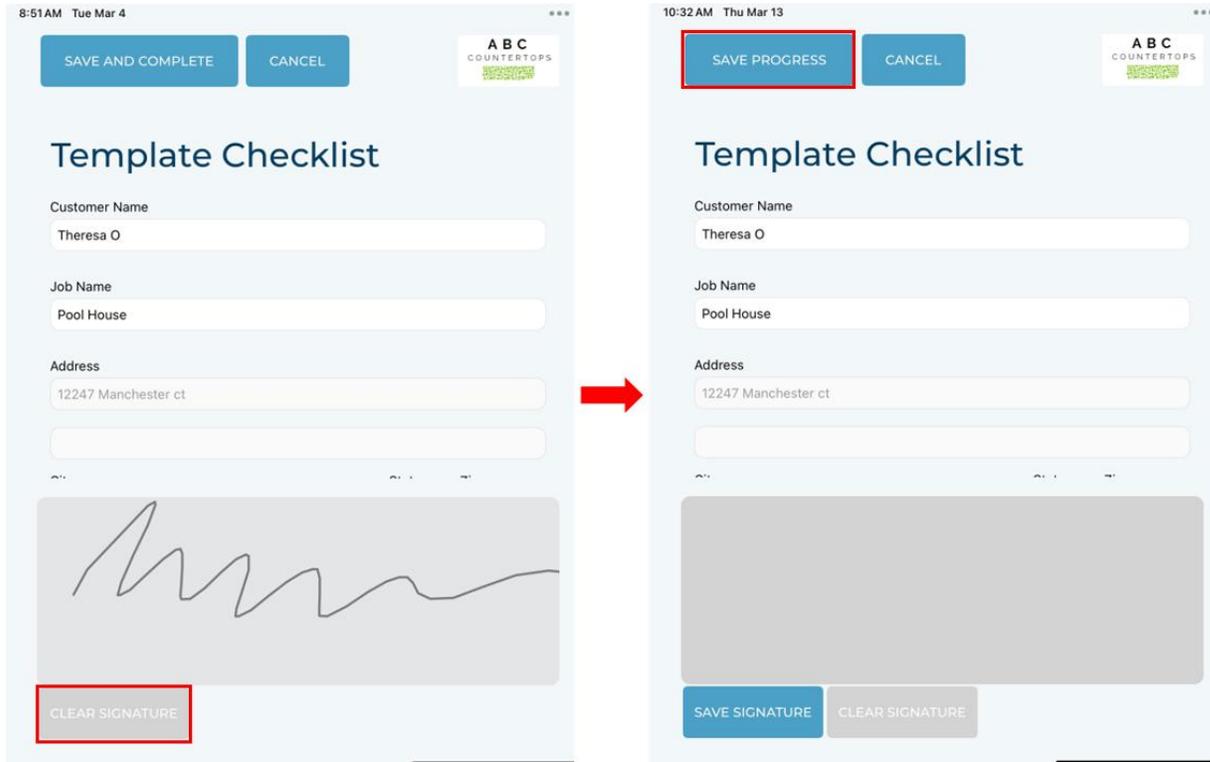
If no signature is required, users will see the **Save and Complete** button at the bottom of the form. Once **Save and Complete** is clicked, the form will be marked as **Complete** and uploaded into **ActionFlow**. If **Save and Complete** is accidentally clicked before the form is finished, users can go back into the form to make changes, which will then be uploaded into **ActionFlow**. It's important to note that only forms that require a signature will become locked from further editing once marked as **Complete**.

NOTE: Selecting **Save and Complete** will overwrite the previous **Save** of the form, as this final version is ready to be uploaded to **ActionFlow**.

Viewing Saved PDFs within the Tablet App

All saved forms, whether **In Progress**, **Completed** or **Uploaded**, will be stored in the **ActionForms** folder on your tablet. Only **Uploaded** forms will appear in the **ActionFlow Job Files**.

NOTE: The **ActionForms App** will automatically create an **ActionForms Folder** in the **Job Files** of the **Desktop App** when forms are uploaded.
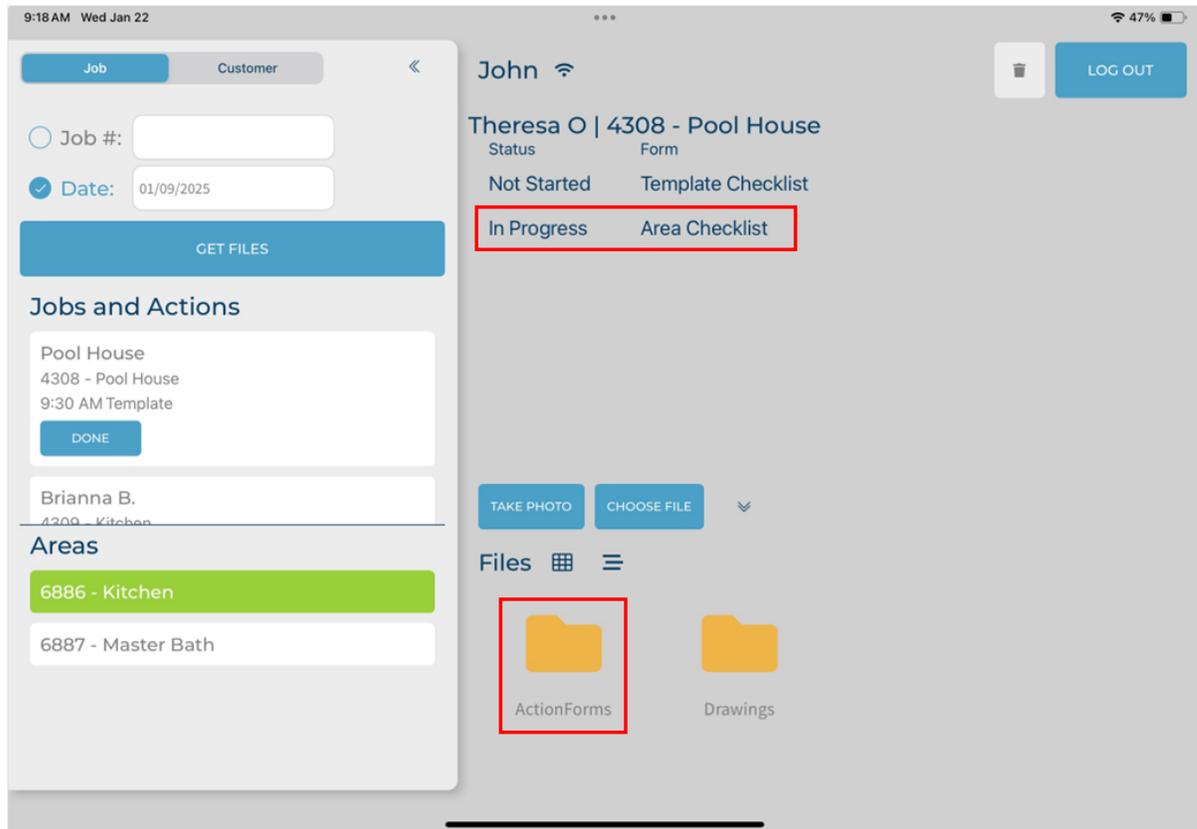
Within the folder, users will find all the **In Progress**, **Completed**, and **Uploaded** files. If the form is a **Job** form, it will be labeled as **[Job Name]_[Form Name]_[Job Number]**. Similarly, an **Area** form will be displayed as **[Area Name]_[Form Name]_[Area Number]**.

For example, if the job is named "Pool House," the form is titled "Template Checklist," and the Job number is 4308, the file will be named as "Pool House_Template Checklist_4308.pdf".
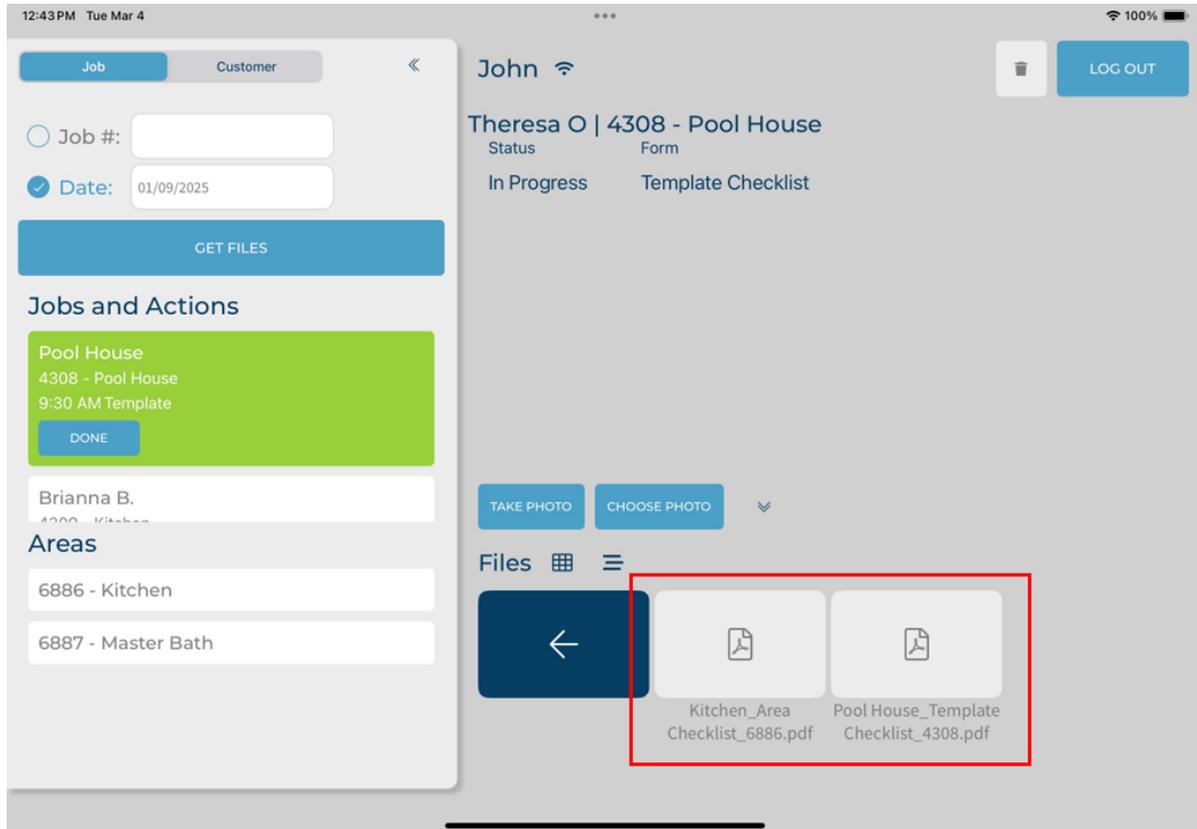
Upon entering the folder, simply click on the PDF you wish to view.

The PDF will then display the form's Name at the top, accompanied by your company logo (if enabled). The details on the form will be displayed in a list view below the heading.

Area Checklist

Customer Name:
Theresa O

Job Name:
Pool House

Area Name:
Kitchen

Address:
12247 Manchester ct

St. Louis MO, 63131

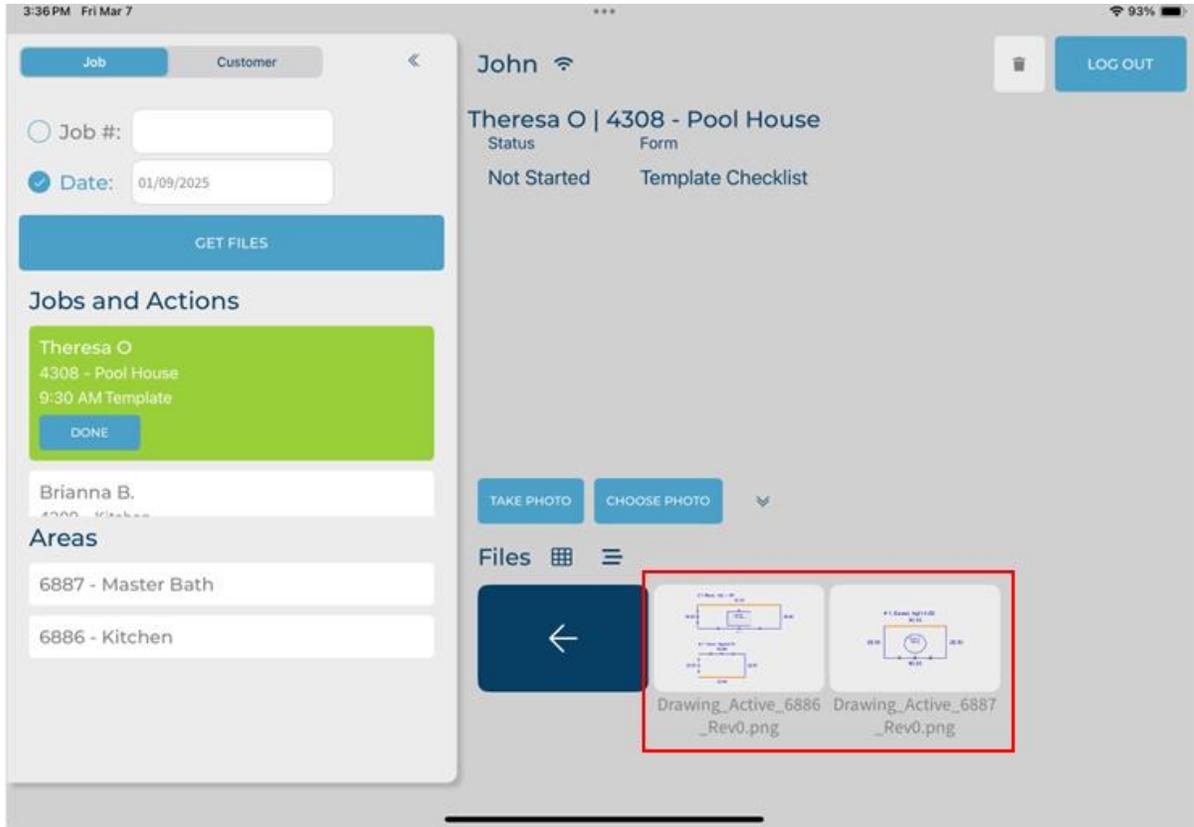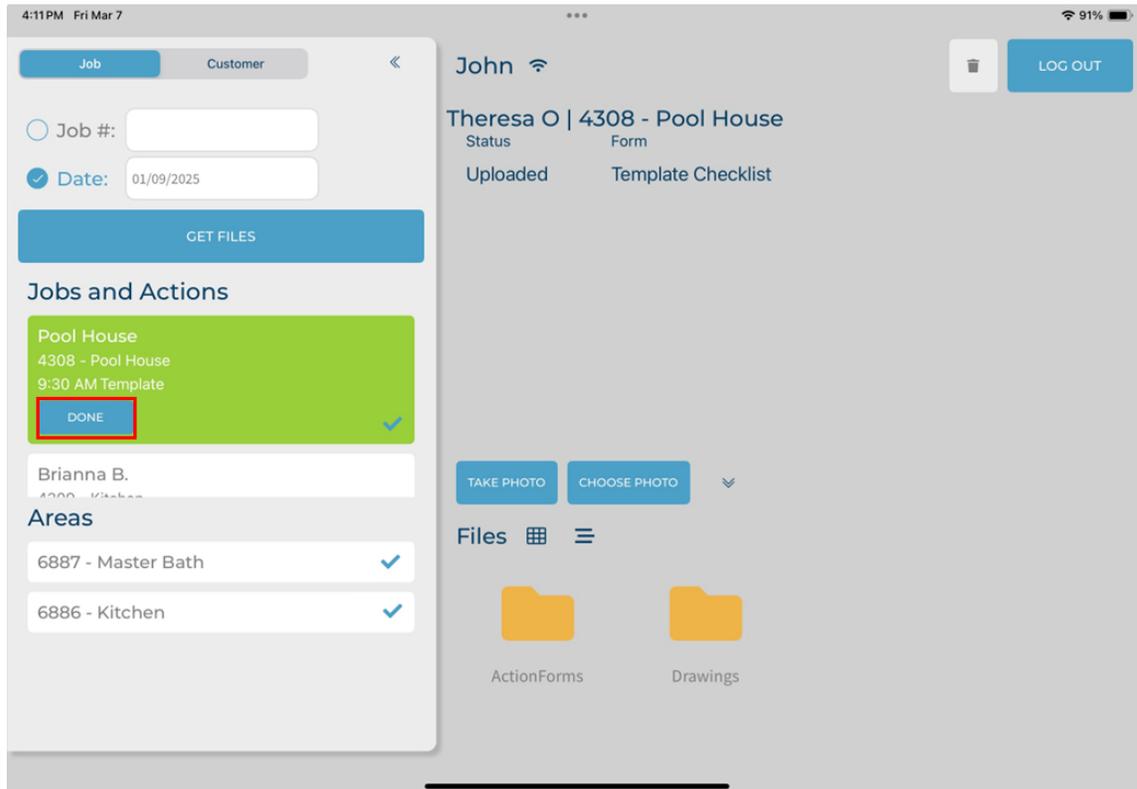Email:
theresa@gmail.com

Phone:
3145558527

Account:

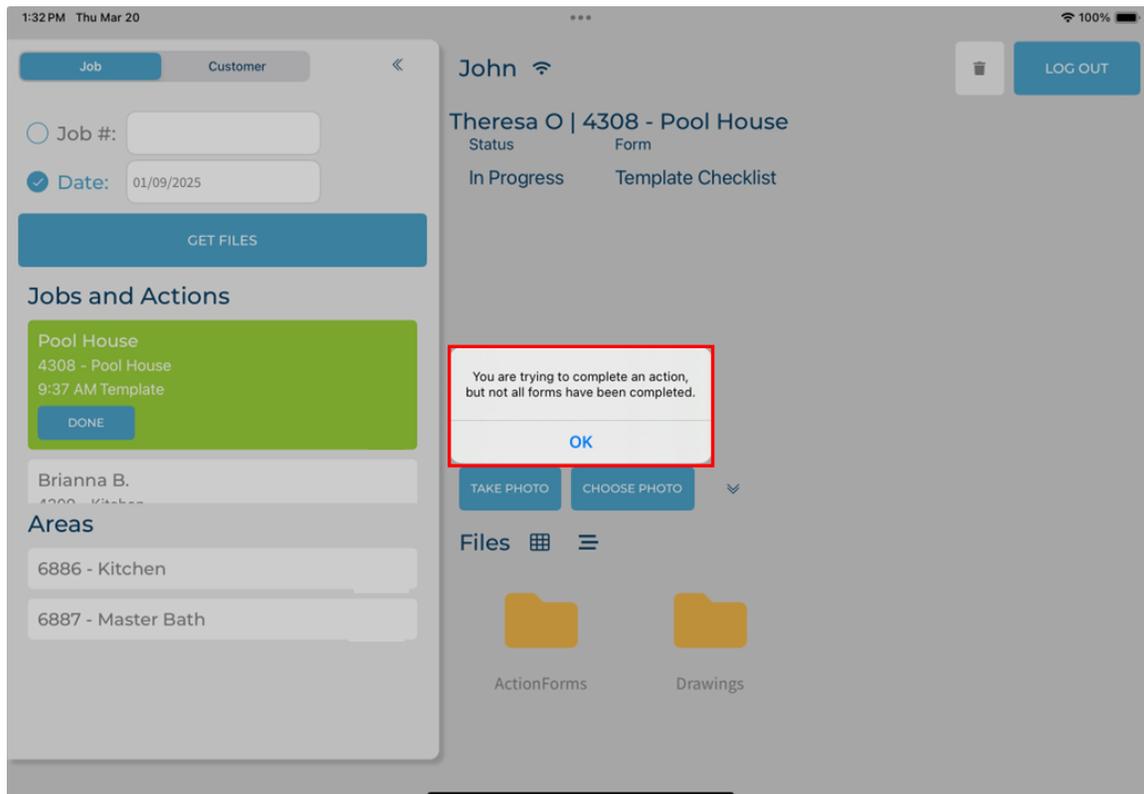All drawings for the Job created in **ActionFlow** will be in the **Drawings Folder**.

## Completing the Assigned Action

Upon completing the form(s), users can complete the **Assigned Action** in **ActionFlow** by clicking the blue "Done" button on the respective job.


Note: Users will encounter an error message if there are any forms left incomplete.

Clicking "Done" will prompt a dialog box to appear, allowing users to select a **Decision** for the **Action** and add any necessary notes on the Action line in the **Comment** area, if desired.
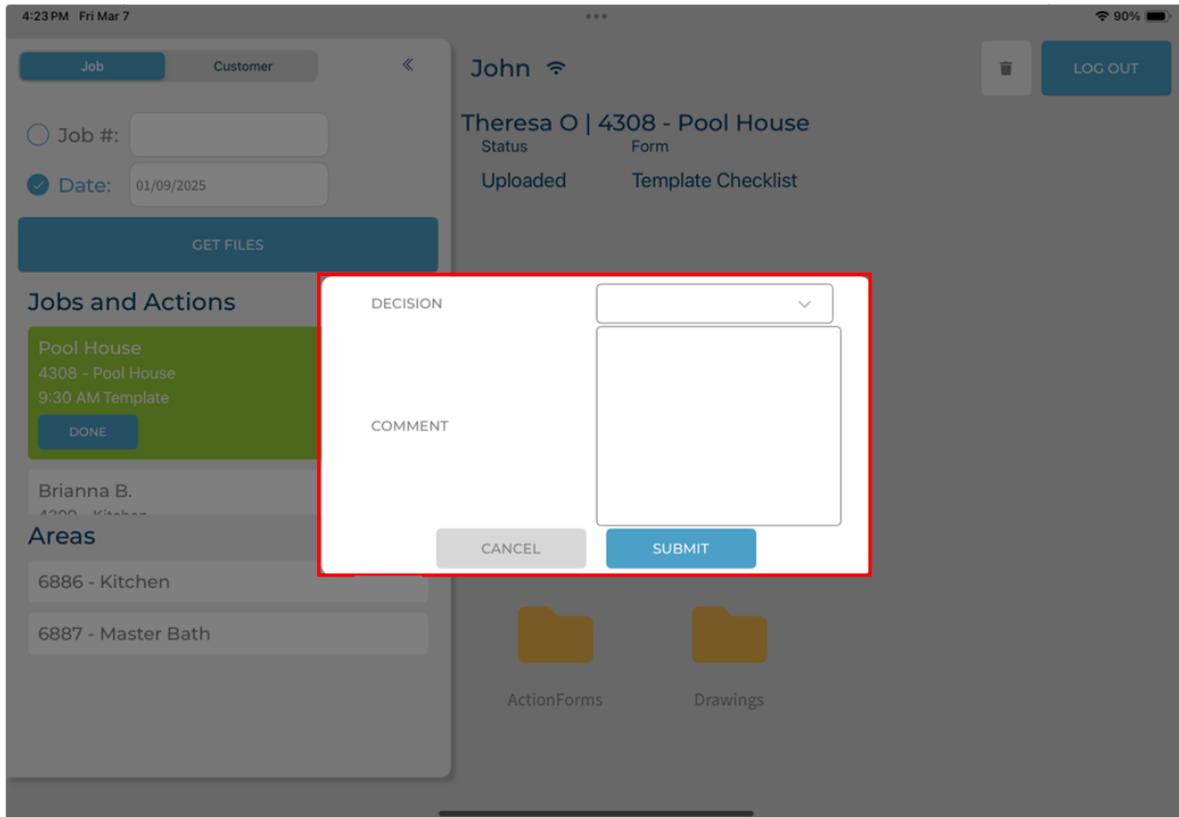
In this example, we are completing the **Template Action** for this Job. First, pick a **Decision** from the dropdown and then click **Submit**. This will mark the **Action** as complete in **ActionFlow**.
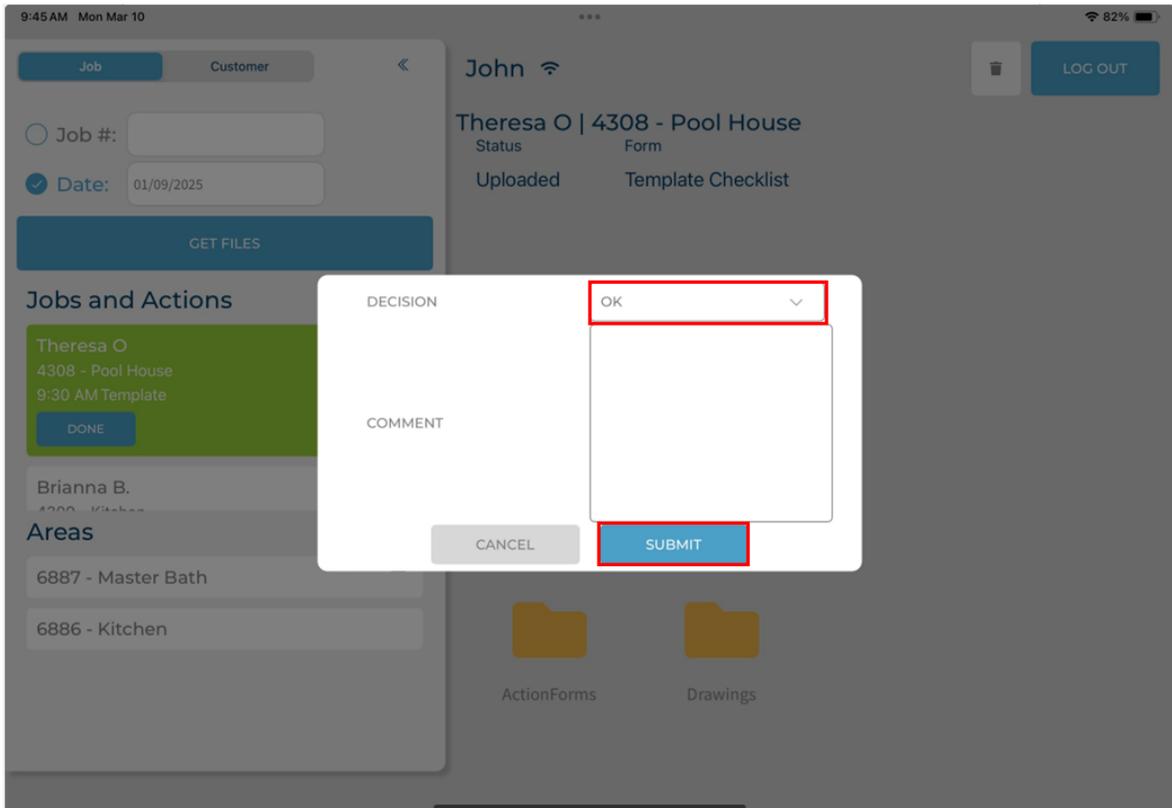
A **checkmark** will appear on the left of the **Job** box, indicating the successful completion of the **Action**.
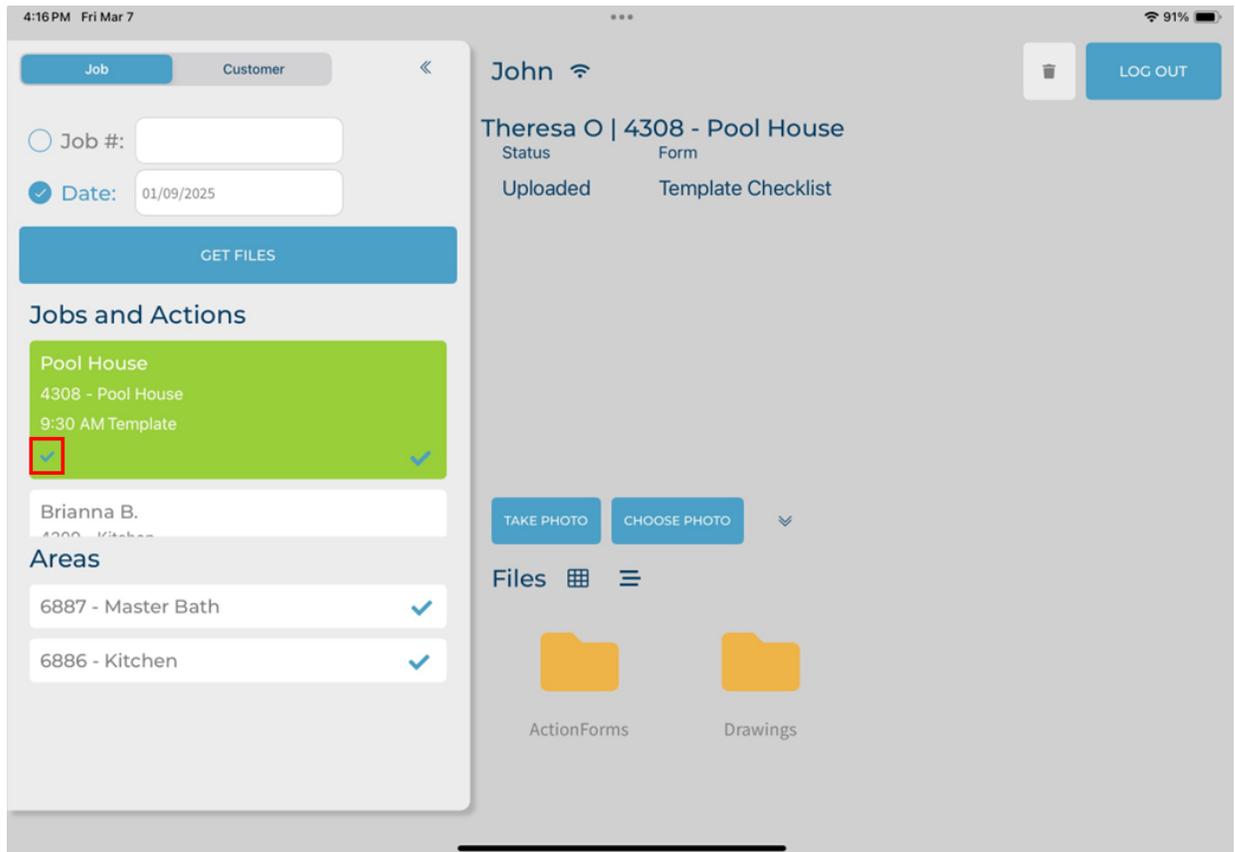
Accessing Completed Forms in the ActionFlow Desktop App

Once a form is uploaded, it will be stored within the **ActionForms** folder in either the **Job** or **Customer Files** section.

If the form's **Parent Type** is classified as **Customer**, the affiliated forms will be in the **ActionForms** folder located within the **Customer Files**.

On the other hand, if the form's **Parent Type** is identified as **Job** or **Area**, the associated forms can be found within the **ActionForms** folder in the **Job Files** section.

Viewing Notifications in ActionFlow

All notifications are displayed in the **Actions Grid** within the respective **Job**. It is important that the **Assigned Roles** are configured for each **Job** to ensure that the appropriate individual receives the notifications. In cases where no specific notifications have been designated on the form, the user who submitted the form will receive the notification. To learn more about setting up notifications, please visit this section of the guide.

There are various methods to configure notifications. One option is to set up a dedicated **Action** to appear in the **Actions Grid**. For instance, an **Action** titled "Template Form Received" has been set up and assigned to the **Project Manager** for this particular job.

Alternatively, notifications can be set up to notify a specific role without the need to create a dedicated **Action**. This will generate a **Comment** simply indicating that "A form has been received."

In situations where no specific notification has been configured, the user who submitted the form will receive a **Comment** stating, "A form has been received." Taking this example, when John, our Templater, completes the form, he will be the recipient of this notification.

Viewing Completed Forms in ActionFlow

Within the **ActionForms** Folder, users will see all the **Completed** forms linked to the **Job**.

Upon opening the form, users will see the **Name** of the form, the **Company Logo** and of all the information collected for the **Job**, as well as the approval signature if it is required.

A B C
C O U N T E R T O P S

Template Checklist

Customer Name:
Theresa O

Job Name:
Pool House

Address:
12247 Manchester ct

St. Louis MO, 63131

Email:
theresa@gmail.com

Phone:
3145558527

Account:

Additional Notes:

How many brackets are needed?:
3

Cabinets set and level:
True

How did we do today?:
Excellent

I, Theresa O, 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.

Today's Date:
January 9, 2025

When a field has its **Read-Only** setting disabled, any **Job** or **Area** related information collected will be automatically updated in **ActionFlow**, ensuring the platform maintains the most up-to-date information available.