

ActionForms User Guide



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## 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.

| 4:02 PM Wed Jan 8        | •••            | 중 87% 🔲 |
|--------------------------|----------------|---------|
|                          |                |         |
|                          |                |         |
|                          |                |         |
|                          |                |         |
|                          | ActionForms    |         |
|                          | by ActionFlow. |         |
|                          |                |         |
|                          |                |         |
|                          |                |         |
| USER NAME                |                |         |
| J                        |                |         |
| PASSWORD                 |                |         |
|                          |                |         |
|                          |                |         |
|                          |                |         |
|                          | LOGIN          |         |
|                          |                |         |
|                          |                |         |
|                          |                |         |
|                          |                |         |
|                          |                |         |
|                          |                |         |
| Version 1.0.33(Build 30) |                |         |
|                          |                |         |



### 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.

| 4:03 PM Wed Jan 8 |          | হ ৪7% 🔳  |
|-------------------|----------|----------|
| Job Customer      | ≪ John 奈 | ELOG OUT |
|                   |          |          |
| () Job #:         |          |          |
| Date: 01/08/2025  |          |          |
| GET FILES         |          |          |
|                   |          |          |
|                   |          |          |
|                   |          |          |
|                   |          |          |
|                   |          |          |
|                   |          |          |
|                   |          |          |
|                   |          |          |
|                   |          |          |
|                   |          |          |
|                   |          |          |
|                   |          |          |
|                   |          |          |

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.

| 4:03 PM Wed Jan 8 | •••    | 중 87% ■ |
|-------------------|--------|---------|
| Job Customer 《    | John 奈 | LOG OUT |
| ) Job #:          |        |         |
| Ol/08/2025        |        |         |
| GET FILES         |        |         |
|                   |        |         |

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

| 4:15 PM Wed Jan 8  | •••    | 중 86% ■) |
|--------------------|--------|----------|
| Job Customer 《     | John 奈 | ELOG OUT |
| Sop #:             |        |          |
| O Date: 01/08/2025 |        |          |
| GET FILES          |        |          |



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

| 4:03 PM Wed Jan 8           |   | •••    |    | 중 87% ■ |
|-----------------------------|---|--------|----|---------|
| Job Customer                | « | John 奈 | Ξ. | LOG OUT |
| ) Job #:                    |   |        |    |         |
| <b>Oli Date:</b> 01/08/2025 |   |        |    |         |
| GET FILES                   |   |        |    |         |
|                             |   |        |    |         |

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

| 9:02 AM Thu Jan 9 |   |        | E             | 9:07 AM T | hu Jan 9 |
|-------------------|---|--------|---------------|-----------|----------|
| Job Customer      | « | John ᅙ | $\rightarrow$ | >         | John ᅙ   |
| ◯ Job #:          |   |        |               |           |          |
| O1/08/2025        |   |        |               |           |          |
| GET FILES         |   |        |               |           |          |
|                   |   |        |               |           |          |

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.

| 4:03 PM Wed Jan 8 | •••    | <b>२</b> 87% 🔳 |
|-------------------|--------|----------------|
| Job Customer 《    | John 🗢 |                |
| ◯ Job #:          |        |                |
| Date: 01/08/2025  |        |                |
| GET FILES         |        |                |
|                   |        |                |

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

| 4:03 PM Wed Jan 8                      |           | •••       | 중 87% ■  |
|--|-----------|-----------|----------|
| Job Customer                           | « John ج  | ,         | ELOG OUT |
| ) Job #:                               |           | -         |          |
| <ul> <li>✓ Date: 01/08/2025</li> </ul> |           |           |          |
| GET FILES                              |           |           |          |
|  |           |           |          |
|  | Wi-Fi     | Wi-Fi Not |          |
|  | Connected | Connected |          |
|  |           |           |          |
|  |           |           |          |
|  | $\frown$  | 5         |          |
|  | -         |           |          |
|  |           |           |          |
|  |           |           |          |

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.

| 4:03 PM Wed Jan 8 | •••      | <b>२</b> 87% 🔳 |
|-------------------|----------|----------------|
| Job Customer      | ≪ John 奈 |                |
| ○ Job #:          |          |                |
| O1/08/2025        |          |                |
| GET FILES         |          |                |



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

| 4:03 PM Wed Jan 8 | •••    | 중 87% ■ |
|-------------------|--------|---------|
| Job Customer «    | John 奈 |         |
| ) Job #:          |        |         |
| Ol/08/2025        |        |         |
| GET FILES         |        |         |
|                   |        |         |

#### 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.

| 11:10 AM Thu Jan 9   | •••    | 중 79% ■ |
|--|--------|---------|
| Job Customer 《   | John 🤝 |         |
| ) Job #:   |        |         |
| Date: 01/09/2025   |        |         |
| GET FILES  |        |         |
| Jobs and Actions   |        |         |
| Brianna B.<br>4309 - Kitchen<br>9:30 AM Template<br>DONE                                   |        |         |
| Theresa O<br>1308 - Pool House   |        |         |
|  | -      |         |
|  |        |         |
|  |        |         |
|  |        |         |
| Brianna B.<br>4309 - Kitchen<br>9:30 AM Template<br>DONE<br>Theresa O<br>4208 - Dool House |        |         |



#### 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**.

| 11:44 AM Thu Jan 9  |        | •••            |   | 중 79% ■ |
|---|--------|----------------|---|---------|
| Job Customer  | « John | n <del>?</del> | Ŧ | LOG OUT |
| ) Job #:  |        |                |   |         |
| Date: 01/09/2025  | _      |                |   |         |
| GET FILES   |        |                |   |         |
| Jobs and Actions  | _      |                |   |         |
| Theresa O Customer Name<br>4308 - Pool House Job # and Name<br>9:30 AM Template Scheduled Time and Action<br>DONE<br>Brianna B.<br>4309 - Kitchen |        |                |   |         |



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.

| 11:44 AM Thu Jan 9   | •••    | 중 79% ■ |
|--|--------|---------|
| Job Customer 《   | John 奈 |         |
| ) Job #:   |        |         |
| Oli/09/2025  |        |         |
| GET FILES  |        |         |
| Jobs and Actions   |        |         |
| Theresa O<br>4308 - Pool House<br>9:30 AM Template Scheduled Action<br>DONE Completes the Scheduled Action<br>Brianna B. |        |         |
| . 1200 - Kitchen   |        |         |
|  |        |         |
|  |        |         |
|  |        |         |
|  |        |         |
|  |        |         |



Upon selecting a job, which will be highlighted in green, the associated **Areas** will be displayed under the **Areas** section.

| 3:13PM Fri Feb 28                                    |  | 중 100% ■ |
|--|--|----------|
| Job Customer 《                                       | John ᅙ   |          |
| <ul> <li>Job #:</li> <li>Date: 01/09/2025</li> </ul> | Theresa O   4308 - Pool House<br>StatusNot StartedTemplate Checklist |          |
|  |  |          |
| Jobs and Actions                                     |  |          |
| Theresa O<br>4308 - Pool House<br>9:30 AM Template   |  |          |
| Brianna B.   | ТАКЕ РНОТО СНООЅЕ РНОТО 🛛 👻  |          |
| Areas  | Files III -  |          |
| 6886 - Kitchen                                       |  |          |
| 6887 - Master Bath                                   |  |          |
|  | ActionForms Drawings   |          |
|  |  |          |
|  |  |          |



To the right, you will see information about the selected **Job** and all the forms linked to it.

| 3:13 PM Fri Feb 28   |  | 중 100% ■ |
|--|--|----------|
| Job Customer 《   | John 奈   |          |
| <ul> <li>Job #:</li> <li>✓ Date: 01/09/2025</li> </ul>     | Theresa O   4308 - Pool HouseStatusFormNot StartedTemplate Checklist |          |
| GET FILES  |  |          |
| Jobs and Actions   |  |          |
| Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE |  |          |
| Brianna B.   | ТАКЕ РНОТО СНООЅЕ РНОТО 😽  |          |
| Areas  | Files ⊞ ≡  |          |
| 6886 - Kitchen   |  |          |
| 6887 - Master Bath   |  |          |
|  | ActionForms Drawings   |          |



Forms specific to the **Area** must be viewed by selecting the desired **Area**. This view will show both **Job** AND **Area** forms.

| 3:02 PM Fri Feb 28   |  | 奈 100% ■ |
|--|--|----------|
| Job Customer 《   | John 🗢                                       | ELOG OUT |
| ) Job #:   | Theresa O   4308 - Pool House<br>Status Form |          |
| Date: 01/09/2025   | Not Started Template Checklist               |          |
| CET FILES  | Not Started Area Checklist                   |          |
| Jobs and Actions   |  |          |
| Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE |  |          |
| Brianna B.   | ТАКЕ РНОТО СНООЅЕ РНОТО 😵                    |          |
| Areas<br>6886 - Kitchen<br>6887 - Master Bath              | Files ⊞ ☱                                    |          |
|  |  |          |
| -  | ActionForms Drawings                         |          |



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**.

| 3:13 PM Fri Feb 28   |   | ***  |   | হ 100% 🔳 |
|--|---|--|---|----------|
| Job Customer   | « | John 🗢                                       | Ŧ | LOG OUT  |
| ) Job #:   |   | Theresa O   4308 - Pool House<br>Status Form |   |          |
| O1/09/2025   |   | Not Started Template Checklist               |   |          |
| GET FILES  |   |  |   |          |
| Jobs and Actions   |   |  |   |          |
| Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE |   |  |   |          |
| Brianna B.   |   | ТАКЕ РНОТО СНООЅЕ РНОТО                      |   |          |
| Areas  |   | Files ⊞ ≡                                    |   |          |
| 6886 - Kitchen   |   |  |   |          |
| 6887 - Master Bath   |   |  |   |          |
|  |   | ActionForms Drawings                         |   |          |
|  |   |  |   |          |

Users can also collapse or expand the Files area using the << and >> icons.

| TAKE PHOTO CHOOSE PHOTO | ×      |            |              |
|-------------------------|--------|------------|--------------|
|                         |        |            |              |
| ActionForms Dr          | awings | ТАКЕ РНОТО | СНООЅЕ РНОТО |



Toggling between **folder** and **list** view is simple with the grid and line icons.

| 3:13PM Fri Feb 28  |   | 중 100% ■   |
|--|---|--|
| Job Customer 《   | John 🗢  |  |
| ◯ Job #:   | Theresa O   4308 - Pool House   |  |
| Olympical Date: 01/09/2025   | Not Started Template Checklist  |  |
| GET FILES  |   |  |
| Jobs and Actions   |   |  |
| Theresa O<br>4308 - Pool House<br>9:30 AM Template   |   |  |
| Brianna B.   | ТАКЕ РНОТО СНООЅЕ РНОТО 💝   |  |
| Areas  | Files III =   |  |
| 6886 - Kitchen   |   |  |
| 6887 - Master Bath   |   |  |
|  | ActionForms Drawings  |  |
|  |   |  |
|  |   |  |
|  |   |  |
| 3:27 PM Fri Feb 28   | •••   | 奈 100% ■   |
| 3:27 PM Fri Feb 28   | <br>John 奈  | ♀ 100% ■ ■ LOG OUT   |
| 3:27 PM Fri Feb 28<br>Job Customer «   | <br>John 奈<br>Theresa O   4308 - Pool House<br>Status Form  | ♥ 100% ■ LOC OUT   |
| 3:27PM Fri Feb 28<br>Job Customer «<br>Job #:<br>Date: 01/09/2025  | John 奈<br>Theresa O   4308 - Pool House<br><sub>Status Form</sub><br>Not Started Template Checklist   | ♥ 100% ■ LOG OUT   |
| 3:27 PM Fri Feb 28<br>   | John 🗢<br>Theresa O   4308 - Pool House<br>Status Form<br>Not Started Template Checklist  | ♥ 100% ■ LOG OUT   |
| 3:27PM Fri Feb 28<br>Job Customer «<br>Job #:<br>Date: 01/09/2025<br>GET FILES<br>Jobs and Actions   | John 🗢<br>Theresa O   4308 - Pool House<br>Status Form<br>Not Started Template Checklist  | <ul> <li>♥ 100%</li> <li>■</li> <li>LOG OUT</li> </ul>   |
| 3:27PM FriFeb 28<br>Job Customer «<br>Job #:<br>Date: 01/09/2025<br>CET FILES<br>Jobs and Actions<br>Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE  | John 🗢<br>Theresa O   4308 - Pool House<br>Status Form<br>Not Started Template Checklist  | ►         ■         LOG OUT  |
| 3:27 PM Fri Feb 28<br>Job Customer «<br>Job #:<br>Date: 01/09/2025<br>CET FILES<br>Jobs and Actions<br>Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE<br>Brianna B.  | John 奈<br>Theresa O   4308 - Pool House<br>Status Form<br>Not Started Template Checklist  | Image: Constant of the second of the sec                     |
| 3:27 PM Fri Feb 28<br>Job Customer «<br>Job #:<br>Date: 01/09/2025<br>CET FILES<br>Jobs and Actions<br>Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE<br>Brianna B.<br>Access  | John <section-header> Theresa O   4308 - Pool House Status Form Not Started Template Checklist TAKE PHOTO CHOOSE PHOTO</section-header>                               | Image: Description of the second |
| 3:27PM Fri Feb 28<br>Job Customer «<br>Job #:<br>Job #:<br>Date: 01/09/2025<br>CET FILES<br>Jobs and Actions<br>Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE<br>Brianna B.<br>MOD Viether<br>Areas<br>6886 - Kitchen                         | John 奈<br>Theresa O   4308 - Pool House<br>Status Form<br>Not Started Template Checklist<br>TAKE PHOTO CHOOSE PHOTO ¥<br>Files ⊞ Ξ                                    | P 100%   LOG OUT   |
| 3:27 PM Fri Feb 28<br>Job Customer «<br>Job #:<br>Job #:<br>Date: 01/09/2025<br>CET FILES<br>Jobs and Actions<br>Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE<br>Brianna B.<br>2000 Whether<br>Areas<br>6886 - Kitchen<br>6887 - Master Bath | John R<br>Theresa O   4308 - Pool House<br>Status Form<br>Not Started Template Checklist<br>TAKE PHOTO (HOOSE PHOTO) &<br>Files I CHOOSE PHOTO &<br>Files ActionForms | Image: Constraint of the second s                     |
| 3:27PM Fri Feb 28<br>Job Customer «<br>Job #:<br>Job #:<br>Date: 01/09/2025<br>CET FILES<br>JObs and Actions<br>Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE<br>Brianna B.<br>MOD Viecher<br>6886 - Kitchen<br>6887 - Master Bath            | John R<br>Theresa O   4308 - Pool House<br>Status Form<br>Not Started Template Checklist<br>TAKE PHOTO CHOOSE PHOTO *<br>Files III E<br>ActionForms<br>Drawings       | Image: Note of the second                      |



## **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:

| 3:13 PM Fri Feb 28   | •••                                     | 奈 100% ■ |
|--|---|----------|
| Job Customer   | John 🤝                                  |          |
| <ul> <li>○ Job #:</li> <li>○ Date: 01/09/2025</li> </ul>   | StatusFormNot StartedTemplate Checklist |          |
| Jobs and Actions   | •                                       |          |
| Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE |   |          |
| Brianna B.   | ТАКЕ РНОТО CHOOSE РНОТО 😵               |          |
| Areas  | Files # =                               |          |
| 6886 - Kitchen   |   |          |
| 6887 - Master Bath   |   |          |
|  | ActionForms Drawings                    |          |



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

| 3:02 PM Fri Feb 28  |   | 奈 100% ■ |
|---|---|----------|
| Job Customer 《  | John 🤝  | ELOG OUT |
| <ul> <li>Job #:</li> <li>Date: 01/09/2025</li> <li>CET FILES</li> </ul> | Theresa O   4308 - Pool HouseStatusFormNot StartedTemplate ChecklistNot StartedArea Checklist |          |
| Jobs and Actions  |   |          |
| Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE              |   |          |
| Brianna B.  | ТАКЕ РНОТО СНООЅЕ РНОТО 🛛 👻   |          |
| Areas<br>6886 - Kitchen   | Files ⊞ Ξ   |          |
| 6887 - Master Bath  |   |          |
|   | ActionForms Drawings  |          |



#### In Progress Status

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

| 4:05 PM Fri Feb 28  |   | 중 100% ■ |
|---|---|----------|
| Job Customer 《  | John 🤶  | ELOG OUT |
| <ul> <li>○ Job #:</li> <li>○ Date: 01/09/2025</li> <li>CET FILES</li> </ul> | Theresa O   4308 - Pool HouseStatusFormIn ProgressTemplate ChecklistIn ProgressArea Checklist |          |
| Jobs and Actions  |   |          |
| Pool House<br>4308 - Pool House<br>9:30 AM Template                         |   |          |
| Brianna B.  | ТАКЕ РНОТО СНООЅЕ РНОТО 🛛   |          |
| Areas<br>6886 - Kitchen   | Files ⊞ ☱   |          |
| 6887 - Master Bath  |   |          |
|   | ActionForms Drawings  |          |



#### **Complete Status**

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.

| 4:19 PM Fri Feb 28  |   |   | ≁ 99% 🔳 |
|---|---|---|---------|
| Job Customer 《  | John 🕱 - 3 Files waiting to send  | Ŧ | LOG OUT |
| <ul> <li>Job #:</li> <li>✓ Date: 01/09/2025</li> <li>CET FILES</li> </ul> | Theresa O   4308 - Pool HouseStatusFormCompleteTemplate ChecklistCompleteArea Checklist |   |         |
| Jobs and Actions  |   |   |         |
| Pool House<br>4308 - Pool House<br>9:30 AM Template                       |   |   |         |
| Brianna B.  | ТАКЕ РНОТО СНООЅЕ РНОТО 😽   |   |         |
| Areas<br>6886 - Kitchen   | Files ⊞ Ξ   |   |         |
| 6887 - Master Bath 🗸  |   |   |         |
|   | ActionForms Drawings  |   |         |



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.

| 4:58 PM Tue Mar 11  | •••  | ≁ 71% ■) |
|---|--|----------|
| Job Customer 《  | John 🕱 - 1 File waiting to send  |          |
| <ul> <li>Job #:</li> <li>✓ Date: 01/09/2025</li> <li>GET FILES</li> </ul> | Theresa O   4308 - Pool HouseStatusFormCompleteTemplate ChecklistIn ProgressArea Checklist |          |
| Jobs and Actions  |  |          |
| Pool House<br>4308 - Pool House<br>9:30 AM Template                       |  |          |
| Brianna B.  | ТАКЕ РНОТО CHOOSE РНОТО 🛛 😵  |          |
| Areas<br>6886 - Kitchen   | Files ⊞ ≡  |          |
| 6887 - Master Bath  |  |          |
|   | ActionForms Drawings   |          |



## **Uploaded Status**

The **Uploaded** status denotes the form has been successfully uploaded to ActionFlow.

| 4:23 PM Fri Feb 28  |   | 중 99% ■ |
|---|---|---------|
| Job Customer 《  | John 🤶  |         |
| <ul> <li>Job #:</li> <li>⊘ Date: 01/09/2025</li> <li>GET FILES</li> </ul> | Theresa O   4308 - Pool HouseStatusFormUploadedTemplate ChecklistUploadedArea Checklist |         |
| Jobs and Actions  |   |         |
| Pool House<br>4308 - Pool House<br>9:30 AM Template                       |   |         |
| Brianna B.  | ТАКЕ РНОТО СНООЅЕ РНОТО 😵   |         |
| Areas<br>6886 - Kitchen   | Files ⊞ ≡   |         |
| 6887 - Master Bath 🗸  |   |         |
|   | ActionForms Drawings  |         |



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**.

| 5:05 PM Tue Mar 11  |   | 중 70% ■ |
|---|---|---------|
| Job Customer 《  | John 🤝  |         |
| <ul> <li>Job #:</li> <li>✓ Date: 01/09/2025</li> <li>CET FILES</li> </ul>   | Status     Form       Uploaded     Template Checklist ← Job Form       In Progress     Area Checklist ← Area Form |         |
| Jobs and Actions  |   |         |
| Pool House       4308 - Pool House       9:30 AM Template       DONE       This Job form has been       Completed but an Area       Form is still open. |   |         |
| Brianna B.  | ТАКЕ РНОТО CHOOSE РНОТО 🛛 👻   |         |
| Areas<br>6886 - Kitchen This Area Form has been<br>Completed.   | Files ⊞ Ξ   |         |
|   | ActionForms Drawings  |         |
|   |   |         |
| -   |   |         |



## 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.

| 3:13PM Fri Feb 28  |  |   | 중 100% ■ |
|--|--|---|----------|
| Job Customer 《   | John 🤝   | Ŧ | LOG OUT  |
| <ul> <li>Job #:</li> <li>⊘ Date: 01/09/2025</li> </ul>     | Theresa O   4308 - Pool House       Status     Form       Not Started     Template Checklist |   |          |
| GET FILES  |  |   |          |
| Jobs and Actions   | -  |   |          |
| Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE |  |   |          |
| Brianna B.   | ТАКЕ РНОТО CHOOSE РНОТО 🛛 🕹  |   |          |
| Areas  | Files ⊞ ≡  |   |          |
| 6886 - Kitchen   |  |   |          |
| 6887 - Master Bath   |  |   |          |
|  | ActionForms Drawings   |   |          |
|  |  |   |          |



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.

| AM Wed Mar 12       |   | *** <del>?</del> 6             |
|---------------------|---|--------------------------------|
| SAVE PROGRESS       | Will save form's COUNTERTOR<br>progress | Logo that will display on form |
| Template Chec       | klist                                   | Job Form                       |
| Customer Name       |   | Selected Job Drawing           |
| Theresa O           |   | +                              |
| Job Name            |   | # 1, Bevel, Hght:4.50<br>90.00 |
| Pool House          |   | *                              |
| Address             |   | 25.50 X Cutout: 25.50          |
| 12247 Manchester ct |   |                                |
|                     |   | 50.00                          |
| City                | State Zip                               | # 2, Bevel, Hght:4.50<br>50.00 |
| St. Louis           | MO 63131                                | ¥ × × ×                        |
|                     |   | 25.50 ¥ 25.50                  |
| Email               |   | *                              |
| theresa@gmail.com   |   | 50.00                          |
| Phone               |   |                                |



In an Area Form, you will only see the drawing associated with that Area.

| SAVE PROGRESS       | Will save form's progress | A B C<br>COUNTERTOPS | Logo that will display on form |
|---------------------|---------------------------|----------------------|--------------------------------|
| Area Checklist      |                           |                      | 🔶 Area Form                    |
| Customer Name       |                           |                      | Area Drawing                   |
| Theresa O           |                           |                      | +                              |
| Job Name            |                           |                      | # 1, Bevel, Hght:4.50<br>90.00 |
| Pool House          |                           |                      |                                |
| Area Name           |                           |                      | 25.50 25.50                    |
| Kitchen             |                           |                      |                                |
| Addross             |                           |                      | 90.00                          |
| 12247 Manchester ct |                           |                      | # 2, Bevel, Hght:4.50          |
|                     |                           |                      | × × ×                          |
|                     |                           |                      | 25.50 X 25.50                  |
| City                | State                     | Zip                  | ×                              |
| St. Louis           | мо                        | 63131                | 50.00                          |
|                     |                           |                      |                                |
| Fmail               |                           |                      |                                |
|                     |                           |                      | -                              |
| SAVE AND COMPLETE   |                           |                      |                                |



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.

| 13 AM Wed Mar 12     |                      |  | 奈 67% ■ |
|----------------------|----------------------|--|---------|
| SAVE PROGRESS CANCEL | A B C<br>COUNTERTOPS | $=\frac{1}{1-\frac{1}{2}} + \frac{1}{2} + \frac{1}{$ |         |
| Area Checklist       |                      |  |         |
| Customer Name        |                      |  |         |
| Theresa O            |                      |  |         |
| Joh Name             |                      | # 1, Bevel, Hght:4.50  |         |
| Pool House           |                      | 90.00  | _       |
|                      |                      | × •  |         |
| Area Name            |                      | 25.50 Undermount   | 25.50   |
| Kitchen              |                      | ↓ × × ×  |         |
| Address              |                      | 90.00  |         |
| 12247 Manchester ct  |                      | # 2, Bevel, Hght:4.50<br>50.00   |         |
|                      |                      | x x x  |         |
|                      |                      | 25.50 X 25.50  |         |
| City                 | State Zip            | *  |         |
| St. Louis            | MO 63131             | 50.00  |         |
|                      |                      |  |         |
| Fmail                |                      |  |         |
|                      |                      |  |         |
| SAVE AND COMPLETE    |                      |  |         |
|                      |                      |  |         |



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.

| 29 AM Wed Mar 12     | ***                  |  | 중 65% ■ |
|----------------------|----------------------|--|---------|
| SAVE PROGRESS CANCEL | A B C<br>COUNTERTOPS | ************************************** |         |
|                      |                      |  |         |
| Area Checklist       |                      |  |         |
| Address              |                      |  |         |
| 12247 Manchester Ct  |                      |  |         |
|                      |                      | # 1, Bevel, Hght:4.50<br>90.00         |         |
| City                 | State Zip            | *                                      | 7       |
| St. Louis            | MU 63131             | 25.50 X Undermount                     | 25.50   |
| Email                |                      | X X X                                  |         |
| theresa@gmail.com    |                      | # 0. Devel Method 50                   |         |
| Phone                |                      | # 2, Bevel, Fight 4.50                 |         |
| 3145558527           |                      | ×                                      |         |
|                      |                      | 25.50 X 25.50                          |         |
| Account              |                      | 50.00                                  |         |
|                      |                      |  |         |
| \$ #                 |                      |  |         |
| SAVE AND COMPLETE    |                      |  |         |
|                      |                      |  |         |



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**.

| 10:53 AM Wed Mar 12   |                      |  | 중 62% ■ |
|---|----------------------|--|---------|
| SAVE PROGRESS CANCEL  | A B C<br>COUNTERTOPS |  |         |
| Area Checklist<br>Material<br>Granite 3CM<br>Color<br>Absolute Black 3CM  |                      | # 1, Bevel, Hght:4.50<br>90.00                                     |         |
| Edge<br>Bevel<br>Sink Model   | 25.50                | Cutout:<br>Undermount<br>X 90.00                                   | 25.50   |
| Kohler 3322<br>Line Items<br>1 Labor: Template Charge<br>1 Faucet Layout: 1 Hole Center<br>1 Cutout: Undermount<br>11.67 Misc: Splash Per Linear Feet<br>2 Granite 3CM: Absolute Black 3CM<br>29.16 Labor: Labor for Slab Calculations<br>2 Misc: Per Piece Charge<br>15.91 Edge: Bevel | 25.50                | # 2, Bevel, Hght:4.50<br>50.00<br>X X X<br>25.50<br>50.00<br>50.00 |         |
| SAVE AND COMPLETE   |                      |  |         |



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.

| 9:51 AM Thu Mar 13   | ***  |              |  |       | 중 56% ■ |
|--|--|--------------|--|-------|---------|
| SAVE PROGRESS CANCEL   | A B C<br>COUNTERTOPS                       |              | $\begin{array}{c} & & \\ & & \\ & & \\ & & \\ & & \\ & & \\ & & \\ &$ |       |         |
| Template Checklist   |  |              |  |       |         |
| How many brackets are needed?  |  | # 1, Bevel   | Hght:4.50  |       |         |
| 0  | - +  |              | 50.00  | ,     |         |
| Cabinets set and level   |  | 25.50 ×<br>× | Cutout:<br>Undermoi  | ant X | 25.50   |
| How did we do today?   |  |              | 90.00  |       |         |
|  | ~  | # 2, Beve    | , Hght:4.50  |       |         |
| I, Theresa O, understand that granite is a natural product and<br>such as color differences, veins, pits, and fissures. I have bee<br>these are not defects but inherent qualities of the stone.<br>Todav's Date | I may have variances<br>on made aware that | 25.50 ×      | X X  | 25.50 |         |
| 3/13/2025  |  |              | 50.00  |       |         |
| ADD SIGNATURE  |  |              |  |       |         |



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.

| 9:51AM Thu Mar 13  | ABC                           |          | 4 (80 - 17) <sub>200</sub> |            | 중 56% ■ |
|--|-------------------------------|----------|----------------------------|------------|---------|
| SAVE PROGRESS CANCEL   | COUNTERTO                     | PS       | ni<br>                     | - <u>0</u> |         |
| Template Checklist   |                               |          |                            |            |         |
| Hew many brackets are needed?<br>O   | - +                           | # 1, Bev | el, Hght:4.50<br>90.01     | 0          | _       |
| Cabinets set and level   |                               | 25.50 ×  | Cutout<br>Undermo          | unt X      | 25.50   |
| How did we do today?   |                               |          | 90.00                      |            |         |
|  | ~                             | # 2, Bev | vel, Hght:4.50             |            |         |
| I, Theresa O, understand that granite is a natural product and may h<br>such as color differences, veins, pits, and fissures. I have been made<br>these are not defects but inherent qualities of the stone. | ave variances<br>e aware that | 25.50 ×  | <u> </u>                   | 25.50      |         |
| Today's Date   |                               |          | 50.00                      | _          |         |
| 3/13/2025  |                               |          | 50.00                      |            |         |
| ADD SIGNATURE  |                               |          |                            |            |         |
|  |                               |          |                            |            |         |



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

| AM Thu Mar 13  | ◆ 56% ■)                            |
|--|-------------------------------------|
| Template Checklist   |                                     |
| How many brackets are needed?  | # 1, Bevel, Hght:4.50<br>90.00      |
| Cabinets set and level   | 25.50 × Cutout:<br>Undermount 25.50 |
| How did we do today?   | # 2, Bevel, Hght:4.50               |
| I, Theresa O, understand that granite is a natural product and may have variances<br>such as color differences, veins, pits, and fissures. I have been made aware that<br>these are not defects but inherent qualities of the stone. | 25.50 × 25.50                       |
| Today's Date   | *                                   |
|  | 50.00                               |



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

| 9:51AM Thu Mar 13   |                      |                   |   |         | 중 56% ■_) |
|---|----------------------|-------------------|---|---------|-----------|
| SAVE PROGRESS CANCEL  | A B C<br>COUNTERTOPS |                   | $\begin{array}{c} \begin{array}{c} & & \\ & & \\ & & \\ & & \\ & & \\ & & \\ \end{array} \end{array} \begin{array}{c} & & \\ & & \\ & \\ & \\ & \\ & \\ & \\ & \\ & $ | n State |           |
| Template Checklist  |                      |                   |   |         |           |
| Additional Notes  |                      |                   |   |         |           |
|   |                      |                   |   |         |           |
| How many brackets are needed?   |                      | # 1, Bev          | vel, Hght:4.50<br>90.00   | )       |           |
| 0   | - +                  |                   |   | ·       |           |
| Cabinets set and level  |                      | *<br>25.50 ×<br>× | Cutout:<br>Undermou<br>X X<br>90.00   | int X   | 25.50     |
| How did we do today?  |                      |                   |   |         |           |
|   | ~                    | # 2, Be           | vel, Hght:4.50<br>50.00   |         |           |
|   |                      | ×                 | <u> </u>  | ſ       |           |
| such as color differences, veins, pits, and fissures. I have been mad<br>these are not defects but inherent qualities of the stone. | e aware that         | 25.50 ×           |   | 25.50   |           |
| Today's Date  |                      | 1                 |   |         |           |
| 3/13/2025   |                      |                   | 50.00   |         |           |
|   |                      |                   |   |         |           |
|   |                      |                   |   |         |           |
|   |                      |                   |   |         |           |
| ADDIGNATORE   |                      |                   |   |         |           |
|   |                      |                   |   |         |           |



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.

| 9:51AM Thu Mar 13  | A B C                         | $\frac{1+2\pi m_{H_{1}}}{m_{H_{2}}} = 0$ | - mgr    | 중 56% ■ |
|--|-------------------------------|--|----------|---------|
|  |                               |  | M.Q. F   |         |
| Template Checklist   |                               |  |          |         |
| Additional Notes   |                               |  |          |         |
|  |                               |  |          |         |
| How many brackets are needed?  |                               | # 1, Bevel, Hght:4.50                    |          |         |
| 0  | - +                           | 90.00                                    |          |         |
| Cabinets set and level   |                               | 25.50 × Colout<br>X X X                  | nt 2     | 25.50   |
| How did we do today?   |                               | 90.00                                    |          |         |
|  | ~                             | # 2, Bevel, Hght:4.50                    |          |         |
| I, Theresa O, understand that granite is a natural product and may h<br>such as color differences, veins, pits, and fissures. I have been made<br>these are not defects but inherent qualities of the stone. | ave variances<br>e aware that | 25.50 × × × ×                            | 25.50    |         |
| Today's Date   |                               | 50.00                                    | <u>.</u> |         |
| 3/13/2025  |                               | 00.00                                    |          |         |
| ADD SIGNATURE  |                               |  |          |         |



### 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.

| 10:25 AM Thu Mar 13  | •                    | • •            |  |               | • 🗢 56% 🔳 |
|----------------------|----------------------|----------------|--|---------------|-----------|
| SAVE PROGRESS CANCEL | A B C<br>COUNTERTOPS |                | $\begin{array}{c} \frac{1}{2} \frac{1}{2}$ | ~             |           |
| Template Checklist   | :                    |                |  |               |           |
| Customer Name        |                      |                |  |               |           |
| Theresa O            |                      |                |  |               |           |
| Job Name             |                      | # 1, Beve      | el, Hght:4.50<br>90.   | .00           |           |
| Pool House           |                      | $\downarrow$   |  |               |           |
| Address              |                      | 25.50          | Cuto<br>Under  | put:<br>mount | 25.50     |
| 12247 Manchester ct  |                      | 1              | -X   | ×             |           |
|                      |                      |                |  |               |           |
| City                 | State Zip            | # 2, Bev       | el, Hght:4.50<br>50.00   |               |           |
| St. Louis            | MO 63131             | ×              | ~ ~  |               |           |
|                      |                      | 25.50 <b>X</b> |  | 25.50         |           |
| Email                |                      | 1              |  |               |           |
| theresa@gmail.com    |                      |                | 50.00  |               |           |
| Phone                |                      |                |  |               |           |
|                      |                      |                |  |               |           |
| ADD SIGNATURE        |                      |                |  |               |           |
|                      |                      |                |  |               |           |



Clicking on the **Add Signature** button will open a box where a signature can be collected.

| 20 AM Thu May 40               |                      |                                 |          |
|--------------------------------|----------------------|---------------------------------|----------|
| SAVE PROCRESS CANCEL           | A B C<br>COUNTERTOPS |                                 | ♥ 55% ■_ |
| Template Checklist             |                      |                                 |          |
| Customer Name                  |                      |                                 |          |
| Theresa O                      |                      | # 1, Bevel, Hght:4.50<br>90.00  |          |
|                                |                      | *                               |          |
| Job Name                       |                      | 25.50 <b>X</b> Undermount 25.50 |          |
| Pool House                     |                      | × × × ×                         |          |
| Address                        |                      | # 2, Bevel, Hght:4.50           |          |
| 12247 Manchester ct            |                      | 50.00<br>× × ×                  |          |
|                                |                      | 25.50 X 25.50                   |          |
|                                |                      | *                               |          |
| ~ ~ ~                          |                      | 50.00                           |          |
|                                |                      |                                 |          |
|                                |                      |                                 |          |
|                                |                      |                                 |          |
|                                |                      |                                 |          |
|                                |                      |                                 |          |
|                                |                      |                                 |          |
|                                |                      |                                 |          |
| SAVE SIGNATURE CLEAR SIGNATURE |                      |                                 |          |
|                                |                      |                                 |          |

Once the signature is collected, click **Save Signature**.

| 10:35 AM Thu Mar 13            | • • •                |                                 | 중 55% ■ |
|--------------------------------|----------------------|---------------------------------|---------|
| SAVE PROCRESS CANCEL           | A B C<br>COUNTERTOPS |                                 |         |
|                                |                      |                                 |         |
| Template Checklist             |                      |                                 |         |
| Customer Name                  |                      |                                 |         |
| Theresa O                      |                      | # 1, Bevel, Hght4.50<br>90.00   |         |
| Job Name                       |                      | 25.50 Cittot<br>Urdemount 25.50 |         |
| Pool House                     |                      | x x x                           |         |
| Address                        |                      | # 2, Bevel, Hght:4.50<br>50.00  |         |
| 12247 Manchester ct            |                      | * * * *                         |         |
|                                |                      | 25.50 <b>X</b> 25.50 <b>X</b>   |         |
| 01                             |                      | 50.00                           |         |
| 1                              |                      |                                 |         |
| Λ                              |                      |                                 |         |
| Inn                            |                      |                                 |         |
| 1000                           |                      |                                 |         |
|                                |                      |                                 |         |
|                                |                      |                                 |         |
| SAVE SIGNATURE CLEAR 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.

| 10:39 AM Thu Mar 13                     | ••••                           |
|---|--------------------------------|
| Template Checklist                      |                                |
| Customer Name                           |                                |
| Theresa O                               | # 1, Bevel, Hght:4.50<br>90.00 |
| Job Name                                | 25.50 × Underson 25.50         |
| Pool House                              | × × ×                          |
| Address                                 | # 2, Bovol, Hght:4.50<br>50.00 |
| 12247 Manchester ct                     |                                |
|   | 25.50                          |
| A), | 50.00                          |
| Ann                                     |                                |
| CLEAR SIGNATURE                         |                                |



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.

| 8:51AM Tue Mar 4         | •••                  | 10:32 AM Thu Mar 13            |                      |
|--------------------------|----------------------|--------------------------------|----------------------|
| SAVE AND COMPLETE CANCEL | A B C<br>COUNTERTOPS | SAVE PROGRESS CANCEL           | A B C<br>COUNTERTOPS |
| Template Checklist       |                      | Template Checklist             |                      |
| Customer Name            |                      | Customer Name                  |                      |
| Theresa O                |                      | Theresa O                      |                      |
| Job Name                 |                      | Job Name                       |                      |
| Pool House               |                      | Pool House                     |                      |
| Address                  |                      | Address                        |                      |
| 12247 Manchester ct      |                      | 12247 Manchester ct            |                      |
|                          |                      |                                |                      |
|                          |                      |                                |                      |
| Mm                       |                      |                                |                      |
|                          |                      |                                |                      |
| CLEAR SIGNATURE          |                      | SAVE SIGNATURE CLEAR SIGNATURE |                      |



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**.

| 9:13 AM Wed Mar 12               |                             |  | 奈 67% ■ |
|----------------------------------|-----------------------------|--|---------|
| SAVE PROGRESS Will save progress | form's A B C<br>COUNTERTOPS | 1997 - 19 |         |
| Area Checklist                   |                             |  |         |
| Customer Name                    |                             |  |         |
| Theresa O                        |                             |  |         |
| Job Name                         |                             | # 1, Bevel, Hght:4.50<br>90.00   |         |
| Pool House                       |                             |  | 7       |
| Area Name                        | 25.                         | 50 × Undermount  | 25.50   |
| Kitchen                          |                             |  |         |
| Address                          |                             | 90.00  |         |
| 12247 Manchester ct              |                             | # 2, Bevel, Hght:4.50<br>50.00   |         |
|                                  |                             | . <u> </u>   |         |
|                                  | 25                          | x<br>.50 x 25.50   |         |
| City                             | State Zip                   | ×  |         |
| St. Louis                        | MO 63131                    | 50.00  |         |
|                                  |                             |  |         |
| Fmail                            |                             |  |         |
|                                  |                             |  |         |
| SAVE AND COMPLETE                | form as complete.           |  |         |
|                                  |                             |  |         |



#### 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.

| 9:18 AM Wed Jan 22                                       |   |   | 🗢 47% 🔳 |
|--|---|---|---------|
| Job Customer 《   | John 🤶  | Ŧ | LOG OUT |
| <ul> <li>○ Job #:</li> <li>⊘ Date: 01/09/2025</li> </ul> | Theresa O   4308 - Pool House         Status       Form         Not Started       Template Checklist         In Progress       Area Checklist |   |         |
| GET FILES  | Area oneckist   |   |         |
| Jobs and Actions   |   |   |         |
| Pool House<br>4308 - Pool House<br>9:30 AM Template      |   |   |         |
| Brianna B.   | TAKE PHOTO CHOOSE FILE 🛛 🐳  |   |         |
| Areas  | Files ⊞ ≡   |   |         |
| 6886 - Kitchen   |   |   |         |
| 6887 - Master Bath                                       |   |   |         |
|  | ActionForms Drawings  |   |         |
|  |   |   |         |
|  |   |   |         |



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".

| 12:43 PM Tue Mar 4  | •••   | 중 100% ■ |
|---|---|----------|
| Job Customer 《  | John 🤝  | ELOG OUT |
| ) Job #:  | Theresa O   4308 - Pool House<br>Status Form                              |          |
| Ol/09/2025  | In Progress Template Checklist  |          |
| GET FILES   |   |          |
| Jobs and Actions  |   |          |
| Pool House<br>4308 - Pool House<br>9:30 AM Template<br>DONE |   |          |
| Brianna B.  | ТАКЕ РНОТО СНООЅЕ РНОТО 💝   |          |
| Areas   | Files ⊞ Ξ   |          |
| 6886 - Kitchen  |   | 7        |
| 6887 - Master Bath  |   |          |
|   | Kitchen_Area Pool House_Template<br>Checklist_6886.pdf 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.





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

| 3:36 PM Fri Mar 7  |  | 🗢 93% 🔳  |
|--|--|----------|
| Job Customer «   | John 奈   | ELOG OUT |
| ) Job #:   | Theresa O   4308 - Pool House  |          |
| Ol/09/2025   | Not Started Template Checklist   |          |
| GET FILES  |  |          |
| Jobs and Actions   |  |          |
| Theresa O<br>4308 - Pool House<br>9:30 AM Template<br>DONE |  |          |
| Brianna B.   | ТАКЕ РНОТО СНООЅЕ РНОТО 😻  |          |
| Areas  | Files III =  |          |
| 6887 - Master Bath   |  |          |
| 6886 - Kitchen   | Contraction of the second seco | 7        |
|  |  |          |



#### 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.

| 4:11PM Fri Mar 7                                    | •••  | <b>?</b> 91% 🔳 |
|---|--|----------------|
| Job Customer 《                                      | John 奈                                       |                |
| ) Job #:  | Theresa O   4308 - Pool House<br>Status Form |                |
| Ol/09/2025  | Uploaded Template Checklist                  |                |
| GET FILES   |  |                |
| Jobs and Actions                                    |  |                |
| Pool House<br>4308 - Pool House<br>9:30 AM Template |  |                |
| Brianna B.  | ТАКЕ РНОТО СНООЅЕ РНОТО 🛛 🐳                  |                |
| Areas   | Files =                                      |                |
| 6887 - Master Bath 🗸                                |  |                |
| 6886 - Kitchen 🗸                                    |  |                |
|   | ActionForms Drawings                         |                |
|   |  |                |

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

| 1:32 PM Thu Mar 20   |   | 🗢 100% 🔳 |
|--|---|----------|
| Job Customer   | John 🕈  |          |
| <ul> <li>Job #:</li> <li>✓ Date: 01/09/2025</li> </ul>   | Theresa O   4308 - Pool House         Status       Form         In Progress       Template Checklist  |          |
| GET FILES  |   |          |
| Jobs and Actions   |   |          |
| Pool House<br>4308 - Pool House<br>9:37 AM Template<br>DONE<br>Brianna B.<br>4000 - Vinter<br>6886 - Kitchen<br>6887 - Master Bath | Vou are trying to complete an action, but not all forms have been completed.   OK   TAKE PHOTO   CHOOSE PHOTO   Files   E   Action Forms   Drawings |          |



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.

| 4:23 PM Fri Mar 7                                   |          |               |                    | <b>२</b> 90% 🔲 |
|---|----------|---------------|--------------------|----------------|
| Job Customer  | «        | John ᅙ        |                    |                |
| ) Job #:  |          | Theresa O   - | 4308 - Pool House  |                |
| O Date: 01/09/2025                                  |          | Uploaded      | Template Checklist |                |
| GET FILES   |          |               |                    |                |
| Jobs and Actions                                    | DECISION |               | ~                  |                |
| Pool House<br>4308 - Pool House<br>9:30 AM Template |          |               |                    |                |
| DONE  | COMMENT  |               |                    |                |
| Brianna B.<br>1200 - Kitcher                        |          |               |                    |                |
| Areas   |          | CANCEL        | SUBMIT             |                |
| 6886 - Kitchen                                      |          |               |                    |                |
| 6887 - Master Bath                                  |          |               |                    |                |
|   |          |               |                    |                |
|   |          |               |                    |                |



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**.

| 9:45 AM Mon Mar 10                                 |          | •                                |                    |   |   | 중 82% ■ |
|--|----------|----------------------------------|--------------------|---|---|---------|
| Job Customer                                       | «        | John ᅙ                           |                    |   | Ŧ | LOG OUT |
| ) Job #:   |          | Theresa O  <br><sub>Status</sub> | 4308 - Pool House  |   |   |         |
| O1/09/2025   |          | Uploaded                         | Template Checklist |   |   |         |
| GET FILES  |          |                                  |                    |   |   |         |
| Jobs and Actions                                   | DECISION |                                  | ок 🗸               | ] |   |         |
| Theresa O<br>4308 - Pool House<br>9:30 AM Template |          |                                  |                    |   |   |         |
| DONE   | COMMENT  |                                  |                    |   |   |         |
| Brianna B.   |          |                                  |                    |   |   |         |
| Areas  |          | CANCEL                           | SUBMIT             |   |   |         |
| 6887 - Master Bath                                 |          |                                  |                    |   |   |         |
| 6886 - Kitchen                                     |          |                                  |                    |   |   |         |
|  |          |                                  |                    |   |   |         |
|  |          |                                  |                    |   |   |         |
|  |          |                                  |                    |   |   |         |



A **checkmark** will appear on the left of the **Job** box, indicating the successful completion of the **Action**.

| 4:16 PM Fri Mar 7                                   |  | <b>?</b> 91% 🔳 |
|---|--|----------------|
| Job Customer 《                                      | John 奈                                       | LOC OUT        |
| ) Job #:  | Theresa O   4308 - Pool House<br>Status Form |                |
| O1/09/2025  | Uploaded Template Checklist                  |                |
| GET FILES   |  |                |
| Jobs and Actions                                    |  |                |
| Pool House<br>4308 - Pool House<br>9:30 AM Template |  |                |
| Brianna B.  | ТАКЕ РНОТО СНООЅЕ РНОТО 😵                    |                |
| Areas   | Files III =                                  |                |
| 6887 - Master Bath 🗸                                |  |                |
| 6886 - Kitchen 🗸                                    |  |                |
|   | ActionForms Drawings                         |                |



## 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**.

| Act         | tionFlow. <  | Home Processes                 | Administration  | Implementation   | LOG OUT         | I I I I I I I I I I I I I I I I I I I | 3 💧 🖬       | 🦇 🛗 🖿 🌲   | SAVE 🖸 UN  |               |
|-------------|--|--------------------------------|-----------------|--|-----------------|---------------------------------------|-------------|---|--|---------------|
| < version - | Customer J   | ob Account Sche                | duler Inventory | Vendor >   | User: 1         | 'heresa 🗸 🖌                           | Action: * 🗸 | Future Days: 0 ToD  | os: Do Now   | <b>v</b> 17   |
| cus         |  | Customer: #170021<br>Job: 🛯    | Sally O'Malley  | <ul><li>Search</li><li>Search</li></ul>                  | c               | REATE QUOTE                           |             |   |  |               |
| + 2 Q 1 □ ∰ | <ul> <li>Custome</li> <li>Name:</li> <li>Status:</li> <li>Type:</li> <li>Lead Source:</li> <li>Details</li> <li>Actions</li> </ul> | r Basic Info<br>Sally O'Malley | C 4             | ProcessID     *     ```````````````````````````````````` | n<br>Person Per | son Search                            |             | Customer File<br>View Rename<br>Email Download<br>Paperless Local<br>Upload to Lowes<br>Upload to HausPro<br>+ >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>> | Vove<br>Print Browse Images<br>Files Create Default Fold<br>Download from Lowes<br>Download from Haus<br>ustomer/170021/ | ders<br>\$Pro |
|             | Account     Job Data     Job:  |                                |                 |  |                 |                                       |             | > ActionFor   | শ Date uploaded  | T T           |

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.

| nFlow. <           | > Home P    | rocesses A              | dministratic          | n Im   | plemer         | ntation          | Welcom   | ne, Th | eresa  | - ABC  | Counte | ertops     | LOG       | оот 🧔    | 0      |                   | f     | <b>₿</b> | 8         |          |         | 1            | o www  |
|--------------------|-------------|-------------------------|-----------------------|--------|----------------|------------------|----------|--------|--------|--------|--------|------------|-----------|----------|--------|-------------------|-------|----------|-----------|----------|---------|--------------|--------|
| Customer           | Job Account | Schedule                | n Inventor            | / Ve   | ndor           | Fabrication      | Fab Sche | duler  | Grie   | dView  | Rep    | > <b>•</b> | Use       | : Theres | a ~    | Action            | • •   | Future   | Days: 0   | Тоб      | Dos:    | Do Nov       | v 🗸 1  |
| MER VIEW<br>B VIEW | Customer: 4 | ≇169366 TI<br>≇4308 @ P | neresa O<br>ool House | ~ s    | earch<br>earch |                  | CREATE   | QUOT   | E      |        | 61     |            |           |          |        |                   |       |          |           |          |         |              |        |
| Job B              | asic Info   |                         |                       |        |                |                  | Area     | List:  |        |        |        | Are        | a# Search |          | G      | o to Rei          | ord   | <b>ا</b> | b Files   |          |         |              | Þ      |
| Name:              | Pool House  | Ø                       | <b>4</b> 2 ~          | Pr     | ocessID        | Standard 🗸       | +        |        |        |        | Sort   | τ #^τ      | Rv T      | Name     | T Qn   | it <del>v</del> S | tatus | + 1      |           |          |         |              |        |
| Status             | Templated   | ~                       |                       | Q      | Con            | tact Information | 1        |        | Ø      | Ģ      | 0      | 6886       | 0         | Kitchen  | 1      |                   | Tei   | View     | Rename    | e Mo     | ve Mov  | e To Job     |        |
| Type:              | ~           |                         |                       | Q      | Pers           | ions             | Ø        |        | Ø      | Ţ      | 0      | 6887       | 0         | Master B | ath 1  |                   | Tei   | Email    | Downle    | oad      | rint Br | owse Imag    | es     |
| Contact            |             |                         | ~                     | 0      | Acci           | aned Roles       | 徊        |        |        |        |        |            |           |          |        |                   |       | Paper    | ess Loo   | cal File | Creat   | e Default Fe | olders |
| contact            |             |                         |                       |        |                | gried rivies     | ×        | <      |        |        |        |            |           |          |        |                   | , ×   | Uploa    | d to Low  | ves Do   | wnload  | from Lowe    | 5      |
| 🔶 Detail           | s           |                         |                       |        |                |                  |          |        |        |        |        |            |           |          |        |                   |       | Uploa    | d to Hau  | IsPro    | Downloa | d from Ha    | JsPro  |
|                    |             |                         |                       |        |                |                  |          | 1      | ACH Pa | ayment | E      | CC P       | iyment    | =        | Debit  | Paymen            | t     | + 🖻      | -1        | Job/     | 1308/   |              |        |
| Action             | ns          |                         |                       |        |                |                  |          |        |        |        |        |            |           |          |        |                   |       | Filte    | r by Area | a        |         |              | _      |
| -                  |             | Action                  | Deci                  | ion Co | mment          |                  | licor    |        | Start  |        |        | Ling       | nt Com    | nlated S | atus F | ire .             |       |          | Name      | 9        | ٣       | Date up      | oaded  |
| 2                  | D           | one Temp                | ate v                 | ~      |                |                  | Joh      | n ~    | Thu    | 1/9/25 | 9:30 A |            |           |          |        | 0.76              |       | >        | Action    | nForms   | q       | 5            |        |
| e                  | •           |                         | A CONTRACTOR          |        |                |                  | -        |        |        | 4-740  |        |            | 1         |          |        |                   |       |          | Client    | t Docum  | ients Q | 5            | _      |
|                    | 1           |                         |                       |        |                |                  |          |        |        |        |        |            |           |          |        |                   |       |          | Drawi     | Ings     | 4       | 2            | _      |



#### 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. <u>To learn more about setting up notifications</u>, <u>please visit this section of the guide</u>.

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.

| nFlow <> Hom                  | e Process              | es Administration              | Impleme                            | ntation                               | Welc     | ome, Th   | eresa - Al   | BC Cou     | ntertop | LOG O     | л 🎸      | 0 🖸       | 4      | f 🤻        | <b>#</b> • | <b>A</b>        |           | NU C |
|-------------------------------|------------------------|--------------------------------|------------------------------------|---------------------------------------|----------|-----------|--------------|------------|---------|-----------|----------|-----------|--------|------------|------------|-----------------|-----------|------|
| Customer Job A                | ccount Sc              | heduler Inventory              | Vendor                             | Fabrication Fab Scheduler             | GridView | Repo      | orts Da      | hboard     | >       | User:     | Theresa  | ~ Act     | ion: 🔹 | ~ Futi     | are Days:  | 0 ToDos:        | Do No     | w    |
| DMER VIEW Custom<br>B VIEW Ja | er: #1693<br>ob: #4308 | 66 Theresa O v<br>Pool House v | Search<br>Search                   | CREATE QUOTE                          |          |           |              |            | _       |           |          |           |        |            |            |                 |           |      |
| ▲ Job Basic Info              |                        |                                |                                    |                                       |          | Area List | :            |            |         |           |          |           |        | Area       | # Search:  | Go              | to Record | ſ    |
| Name: Pool Hous               | e                      | C 2 ~                          | ProcessID                          | Standard 🗸 🗸                          |          | +         |              | s          | orî 🔻 4 | 🗘 Rv 🔻    | Name     | T Qnt     | ▼ Stat | us 1       | Price List | t 🛪 Material    | • Color   |      |
| Status Templated              | ~                      |                                | 🕑 Coi                              | tact Information                      | (        | 1         | Ø            | <b>Q</b> 0 | 6       | 886 0     | Kitchen  | 1         | Ter    | mplated 🗸  | Retail     | Granite 30      | M Abs^    |      |
| Type:                         | ~                      |                                | 👻 Per                              | sons                                  |          | 6         | Ø            | • 🖵        | 6       | 887 0     | Master B | ith 1     | Ter    | mplated ~  | Retail     | Cambria 3       | CM Blax   |      |
| Contact:<br>Details  Actions  |                        | ~                              | <ul> <li>Ass</li> <li>+</li> </ul> | igned Roles 🗴 🗶 Project Manager 🤟 Kin | • •      | *=<br>X ( |              |            |         |           | â AC     | H Paymen' | t      | 🖶 CC Paj   | /ment      | E Debit Pa      | > Yment   |      |
| +                             |                        | Action                         | Decis                              | on Comment                            | User     | Start     |              |            | Urgnt   | Completed | Status H | rs Sci    | h Lin  | k LastEdit | By LastEd  | itDate          | Chk li    |      |
| C                             | Done                   | Template                       | ~                                  | ~                                     | John 💊   | Thu       | 1/9/25 9:30  | A III      |         |           |          | 0.76      | )- 9   | Theresa    | abc 3/7/20 | 25 4:17:18 PM   |           |      |
| Ð                             | Done                   | Template Form Received         | ∼ na                               | ~                                     | Kim 💊    | r Mon     | 3/10/25 11:1 | 1A 🏢       |         |           |          | 1.00      | 9      | John       | 3/10/2     | 025 11:11:56 AM | : :       |      |
| History<br>Void               |                        |                                |                                    |                                       |          |           |              |            |         |           |          |           |        |            |            |                 |           |      |

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."

| onFlow. <       | > 1        | lome          | Process        | es Ad   | ministrati          | on I   | mplemen   | itation         |                  | Wel      | come, The | eresa - A  | BC Cou   | unterto | ps     | LOG OU | т 🧳        | 8      |        | f      | R        | <b>*</b> | ( 4      | 🖺 SA         | VE     | <b>י</b> ט כי |
|-----------------|------------|---------------|----------------|---------|---------------------|--------|-----------|-----------------|------------------|----------|-----------|------------|----------|---------|--------|--------|------------|--------|--------|--------|----------|----------|----------|--------------|--------|---------------|
| Customer        | Job        | Accou         | nt So          | heduler | Invento             | ry     | Vendor    | Fabrication     | Fab Scheduler    | GridViev | v Repo    | ts D       | ashboard | >       | ۲      | User:  | Theresa    | *      | Action | • • •  | Futu     | re Days: | 0 Тс     | Dos:         | Do No  | ow            |
| DMER VIEW       | Cust       | omer:<br>Job: | #1693<br>#4308 | 66 The  | eresa O<br>ol House | ×<br>× | Search    |                 | CREATE QUOTE     |          |           |            |          |         |        |        |            |        |        |        |          |          |          |              |        |               |
| Job E           | Basic Inf  | fo            |                |         |                     | _      |           |                 | _                |          | Area List |            |          |         |        |        |            |        |        |        | Areal    | Search:  |          | Go to        | Record |               |
| Name:           | Pool I     | House         |                | C a     | ) v                 |        | ProcessID | Standard v      |                  |          | +         |            |          | Sort T  | #^y    | Rv T   | Name       | т      | ont ⊤  | Status | ٣        | Price L  | ist 🔻 N  | Aaterial 7   | Color  |               |
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| Type:           |            | ~             |                |         |                     |        | - Pers    | ons             |                  |          | 6         | C          | <b>P</b> | 0       | 6887   | 0      | Master 8   | Bath 1 |        | Templa | ated 🗸   | Retail   | c        | ambria 3Cf   | A Bla  |               |
| Contact:        |            |               |                |         | ~                   |        | Assi      | gned Roles      |                  |          | 1         |            |          |         |        |        |            |        |        |        |          |          |          |              |        |               |
| Detai     Actio | ils<br>ons |               |                |         |                     | L      | +         | 🗸 🗶 Proje       | tt Manager 🗸 Kir | n v      |           |            |          |         |        |        | <u></u> AC | :Н Рау | ment   | 8      | CC Pay   | ment     | 8        | Debit Payr   | nent   |               |
| -               | ÷          |               |                | Action  |                     |        | Decision  | Comment         | 1                | Jser     | Start     |            | U        | irgnt C | omplet | ed     | Sta        | itus H | irs    | Sch I  | Link Las | tEditBy  | LastEdit | Date         | c      |               |
| 4               | 3          |               | Done           | Templat | e                   | ~      | ~         |                 |                  | John 🗸   | Thu 1/9/2 | 5 9:30 A   |          |         |        |        |            |        | 0.76   |        | ∿∧ Th    | eresaabc | 3/7/202  | 5 4:17:18 PM | A :    |               |
| £               | 9          |               | Done           | Comme   | nt                  | ~      | na 🗸      | A form has be   | en received      | Kim 🗸    | Mon 3/10  | /25 1:41 F |          |         |        |        |            |        | 1.00   |        | % the    | resaabc  | 3/10/20  | 25 1:44:41 P | м :    |               |
|                 | istory     | Γ             |                |         |                     |        |           |                 |                  |          |           |            |          | _       |        |        |            |        |        |        |          |          |          |              |        |               |
|                 |            |               |                |         |                     |        |           |                 |                  |          |           |            |          |         |        |        |            |        |        |        |          |          |          |              |        |               |



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.

| 62                | > Home           | Processe            | s Adminis            | tration       | Impleme   | ntation          |                  | Welco      | me, The   | eresa - | ABC Co   | unterto | ps   | LOG OUT | 47 🤅       |         | 4 6        | <b>%</b> |             | <b>A</b> | SAVE      | c      |
|-------------------|------------------|---------------------|----------------------|---------------|-----------|------------------|------------------|------------|-----------|---------|----------|---------|------|---------|------------|---------|------------|----------|-------------|----------|-----------|--------|
| MER VIEW          | Customer<br>Job  | : #16936<br>: #4308 | 6 Theresa<br>Pool Ho | O ~<br>ouse ~ | Search    | Fabrication      | Fab Scheduler    | GridView   | Repo      | rts (   | Dashboar | d >     |      | User:   | Theresa 🚿  | Acti    | on: * *    | Futu     | re Days: 0  | ToDos    | : []      | Do Now |
| Job B             | asic Info        |                     |                      |               |           |                  |                  | A          | rea List: |         |          |         |      |         |            |         |            | Area#    | Search:     |          | Go to R   | ecord  |
| Name:             | Pool House       |                     | ଓ ଝା 🔄               | -             | ProcessID | Standard         | ~                | -          | •         |         |          | Sort 🔻  | *^r  | Rv T    | Name 🔻     | Qnt 7   | Status     | ٣        | Price List  | τ Mate   | rial 🔻    | Color  |
| Status            | Templated        | ~                   |                      |               | 🕑 Cor     | tact Informatio  | on               |            | · ]       | Ø       | <b>P</b> | 0       | 6886 | 0       | Kitchen    | 1       | Templat    | ed 🗸     | Retail      | Grani    | te 3CM    | Abs ^  |
| Type:             |                  | ~                   |                      |               | Per:      | sons             |                  | Ę          | ۵<br>     | 8       | P        | 0       | 6887 | 0       | Master Bat | 1       | Templat    | ed 🗸     | Retail      | Camb     | oria 3CM  | Blar   |
| Contact:          |                  |                     |                      | /             | Ass       | igned Roles      |                  | 1          | =         |         |          |         |      |         |            |         |            |          |             |          |           |        |
| Detail     Action | ls               |                     |                      |               | +         | 🗸 🗶 Proje        | ect Manager 🗸 Ki | m 🗸 🤇      | ¢ <       |         |          |         |      |         | 🏦 АСН      | Payment | 8          | CC Payr  | nent        | E Del    | bit Payme | nt     |
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| 0                 | ,                | Done                | Template V           | Vectsion      | comment   |                  | John 🗸           | Thu 1/9/25 | 9:30 A    |         |          | npieteu |      | Statu   | 0.76       |         | Theres     | aabc 3   | /7/2025 4:1 | 7:18 PM  | : :       | 9r     |
| ç.                | •                | Done                | Comment ~            | na 🗸          | A form I  | nas been receive | d John v         | Mon 3/10/2 | 5 1:49 P  |         |          |         |      |         | 1.00       |         | % theres   | aabc 3   | /10/2025 1: | 49:27 PM |           |        |
| C His             | )<br>story<br>id |                     |                      |               |           |                  |                  |            |           |         |          |         |      |         |            |         |            |          |             |          |           |        |

#### Viewing Completed Forms in ActionFlow

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

| ActionFlow < > Home Processes Administration  | Implementation   | lcome, Theresa - ABC Countertops 🛛 🕼 🕼 🖓  | odavu 🥲 🛤 🌲 🖪 save  |
|---|--|---|---|
| Customer Job Account Scheduler Inventory  | Vendor Fabrication Fab Scheduler GridVie   | w Reports Dashboard > 🗈 User: Theresa 🗸 Action: * 🗸 I   | Future Days: 0 ToDos: Do Now 🗸 17   |
| CUSTOMER VIEW Customer: #169366 Theresa O v<br>JOB VIEW Job: #4308 & Pool House v     | Search CREATE QUOTE Search   |   |   |
| Job Basic Info Name: Pool House Status Templated  Type:   Contact:   Details  Actions | ProcessID     Standard <ul> <li>Contact Information</li> <li>Persons</li> <li>Assigned Roles</li> <li> <ul> <li>Yergett Manager</li> <li>Km</li> </ul> </li> </ul> | Area List:     Area# Search:     Co to Record       +     Sort T a T RV T Name T Ont T Statu       1     Image: Control of the search of the se | L Job Files I I I Job Files A I I I I I I I I I I I I I I I I I I           |
| Action<br>C Done Template<br>History<br>Void<br>View Voided                           | Decision Comment User  | Start Urgnt Completed Status Hrs Sch<br>Thu t/9/25 9:30 A Ⅲ 0.76 ■  | Kitchen Area Checklist, 6886.pdf     Pool House_Template Checklist_4308.pdf |



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<br>countertops  |
|---|
| Template Checklist  |
| Customer Name:<br>Theresa O   |
| Job Name:<br>Pool House   |
| Address:<br>12247 Manchester ct   |
| St. Louis MO, 63131   |
| Email:<br>theresa@gmail.com   |
| Phone:<br>3145558527  |
| Account:  |
| Additional Notes:   |
| How many brackets are needed?:<br>3   |
| Cabinets set and level:<br>True   |
| How did we do today?:<br>Excellent  |
| I, Theresa O, understand that granite is a natural product and may have variances such as color differences, veins, pits,<br>and fissures. I have been made aware that these are not defects but inherent qualities of the stone. |
| Today's Date:<br>January 9, 2025  |
| An  |
|   |



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.

|                                 | ABC<br>COUNTERTOP                    |
|---------------------------------|--------------------------------------|
| Area Checklist                  |                                      |
| Customer Name:<br>Theresa O     |                                      |
| Job Name:<br>Pool House         | Description: Includes template and I |
| Area Name:<br>Kitchen           | Fab Notes: 1                         |
| Address:<br>12247 Manchester ct | Alternative Options                  |
| St. Louis MO, 63131             | Customer Provided Sink:              |
| Email:                          | MatCostTest:                         |
| theresa@gmail.com               | Backsplash:                          |
| Phone:                          | Cabinets: v 2n                       |
| 3145558527                      | Cooktop Model: Dir                   |
| Account:                        | Cooking Unit:                        |
|                                 | Faucet Model:                        |
| Material:                       | Sink Model: Kohler 3322              |
| Granite SCM                     | Sink Location:                       |
| Color:<br>Absolute Black 3CM    | Demo/Tear Out Needed:                |
| Edge:<br>Bevel                  |                                      |
| Sink Model:<br>Kohler 3322      |                                      |

#### Line Items:

Liberteris. 1 Labor: Template Charge1 Faucet Layout: 1 Hole Center1 Cutout: Undermount11.67 Misc: Splash Per Linear Feet2 Granite 3CM: Absolute Black 3CM29.16 Labor: Labor for Slab Calculations2 Misc: Per Piece Charge15.91 Edge: Bevel

Inventory Items: Granite 3CM: Absolute Black 3CM, Length: 120.000, Depth: 55.000Granite 3CM: Absolute Black 3CM, Length: 120.000, Depth: 55.000