



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**.

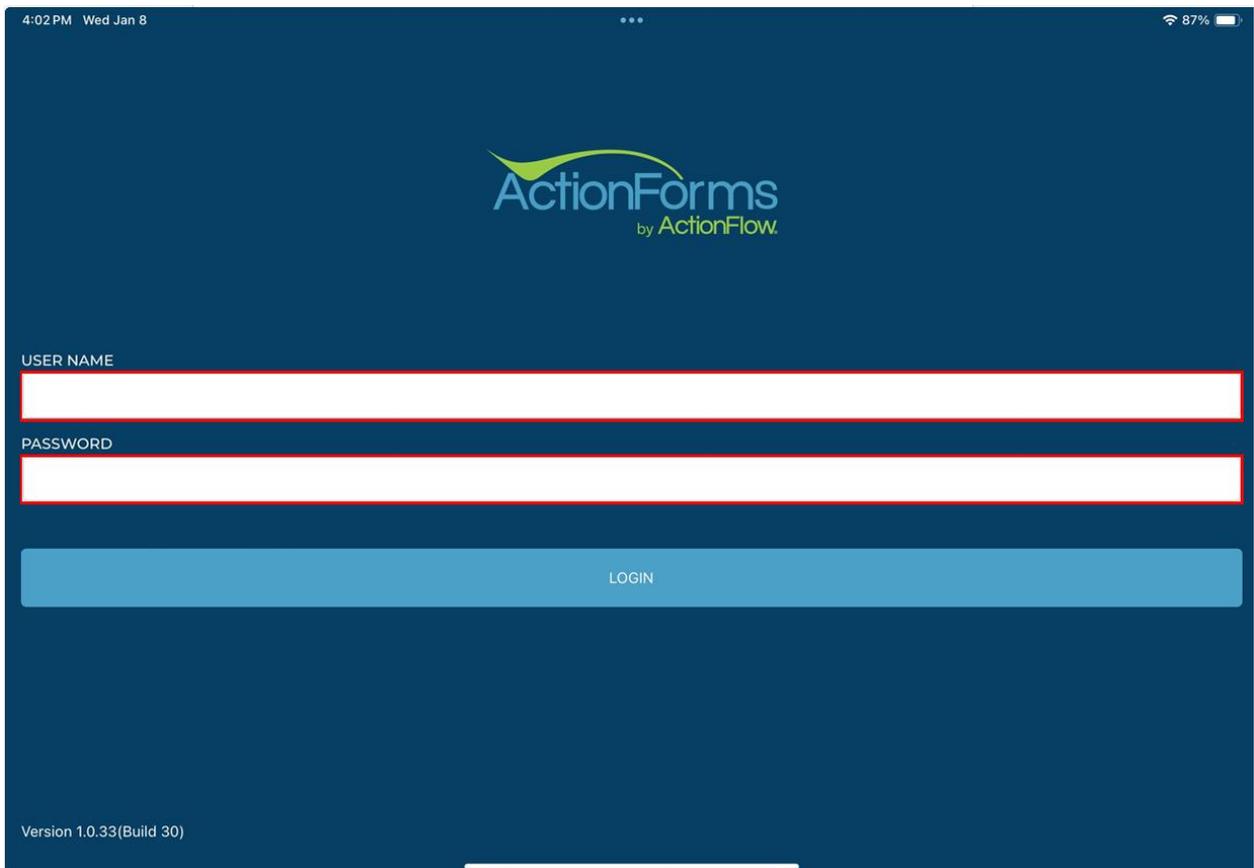


3. **Download** the App to your Device.

### Logging into the ActionForms App on your Tablet

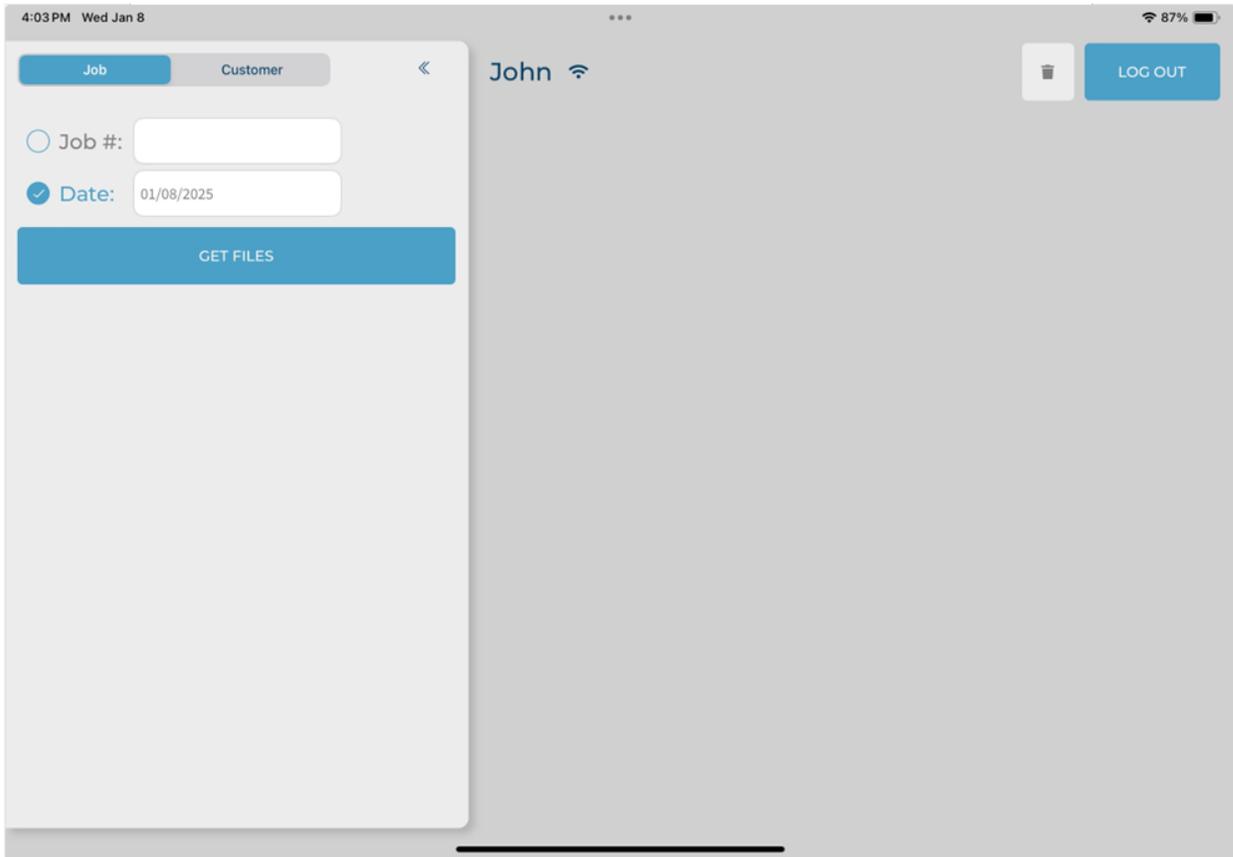
After downloading the app to your device, you can log in using your ActionFlow credentials. If you need assistance with your **User Name** or **Password**, feel free to reach out to an **Administrator** at your company.

1. Enter your **User Name** and **Password**.
2. Click **Login**.

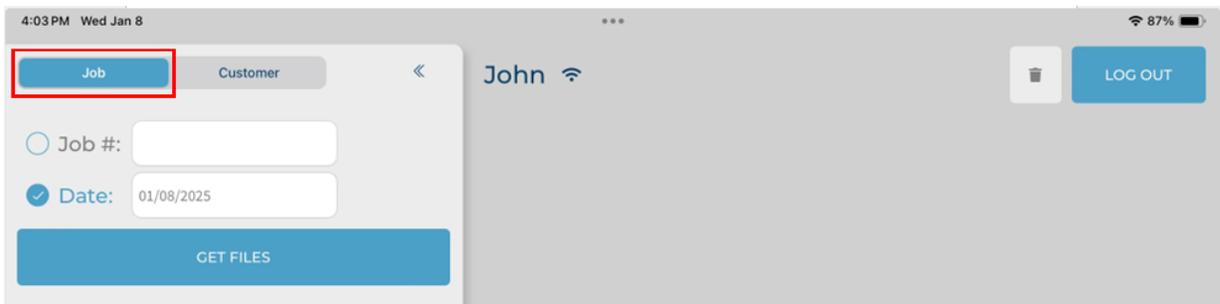
The image shows a screenshot of the ActionForms app login screen on a tablet. The background is dark blue with the ActionForms logo in the center. Below the logo, there are two white input fields with red borders. The first field is labeled "USER NAME" and the second is labeled "PASSWORD". Below these fields is a blue button with the text "LOGIN". At the bottom left, the text "Version 1.0.33(Build 30)" is visible. The top status bar shows the time "4:02 PM", the date "Wed Jan 8", and the battery level "87%".

## Navigating the ActionForms App on your Tablet

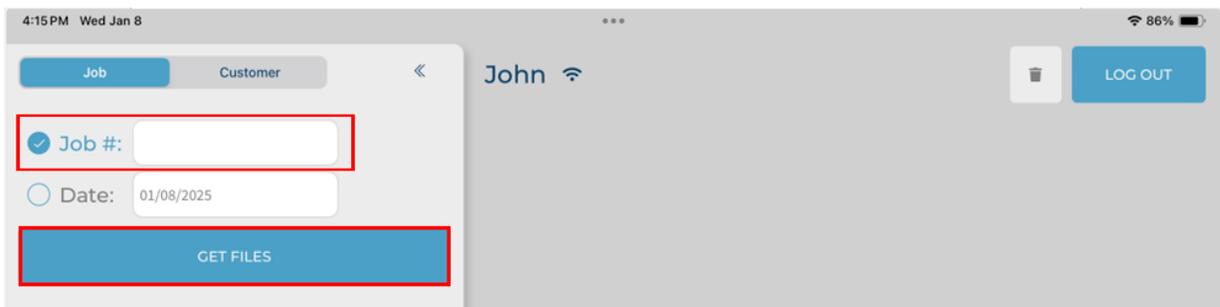
Now that you've logged into the app, let's take a quick tour of the home screen.



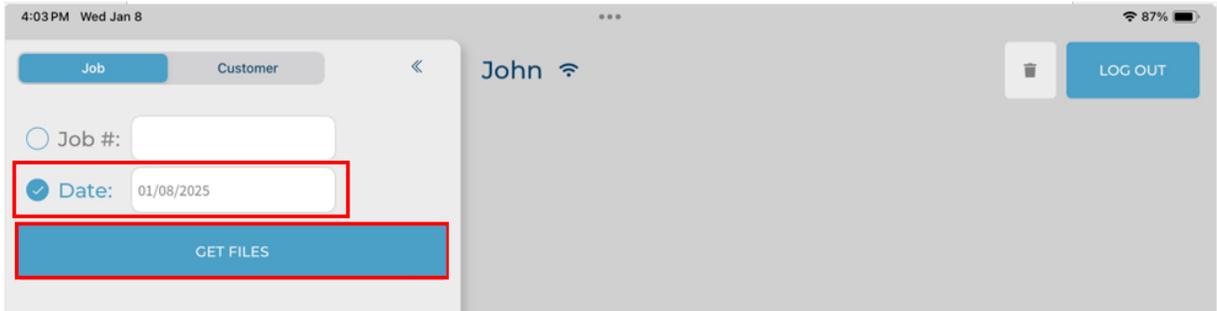
The tabs labeled **Job** and **Customer** at the top of the screen show forms associated with each **Parent Type**. By default, the app will open to the **Job** tab.



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



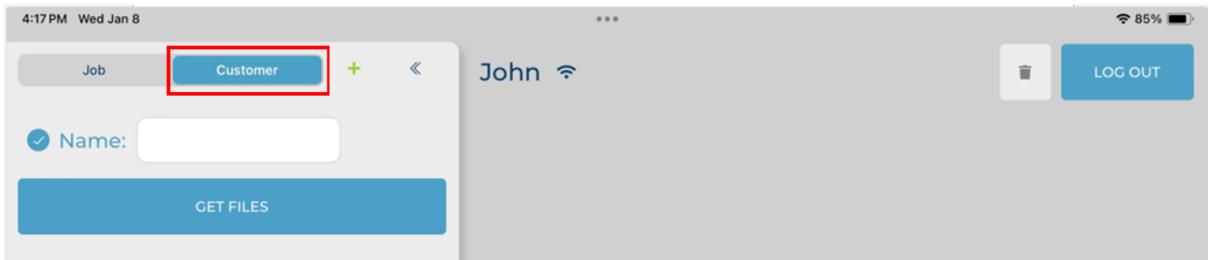
Retrieving forms by **Date** will download all forms for scheduled jobs assigned to the current user on that day.



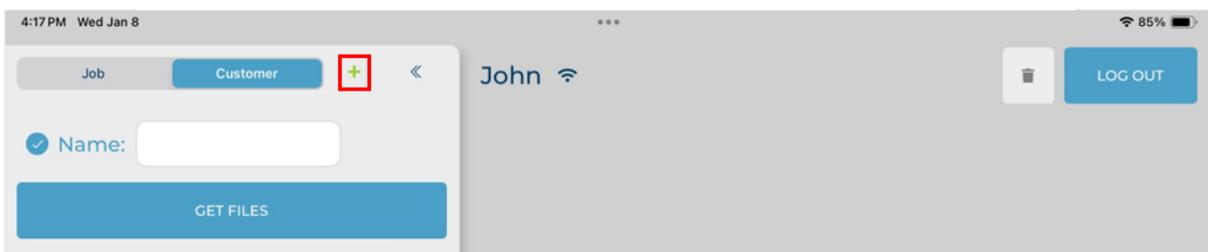
The sidebar controls (<< and >>) will collapse and expand the sidebar as needed.



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.



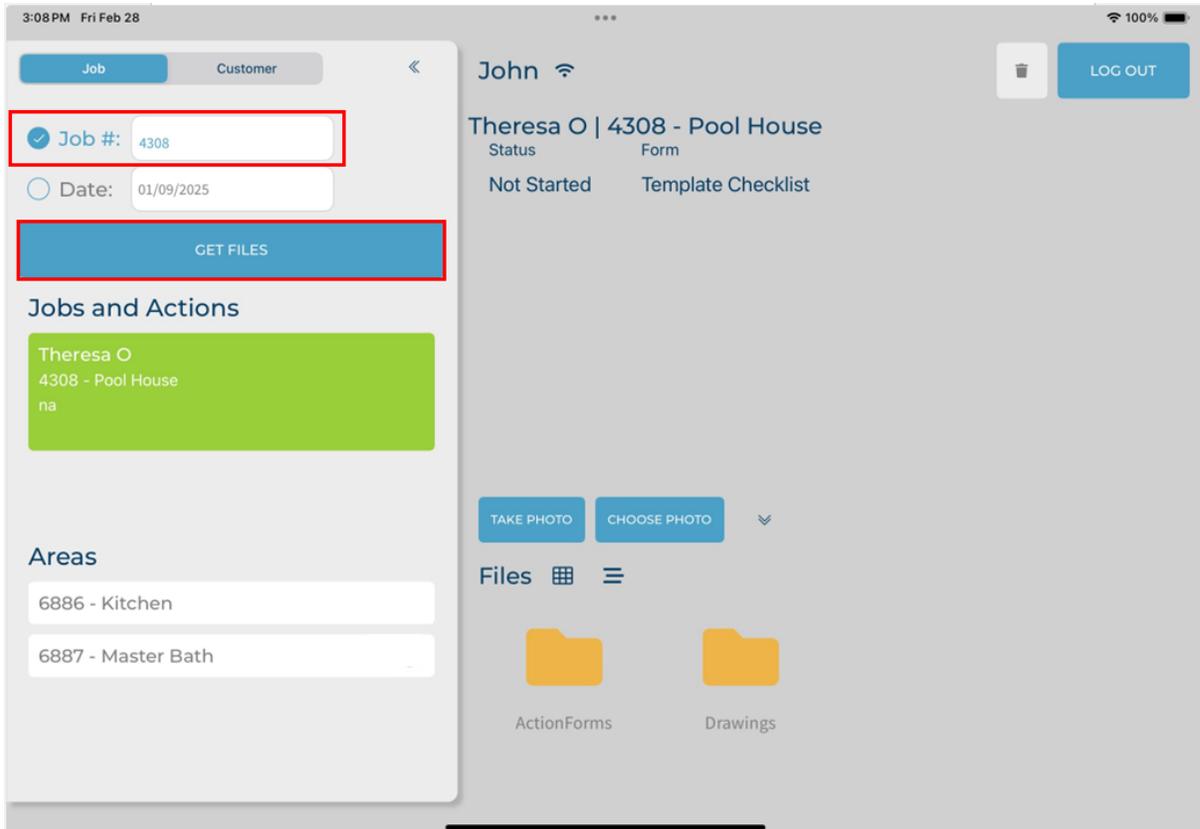
The **LOG OUT** button will securely log the user out of ActionForms.



## 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.

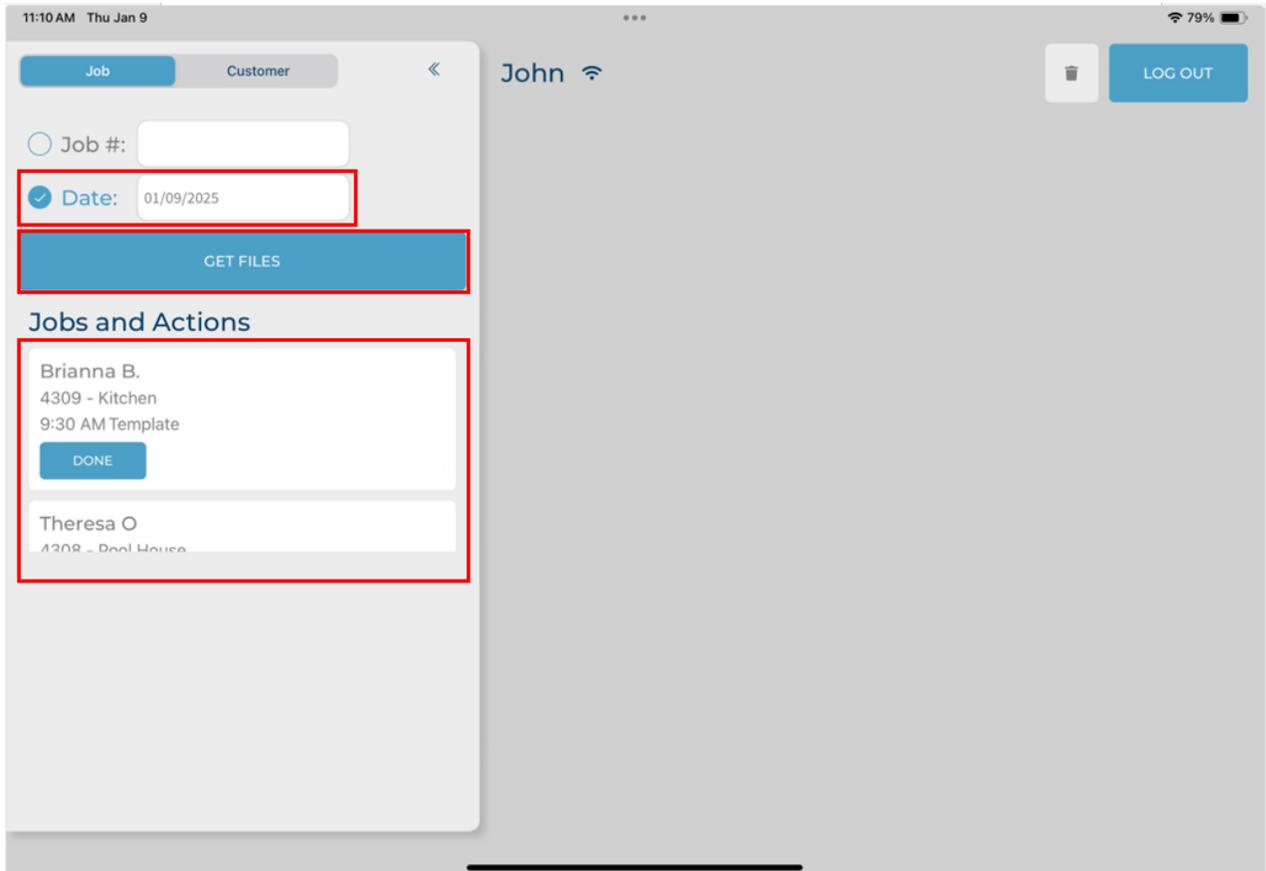
1. Make sure the device is **connected** to the internet.
2. **Check** the box next to **Job #**.
3. Enter the **Job Number** in the designated field.
4. Click **GET FILES** to retrieve the necessary forms.



## Downloading Forms by Date

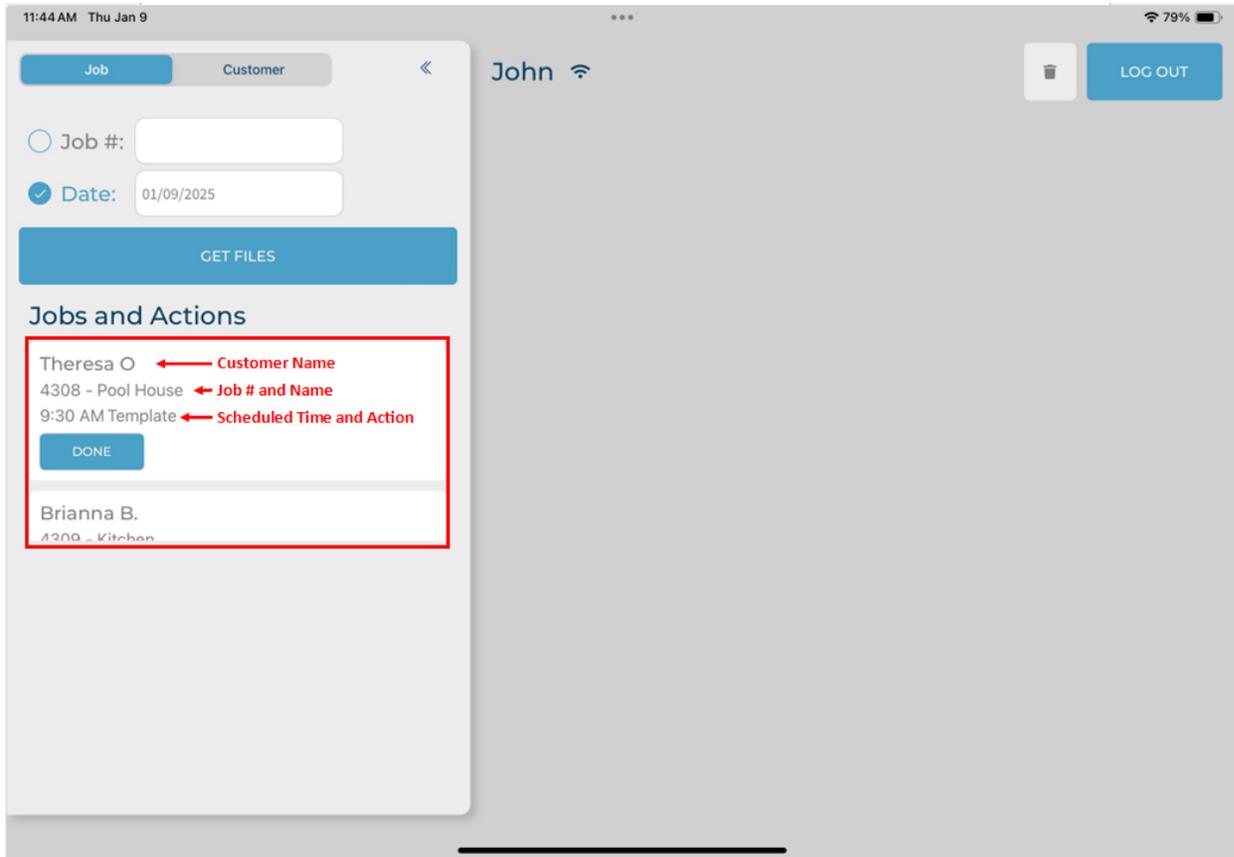
To access forms for all jobs linked to a particular date, users can use the **Date** search field to download the forms for the selected date.

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.

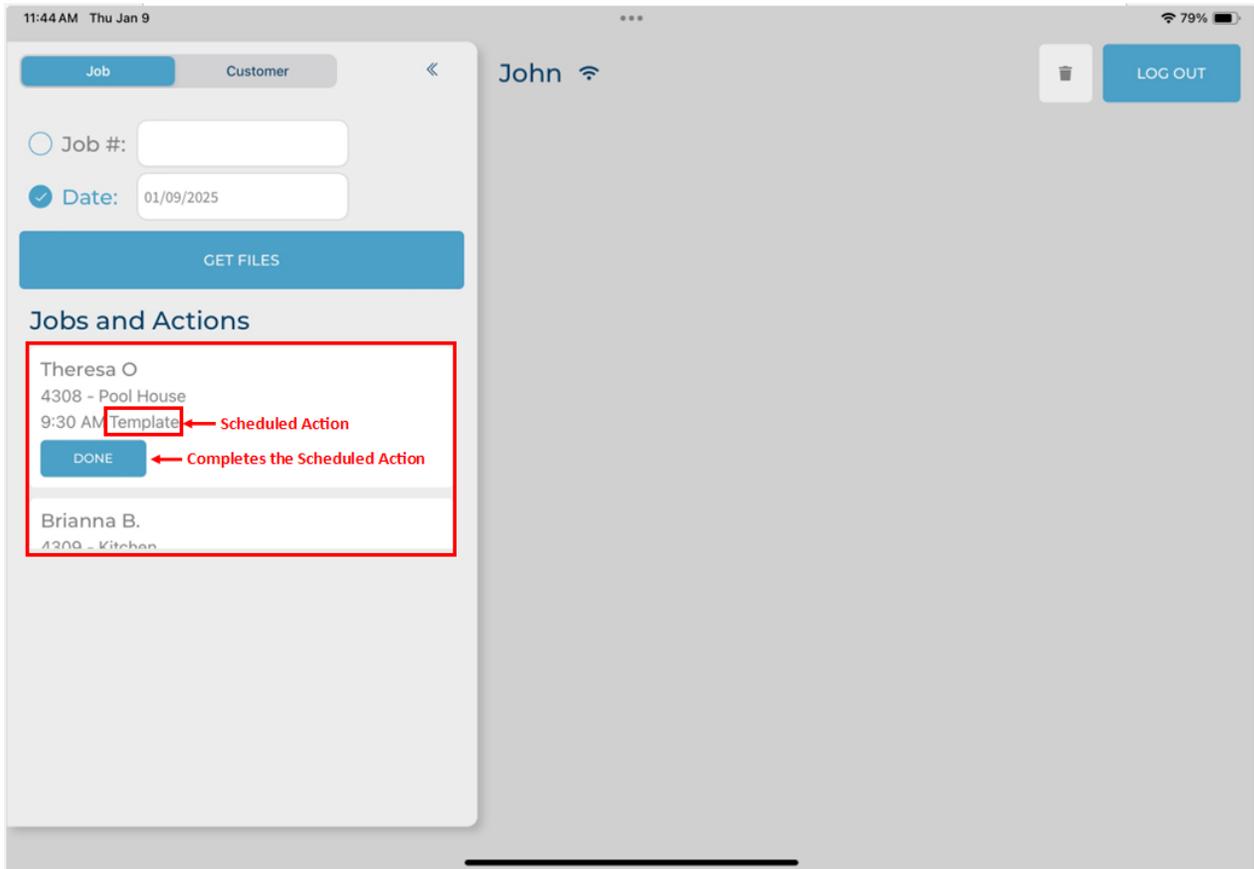


## Navigating Job Forms Downloaded to the Tablet

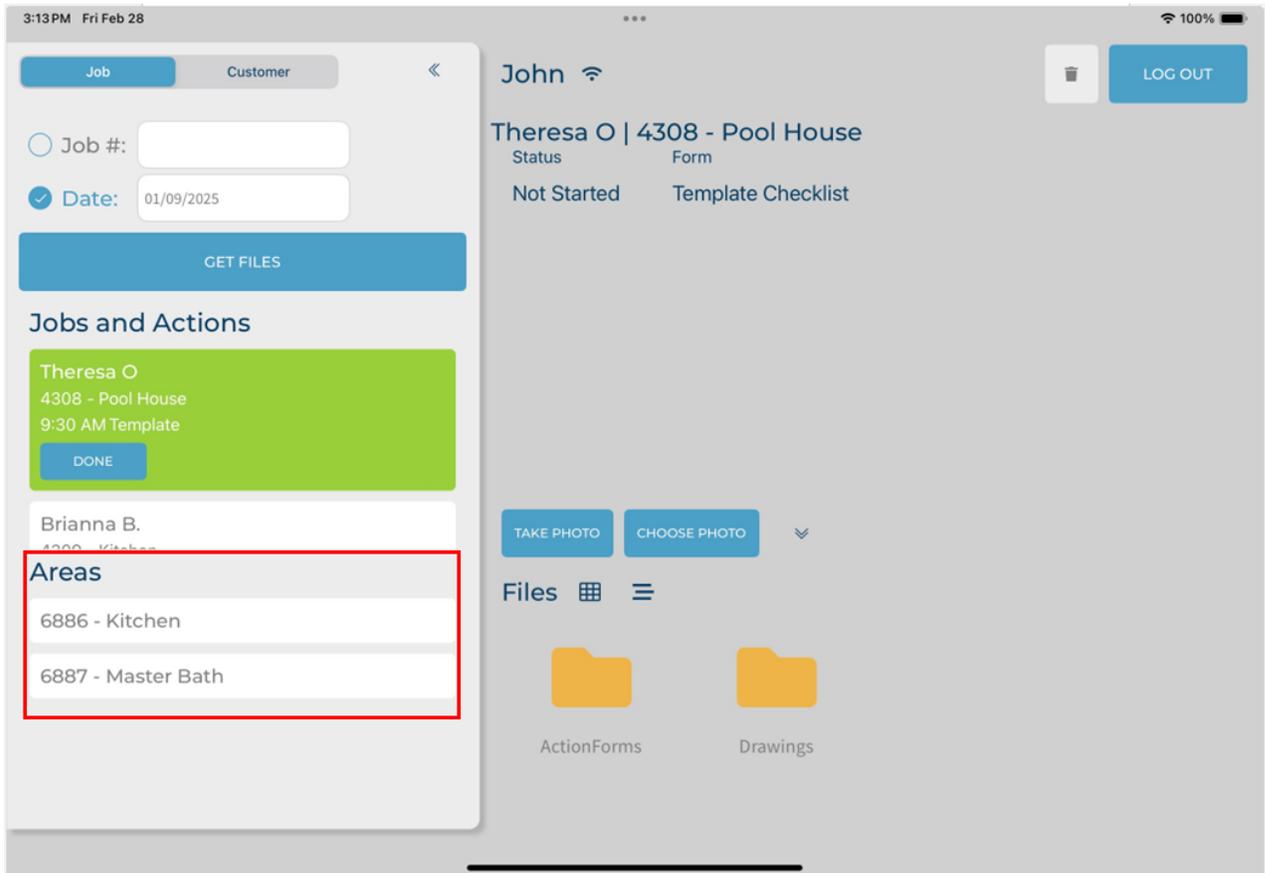
Once the jobs have been downloaded to the Tablet, you **don't need an internet connection** to access and complete the forms. You'll find all jobs under the **Jobs and Actions** section. The **Customer Name** will be displayed first, followed by the **Job Number and Name** and finally the **Scheduled Action and Time** if downloaded by **Date**.



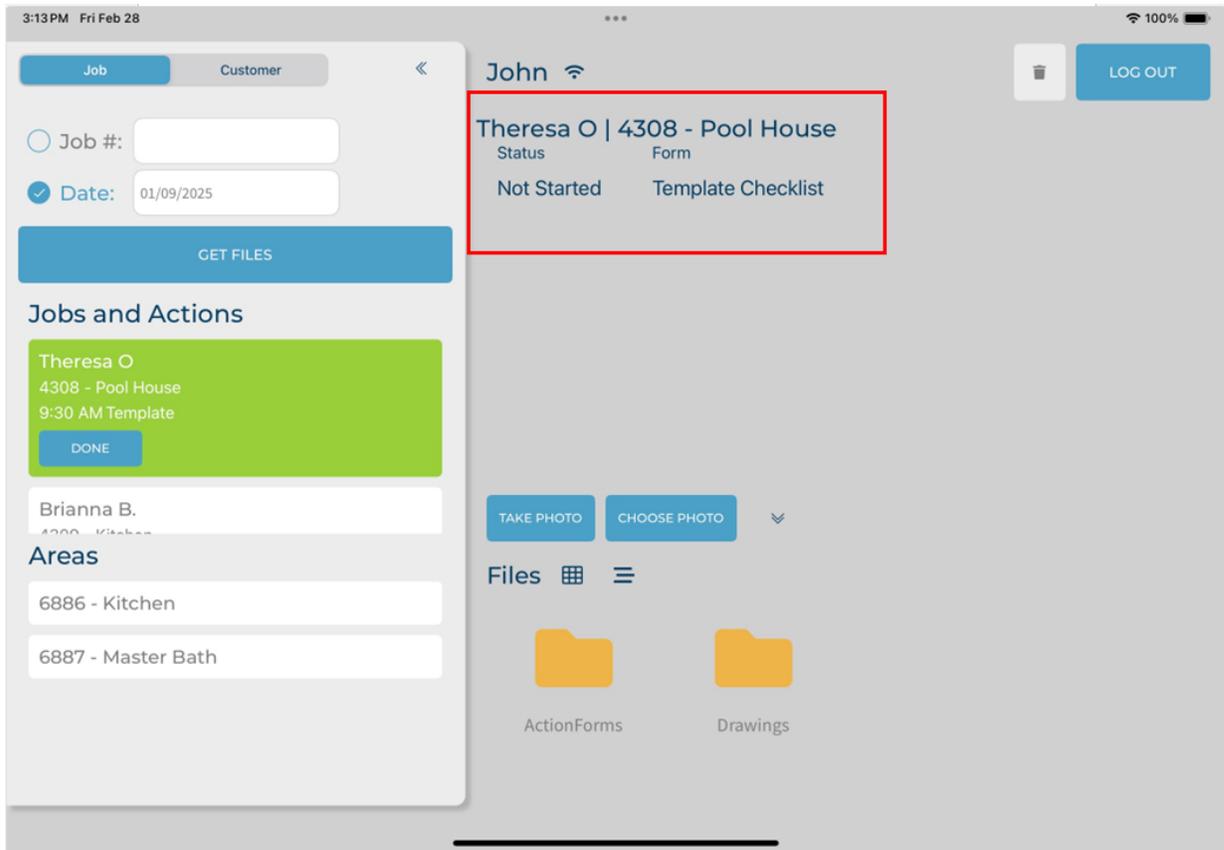
When forms are downloaded by **Date**, users can complete the associated **Scheduled Action** within ActionFlow by clicking the **Done** button. This will complete the **Scheduled Action** tied to the form. [For more information on completing Actions in the app, visit this section of this guide.](#)



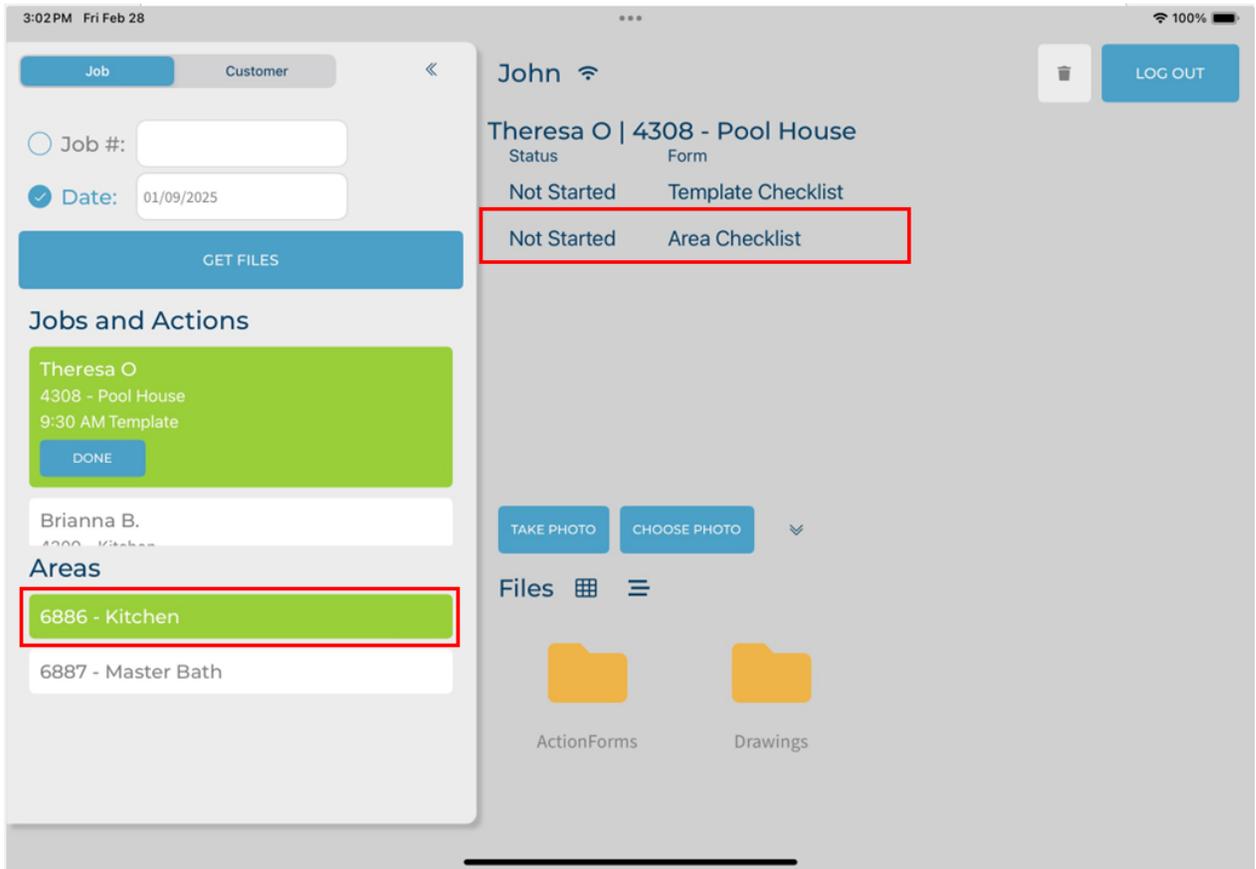
Upon selecting a job, which will be highlighted in green, the associated **Areas** will be displayed under the **Areas** section.



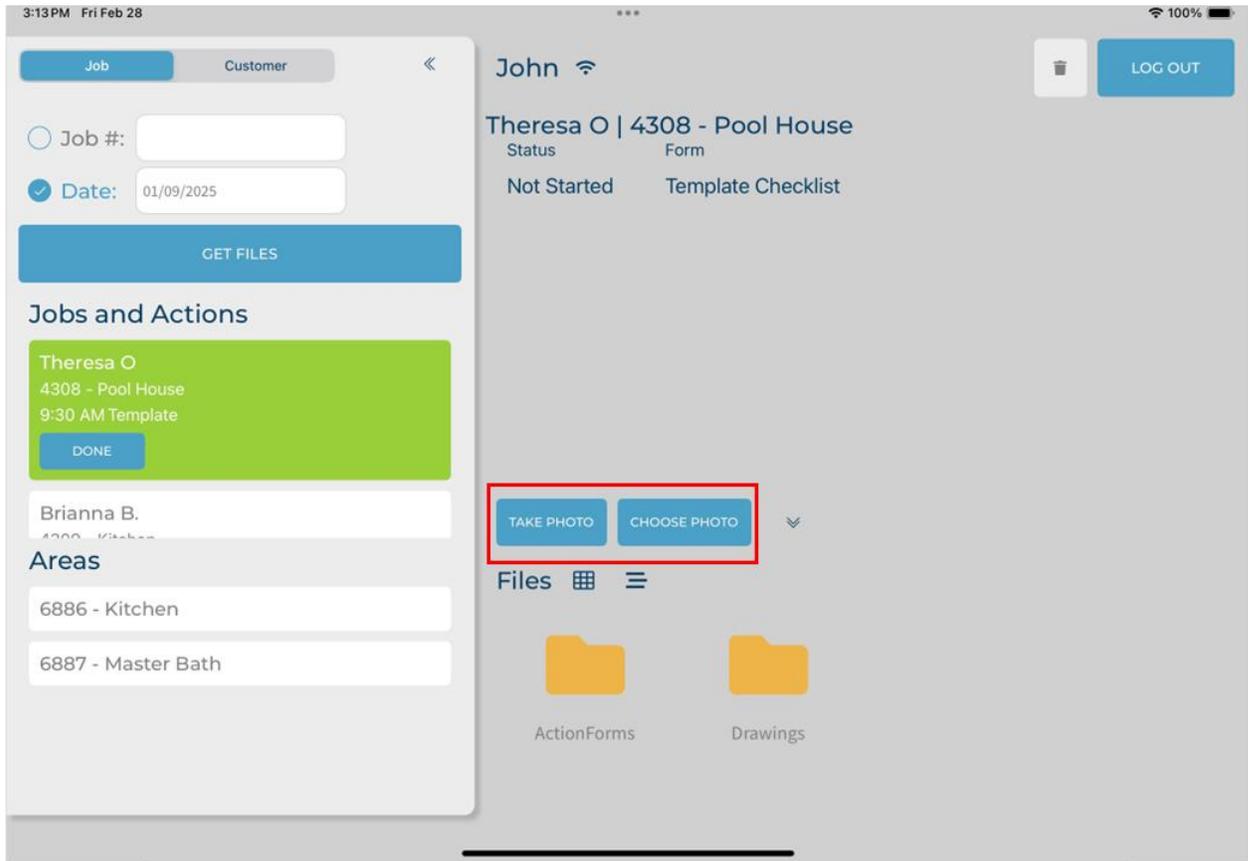
To the right, you will see information about the selected **Job** and all the forms linked to it.



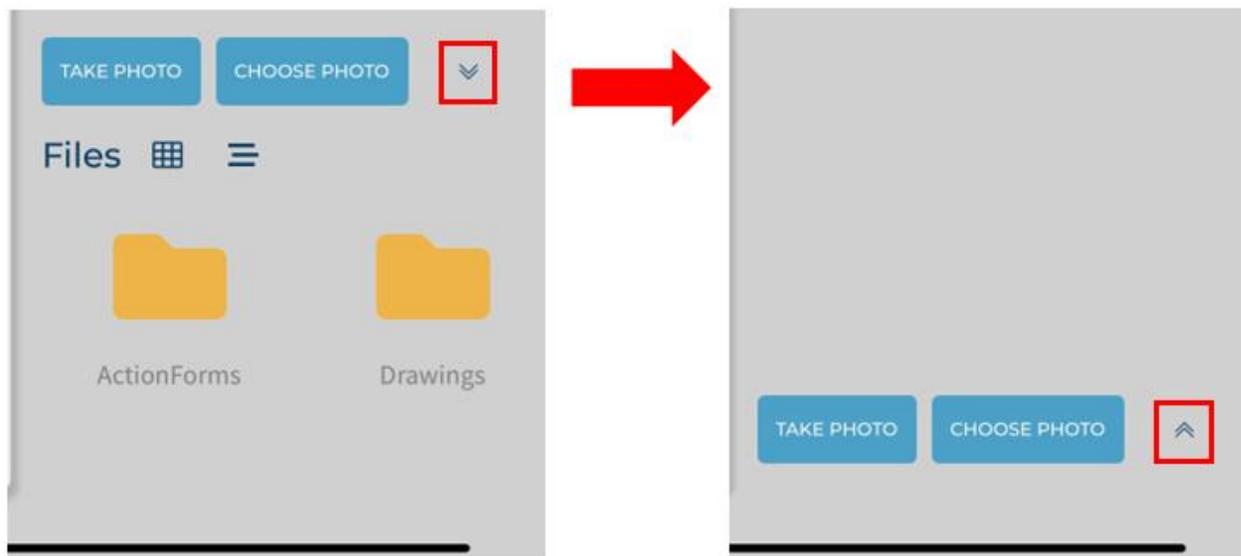
Forms specific to the **Area** must be viewed by selecting the desired **Area**. This view will show both **Job AND Area** forms.



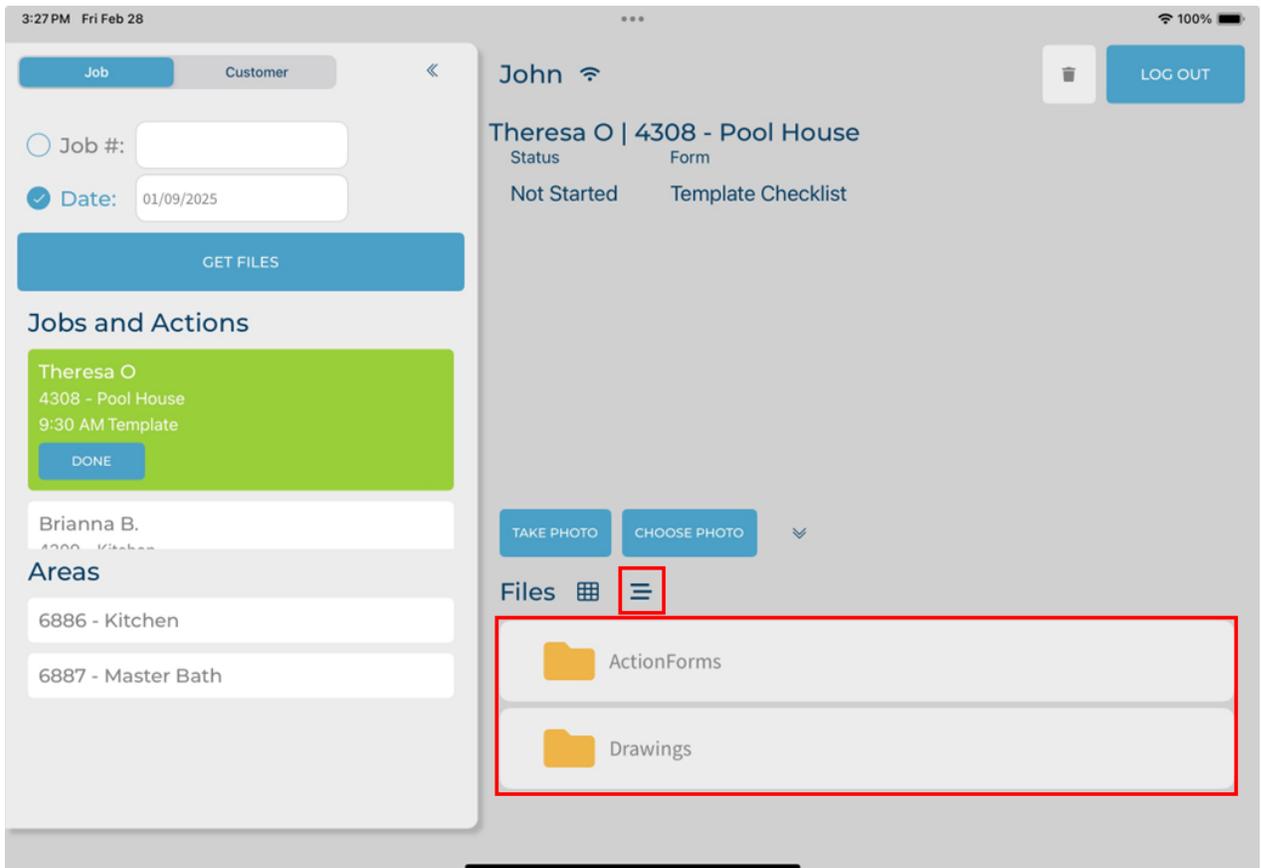
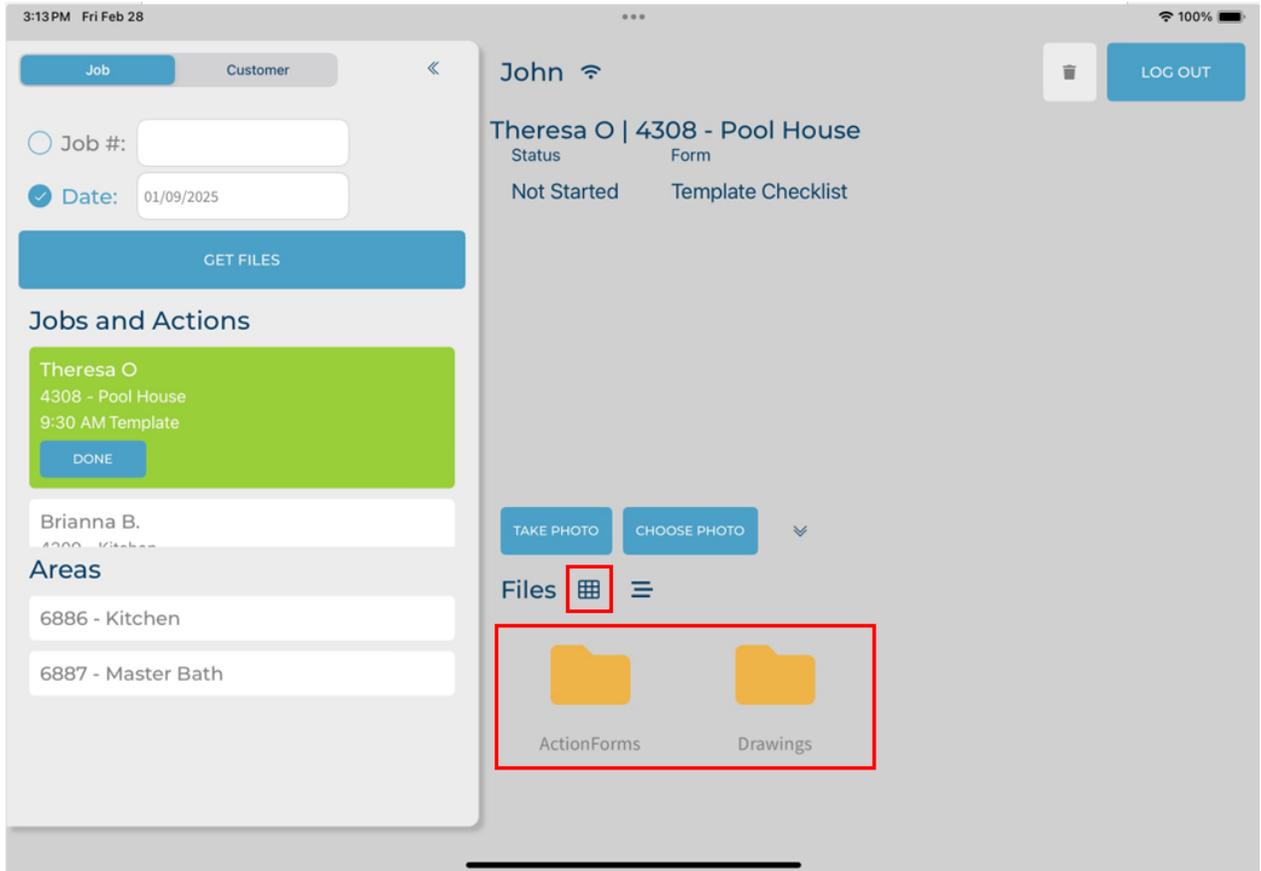
Below the available forms, there are options for managing files and adding photos to the **Job**. Users can capture a new photo using their device or choose from previously taken photos to include in the **Job Files**.



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.



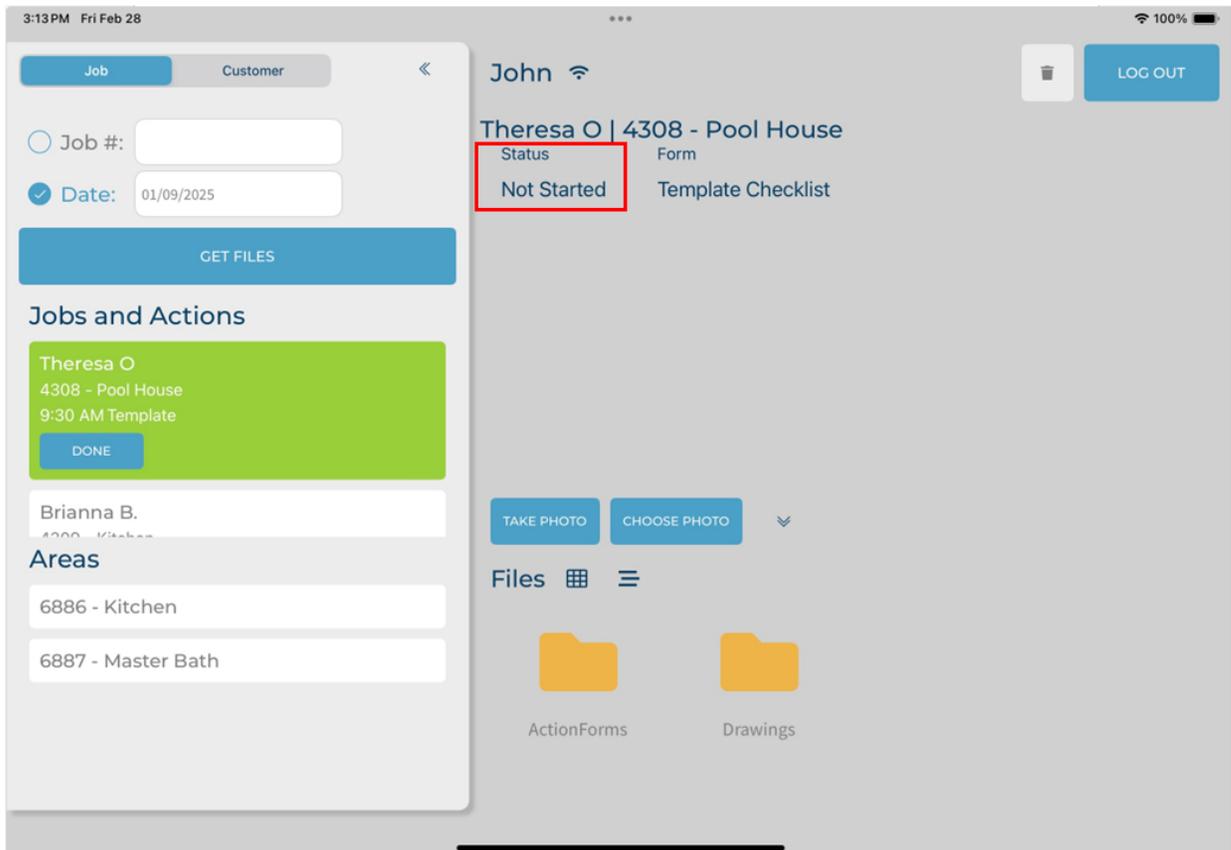
## Understanding Form Statuses

To help keep track of the form's progress, there are different statuses to indicate the stage of the form.

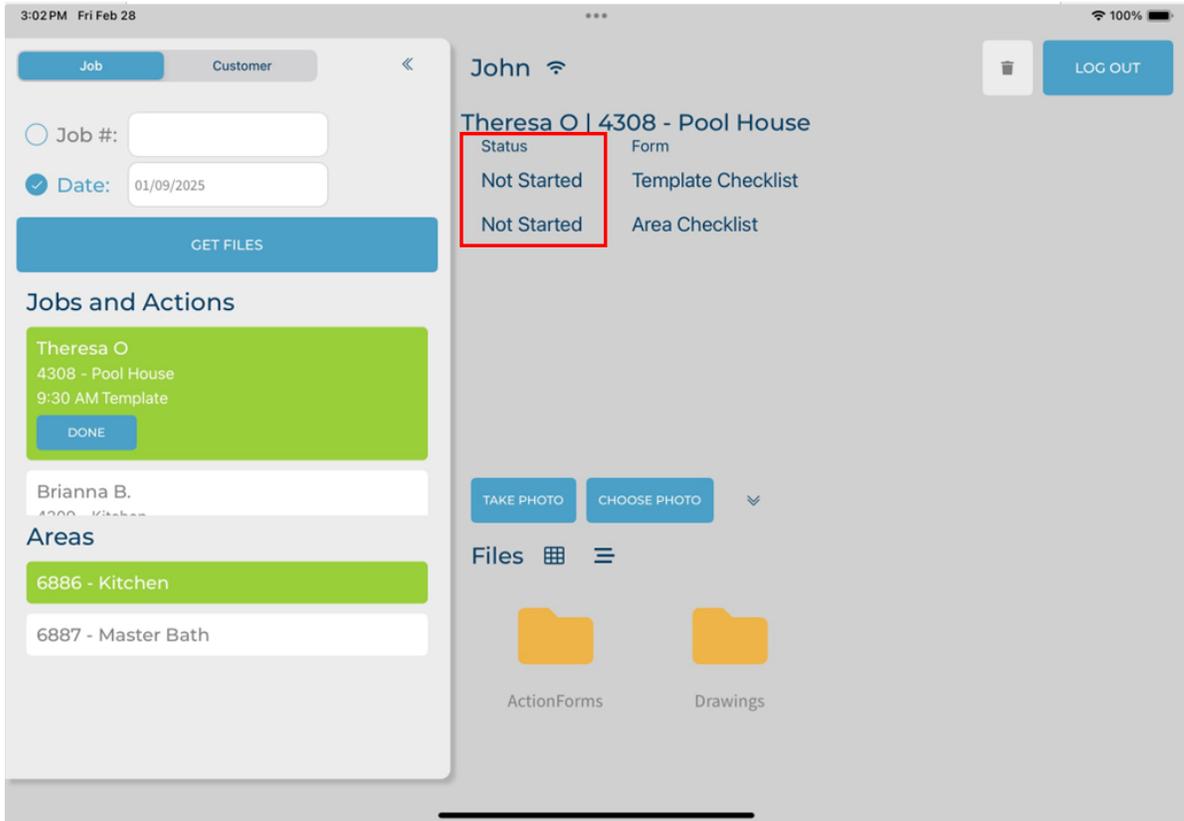
### Not Started Status

The **Not Started** status means the form has not been started yet.

View when **Job** is selected:

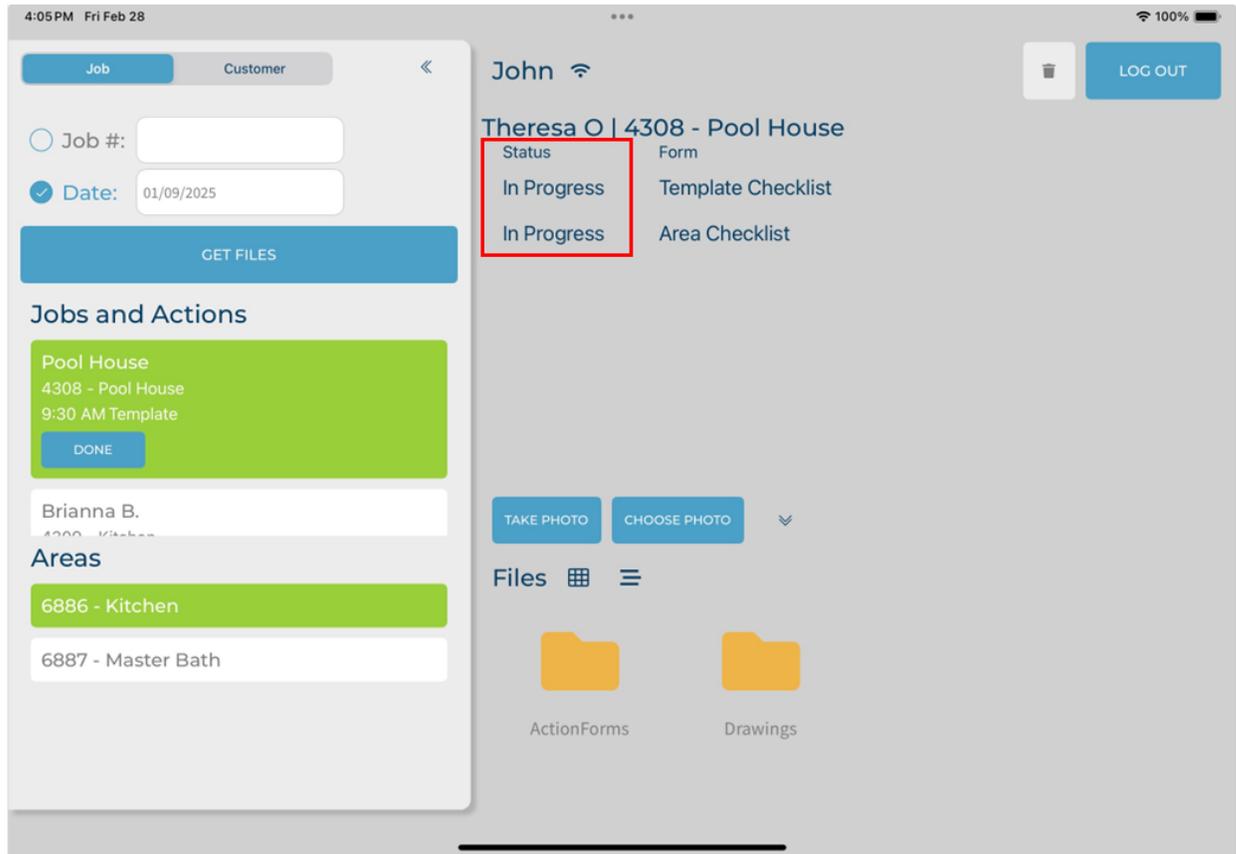


View when **Area** under a **Job** is selected:



## In Progress Status

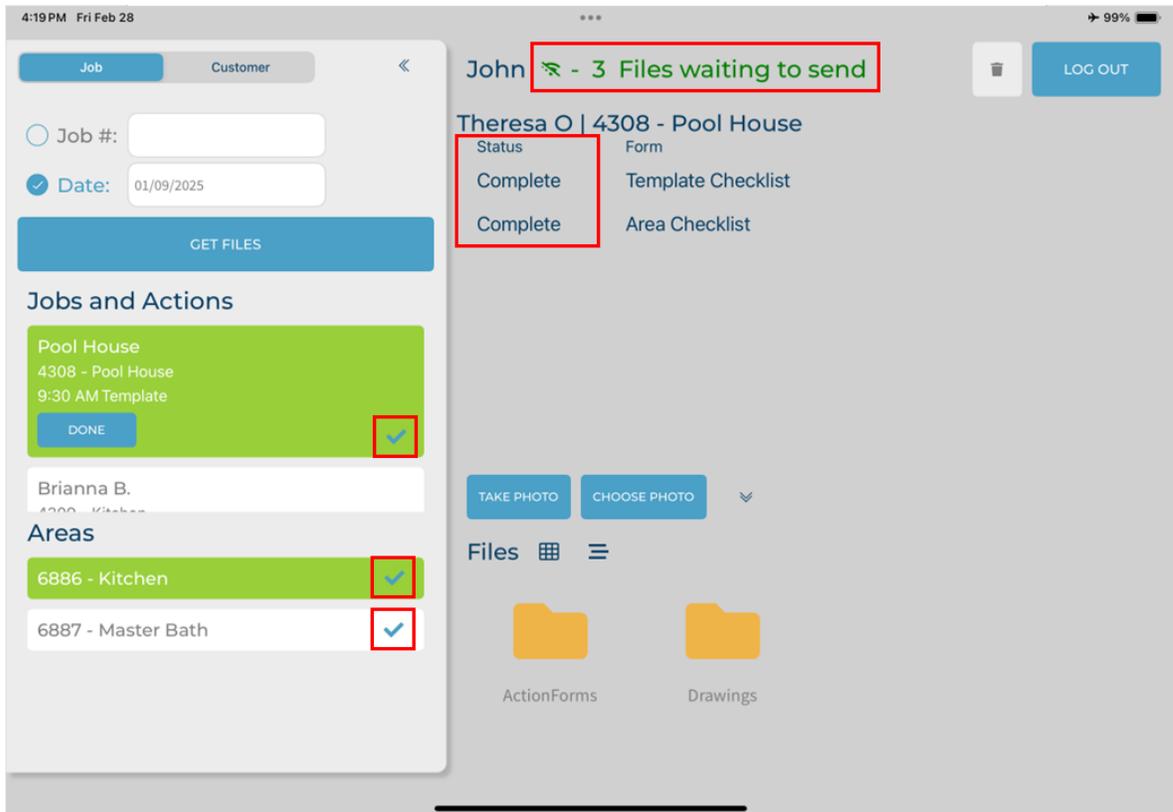
The **In Progress** status shows the form has been accessed and saved but not completed.



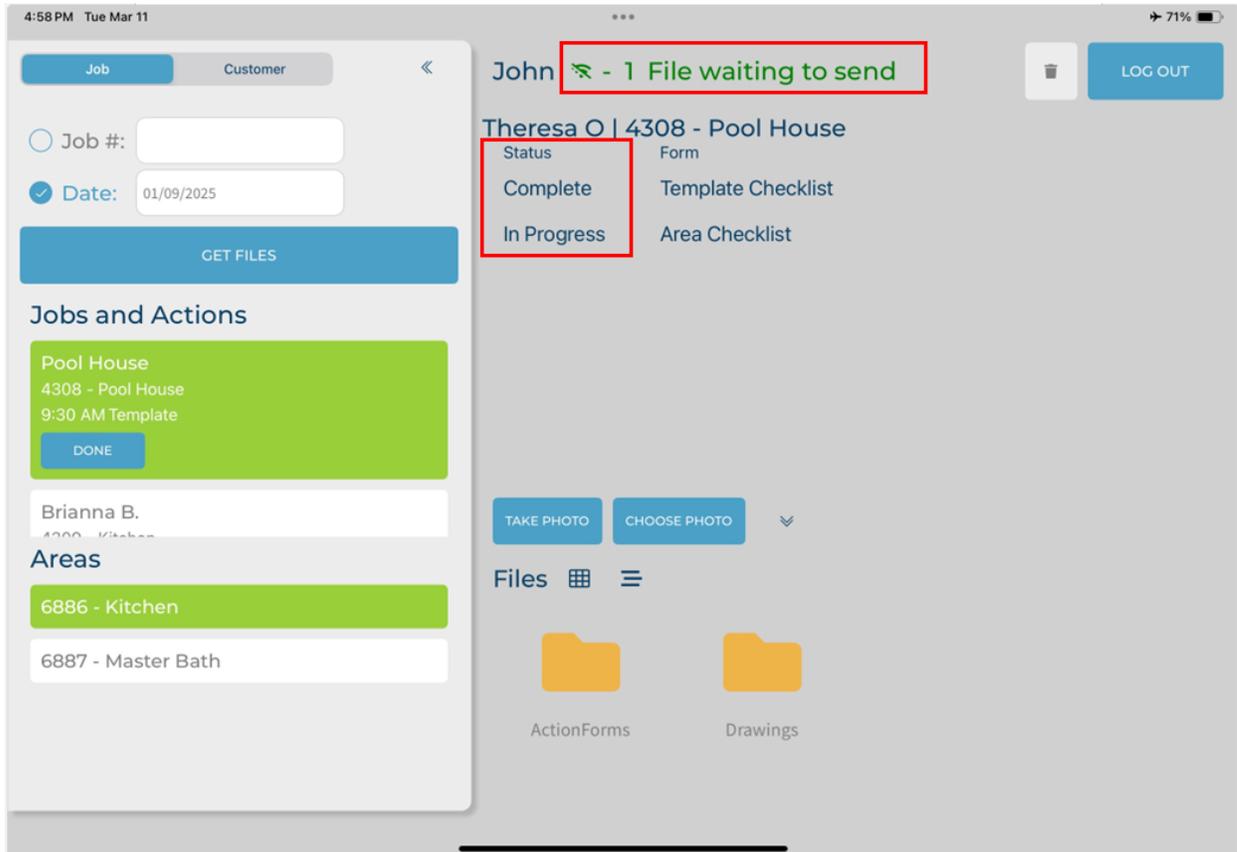
## Complete Status

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.

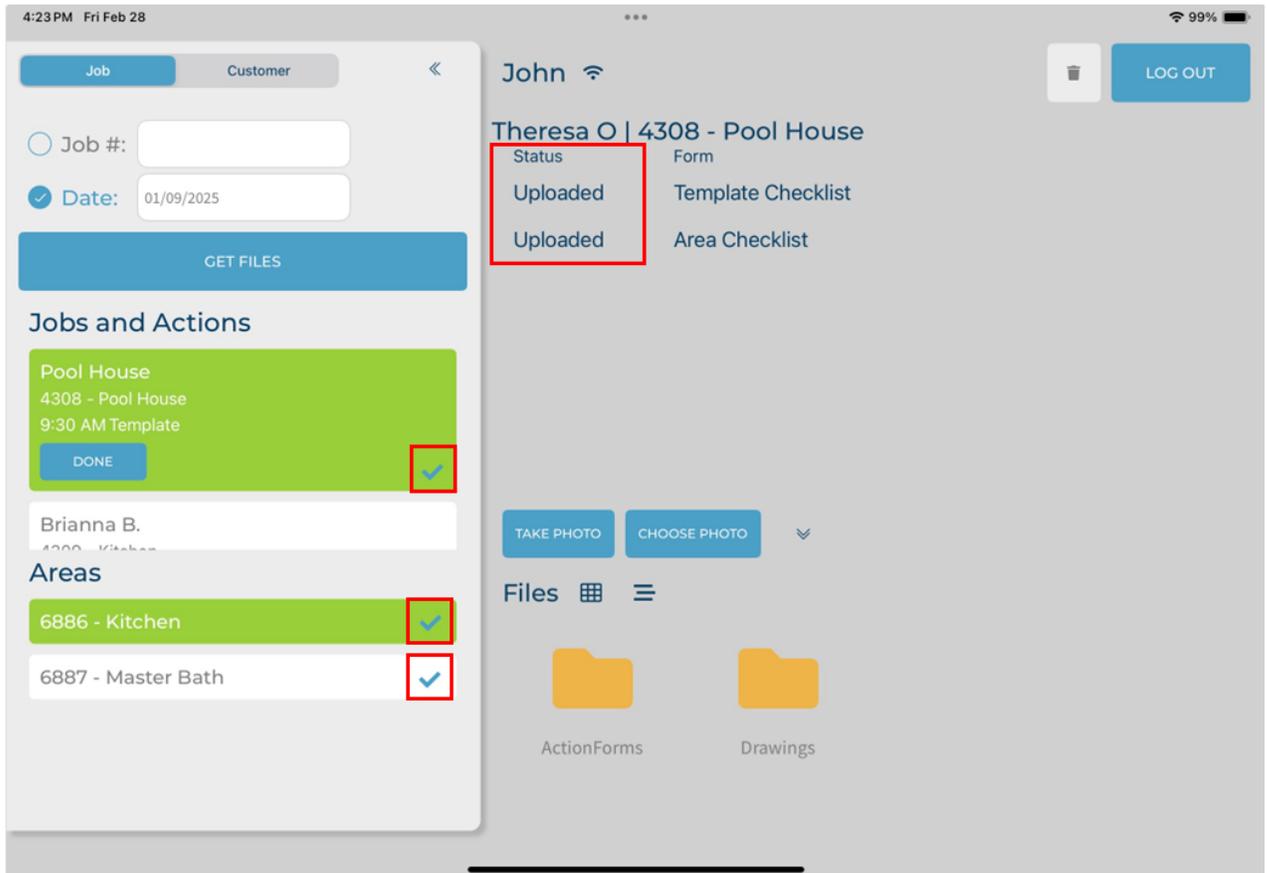


If all **Job** forms have been **Completed**, but there are still open area forms, the checkmark will not be displayed next to the **Job** until all **Area** forms are **Completed**. This serves as an indicator that there are still pending forms to complete.

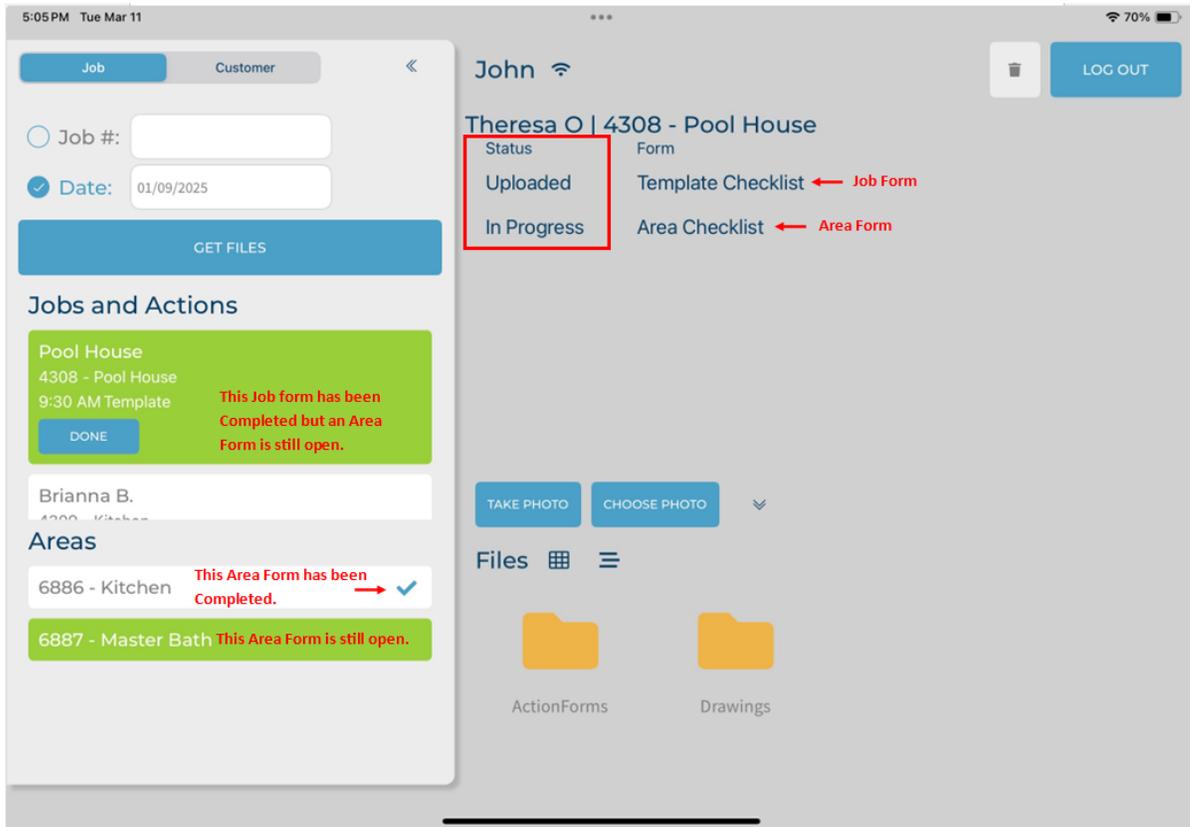


## Uploaded Status

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

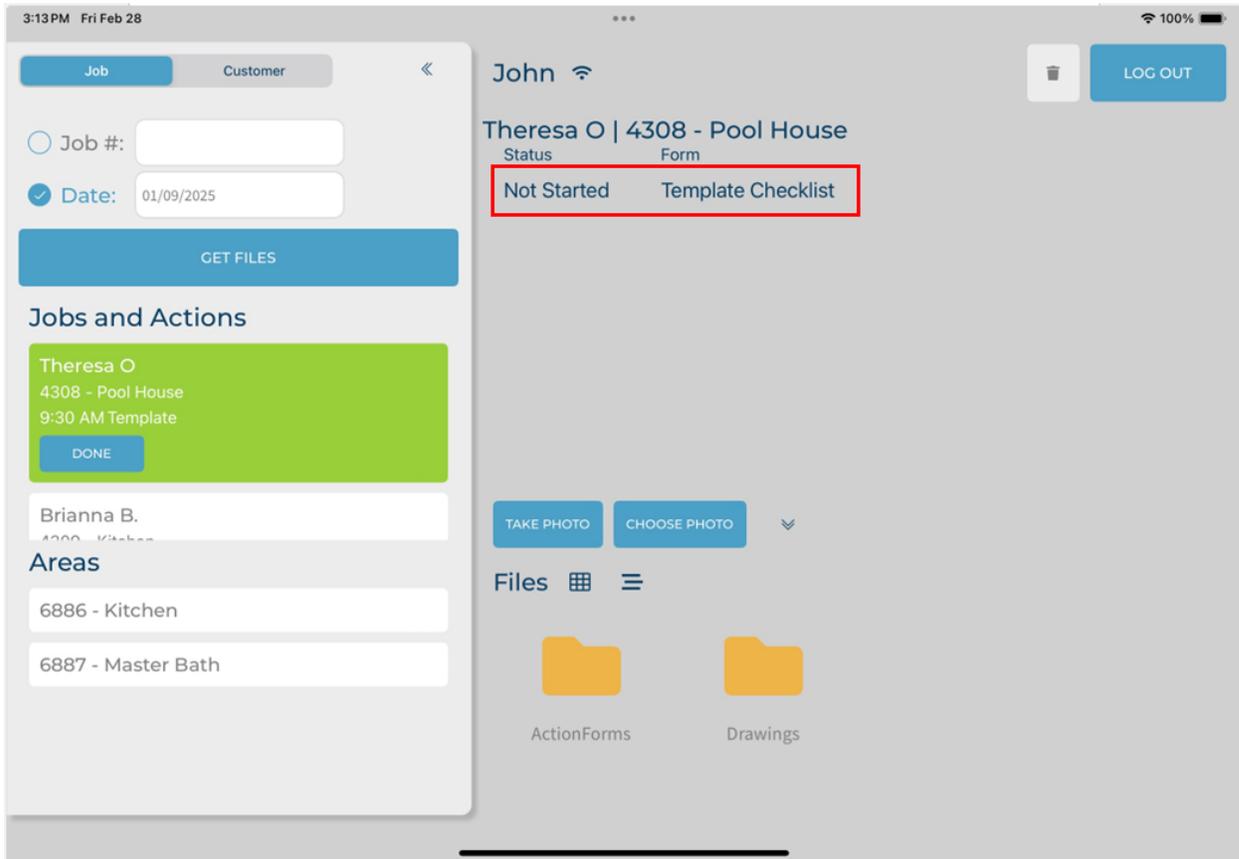


If all **Job** forms have been **Uploaded**, while there are still open **Area** forms, the checkmark will not show next to the **Job** until all **Area** forms are completed. This indicates that there are still pending forms to be **Completed**.



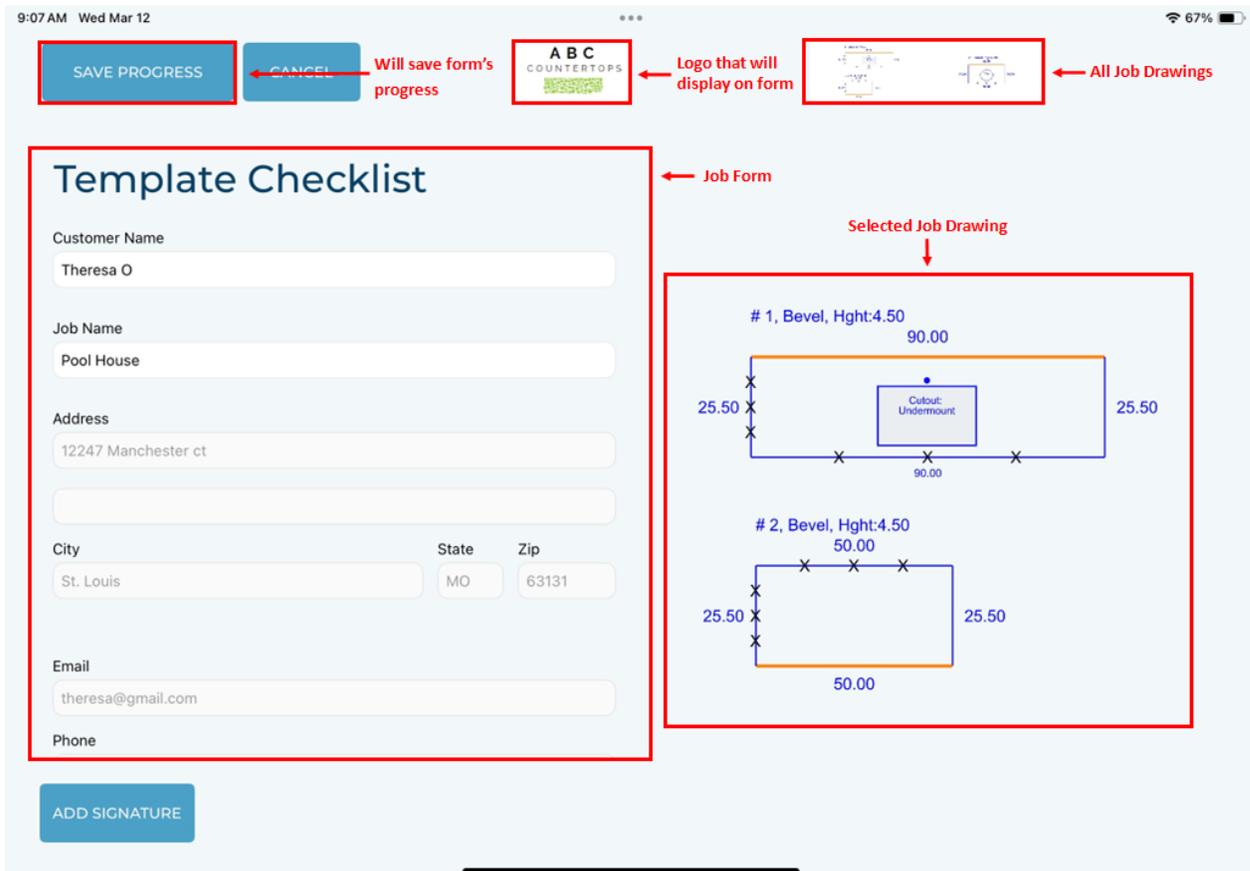
## Accessing and Completing Forms Downloaded to the Tablet

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**.

The screenshot displays a mobile application interface for an 'Area Form'. At the top, there is a status bar with the time '9:13 AM Wed Mar 12' and battery level '67%'. Below the status bar, there are three buttons: 'SAVE PROGRESS', 'CANCEL', and a logo for 'ABC COUNTERTOPS'. Red arrows point to these buttons with the text 'Will save form's progress' and 'Logo that will display on form'. To the right of the logo is a small thumbnail of a drawing, labeled 'Area Drawing Thumbnail'.

The main content area is divided into two sections. On the left is the 'Area Checklist' form, which contains the following fields:

- Customer Name: Theresa O
- Job Name: Pool House
- Area Name: Kitchen
- Address: 12247 Manchester ct
- City: St. Louis, State: MO, Zip: 63131
- Email: (empty field)

A 'SAVE AND COMPLETE' button is located at the bottom of the form. A red arrow points to the form with the text 'Area Form'.

On the right is the 'Area Drawing' section, which shows two diagrams. The top diagram is labeled '# 1, Bevel, Hght:4.50' and shows a rectangular area with dimensions 90.00 by 25.50. It includes a 'Cutout: Undermount' and several 'X' marks along the perimeter. The bottom diagram is labeled '# 2, Bevel, Hght:4.50' and shows a rectangular area with dimensions 50.00 by 25.50, also with 'X' marks along the perimeter. A red arrow points to the drawing with the text 'Area Drawing'.

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.

9:13 AM Wed Mar 12 67%

**A B C**  
COUNTERTOPS

## Area Checklist

Customer Name  
Theresa O

Job Name  
Pool House

Area Name  
Kitchen

Address  
12247 Manchester ct

City State Zip  
St. Louis MO 63131

Fmail

# 1, Bevel, Hght:4.50

# 2, Bevel, Hght:4.50

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.

9:29 AM Wed Mar 12 65%

SAVE PROGRESS CANCEL

**ABC**  
COUNTERTOPS

## Area Checklist

**Address**  
12247 Manchester ct

**City** **State** **Zip**  
St. Louis MO 63131

**Email**  
theresa@gmail.com

**Phone**  
3145558527

**Account**

SAVE AND COMPLETE

**# 1, Bevel, Hght:4.50**

**# 2, Bevel, Hght:4.50**

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 62%

ABC  
COUNTERTOPS

SAVE PROGRESSCANCEL

## Area Checklist

**Material**  
Granite 3CM

**Color**  
Absolute Black 3CM

**Edge**  
Bevel

**Sink Model**  
Kohler 3322

**Line Items**

- 1 Labor: Template Charge
- 1 Faucet Layout: 1 Hole Center
- 1 Cutout: Undermount
- 11.67 Misc: Splash Per Linear Feet
- 2 Granite 3CM: Absolute Black 3CM
- 29.16 Labor: Labor for Slab Calculations
- 2 Misc: Per Piece Charge
- 15.91 Edge: Bevel

SAVE AND COMPLETE

**# 1, Bevel, Hght:4.50**

**# 2, Bevel, Hght:4.50**

Furthermore, **Line Items** and/or **Inventory Items** within an **Area** Form will be displayed below the **Area Details** section in a **Read-Only** format.

7:38 AM Thu Mar 13 57%

ABC  
COUNTERTOPS

## Area Checklist

**Line Items**

- 1 Labor: Template Charge
- 1 Faucet Layout: 1 Hole Center
- 1 Cutout: Undermount
- 11.67 Misc: Splash Per Linear Feet
- 2 Granite 3CM: Absolute Black 3CM
- 29.16 Labor: Labor for Slab Calculations
- 2 Misc: Per Piece Charge
- 15.91 Edge: Bevel

**Inventory Items**

- Granite 3CM: Absolute Black 3CM, Length: 120.000, Depth: 55.000
- Granite 3CM: Absolute Black 3CM, Length: 120.000, Depth: 55.000

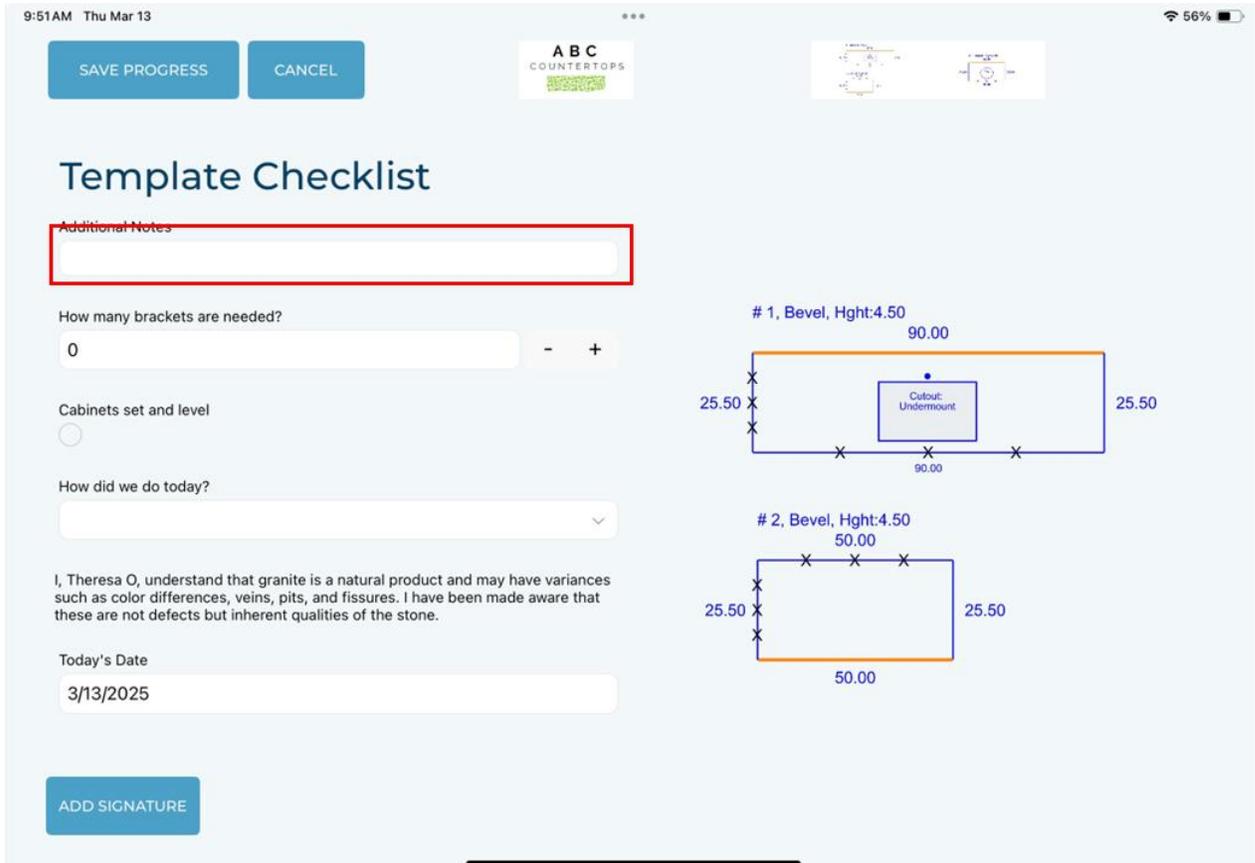
**# 1, Bevel, Hght:4.50**

**# 2, Bevel, Hght:4.50**

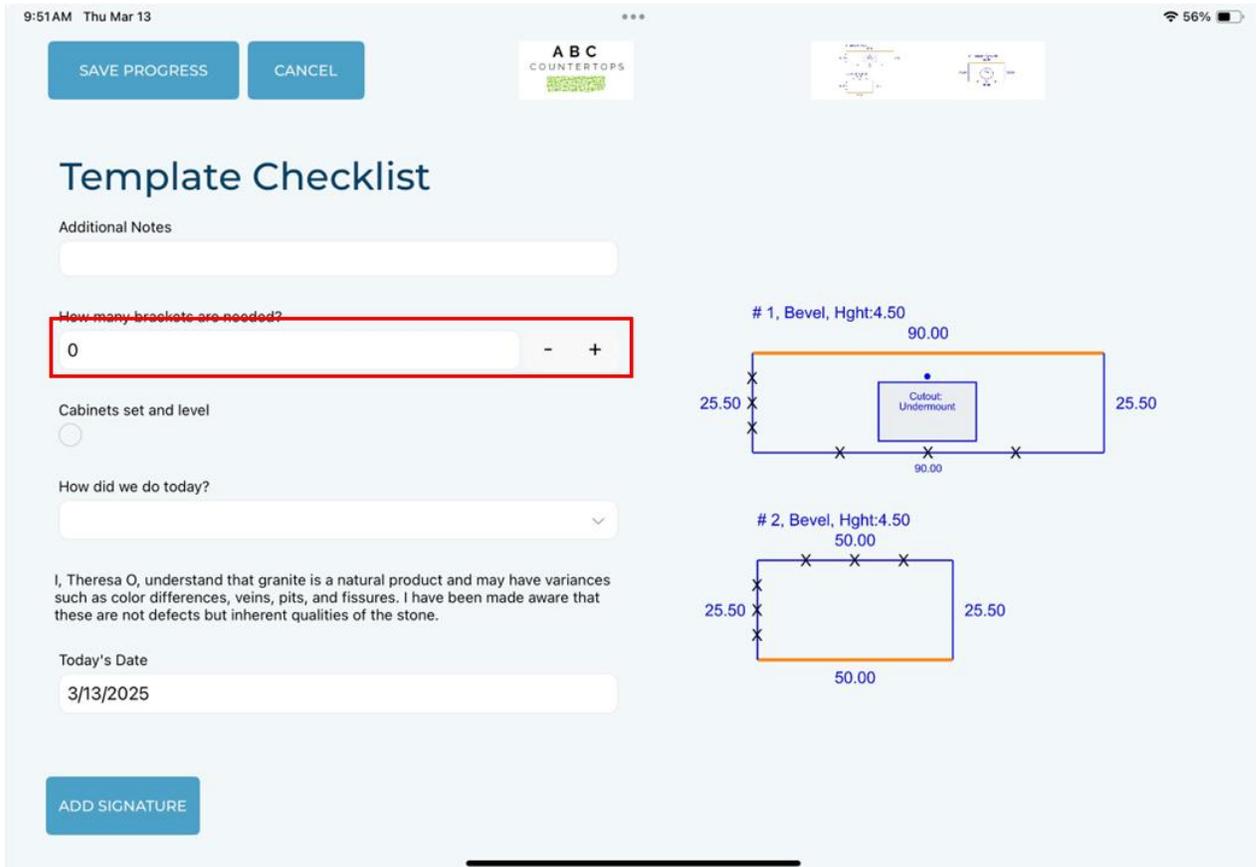
SAVE AND COMPLETE

When **Custom Field** options have been added by your Administrator, various input types allow for different forms of data entry.

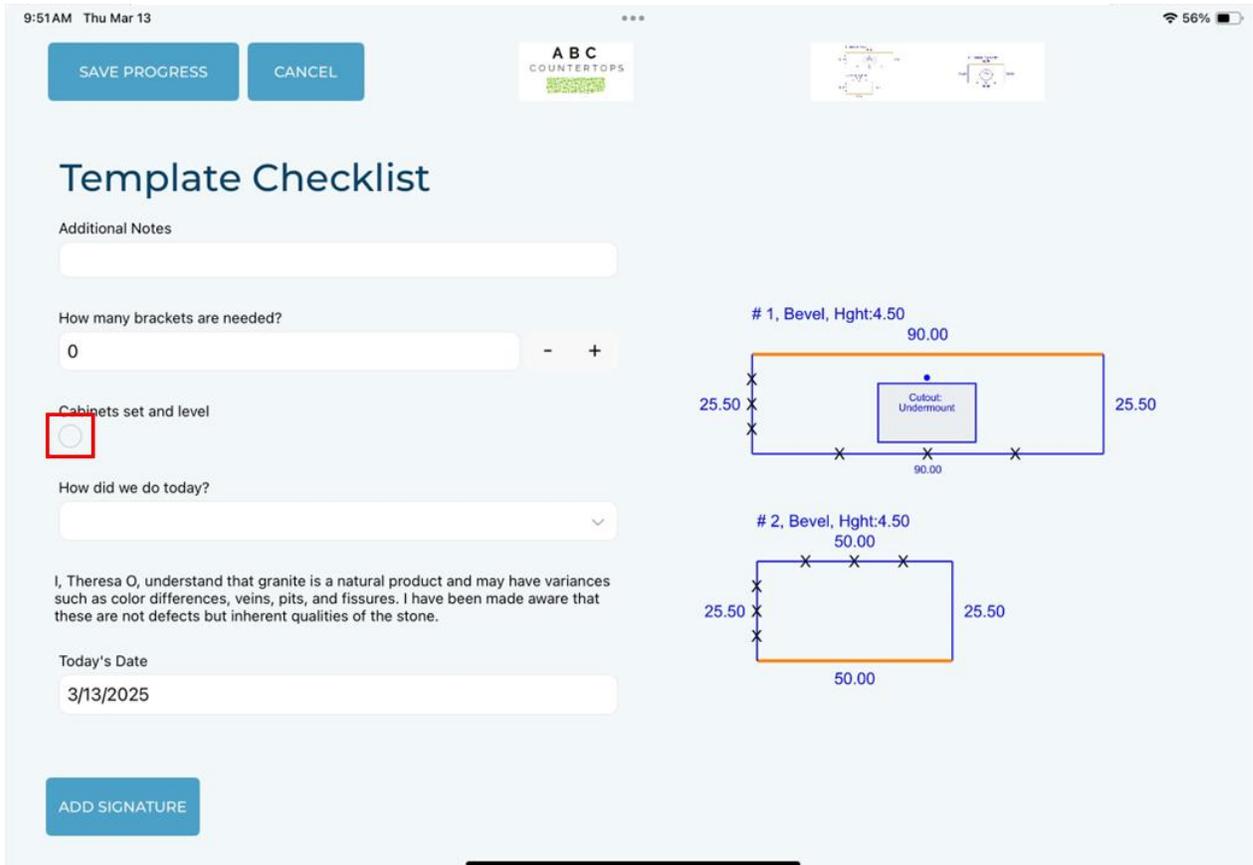
1. **Text:** Users will see a text box to input information.



- 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.

9:51AM Thu Mar 13 56%

SAVE PROGRESS CANCEL ABC COUNTERTOPS

## Template Checklist

Additional Notes

How many brackets are needed?  - +

Cabinets set and level

How did we do today?

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

ADD SIGNATURE

# 1, Bevel, Hght:4.50

# 2, Bevel, Hght:4.50

- 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.

9:51 AM Thu Mar 13 56%

**A B C**  
COUNTERTOPS

## Template Checklist

Additional Notes

How many brackets are needed?

0 - +

Cabinets set and level

How did we do today?

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

3/13/2025

# 1, Bevel, Hght:4.50

# 2, Bevel, Hght:4.50

### 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

SAVE PROGRESS CANCEL

ABC COUNTERTOPS

## Template Checklist

Customer Name  
Theresa O

Job Name  
Pool House

Address  
12247 Manchester ct

City State Zip  
St. Louis MO 63131

Email  
theresa@gmail.com

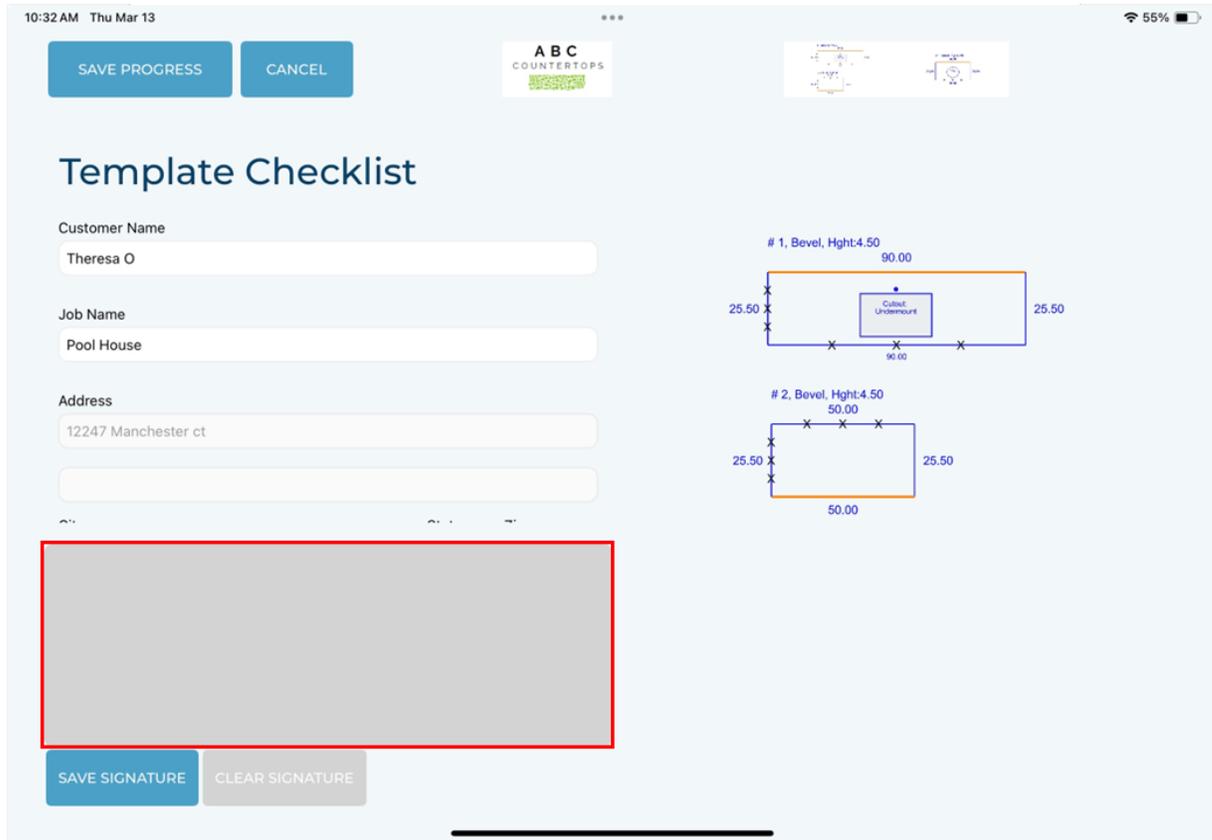
Phone

**ADD SIGNATURE**

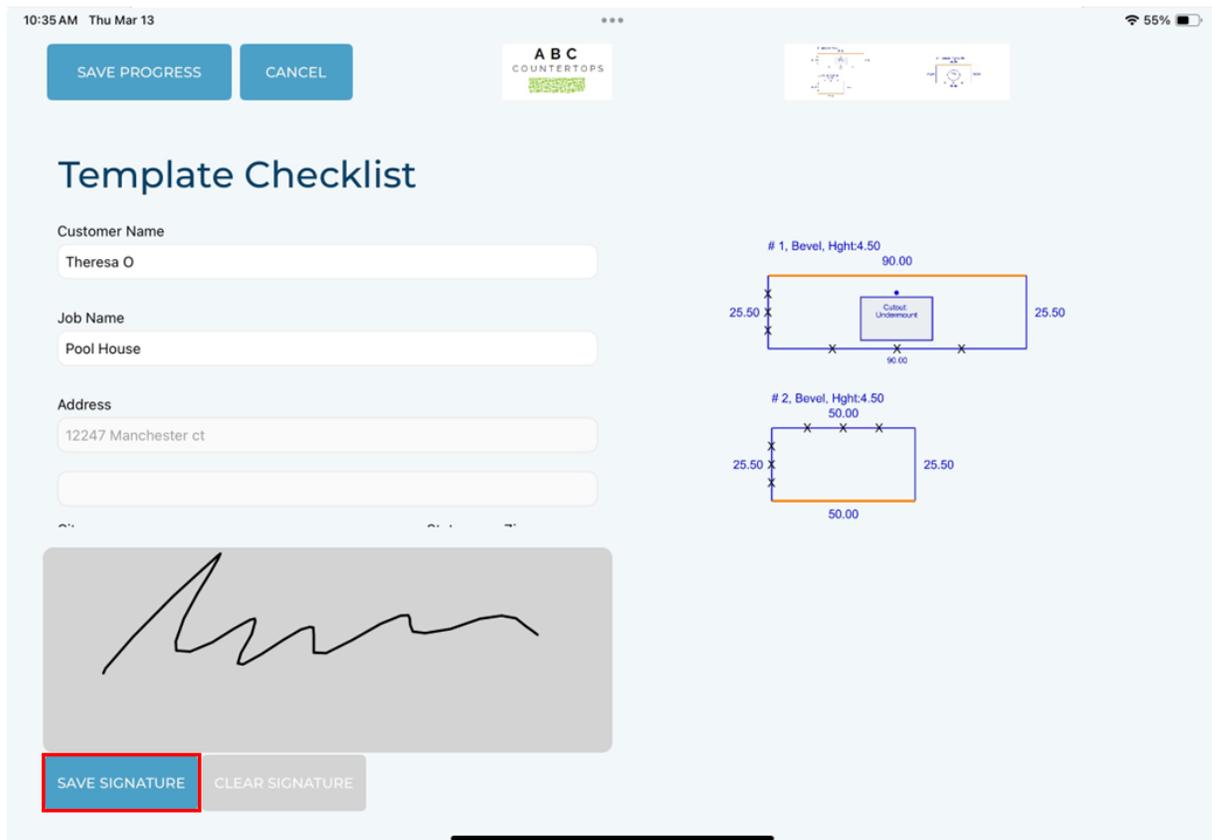
# 1, Bevel, Hght:4.50  
90.00  
25.50  
Cutout: Undermount  
90.00  
25.50

# 2, Bevel, Hght:4.50  
50.00  
25.50  
50.00  
25.50

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.](#)

10:39AM Thu Mar 13

SAVE AND COMPLETE CANCEL

ABC COUNTERTOPS

### Template Checklist

Customer Name  
Theresa O

Job Name  
Pool House

Address  
12247 Manchester ct

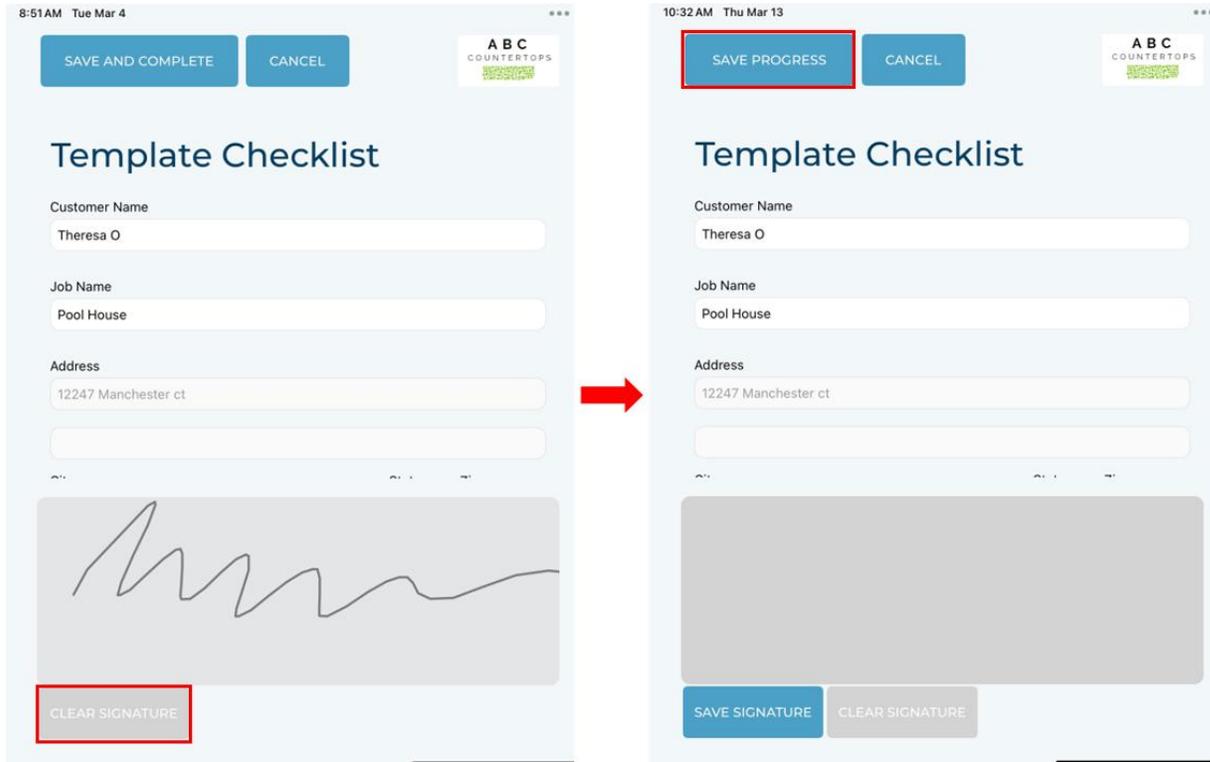
*[Handwritten Signature]*

CLEAR SIGNATURE

# 1, Bevel, Hght:4.50  
90.00  
25.50  
Cutout Undermount  
90.00

# 2, Bevel, Hght:4.50  
50.00  
25.50  
50.00

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**.

The screenshot shows a mobile application interface for 'ABC COUNTERTOPS'. At the top, there are two buttons: 'SAVE PROGRESS' (highlighted with a red box) and 'CANCEL' (with a red arrow pointing to it and the text 'Will save form's progress'). Below the buttons is the 'Area Checklist' form with the following fields:

- Customer Name: Theresa O
- Job Name: Pool House
- Area Name: Kitchen
- Address: 12247 Manchester ct
- City: St. Louis, State: MO, Zip: 63131
- Fmail: (empty)

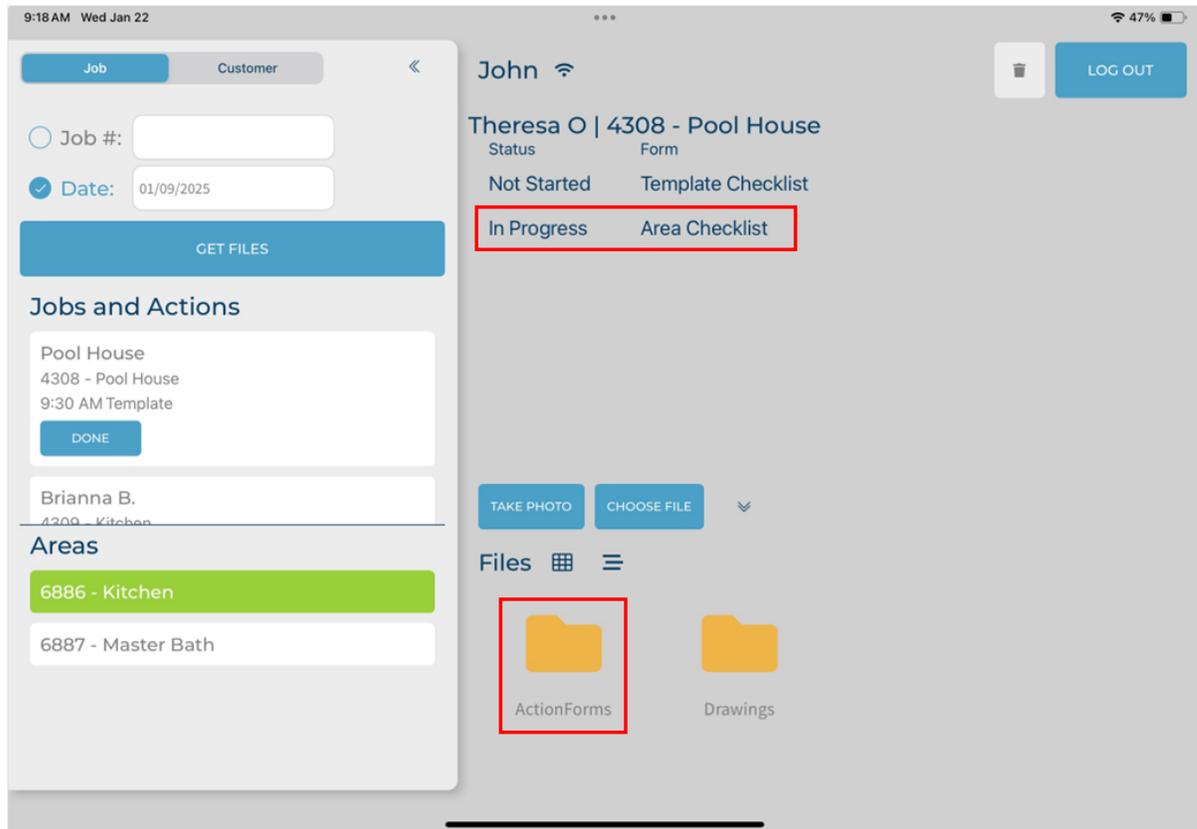
At the bottom of the form, there is a 'SAVE AND COMPLETE' button (highlighted with a red box) with a red arrow pointing to it and the text 'Will save and mark form as complete.' To the right of the form are two diagrams of countertop layouts:

- # 1, Bevel, Hght:4.50: A rectangular layout with dimensions 90.00 (width) and 25.50 (height). It features a central 'Cutout: Undermount' and 'X' marks on the top and bottom edges.
- # 2, Bevel, Hght:4.50: A rectangular layout with dimensions 50.00 (width) and 25.50 (height). It features 'X' marks on the top and bottom edges.

## Viewing Saved PDFs within the Tablet App

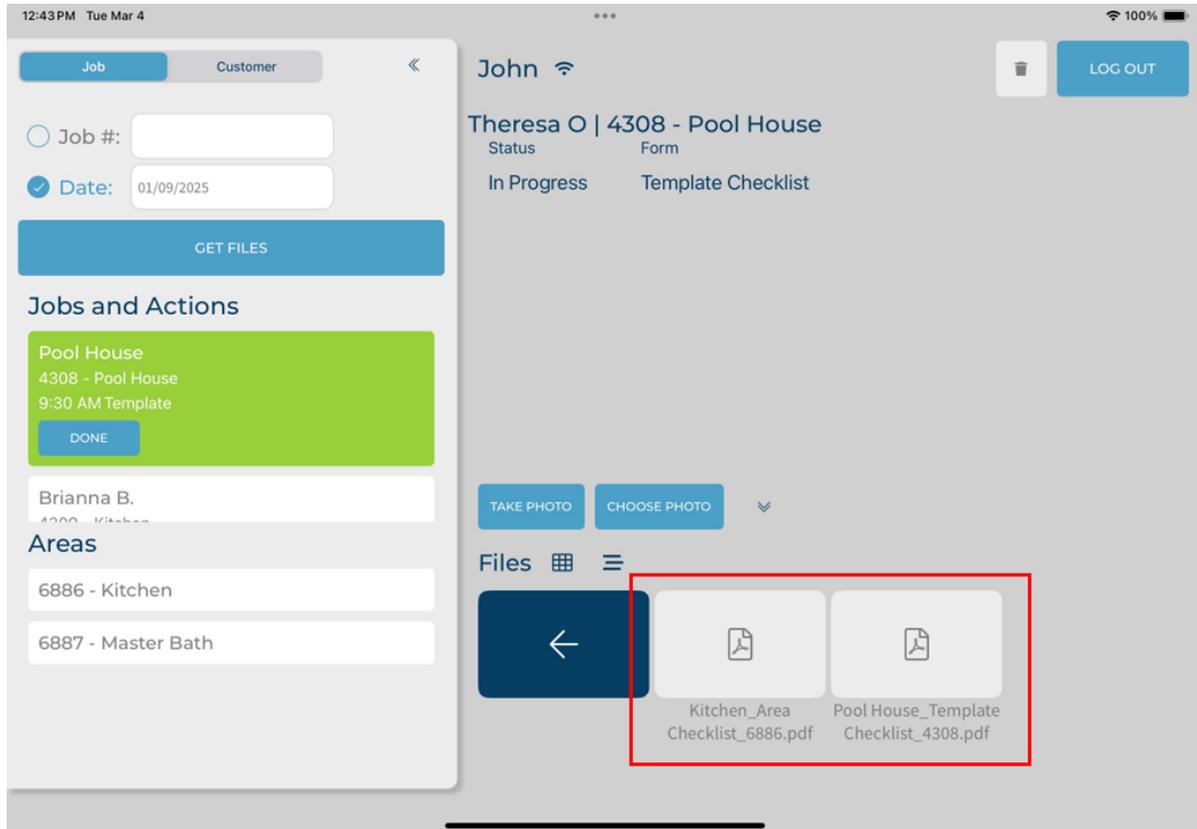
All saved forms, whether **In Progress**, **Completed** or **Uploaded**, will be stored in the **ActionForms** folder on your tablet. Only **Uploaded** forms will appear in the **ActionFlow Job Files**.

**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.

**A B C**  
COUNTERTOPS

A graphic consisting of a grid of small green squares of varying shades, arranged in a roughly rectangular shape.

## Area Checklist

**Customer Name:**  
Theresa O

**Job Name:**  
Pool House

**Area Name:**  
Kitchen

**Address:**  
12247 Manchester ct

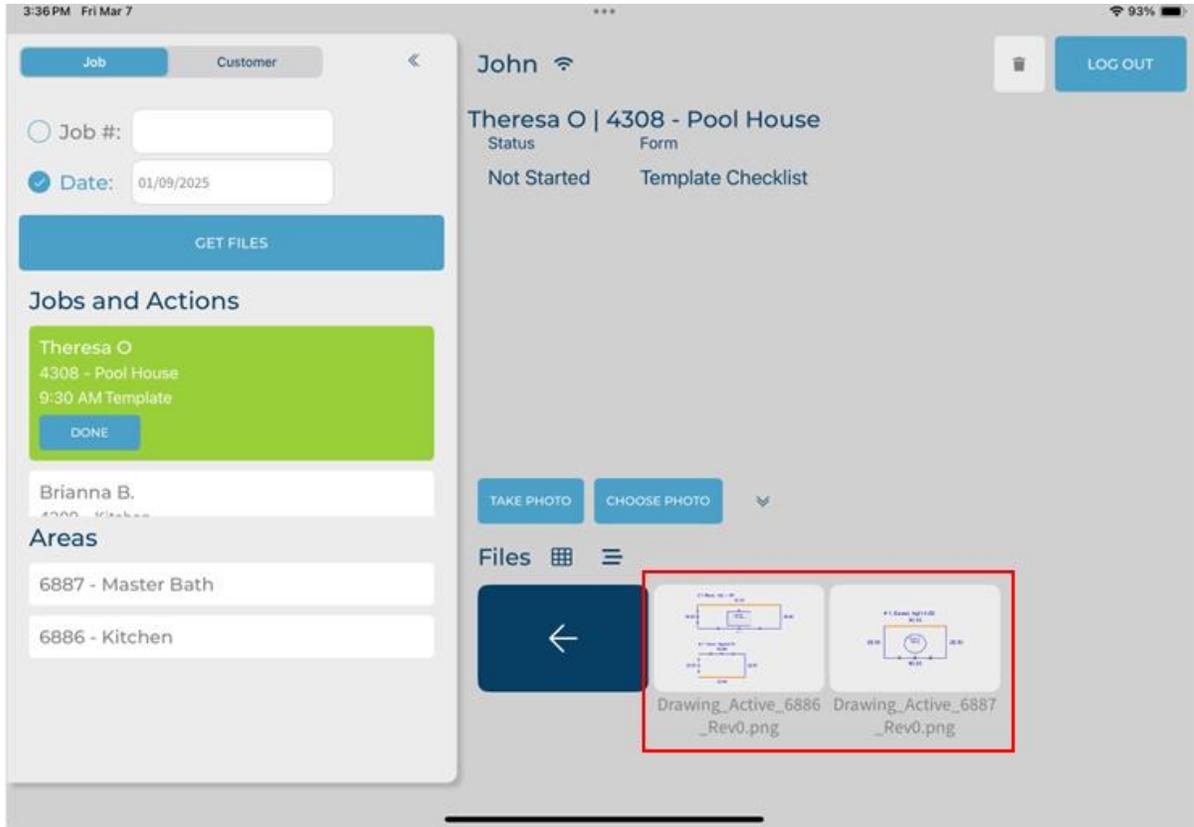
St. Louis MO, 63131

**Email:**  
theresa@gmail.com

**Phone:**  
3145558527

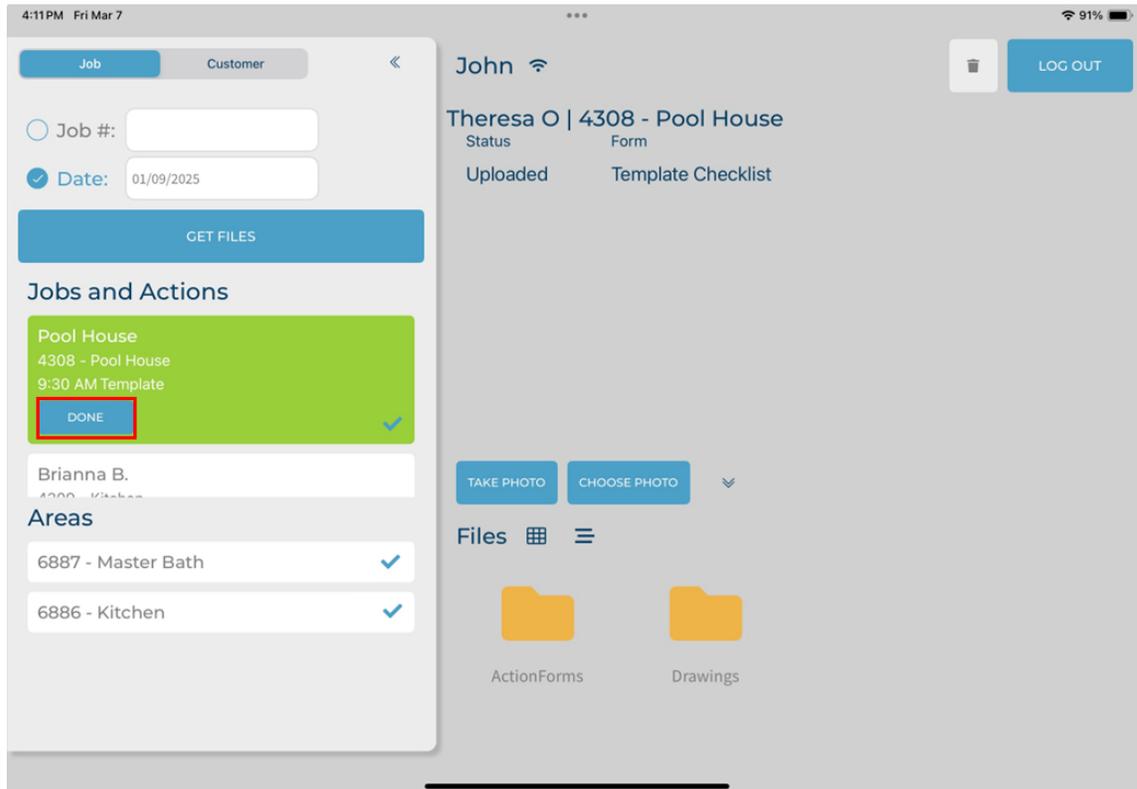
**Account:**

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

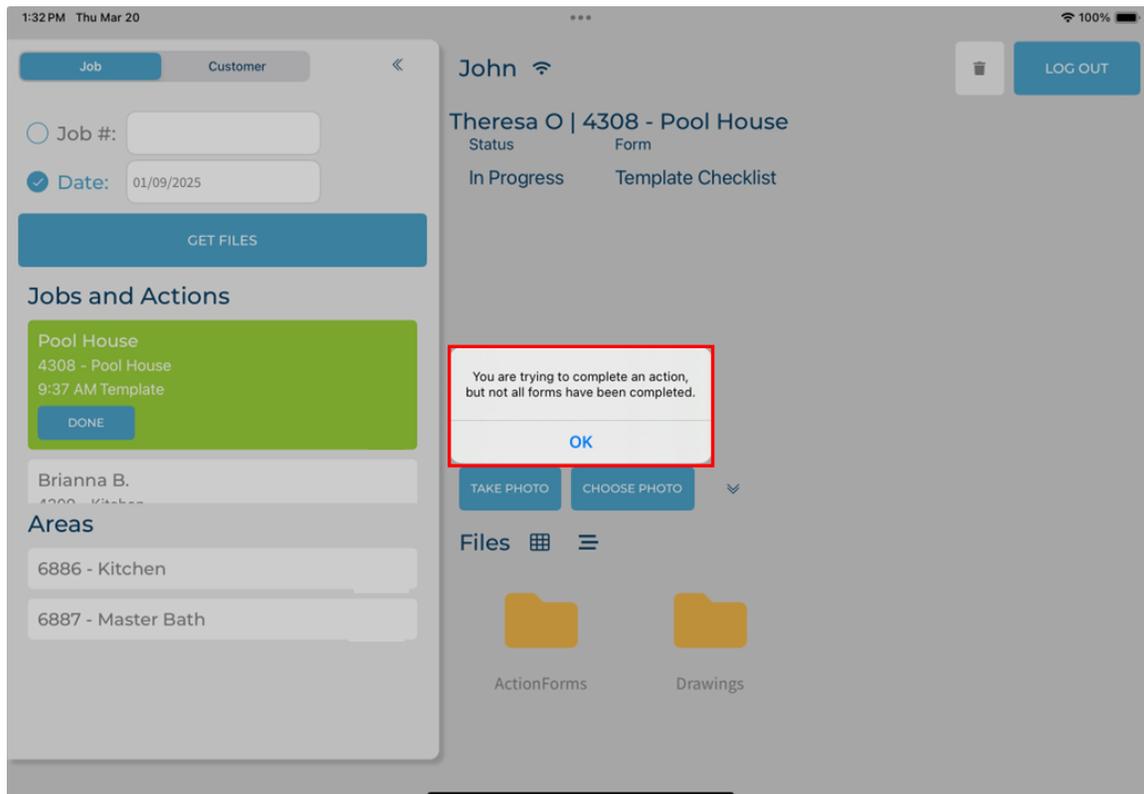


### Completing the Assigned Action

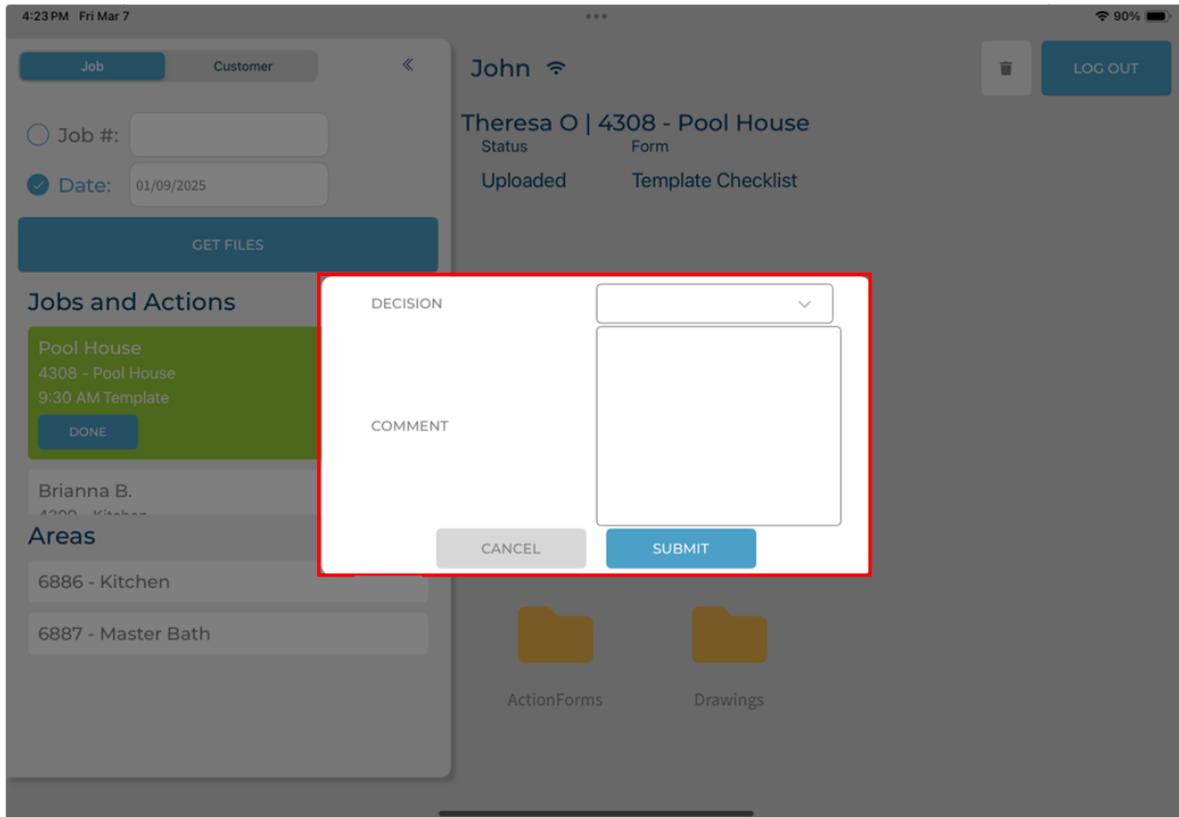
Upon completing the form(s), users can complete the **Assigned Action** in **ActionFlow** by clicking the blue "Done" button on the respective job.



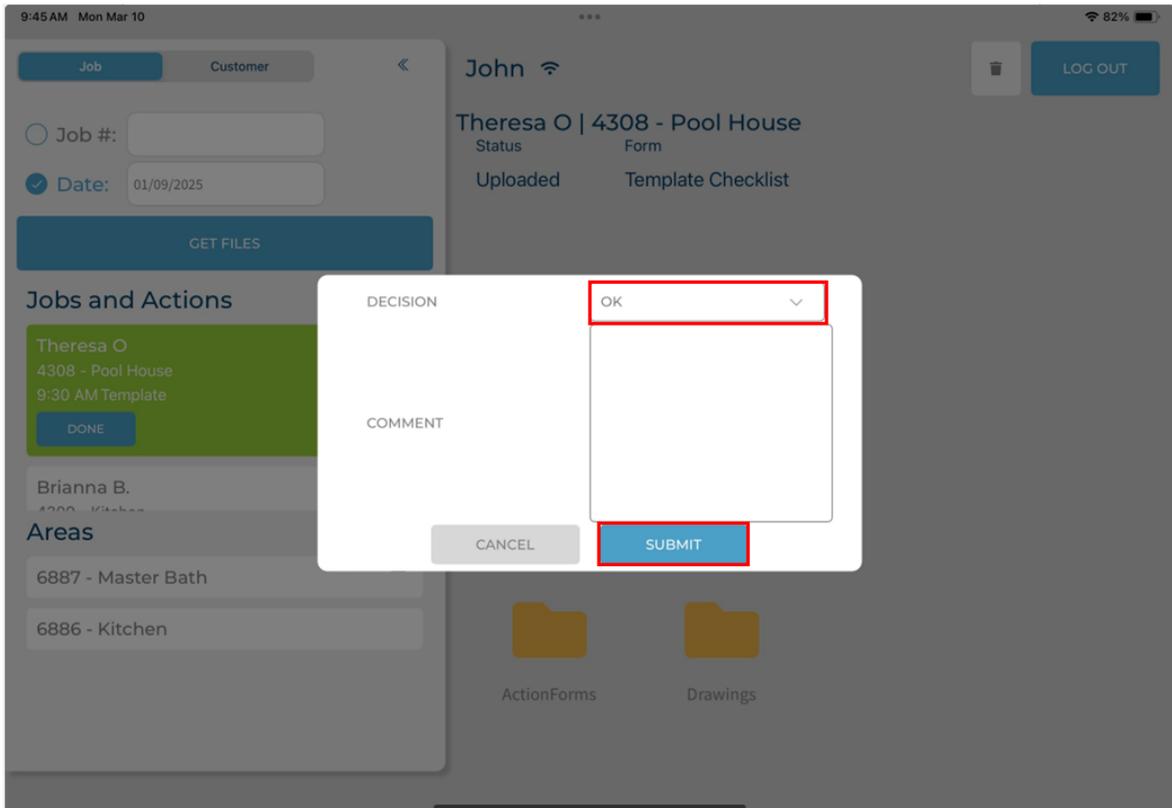
**Note:** Users will encounter an error message if there are any forms left incomplete.



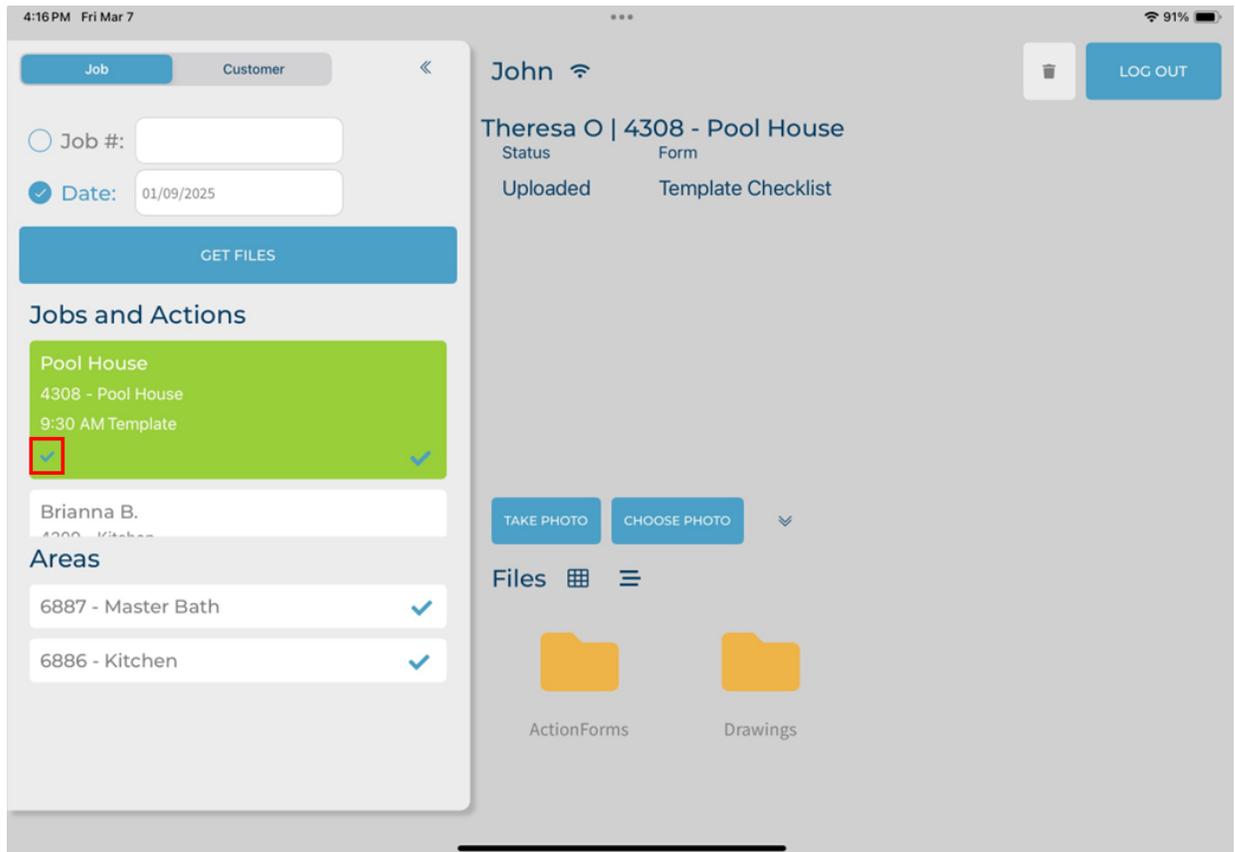
Clicking "Done" will prompt a dialog box to appear, allowing users to select a **Decision** for the **Action** and add any necessary notes on the Action line in the **Comment** area, if desired.



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**.

The screenshot shows the ActionFlow Desktop App interface. The top navigation bar includes 'Home', 'Processes', 'Administration', and 'Implementation'. The main content area is titled 'Customer: #170021 Sally O'Malley'. On the right, a sidebar titled 'Customer Files' is open, showing a list of folders. The 'ActionForms' folder is highlighted with a red box. The main form area displays 'Customer Basic Info' with fields for Name, Status, Type, and Lead Source, along with sections for Contact Information, Persons, and Assigned Roles.

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.

The screenshot shows the ActionFlow Desktop App interface for a job. The top navigation bar includes 'Home', 'Processes', 'Administration', and 'Implementation'. The main content area is titled 'Job: #4308 Pool House'. On the right, a sidebar titled 'Job Files' is open, showing a list of folders. The 'ActionForms' folder is highlighted with a red box. The main form area displays 'Job Basic Info' with fields for Name, Status, Type, and Contact, along with an 'Area List' table and a table for actions.

Area#	Name	Qty	Status
6886	Kitchen	1	Ter
6887	Master Bath	1	Ter

## 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.

The screenshot shows the ActionFlow interface for a job named "Pool House". The "Assigned Roles" section is highlighted with a red box, showing "Project Manager" assigned to "Kim". The "Actions Grid" below shows a row for "Template Form Received" with a decision of "na", user "Kim", and start time "Mon 3/10/25 11:11 A".

Area#	Rv	Name	Qnt	Status	Price List	Material	Color
1	0	Kitchen	1	Templated	Retail	Granite 3CM	Abi
	0	Master Bath	1	Templated	Retail	Cambria 3CM	Blax

Action	Decision	Comment	User	Start	Urgnt	Completed	Status	Hrs	Sch	Link	LastEditBy	LastEditDate	Chk
Done	Template		John	Thu 1/9/25 9:30 A				0.76			Theresaabc	3/7/2025 4:17:18 PM	
Done	Template Form Received	na	Kim	Mon 3/10/25 11:11 A				1.00			John	3/10/2025 11:11:56 AM	

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."

The screenshot shows the ActionFlow interface for a job named "Pool House". The "Assigned Roles" section is highlighted with a red box, showing "Project Manager" assigned to "Kim". The "Actions Grid" below shows a row for "Comment" with a decision of "na", user "Kim", and comment "A form has been received".

Area#	Rv	Name	Qnt	Status	Price List	Material	Color
1	0	Kitchen	1	Templated	Retail	Granite 3CM	Abi
	0	Master Bath	1	Templated	Retail	Cambria 3CM	Blax

Action	Decision	Comment	User	Start	Urgnt	Completed	Status	Hrs	Sch	Link	LastEditBy	LastEditDate	Chk
Done	Template		John	Thu 1/9/25 9:30 A				0.76			Theresaabc	3/7/2025 4:17:18 PM	
Done	Comment	A form has been received	Kim	Mon 3/10/25 1:41 P				1.00			theresaabc	3/10/2025 1:44:41 PM	

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.

The screenshot shows the ActionFlow interface for a job named "Pool House". The "Job Basic Info" section shows the job name, status (Templated), and assigned roles (Project Manager: Kim). The "Area List" table shows two areas: Kitchen (Area# 6886) and Master Bath (Area# 6887). The "Actions" table shows a "Comment" action performed by John on 3/10/25 at 1:49 P, with the comment "A form has been received".

Area#	Name	Qnt	Status	Price List	Material	Color
6886	Kitchen	1	Templated	Retail	Granite 3CM	Abs
6887	Master Bath	1	Templated	Retail	Cambria 3CM	Bla

Action	Decision	Comment	User	Start	Urgnt	Completed	Status	Hrs	Sch	Link	LastEditBy	LastEditDate	Chk	Intr
Done	Template		John	Thu 1/9/25 9:30 A				0.76			Theresaabc	3/7/2025 4:17:18 PM		
Done	Comment	A form has been received	John	Mon 3/10/25 1:49 P				1.00			theresaabc	3/10/2025 1:49:27 PM		

## Viewing Completed Forms in ActionFlow

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

The screenshot shows the ActionFlow interface for the same job. The "Job Files" folder is expanded, showing a folder named "Job/4308/ActionForms/". Inside this folder, two PDF files are listed: "Kitchen\_Area Checklist\_6886.pdf" and "Pool House\_Template Checklist\_4308.pdf".

Name
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**  
COUNTERTOPS



## 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.

# ABC

## COUNTERTOPS

### 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:**

**Material:**  
Granite 3CM

**Color:**  
Absolute Black 3CM

**Edge:**  
Bevel

**Sink Model:**  
Kohler 3322

Description: Includes template and I

Fab Notes: I

▼ Drawing Options

▼ Alternative Options

^ Details

Customer Provided Sink:

MatCostTest:

Backsplash:

Cabinets:

Cooktop Model:

Cooking Unit:

Faucet Model:

**Sink Model: Kohler 3322**

Sink Location:

Demo/Tear Out Needed:

**Line Items:**  
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