



Help Documentation

iPhone Version

V1.7.6

Copyright

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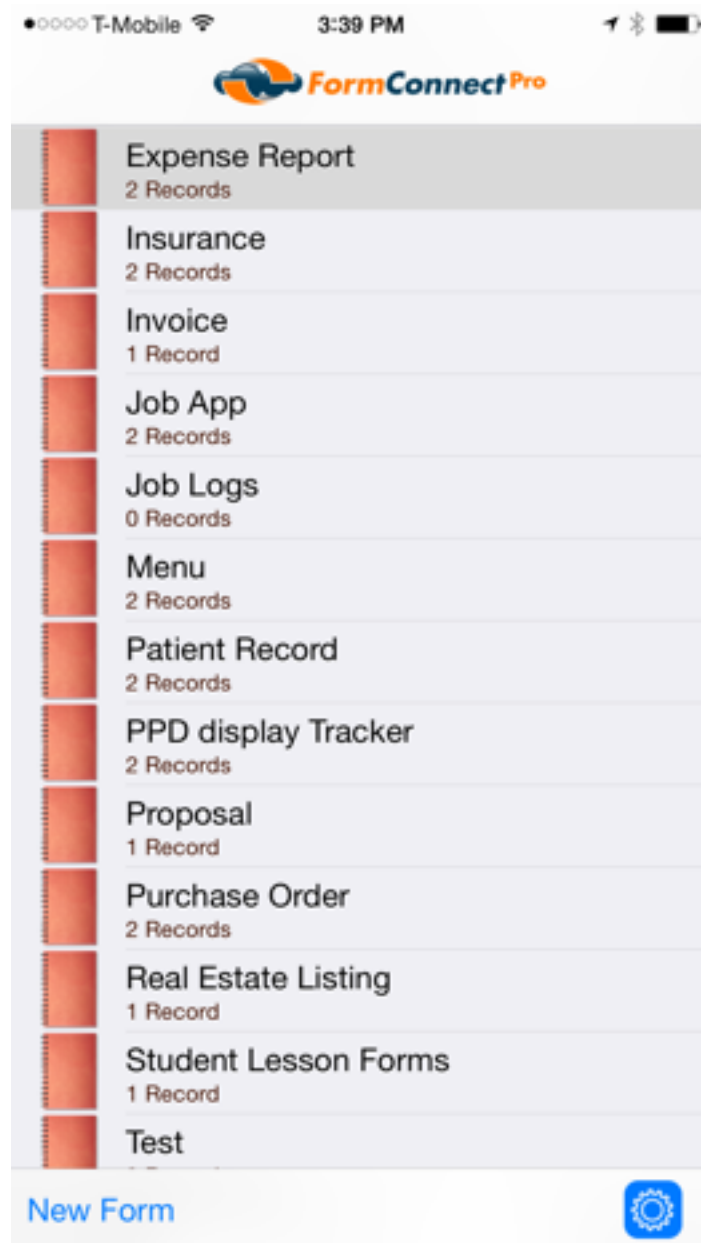
# FormConnect Help

## 1. Overview

- FormConnect is an easy to use app for creating business forms on your iPhone. Its simple design allows you to customize the forms the way you want them to look.

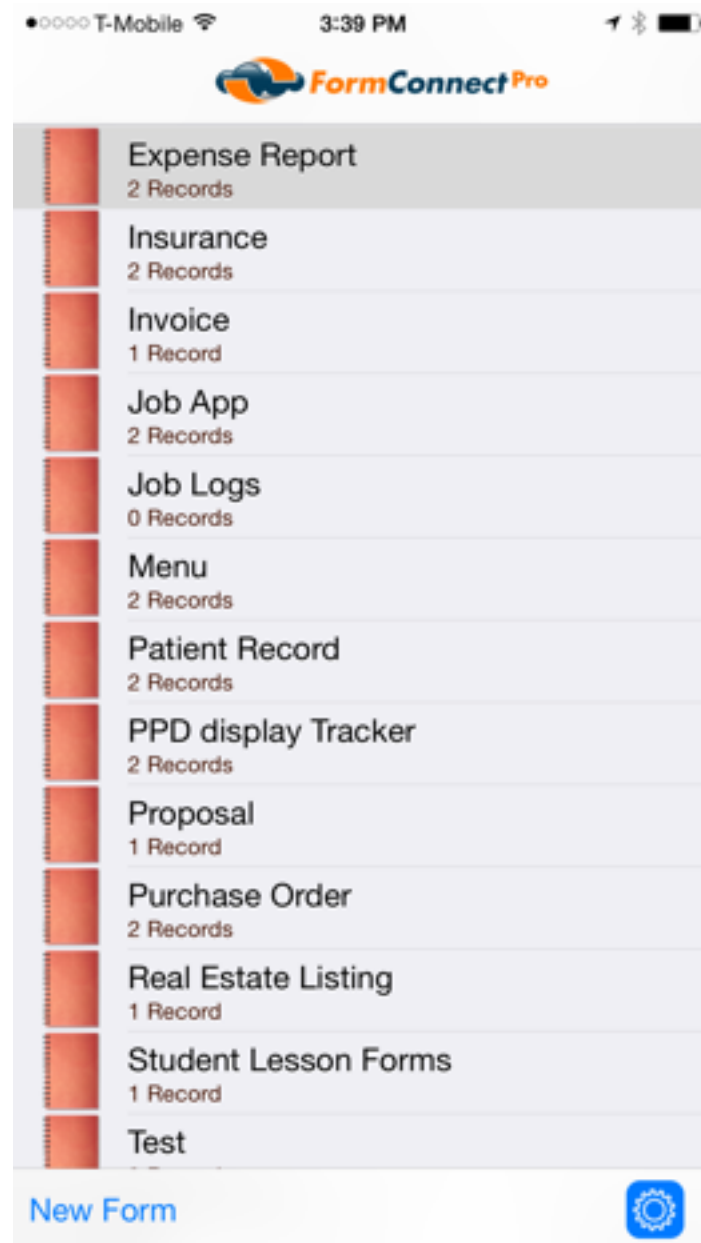
## 2. Viewing Forms

- The main screen displays your forms. You can navigate through them by swiping up and down. Tap on a form to open it.

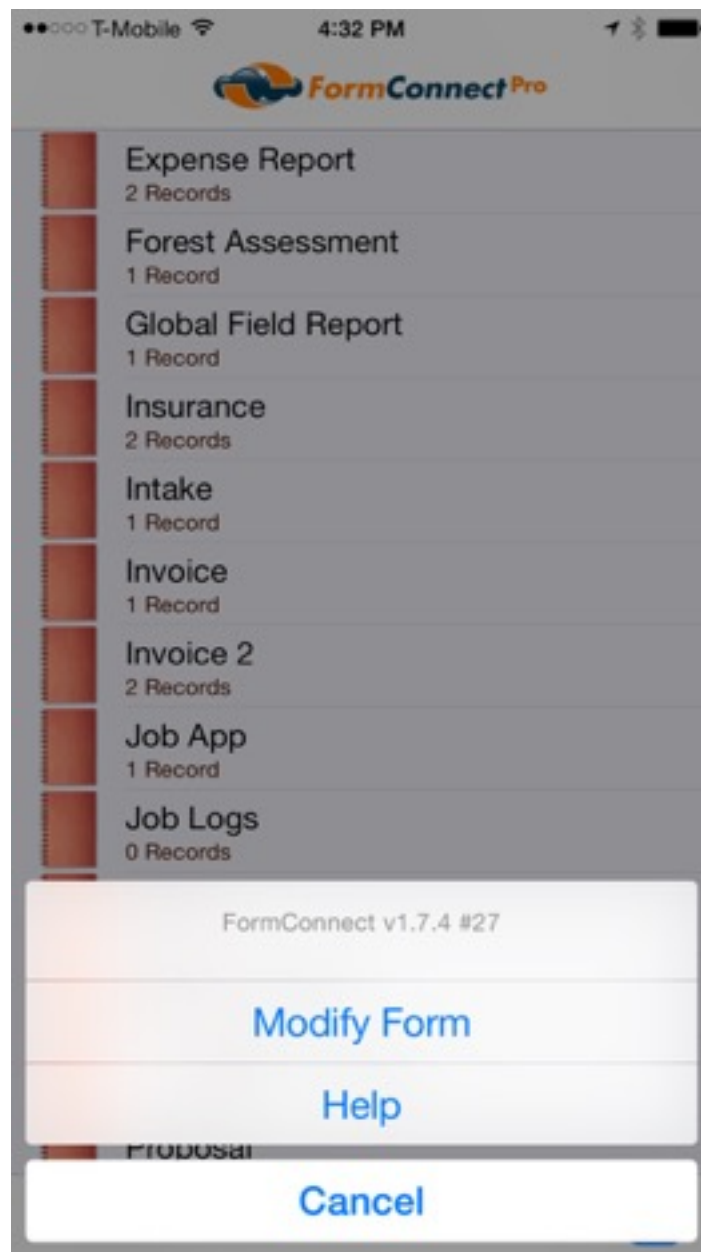


### 3. Modify an Existing Form

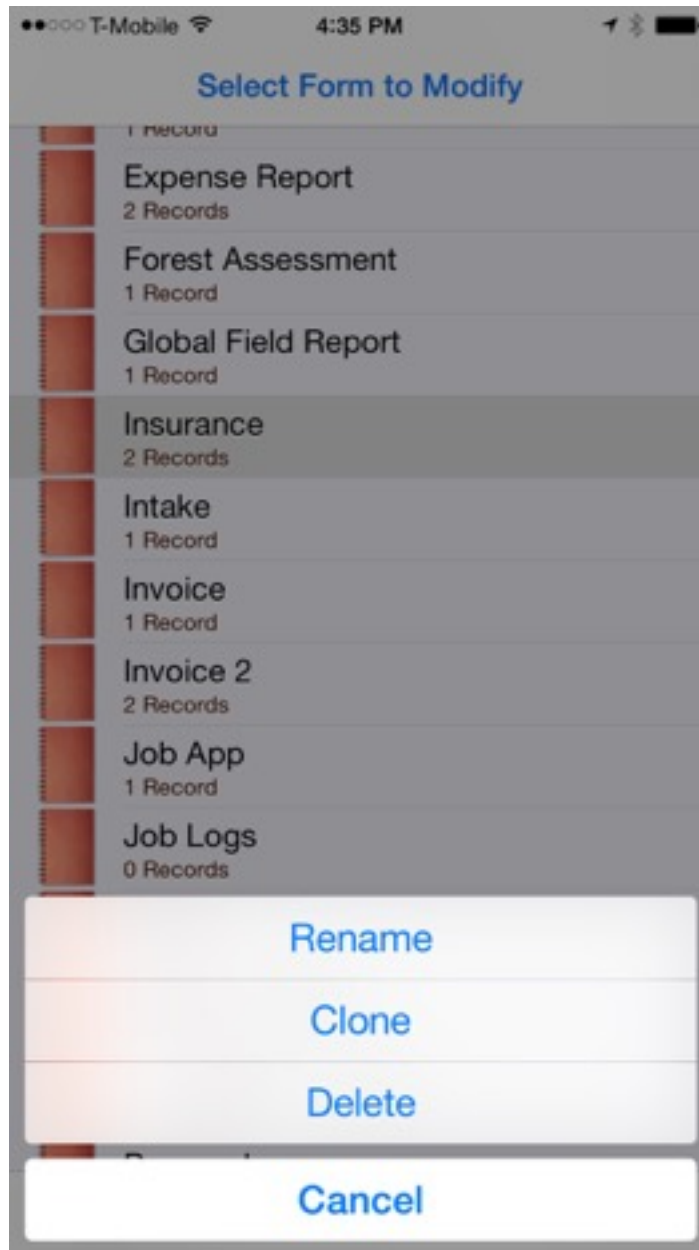
- Tap on the “Gear” icon in the lower right corner of the main screen.



- A pop-up window will display overlaying the forms.
- Tap “[Modify Form](#)”.

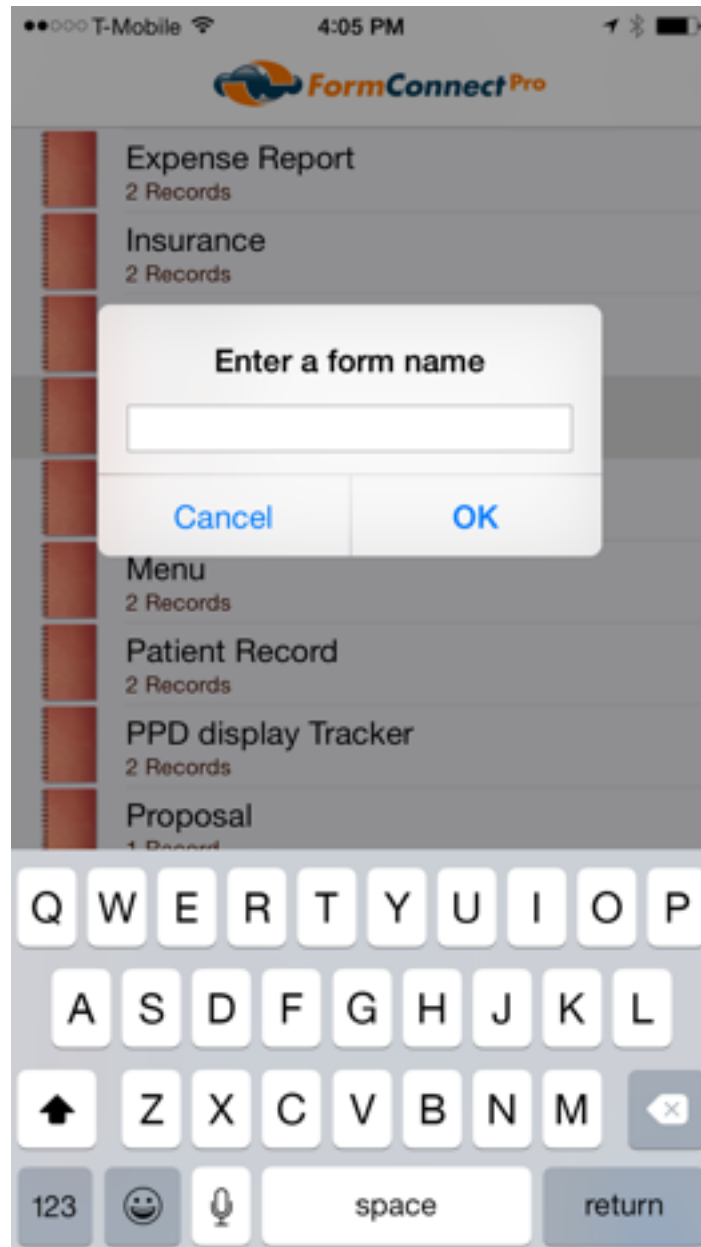


- Select the form you wish to modify and select [Rename](#), [Clone](#) or [Delete](#).

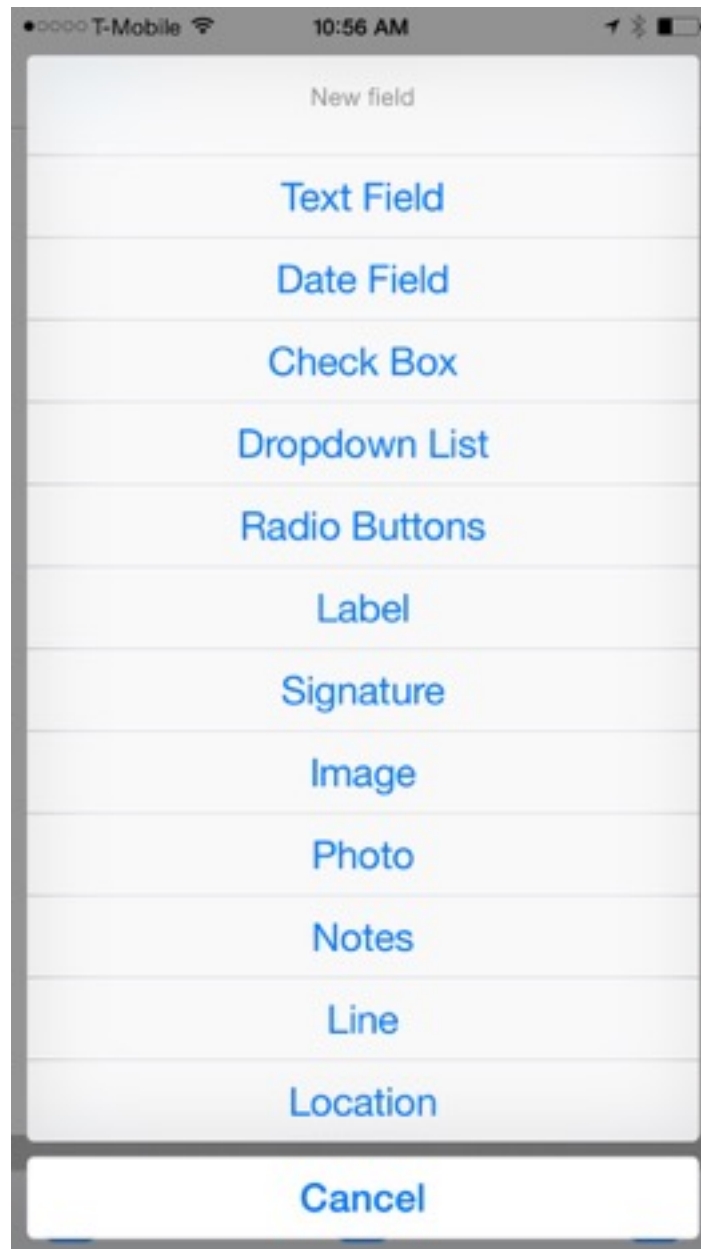


#### 4. Create a New Form

- Tap on the [New Form](#) button to create one. You will then be prompted to enter a form name.

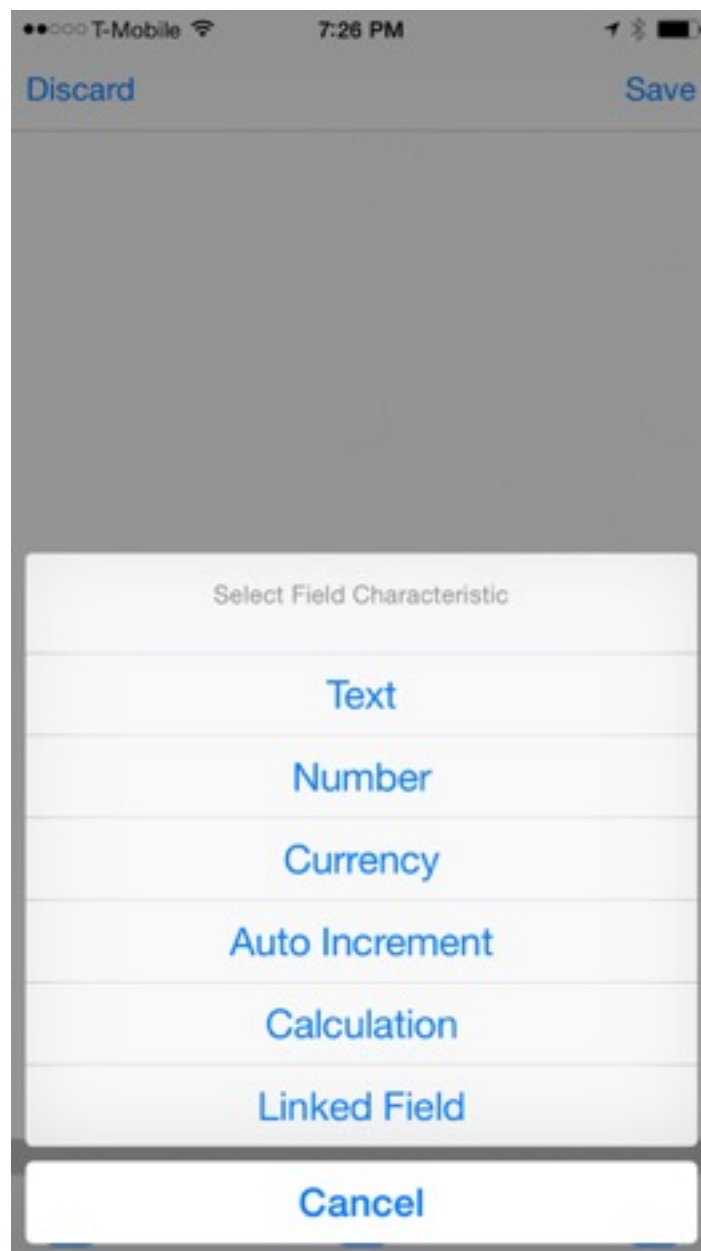


- A “New field” pop-up screen will display.
- Select the field type (Text, Date, Check Box, etc.).



Note: Some field types (GPS Location) are only available with the FormConnect Pro version.

- Select the Field Characteristic (Text, Number, Currency, etc.).



Note: Some field characteristics are only available with the FormConnect Pro app (Calculation, Linked Field).

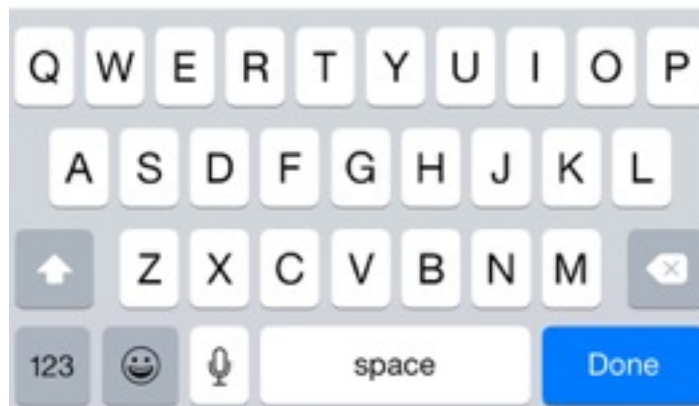


- Enter the Field Name and configure the other field settings (font size, alignment, etc.).
- Tap on the “Done” button when finished.

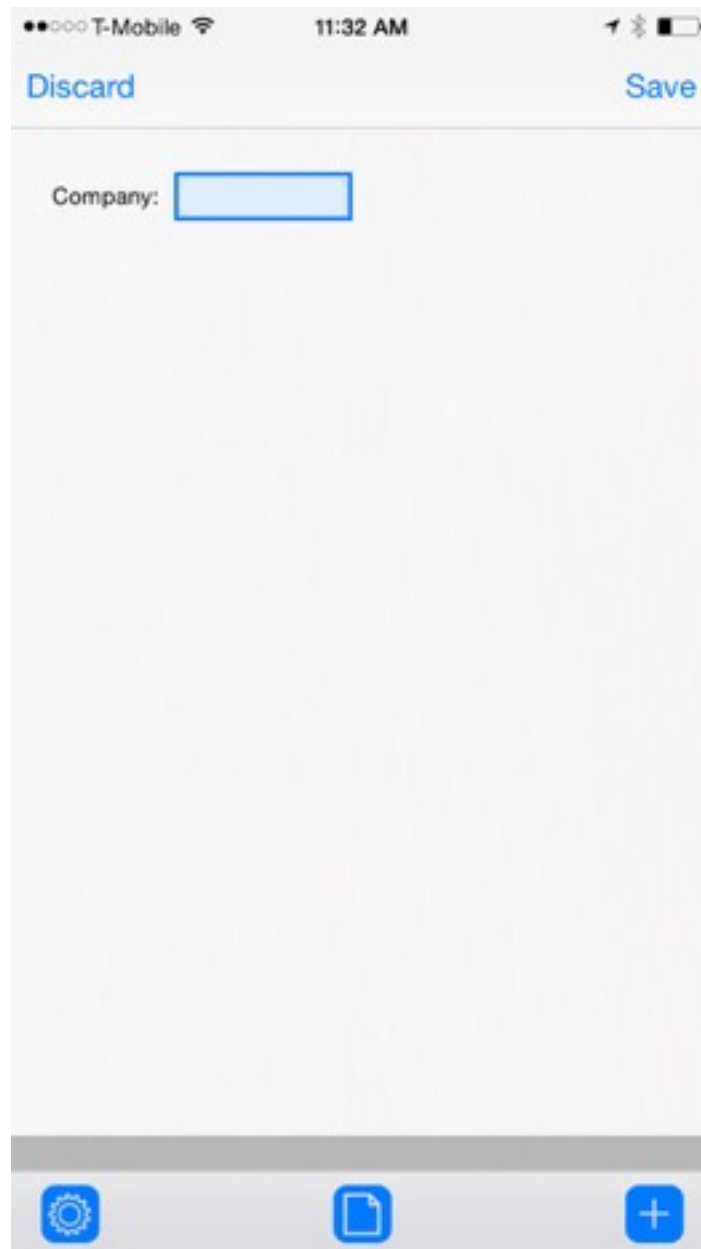


The screenshot shows a mobile application interface for configuring a field. At the top, the status bar displays 'T-Mobile', '11:27 AM', and battery level. The main content area includes:

- Field name:** A text input field containing 'Company' with a close button (X) on the right.
- Font Size:** A slider control set to '14.5 pt'.
- Alignment:** Three buttons: 'Left' (highlighted in blue), 'Center', and 'Right'.
- Display label:** A checked checkbox.
- Required field:** An unchecked checkbox.
- Text:** A label for the 'Required field' checkbox.
- Copy field when cloning record:** An unchecked checkbox.




- The new field will display on the screen.
- To move the field, place your finger on the blue box and drag it to the location you desire.



## 5. Edit/Add a Field

- Tap on the “[Paint brush](#)” icon to open the editor.

The screenshot displays a mobile application interface for editing or adding a record. At the top, the status bar shows 'T-Mobile', '4:37 PM', and a battery icon. Below the status bar, there is a blue header with a back arrow and the text 'Records', and a blue paintbrush icon in the top right corner. The main content area contains a form with the following fields:

- First Name:
- Last Name:
- Photo: 
- Company:
- Title:
- Business Address:
- City:
- State:
- Zip:
- Daytime Phone:
- Fax:
- Mobile Phone:
- Home Phone:
- Home Address:
- City:
- State:
- Zip:
- Email Address:
- Web Address:
- Notes:

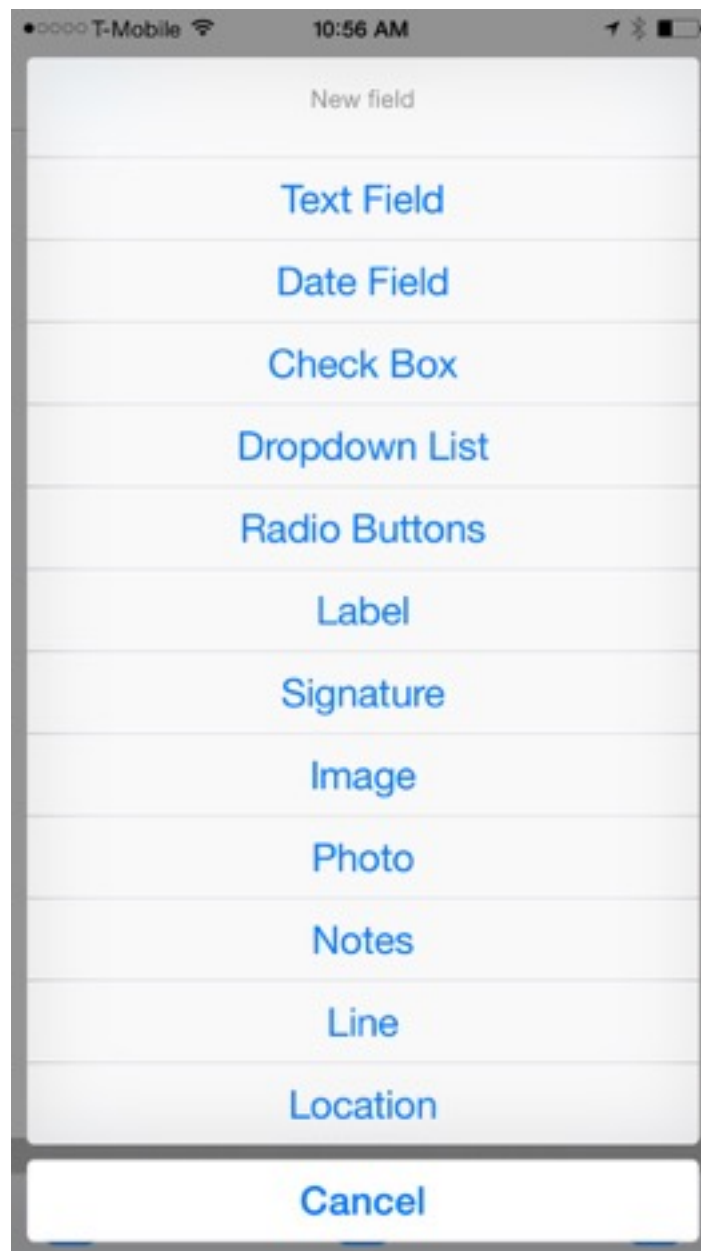
At the bottom of the screen, there is a navigation bar with four blue icons: a share icon, a lock icon, a document icon, and a plus sign icon.

- Tap on the field you wish to edit and the [Edit Select Copy Delete](#) menu bar displays.
- Touch the [Edit](#) option to configure the field settings or tap on the (+) icon to add a new field.

The image shows a mobile contact form interface. At the top, there is a status bar with "T-Mobile", signal strength, Wi-Fi, time "7:32 PM", and battery level. Below the status bar are two buttons: "Discard" on the left and "Save" on the right. A dark grey menu bar is positioned above the form fields, containing four options: "Edit", "Select", "Copy", and "Delete". The "Edit" option is currently selected, indicated by a white arrow pointing down to the "First Name" field. The form fields include: "First Name:" and "Last Name:" text boxes; "Photo:" with a camera icon; "Company:" and "Title:" text boxes; "Business Address:" text box; "City:", "State:", and "Zip:" text boxes; "Daytime Phone:" and "Fax Number:" text boxes; "Mobile Phone:" and "Home Phone:" text boxes; "Home Address:" text box; "City:", "State:", and "Zip:" text boxes; "Email Address:" text box; "Web Address:" text box; and "Notes:" with a large text area. At the bottom of the screen, there is a navigation bar with three icons: a gear (Settings), a document (Form), and a plus sign (+) (Add).

## 6. Field Types

- There are 10 different field types to choose from when creating a form.
- There are no limitations on how many fields you can create or how many pages the form can contain.



## 7. Add/Remove Pages


- Tap on the page icon  to add or remove a page.



••••• T-Mobile 12:43 PM

Discard Save

First Name:  Last Name:

Photo: 

Company:  Title:

Business Address:

City:  State:  Zip:

Daytime Phone:  Fax:

Mobile Phone:  Home Phone:

Home Address:




City:  State:  Zip:

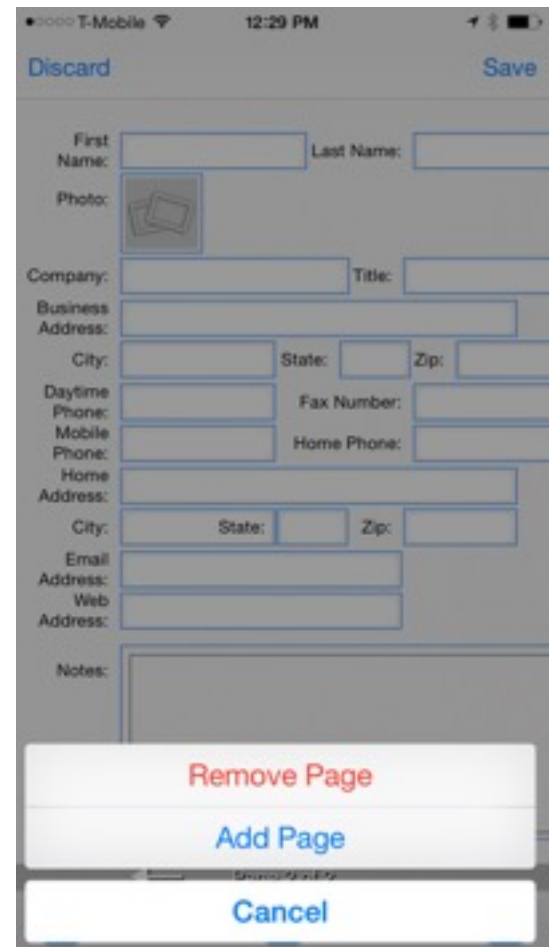
Email Address:

Web Address:

Notes:

Signature:


  



••••• T-Mobile 12:29 PM

Discard Save

First Name:  Last Name:

Photo: 

Company:  Title:

Business Address:

City:  State:  Zip:

Daytime Phone:  Fax Number:

Mobile Phone:  Home Phone:

Home Address:

City:  State:  Zip:

Email Address:

Web Address:

Notes:

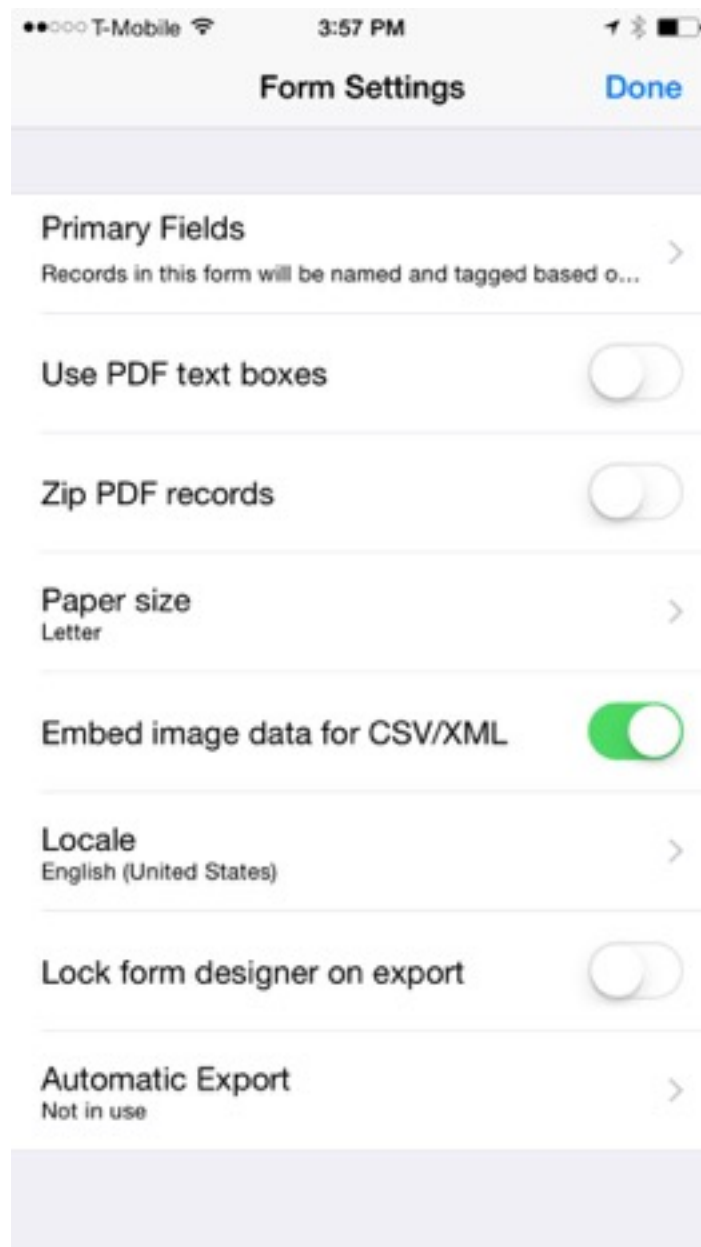
Remove Page

Add Page

Cancel

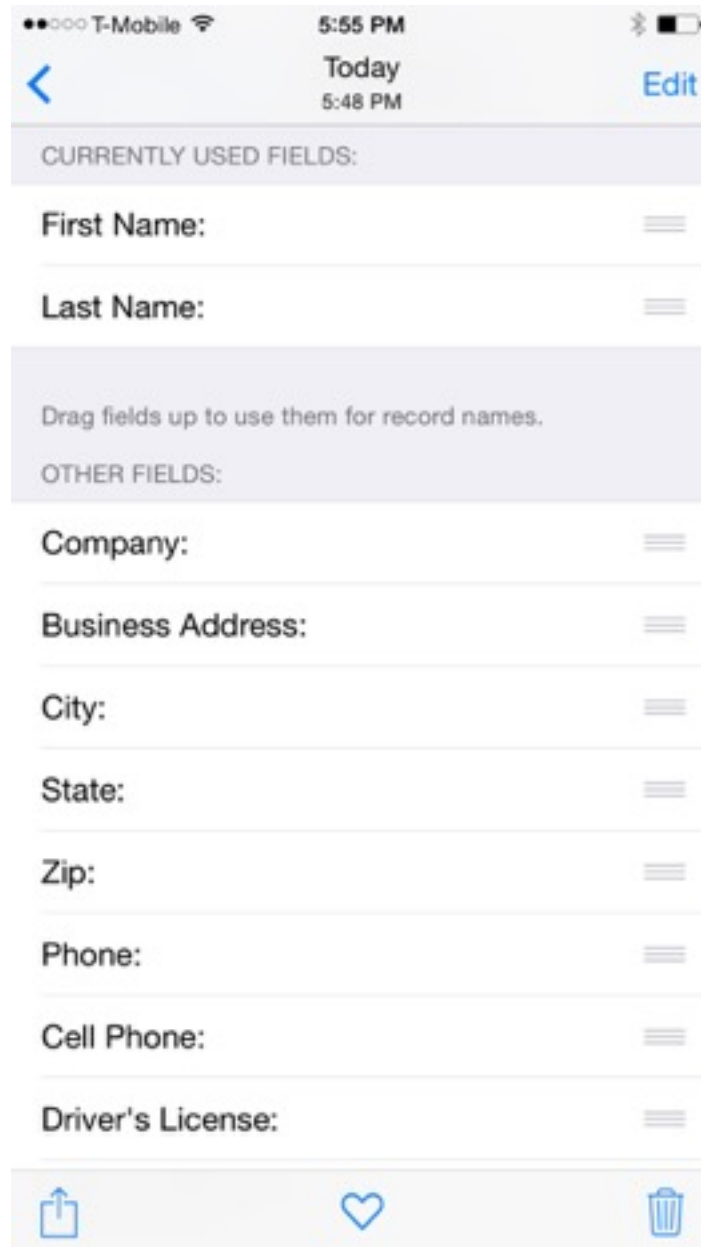
## 8. Form Settings

- To configure the [Form Settings](#), open the form designer (paint brush icon) and tap on the [gear](#) icon.



## 9. Primary Fields

- A form can have up to two primary fields. The purpose of the primary field is to be used for naming a record.



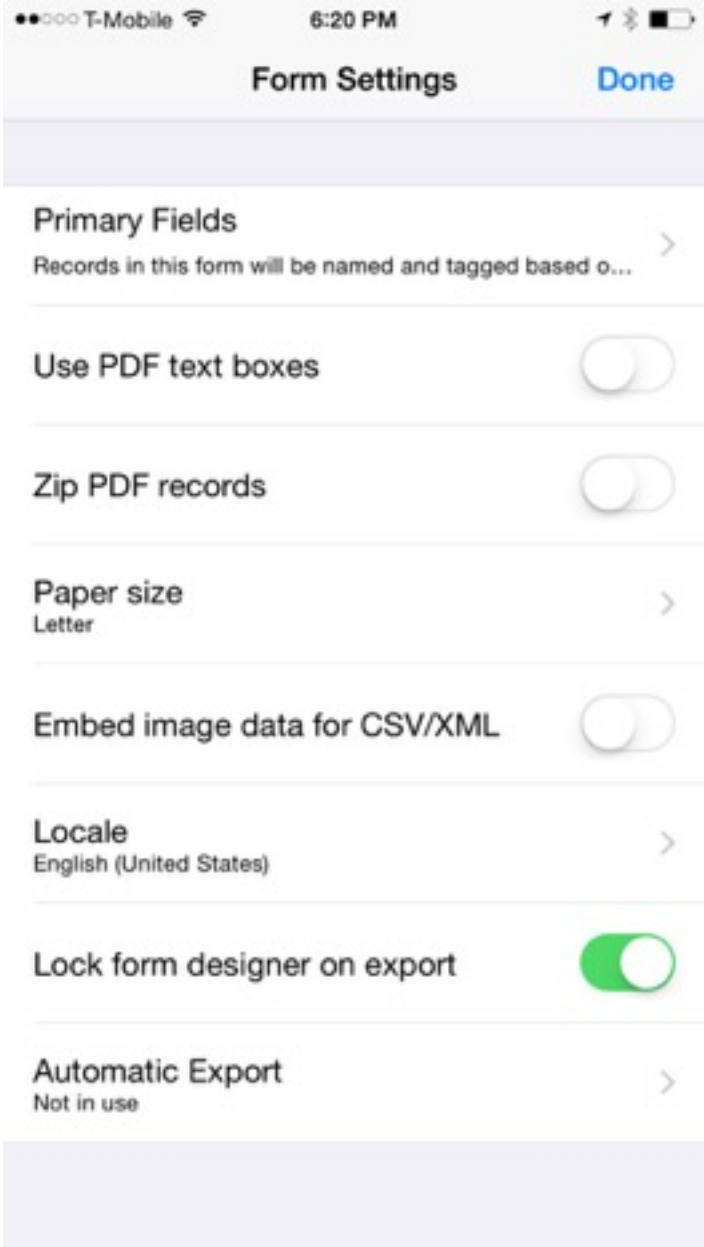
The screenshot shows a mobile application interface for editing a form. At the top, the status bar displays 'T-Mobile', signal strength, Wi-Fi, and battery icons. The time is 5:55 PM. Below the status bar, there is a navigation bar with a back arrow on the left, the text 'Today 5:48 PM' in the center, and an 'Edit' button on the right. The main content area is divided into two sections: 'CURRENTLY USED FIELDS:' and 'OTHER FIELDS:'. The 'CURRENTLY USED FIELDS:' section contains two text input fields: 'First Name:' and 'Last Name:'. The 'OTHER FIELDS:' section contains several text input fields: 'Company:', 'Business Address:', 'City:', 'State:', 'Zip:', 'Phone:', 'Cell Phone:', and 'Driver's License:'. A message 'Drag fields up to use them for record names.' is displayed between the two sections. At the bottom of the screen, there is a navigation bar with three icons: a share icon, a heart icon, and a trash icon.

Note: The first text field created during the design of the form is assigned as the primary field but it can be changed at anytime.



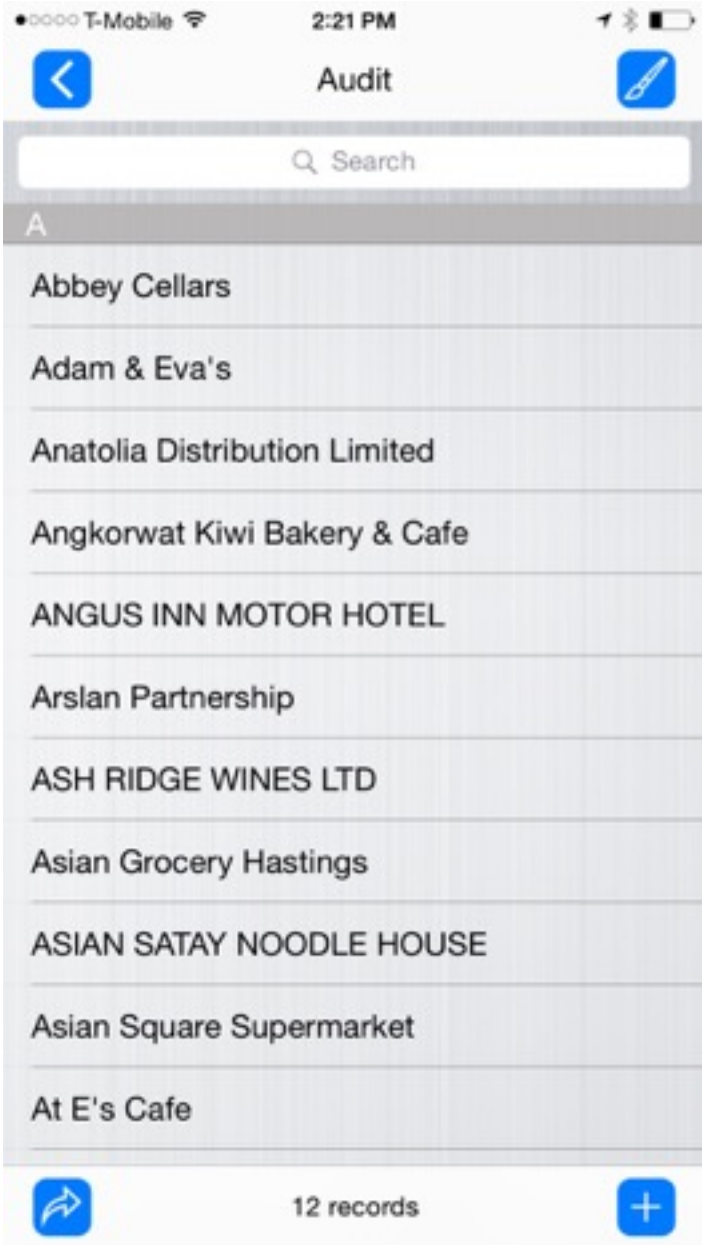
## 10. Locking the Form Designer

- If you want to prevent other users from modifying the form, change the “[Lock form designer on export](#)” setting to ON. When the form is exported, the paint brush icon will be hidden, preventing someone from editing it.



# 11. Viewing Records

- Records are displayed on the record's screen in alphabetical order. Tap on the record to view it.
- A record can also be searched for by entering the name of the record or the content stored in a text field.



## 12. Adding Records

- Each time a form is filled out, a record gets created.
- To add a new record, tap on the plus (+) button.

Records

INVOICE

Bill To:

Pam Johnson December 19, 2011

First Name Last Name Date

Company: Lincoln Nursery

Address: 10145 Vista Circle

City: Austin State: TX Zip: 78727

P.O. # Sales Representative Terms

246531 Paul Ryan Net30

Qty	Price	Description of Work	Amount
2	\$25.00		\$50.00
4	\$15.00		\$60.00
5	\$10.00		\$50.00
3	\$5.00		\$15.00
		Tax	\$12.25
		Total	\$187.25

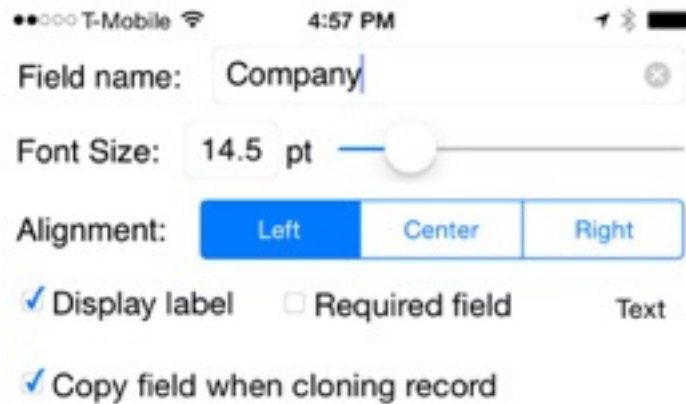
PLEASE MAKE CHECKS PAYABLE TO:

Aztec Software  
13550 Main Street  
Jackson, MS 39216  
(601) 576-7200


Note: If the primary field (e.g., Trade Name) is not filled out, the record will display as **Unnamed** on the record screen.

### 13. Cloning a Record

- Cloning replicates an existing record and copies certain field values that have been configured under the setting “Copy field when cloning record”.



- Tap on the “Clone a Record” button 

T-Mobile 4:44 PM Records 

**INVOICE**





**Bill To:**  
 Pam Johnson December 19, 2011  
First Name Last Name Date

Company: Lincoln Nursery  
 Address: 10145 Vista Circle  
 City: Austin State: TX Zip: 78727

P.O. # Sales Representative Terms  
 246531 Paul Ryan Net30

Qty	Price	Description of Work	Amount
2	\$25.00		\$50.00
4	\$15.00		\$60.00
5	\$10.00		\$50.00
3	\$5.00		\$15.00
		Tax	\$12.25
		Total	\$187.25

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 Aztec Software  
 13550 Main Street  
 Jackson, MS 39216  
 (601) 576-7200

- The fields that were configured to be copied were replicated to the new form.

••••• T-Mobile 5:09 PM 📶 🔋

< Records 📝

**INVOICE**

**Bill To:**  
 Pam Johnson   
 First Name Last Name Date

Company: Lincoln Nursery   
 Address: 10145 Vista Circle   
 City: Austin State: TX Zip: 78727

P.O. #  Sales Representative  Terms: Net30

Qty	Price	Description of Work	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Tax   
 Total

**PLEASE MAKE CHECKS PAYABLE TO:**  
 Aztec Software  
 13550 Main Street  
 Jackson, MS 39216  
 (601) 576-7200

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### 14. Deleting a Record

- To delete a record, swipe right to left.



## 15. Exporting a Record/Form

- Tap on the Share (Arrow) button from the Record screen.
- Select the record(s) to export.
- Tap on the [Export](#) button.

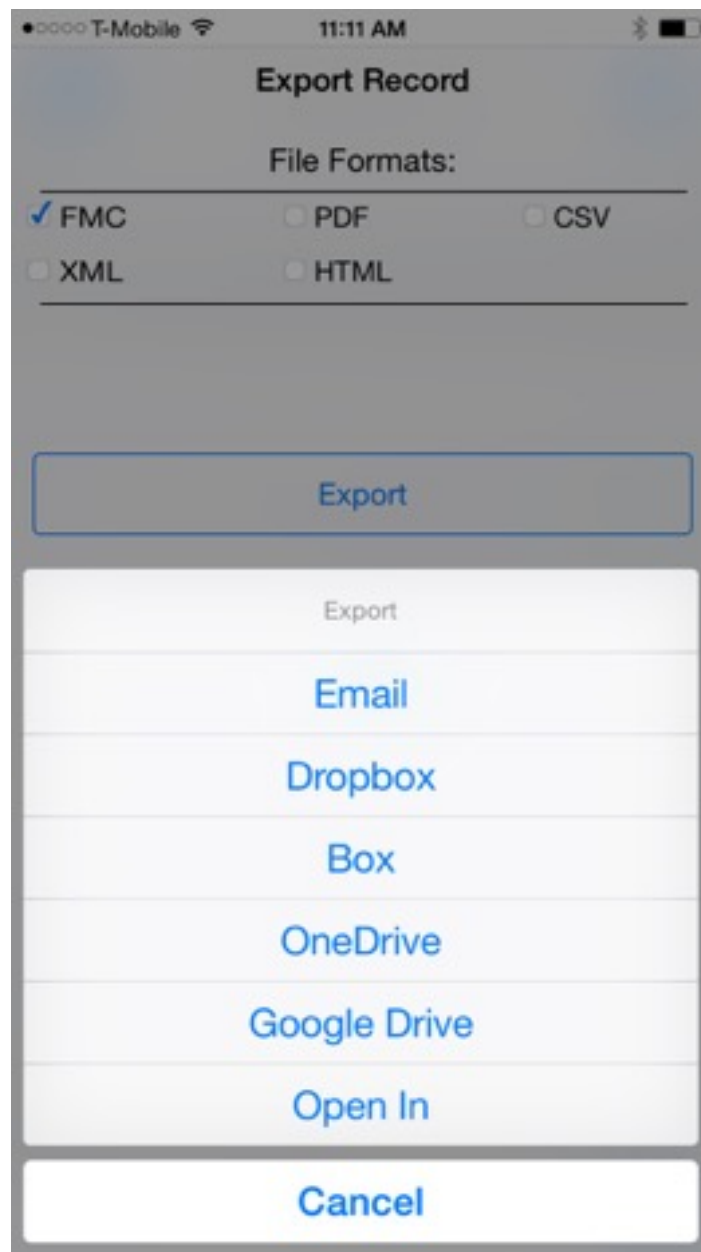


Note: The [Export](#) button can also be accessed from the data entry screen.



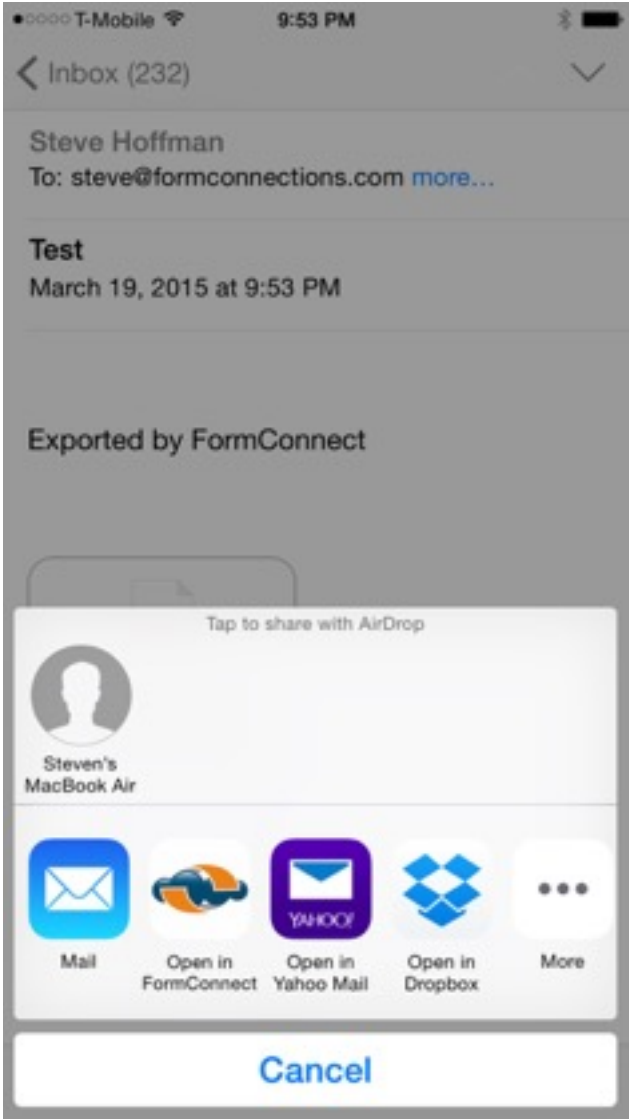
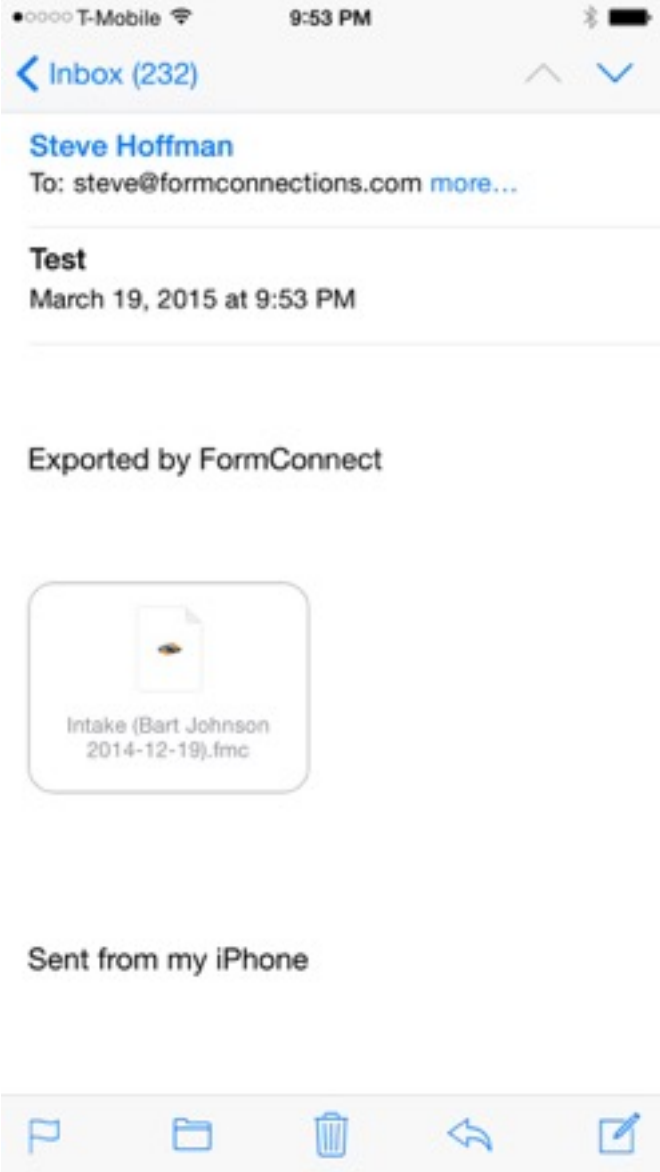
- Select the File Format: [FMC](#), [PDF](#), [CSV](#), [XML](#) or [HTML](#)
- Choose the Export Delivery Method - [Email](#), [Dropbox](#), [Box](#), [OneDrive](#), [Google Drive](#) or [Open In](#).

Note: The FMC file format is for exporting/importing forms between two or more FormConnect users.



## 16. Importing a Record/Form

- Tap on the file attachment. It will display the FormConnect logo.
- Select Open In - FormConnect.



Note: A CSV or XML file can be imported into FormConnect if the form already exists and the fields match.

## 17. Print Function

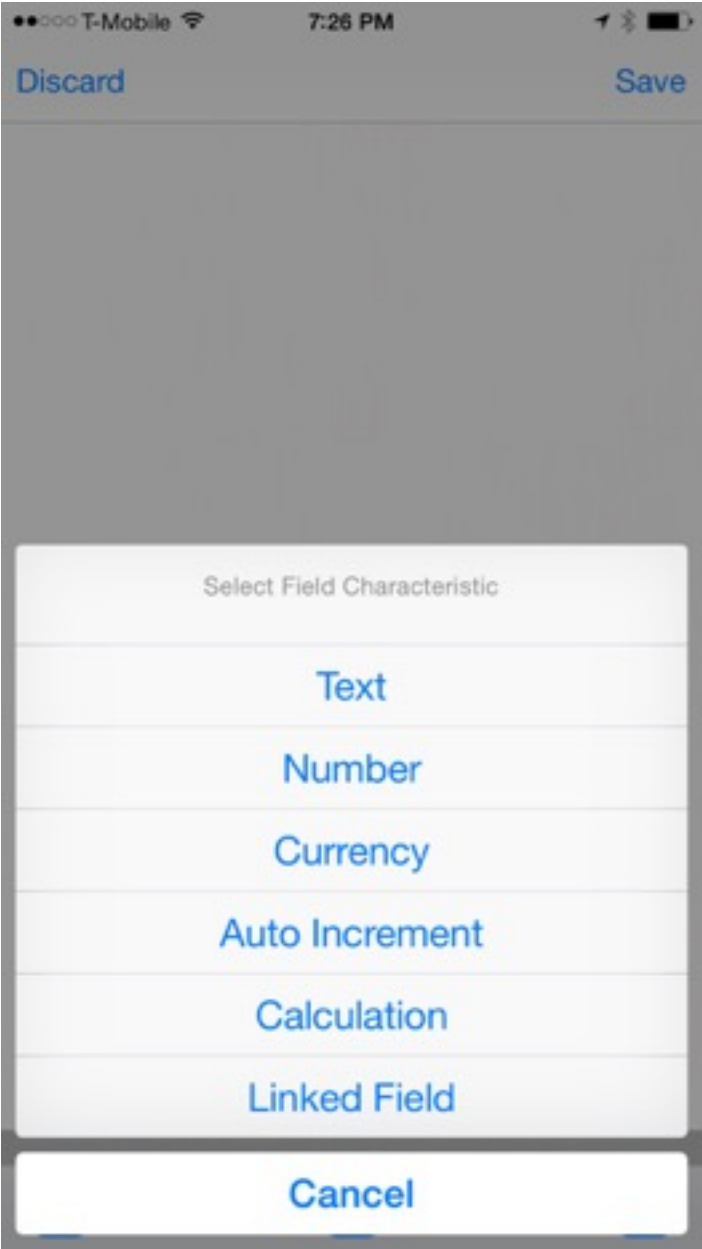
- The print function can be invoked by tapping on the “Arrow” button from the menu bar.
- Make sure the record is checked before selecting the “Print” button.



- Note: To view a list of Air Print supported printers, click on the following: <http://www.apple.com/ipad/features/airprint.html>

## 18. Field Calculations (FormConnect Pro)

- The **Calculation** field characteristic allows you to create formulas for calculating two or more fields.



Note: The Calculation setting can only be defined during the creation of the field.

- Each field has a field ID (A1, A2, B1, B2) that displays when you highlight the calculated field.
- The field IDs are numbered left to right.

Discard Save

INVOICE

Bill To:

A1 A2 A3  
 First Name Last Name Date

Company: A4

Address: A5

City: A6 State: A7 Zip: A8

P.O. #	Sales Representative	Terms
<span>A9</span>	<span>A10</span>	Net30 <span>A11</span>

Qty	Price	Description of Work	Amount
<span>A12</span>	<span>A13</span>	<span>A14</span>	<span>A15</span>
<span>A16</span>	<span>A17</span>	<span>A18</span>	<span>A19</span>
<span>A20</span>	<span>A21</span>	<span>A22</span>	<span>A23</span>
<span>A24</span>	<span>A25</span>	<span>A26</span>	<span>A27</span>

Tax A28

Total

- When you edit the Calculation field, a formula bar displays.
- Formulas use the following computation symbols (+ - \* /).

The screenshot shows a mobile application interface for editing a calculation field. At the top, the status bar displays 'T-Mobile', signal strength, Wi-Fi, the time '9:34 AM', and battery level. The main settings area includes:

- Field name:** A text input field containing 'Total' with a clear button (X) on the right.
- Font Size:** A slider control set to '14.5 pt'.
- Alignment:** Three buttons: 'Left' (selected and highlighted in blue), 'Center', and 'Right'.
- Display label:** A radio button labeled 'Display label' is selected, and the text 'Calculation' is displayed to its right.
- Formula:** A text input field containing the formula 'A15+A19+A23+A27+A28'.
- Minimum:** An empty text input field.
- Maximum:** An empty text input field.



- Formulas work when calculating both rows and columns.

T-Mobile 4:44 PM

< Records ✎

**INVOICE**

**Bill To:**  
 Pam Johnson December 19, 2011  
First Name Last Name Date

Company: Lincoln Nursery  
 Address: 10145 Vista Circle  
 City: Austin State: TX Zip: 78727

P.O. # Sales Representative Terms  
 246531 Paul Ryan Net30

Qty	Price	Description of Work	Amount
2	\$25.00		\$50.00
4	\$15.00		\$60.00
5	\$10.00		\$50.00
3	\$5.00		\$15.00
<b>Tax</b>			\$12.25
<b>Total</b>			\$187.25

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 Aztec Software  
 13550 Main Street  
 Jackson, MS 39216  
 (601) 576-7200

➦ 📁 📄 +

Note: Calculations only work with text and date fields.

## 19. Record Locking



- A record can be locked to prevent changes from being made to it.

•○○○○ T-Mobile 4:44 PM

< Records

INVOICE

Bill To:

Pam Johnson December 19, 2011

First Name Last Name Date

Company: Lincoln Nursery

Address: 10145 Vista Circle

City: Austin State: TX Zip: 78727

P.O. # Sales Representative Terms

246531 Paul Ryan Net30

Qty	Price	Description of Work	Amount
2	\$25.00		\$50.00
4	\$15.00		\$60.00
5	\$10.00		\$50.00
3	\$5.00		\$15.00
		Tax	\$12.25
		Total	\$187.25

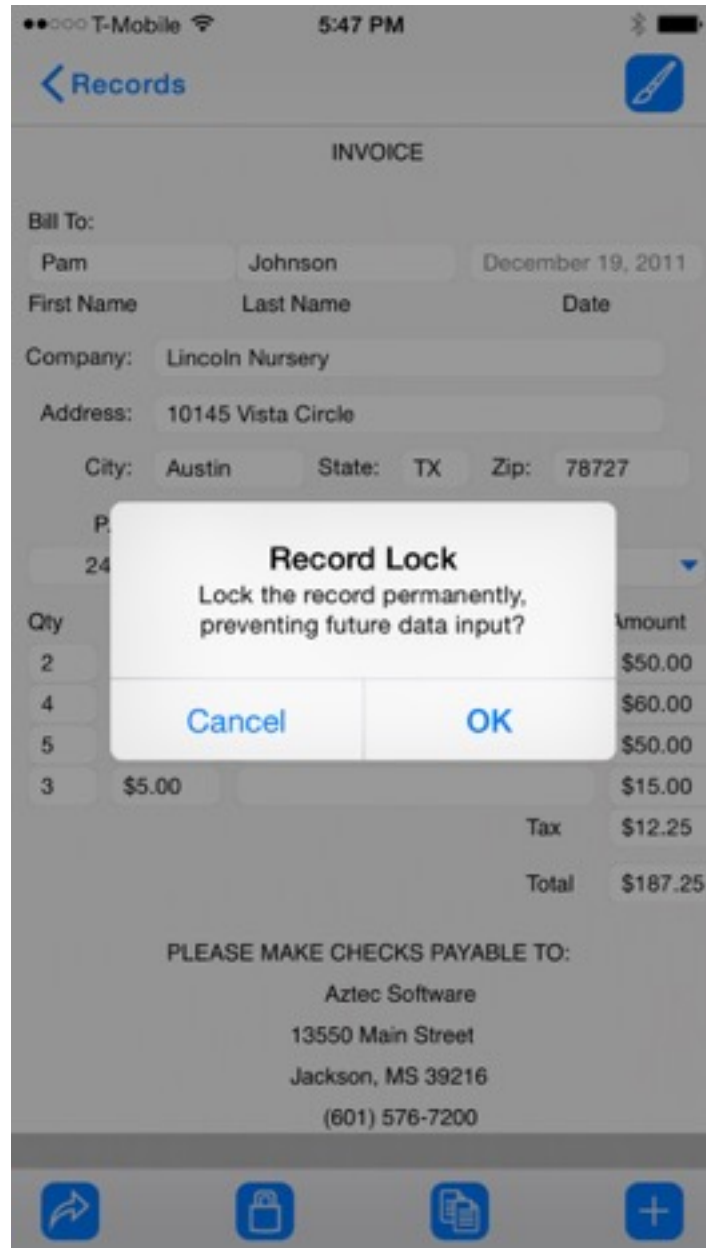
PLEASE MAKE CHECKS PAYABLE TO:

Aztec Software  
13550 Main Street  
Jackson, MS 39216  
(601) 576-7200

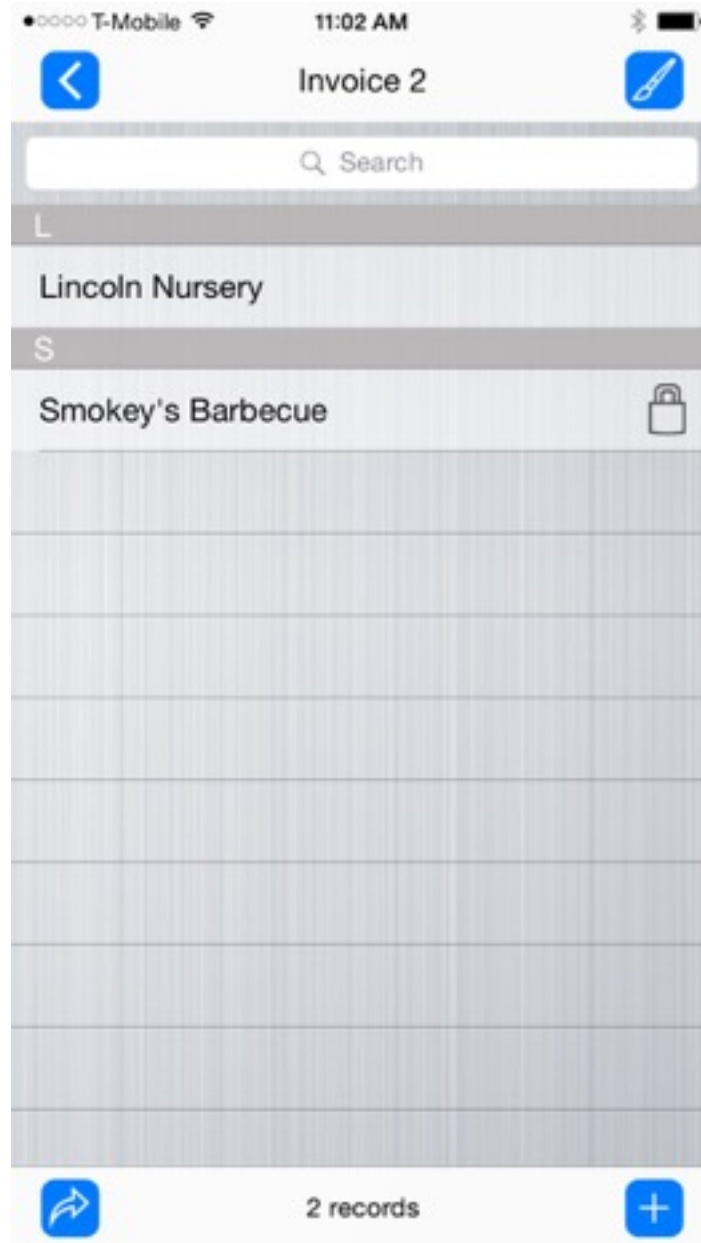
Share Lock Print Add



- A pop-up warning message will display when you tap on the Record Lock button.

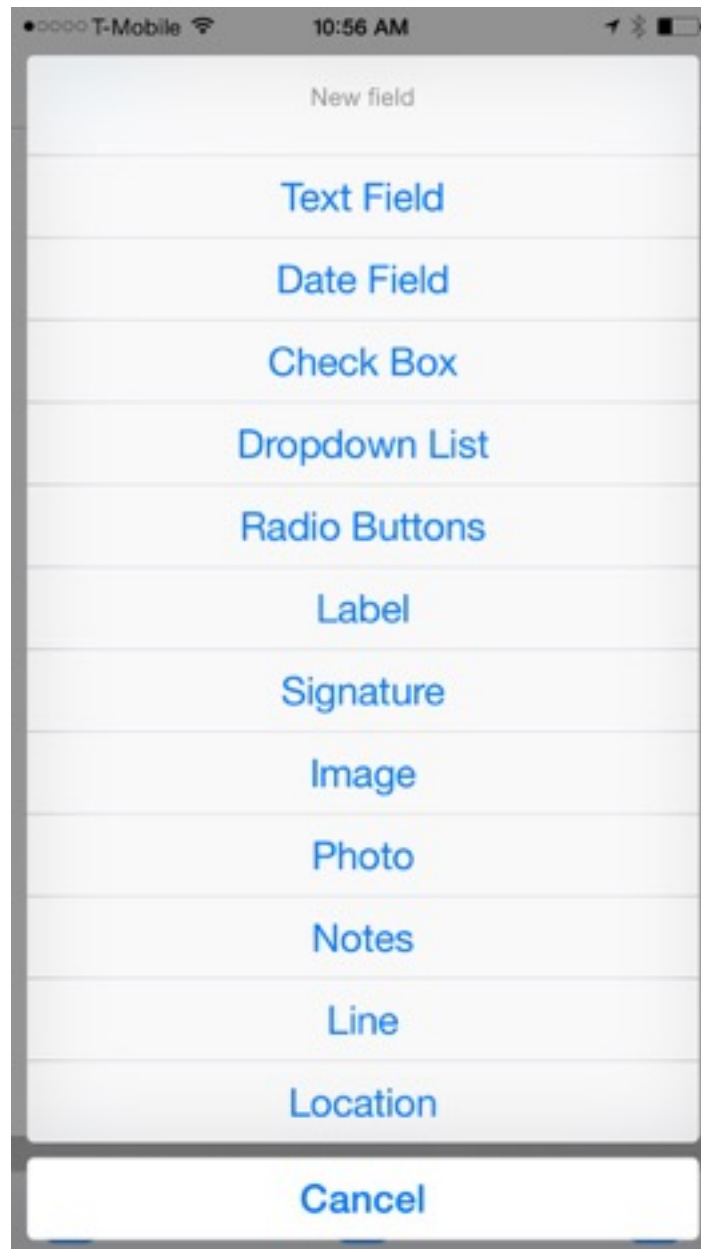


- The “lock” symbol will display next to the record indicating that the record has been locked permanently.



## 20. GPS Field Type (FormConnect Pro)


- A field type called “Location” will automatically input the GPS coordinates into a field.



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- The GPS coordinates are invoked by tapping on the blue arrow to the right of the text box.
- A map is also displayed above the GPS coordinates but this image can be shrunk down by making the field smaller vertically.

T-Mobile 11:42 AM

< Records 

Land Cover:  Evergreen  Dry dipterocarp  Mixed

Bamboo  Urban/village  Paddy field

Old fallow  New fallow  Pine  Agforest

Unstocked  Landmark  Scrub

Mixed broadleaf coniferous  Savanna

Degradation Level:  Low. No signs of logging/disturbance

Medium. Some signs of logging/disturbance

High. Significant signs of logging/disturbance

Vegetation Density:  High Density  Low Density

Understory make-up:  Bamboo heavy  Bamboo light  Little


Dense vegetation  Light vegetation


Forest Category: Conservation Jurisdictional Level: National



Avg tree height (m):




Basal area count:

Basal area factor BAF:

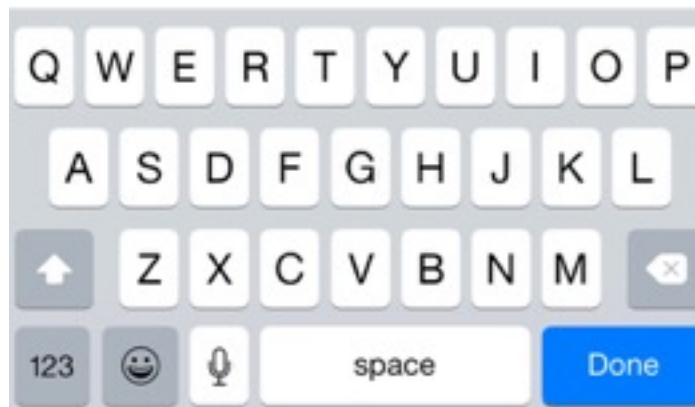
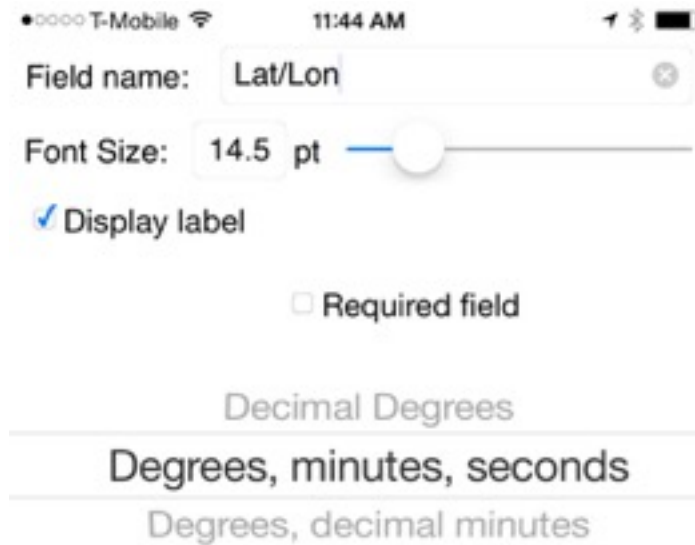
Lat/Lon: 



Page 1 of 3  

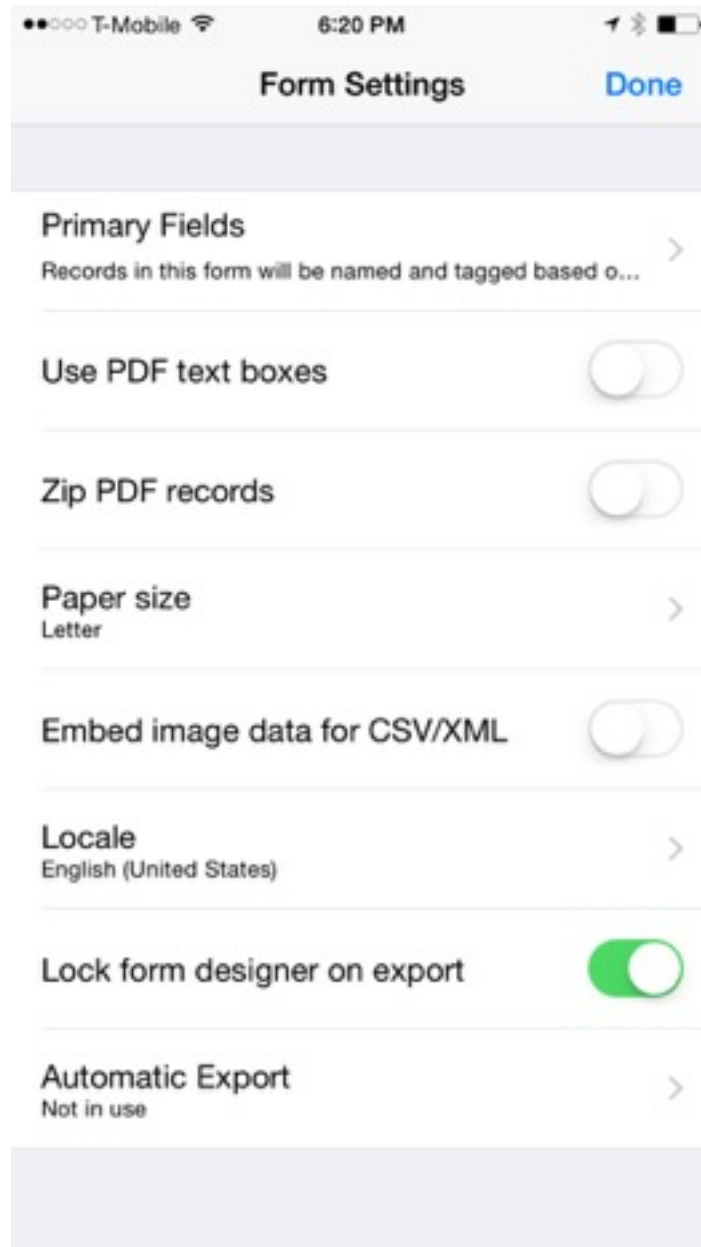
  

- The GPS setting can be displayed in one of three formats: Decimal degrees; Degrees, minutes, seconds; and Degrees, decimal minutes.

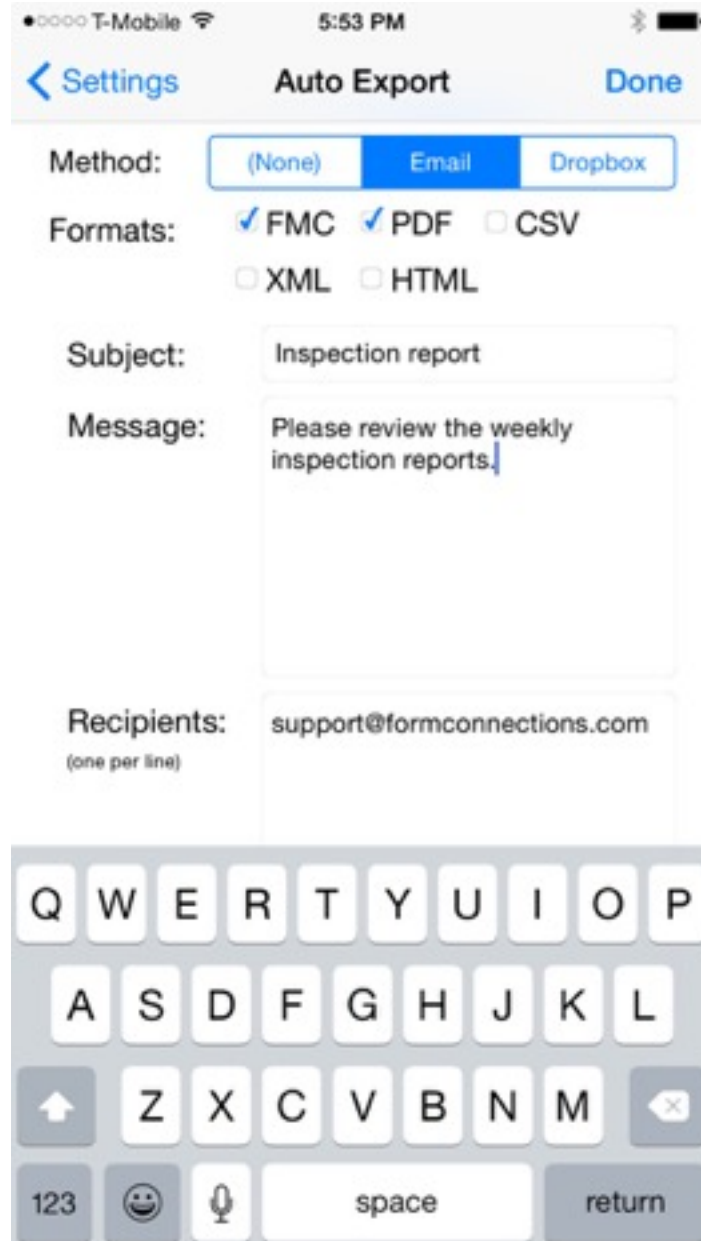


## 21. Automatic Exporting (FormConnect Pro)

- There is a form setting for automating the export of records.



- It can be configured for either Email or Dropbox.
- You can specify the file format, default subject, message, email recipients and default Dropbox directory.



## 22. Photo Annotation

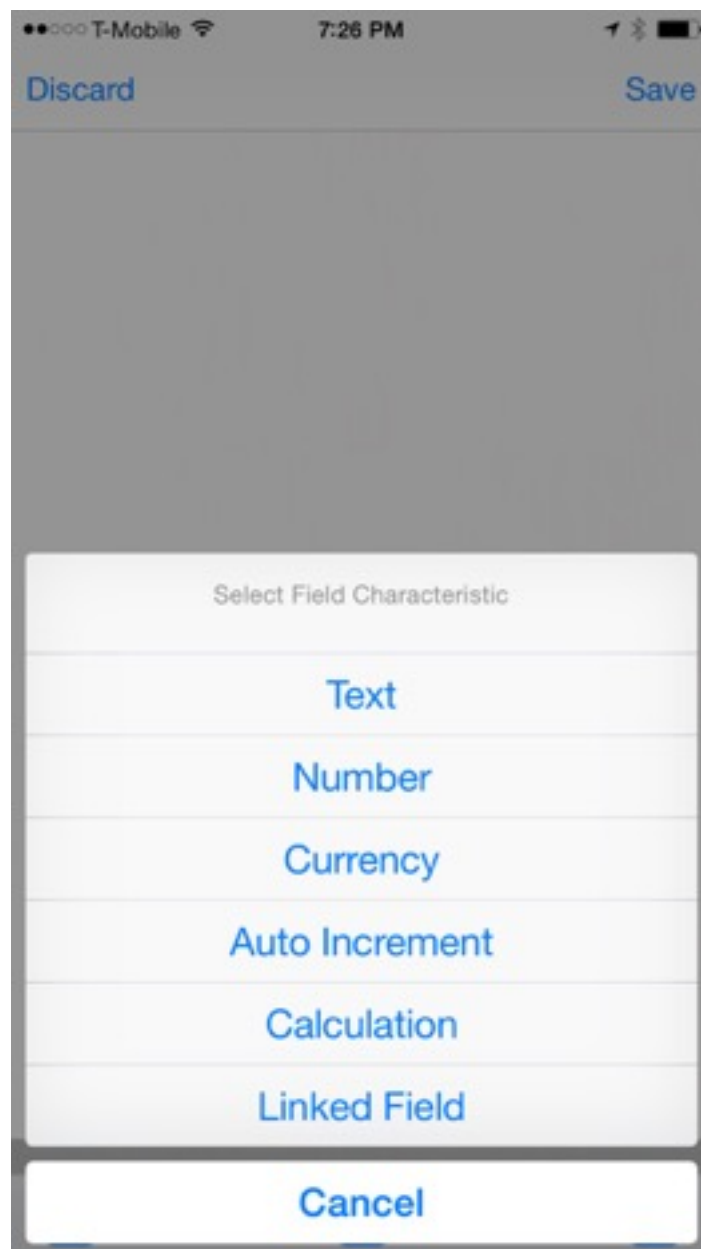
- A photo can be annotated on by tapping on it to enlarge it.
- Select from the color palette to draw on it.





## 23. Linking Fields (FormConnect Pro)

- Two or more fields can be linked together so that data entered in one field will automatically update the second field.
- When creating a new text field, there is an option to specify the field parameter as a “Linked Field”.
- When editing the field, specify which field to link (E.g., Business Name on pg. 2 links to Site Name on pg. 1).



- When editing the field, there is a [Link to:](#) pick list selector where you can choose which field to link (E.g., Business Name field on pg. 3 will be linked to the Site Name field on pg. 1).

Field name: Business Name

Font Size: 14.5 pt

Alignment: Left Center Right

Display label

Link to: Site Name (Page 1)

Choose Linked Field Done

Page 1

Pipe Run

Drain Run

Notes

Site Name

Page 2

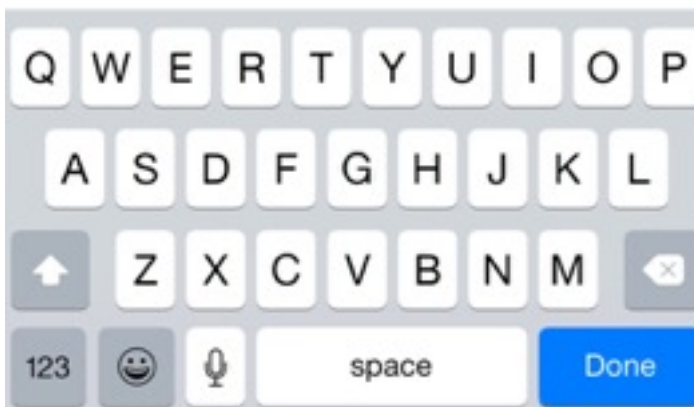
Notes

Page 3

Contact number


Address


Site contact



- Entering the Site Name (Burbury) on pg. 1 automatically updates the Business Name (Burbury) on pg. 3.

T-Mobile 6:06 PM

< Records 

Site Name:  

Date:

Induction Required     Sign In Register     Ast  
 EWP Required     Parking On Site     Acc

---

Room Dimensions L:  W:  H:




Unit Type:  Power:  Si


Existing Unit :  Yes  No  Tr





Roof / Wall Penetrations:   Cr

Crane / EWP     Duct Cover    Pipe Run:  
 Drain Pump     Special Brackets    Drain Run:  
 Make Good Required (see notes)


Notes:

Page 1 of 3 

T-Mobile 6:06 PM

< Records 


Site Contact Details





Business Name:

Site contact:

Contact number:

Address:

Page 3 of 3 

## 24. Required Field (FormConnect Pro)

- A required field is a field where data must be entered in order for the record to be saved.
- There is a field setting where you can specify that the field is required.
- There is also an option to specify a minimum and maximum value.

The image shows a configuration panel for a text field. The field name is 'Current Rdg'. The font size is set to 14.5 pt with a slider control. The alignment is set to 'Center' among three options: 'Left', 'Center', and 'Right'. There are three checkboxes: 'Display label' (unchecked), 'Required field' (checked), and 'Number' (unchecked). Below these is an unchecked checkbox for 'Copy field when cloning record'. At the bottom, there are two empty input boxes for 'Minimum' and 'Maximum' values.

Text Field:

Font Size:  pt

Alignment:

Display label  Required field  Number

Copy field when cloning record

Minimum:  Maximum:

## 25. iPhone/iPad Compatibility

- Forms created on either the iPhone or iPad can be shared between the two devices assuming you have the FormConnect app installed on both of them.
- The form will look identical on both the iPhone and the iPad but the user interface will look a little different as the screen size is much bigger on the iPad.

The screenshot shows the iPhone version of the FormConnect app. The top status bar displays 'T-Mobile', signal strength, Wi-Fi, and the time '6:15 PM'. The app header includes a back arrow, the word 'Records', and a pencil icon. The form title is 'Audit Checklist'. The data entry fields are as follows: Trade Name: Abbey Cellars; Situation Address: 1769 Maraekakaho Road-HASTINGS 4120; EH No.: EH08/0074, PID: 112732, EHO: Mark McLean; Contact: W & J Haworth, Date: (empty); Postal Address: PO Box 8115-HAVELOCK NORTH 4157; 'Correct?' radio buttons: Yes (selected), No; Category: FoodRegs; 'Insert correct address if applicable:' (empty); Category: Medium (dropdown), Activity Rating: (dropdown); Risk Rating: B (dropdown), Grading: (dropdown); Fee/ Instruction: (empty); Exemption No.: (empty), Peer review: (dropdown); OFFICE USE ONLY section: CAR? Yes (checked), No; Date CARs are to be completed by?: (empty), Follow up date: (empty); Other required completion dates?: (empty), Follow up date: (empty); Overall audit outcome: (empty).

The screenshot shows the iPad version of the FormConnect app. The top status bar displays 'iPod', signal strength, Wi-Fi, and the time '6:15 PM'. The app header includes a 'Records' button, a pencil icon, a share icon, and a plus icon. The form title is 'Audit Checklist'. The data entry fields are as follows: Trade Name: Abbey Cellars; Situation Address: 1769 Maraekakaho Road-HASTINGS 4120; EH No.: EH08/0074, PID: 112732, EHO: Mark McLean; Contact: W & J Haworth, Date: (empty); Postal Address: PO Box 8115-HAVELOCK NORTH 4157; 'Correct?' radio buttons: Yes (selected), No; Category: FoodRegs; 'Insert correct address if applicable:' (empty); Category: Medium (dropdown), Activity Rating: High (dropdown); Risk Rating: B (dropdown), Grading: Very Good (dropdown); Fee/ Instruction: (empty); Exemption No.: (empty), Peer review: (dropdown); OFFICE USE ONLY section: CAR? Yes (checked), No; Date CARs are to be completed by?: (empty), Follow up date: (empty); Other required completion dates?: (empty), Follow up date: (empty); Overall audit outcome: Acceptable conformance (selected), Unacceptable conformance, Non compliance; Page 1 of 35.