Help Documentation

V2.0

Copyright

FormConnect Help

1. Overview

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

2. Viewing Forms

- The main screen displays all of your forms. You can navigate
  through all of your forms by either swiping with your finger or
  tapping on the "white" dots at the bottom of the screen. Tapping on
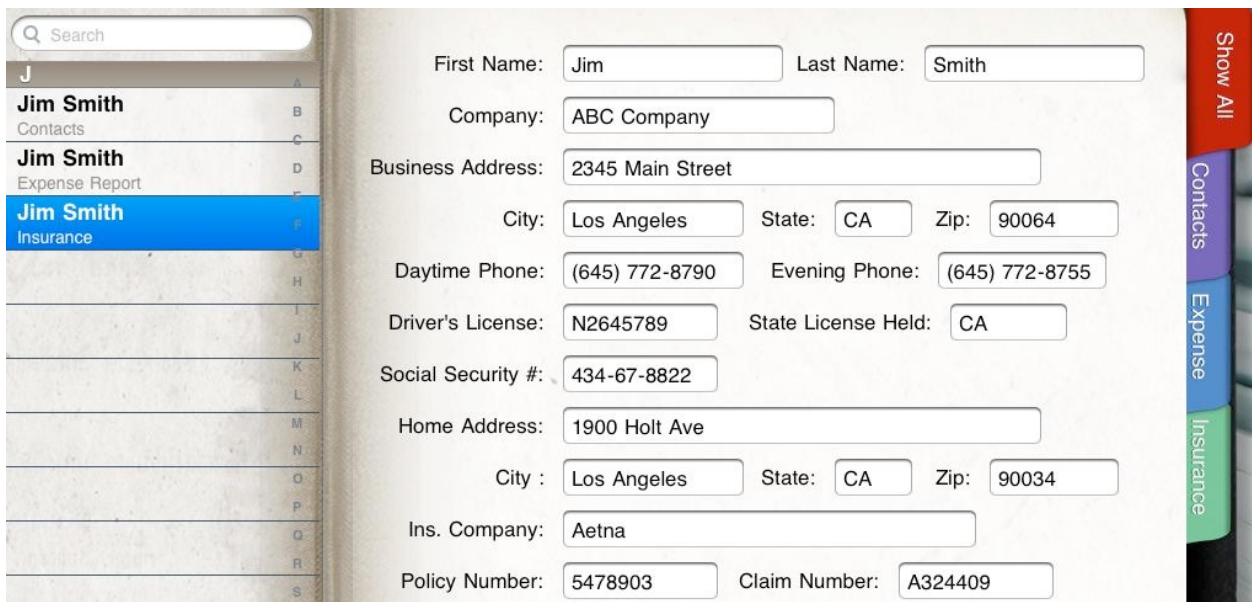 the form will open it.

3. Viewing Tags

- The "tags" view displays all records that have a tag associated with it. A tag is a way to group records that are related.

4. Viewing Tagged Records

- All records associated with the forms that they are linked to can be viewed in a folder tab.
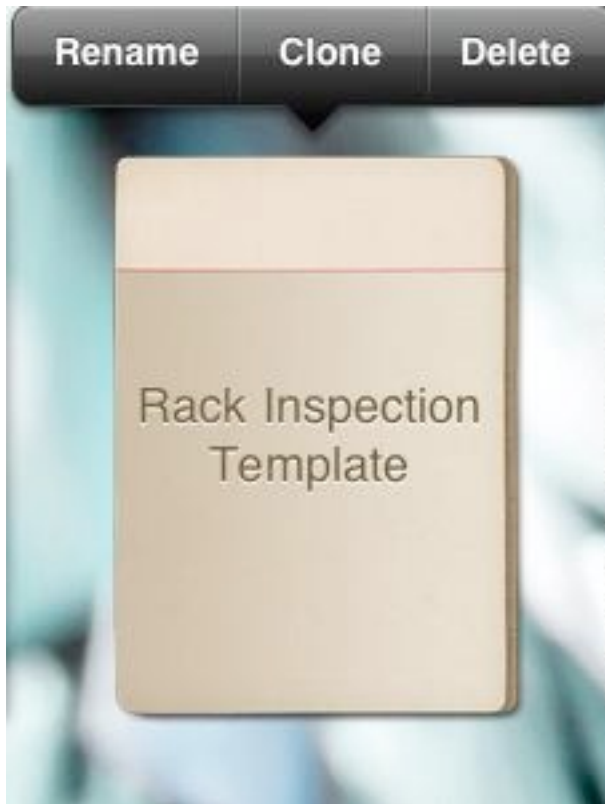
5. Creating a New Form

- There is a tab at the bottom of the screen that you tap on to create a new form. You will be prompted for a form name and then taken into the "form editor".
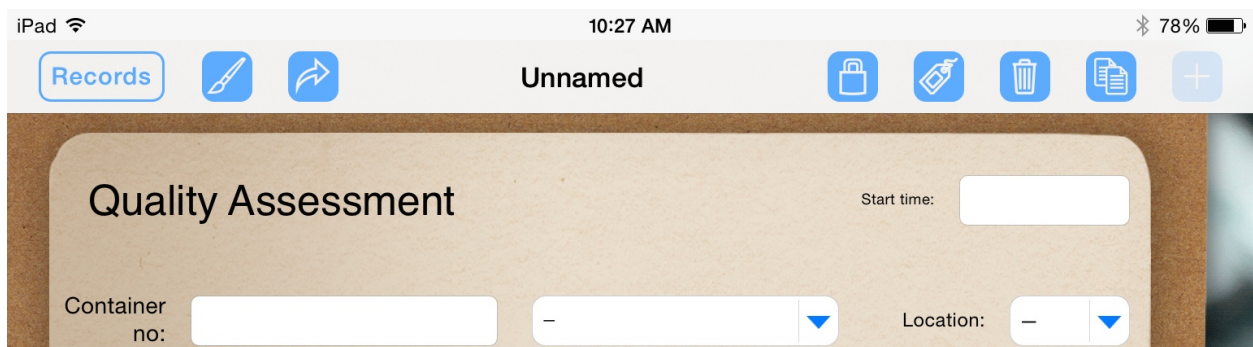
6. Renaming, Cloning and Deleting a Form

- Tap on the form for two seconds and a pop-up screen will display with the following options (Rename Clone Delete).
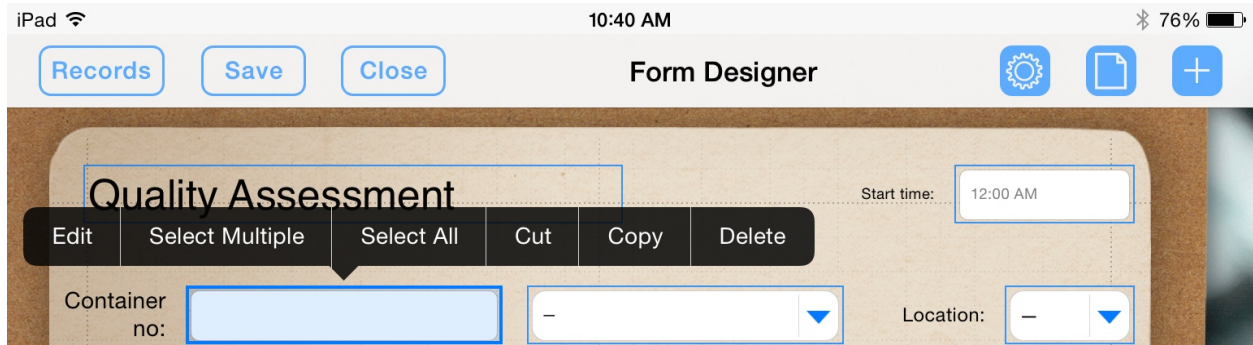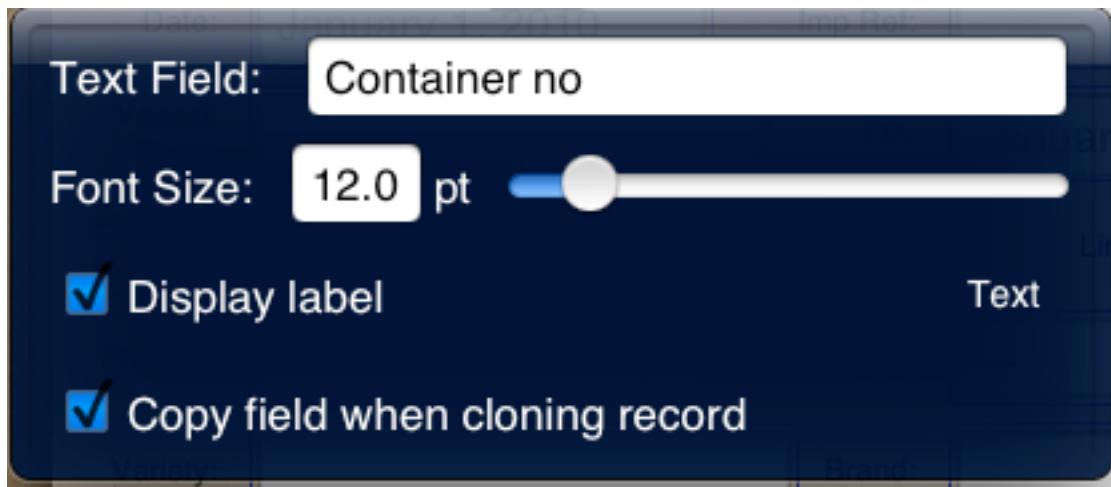

7. Editing a Form

- Tap on the "Paint brush" icon to open the editor.

- Tap on the field that you wish to edit and a pop-up screen will display.

- The "Select Multiple" and "Select All" choices specify one or more fields that can be copied or deleted.

- Tap on the "Edit" button and a field parameter screen will display. You can specify the field name, the font size, the option to hide the text and an option to copy a field when cloning a record.

8. Adding Fields

- Tap on the plus symbol (+).

9. Creating a Drop-Down list

- There is no limit to the number of items in your list. You can organize them in any order that you want by dragging the items up and down.

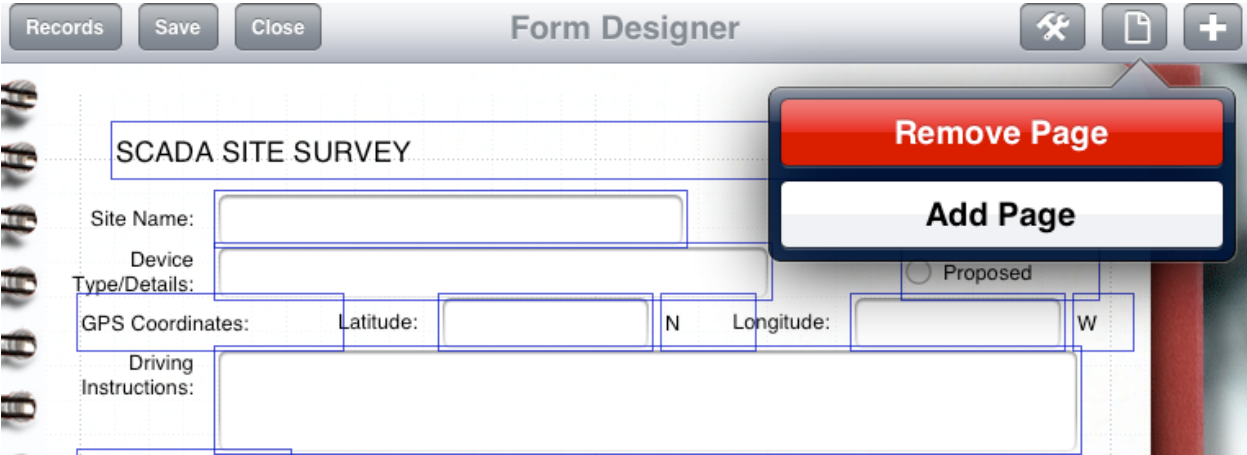Dropdown List: Skills

Font Size: 14.5 pt

☑ Display label

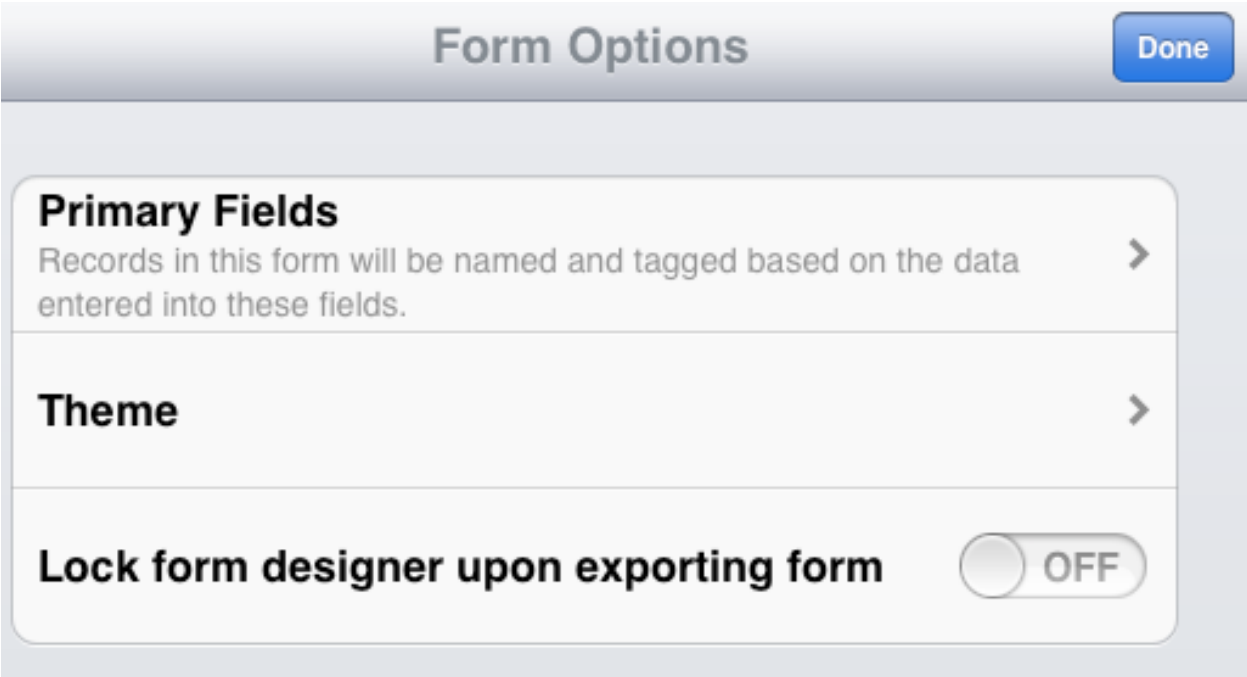☐ Copy field when cloning record

○ Allow non-selection

○   Typing > 60 wpm   Remove

●   Microsoft Project   Remove

○   Doodler   Remove

○   Golfer   Remove

10. Adding/Removing Pages

Tap on the [icon] to add or remove a page.

11. Setting Form Options [icon]

12. Specifying the Primary Field(s)

- The primary field is where records are named.

Form Options	Primary Fields	Done

Currently used fields:

First Name:	≡
Last Name:	≡

Drag fields up to use them for record names.

Other fields:

Driver's License:	≡
State License Held:	≡
Social Security #:	≡
Daytime Phone:	≡
Evening Phone:	≡

13. Adding a Template Theme

- A template theme is how the form looks on the screen when you're filling it out.
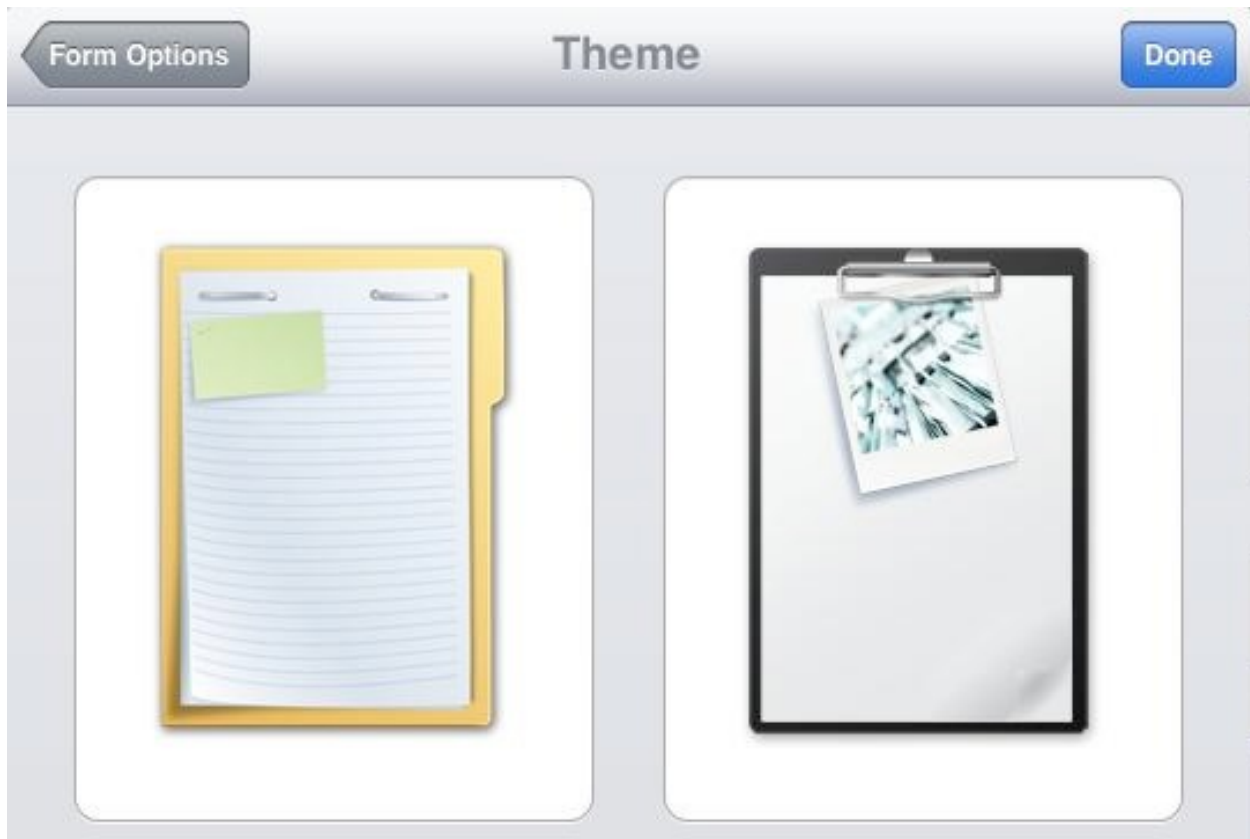
14. Locking the Form Designer Upon Exporting a Form

- When exporting the form to other users, you can lock the edit function so that others cannot edit the form.

Form Options   Done

Primary Fields
Records in this form will be named and tagged based on the data entered into these fields. >

Theme >

Lock form designer upon exporting form   ON
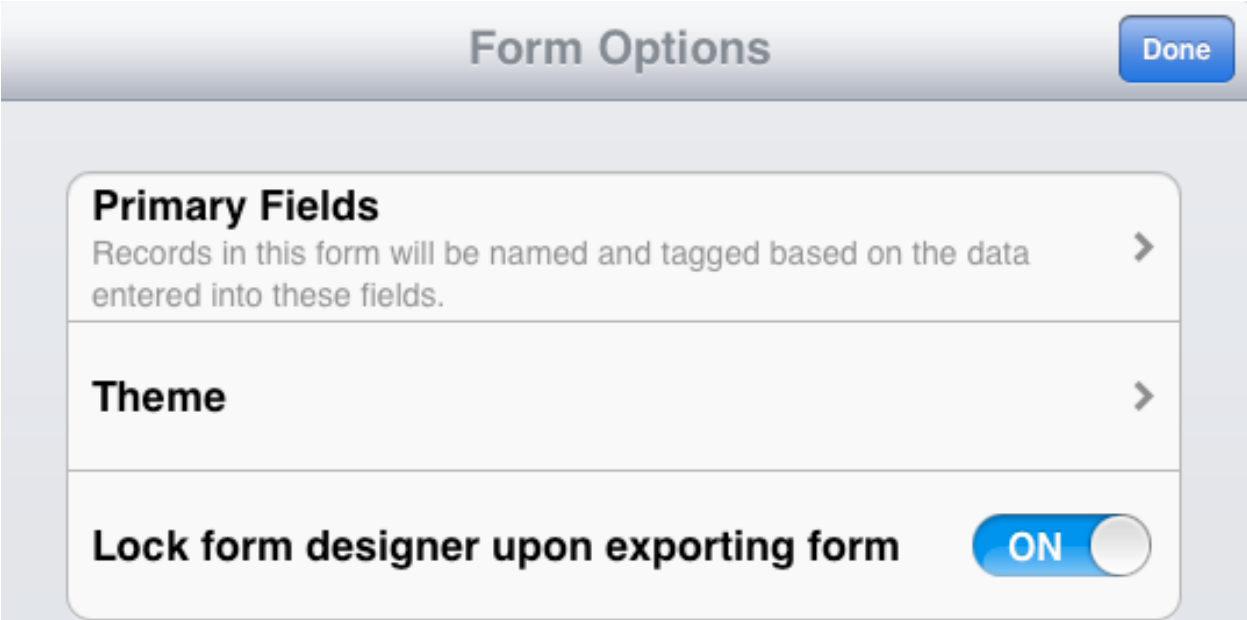
15. Viewing Records [Records]

- Records are displayed on the left frame based on the primary field settings.

16. Adding a Record

- To add a new record, tap on the plus symbol (+).

17. Cloning a Record

- Cloning adds a new record and copies certain values that have been configured under the field setting.

18. Deleting a Record

- To delete a record, tap on the "trash" symbol.

19. Tagging a Record

- A record automatically gets tagged with the primary field setting. You can also tag other values with that record by tapping on the "tag" icon.

20. Exporting a Record/Form

- Tap on the Share (Arrow) button on the menu bar.

- Select the record(s) or the Form template.

- Select "Export".

- Select the File Format: FMC, PDF, CSV, XML or HTML

- Choose the Export Delivery Method - Email, Dropbox, Box, Google Drive, Open In, etc.

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

21. Importing a Record/Form

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

- Select Copy to - FormConnect.
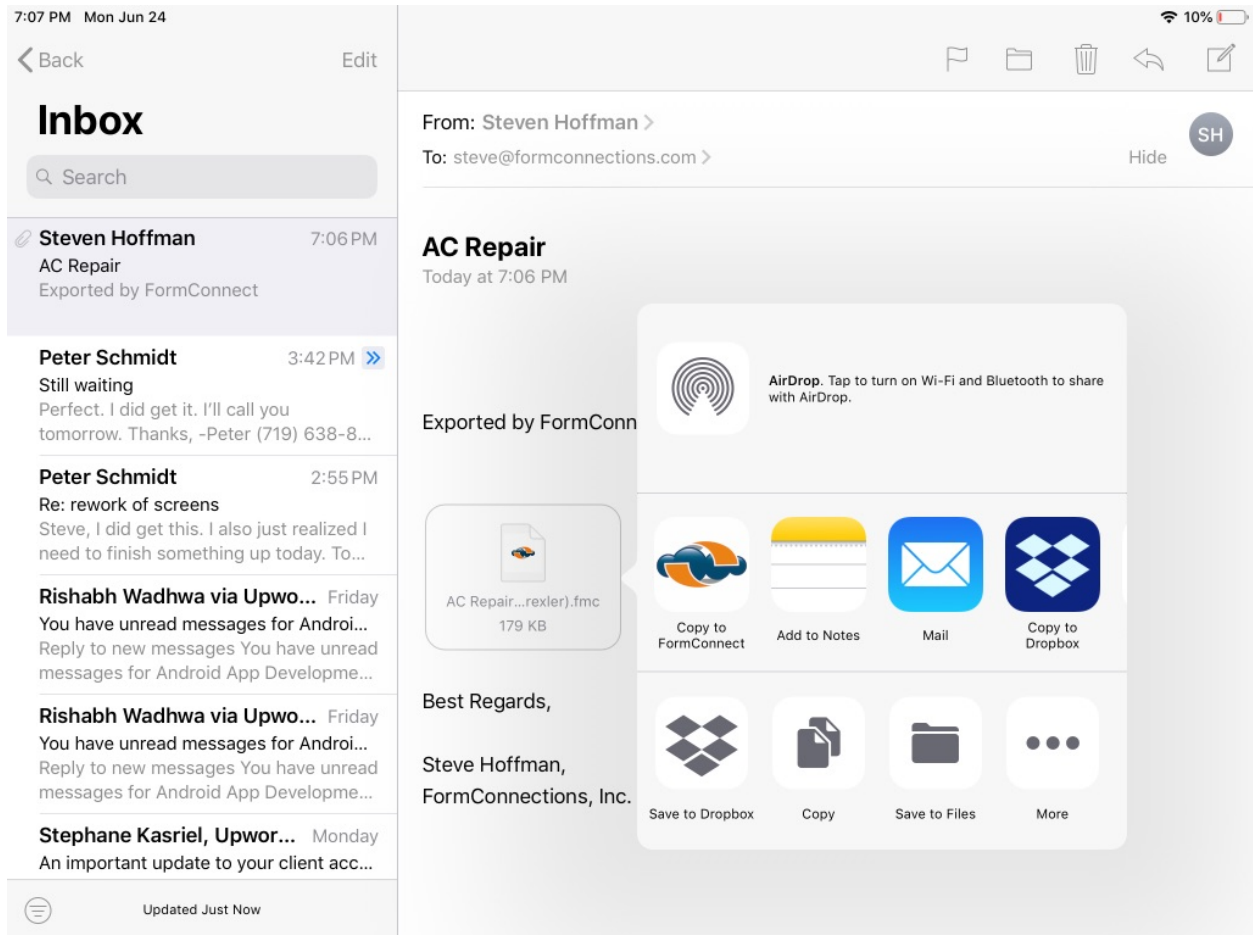
22. Print Function

- Tap on the Share (Arrow) button on the menu bar.

- Make sure the record is ticked and choose the "Print" button.

- Select the appropriate printer, the page range and the number of copies.
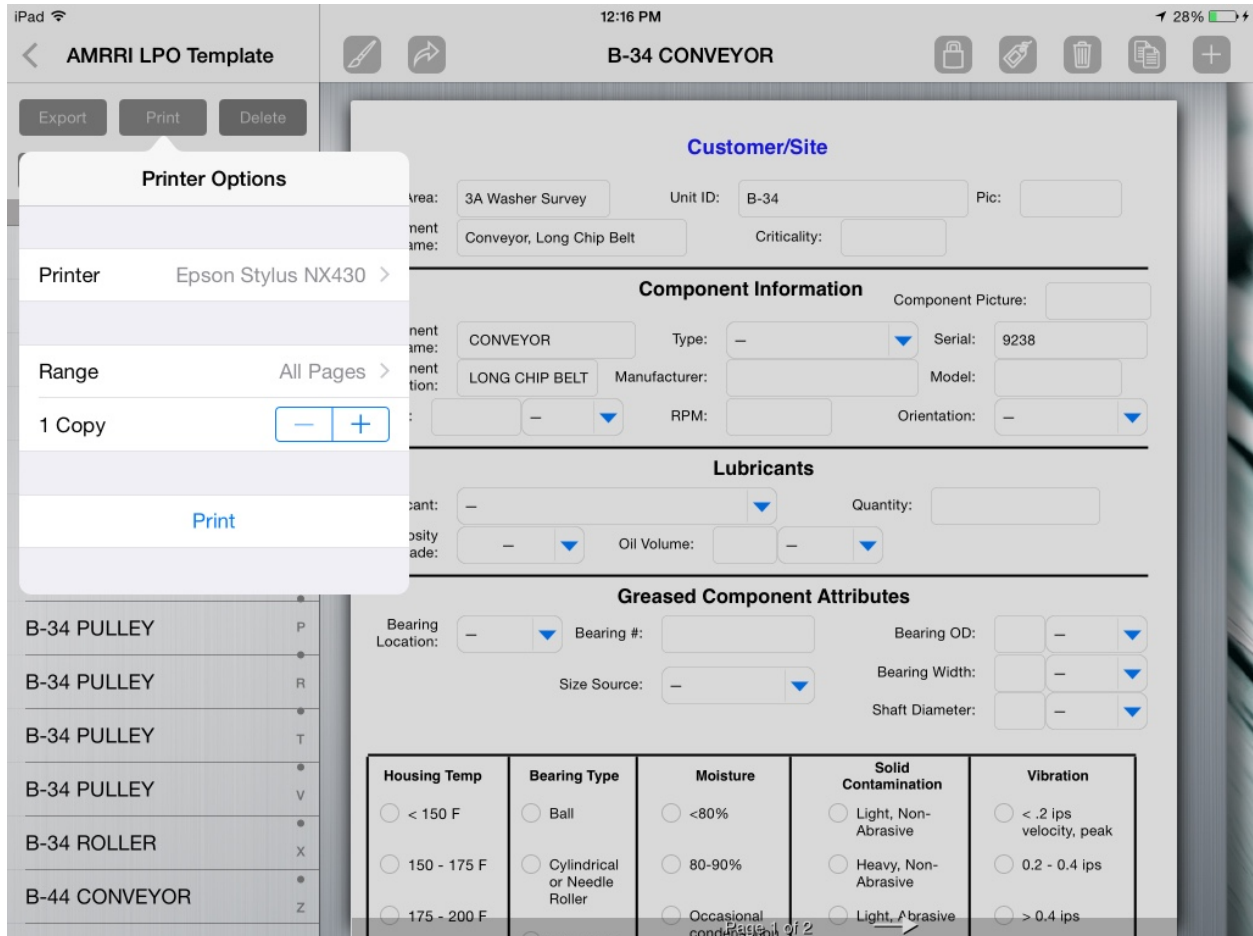
- Note: To view a list of Air Print supported printers, click on the following: https://support.apple.com/en-us/HT201311

23. Field Calculations (FormConnect Pro)

- FormConnect Pro includes a field type setting (Calculation) that you can choose when creating a new text or date field.
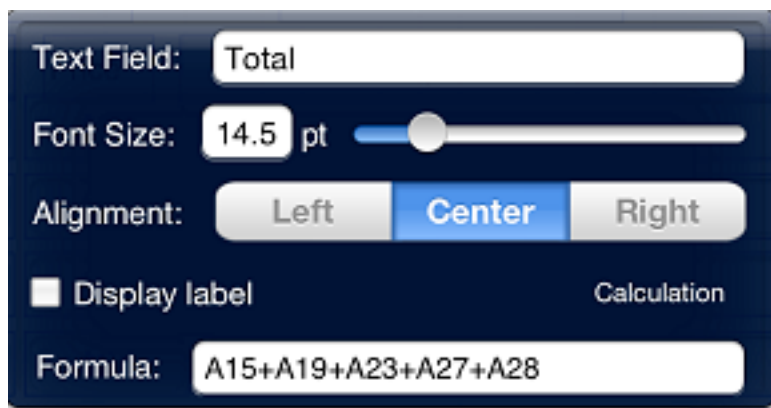
- A formula can be entered into a field to calculate the value between two or more fields.

- Formulas require the following computational symbols (+ - * /).

- Each field has a field ID (A1, A2, B1, B2) that displays when you enter a formula.

Qty	Price	Description of Work	Amount
A12	A13	A14	A15
A16	A17	A18	A19
A20	A21	A22	A23
A24	A25	A26	A27
		Tax	A28
		Total	

24. Record Locking ( ).

- A record can be locked to prevent changes from being made to it. The "lock" symbol will display next to the record indicating the record has been locked.

- Note: Once a record has been locked, it cannot be unlocked.

25. Kiosk Mode (FormConnect Pro)
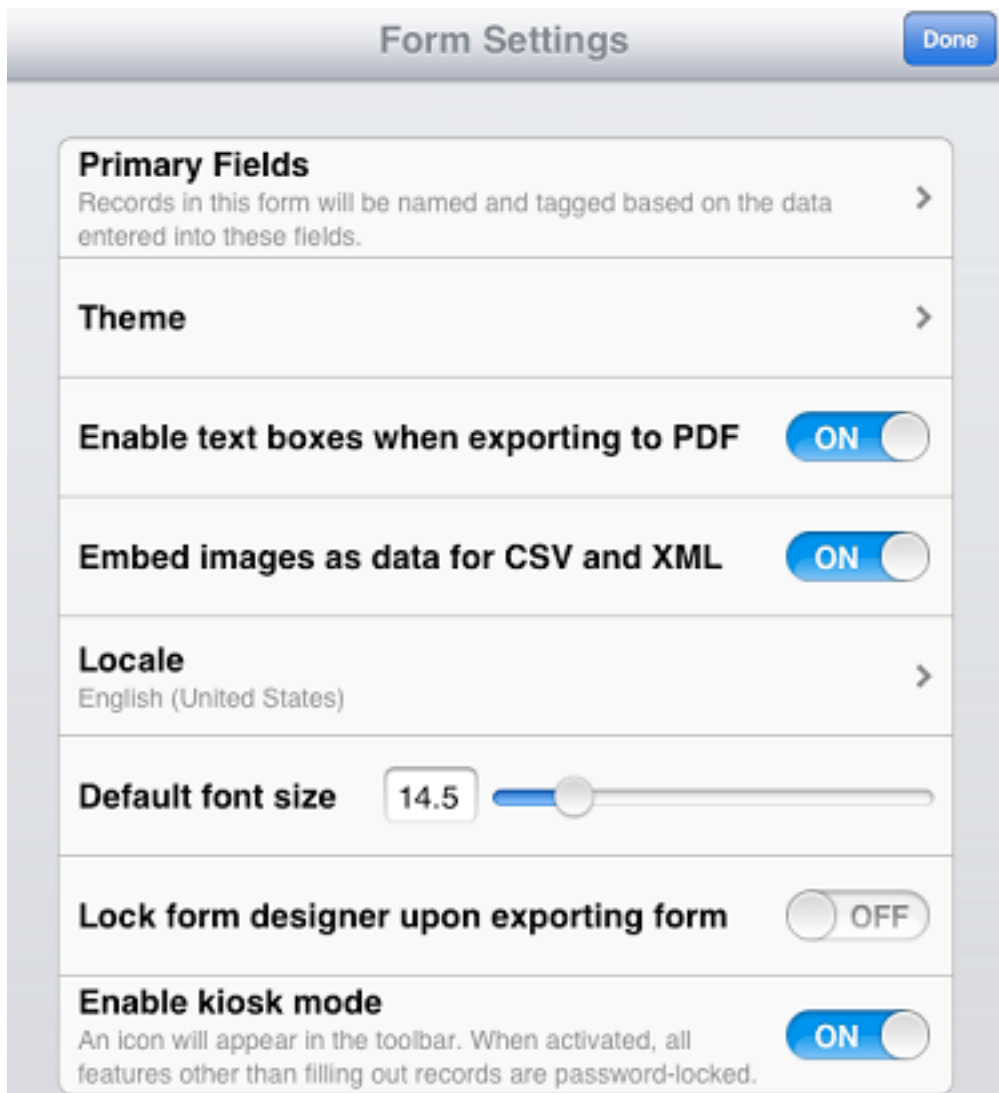
- A display mode that hides the menu bar icons and only displays the Submit, Clear and Kiosk ( ) buttons for data entry.

- Customer records are not visible to the person filling out the form when in kiosk mode.

- Kiosk mode must be set to "ON" in the "Form Settings" before this function operates.

• Kiosk mode ( ) requires a password to invoke and exit this mode.

• Kiosk mode will work in both portrait and landscape but works best in portrait mode.

26. GPS Field Type (FormConnect Pro)

- A field type called "Location" that automatically inputs the GPS location into a field.

- The GPS setting can be displayed in one of three formats: Decimal Degrees; Degrees, minutes, seconds; and Degrees, decimal minutes. All three field formats can be enlarged to include a map as well.

- 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.

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

27. Automatic Exporting (FormConnect Pro)

- There is a form setting for automating the export of records.
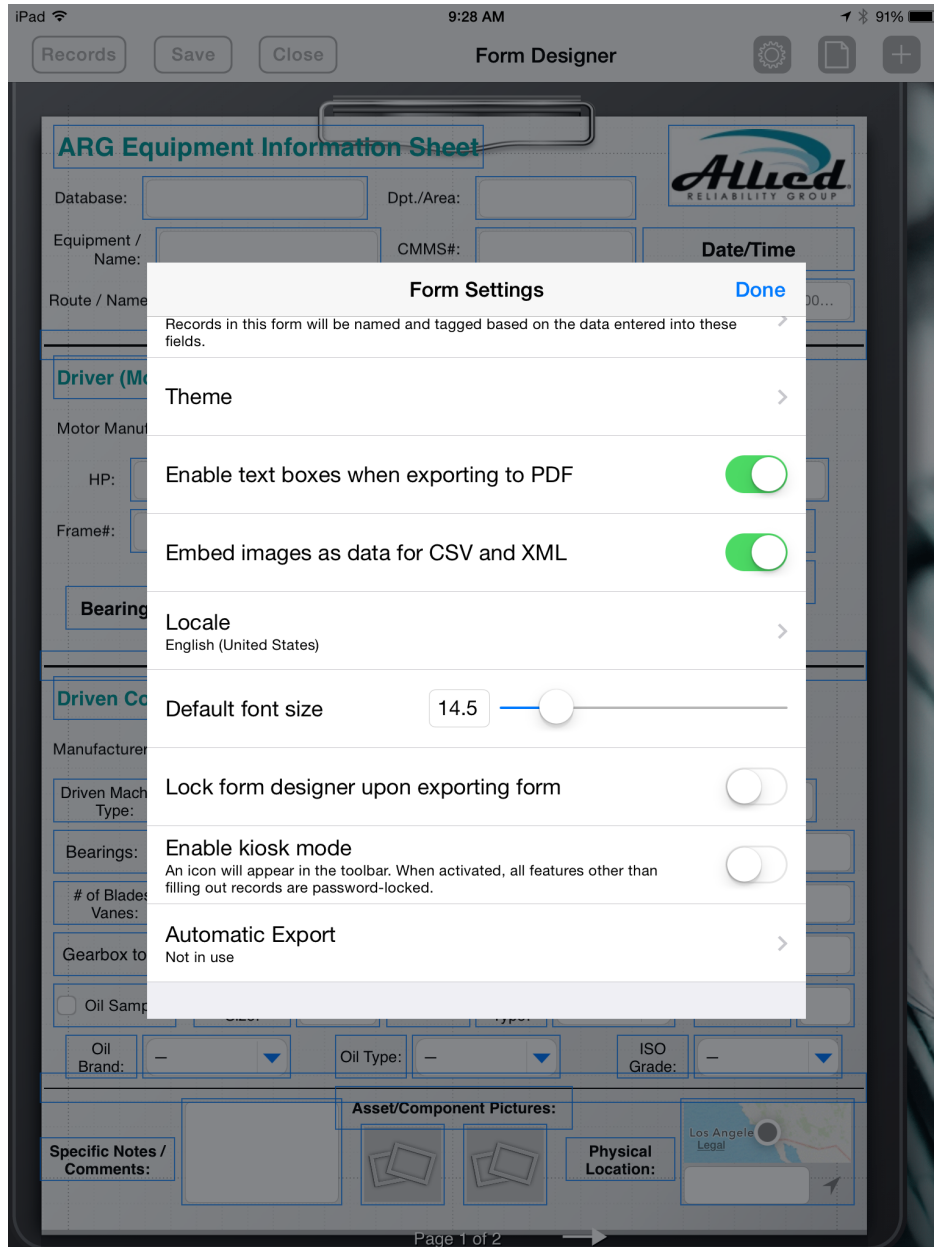
- It can be configured for either Email, Dropbox. Box, Google Drive and Microsoft One Drive.

- You can specify the file format, default subject, message, email recipients and default Dropbox directory.
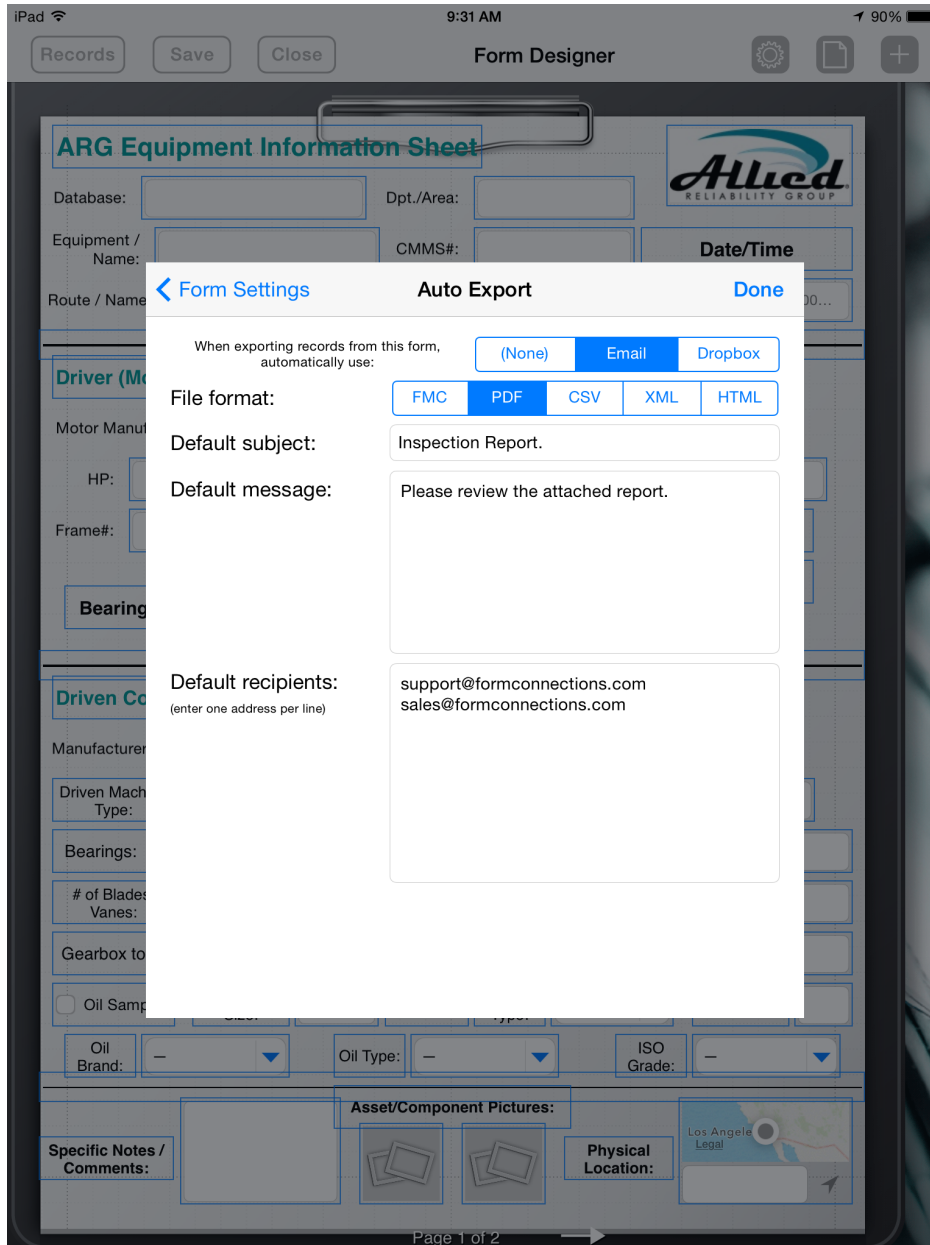
- The export process begins when you tap on the arrow icon ⬆️, select the record(s) and tap the export button.

28. Photo Annotation

- A photo can be annotated on by tapping on it to enlarge it. Then selecting a color palette to draw on it.

29. Linking Fields (FormConnect Pro)

- Two or more fields can be linked together so that data entered into one field automatically updates the second field.

- When creating a new text field, there is an option to specify the field parameter as a "Linked Field" and then define which field to link (E.g., Business Name on pg. 2 links to Site Name on pg. 1).
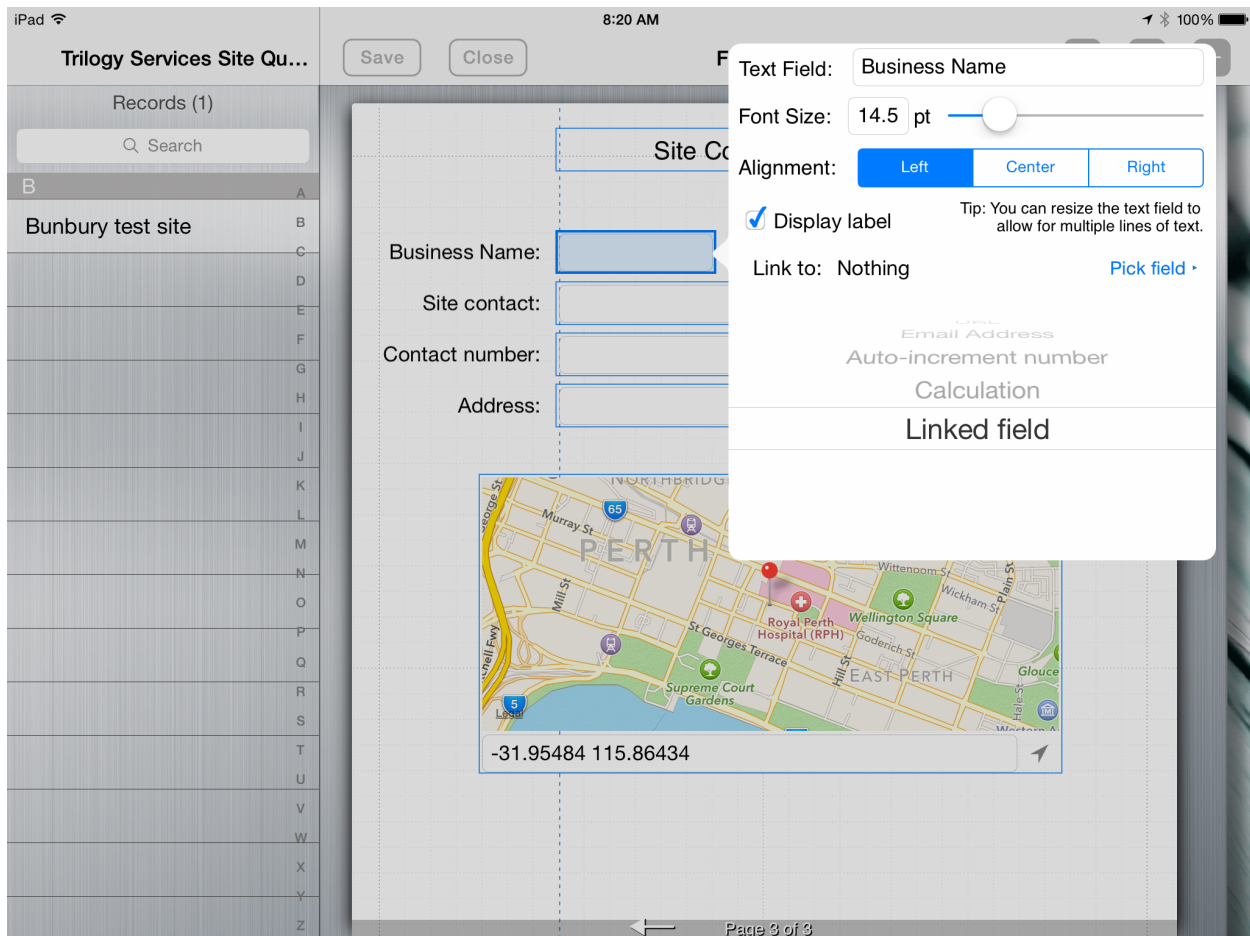
30. Linking Fields (FormConnect Pro)
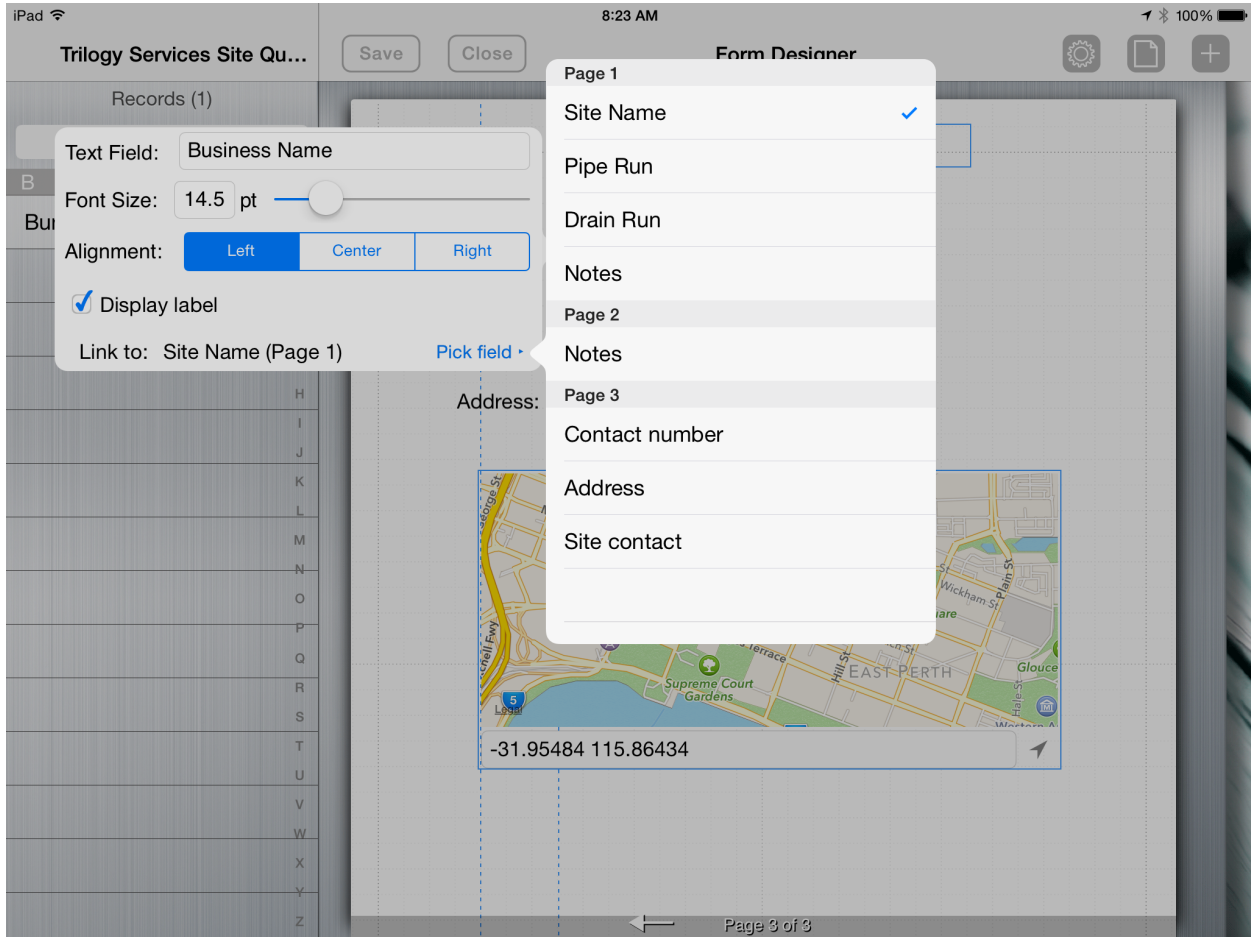
31. Required Field (FormConnect Pro)

- 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.

Text Field:	Current Rdg

Font Size: 14.5 pt

Alignment:	Left	Center	Right

☐ Display label   ☑ Required field   Number

☐ Copy field when cloning record

Minimum: _____   Maximum: _____

32. Form Sync (FormConnect Pro+)

- A mechanism that syncs forms between two or more iOS devices.

- Syncing automatically occurs whenever you have Internet connectivity, are logged into iCloud with your Apple ID and you have the iCloud Drive setting enabled.

- Syncing will occur between a FormConnect user that owns multiple iOS devices or between two or more FormConnect users with separate Apple IDs that are collaborating on the same form.

- The following events will trigger syncing of records: adding a new record, modifying an existing record or deleting a record.
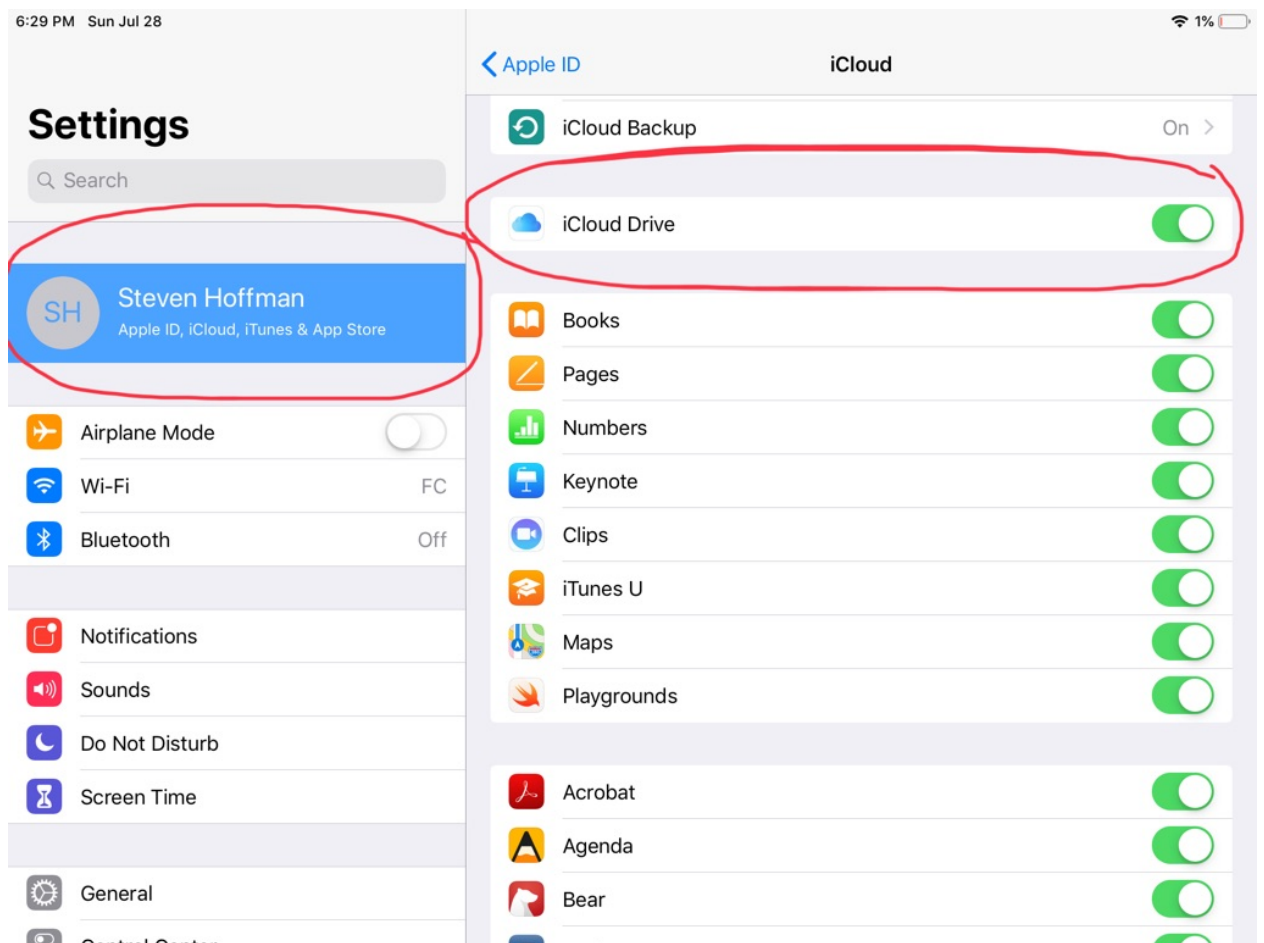
32. Form Sync (FormConnect Pro+)

- The first time syncing occurs, the cloud icon at the bottom of the screen will begin rotating indicating that syncing is occurring. You can tap on this icon and monitor the status if you so desire.

- The syncing process can take several minutes or more to process depending upon how many forms and records you have.

- It's recommended that you complete the syncing process on one device before you start on another device. Also, if you have duplicate forms or records on the second device, delete them before starting the syncing process.

32. Form Sync (FormConnect Pro+)

- Form syncing is a powerful feature for sharing forms and data between multiple devices. It is because of this capability that it is not recommended that you share your Apple ID with other users.

- Giving another user access to your Apple ID means that they have access to the data on your device via the syncing functionality and therefore by deleting a form on their device, that change would sync to your device as well.

- If you wish to sync forms and records between multiple users, it is recommended that each person use their own Apple ID, subscribe to FormConnect Pro+ separately and use the Team Collaboration feature.
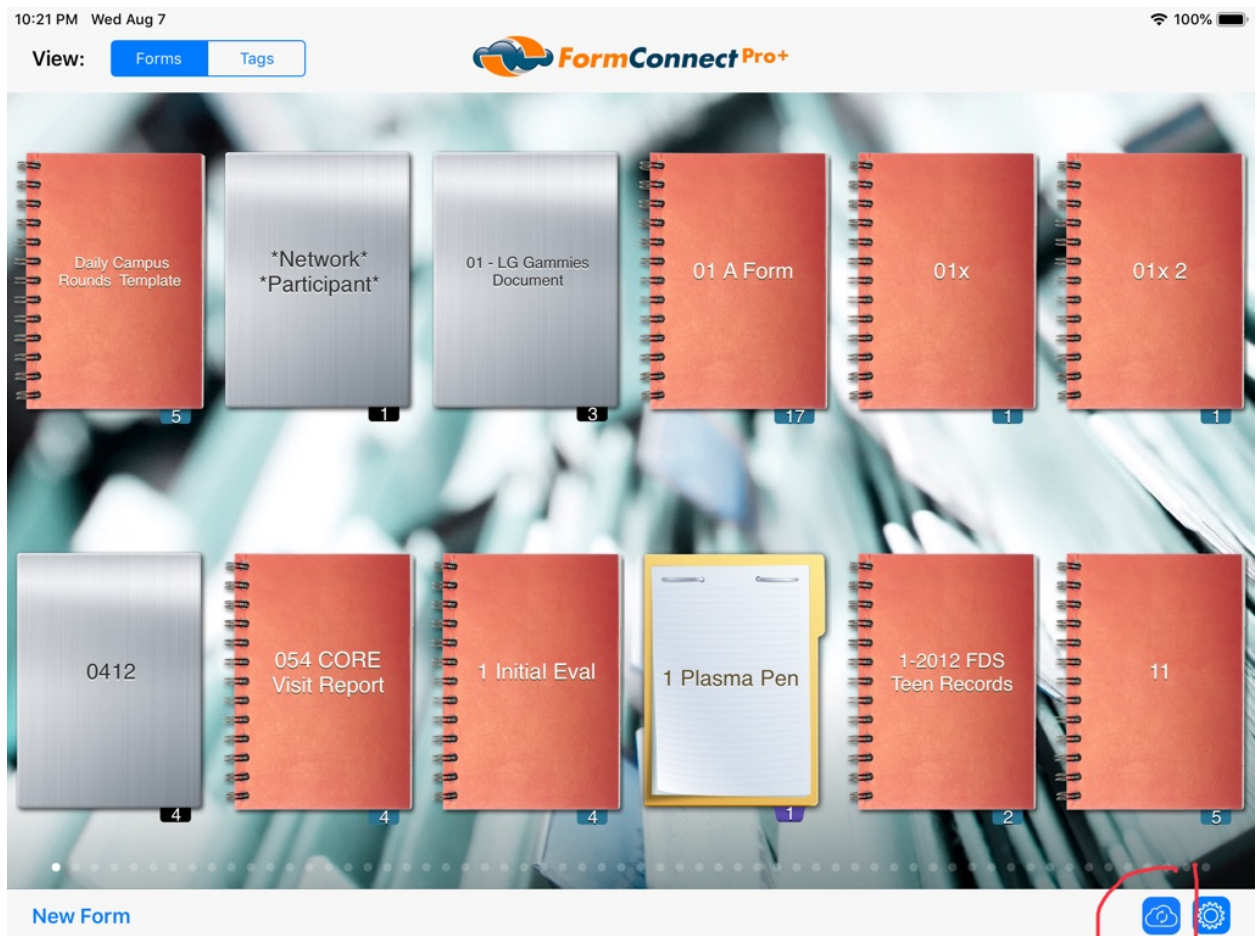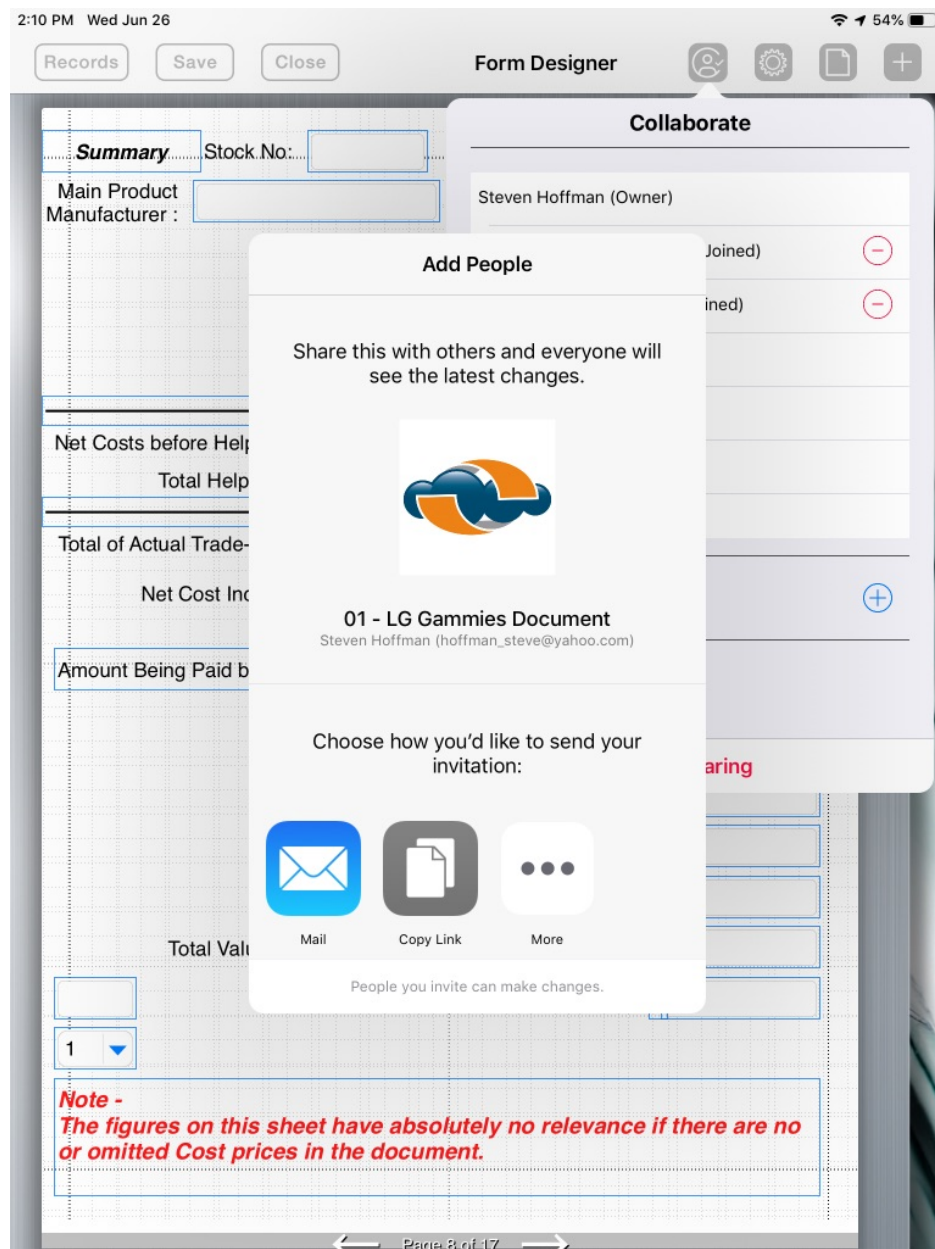
33. Team Collaboration (FormConnect Pro+)

- The owner of a form can invite other users to share this form and collaborate with them on it together if they are both subscribed to the FormConnect Pro+ app.

- Tap on the collaborate button and then the Add People (+) button.
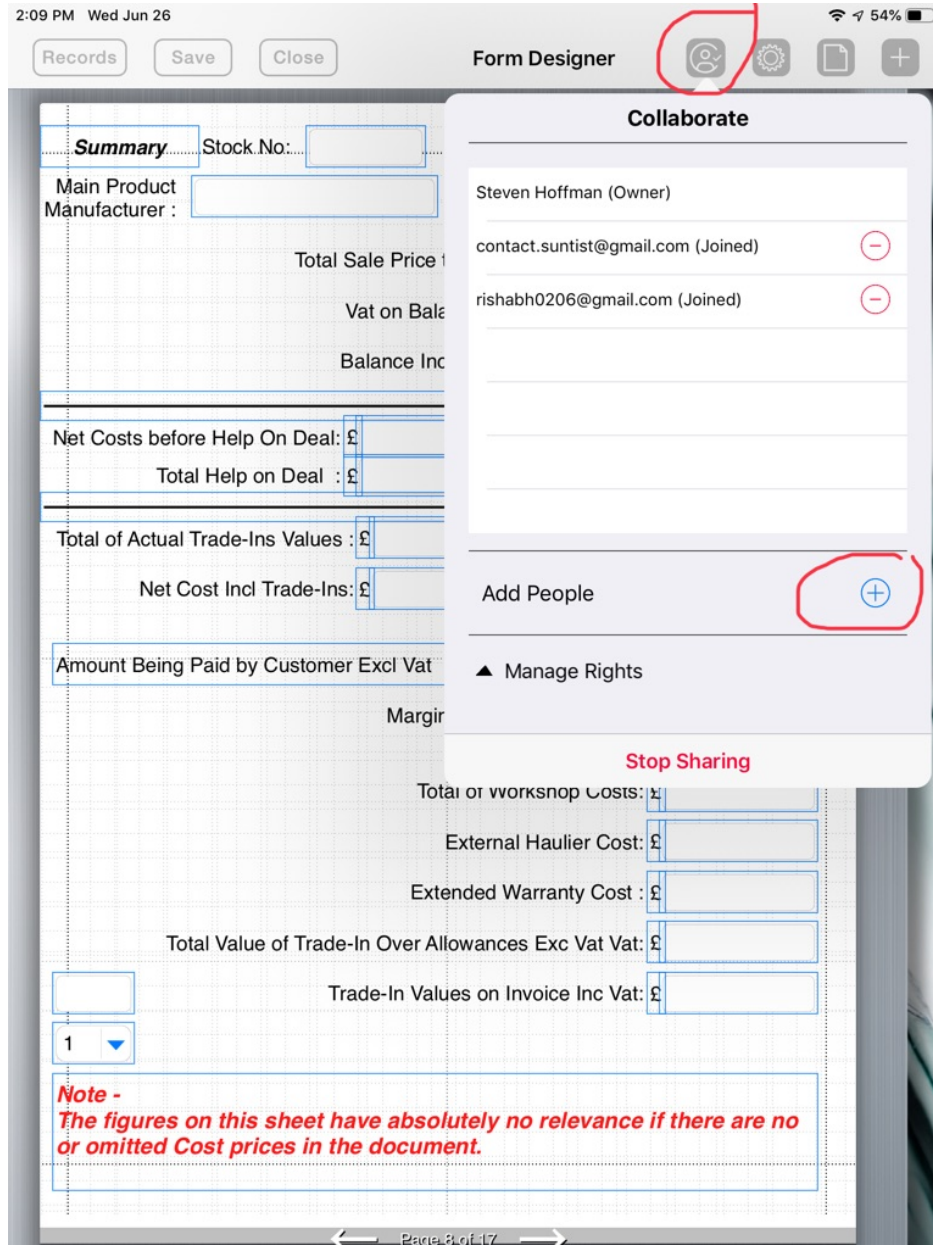
33. Team Collaboration (FormConnect Pro+)

- You can then specify whether to email the invitation or copy a url link.

- The invitation should be sent to the user's Apple ID email address.

33. Team Collaboration (FormConnect Pro+)

- You can then specify the type of syncing rights the form owner will share with other team members by tapping on **Manage Rights**.
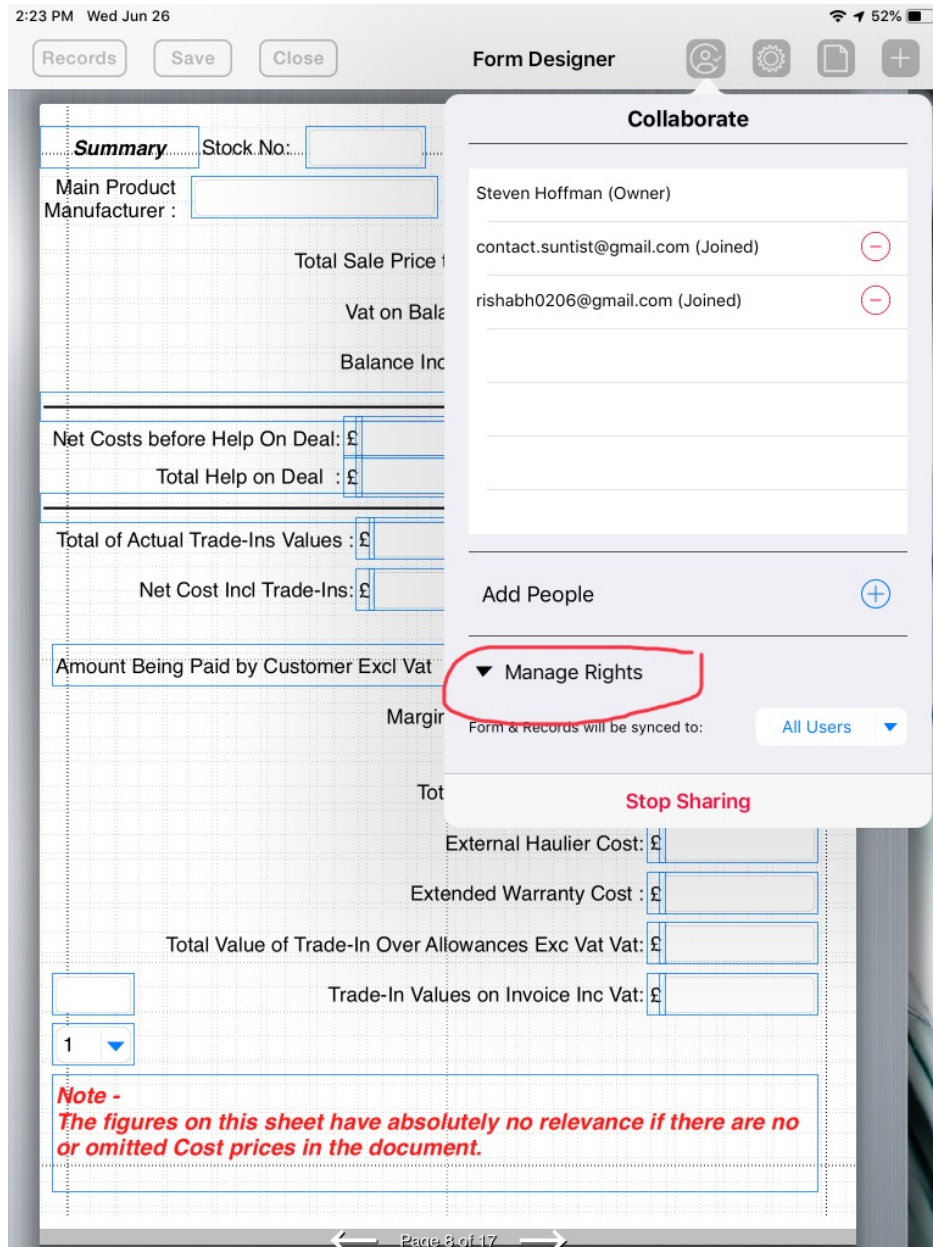
33. Team Collaboration (FormConnect Pro+)

- There are two ways to manage how syncing occurs between users.

  - **Form Owner** - Any changes are synced back to just the form owner.

 - **All Users** - Any changes are synced back to all team members.
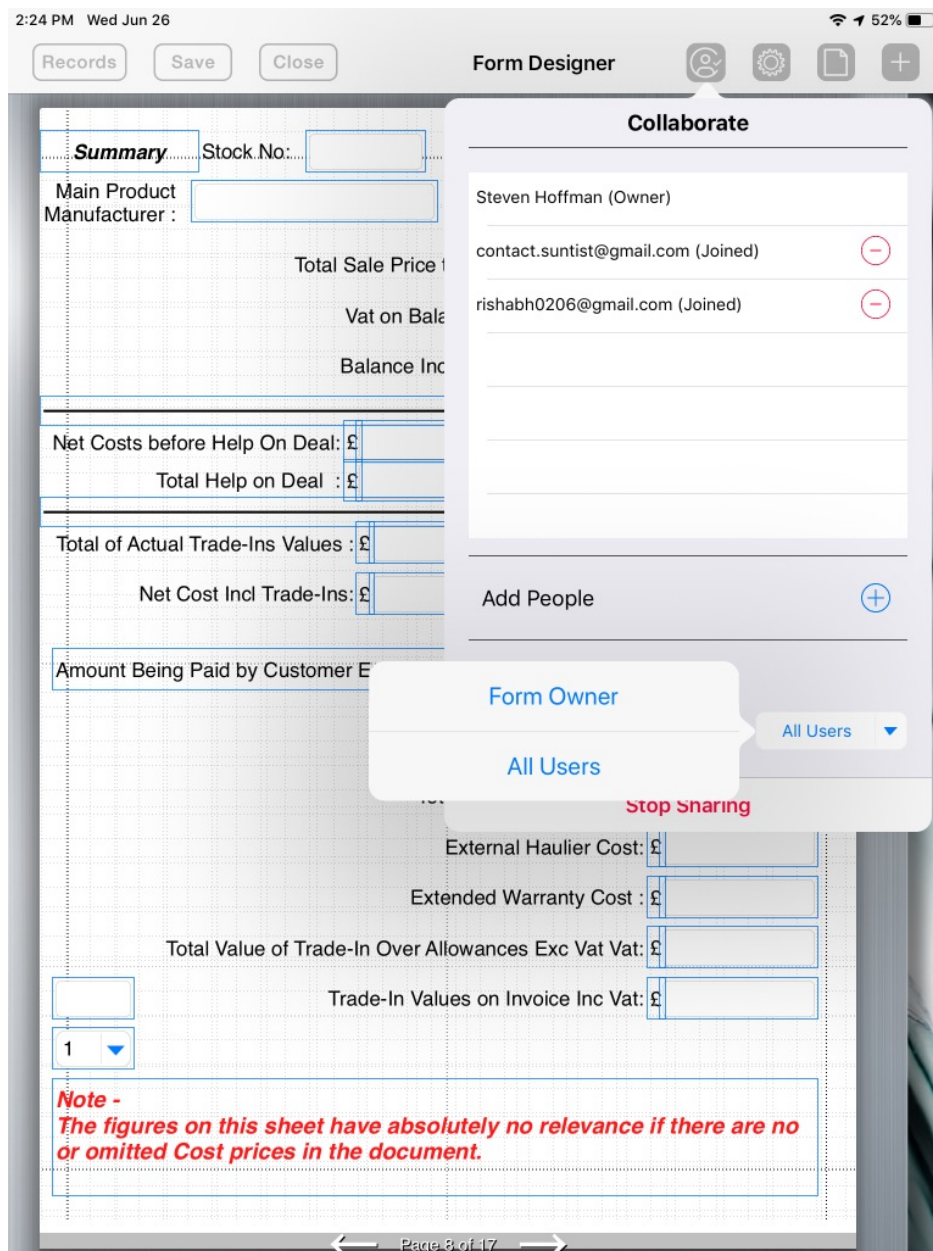
33. Team Collaboration (FormConnect Pro+)

- You can end sharing by tapping on the "Stop Sharing" button.

- You can remove a user from team collaboration by tapping on the red minus (-) button.
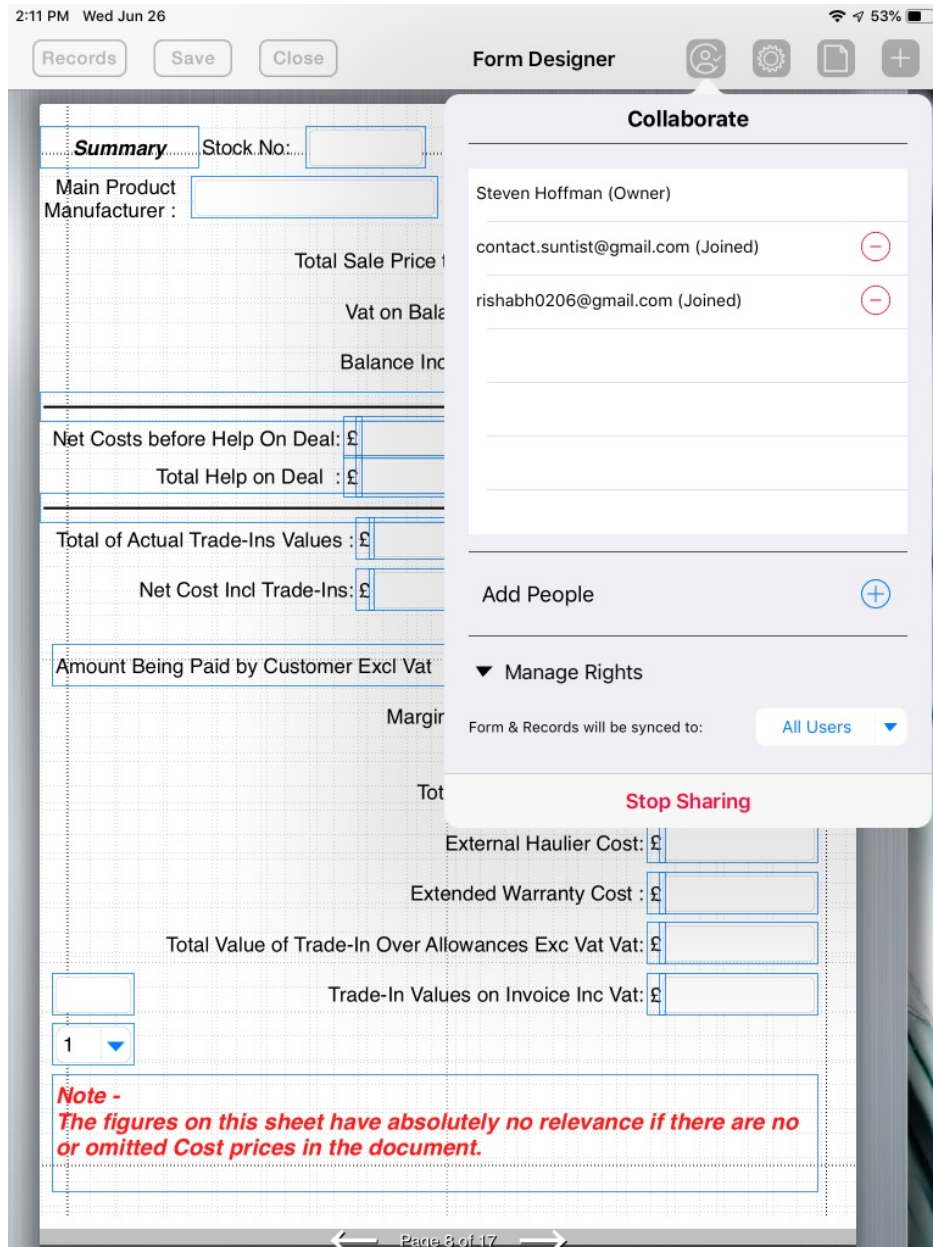
34. Monitoring Cloud Status (FormConnect Pro+)

- If you wish to check the cloud sync status, tap on the cloud icon on the bottom of the home screen. A pop-up screen will display with any syncing activity that is occurring.
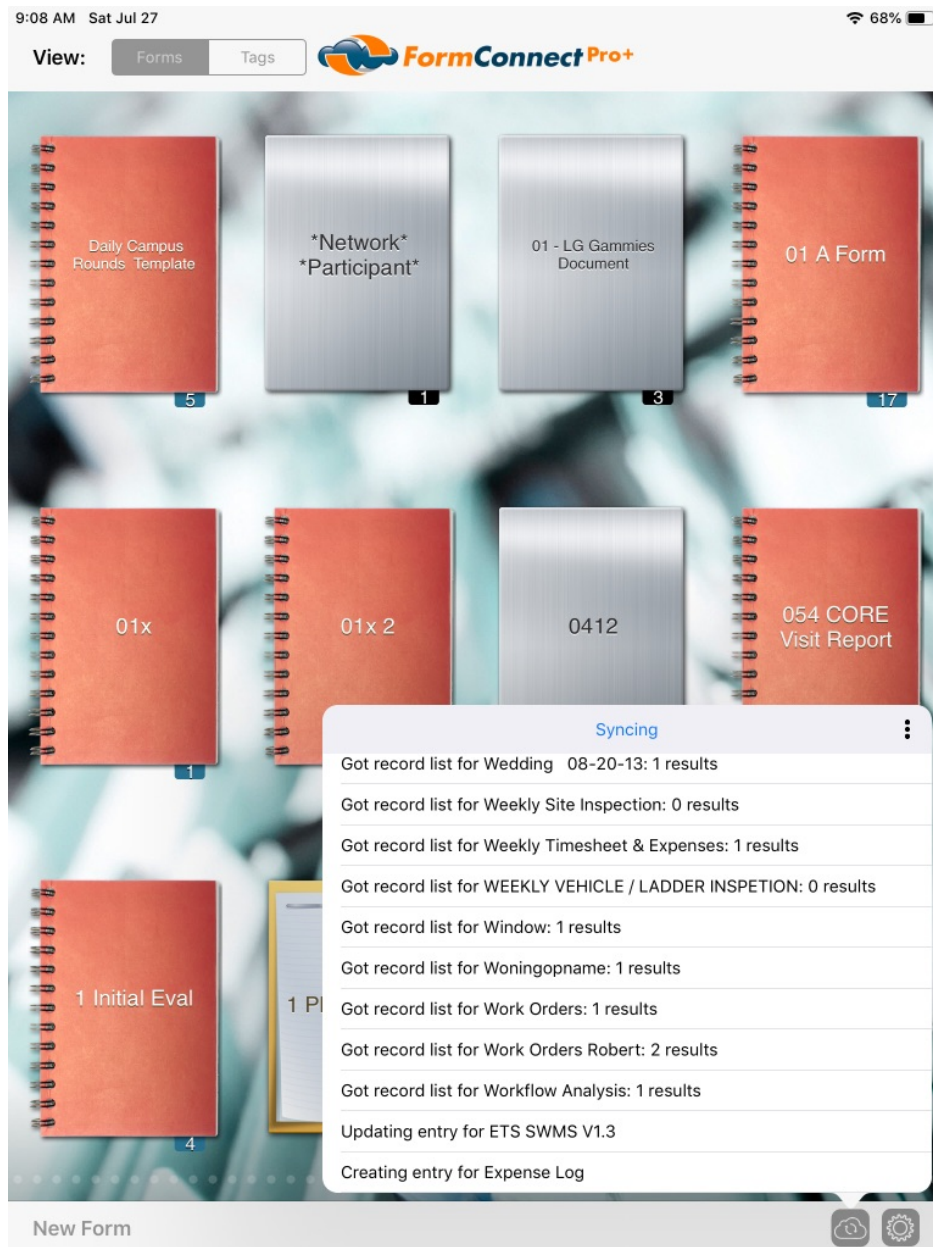
34. Monitoring Cloud Status (FormConnect Pro+)

- When the syncing is completed, a "Synced up to date" message with today's date will appear.

- Syncing is a continuous process. Whenever a change is made to a form on any device, it will automatically sync that change to all other devices.
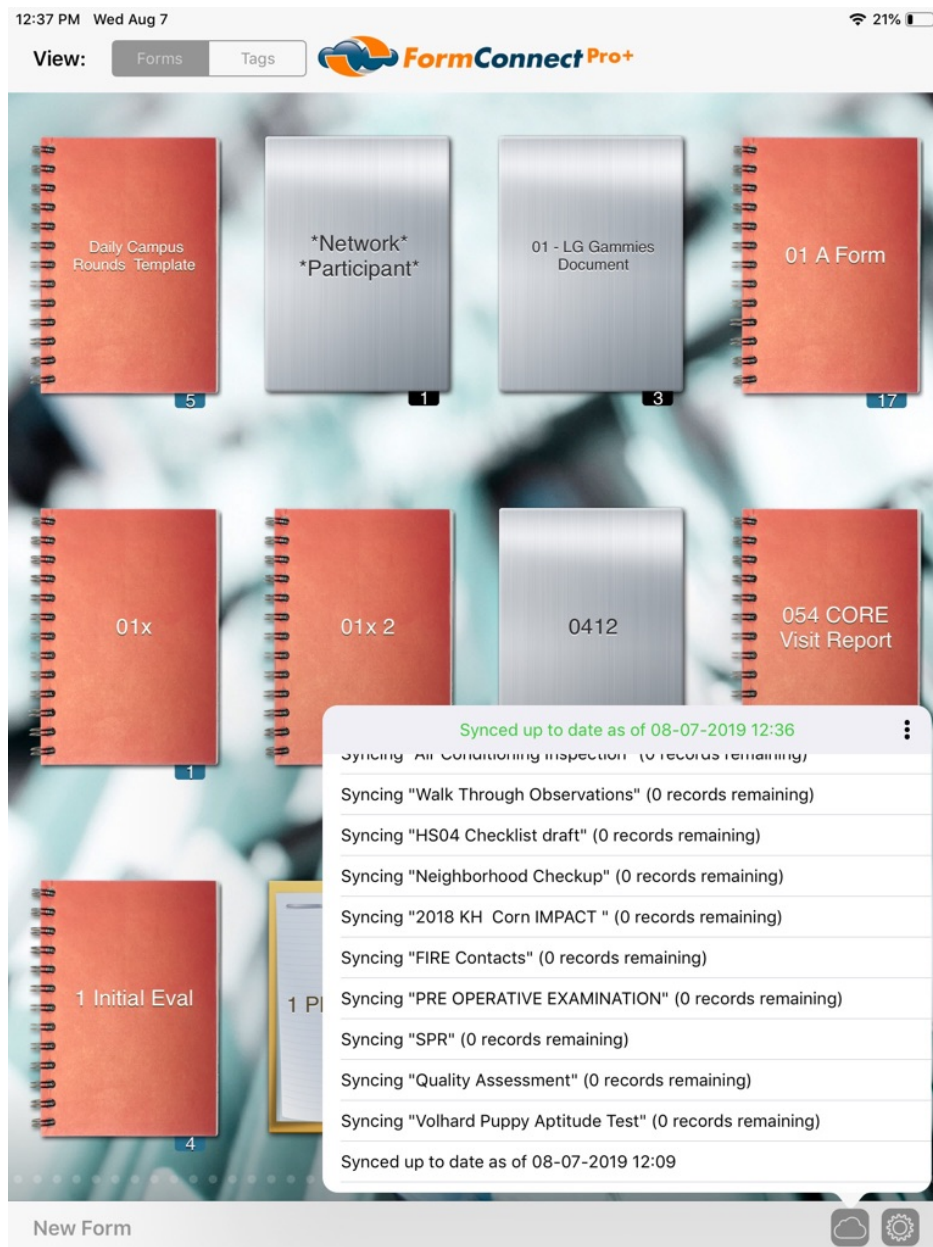
35. Disabling Form Syncing (FormConnect Pro+)

- You can disable form syncing by tapping on the gear icon on the home page and the three vertical dots.
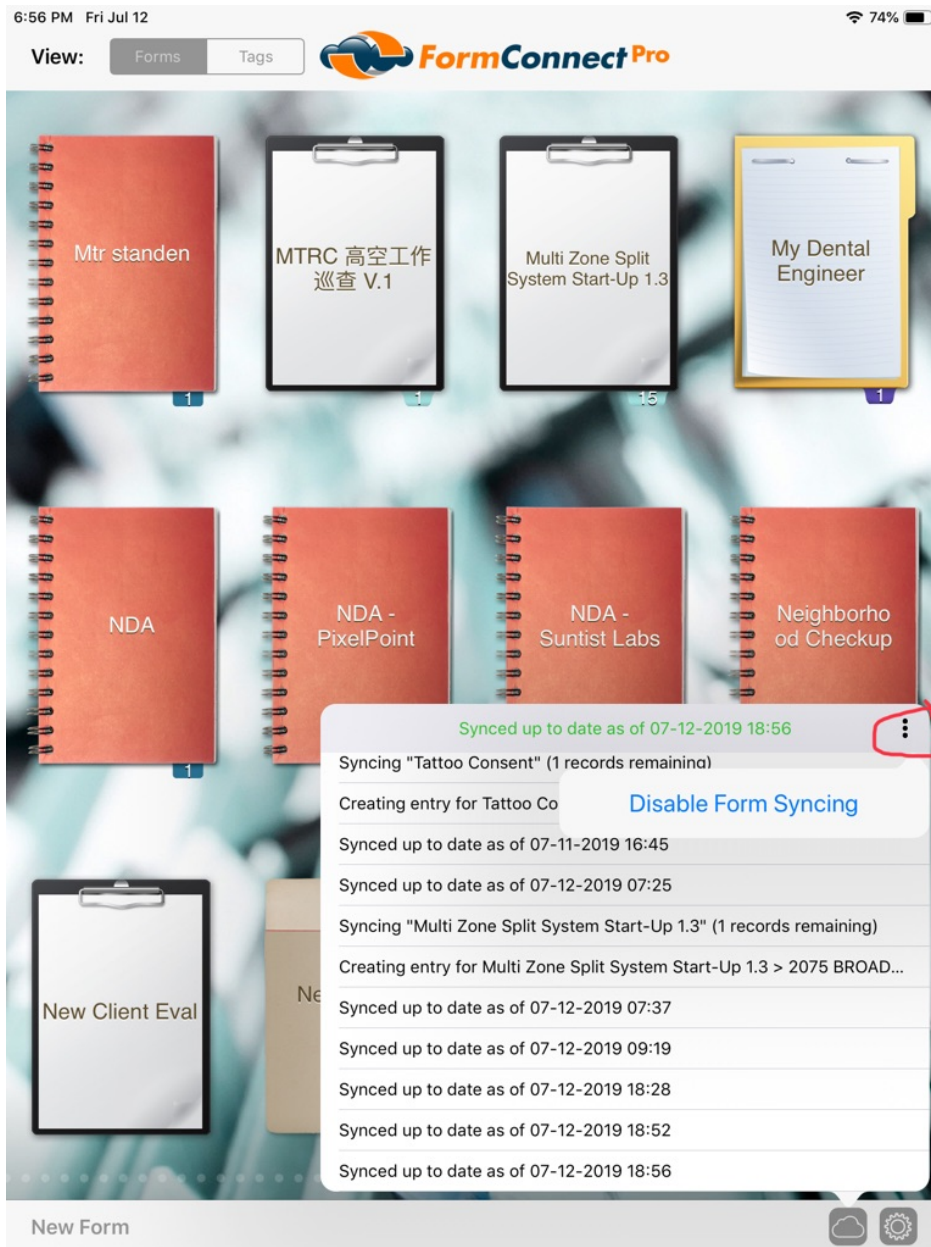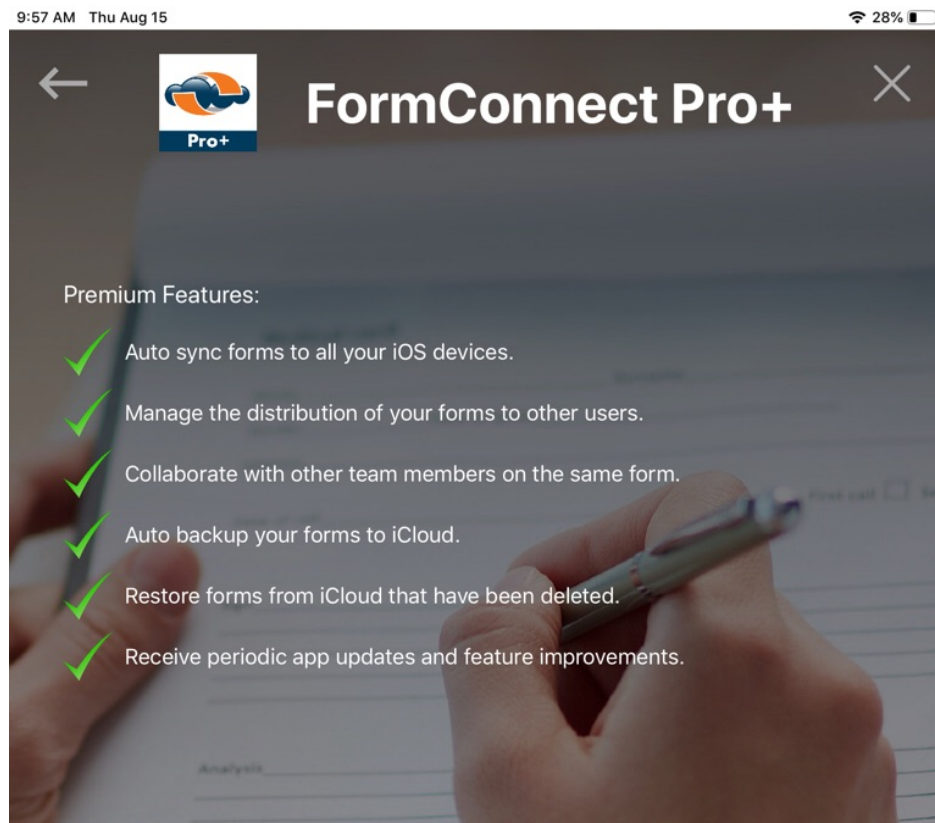
36. Recover Deleted Forms (FormConnect Pro+)

- If you wish to restore files that have been deleted, you can tap on the "Recover Deleted Forms" button.

37. FormConnect Pro+ Features

- FormConnect Pro+ is an optional subscription service. You receive premium feature enhancements on a periodic basis.

- You can subscribe to the FormConnect Pro+ premium features on an annual or monthly basis. Once you subscribe, you have access to all the premium features.When you unsubscribe, these features are disabled.

- If you plan to install FormConnect Pro+ on a second iOS device, tap on the "Restore Purchases" button. You will be prompted for your Apple ID and password to confirm your previous purchase.

38. 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.