



Help Documentation

V3.3

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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.

The screenshot shows a detailed view of a tagged record for 'Jim Smith'. On the left, there's a sidebar with a search bar and a list of folders: 'J', 'Jim Smith Contacts', 'Jim Smith Expense Report', and 'Jim Smith Insurance' (which is highlighted in blue). The main area displays a form with various fields for personal and business information. The fields are: First Name (Jim), Last Name (Smith), Company (ABC Company), Business Address (2345 Main Street), City (Los Angeles), State (CA), Zip (90064), Daytime Phone ((645) 772-8790), Evening Phone ((645) 772-8755), Driver's License (N2645789), State License Held (CA), Social Security # (434-67-8822), Home Address (1900 Holt Ave), City (Los Angeles), State (CA), Zip (90034), Ins. Company (Aetna), Policy Number (5478903), and Claim Number (A324409). On the right side, there's a vertical navigation bar with buttons for 'Show All', 'Contacts', 'Expense', and 'Insurance'.

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”.



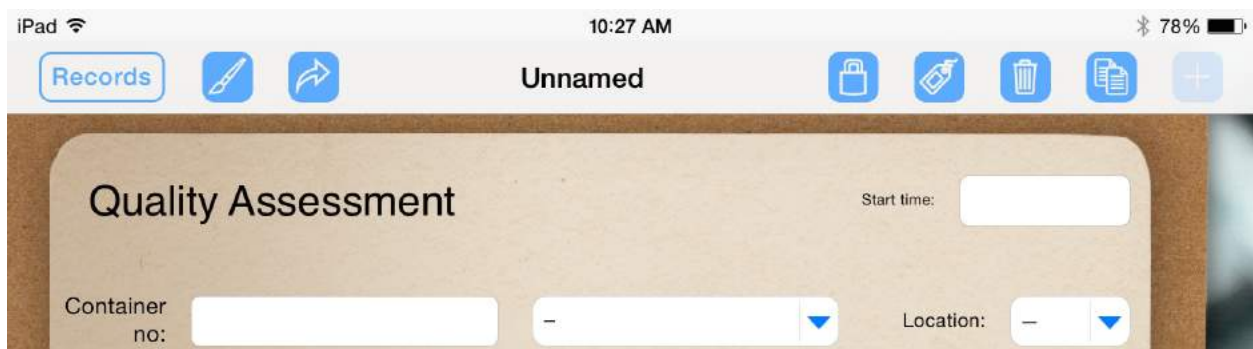
6. Renaming, Cloning and Deleting a Form

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

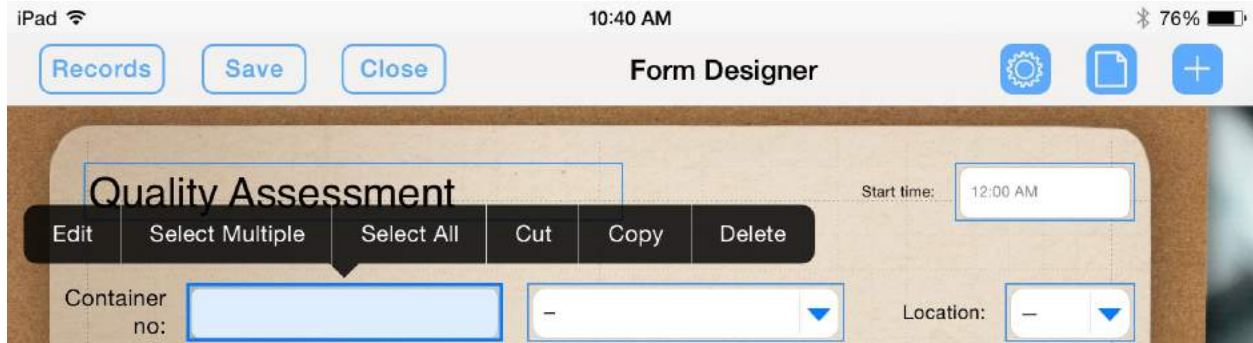


7. Editing a Form

- Tap on the “Paint brush” icon to open the editor.

A screenshot of an iPad screen displaying a "Quality Assessment" form. The top status bar shows "iPad", signal strength, "10:27 AM", and "78%" battery. The app's top navigation bar includes a "Records" button, a paintbrush icon, a share icon, the title "Unnamed", and icons for lock, edit, delete, and add. The form itself has a title "Quality Assessment" and fields for "Start time:", "Container no:", a dropdown menu, and "Location:".

- 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 (+).

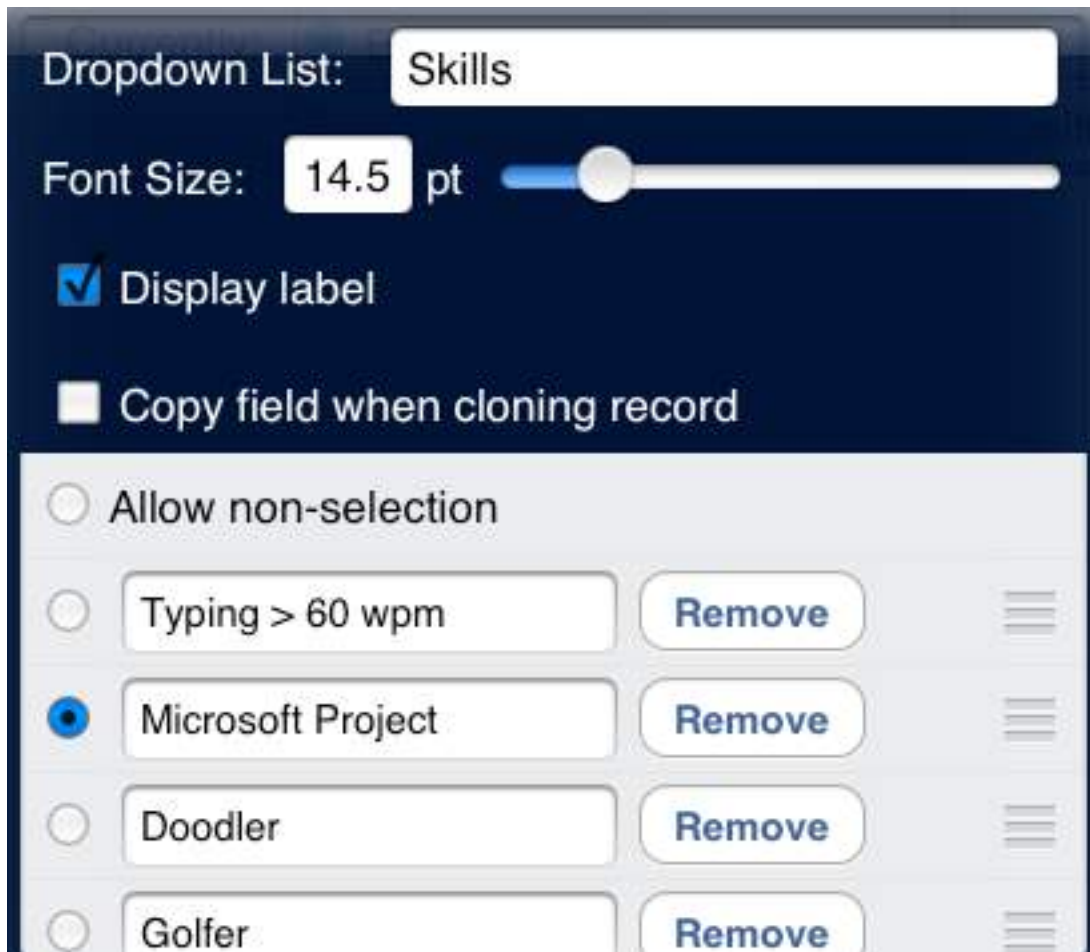
The screenshot displays the 'Form Designer' application window. The title bar includes buttons for 'Records', 'Save', and 'Close', along with icons for editing, saving, and adding fields. The main canvas shows a 'Job Application' form with the following fields:

- Date: January 1, 2010
- Name: [Text Box]
- SSN #: [Text Box]
- Address 1: [Text Box]
- Phone: [Text Box]
- City: [Text Box]
- Desired Salary: [Text Box]
- State: [Text Box]
- Zip: [Text Box]
- Sex: Male (Dropdown)
- Skills: Microsoft Project (Dropdown)
- Email: [Text Box]
- Currently: ☒ Employed ☐ Unemployed
- ☐ U.S. Citizen?
- Briefly Describe The Type Job Or Position You Are Applying For: [Text Area]

The sidebar on the right lists available field types: Text box, Date, Check Box, Dropdown, Radio Buttons, and Label.

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.

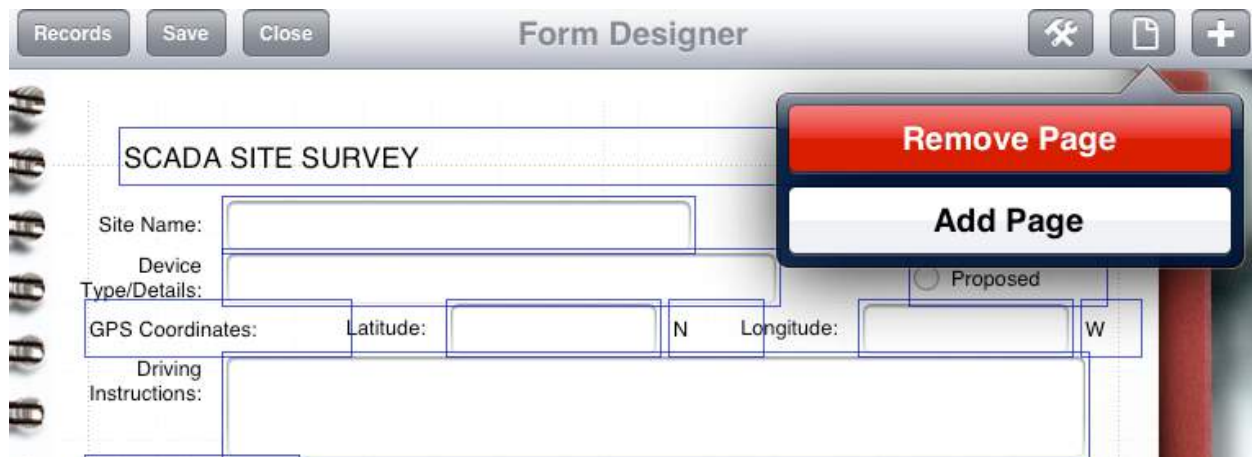


The screenshot shows a configuration window for a 'Dropdown List'. At the top, the title 'Dropdown List:' is followed by a text input field containing the word 'Skills'. Below this, the 'Font Size' is set to '14.5 pt' with a slider control. There are two checkboxes: 'Display label' which is checked, and 'Copy field when cloning record' which is unchecked. A section below contains a radio button for 'Allow non-selection'. Below that is a list of four items, each with a radio button, a text field, a 'Remove' button, and a three-line menu icon. The items are: 'Typing > 60 wpm', 'Microsoft Project' (which is selected), 'Doodler', and 'Golfer'.

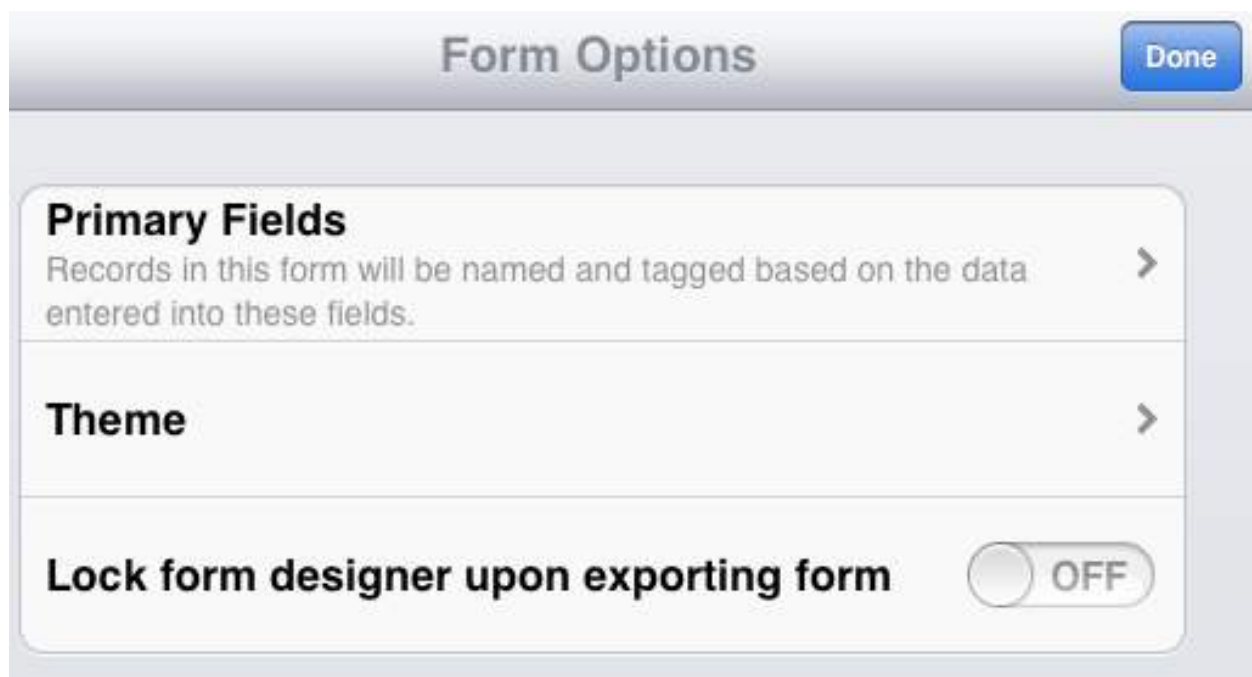
Selection	Item	Action	Menu
<input type="radio"/>	Typing > 60 wpm	Remove	⋮
<input checked="" type="radio"/>	Microsoft Project	Remove	⋮
<input type="radio"/>	Doodler	Remove	⋮
<input type="radio"/>	Golfer	Remove	⋮

10. Adding/Removing Pages

Tap on the  to add or remove a page.



11. Form Settings Options



12. Specifying the Primary Field(s)

- The primary field is where records are named.
- You can assign up to two primary fields.
- Drag the three grey vertical lines associated with the field name up or down to change the primary field.

The screenshot shows a configuration window titled "Primary Fields". At the top left is a "Form Options" button, and at the top right is a "Done" button. The window is divided into two main sections. The first section, "Currently used fields:", contains a list of two fields: "First Name:" and "Last Name:". Each field has three horizontal grey lines to its right, indicating it can be dragged. The second section, "Other fields:", contains a list of five fields: "Driver's License:", "State License Held:", "Social Security #:", "Daytime Phone:", and "Evening Phone:". Each of these fields also has three horizontal grey lines to its right. A instruction text "Drag fields up to use them for record names." is positioned between the two sections.

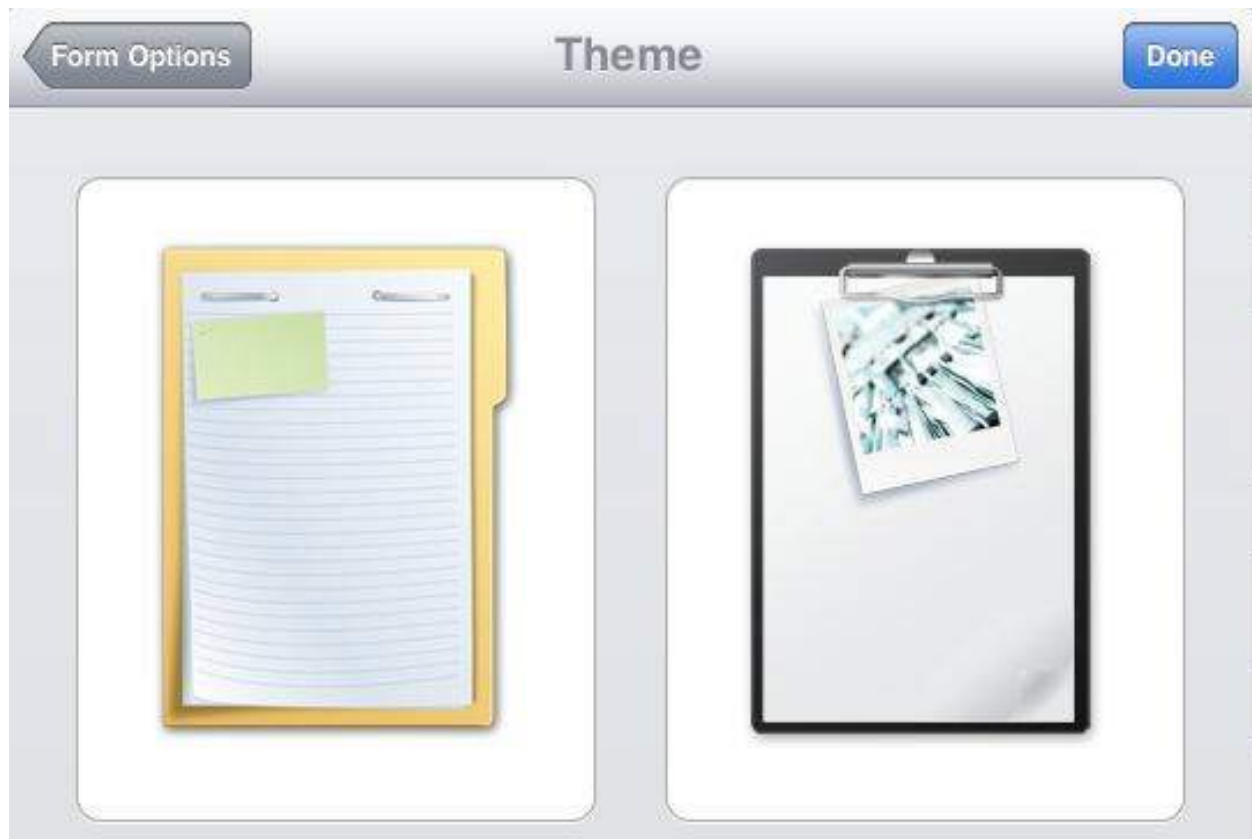
Currently used fields:	
First Name:	≡
Last Name:	≡

Drag fields up to use them for record names.

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

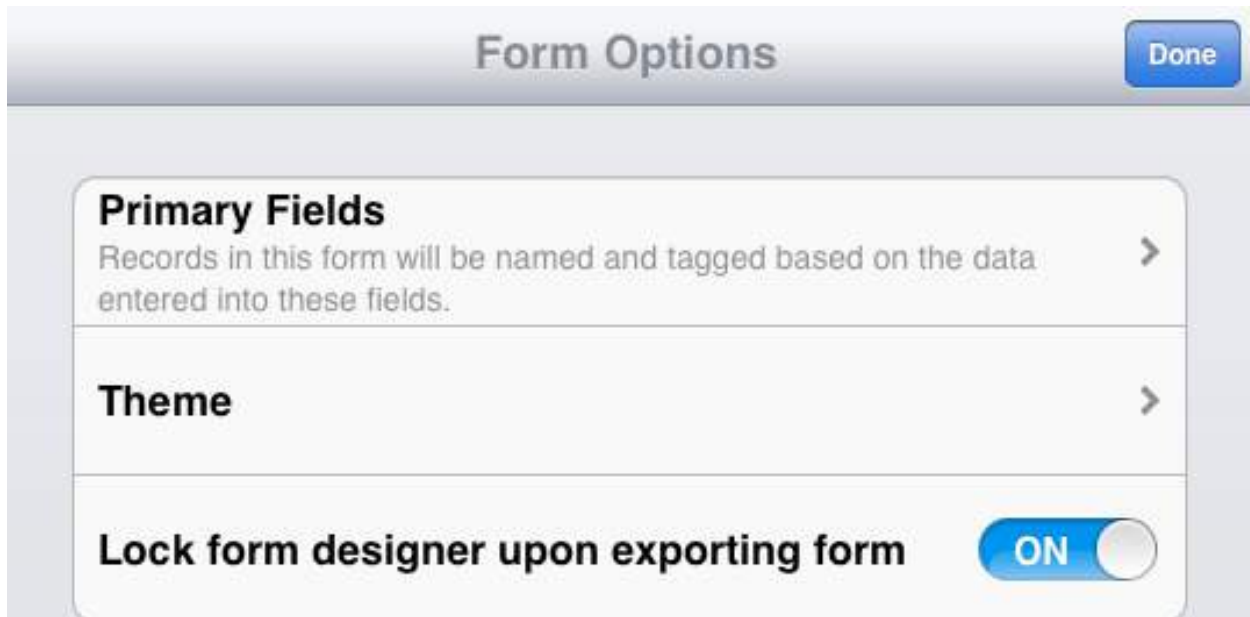
13. Adding a Template Theme

- 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.










The image shows a 'Form Options' dialog box with a 'Done' button in the top right corner. The dialog contains three sections: 'Primary Fields' with a description and a right arrow, 'Theme' with a right arrow, and 'Lock form designer upon exporting form' with a toggle switch set to 'ON'.

Form Options	
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	<input checked="" type="checkbox"/> ON

15. Viewing Records

- Records are displayed on the left frame based on the primary field settings.
- Records automatically display when holding the iPad in landscape. When holding the iPad in portrait, there is a “[Records](#)” button that you tap.

iPad 11:36 AM 13%

< AMRRI LPO Template   B-34 CONVEYOR     

Export Print Delete

All Records Form Only

B

B-34 CONVEYOR	✓	A
B-34 DETECTOR	✓	C
B-34 GEAR REDUCER		E
B-34 MAGNET		G
B-34 Moisture Analyser		I
B-34 MOTOR		K
B-34 PULLEY		M
B-34 PULLEY		P
B-34 PULLEY		R
B-34 PULLEY		T
B-34 PULLEY		V
B-34 ROLLER		X
B-44 CONVEYOR		Z

Customer/Site

Area: 3A Washer Survey Unit ID: B-34 Pic:

Equipment Name: Conveyor, Long Chip Belt Criticality:

Component Information Component Picture:

Component Name: CONVEYOR Type: Serial: 9238

Component Location: LONG CHIP BELT Manufacturer: Model:

Power: RPM: Orientation:

Lubricants

Lubricant: Quantity:

Viscosity Grade: Oil Volume:

Greased Component Attributes

Bearing Location: Bearing #: Bearing OD:

Size Source: Bearing Width:

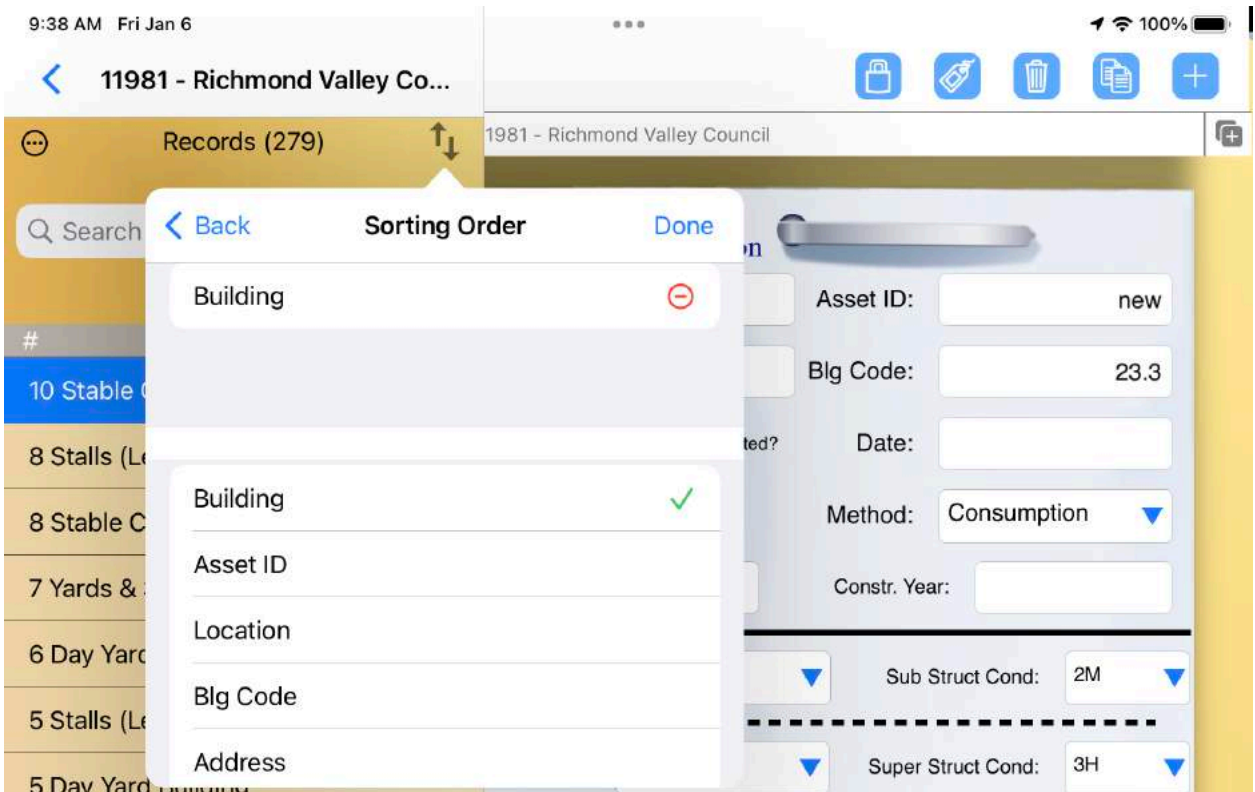
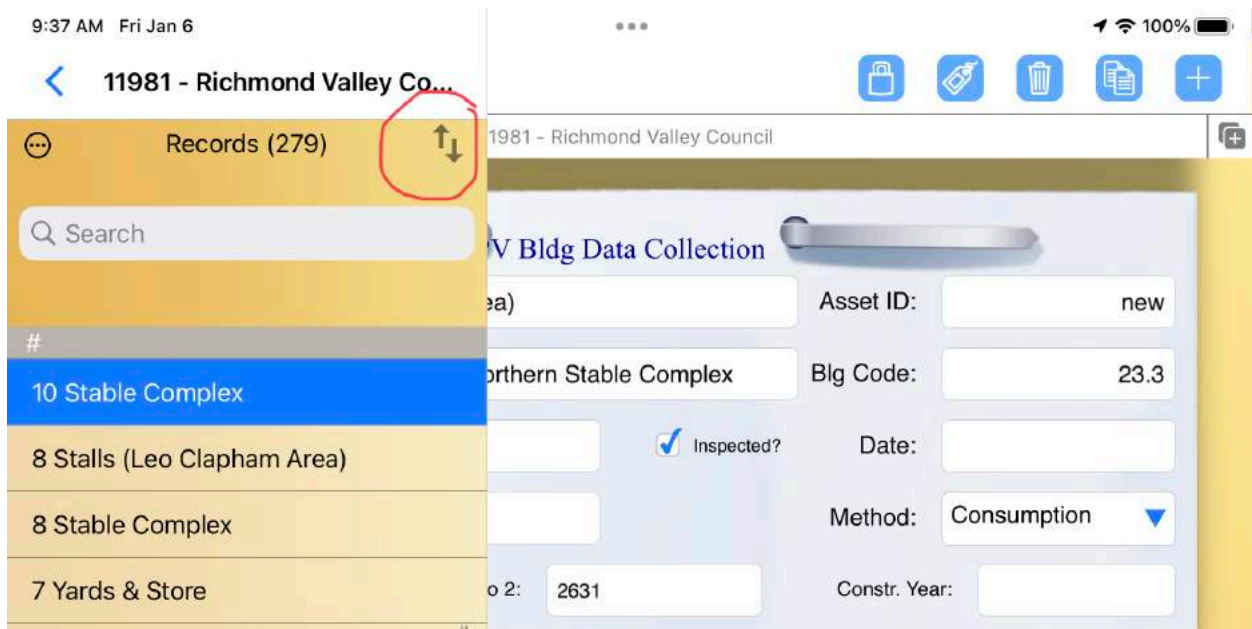
Shaft Diameter:

Housing Temp	Bearing Type	Moisture	Solid Contamination	Vibration
<input type="radio"/> < 150 F	<input type="radio"/> Ball	<input type="radio"/> <80%	<input type="radio"/> Light, Non-Abrasive	<input type="radio"/> < .2 ips velocity, peak
<input type="radio"/> 150 - 175 F	<input type="radio"/> Cylindrical or Needle Roller	<input type="radio"/> 80-90%	<input type="radio"/> Heavy, Non-Abrasive	<input type="radio"/> 0.2 - 0.4 ips
<input type="radio"/> 175 - 200 F	<input type="radio"/> Tapered roller	<input type="radio"/> Occasional condensation	<input type="radio"/> Light, Abrasive	<input type="radio"/> > 0.4 ips

Page 1 of 2

16. Sorting Records (FormConnect Pro+)

- Records can be sorted by any field on the form.
- You can also sort your records in ascending or descending order.



17. Adding a Record

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

18. Cloning a Record

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

19. Deleting a Record

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



A screenshot of a settings menu for a text field. The menu has a dark blue background with white text. It includes a 'Text Field:' label followed by a text input box containing 'Container no'. Below this is a 'Font Size:' label followed by a numeric input box showing '12.0' and the unit 'pt', and a horizontal slider bar. At the bottom, there are two checked checkboxes: 'Display label' and 'Copy field when cloning record'. The word 'Text' is visible on the right side of the menu.

20. 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.

21. Exporting a Record/Form

- Tap on the Share (Arrow) button on the menu bar.
- Select the record(s) or the Form template.
- Select “Export”.

iPad 11:36 AM 13%

AMRRI LPO Template

Export Print Delete

All Records Form Only

B

B-34 CONVEYOR ✓ A

B-34 DETECTOR ✓ C

B-34 GEAR REDUCER E

B-34 MAGNET G

B-34 Moisture Analyser I

B-34 MOTOR K

B-34 PULLEY M

B-34 PULLEY P

B-34 PULLEY R

B-34 PULLEY T

B-34 PULLEY V

B-34 ROLLER X

B-44 CONVEYOR Z

B-34 CONVEYOR

Customer/Site

Area: 3A Washer Survey Unit ID: B-34 Pic:

Equipment Name: Conveyor, Long Chip Belt Criticality:

Component Information

Component Name: CONVEYOR Type: — Serial: 9238

Component Location: LONG CHIP BELT Manufacturer: Model:

Power: — RPM: Orientation: —

Lubricants

Lubricant: — Quantity:

Viscosity Grade: — Oil Volume: —

Greased Component Attributes

Bearing Location: — Bearing #: Bearing OD: —

Size Source: — Bearing Width: —

Shaft Diameter: —

Housing Temp	Bearing Type	Moisture	Solid Contamination	Vibration
<input type="radio"/> < 150 F	<input type="radio"/> Ball	<input type="radio"/> <80%	<input type="radio"/> Light, Non-Abrasive	<input type="radio"/> < .2 ips velocity, peak
<input type="radio"/> 150 - 175 F	<input type="radio"/> Cylindrical or Needle Roller	<input type="radio"/> 80-90%	<input type="radio"/> Heavy, Non-Abrasive	<input type="radio"/> 0.2 - 0.4 ips
<input type="radio"/> 175 - 200 F	<input type="radio"/> Tapered roller	<input type="radio"/> Occasional condensation	<input type="radio"/> Light, Abrasive	<input type="radio"/> > 0.4 ips

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

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< AMRRI LPO Template B-34 CONVEYOR

Export Record

File Formats:

☒ FMC ☐ PDF ☐ CSV
☐ XML ☐ HTML

Email
Dropbox
Box
Google Drive
Open In...
Cancel

Customer/Site

Area: 3A Washer Survey Unit ID: B-34 Pic:
Equipment Name: Conveyor, Long Chip Belt Criticality:

Component Information

Component Name: CONVEYOR Type: Serial: 9238
Component Location: LONG CHIP BELT Manufacturer: Model:
Power: RPM: Orientation:

Lubricants

Lubricant: Quantity:
Viscosity Grade: Oil Volume:

Greased Component Attributes

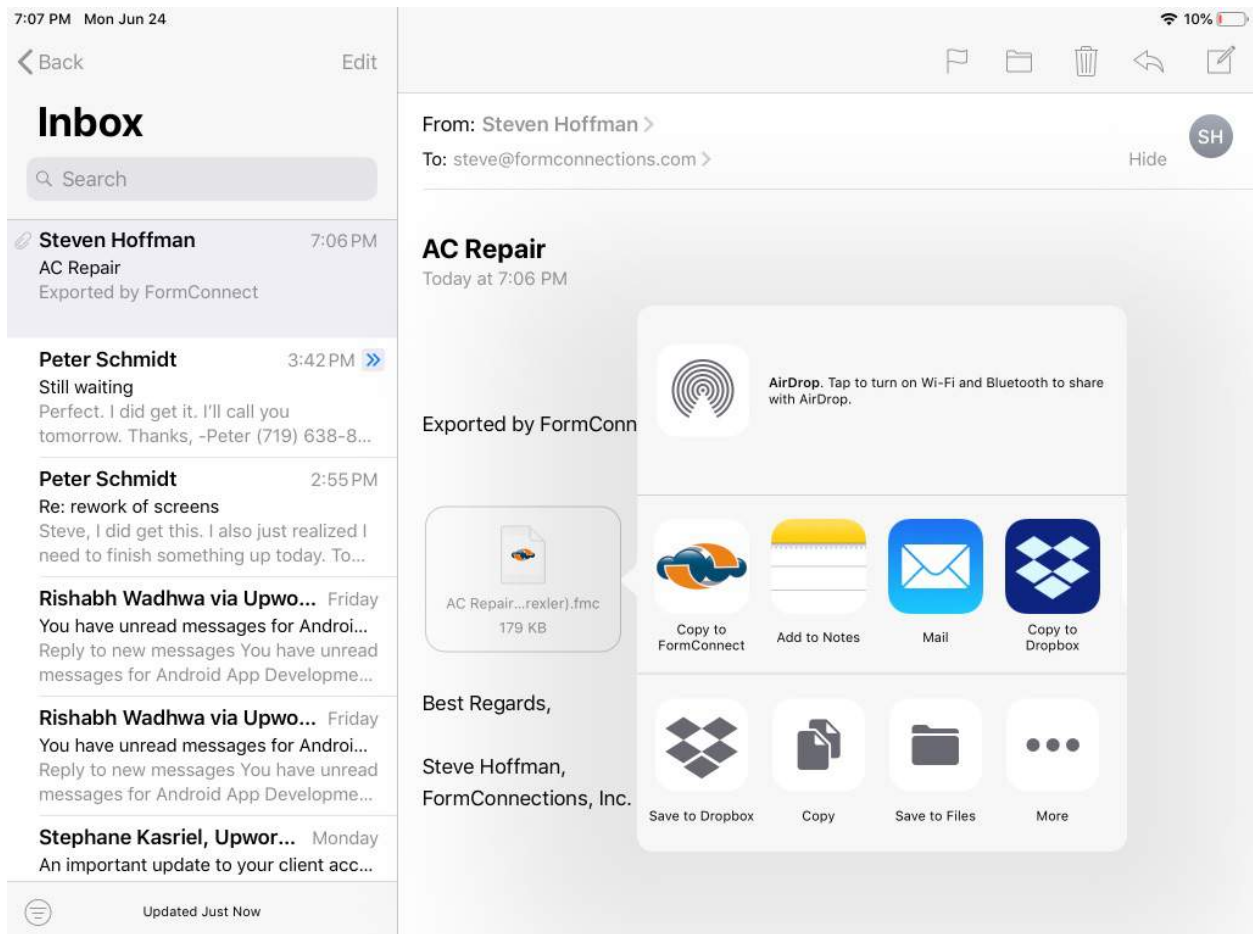
Bearing Location: Bearing #: Bearing OD:
Size Source: Bearing Width: Shaft Diameter:

Housing Temp	Bearing Type	Moisture	Solid Contamination	Vibration
<input checked="" type="radio"/> < 150 F	<input type="radio"/> Ball	<input type="radio"/> <80%	<input type="radio"/> Light, Non-Abrasive	<input checked="" type="radio"/> < .2 ips velocity, peak
<input type="radio"/> 150 - 175 F	<input checked="" type="radio"/> Cylindrical or Needle Roller	<input type="radio"/> 80-90%	<input checked="" type="radio"/> Heavy, Non-Abrasive	<input type="radio"/> 0.2 - 0.4 ips
<input type="radio"/> 175 - 200 F	<input type="radio"/> Tapered Roller	<input checked="" type="radio"/> Occasional condensation	<input type="radio"/> Light, Abrasive	<input type="radio"/> > 0.4 ips

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

22. Importing a Record/Form

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



23. Print Function

- Tap on the Share (Arrow) button on the menu bar.
- Make sure the record is ticked and choose the “Print” button.

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AMRRI LPO Template B-34 CONVEYOR

Export Print Delete

All Records Form Only

B

B-34 CONVEYOR ✓

B-34 DETECTOR

B-34 GEAR REDUCER

B-34 MAGNET

B-34 Moisture Analyser

B-34 MOTOR

B-34 PULLEY

B-34 PULLEY

B-34 PULLEY

B-34 PULLEY

B-34 PULLEY

B-34 ROLLER

B-44 CONVEYOR

Customer/Site

Area: 3A Washer Survey Unit ID: B-34 Pic:

Equipment Name: Conveyor, Long Chip Belt Criticality:

Component Information

Component Name: CONVEYOR Type: Serial: 9238

Component Location: LONG CHIP BELT Manufacturer: Model:

Power: RPM: Orientation:

Lubricants

Lubricant: Quantity:

Viscosity Grade: Oil Volume:

Greased Component Attributes

Bearing Location: Bearing #: Bearing OD:

Size Source: Bearing Width: Shaft Diameter:

Housing Temp	Bearing Type	Moisture	Solid Contamination	Vibration
<input type="radio"/> < 150 F	<input type="radio"/> Ball	<input type="radio"/> <80%	<input type="radio"/> Light, Non-Abrasive	<input type="radio"/> < .2 ips velocity, peak
<input type="radio"/> 150 - 175 F	<input type="radio"/> Cylindrical or Needle Roller	<input type="radio"/> 80-90%	<input type="radio"/> Heavy, Non-Abrasive	<input type="radio"/> 0.2 - 0.4 ips
<input type="radio"/> 175 - 200 F	<input type="radio"/> Tapered roller	<input type="radio"/> Occasional condensation	<input type="radio"/> Light, Abrasive	<input type="radio"/> > 0.4 ips

- Select the appropriate printer, the page range and the number of copies.

iPad 12:16 PM 28%

< AMRRI LPO Template B-34 CONVEYOR

Export Print Delete

Printer Options

Printer Epson Stylus NX430 >

Range All Pages >

1 Copy - +

Print

Customer/Site

Area: 3A Washer Survey Unit ID: B-34 Pic:

Component: Conveyor, Long Chip Belt Criticality:

Component Information

Component Picture:

Component Name: CONVEYOR Type: Serial: 9238

Component Location: LONG CHIP BELT Manufacturer: Model:

RPM: Orientation:

Lubricants

Lubricant: Quantity:

Viscosity: Oil Volume:

Greased Component Attributes

Bearing Location: Bearing #: Bearing OD:

Size Source: Bearing Width:

Shaft Diameter:

Housing Temp	Bearing Type	Moisture	Solid Contamination	Vibration
<input type="radio"/> < 150 F	<input type="radio"/> Ball	<input type="radio"/> <80%	<input type="radio"/> Light, Non-Abrasive	<input type="radio"/> < .2 ips velocity, peak
<input type="radio"/> 150 - 175 F	<input type="radio"/> Cylindrical or Needle Roller	<input type="radio"/> 80-90%	<input type="radio"/> Heavy, Non-Abrasive	<input type="radio"/> 0.2 - 0.4 ips
<input type="radio"/> 175 - 200 F	<input type="radio"/> Tapered Roller	<input type="radio"/> Occasional condensation	<input type="radio"/> Light, Abrasive	<input type="radio"/> > 0.4 ips

B-34 PULLEY P

B-34 PULLEY R

B-34 PULLEY T

B-34 PULLEY V

B-34 ROLLER X

B-44 CONVEYOR Z

- Note: To view a list of Air Print supported printers, click on the following: <https://support.apple.com/en-us/HT201311>

24. Field Calculations (FormConnect Pro)

- FormConnect Pro includes a field type setting (Calculation) that you can choose when creating a new text or date field.



The image shows a dialog box for configuring a text field. At the top, the 'Text Field' label is followed by a text input containing 'Total'. Below this, the 'Font Size' is set to '14.5 pt' with a slider. The 'Alignment' section has three buttons: 'Left' (selected), 'Center', and 'Right'. A checked checkbox labeled 'Display label' is present, with a tip: 'Tip: You can resize the text field to allow for multiple lines of text.' Below the checkbox is a 'Formula' text input. At the bottom, a list of field types is shown: 'Email Address', 'Auto-increment number', and 'Calculation' (which is highlighted with a blue background).

- A formula can be entered into a field to calculate the value between two or more fields.
- Formulas require the following computational symbols (+ - * /).



The image shows the same dialog box as above, but with the 'Calculation' field type selected. The 'Display label' checkbox is now unchecked. The 'Formula' text input now contains the formula 'A15+A19+A23+A27+A28'. The 'Alignment' buttons are still 'Left', 'Center', and 'Right', with 'Center' now being the selected button.

- 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

25. 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.

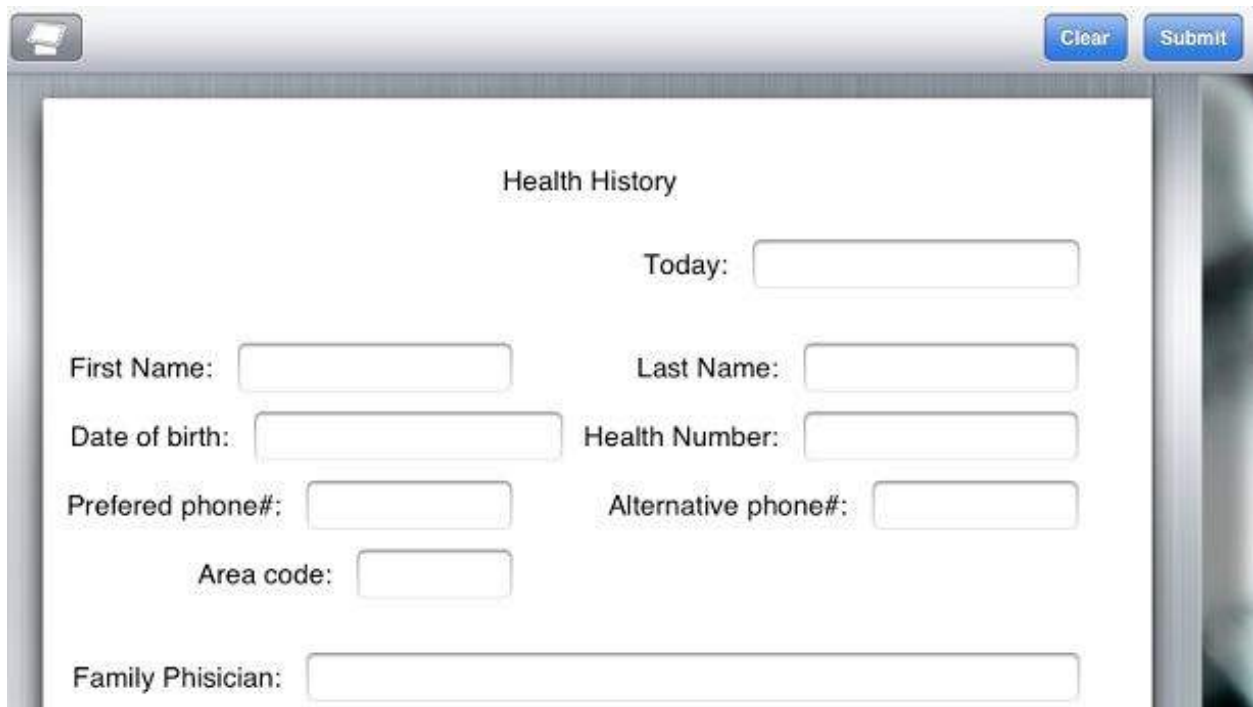


The screenshot shows a mobile application interface. On the left is a sidebar with a list of records under the heading "Records (6)". The records are: Bosco Weiner, Donald Duck (with a lock icon), Huck Finn, Jim Beam (with a lock icon), John Doe, and Tom Sawyer. On the right is a form titled "Health History" for "Bosco Weiner". The form includes fields for "Today:" (April 27, 2013), "First Name:" (Bosco), "Last Name:" (Weiner), "Date of birth:" (February 26, 1996), "Health Number:", "Preferred phone#:", "Area code:", "Alternative phone#:", "Family Physician:", and "Third Party responsible for payment:" (No).

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

26. 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.



The screenshot shows a web application window in kiosk mode. The title bar is grey and contains a small icon on the left and two buttons, 'Clear' and 'Submit', on the right. The main content area is white and titled 'Health History'. It contains several text input fields for user information: 'Today:', 'First Name:', 'Last Name:', 'Date of birth:', 'Health Number:', 'Preferred phone#:', 'Alternative phone#:', 'Area code:', and 'Family Phisician:'. The 'Family Phisician' field is a single line, while the others are arranged in two columns.

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



The image shows a 'Form Settings' dialog box with a 'Done' button in the top right corner. The settings are organized into sections: 'Primary Fields' with a description and a chevron; 'Theme' with a chevron; 'Enable text boxes when exporting to PDF' with a toggle switch set to 'ON'; 'Embed images as data for CSV and XML' with a toggle switch set to 'ON'; 'Locale' with a dropdown menu showing 'English (United States)' and a chevron; 'Default font size' with a numeric input '14.5' and a slider; 'Lock form designer upon exporting form' with a toggle switch set to 'OFF'; and 'Enable kiosk mode' with a description and a toggle switch set to 'ON'.

Form Settings Done

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

Theme >

Enable text boxes when exporting to PDF ON


Embed images as data for CSV and XML ON

Locale >
English (United States)

Default font size 14.5

Lock form designer upon exporting form OFF

Enable kiosk mode
An icon will appear in the toolbar. When activated, all features other than filling out records are password-locked. ON

- Kiosk mode () requires a password to invoke and exit this mode.
- Kiosk mode will work on the iPad in both portrait and landscape but works best in portrait mode.



The image shows a screenshot of a kiosk application interface. At the top left is a small icon of a document with a lock. At the top right are two buttons labeled 'Clear' and 'Submit'. The main content area is titled 'Health History' and contains several input fields: 'Today:', 'First Name:', 'Last Name:', 'Date of birth:', 'Health Number:', 'Preferred phone#:', 'Area code:', and 'Family Phisician:'. A modal dialog box is overlaid in the center, titled 'Enter password', with a text input field and two buttons labeled 'Cancel' and 'OK'.

27. 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.

T-Mobile 11:42 AM

< Records

Land Cover: ☒ Evergreen ☐ Dry dipterocarp ☐ Mixed

☐ Bamboo ☐ Urban/village ☐ Paddy field

☐ Old fallow ☐ New fallow ☐ Pine ☐ Agforestry

☐ 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:

33° 32' 15" -117° 41' 23"

Page 1 of 3

+

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

●○○○○ T-Mobile 11:44 AM

Field name: Lat/Lon

Font Size: 14.5 pt

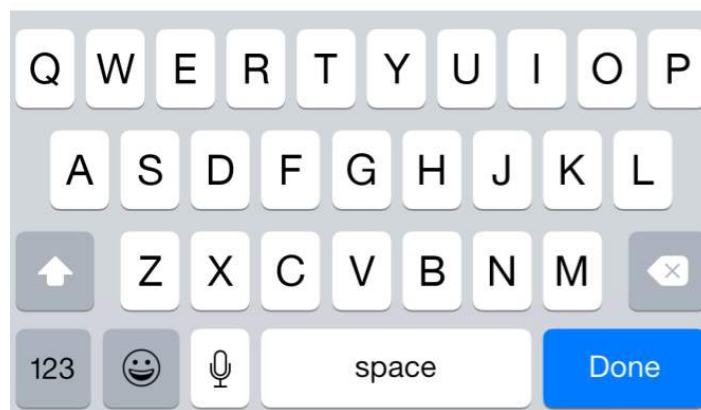
☒ Display label

☐ Required field

Decimal Degrees

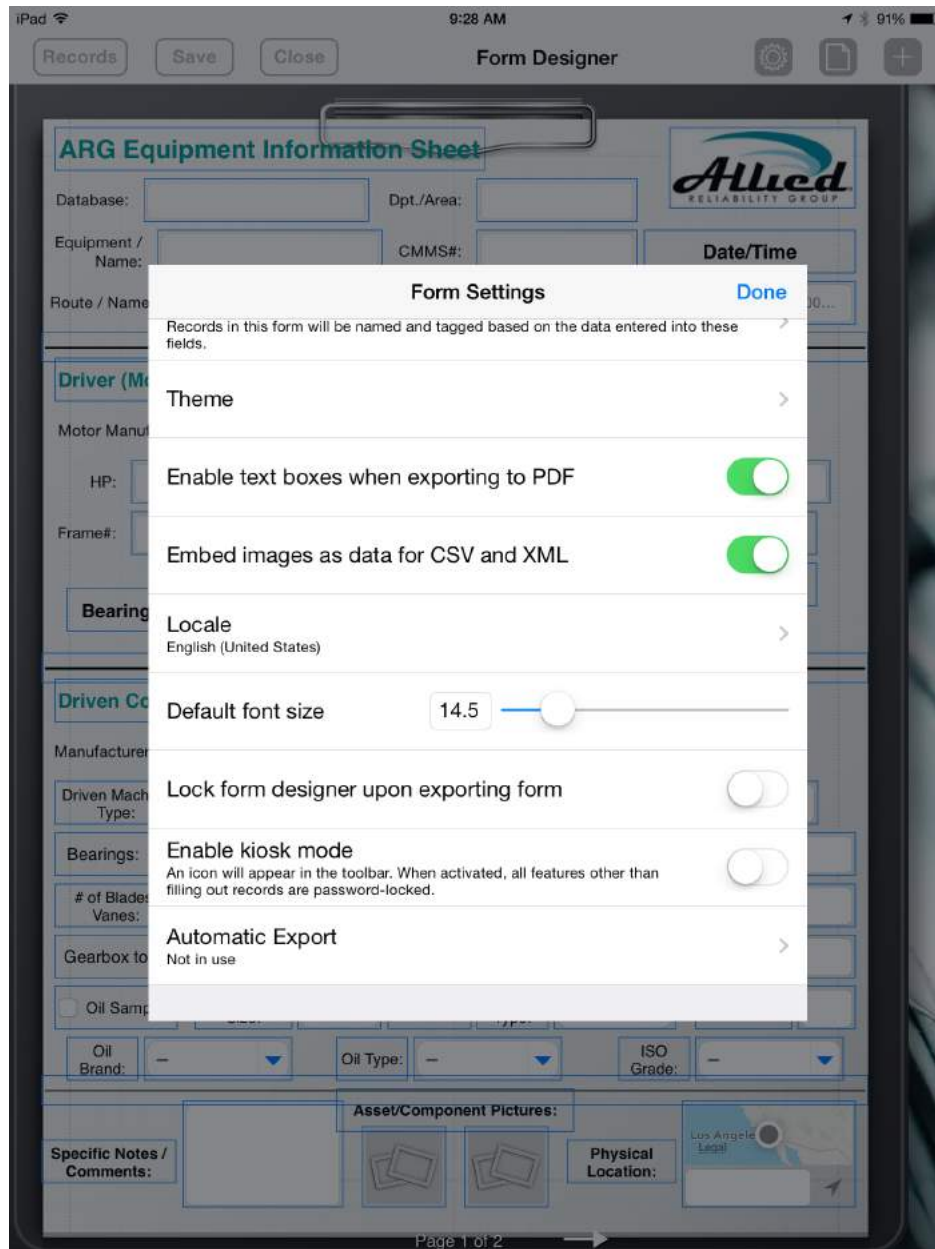
Degrees, minutes, seconds

Degrees, decimal minutes



28. 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 screenshot shows the 'Form Designer' interface on an iPad. The background form is titled 'ARG Equipment Information Sheet' and includes fields for Database, Dpt./Area, Equipment Name, CMMS#, Date/Time, Route, Motor Manufacturer, HP, Frame#, Bearing, Driven Component, Manufacturer, Driven Machine Type, Bearings, # of Blades/Vanes, Gearbox, Oil Sample, Oil Brand, Oil Type, ISO Grade, Asset/Component Pictures, Physical Location, and Specific Notes/Comments. The 'Form Designer' title bar at the top includes 'Records', 'Save', and 'Close' buttons, along with a settings icon, a document icon, and a plus icon. The status bar at the top shows 'iPad', signal strength, '9:31 AM', and '90%' battery.

The 'Form Settings' dialog box is open, titled 'Auto Export'. It has a 'Done' button in the top right corner. The settings are as follows:

- When exporting records from this form, automatically use:** (None) | **Email** | Dropbox
- File format:** FMC | **PDF** | CSV | XML | HTML
- Default subject:** Inspection Report.
- Default message:** Please review the attached report.
- Default recipients:** (enter one address per line)
support@formconnections.com
sales@formconnections.com

At the bottom of the dialog box, there is a section for 'Asset/Component Pictures' with two image icons and a 'Physical Location' field with a map icon showing 'Los Angeles, CA'.

- The export process begins when you tap on the arrow icon , select the record(s) and tap the export button.

iPad 10:46 AM 88%

Burglar Alarm Short Ter... John Doe

Export Print Delete

All Records Form Only

J

John Doe ✓

A

C

E

G

I

K

M

P

R

T

V

X

Z

Protected by: **Eastern Technologies Inc.** 24hr Monitoring Lic#5384 24hr Service (401) 943-9393

BURGLAR ALARM MONITORING AGREEMENT

Date: March 13, 2014

Person req Service: Jane Doe

Name: John Doe Contact Tel: (312) 333-3333

Address: 2400 Main St. Email: John@gmail.com

City: Gotham City Account#: A12345 Key#: 55443

State: NY Zip: 10003

Tel:

Serial#:

Installation location:

City: State: Zip: Panel:

Location is: Occupied ☒ Electricity present ☐ Copper Present

☒ Boiler Present ☐ Boiler Brand New ☐ Site is boarded up

CONTACT LIST Lockbox#: 4568

First: Tel: Pass:

Page 1 of 6

29. Photo Annotation


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



30. 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:

Font Size: pt 

Alignment: Left Center Right

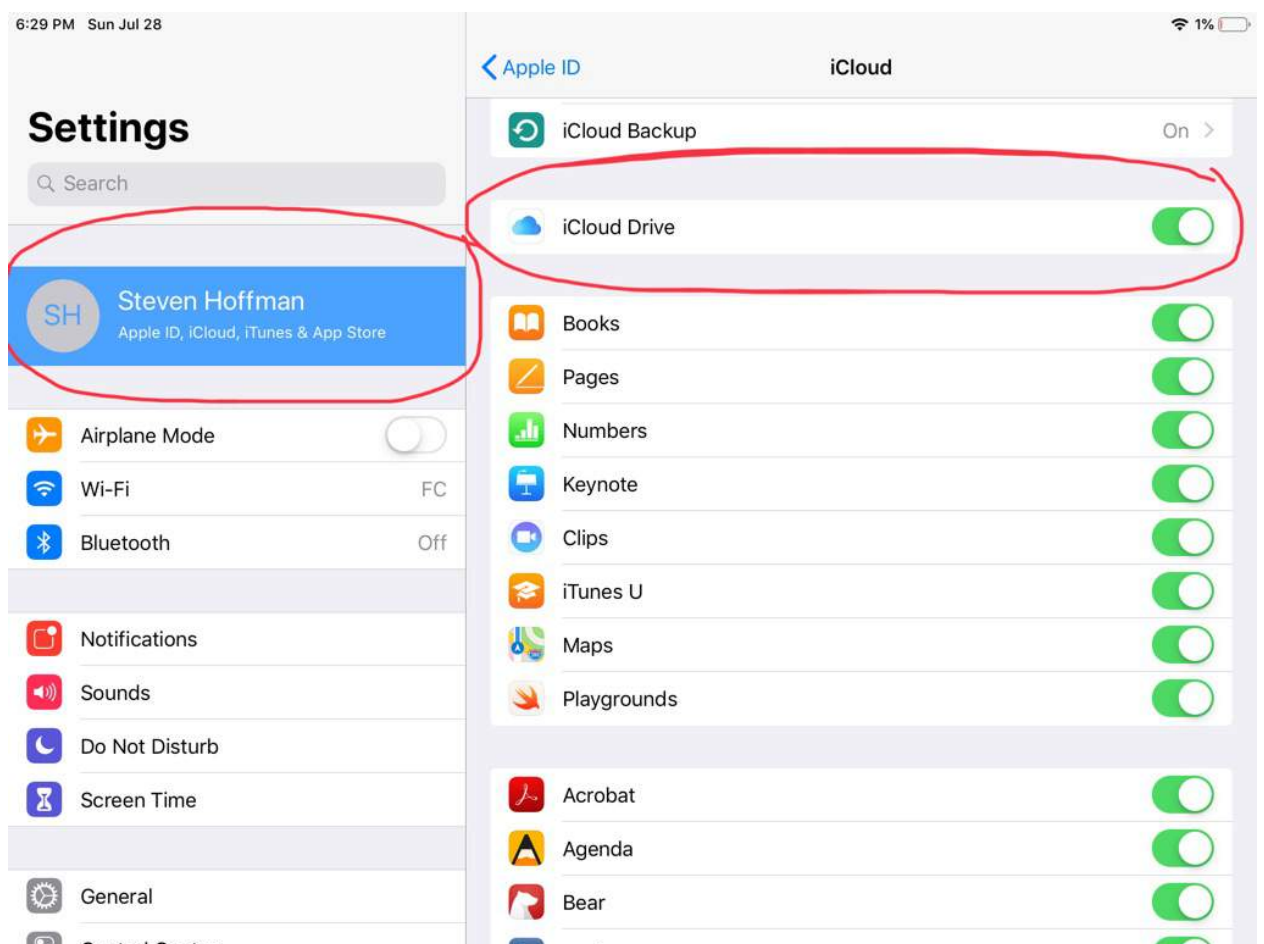
☐ Display label ☒ Required field Number

☐ Copy field when cloning record

Minimum: Maximum:

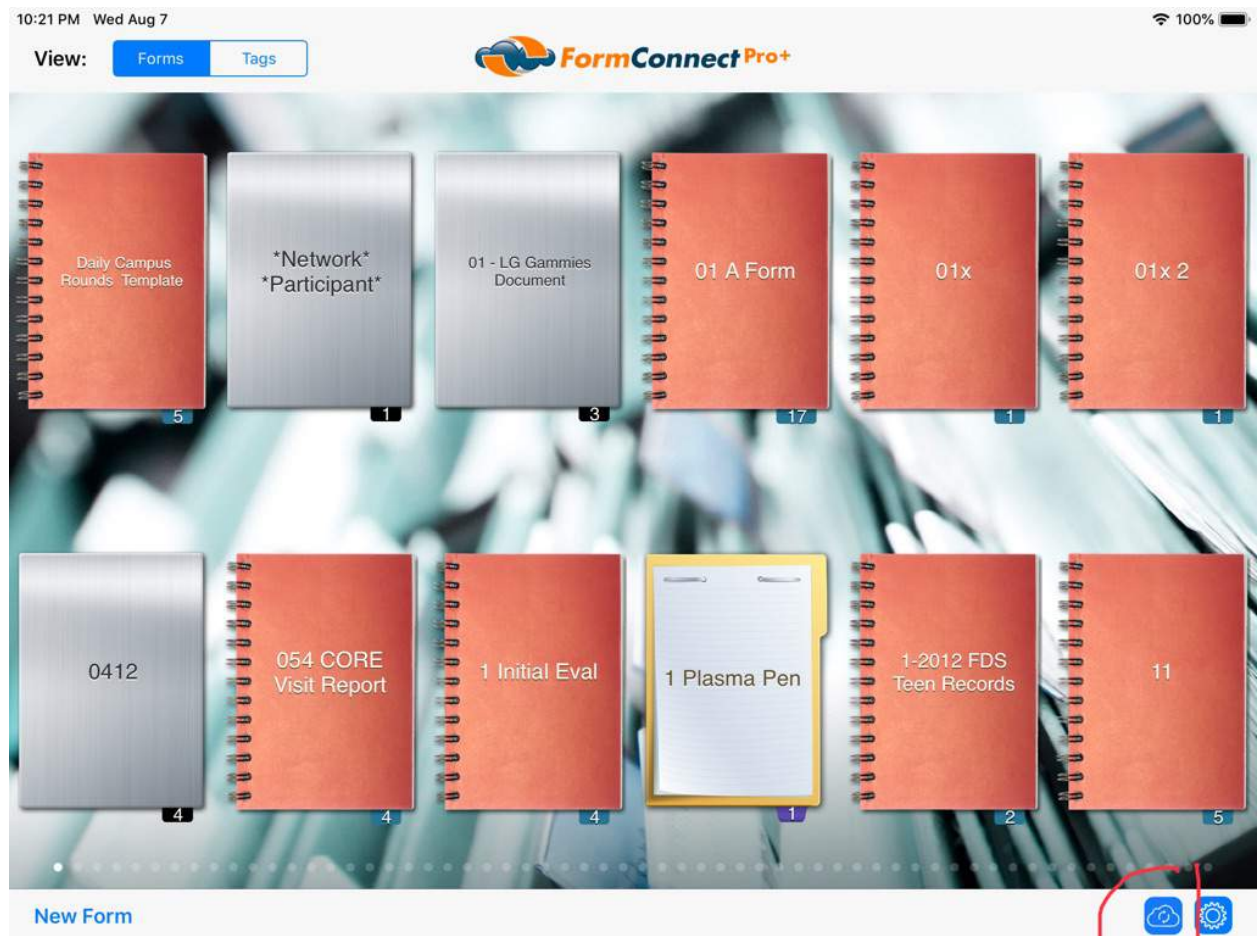
31. Form Sync (FormConnect Pro+)

- 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 occurs 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.



31. 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 be assigned their own Apple ID, purchase a separate FormConnect license and then use the Team Collaboration feature for syncing between users.



31. 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. 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.

2:09 PM Wed Jun 26

Records Save Close

Form Designer

Collaborate

Steven Hoffman (Owner)

contact.suntist@gmail.com (Joined)

rishabh0206@gmail.com (Joined)

Add People (+)

▲ Manage Rights

Stop Sharing

Summary Stock No: []

Main Product Manufacturer : []

Total Sale Price []

Vat on Bal []

Balance Inc []

Net Costs before Help On Deal: £ []

Total Help on Deal : £ []

Total of Actual Trade-Ins Values : £ []

Net Cost Incl Trade-Ins: £ []

Amount Being Paid by Customer Excl Vat []

Margir []

Total or worksnop Costs: £ []

External Haulier Cost: £ []

Extended Warranty Cost : £ []

Total Value of Trade-In Over Allowances Exc Vat Vat: £ []

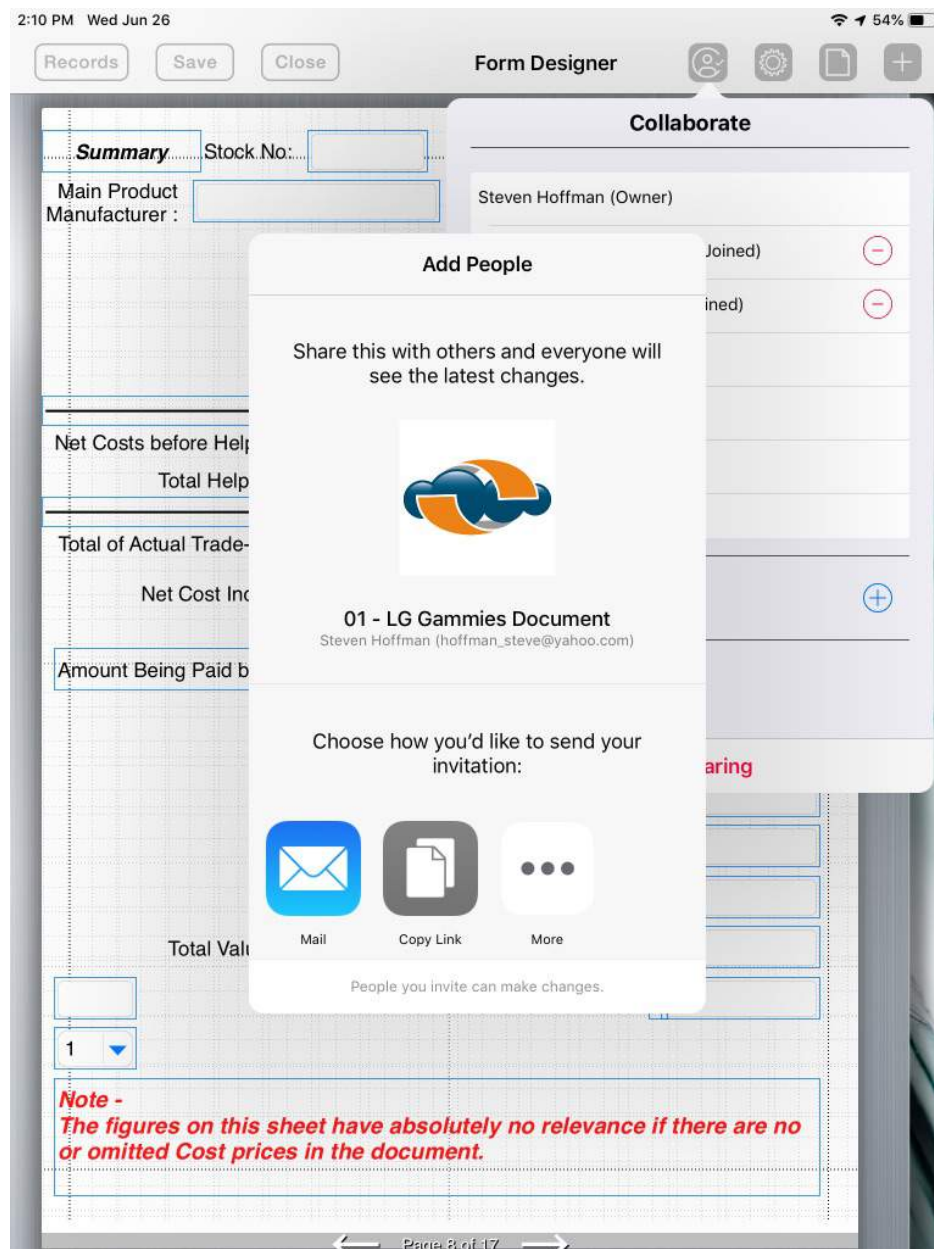
Trade-In Values on Invoice Inc Vat: £ []

Note -
The figures on this sheet have absolutely no relevance if there are no or omitted Cost prices in the document.

Page 8 of 17

32. 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.



32. 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**.

The screenshot shows the 'Form Designer' interface with a 'Collaborate' overlay. The background form is a financial summary sheet with fields for 'Summary', 'Stock No.', 'Main Product Manufacturer', 'Total Sale Price', 'Vat on Balance', 'Balance Inc', 'Net Costs before Help On Deal', 'Total Help on Deal', 'Total of Actual Trade-Ins Values', 'Net Cost Incl Trade-Ins', 'Amount Being Paid by Customer Excl Vat', 'Margin', 'Total', 'External Haulier Cost', 'Extended Warranty Cost', 'Total Value of Trade-In Over Allowances Exc Vat', and 'Trade-In Values on Invoice Inc Vat'. A red note at the bottom states: 'Note - The figures on this sheet have absolutely no relevance if there are no or omitted Cost prices in the document.'

The 'Collaborate' overlay on the right shows the owner 'Steven Hoffman (Owner)' and two joined users: 'contact.suntist@gmail.com (Joined)' and 'rishabh0206@gmail.com (Joined)'. At the bottom of the overlay, the 'Manage Rights' option is highlighted with a red circle. Below it, a dropdown menu shows 'All Users' selected. A 'Stop Sharing' button is visible at the bottom right of the overlay.

32. 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.

The screenshot displays the 'Form Designer' application interface. At the top, there's a status bar showing '2:24 PM Wed Jun 26' and a battery level of 52%. Below this, a toolbar contains buttons for 'Records', 'Save', and 'Close'. The main area is divided into two sections. On the left, a form titled 'Summary' is visible, featuring fields for 'Stock No.', 'Main Product Manufacturer', 'Total Sale Price', 'Vat on Bal', 'Balance Inc', 'Net Costs before Help On Deal', 'Total Help on Deal', 'Total of Actual Trade-Ins Values', 'Net Cost Incl Trade-Ins', 'Amount Being Paid by Customer', 'External Haulier Cost', 'Extended Warranty Cost', 'Total Value of Trade-In Over Allowances Exc Vat', and 'Trade-In Values on Invoice Inc Vat'. On the right, a 'Collaborate' panel is open, showing a list of users: 'Steven Hoffman (Owner)', 'contact.suntist@gmail.com (Joined)', and 'rishabh0206@gmail.com (Joined)'. Below the list is an 'Add People' button with a plus icon. A dropdown menu is open, showing 'Form Owner' and 'All Users' options. A 'Stop Sharing' button is also visible. At the bottom, a red note states: 'Note - The figures on this sheet have absolutely no relevance if there are no or omitted Cost prices in the document.' The page number 'Page 8 of 17' is displayed at the very bottom.

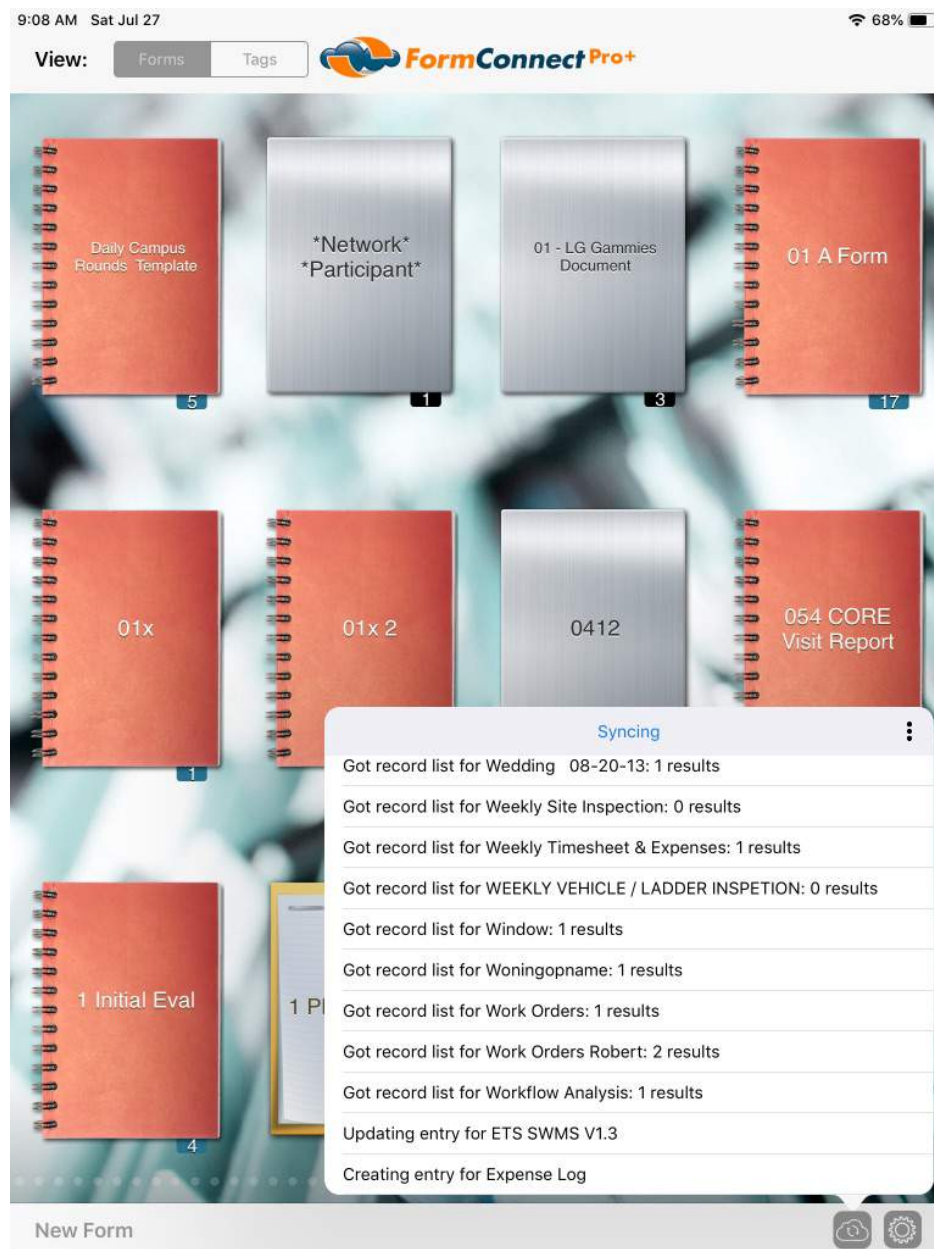
32. Team Collaboration (FormConnect Pro+)

- 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.

The screenshot displays the 'Form Designer' interface. At the top, there's a status bar with the time '2:11 PM', date 'Wed Jun 26', and battery level '53%'. Below this are buttons for 'Records', 'Save', and 'Close'. The main form area contains several input fields and labels: 'Summary', 'Stock No.', 'Main Product Manufacturer', 'Total Sale Price', 'Vat on Bal', 'Balance Inc', 'Net Costs before Help On Deal: £', 'Total Help on Deal : £', 'Total of Actual Trade-Ins Values : £', 'Net Cost Incl Trade-Ins: £', 'Amount Being Paid by Customer Excl Vat', 'Margir', 'Tot', 'External Haulier Cost: £', 'Extended Warranty Cost : £', 'Total Value of Trade-In Over Allowances Exc Vat Vat: £', and 'Trade-In Values on Invoice Inc Vat: £'. A 'Collaborate' sidebar is open on the right, showing a list of users: 'Steven Hoffman (Owner)', 'contact.suntist@gmail.com (Joined)', and 'rishabh0206@gmail.com (Joined)'. Each user has a red minus button next to them. Below the list is an 'Add People' button with a plus icon. At the bottom of the sidebar is a 'Manage Rights' section with a dropdown menu set to 'All Users'. A 'Stop Sharing' button is located at the bottom of the sidebar. At the bottom of the form, there is a 'Note' in red text: 'Note - The figures on this sheet have absolutely no relevance if there are no or omitted Cost prices in the document.' The page number 'Page 8 of 17' is visible at the very bottom.

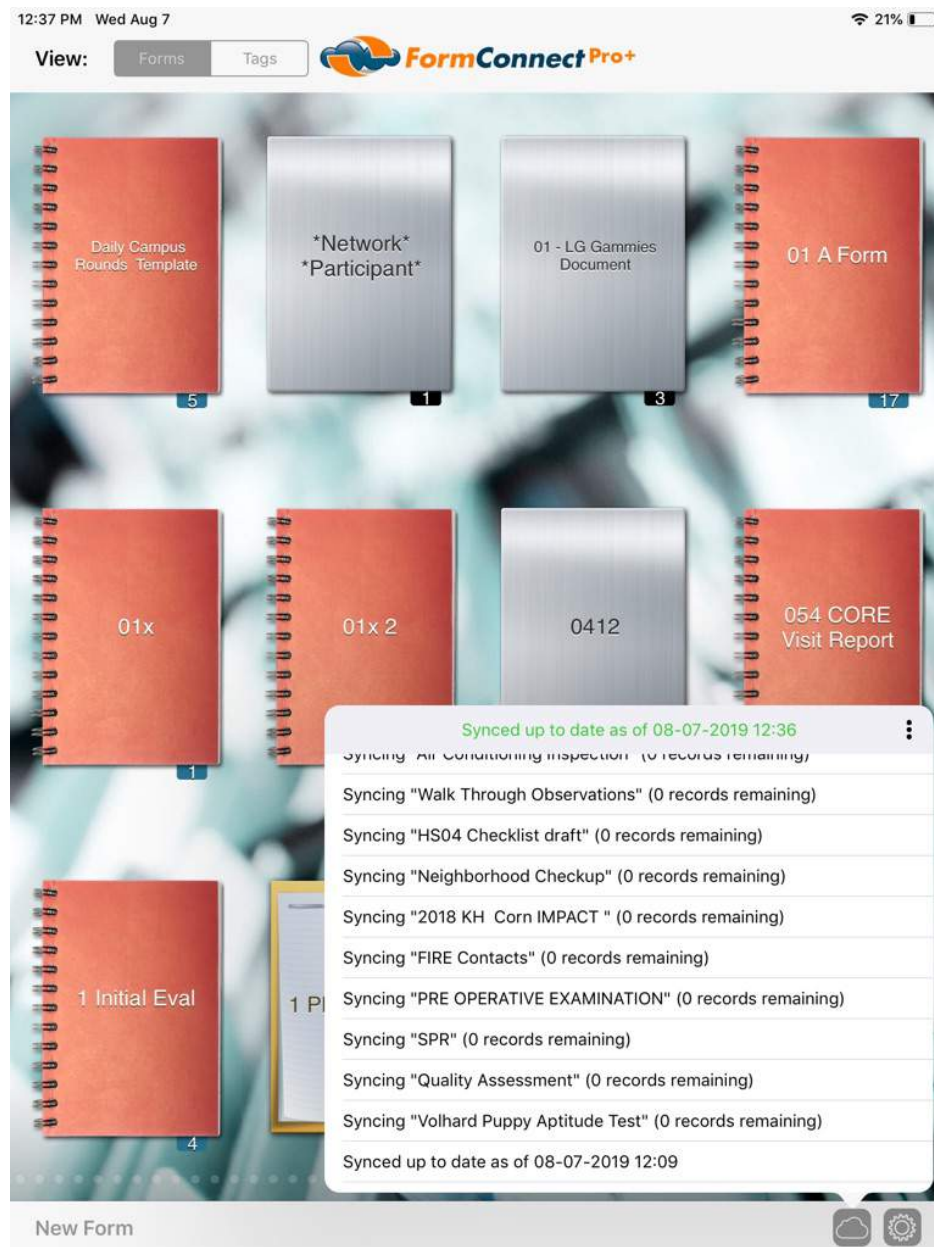
33. Monitoring Cloud Status (FormConnect Pro+)

- 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.



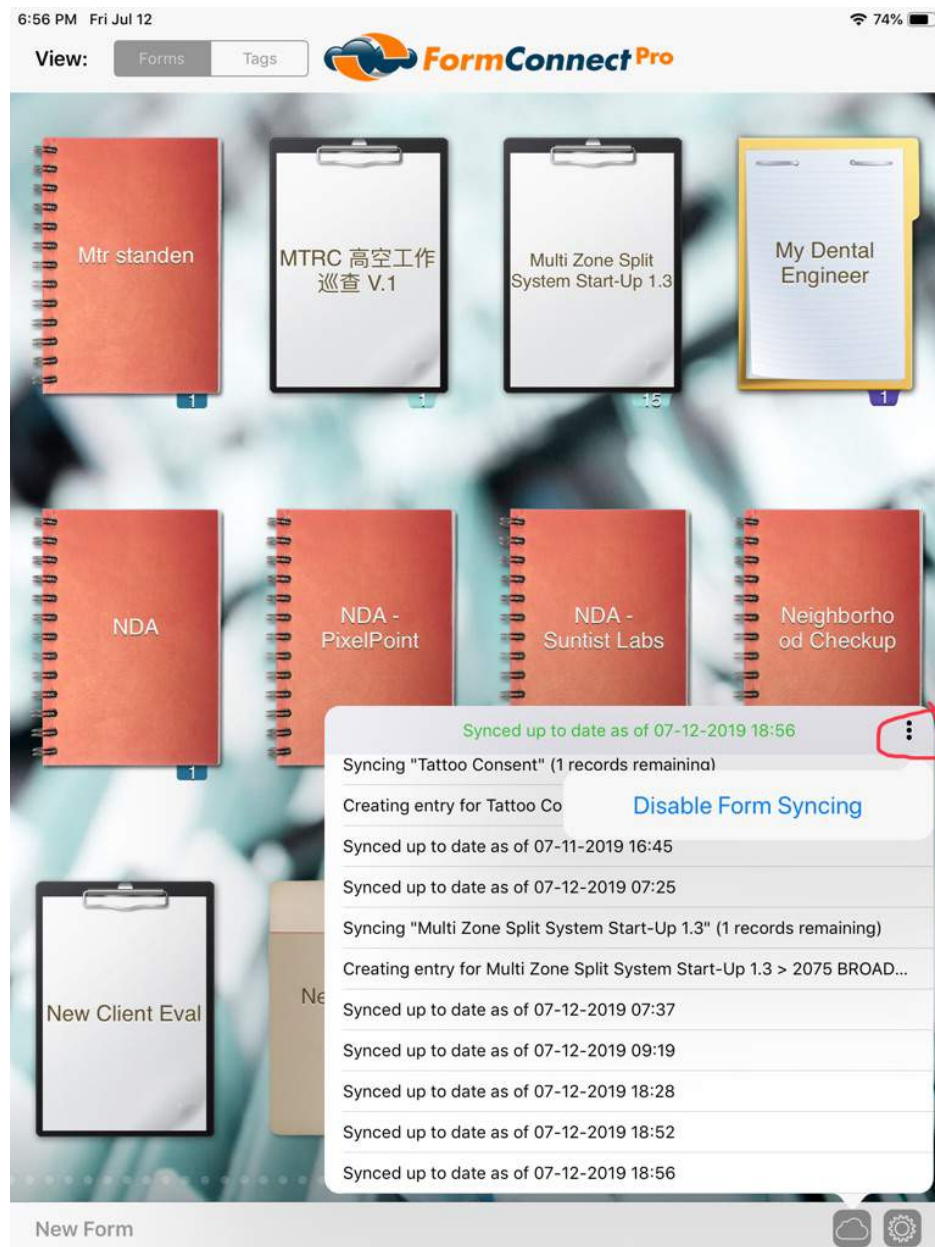
33. Monitoring Cloud Status (FormConnect Pro+)

- 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.



34. 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.



35. Recover Deleted Forms (FormConnect Pro+)

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



36. Creating Folders (FormConnect Pro+)

- Folders can be created for the purpose of organizing your forms.
- You create a folder by tapping on the gear icon in the lower right corner of the home screen.
- Once the folder has been created, you then press down on a form and drag it into the folder.





37. Multi-Windows/Multi-Session Support

- We now support the ability to have two different forms open in separate windows on your iPad.
- Multi-windows/multi-sessions support works on any iPad but works best when used with Apple's largest iPad in landscape mode.

11:25 AM Fri Aug 28

Records **Matt Trexler**

COMFORT CLIMATE CONTROL
Heating * Air Conditioning
1017 W. Foothill Blvd., Azusa, CA 91702
(626) 815-1632 * Lic # 641060 * (800) 213-6534

AIR CONDITIONING REPAIR ORDER

I hereby authorize you to proceed with the service fee for a minimum charge of \$87.00

Date: November 20, 2018 Authorization No.: 03219B P.O. No.: 18152

Customer Name: Matt Trexler Phone No.: (626) 435-2378

Service Location: 11525 Lemming St. Lakewood

Problem: A/C not cooling.

Brand: Trane Model #: 12345 Serial #: 56789

PRE-MEASURES		POST-MEASURES		BLOWER	DESIGN	ACTUAL
Suction 113	Discharge 276	Suction 116	Discharge 293	S.P. +	.3	.57
Supply 60.6	Return D.B. 75.2	Supply 55.9	Return D.B. 75	S.P. -	.74	.29
Superheat 33	Return W.B. 63.3	Superheat 21	Return W.B. 63	Total S.P.	1.04	.86
Subcool 4.5	Ambient	Sub cool 14	Ambient	Airflow	Fail	Pass

REFRIGERANT CIRCUIT **FAN TYPE**

☐ Fixed Orifice ☒ TXV ☒ PSC ☐ ECM

☐ R22 ☒ R410a ☐ Other Cooling Speed: High

SH Goal: 4-24 SC Goal: 1.4 +3

Electrical Measures

Compressor	Name Plate Amps	12.4	Actual Amps	11.1	L1 to Ground	122
Condenser Fan Motor	Name Plate Amps		Actual Amps		L2 to Ground	120
Indoor Fan Motor	Name Plate Amps		Actual Amps		L3 to Ground	120
Safety Switch	Name Plate Amps	50	Actual Amps	60	Total Volts	362

Page 1 of 2

Records **Custom Plan**

FOOD CONTROL PLAN - VERIFICATION RECORD
Ruapehu District Council
P: 07 895 8188
E: info@ruapehu.govt.nz

Premises name: Farleigh

Date: 20 February 2019 Start time: 12:36 PM Finish time: 1:36 PM

Food Safety Plan: Custom Plan Type of verification: Scheduled

Confidence in Management
Registration / Scope of Operations

Details of the business align with what is registered in the MPI MAPs database including scope of operation and number of sites. For custom Food Control Plans businesses no processes have been added without evaluation. Where there are changes from what is registered these have been notified with an application or written notice of change. Any tailoring of template FCPs is done appropriately and covers the full scope of operations.

☐ Performing ☒ Conforming ☐ Non-Conforming ☐ Non-Compliance ☐ Critical Non-Compliance

☐ N/A

Traceability, Recall and Complaints

Appropriate procedures for product identification, traceability and complaint management and recall are in place and adhered to. For traceability, consideration is given to ingredients, in process, rework, storage, dispatch and sale. Traceability records are kept. (Note: complaints and recalls management is under Compliance History).

☒ Performing ☐ Conforming ☐ Non-Conforming ☐ Non-Compliance ☐ Critical Non-Compliance

☐ N/A

Documentation and Record Keeping

Records are of appropriate quality and content, available to appropriate staff and kept for 4 years. There is evidence of document (version) control.

☐ Performing ☐ Conforming ☒ Non-Conforming ☐ Non-Compliance ☐ Critical Non-Compliance

☐ N/A

Competency of Management

Competency and skills required for management (including team leads) are identified and recorded. Management have the appropriate competencies and skills. Training records are kept.

☐ Performing ☒ Conforming ☐ Non-Conforming ☐ Non-Compliance ☐ Critical Non-Compliance

☐ N/A

Page 1 of 18

38. Sorting Records (FormConnect Pro+)

- Records can be sorted in both ascending and descending order by tapping on the up and down arrows.

11:45 AM Fri Aug 28

Building Info. Berkeley Basketball Stadium Fred Finch Park

Records (31)

Search Cancel

Berkeley Basketball Stadium Fred Fi...

Berkeley Community Hall & Senior...

Berkeley Sports & Social Club Ame...

Berkeley Sports & Social Club Plant...

Chapel/Office

Chapel/Office

Cringila Community Hall (Large)

Cringila Community Hall (Small)

Cringila Multipurpose Community C...

Equipment/Generator Room

Hay Shed

Helensburgh Community/Youth Cen...

Helensburgh Library

Kiosk Adjoining Berkeley Sports

Koonawarra Community Centre

APV Bldg Data Collection

Inspected?

Building: Berkeley Basketball Stadium Fre... Asset ID: B02831

Location: Fred Finch Park Bldg Code:

Address: Hooka Creek Road Date:

Suburb: Berkeley Method: Consumption

Photo 1: Photo 2: Constr. Year:

Sub Struct: Supports: Sub Struct Cond:

Super Struct: Int. Walls: Super Struct Cond:

Finish: Elect: Int Doors: Ext Doors: Plumbing:

Painted 3 Phase Personnel Water

Cem/Rend 1 Phase Steel Roller WC

Other Finish Incand't Alum/Glass Septic

Fluro Automatic Kitchen

High Density Staircase: HW Sys

Floor Cov: Floor Cov Cond:

Fitout: Ceiling: T/Panel Fitout Cond:

P/Board

Flat A/C

Roof: Roof Cond:

Page 1 of 10

39. Clipboard (FormConnect Pro+)

- A clipboard can be used to store text that can be copied and pasted onto a field on the form.
- To invoke the clipboard, tap on the clipboard icon on the toolbar.
- To add text, tap on the plus (+) symbol.
- To copy, select the text and then drag it onto the field.

6:59 PM Thu Jul 29 68%

Records [Clipboard Icon] [Share Icon] [List Icon]

Clipboard [Edit] [Add]

Assessment
High blood pressure and elevated cholest...

Phone Number
(213) 495-1908

Email Address
john.doe@xyz.com

Work Area
All work areas were left in a clean manner...

Customer Requirement
Replace electrical conduit.

Electrical Service Solutions, Inc.
11111 Main St. #377 Huntington Beach, CA 92649
(714) 847-3774
www.essi-us.com

Job Ticket #: 1

Service Type: ☒ T&M ☐ Quoted

P.M.P.: ☐ 1 Time ☒ Contract

Technician's Name: Jack Smith

Customer: Taylor Motors Job Site/Name: Bldg. 10

Address: 2500 Main Street Address: 1855 Maple Street

Requested By: Bill Carson Site Contact: Roger Williams

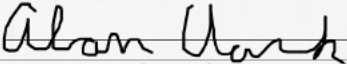
Phone #: (949) 495-1266 Phone #: (714) 395-1221

Work Required/Customer Request:
Replace electrical conduit.

Terms, Exceptions, Clarifications, and Exclusions apply as indicated on Proposal provided by Electrical Services Solutions, Inc.

AUTHORIZATION TO ENTER PREMISES AND COMMENCE WORK

I authorize Electrical Service Solutions, Inc. and service personnel to enter premises to perform the work requested herein. Customer promises to pay for all work performed in accordance with Electrical Service Solutions, Inc.'s terms, conditions, and fee schedule.


Customer Signature: Alan Clark Supervisor 24 February 2018

Name Title Date

Work Performed:
Replaced electrical conduit.

☒ Complete ☒ Order Parts ☐ Go Back Tomorrow ☐ Re-Schedule ASAP ☐ Re-quote ☐ Call Customer

I hereby acknowledge that the authorized work referenced above has been completed to my satisfaction.


Customer Signature: Alan Clark Date: 24 February 2018

40. Index Tabs (FormConnect Pro+)

- Tabs can be placed on a form to help navigate between pages.

10:54 AM Tue Jul 27 Records FormConnections, Inc. 23%

office evolution
Work Empowered™

SERVICE DETAILS **Member Service Agreement**

Home Location Office Evolution Houston Energy Corridor	Start Date 02/08/2021	Client/Member # 12345
Plan Name Plan B	Setup Fee \$100.00	Monthly Fee \$50.00

DEDICATES SPACE DETAILS

Space Number 14	Service Retainer \$250.00	Term Length 1 year	End Date 26 February 2021
--------------------	------------------------------	-----------------------	------------------------------

ADDITIONAL SERVICES

Description	Setup Fee	Monthly Fee
Internet	\$150.00	\$75.00
Office Furniture	\$125.00	\$50.00
Receptionist	\$275.00	\$100.00

PAYMENT SUMMARY

Service Retainer Summary \$250.00	Setup Fee Total \$350.00	Monthly Fee Total \$264.00
--------------------------------------	-----------------------------	-------------------------------

NOTES (for Center use only)

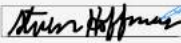
This is a test. This is a test of the public broadcast system. If there was an outage, you would be redirected to your local station.

MEMBER AND BILLING INFORMATION

Company Name FormConnections, Inc.	<input checked="" type="checkbox"/> Use Member information for billing
Member Name John Doe	Billing Contact Name John Doe
Member Phone Number (646) 363-6900	Billing Phone Number (646) 363-6900
Member Email john.doe@formconnections.com	Billing Email john.doe@formconnections.com
Member Street Address 25200 Main Street	Billing Street Address 25200 Main Street
Member City, State, Zip Los Angeles, CA 92677	Billing City, State, Zip Los Angeles, CA 92677

☒ Member authorizes auto-bill for monthly recurring payments ☒ Member agrees to the Terms and Conditions

By providing your credit card or bank information, you accept the Terms and Conditions and the service pricing as laid out in this document.

Printed Name Jonathan Williams Signature  Date Signed 16 September 2020

Page 1 of 9

40. Index Tabs (FormConnect Pro+)

- Index Tabs are accessed via the “Form Settings” option.

6:57 PM Tue Jul 27

Save Close

Form Designer

office evolution
Work Empowered™

Member Service Agreement

SERVICE DETAILS

Home Location	Start Date	Client/Member #
Office Evolution Houston Energy Corridor		
Plan Name	Setup Fee	Monthly Fee

DEDICATES

Space Number

Letter

ADDITIONAL

PAYMENT S

Service

NOTES (for

MEMBER A

Company Name

Member Name

Member Phone

Member Email

Member Street Address

Member City, State, Zip

Billina Street Address

Billina City, State, Zip

Member agrees to the Terms and Conditions

By providing your credit card or bank information, you accept the Terms and Conditions and the service pricing as laid out in this document.

Printed Name

Signature

Date Signed

Page 1 of 9

40. Index Tabs (FormConnect Pro+)

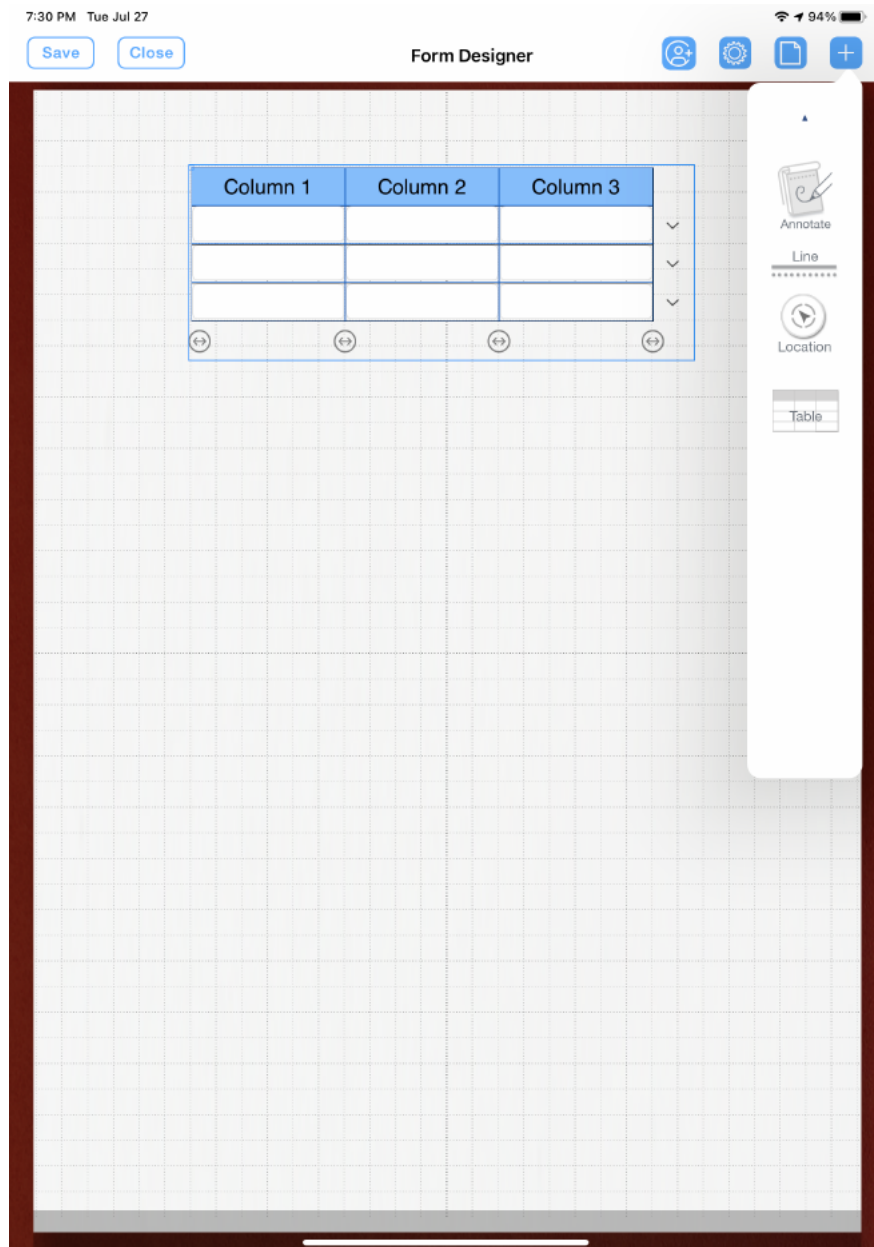
- To add an Index Tab, tap on the plus (+) symbol. You can then specify the title of the tab and the page number.

The screenshot displays the Form Designer application on a mobile device. The background shows a form titled "Member Service Agreement" with various fields like "Home Location", "Start Date", "Client/Member #", "Plan Name", "Setup Fee", and "Monthly Fee". A vertical sidebar on the right contains tabs for "Member Agreement", "Terms/Conditions", "Mail Forwarding", "Bus. Ctr. Rules", and "Credit Card". Overlaid on the form is a "Settings" dialog box titled "Index Tabs". This dialog lists five index tabs with their titles and linked page numbers: "Member Agreement" (Page 1), "Terms/Conditions" (Page 2), "Mail Forwarding" (Page 5), "Bus. Ctr. Rules" (Page 7), and "Credit Card" (Page 9). Each entry has a red minus icon to its right. At the bottom of the dialog is a "+ Add Index Tab" button. The top of the screen shows the status bar with the time "6:57 PM", date "Tue Jul 27", and battery level "98%". The bottom of the screen shows "Page 1 of 9" with a right arrow.

- Note: Enabling Index Tabs only works on the iPad or the Mac.

41. Tables (FormConnect Pro+)

- A “table” field type can be used to organize fields into a table layout that contains rows and columns.



41. Tables (FormConnect Pro+)

- Both the text column headings and the data entry fields can be edited.

7:11 PM Tue Jul 27

Records

Arctic Stationary

Qty	Description	Price	Amount
12	Paper	\$16.75	\$201.00
8	Ink Cartridges	\$24.39	\$195.12
10	Printers	133.99	1339.9
		Total	\$1,736.02

42. Drawing Tools (FormConnect Pro+)

- A new “Annotate” field type has been added where you can insert images directly on the form and then annotate on top of them.

2:45 PM Fri Oct 14

Form Designer

Save Close

Annotated Image

Patient Name:

Age:

DERMATOMES INNERVATED BY POSTERIOR ROOTS

DERMATOMES INNERVATED BY POSTERIOR ROOTS

Annotate

Line

Location

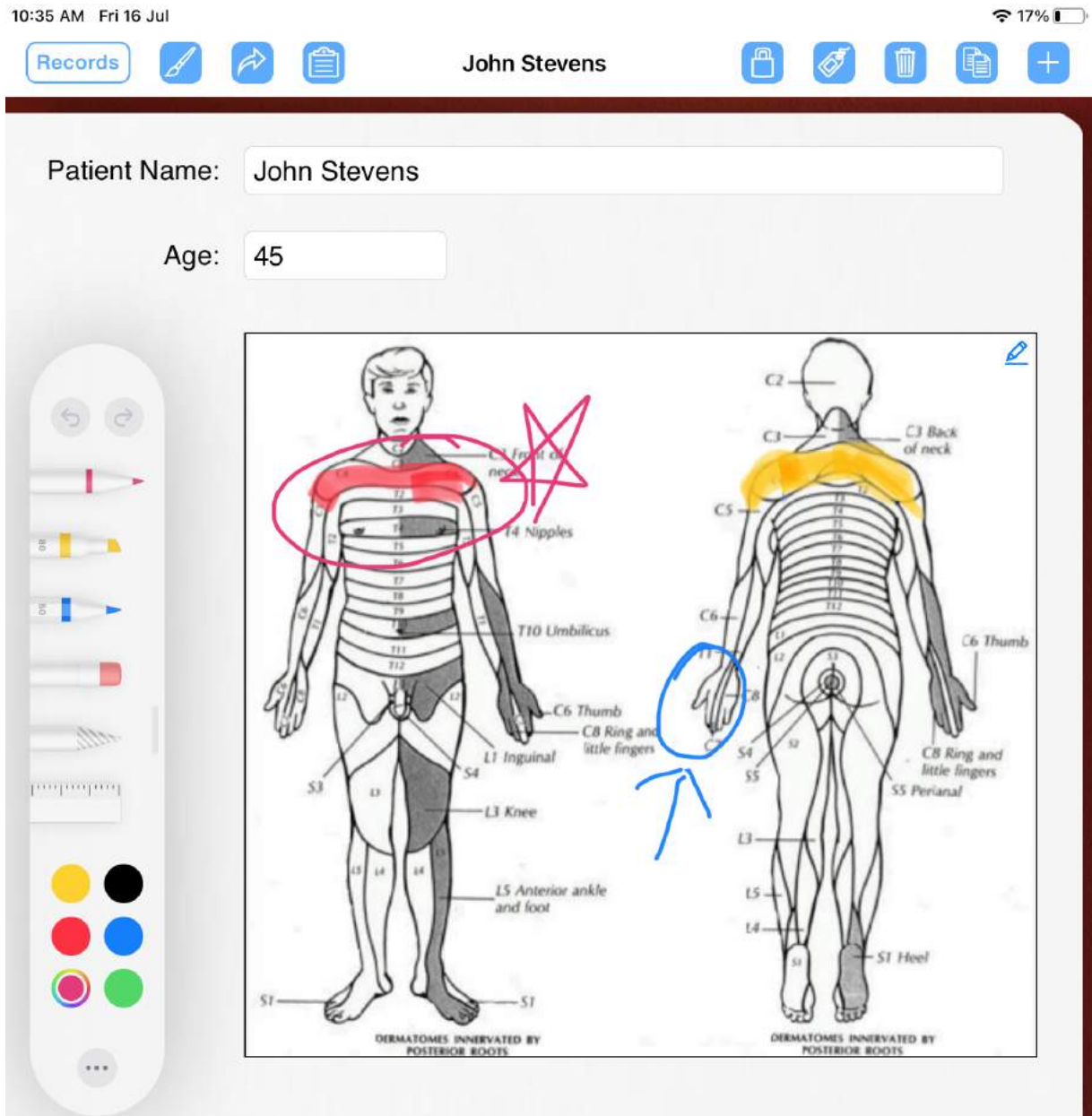
Table

Script Button

Barcode

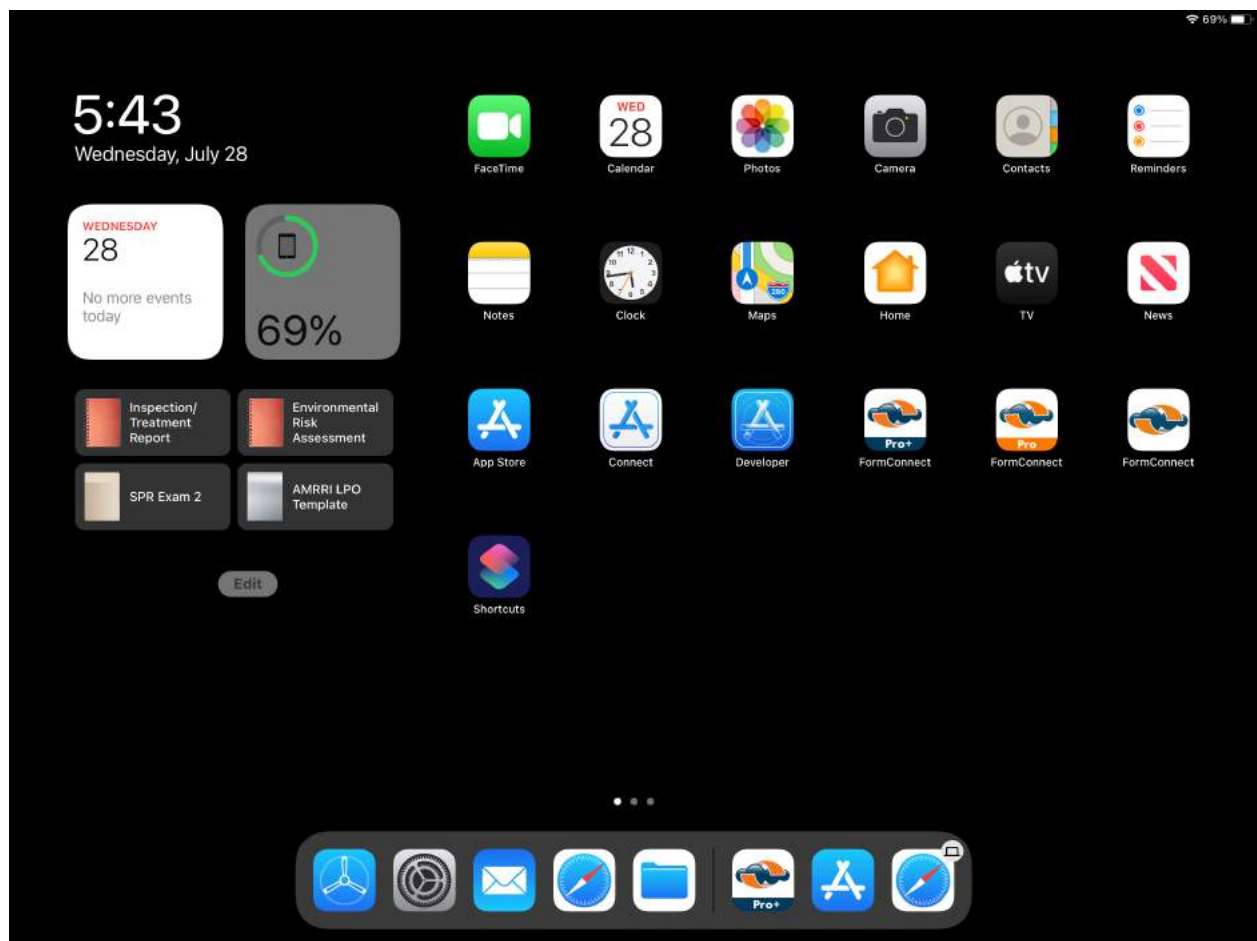
42. Drawing Tools (FormConnect Pro+)

- Below are some of the drawing tools that the user has access to when they tap on the pencil icon.



43. Widget

- A FormConnect widget is a customized icon that can open one or more forms from the home screen without having to launch the app.
- The widget dynamically updates itself by displaying the latest forms that have been recently opened.
- The widget is placed on the home screen and can be accessed by editing the widget wizard and selecting the FormConnect wizard.



44. Keyboard Shortcuts

- iPads that have an external keyboard can access keyboard shortcuts for automating certain tasks.
- Keyboard shortcuts can be accessed by holding down the cmd (⌘) key next to the spacebar.
- There are 10 shortcut commands. Some require holding down the cmd (⌘) key and others don't.

The screenshot shows a mobile application interface. On the left, there is a list of records under the heading 'Records (6)'. The records are: Clark Lois (selected), Jones Deacon, Jones Dean, Joshi Sagar, Smith Willy, and Wentz Clarise. On the right, there is a form for 'Clark Lois'. The form includes fields for Date (11 January 2018), Email (steve@formconnections.com), Address, Telephone contact, Mothers Name, and Address (gg). A keyboard shortcuts menu is overlaid on the form, listing 10 shortcuts:

Shortcut	Command
Go to next field	tab
Go to previous field	shift tab
Escape	esc
Move selection up	↑
Move Selection down	↓
Clone selected record	⌘ K
Edit Form Design	⌘ E
Create New Record	⌘ N
Open Form Settings	⌘ F
Close Form	⌘ W
Search Record	⌘ S
Go To Next Page	→

45. Form Tabs (FormConnect Pro+)

- Form Tabs is a way to have multiple forms open at the same time via a tab interface.
- To open a tab, tap on the overlapping (+) symbol in the upper right corner.
- A list of all your forms will be displayed. Scroll down to the form you wish to open or use the search bar.
- YouTube Video - <https://youtu.be/50B0dA8Hog>

The screenshot displays the FormConnect Pro+ mobile application interface. At the top, the status bar shows the time as 6:54 PM on Monday, March 14, with a battery level of 82%. The app's navigation bar includes icons for Records, a pencil (edit), a share icon, a clipboard, and a plus sign for additional actions. Below the navigation bar, there are three tabs: 'Contacts' (selected), 'Invoice', and 'Insurance'. The main content area is titled 'Contacts Form' and contains the following fields:

- First Name:** Jim
- Last Name:** Smith
- Photo:** A small portrait photo of a man with glasses.
- Company:** Molton Toy Store
- Title:** Vice President
- Business Address:** 7633 Wilshire Blvd.
- City:** Los Angeles
- State:** CA
- Zip:** 90064
- Daytime Phone:** (310) 454-2122
- Fax Number:** (310) 692-1277
- Mobile Phone:** (213) 837-4210
- Home Phone:** (213) 837-5671
- Home Address:** 2305 Raineer
- City:** Los Angeles
- State:** CA
- Zip:** 90034
- Email Address:** Jim@moltontoy.com
- Web Address:** http://www.moltontoy.com
- Notes:** A large text area for additional information.
- Signature:** A digital signature of Jim Smith, written in black ink over a white background.

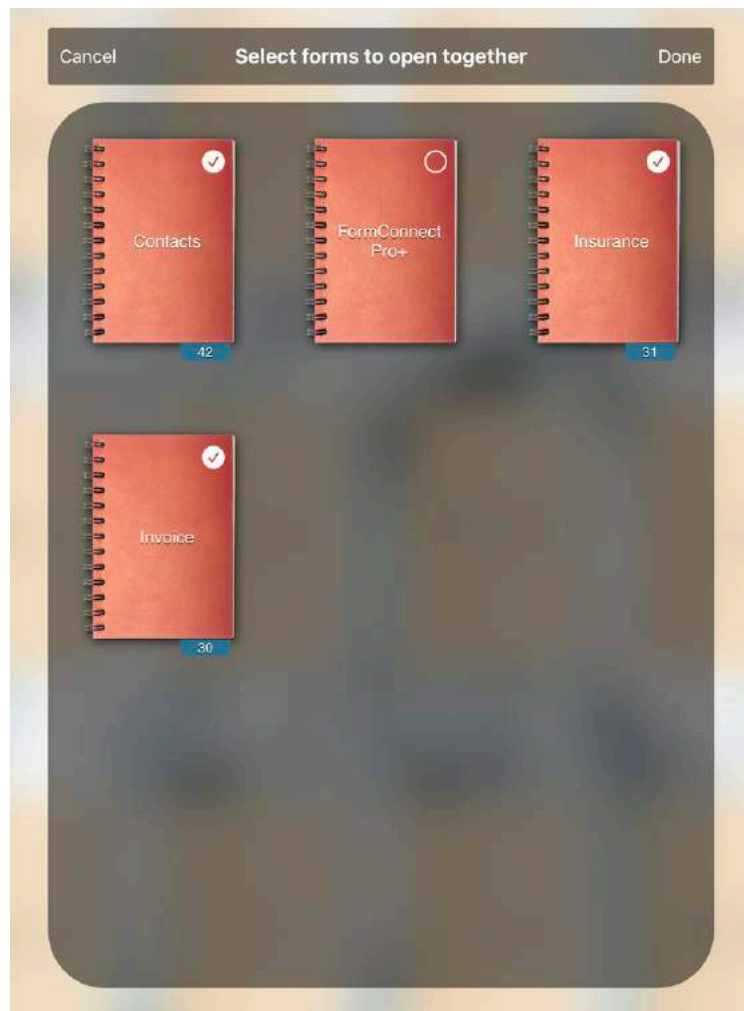
46. Auto Launch (FormConnect Pro+)

- The [Auto Launch](#) feature allows you to specify which forms to open at the same time.
- To enable this feature, create a folder and then drag your forms inside the folder.
- Tap on the [Auto Launch Button](#) at the bottom of the folder. A [little circle](#) will appear in the upper right corner of each form.



46. Auto Launch (FormConnect Pro+)

- Tap on the “**circle**” to place a **check** next to each form.
- Tap on the <**Done**> button to save your changes. A little “**auto launch**” symbol will appear.
- When you <**tap**> on any of the forms that have the **auto launch symbol**, they will all open together.



- YouTube Video - https://youtu.be/jaQ_hjrhoLs

47. Field Linking (FormConnect Pro+)

- **Field Linking** allows you to link two or more fields or forms fields together so that when you fill out a field on one form or page, it automatically updates the same field on another page or form.
- Examples of common fields across various forms would be the customer's name, address, city, state, zip, phone number, email address, etc.
- By linking these forms and fields together, you save yourself time in not having to re-enter the same information over and over again.
- To enable this feature, tap on the **Paint Brush** and the **Link** button on the Toolbar.



47. Field Linking (FormConnect Pro+)

- The “**Field Linker**” screen will appear and you will be prompted to select the **fields** and **forms** that you wish to link together.
- Once you’ve selected the **fields** and the **forms** to link together, a **<black arrow>** will display showing the relationship between the forms and fields.
- In the example below, the **Contacts** form is linked to the **Insurance** and **Invoice** forms. All three forms share some common field names (First Name, Last Name, Company, Business Address, City, State, and Zip).
- When you fill out the **Contacts** form, the **Insurance** and **Invoice** forms get updated with the common fields that the three forms have in common.

Parent Form:		Linked Forms:	
Contacts		Insurance	
		Invoice	
Parent Fields:		Linked Fields:	
First Name		First Name	
City		City	
Company		Company	
State		State	
Last Name		Last Name	
Zip		Zip	
Business Address		Business Address	

- If you wish to learn more about linking forms together, watch the YouTube Video - https://youtu.be/J4YrAu_Lw5s

48. Scripting (FormConnect Pro+)

- The **Scripting** feature allows you to automate certain commands by adding **Buttons** to your form.
- To add a **Button** to your form, tap the <Paint Brush> icon and the <Plus (+)> symbol to **Add** a new field.
- Then select the <Script Button> and position it on the form.

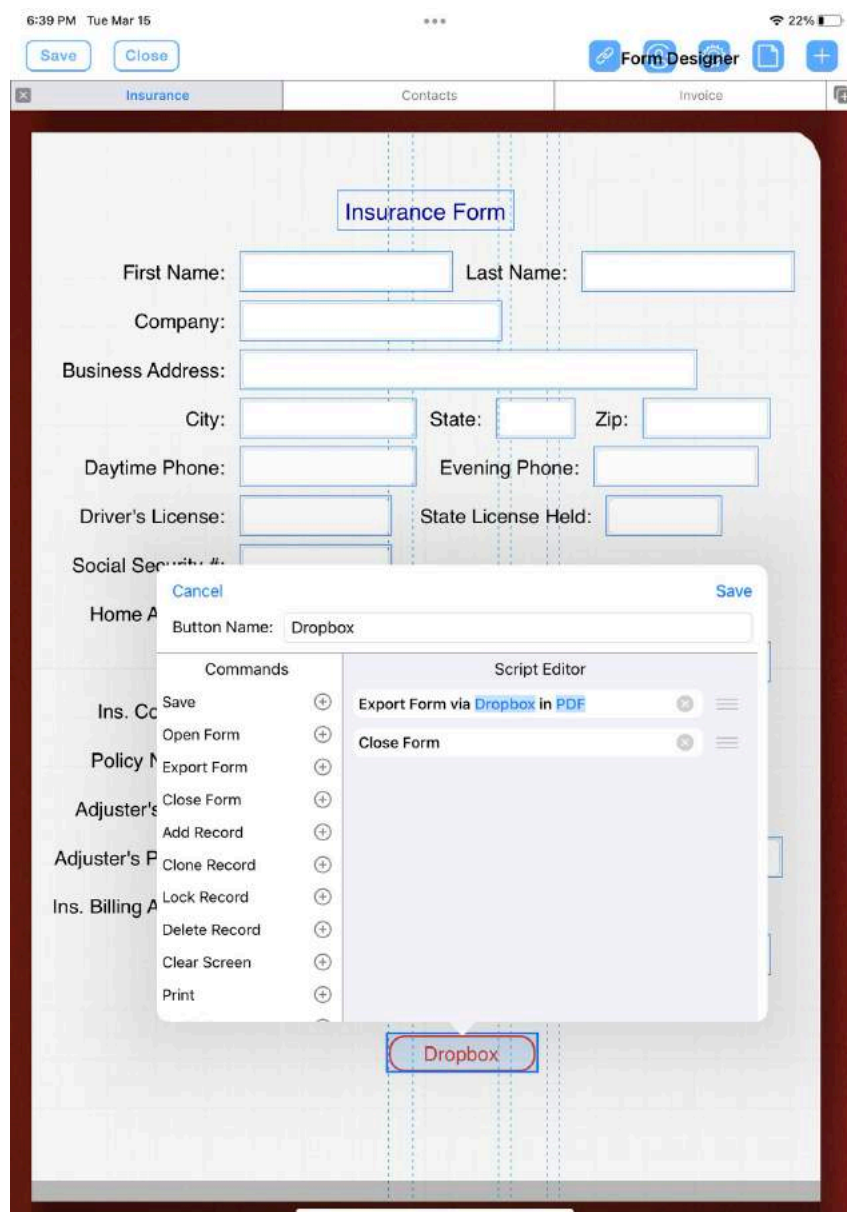
The screenshot displays the 'Form Designer' application interface. At the top, there's a status bar with the time '6:35 PM Tue Mar 15' and battery level '22%'. Below this is a toolbar with icons for 'Save', 'Close', and other design tools. The main workspace shows a form titled 'Insurance Form' with the following fields:

- First Name: [text box]
- Last Name: [text box]
- Company: [text box]
- Business Address: [text box]
- City: [text box] State: [text box] Zip: [text box]
- Daytime Phone: [text box] Evening Phone: [text box]
- Driver's License: [text box] State License Held: [text box]
- Social Security #: [text box]
- Home Address: [text box]
- City: [text box] State: [text box] Zip: [text box]
- Ins. Company: [text box]
- Policy Number: [text box] Claim Number: [text box]
- Adjuster's Name: [text box]
- Adjuster's Phone #: [text box] Adjuster's Fax: [text box]
- Ins. Billing Address: [text box]
- City: [text box] State: [text box] Zip: [text box]

At the bottom of the form, there is a 'Dropbox' button. On the right-hand side, a vertical toolbar contains icons for 'Annotate', 'Line', 'Location', 'Table', and 'Script Button'. The 'Script Button' icon is highlighted with a red circle.

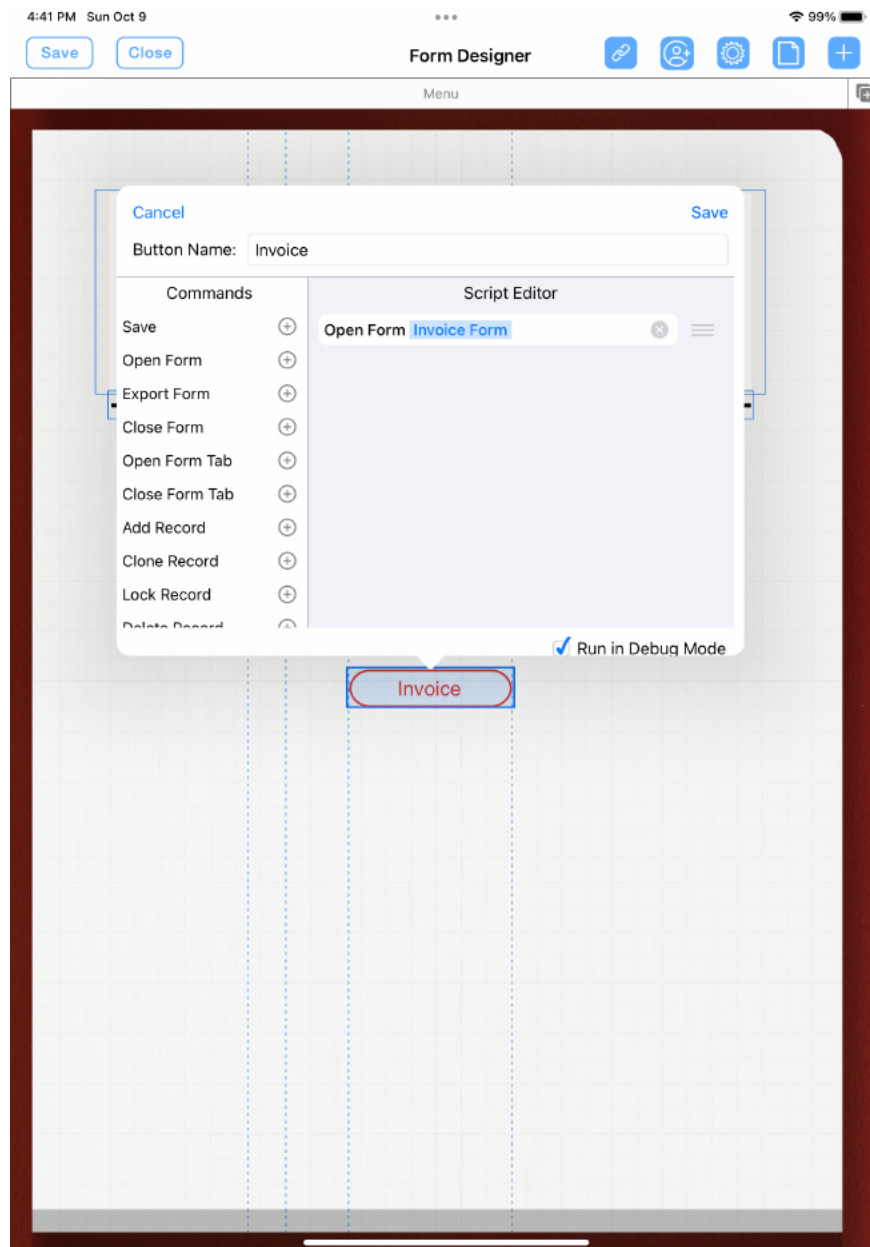
48. Scripting (FormConnect Pro+)

- This will display the **Script Editor** where you can add (+) a series of commands (listed on the left) to build your script.
- Assign a **Button Name** to the script.
- Tap on the <**Save**> button to exit the **Script Editor**.
- To execute the script, tap on the **Button** to execute the script.
- YouTube Tutorial - <https://youtu.be/9PwGlGuRcGU>



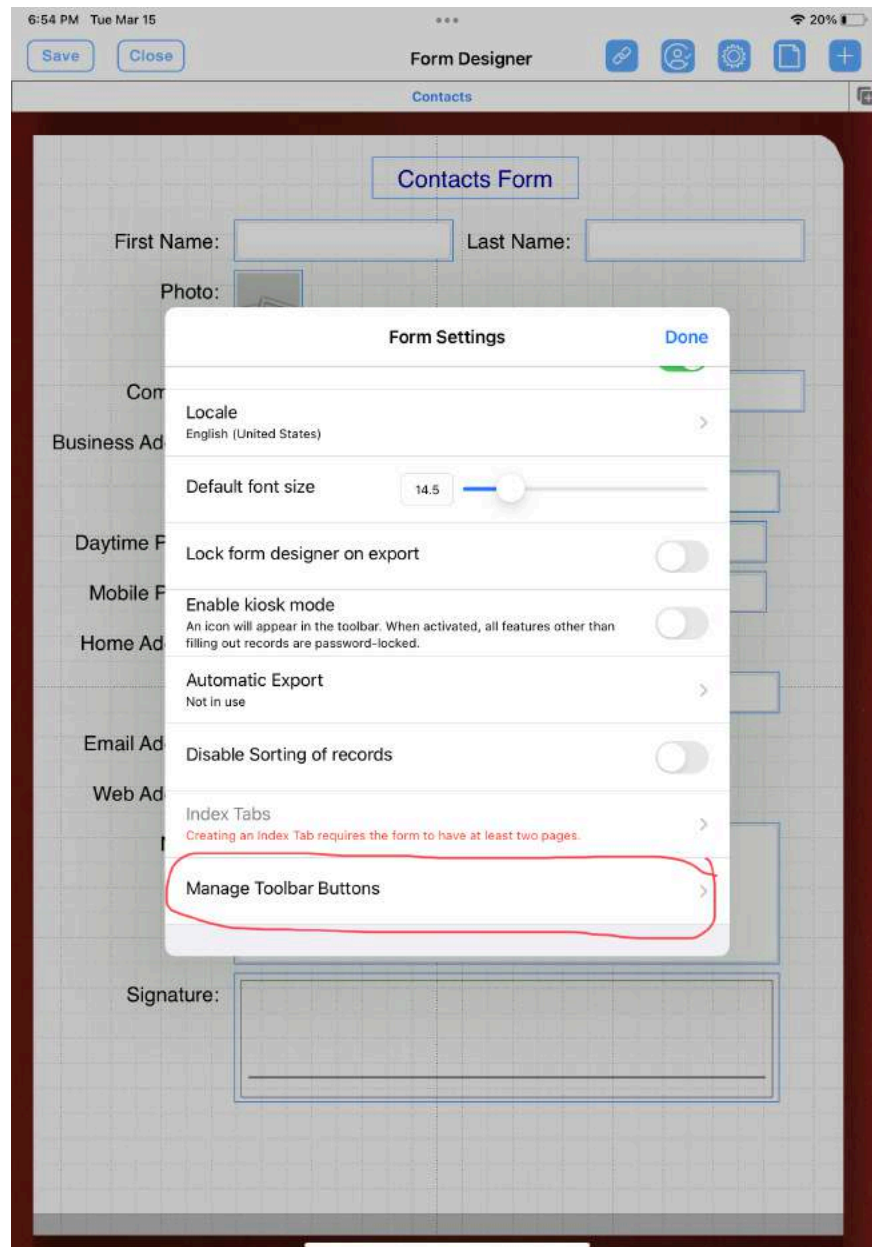
48. Scripting (FormConnect Pro+)

- To debug a problem with a script you have created, enable the setting “[Run in Debug Mode](#)” and execute the script again.



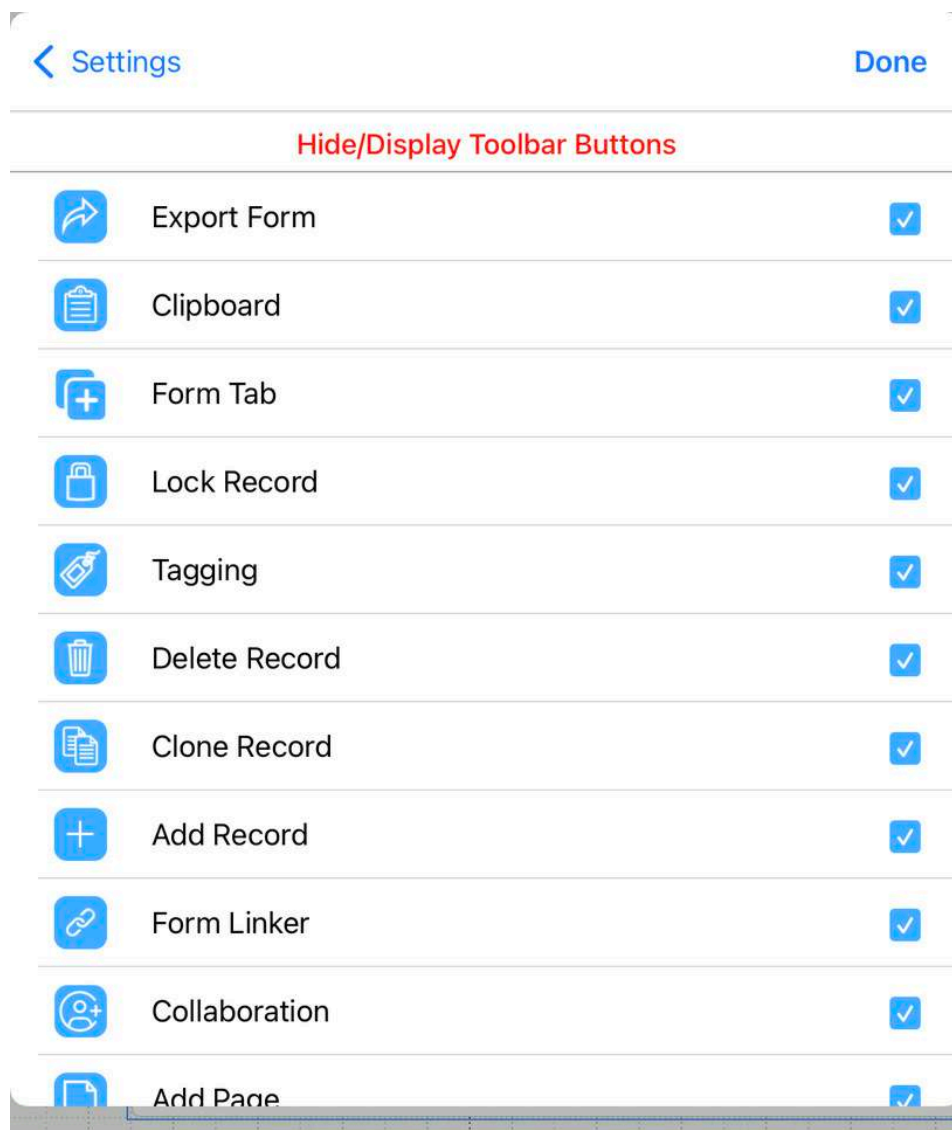
49. Toolbar Changes (FormConnect Pro+)

- The Toolbar displays a series of buttons that when tapped, initiates a specific action.
- You can customize your toolbar by invoking your Form Settings and tapping on the “[Manage Toolbar Buttons](#)” setting.




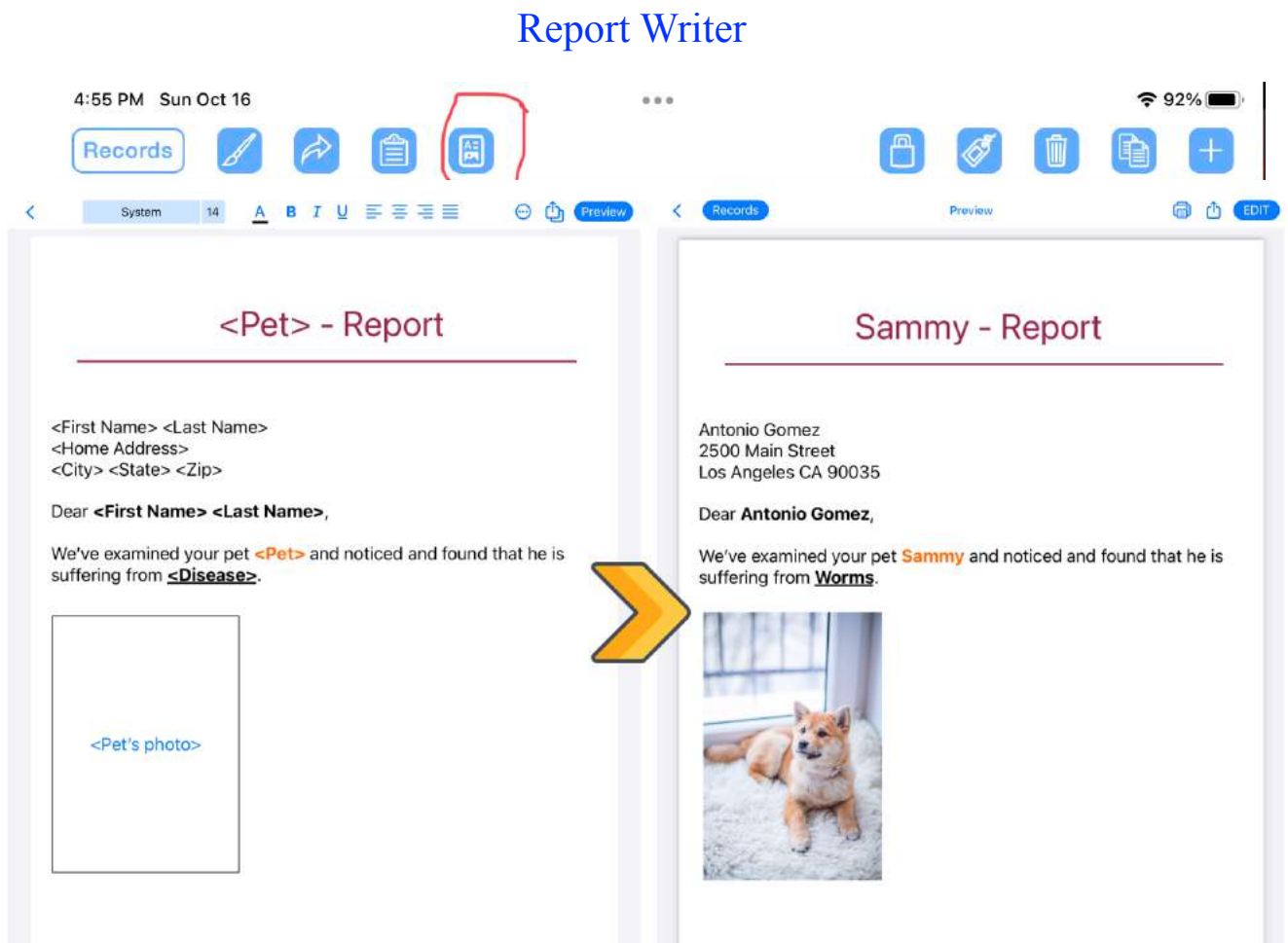
49. Toolbar Changes (FormConnect Pro+)

- All of your menu buttons will display on the screen.
- **Tick** which buttons you wish to display and then tap on the **Done** button to save your changes.
- If you wish to learn more about making changes to your toolbar, watch the YouTube Video - <https://youtu.be/izfdwgrJxc8>




50. Report Writer (FormConnect Pro+)

- The report writer can be used to create a custom report for each form.
- To invoke the report writer, tap on the  button.
- The report writer comes with a text editor for entering text, photos and tables.
- It also comes with support for the mail merge function which can be used to insert field names with brackets <field name>.






50. Report Writer (FormConnect Pro+)


- To insert field variables directly into the document, tap on the  button on the toolbar and specify the field name.


5:22 PM Sun Oct 16


System Font 14


  Preview

Insert Field 

Insert Photo 

Insert Table 

Insert Line 

Insert Page 

Tenant Deposit Issues

<Property address>

<Photo 1>



	A	B	C	D
1	Report Details			
2	Client:	<Client>	Inspection Date:	<Inspection date>
3	Inspector:	<Inspector>	Inventory Date:	<Date of
4	Comments			
5	Description:	<Property description >		
6	Note:	<Property notes>		

Page 1

50. Report Writer (FormConnect Pro+)

- After entering your text and field variables, tap on the Preview button to generate the report.
- You can also tap on the [Records](#) button and select a different record.


Report Writer

5:00 PM Fri Oct 14 *** 49%   [EDIT](#)

[Records](#) [Preview](#)

Tenant Deposit Issues - Check out Report

57 White Croft Works, Furnace Hill, Sheffield S3 7AH



Report Details			
Client:	Sheffield City	Inspection Date:	2020/10/06
Inspector:	Mark Turner	Inventory Date:	2019/09/12
Comments			
Description:	1 bed furnished apartment		
Note:			

51. Mail Merge (FormConnect Pro+)

- You can also reference field names from your form when configuring the Auto Export setting.

The screenshot displays the Form Designer interface for a 'Job Safety Analysis' form. A modal window titled 'Auto Export' is open, showing the following configuration:

- Export Method:** Email
- Formats:** ☐ FMC, ☒ PDF, ☐ CSV, ☐ XML, ☐ HTML, ☐ JSON
- Subject:** Job Safety Analysis for <Name> on <Date>
- Message:** Please review the attached job safety analysis for <Customer Site>
- Recipients:** support@formconnections.com (one per line)

The background form, titled 'JOB SAFETY ANALYSIS', includes fields for Name, Customer Site, Job / Task, Work Area, and Date. It also features a 'Team Member' section with a table for listing crew members. At the bottom, there is a section for the Supervisor/on-site lead technician (signature) and Date, followed by a disclaimer and instructions.

51. Mail Merge (FormConnect Pro+)

- When you export the form, the mail template will merge your field content directly into the email template.

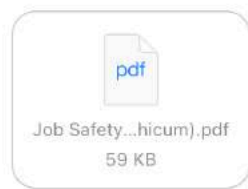
Job Safety Analysis for Jody Linthicum on 2022/10/07

To: support@formconnections.com

Cc/Bcc, From: steve@formconnections.com

Subject: Job Safety Analysis for Jody Linthicum on 2022/10/07

Please review the attached job safety analysis for Elementary school WO#2798.



52. Querying the Database (FormConnect Pro+)

- A query can be generated from the form database.
- To initiate a query, tap on the Query Builder button.

3:56 PM Mon Oct 17

Records

Query Builder

Report Writer

Backflow Assembly Test Report

Customer Name	Cabaniss, Tom	Not For Use In Other Jurisdictions	PWS ID#
Service Address	6801 Northern Hills Dr. Texarkana, AR 75501		TX0190004 AR360

Type Assembly ☒ RP ☐ RPDA ☐ DC ☐ DCA ☐ PVB ☐ SVB

Manufacturer Model Size Serial # ☐ Containment

Febco 860 1 H22251 ☒ Isolation

Location Left side of house by A/C ☐ New Install

☒ Annual Test ☐ Replacement

☐ Irrigation ☐ Commercial ☐ Residential ☐ Industrial ☐ Fire

Reduced Pressure Assembly	Double Check Assembly
Check Valve #1 Held (RV+3): PSID	Check Valve #1 Held (>1):
Relief Valve Opened (<2): PSID	Check Valve #2 Held (<1):
Buffer (CV1-RV) (>3): 0 PSID	
Check Valve #2 Held (>1): PSID	
<input checked="" type="checkbox"/> #2 Shutoff Closed Tight	Water Pressure Information Fire Lines Only
	Supply Pressure After Assembly PSI

Pressure Vacuum Breaker

☐ Air Inlet Opened

☐ Did Not Open

☐ Check Held

☐ Leaked

Notes:

☒ Passed ☐ Failed Next Test Due on or Before:

I certify the above described backflow assembly was tested by me on this date using a fully functioning and calibrated test gauge. The information contained on this test report is accurate and complete at the time of testing.

Signature	Kevin Taylor Printed Name	Date
Taylor Lawn & Landscape Testing Company	6965 TWU Assigned Test Kit ID#	TX: BP0014074 AR: ATT902 Tester License #

52. Querying the Database (FormConnect Pro+)




- Select the fields in the database by tapping on them.
- Tap the [Run](#) button to generate the query.

The screenshot shows the 'Query Builder' interface on a mobile device. At the top, the status bar displays '3:56 PM Mon Oct 17' and '93%' battery. The app header includes a back arrow, 'Forms', 'Query Builder', and a 'Run' button. The interface is split into two panels. The left panel, titled 'Select fields to generate your query', lists various fields under 'PAGE 1'. The right panel, titled 'Selected Fields', shows the fields currently selected for the query.

Select fields to generate your query	Selected Fields
RP	Name
RPDA	Address
DC	Manufacturer
DCA	Model
PVB	Location
SVB	
Containment	
Size	
Serial	
Isolation	
New Install	
Annual Test	
Replacement	
Irrigation	
Commercial	
Residential	
Industrial	
Fire	
CHK1	
DC1	
RV	
DC2	
Buffer	

52. Querying the Database (FormConnect Pro+)

- Below is the result of all the records that match the fields defined in the query made above.

2:29 PM Thu Sep 15 *** 73%  Query Result  

Name	Address	Manufacturer	Model	Location
Cabaniss, Tom	6801 Northern Hills Dr. Texarkana, AR 75501	Febco	860	Left side of house by A/C
Cabaniss, Tom	6801 Northern Hills Dr. Texarkana, AR 75501	Febco	860	Left side of house by A/C
Calhoon, Lance & Angela	2 Bevell Place Texarkana, TX 75501	Febco	825Y	front of house, right side beds
Calhoon, Lance & Angela	2 Bevell Place Texarkana, TX 75501	Febco	825Y	front of house, right side beds
Capps, Stephen	5215 McNatt Ln. Texarkana, AR 71854	Wilkens	975XL	S.W. Corner of house
Capps, Stephen	5215 McNatt Ln. Texarkana, AR 71854	Wilkens	975XL	S.W. Corner of house
Carmeli, Lana	3504 Woodridge Dr. Texarkana, TX 75503	Febco	860	SE corner of house
Carmeli, Lana	3504 Woodridge Dr. Texarkana, TX 75503	Febco	860	SE corner of house
Carter, Paul	4707 Bradley Texarkana, AR 75501	Febco	880	S corner of house inside gate
Carter, Paul	4707 Bradley Texarkana, AR 75501	Febco	880	S corner of house inside gate
Chambers, Dennis	6515 Windy Hill Dr. Texarkana, AR 75501	Febco	860	front Bed
Chambers, Dennis	6515 Windy Hill Dr. Texarkana, AR 75501	Febco	860	front Bed
Cheever, Mary Lynn	3704 Wyatt Texarkana, TX 75501	Febco	860	Left of front door
				N.E. Corner of house

Total Results: 226

53. Barcode Data Field (FormConnect Pro+)

- A barcode is a new field that can be created and placed on your form.
- The barcode scanner can be invoked from the iPad or iPhone by tapping on the barcode symbol in the upper right corner of the field.
- After scanning the barcode, the numeric value and the barcode symbol will be entered onto the field on the form.

Sales Receipt Form

3:45 PM Wed Oct 19

Sale Receipt

Records (1)

Search

Acme Corporation

Sale Receipt

Customer: Acme Corporation

Barcode: 00684941 Product: Ground Cinnamon Price: \$3.99

Barcode: 00208291 Product: Garbanzo Beans Price: \$0.99

Barcode: 0884912105318 Product: Grape Nuts Cereal Price: \$7.99

Barcode: 9781119703648 Product: How to Rethink Marketing Price: \$39.99

Barcode: 00806169 Product: Olive Oil Price: \$12.99

Barcode: 00079952 Product: Raw Almonds Price: \$5.99

Barcode: 00957694 Product: Rice Orzo Pilaf Rice Price: \$7.99

Barcode: 0646670314810 Product: Sea Salt Price: \$5.99

53. Barcode Data Lookup (FormConnect Pro+)

- If you wish to link this barcode ID to a second form that contains all the product information, then create a **Products** form and add a record for each product item (e.q., beans, cereal, cinnamon, etc.).
- In the example below, the **Products** form includes a record for each product and includes the barcode ID, the product description, the price, and a product image.
- When you scan the barcode field on the **Sales Receipt** form, it will do a data lookup of the **Products** form and fetch the data.

Products Form

The screenshot displays the FormConnect Pro+ interface. On the left, a sidebar titled 'Products' shows a list of 21 records. The record 'Ground Cinnamon' is highlighted. The main form area shows the details for this record:

- Product:** Ground Cinnamon
- Price:** \$3.99
- Barcode:** 00684941
- Image:** A photo of a jar of Trader Joe's Organic Ground Cinnamon.

53. Barcode Data Lookup (FormConnect Pro+)

- To configure the linkage between these two forms, tap on the “[Record Lookup](#)” button.
- You will be prompted to select both the **Source and Target** Form and the **Source and Target** Fields.
- Both of these forms should have matching field names (e.g., barcode, product, price).

This screenshot shows the 'Form Designer' interface for a 'Sale Receipt' form. At the top, there are 'Save' and 'Close' buttons. Below them is a toolbar with icons for linking, user management, settings, and document management. The form layout includes a 'Billing' section and a 'Products' section. A context menu is open over the 'Barcode' field, showing options: 'Edit', 'Record Lookup', 'Select Multiple', 'Select All', 'Cut', 'Copy', and 'Delete'. The 'Record Lookup' option is highlighted.

This screenshot shows the 'Form Designer' interface with the 'Record Lookup' dialog box open. The dialog box has two columns: 'Target Form' and 'Source Form'. Under 'Target Form', 'Sale Receipt' is selected. Under 'Source Form', 'Products' is selected. Below these, there are two columns: 'Target Fields' and 'Source Fields'. The fields are mapped as follows:










Target Fields	Source Fields
Barcode	Barcode
Product	Product
Price	Price

The background shows the 'Sale Receipt' form with fields for Customer, Barcode, Product, and Price. The 'Products' form is also visible in the background.

54. Nested List (FormConnect Pro+)

- A nested list links two drop-down lists together. When you select an item in one drop-down list, it limits your choices to what can be viewed in the second down-down list.
- In the example below, two drop-down lists have been created; [Make](#) and [Model](#).
- When you select a car in the “[Make](#)” drop-down list (Toyota), only the cars that are linked to the Toyota model are displayed in the “[Model](#)” drop-down list (4 Runner, Avalon, Avalon, Camry, etc.)

12:56 PM Tue Oct 11 98%

Records         

Car Inspection

Car Inspection

Date: 08/10/2022

Year: 1982 ▼ Make: Toyota ▼ Model: Camry ▼

VIN#:

	P	F	R	NA
Alignment				
Pulling	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alignment Off	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brakes				
Noise	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pulsation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suspension				
Noise	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transmission / Clutch				
Hard Shifting	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Switches & Instr

Horn

Turn Sig

Hazard

Neutral

Other S

Brake V

Dash / C

Cigaret

Sun Visor Light

4 Runner

Avalon

Avalon Hybrid

Camry ☒


Camry Hybrid

Corolla

54. Nested List (FormConnect Pro+)

- The **Model** list is “**Linked to**” the **Make** list. This occurs by placing a tick next to the Nested List option and linking to the Make drop-down list.
- Then, to create the nested list, you drag the items from the left to the right.

Field name:


Font Size: pt 

Alignment: ☐ Left ☐ Center ☒ Right




☒ Display label ☐ Required field

☒ Copy field when cloning record

☐ Link Field

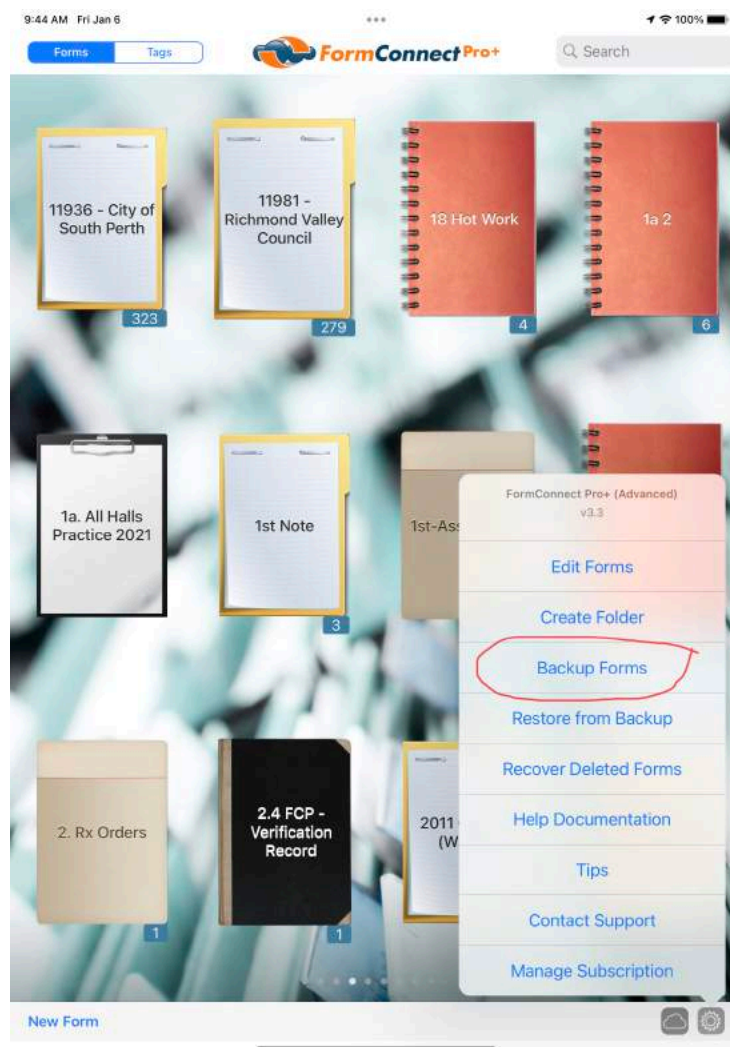
☒ Nested List Link to: 

Long press and drag Items from left to right to create the nested list

<input type="text" value="Q3"/>	X	Toyota	
<input type="text" value="530"/>	X	<input type="text" value="Avalon"/>	X 
<input type="text" value="Sienna"/>	X	<input type="text" value="Avalon Hybrid"/>	X 
<input type="text" value="Supra"/>	X	<input type="text" value="Camry"/>	X 

55. Local Backup

- All of your forms and records can be backed up locally to the iOS Files app or to a thumb drive plugged into your iPad or iPhone.
- The forms will be saved in a zip format to reduce the size of the file.
- Unzipping the file will import the forms and records into the FormConnect app.



- Note: Local backup is not a replacement for syncing of your forms to iCloud which also backs up your forms but syncs them to your other Apple devices and optionally to other FormConnect users.

56. Import Contacts from the Contacts App

- You can import your contacts from the Contacts app directly into any form.
- The only requirement are the fields on the form must match the field types in the Contacts app (first name, last name, company, address, email, phone number, etc.).
- You can specify to import all records or just individual ones.

The screenshot shows the '11981 - Richmond Valley Council' app interface. On the left, there is a list of records under the heading 'Records (279)'. The list includes items like '10 Stable Complex', '8 Stalls (Leo Clapham Area)', '8 Stable Complex', '7 Yards & Store', '6 Day Yard Building', '5 Stalls (Leo Clapham Area)', '5 Day Yard Building', '4 Stable Complex', '4 Day Yard Building - West', '4 Day Yard Building - East', '2 Yards (Galv Iron - Northern Mo...', 'Youth Hall', 'Workshop & Office', 'Works Depot', 'Woodview / Piora Hall', 'Woodchop Canteen', 'Woodburn CWA Hall', and 'Weighbridge Gate House'. On the right, the 'Bldg Data Collection' form is visible, featuring fields for 'Asset ID', 'Bldg Code', 'Date', 'Method' (set to 'Consumption'), 'Constr. Year', and various dropdown menus for 'Supports', 'Sub Struct Cond', 'Int. Walls', 'Super Struct Cond', 'Int. Doors', 'Ext Doors', 'Plumbing', 'Windows', 'Staircase', 'Floor Cov Cond', 'Ceiling', 'Fitout Cond', 'Roof Cond', 'Elect. Cond', 'Fire Serv', 'Hydraul. Cond', 'Mech Serv Cond', 'Fire Serv Cond', 'Motion Security', 'Possible Asbestos', 'Alum Grills', 'Solar', 'Steel Bars', 'Heritage', 'Cameras', and 'Sec. Cond'.

The screenshot shows the 'Contact Importer' dialog box within the '11981 - Richmond Valley Council' app. The dialog has a title bar with 'Cancel', 'Contact Importer', and 'Import' buttons. Below the title bar, it says 'Select the contacts you want to import'. A list of contacts is displayed, each with a radio button for selection. The contacts include: Apple Inc., Bill Leffer, Capistrano Mazda, Daniel Morse, David Sparks, Francis Lerner, Gene Newberry, Jane Doe, Joel Holtzman, John Henry, Larry Lerner, Marci Keller, Margaret B Sharpe, Mike Patel, Nita Helman (Dash), Peacock, Peter Schmidt, Rishabh Joshi, and Rob Bushway. At the bottom of the list, there are 'Select All' and 'Clear All' options.

57. 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.



Payment will be charged to your Apple ID account at the confirmation of purchase. Subscription automatically renews unless it is canceled at least 24 hours before the end of the current period. Your account will be charged for renewal within 24 hours prior to the end of the current period. You can manage and cancel your subscriptions by going to your account settings on the App Store after purchase.

58. iPhone/iPad/Mac Compatibility

- Forms created on the iPhone, iPad or Mac can be shared between all three devices.
- The form will look identical but the user interface will look slightly different as the screen size will vary depending upon the size of the device.

Records

Audit Checklist

Trade Name: Abbey Cellars

Situation Address: 1769 Maraekakaho Road~HASTINGS 4120

EH No.: EH08/0074 PID: 112732 EHO: Mark McI

Contact: W & J Haworth Date:

Postal Address*: PO Box 8115~HAVELOCK NORTH 4157

*Correct? ☐ Yes ☐ No Category: FoodRegs

Insert correct address if applicable:

Category: Medium Activity Rating

Risk Rating: B Grading

Fee/ Instruction:

Exemption No: Peer review

OFFICE USE ONLY

CAR? ☒ Yes ☐ No

Date CARs are to be completed by?: Follow up date:

Other required completion dates?: Follow up date:

Overall audit outcome: Acceptable Unacceptable Non compliance

Page 1 of 35

Records

Abbey Cellars

Audit Checklist

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:

Postal Address*: PO Box 8115~HAVELOCK NORTH 4157

*Correct? ☐ Yes ☐ No Category: FoodRegs

Insert correct address if applicable:

Category: Medium Activity Rating: High

Risk Rating: B Grading: Very Good

Fee/ Instruction:

Exemption No: Peer review

OFFICE USE ONLY

CAR? ☒ Yes ☐ No

Date CARs are to be completed by?: Follow up date:

Other required completion dates?: Follow up date:

Overall audit outcome: ☐ Acceptable conformance ☐ Unacceptable conformance ☐ Non compliance

Page 1

Page 1 of 35