Quick Start User Guide

Getting Started

Welcome to doForms! This comprehensive quick start guide gives step-by-step instructions to get you started building forms, using templates, pulling reports, analyzing data and more. We've also packed in many other helpful tips and tricks from our mobile forms consultants to help you leverage additional features of which you may not have been aware – all to optimize your doForms investment.

Here's what you'll find in this user guide:

Building Your First Form

In this first section, we'll show you how to build, preview, publish and access a form using the Build feature on the doForms website. We've taken every step to make this tool as easy-to-use as possible, but should you need additional assistance, please do not hesitate to contact a doForms Mobile Solutions Consultant or Support. We will even build your first form for you for free.

Phone Support: (855) DOFORMS or (855) 363-6767
Live Chat: Simply click **Chat** in the top right menu of the Build page to open a chat box.

Create a New Form

To access the build page, first sign into your account on the doForms dashboard using the link in the top menu of the homepage. From there, select the **Build** drop down menu in the top of your screen, then click **Forms**.

This will take you to the form building workspace. Finally, click the **New** icon in the top toolbar menu to get started. You can also load a sample form. Find features you like in the sample form and then easily look at how that is accomplished using the tools and various tool parameters.
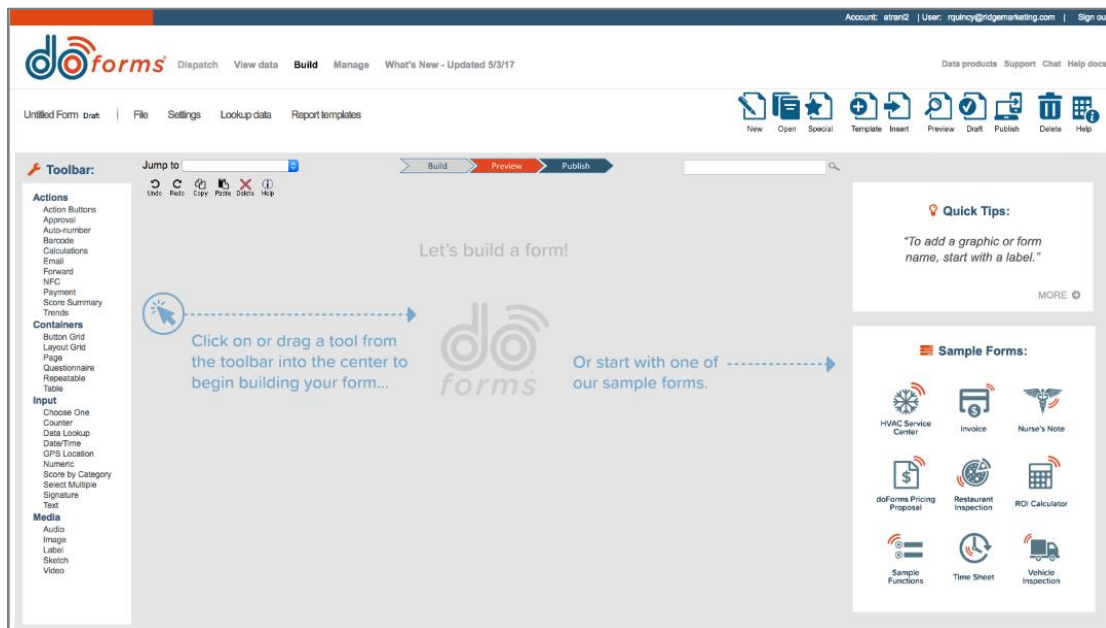
The Build Forms workspace

Left - Toolbar
Add new fields to your form by clicking and dragging items from the toolbar into the center workspace.

Center - Workspace
Add, delete, replicate or reorder tools and fields here. The quick links at the top of this section will help with functions like copying and pasting fields, deleting items or undoing and redoing prior actions. You can also use the icons in the top right of each tool to move it up or down on your form, make a copy or delete it.

Right – Parameters
Once you drag a tool to the workspace, the right menu will display configurable parameters associated with that particular tool, with a red star indicating required fields. Most tools will require at least a caption and data name.

Additional help is available by clicking the information icon.

You can break your form into pages to make navigation easier for the user. Breaking forms into pages also improves performance when your forms have a lot of calculations or hidden fields waiting to be displayed.

Use Layout Grids to place items in multiple columns and rows and use tables to quickly build invoices and time sheets. Use Data Lookups to add your own data into your forms. Finally, personalize your forms by adding pictures, GPS Stamps and all the other options that make your doForms so much more powerful than paper. All of these are accessible in the left column menu of the build workspace.

Preview Your Form

When you're ready to see what your form will look like on a device, click the **Preview** icon in the top toolbar menu.

> **Pro Tip: Fix all errors before previewing**
>
> If there are required parameters that need attention, doForms will provide you with a red error message for that item in the center section. You can easily navigate to each item that has an error by using the jump to option and selecting next error.

In the preview window, use the **Pages** icon located in the top menu to jump to different pages within your form, or the **Setting** icon to adjust the preview settings. Here you can opt to preview your form in device mode or in paper mode,
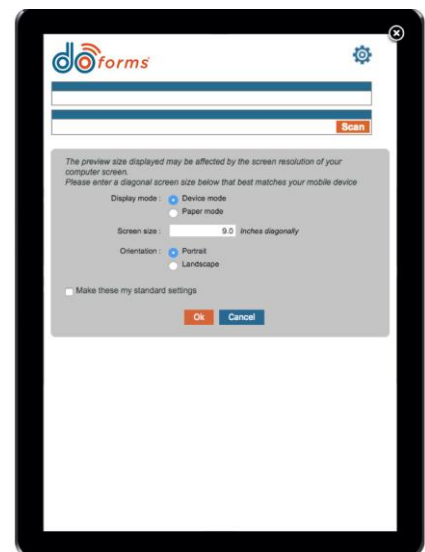
change the orientation and/or adjust the screen size to accommodate different devices. Settings can also be saved as your default for previewing forms in the future.

> **Pro Tip: Preview using multiple device size settings for consistent results**
>
> Because of varying screen resolutions on desktop monitors and on mobile devices, try a few different settings to ensure your preview matches your target device.

Publish Your Form

While working on your form, save it as a draft so you do not lose any progress. Once you are pleased with your form and are ready to distribute it to your users, click the **Publish** icon in the top toolbar menu and enter the name of the form in the top field.

Next, select a **Project**. Projects allow you to group forms for easier access and reference. Forms can be placed into multiple projects and can be assigned to users by assigning them to a project.

> **Pro Tip: Main Project user assignment**
>
> It's recommended you do not give users access to the **Main Project**, as this typically is where your work-in-progress forms are stored.

> **How to: Create a New Project**
>
> To add a project, click Manage in the top menu, then Projects. Click the Add Project Button or, in the Main Project dropdown menu, click the arrow to select Add Project. Give your new project a name and add a description.

Next, you can opt to customize your form's display icon and edit the icon text if you would like to give your form a shorter description. Icon text appears under your form icon on your user's form menu.

Then, create a **Record Name**. Record names allow you to quickly identify a form based on information entered into the form versus the form name.

> **Pro Tip: Always create a Record Name**
>
> Imagine you dispatch three jobs to a mobile worker. Without a Record Name the list would simply display the form name three times. With a Record Name, the list could contain the company name, address, start time and any other relevant information that would have been entered when the form was being dispatched.
>
> Record Names can be used to save PDF files or in email subject lines. Forms can also be referenced by their Record Name several places within the doForms application.

Now click **Save** and your form is published. Any user that has access to the project your from was saved into will see this form the next time they start doForms or after they manually update.

Using Your Form

Your doForms form can automatically resize itself to fit in whatever environment in which you are using it. It can be opened in a browser on your desktop if you have Internet access or, after downloading the mobile app, it can be used on your IOS or Android devices even if you do not currently have Internet access.

The doForms mobile app can be downloaded from the mobile app stores for IOS and Android users. Windows users can use doForms online by going to the following website http://www.mydoforms.com/webclient. Each doForms mobile user must have a doForms license with a valid user ID and PIN.

Please note that sharing a User ID and/or PIN is a violation of our end-user license agreement (EULA) and doing so will result in access revocation for your entire account. Before sharing login information, please contact a doForms support team member for assistance in registering a new user.

You can also send doForms to non-licensed customers, third parties, suppliers, contractors and more. doForms can even be embedded into your website. Forms that are emailed, hyperlinked or embedded into your website *do not require* the user to have a license. For more information, please refer to the section below: Sending Forms to Users Without a License.

Using Your Data

Once forms have been filled out and submitted, the data collected is stored in the secure doForms cloud. Here it can be viewed, downloaded or edited at any time by any employee with proper access privileges. Read on for help accessing, viewing and exporting your data for actionable insight and real-time reporting.

View Your Data

Still signed into your account, click the **View Data** option at the top menu.

Then, select your Project, Form and desired Date Range. The system will populate your screen with all the forms that match your criteria. You can preselect which fields in your

form you want to display and you can further sort and filter these results to help you narrow in on the form you would like to view or edit.

Keep in mind that doForms has many levels of security and privilege. Access rights can be defined when setting up a user's role. Forms can also be configured to determine which users can edit fields within a form. For example, you can build a form so that a dispatcher can enter a work order number but a mobile user can only view this field because for them it has been configured to *Read Only*.

View Data has options for viewing and editing your forms, exporting your data, importing data, viewing forms on a map, printing forms, forwarding forms and emailing forms.

Pro Tip: Web portal access

To change the access settings of a web portal user, a doForms manager or administrator can select the Manage dropdown menu at the top of the screen and then select the Web Users option. From here they will be able to add, edit and delete users, set user privileges, restrictions, user-specific settings for time zones and other individual settings.

View Your Data with Excel

doForms Excel plug-in places doForms directly into your Excel menu. Click here to download. To connect to doForms simply enter your account, username and password.
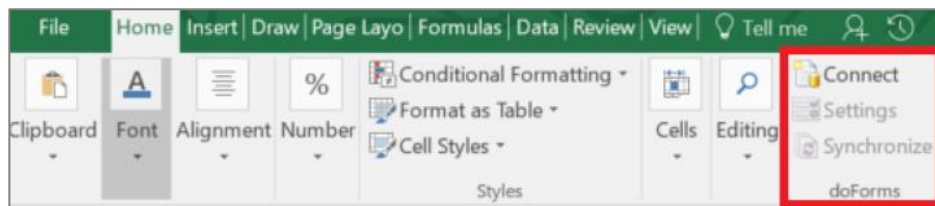
The menu of the doForms Excel plug-in.

Next, choose your Project and Form and select the fields to load. Once you are done, hit the **Synchronize** button and doForms will load your form data into Excel. Each time you hit the **Synchronize** button doForms will retrieve all your data submitted since the last time you synced.

Additional Options

We're always looking to provide additional opportunities to leverage your forms and data to improve your customer experience and your bottom line. To take advantage of any of these additional, optional configurations and features, please contact your doForms Mobile Solutions Consultant to learn more.

Access and integrate your data with **Sync & Save.**

Sync & Save makes downloading your data and integrating with your existing systems simple. With over 30 pre-built connectors available and the features needed to easily communicate with almost any system, Sync & Save can have you sharing data with your accounting system, CRM or database in just a matter of minutes. You can even use Sync & Save to keep all off your data up to date in your forms. No more outdated price books or equipment lists. Sync & Save is a Windows based application that runs at the customers location or it can be hosted for a fee.

Access and integrate your data programmatically. doForms has a full suite of bi-directional **Web Service APIs** available.

Analyze your data using **Enterprise Server (ES).**
ES is based on Microsoft SQL Server and can be located on-site or hosted for a fee. ES can analyze your form and automatically create a table for you in SQL Server. You simply set up a synchronization schedule and ES will start automatically downloading your data for you populating your SQL Server database. ES has a web user interface for viewing data, but most ES users prefer to use tools like Microsoft Power BI to build extensive dashboards and perform in depth data analytics.

Managing Users

There are three user types in doForms: Mobile Users, Web Portal Users and Non-Licensed Users. Mobile and Web Portal users each require their own doForms license. Non-Licensed users can submit forms using their browsers and credits are deducted from your account on a per use basis.

Mobile Users

To view and manage your mobile users, click on Manage and then select Mobile Users in the top menu. When the screen loads you can choose to see all users, search for a user or see all available/unassigned rows. Click on all available and you will see one line for each mobile license you have purchased that has yet to be assigned.

You can edit the rows and add the users name, mobile number and PIN. If you enter an email address, the system will email the user with instructions on how to set up their mobile device to use doForms along with the information they will need to sign in. At the same time, you can select which projects a mobile user will be able to access and download. Mobile users can use IOS or Android devices. They can also login using the web client: http://www.mydoforms.com/webclient. *Each user must only use a single access method. Switching devices or between a device and the web client will trigger a sharing violation.*

When logged in, each user will be presented a menu of accessible forms. To configure the mobile menu, click on Manage and select the Account Settings option. You will see two

options under Mobile: The first will allow you to configure the appearance of your menu and the second will allow you to centrally manage the behavior of doForms on your mobile devices.

Web Users

Click on Manage and then select Web Users to access and manage these users. Once again, you will be provided a row for each web license you have purchased. Edit one of the rows to configure the Web User options and settings. From here, a manager or the administrator of your account can configure what functions to which a user has access and can configure what data they can or cannot access.

Here you can set start-up rules and even preload forms to save time when they log in, easily create Dispatcher roles, Form Builder roles or any combination of roles as is appropriate. Please note that sharing of User IDs is not permitted. The system will automatically log-off an existing user if another user logs in with the same ID and the action may be considered a violation of our end-user license agreement (EULA).

Sending Forms to Users Without a License

doForms can be embedded in a website, emailed to people and used as hyperlinks in documents, spreadsheets and presentations. This allows doForms to be extended to all of your office employees, customers, partners, contractors, suppliers and more.

doForms dispatch portal will change status when recipients open and complete the form, respectively. You can also use **Fill & Send** to send invoices, quotes, NDAs and proposals to customers. After they submit the form, doForms can automatically email them a receipt, update your accounting system and place the order with your warehouse. You can even have a mobile user forward a form they are working on to a customer for them to approve and sign, then have the form automatically return to the mobile user.

Here's how it works: With the doForms credit model, anyone in the world can submit your form – whether or not they have a license. Each submission costs one credit – it's that straightforward. Simply purchase a block of credits and doForms will handle the rest. You can even have your credits auto-replenish to ensure you never skip a beat.

Dispatching Forms to Users

When you purchase or upgrade to doForms **Dispatch** you gain the ability to dispatch forms to specific workers and email addresses, forward forms automatically to other workers and email addresses, retrieve previously submitted forms and track mobile devices as they move from place to place.

Track forms easier with **doForms Dispatch**.

Dispatch

The standard dispatch screen allows you to simply dispatch any form you have created. Each job is located in its own row and each job has a status that will automatically change as the status of the job itself changes. Dispatched forms are not visible in the View Data section until they are returned as completed.

You can manually upload job data and view any jobs that have been programmatically uploaded or uploaded using Sync & Save.

Pro Tip: Create custom real-time status messages in your form

When building a form, you can add Action Buttons via the left column tool menu. An Action Button can send a fixed or custom status message in real-time to the portal. Create an Action Button that sends static text like *Arrived* or *Need Parts* or send custom text typed in by your user like "customer wants to talk to a sales person".

Dispatch Scheduler

The Dispatch Scheduler is a calendar-based view of your dispatched jobs by employee. When dispatching using the scheduler, you are required to provide a date, start time and estimated job duration so that the job can be correctly placed in the schedule next to the appropriate person.

Each job is color-coded and will change colors as the job status changes. You can set the different status colors in the Settings area. You have the option to filter jobs by status or view the status history of a specific job. Jobs can be configured to send immediately or on the scheduled date and you can configure jobs to repeat automatically at a preset interval.

GPS Tracking

doForms can track IOS and Android devices sending location data at a predefined interval. Your user does not have to have doForms loaded on the mobile device as doForms will

auto start the program in the background. The program is able to track a device but will only send location data when it detects a new start or stop moving event. Tracking can be configured so that it does not track devices on pre-determined off hours, such as weekends or week nights, depending on the schedule of the employee. Please be aware that tracking frequently may impact the battery life of a device.

Building Reports

doForms provides a simple-to-use report builder for consolidating your form data into reports and then distributing them to multiple people on a scheduled basis via email.

Create reports of your data for greater actionable insight.

After signing into the portal, select the Build dropdown in the top menu, then click **Build Reports** to get started.

Pro Tip: Build a form optimized for reports

Keep in mind that the report builder can only be used with certain fields in your form. You cannot use data in repeatable sections and you can only use data from one table within your form for each report. Most other fields within your form that store a single piece of information such as text, numbers or dates are available for reporting.

Filtering, Sorting and Grouping

Filter your data by date then by other criteria such as region, product line or whatever else is relevant to your company. Select how your report is sorted and then set groups to break your report into sections based on data in a specific field.

Scheduling and Emailing Reports

Once your report is defined you can set a date range and export schedule. For example, you can schedule a report to pull data from forms submitted in the last 7 days or during the last month and then automatically email the report to selected employees on the first of the month at noon, or every Monday morning – whatever you require. Report builder works great for timesheets, sales activity reports and for revenue reporting by region or sales person. Each scheduled report will debit a single credit from your account. Get 100 free credits by providing a case study once you become a happy customer. Free credits are also offered for customer referrals.

Creating Custom Form Templates in Excel

When you need your end result to replicate an original paper form for compliance reasons or to satisfy a customer requirement, doForms lets you exploit the power of Microsoft Excel to build a custom template. *Ask how you can build Microsoft Word templates in Sync & Save.*

Load Your Fields into Your Template

Once you are finished building your form, select Create Report Template from the File menu in the Build Forms section to create a template.
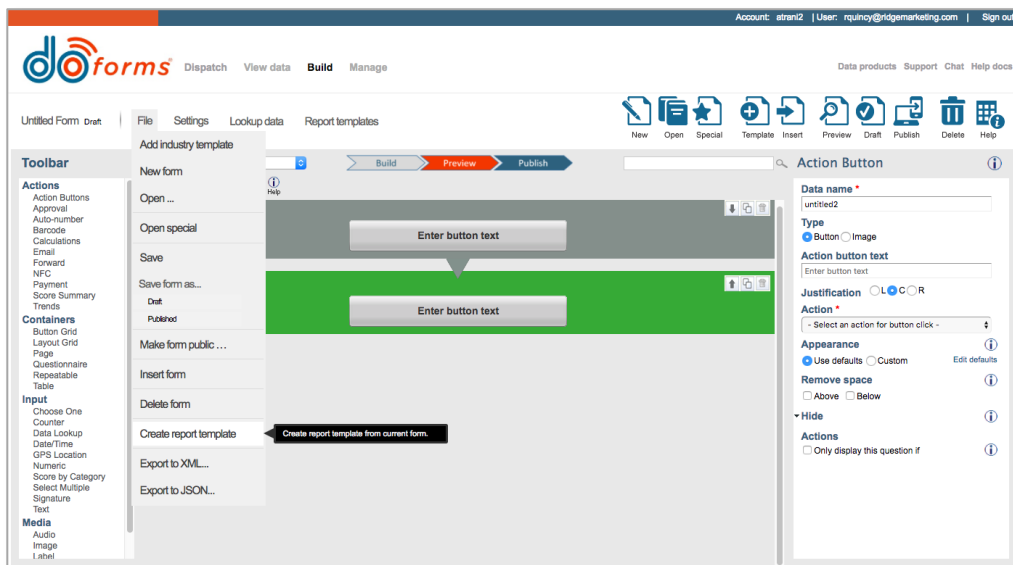
Select Create Report Template in the File menu to create a custom form template.

This will place all of your form captions and data names into an Excel spreadsheet for you. You will notice that each data name is surrounded by { }. doForms will automatically replace your {data_names} with actual form data. For example, {Customer_Name} will be replaced with *Joe's Tow Service* when you ask to print or email a form using an Excel template.


Creating a form template in Excel.

Now all you have to do is configure your template to look how you need it to look. You can even add charts and graphs, additional calculations or any other option available within Excel. You can even use your existing spreadsheets. Just replace your empty cells with {data_names} and save your spreadsheet as an Excel Template.

Save and Upload Your Template

Once you are finished creating your template, save your document as an Excel Template. Then in the **Build Forms** section of the doForms portal, select **Report Templates** from the menu.
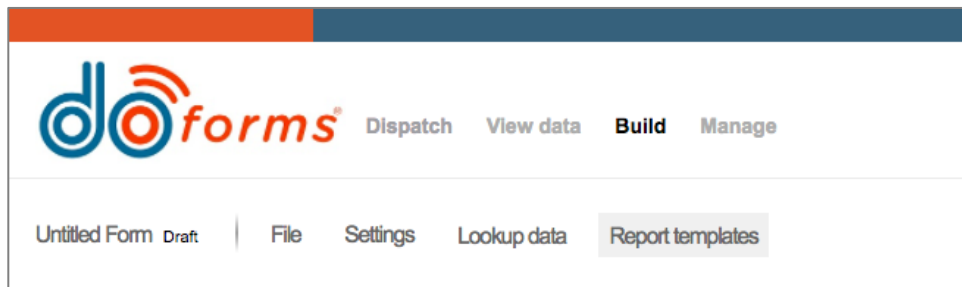
Select Report Templates to begin uploading and using your Excel template.

This will open a Manage Reports Templates popup window. Once there, select **New** to upload your Excel Template.

Pro Tip: Using a template

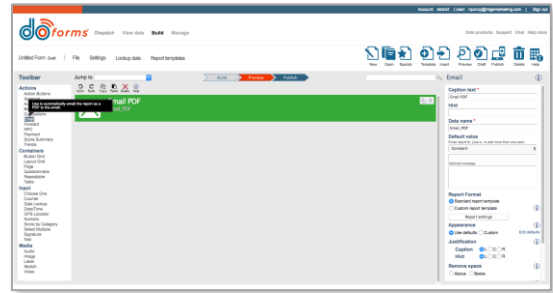When building your form, you have the ability to configure the form to automatically send an email based on your template when it is submitted. With doForms you can create multiple custom templates and have one form send different templates to different people. Send an invoice to your customer, a repair order to your shop and send a status update template to sales. All from the data collected in a single form.

Email Tool

As you build a form, you can add one or many email tools. Once the form is submitted, doForms will email either our standard PDF which looks just like your form or the Excel template you created.

After you have dragged and dropped the Email tool from the left toolbar into the center build area, look to the parameters menu on the right side of the screen and locate **Report Format**. Here you can select between the standard template or a custom report template. Simply click **Custom Report Template** and then choose the correct

Add the Email tool using the left column menu in the build workspace.

Excel template from the dropdown. You can choose to have the form sent as either a PDF file or as an Excel spreadsheet. Use the Only display if option to pick and choose which emails get sent.   You can configure the email tool to only send an email if the answer to a question satisfies your requirement.

Emailing from the Portal

Once a form has been submitted and saved in the doForms cloud, you can access it from the portal in the **View Data** section located in the very top menu of the portal. Once you select the form you want to email you can choose to send it using the standard format or you can use your Excel template.

Bonus Tips

It's easy to create simple forms with doForms, but with a little extra knowledge you can create powerful forms that perform more like a super expensive mobile application.

Using Barcodes and NFC

Did you know that with doForms it's easy to scan barcodes and read NFC tags?

Select the Barcode or NFC tool from the left column Toolbar and drag it into your form. The user will be provided a button to start the scan or read process and, when done, the results will be placed in to the field in your form.

If your barcode or NFC tag will contain multiple pieces of information, simply create fields in your form to hold this information and then use the tool to parse the scanned data and break it up into the fields you designate. For example, you can give your employee an NFC tag on a keychain that contains their name, employee ID and store number. Once they scan their tag, the form will automatically populate this information into the correct fields.

Using barcodes and NFC tags with data lookups

With doForms you can place barcodes or tags onto assets, products, locations and more. Upload a file that contains the code along with relevant data, such as descriptions or prices. Then, instead of using a dropdown list, you can configure the data lookup tool to use the value scanned in the barcode or NFC to find the correct item in the list. For example, if you have a price book containing the barcode ID, product description and price then you can scan the product sold and have the description and price auto-populate additional fields in your form.

Auto Numbers

For easier reporting and governance, doForms can generate a unique number for each form using a combination of dates and times. You can also submit a form and have doForms assign the next available number before the form is saved or emailed. This allows you to continue using any existing paper-based numbering schemes. Simply tell doForms the number of your last paper form and doForms will start applying the next number incrementally to each form submitted.

Action Buttons

Action Buttons allow you to save and submit your form, navigate within your form, launch websites/videos and/or other applications. You can also get driving directions or autodial phone numbers. You can upload your own button graphics and you can use the Button grid to layout buttons creating custom menus right within your form.

To add them to your form, simply drag and drop the **Action Buttons** tool during the Build Forms stage and use the parameters menu to customize the button.

Credit Card Payments

doForms has partnered with PROPAY to offer our customers the ability to securely accept credit cards. Simply add the **Payment** tool into your form during the Build Forms stage and tell it which fields to use for the amount to charge and other key data.

Once the user hits the *Pay Now* button on the form, doForms will pass control and data to the PROPAY mobile app or to the PROPAY web app. On mobile, simply swipe the card and look for the message telling you the transaction was successful. Hit the done button and it will bring you right back into your form.

If the person filling out a form is using a browser, a pop window will appear. Simply fill in the required information and the card will be charged. This is a handy feature when sending invoice forms or event registration forms where you would like customers to register and

pay at the same time. Use this with embedded forms on your website and turn any web page into an ecommerce page.

You must sign up for a PROPAY account and pay an annual fee to use this service. Please contact your doForms representative for more information.

Your Default Colors

In the Build Forms section under settings click on Form Appearance to set your default color scheme.

You can set default colors for a single form or you can choose to maintain a scheme for all of your forms. If you change your scheme while working on a form, that change will be reflected in that form but will not change forms that have already been published. Each tool has the option to override the default settings.

Additional Logic in Your Forms

doForms have the powerful features you need to convert your forms into mobile applications. Electronic forms that simple allow you to collect data tend to be not very user friendly and often don't function any better than the paper forms they are supposed to replace. To create a form that saves your users time, reduces errors and is easy to use and understand you need a tool that can take your form to the next level.

Only Display If

Hiding fields in your form until needed makes doForms extremely user-friendly. Use the Only Display If option to hide entire sections of a form or just a single question. For example, you may have a question that asks if an item was damaged with possible answers being *Yes* and *No*. You can add the Image tool to your form and select the Only Display If option. Set the parameters so that if the answer to the Is there damage question is equal to Yes then display the image field. Now if a user selects Yes there was damage the system will unhide the image field. You can also configure the system to make this image required to insure you capture the valuable information you want to collect. You can use this parameter to trigger emails, forwards and even make fields become entered into calculations. Let's say you have a numeric field called OT fee with a default value of $100. Now you have a calculation that adds travel fee, labor fee and OT fee. Add a choose one question such as, "did you go into overtime". Then set the only display if parameter of the OT fee to Only Display If the answer to overtime is equal to Yes. This will cause the calculation to include the $100 overtime fee.

If Then Else

Create a Choose One called State where you give the options NY, NJ, CT. Now add a Numeric field called Tax Rate. Select If Then Else and set the parameters as follows. If the answer to State is Equal to NY then 8.75 else if the answer to State is equal to NJ then 7.5 else 6.5. You can use this option in tables and hide the column to count Yes or No answers, Pass or Fail or any other items you may want to sum up. Then sum the hidden row and add a label that only displays if the sum of the hidden pass column is greater than 8.

Calculations

doForms can automatically perform any algebraic equation. You can perform complex date/time calculations and make complex text strings. With calculations, you can set fields equal to data parts and system variables such as Mobile ID. Embed calculations in tables and grids to create self-calculating invoices and time sheets. Eliminate user error and drastically reduce form completion time by adding calculations into your forms.

Message from the CEO

You will always have access to a real person to help you. We do not hide our phone number, make you feel bad for calling or try to charge you for help building your form.

We also realize that you are placing a large responsibility on us to support you as you become dependent on our technology to run your business. That is why you will always get a real and knowledgeable person to support you should you have a problem. In fact, it's my policy that any unhappy customer can be forwarded directly to me to ensure that they receive the care and attention they need.

I drive many of the priorities for what features and functions we add to the product and I use valuable input a receive from our customers to make those decisions. I review your feedback and I have spoken with many of our customers to determine what will help make their jobs just a little bit easier.

We have priced doForms to make it affordable and our goal is to help you eliminate inefficiencies in your organization by simply replacing your old manual paper based processes with the modern technologies that we all use every day to run our lives.

Thank you for trying doForms and please pick up the phone and ask for me if you have something you feel I need to know.

John A. Darienzo
Chief Executive Officer