



Sales Builder Pro



Managing Forms

Forms are currently available in two versions

1. **Quality Installation Checklist bundle** You can start with our professionally designed checklist bundle of three forms – **unitary, boiler and ductless** – then optimize each to fit the way you work. These forms include

- **Photo Capture** documents all aspects of the install – **unit placement, line runs and more** – eliminate sales rep to install team miscommunications.
- **Drawings** show exactly where everything needs to go – **no more guesswork** – for fast, accurate and complete installations.
- **Checkbox and dropdown lists** eliminate most typing – **get clear, legible, actionable data** – and, all the data you need, every time.
- **More** – choose from over a dozen question/answer types (see next page)



2. Custom Forms

- **Custom Forms** If you need something else please contact IMS. We can build custom forms to fit your needs or sell you blank forms and you can “Do-It-Yourself” – prices vary on number of forms, users and form length.

Getting Started

Manage Forms

- Go to your Management Portal.
- Use **Show Form** dialog box, select the form you wish to manage.

Manage Forms

Company: Form Builder Demo


Show Form:

Last Update: 5/5/2018 12:45:53 PM by Form Builder System Admin
















Edit Form

- Click on the edit icon (pencil) to open the Edit Form dialog box to change a form name.
- You can also change a form status (to Inactivate or Archive) on the Edit Form dialog box.



Manage Question Order

-  • **Drag-and-Drop** – use this feature to organize the questions sequence to match your workflow


Answer Type

-  • **Single-Line Text Box** – use when you expect a short answer
-  • **Multi-Line Text Box** – use when you expect a longer answer
-  • **Dropdown List** – use when you must have a specific answers
-  • **Dropdown List w/'Other'** – use when you expect typical answers but may have others
-  • **Switch** – use for questions with one of two answers such as **On/Off, Yes/No** or **True/False**
-  • **Check Box List** – use when the answer can be **ONE OF MANY** choices
-  • **Radio Button List** – use when the answer can be **ONLY ONE** choice
-  • **Take Photo(s)** – picture capture (may also be used to photograph paper drawings)
-  • **Drawing** – capture on tablet drawings (with or without a background picture)
-  • **Reference Image** – insert an image as a source of on-app information
-  • **Signature** – on app signature capture
-  • **Initials** – on app capture of initials
-  • **Date** – on app capture of a date
-  • **Time** – on app capture of time
-  • **Label** – insert text to explain your form or what data you need to collect

Manage Sections

-  • Add, delete, rearrange or edit Section names
-  • If the **Section** icon is grayed out, you need to **Save** your work
- Save** • Click to keep your changes in the cloud-storage

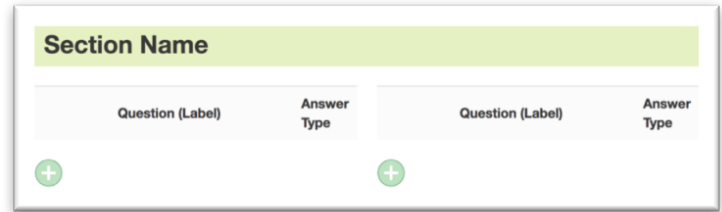
Edit

-  • Touch the pencil icon to make changes

NOTE: Use **Refresh Data** to immediately see changes on your tablet. Otherwise, changes GO LIVE on the next day that users open their app. This prevents forms changing during the work day which can be disconcerting for users.

Glossary

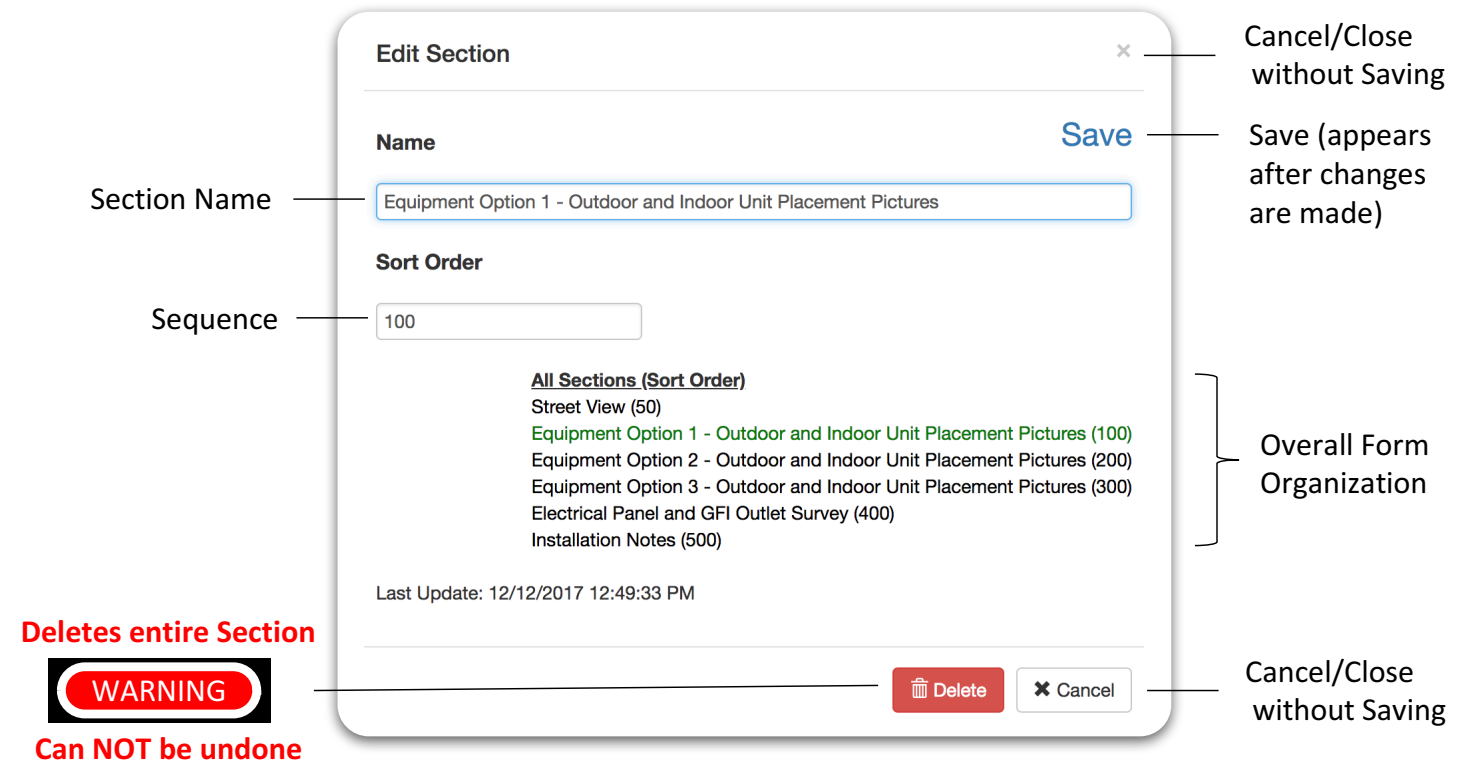
- **Form** – collection of Sections
- **Section** – collection of Fields
- **Sort Order** – sequence of Sections
- **Field** – contains the following
 - **Question (Label)**
 - **Display Name for Timeline**
 - **Required** checkbox
 - **Answer Type** – over a dozen kinds of formats
 - **Last Update** – date, time and user name to track change history
- **Required** – on the app, a user is prompted to answer Required questions
- **Timeline** – back-office tracking of when each question was answered
- **Display Name for Timeline** – used to label each question in the Timeline



Frequently Asked Questions

How do I edit a **Section** name?

- Move your mouse to the Section (green shaded area) you wish to change and click on the Edit icon (pencil) and the **Edit Section** dialog box appears



Section Name — Equipment Option 1 - Outdoor and Indoor Unit Placement Pictures

Sort Order — 100

All Sections (Sort Order)

- Street View (50)
- Equipment Option 1 - Outdoor and Indoor Unit Placement Pictures (100)
- Equipment Option 2 - Outdoor and Indoor Unit Placement Pictures (200)
- Equipment Option 3 - Outdoor and Indoor Unit Placement Pictures (300)
- Electrical Panel and GFI Outlet Survey (400)
- Installation Notes (500)

Last Update: 12/12/2017 12:49:33 PM

WARNING — Deletes entire Section
Can NOT be undone

Delete **Cancel**

Cancel/Close without Saving

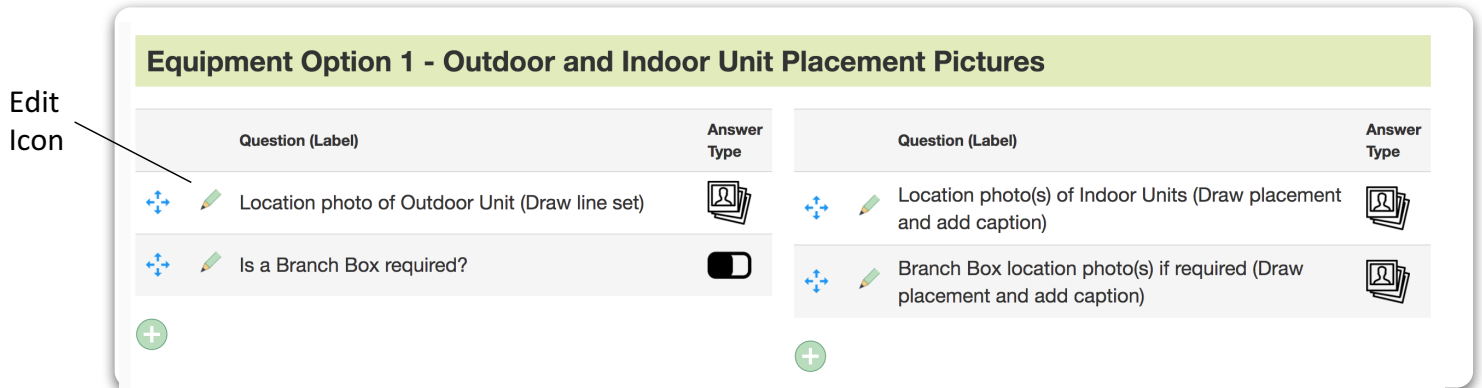
Save (appears after changes are made)

Overall Form Organization

Cancel/Close without Saving

How do I edit a Question?

- Click on the Edit icon (pencil) and the **Edit Section** dialog box appears



Equipment Option 1 - Outdoor and Indoor Unit Placement Pictures

Question (Label)	Answer Type	Question (Label)	Answer Type
Location photo of Outdoor Unit (Draw line set)		Location photo(s) of Indoor Units (Draw placement and add caption)	
Is a Branch Box required?	<input type="checkbox"/>	Branch Box location photo(s) if required (Draw placement and add caption)	

Edit Icon

Change Question

Change Answer

Edit Field ✕

Question (Label) Save

Location photo of Outdoor Unit (Draw line set)

Display Name for Timeline

Location ODU 1

Required

Answer Type

Take Photo(s) ▾

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Delete
Cancel

How do I add a Question?

- Click on the add icon (plus sign) and the **Edit Section** dialog box appears.
- You can add a question to either column and then drag-and-drop to the other column
- You can **NOT** drag-and-drop between sections

Add



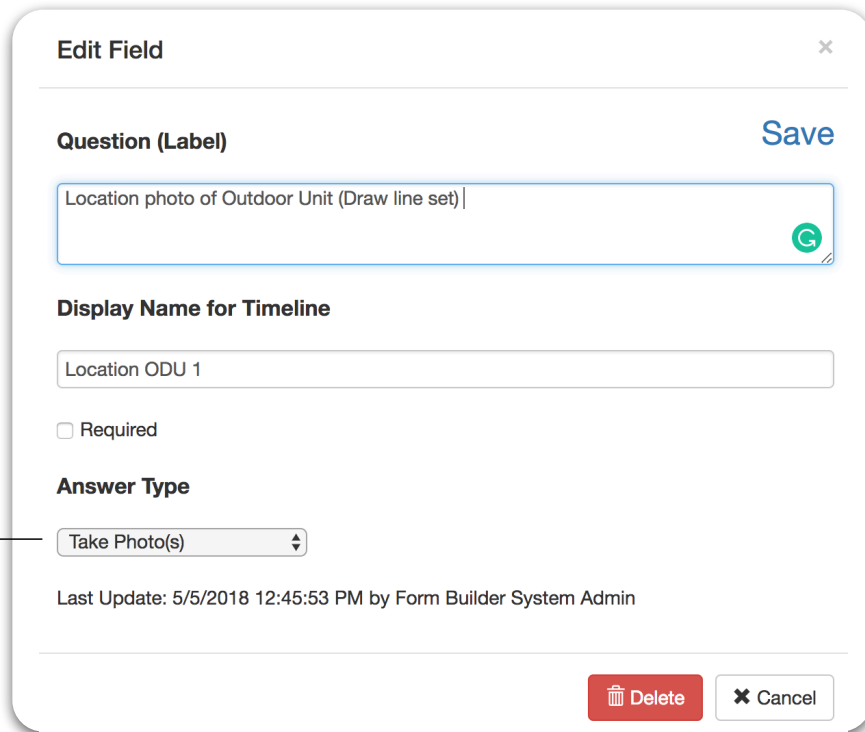
Section Name

Question (Label)	Answer Type	Question (Label)	Answer Type
+		+	

How do I edit an Answer?

- Click on the Answer Type selection control

Answer Type
Selection control



Edit Field [Close]

Question (Label) Save

Location photo of Outdoor Unit (Draw line set) [G]

Display Name for Timeline

Location ODU 1

Required

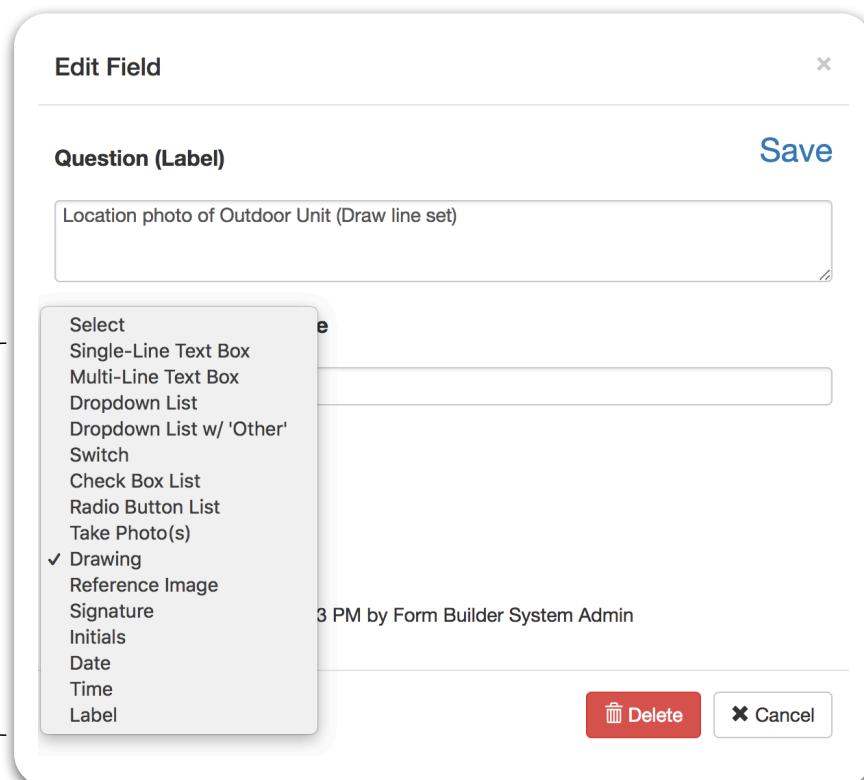
Answer Type

Take Photo(s) [v]

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[Delete] [Cancel]

Select a new
Answer Type



Edit Field [Close]

Question (Label) Save

Location photo of Outdoor Unit (Draw line set)

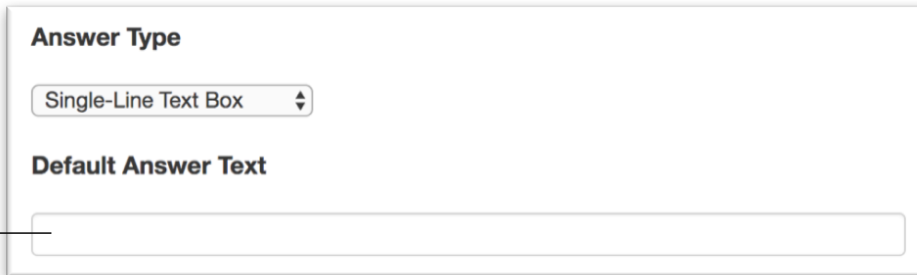
Select
Single-Line Text Box
Multi-Line Text Box
Dropdown List
Dropdown List w/ 'Other'
Switch
Check Box List
Radio Button List
Take Photo(s)
✓ Drawing
Reference Image
Signature
Initials
Date
Time
Label

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[Delete] [Cancel]

How does the **Single-Line Text** Box work?

- Designed for short answers, users just “fill in the blank” – alternatively you may provide a default answer



Answer Type

Single-Line Text Box

Default Answer Text

Optional

Best Practice – use this for Questions with unpredictable, random answers that require typing or dictation. If the answers often repeat use a drop-down list to eliminate most typing.

How does the **Multi-Line Text** Box work?

- Designed for longer answers



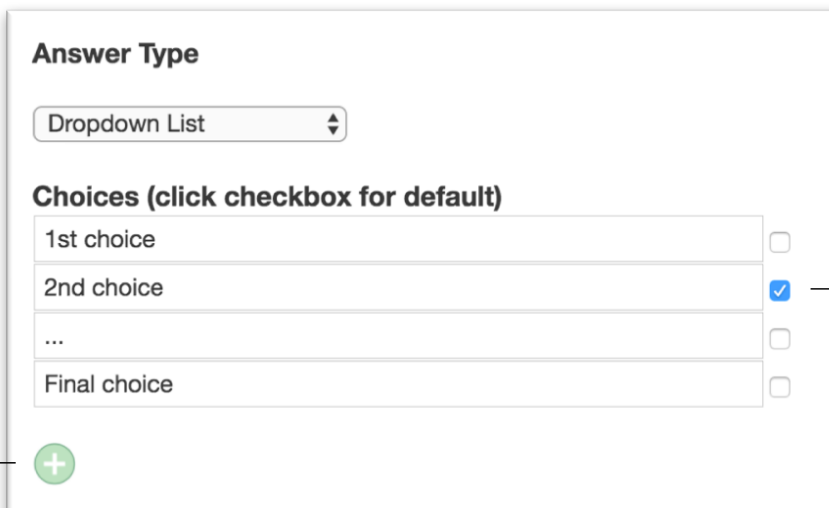
Answer Type

Multi-Line Text Box

Default Answer Text

How do the **Dropdown List** and **Dropdown List w/'Other'** Answer Types work?

- Designed for questions where there is a predictable set of answers
- The **Dropdown List** is fast (no typing) and accurate (no typos)
- Use the **Dropdown List w/'Other'** to give the user an option to enter a choice not available in the list



Answer Type

Dropdown List

Choices (click checkbox for default)

1st choice	<input type="checkbox"/>
2nd choice	<input checked="" type="checkbox"/>
...	<input type="checkbox"/>
Final choice	<input type="checkbox"/>

Add more answers

CAUTION

Optional default choice
Use with CAUTION. If a user FORGETS to answer, the default answer appears – that may not be correct!

What is the **Switch** Answer Type?

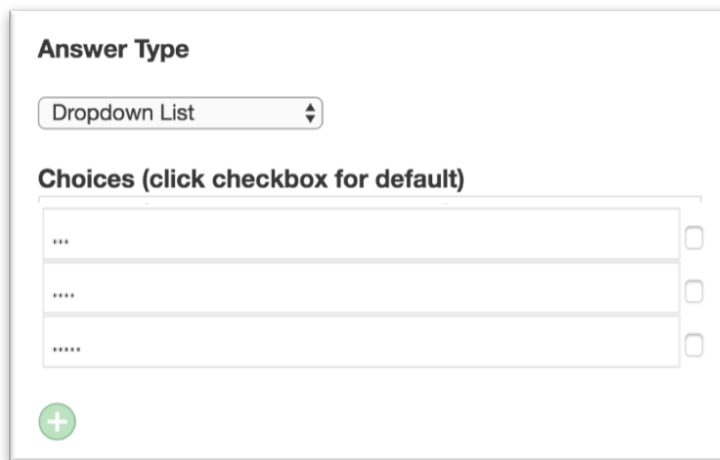
- The **Switch** Answer Type is used for On/Off type questions – hence the name Switch
- Typical On/Off labels include Yes/No and True/False
- As an option you can set the default to “On” label



Optional

How does **Check Box List** work?

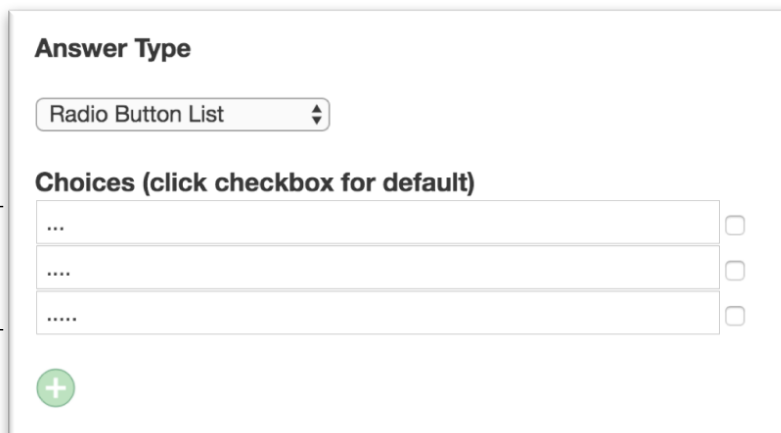
- Use a **Check Box List** when *more than one* answer can be correct



Multiple choice answers go here

How does the **Radio Button List** work?

- Use a **Radio Button List** when *only one* answer can be correct



Multiple choice answers go here

How does the **Drawing** Answer work?

- After you choose an Answer Type of Drawing and Save, a dialog box appears that allows you to optionally upload an image file (.png or .jpg format) that the user can use as a backdrop (illustration) for a drawing

Optional —

Answer Type

Drawing

Background Image

View Current Upload File

Choose File No file chosen

Upload

How does the **Reference Image** work?

- Once you change the Answer Type to Reference Image and click on Save an Image dialog box appears
- You can upload an image (.png or .jpg file format) that will display on the app
- A Reference Image is used to hold a picture (“worth 1,000 words?”) to assist the user collecting data
- Users can NOT draw on a reference image

Answer Type

Reference Image

Image

View Current Upload File

Choose File No file chosen

Upload