

## Forms

With IndusTrack, you can create a customized form that can be added to the **Task** of a Job and can be accessed by the Field Employee through the Mobile App and sign it with the Customer.

To access the forms page, go to **Settings > Form Settings > Forms**.

The forms page contains all of the forms that have been created and will be created in IndusTrack.

From this page, you will be able to view, create, edit and delete forms.

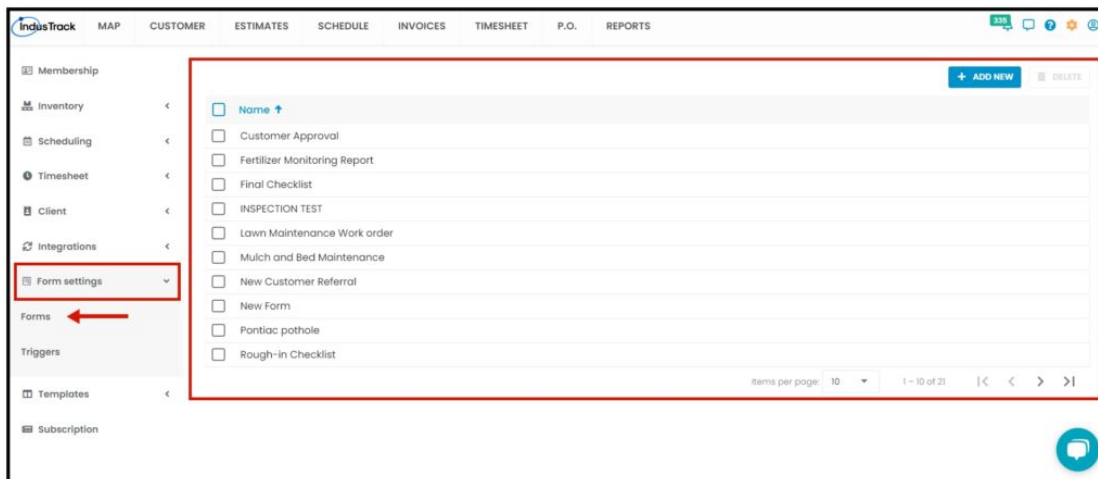
### Sort the Forms List Alphabetically

Click the Name column header to set the list according to the form name:

- Arrow up – Form names are arranged alphabetically from Z to A.
- Arrow down – Form Names are arranged alphabetically from A to Z.

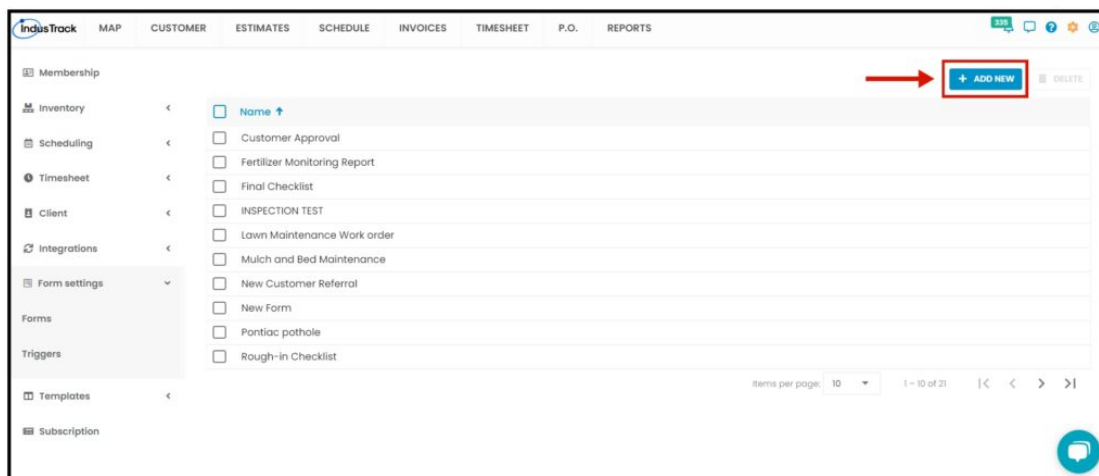
### Items Per Page

- Select the number of forms to be displayed per page. Options to choose from are 10, 25, 50, and 100.
- Use the side arrows to move from one page to another (if there is more than one page). If there is only 1 page, this feature is disabled.



## CREATE A FORM

To create a Form, click **+ ADD NEW**.



Name the form.

Form Name \*

Maximum length 50 characters

CANCEL SAVE FORM PREVIEW

Form Elements

Form Body

Header

Select the **Form Elements** to be used. Drag and drop these into the **Form Body**, according to the hierarchy that the form needs.

HVAC Maintenance

Maximum length 50 characters

CANCEL SAVE FORM PREVIEW

Form Elements

Form Body

Header

Name

Address

Toggle

Signature

Terms and Conditions

### Form Elements

- Single Line
- Multi-Line
- Number
- Name
- Address
- Phone
- Email
- Multiple Choices
- Toggle
- Image Load
- Drop Down

- Signature
- Group Header
- Terms and Conditions
- Date and Time
- Page Break
- Checklist
- Multi Column Text
- Job Number
- Customer Info

Click the Elements inside the form body and set the settings of each. Note that each element has its own setting.

Select, too, if the element is required to be filled or not.

The screenshot displays a form builder interface for 'HVAC Maintenance'. At the top, there are buttons for 'CANCEL', 'SAVE FORM', and 'PREVIEW'. Below the title, a note states 'Maximum length 50 characters'. The interface is divided into three main sections: 'Form Elements', 'Form Body', and 'Name Element Settings'.

**Form Elements:** A grid of 12 elements including Single Line, Multi Line, Number, Name, Address, Phone, Email, Multiple Choices, Toggle, Image Load, Drop Down, and Signature.

**Form Body:** A list of elements currently in the form: Header, Name, Address, Toggle, Signature, and Terms and Conditions. A red arrow points to the 'Name' element.

**Name Element Settings:** A panel for configuring the 'Name' element. It includes a 'Caption' field with the value 'First and Last Name' and a 'Required' dropdown menu set to 'No'.

Drag and drop the elements to rearrange them. Click the trashcan icon to remove the element from inside the Form Body.

Click on the **Preview** button to see what the form looks like.

Preview


IndusTrack Demo1

10700 W Highway 55

Plymouth MN 55441

06127464017

development@industrack.com



First and Last Name

First Name

Last Name

Address

Address

City

Country / State

Postcode / ZIP

☐

Toggle

CLOSE

**Save** the form.

HVAC Maintenance

CANCEL

SAVE FORM

PREVIEW

Maximum length 50 characters

Form Elements

Single Line

Multi Line

Number

Name

Address

Phone

Email

Multiple Choices

Toggle

Image Load

Drop Down

Signature

Form Body

Header

Name

Address

Toggle

Signature

Terms and Conditions

Name Element Settings

Caption

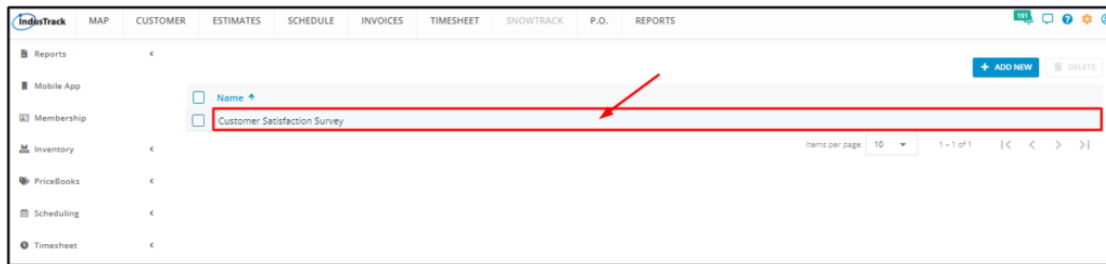
First and Last Name

Required

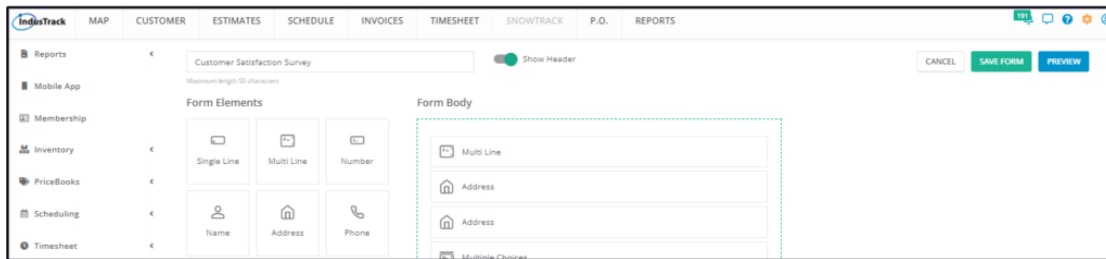
No

## EDIT A FORM

Click anywhere on the row of the form to be edited. This will open the form in edit mode.



Edit the form as may be needed. Save once done.

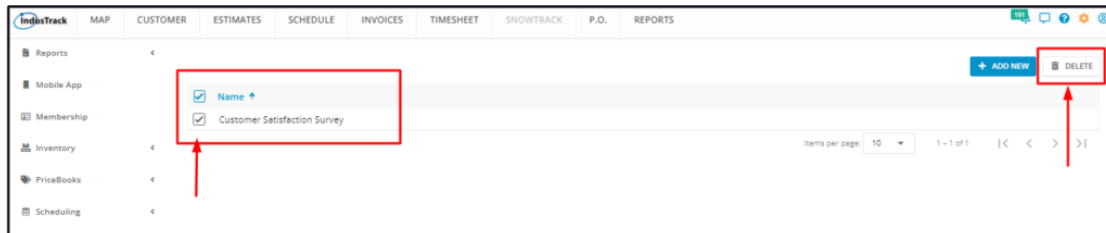


## DELETE A FORM

By default, the **Delete button** is disabled. Select the form to be deleted and tick the checkbox to its left. Click on the Delete button which will now be enabled.

To delete multiple forms, tick the checkboxes of these forms and hit delete.

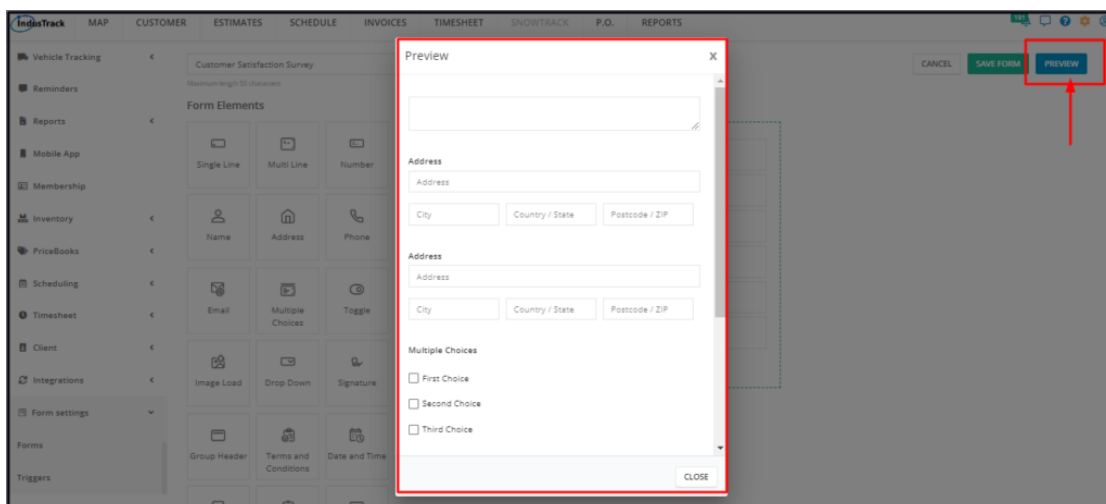
To delete all forms, tick the checkbox to the left of the Name header.



## VIEW A FORM

To view an existing form, click anywhere on the row of the form. This will open the form in edit mode.

Click on the **Preview** button to see what the form looks like.



**MORE ON FORMS**

Add [Triggers](#) to your forms to automatically have the forms completed when the trigger is activated.

Add a form to [Task Templates](#) so that this may be automatically added to a Job when the template is used.

---