Build a Basic V3 Estimate Form

SA6 Conference 11/7/19-11/8/19

This document shows you how to build and publish a basic two-page Estimate Form using V3 Forms.

Follow these steps for each page.

	Page 1
Estimate Request	Add the following fields:
* First Name	1. Header - change to say "Estimate Request"
	2. Divider
Last Name	3. Name
* Contact Email	4. Contact Email - map to Contact Email
	5. Divider
	6. Address - map to "Service Address"
* Address Line 1	
Address Line 2	
City	
State	
·	
Postal Code	

Service Autopilot"

Sources Vou Nood	Pa	age 2
Services You Need	Ad	d the following fields:
	1.	Header - edit to say "Services You Need"
	2.	Optional Image (or video) Add an image of your work (like a nice looking property) or a video showcasing your services
	3.	Divider
* Please Select one or more services that you're looking for	4.	Check box field
 Mulching Weekly Lawn Maintenance Fertilization and Weed Control Landscape Installation Shrub Trimming 		 a. Change the Checklist field label to say, "Please select one or more services you're looking for"
Do you have any special requests or questions for us?	-	 Add or remove checklist options and the names of the options to your services
	5.	Long Text Entry - Change the label to say: "Do you have any special requests or concerns?"
Back		

6. On the **Submit** button, make sure to turn on Captcha.

FIELDS EDIT	P CARACTER SETTINGS		
A• B I	U		
Next		* Please Select one or more services that you're looking for	
		🕑 Mulching	
		Weekly Lawn Maintenance	
BUTTON COLOR	#BD0404	Fertilization and Weed Control	
		Landscape Installation	
	#FFFFFF O	Shrub Trimming	
TEXT COLOR	#FFFFFF 0	Do you have any special requests or questions for us?	
BORDER RADIUS	- 4 px +	Enter text	
HEIGHT	- 30 px +		
САРТСНА		e	
Challenge-response test whether or not the user i		INCAPTCHA Back	Submit

Configure and Publish a Form

- 1. Optional: Add a notification for someone in your office to be notified
- 2. Account Management:
 - a. Choose whether you want Accounts to be automatically updated when the Form is submitted
 - b. Set Matching Criteria to the following (recommended settings but can be changed based on preference)

Update Options			
When a form is submitted by an existing ac	count, how would you like to update the acc	ount?	
Replace all existing fields and add new field	ds 🗸		
Account Matching			
When should a form response be matched	to an existing account?		
Other	~		
Strictness Identifiers			
Donec facilisis tortor ut augue lacinia, at vir SELECTED IDENTIFIERS Tags below will be added to the account.	verra est semper. Sed sapien metus, sceleris AVAILABLE IDENTIFIERS Select from the list of tags below.	que nec pharetra id	d, tempor a tortor. Pellentesque non dignissim n
(2) SELECTED IDENTIFIERS Rem	ove All Search Identifiers Q	Add all	
	 Last Name Service Address Line 1 Service Address Line 2 Service City Service Postal Code Service State 	ŕ	

- 3. Publish the Form to the **Website**
 - a. Select an option to publish: Hosted Form, Embedded Form, or Form Code

OR

b. Click the blue link to send instructions to your webmaster

Form Options			
Where will this form be publishe	d?		
Select where users will fill out this for	n.		
Website	Mobile	Office	Mobile and Office
Publish Form To Website Please choose an option below.			
Hosted Form	ndenendent landing nage. Clicking	Copy will copy the form's web addr	Сору
This option will host the form on an i			ess to your clipboard.
This option will host the form on an i Embedded Form			Copy
	t users. Embedded forms may be p	laced directly on your website. This	Сору
Embedded Form This option is recommended for mos	t users. Embedded forms may be p	laced directly on your website. This	Сору
Embedded Form This option is recommended for mos in Service Autopilot to automatically	t users. Embedded forms may be p rupdate your website.		Copy option allows updates to the form

Build a Basic V3 Survey Form

SA6 Conference 11/7/19-11/8/19

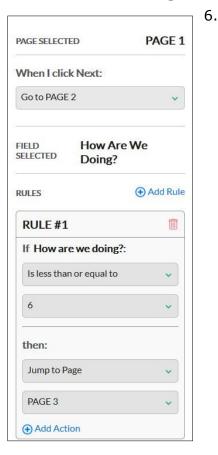
This document shows you how to build a basic Multi-Page Survey Form using V3 Forms.

Page 1

		lame		 				
w are we doing? Worst, 10 = Best	ast N	ame						
= Worst, 10 = Best	w are	e we doi	ng?					
0 1 2 3 4 5 6 7 8 9 10	Worst	72 						

- 1. Add the following fields to page 1:
 - a. Header
 - i. Edit Header to say, "Tell us how we're doing!"
 - b. Name
 - c. Rating
 - i. Edit Label to say, "How are we doing?"
 - ii. Edit Helper text to say, "0 = Worst, 10 = Best"

2. For Rules on the **Rating** Field enter the options as shown:



Page 2

Snap to this if user selects 7 or above in satisfaction

e would love to hear any feed	lback you have fo	or us!	

- 1. Add a Long Text Entry field to page 2
- 2. Change the label to say, "We would love to hear any feedback you have for us!"
- 3. Change the Rules:
 - a. Change "When I click Next:" to "Go to PAGE 4"

Page 3

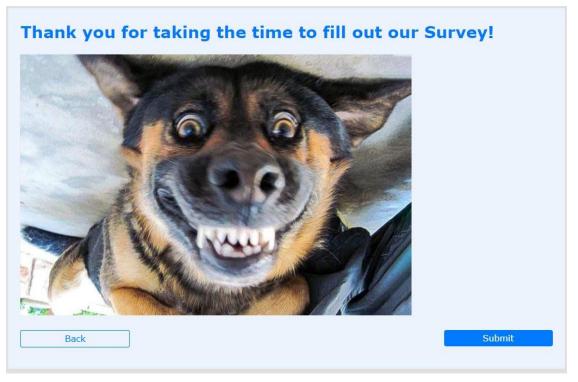
Snap to this if user selects 6 or below in satisfaction

ase ten us how	/ we can improve	e your experien	ice!	 	
Back					Next

- 1. Add a Long Text Entry field to page 3
- 2. Change the label to say, "Please tell us how we can improve your experience!"

Page 4

Submit



- 1. Add a Header field
- 2. Change the text of the Header field to say, "Thank you for filling out our survey!"
- 3. Optional: Add an Image field Choose a fun image you like, or your logo

Configure and Publish

- 1. Optional: Add a notification for someone in your office to be notified
- 2. Publish the Form to the **Office** and associate it to **Accounts**