Service**Autopilot**™

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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.

Estimate Request

* First Name

Last Name

* Contact Email

* Address Line 1

Address Line 2

City

State

Postal Code

Page 1

Add the following fields:

1. Header - change to say "Estimate Request"

2. Divider

3. Name

4. Contact Email - map to Contact Email

5. Divider

6. Address - map to "Service Address"

Services You Need

* Please Select one or more services that you're looking for

☐ Mulching
☐ Weekly Lawn Maintenance
☐ Fertilization and Weed Control
☐ Landscape Installation
☐ Shrub Trimming

Do you have any special requests or questions for us?

Enter text...

Back

Page 2

Add 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

4. Check box field

   a. Change the Checklist field label to say, "Please select one or more services you're looking for"

   b. 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?"

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

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 account, how would you like to update the account?

> Replace all existing fields and add new fields ⌄

Account Matching

When should a form response be matched to an existing account?

> Other ⌄

Strictness Identifiers

Donec facilisis tortor ut augue lacinia, at viverra est semper. Sed sapien metus, scelerisque nec pharetra id, tempor a tortor. Pellentesque non dignissim neque.

SELECTED IDENTIFIERS   **AVAILABLE IDENTIFIERS**

Tags below will be added to the account.   Select from the list of tags below.

(2) SELECTED IDENTIFIERS	Remove All
Last Name	✕
Service Address Line 1	✕

Search Identifiers 🔍   Add all

- ☑ Last Name
- ☑ Service Address Line 1
- ☐ Service Address Line 2
- ☐ Service City
- ☐ Service Postal Code
- ☐ Service State

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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 published?

Select where users will fill out this form.

Website	Mobile	Office	Mobile and Office

Publish Form To Website

Please choose an option below.

Hosted Form   `Copy`
This option will host the form on an independent landing page. Clicking Copy will copy the form's web address to your clipboard.

Embedded Form   `Copy`
This option is recommended for most users. Embedded forms may be placed directly on your website. This option allows updates to the form in Service Autopilot to automatically update your website.

Source Code   `Copy`
This option is for advanced use only. It provides the complete source code of the form.
Show Advanced Options ⌄

Not sure? Click here to send instructions to your webmaster.

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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

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"

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

6.

PAGE SELECTED   **PAGE 1**

When I click Next:

Go to PAGE 2   ⌄

FIELD SELECTED   **How Are We Doing?**

RULES   ⊕ Add Rule

RULE #1   🗑

If **How are we doing?:**

Is less than or equal to   ⌄

6   ⌄

then:

Jump to Page   ⌄

PAGE 3   ⌄

⊕ Add Action

Page 2

Snap to this if user selects 7 or above in satisfaction

We would love to hear any feedback you have for us!

[   ]

Back   Next

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

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

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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**