ServiceAutopilot™

FORMS

USER GUIDE

V3.1

Contents

What's New in V3 Forms

You're going to find that the V3 Forms tool is simpler and more powerful than SA Forms in the past. You'll be able to quickly create great-looking forms that help to streamline your business.

If you've already used SA's V2 Forms, be aware of some things that have changed with V3 Forms.

Enhanced Form Builder

- Forms can now have **multiple pages**—click a button to add a new page.
- Use **conditional logic** to jump from one page to another, based on the user's responses.
- Add **videos** to Forms.
- When building a form, **Autosave** prevents you from losing work.

Updates to Account Records

- You now have intuitive **Field Mapping** to most potential items like client name, address, state, etc.
- **Duplicate Record matching** – V2 Forms had automatic updates to account records, but V3 more intelligently matches duplicate records, based on your criteria. This might be useful when a client fills out a form multiple times from a website. V3 Forms will associate the responses to one account rather than create duplicate account records.
- **Audit Trail** – When an account makes a change to a Form field, all actions will appear in the Audit trail. You'll see a message such as "Address field was updated." Note that changes to an account's custom fields do not appear in the Audit Trail.

Form Responses Screen

- **Sort records by read or not read** – the dot in the blank column at left of table means it's unread.
- **Mark a record as read** - select the check box and then click "mark as read."
- The **Form Responses** screen lets you manage responses to forms, such as reviewing, updating, or creating an account (if "Automatically Manage Accounts" is off).

Office-Only Fields on Forms

- With V3 Forms, you can no longer change the information in form responses.
- We recommend that if you need a form field to be used only by office staff, either create a separate form exclusively for office use, or have the staff submit a copy of the same form with the changes needed.

Changes with Forms for Team

- V3 Forms are available on the **Team app**. They do not work on the Legacy Mobile App.
- Field staff can fill in forms on the Team app.
- The Team app now can have **prepopulated form fields**.
- **Dynamic form fields**—with V3, when you enter data onto a form from either SA or Team, the updated data displays on the other end immediately.

Why Use Forms?

Service Autopilot Forms can help you quickly collect data from clients and employees for almost anything your company needs. You can associate a Form with jobs, accounts, or services; or with actions or events on the Team app.

The SA Forms Builder offers simple templates that you can customize, or you can create your own Form from scratch. You can even add videos from YouTube or Wistia to a Form. When the Form is ready, you can email it, embed it into your website, or have an automation send it.

Some ways you might use Forms

- Set up procedure checklists for the Team app. Your teams can fill in the form before or after jobs, or at the start or close of the day.
- Send surveys to your clients. You might want to measure their satisfaction with recent services, or gauge interest in a new service you're thinking of offering.
- Create Forms for job applications or expenses.
- Encourage people to join your mailing lists.
- Collect leads from your website.
- Develop audit procedures.

Versatile and easy to use, Forms can help you collect information to help run your company more efficiently, cut expenses, and grow your business. And in many cases, you can integrate forms into an automation, to further streamline your processes.

"In God we trust. All others must bring data."
-- W. Edwards Deming

Get Started with Forms in Service Autopilot

Go to **Marketing > Forms** to see the **Forms** screen. The forms list shows the status of Draft, Published, or Unpublished, and the dates it was created and last changed.

Here, you can:

- See the list of any existing forms and create new ones.
- Choose a saved filter or add a new filter to narrow the list.
- Click a form's title to open it the Review overlay.
- Act on forms by checking the check box next to one or more of them.
- Select a single form and click **Copy** to make a duplicate to adapt.
- Change the status of a form by clicking **Publish** or **Unpublish**.

Considerations for Forms

When creating Forms, be careful about including or asking for sensitive information: information that's protected against unwarranted disclosure. Always consider:

- What you are asking for
- Whether you really need it
- The purpose of your Form
- Who will have permission to view the Form

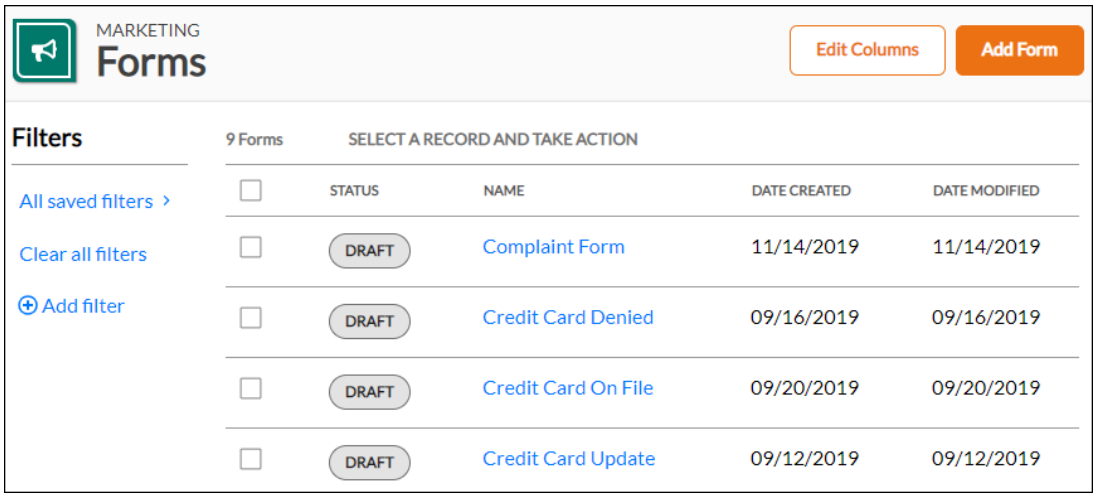
Step 1: Design a New Form

Once Forms are enabled and your permissions set up, follow these steps to create a new one. You can do this from a blank form or by using a prebuilt form template.

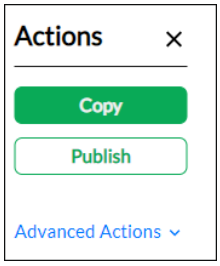
Form templates are completely customizable, so you can add to or edit all fields to meet your needs.

1. Go to **Marketing > Forms**.

   The **Forms** list screen displays a list of your saved Forms and their current status.

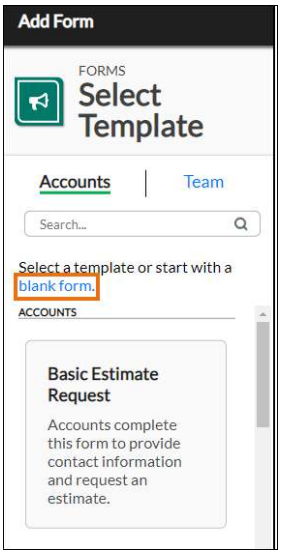


   On the **Forms** list screen, use filters to narrow your search.



   - Click a check box next to one or more forms, and the **Actions** menu appears.
   - Click **Copy** to copy the selected form.
   - Click **Publish** or **Unpublish** for a form.

2. Click **Add Form** in the upper right corner, and do one of the following:

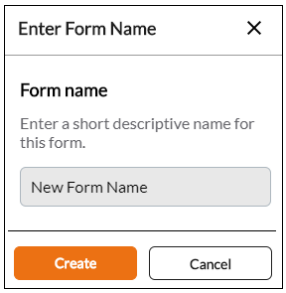


Click a form template under **Accounts** or **Team**, then click **Next**.

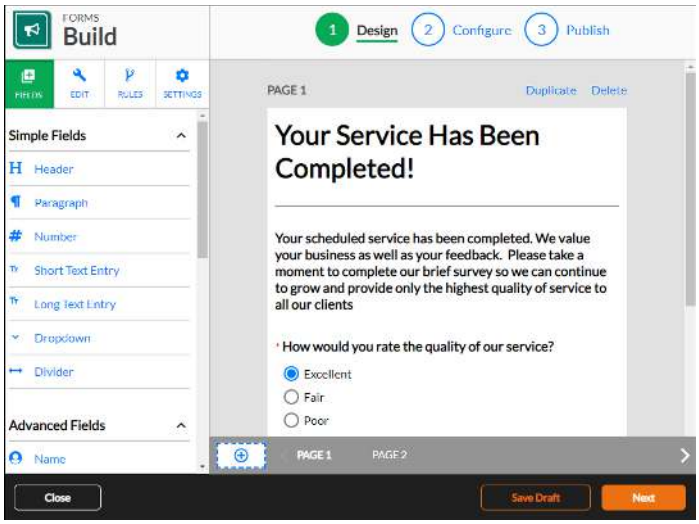
OR

Click the **blank form** link to start a new form.

3. Type your Form name in the overlay, then click **Create**.



4. The **Forms Design** screen appears. In the left panel, click any components you want for your form. The right panel displays how the form will look. Then edit them as shown below.



Add Fields to a Form

The left panel has four tabs, “FIELDS,” “EDIT,” “RULES,” and “SETTINGS.”

On the “FIELDS” tab, scroll to see the various fields you can add to your form.

Common Editing Options for Form Fields

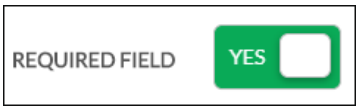
Every field in SA Forms can be customized in similar ways.

Make a Form Field Required/Not Required

- Customize Form Fields
- Customize Dividers
- Add a description
- Set up Form Field Mapping

Make a Form Field Required/Not Required

Select any field on the form, then click the **REQUIRED FIELD** toggle to turn it on or off.



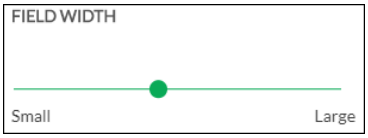
Customize Form Fields

There are three sections: **Simple Fields**, **Advanced Fields**, and **Widgets**.

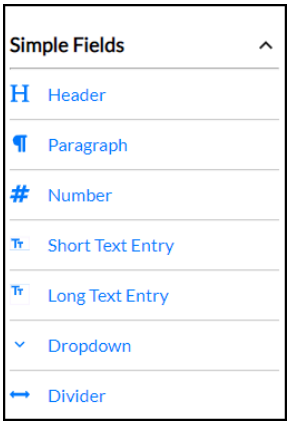
Under **Simple Fields**, click to add elements after the currently selected field.

- In the right panel, click the up and down arrow buttons to change the order of the fields.

- In the left panel, drag the **FIELD WIDTH** slider bar to resize the selected field.



- In the left panel, enter any data needed for a selected field.



Header – Enter a name for your form.

Paragraph – This field is for plain text and can be any length.

Number - Use this to add a number. Select a starting number from the dropdown list.

Short Text Entry – Use this for text entry of limited size like a name or address.

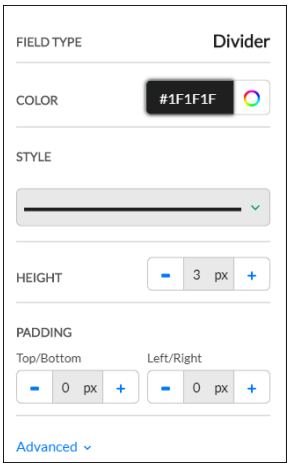
Long Text Entry – Use this field for free-form text, like comments.

Dropdown - The dropdown list gives users a set of options.

Divider - Use this line to separate parts of your form.

Customize Dividers

You can add a divider anywhere on your form. Use the formatting tools to customize it.



COLOR – Click anywhere on the color wheel, or enter a Hex code in the field. If you have an RGB code, you'll need to convert the number to a Hex code. An easy conversion website is: https://www.rgbtohex.net/

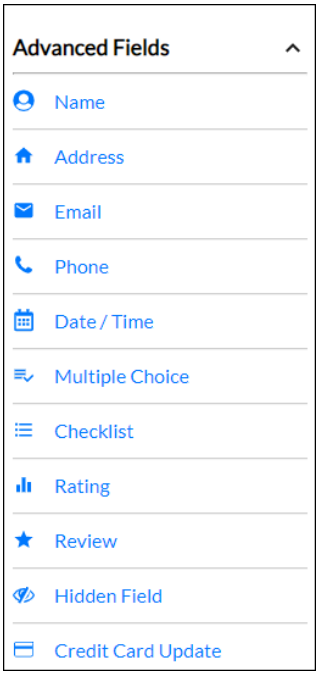
STYLE – Choose a solid or dotted line.

HEIGHT – Use the **–** and **+** keys or type in a number to change the line thickness in pixels.

PADDING – Add the amount of blank space in pixels around the divider.

Advanced Form Fields

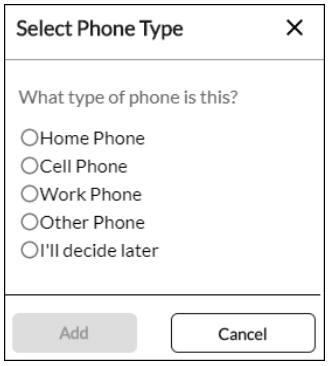
With Advanced Fields, you can easily insert different kinds of data fields into your Form. These are already set up for the format you'll need. With most of these fields, you can optionally add a label, description, and placeholder text, and use the slider to choose the size of the text field.



Email – This automatically maps to the **Email** field for the account.

Phone - The user can type in a phone number here.

If you want to collect multiple phone numbers, select the type in the dialog box.



Date/Time - This lets the user select from the calendar tool or type in a date and/or time.

Multiple Choice – The user can choose only one option from a list. You can provide any number of options in the left panel.

- Click **Add Option** to create a new one, or click the delete icon  to remove an option.
- Enter text for each of the Multiple Choice options.

Checklist - The user can select zero, one, or more answers from a list of check boxes.

Rating - Ask users for feedback with a numeric rating scale. See Add a Rating Scale to a Form.

Review – Users can provide a star review and add comments. See Add a Star Review to a Form.

Hidden Field – You can use this to store internal notes that are hidden from users. See Add a Hidden Field to a Form.

Credit Card Update – If you are integrated with a credit card processor, a secure form will appear for the user to enter their Credit Card information.

Form Field Mapping

Many form fields can be associated with, or *mapped to*, fields in Service Autopilot. This means that when a form is filled in, the data in mapped form fields **goes into the corresponding account field in SA**. Another advantage: any mapped fields for known accounts will **pre-populate the data** in that field.

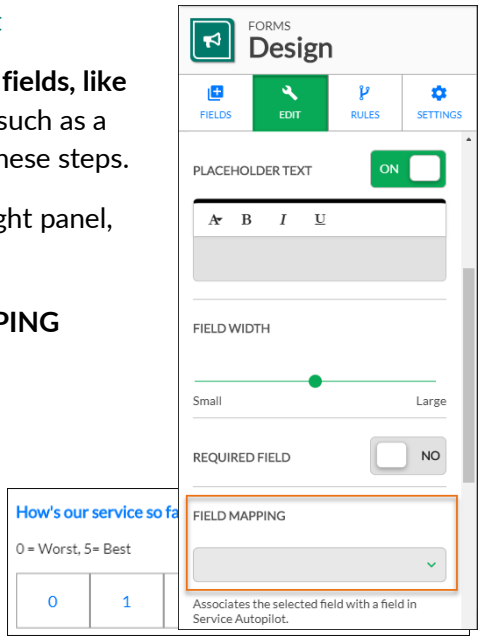
Some examples of form field mapping

- A client fills out a form with a **First Name** field. This field is mapped to SA, so the first name will auto-populate. The user can edit the name if needed, and that information will be automatically updated in SA.
- A client fills in a "Change of Address" form, and any mapped fields the client fills in are automatically updated on their account records in SA.
- An office staff member receives a call for an estimate request from a client. Instead of going to the **Client** screen, the staff member can quickly gather information on the form while they speak on the phone. Then the form automatically updates the account record in SA with any custom field data such as turf square footage or number of bedrooms in a house.
- A client's credit card charge has failed. You can send a form with the **Credit Card Update** field to the client. They fill out the form, and their payment information is mapped to their account record in SA.

Map a Field on a Form to a Field in Service Autopilot

Form templates are already set up to map some standard fields, like contact information. If you have an additional field in SA, such as a custom field, you can map it to your form field following these steps.

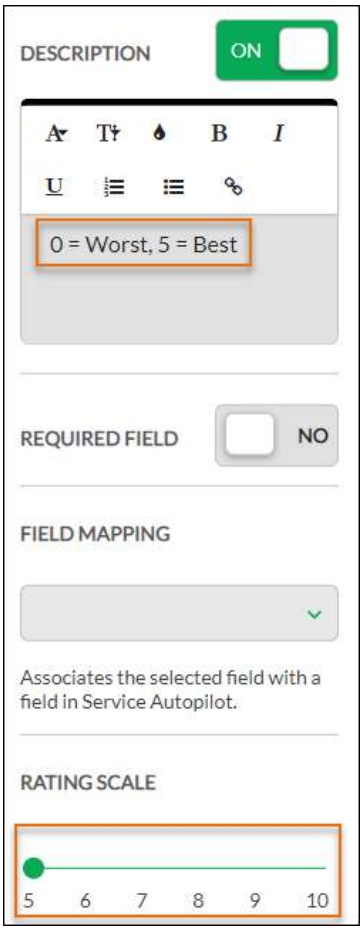
1. On the **Forms Design** screen, select a field in the right panel, or create a new one.
2. On the "EDIT" tab, select a field in the **FIELD MAPPING** dropdown list.



Add a Rating Scale to a Form

To ask users for feedback with a numeric score, use a rating scale.

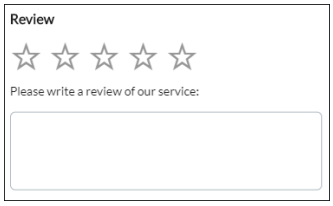
The user can select a rating from a range you specify, as shown below.

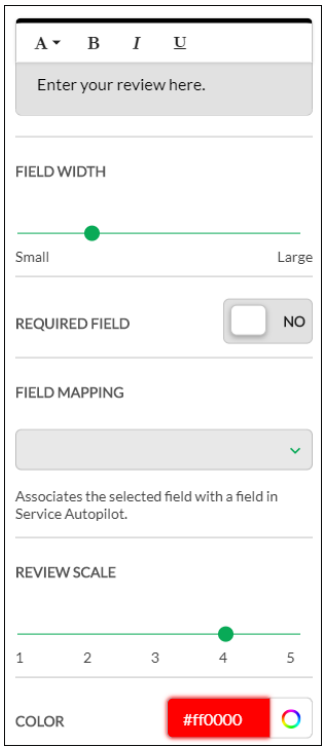


1. Go to the “FIELDS” tab.
2. Under **Advanced Fields**, click **Rating**, then click to select it.
3. Customize the form by changing any of the following:
   - Add a title in the “LABEL” field (“How’s our service?”)
   - Update the “DESCRIPTION” field if needed (“0 = Worst, 5 = Best”)
   - Set the number range for “RATING SCALE” by moving the slider. The minimum is 0-5 and maximum is 0-10.
   - Choose a color.
4. Under FIELD MAPPING, select an option from the dropdown list.

Add a Star Review to a Form

Similar to the "Rating" field, you can set up a star review and comment field.





1. Go to the "FIELDS" tab.
2. Under Advanced Fields, click Review.

Customize the form with any of the following:

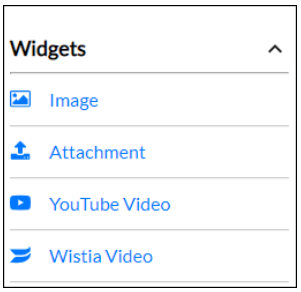
- Add a title in the **LABEL** field ("Review Great Service Company")
- Update the **DESCRIPTION** field if needed (for example, "Please write a review of our recent service")
- Update the **PLACEHOLDER TEXT** field if needed (for example, "Enter your review here.")
- Set the range for the number of stars by moving the slider, with a maximum of 5
- Under "FIELD WIDTH," change the comment field size by moving the slider
- Choose a color for the stars

Add a Hidden Field to a Form

This field lets you store internal notes in a simple text field. It's hidden from users.

1. Go to the "FIELDS" tab.
2. Under Advanced Fields, click Hidden Field.
3. Type any notes you want to retain in the **DEFAULT VALUE** box in the left panel.
4. Optionally, map the information to a field in SA by selecting a field from the **FIELD MAPPING** dropdown list.

Add Graphic Elements to a Form

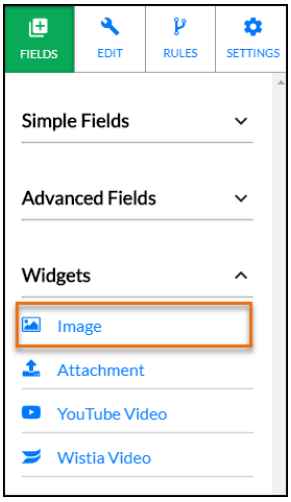


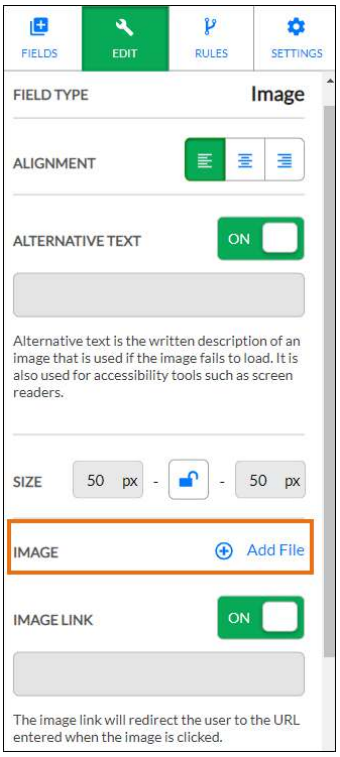
In the **Widgets** section of the **Forms Design** screen, click a widget to add it to the form. You can insert images or video links into your form, and allow the user to attach a file when they submit the form.

Add an Image to a Form

On the **Forms Design** screen, follow these steps.

1. On the "FIELDS" tab, go to the **Widgets** section, then click **Image**.





2. Click the image field on the right panel to see options for images in the left panel.
3. Click **Add File**, then browse to find the graphic file.
4. Optionally, set up any of the following options:

ALIGNMENT - Change the image location to centered or right -justified. Images are left-justified by default.

ALTERNATIVE TEXT – If you click ON, enter a brief description of the image. Alternative text can help in two ways:
- it informs sight-impaired users who have screen readers
- it helps identify the content if the image does not appear

SIZE - Change the size of the image in pixels.

The lock symbol means the ratio of height to width is maintained. If the lock is closed, you can change one of these fields, and the other field will change accordingly.

To edit the size fields independently, click the lock symbol to unlock the size fields.

IMAGE – Click **Add File** and your file browser appears. You can then navigate to your graphic image file.

IMAGE LINK – Click the **ON** toggle, and you can add a website link. When a user clicks the image, this website will appear.

Add an Attachment Field to a Form

To let the user add an attachment to a form, start on the **Forms Design** screen and follow these steps.

1. On the "FIELDS" tab, go to the **Widgets** section, then click "Attachment."
2. Optionally, change the field label in the **LABEL** field on the left pane.

The file size limit for an attachment is 100 MB.

Add a YouTube Video to a Form

On the **Forms Design** screen, follow these steps.

1. On the "FIELDS" tab, go to the **Widgets** section, then click "YouTube Video."
2. Navigate to your YouTube video and copy the URL for it.
3. In the **VIDEO URL** field, paste in the URL.

Add a Wistia Video to a Form

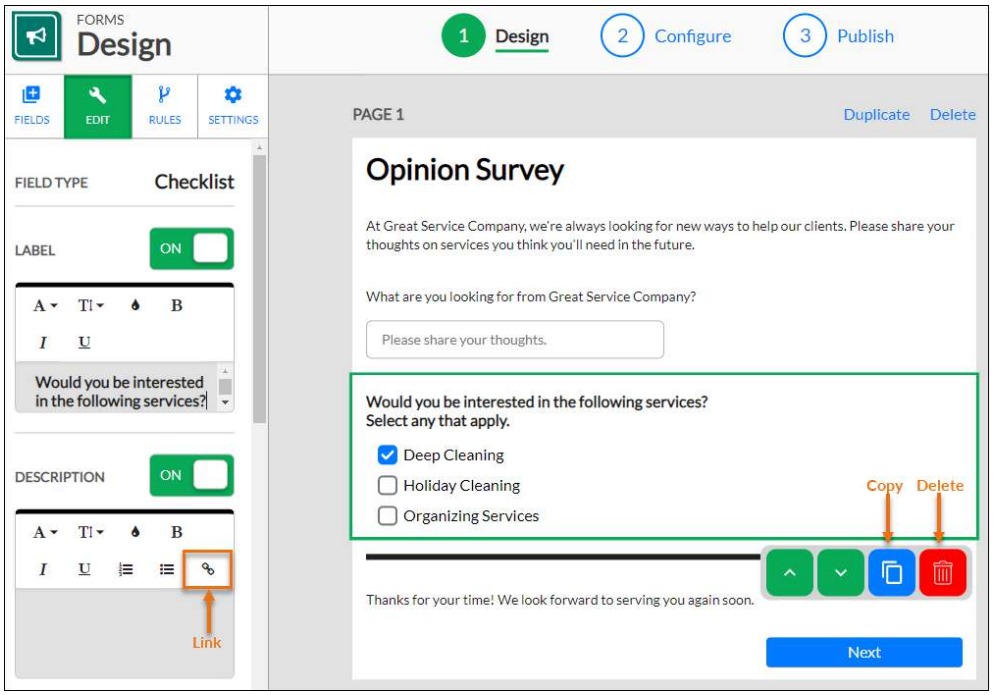
On the **Forms Design** screen, follow these steps.

1. On the "FIELDS" tab, go to the **Widgets** section, then click "Wistia Video."
2. Navigate to your Wistia video and copy the web address for it.
3. In the **VIDEO URL** field, paste in the web address.

Edit Fields on a Form

The "EDIT" tab of the **Forms Design** screen is where you make changes to the elements of your form.

1. Click an existing field in the right column, and the editable version in the left column is enabled.



2. Edit the text as needed using the standard editing tools. You can do things like adjust the font, add bold, italics, and underlines, and add numbers or bullets to lists.

To add a website address, click the **Link** symbol.

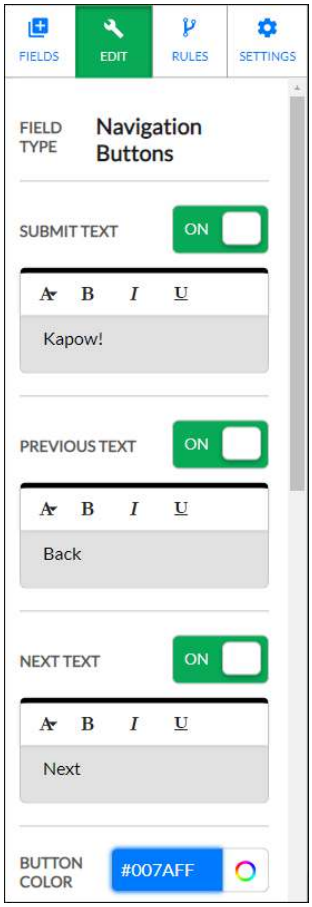
To **copy** a field, click the field, then click the **Copy** button.

To **delete** a field, click the field, then click the **Delete** (trashcan) button.

Customize Buttons on a Form

Your **Submit** button doesn't have to say "Submit." You can use any wording and change the text treatment, as with most areas of V3 Forms.

In the same way, you can edit any of the standard buttons, like **Previous** and **Next**.



To change the **Submit** button text:

1. Click the **Submit** button field in the right panel.
2. On the "EDIT" tab in the left panel, click the **SUBMIT TEXT** toggle to **ON**.
3. In the text field, type a new name for the button.
4. Optionally, select colors for the button.
5. There are similar options to change the color of the button text, the size of the border, and the height of the button.

Add CAPTCHA Security for a Form

For public forms, you can add CAPTCHA security questions that might be required for users to continue the form.

1. Select a navigation button field such as **Next**, **Previous**, or **Submit**.
2. On the "EDIT" tab in the left panel, click the **CAPTCHA** toggle to **ON**.

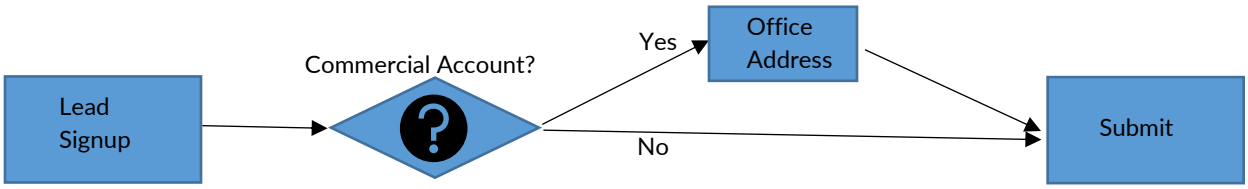
   CAPTCHA assesses the user's behavior to identify suspected bots and bring up a security test.

Plan Your Form

Every form needs to lead to one **Submit** button on the last page. For forms with multiple paths, it's important to sketch it out like a flowchart, to make sure the users all wind up in the same place.

Example: You have a signup form for new leads. Below the address field, there is a check box for *residential* or *commercial* account.

- If they select **Residential**, no more contact information is needed, so the **Next** button would take them to the final page where they submit their request.
- If they select **Commercial**, the **Next** button takes them to a separate page for the company billing address and office contact information. The **Next** button on that page would take them to the same final page as residential leads.
- On the final page, both types of leads click **Submit**.



Add a Page to a Form

On the "Design" tab, click the **+** button at the bottom of the screen to add a page. The new page appears at the end of your form.

Need to add a page in the middle of a form?

You cannot move pages within a form. Because new pages are automatically added to the end of a form, here's how to add a page in the middle.

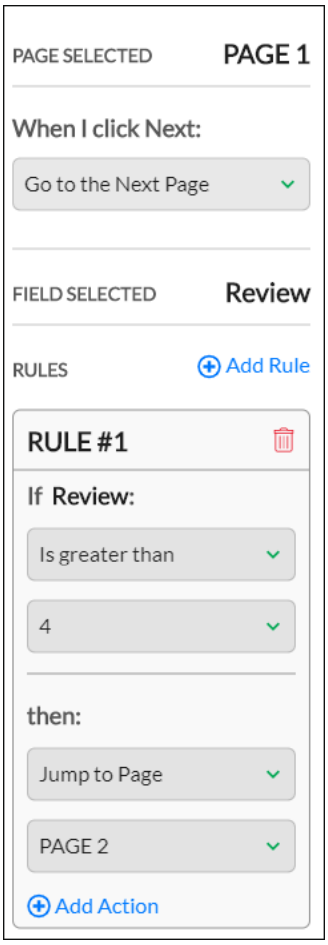
Say you have a four-page form and want to add a new page 3:

1. Click **Duplicate** to make a copy of page 2. The copy will appear as your new page 3.
2. Edit the information on the new page 3.

Set Rules for a Form

On the **Forms Design** screen, you can set up rules to control the behavior of your form—in other words, what happens next?

Based on responses, you can do things like display the next page or add a tag to a client.



1. Select any element on the right, and the Form Builder on the left brings up appropriate options for the element you've selected.

2. On the "RULES" tab, choose an operator and an outcome.

For example, for a review field, you might select "Is greater than" and then select "4" from the dropdown list to identify your most satisfied clients. You could do things like:

- Have them jump to a thank-you page
- Add a tag to these clients for future promotions

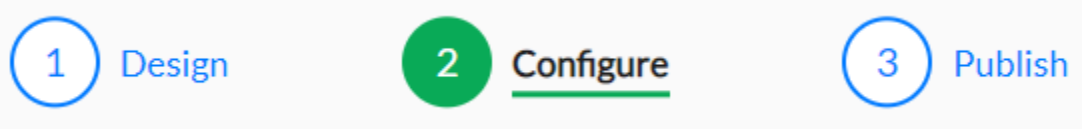
Change a Form's Appearance

On the **Forms Design** screen "SETTINGS" tab, you can choose the appearance of your form.

1. Enter a name for the form.
2. Select a standard *theme* to change the color scheme and fonts.

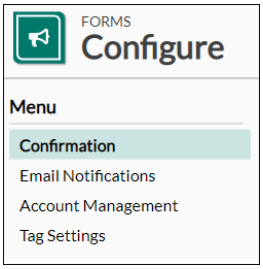
3. The **CSS CLASS** box is for advanced users only and lets you add a CSS class to your entire form.

Configure a Form



After you build a form, click **Next**, or click the "Configure" tab at the top of the **Forms Design** screen.

On the **Forms Configure** screen, you can specify:



- What displays after a user submits the form
- Whether to send email notifications and to whom
- Whether to automatically update an existing account with information from the submitted form
- Tags that should be applied to the account, based on the form submission

Set Up a Response for Your Form

After a user submits a form, they will see a response of some kind. To set this up, go to the **Forms Configure** screen and click **Confirmation** in the left pane. You have three options for form responses:

- **Document** – Select a document to display after the user submits the form.
- **Simple Message** – Type in something to display after the user submits the form. This is the default option.
- **Web Page**- Enter the web address of a web page you want the user to go to after submitting the form.

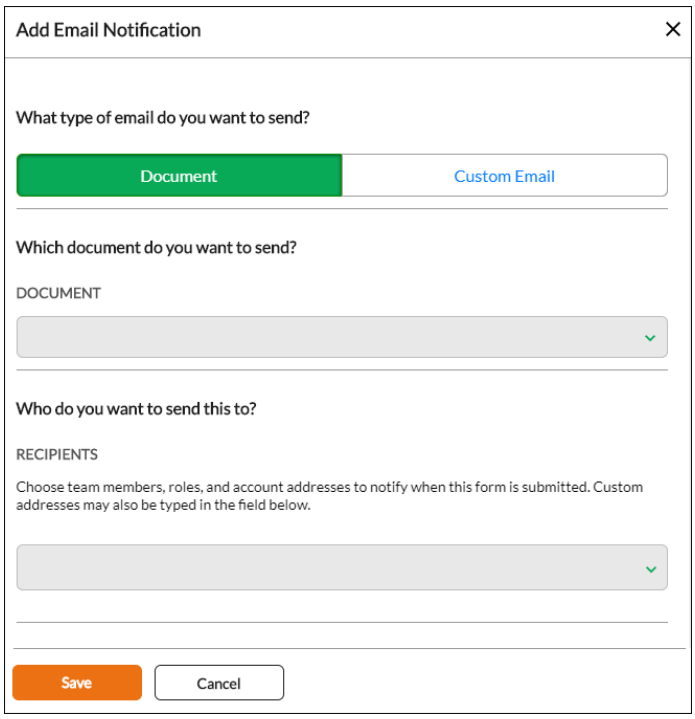
Set Up Email Notifications for Forms

You can have the system send notifications to employees or accounts who fill out a form by following these steps.

1. After creating a form, click **Email Notifications** in the left pane.

   You can either use the Document Editor to write an email in advance, or write a custom email.

2. Click **Add Notification** at the top right of the screen to see the **Add Email Notification** overlay.



3. In the **Add Email Notification** box, follow the steps for either adding a prepared document or custom email.

To use a prepared document:

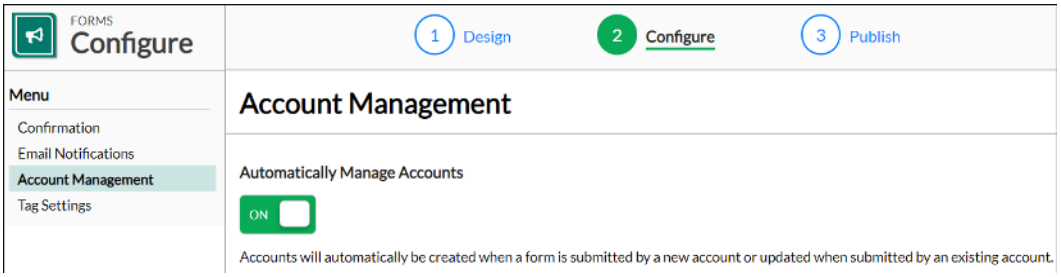
1. Click **Document**, then select an option from the dropdown list.
2. Select the recipients in the dropdown list. These can be either individuals or roles in your company, or the account who filled out the form.
3. Enter a name and email address that will appear in the “From” field.
4. For **Do you want to send a copy of this form?** change the toggle to **YES** if you want the email notification to include a link to the form response.
5. Click **Save**.

To write a custom email:

1. Click **Custom Email** and do the following:
2. Select the recipients in the dropdown list. These can be either individuals or roles in your company, or the account who filled out the form.
3. Enter a name and email address that will appear in the "From" field.
4. Type in the subject and body of the email.
5. For **Do you want to send a copy of this form?** change the toggle to **YES** if you want the email notification to include a link to the form response.
6. Click **Save**.

Set Options for Account Management

Choose how you want accounts to be handled when forms are submitted.



1. For **Automatically Manage Accounts**:

   If you select **ON**:

   When a *new* client or lead submits a form, a new account is automatically created.

   OR

   When an *existing* client or lead fills out and submits a form, fields that are mapped to the account will be automatically updated.

   If you select **OFF**, you must manually approve creating or updating the account. See Manage Form Responses on page 30 for more information.

2. For **Update Options**, choose how to update the account when a form is submitted: Replace all existing fields and add new fields.

   OR

   Do not replace fields; only add new fields.

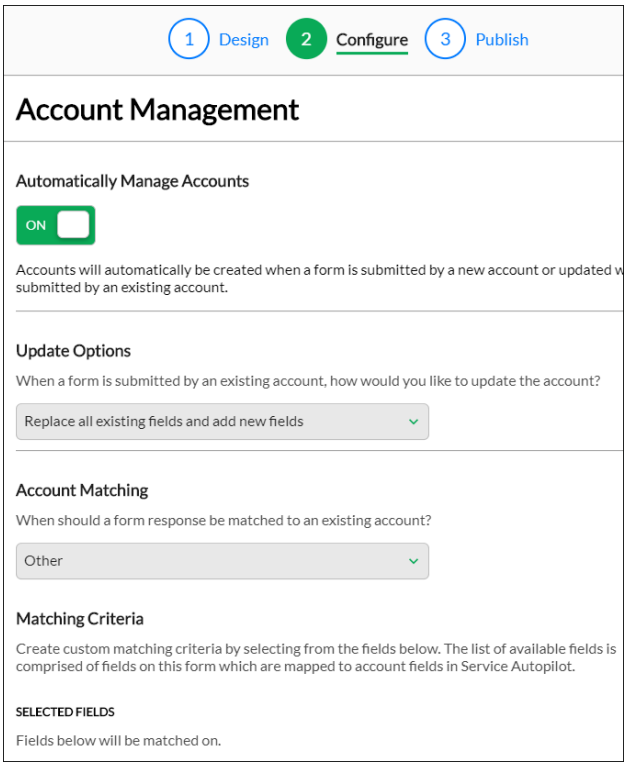
3. For **Account Matching**, specify how the system decides if the account is a duplicate by choosing an option from the dropdown list:

   Email address matches

   First OR last name AND email matches

   First OR last name AND email and client name matches

   Other



4. If you select **Other**, choose the custom criteria you want to use for matching from a list of fields that are mapped to SA account fields. Be careful to choose enough specific criteria to make the matches meaningful.

5. Click **Next** or click the “Publish” tab at the top of the **Forms Design** screen.

Publish a Form

Publishing a form makes it available to use. When the form is ready to go live, select it in the **Forms** list and click **Publish**.

Fix Form Warnings

If there are any issues that need to be fixed in a form, you can see the **Warnings** list screen by doing one of the following:

Go to the "Publish" tab and click **Form Options** in the left pane.

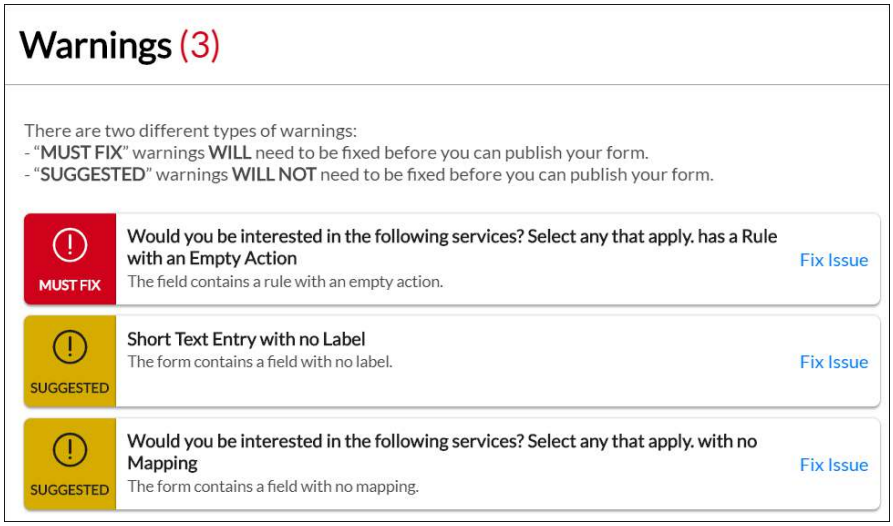
OR

Click the **Publish** button for a form.

1. On the **Warnings** list screen, fix any issues if needed.

"Must Fix" warnings indicate a problem that prevents the form from publishing.

"Suggested" warnings let you know of potential problems, but you can still publish the form without fixing them.



2. Click each blue "Fix Issue" link to go to the page. You'll see the issue highlighted.

3. After you fix all "Must Fix" issues, you can publish the form.

Where Will Your Form Live?

On the "Publish" tab for a form, you can specify where the form will live under **Form Options**. For "Where will this form be published?" select one of these:

- Website
- Mobile
- Office
- Mobile and Office

Publish a Form to a Website

If you are publishing to a website, click the **Publish** button before selecting one of the following options.

Hosted Form

If you choose this option, the form will live on its own page on the SA server.

- Click **Copy** to copy the form's web address to your clipboard.
- Place it on a social media website or other location of your choice.

Embedded Form

With this publishing option, the form lives directly on your website.

- We'll give you the iFrame code with all the form's information for you to embed on your website.
- Any updates you make to the form in SA will automatically update your website.
- Click **Copy** to copy the form code to your clipboard.

Source Code

This option for advanced users provides the complete source code of the form.

- If you later change the form and republish it, you will need to copy and paste the source code again.
- **Note**: If you are using CAPTCHA, the **Source Code** option is not available.

Send Information to Your Webmaster

Click the link below the list of options to email instructions to your webmaster. They will be able to securely access your Forms publishing options without needing to log in to SA.

Publish a Form to a Mobile Device

Website	Mobile	Office	Mobile and Office

If you are publishing to the Team app:

1. For “Publish Form To Mobile” select the type of item in SA that requires this form: Accounts, Services, or Timesheet Action.
2. For the next questions, **All** is the default. If you click **Choose**, select the check boxes you need.
3. For “Is this form required to be filled out?” change the toggle if needed.
   - “YES" will automatically prompt your team to fill out this form at the start or end of a visit.
   - "NO" will not prompt the team, but they can access and submit the form.
4. If you require this form to be filled out, for “When should the form be filled out?” select either **Start of Visit** or **End of Visit**.

Accounts or Services

Specify who should fill out the form and when:

1. For “Which accounts/services use this form?”

   If you click **Choose**, select the check boxes for the accounts or services you want
2. For “Which roles can fill out this form?”

   If you click **Choose**, select the check boxes for the roles you want

Timesheet Action

1. For “Which roles can fill out this form?”

   If you click **Choose**, select the check boxes for the roles you want
2. For “When should the form be filled out?”

   Choose when you want the user to be prompted to fill out the form

Publish a Form to Your Office

Website	Mobile	Office	Mobile and Office

If you are publishing to your SA desktop:

1. For “Publish Form To Office” select the type of item in SA that requires this form: Accounts, Services, or General.
2. For “Which accounts/services use this form?”

   If you click **Choose**, select the check boxes for the accounts or services you want
3. For “Which roles can fill out this form?”

   If you click **Choose**, select the check boxes for the roles you want
4. For the next question, All is the default. If you click **Choose**, select the check boxes you need.

Publish a Form to Your Office and Mobile Devices

Website	Mobile	Office	Mobile and Office

For “Publish Form To Mobile and Office” follow the steps above for Publish a Form to a Mobile Device and Publish a Form to Your Office.

Tags with Forms

An optional step in configuring your form is setting up how tags will be used. Tags are additional data points for your accounts, and a quick way to organize and group them. You can search for and filter by accounts with specific tags on the Account list—allowing you to do more effective customer service and marketing.

For example: Use tags for marketing by associating a tag with all the clients who submitted a specific form for your seasonal offer. This can help you filter clients into a list for a follow-up email or a promotion.

You can tag all clients who have **not** received marketing for the service, then you can remove the tag once the client submits a form for it.

Don't have tags yet?

1. Go to **Settings > CRM > Tags**.
2. In the **Actions** dropdown list, select "Add Tag."
3. Enter a name in the **Add Tag** box.
4. Select a category from the dropdown list, or add a new one.
5. Click **Save**.

You also can add a new tag on an **Account** screen by clicking **Create Tag**.

For more information on setting up tags, go to **HELP > On Demand Classes > Managing Your Clients**.

Set Up Tags for Your Form

On the "Configure" tab, click **Tag Settings** in the left pane.

Select either **Tags on Click** or **Tags on Submit**.

Tags on Click

Tags on Click adds a tag as soon as someone opens a form that you've sent in an email. This is a good way to indicate that a client or lead has seen the form, much like requesting a receipt for an email, even if they don't complete the form and submit a response.

Note: If you add a **Tag on Click** to a form that lives on your website, it will be treated like a **Tag on Submit**. **Tag on Click** applies only to forms sent in an email.

Tags on Submit

Tags on Submit lets you add one or more tags, or remove tags, when a form is submitted. Matching your **Tags on Submit** with your **Tags on Click** will help you gauge how successful the form has been.

Unpublish a Form

You can unpublish a form at any time. If you need to make a change to the form, you need to first unpublish it.

When you unpublish a form, the system will save all past user responses, but users are no longer able to access the form until it's published again.

Forms on the Team App

You can use forms on the Team app in various ways. Some examples:

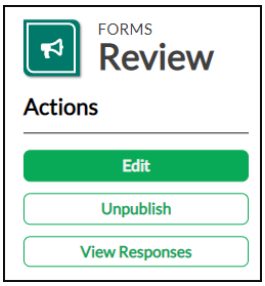
- Have your Crew Leaders fill out forms for jobs or procedures on a daily basis.
- Create Forms that can be filled out on-site in the event of an accident, damage, or an audit by one of your managers.
- Have staff fill out forms for clients when out in the field.

Clock In and Out with Forms

Any forms for clocking in or out of either jobs or the Team app will appear once per 12-hour period by default. So, if your Team Leader clocks into a job, or for the day, and then leaves and returns several times, there will be no prompts to re-fill the clock-in and clock-out forms.

Manage Form Responses

Any time after your form is published, you can see the responses to it on the **Form Responses** screen.



1. Go to **Marketing > Forms** and select a published form in the list.
2. In the top left panel, click **View Responses**.

The Form Responses Screen

The **Form Responses** screen shows a list of the responses to this form, and the status of each.

SELECT A RECORD AND TAKE ACTION

STATUS	DATE SUBMITTED	NAME	SUBMITTED BY	RELATED ITEM	FORM LOCATION	RESULTS
COMPLETED	03/05/2020	Basic Estimate Request	Alvin, Etta	Alvin, Etta	Office	Account Created
COMPLETED	03/02/2020	Basic Estimate Request	Falcona, Brandon	Falcona, Brandon	Office	Account Created
COMPLETED	03/02/2020	Basic Estimate Request	Hepburn, Kate	Hepburn, Kate	Office	Account Created
COMPLETED	03/02/2020	Basic Estimate Request	Hogg, Ima	Hogg, Ima	Office	Account Updated

Here, you can:

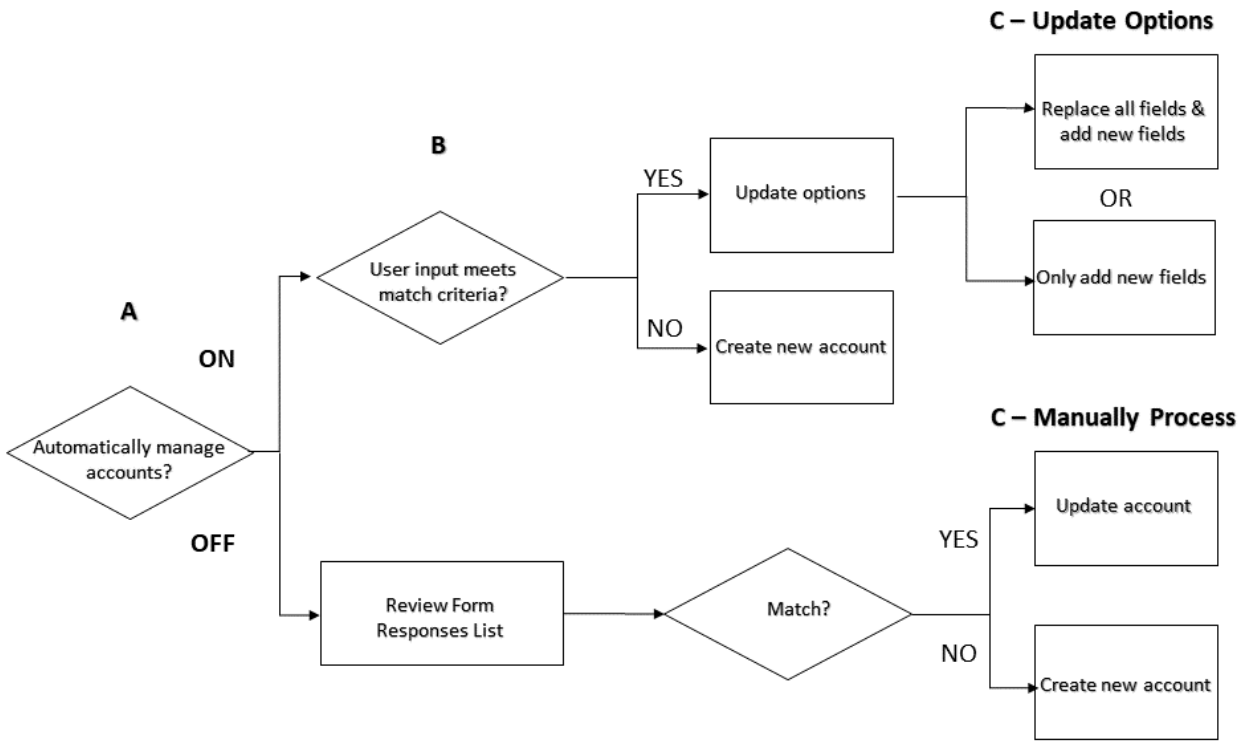
- **Filter by status** of the responses. Statuses can be:
  - **On Hold** -- You need to review the form and potentially update or create an account.
  - **Completed** -- The account has already been created/updated, so no action is required.
  - **Ignored** – You or someone in your office chose to select **Ignore Response** for this form response, so no action is required.
- **See which forms you have read or not read** – A blue dot on the left side of a row means it's unread.
- **Mark a record as read** – When you open a form response, it is automatically marked as Read. But on the **Forms Responses** list, you also can select the check box for the record and click **Mark as read**.
- **Manage Form Responses** – Click the name of a form to review, then choose how to handle it.

- **Print or email form responses** to the recipient of your choice—a client, yourself, or an internal employee. You also can download a copy to save for your reference. (XXX HIDE THIS BULLET FOR NOW; AVAILABLE IN R2)
- **See who submitted the form** and if there are any related items.
- **See the result for Completed forms**, such as "Account Created" or "Account Updated."

Set Up Account Management for Forms

The system will handle responses to your forms depending on how you set your preferences under **Automatically Manage Accounts**.

The flowchart gives an overview of how forms are treated, based on the account management options you choose:



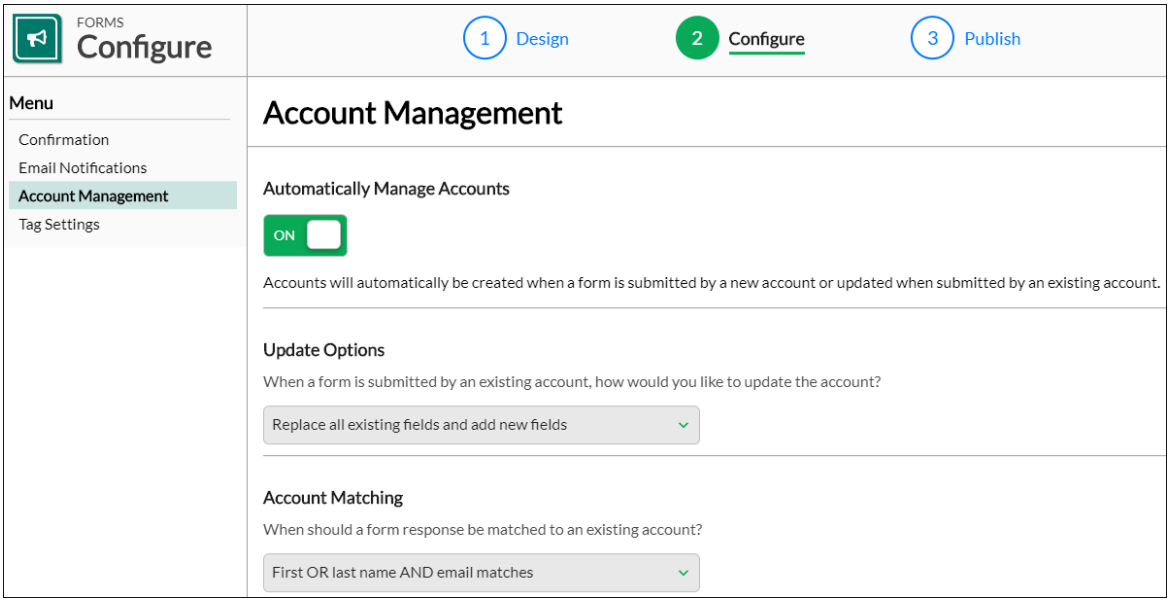
Automatically Manage Accounts for Forms

One of the advantages of V3 Forms is that the system intelligently determines when input is coming from the same account. This helps prevent duplicate records being created for the same account.

To set up your account management preferences:

1. Go to **Marketing > Forms** and select a form.
2. Click **Edit** to see the **Forms Builder**, and go to the "Configure" tab.
3. Click **Account Management** in the left pane.

If you set "Automatically Manage Accounts" to ON



With this setting, the system will compare fields the user updated against existing records, based on the matching criteria you set under **Account Matching**. One of these will happen when a form is filled out:

- *When a lead* fills out the form, and the matching criteria are not the same as an existing account, the system automatically creates a new account.
- *When a lead* fills out the form, and the matching criteria are the same as an existing account, the system automatically updates the existing account.

1. Select your **Update Options**

When an existing account is updated, the system handles data differently based on the **Update Options** you selected.

Choose one of these:

- **Replace all existing fields and add new fields –** this tells the system to always override everything that has a field mapping.
- **Do not replace fields; only add new fields –** this tells the system to add only new data to fields that weren't *already* filled in on the Account record.

2. Select your **Account Matching** options

Choose what fields you want to system to use when comparing an existing record against a user's input. Think about what would be a meaningful comparison, like unique identifiers such as an email address or phone number.

Choose one of these:

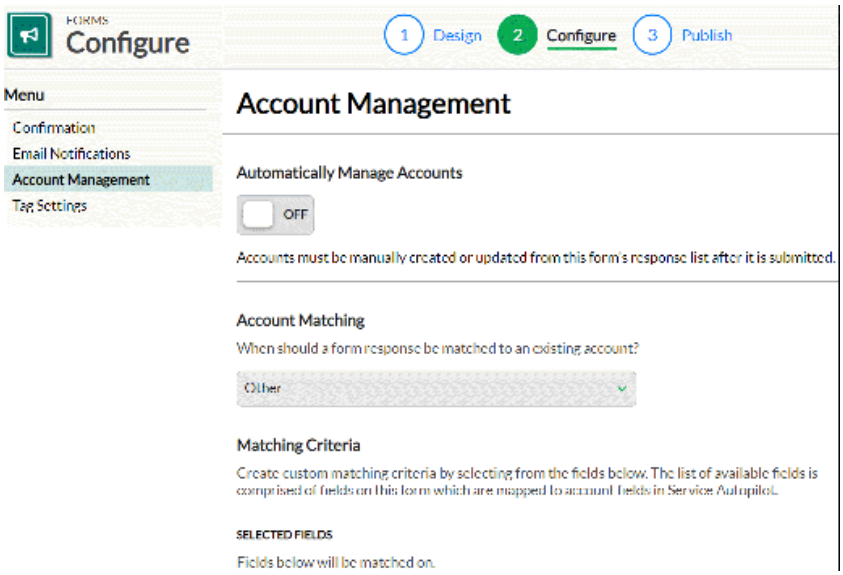
- Email address matches
- First OR last name AND email matches
- First OR last name AND email AND client name matches
- **Other -** For this option, supply your own matching criteria. You'll see a list of your form fields that are mapped to SA fields. Select the ones you want to match by selecting the check boxes for each.

Account Matching Example

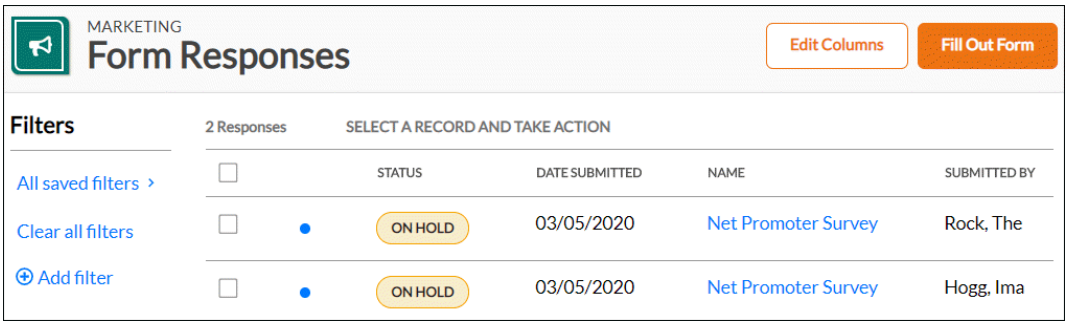
A client is in your system already, and his wife fills out an "Estimate Request" form on your website. She fills out the form with the same last name and email address, but a different first name. The outcome of this varies depending on your matching criteria:

- If matching criteria are set to match on first name, last name, and email address, the system would create another account for the wife.
- If matching criteria are set to match only the last name and email address, the system would consolidate the information, and update the existing account.

If you set “Automatically Manage Accounts” to OFF

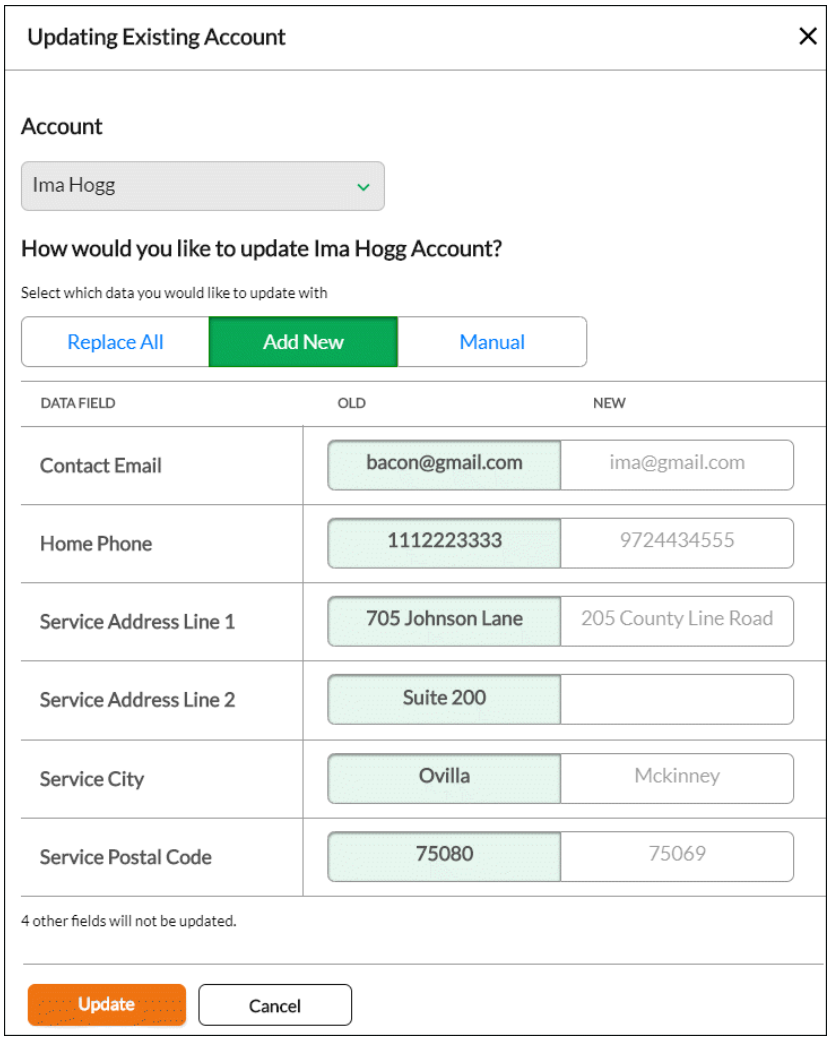


With this setting, the system compares the fields that the user updates against existing records, based on the matching criteria you set under **Account Matching**. You then need to go to the **Form Responses** list to manually review each form response and decide how to handle it.



1. Open a response by clicking the blue title.
2. Optionally, scroll through the form by clicking the arrows. 
3. Choose one of the options under **Actions**:
   - Update Account
   - Create Account
   - Mark as Unread

For **Update Account**, choose one of these options:



- **Replace All** – the system will overwrite **all** fields with information from the form.
- **Add New** – the system will overwrite only fields with **new** information.
- **Manual -** the system will overwrite only the fields that you select. Click any fields in the "NEW" column to overwrite the existing information in the "OLD" column.

4. Click **Update**.

If you don't want to update or create a new account record:

Click **Advanced Actions > Ignore Response**

Set Up User Rights for Forms

Forms are included with the Service Autopilot Pro and Pro Plus Memberships. For users in your company who will be interacting with Forms, you'll need to turn on permissions for access as shown below. For more information, see the *User Roles and Rights User Guide*.

Grant Permissions for Using Forms

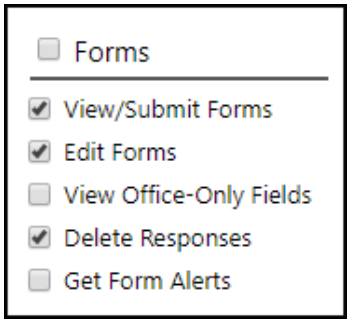
Go to **Settings > User Roles & Rights (role) > "CRM" tab**, then select permissions for each company role who will use Forms.

For users who need full access to Forms, select all the check boxes below.

View/Submit Forms

Users can navigate to the Forms and Form Responses list, send Forms in emails, and fill out forms from Service Autopilot.

Without this permission, users will not see the "Forms" link under **Marketing**.



Edit Forms

Users can access the Form Builder, create and save Forms, access a previously built Form, and change its fields or functionality. This includes editing, copying, deleting, publishing, and unpublishing a form; restoring a deleted form; and reverting to the Last Published version of a form.

Delete Responses

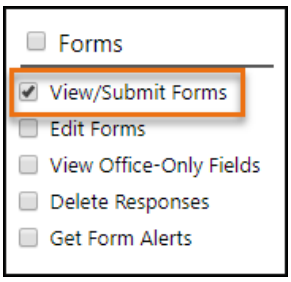
Users can remove any Form response containing information you'd prefer not to keep in SA, such as personal or security information.

User Rights for Service Autopilot V2 Only

Note: The user rights **Forms Summary**, **Get Forms Alerts** and **View Office-Only Fields** are not functional in V3.

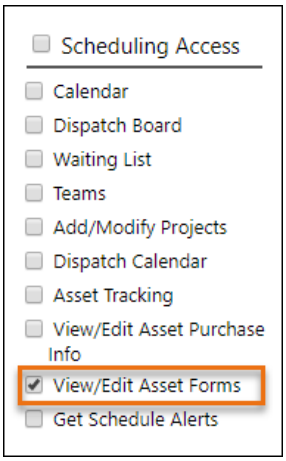
Grant Limited Permissions for Forms

Under **CRM > Forms**, you can set limited permissions by selecting only the **View/Submit Forms** check box:



Enable Forms for Team App Users

For Team app users who will use Forms, set permissions on two tabs under **Settings**.



1. Go to **Settings > User Roles & Rights**, then click a role.
2. Go to the "Scheduling" tab.
3. In the "Scheduling Access" column, select the check box for: **View/Edit Asset Forms**

4. Go to the "Mobile" tab.
5. In the "Mobile App Assets" column, select the check box for: **View/Submit Forms.**