Service Autopilot™

CLASSIC FORMS

USER GUIDE

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Summary

Forms allow you to collect data from people efficiently. Service Autopilot's Forms are flexible enough to meet your varied needs and user-friendly, so you can easily start collecting and interpreting information immediately. Here are some things Forms can do for your business:

1. Set up procedure checklists for your Teams that show on the Mobile App before and after Jobs, or at the start and close of the day. Fill out those same Forms from the desktop if you do *not* use the mobile app.
2. Send surveys to your Clients to gauge their satisfaction or even their interest in a new Service you're offering.
3. Create Job applications or Expense Forms.
4. Encourage people to join your mailing lists.
5. Develop audit procedures.

You can make a Form for almost anything you can imagine based on your company's needs. Forms can be associated with Clients, Jobs, Services, actions and events on the Mobile app, and they can be emailed or embedded on your website. Versatile and easy-to-use, Forms can help you collect and interpret information so you can run your company more efficiently, cut expenses, grow business, and prosper.

A Few Important Guidelines

When creating Forms, you want to be very careful about including or asking for sensitive information: information that is protected against unwarranted disclosure. For example, never have people fill out credit card information on a Form. Always consider what you're asking for, if you really need it, the purpose of your Form, and who will have permission to view completed and returned Forms.

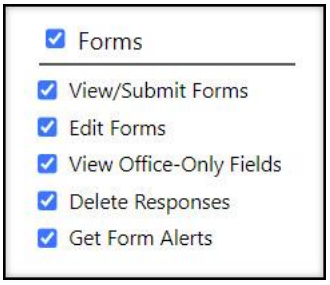
Getting Started

To start building and using Forms, you'll need to turn the feature on and provide access to Users who will be interacting with them.

Enabling Forms

Forms are a standard part of the Pro Membership and will be immediately available to initial member-users. For anyone else, you'll need to grant permissions.

Permissions



There are five individual Permissions associated with Forms functionality. When you have navigated to **Home>Settings>User Roles and Rights** and chosen the Role you'd like to edit, you'll find them on the far right of the **CRM** tab.

View/Submit Forms

This setting allows users to access the Form Builder so they can create and save Forms. Without this Permission, Users will *not* be able to see the **Forms** option under **CRM > Marketing**.

Edit Forms

This setting gives users the ability to change the fields or functionality of a previously built Form.

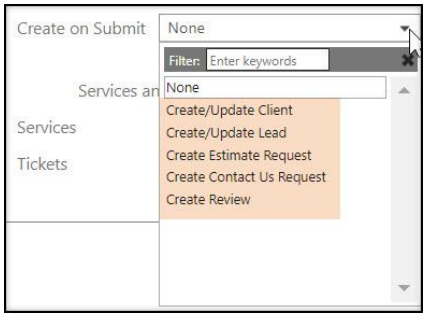
View Office-Only Fields

The Form Builder lets you create administrative fields where you can enter notes that are *not* viewable to Form respondents. You decide who can see those Office-Only Fields with this setting. For instance, if you have a number of internal Forms that are used to evaluate Employees, you may *only* want Managers to see the Office-Only Fields.

Delete Responses

Users who have permission to **Delete Responses** would be able to remove any Form responses deemed inappropriate, without value for your purposes, or otherwise containing information you'd prefer not to keep in Service Autopilot™ indefinitely; for example, perhaps a Client unthinkingly placed sensitive security information in a Form. If you have default text or numbers in a field, some respondents may not delete that before entering their responses, so having the ability to **Delete Responses** could help you clean up submitted Forms.

Get Form Alerts



This will be a future enhancement to the Forms functionality. We are currently working on how and where Alerts will be triggered.

When you choose a "Create on Submit" option under the **Form Settings** tab, you'll receive an Alert when a Form is submitted. That's because these Forms need to be acted on in some way, such as a creating a Lead, Client, Estimate Request, and more. After you have completed the action, your regular SA Alert settings will take over.

To see Alerts for Form submissions, the corresponding User Right must be turned on. To see the **My Day** page notification when a Form is processed, you must enable Alert settings at the Employee-level (**Team > Employees > [Select Employee] > Edit > Alerts** tab).

Where to Find Forms

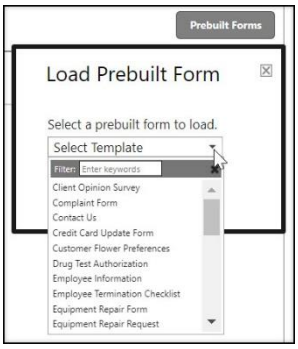
Once you have Forms enabled and the Permissions set up, you should see the **Forms** option under **Marketing** (in the Service Autopilot header). Clicking this option will take you directly to the Forms list screen. This screen is formatted similarly to others in SA. It shows all of your saved Forms and gives you the ability to create more.

Creating Forms

Click the **Add Form** button to access the Form Builder overlay. This overlay has the tools you need to create and manipulate your Forms.

You'll need to decide if you want to load a **Prebuilt Form** or start from scratch. You'll notice the Form Builder automatically loads a blank Form that you can start naming and adding fields to.

Prebuilt Forms



We have created dozens of Prebuilt Forms to get you started. They're completely customizable, so you can start with our fields then add or edit them as needed. Click the **Prebuilt Forms** button at the top right corner of the Form Builder. The Load Prebuilt Form dialog appears. Select a Form from the dropdown to customize it in the Form Builder.

Customizing Your Forms



The left panel of your Form Builder contains three to four tabs: **Form Settings**, **Add Field**, **Form Layout**, and after you click into a field, the **Field Settings** tab.

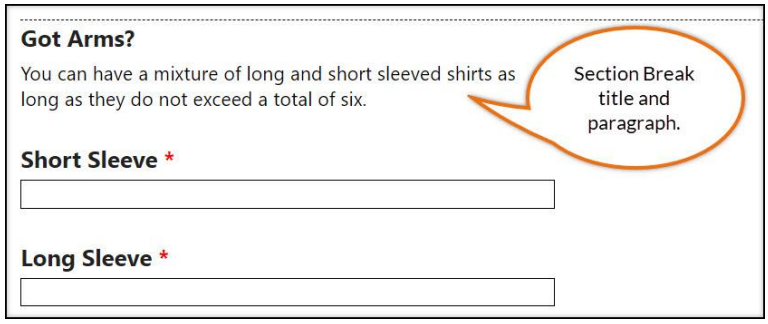
The left panel will slide up and down as you build your Forms and scroll the page unless you are editing a field. The **Field Settings** tab will not slide but adheres to the field you're editing.

Add Field

Add Field does just that. Fields are the individual pieces of information you ask from your respondents. These range from **Name** to a series of radio buttons that allow users to indicate their level of satisfaction from one to ten. All of the options for fields are laid out here. Click a field to automatically add it to the bottom of your Form, where you can then drag and drop it to another area and edit it with

the **Field Settings** tab. Most of the fields are self-explanatory, but we've pulled a few for further explanation.

1. **Section Break**: This is *not* a field respondents will use to enter information. Instead, it's designed to give them information and includes a perforated line at the top as a visual divider. It contains a title and paragraph area where you can write instructions or detailed questions. Let's say your company is ordering new shirts for its Employees and has created a Form to gather information. Instead of using the **Help Section**, which is *additional* information, these fields require the **Section Break** so employees can correctly fill them out.



2. **Net Promoter:** This field is different from the standard **Rating** field in that your Client's most recent response is recorded on the Client's Account as a star rating. In a future enhancement, your many Clients' cumulative responses will show on your Dashboard as an average to give your company a general rating.



3. **Review:** See the Company Reviews section.

Field Settings

Use the **Field Settings** tab to edit your fields. The editable options vary by Field Type. All aspects of the field are editable except the Field Type. If you decide you don't want a certain Field Type, simply click the red **X** on the right of the field to delete it. Edits take effect immediately.

Field Label

All Field options allow you to create a label or title even if you've chosen something as self-explanatory as "Address." Maybe you're creating a Spanish-Language form and need your "Address" to say "Dirección."

Field Width

This determines how your field looks in your Form. It has no effect on the amount of data someone can enter into the field. That's determined by your choice of "Character Limit."

Default Value

This setting only appears when the field you've chosen to edit can have a default value. For example, **Text** and **Number** fields give you the option to choose a "Default Value**."** Remember, if you choose to enter default information in a field, people will have to erase it before entering their own unless they are tabbing through the fields. **Multiple Choice**, **Address**, and your basic **Rating** fields are examples of those that do *not* populate the Default Value setting.

This could create frustration both for them and for you if you receive responses that include the default text at the beginning. If you can say it in the **Help Section**, do it. On the other hand, if you have a field you know respondents will almost always start with the same text, you could enter it to save them time.

Let's say your company has two branches, but one is smaller than the other with only a handful of employees compared to the three dozen at your home office. If you send a survey to all of your employees, you might ask which Branch they work at and set the **Default Value** to your home office since most people will be typing that in.

Visibility Level

This is where you determine if an individual field can be seen by everyone with Forms permissions or just people with "Office-Only" permissions.

Tip: Have Employees who are English language learners? Use the **Help Section** for Spanish or other language translations.

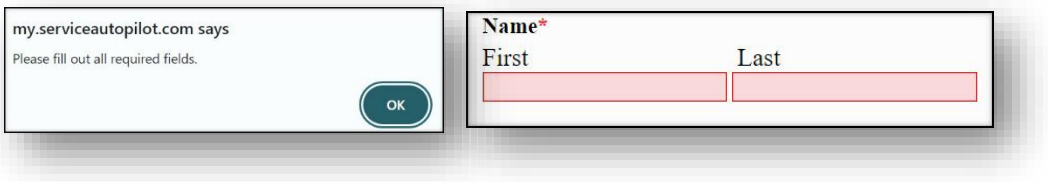
Help Section

Text that you enter in this section will guide your respondents into correctly entering their answers. If you have a field that may be helped by prompts, put them in the **Help Section.** Your text will generally appear to the right of your question in a Form.

Since mobile devices have limited screen space, Forms filled out on the Mobile App will show this text as a question mark icon that respondents can tap to pull up the **Help Section** text if needed.

Required Field

If you check this box, people will be unable to submit the Form without answering the field. A red asterisk appears next to the name of any required field. When someone attempts to submit a Form without filling out the field, they'll receive an error, and the field will turn red to indicate there's missing information.



Map To

Under the **Form Settings** tab, the "Map To" field allows you to link Form fields with various fields on the Edit Client overlay.

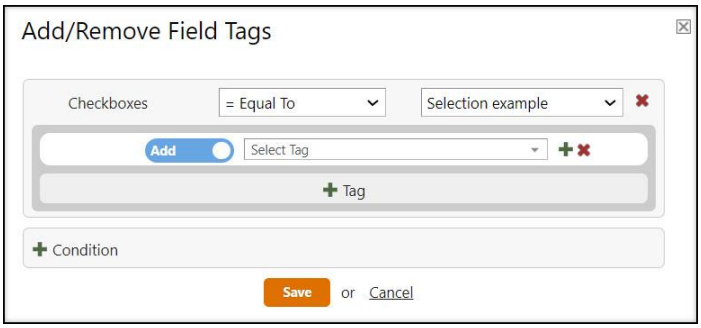
Note: When creating Forms that have actions associated with them, you *must* include Name and Address fields (under **Add Fields** > Advanced section), and you *must* associate them to "Map To" fields before you save the Form.

Character Limit

This field controls the amount of information Clients and Leads can enter into the field.

Field Tags

Based on the responses given to any field in a Form, you can add or remove tags. Click **Add Condition** to open the Add/Remove Field Tags dialog. This allows you to add conditions and choose the action that'll be taken upon those conditions being met.



Form Settings

Use **Form Settings** to determine the administrative-level pieces of your Forms: what happens with submitted Forms, when and where do the Forms appear, and what you associate or attach them to.

Name

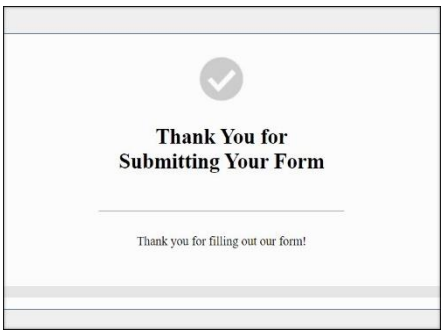
The "Name" is the title of your Form. This is what anyone who receives the Form sees along with the description.

Description

The "Description" allows you to give more detail or a directive: "Submit this form to be entered in the raffle for a free Design Service!" It will appear under your Form Name.

Confirmation Type

Use the "Confirmation Type" to show someone who completes the form a customized message or redirect them to a web page, which may thank them or suggest next steps. If you don't want to include



your own confirmation message, SA displays a generic message for you. It won't redirect respondents to another page, however.

Send Internal Email

If you want to send your Resources an internal customized email when a form is submitted, select the "Send Internal Email" checkbox. An **Email Options** link appears that opens a dialog where you can type the message and choose which Resources or Roles you want to send it to. Additionally, if there's an external email address or an internal one not included in the Resource or Roles dropdown, you may enter it in the "Email to" field.

Send Email Confirmation

"Send Email" adds an **Email Options** link that opens a Customize Email Confirmation Message overlay. Choose whether the email will go to a Client's billing or contact email. You can create the email in this screen or load pre-made templates that go with certain Forms. Personalization fields are also available.

When the "Send Form Copy" checkbox is selected, SA will send a copy of the completed Form in the body of an email to your Client. You can also send a copy to your company email address.

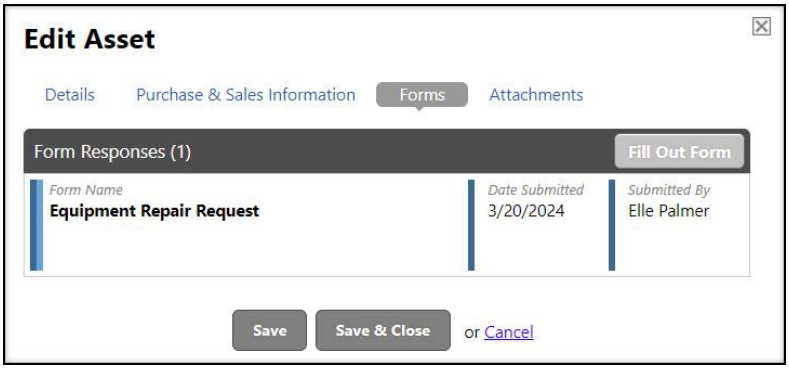


Show on Assets

"Show on Assets" is for Forms that deal with things like vehicle maintenance. Clicking this checkbox will remove extraneous Form Setting options. The "Show on Mobile" option is still available as you may have a Form associated with an Asset that your Team needs to fill out.

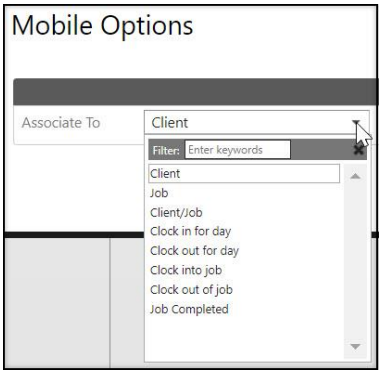
From **Team > Asset Tracking**, select an Asset to open the Edit Asset overlay then click the **Forms** tab.

Under that tab, you can see the Form responses associated with the Asset, as well as fill out the Form. You can show up to six fields on this overlay to get you the most important information quickly.



Show on Mobile

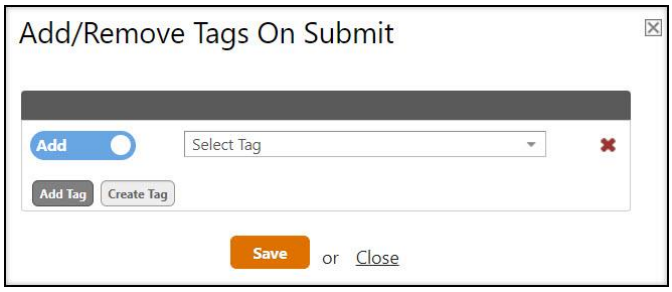
"Show on Mobile" adds a **Mobile Options** link that opens the Mobile Options dialog. Use the "Associate To" dropdown to choose when your form is displayed to your Teams:



1. Client
2. Job
3. Client/Job
4. Clock in for Day
5. Clock out for Day
6. Clock into Job
7. Clock out of Job
8. Job Completed

Associating a Form with any of the first three events allows your Team Leaders to choose those Forms from a list in the field.

Tags on Submit



"Tags on Submit" adds a **Customize Tags** link that opens the Add/Remove Tags On Submit dialog where you can add or remove tags from a Client once a Form is submitted. You can create new tags from this dialog. If you are marketing, associating a tag with all the Clients who submitted a particular Form can help you filter them into a list for a follow-up email or promotion. If you have tags associated with Clients you haven't marketed a specific Service to, you can remove that tag once the Client submits the Form related to that Service.

Tags on Click

Tags on Click does the same, but it adds the tag as soon as someone opens the Form. This is a good way to indicate that a Client has seen a certain form even if they don't submit it, much like requesting a receipt for an email. Matching your **Tags on Submit** with your **Tags on Click** will indicate how successful the Form is.

Create on Submit

You may decide that having someone fill out and send a Form isn't enough. You can follow up on Form submissions by creating an action that must be done when a certain Form is submitted. Any action will display on your Responses screen.

If you choose to **Create Lead** or **Create Client**, you must make sure that your Name and Address fields have a designated "Map To" field. Otherwise, you cannot save the Form.

When you choose an option from the **Create on Submit** dropdown, a **Source on Submit** dropdown appears.

Source on Submit

After you select an action to perform when someone submits a Form, this setting allows you to choose the Source for the Form response, such as Door Hanger, Yellow Pages, and more. When someone returns this Form, your Form Responses screen will display that Source. Where did this Form originate? Was it a door hanger? Did you make a special offer for client referrals?

Show in Timelines

"Show in Timelines" will place the Form in a Client's or Lead's Activity Stream.

Associate To

You can associate Forms with specific Services or Ticket types. Dropdown menus for both will allow you to select which Services and Tickets you want the Form associated with. You *do* have the option to "Check all." A Form that's associated with a Ticket type, for example, can be filled out in the Ticket overlay if it was created under that type.

Form Layout

From the **Form Layout** tab, you can make decisions about your Form's appearance, security, and customize your **Submit** button.

Template Type

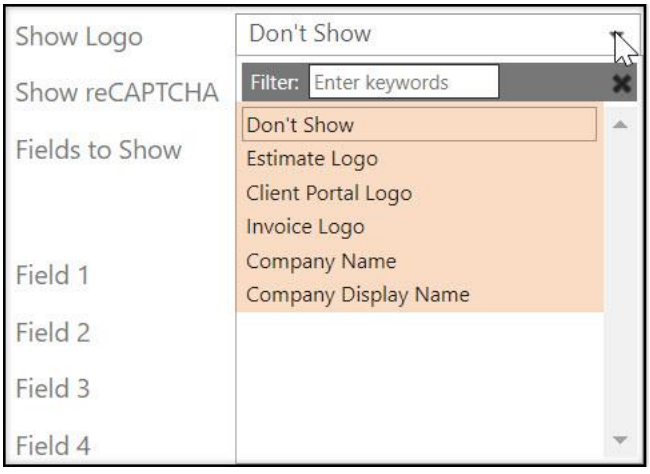
Use this dropdown to select the Form's color scheme.

Submit Button Text



Your button doesn't have to say "Submit." For example, if you're sending out surveys or you're giving away a free estimate to a lucky respondent, you could call your respondents to action with "Enter to Win!"

Show Logo (or Company Name)



People filling out your Forms need to feel confident the information they're giving you is safe. Branding your Forms with your logo will make respondents more comfortable with sharing that information and more likely to complete and submit their Forms.

You can choose from any of your three preloaded Service Autopilot Logos under **Settings > Company Logos**.

If you don't have logos uploaded or prefer not to display your logo, you can choose to display your **Company Name** or your **Company Display Name** instead.

Show Captcha

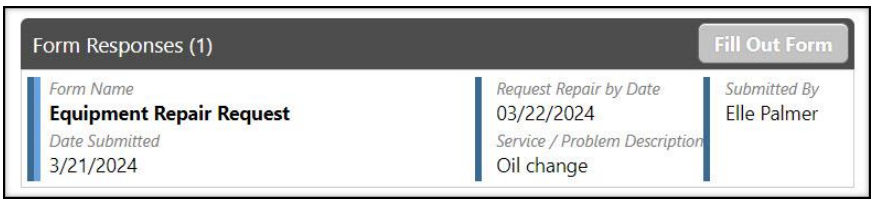
If you want to ensure that real people (not computer programs) are filling out your Forms, you'll want to select the Show Captcha checkbox. A "test" math question will load on your Form. The respondent

must type the correct answer to successfully submit the Form. This added security can be useful if your Forms appear on your website, where any and all traffic can see them.

Note: Ever wonder what CAPTCHA means? It's a very long acronym that means "**C**ompletely **A**utomated **P**ublic **T**uring test to tell **C**omputers and **H**umans **A**part." In the 1950s, Alan Turing introduced a test of a computer's ability to imitate human behavior in text conversations.

Fields to Show

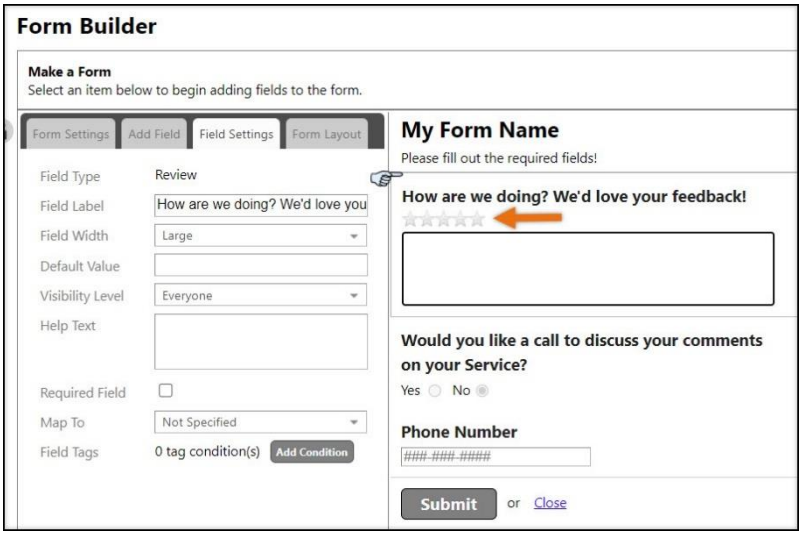
You can see up to six fields per Form anywhere you can view submitted Forms in SA. This allows you to quickly view the most important information. The dropdown list will populate with the field titles



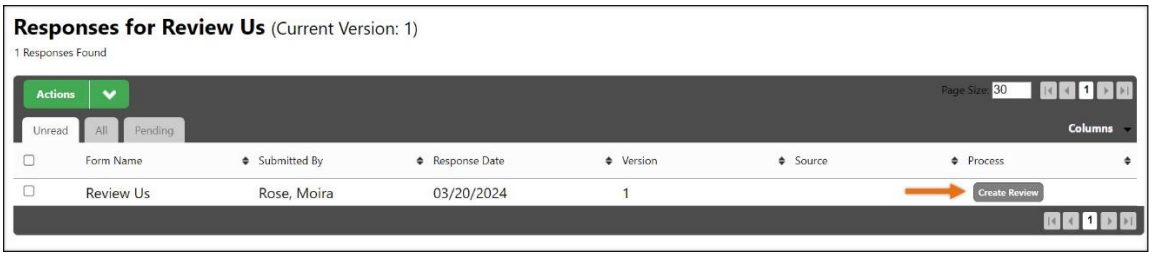
you've created for each form and updates dynamically as you add, drop, or alter fields. Below is an example of the Form Response summary.

Company Reviews

If you want to your Clients to review your company and publish those reviews to your website, you can do so by creating a Form that uses the **Review** advanced field.



Once returned, this Form will give you the opportunity to create a Review that you can place on a web site using the Publish Forms feature.



Clicking the **Create Review** button prompts you to approve the request. We recommend you view the response before approving it. If you have administrative privileges for Forms, you might want to remove sensitive information or pare down the comments to key points, if applicable.



Once you approve the request, you can publish it to your website. The code is available from the **Publishing your Forms** page. Copy and paste the code into your website; it will look something like this:



As you approve more Reviews, they appear in a list with the newest one at the top:



Viewing Forms on the Forms List Screen

When you have Forms saved, you can return to your Forms list screen to view them alphabetically. From here, you can do more than click a Form to edit it.

The tabs across the top allow you to choose which Forms to view. You can also adjust your page size.



Actions Menu



The **Actions** menu contains bulk editing options, including the **Copy Form** option, which will duplicate any Form you've chosen and prompt you to rename the new copy. This could be useful if, for instance, you're sending the same Form to several groups, but you want each to have a slightly customized version.

Forms List Screen Columns

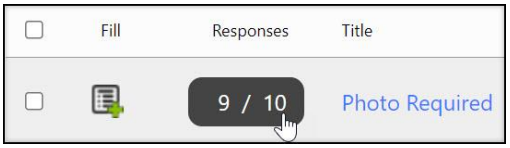
The headers on the list screen display basic information about your Forms, including the ability to click a Form's Name or Description to manage it in the Form Builder. Aside from that, the Forms list screen has some additional functions.

Fill

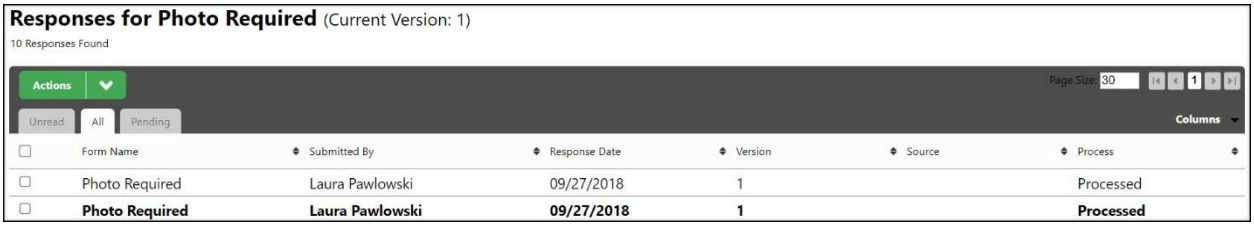
If you click the **Form** icon under the "Fill" column then your Form will appear in an overlay so you can fill it out yourself. When reviewing responses, it will show as submitted by you. This is a good way to test your Forms. If you have a Form that you want everyone to fill out then anyone with a login and permissions can fill the form out from this screen.

Responses

The number of completed responses to your Form is displayed in this column. The number button shows two numbers: unread and total responses.



Click the Number button in the "Response" column to open the Form Responses screen.



The Response screen will open to your unread responses. The **All** tab will show unread responses in bold. Clicking the response line will open the filled-out Form in an overlay. Once you've read a

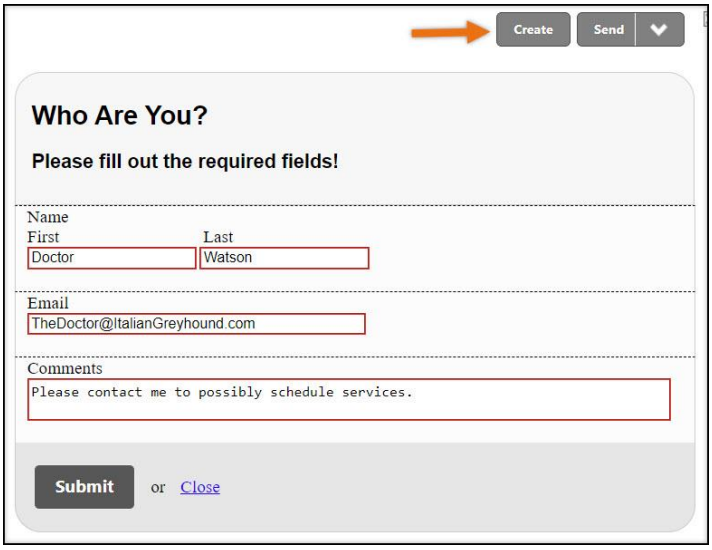
response, the bold lettering will disappear, as it has in the first response above. When you refresh the screen, that response will move from the **Unread** tab to the **All** tab, unless it's "Pending."

The "Pending" tab will show responses that are awaiting an action. This is referring to the "Create on Submit" option in the Form Builder under the **Form Settings** tab. Selecting an option from this dropdown creates an action that needs to be completed before the Form is processed.

The Process column on the far right of the Form Response screen will indicate if action needs to be taken with the Form with the corresponding button. The button will appear under the **All** tab and the **Pending** tab. Perhaps you've selected the **Create/Update Lead** option upon the Form's submission.



If you click the Form name to open it, the overlay will also give you the option to create the lead. Click **Create** to change the status to "Processed" and remove the response from the **Pending** tab.



Remember, the person under the "Submitted By" column isn't necessarily the person responding to the Form.



In the above example, both responses were submitted by Service Autopilot Employees who filled out the Form on behalf of the Lead using the **Form** icon.

Forms emailed to Clients will show as submitted by that Client.

Note: Any Form that's returned from an open web link will currently show "Submitted By" Anonymous as there's no way to track who filled out the Form. SA *cannot* map a Form response that comes from a website like it can map a link that's sent directly to a Client. In future functionality, you'll have the option to bind the "Submitted By" field to the "Name" field on the Form itself. This won't guarantee 100% accuracy as people filling out the online Forms could use any name, but if you prefer to see the potential Client's or Lead's name instead of Anonymous then you could choose that option.

Publish

The "Publish" column allows you to share your Form on the web in various ways. Clicking **Publish** will open the Publish Forms overlay, which has various copy options.

Publishing your Forms

The Publish Forms overlay contains the code you need to publish your Forms to the Web in a variety of ways.



Click an option to expand it and reveal the code. Click the **Copy** button to copy the entire code then paste the text in your desired destination.



Share with Your Network (The Link)

You can share a basic link to your Form that will work for all social media sites, including Facebook and email. This is a permanent link that will *not* need to be updated if you change the name of your Form.



Embed

If you want to integrate the Form into your external website, then use the Javascript Embed Code.



Use the Hosted Form

An iFrame or inline frame is an HTML document that sits inside another HTML document. SA gives you the code with the Form information in it, which is hosted on our server, so you can embed an iFrame into your site.



Full Form

For those of you who have designers working on your website or do your own design, we've also included the full HTML for your Form. With this option, you can style your elements however you wish.



Company Reviews

As you receive feedback from your Clients via Company Review Forms, you can show those reviews on your site. They also appear in an iFrame.



Stripped Form

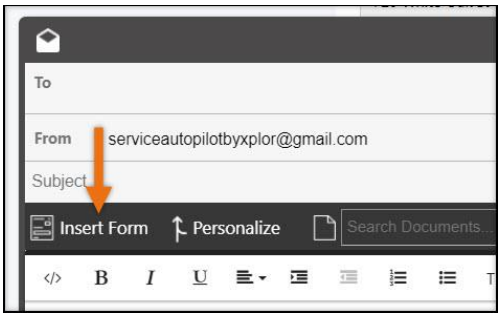
If you only want the basics of the HTML to put on your site, then use the stripped-down version with as little CSS as possible. This means it won't have our framing, color themes, and more. This option allows you to put in your own.



Emailing Forms

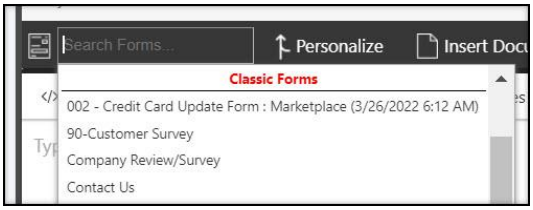
From Client and Lead Screens

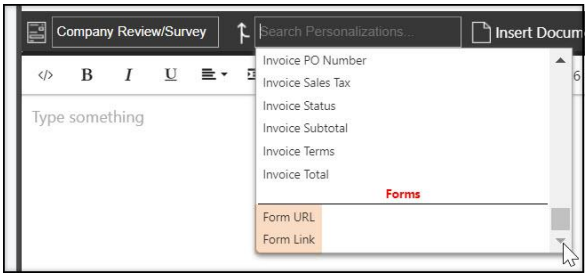
You can send Form from individual Client and Lead screens. When you open an email, you'll see the **Insert Form** option under the Subject line.



Click this option to select the Form from the dropdown menu. Your Forms will show in alphabetical order.

If you don't include the **Form Link** or **Form URL** (from the Personalize field) in the body for your email, then SA will include the Form Link at the bottom of the email you send.

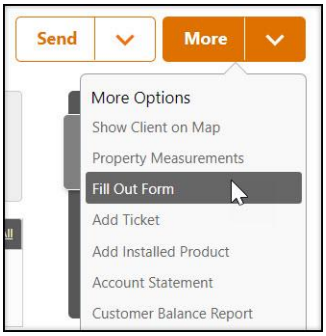




The **Form Link** is a contextualized link, meaning it will say, "Click Here," in the body of the email. This does *not* require html coding.

The **Form URL** option will place the entire html link in the email, which can be lengthy.

You can also click the **More** menu on a Client's or Lead's screen then select **Fill Out Form** to complete a form on their behalf.



From CRM > Marketing

You can also email Forms from the **Marketing** screen in SA. This gives you the same email options. The difference, however, is that you can send bulk emails to Clients.

Warning: Because of anti-Spam legislation, you *cannot* currently send bulk emails to Leads through the **Marketing** feature.

Forms on the Mobile App

You can use Forms on the Mobile App for a variety of purposes. Among other things, you can have your Team Leaders fill out Job or Procedure-related Forms on a daily basis and create Forms that can be filled out in the event of an accident, damage, or audit by one of your managers. Client-associated Forms can also be filled out on the fly by your technicians if necessary.

Any Forms associated with clocking in or out of Jobs or the app will default to show once per 12-hour period. If your Team Leader clocks into a Job or clocks in for the day, then leaves and returns several times, they will not be prompted to re-fill the clock-in or out Forms. Additionally, only the first person clocking into a Job for a Team will be required to fill out the Forms associated with the clock-in. Likewise, clocking out of a Job only brings up your clock out Forms for the first person to clock out.

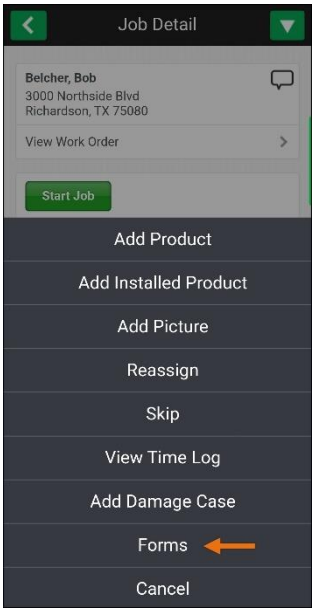
Although Forms can only be edited or created from the desktop, they can be viewed and filled out on the fly from the field.

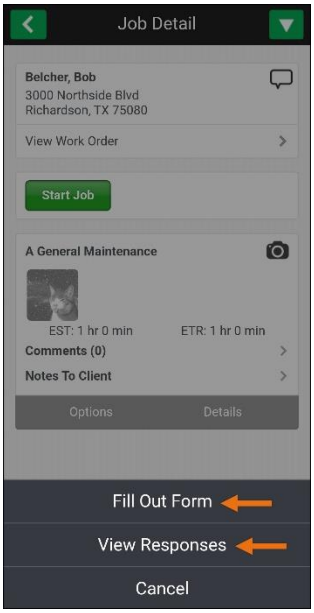
Job Detail Screen

If a need arises for an extra Form to be filled out on a Job, any Forms associated with a **Job** or **Client/Job** will show in a list of available Forms while the user is in the Job Detail screen.

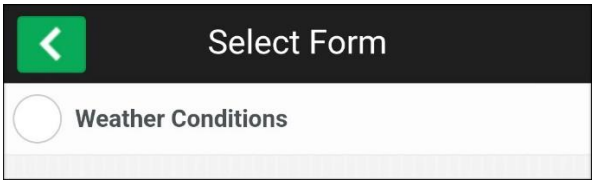
Access your Forms from the Job Detail screen by tapping **Options > Forms**.

Tapping **Forms** will pull up new options from the bottom of your screen. You have the option to **Fill Out Form**, **View Responses**, or **Cancel**. Tap your preference.





Fill Out Form takes you to a list of Forms associated with Jobs. Select one to open the Form in a new screen and fill it out.

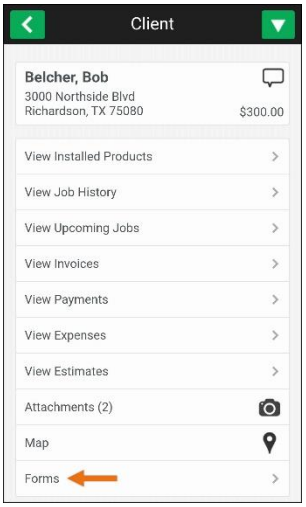


Tip: Create an email template to go with specific Forms so you can cut down on the time spent building emails and including links.

View Responses will take you to a list of completed Forms for that Job.



Client Detail Screen



Forms associated with a **Client** or **Client/Job** appear on the individual Client's screen on the Mobile.

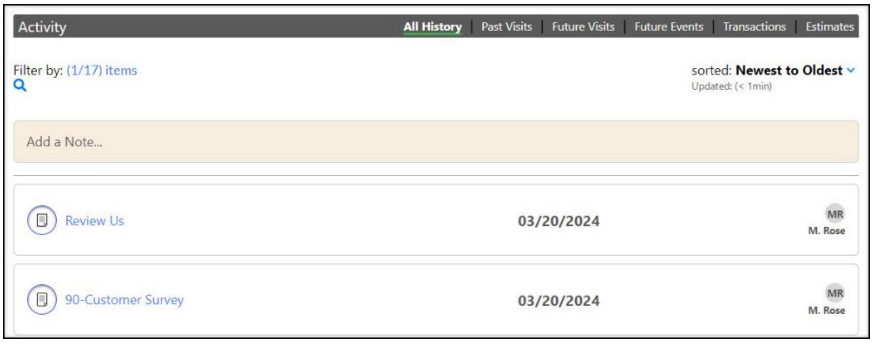
Tap **Forms** to pull up the same **Fill Out Form** or **View Responses** options the Job Detail screen gives you.

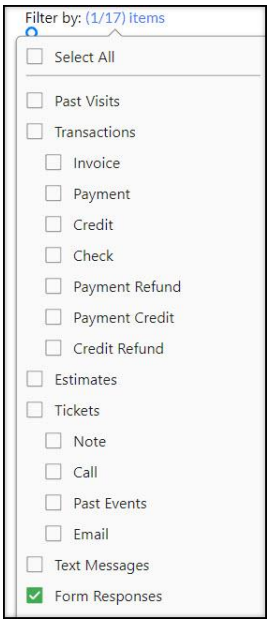
Fill Out Form opens a list of Forms associated with Clients. Select one to open it in a new screen and fill it out.

View Responses takes you to a list of completed Forms. Tap the Form to open it and review the submission.

Forms in Activity Streams

You have the ability to view Forms in a Client's or Lead's Activity Stream.



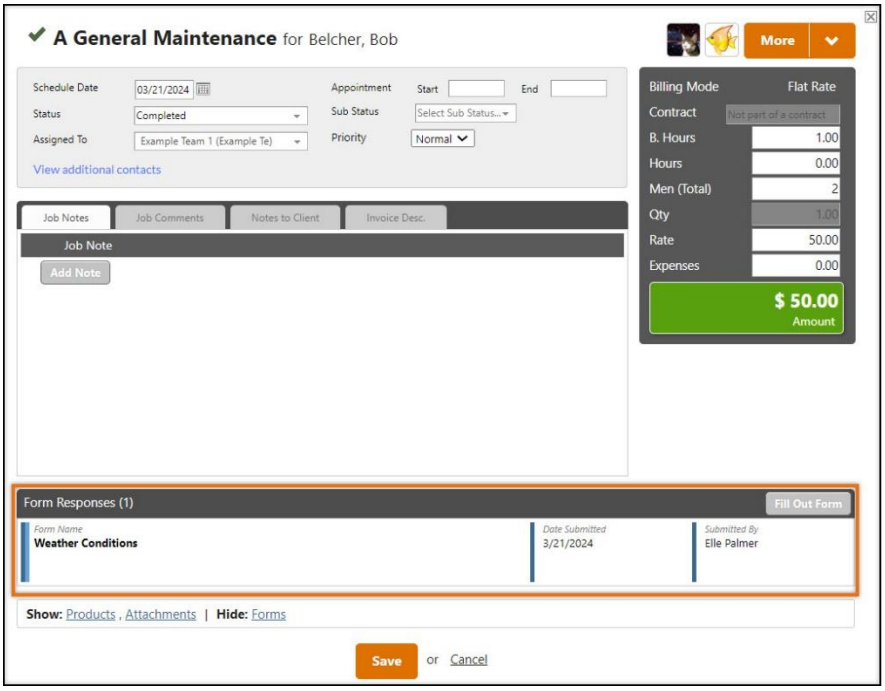


Use the "Filter by" options to filter the Activity Stream for Form Responses. This will only display Forms you selected to "Show in Timelines" in the Form Builder under the **Form Settings** tab.

Click the Form response to open and review the submission.

Job Detail Overlay on the Dispatch Board

The Job Detail overlay on the Dispatch Board contains a section for Forms. If you have any Form responses associated with a particular Service type or associated with Clients, then those responses will display when you load the overlay. If you'd like to fill out a Form from the overlay, click the **Fill Out Form** button.



If a particular Job has none of the available Forms filled out, the Forms portion of the overlay will *not* expand. At the bottom of the overlay, click the **Forms** link next to "Show" or "Hide" the Forms section.

You will *not* see the **Forms** link in the Job Details overlay if you do not have Forms associated with Clients or Service types.



Reports for Forms



There is currently only one Report available for Forms. We'll be adding additional Reports as we develop them.

Accessing the Report

Make sure you give access to users who need to see the Report as all of our Reports have individual permissions. Go to the **Settings > User Roles & Rights > CRM** tab. You'll see the name of the Report at the bottom of the "CRM Reports (cont.)" column with a checkbox next to it.

To access the Report, go to **Reports > Report Center > SA Reports**.

Forms Summary Report

You can dig into individual Forms to see details of the answers given. Mousing over fields will give you help text, as well. You *are* able to view individual answers for questions, numbers for responses, and graphs of response percentages.



If your question did not have a standardized answer, such as the **Name** field then click it to expand the answers and view the list of each response.

