



Service **Autopilot**<sup>™</sup>

# NEW SA FORMS

USER GUIDE

V3

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# 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 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 then click "mark as read."
- The **Form Responses** list 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 can now 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, 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.

# 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 the Review Form overlay.
- Act on forms by selecting the checkbox 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 form. You can do this from a blank form or by using a prebuilt form template.

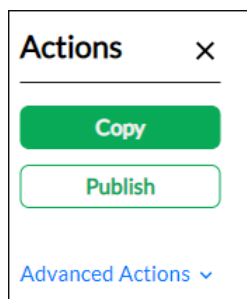
Form templates are completely customizable, so you can add to or edit all fields to meet your needs.

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

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

MARKETING Forms		SELECT A RECORD AND TAKE ACTION			
Filters	9 Forms	STATUS	NAME	DATE CREATED	DATE MODIFIED
<a href="#">All saved filters &gt;</a>	<input type="checkbox"/>	DRAFT	Complaint Form	11/14/2019	11/14/2019
<a href="#">Clear all filters</a>	<input type="checkbox"/>	DRAFT	Credit Card Denied	09/16/2019	09/16/2019
<a href="#">+ Add filter</a>	<input type="checkbox"/>	DRAFT	Credit Card On File	09/20/2019	09/20/2019
	<input type="checkbox"/>	DRAFT	Credit Card Update	09/12/2019	09/12/2019

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



- Click a checkbox 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:

Select a form template under the **Accounts** or **Team** tab, then click **Next**.

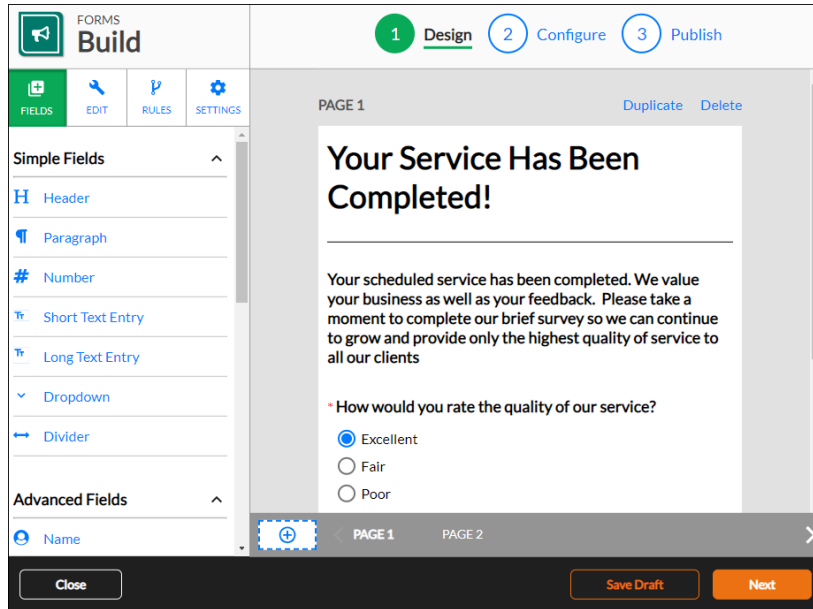
OR

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

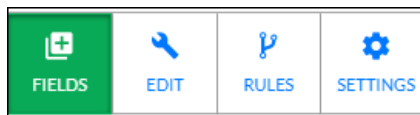
3. Type your Form name in the overlay, then click **Create**.



- 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 and lets you edit your components as shown below.



## Add Fields to a Form



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

Under the **FIELDS** tab, scroll to see the various fields you can add to your form.

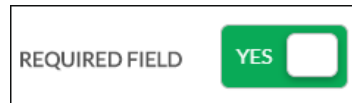
## Common Editing Options for Form Fields

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 toggle the **REQUIRED FIELD** to **ON** or **OFF**.



## Customize Form Fields

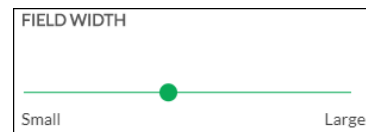
There are three sections: **Simple Fields**, **Advanced Fields**, and **Widgets**.

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

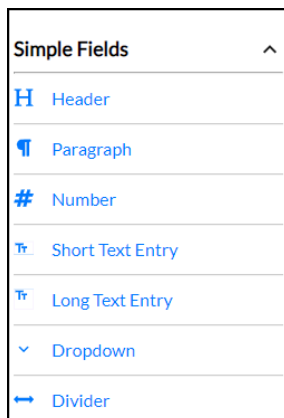
- In the right panel, click the up and down arrow buttons to change the order of the fields.



- 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 entries 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.

FIELD TYPE: Divider

COLOR: #1F1F1F

STYLE: Solid line

HEIGHT: 3 px

PADDING: Top/Bottom: 0 px, Left/Right: 0 px

Advanced ▾

**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/>

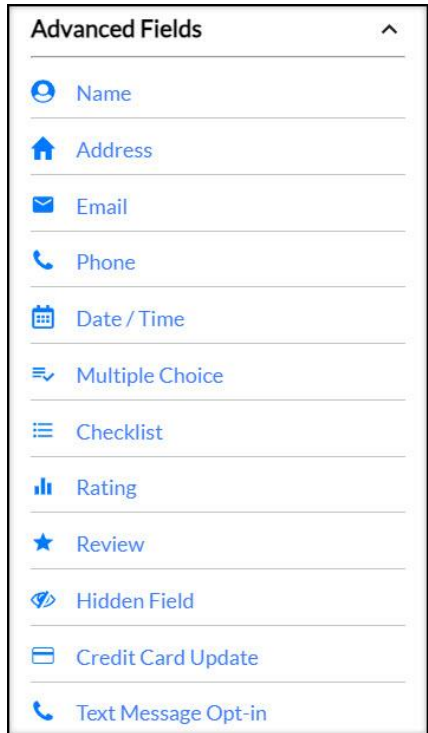
**STYLE** – Choose a solid or dotted line.

**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.

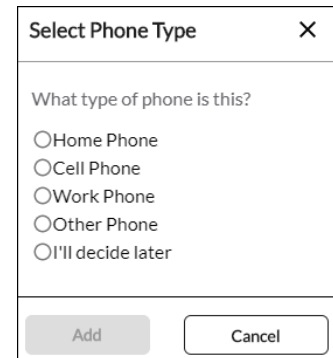
## Advanced Form Fields

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, 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.

A screenshot of a dialog box titled "Select Phone Type" with a close button (X) in the top right corner. The text inside asks "What type of phone is this?" and lists five radio button options: Home Phone, Cell Phone, Work Phone, Other Phone, and I'll decide later. At the bottom, there are two buttons: "Add" and "Cancel".

**Date/Time** - This lets the user select from the calendar tool or type in a date and 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 Multiple-Choice option.



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

**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.

**Text Message Opt-in** - This field allows users to opt-in to text messaging.

## 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 automatically be 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. Under 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.

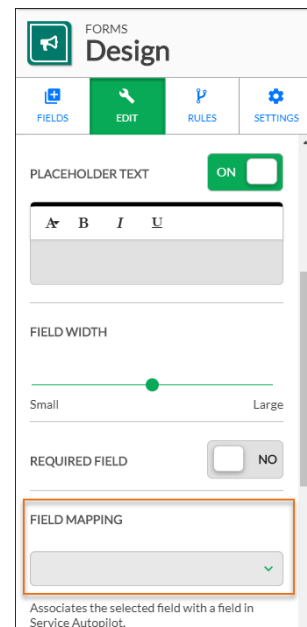
The user can select a rating from a range you specify, as shown below.



How's our service so far?

0 = Worst, 5 = Best

0	1	2	3	4	5
---	---	---	---	---	---



FORMS Design

FIELDS EDIT RULES SETTINGS

PLACEHOLDER TEXT

A B I U

FIELD WIDTH

Small Large

REQUIRED FIELD  NO

FIELD MAPPING

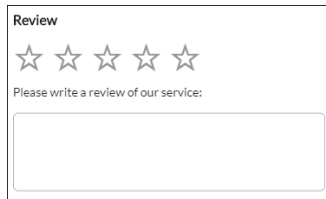
Associates the selected field with a field in Service Autopilot.

The screenshot shows the configuration interface for a Rating field in Service Autopilot. It is divided into several sections:

- DESCRIPTION:** A green toggle switch is set to "ON". Below it is a rich text editor with icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, and Link. A text box contains "0 = Worst, 5 = Best".
- REQUIRED FIELD:** A toggle switch is set to "NO".
- FIELD MAPPING:** A dropdown menu is currently empty, with a green checkmark icon at the bottom right.
- Associates the selected field with a field in Service Autopilot.** A descriptive text line.
- RATING SCALE:** A horizontal slider with a green dot at the far left (5) and a scale from 5 to 10 below it.

1. Go to the **FIELDS** tab.
2. Under **Advanced Fields**, choose **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 the 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

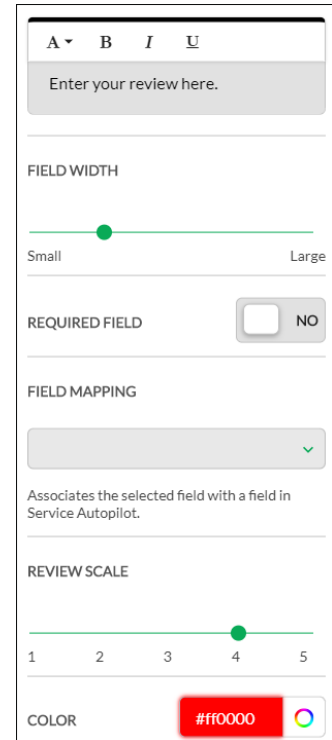


Like the “Rating” field, you can set up a star review and comment field.

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 (“Please write a review of our recent service”).
- Update the PLACEHOLDER TEXT field if needed (“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.

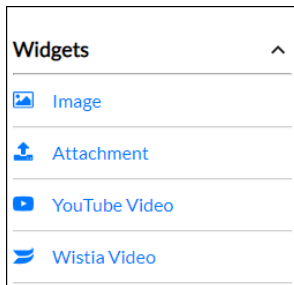


## Add a Hidden Field to a Form

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, select Hidden Field.
3. In the left panel, type any notes you want to retain in the DEFAULT VALUE box.
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

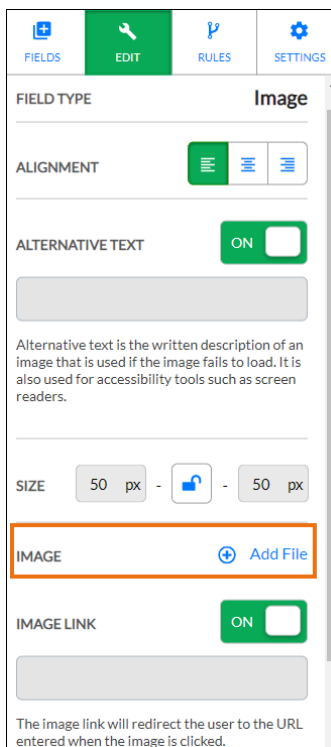
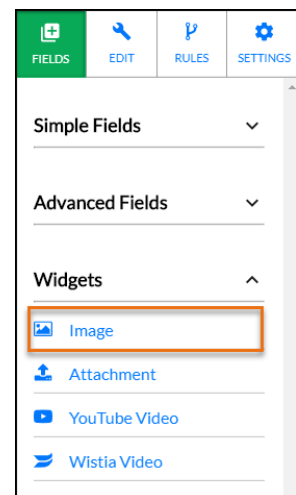


In the Widgets section of the Forms Design screen, click a widget to add it to the form. You can insert images or video links into your form and allow the user to attach a file when they submit the form.

### Add an Image to a Form

On the Forms Design screen, follow these steps.

1. Under 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:

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

1. Under the **FIELDS** tab, go to the **Widgets** section, then click **Attachment**.
2. Optionally, change the label by using the **LABEL** field in the left panel. 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. Under 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 the URL.

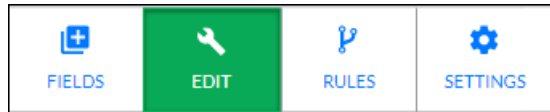
## Add a Wistia Video to a Form

On the Forms Design screen, follow these steps.

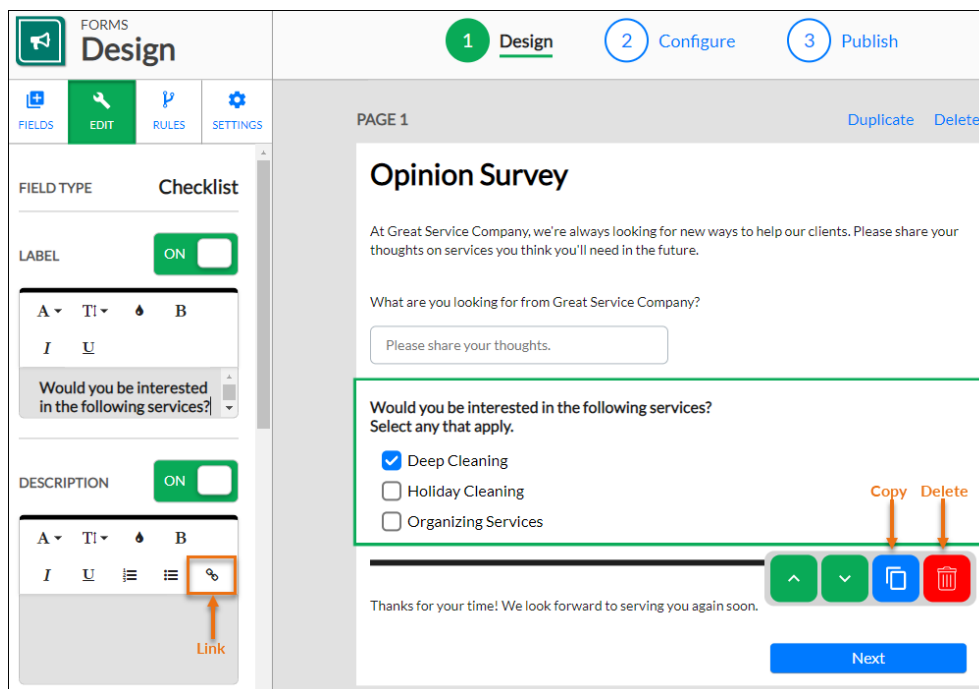
1. Under the **FIELDS** tab, go to the **Widgets** section, then click **Wistia Video**.
2. Navigate to your Wistia video and copy the web address for it.
3. In the **VIDEO URL** field, paste the web address.

## 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, select the field, then click the **Copy** button.
-  To delete a field, select 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**.



The screenshot shows the 'EDIT' tab in the left panel. The 'FIELD TYPE' is 'Navigation Buttons'. There are three sections for 'SUBMIT TEXT', 'PREVIOUS TEXT', and 'NEXT TEXT'. Each section has a 'SUBMIT TEXT', 'PREVIOUS TEXT', or 'NEXT TEXT' toggle set to 'ON'. Below each toggle is a text field with a rich text editor toolbar (A, B, I, U) and a preview area. The 'SUBMIT TEXT' field contains 'Kapow!', 'PREVIOUS TEXT' contains 'Back', and 'NEXT TEXT' contains 'Next'. At the bottom, there is a 'BUTTON COLOR' section with a blue button labeled '#007AFF' and a color picker icon.

To change the Submit button text:

1. Click the **Submit** button field in the right panel.
2. Under the **EDIT** tab in the left panel, toggle **SUBMIT TEXT** 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. Under the **EDIT** tab in the left panel, toggle **CAPTCHA** to **ON**.

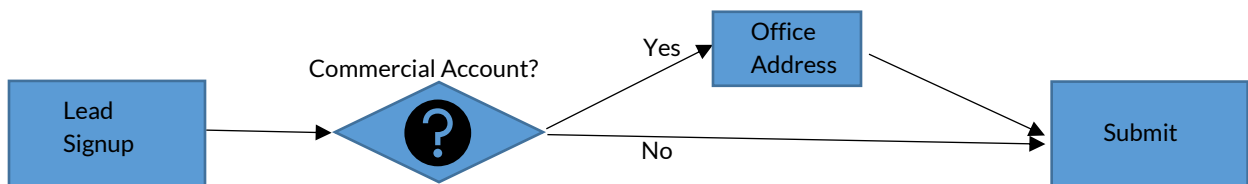
CAPTCHA assesses the user's behavior to identify suspected bots and bring up a security test.

## 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 checkbox 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



In the right panel, 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?

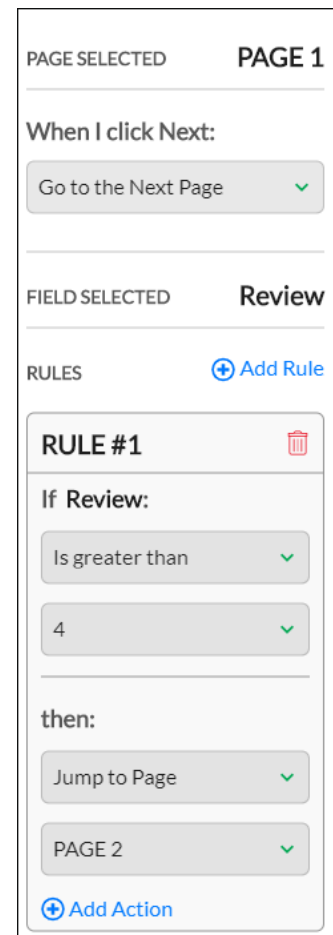


Based on responses, you can do things like display the next page or add a tag to a client.

1. Select any element on the right, so the Form Builder on the left brings up appropriate options for the element you've selected.
2. Under the **RULES** tab, choose an operator and an outcome.

For example, for a review field you might select “Is greater than” 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.



PAGE SELECTED PAGE 1

When I click Next:

Go to the Next Page

FIELD SELECTED Review

RULES + Add Rule

RULE #1

If Review:

Is greater than

4

then:

Jump to Page

PAGE 2

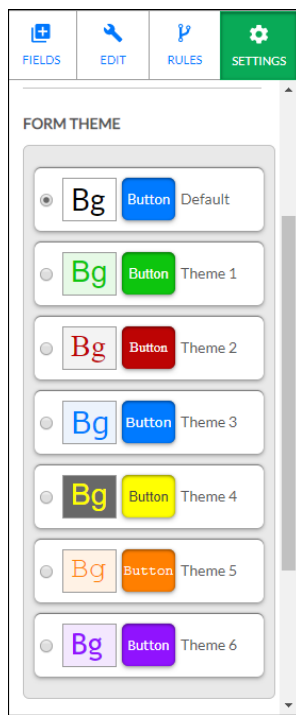
+ Add Action

## Change a Form's Appearance

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

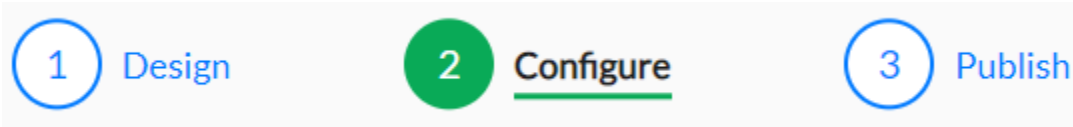


1. Enter a name for the form.
2. Select a standard *theme* to change the color scheme and fonts.



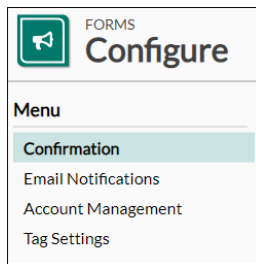
3. The CSS CLASS box is for advanced users only and lets you add a CSS class to your entire form.

## Step 2: Configure a Form



After you build a form, click **Next** or select 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 panel. 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.

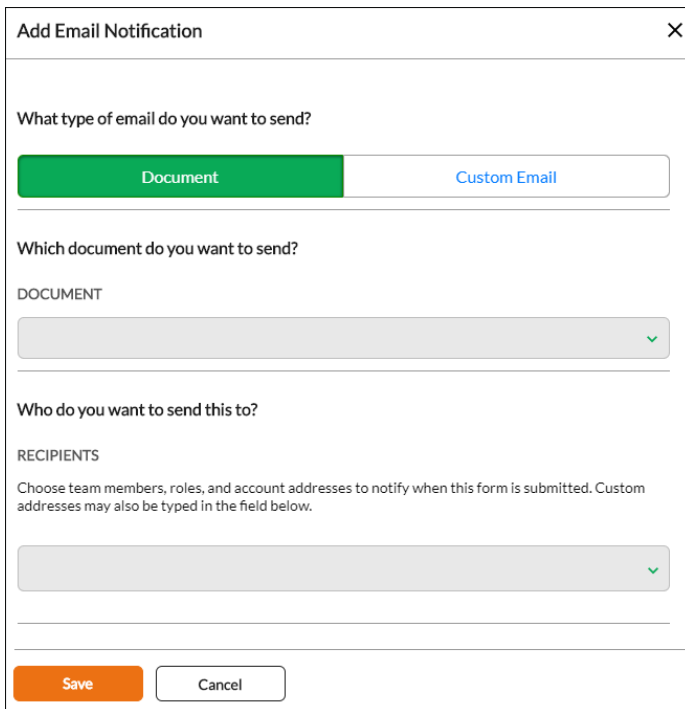
## Set Up Email Notifications for Forms

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 panel.

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.



The screenshot shows a dialog box titled "Add Email Notification" with a close button (X) in the top right corner. The dialog is divided into three main sections:

- What type of email do you want to send?**: A toggle switch with two options: "Document" (highlighted in green) and "Custom Email" (in blue).
- Which document do you want to send?**: A dropdown menu labeled "DOCUMENT" with a downward arrow.
- Who do you want to send this to?**: A dropdown menu labeled "RECIPIENTS" with a downward arrow. Below this dropdown is a text input field with a placeholder and a downward arrow. A note below the field reads: "Choose team members, roles, and account addresses to notify when this form is submitted. Custom addresses may also be typed in the field below."

At the bottom of the dialog, there are two buttons: "Save" (orange) and "Cancel" (white with a grey border).

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. Select **Custom Email**.
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.

<b>FORMS</b> <b>Configure</b>	<b>1</b> Design <b>2</b> <u>Configure</u> <b>3</b> Publish
<b>Menu</b> Confirmation Email Notifications <b>Account Management</b> Tag Settings	<b>Account Management</b> Automatically Manage Accounts <input checked="" type="checkbox"/> ON Accounts will automatically be created when a form is submitted by a new account or updated when submitted by an existing account.

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

1 Design 2 **Configure** 3 Publish

### Account Management

**Automatically Manage Accounts**

ON

Accounts will automatically be created when a form is submitted by a new account or updated w submitted by an existing account.

**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

**Matching Criteria**

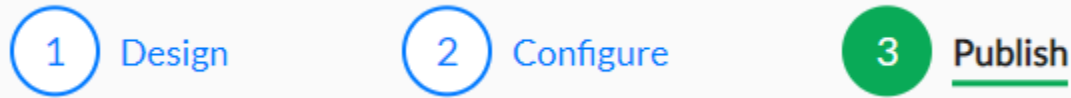
Create custom matching criteria by selecting from the fields below. The list of available fields is comprised of fields on this form which are mapped to account fields in Service Autopilot.

**SELECTED FIELDS**

Fields below will be matched on.

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.

## Step 3: 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 panel.

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.

### Warnings (3)

There are two different types of warnings:

- “MUST FIX” warnings **WILL** need to be fixed before you can publish your form.
- “SUGGESTED” warnings **WILL NOT** need to be fixed before you can publish your form.

	<b>Would you be interested in the following services? Select any that apply, has a Rule with an Empty Action</b> The field contains a rule with an empty action.	<a href="#">Fix Issue</a>
	<b>Short Text Entry with no Label</b> The form contains a field with no label.	<a href="#">Fix Issue</a>
	<b>Would you be interested in the following services? Select any that apply, with no Mapping</b> The form contains a field with no mapping.	<a href="#">Fix Issue</a>

2. Click each blue **Fix Issue** link to go to the page. You’ll see the issue highlighted.
3. After you correct 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	<b>Mobile</b>	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 checkboxes 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 checkboxes for the accounts or services you want.
2. For “Which roles can fill out this form?”

If you click **Choose**, select the checkboxes for the roles you want.

### Timesheet Action

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

If you click **Choose**, select the checkboxes 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	<b>Office</b>	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 checkboxes for the accounts or services you want.
3. For “Which roles can fill out this form?”  
If you click **Choose**, select the checkboxes for the roles you want.
4. For the next question, **All** is the default. If you click **Choose**, select the checkboxes you need.

## Publish a Form to Your Office and Mobile Devices



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.

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

For more information on setting up tags, go to your **Profile Icon > Help Center > Interactive Courses > Managing Your Clients**.

## Set Up Tags for Your Form

Under the **Configure** tab, click **Tag Settings** in the left panel.

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 include:

- Have your Crew Leaders fill out forms for jobs or procedures daily.
- 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.

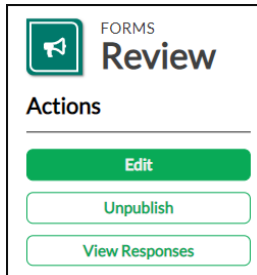
### Clock In and Out with Forms

Any forms for clocking in and out of jobs on 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, then leaves and returns several times, there will be no prompts to re-fill the clock-in and clock-out forms.



# Manage Form Responses

After your form is published, you can see the responses to it on the Form Responses list screen.



You can get to this screen two ways.

1. Go to **Marketing > Forms** and select a published form from the list.
2. In Actions menu, click **View Responses**.

OR

1. Go to **Marketing > Forms**.
2. Under the Responses column, click the response number next to your form of choice:

<input type="checkbox"/>	STATUS	NAME	DATE CREATED	DATE MODIFIED	RESPONSES
<input type="checkbox"/>	PUBLISHED	Post Service Check List	02/27/2020	02/27/2020	5

## The Form Responses List Screen

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

Filters		SELECT A RECORD AND TAKE ACTION 5 Responses						
<input type="checkbox"/>	STATUS	NAME	DATE SUBMITTED	SUBMITTED BY	RELATED ITEM	FORM LOCATION	RESULTS	
<input type="checkbox"/>	ON HOLD	Post Service Check List	02/17/2023	Elle Palmer	Adamson, Adam	Office		
<input type="checkbox"/>	ON HOLD	Post Service Check List	02/17/2023	Elle Palmer	Rose, Johnny	Office		
<input type="checkbox"/>	ON HOLD	Post Service Check List	02/17/2023	Elle Palmer	Rose, Alexis	Office		
<input type="checkbox"/>	ON HOLD	Post Service Check List	02/17/2023	Elle Palmer	Williams, Kalarie	Office		
<input type="checkbox"/>	ON HOLD	Post Service Check List	02/27/2020	Elle Palmer	Drew Brees	Office		

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.

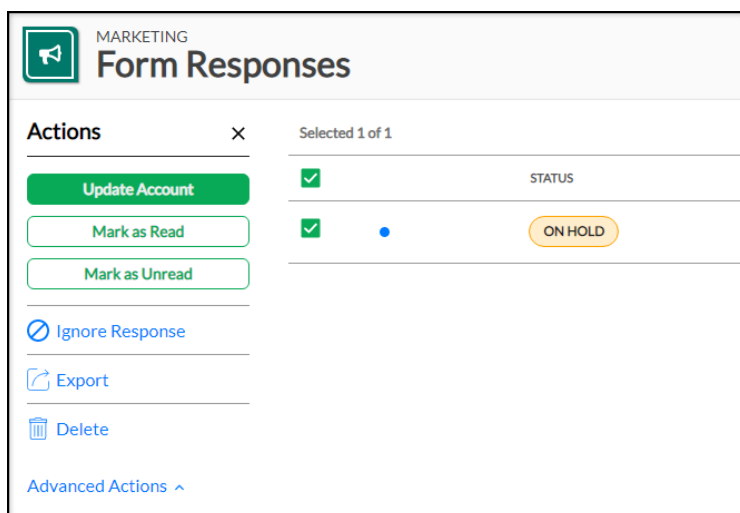
- See which forms you have read or not read. A blue dot on the left side of a row means it's unread.
- Mark a record as read or unread. When you open a form response, it's automatically marked as Read. But on the Forms Responses list, you can also select the checkbox for a response then click **Mark as Read** or **Mark as Unread**.
- Manage Form Responses – Click the name of a form to see the Review Form Response screen, 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 can also download a copy to save for your reference.
- 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.”

As with other screens, blue text is a clickable link. Filters can be found on the left and your list of Form Responses can be found on the right. Click **All saved filters** to view a list of Common Filters. Any views you create will also appear here under "Added by me".



If there are specific responses you want to see, it's a good idea to create your own view by using the provided filters. Once you've added your desired filters, click **Save** to give your view a name.

Select the checkbox for one or more Responses to reveal the Actions menu.

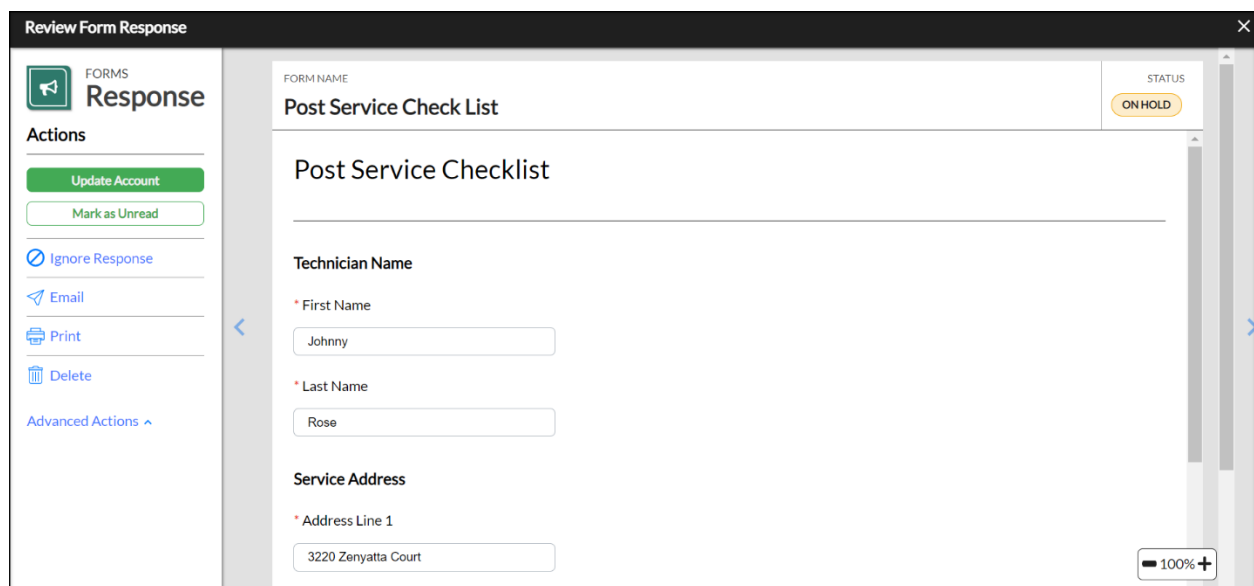


From here, you can:

- **Update Account** - Edit existing data fields with the new data from your selected Form.
  - **Replace All** - Replace all fields when the form is submitted.
  - **Add New** - Only update fields that do *not* already have info in them.
  - **Manual** - Allows you to pick specific fields that will update every time.
- **Mark as Read** - Mark a Form Response as read.
- **Mark as Unread** - Mark a Form Response as Unread.
- **Ignore Response** - Mark a Form Response as Ignored.
- **Export** - Export your selected Form Responses.
- **Delete** - Delete your selected Form Responses.

### Review Form Response Overlay

From the Form Responses list screen, select the name of the Form to open the Review Form Response overlay:



The screenshot shows a 'Review Form Response' overlay window. On the left is a sidebar with a 'FORMS Response' header and an 'Actions' menu containing: 'Update Account' (green button), 'Mark as Unread' (green button), 'Ignore Response' (blue link), 'Email' (blue link), 'Print' (blue link), 'Delete' (blue link), and 'Advanced Actions' (blue link with a dropdown arrow). The main content area displays the form details for 'Post Service Check List'. At the top right, the status is 'ON HOLD'. The form fields are: 'Technician Name' with sub-fields for 'First Name' (Johnny) and 'Last Name' (Rose); and 'Service Address' with 'Address Line 1' (3220 Zenyatta Court). A zoom level of '100%' is shown in the bottom right corner.

From here, you can:

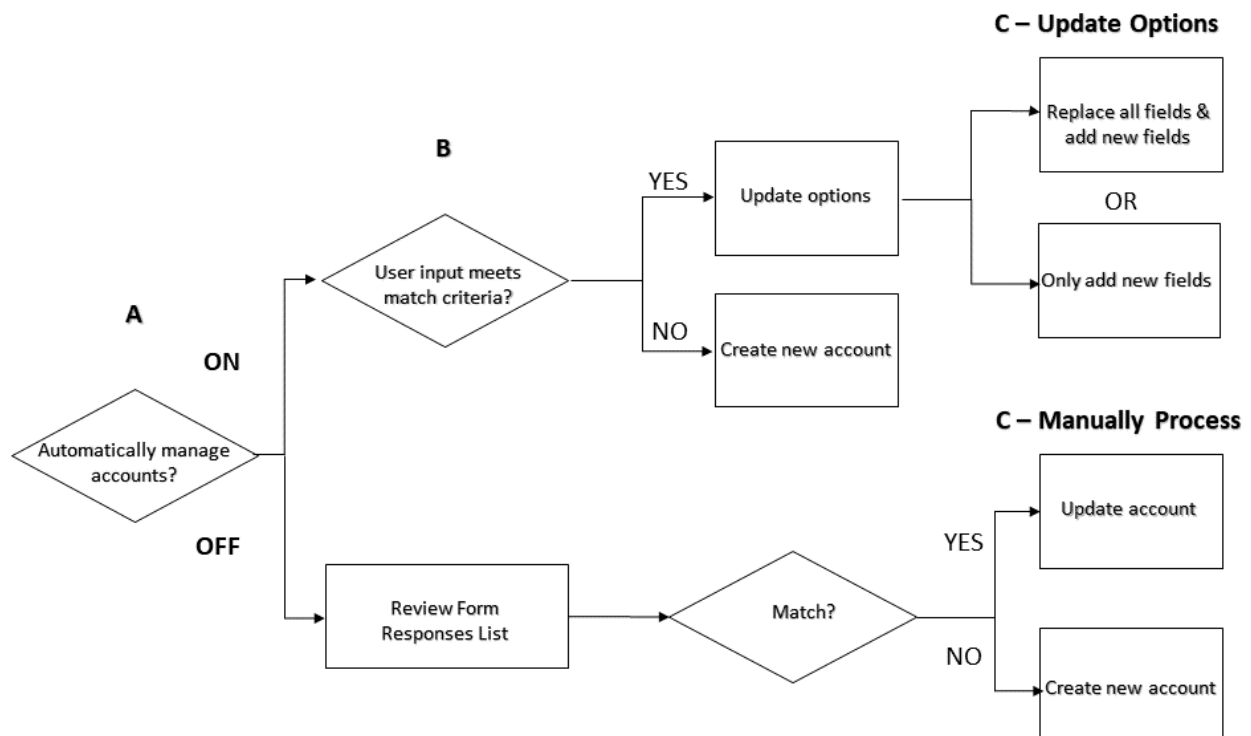
- **Update Account** - Update Account fields when Forms are submitted:
  - **Replace All** - Replace all fields when the form is submitted.
  - **Add New** - Only update fields that do *not* already have info in them.
  - **Manual** - Allows you to pick specific fields that will update every time.
- **Mark as Unread** - Mark the Form Response as Unread.
- **Ignore Response** - Mark the Form Response as Ignored.
- **Email** - Email the Form Response.
- **Print** - Print the Form Response.

- **Delete** - Delete the Form Response.

## 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 panel.

## If you set “Automatically Manage Accounts” to ON:

The screenshot shows the 'Configure' interface for 'FORMS'. The top navigation bar includes '1 Design', '2 Configure' (highlighted), and '3 Publish'. The left sidebar menu lists 'Confirmation', 'Email Notifications', 'Account Management' (highlighted), and 'Tag Settings'. The main content area is titled 'Account Management' and contains three sections: 'Automatically Manage Accounts' with a toggle switch set to 'ON' and a description; 'Update Options' with a dropdown menu set to 'Replace all existing fields and add new fields'; and 'Account Matching' with a dropdown menu set to 'First OR last name AND email matches'.

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 only add 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 the system to use when comparing an existing record against a user's input. Think about 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 checkboxes for each.

### Example of Account Matching

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:

The screenshot shows the 'Configure' page for 'FORMS' in Service Autopilot. The page is divided into three steps: 1 Design, 2 Configure (current), and 3 Publish. The left sidebar contains a 'Menu' with options: Confirmation, Email Notifications, Account Management (selected), and Tag Settings. The main content area is titled 'Account Management' and includes the following sections:

- Automatically Manage Accounts:** A toggle switch is set to 'OFF'. Below it, a note states: 'Accounts must be manually created or updated from this form's response list after it is submitted.'
- Account Matching:** A dropdown menu is set to 'Other'. The text above it asks: 'When should a form response be matched to an existing account?'
- Matching Criteria:** A section with the instruction: 'Create custom matching criteria by selecting from the fields below. The list of available fields is comprised of fields on this form which are mapped to account fields in Service Autopilot.'

At the bottom, there is a section labeled 'SELECTED FIELDS' with the text 'Fields below will be matched on.'

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'll then need to go to the Form Responses list to manually review each form response and decide how to handle it.

Open a response by clicking the blue title.

MARKETING		Form Responses					Edit Columns	Fill Out Form
Filters	2 Responses	SELECT A RECORD AND TAKE ACTION						
	<input type="checkbox"/>	STATUS	DATE SUBMITTED	NAME	SUBMITTED BY			
<a href="#">All saved filters &gt;</a>	<input type="checkbox"/>							
<a href="#">Clear all filters</a>	<input type="checkbox"/>	<span>ON HOLD</span>	03/05/2020	<a href="#">Net Promoter Survey</a>	Rock, The			
<a href="#">+ Add filter</a>	<input type="checkbox"/>	<span>ON HOLD</span>	03/05/2020	<a href="#">Net Promoter Survey</a>	Hogg, Ima			

1. Optionally, scroll through the form by clicking the arrows.
2. Choose one of the options under Actions:
  - Update Account
  - Create Account
  - Mark as Unread

FORMS		Response
<b>Actions</b>		
<span>Update Account</span>		
<span>Create Account</span>		
<span>Mark as Unread</span>		
<input checked="" type="checkbox"/> Ignore Response		
<input type="checkbox"/> Delete		
<a href="#">Advanced Actions &gt;</a>		

3. For Update Account, choose one of the following:

Updating Existing Account ×

Account

Ima Hogg ▼

How would you like to update Ima Hogg Account?

Select which data you would like to update with

[Replace All](#) [Add New](#) [Manual](#)

DATA FIELD	OLD	NEW
Contact Email	bacon@gmail.com	ima@gmail.com
Home Phone	1112223333	9724434555
Service Address Line 1	705 Johnson Lane	205 County Line Road
Service Address Line 2	Suite 200	
Service City	Ovilla	Mckinney
Service Postal Code	75080	75069

4 other fields will not be updated.

[Update](#) [Cancel](#)

- **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 of the checkboxes below.

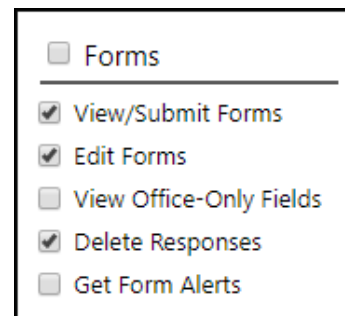
### View/Submit Forms

Users can see the Form and Form responses on the Activity Stream, 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 to create and save Forms, or to 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.



<input type="checkbox"/>	Forms
<input checked="" type="checkbox"/>	View/Submit Forms
<input checked="" type="checkbox"/>	Edit Forms
<input type="checkbox"/>	View Office-Only Fields
<input checked="" type="checkbox"/>	Delete Responses
<input type="checkbox"/>	Get Form Alerts

### Delete Responses

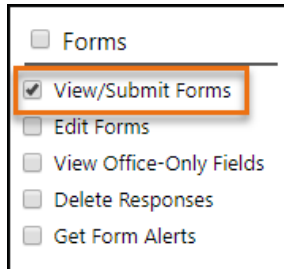
Users can remove any Form response containing information you'd prefer not to keep in SA, such as personal or security information.

### 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

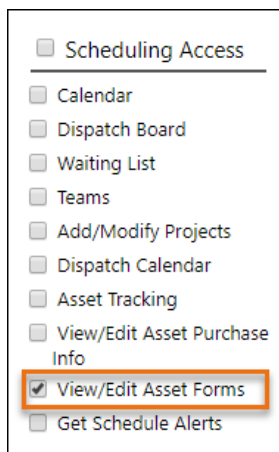
Under **CRM > Forms**, you can set limited permissions by selecting only the “View/Submit Forms” checkbox:



A screenshot of a permissions menu. The menu is titled "Forms" and has a horizontal line below the title. Below the line, there are five items, each with a checkbox: "View/Submit Forms" (checked), "Edit Forms", "View Office-Only Fields", "Delete Responses", and "Get Form Alerts". The "View/Submit Forms" checkbox is highlighted with an orange border.

## Enable Forms for Team App Users

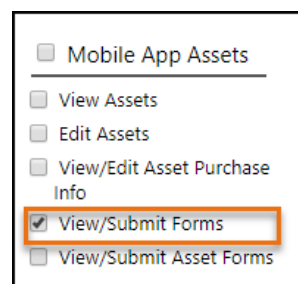
For Team app users who will use Forms, set permissions on two tabs under **Settings**.



A screenshot of a permissions menu titled "Scheduling Access" with a horizontal line below the title. Below the line, there are ten items, each with a checkbox: "Calendar", "Dispatch Board", "Waiting List", "Teams", "Add/Modify Projects", "Dispatch Calendar", "Asset Tracking", "View/Edit Asset Purchase Info", "View/Edit Asset Forms" (checked), and "Get Schedule Alerts". The "View/Edit Asset Forms" checkbox is highlighted with an orange border.

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 checkbox for “View/Edit Asset Forms”.

4. Go to the **Mobile** tab.
5. In the “Mobile App Assets” column, select the checkbox for “View/Submit Forms”.



A screenshot of a permissions menu titled "Mobile App Assets" with a horizontal line below the title. Below the line, there are five items, each with a checkbox: "View Assets", "Edit Assets", "View/Edit Asset Purchase Info", "View/Submit Forms" (checked), and "View/Submit Asset Forms". The "View/Submit Forms" checkbox is highlighted with an orange border.