GETTING STARTED
Guide

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SOFTWARE

GETTING STARTED GUIDE

CONTENTS

WELCOME!

The **iFormBuilder Getting Started Guide** will walk you through your first iFormBuilder project and demonstrate the major features of iFormBuilder.
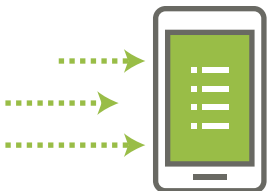
Use this guide as a reference for getting started with the iFormBuilder Platform. You will learn everything from adding new users, to building your first form, to collecting your first record from the device. This guide gives a high-level overview on all the steps needed to get your first project successfully under way.

QUICK START IN THREE STEPS

1. CREATE

Build your first form at **app.iformbuilder.com**

2. COLLECT

Gather data using the iForm App on your mobile device

3. CONSUME

View, Export, and Integrate Data at **app.iformbuilder.com**

THE iFORMBUILDER PROCESS

Using your web browser and mobile device, create and implement forms for field data collection

CREATE

1 Create forms at **app.iformbuilder.com**

2 Use different element types to make your forms more dynamic

3 Customize forms by adding Smart Controls

4 Assign users to the forms

COLLECT

5 Download the iForm app on your Android or iOS device

6 Log in to the app and sync the device to download your forms

7 Collect data on your forms — with or without a connection

CONSUME

8 Sync data to the iFormBuilder cloud once a connection is available

9 View, export, and edit data at **app.iformbuilder.com**

10 Integrate your data and automate your workflow using the API

① CREATE
Build your first form at app.iFormbuilder.com

iFormBuilder Agent Tips for Building Forms

▶ **Berit's Tip:** "Use a naming convention to help organize forms in form builder. This way all connected forms will be located in the same section and you will be able to tell what form is a subform and what form is a parent form at a quick glance."

WATCH THE FORM BUILDING VIDEO TUTORIAL

Build forms, manage users, and access your iFormBuilder account at **app.iformbuilder.com**. Login using the username and password provided in your email.

Let's build your first form!

iFormBuilder offers over **40+ different element input types** to help collect good data and cut down on human error. In the Admin Control Panel, visit the "Forms" tab and select the "Form Builder" page to start.

Step 1. Select "Create New Form," on the Form Builder home page. Once on the **"Edit Form Properties"** page, type a Form Name and click "Save Changes."

Step 2. Click "Add New Input" in the left screen and modify the Input to suit your needs on the right.

To make your form more dynamic, try applying the following element input types and features to your form: **Subforms**, **Option Lists**, **Images**, Drawing (**Annotation Feature** included) **Hardware Integration**, **Manatee Works** for scanning or the **Esri** (GIS) input type. Add calculations, skip logic and client validation using the **Smart Controls**. Pre-Populate form fields by using a **Smart Table Search**.
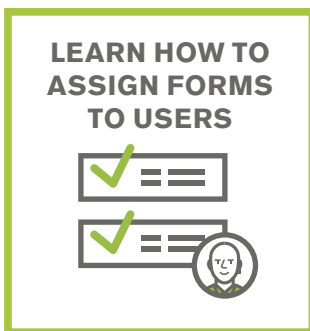
① CREATE

Assign forms to users

iFormBuilder Agent Tips for Building Forms

▶ **Ben's Tip:** "Always test your form before going live. As you build your form, have a device readily available to test your forms functionality. I suggest testing it on the smallest device that your team will be using. You always want to double check that the form is looking and working the way you want it to."

LEARN HOW TO
ASSIGN FORMS
TO USERS

Learn How to Assign Forms to Users

After Building a form, you will need to assign the form to your field users. In the "**Form Assignment**" page, under the Form tab, you can determine which form(s) to assign to a specific user or group of users.

Step 1. Select the Form or Form Group you wish to assign and click "Assign" in the top left corner.

Please note: If you have built a form with subforms, you will only need to assign the Parent form to users.

Step 2. In "Form Assignment" page, you have the option of granting a user "Collect" and/or "View" rights to a Form or **Form Group**. If you only want the user(s) to collect data on their device for the form, you will check the box "Collect." If you only want the user to have access to view all of the completed records for the form you will select "View."

① CREATE

Explore more of the platform

iFormBuilder Agent Tips for Building Forms

▶ "If you are building forms or importing form packages, all forms that you build or import will automatically be assigned to your username. If you wish to hide these from view on your device, you must un-assign the forms under Form Assignment."

Once you are logged in, you will see a navigation bar that includes the Data, Forms, Users, Company and Support tabs. To learn more about Forms, Users and Company Management click on the links below.

The Data integration options will be described in detail on page 9 of this guide.
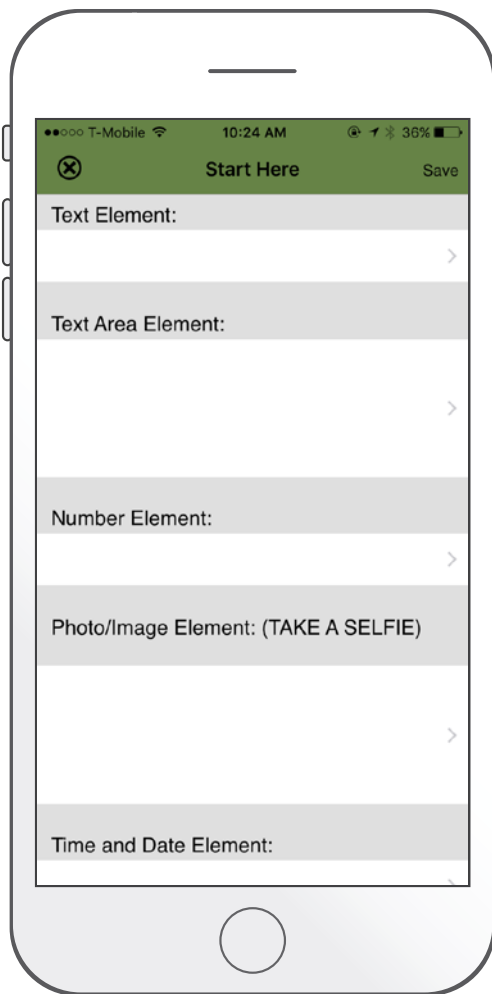
Visit the links below to discover more.

FORMS	USERS	COMPANY
• Form	• Notifications	• Company
• Form Builder	• Add/Edit	• License
• Form Group	• My Profile	
• Localization	• User Groups	
• Scoring		
• Form Packages		

② COLLECT

Collect data using iform app on your mobile device

You've built your first form. Now let's capture data on your form.

Step 1. Download the app from the **Google Play Store** or the **Apple App Store**.

Step 2. Login to the app using the username and password provided in your confirmation email (the same username and password login for **iFormBuilder.com**).

Once you tap sync or login, all forms and records that have been assigned to your username will be brought down to the device. Once on the device, an internet connection is not required to collect data.

Select your first form and fill in appropriate fields. When finished, tap "Done/Submit." The record will sync with the iFormBuilder cloud and be made available for you to view at **app.iformbuilder.com**

If using an iPad and have "View" rights for the form, you will also be able to use the "Manage" tab on the device to view submitted records.

③ CONSUME

View, filter, edit, export, and integrate data at iFormBuilder.com

TOUR THE APP

Now that you have built your first form, and successfully captured your first record, it is time to view, export or integrate the data collected. When you first login to your **app.iformbuilder.com** Admin Control Panel, the. Once data has been synced from the device, it will be immediately available in a variety of **Data Views** and **Data Feeds**.

FILTERS	DATA VIEWS	DATA FEEDS
• Stored Filters	• List	• XLS
• Table Edit	• Map	• XLS+(Excel Flat)
	• Graph	• XML
	• HTML	• JSON
	• Excel	• RSS
	• Excel Flat	• ATOM
	• Scoring	• JSON Scoring
	• PDF	

NOTE: Other options for your data include assigning a POST to a web service or building a custom workflow with the iFormBuilder API.

HOW CAN WE HELP?

The iFormBuilder platform is built to be "Do-It-Yourself" but you don't have to! Customer Success is at the core of everything we do. Our mobile experts are available to assist with form building, custom integration projects and workflow solutions consulting. While on the web interface, the Walk Me Through tool provides step-by-step instruction of the platform. At every step of the way, we are at your side!

CUSTOMER SUCCESS CENTER

Access our iFormBuilder Academy, Knowledge Base, Getting Started Tutorials and Community Forum by visiting the **iFormBuilder Customer Success Center**.

LIVE CHAT

Join a "Live Chat" session at the bottom of any iFormBuilder page. Ask questions, discover resources or just stop by to say "Hello!"

JOIN A WEBINAR

Join a Webinar or Guided Tour with one of our Customer Success Gurus. Register for a Guided Tour hosted every other Wednesday at 11:00 am Eastern.

IMPLEMENTATION SUPPORT

Need assistance building out your forms or launching a pilot? Contact us at **customersuccess@zerionsoftware.com**.

TRAINING & CERTIFICATION

iFormBuilder Academy has developed a course catalogue that includes a list of all the courses offered. **View** the catalogue. For pricing information, please contact **sales@iformbuilder.com**

FREQUENTLY ASKED QUESTIONS

How do I upgrade my account?
Contact us at **sales@zerionsoftware.com**.

What is a Dedicated Database?
A dedicated database is for the growing company with multiple projects or departments leveraging the iFormBuilder platform. The dedicated database provides the ability for companies or organizations to create separate profiles where all forms, data and users for one group or project are kept separate from other groups or projects on the account.

The dedicated database also includes access to the iFormBuilder API. The API provides the ability for bi-directional data integration between iFormBuilder and other web services, systems and third party platforms. **Learn More**

Interested in upgrading your account, or adding a dedicated database?

Please contact
sales@zerionsoftware.com
for more information.