FORM DESIGNER GUIDES · 3 OF 3

Bring in a form you already use

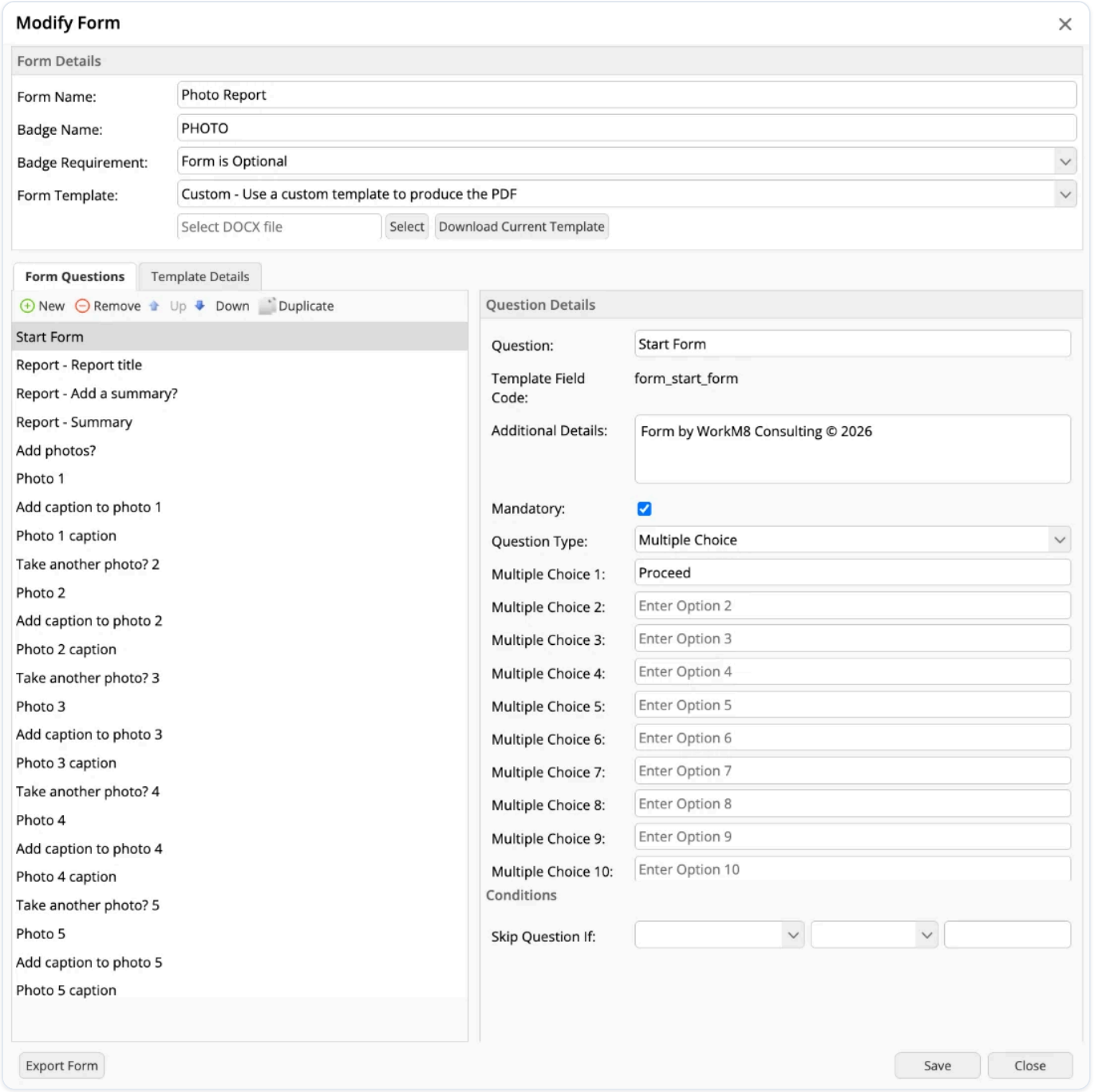
Open a form you already use in ServiceM8: what comes in, how to compare it, Tidy a converted form and Apply a look, then download it and import it again.

You don't have to start again. Open a form you already use, and its questions, its rules and its Word layout come in. Then tidy the page, give it a new look, and import it again.

The questions keep their names, so their field codes stay the same.

1. Export the form from ServiceM8

1. In ServiceM8, go to **Settings**, then **Forms**.
2. Press **Open Form** on the form you want.
3. In the **Modify Form** box, press **Export Form** at the bottom left, and save the file on your computer.
4. Press **Close**. Don't press Save: nothing in ServiceM8 needs to change.

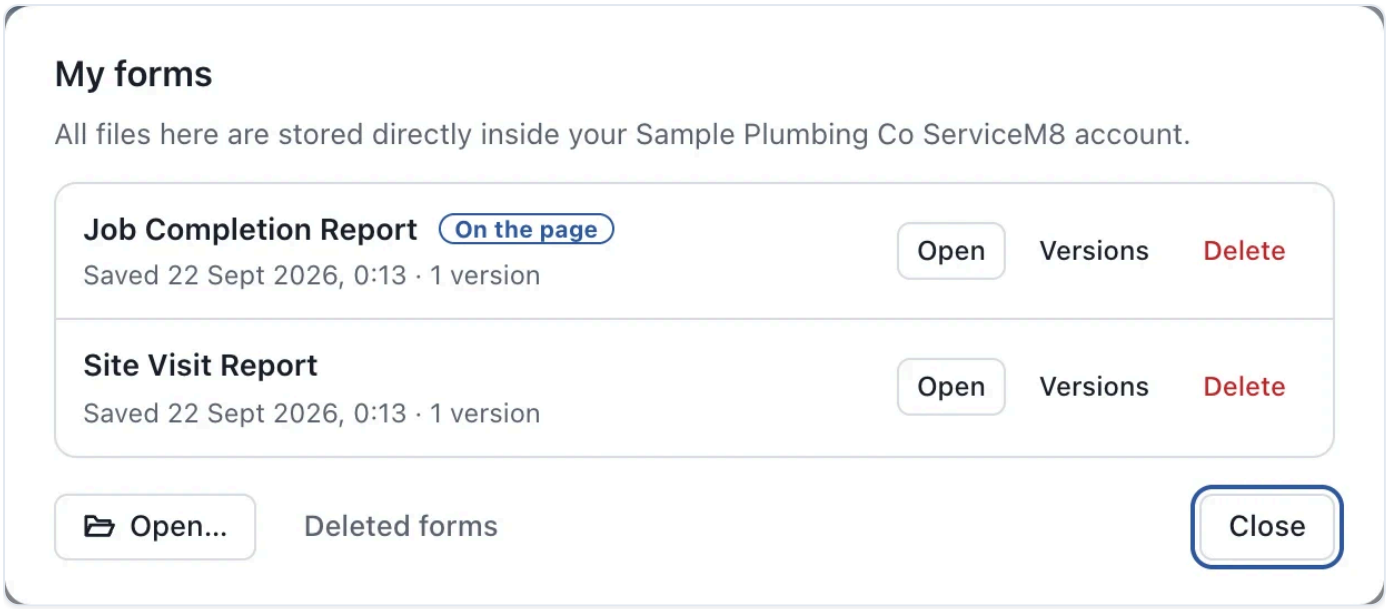


The Modify Form box in ServiceM8. Export Form is at the bottom left.

A form from the ServiceM8 Form Store can't be opened in Form Designer. See the end of this guide.

2. Open it in Form Designer

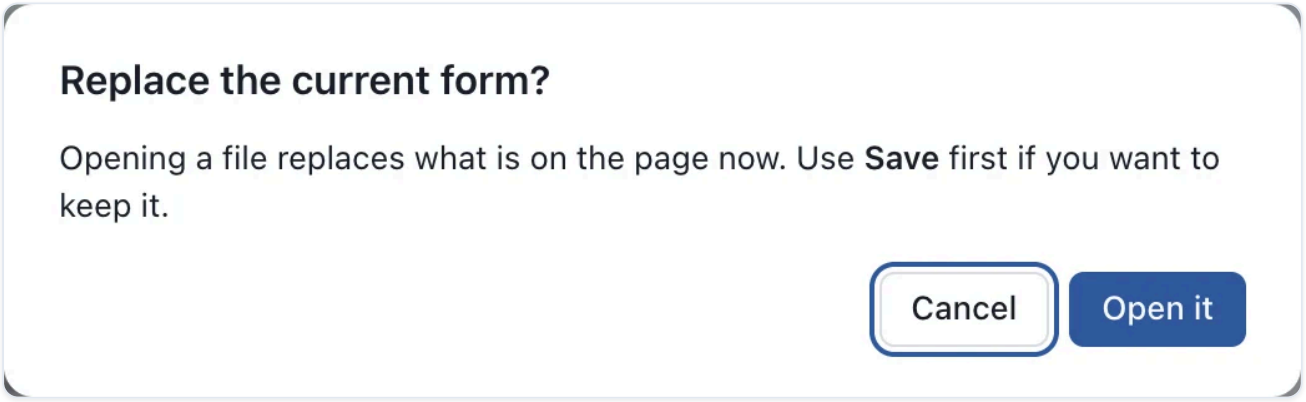
Press **Open** in the top bar. The **My forms** box shows the forms you saved, and an **Open...** button for a file on your computer.



My forms, with the Open... button.

Press **Open...** and pick the .sm8f file.

If a form is on the page already, Form Designer asks first. Press **Save** before, if you want to keep the form on the page.

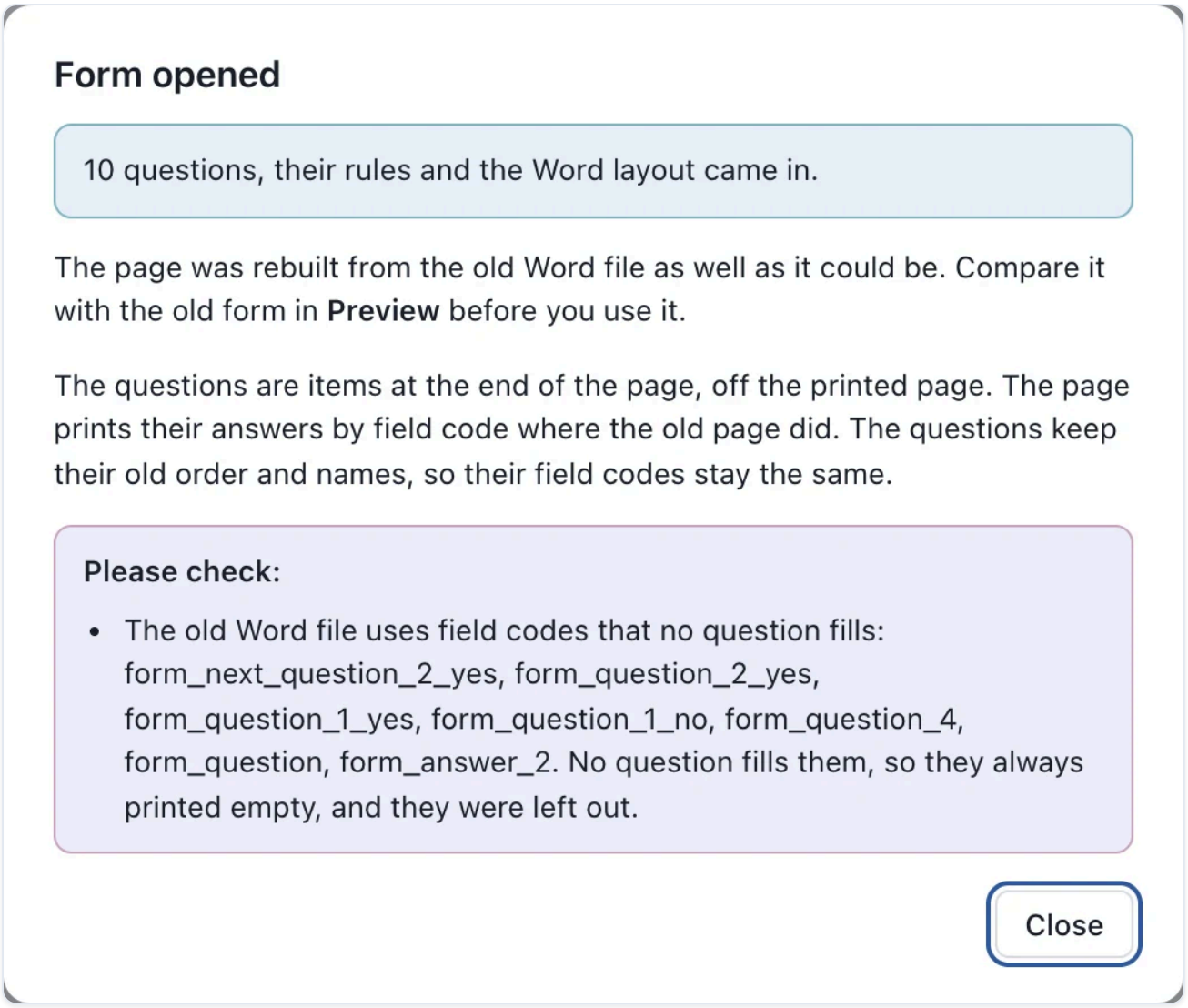


Replace the current form?

Press **Open it**.

3. Read what came in

The **Form opened** box says what came in, and what to check.

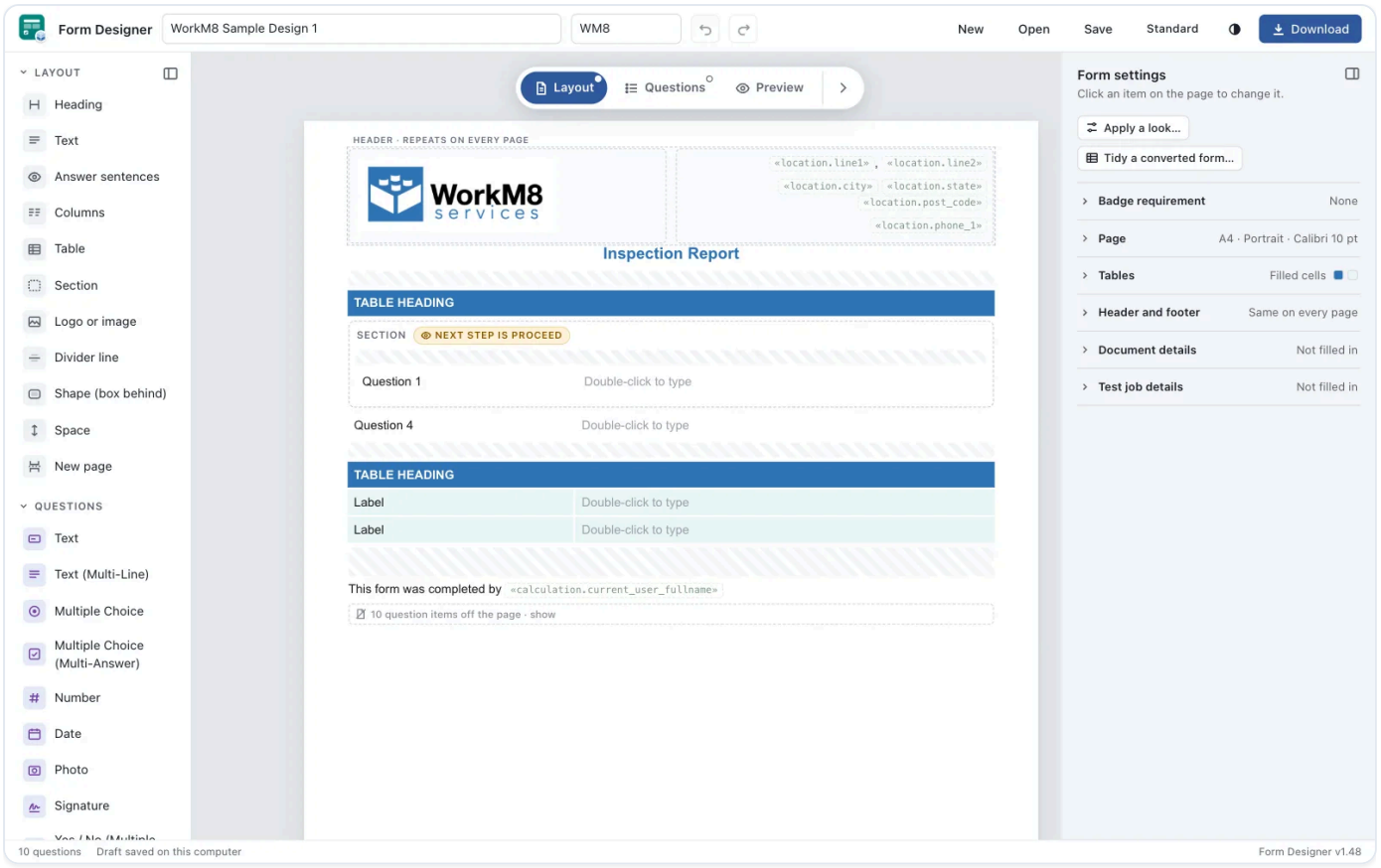


Form opened: 10 questions, their rules and the Word layout came in.

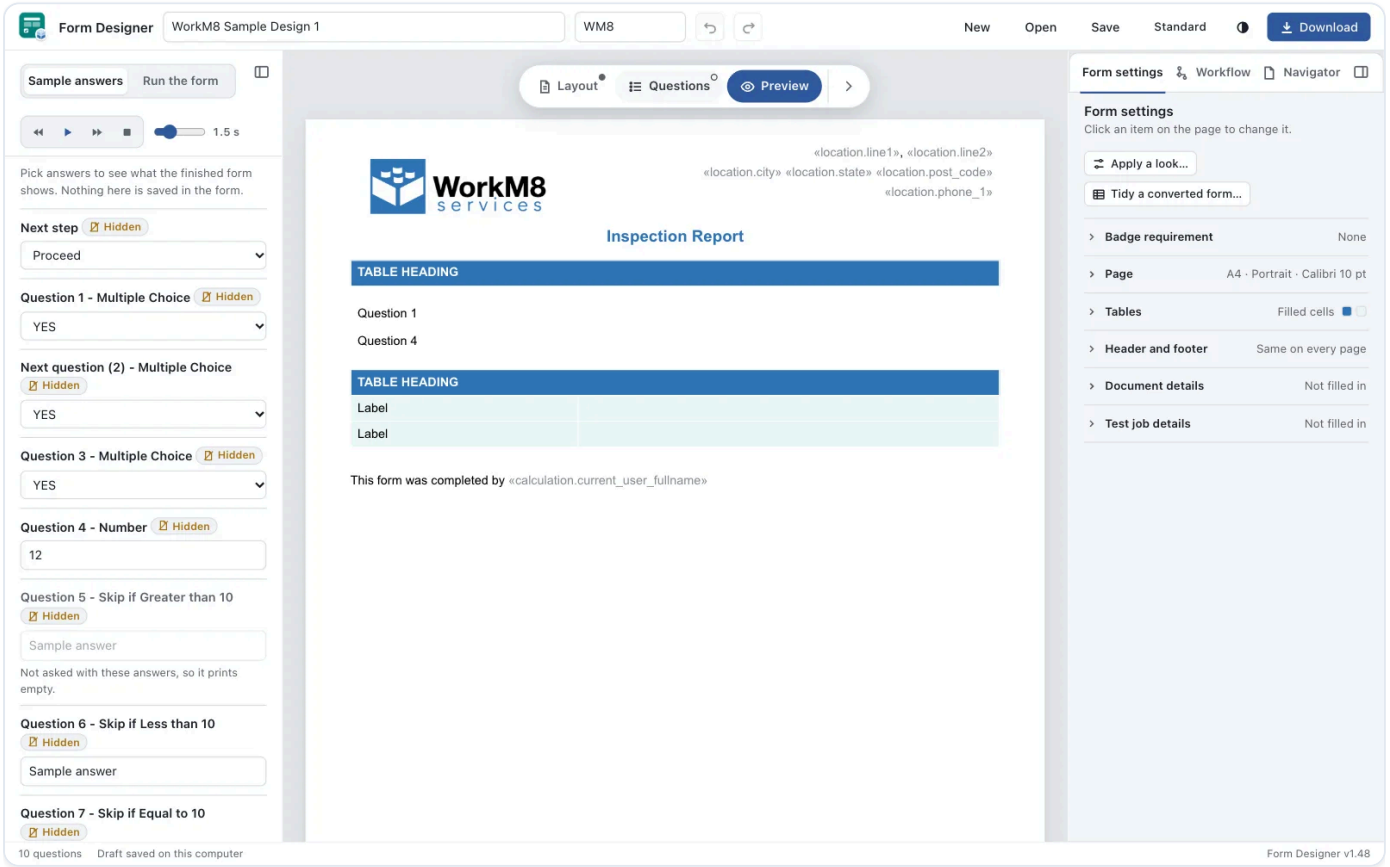
- A form made in Form Designer comes back complete: the layout, the questions, the rules and the pictures.
- Any other form: the questions and their rules come in, and the page is rebuilt from the old Word file **as well as it could be**.
- The **Please check** list names anything that needs a look. In this example, the old Word file had field codes that no question fills. They always printed empty, so they were left out.

4. Compare it in Preview

Look at the page in **Layout**, then click **Preview** in the dock. Put the old PDF beside it and compare them.



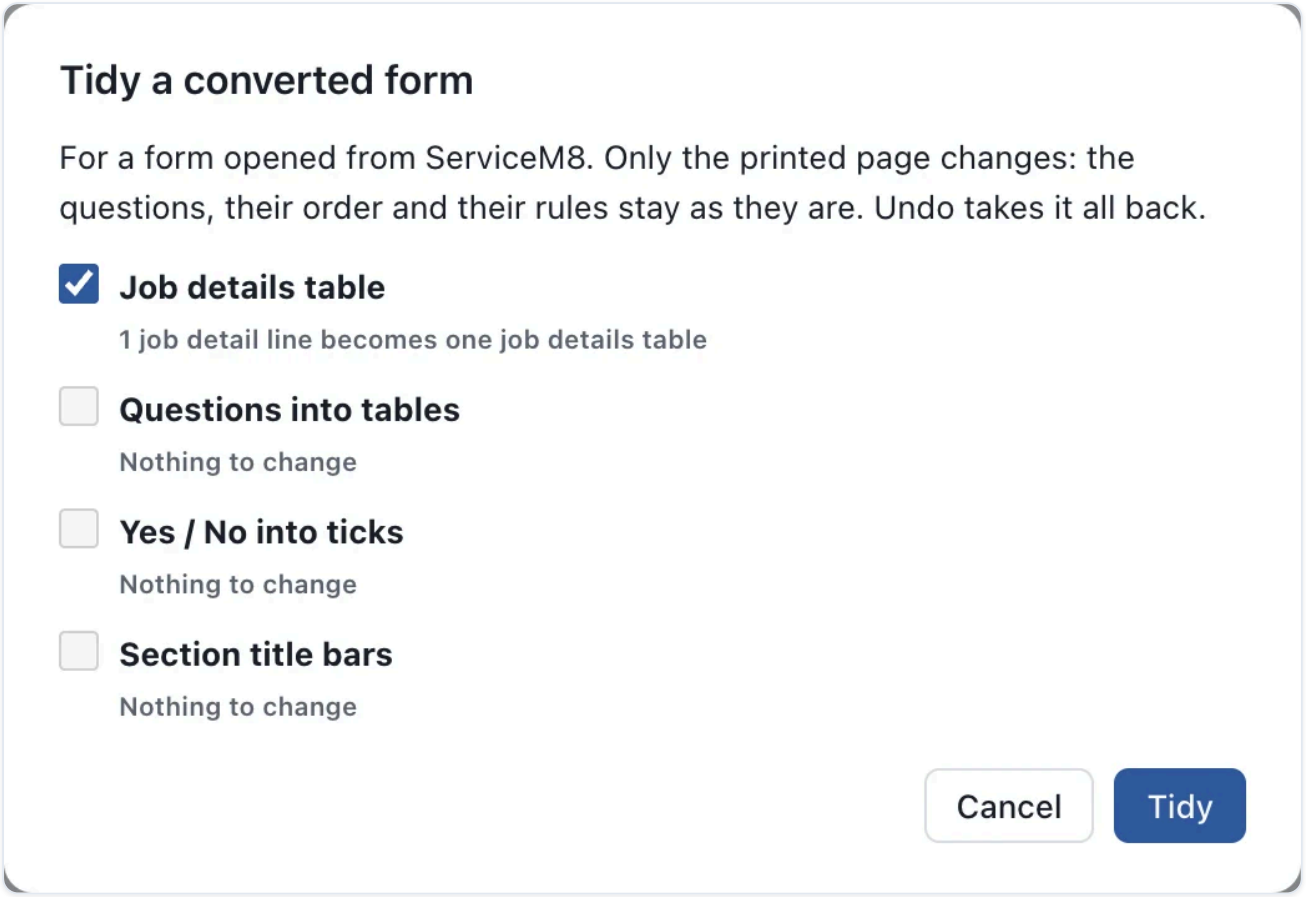
The form as it came in, in Layout.



The same form in Preview, with sample answers.

5. Tidy the page

On the right, under **Form settings**, press **Tidy a converted form...**.



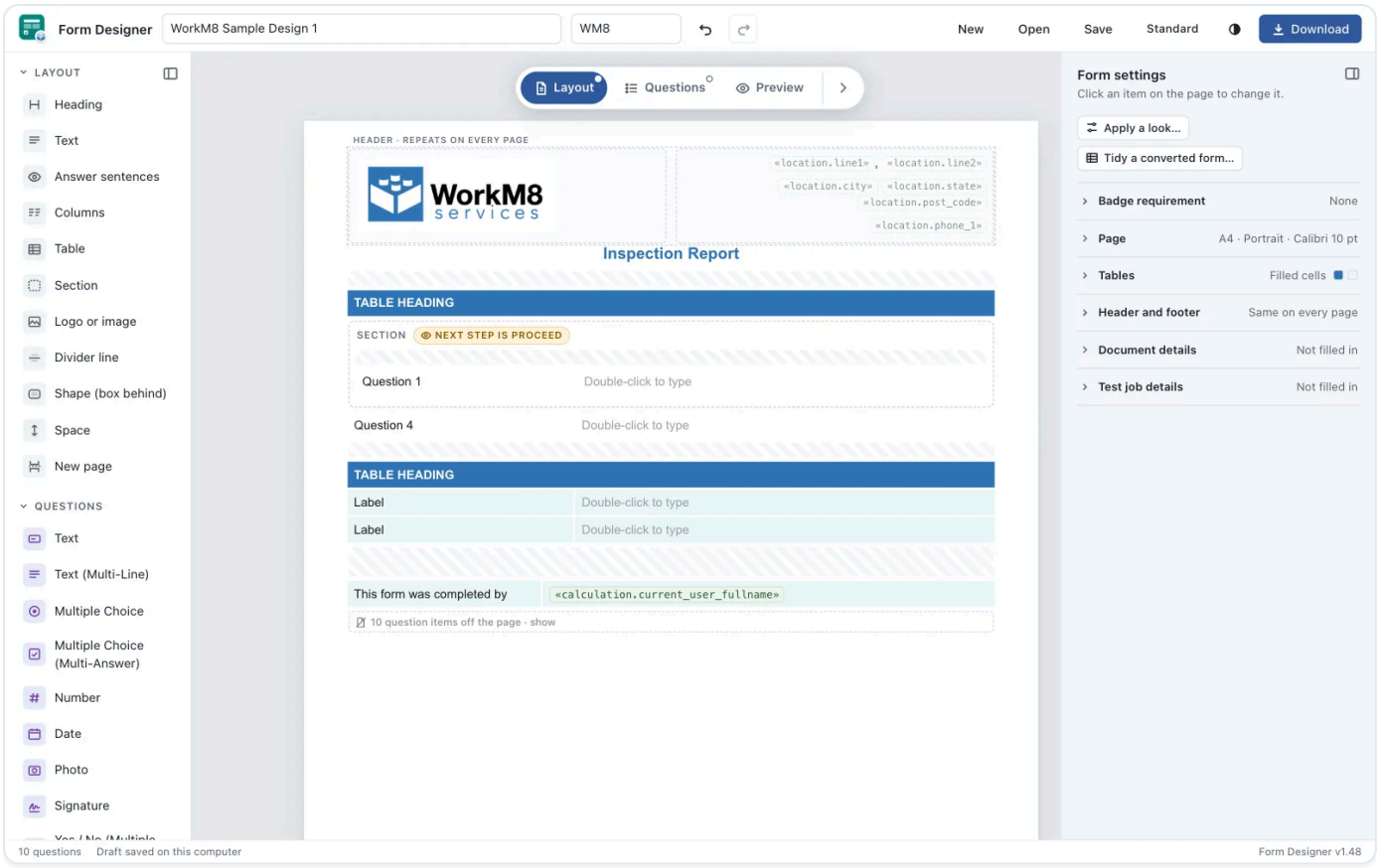
Tidy a converted form.

It offers up to five changes. Each one says how many items it would change:

- **Job details table**: job detail lines become one tidy table.
- **Add a job details table**: when the form has none, it adds Client, Site address, Job number, Completed by and Date under the title.
- **Questions into tables**: labels and answers become table rows.
- **Yes / No into ticks**: Yes/No and Pass/Fail answers print as a tick, a cross or a dash.
- **Section title bars**: groups of questions become sections with a coloured title bar.

A change with **Nothing to change** is greyed out. Only the printed page changes: the questions, their order and their rules stay as they are. **Undo** takes it all back.

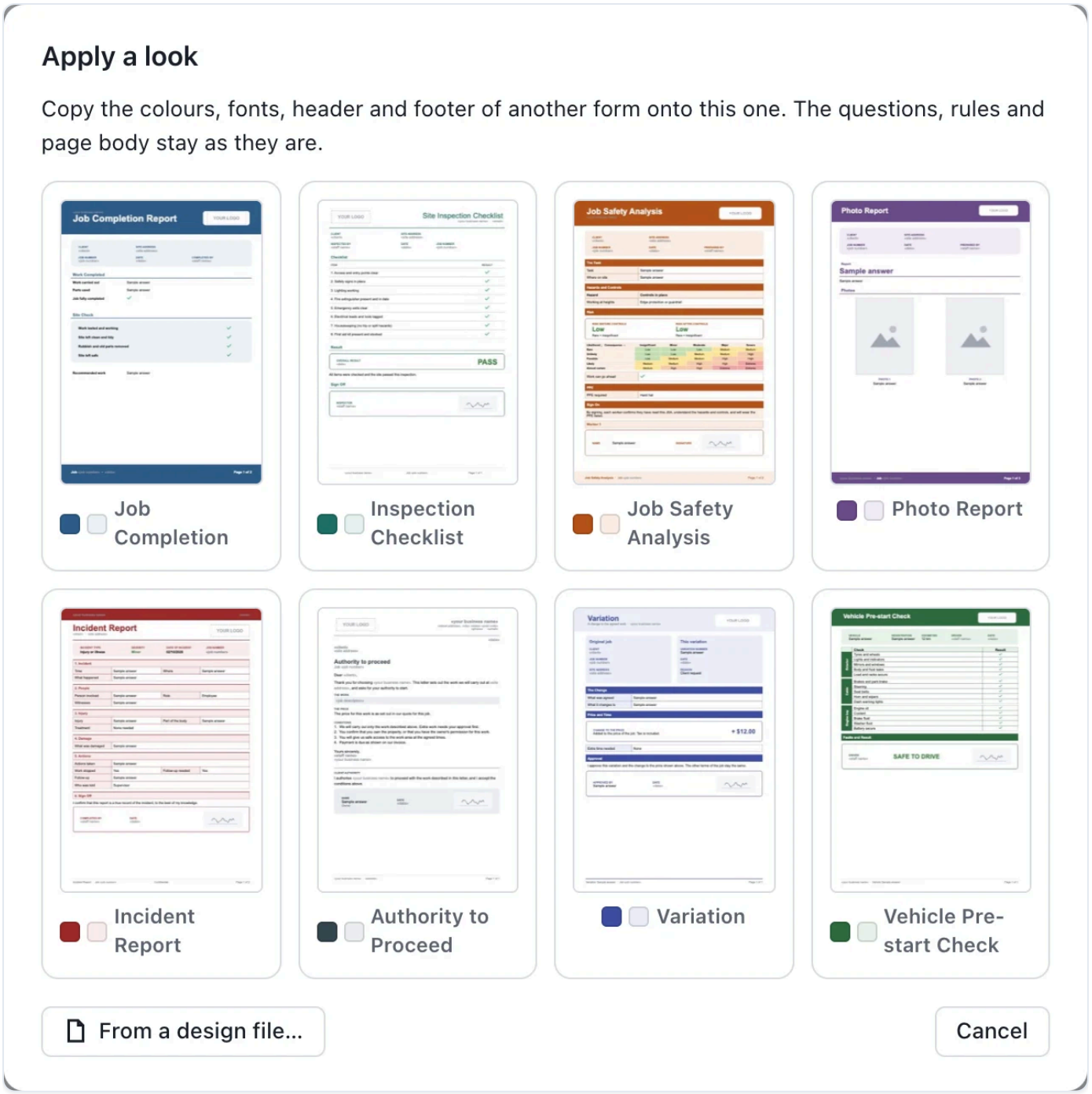
Press **Tidy**.



The page after Tidy.

6. Give it a look

Press **Apply a look...** and pick one of the eight starter looks. Form Designer asks what to copy: **Colours and table style**, **Font, text size and margins**, and **Header and footer**.



Apply a look: the eight starter looks.

The questions, the rules and the body of the page stay as they are. Use the same look on all your forms, and they all match.

7. Save, download and import it

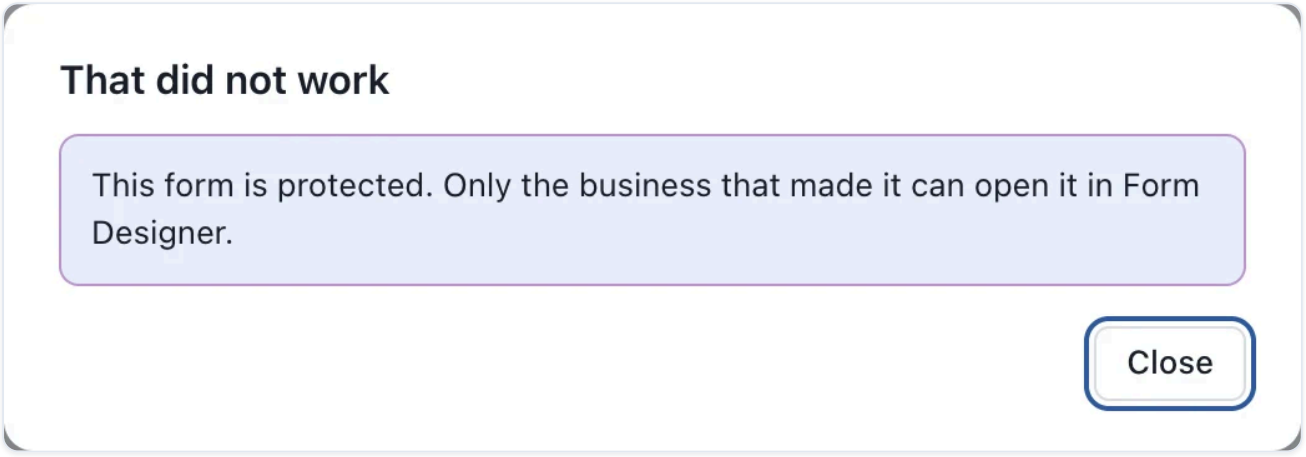
As in Build your first form, steps 10 and 11:

1. Press **Save** to keep the design in My forms.

2. Press **Download**, then **Download** in the box.
3. In ServiceM8, go to **Settings**, then **Forms**, press **Import Form** and pick the file.
4. Fill in the new form on a test job and check the PDF before you use it for real.

Forms that can't be opened

Some forms are locked so that only the business that made them can change them. Form Designer can't open those.



A locked form.

- A form locked outside Form Designer, for example a form from the ServiceM8 Form Store.
- A form that another business made in Form Designer.
- A file over 4 MB.

If a form you need won't open, ask the business that made it for a copy you can change.