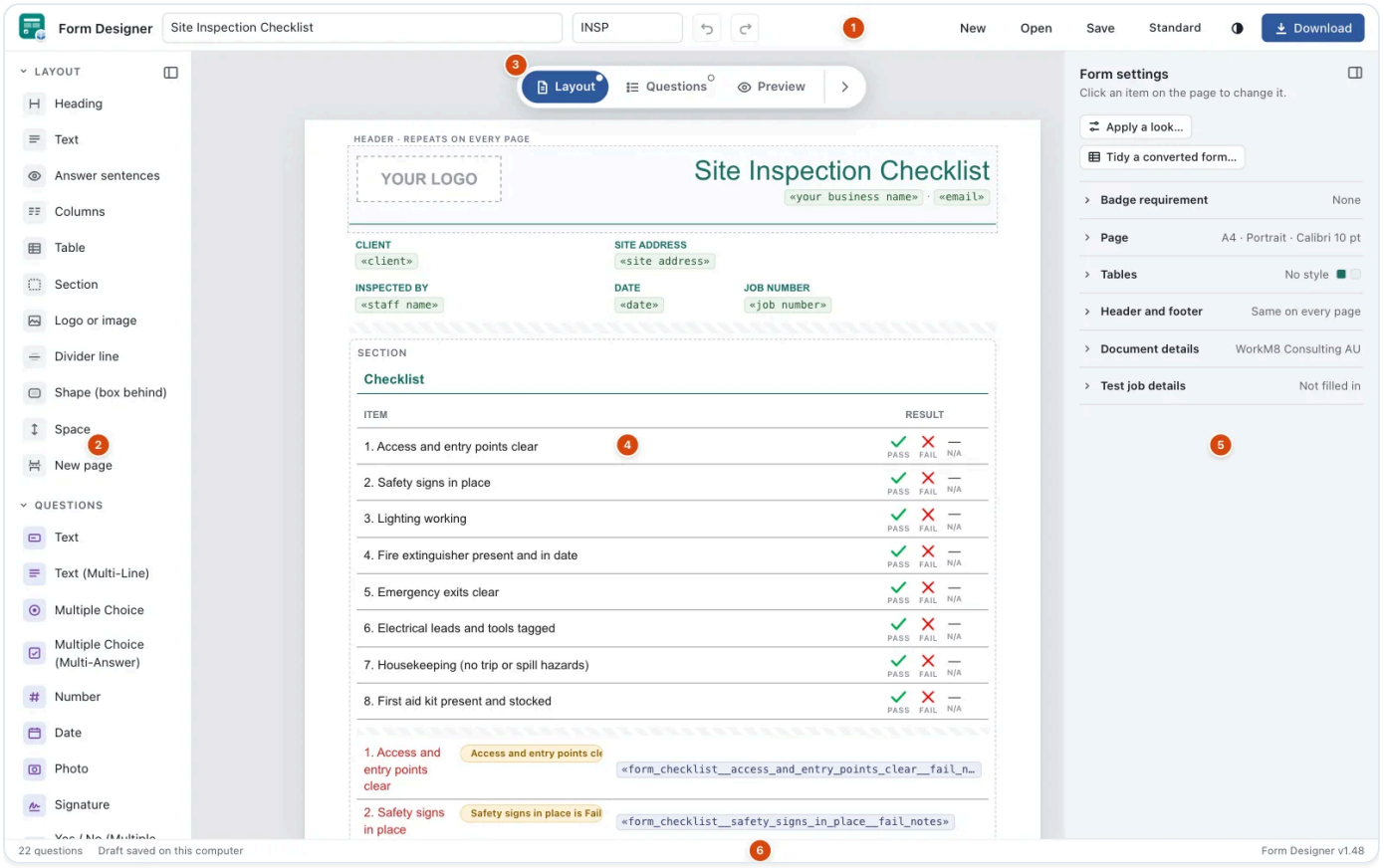
FORM DESIGNER GUIDES · 1 OF 3

Find your way around

The parts of the Form Designer window: the top bar, the view dock and its menus, the panels on each side, and the toolbar on the item you pick.

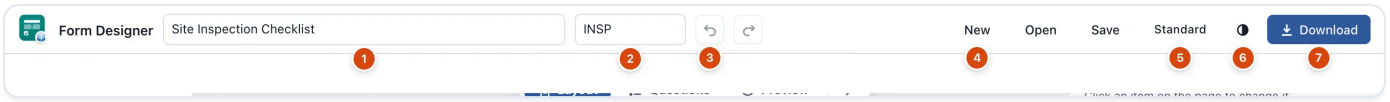
Form Designer opens from the **Add-ons** menu in ServiceM8 on the web. It fills the window, and it has six parts.



The Form Designer window: 1 top bar, 2 list of items to add, 3 view dock, 4 the page, 5 settings panel, 6 footer.

1. **The top bar**: the form's name, and the buttons to open, save and download it.
2. **The list of items** on the left: everything you can put on the page.
3. **The view dock**: three views of the same form.
4. **The page**: your form as it prints.
5. **The settings panel** on the right: the settings of the form, or of the item you pick.
6. **The footer**: the number of questions, and where the form is saved.

The top bar



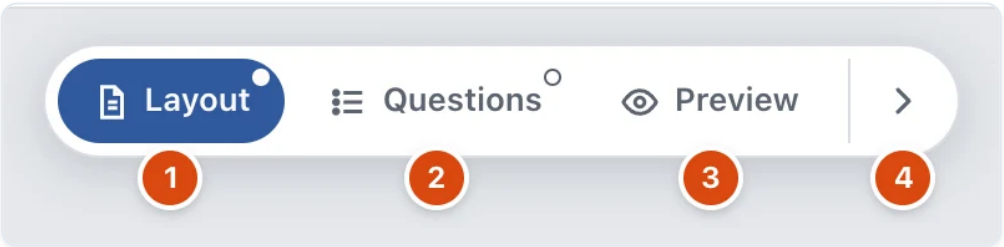
The top bar, from left to right.

1. **Form name**: the name of the form in ServiceM8.
2. **Badge**: up to 10 letters or numbers. ServiceM8 shows the badge on the job. Short badges are easier to read.
3. **Undo** and **Redo**.
4. **New** starts a form. **Open** opens a form from My forms, or a file from this computer. **Save** keeps the design in My forms, in your own ServiceM8 account.
5. **Your plan**, for example **Standard**.
6. **Light or dark**.
7. **Download** makes the form file (.sm8f) to import into ServiceM8.

The Form Designer icon on the far left shows the version and your plan.

The view dock

The dock is the pill that floats over the page. It switches between three views of the same form. Nothing is lost when you switch.



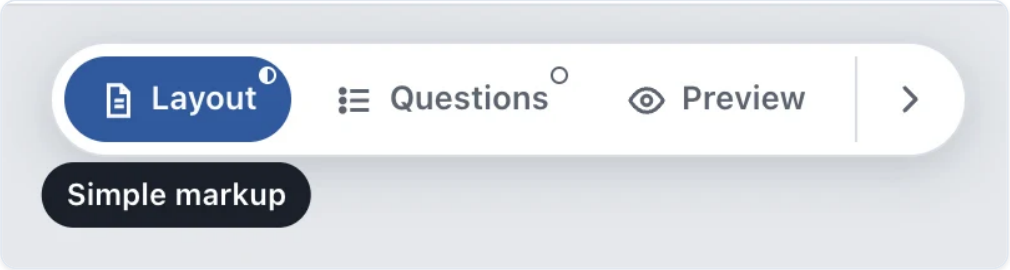
The view dock.

1. **Layout**: arrange what prints on the page.
2. **Questions**: every question, in the order the technician answers it.

3. **Preview**: the finished form, filled in with sample answers.
4. **More options**: more controls for the view you are in.

Click the view you are in

Click **Layout** or **Questions** again to show more or less on the screen. A short note says which level you are on.

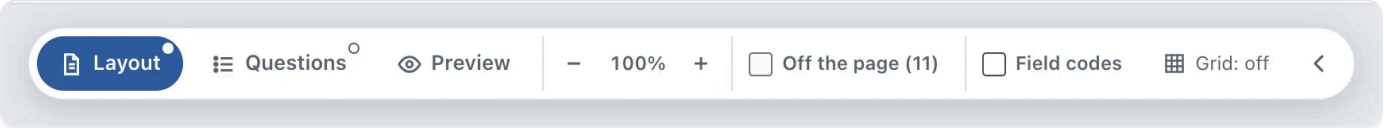


A second click on Layout: the note says Simple markup.

- **Layout** steps through **All markup**, **Simple markup** and **No markup**. Markup is what Form Designer draws over the page to help you, such as frames and labels. **No markup** is the closest to the printed page.
- **Questions** steps through **Names only**, **All details** and **Names and rules**.

More options

Click the arrow at the end of the dock. What you see depends on the view.

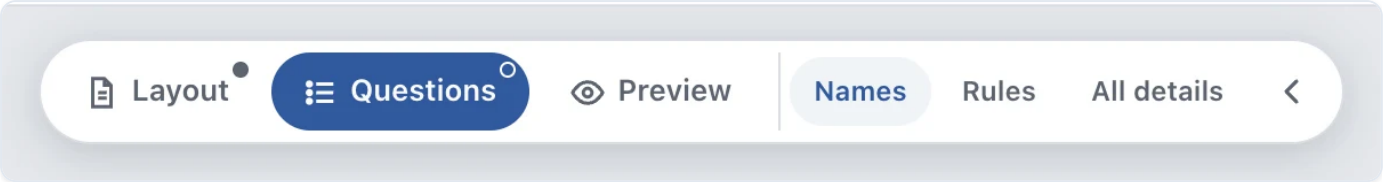


More options in Layout.

In **Layout**:

- **–**, **100%** and **+** zoom the page. Click the percentage to go back to 100%.
- **Off the page** shows the question items that do not print, such as hidden questions. The number says how many.
- **Field codes** shows every field as its Word field code.

- **Grid** steps through a 5 mm grid, the margins, both, and off. Use it to line things up.



More options in Questions.

In **Questions**: **Names**, **Rules** and **All details** set how much each question shows. In **Preview**: zoom only.

Click the arrow again to close the options.

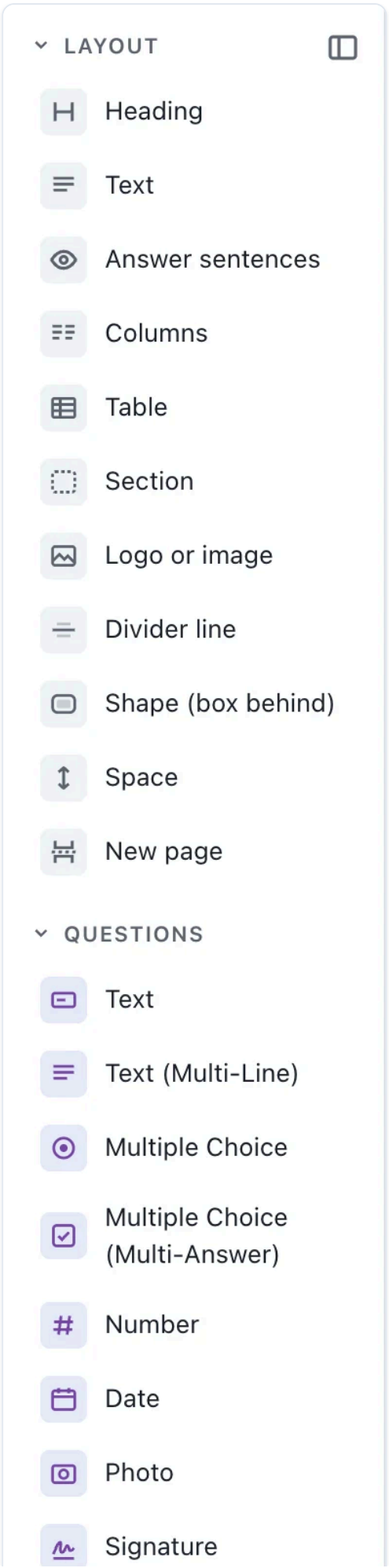
Move the dock

Drag the dock to any edge of the window: top, bottom, left or right. At the left or right it shows icons only. It stays where you put it.

The dock on the left edge: icons only.

To zoom without the dock: hold **Ctrl** (Windows) or **Cmd** (Mac) and press **+**, **–** or **0**. Ctrl and the mouse wheel, or a pinch on a trackpad, also work. Zoom works in Layout and Preview.

The list of items


LAYOUT
Heading
Text
Answer sentences
Columns
Table
Section
Logo or image
Divider line
Shape (box behind)
Space
New page
QUESTIONS
Text
Text (Multi-Line)
Multiple Choice
Multiple Choice (Multi-Answer)
Number
Date
Photo
Signature

The list of items in Layout.

In **Layout** the list has three groups:

- **Layout**: Heading, Text, Answer sentences, Columns, Table, Section, Logo or image, Divider line, Shape (box behind), Space and New page.
- **Questions**: the eight ServiceM8 question types, plus three shortcuts: **Yes / No**, **Photo gallery** and **Proceed step**.
- **ServiceM8**: details that ServiceM8 fills in from the job, such as the client, the job address, the staff member and your business.

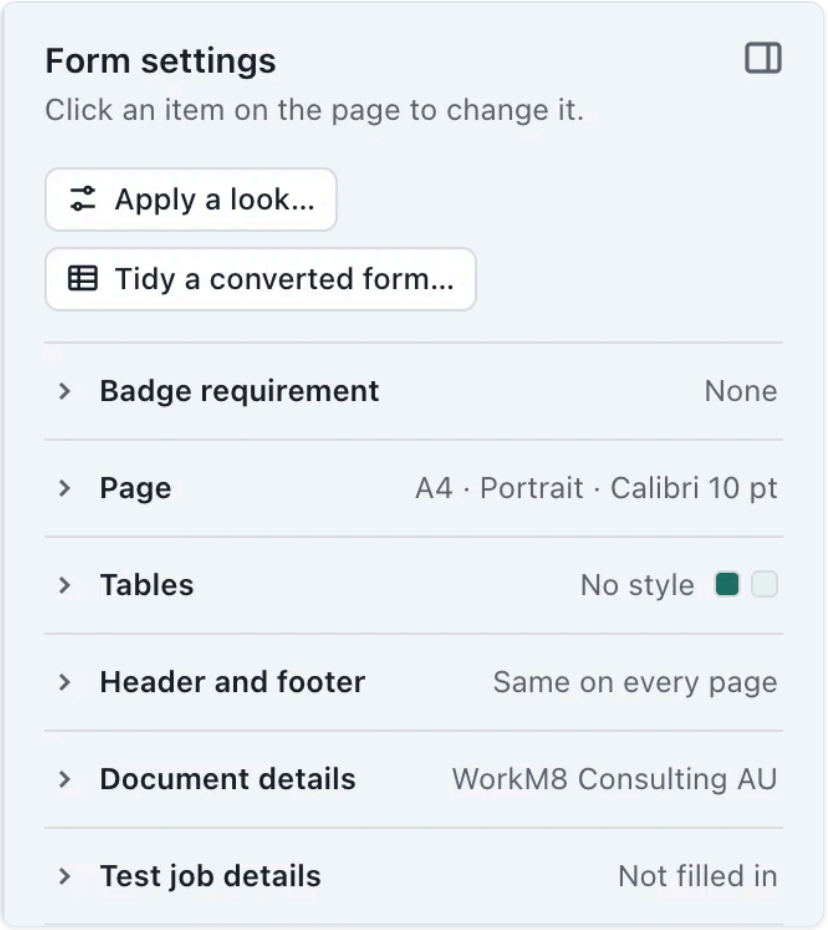
Click an item to add it after the item you picked, or at the end of the page. **Drag** an item to put it exactly where you want it. Click a group's name to fold it away.

In **Questions** the list shows the question types only. In **Preview** it turns into the sample answers (see Preview, below).

The button at the top right of the list hides it, so you get more room for the page.

The settings panel

When nothing is picked, the panel shows **Form settings**: the settings of the whole form.



Form settings, with nothing picked on the page.

- **Apply a look...** copies the colours, fonts, header and footer of another form onto this one.
- **Tidy a converted form...** cleans up the page of a form opened from ServiceM8.
- **Badge requirement**: none, or the form must be completed on Check-In or Check-Out.
- **Page**: page size, orientation, margins, font and text size.
- **Tables**: the style of every table, and the form's two colours.
- **Header and footer**: what repeats on every page, and colour bands.
- **Document details**: the author and company stored in the file.
- **Test job details**: sample job values for the Preview. They never go into the form.

Click a heading to open it. The grey words on the right show its setting now.

Click an item on the page and the panel shows the settings of that item, for example **Question** or **Table**. Click an empty part of the page, or press **Esc**, to go back to Form settings.

Drag the left edge of the panel to make it wider. Double-click the edge to reset it. The button at the top right hides the panel.

The item you pick

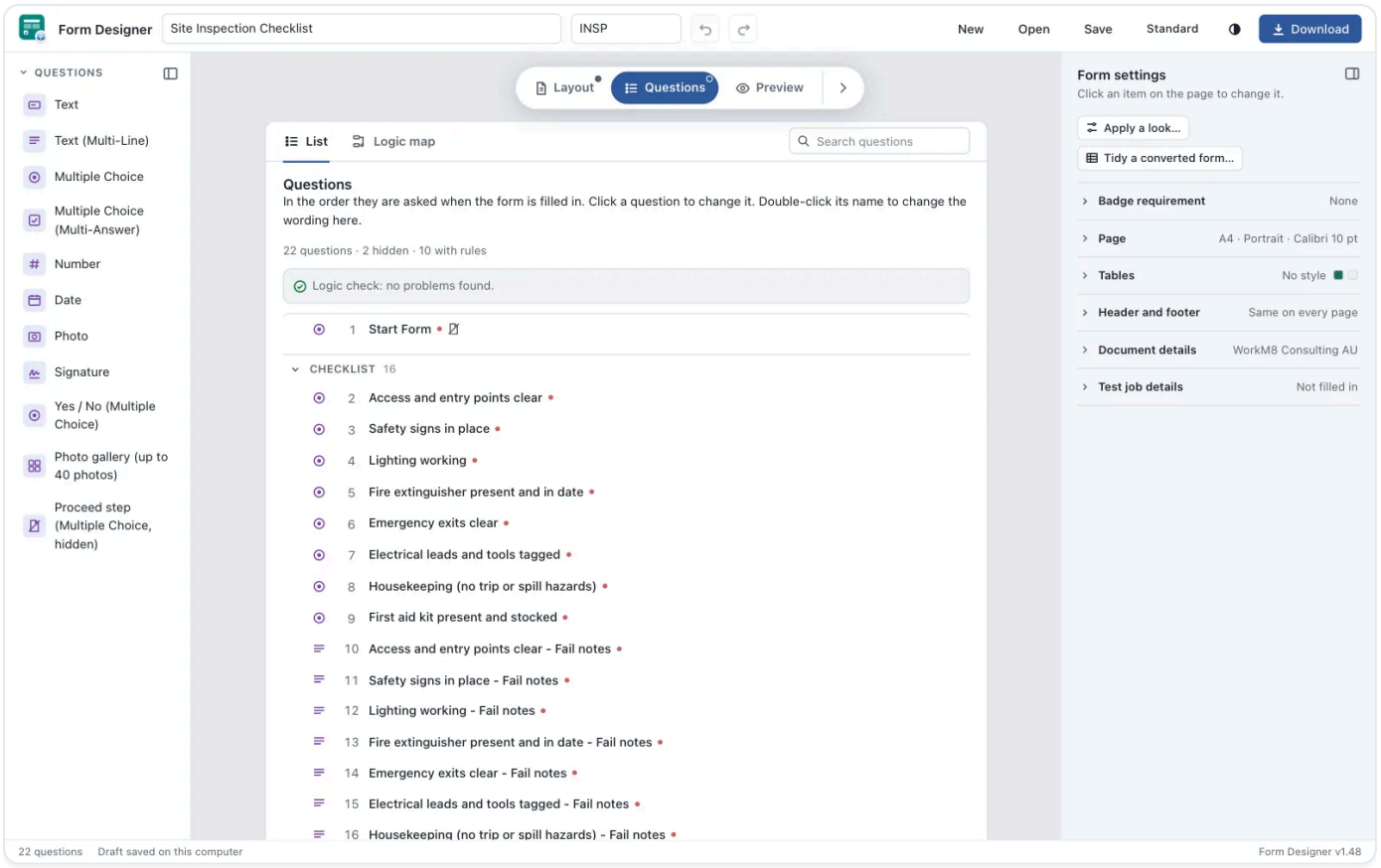
Click an item on the page to pick it. A small toolbar shows on its top edge.

A picked question and its toolbar.

From left to right: quick changes for that kind of item, then **Drag to move**, **Move up**, **Move down**, **Duplicate** and **Delete**. For a question, the quick changes put the label beside or above the answer, and hide the question from the printed page.

Double-click any text on the page to type in it. The **Delete** key removes the picked item straight away; **Undo** brings it back.

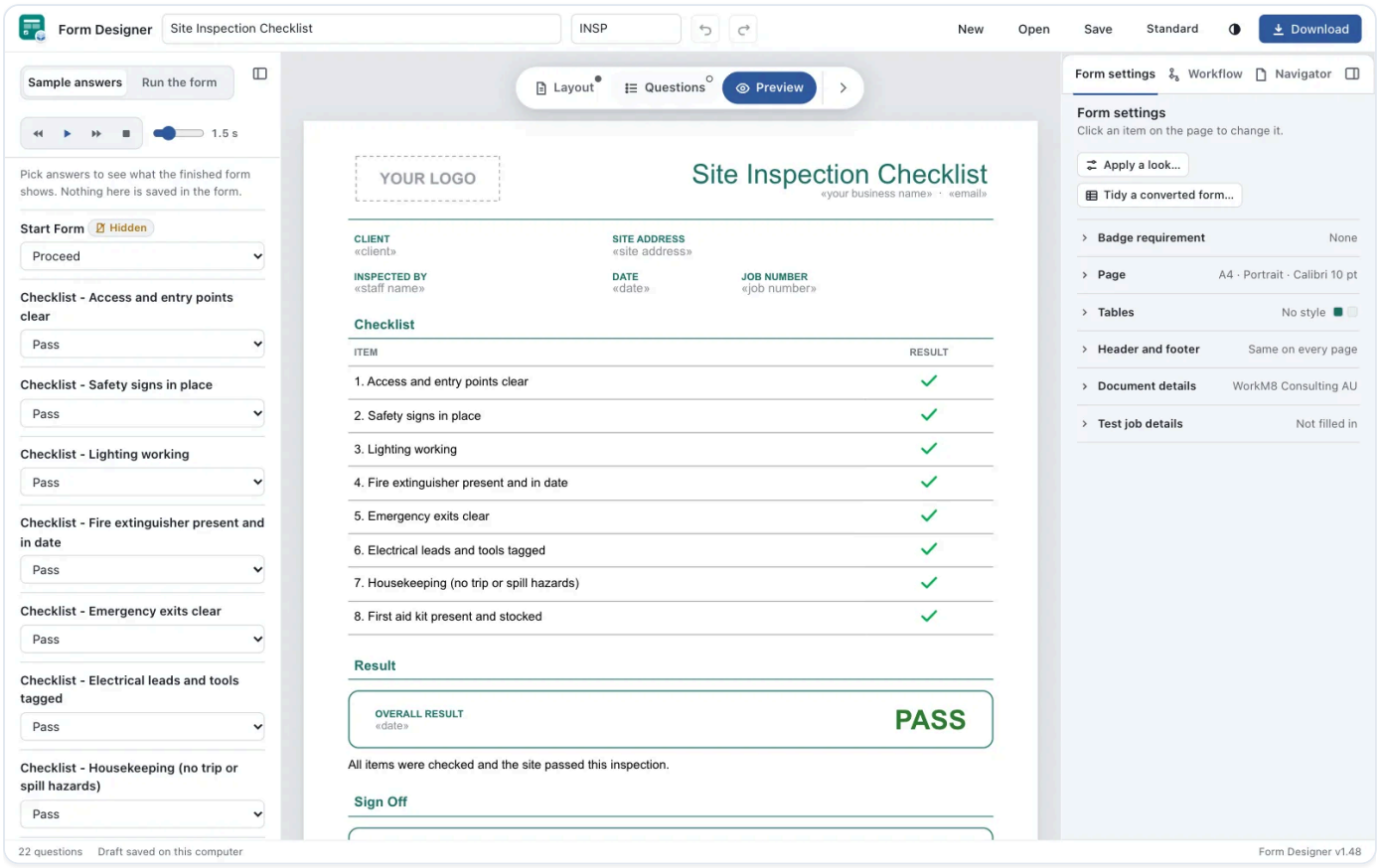
The Questions view



The Questions view: every question in order.

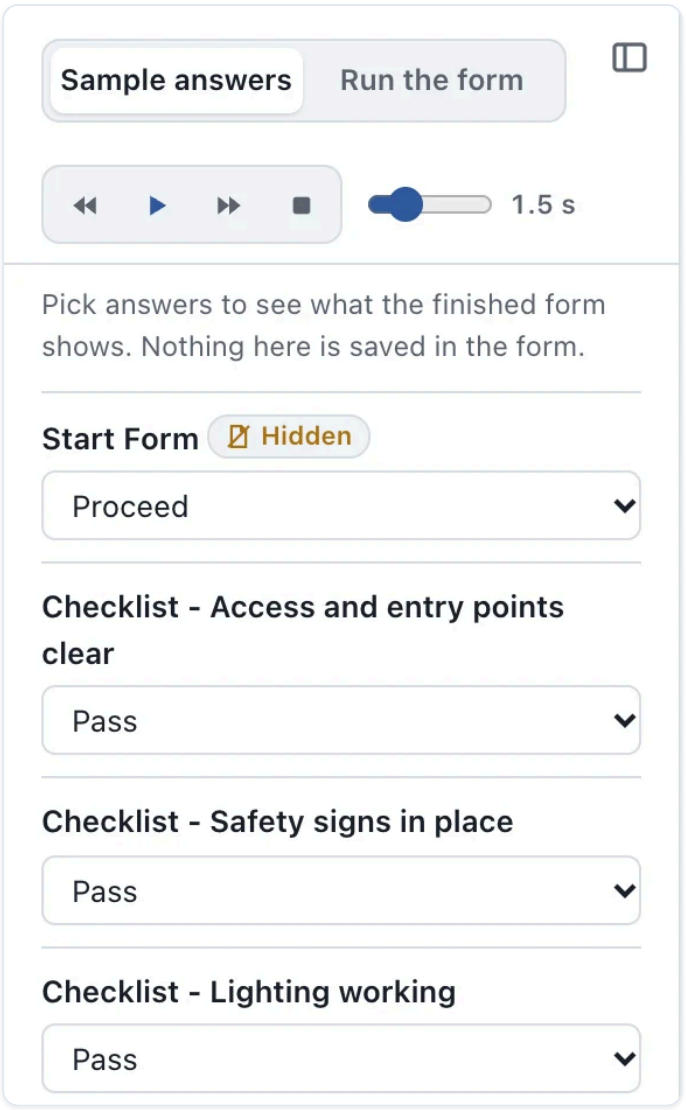
- **List** shows every question in the order it is asked. **Logic map** draws a line from each question to the questions it decides.
- The line under the title counts the questions, the hidden ones and the ones with rules.
- The **Logic check** line finds rules that break, never match or do nothing. Click it to see the list.
- Click a question to change it. Double-click its name to change the wording.

Preview



Preview: sample answers on the left, the finished form in the middle.

The page in the middle is built from the real Word template, filled in with the answers on the left.

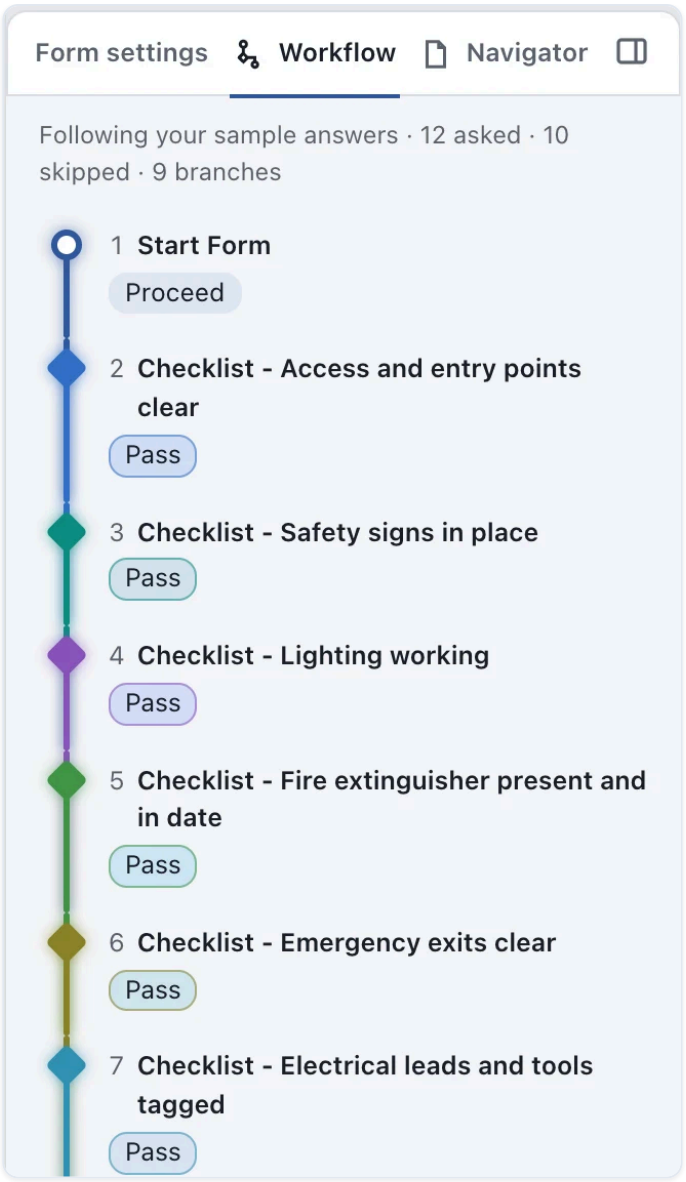


Sample answers, with the play buttons.

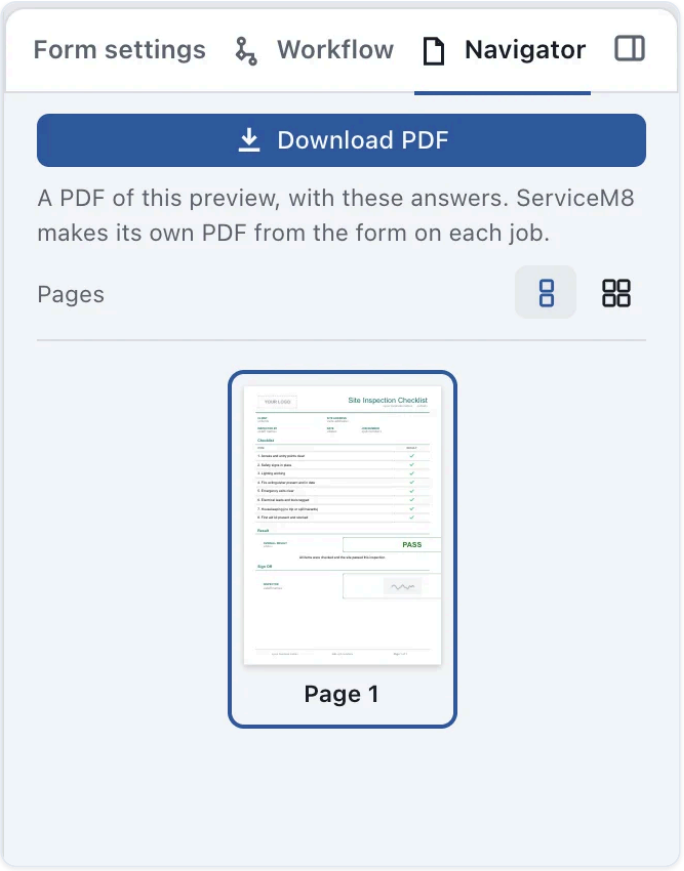
- **Sample answers**: pick answers and watch the page change. Nothing here is saved in the form.
- **Run the form**: answer one question at a time, as the technician will. Questions that your rules skip are skipped here too.
- The **play** buttons answer each question for you, one after another. The slider sets the pause.

The tabs on the right:

- **Workflow** shows the path through the form with these answers: what was asked and what was skipped.
- **Navigator** shows every page, and has **Download PDF**: a PDF of this preview with these answers.



Workflow: the path through the form.



Navigator: every page, and Download PDF.

ServiceM8 makes its own PDF from the form on each job. The Preview is very close, but a line can wrap a little differently. Always try a new form on a real job.

The footer

The footer shows the number of questions, then **Draft saved on this computer** and the last time the form was saved to My forms. The draft on this computer is a safety net only: use **Save** to keep a form.

Keyboard shortcuts

KEYS	WHAT THEY DO
Ctrl or Cmd + Z	Undo
Ctrl or Cmd + Shift + Z, or Ctrl + Y	Redo
Delete or Backspace	Delete the picked item
Esc	Close a box, or stop picking an item
Ctrl or Cmd with + – 0	Zoom in, zoom out, back to 100%
Alt + F9	Show or hide the field codes (Layout)
Double-click	Type in text on the page
Ctrl or Cmd + B, I, U	Bold, italic, underline while you type