FORM DESIGNER GUIDES · 2 OF 3

Build your first form

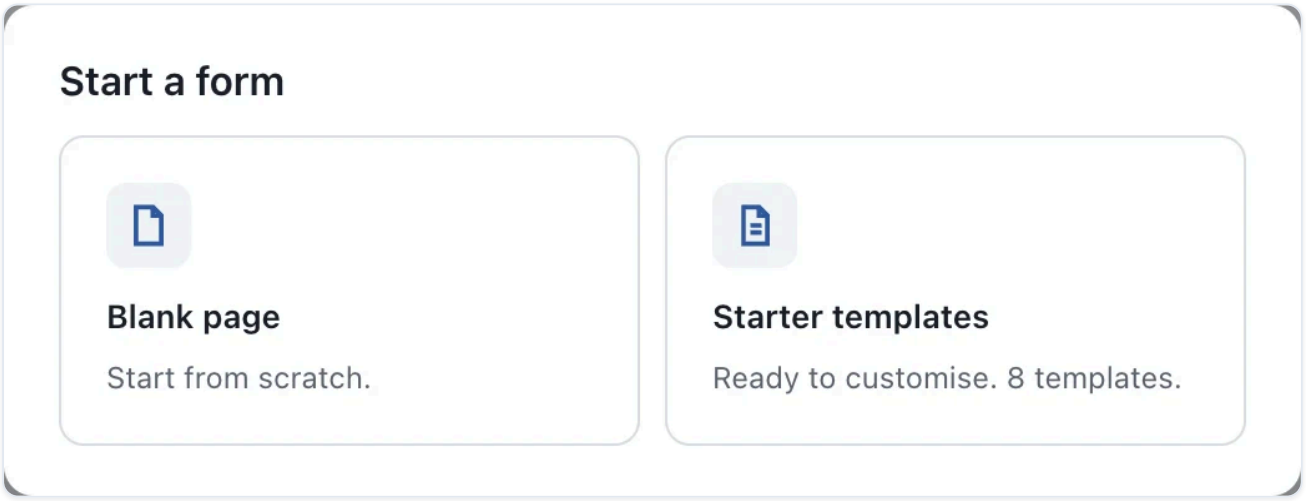
Build a short Site Visit Report from a blank page: job details, a section, six questions with two rules, a test run, then save, download and import it into ServiceM8.

This guide builds a short **Site Visit Report** from a blank page. It takes about 15 minutes. Each step uses a part of the window from Find your way around.

Want a head start? Press **New**, then **Starter templates**, and pick one of the eight ready-made forms. Each one is complete, and you can change any part of it.

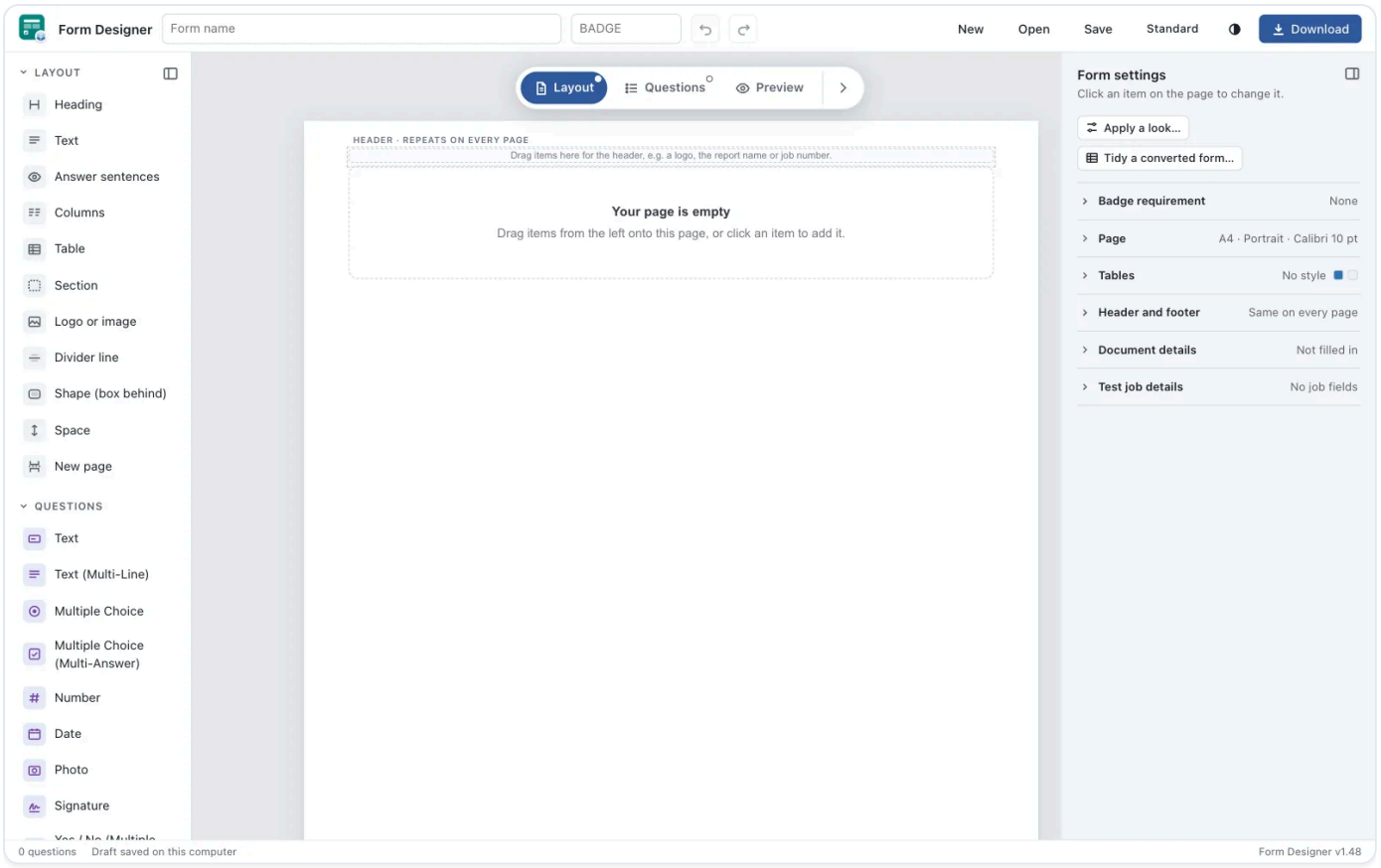
1. Start a blank page

Press **New** in the top bar. Form Designer asks how to start.



Start a form.

Pick **Blank page**. The page says **Your page is empty**.



A blank page, ready for items.

2. Name the form

In the top bar, type the **Form name**: `Site Visit Report`. Then type a short **Badge**: `SVR`.

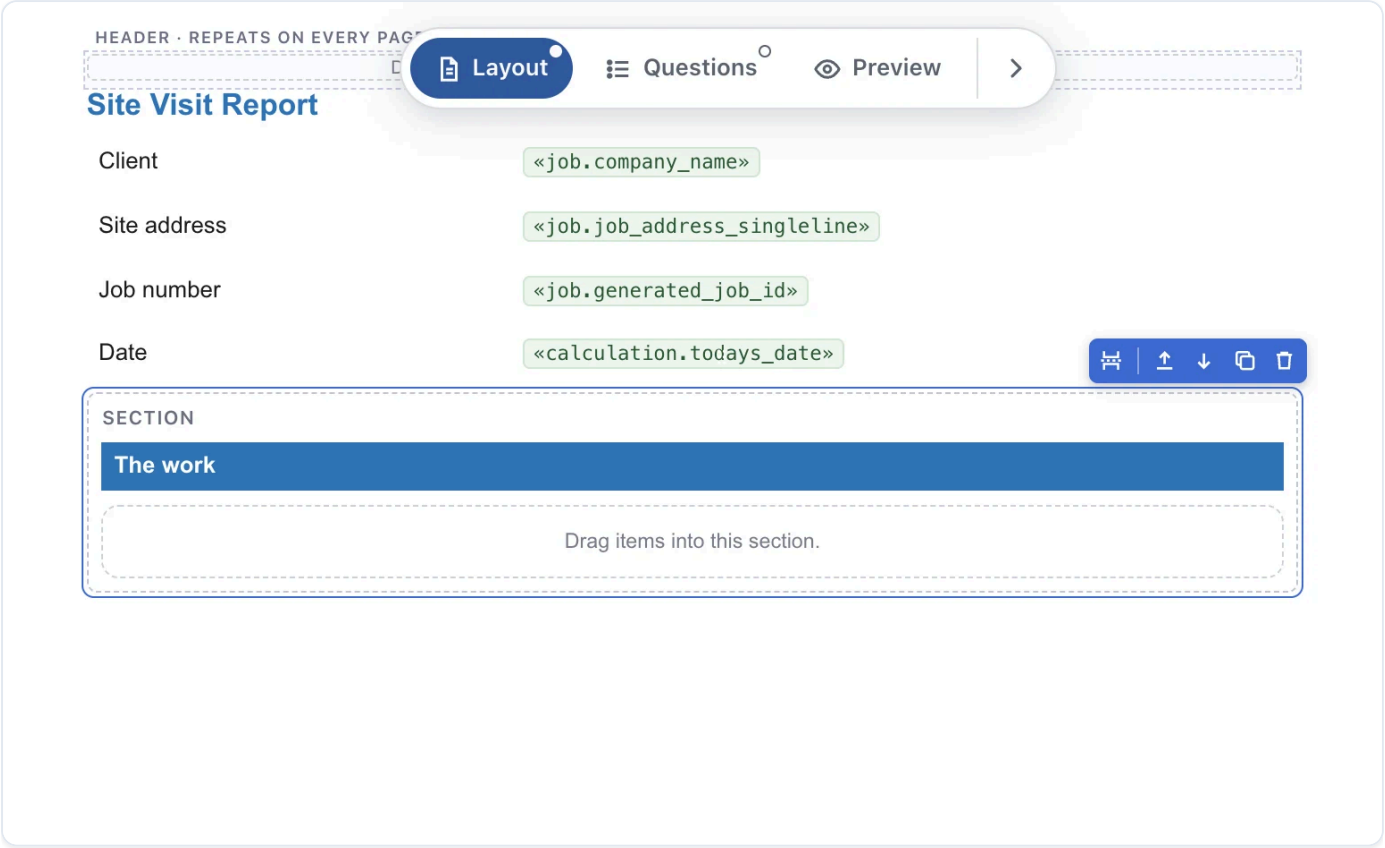
3. Add a heading and the job details

1. In the list on the left, click **Heading** (in the Layout group). On the right, type `Site Visit Report` in **Text**.
2. Open the **ServiceM8** group and click these details, one after another: **Client name** (under Client), **Job address (one line)** and **Job number** (under Jobs), and **Today's date** (under Job dates).
3. Each detail shows a label and a field in «» marks. On the right, change the **Label** to a short word, for example `Client`.

ServiceM8 fills these in from the job. Nobody has to type them.

4. Add a section

Click **Section** in the Layout group. On the right, type `The work` in **Title**. The title prints as a coloured bar.

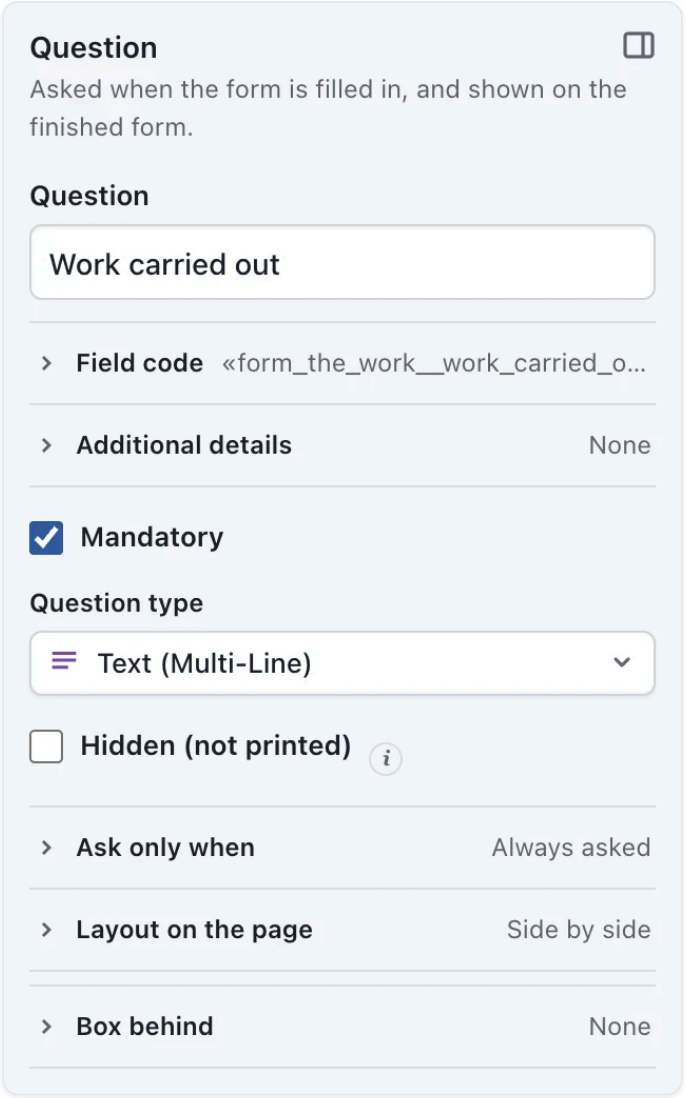


The heading, four job details and the section.

A section holds items together. While the section is picked, the questions you click go inside it. Their names then start with the section's name, for example **The work - Work carried out**.

5. Add your questions

Click the section to pick it. Then, in the **Questions** group, click **Text (Multi-Line)**. On the right, type the question: `Work carried out`. Tick **Mandatory**, so it must be answered.



The settings of a question.

The parts of a question:

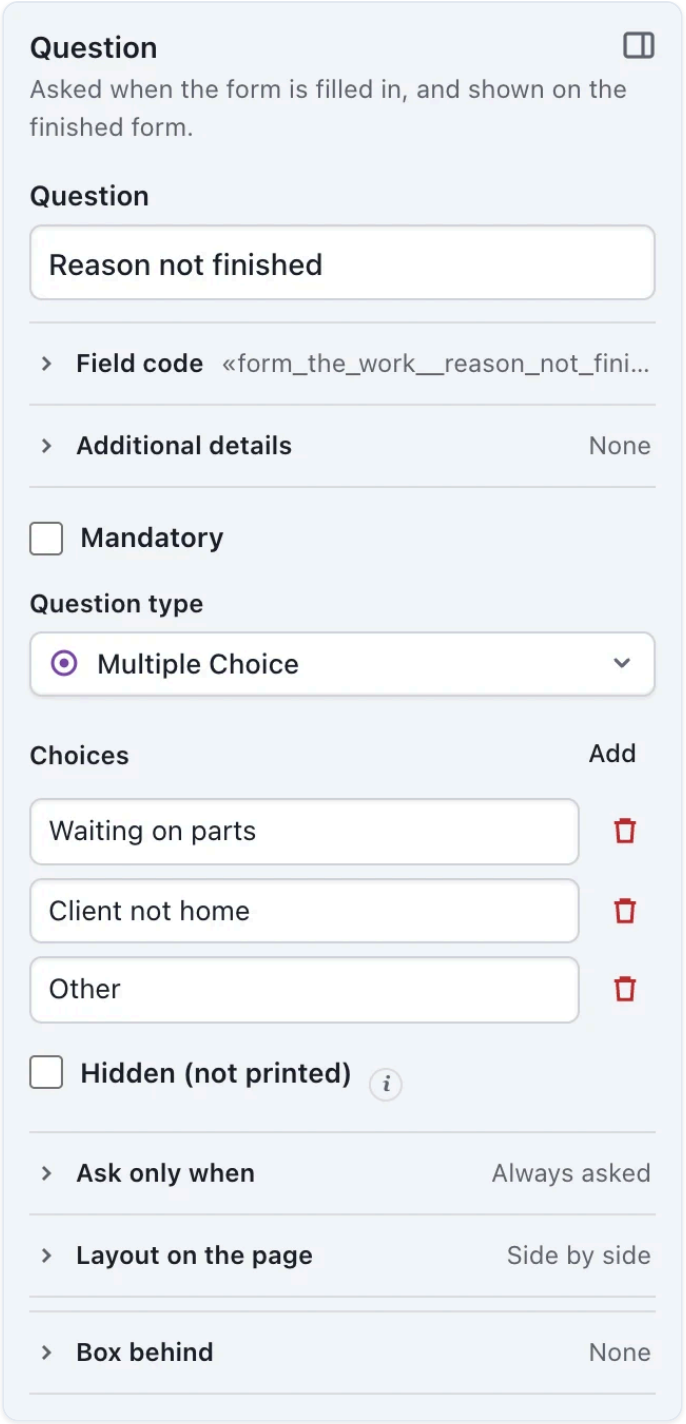
- **Question**: what the technician is asked. The same words print on the PDF.
- **Field code**: where ServiceM8 puts the answer. Form Designer makes it for you.
- **Additional details**: a line shown under the question while the form is filled in.
- **Mandatory**: the question must be answered.
- **Question type**: change the type at any time.
- **Hidden (not printed)**: asked, but left off the PDF.
- **Ask only when**: the rules for this question (step 6).
- **Layout on the page**: the label beside the answer, above it, or no label.

The question on the page has a toolbar on its top edge, to move, duplicate or delete it.

The question on the page, with its toolbar.

Now pick the section again and add two more questions:

1. **Yes / No (Multiple Choice)**: `Job fully completed`. Its answers are already **YES** and **NO**.
2. **Multiple Choice**: `Reason not finished`. Under **Choices**, change **Option 1** to `Waiting on parts` and **Option 2** to `Client not home`. Press **Add** and type `Other`.



A Multiple Choice question and its three answers.

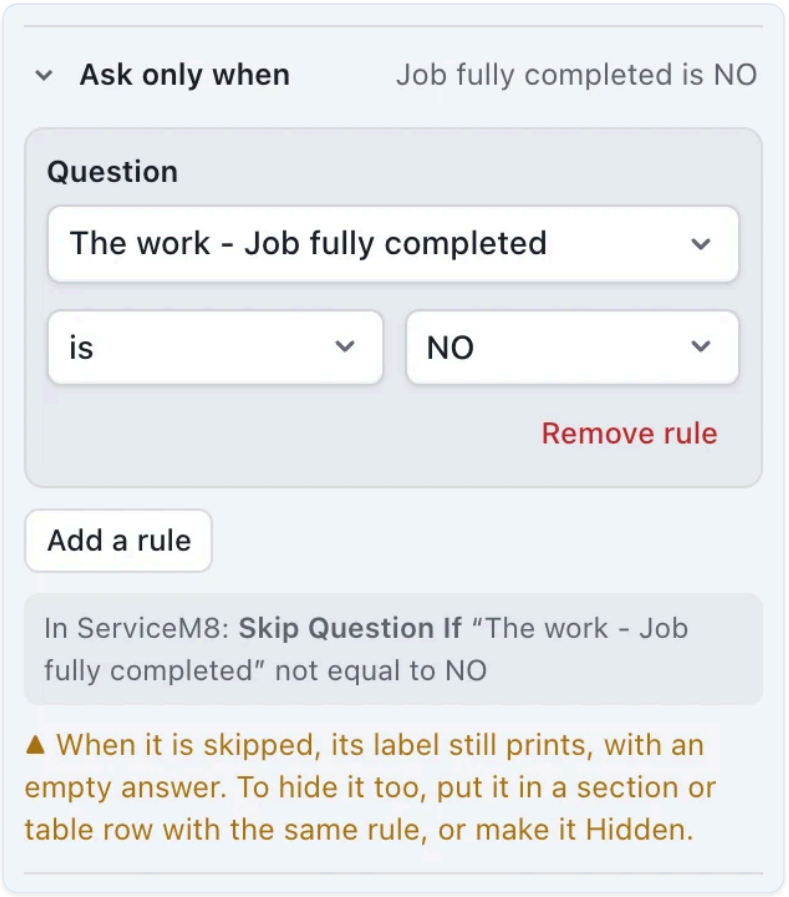
A choice question holds up to 10 answers. That is the most ServiceM8 takes.

6. Ask a question only when it applies

Reason not finished only makes sense when the job is not finished. Give it a rule.

1. Pick **Reason not finished**. On the right, open **Ask only when**.

2. Press **Add a rule**.
3. Set **Question** to **The work - Job fully completed**, then **is**, then **NO**.



The rule: Job fully completed is NO.

The grey line shows how ServiceM8 stores the rule: **Skip Question If**. You don't need to think about it: write the rule as "show this when".

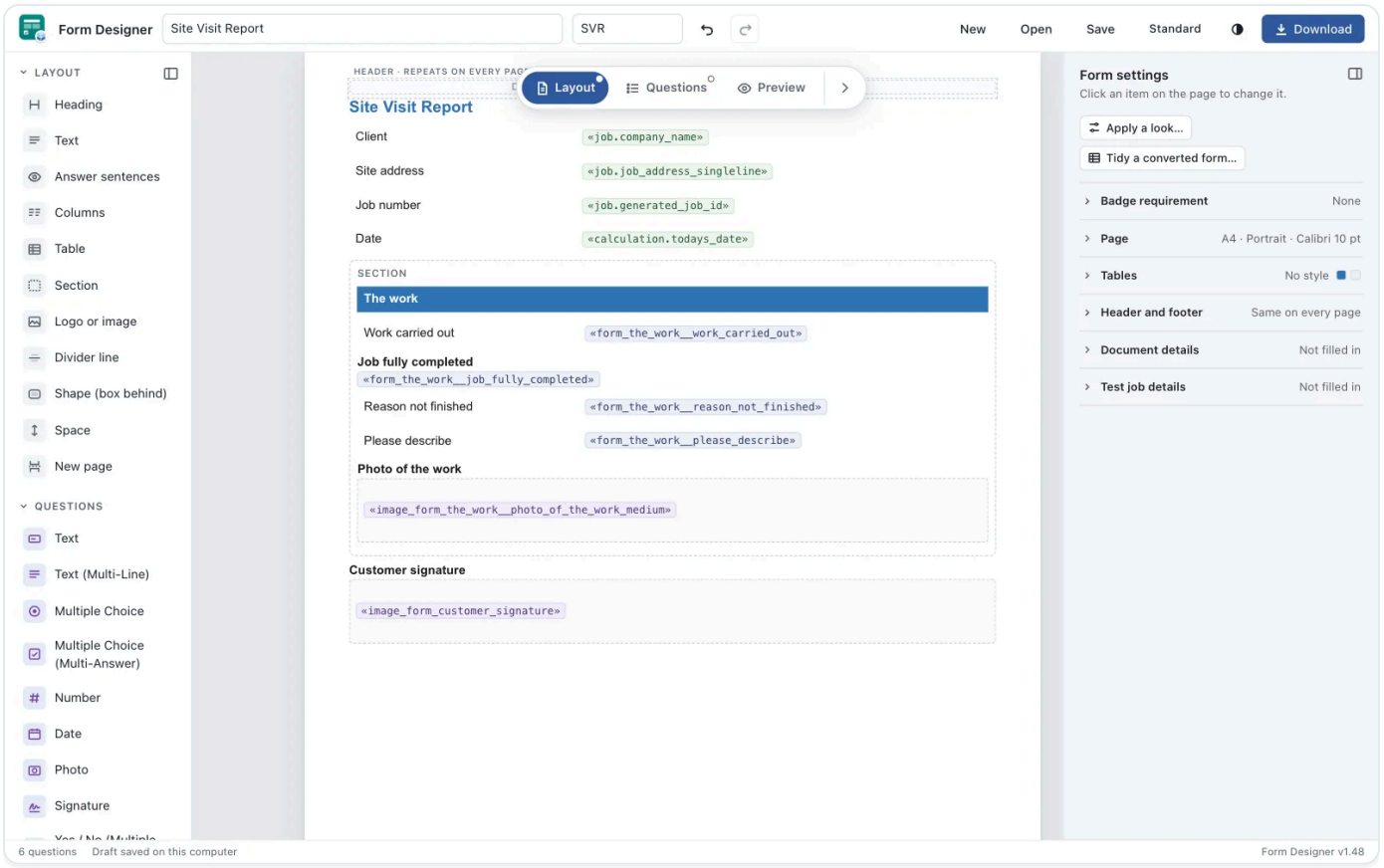
Add one more question in the section, **Text**: `Please describe`, with the rule **Reason not finished is Other**.

Good to know:

- A rule can only use a question **above** it.
- A question holds up to 3 rules. With two or more, choose **All rules are true** or **Any rule is true**.
- A section, and a row of a table, can have rules too. Then everything inside follows the rule.

7. Add a photo and a signature

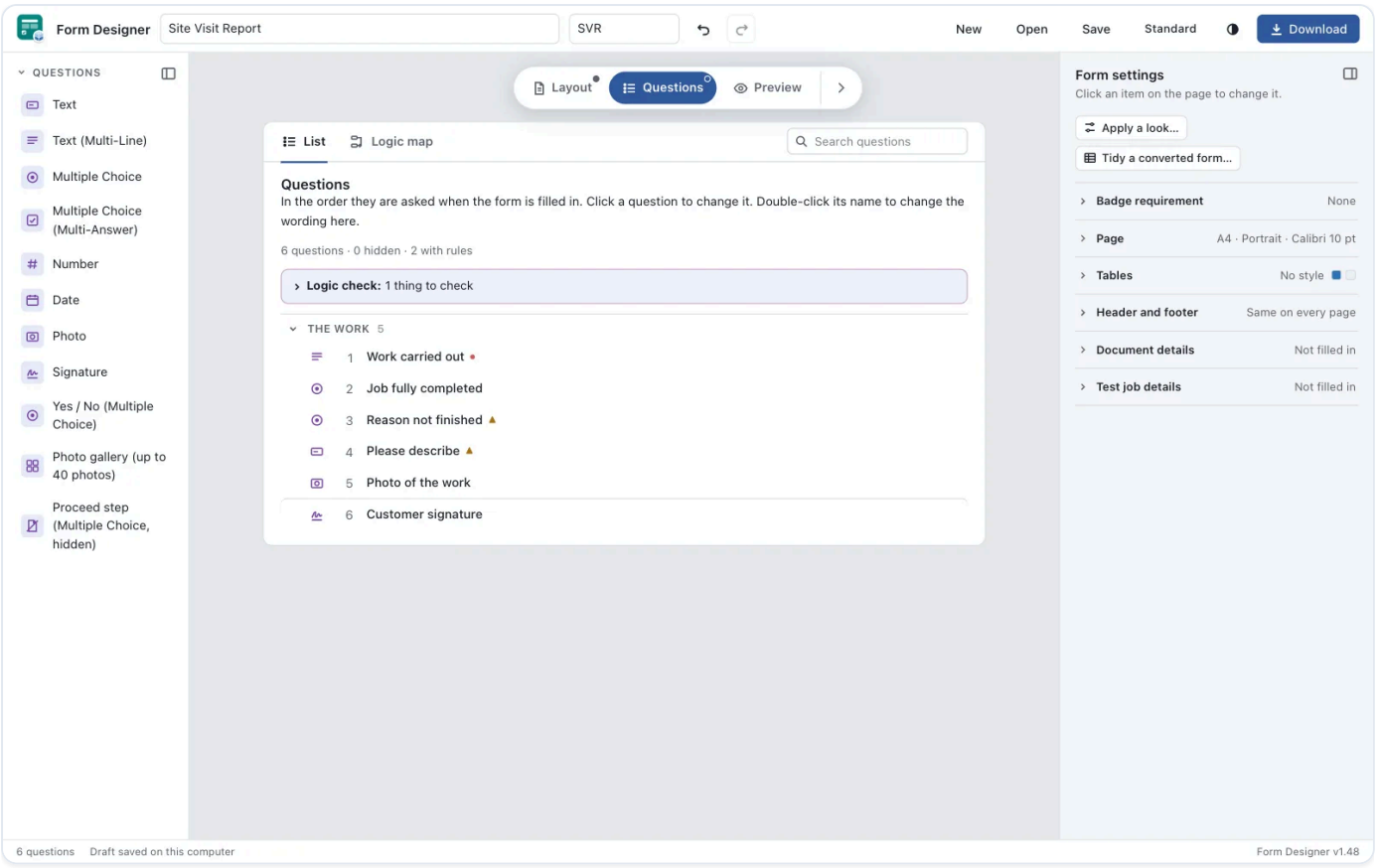
Pick the section and add **Photo**: `Photo of the work`. Then press **Esc**, so nothing is picked, and add **Signature**: `Customer signature`. It goes at the end of the page, outside the section.



The whole form in Layout.

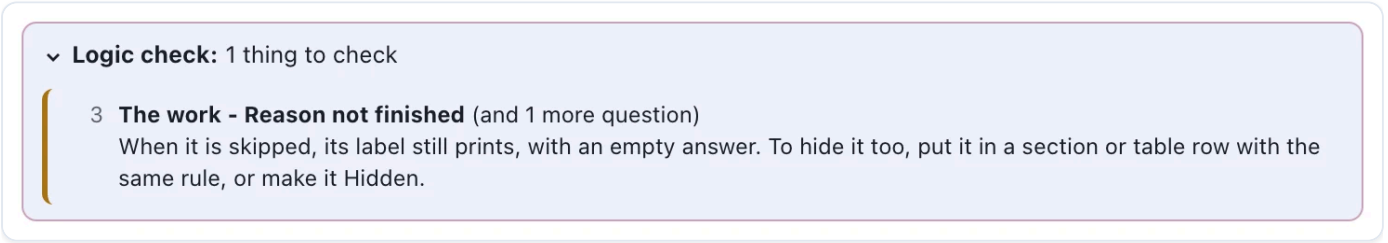
8. Check the logic

Click **Questions** in the dock. Every question shows in the order it is asked.



The Questions view of the new form.

The **Logic check** line looks at every rule. Click it to see what it found.



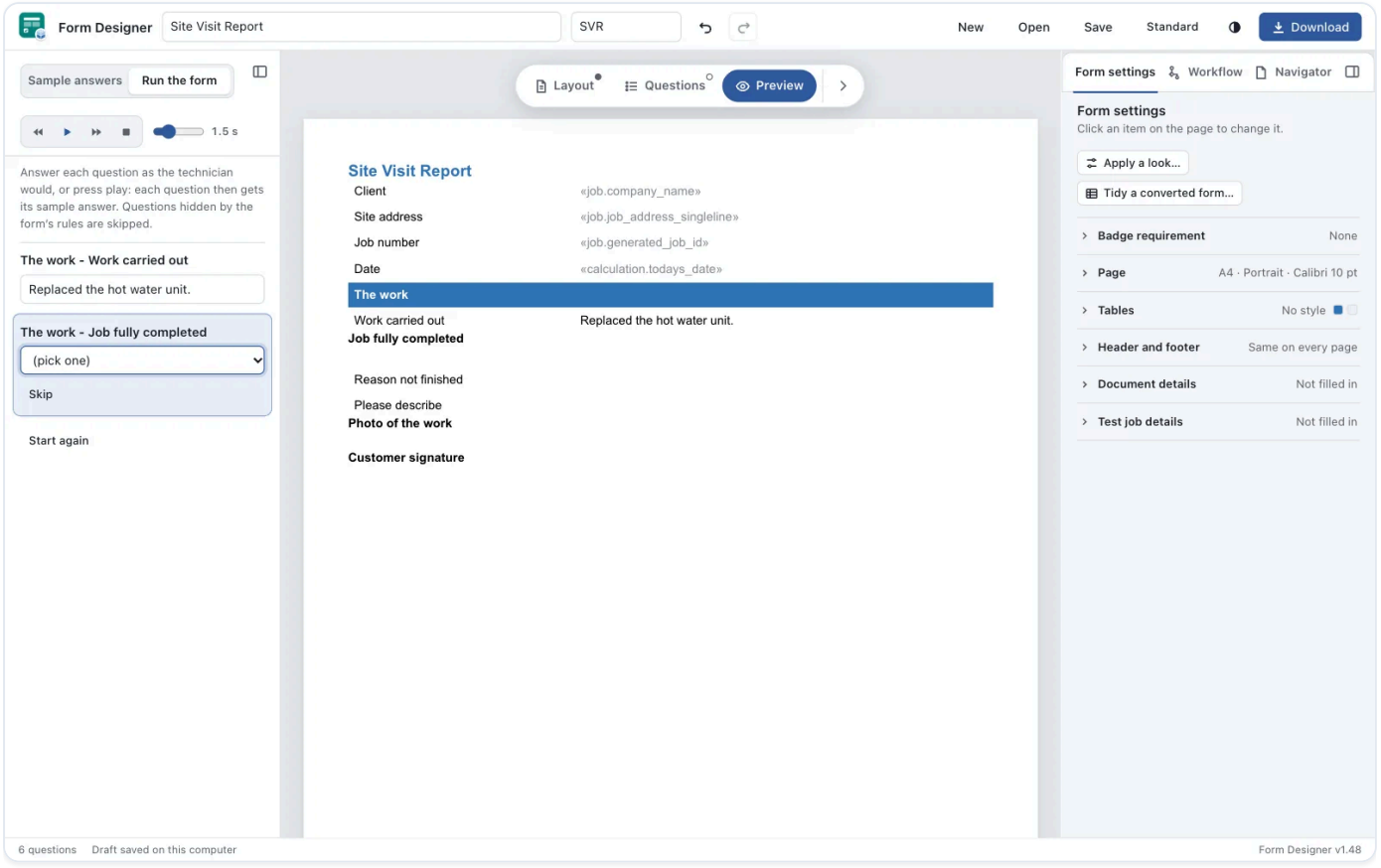
One thing to check.

Here it says that **Reason not finished** still prints its label when it is skipped. That is fine for this form. To hide the label too, put the question in a section or a table row with the same rule, or make it **Hidden (not printed)**.

9. Try it, as the technician

Click **Preview** in the dock, then **Run the form** on the left. Answer each question as the technician would. Answer **YES** to **Job fully completed**, and **Reason not finished** is

skipped.

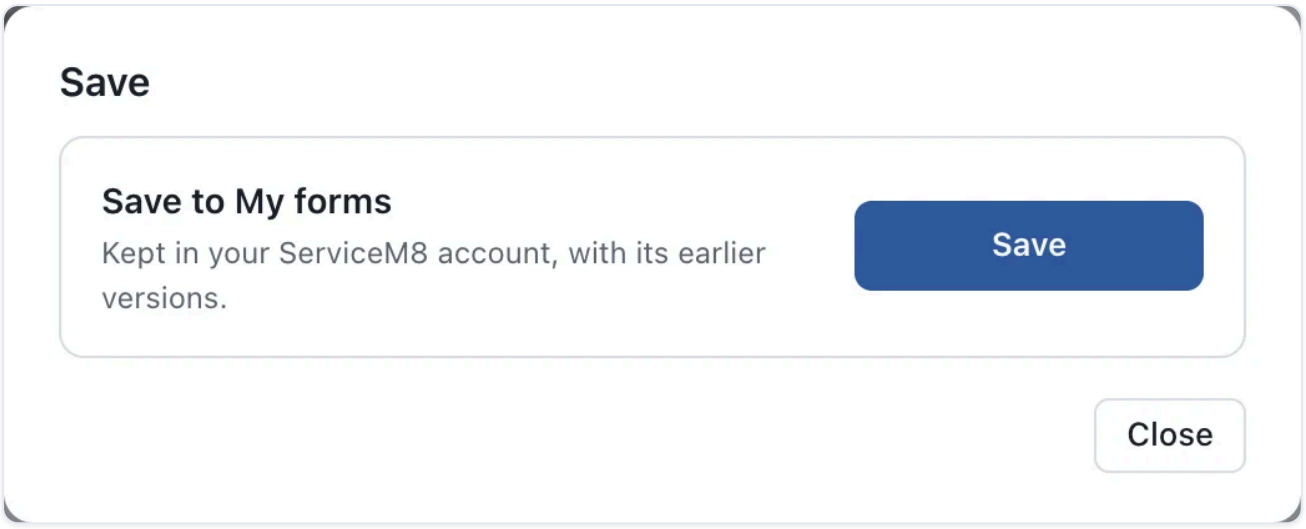


Run the form, part-way.

The page in the middle fills in as you go. The **Workflow** tab on the right shows the path: what was asked and what was skipped.

10. Save it

Press **Save** in the top bar, then **Save** in the box.

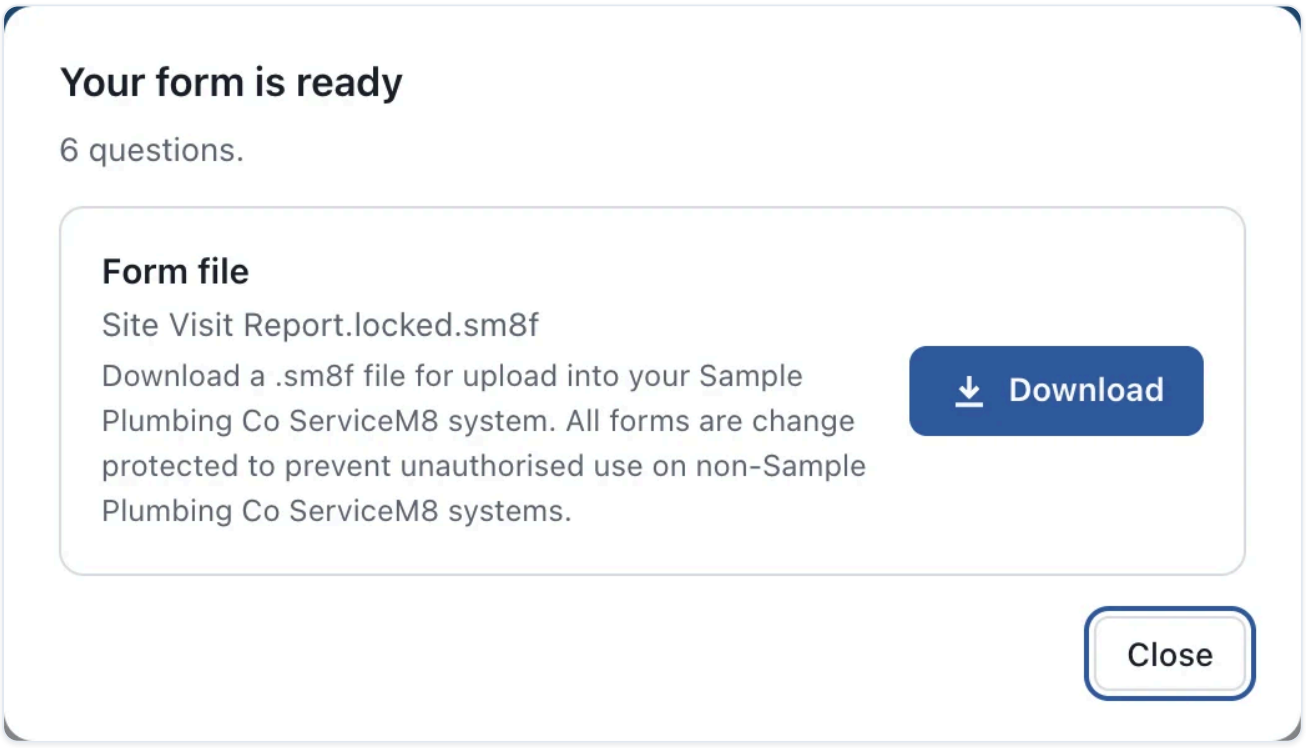


Save to My forms.

The design is kept in **My forms**, in your own ServiceM8 account, with its earlier versions. Open it again any time with **Open**.

11. Download it and import it into ServiceM8

Press **Download** in the top bar. Form Designer builds the form file.

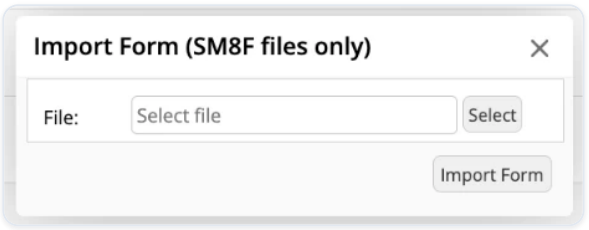


Your form is ready.

Press **Download** to save the file on your computer. Then import it into ServiceM8:

1. In ServiceM8, go to **Settings**, then **Forms**.
2. Press **Import Form**.
3. Press **Select**, pick the file, then press **Import Form**.

The Forms page in ServiceM8 settings, with the Import Form button.



The Import Form box in ServiceM8.

The file name ends in **.locked.sm8f**. On the Standard plan every form is protected: it can't be changed or exported inside ServiceM8, and it prints only in your own ServiceM8 account. To change it, open it in Form Designer, change it, download it and import it again.

Before you use it for real, fill in the form on a test job and look at the PDF. ServiceM8 makes its own PDF, and a line can wrap a little differently from the Preview.