



# User Guide

GoFormz Mobile Forms app for Windows

Version 2.1.1081

November 28, 2017

# How to navigate this User Guide

This User Guide is organized into the following sections:

- **Cj Yfj JYk** : A brief summary of the GoFormz Mobile Forms app for Windows and its capabilities.
- **@ [ ]b`gWYYb**: How to log into and start using the app.
- **BUj [ ] Ujcb`UbX`7 cfY7 ca dcbYbrg**: Introduction to the app's navigation and functionality centers: the Navigation Panel, the Forms List, and the Form Viewer.
- **? Yni: i bWjcbU]Im** Review of the app's core functionality — creating and editing forms.
- **GYWNYX': ]YX`HndYg**: Review of some advanced GoFormz field types like Sketch and Location.
- **: cfa `lfUbgZyfg`UbX`ghUi g`W Ub[ Yg, CH Yf`Zfa `UWjcbg, and Bcb!Zfa `UWjcbg**: These three sections describe all the actions you that can perform in the app.
- **GYHj]b[ g`UbX`@ [ ci h** Review of the Settings screen and how to log out of the app.

If you are new to GoFormz and just getting started, we recommend you begin by reading the Overview, Navigation and Key Functionality sections, to get a fuller sense of the app's capabilities. If you are familiar with GoFormz and just want to better understand a particular action or field type, just select that action or field type from the table of contents below.

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## Overview

The GoFormz Mobile Forms app for Windows lets you fill out and manage your forms on a Windows device. This includes the following functionality:

- Create new forms from a template
- View your forms collection and fill out forms
- Manage existing forms, including editing, deleting, renaming, etc.
- Transfer forms to other users and receive dispatched forms
- Transfer forms to collaborate with colleagues and partners
- Download and share form PDFs
- Work online or offline

Things that you can do with the app include creating/editing templates, creating/viewing reports, or managing your account. The app's primary purpose is to make filling out forms on a Windows device easy and convenient.

A very high-level GoFormz use case might be:

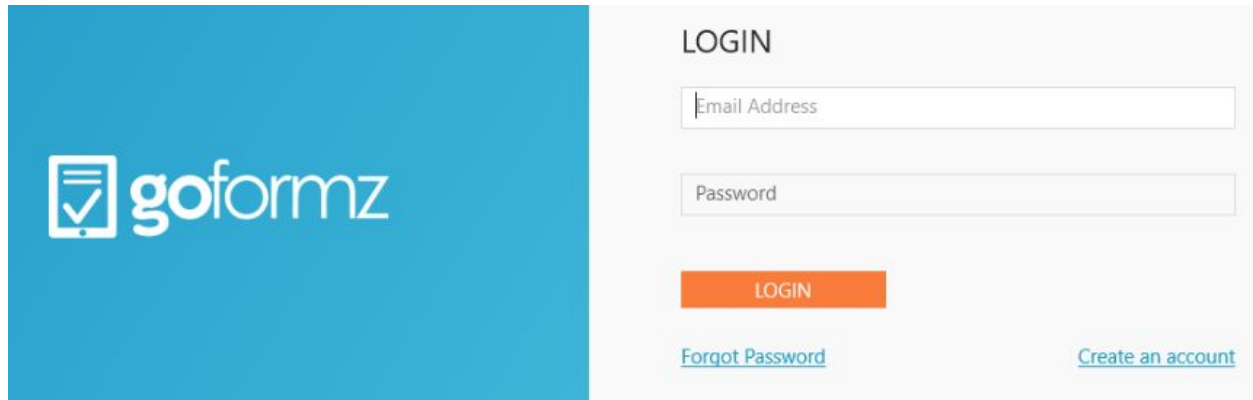
- Your GoFormz admin creates a template using the web interface. This makes the template visible to users in your account, including yourself.
- You and others in your organization use the mobile app to fill out forms using the new template as necessary.
- Your admin aggregates the form data submitted by everyone to compile reports and extract business insights.

Notice that the mobile app is only concerned with the second bullet point of this use case. You will have to log into the GoFormz web interface to perform the other actions.

The GoFormz Mobile Forms app for Windows can be used on any Windows 10 device, including smartphones, tablets and desktop devices, with the best experience on tablets and desktop devices.

## Login Screen

When you first run the GoFormz Mobile Forms app on your Windows device, you will see the app's login screen.



LOGIN

Email Address

Password

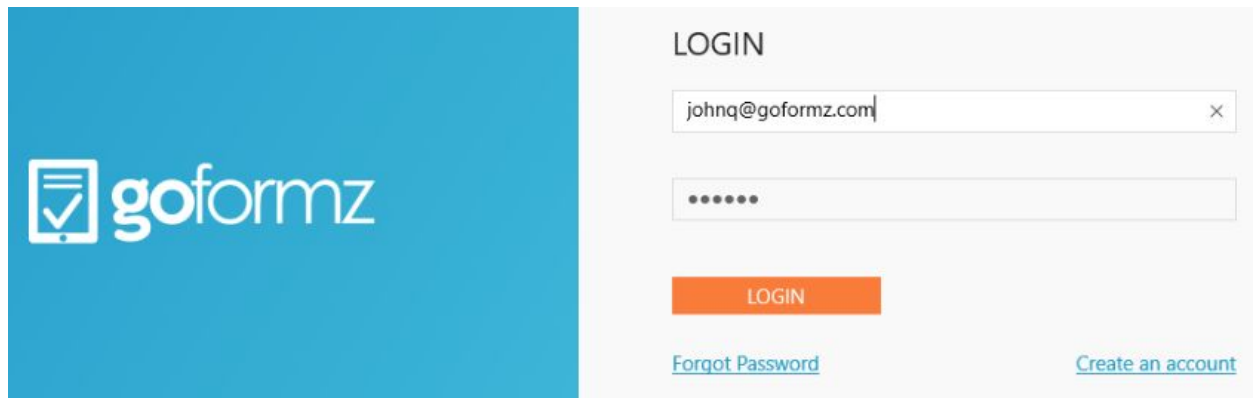
LOGIN

[Forgot Password](#) [Create an account](#)

If you already have a GoFormz account, you can use this screen to log in. If you have an account, but can't remember your password, you can reset your password. And if you do not have an account, you can create one.

### Log in

To log in, simply enter your Email Address and Password in the fields provided, and press the **LOGIN** button. In the example below, we are logging into the account of the user with email address [johnq@goformz.com](mailto:johnq@goformz.com).



LOGIN

johnq@goformz.com

.....

LOGIN

[Forgot Password](#) [Create an account](#)

## Reset your password

If you forgot your password, simply press the **cf[ chDUggk cfX** link. Your browser will open to the GoFormz password reset page, where you will be instructed to submit your email address. Once you do so, you will receive an email that will guide you through the password reset process.

## Forgot your password?

Enter your email address to reset your password.

## Create a new account

Most app users will never need to create an account — for the most part, if you are using the app you probably already have an account. However, if you are a brand new GoFormz user, this option is here for you.

Create a new account on the login screen by pressing the **7 fYUH'Ub'UWti bh** link. You will be prompted to enter your personal and company information (see below). Press the **7 fYUH': fYY' 5Wti bh** button when you are done filling out all the fields. You will immediately be logged into your brand new account.

### Create Free Account

<input type="text" value="johnq@goformz.com"/>	<input type="password" value="•••••"/>
<input type="text" value="John"/>	<input type="text" value="Quincy"/>
<input type="text" value="GoFormz"/>	<input type="text" value="415-555-5555"/>
<input type="text" value="100 - 9,999"/> ▾	<input type="text" value="Technology"/> ▾
<input type="text" value="United States"/> ▾	<input type="text" value="Promo Code"/>

I agree to the GoFormz [Terms of Service](#).

[I already have an account](#)

By default, your new account will contain several templates:

- **FYUX`AY**: A brief intro with some useful information to get you started with GoFormz.
- **HYa d`UHYg`Ei JW`GHUfh; i JXY**: Some tips on how to create form templates.
- **GUa d`Y`K cf`CfXYf**: An example work order template that includes most field types offered by GoFormz.
- **5`Z`XYf`cZGHUfhf`HYa d`UHYg**: Templates for some of the most common form types, including expense reports, timesheets, project proposals, and more. Use these as a starting point for building your own templates.

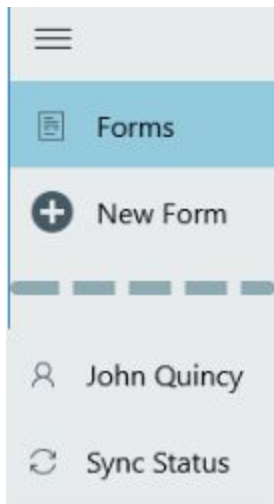
Creating new forms using these templates is a great way to learn about GoFormz and try out the features. However, to use the app for one of your real-life use cases, you will likely want to log into the web interface and build your own form template first.

## Navigation and Core Components



There are three places in the app that serve as its navigation and functionality centers: the [Navigation Panel](#) that is always present on the left side of the app, and the [Forms List](#) and [Form Viewer](#) screens where you will spend most of your time as an app user. In this section, we go over these three core app components.

### Navigation Panel

The Navigation Panel can be found on the left side of the app, and is always visible regardless of where you are in the app.



The panel contains the following buttons:

- . Toggle all button labels on and off (e.g. display **: cfa g** vs just **g**). This is handy in case you forget what the icons mean.
- : **: cfa g**: Open the [Forms List](#), where you can view a list of all your forms and allows you to manage those forms.

- **BYk : cfa** : [Create a new form](#) based on any of the templates available to you, and launch the new form in the [Form Viewer](#).
- **OMci fl gYfbUa Y2**. Open the [GYHjb\[ g screen](#), which lets you change personal settings, log out of the app, and view app information.
- **GnbWGHUi g**. See when the app last sync'ed to your GoFormz account, and [perform a manual sync](#) if needed.

## Forms List

You can access the Forms List via the **: cfa g** button in the [navigation panel](#). This screen's purpose is to help you quickly locate any of your existing forms and manage them.

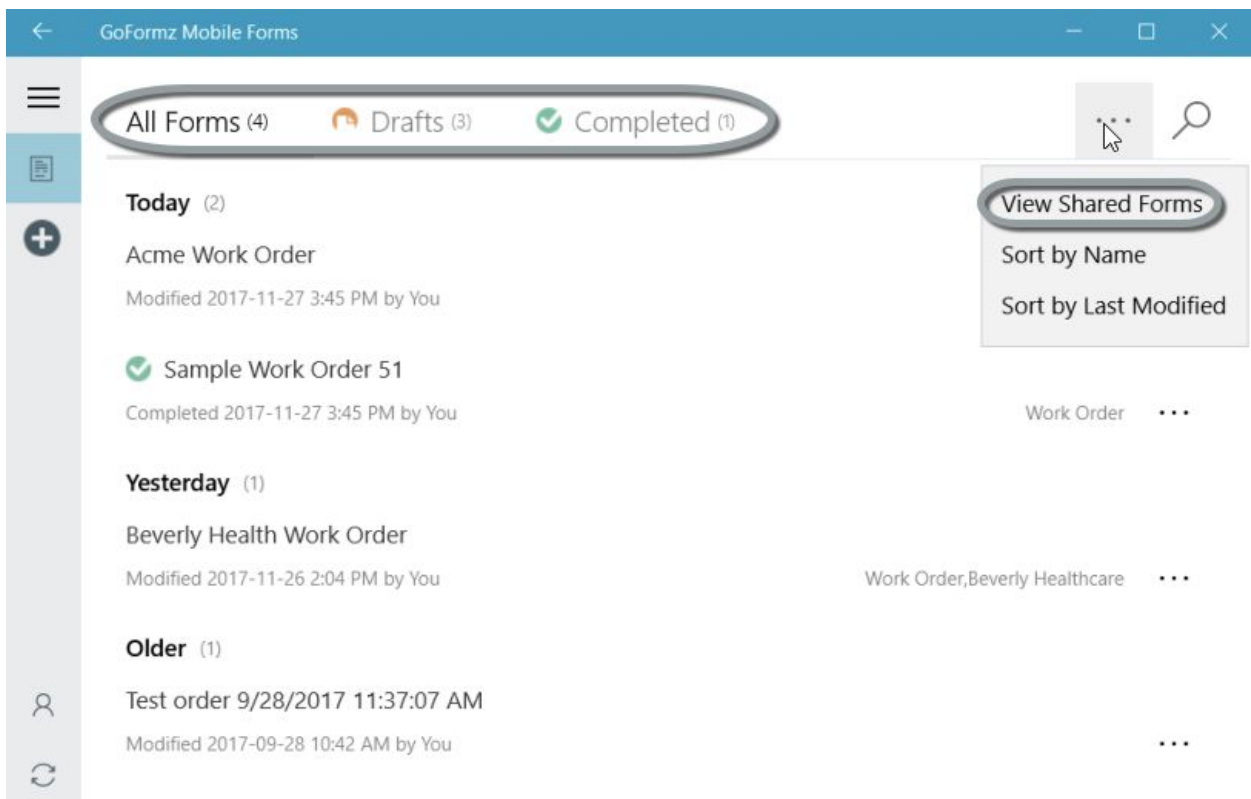
The Forms List screen consists of four sub-lists (three tabs and a menu option) that filter your forms by their status and assignment:

**8 fUZg**. List of all forms with [Draft status](#) that are assigned to you.

**7 ca d`YHYX**. List of all forms with [Completed status](#) that are assigned you.

**5``: cfa g**: List of all forms that are currently assigned to you. This is combination of the previous two tabs.

**G UFYX': cfa g**: List of all forms assigned to any [group](#) of which you are a member. This is accessible via the **JJYk `G UFYX': cfa g** option in the **Q"Q** menu in the upper right.

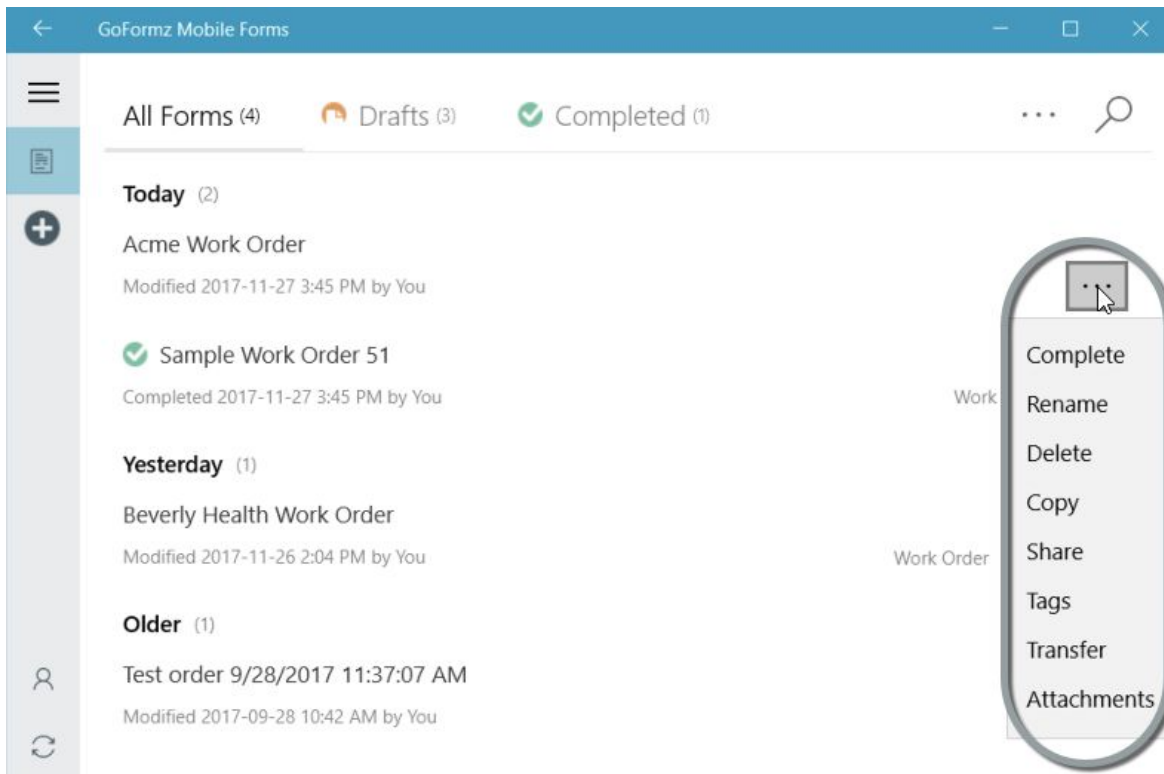




You can sort any of these form lists by name or by last modified timestamp using the **GcfhVmi BUa Y** and **GcfhVmi@UghA cXJZYX** options from the **O"Q** dropdown menu in the upper right corner. You can also search your forms by name using the **button** in the upper right. [See here for more on searching.](#)

**5 Wjcbg"** Once you locate the form that you are looking for in the Forms List, there are a few things that you can do with it:

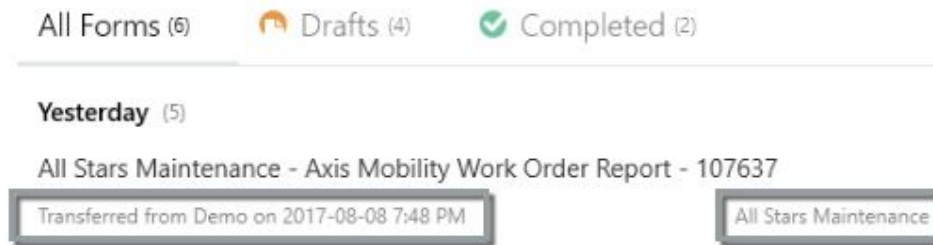
- Tap/click the form name to view or [edit](#) it in the [Form Viewer](#).
- Use the **O"Q** dropdown menu to the right of the form to perform another action on the form. The following actions are available (Note that you may only have a subset of these options, depending on your [user permissions](#).):
  - [7 ca d`YH`fB fUZg`cb`nt](#): Change form status from Draft to Completed.
  - [FYcdYb`f7 ca d`YH`X`Z`fa g`cb`nt](#): Change form status from Completed back to Draft
  - [FYbUa Y](#): Change the form's name.
  - [8 Y`YH`](#): Delete this form
  - [7 cdm](#): Create a copy of this form, retaining all completed fields.
  - [G UfY](#): Generate a PDF of the form and either download it to your device or share it via an app.
  - [HU`g](#): Add or remove [form tags](#).
  - [HfUbgZf`fB fUZg`cb`nt](#): Transfer this form to another user or group.
  - [5 HUW a Ybhg](#): Add or remove [form attachments](#).



Finally, notice that each form in the list will display the following metadata underneath its name:

- The last action that was performed on this form: e.g. “modified”, “transferred” or “completed”.
- The timestamp when this action occurred.
- The user who performed the action.
- Any tag associated with the form. (Note that while the tags are displayed, you cannot manage them via this app.)


In the example below, the action is “transferred”, the timestamp is “2017-08-08 7:48 PM”, the user is “Demo” and the tag is “All Stars Maintenance”.

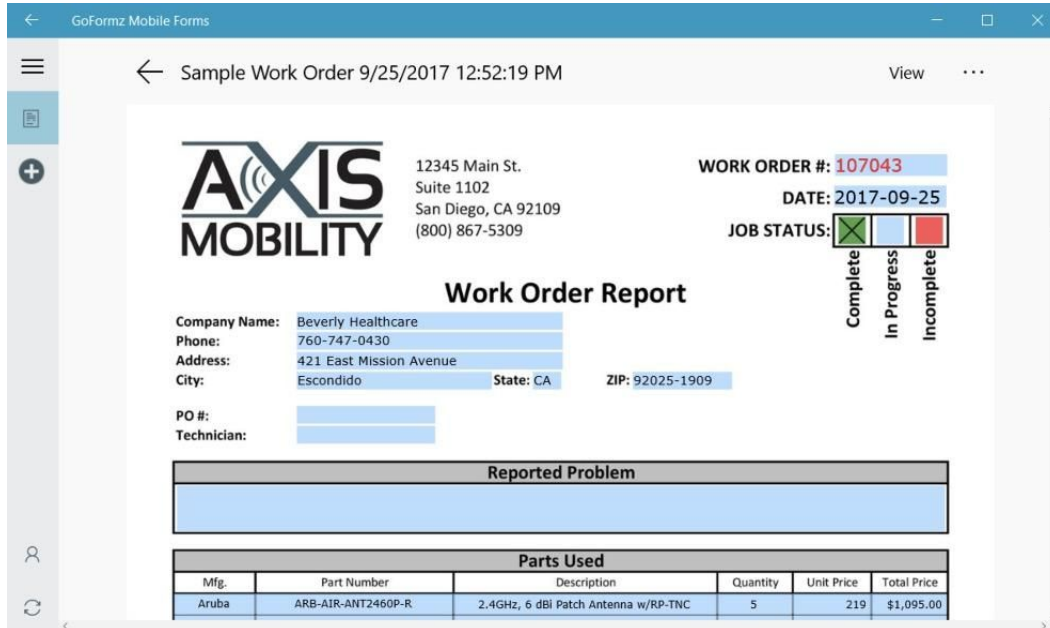


## Form Viewer

The Form Viewer allows you to view and/or edit an individual form. You can access this screen by selecting an existing form from the [Forms List](#), or via the [form creation](#) workflow. Note that only Draft forms will be editable when opened in the Form Viewer. Completed forms will open in view-only mode.

The Form Viewer supports two different modes for viewing and editing your form:

- : **cfajjyk**: This shows the form with the same layout that it will have in the PDF output. Editable fields in the form will be highlighted, as shown below in blue. Press any one of these fields to [fill it out](#).



**Axis Mobility**  
12345 Main St.  
Suite 1102  
San Diego, CA 92109  
(800) 867-5309

**WORK ORDER #: 107043**  
**DATE: 2017-09-25**  
**JOB STATUS:**  Complete  In Progress  Incomplete





### Work Order Report

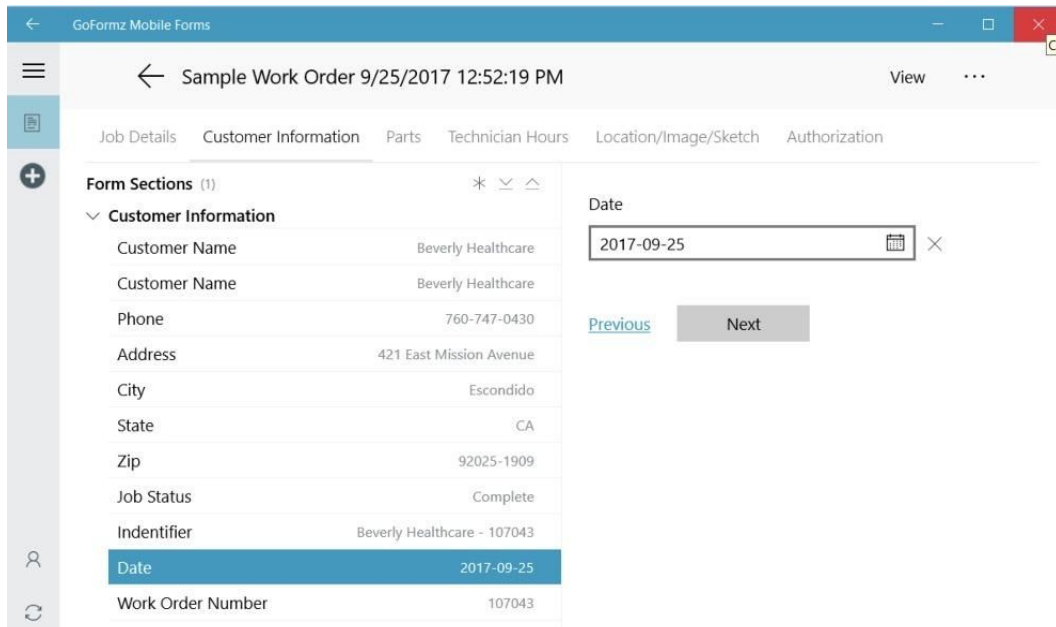
**Company Name:** Beverly Healthcare  
**Phone:** 760-747-0430  
**Address:** 421 East Mission Avenue  
**City:** Escondido **State:** CA **ZIP:** 92025-1909

**PO #:**  
**Technician:**



**Reported Problem**

Mfg.	Part Number	Description	Quantity	Unit Price	Total Price
Aruba	ARB-AIR-ANT2460P-R	2.4GHz, 6 dBi Patch Antenna w/RP-TNC	5	219	\$1,095.00

- : **@ghjjyk**: This shows a more standardized view of the form, with the form field names displayed on the left grouped into sections, and the sections grouped into tabs that appear along the top. Each section can be individually expanded/collapsed, or you can use the icons at the top to  expand,  collapse or  toggle all sections in the tab. Select a form field name on the left to see the field on the right, then tap/click the field on the right to [fill it out](#). In the example below, the **8 UNY** field is selected.



**Job Details** **Customer Information** **Parts** **Technician Hours** **Location/Image/Sketch** **Authorization**

**Form Sections (1)** \*  

▼ **Customer Information**

Customer Name Beverly Healthcare

Customer Name Beverly Healthcare

Phone 760-747-0430

Address 421 East Mission Avenue

City Escondido

State CA



Zip 92025-1909

Job Status Complete

Identifier Beverly Healthcare - 107043

**Date** 2017-09-25

Work Order Number 107043








Date: 2017-09-25  


[Previous](#) [Next](#)

You can toggle between the Form View and List View using the **View** menu in the top right. You can switch between the two views anytime, and all changes made in one view will be reflected in the other.

While both views work on all devices, Form View is typically preferred on a tablet or laptop, where there is more real estate to view the full form layout, whereas List View is preferred on a smartphone where screen sizes tend to be smaller and a list may be easier to navigate.

In addition to its main functions of letting you view and edit a form, there are several other actions available via the **More** menu in the upper right:

-  [Mark as Complete](#): Change form status from Draft to Completed.
-  [Mark as Draft](#): Change form status from Completed back to Draft
-  [Rename](#): Change the form's name.
-  [Delete](#): Delete this form
-  [Duplicate](#): Create a copy of this form, retaining all completed fields.
-  [Print](#): Generate a PDF of the form and either download it to your device or share it via an app.
- [Tags](#)
-  [Transfer](#): Transfer this form to another user or group.
- [Attachments](#)

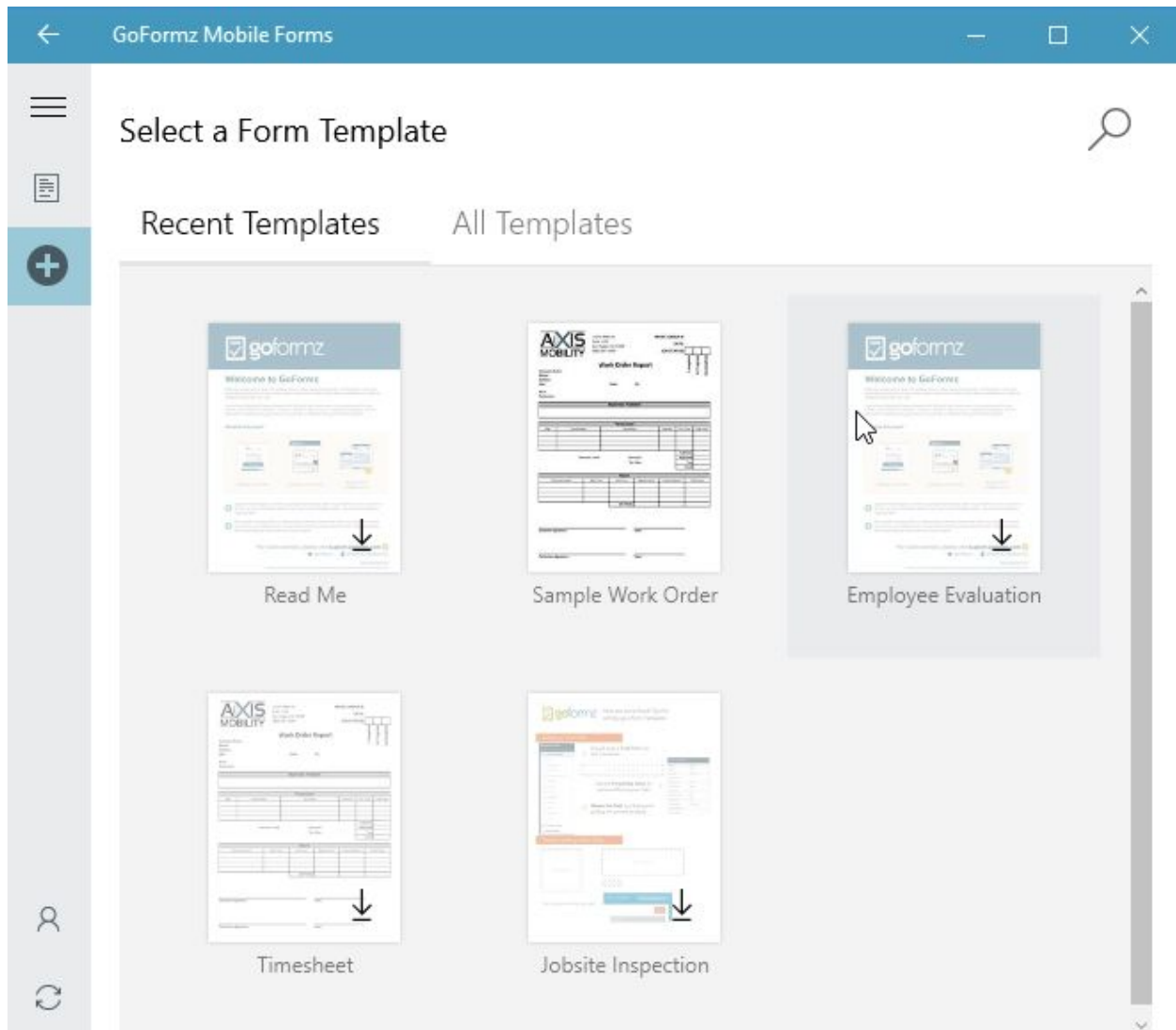
To go back to the [Forms List](#), just press the  button in the upper left. This will save your form and open the Forms List.

## Key Functionality: Form Creation, Editing, and Search

The main purpose of the GoFormz Mobile Forms app for Windows is to allow users to find, create and fill out forms. We go over these three key functions here.

### Creating a new form

To create a new form, press the **+** button in the [Navigation Panel](#). You will be directed to select a template, as shown below.



The template screen has two tabs:

- The **Recent Templates** tab lists the templates that you have accessed most recently.
- The **All Templates** tab lists all templates that are available to you.


Press the desired template to launch the [Form Viewer](#) with a brand new form created from that template.

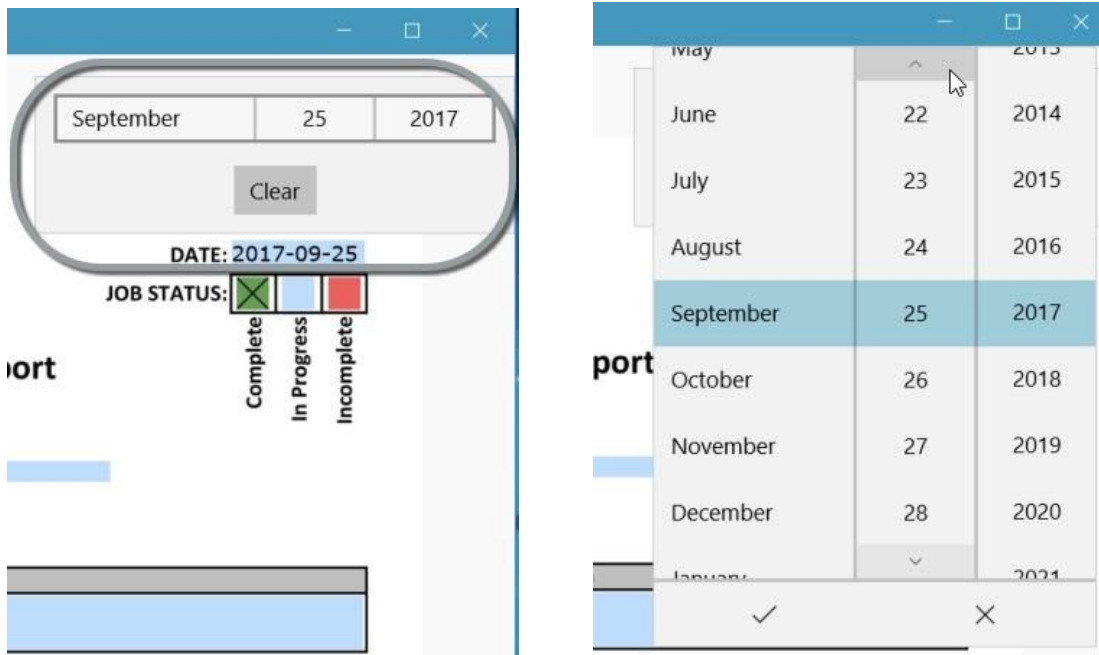
You are now ready to [fill out the form](#).


## Filling out (editing) a form

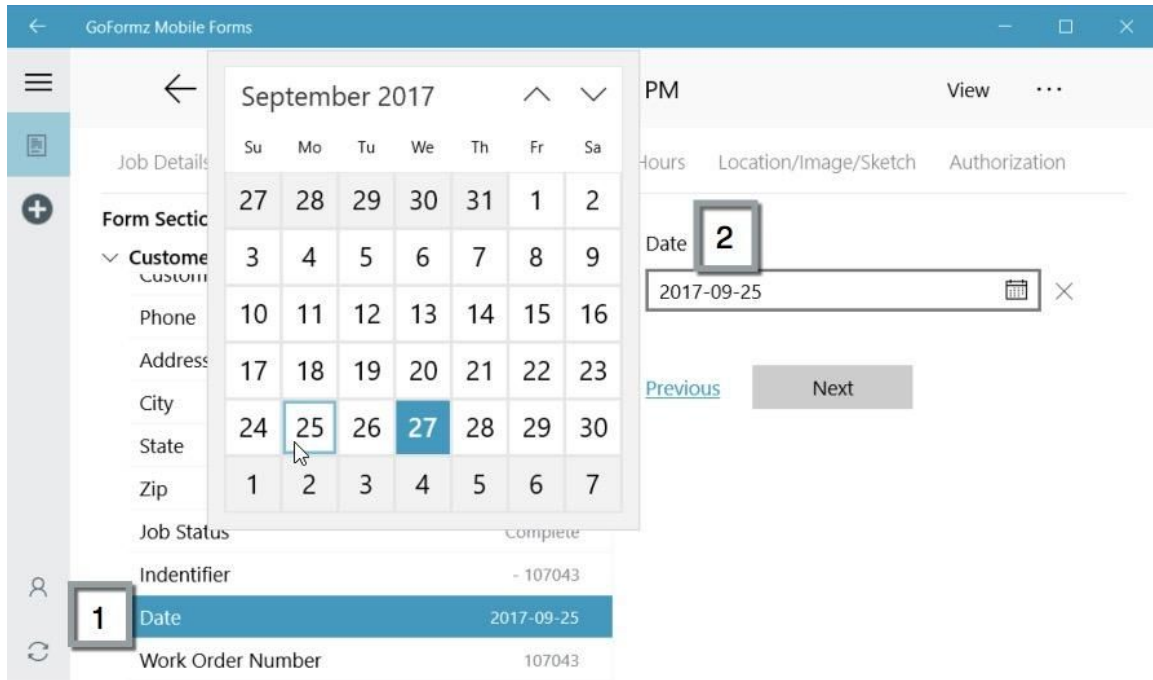
To continue editing an existing form, open it from the [Forms List](#). To begin filling out a new form, go through the [form creation](#) flow. Either way, you will end up in the [Form Viewer](#) screen.

You can use either the Form View or the List View to fill out your form. You can toggle between the two views at any time using the **JYk** menu at the top of the Viewer, and changes you make in one view will be reflected in the other. Read the [Form Viewer](#) section for more about these two views.

- To fill out a field in the  : **cfa JYk**, tap/click its highlighted area. An input control will appear, letting you fill out the field. In the example below, we select the blue “Date” field to pull up the date selection control (left), then press the control and use the scroll selector to choose the desired date (right).



- To fill out a field in the  @ghJYk, press the field name on the left to see the actual field display on the right, then tap/click the field to launch an input control and fill it out. In the example below, we select the “Date” field name on the left (1) to see the field on the right (2), then tap/click the date field on the right to launch the calendar control and use it to choose the desired date.




There are many different controls that range from a simple textbox with a cursor prompting you to type in some text, to a set of drawing tools letting you upload an image and sketch on top of it. We go over some of the more advanced controls in the [Selected form fields](#) section of this guide. You can also browse our [summary of all available field types](#) to get a good sense of what is available.

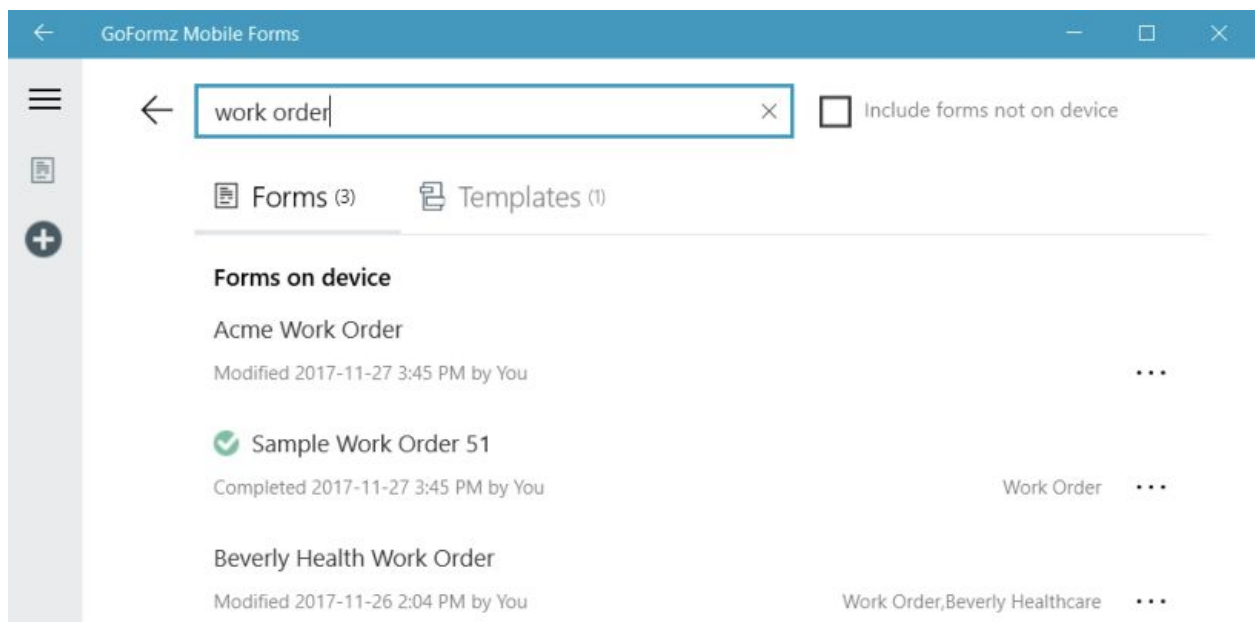
The Form Viewer will automatically save any changes you make to the form. This means you can stop filling out the form at any point, and then come back to it later.

Once you are done filling out your form, you will typically want to either [complete it](#) or [transfer it to another user](#).

## Searching for an existing form or template

GoFormz lets you search for forms and templates by name. This is very useful when you have a lot of forms and templates in your account, making it difficult to find them simply by browsing the [Forms List](#) and [template selection screen](#).

To use the Search feature, navigate to the Forms List and press the  button in the upper right to launch the search screen. Next, type your search string in the text field at the top. The search results will appear below — forms with your search string in their name will be in the **Forms** tab, and templates in the **Templates** tab. In the image below, we searched for the phrase “Work Order” and found 3 forms and one template with that phrase in their names.



Toggle on the **Include forms not on device** option if you want to search all forms to which you have access, not just the ones on your device. This is especially useful for finding older completed forms, since completed forms are removed from your device after 14 days to save space.

Once you find the template or form you are looking for, press it to launch it in the [Form Viewer](#), or expand the **Actions** Menu to perform an action on your chosen form.



## Selected Form Fields














In this section, we go over how to use the inputs for several selected form field types. We will focus here on some of the more advanced field types, and omit basic ones like text boxes, dropdowns and checkboxes, which most readers will know how to use already. [See here for a brief overview of all available field types.](#)

### Sketch field






This field lets you add a simple sketch to your form using standard drawing tools like lines, fills, various shapes, etc. The field might be positioned on top of an existing image that you are expected to mark up, or it might give you a blank slate to draw on. Perhaps the most frequent use case is taking a photo of something in the field and then marking it up, as in the example below.








Let's go over the Sketch field controls:

 , 	Add an image to your sketch by either activating the camera and taking a picture (  ) or adding an existing image from your device (  ). JPEG, PNG, GIF, and BMP image formats are supported.
TOOLS	Select the drawing tool you want to use from this dropdown. We review all available drawing tools below.
SIZE	Change the line width or font size of the selected drawing tool using this slider. This applies to the Pencil, Arrow, Line, Highlighter, Circle, Rectangle and Triangle tools (line width) as well as the Text tool (font size). It does not apply to the Select and Fill Color tools.
COLOR	Change the color of the selected drawing tool using this dropdown. You can choose one of the basic colors there by default, or specify your own color using a 6-digit hexadecimal RGB code.
 , 	Bring the selected element(s) to the foreground (  ), or send them to the background (  ) using these buttons in the upper right. You can select elements using the Select tool.
	Delete the selected element(s) from your drawing. If no elements are selected, this will clear the entire drawing (don't worry, it gives you a confirmation dialog first).
 , 	Close the sketch pad and save your changes (  ) or close and do not save (  ) with these buttons at the bottom.

Now let's do a quick review of the drawing tools available in the **Hcc`g** dropdown menu. All the tools with the exception of Fill Color and Text work via drag-and-drop.

 Pencil	Draw on the sketch pad like you would with pencil on paper, as shown in the image above.
 Line	Draw a straight line between two endpoints.
 Arrow	Draw an arrow between two endpoints.
 Highlighter	Draw semi-transparent lines as you would with a highlighter on paper. This is exactly like the Pencil tool, except the lines are semi-transparent instead of solid.
 Circle	Draw an unfilled circle.




 Rectangle	Draw an unfilled rectangle.
 Triangle	Draw an unfilled triangle.
 Select	Select individual elements in your drawing by tapping/clicking on them, or select multiple elements using a drag-and-drop lasso.
 Fill Color	<p>Fill in the chosen element(s) with the selected color. You can use this in two ways:</p> <ol style="list-style-type: none"> <li>1. Switch to the Fill Color tool, select a color, then tap/click an element in order to fill it, or</li> <li>2. Choose several elements with the Select tool, then switch to the Fill Color tool and select a color to change all chosen elements to that color.</li> </ol> <p>For elements created using the Pencil, Line, Arrow and Highlighter tools, this will change the element to the target color. For elements created using the Circle, Rectangle and Triangle tools, you will want to do different things depending on the desired outcome:</p> <ul style="list-style-type: none"> <li>• To change the element's fill color, use method 1 above (direct tap/click);</li> <li>• To change the element's stroke color use method 2 above (Select tool).</li> </ul>
 Text	Add text to your sketch.

## Image field

This field lets you add an image to your form. JPEG, PNG, GIF, and BMP image formats are supported.








Tap/click the field to open up the menu as shown above. The menu consists of three icons:

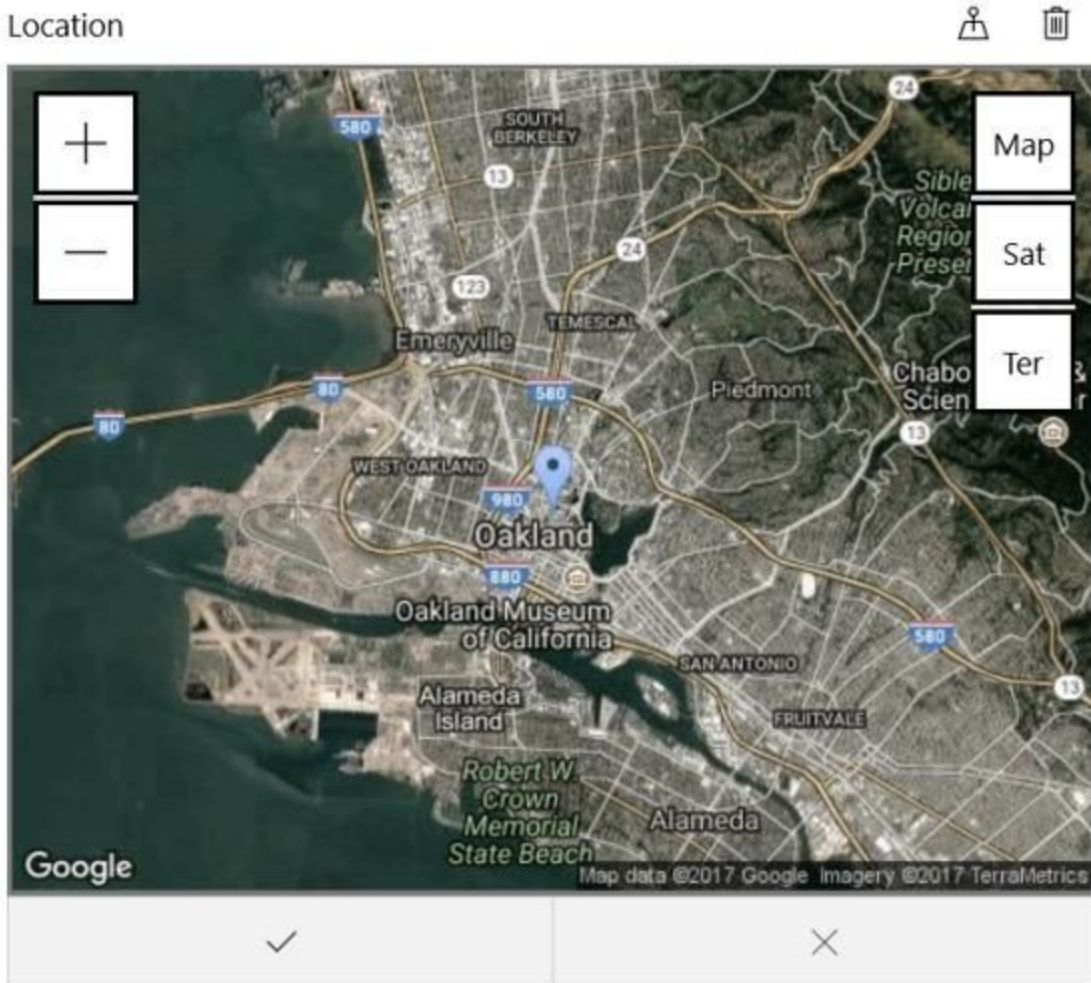
	Open up your device's camera, take a picture, and place it in the field.
	Browse your device to find an existing image, and place it in the field.
	Remove the image currently in the field.

## Location field

This field lets you add a location to your form. Press the field to activate the controls shown below. It will automatically load your current location in Google Maps (asking you for permission if necessary), along with a couple of Google Map options:

-   buttons to zoom the map in or out, and
-    buttons to toggle between regular Map, Satellite and Terrain views.

The image below shows the Satellite view.



GoFormz provides two additional buttons:

	<b>GYhd]b</b> " Recalculate the pin location.
	<b>7`YU</b> " Clear the field.

When you are done, press  at the bottom to save your changes or  to cancel. When you save, it will either display the map with your chosen view and zoom level and the pin at your location, or it will simply display the pin's GPS coordinates. This depends on how the field's properties were set up in the form template.

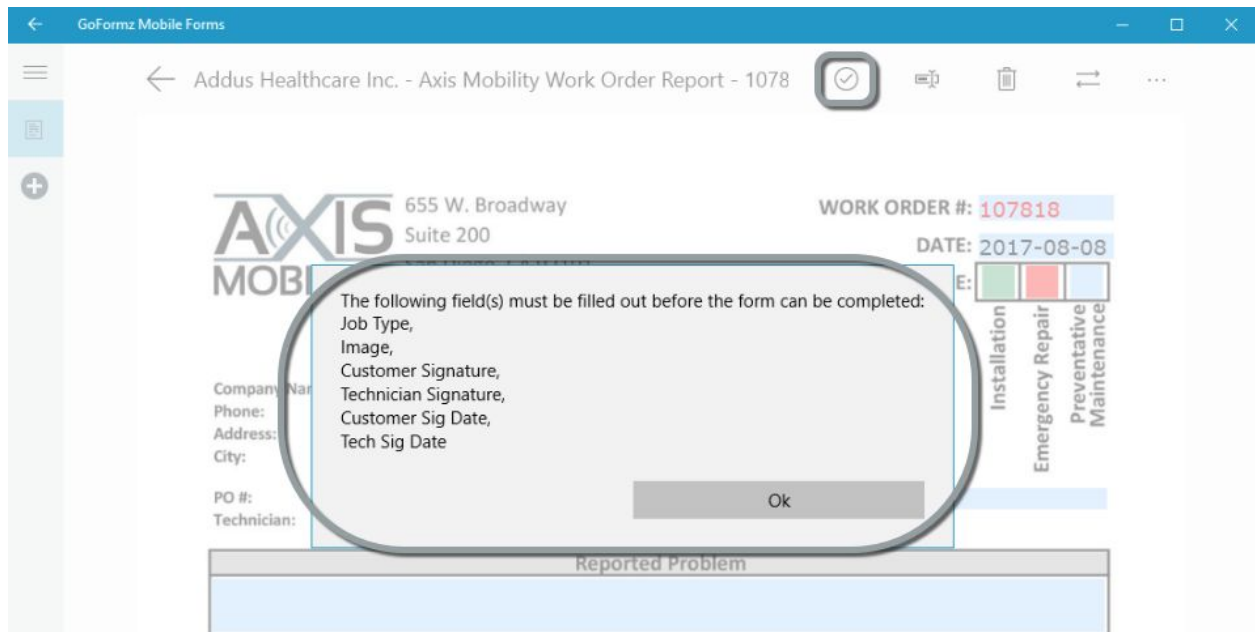
## Form Transfers and Status Changes

The actions described in this section have to do with transferring forms to other users and changing form status from Draft to Completed or vice versa.

### Completing a form

Completing a form means [changing its status](#) from Draft to Completed. This option is available in the [Form Viewer](#) header, as well as the [Forms List](#) form dropdown.

If there are required fields that you have not filled in, you will see an error message telling you that the form cannot be completed until these fields are filled in, and listing all relevant fields. Dismiss the error message, fill in those fields, and try completing the form again.



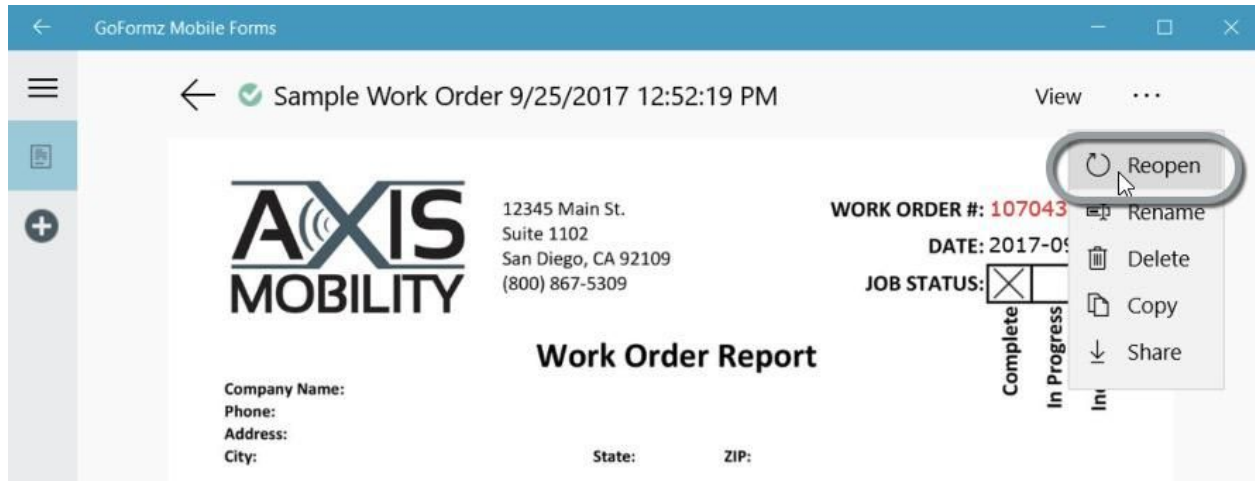
The screenshot shows the GoFormz Mobile Forms app interface. At the top, the title bar reads "GoFormz Mobile Forms". Below it, the header displays "Addus Healthcare Inc. - Axis Mobility Work Order Report - 1078" with a checkmark icon. The main content area shows the form details for "AXIS MOBILITY" at "655 W. Broadway Suite 200". The "WORK ORDER #: 107818" and "DATE: 2017-08-08" are visible. A large error message box is overlaid on the form, stating: "The following field(s) must be filled out before the form can be completed: Job Type, Image, Customer Signature, Technician Signature, Customer Sig Date, Tech Sig Date". Below the message is an "Ok" button. To the right of the message, there are three colored buttons: "Installation" (green), "Emergency Repair" (red), and "Preventative Maintenance" (blue). The bottom of the screen shows a "Reported Problem" section.


When you successfully complete the form, the **Save** button will change to a **Finalize** button (if you have the associated [permissions](#)), and field highlighting will disappear in the Form Viewer, indicating that you can no longer edit the form. If you wish to edit the form again, you will have to reopen it first.

If you are online when you complete your form, the app will immediately sync to your GoFormz account, uploading the newly completed form so that others can view it. If you are offline, the sync will happen as soon as you get online.

## Reopening a form

Reopening a form means [changing its status](#) from Completed back to Draft. This is typically done when you find an error in a completed form, since reopening the form is the only way to fix such an error. Note that depending on your [user permissions](#), you may not be able to reopen forms.





To reopen a completed form, use the  **F YcdYb** action available in the [Forms List](#) and [Form Viewer](#). The **F YcdYb** button will change to a **7 ca d'YH** button, and field highlighting will appear in the Form Viewer, indicating that you can now edit the form.

## Transferring to another user

Oftentimes, multiple people must touch a form before it is completed. For instance, two technicians might work on different aspects of a work order, and therefore may have to fill out different portions of the work order form. GoFormz supports this kind of workflow by allowing you to transfer a form draft to another user or to a predefined group of users. To learn more about user groups, see the [Users, Groups and Permissions](#) documentation.

To transfer a form, use the  **HfUbgZf** button available in the [Forms List](#) and [Form Viewer](#).

The **HfUbgZf: cfa** panel will appear, listing the users ( icon) and groups ( icon) in your organization. There are three tools that you can use here to find your transfer target:








- Scroll the alphabetically ordered list.
- Use the **I gYfg** and **; fci dg** checkboxes to filter the list by showing/hiding users and groups, respectively.
- Start typing the name of the desired target in the search box, and the list will filter as you type.

### Transfer Form ×

Who are you transferring to?

Show  Users  Groups

User / Group Name

-  Account Management
-  Alex Rennie  
arenniedemo@goformz.com
-  Alexis Brustad  
abrustaddemo@goformz.com
-  Amy  
aciminodemo@goformz.com
-  Andrew Stevens  
astevensdemo@goformz.com
-  Andrew Yi  
ayidemo@goformz.com
-  Angela  
akennistondemo@goformz.com

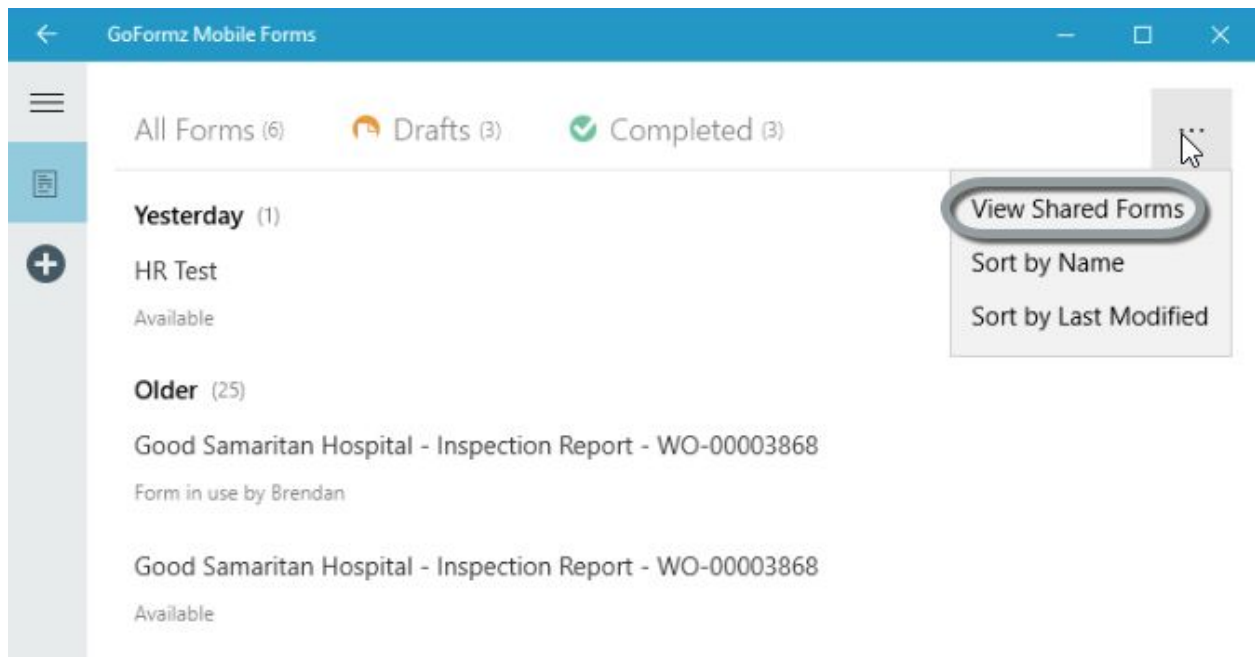


Once you have found your target user or group, press it to complete the transfer. The form will immediately disappear from your **8 fUZg** list and you will see a “Form Transferred” notification on your device. (Note that only Draft forms can be transferred — Completed forms cannot be transferred.)

If you find yourself transferring forms to the same users/groups over and over again, we recommend that you create an automatic workflow that performs the transfer for you. [See here for instructions on creating an automatic transfer workflow.](#)

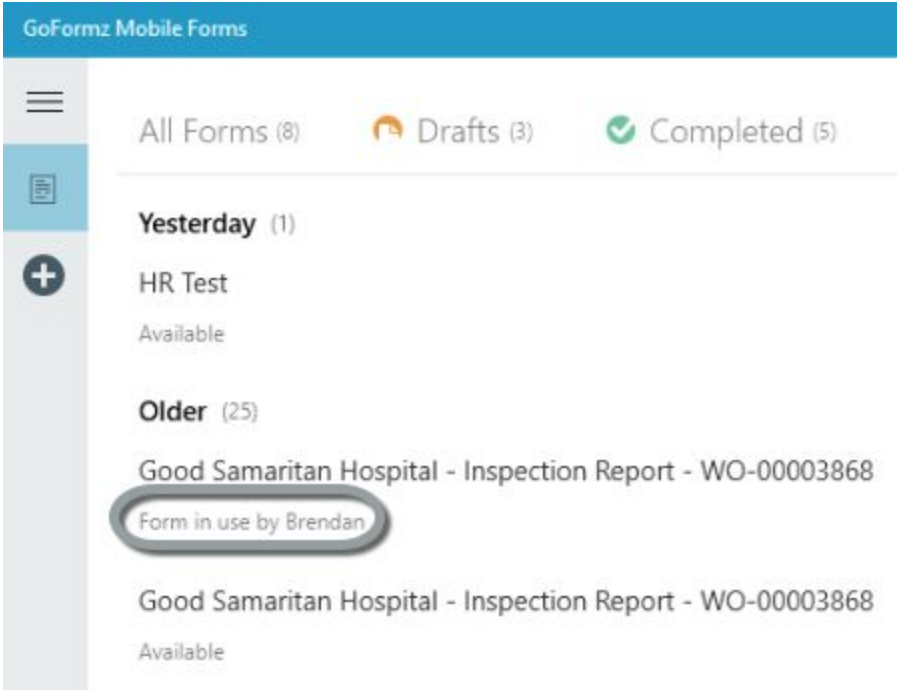
## Claiming a transferred form

If a form was transferred to you individually, the form will immediately appear in the **8 fUZg** tab of your [Forms List](#). You can simply tap/click the form name to start editing it.



If the form was transferred to a group in which you have membership, you have to go to the Shared Forms list to claim it. You can access the Shared Forms list in the Forms List screen by selecting the **JJK G UYX: cfa g** option from the **O"Q** menu in the upper right (shown above). To claim the form, simply tap/click it and then press **MYg** in the confirmation dialog box.


Any user within the share group can take ownership of a shared form in this way. Once you take ownership, the form will appear in your **8 fUZg** tab, allowing you to edit it as needed. The form will still appear in the Shared Forms list for all the other users in the group, but it will be marked as “in use” (see below). While you have the form is in use, no one else will be able take ownership of it until you share it back to the group. This ensures that two people can never edit the same form at the same time, creating a conflict.



## Other Form Actions

This section describes some additional actions that you can perform on forms.

### Downloading or sharing a form PDF

To generate a form PDF and either save it to your device or share it via an app, use the  **GA UfY** button available in the [Forms List](#) and [Form Viewer](#).

The **GA UfY: cfa** panel will appear. In the text field, enter the form pages that you want to export to PDF; leave this field blank if you want to export all pages.

### Share Form ×

All pages shared by default unless customized below.


Comma separated values such as: 1, 4-7, 9

**Export as Pdf** [Share](#)

From here, you have two options:

- **9I dcfhUg'DXZ** Press this button to save the form PDF to your device. You will see a standard Windows **GUj Y5 g** dialog box, letting you enter the name of your PDF and select the folder where it should be placed. Press **GUj Y** when you are done, to place the PDF in the desired folder on your device.
- **GA UfY**: Press this button to share the form PDF via one of the apps on your device. You will see a **GA UfY** dialog box, with a list of some of the apps on your device (e.g. Mail, Skype, OneDrive, etc.). Select the app through which you want to share your form PDF.


## Renaming a form

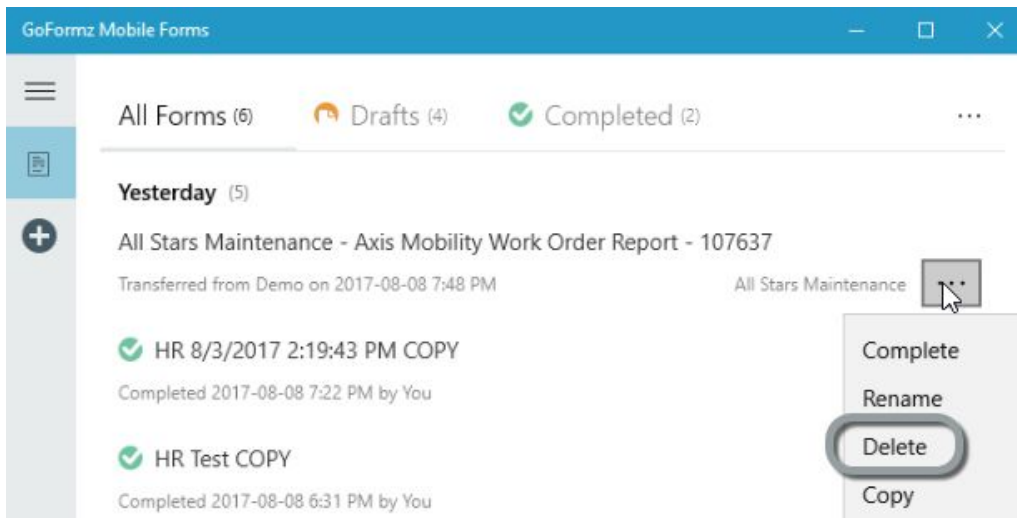
To change your form's name, use the  **R** button available in the [Forms List](#) and [Form Viewer](#). A dialog box will appear with the form's current name and a cursor, letting you edit the name. Press the **R** button when you are done editing, and you will see the name change.



If you find yourself renaming your forms often, consider changing the automated naming convention using the [Template Editor](#). By default, forms are named using the template name followed by the form creation timestamp, but this can easily be changed.


## Deleting a form

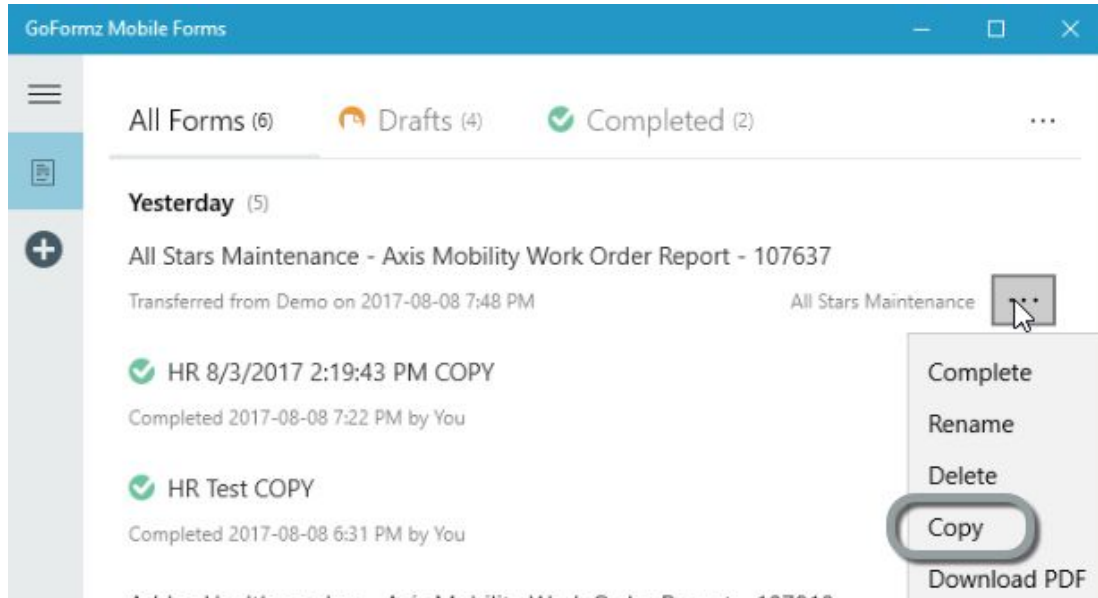
To delete a form, use the  **D** button available in the [Forms List](#) and [Form Viewer](#), then press **D** in the confirmation dialog box. The form will disappear from the Forms List.



**D**, so be careful when deleting forms! If you do need to restore a deleted form, contact GoFormz Support.

## Copying a form


To make a copy of your form, use the  button available in the [Forms List](#) and [Form Viewer](#). A copy of the form will immediately appear in your **8 fUzg**, with the same name as the original form, followed by the word “COPY”. You will typically want to [rename](#) the copy.

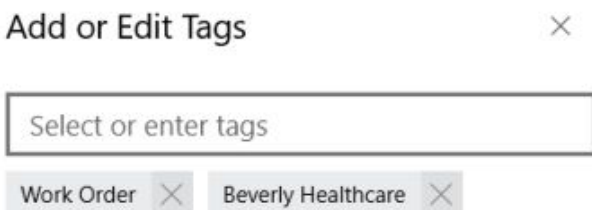


Copying a form can be useful when you want a new form that shares a lot of data with a form that you've already filled out. In such a situation, copying the existing form and changing the few fields that are different can save time over filling out a blank form from scratch.

## Adding/Removing Form Tags

A [tag](#) is a type of custom metadata that you can add to a form. Tagging your forms lets you filter them in the **cfag** tab of the GoFormz web interface. There, you can see the tag(s) associated with each form, and click on a tag name to view only the forms containing that tag. This can be very useful for organizing form data.

To add or remove a tag from your form, use the  button available in the [Forms List](#) and [Form Viewer](#). The **5XX'cf'9XjhHUg** panel will appear, listing your form's existing tags (“Work Order” and “Beverly Healthcare” in the image below).



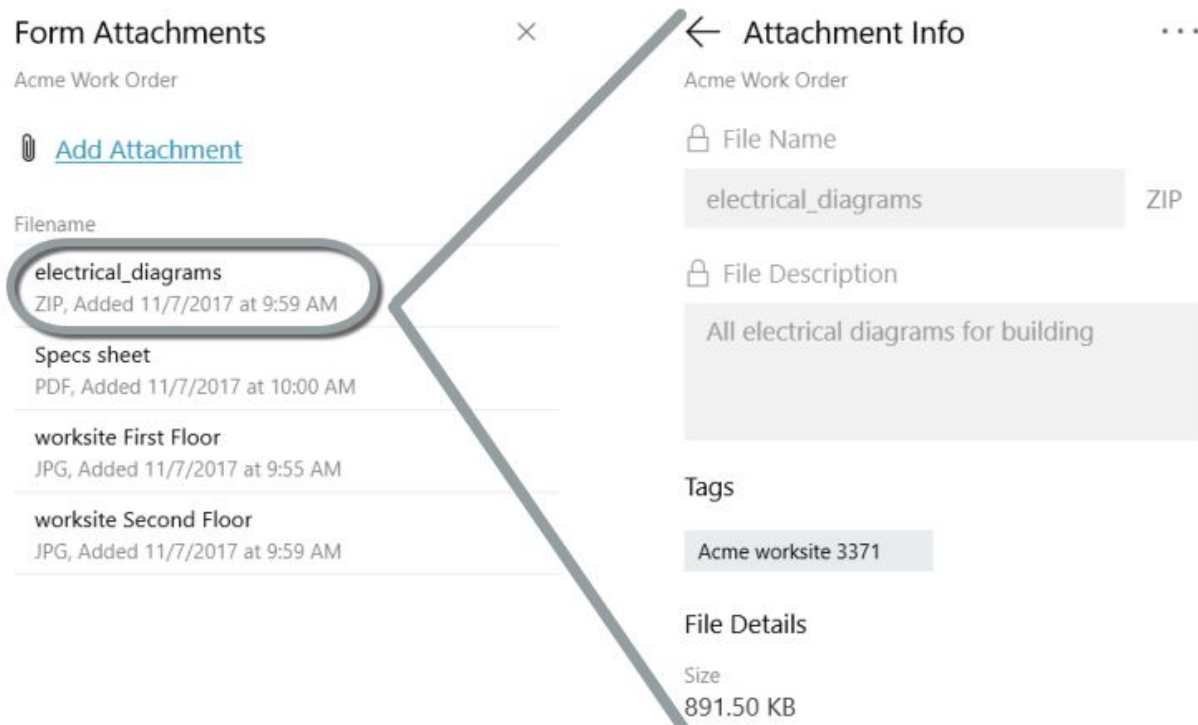
- **Hc`UXX`U`bYk`HJ`** , type it into the text box. As you type the tag, you will see a list of existing tags in your account that contain the string you have typed so far. You can select one of these existing tags, or continue typing in a brand new tag.
- **Hc`XY`YH`Ub`YI`]gh]b[`HJ`** , press the **L** next to it.

When you are done adding/removing tags from the form, simply press the **L** button at the top right corner of the **5`XX`cf`9`X]hHJ`g`** panel to dismiss it.

## Adding/Removing Form Attachments

GoFormz lets you attach one or more files (maximum file size 10MB) to any form. Note that attachments can only be added, edited, or removed for Draft forms; these actions are unavailable for Completed forms. [See here for more on form attachments, including use cases.](#)

To view and manage your form's attachments, use the **📎 5`HJW`a`Ybhg`** button available in the [Forms List](#) and [Form Viewer](#). The **:`cfa`5`HJW`a`Ybhg`** panel will appear, listing your form's existing attachments. Press on an attachment name to view its **5`HJW`a`Ybh`bZ`** panel, which includes the attachment's file name, type, description, tags, size, and dimensions (for image files). Both panels are shown below.



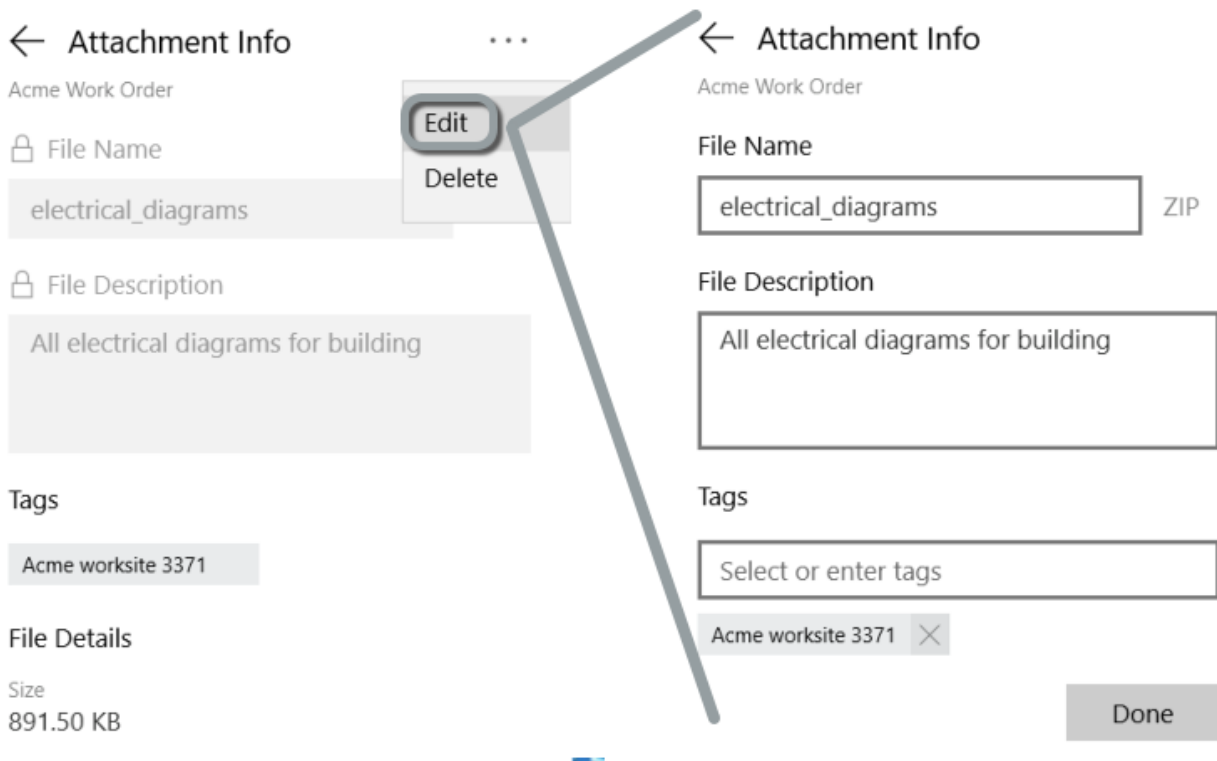
**Hc`UXX`U`bYk`UHJW`a`Ybh`** press the **📎 5`XX`5`HJW`a`Ybh`** button. This will open up your device's file browser. Select the file you want to attach in the browser to launch the **5`HJW`a`Ybh`**

**⚙️** editor. Edit the attachment properties (File Name, File Description and Tags) as needed, then press **⏎** to add your attachment. See below for more on these file properties.

**⚙️** choose **⏎** from the **⚙️** menu in its **⚙️** panel, then press **⏎** in the confirmation dialog box.

**⚙️** choose **⏎** from the **⚙️** menu in its **⚙️** panel to launch the editor, as shown below. Press **⏎** when you are finished with your edits. The following file properties can be edited:

- **⚙️**: In this example, the file name is “electrical\_diagrams”. You will often want to change the default file name to a more descriptive one. For instance, if you use a photo taken on your phone, the photo will have a generic name that you might want to change upon upload.
- **⚙️**: This is an optional field containing an image caption or file description. In this example, the description reads “All electrical diagrams for building”.
- **⚙️**: To add a tag, simply type it in and press Enter. You can add multiple tags in this way. To remove a tag, press the X to the right of the tag name. In this example, the file has one tag that reads “Acme worksite 3371”. Note that you cannot search or group attachments by file tag at this time, but we hope to add these features in the future.



## Non-Form Actions

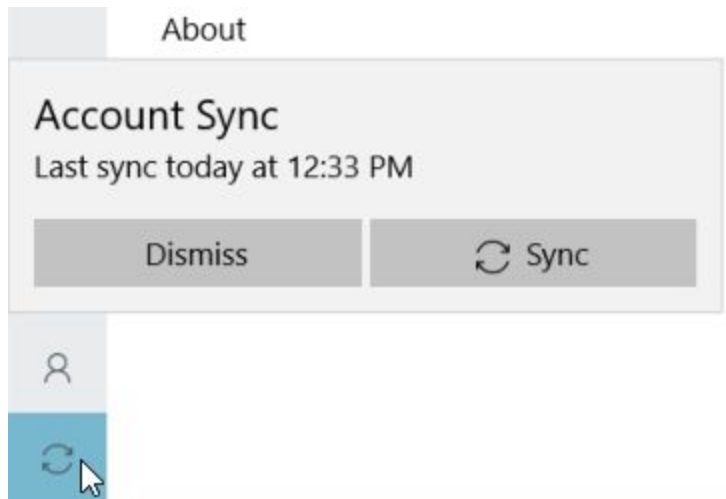
This section describes actions that do not directly affect a form. There is only one such action currently.


### Sync-ing the app to your account

The purpose of sync-ing your GoFormz Windows app is to make sure that the app and your account both have all the latest data. The sync does two things:

- Send any changes you made on your device since the last sync back to your account. This includes form creations, deletions and status changes.
- Fetch any changes that have happened in your account since the last sync to your device. This may include any new forms that have been assigned to you, any new templates that were created, etc.


The app automatically syncs every few minutes and an immediate sync is also triggered by a form completion, so you should not have much of a need to perform a manual sync — but it's there if you need it.




To see when your app was last sync'ed and/or perform a manual sync, press the  **GrbW** **GrUi g** button in the [Navigation Panel](#). The **5 Wti bhGrbW** dialog box will appear, showing the date and time of your last sync. Press **8 Jga Jgg** to close the dialog box, or **GrbW** to perform a manual sync.

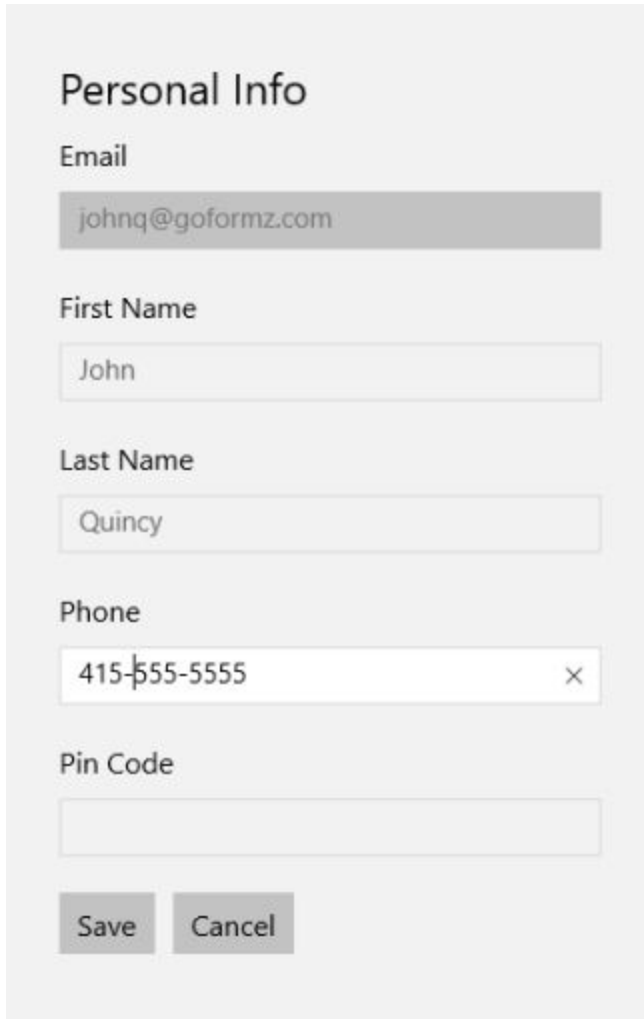


## Settings and Logout

To access your account and app settings, press the  button in the [Navigation Panel](#) on the left side of the app. You will see the following options:

 Press this to log out of the GoFormz Mobile Forms app for Windows.

 Press this to view and/or edit your personal information, including your name, phone number, and Pin Code. Note that you cannot change your email address here. You can only [change your email address](#) in the GoFormz web interface.



**Personal Info**

Email  
johnq@goformz.com

First Name  
John

Last Name  
Quincy

Phone  
415-555-5555

Pin Code

Save Cancel

