

Summary: Create forms that can be filled out and submitted on a mobile device. Completed forms can be viewed in the App Admin panel or delivered to an email address.

Prerequisites: Admin user

Steps

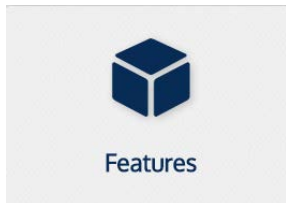
1. Login to the CMS, then click on the **eSV2Go App option**



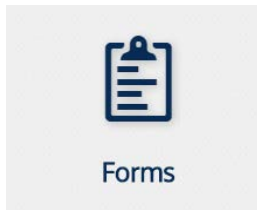
2. In the upper right, **select the section** you are going to work on



3. On the Home screen, click on **Features**



4. **FORMS**



Folders and Forms

5. **Folders** are useful for sorting the Forms into groups so it's easier for specific users to find. Ex. Parent Forms... etc.

6. To create a new **Folder**, click this icon. Name the folder. Click OK



7. Double click on the folder to put new Forms inside it. Click the + **New** button



8. If you have a Form that needs to be moved to a folder, click on the “move” icon and choose the appropriate folder

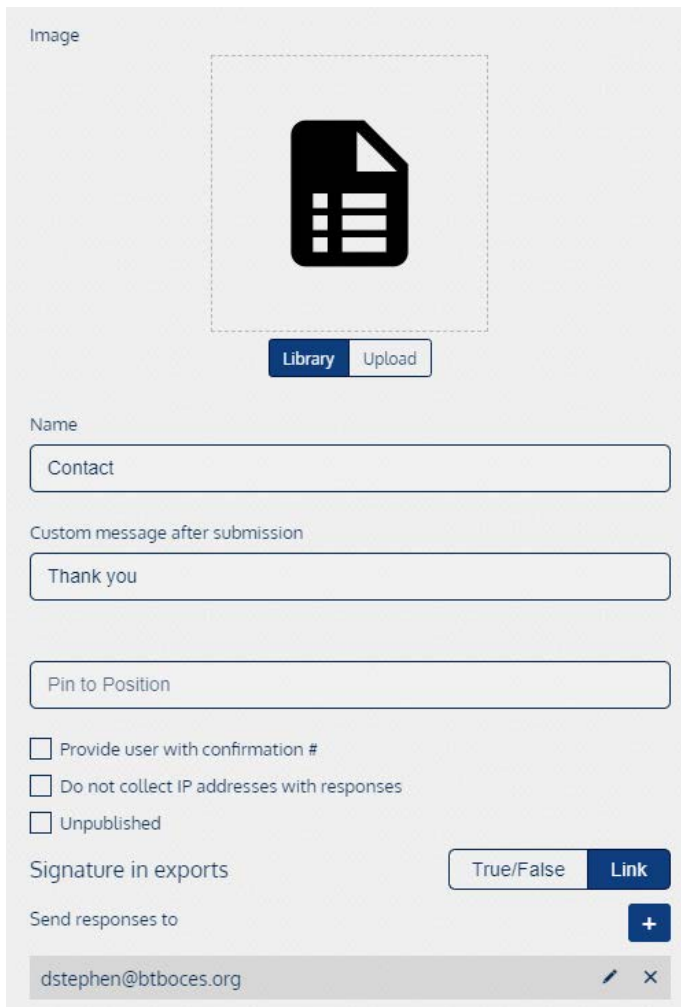


9. **Forms** can be edited, shared to other schools or deleted by using the icons to the right

10. It is possible to sort the Forms in a specific order by using the up/down arrows

11. When creating a new Form, a window will open where you can:

- a. Name the Form
- b. Create a Custom message to display after user submits the form. Ex: “Thank you. Someone will be right with you”
- c. Check boxes if you want to give confirmation numbers, not collect IP address or unpublish the form
- d. Choose to send submitted responses to certain email addresses (*if desired*)

A screenshot of a form creation interface. At the top, there is an 'Image' section with a dashed box containing a document icon and buttons for 'Library' and 'Upload'. Below this is a 'Name' field with the text 'Contact'. The 'Custom message after submission' field contains 'Thank you'. There is a 'Pin to Position' field. Below these are three checkboxes: 'Provide user with confirmation #' (unchecked), 'Do not collect IP addresses with responses' (unchecked), and 'Unpublished' (unchecked). The 'Signature in exports' section has a dropdown menu with 'True/False' selected and a 'Link' button. The 'Send responses to' field contains the email address 'dstephen@btboces.org' and a plus sign button.

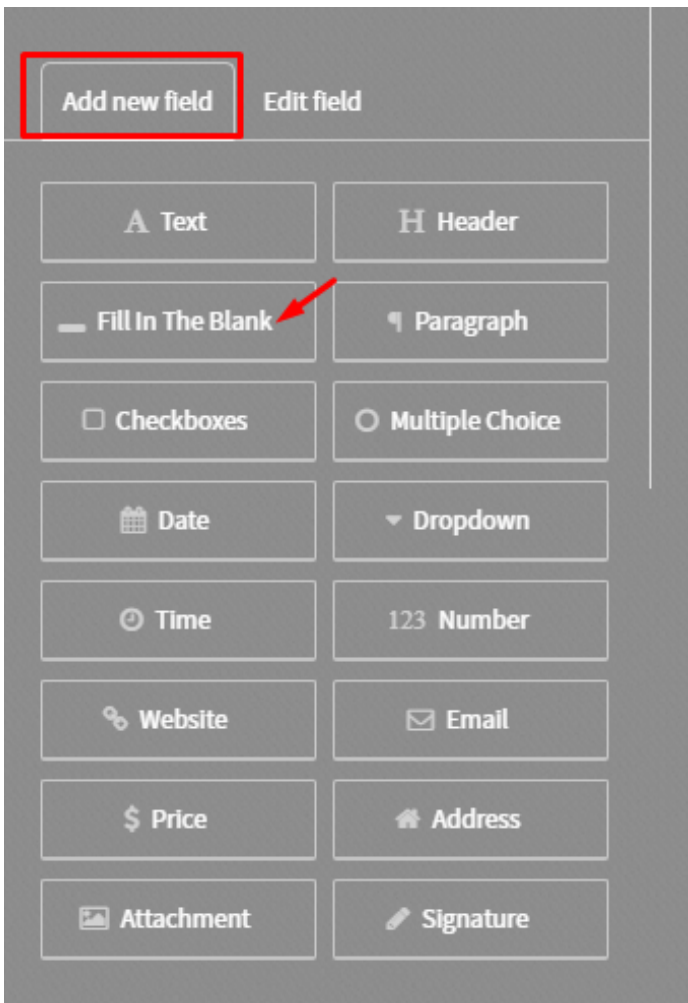
12. Add a description of the form if needed.

13. Click **Save & Edit** then **Apply and OK**

14. Now click the **Form Builder Icon** to create the form



15. You will now be able to **Add fields** to your forms. There are a number of fields to choose from



16. Choose a field (ex. Text)

17. Choose a **Label** for Field and check if it should be a required field.

Instructions can be added below the label if needed.

Note: Adding limitations like **Length Limits** will be noted on the form for the users

Changes are saved automatically

The 'Edit field' configuration panel shows the following settings:

- Buttons: 'Add new field' and 'Edit field'.
- Field Name: 'Last Name/First Name'.
- Type: 'text'.
- Label: 'Last Name/First Name'.
- Instructions: 'No middle initial'.
- Required: 'Required'.
- Size: 'Medium' (dropdown).
- Length Limit: Min '2', Max '6', 'words' (dropdown).

18. Add as many fields as needed.

19. Sort them by dragging and dropping

The form builder interface consists of two main sections:

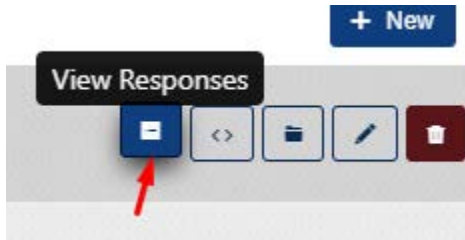
- Field Selection Panel:** A grid of field types including Text, Header, Fill In The Blank, Paragraph, Checkboxes, Multiple Choice, Date, Dropdown, Time, Number, Website, Email, Price, Address, Attachment, and Signature.
- Form Preview:** A live preview of the form with the following fields:
 - 'Last Name/First Name' (text input) with a red error indicator.
 - 'No middle initial' (text input) with a green plus and red minus button for sorting.
 - 'Who are you looking for?' (checkbox list) with options: Teacher, Support Staff, Administrator, and Other (text input).
 - 'Your email address' (text input).
 - 'Comment or Question' (text area) with a red error indicator.

A 'All changes saved' notification is visible in the top right corner of the preview area.

20. When complete, go back to Forms



21. Completed forms can be viewed and printed/saved/shared and finally processed in the app. Choose the View Responses button



Completed forms sent via email will come from "eSV2Go" and look like this:

The following response has been submitted from the Contact in the Walton Central School District app by esv2go:

Last Name/First Name	Stephen's, Deb
Who are you looking for?	Teacher
Your email address	Dstephen@btbooces.org
Comment or Question	No comment
Your Signature	

To add or modify Form Response recipients, please visit the esv2go Dashboard.

Thanks!

esv2go | Copyright © 2019 eSchoolView