



Solution Overview

Introduction

ProForm is a simple yet powerful app to extend the capabilities of your Salesforce platform allowing forms to be created, stored and referenced to suit many use cases.

The main advantage of ProForm over other form apps is that it is incredibly simple to create and use.

We've deliberately kept the feature set to a minimum needed to create powerful forms so:

- You can create these quickly
- You don't have to navigate through lots of design and configuration options to get something live
- You don't pay for things you are never going to use
- You make intelligent and optimal decisions on Salesforce Community / Experience Licences to control costs

Use Cases

ProForm is great for:

- Capturing someone's understanding of their work health and safety obligations
- Gaining consent for anything, be it a school excursion, doggie day-care or taking a booth at your community fair
- Capturing details from a specific person, time and place for recording purposes – such as Joe Smith completed a safe work refresher form, at the Jones St worksite at 10:15 am on 5/6/22

Solution Overview

Purpose	ProForm is designed where you want to capture data from customers and keep this record within your Salesforce org.
Application	You <i>don't</i> want to merge form data directly into a Salesforce object like a Contact or an Opportunity, you just want to capture form data and record who completed and when.

Mobile or Web	ProForm is mobile responsive, and form users are presented with a beautiful user experience on all their devices.
Form Portal	you can create a simple web portal within Salesforce and ProForm will allow your Form Users to access and complete the forms you assign them – great for onboarding a new partner, inducting a new volunteer to your not-for-profit or even welcoming a new member to your cultural or religious group
Capturing Consent	You can also capture consent and agreement, including e-signatures, declarations and acceptances.
Links or QR codes	You can email links to potential respondents or simply print and display a QR code.
Free Text	Collect free text data such as names, dates, currencies and numbers.
Statements	Use Statements to inform the user and offer the terms any agreements within the form
Vertical and Horizontal selection	Use Vertical and Horizontal question types to present options simply. Allow 'Other' details to be captured if none of the options apply.
Consent Forms	Capture consent through a Statement / Checkbox question type or a signature capture
Onboarding	For new staff, volunteers for your Not for Profit or customers – easily capture and retain new applicant data
Quizzes	Forms can also include scoring and right or wrong answers – so you can record understanding of something critical like fire evacuation training, or other safety or compliance activities.
Surveys	ProForm is a much simpler alternative to standalone survey tools, with the ability to create simple surveys and implement scales (such as the Likert Scale) to quantify responses.
Categories	Categories are a useful way of grouping similar forms together making it easy to find these. You can also assign a group of forms to a Form User – great if you want a form user to complete several forms

Export or Print	The Completed Forms page provides a great view of all the forms. This includes a replica of the completed form, which can be printed if required. You can also export the data to Excel.
Pictures	Include images and scale these to suit your design. We even support a 'Mark On Picture' question type – allowing users to mark up a picture – say of a car to indicate damage.

Within the form designer you can **customize items** like:

Access	How the form will be accessed (internally, via your form portal / website or QR code / link)
Design	Your brand's colours and your logo
Highlights	The main sections such as the title page and headings
Content	The form design itself

In many cases, a simple form is all you need to capture and store critical information. However, there are occasions when you need **more functionality** including:

Tabs	Tabs allow you to group your questions into sections – particularly useful for longer forms to allow the user to work through a form methodically or save and come back to the form later.
Tables	Tables allow you to capture the same data for multiple situations. For example, if you were collecting data on a person's assets and liabilities you might have questions on asset value, ownership percentage etc. You then need to repeat the same questions for a second asset and so on. Tables are a perfect way of implementing this.

Three **User Types** are supported depending on your use case:

Internal User	Someone who has an admin or community licence for your Salesforce org
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Form User	Someone who is allowed to access the forms you assign to them and then to save and edit forms via a Public Site - such as mortgage applications or employee induction forms. These Form Users do not require a Salesforce community licence to access your portal
Anonymous User	An Anonymous User is someone who scanned a QR code or clicked a link to complete a public form. They can add their name if this is included as a question

Form Portal / Public Site

ProForm also allows you to create and link your own form portal – providing several tools to support this.

ProForm can reference your web site / portal (“Public Site”) which you create and link to Salesforce in the conventional way.

The Public Site can become a form portal where you allow Form Users to login and complete the forms assigned to them. Form Users can save and exit forms and return to them later before submitting them. This is great if you have longer forms that require more detailed information.

Link forms to Objects

You can link a form to Standard or Custom Object. The completed form is then associated with this record, and accessible through the Completed Forms component in the object’s page view.

User Guide

We have a detailed user guide as well as a number of help videos – check our App Exchange listing or go to the Home tab within ProForm itself.

Feedback

We always welcome your feedback. Let us know if there are any other features in ProForm you’d like to see by emailing us at: hello@app-lab.com.au and we’ll come back to you quickly.