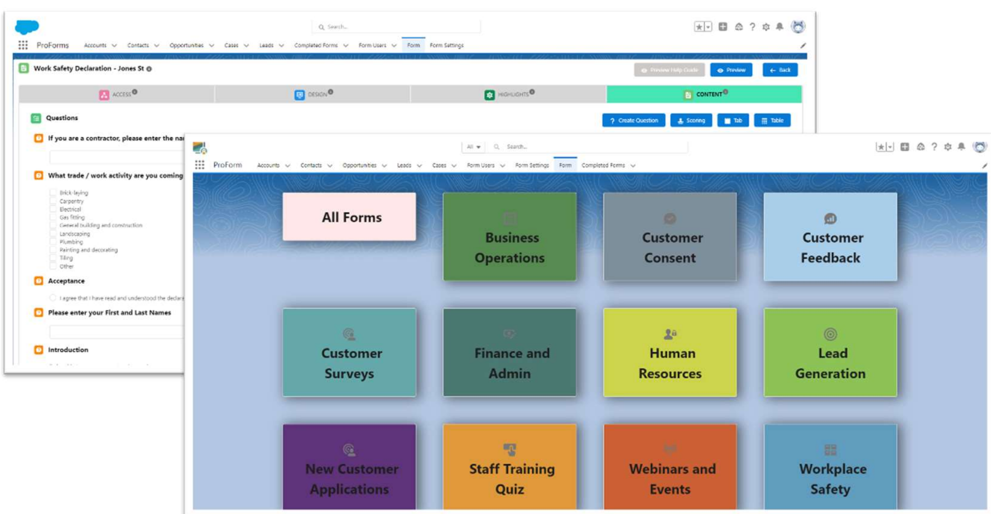
ProForm

Easy digital forms for Salesforce



March 2022

VERSION: 1.0

APP LAB | 2 /244 Palmer St, Darlinghurst, NSW 2010 Australia

Contents

1. 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

At App Lab we've been using ProForm for more than a year, within our line of business apps in financial services, insurance and retail – so we use the product every day within our business.

Before we get into creating forms, we've provided a short section on Use Cases to identify applications where you can use ProForm and the capabilities to expect within the forms and the workflow.

To keep things simple we refer to the person filling in a form as a "User" in this guide.

2. Use Cases

ProForm is designed where you want to capture data from customers and keep this record within your Salesforce org.

You *don't* 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. You can also capture consent and agreement, including e-signatures, declarations and acceptances.

You can email links to potential respondents or simply print and display a QR code.

ProForm is mobile responsive, and form users are presented with a beautiful user experience on all their devices.

If the use case demands it, 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.

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.

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

3. Creating Forms

For most applications the form design has largely been done as the forms exist on paper or on your website.

If the form doesn't exist, creating this on paper or a whiteboard is a great way to capture ideas and test them out. It's a great idea to commit these ideas to ProForm, once the design has been paper-prototyped with a few of the folks who are going to use it.

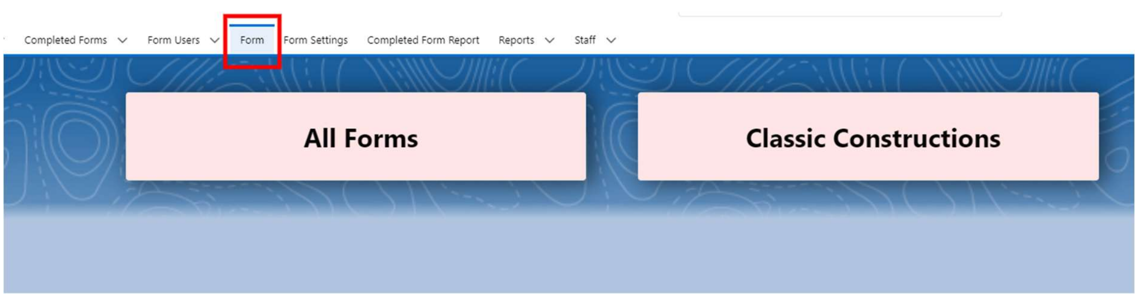
Let's take an example for a company we'll call Classic Constructions. As a builder of quality projects, Classic is legally responsible for worker health and safety across all their sites.

On a daily basis, Classic checks each worker who attends one of their building sites, to remind them of key safety requirements and confirm their understanding and consent.

Angela De Silva is a carpenter for Classic and is working on a building site in Jones St. She goes to the site entrance and scans the QR code and completes a simple form. The form includes information on the safety procedures on site and the policies she's agreeing to abide by when she completes the form. Angela enters her name and confirms the purpose of her visit from the drop-down menu, and signs and acknowledges the declaration. She's now ready to start work.

Let's design this simple form in ProForm.

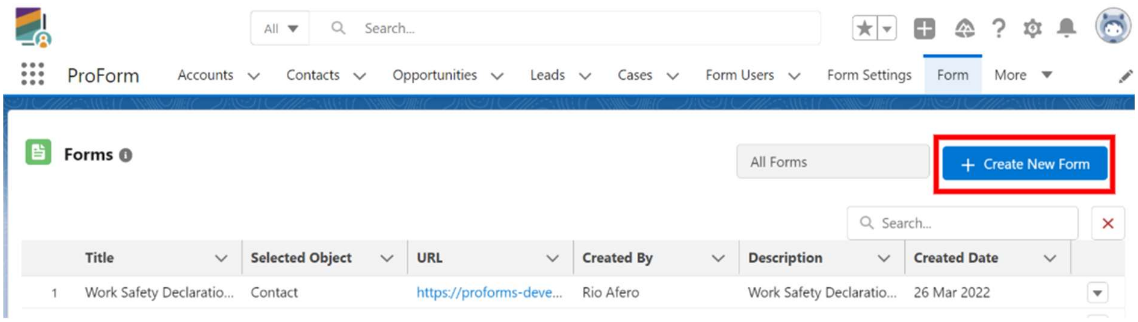
Open the ProForm app within your org and go to the **Form** page from the main menu.



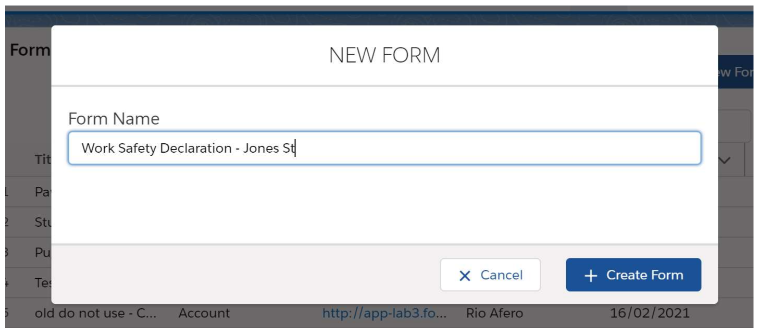
Forms are arranged in Categories (like folders) including one called 'All Forms' which is the default Category.

We'll get to Categories a little later, but for now select **All Forms**.

A list of your current forms is presented. In this case we're creating the 'Jones St Work Safety Declaration' – so we select **Create New Form**.



We give our form a name: ‘Work Safety Declaration - Jones St’ and select **Create Form**.

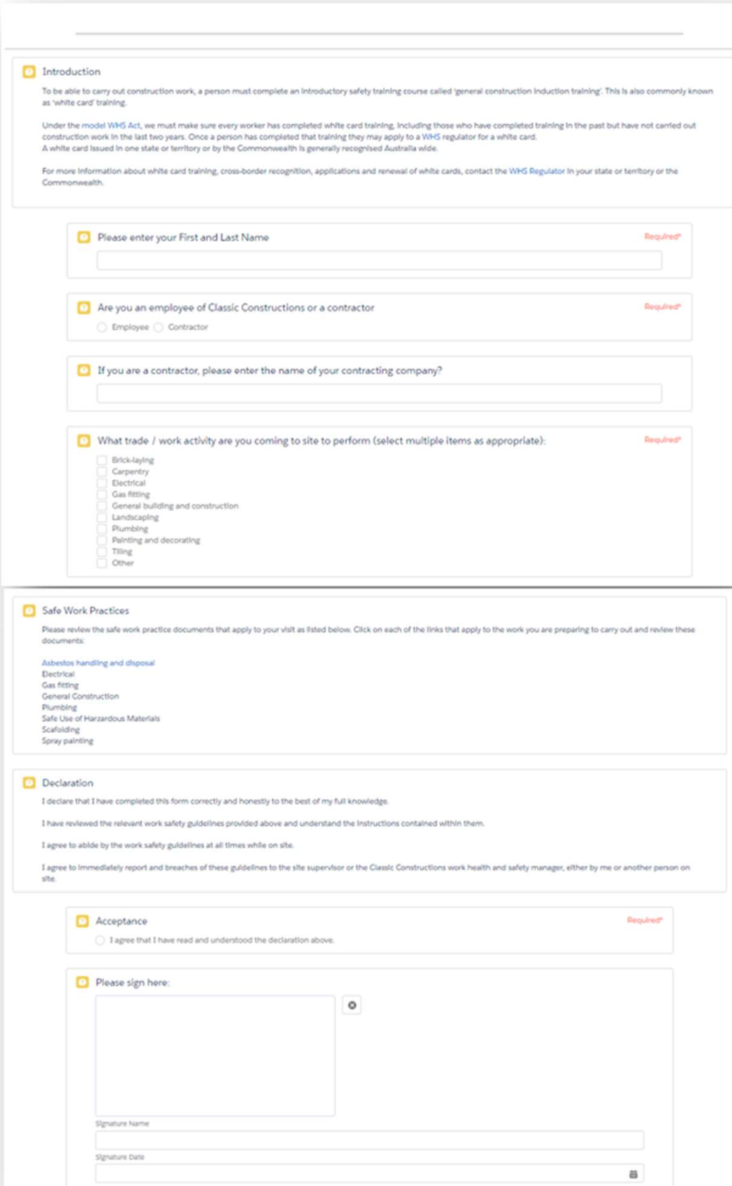


The form design screen has 4 tabs:

Access	How the form will be accessed (internally, via your form portal / website or QR code / link)
Design	the main colours, your logo and “questions per page”
Highlights	the main sections such as the title page and headings
Content	the form design itself

Let’s dive in and start designing the form and select the Content tab.

3.1 Content Tab


Introduction

To be able to carry out construction work, a person must complete an introductory safety training course called 'general construction induction training'. This is also commonly known as 'white card' training.

Under the model WHS Act, we must make sure every worker has completed white card training, including those who have completed training in the past but have not carried out construction work in the last two years. Once a person has completed that training they may apply to a WHS regulator for a white card.
A white card issued in one state or territory or by the Commonwealth is generally recognised Australia wide.

For more information about white card training, cross-border recognition, applications and renewal of white cards, contact the WHS Regulator in your state or territory or the Commonwealth.

Please enter your First and Last Name Required*

Are you an employee of Classic Constructions or a contractor Required*

Employee Contractor

If you are a contractor, please enter the name of your contracting company?

What trade / work activity are you coming to site to perform (select multiple items as appropriate): Required*

- Brick-laying
- Carpentry
- Electrical
- Gas fitting
- General building and construction
- Landscaping
- Plumbing
- Painting and decorating
- Tiling
- Other

Safe Work Practices

Please review the safe work practice documents that apply to your visit as listed below. Click on each of the links that apply to the work you are preparing to carry out and review these documents:

Asbestos handling and disposal
Electrical
Gas fitting
General Construction
Plumbing
Safe Use of Harzardous Materials
Scafolding
Spray painting

Declaration

I declare that I have completed this form correctly and honestly to the best of my full knowledge.

I have reviewed the relevant work safety guidelines provided above and understand the instructions contained within them.

I agree to abide by the work safety guidelines at all times while on site.

I agree to immediately report and breaches of these guidelines to the site supervisor or the Classic Constructions work health and safety manager, either by me or another person on site.

Acceptance Required*

I agree that I have read and understood the declaration above.

Please sign here:

Signature Name

Signature Date

Classic Constructions uses a form like the one of the left for their contractors and staff to complete when they go on site.

However, many people visiting forget to do this and the forms get lost or damaged on site.

Having incomplete work health and safety records is not something Classic's board of directors is happy with. Hence the move to ProForm.

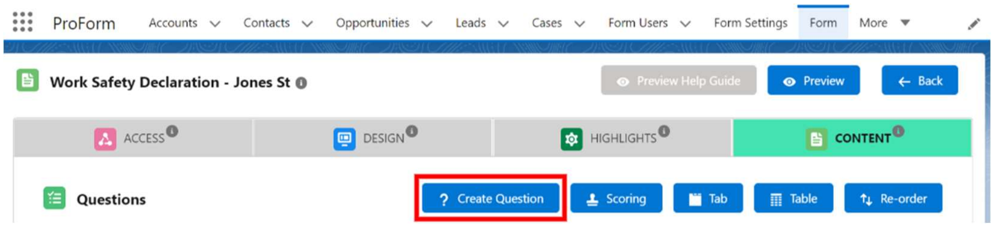
To start with the form has a header section that has the logo and some general information for the form filler to read and acknowledge.

Next there are a series of simple boxes to record key information followed by a tick box for the different trade or profession and the visit purpose.

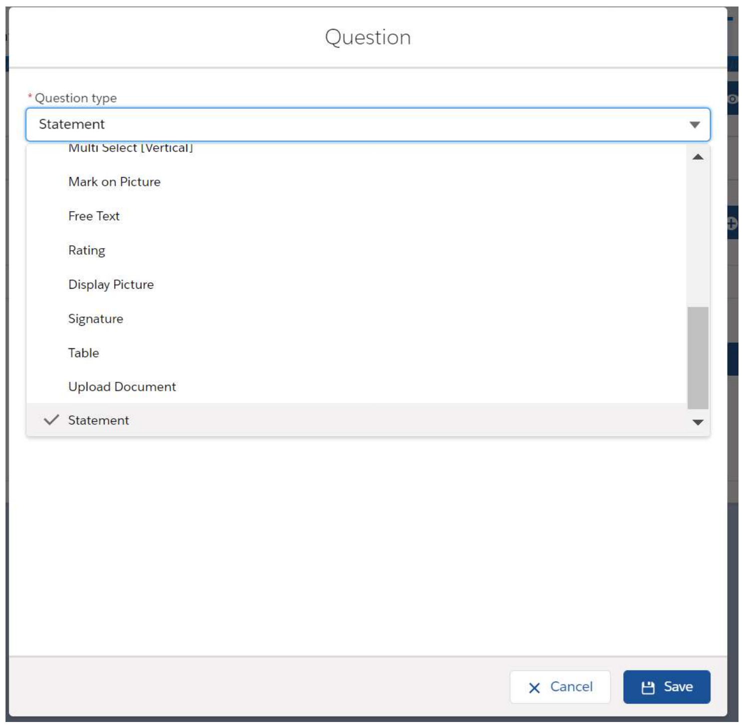
Finally there is reference to various policies and how to access them, followed by a declaration section with a signature.

Let's build this form now.

To create a new question (or even a section of the form that just contains information) select **Create Question**.



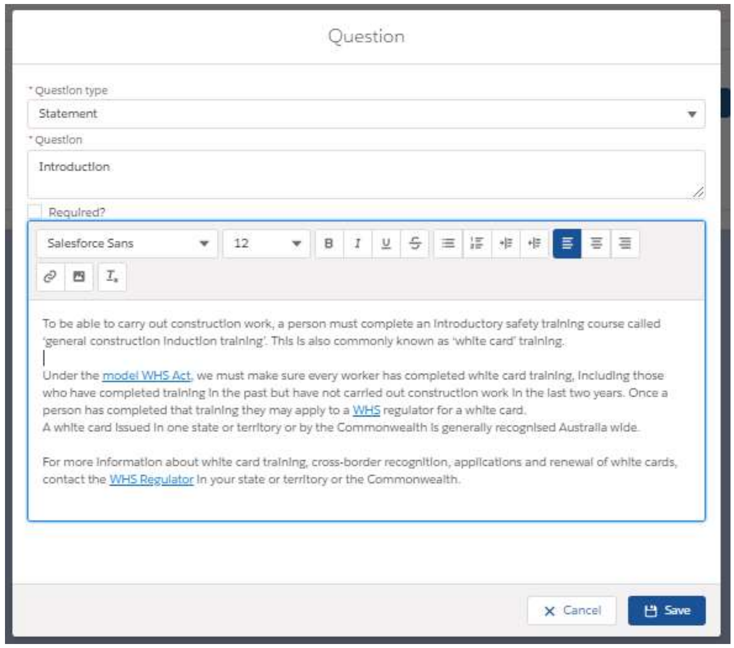
A list of question types is presented. For now we want to provide the same introduction on the paper form, within ProForm. So, we'll select a **Statement** question type.



Next we fill in the Question – which in our example isn't really a question – it's the heading for the first part of the form: "Introduction"

Below the question field is the statement body text itself. If you have a PDF or word document you can simply copy and paste the text in here. We do have a PDF so we copy and paste the introduction text – word-for-word.

Note that you can embed links into your text and there are a range of simple formatting and styling you can apply to your text.



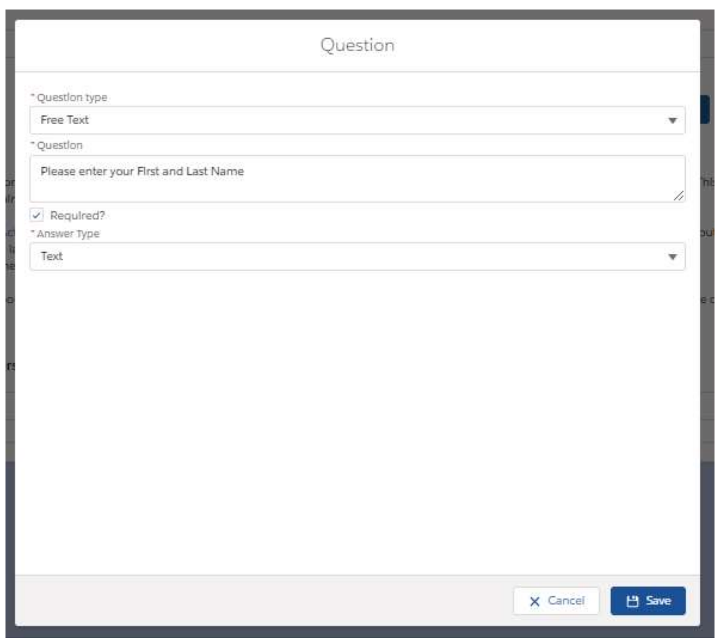
Now we add a simple question to collect the person's name.

Select **Create Question** and this time select the 'Free Text' question type.

Hint: Move your cursor to the Question Type dropdown and type the first few letters of the question type and click to select the desired type - this is great for fast question creation.

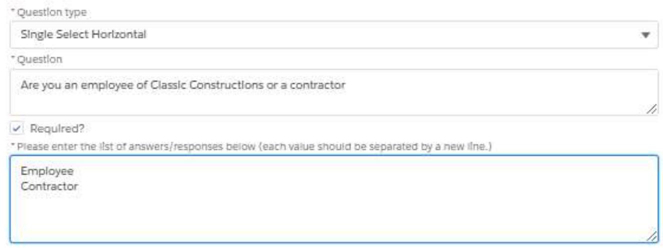
Enter your Question text and select whether this is 'Required' or not.

Select your Answer Type from the dropdown list and click **Save**.



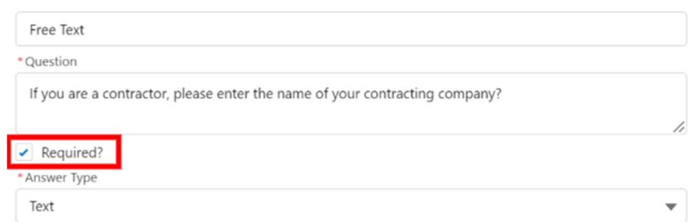
Now we want to know a bit more about whether the visitor is an employee or a contractor – so we'll use a Single Select Horizontal question to ask this.

Type in the question text and the options available for the person to choose from.



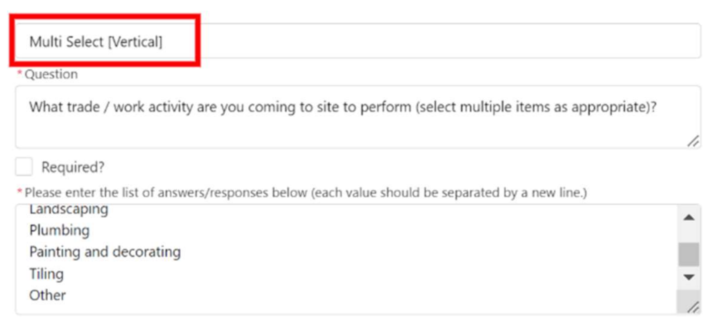
Now if the person attending site is a Contractor – we'd like to record the name of the contracting company, so we create a free text question.

Note that we don't tick the 'Required' checkbox as an employee won't need to complete this question.



Now we need to understand the type of work the visitor is employed to do.

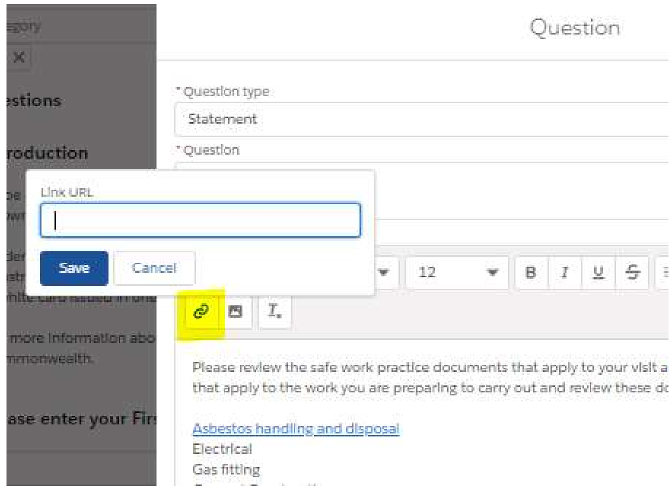
We can use a Multi Select [Vertical] question type here as it might be that they are coming to site to perform more than one of these tasks.



To ensure visitors are familiar with the safety guidelines relevant to this site, we can create a Statement question and include a list of guidelines – each one linked to either an external site or a file uploaded to your Salesforce org.

Highlight the text item for the link and then select the link button; add the link and press **Save**.

Add as many links as you need to and press **Save** to save the Statement

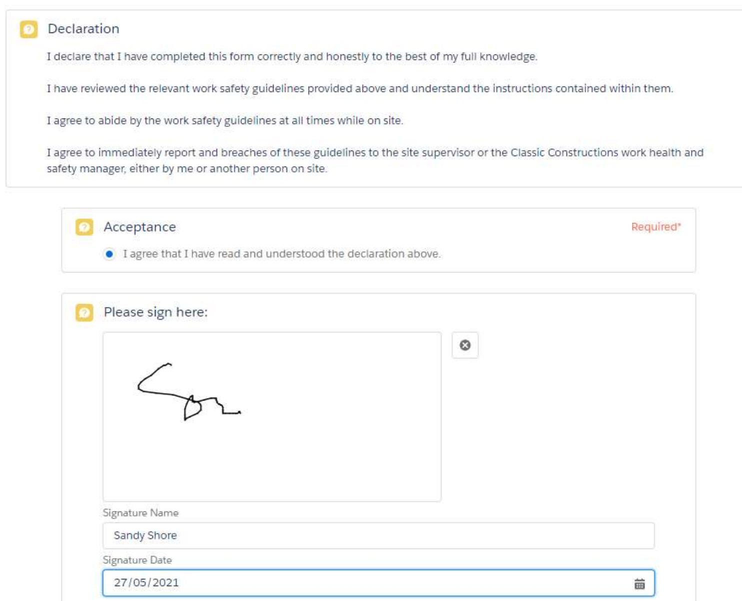


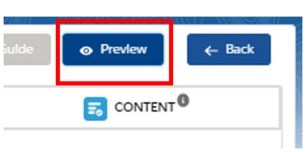
Finally, we need to capture the declaration and a signature.

We insert:

- A Statement containing the declaration wording;
- A Single Select Horizontal for the visitor to indicate their acceptance;
- And finally a Signature question type to record.

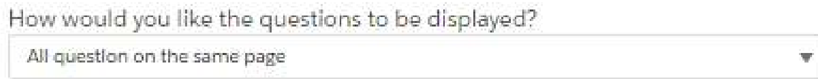
When we preview the form – we see the last section of the contains the elements in this picture.



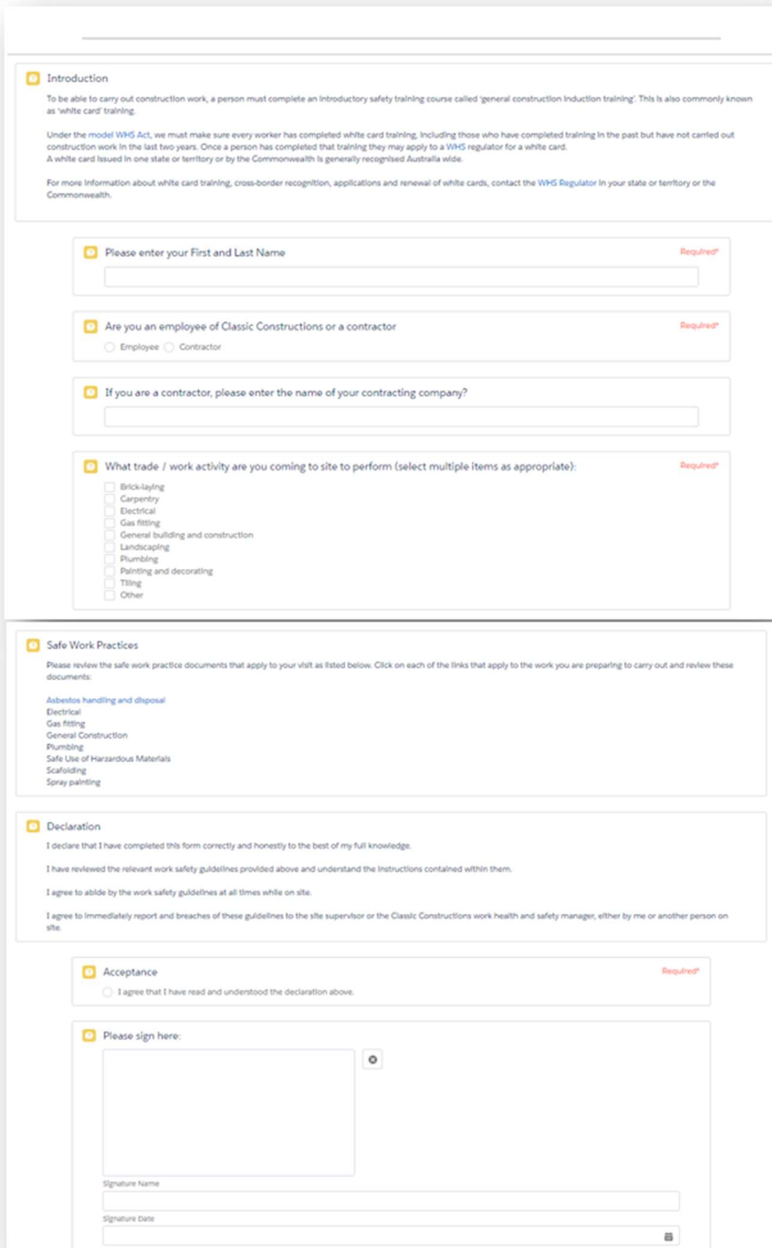


To preview a Form without leaving the form designer, just select **Preview** from the top right corner of the screen.

You can present a form, one question at-a-time, or all-at-once by going to the Design tab and selecting the desired option:



So now we've created a form to capture and record an understanding of safety guidelines at a site. Here's what the form looks like:



Introduction

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I agree to immediately report and breaches of these guidelines to the site supervisor or the Classic Constructions work health and safety manager, either by me or another person on site.

Acceptance Required*
I agree that I have read and understood the declaration above.

Please sign here:

Signature Name

Signature Date

Now we can add a heading, a logo and a few things to spruce it up a bit more. To do this we go to the Highlights Tab.

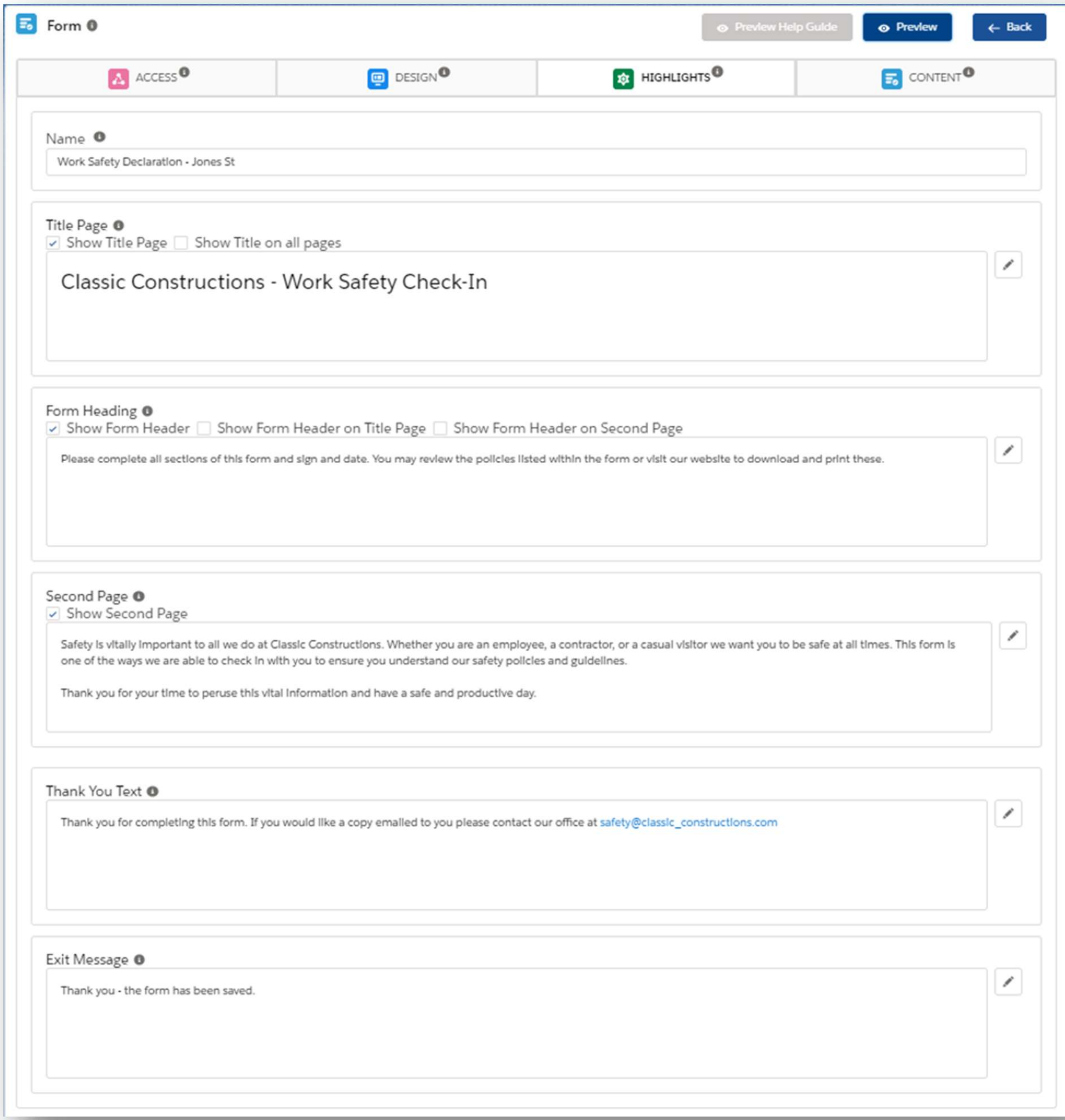
3.2 Highlights Tab

On the Highlights tab, form creators can configure and change several items:

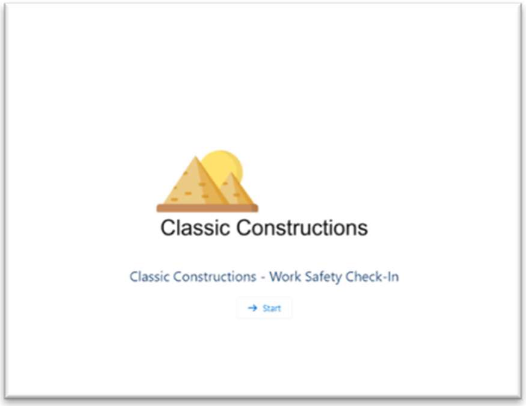
Form Name	This is the name of the form used within Salesforce – feel free to name this as suits you and your business
Add a description	This is for internal use within the ProForm app and helps identify a form when displayed in lists or views.
Title Page	Is the first page a user sees when they access the form. Your logo will be included here too if you've uploaded it (see the Design tab below for more details).
Second Page	As the name suggests is the second page to load after the Title Page. Use this perhaps for some brief general messages including thanking users for taking time to complete the form. Again, if you've uploaded a logo it will be displayed here.
Form Header	Is an area of the form that displays on each page of questions. This is useful for including brief instructions – such as to complete all sections of the form or other general information. If you want detailed instructions (hopefully you won't need them) you can upload a user guide as a PDF. You have options to control where the Form Header is displayed including the Title Page and Second Page – giving you lots of flexibility.
Thank You Text	For a brief thank you message when a form has been completed.
Exit Message	If you exit the form prior to completion you can display a custom message to the user.

There are edit and save buttons for each of the above sections as well as formatting controls.

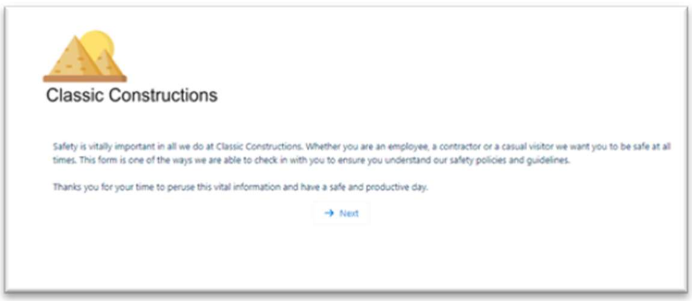
Here’s how we completed our Highlights section:



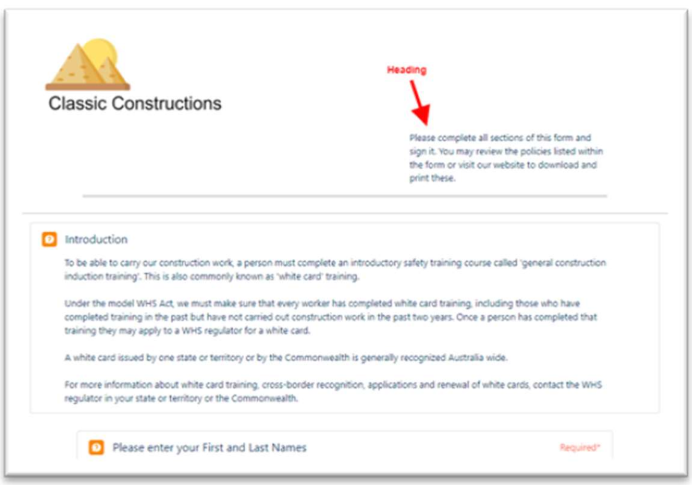
And here are how the above settings are presented when the form is viewed:



Title page



Second page



Question page – with Header

3.3. Extending Form Functionality – Tabs and Tables

In many cases, a simple form is all you need to capture and store critical information – like in the example above. 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 perhaps 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.

Let's look at Tabs and Tables in detail.

3.4 Tabs

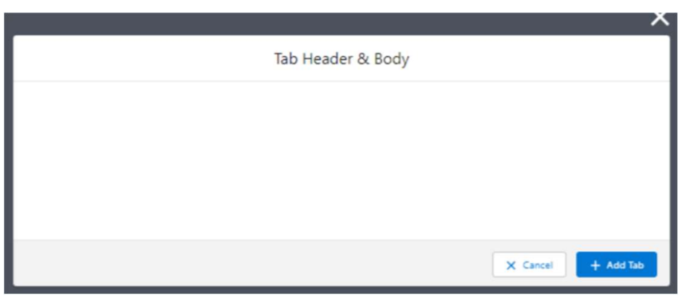
To group sets of questions in tabs we need to first define the questions themselves and then assign them to Tabs.

Let's look at the form we created above. Logically, the form has 3 sections:

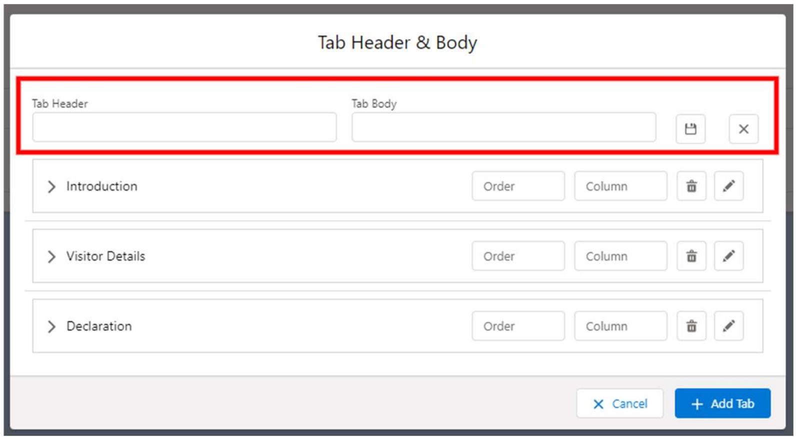
- An introduction that covers the policies and procedures;
- Site visitor details;
- A declaration.

We input all the questions in the form designer as shown above and then we're ready to group these into Tabs (or sections)

Click the **Tab** button from the main menu and select **Add Tab**.



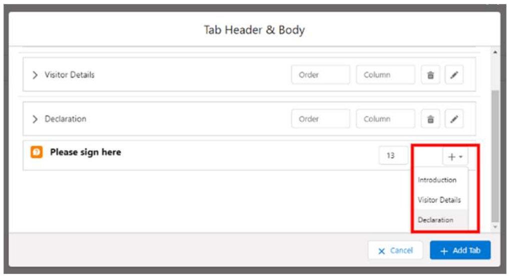
This brings up a section where you can add the Tab Name and a brief description (which is displayed to the user).



Press the **Save** icon to save the new Tab.

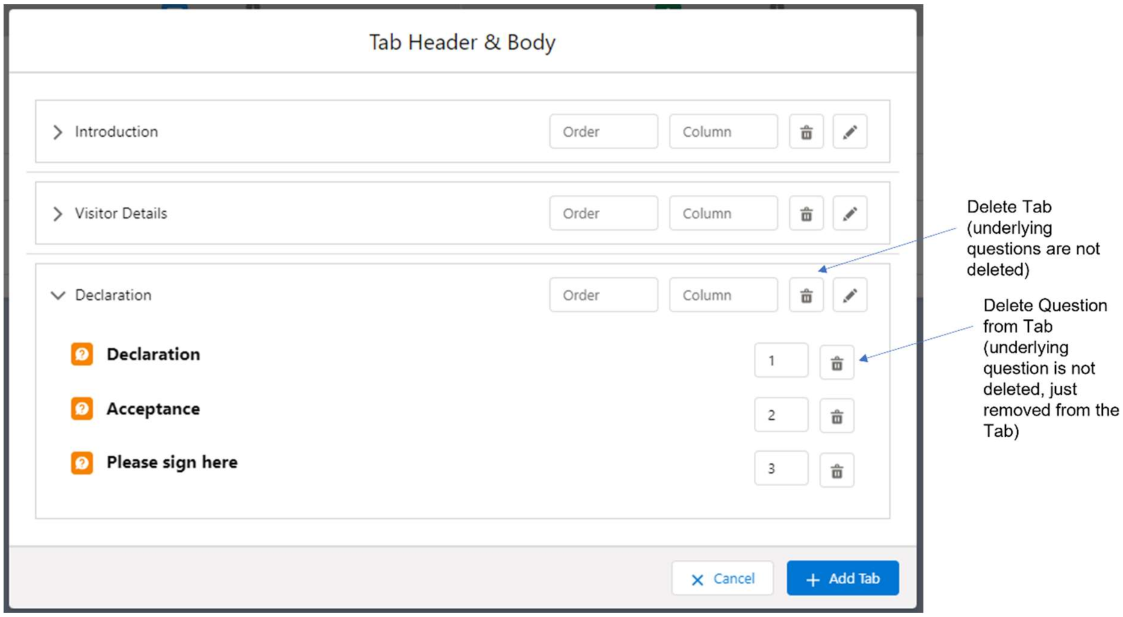
You can control the order the Tabs are displayed and which column (if you'd like multiple columns). ProForm will automatically order / number the Tabs for you in the order you create these – but it is simple to re-arrange by changing the value in the Order field.

Now let's add a question to the 'Declaration' tab. To do this, click the **+** icon next to the question you want to add. In this case we want to add the 'Please sign here' question, we click + and select 'Declaration' from the list:



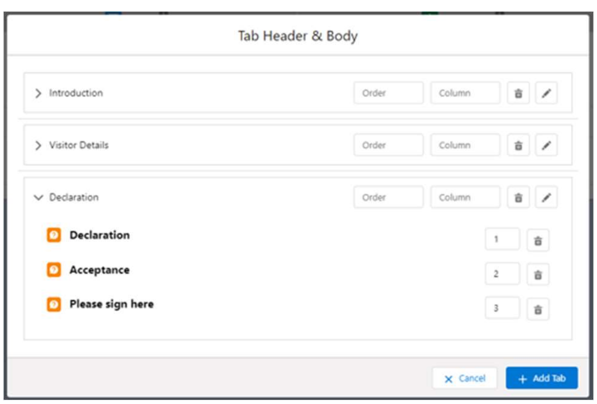
Once you've selected a question and placed it in a Tab – the question is removed from the list of available questions.

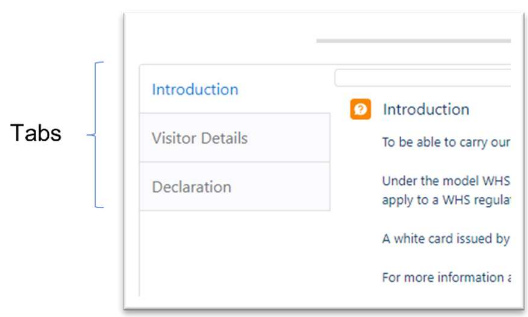
Clicking the **>** symbol next to a tab will expand it to show the questions currently under this Tab. You can delete a Tab or just delete a question within it. When you delete a question – this just removes it from the Tab but doesn't delete the question itself!



We repeat this for all the questions. Adding them to the desired Tab.

Once you've finished, the form should look like this:





Tab design view

Form Preview

To see Tabs when previewing / completing the form you need to ensure the 'All questions on the same page' option is selected (Design tab). If you select 'One question per page', then you won't see the Tabs displayed.

When you return to the main Content screen the questions are nested under the sections they are grouped under – so you can still edit these and / or delete them.

3.5 Tables

Tables are great if there are a group of questions you want to group and then repeat.

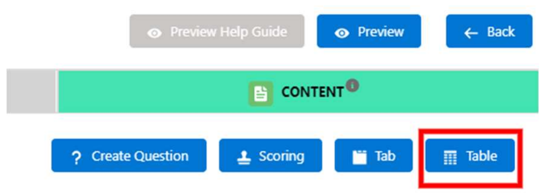
In the Work Safety form, Classic Constructions want to understand the existing certifications and qualifications their employees already have and when they completed them. This will help assess training needs before staff go to site and start work. On the current paper form, the information is listed as:

Course or Qualification	Accredited Training Organization	Date of Accreditation

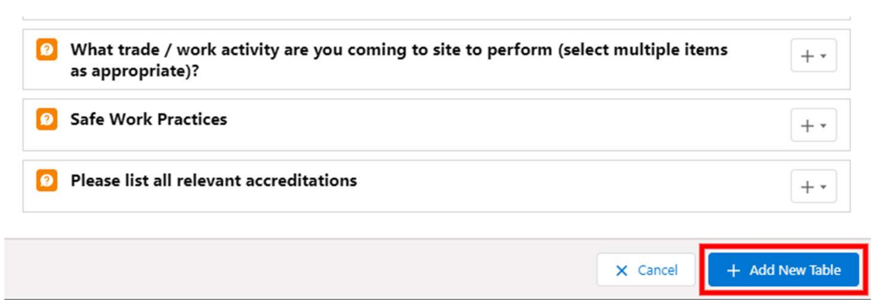
In a similar approach to how we created Tabs; to create the Table we need to create the individual questions first.

With the 'Date of Accreditation' question we make this a Free Text question with a date response type – this way we only get a date in this field.

Once the individual questions are created, click the Table button in the Content designer screen.



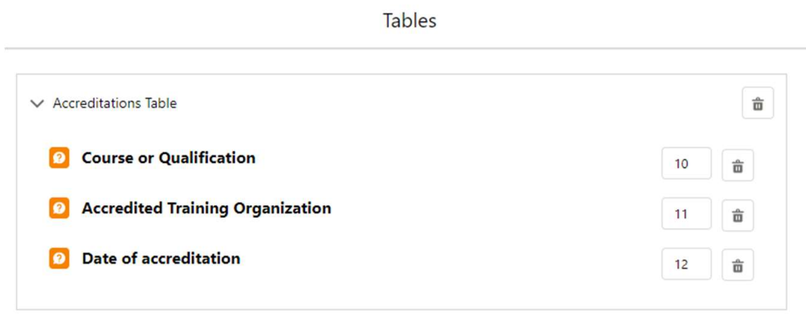
Now select 'Add New Table'.



Add the table name and click **Save**. We find it's very helpful to give this a descriptive name like 'Accreditations Table' rather than 'Table 1'.

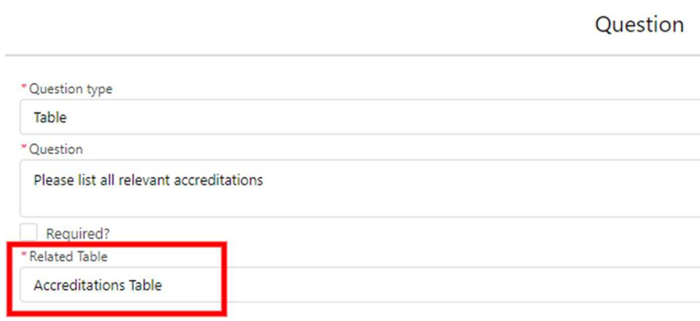
We can now select questions to include in the table, by clicking the **+** icon next to the question.

Once we've added the Table the screen provides a summary (click on the **>** arrow to expand the table and show the underlying questions)



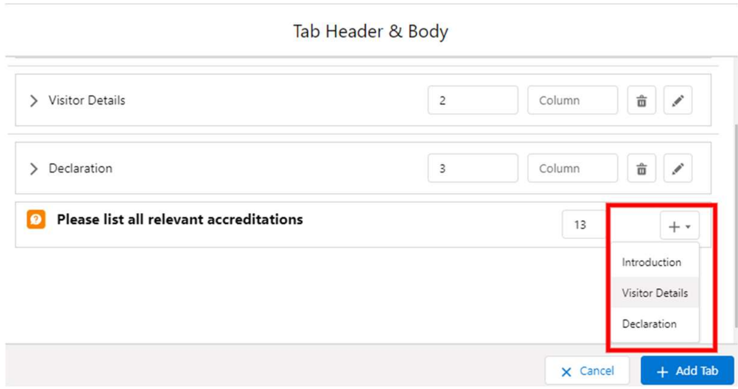
Before the table is complete, there is one more step – adding a special 'table question' to the form.

Go back to the Content design screen and add a question. This time in the Question Type, select **Table**. Give the table a heading in the Question field, then select the 'Related Table' and add the table created above. Press **Save**.

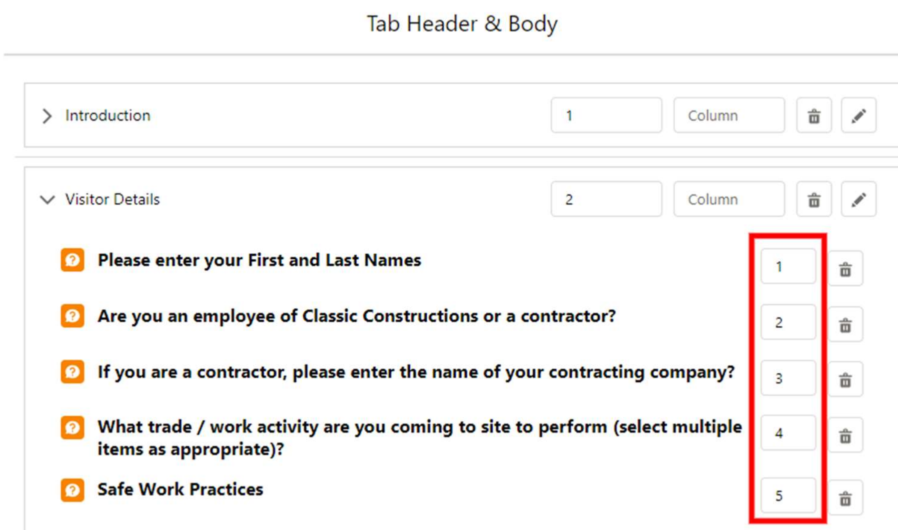


Now, let's add this table to the Employee Details Tab.

- Go to the Tabs section (Tabs button);
- Select the **+** button next to the "Please list all … Accreditations" question and add this to the Employee Details tab

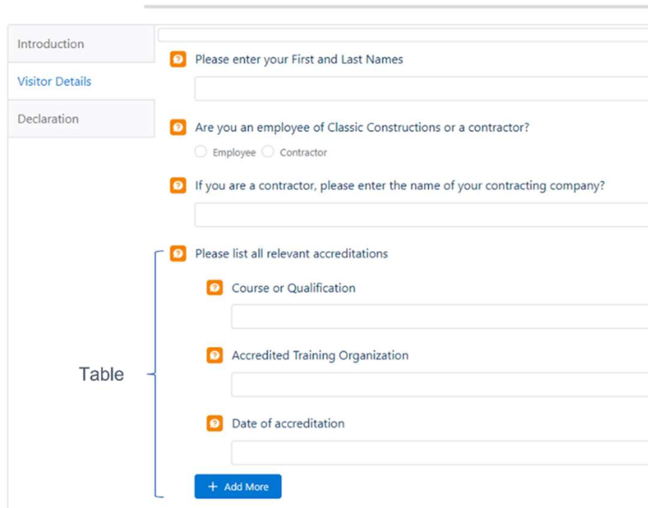


*You can re-order the questions by changing the value in the Order box next to the question. When finished just click the **X** for this pop up (your changes are automatically saved).*



You can position the tab to appear at certain sections of the page by changing the value in the Column box (next to the order box). This will position the tab towards the right of the screen depending on the value entered. The values are relative to each other in determining the position – relative to the other columns.

Now let's preview the form and see the results of our efforts so far:



Under the 'Accreditation' Table question we have an 'Add More' button – allowing the user to add multiple entries in this section.

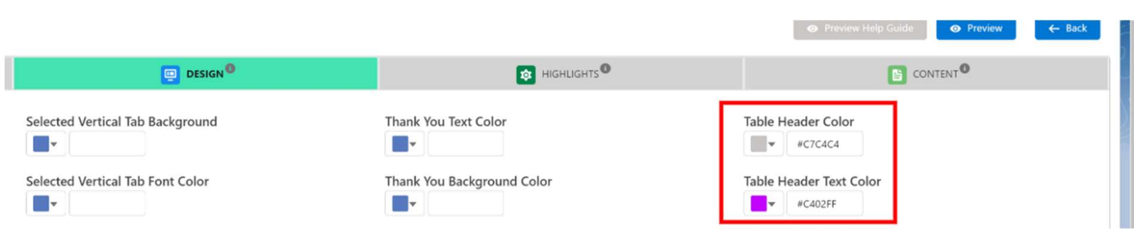
The date question has a date icon in the far right of the answer box – as we formatted this question as a date.

As data is entered in the table, it is summarized above the table questions.

Please list all relevant accreditations

Course or Qualification	Accredited Training Organization	Date of accreditation	Action
Scaffolding Safety	TAFE NSW	2021-03-17	Edit
Workplace safety	WorkSafe	2022-01-03	Edit

You can change the colours associated with the table in the Design tab. In this example we've selected the table header colour as grey an picked purple for the Table Header Text.



Congratulations, as you can now create most of the forms you are likely to need. We've got some advanced topics later in this guide, but for now it's time to add your stylistic touches to your form!

3.6 Surveys, Quizzes and Scoring

This is a great part of ProForm where you can build:

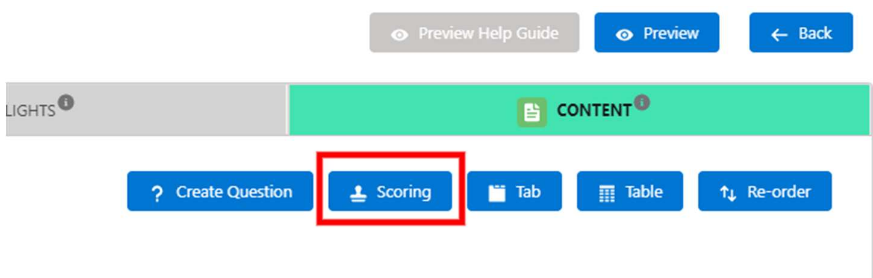
- A survey - to quantify customer feedback on a new product or website
- A quiz – to confirm understanding of training or assess competency
- A rating or score – to allow you to rate a new customer in terms of suitability as a lead

There are lots of options and where you can use ProForm to provide some quantifiable output of the response.

To create a quiz for example you need to do the following:

- Create a new form and give it a suitable name (and maybe assign it a Category like “staff quizzes”)
- Create the quiz questions – there are two question types you can use to score the responses:
  - ❖ Single Select [Vertical with Scoring]
  - ❖ Single Select [Horizontal with Scoring]
- Assign a score for each response:
  - ❖ This can either be a score for a correct response – say 1, and 0 for the other incorrect responses,
  - ❖ or a scale from 0 to 10
  - ❖ or whatever you chose
- Add any other non-scoring questions – such as capturing name and other details
- Assign the scoring ranges and the associated feedback

This last step is done by selecting the Scoring button at the top of the question display in the Content tab

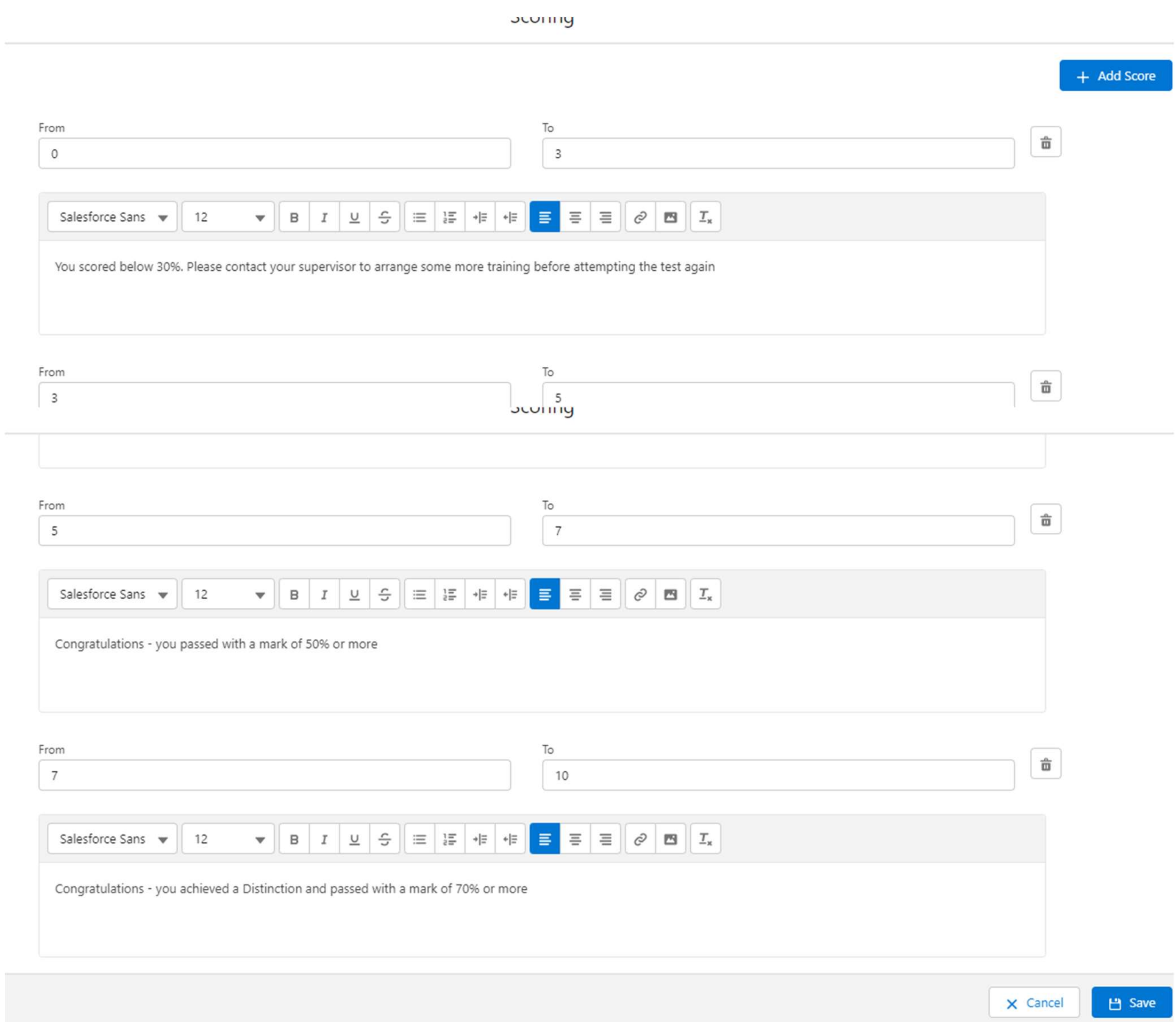


This allows you to set scoring ranges to allow you to evaluate the responses and display feedback to the user. This is optional.

For example in a quiz you may want to display the result to the user as soon as they hit Submit. But for a survey you probably want to hide this data from the form respondent – as you want to ensure their feedback is not biased by trying to give you answers that score well.

ProForm allows you to set up any scoring ranges you like – providing each value is an integer (1, 2 etc but not 2.5).

This image shows a scoring system for 10 questions (each worth 1 for a correct answer and 0 for an incorrect one). The pass mark is 50% and 70% gets a distinction.



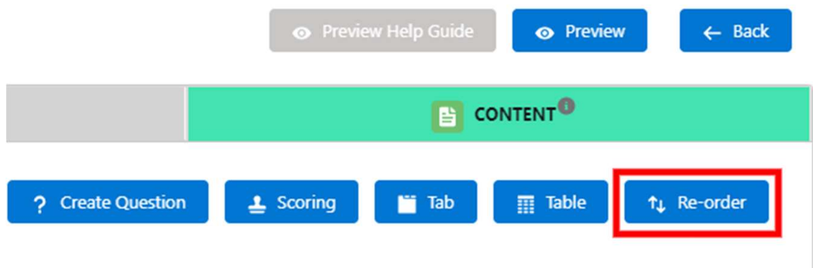
The score is saved as part of the Completed Form record and the results for each question, together with the total score can be exported to Excel (see Section 6 – Completed Forms for more details).

3.7 Reordering questions

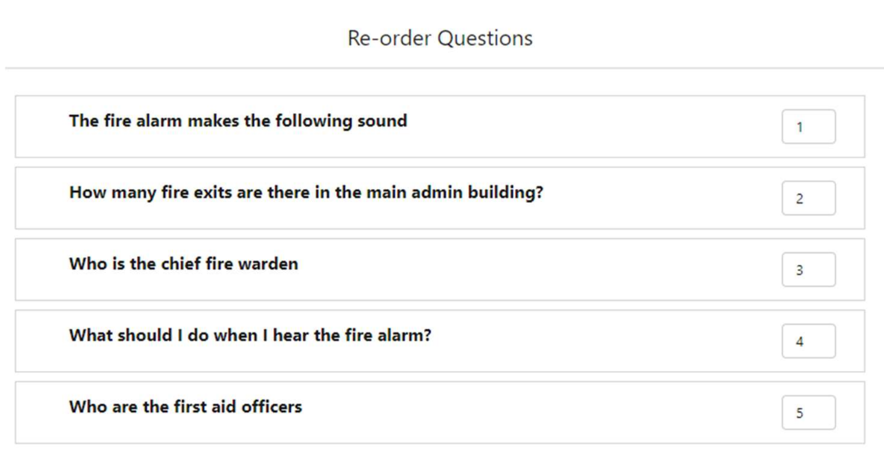
It is quite likely that at some point you will need to insert a question somewhere in the middle of you form.

If you're using tabs, then this question can be inserted into the tab at any point – just use the order field within the Tab to change the order.

If you want to change the order of questions in the main body of the form – you select the reorder button in the top left of the Content Tab:



This pulls up a list of all the questions and an order box for each.

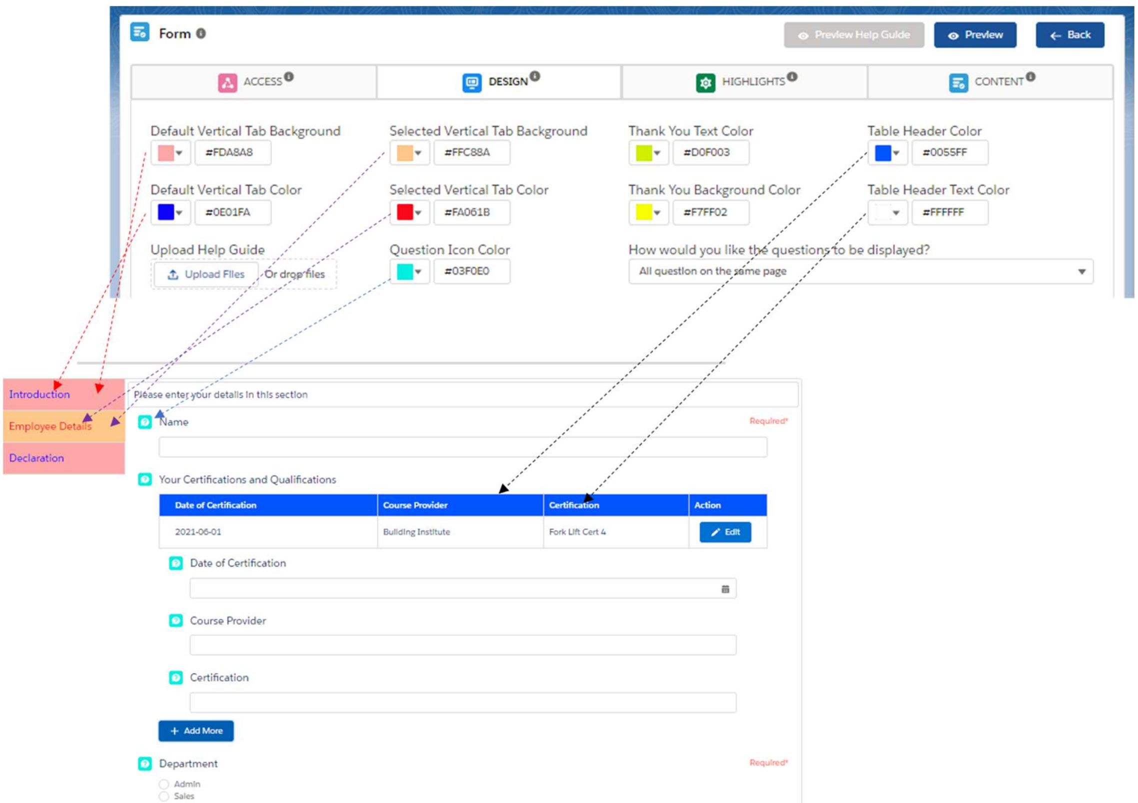


ProForm assigns a default question order to each question in the order they are entered, you can change this order and type any value to indicate a questions position in the form.

3.8 Design Tab

In the Design tab we can configure a variety of colours for the different design elements in ProForm as well uploading a logo and a help guide for users (for complex forms with lots of detail).

Here's an updated version of the form we've just created with all the colour elements selected to show you what you can customise:



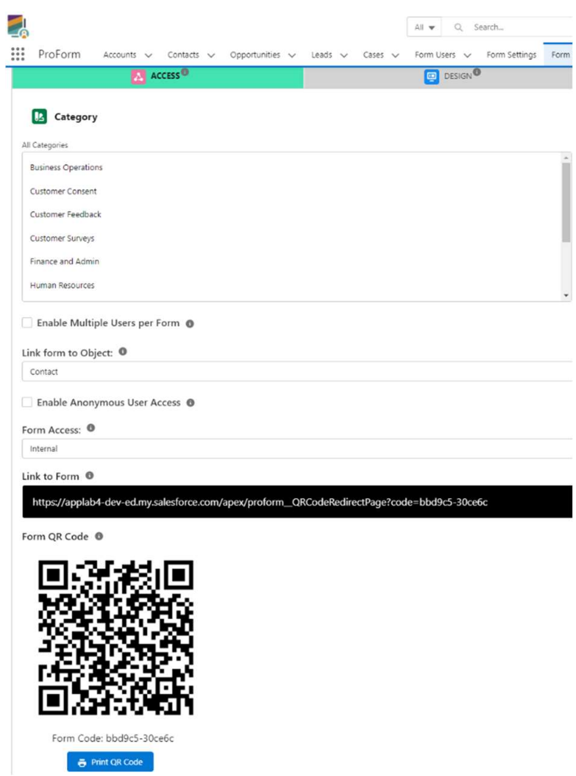
The design elements you can configure include:

Default Vertical Tab Background Default Vertical Tab Colour	If you're using Tabs in your form, then you can select the background colour and the text colour – for the tabs that are not selected.
Selected Vertical Tab Background Selected Vertical Tab Colour	These parameters control the background / text colour for the selected tab
Question Icon Colour	Sets the colour associated with the question icon. All icons will be set to this colour.
Thank You Background Colour Thank You Text Colour	Controls for the Thank you text and background colours (not shown in the example above)
Table Header Colour Table Header Text Colour	If you're using Tables, then you can select the Table Header background and text colour. Table Headers appear in the form response when more than 1 entry is made by the user.

3.9 Access Tab

This section (together with the Form Settings menu option) let's you control:

- Assigning Categories to your forms;
- How your forms are accessed by users; and
- Linking the completed form to an existing object.



Let’s look at some use cases to explain these options:

Use Case	Explanation	Options
Simple / single form	Where users are only filling in one form and the form itself takes a few minutes to complete. You don’t need the user to be able to save and edit later	Link to Form (URL) – email or SMS to your form fillers or link to this URL from your website QR code – for easy form access for mobile users
Multiple forms	Where users are filling in more than one form and go to your website form portal, login and see the forms they need to complete. Users can save and edit	Create Form Users and create (and link) your form web portal within Salesforce
Complex / longer forms	If the form is detailed and may require the user to go and find additional information (such as insurance history for example) then use of a form portal is recommended	Create, Form Users and create (and link) your form web portal within Salesforce

Before we explore the options on the Access page, we’ll take a closer look at some related concepts first.

3.9.1 Categories

Categories are a useful way of grouping similar forms together – for example Classic Constructions could group all their work safety forms under a category called “Work Safety”, making it easy to find these.

Grouping forms within the Forms tab also makes it much easier to find the form you’re looking to edit, clone or delete.

You can also assign a group of forms to a Form User – great if you want a form user to complete say all your Work Safety forms – rather than having to assign these one-by-one you can assign them as a group or Category (you do the assignation within the Form User page).

The Form Settings page can also customize Categories and assign them logos and colours (see section 4 below).

3.9.2 User Types

Internal User	Someone who has an admin or community licence for your Salesforce org
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

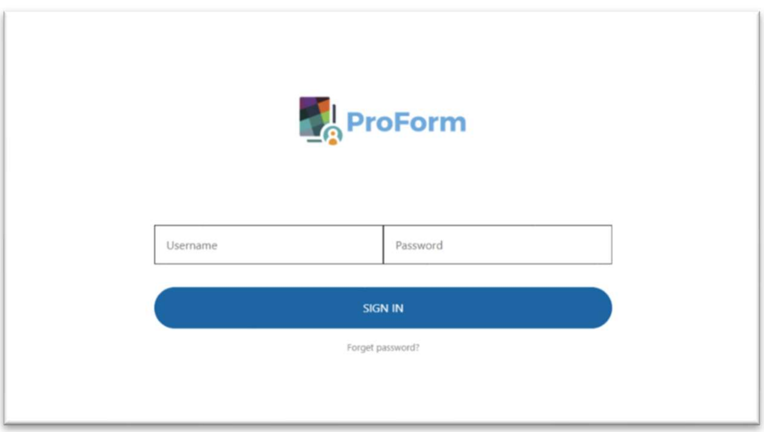
3.9.3 Public Site

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

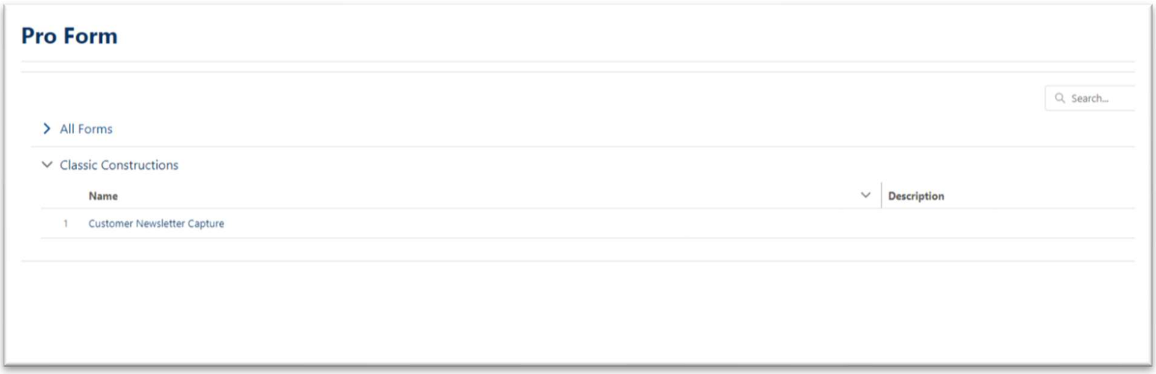
The Public Site can become a form portal where you allow Form Users to login and complete the forms assigned to them. Form Users can save and exit forms and return to them later before submitting / completing them. This is great if you have longer forms that require more detailed information.

Refer to section 4 on Form Settings to see how to reference your Public Site so that ProForm is aware of it.

We set up a very simple form portal in our version of ProForm and it requires a login (to authenticate a Form User – using the credentials within a Form User record).



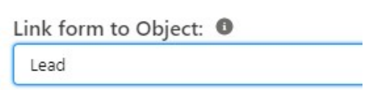
The Form User then sees a list of forms (we've grouped ours using an Accordion component).

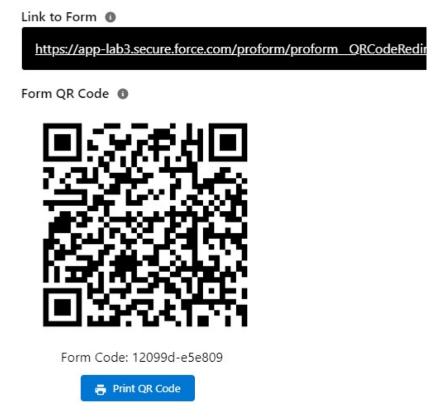


Note: the URL you provide for your Public Site is also used to create the links and QR codes to your public forms.

3.9.4 Form Access options

There are several options presented to allow you to control how the forms are accessed.

Enable Multiple Users per Form: Allows multiple guest users to complete parts of same form, For example, say you have a home loan application that requires the borrower to complete part of the form and their accountant fills in another section. Contact App Lab first if you wish to use this feature.	
Link Form to Object: Allows you to 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. Custom Objects are selected in the Form Settings page.	
Enable Anonymous User Access This option allows Anonymous users to access your public forms. The 'Form Access' option must be set to 'Public Site' for this to function correctly.	

Form Access Controls whether the form is being accessed by Internal Salesforce users or via a Public Site (either Form Users or anonymous users) This setting impacts the URL and QR code created in the section below.	
Link to Form and QR code options are presented here reflecting whether the Form Access is for internal or public users.	

4. Form Settings

There are several useful controls and tools within the Form Settings page including:

<table>
<tr>
<td>

Custom Objects – for Form link

</td>
<td>

This section allows you to include the custom objects in your org, which you then use to “associate” a completed form to an object record.

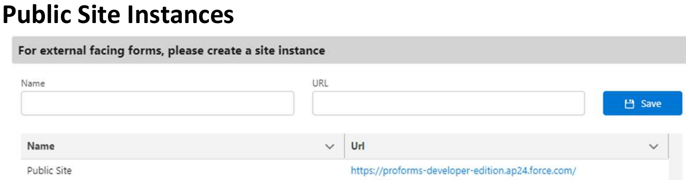
For example, Classic Constructions has a custom object called Staff (to describe employees and contractors within their workforce). Classic develops a staff onboarding form to capture important information and wants to link completed onboarding forms with a Staff record.

To do this select “Staff” in the “Available” list and click ▶, to add this to the “Selected” list.

Next you create the onboarding form and link this to the Staff object (Forms page -> Access tab)

</td>
</tr>
<tr>
<td>

Public Site Instances



</td>
<td>

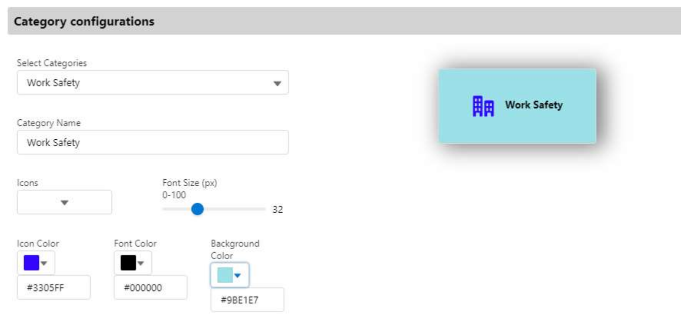
In this section, you reference the public site you want to use for your form users to log into and compete forms. Typically, if users are filling one form in – it is probably easier to send a link to them via email or publish the QR code. However if you have several forms – this is the place where you tell ProForm about your form portal.

In the image opposite you can see the site we created to test this functionality within ProForm.

</td>
</tr>
</table>

<table>
<tr>
<td>

Category Configurations



</td>
<td>

Category Configurations allows you to configure your categories.

In our example we select "Work Safety" from the Select Categories dropdown and can configure elements like:

- the font colour;
- the background colour;
- whether to use an icon or not (icons are from the Salesforce library);
- the icon colour; and,
- the text font size

You can also edit the category name as well here.

</td>
</tr>
</table>

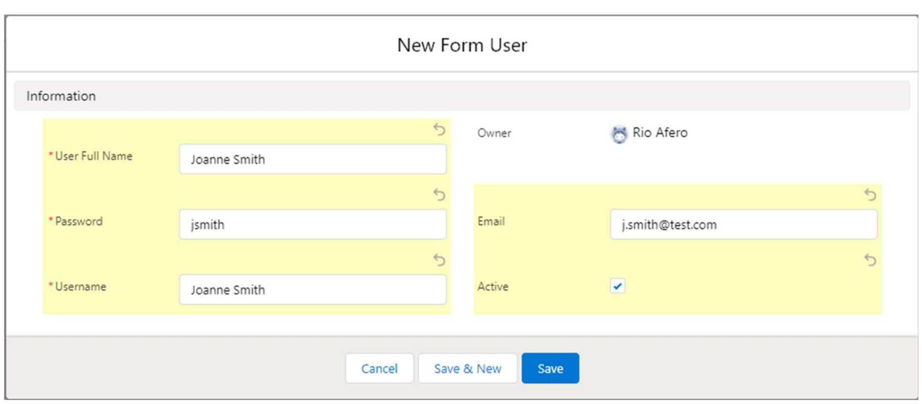
5. Form Users

This view provides a list of Form Users for you to view and update their details, assign forms or categories and update their credentials for your form portal, if you have one.

Chances are, that if you simply want to send links or QR codes to anonymous users to complete forms you won't use the functionality in Form Users. However, there are some powerful tools here that might inspire greater productivity within your business, so read on to get inspired.

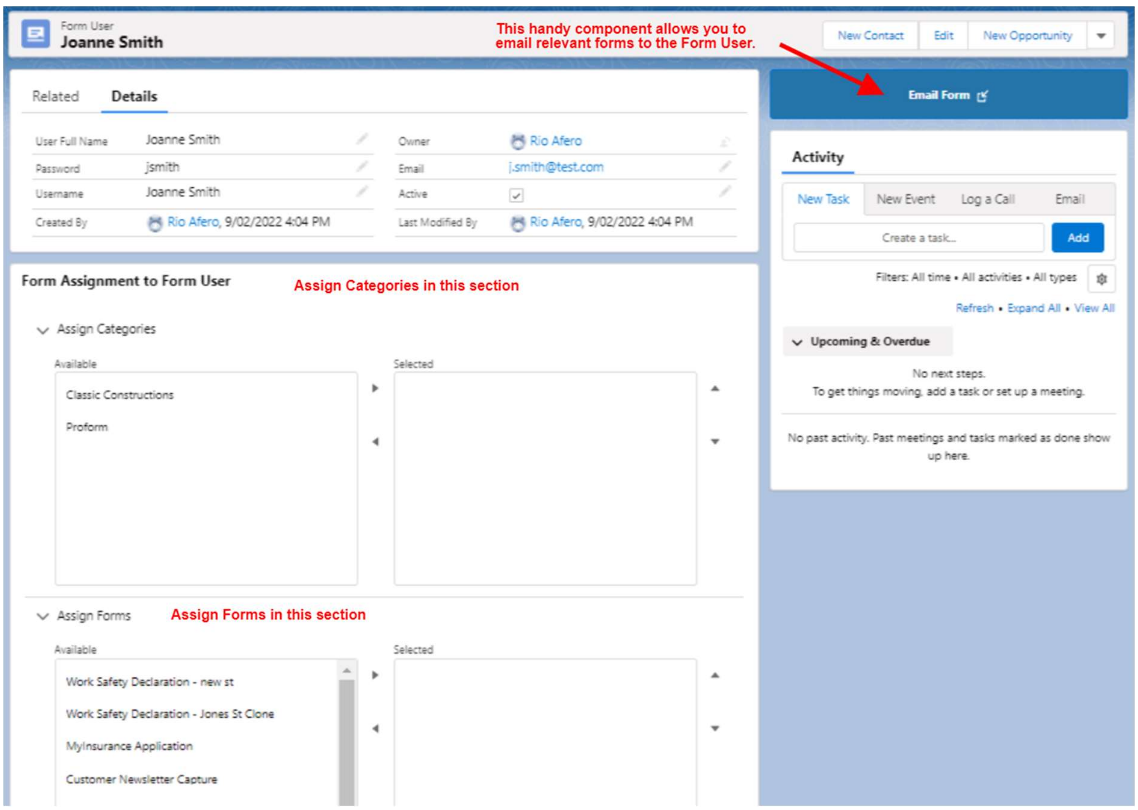
In the Form User page, select New to create a new Form User.

You can add contact name and assign a Form User a username and password to access your form portal. You can also add an email address and control form portal access via the Active checkbox.

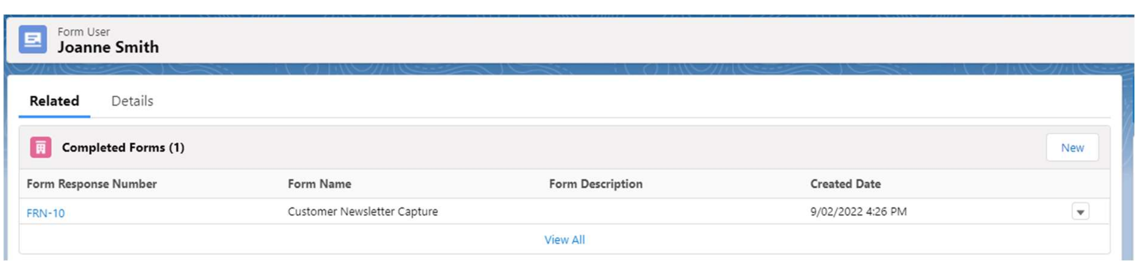


Form Users do not use any of your Salesforce licences.

Open a Form User record to change user details as well as form and category assignments. You can also email assigned forms to Form Users using the Email Forms component.



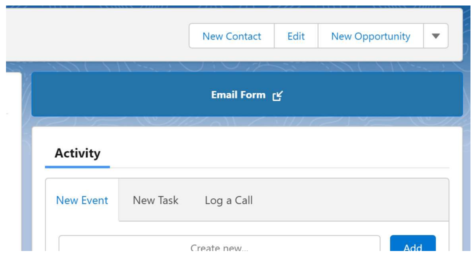
The Related tab lists any completed forms.



This is a very useful way of storing forms completed by Form Users.

Forms completed by Anonymous Users are also stored – but these are within the Completed Forms page (see section 6 below).

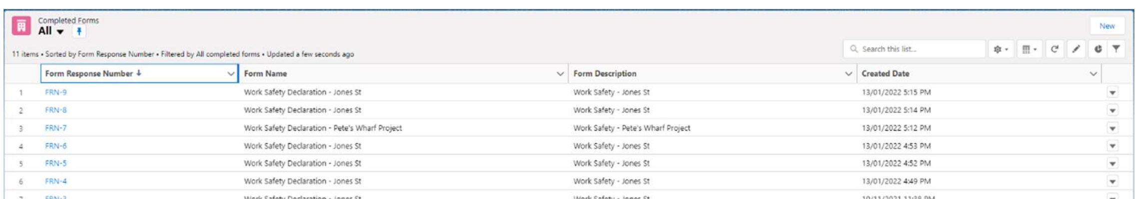
In the Details tab, the Email Form button allows you to email forms to this Form User. Click Email Form to bring up a list of forms.



From here you can email a form to the Form User (icon) or select Preview (icon) to preview the form.

6. Completed Forms

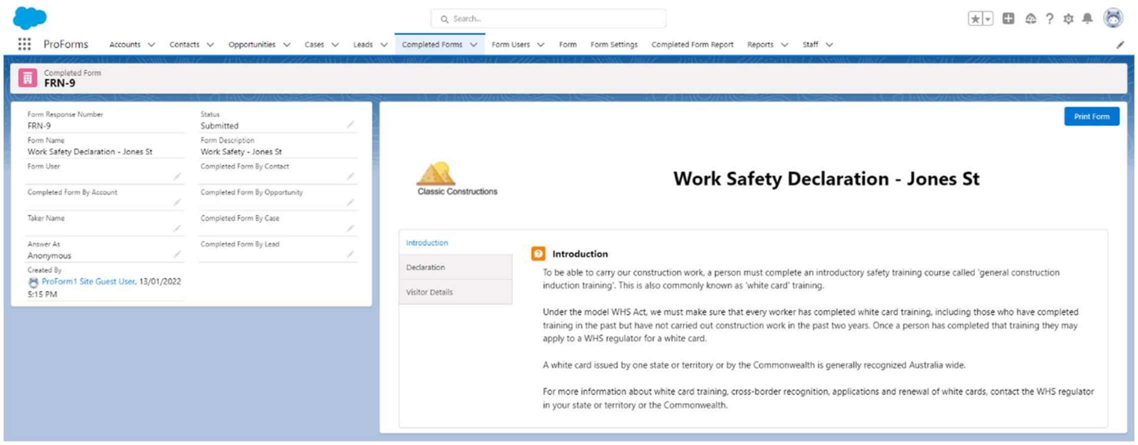
This page provides a great view of all the completed forms.



Here you get details of:

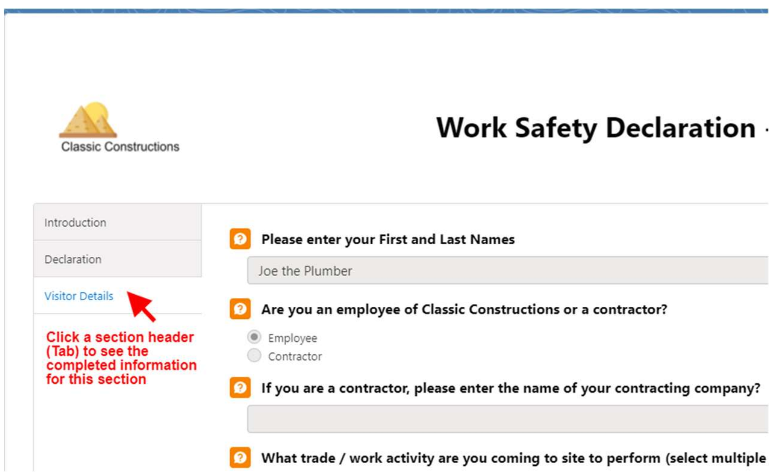
- Which form was completed
- The form description
- When it was completed

Click on a Form Response number to see the whole form and the answers.



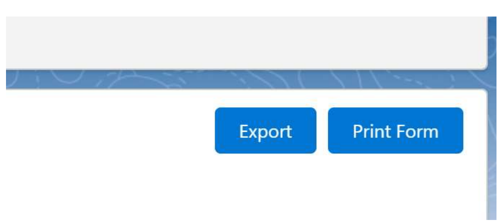
Relevant information on the form completion is contained on the left. A replica of the completed form is shown on the right. This can be printed if required.

If your completed form contains sections (i.e. Tabs) you can click each tab to see the underlying information.



Any documents uploaded as part of the form response are also stored in the Files object associated with this completed form record.

We've also included a very handy Export button that will take the data entered (excluding images, signatures or uploaded files) and export this to an Excel spreadsheet so you can access the raw data in another application – as needed.



7. Putting it all together …

7.1 Email alerts for completed forms

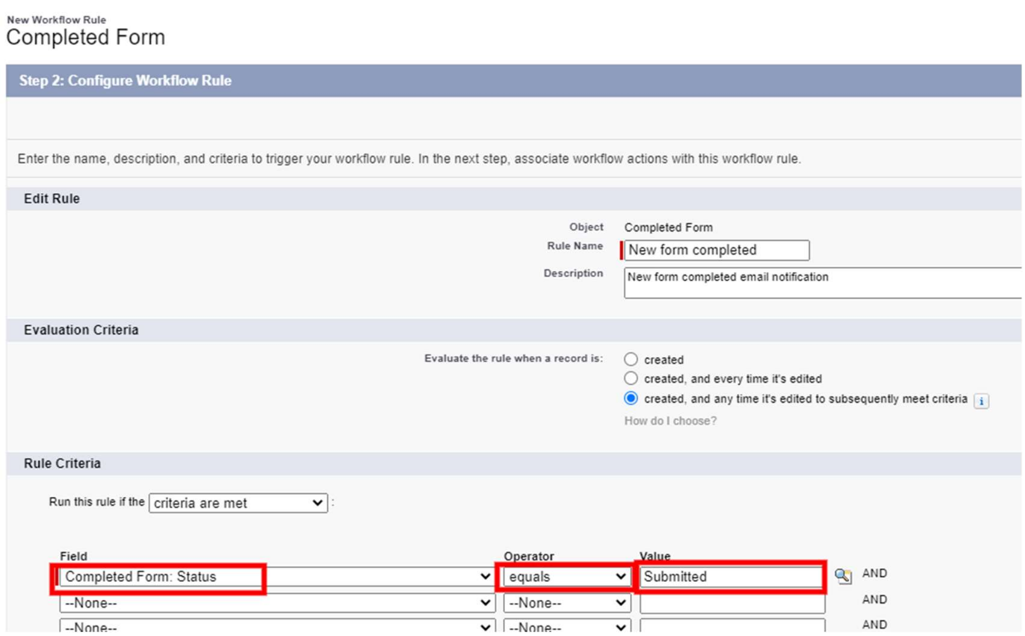
To create an email notification when a form is submitted, you need to create a standard Salesforce Workflow rule for the Completed Form object and configure an Email Alert action. If you haven't created a Workflow before you can access this page through Salesforce Help:

https://help.salesforce.com/s/articleView?id=sf.workflow_rules_new.htm&type=5

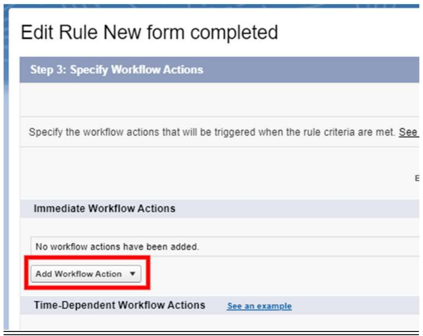
There are a range of criteria you can use, but the most common of these is the

Completed Form:Status equals "Submitted"

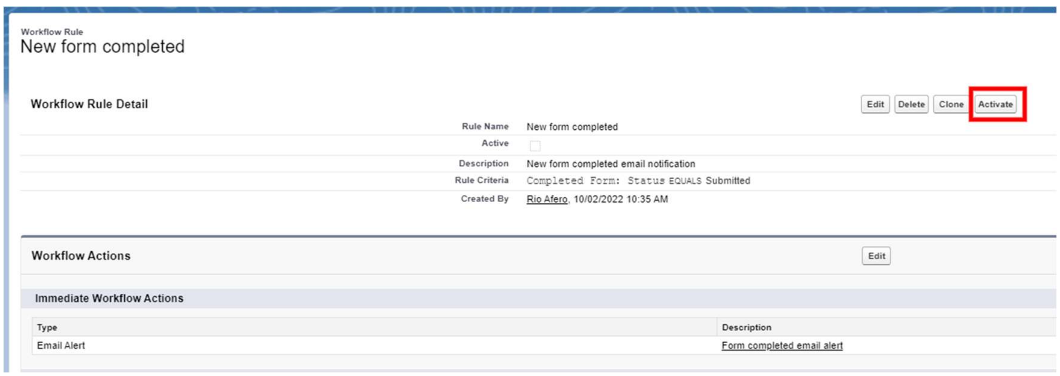
This will trigger when any form is submitted by any user.



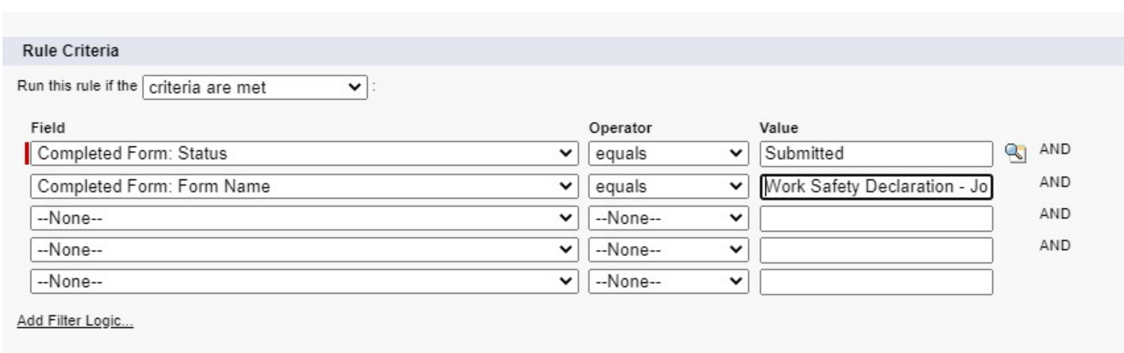
Next you add an email alert (or other workflow action) and select Done.



The final step is to Activate the rule when ready.



If you wish to set up different workflow actions depending on the form name submitted, set up the Rule Criteria to include a Completed Form: Form Name line as shown below:



In the above example the workflow action will trigger when a form named “Work Safety Declaration – Jones St” is submitted.

7.2 Examples

Let’s look at three examples that show you how to use the various features of ProForm depending on your use case.

Example 1 – New Hire Onboarding Form

Let’s say you’ve developed an onboarding form for a new staff member to complete. Assuming that staff members are all Salesforce internal users, you can email the new form from within the Contact record for this new team member.

To do this:

1. Set the Form Access to Internal
2. Link the form to the Contact record
3. Go to the new staff member’s Contact record
4. Use the Email Form button to email the form to them together with an email template you might normally use for this.

Example 2 – Site Check In Form

In another example, you have a simple site check-in form (like the ones we developed above). The users are all external to Salesforce and anonymous users (as far as your Org is concerned. The form fillers will put their name in form as one of the question responses – so you know who completed the form. You print the form’s QR code and put it at the entrance to the site for all visitors to scan and complete your form. You store the form as a Completed Form – not specifically associated with any Salesforce object.

To do this:

1. Set the form access to Public Site
2. There’s no need to link the form to a Salesforce object
3. Print the QR code – or incorporate it into the poster you make for the site entrance
4. Set up an alert for every time the form is completed and use Completed Forms to view the responses
5. Set up a report to track forms completed by site (or go to the ProForm home page to see recent form reporting)

Example 3 – Home Loan Application Forms

In this example, we have a series of forms for a prospective customer to complete as part of a home loan application. Without ProForm, you would email (or even mail) a group of forms and ask the customer to complete these. Forms would include personal details, a balance sheet, identity documents list an application form etc. The forms are quite long and users need to be able to save and exit the forms and come back to where they left off later.

Here you have created a form portal and linked the URL for this portal within Salesforce (within the Sites section of Setup).

To do this:

1. In Setup – Sites, add your own branded domain or subdomain or use the Salesforce domain for your org
2. In Form Settings – add the URL referenced in point 1 in the Public Sites Instances section
3. In the Form itself, set the Form Access to Public Site
4. In Form Settings, create a Category for the form collection – say New Loan Application, and assign it a colour and a logo if you wish.
5. Create the forms and make sure each one references the New Loan Application category
6. Create a Form User for the new applicant and assign the New Loan Application category to them
7. Send the new Form User an email with the public site URL, their username and password and they'll be able to complete the forms as they are able.
8. Set up an activity to check in on how they are going if they haven't completed in say a week.

Example 4 – Staff Safety Quiz

Let's say you want to create a short quiz to confirm staff members have read your safety briefing on evacuation in the event of a fire or other emergency.

Confirming understanding through a simple quiz is a great way of confirming staff are properly trained and also ensuring you have a record of when they did this. Many jurisdictions put the onus of proof of training on the organisation. Collating paper quizzes (which may get lost or destroyed in an emergency event) is a poor solution.

To develop a quiz:

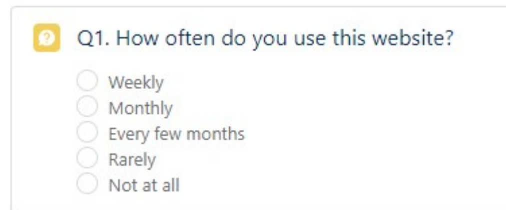
1. Create a form and use either Single Select [Vertical with Scoring] or Single Select [Horizontal with Scoring] question types
2. Assign a simple score for each correct answer – say 1 point, 5 or 10
3. Add any instructions – in the Header section or a Statement inserted at the start of the quiz
4. Go to the Scoring feature (select the 'Scoring' button in the Content Tab) and allocate the range of scores and associated messages. You could allocate score range for each possible result in your quiz or simply a pass / fail range – as you see fit
5. Set the Form Access to 'Internal' within Form Settings
6. Optionally, you can store the completed form against their Staff record (of Contact if you use this) by setting the 'Link to Form Object' to this object

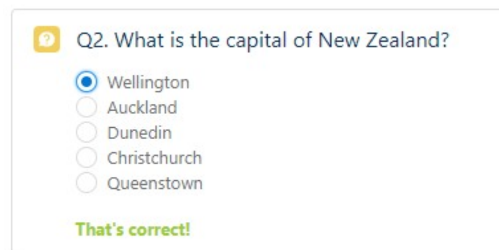
7. Send the link to the staff you want to complete this – using the Email Form component within the Staff page (see Section 5 above on how to do this)
8. Track the results with a report to list all staff and the date of completion of the quiz and sort by date – to track those who haven't done this.
9. Set a reminder in Salesforce to repeat the quiz – say every 12 months or whenever your policies require

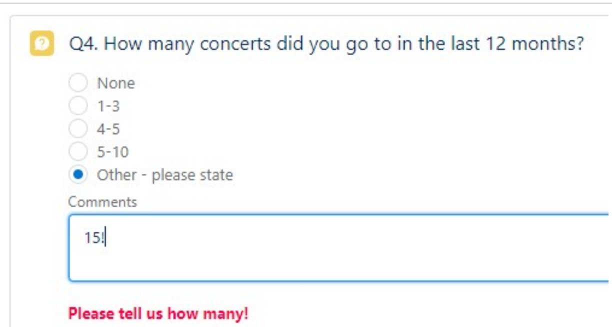
Using ProForm in this way will ensure you have a robust way of confirming compliance and ensuring all care is taken to guarantee employees are trained. It isn't the only thing you have to do for safety evacuations, but it is a great tool to help you comply.

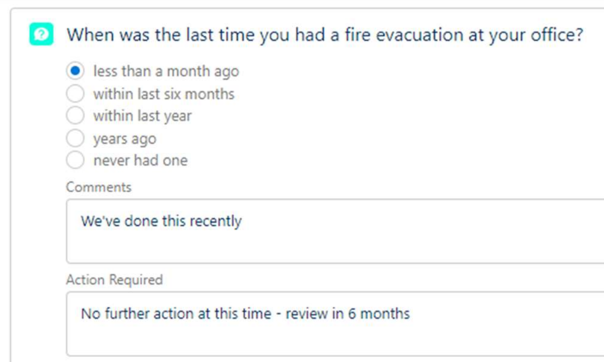
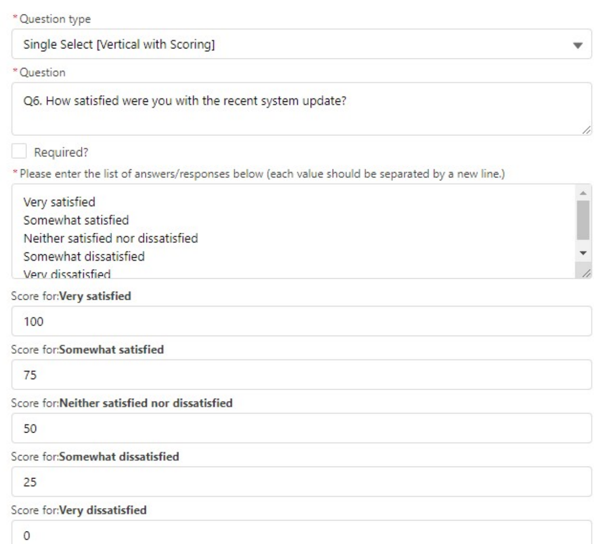
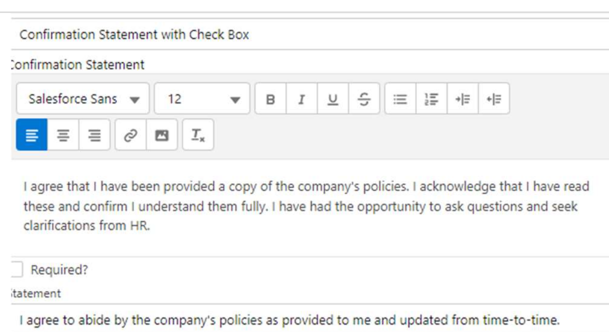
Appendix 1 – Question Types

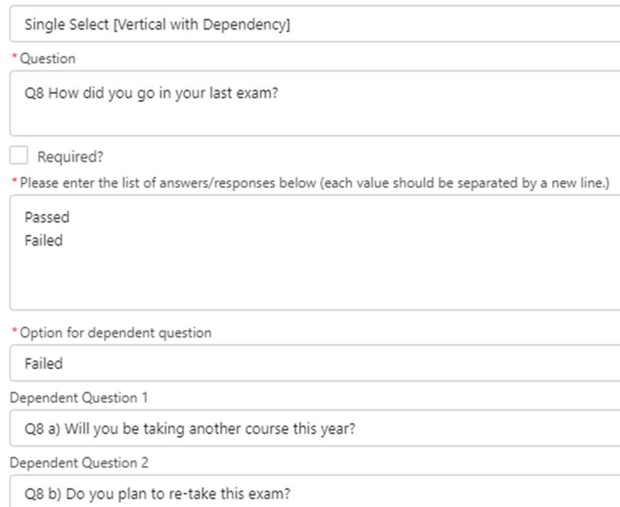
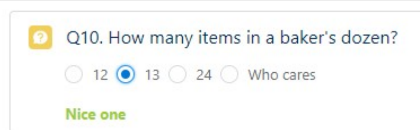
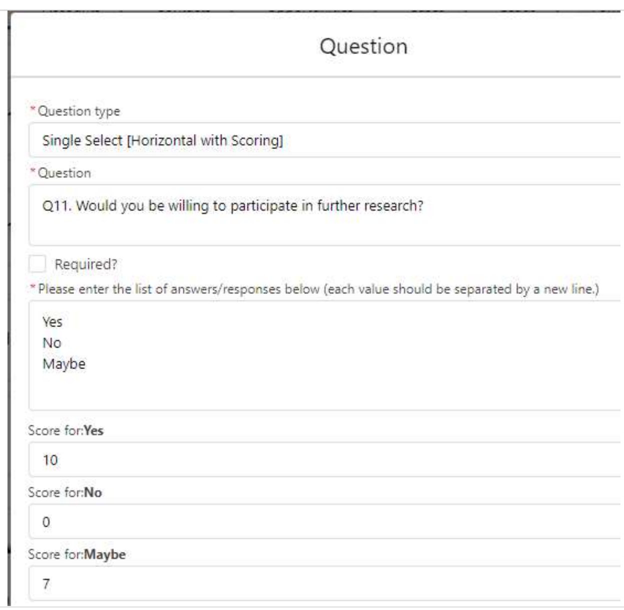
The following question types are supported in ProForm:

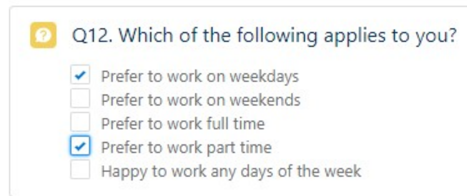
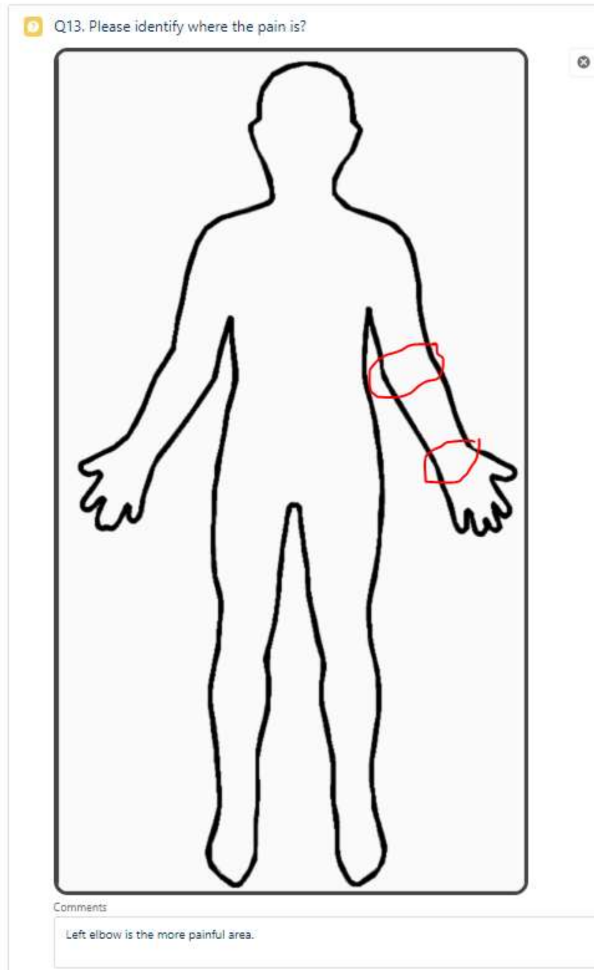
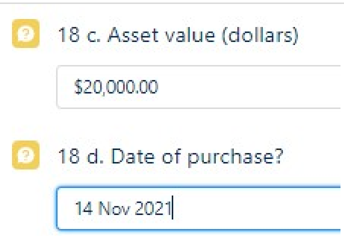
<table>
<tr><th>Question Type</th><th>Description</th><th>Example</th></tr>
<tr><td>Single Select Vertical</td><td>Select one option from a list of choices - displayed vertically</td><td>
</td></tr>
<tr><td></td><td></td><td></td></tr>
<tr><td>Single Select Vertical (with correct answer)</td><td>Select an answer from a list of choices, displayed vertically.

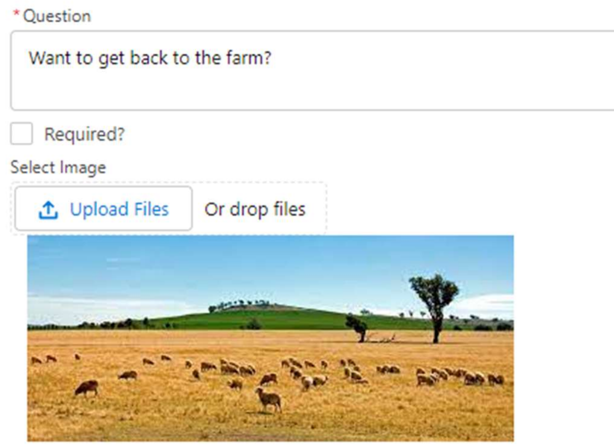
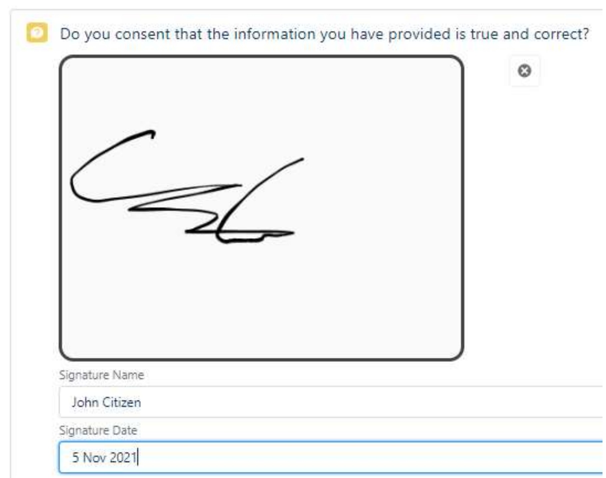
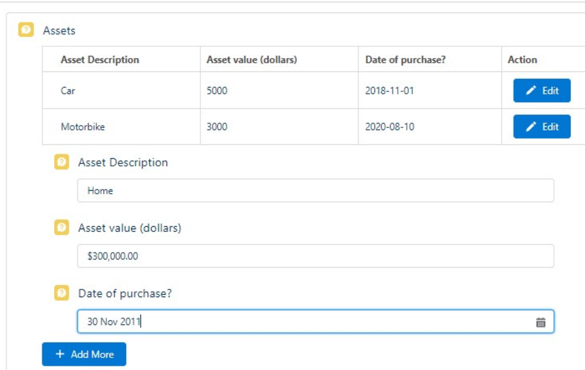
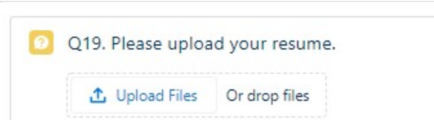
The list has one correct answer.</td><td>
</td></tr>
<tr><td></td><td></td><td></td></tr>
<tr><td>Single Select Vertical (with message)</td><td>List of choices, displayed vertically.

Each selection in the list can have an optional message (displayed when this option is selected)</td><td>
</td></tr>
<tr><td></td><td></td><td></td></tr>
<tr><td>Single Select Vertical (with message and comments)</td><td>List of choices, displayed vertically. Each selection in the list can have an optional message - plus room for a user comment- great for capturing more text if required e.g. “Other - please state?”</td><td>
</td></tr>
<tr><td></td><td></td><td></td></tr>
</table>

Single Select Vertical (with comments and action required)	List of choices, displayed vertically. Includes an optional user comment to allow user to provide additional information or feedback. Includes an Action Required field. This is for the user to indicate what action they will take. This is great for compliance / safety-related forms or other applications where you must indicate an action as part of answering this question.	
Single Select Vertical (with scoring)	Each choice can have a score associated with it – perfect for quizzes or surveys. We illustrate a Likert scale in the example opposite. Use these scoring questions together with the Scoring button (in the Content tab) to provide an overall score for your quiz.	
Confirmation Statement with Checkbox	Provides a statement with an accompanying checkbox (which follows the statement). Use this question type to confirm someone agrees to something – such as the company's policies or the terms of the application form etc.	

Single Select Vertical (with dependency)	Provides up to two additional questions that are dependent on the answer to this one. You create the dependent questions first, then create a "Single select vertical with dependency" question. Chose the option for the dependent questions. Then reference the dependent questions.	
Single Select Horizontal	Provides a list of choices, displayed horizontally.	
Single Select Horizontal (with correct answer)	Select an answer from a list of choices, displayed horizontally. The list has one correct answer.	
Single Select Horizontal (with scoring)	Each choice can have a score associated with it - for quizzes or surveys. Use these scoring questions together with the Scoring button (in the Content tab) to provide an overall score for your quiz.	

Multi select (Vertical)	Select multiple options from a list of choices - displayed vertically	
Mark on Picture	Ability to include a picture and allow the form user to mark this up, plus an optional comment	
Free text	Questions that require capture of text, currency, number, date or percentage	
Rating	Provides 5 stars to allow a respondent to rate something relating to the associated question	

Display Picture	Allows you to insert a picture and include an optional statement or question. You can resize the image by selecting a width or height in pixels.	
Signature	Allows signature capture including a space for adding the name of the person signing and a date	
Table	Allows a group of questions to be repeated multiple times. Typically if your paper form has tables – this is the question type to hold the overall table (see Tables in section 3.5 above)	
Upload Document	Allows a document to be uploaded as part of the form - document can be viewed within the Completed Form record and downloaded.	

Statement	Allows you to insert a statement (with a heading)