

Summary

NEW!**New form Preview options.** ([See page 3 for details.](#))

When building a form, users can now configure the form preview to simulate the size and orientation of the intended viewing device for that form.

NEW!**New Payment field.** ([See page 4 for details.](#))

The **Payment** field is a new 16-digit numeric field that allows a user to manually enter a customer's credit card number into a mobile form. The numeric digits are visible on the screen while the user enters them. However, once the user moves to a new field, each of the first 12 numeric digits is replaced with an "X" to ensure that the full credit card number remains hidden.

NEW!**Extract Date/Time elements using the Calculation widget.** ([See page 5 for details.](#))

1. When creating a *numeric* calculation using Date/Time fields, the user now has the ability to refer to a Date/Time field's day number of the month (e.g., 14th day of the month), or the Date/Time field's month number (e.g., "7" for July).
2. When creating a *text* calculation, the user now has the ability to refer to a Date/Time field's day name (e.g., Monday) or month name (e.g., July).

NEW!**Enhanced settings for controlling when data lookups are populated.** ([See page 7 for details.](#))

Populating data into a drop-down can cause a form to load more slowly. Now form builders now have more control over who can view data in a data lookup field.

NEW!**New text justification settings.** ([See page 8 for details.](#))

When creating forms, users can now apply text justification settings to the captions, hints, and answer fields in certain widgets.

NEW!**Expanded 'Read only,' 'Required,' and 'Hide' attributes.** ([See page 9 for details.](#))

Form builders now have more control over who can view and edit certain form fields.

(continued...)

Summary (cont.)

NEW!**New 'Expand table if screen size smaller than' settings.** ([See page 10 for details.](#))

New settings allow you to change the screen size percentage for smaller devices. This means that large tables will pan right versus having the fields attempt to fit within the viewable screen.

NEW!**New 'Remove border around answer' setting.** ([See page 11 for details.](#))

This new setting improves the appearance of your form by allowing you to remove the border around certain form fields.

NEW!**Null value supported in Score by Category widget.** ([See page 12 for details.](#))

When creating a Score by Category widget, a form builder can now add an answer with a score value of null (i.e., not applicable). Thus, the null answer will not count towards a scoring summary.

NEW!**New columns in 'Open form' and 'Open special' dialog boxes.** ([See page 13 for details.](#))

The **Open form** and **Open special** dialog boxes now contain the following columns: **Last modified**, **Modified by**, and **Created by**. In addition, the **Date** column header has been changed to **Create date**.

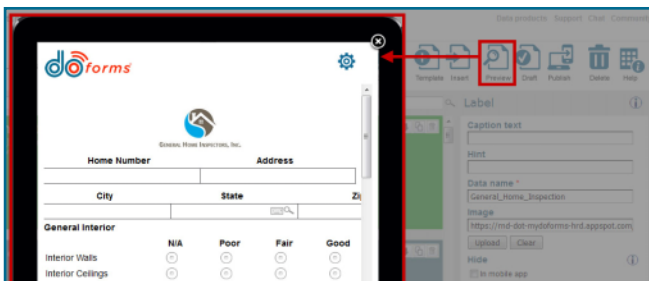
NEW!

New Form Preview options.

When building a form, users can now configure the Form Preview to simulate the size and orientation of the intended viewing device for that form. For example, if a form builder wishes to build a form that will be viewed in landscape mode on a 9" smartphone, they can configure the Form Preview to simulate a 9" smartphone in landscape mode.

To configure Form Preview options:

1. Load a form in the web portal, and then click the **Preview** button to open the form preview (highlighted in red, below):



2. Click the **Settings** icon to open the preview settings dialog box (highlighted in red, below):



3. Choose one of the following **Display mode** radio buttons:
 - **Device mode:** This emulates a mobile device screen.
 - **Paper mode.** This emulates an 8.5" wide piece of paper on screen. Paper mode preview is useful when previewing forms that will be accessed via form links or the web client.
4. If you choose **Device mode**, enter a screen size in the **Screen size** field (this field will be hidden if you choose **Paper mode**). The default size is 11.5 inches diagonally. Note the following:
 - The screen size is measured in inches diagonally, and may be increased/decreased in increments of as small as 0.1 inches.
 - Smartphones and tablets are manufactured with screens of varying sizes and resolutions. Therefore, the Form Preview function in Device mode will *closely* match your target device, but may not match it *precisely*. It is recommended that you start by entering your device's published diagonal screen size, and then compare the Form Preview image to your actual device's screen form image. If it doesn't match precisely (and you require a precise match), then increase or decrease the Form Preview screen size in increments of 0.1 inches until you arrive at a precise match.
5. Select either **Portrait** or **Landscape** orientation.
6. The settings described in Steps 3 through 5, above, are form-specific. To save these settings as default settings for **all** forms, select the **Make these my standard settings** checkbox.
7. Click the **OK** button to save all changes and preview the form with these new settings.



The images above show the same form, each previewed in Landscape orientation and in Device mode. However, the image on the left shows a diagonal screen size of 11.5 inches, while the image on the right shows a diagonal screen size of 6 inches.

NEW!

New Payment field.

The 'Payment' field is a new 16-digit numeric field that allows a user to enter a customer's credit card number manually into a mobile form. The numeric digits are visible on the screen while the user enters them; however, once the user moves to a new field, each of the first 12 numeric digits is replaced with an "X" to ensure that the full credit card number remains hidden. When the form is submitted, the full credit card number remains hidden from everyone — except to users who have permission to edit the submitted form via either the 'View Data' or the 'Dispatch' tab. The credit card number also remains hidden when the form is converted to PDF, is sent to an email address via PDF, or is printed.

To configure the Payment field:

1. Insert the **Payment** widget into a form.
2. Enter **Caption text**. In the sample shown in the first image, right, the caption reads, "Enter credit card number."
2. If desired, enter a **Hint**. In the sample shown in the first image, right, the hint reads, "16 digits only!"

Payment field shows all 16 digits while the user is entering them.

Payment field replaces first 12 digits with an "X" when the user moves to a new field.

Record_Name	Date_Created	Status	Enter_credit_card_number	Form_Record	Mobile_Device	Nickna
1	07/19/2016 15:03:07		XXXX-XXXX-XXXX-1234			

Payment field replaces first 12 digits with an "X" when the user views submitted form in View Data tab.

NEW!

Extract Date/Time elements using the Calculation widget.

1. When creating a *numeric* calculation using Date/Time fields, the user now has the ability to refer to a Date/Time field's day number of the month (e.g., 14th day of the month), or the Date/Time field's month number (e.g., "7" for July).
2. When creating a *text* calculation, the user now has the ability to refer to a Date/Time field's day name (e.g., Monday) or month name (e.g., July).

1

New *numeric* calculation options to extract Month number and Day of month:

A. To refer to a Date/Time field's day number of the month (e.g., 14th day of the month) in a numeric calculation:

- 1) Choose **Month number** from the **Field** drop-down in the **Expression**.
- 2) Select the name of the Date/Time widget that you are referencing.

In the example below (highlighted in red), the user created an numeric calculation that subtracts the day of the month of the **date_manual** widget from the day of the month of the **date_now** widget.

The example shown above would result in the form shown to the right.

The **date - manual** field's day number of the month (1) has been subtracted from the **date - now** field's day number of the month (14), resulting in the **elapsed number of days** (13).

B. To refer to a Date/Time field's month number (e.g., "7" for July) in a numeric calculation:

- 1) Choose **Month number** from the **Field** drop-down in the **Expression**.
- 2) Select the name of the Date/Time widget that you are referencing.

In the example below (highlighted in red), the user created an numeric calculation that subtracts the month number of the **date_manual** widget from the month number of the **date_now** widget.

The example shown above would result in the form shown to the right.

The **date - manual** field's month number (1) has been subtracted from the **date - now** field's month number form (7), resulting in the **elapsed number of months** (6).

2

New *text* calculation options to extract Month name and Day name:

A. To refer to a Date/Time field's day name (e.g., "Monday") in a text calculation:

- 1) Choose **Day name** from the **Field** drop-down in the **Expression**.
- 2) Select the name of the Date/Time widget that you are referencing.

In the example below (highlighted in red), the user created an numeric calculation that results in the display of:

[The day name of the **date_manual** widget] + [the constant "through"] + [the day name of the **date_now** widget]

The example shown above would result in the form shown to the right.

In the **Your service runs from** field, the **date - manual** field's day name ("Sunday") is displayed, followed by the constant ("through"), and finally the **date - now** field's day name ("Thursday").

B. To refer to a Date/Time field's month name (e.g., "July") in a text calculation:

- 1) Choose **Month name** from the **Field** drop-down in the **Expression**.
- 2) Select the name of the Date/Time widget that you are referencing.

In the example below (highlighted in red), the user created an numeric calculation that results in the display of:

[The month name of the **date_manual** widget] + [the constant "through"] + [the month name of the **date_now** widget]

The example shown above would result in the form shown to the right.

In the **Your service runs from** field, the **date - manual** field's month name ("May") is displayed, followed by the constant ("through"), and finally the **date - now** field's month name ("July").

NEW!

Enhanced settings for controlling when data lookups are populated.

The Data Lookup widget's new 'Restrict Data' settings are powerful and important new parameters that allow users to either enable or disable the loading of datasets within a data lookup field in a form. These settings help:

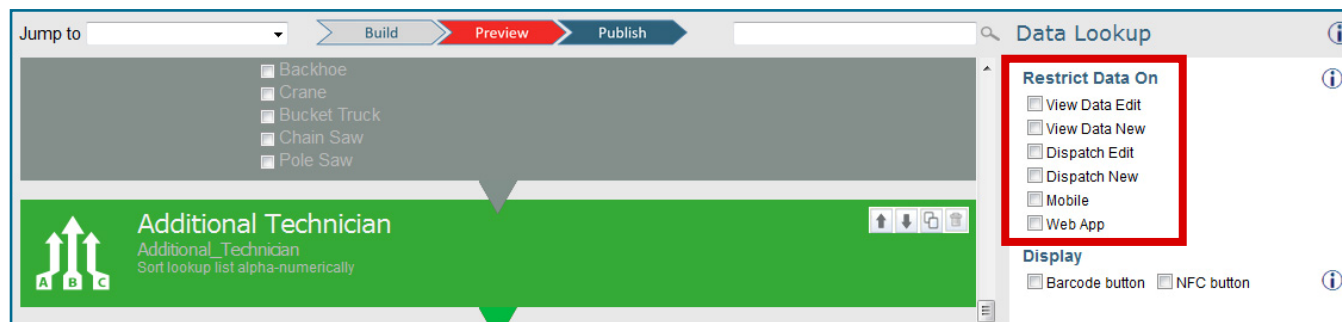
- **Decrease load times (for web portal users) of forms with data lookups containing large datasets.** The new settings can be used to restrict the loading of a large data lookup dataset during web portal access to a form, which will dramatically decrease the initial load time of the form. Restricting data can be especially helpful when dispatching and editing submitted forms.
- **Limit web app users' access to data lookup datasets within forms.** Because access to datasets for the web app are downloaded in real time, we have included the ability to restrict the loading of datasets on the web app (previously, this restriction would have applied to both the mobile and the web app, with no ability to differentiate the two).

To apply Restrict Data settings to Data Lookup widget — applicable when accessing form via View Data tab or Dispatch tab:

1. Insert a **Data Lookup** widget into a form. In the sample image below, a data lookup widget has been inserted into a form and labeled "Additional Technician."
2. Select one or more of the following **Restrict Data On** settings (highlighted in red, right):
 - **View Data Edit:** Restricts the loading of the data lookup dataset when a web portal user edits a submitted form through the **View data** tab.
 - **View Data New:** Restricts the loading of the data lookup dataset when a web portal user creates a new form through the **View data** tab.
 - **Dispatch Edit:** Restricts the loading of the data lookup dataset when a web portal user edits a submitted form through the **Dispatch** tab.
 - **Dispatch New:** Restricts the loading of the data lookup dataset when a web portal user creates a new dispatch through the **Dispatch** tab.

To apply Restrict Data settings to Data Lookup widget — applicable when mobile users or web client users access the form:

1. Insert a **Data Lookup** widget into a form. In the sample below, a data lookup widget has been inserted into a form and labeled "Additional Technician."
2. Select one or more of the following **Restrict Data On** settings (highlighted in red, below):
 - **Mobile:** Restricts the loading of the data lookup dataset when a mobile user accesses the form.
 - **Web App:** Restricts the loading of the data lookup dataset when a web client user accesses the form.



NEW!

New text justification settings.

When creating forms, users can now apply text justification settings to the captions, hints, and answer fields in applicable widgets.

To apply text justification settings to Caption, Hint, and Answer fields in a widget:

1. Insert a widget into a form. In the sample shown in the first image, right, a text widget has been inserted into a form.
2. Enter the **Caption text** for the widget. In the sample shown, the user has entered the caption "Enter your first name here."
3. Enter the **Hint** for the widget. In the sample shown, the user has entered the hint "(Given name)."
4. Select the appropriate **Justification** radio button for the **Caption**, **Hint**, and **Answer** of the widget:
 - **L**: Left-justifies the text.
 - **C**: Center-justifies the text.
 - **R**: Right-justifies the text.

The screenshot shows the doForms builder interface. On the left, a preview of a text widget is shown with a green header containing the text "Enter your first name here" and a hint "(Given name)". Below the header is a text input field. On the right, the configuration panel for the text widget is displayed. The "Caption text" field contains "Enter your first name here", the "Hint" field contains "(Given name)", and the "Data name" field contains "Enter_your_first_name_here". The "Default value" field is empty. The "Number of lines" is set to 1. Under the "Appearance" section, "Use defaults" is selected. The "Justification" section is highlighted with a red box, showing radio buttons for "Caption", "Hint", and "Answer". For "Caption", the "L" (Left) button is selected. For "Hint", the "C" (Center) button is selected. For "Answer", the "R" (Right) button is selected.

The screenshot shows a mobile view of the text widget. The widget is displayed on a screen with a black border. The header is blue and contains the text "Enter your first name here" in white. Below the header is a text input field. The hint "(Given name)" is displayed in the center of the input field. The answer "Jonathan Smith" is displayed on the right side of the input field. Red arrows point to the header, the hint, and the answer, with labels: "Caption (left-justified)", "Hint (center-justified)", and "Answer (right-justified)".

Based on the selections made in the sample shown in the first image, above, this second image shows what a mobile user would see for this text widget.

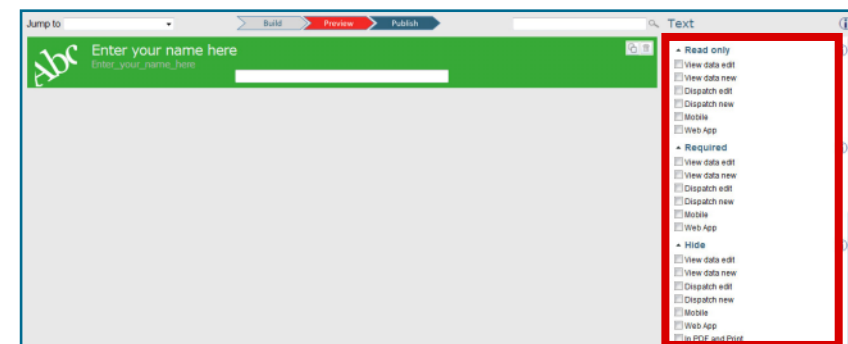
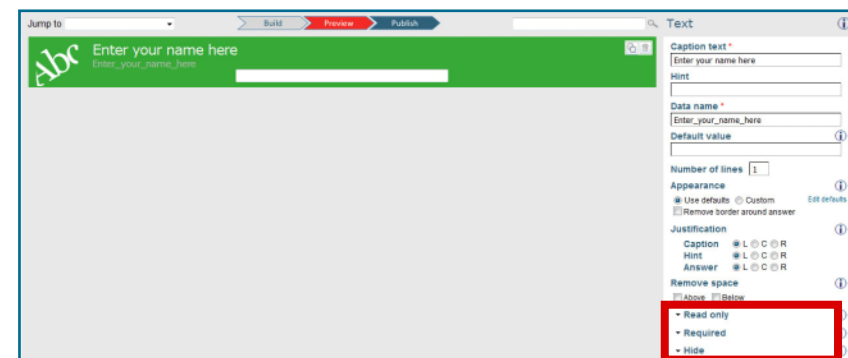
NEW!

Expanded 'Read only,' 'Required,' and 'Hide' attributes.

Form builders now have more control over who can view and edit certain form fields.

To apply new 'Read Only,' 'Required,' and 'Hide' attributes to form-building tools:

1. Insert a widget into a form. In the sample shown in the first image, right, a text widget has been inserted into a form.
2. Note that the **Read only**, **Required**, and **Hide** attributes (highlighted in red in first image) now have drop-down arrows.
3. Click each drop-down arrow to expand the attributes (highlighted in red in second image).
4. Select one or more of the following **Read only** attributes:
 - **View data edit**: Restricts a web portal user from editing this field when editing a submitted form through the **View data** tab.
 - **View data new**: Restricts a web portal user from entering data into this field when creating a new form through the **View data** tab.
 - **Dispatch edit**: Restricts a web portal user from editing this field when editing a submitted form through the **Dispatch** tab.
 - **Dispatch new**: Restricts a web portal user from entering data into this field when creating a new dispatch through the **Dispatch** tab.
 - **Mobile**: Restricts a mobile user from entering data into this field when creating a form.
 - **Web App**: Restricts a web app user from entering data into this field when creating a form.
5. Select one or more of the following **Required** attributes:
 - **View data edit**: Requires a web portal user to enter data into this field if editing and saving a submitted form through the **View data** tab.
 - **View data new**: Requires a web portal user to enter data into this field when creating a new form through the **View data** tab.
 - **Dispatch edit**: Requires a web portal user to enter data into this field if editing and saving a submitted form through the **Dispatch** tab.
 - **Dispatch new**: Requires a web portal user to enter data into this field when creating a new dispatch through the **Dispatch** tab.
 - **Mobile**: Requires a mobile user to enter data into this field when creating a form.
 - **Web App**: Requires a web app user to enter data into this field when creating a form.
6. Select one or more of the following **Hide** attributes:
 - **View data edit**: Hides this field from a web portal user when editing a submitted form through the **View data** tab.
 - **View data new**: Hides this field from a web portal user when creating a new form through the **View data** tab.
 - **Dispatch edit**: Hides this field from a web portal user when editing a submitted form through the **Dispatch** tab.
 - **Dispatch new**: Hides this field from a web portal user when creating a new dispatch through the **Dispatch** tab.
 - **Mobile**: Hides this field from a mobile user when creating a form.
 - **Web App**: Hides this field from a web app user when creating a form.
 - **In PDF and Print**: Hides this field when the form is converted to PDF or printed.



NEW!

New 'Expand table if screen size smaller than' settings.

New settings allow you to change the screen size percentage for smaller devices. This means that large tables will pan right versus having the fields attempt to fit within the viewable screen.

Sometimes a table (which has the **Fit to screen width** attribute applied to it) that fits perfectly into a tablet screen may be squeezed too narrowly when viewed on a smartphone screen. For example, **Image A**, right, shows an invoice table that fits perfectly into a 10.5" tablet screen. However, **Image B**, right, shows the same invoice table being squeezed into a 6" smartphone screen. As you can see, the table is difficult to read.

The new **Expand table if screen size small than** settings allows the form builder to force the table to expand to more than 100% of the width of the screen – if the table is being viewed on a screen of a certain diagonal size.

For example, a form builder desires that – if a table is being viewed on a screen less than 8" diagonally – the table expand to 150% of the width of the screen (requiring the user to pan right to see the entire table).

Image C, right shows the table with the setting applied. Notice how the table is not squeezed anymore, and requires the user to pan right to see the remainder of the table (**Image D**, right).

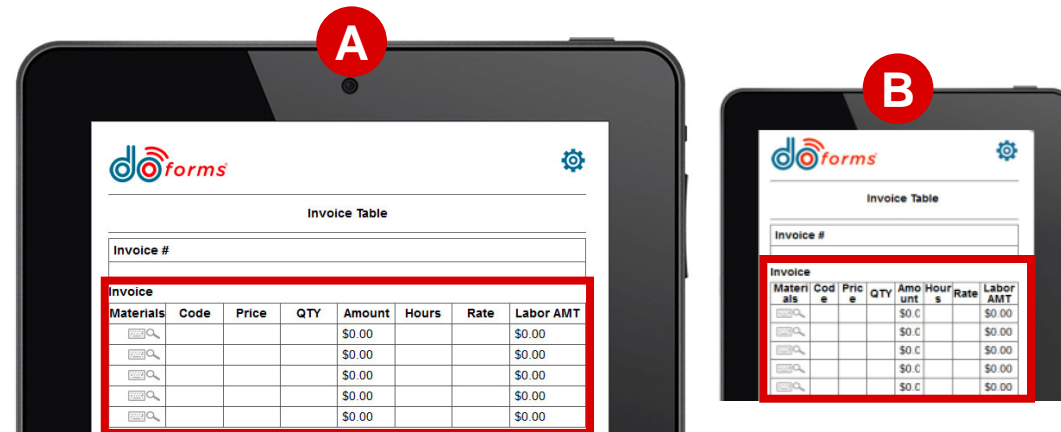


Table fits perfectly in 10.5" screen.

Same table is squeezed narrowly into 6" screen, making it difficult to read.

Table

Table label
Table

Data name *
Table

Number of rows * 5

☐ Variable row number
Number entered must <= number of row

☐ Use checklist

☒ **Fit to screen width**

☐ Equally space columns

☐ Use caption length

☐ Adjust column width

☒ **Expand table if screen smaller than**

8 Inches diagonally

Select a value greater than 100% to expand your table beyond the screen. Ex. 200% would give you a table twice the width of the screen.

100%
100%
125%
150%
175%
200%
225%
250%
275%
300%

To apply the 'Expand table if screen size smaller than' settings to a table:

1. Select a table and select the **Fit to screen width** attribute (highlighted in red, left).
2. Select the **Expand table if screen size small than** checkbox, and then select a screen size from the **inches diagonally** drop-down list (highlighted in green, left).
3. Select a value to expand the table beyond the screen. For example, **150%** would give you a table 1.5x the width of the screen.



'Expand table if screen size smaller than 8 inches diagonally' has been applied.

Now, on 6" screen, table is expanded to 150% of width of screen.

User must pan right to see the remainder of the table.

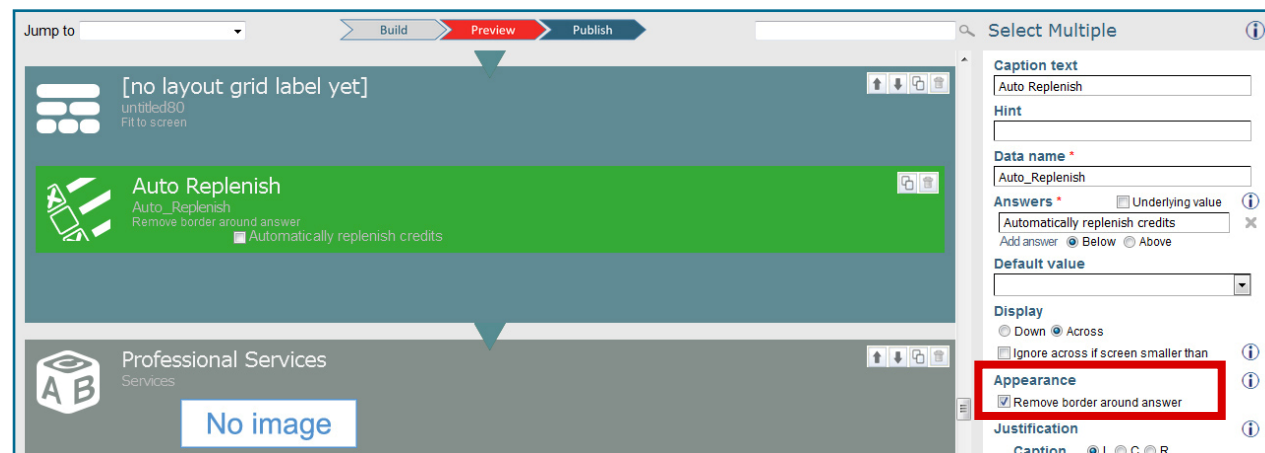
NEW!

New 'Remove border around answer' setting.

This new setting improves the appearance of your form by allowing you to remove the border around certain form fields.

To remove a border around answer:

1. Insert in a form a widget that allows users to enter an answer. In the example shown in the first image, right, the user has inserted an **Email** widget into a form.
2. Select the **Remove border around answer** option under **Appearance** (highlighted in image, right)



The images below show the same answer field, 'Automatically replenish credits,' with and without a border:

'Automatically replenish credits' with border around it.

The image shows a mobile form preview. At the top is the doforms logo and a settings gear icon. Below is a 'Credits' section with a table. Under the table is a checkbox labeled 'Automatically replenish credits'. Below that is a 'Professional Services' section with another table. A red arrow points from the text 'Automatically replenish credits' with border around it. to the checkbox.

Description	Qty	Package	Price	Total
Web Form & Report Credits				\$0.00

Description	Qty	Unit	Price	Total
Form Building		Per Form	\$99.00	\$0.00
Email Templates		Per Template	\$199.00	\$0.00
Integration Connector Setup Fee		Per Connector	\$199.00	\$0.00
Custom Services Rate		Per Hour	\$75.00	\$0.00

'Automatically replenish credits' with border removed.

The image shows a mobile form preview, similar to the one on the left but with the border removed around the 'Automatically replenish credits' checkbox. A red arrow points from the text 'Automatically replenish credits' with border removed. to the checkbox.

Description	Qty	Package	Price	Total
Web Form & Report Credits				\$0.00

Description	Qty	Unit	Price	Total
Form Building		Per Form	\$99.00	\$0.00
Email Templates		Per Template	\$199.00	\$0.00
Integration Connector Setup Fee		Per Connector	\$199.00	\$0.00
Custom Services Rate		Per Hour	\$75.00	\$0.00

NEW!

Null value supported in Score by Category widget.

When creating a Score by Category widget, a form builder can now add an answer with a score value of null (i.e., not applicable). Thus, the null answer will not count towards a scoring summary.

To create a null value Score by Category answer:

1. Drag a **Score by Category** widget into a form (highlighted in red, right).
2. Create your answers for the category.
3. Create a final answer called "Not applicable" (or whatever you wish to call it), and select the **NA** checkbox next to it (highlighted in green, right).
4. Drag a **Score summary** widget into the form.

The screenshot shows the doForms builder interface. On the left, a form preview shows three widgets: 'Kitchen cleanliness', 'Dining hall cleanliness', and 'Score summary'. The 'Dining hall cleanliness' widget is highlighted with a green border. On the right, the configuration panel for the 'Score by Category' widget is shown, also highlighted with a red border. The 'Answers' section lists five options: 'Very clean' (Score 10), 'Satisfactory' (Score 5), 'Dirty' (Score 2), 'Very dirty' (Score 1), and 'Not applicable' (Score NA). The 'Not applicable' option is selected with the 'NA' checkbox.

In the resulting mobile form (right), the user has entered answers of:

- **Kitchen cleanliness > Very clean**
- **Dining hall cleanliness > Satisfactory**

Both of these answers count towards the score summary (highlighted in red, right).

The screenshot shows the resulting mobile form. The 'Kitchen cleanliness' widget has 'Very clean' selected. The 'Dining hall cleanliness' widget has 'Satisfactory' selected. The 'Score summary' widget is highlighted with a red border and shows the following data:

Category	Poss.	Score	
Kitchen	10	10	100%
Dining hall	10	5	50%
Total	20	15	75%

In the same mobile form (right), the user has entered answers of:

- **Kitchen cleanliness > Very clean**
- **Dining hall cleanliness > Not applicable**

The **Kitchen** answer counts towards the score summary. However, the **Dining** answer is not applicable, so it does not count towards the score summary and is thus hidden (highlighted in red, right).

The screenshot shows the resulting mobile form. The 'Kitchen cleanliness' widget has 'Very clean' selected. The 'Dining hall cleanliness' widget has 'Not applicable' selected. The 'Score summary' widget is highlighted with a red border and shows the following data:

Category	Poss.	Score	
Kitchen	10	10	100%
Total	10	10	100%

NEW!

New columns in 'Open form' and 'Open special' dialog boxes.

The 'Open form' and 'Open special' dialog boxes contain the following new columns (highlighted in red, below), providing more information about when forms were created, when they were last modified, and who modified them:

- **Last modified:** The last date the form was modified.
- **Modified by:** The last user who modified the form.
- **Created by:** The user who created the form.

In addition, the 'Date' column heading has been changed to 'Create date.'

Open form

Select a form from your account to open: ☒ Both ☐ Draft ☐ Published

Form name	Type	Last modified	Modified by	Create date	Created by
Auto-email	Published	06/09/2016		06/09/2016	david@writeanddesign.co
Contact Form	Published	05/31/2016	david@writeanddesign.com	05/31/2016	david@writeanddesign.co
Contact Form 2	Published	06/21/2016		06/21/2016	david@writeanddesign.co
Crime Scene Form 1	Published	05/31/2016	david@writeanddesign.com	05/31/2016	david@writeanddesign.co
Data lookup Form	Published	05/31/2016	david@writeanddesign.com	05/31/2016	david@writeanddesign.co
Deleteme	Published	06/02/2016	david@writeanddesign.com	06/02/2016	david@writeanddesign.co
deletemeplease	Published	08/16/2016		08/16/2016	david@writeanddesign.co
doForms Pricing Proposal	Published	05/31/2016	david@writeanddesign.com	05/04/2016	MDT
Google Map Launch	Draft	05/11/2016	david@writeanddesign.com	05/11/2016	david@writeanddesign.co
GPS auto-stamp2	Published	06/09/2016		06/09/2016	david@writeanddesign.co
Home Inspection - English	Published	07/19/2016		07/19/2016	david@writeanddesign.co
Home Inspection - Italian	Published	07/19/2016		07/19/2016	david@writeanddesign.co

Select a form from the doForms Public Library