





ProntoForms Getting Started Guide

1. Device Setup

Getting ProntoForms on your device is easy!

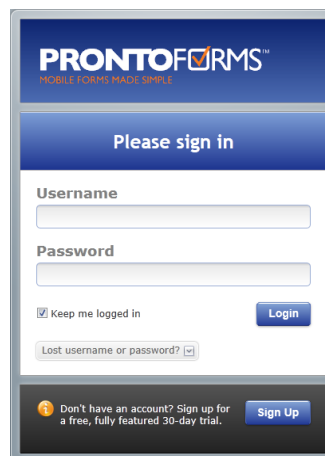
 <p>iPhone</p> <p>Pronto is available free through iTunes on the Apple iPhone App Store. Ensure your device is at OS 3.2 or higher and install it.</p>	 <p>Android</p> <p>Pronto is available free on the Android Market. Search for ProntoForms on your device and download it.</p>
 <p>Blackberry</p> <p>Pronto is available free on the Blackberry App World. Search for ProntoForms on your device and download it.</p> <p>See how to resolve "Registration failed" messages when logging in.</p>	 <p>webOS</p> <p>Pronto is available free on the HP webOS App Catalog. Search for ProntoForms on your tablet and download it.</p>

Tap on the Pronto icon and sign in with the user name and password provided in your welcome email or SMS message. Click on the following link for more details:

<http://truecontext.zendesk.com/entries/20144638-downloading-prontoforms-to-your-mobile-device>

2. ProntoForms Portal Sign In

Go to <https://live.prontoforms.com> and enter the user name and password provided in your welcome email or SMS message.



The screenshot shows the ProntoForms sign-in interface. At the top is the ProntoForms logo with the tagline 'MOBILE FORMS MADE SIMPLE'. Below the logo is a blue header with the text 'Please sign in'. The main form area contains the following elements: a 'Username' label followed by a text input field; a 'Password' label followed by a text input field; a checkbox labeled 'Keep me logged in' with a 'Login' button to its right; and a link labeled 'Lost username or password?' with a small icon. At the bottom of the form, there is a message: 'Don't have an account? Sign up for a free, fully featured 30-day trial.' followed by a 'Sign Up' button.

3. Form Creation and Deployment

To create a new form, navigate to the FormSpace in which you want to create the form. Click on the **+ Create Form** button to launch the Form Builder and begin creating a new form.

Pages

All ProntoForms forms are made up of a set of pages and questions. We use pages to help break up mobile workers' workflow into logical steps that they need to complete. Each page generally contains a set of questions that are related.










When you start to create a form, you'll be given a single page to start adding your questions. You can name that page by clicking on the current title "New Page" and replacing it with the desired page name.

- You can add additional pages by clicking on the **+ Add** button at the top left.

To view the questions on a page, click on the blue square with the page number.

Questions

The question for a page are displayed in the right panel of the Form Builder. When you mouse over a question, you'll be able to see information about the question, such as its [data type](#) and form control type. On the right, you'll see actions that you can perform on this question:

-  **Type** - to change the control type
-  **Edit Properties** - to edit the question properties, such as the answer choices, validation or question label
-  - to move this question to another page (you can also drag and drop it if your browser supports it)
-  - to move this question up (you can also drag and drop it if your browser supports it)
-  - to move this question down (you can also drag and drop it if your browser supports it)
-  - to copy this question
-  - to delete this question

Adding Questions



Each form question is created by first defining the [type of data](#) that you wish to collect. Once you've selected the type of data and control that will appear on the form, you can enter the question text that will appear on the form as well as set properties for the question.

Your options for saving are as follows:


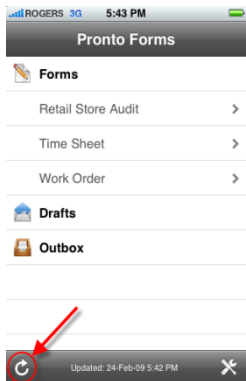

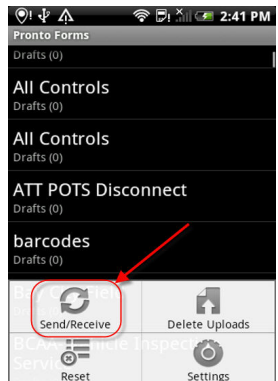
- You can click **Save** as you are going along to save changes up to that point.
- If you want to continue building the form at a later date ,select **Save & Close**. This will store a draft version of the form in the FormSpace.
- And if you are ready to deploy this form immediately to users, selected **Save & Deploy**. This will remove the "Draft" label from the form and deploy it to all users with privileges in the FormSpace.

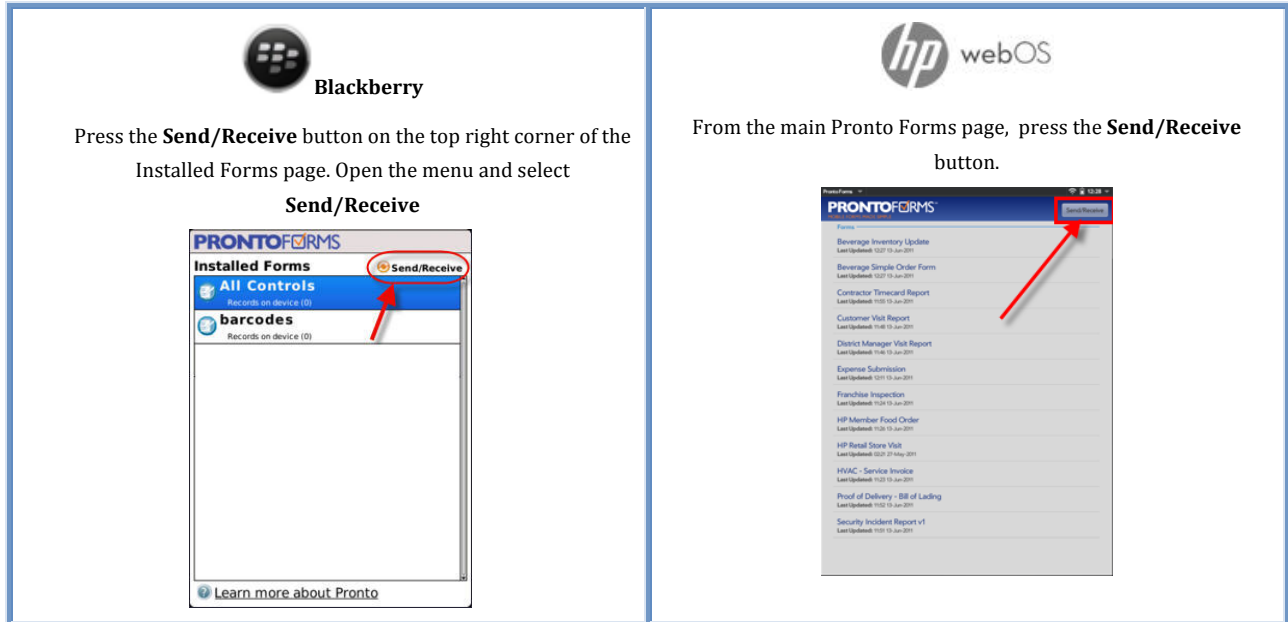
Once you have deployed a form go to next step to install and view the form on your device.

Click on the following link for more details: <http://truecontext.zendesk.com/entries/20170171-1-form-building-basics>

4. Send/Receive and View Form on Device

To install your newly deployed form in the ProntoForms application on your device, you must trigger a communication with the ProntoForms Portal called a Send/Receive.

<p style="text-align: center;"> iPhone</p> <p>Press the Send/Receive icon in the bottom left corner of the Pronto Forms main page.</p> 	<p style="text-align: center;"> Android:</p> <p>From the main Pronto Forms page, press the device menu button and then press the Send/Receive item.</p> 
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When the Send/Receive operation completes successfully, the form you created and deployed will be displayed in the list.

Data Record Submission

From the main Pronto Forms page, select or tap a form name to begin filling out a new data record. Navigate through the form, answering and filling out all of the questions on each page. On the last page, press the **Send** or **Send Now** (iOS) button to trigger an automatic Send/Receive operation. This will deliver the now completed data record to the ProntoForms Portal.

5. Viewing Completed Data Record

The **Data Records** page provides a place to view and download selected submitted form records. Depending on your user role and permissions, you will be able to see only records that you have submitted, all records from a given FormSpace or all records in the Team.

The default view on the Data Records page shows all submitted records in the **Results** table. You can apply filtering by expanding .


Results

Each row in the Results table represents a single data record. Each data record contains several columns of data, some of which are links that can be clicked on to take you to the details of that particular value.

Viewing Data

Clicking on the link in the **Reference #** column of the Results table will display the data that was captured in the record.

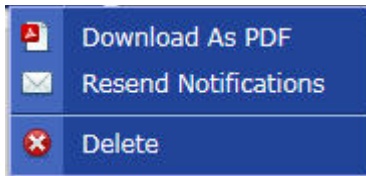
PDF

You can display the PDF for any individual submitted data record. The PDF can be downloaded as a file and saved to your computer or printed from the browser. To generate a PDF view, simply click on the PDF icon  available from the popup mouse over menu for each record in the Results table.


The PDF view can also be reached from the Data Record Information page. Click on the




button or select **Download As PDF** from the menu.




Chart

The Chart icon  allows you to graphically display the forms submitted, by form and by user, over the selected time period by Day, Week or Month. You can display the output as an HTML webpage or as a PDF document which you can save on your PC.

Plot Data Records On a Map

The Plot Data Records on a Map icon  will show the location that the data records were submitted from on a map. Only data records that contain valid GPS coordinates will be displayed. The geo-stamps need to be enabled in the Form Details of each form in order for coordinates to be collected.

Export (CSV)

The CSV icon  allows you to download selected forms into a Comma Separated Value (CSV) file that can be opened in Excel.

Click on the following link for more details: <http://truecontext.zendesk.com/entries/20175538-1-reporting-results>

6. Where to Get More Info

View our [on-line knowledge base](#) to learn more about ProntoForms.