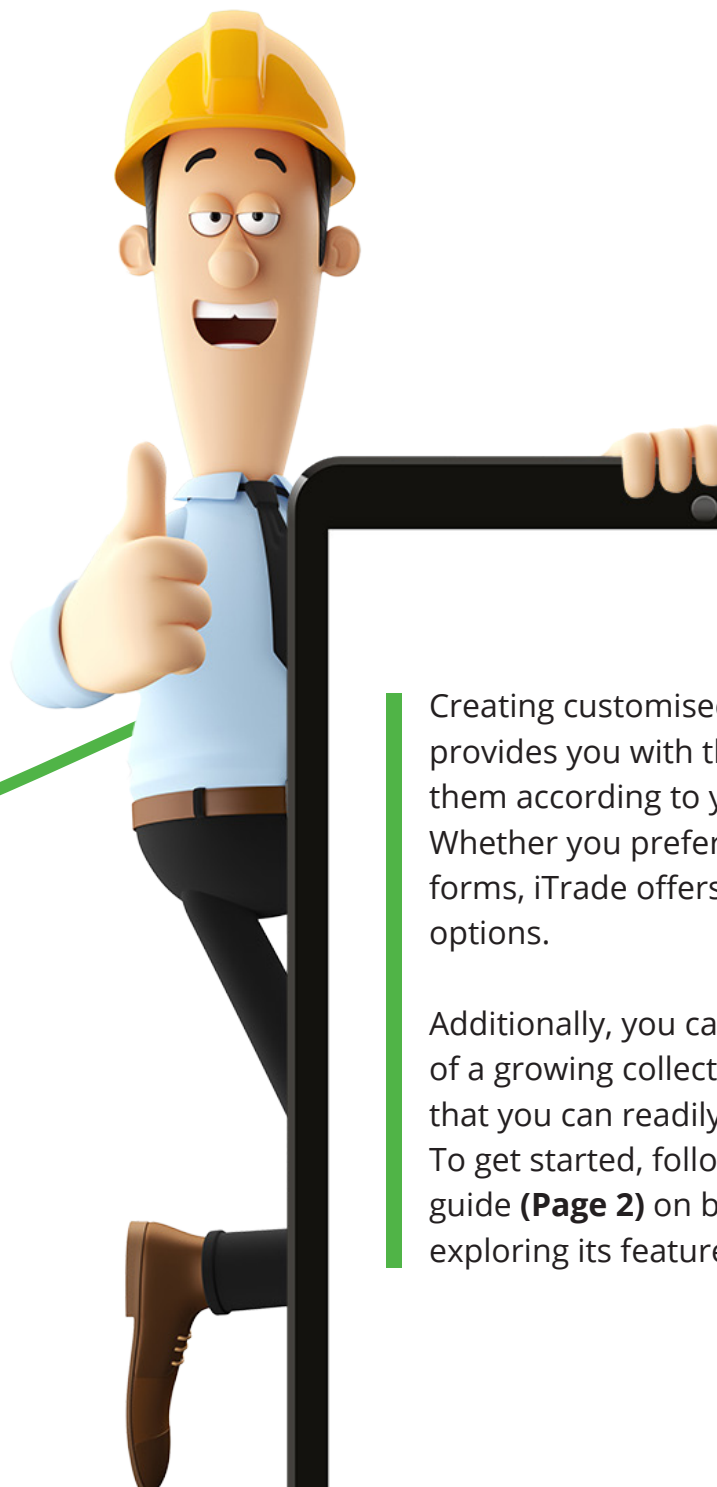# iTrade

FORMS BY iTRADE

Creating customised forms in iTrade provides you with the flexibility to tailor them according to your preferences. Whether you prefer concise or elaborate forms, iTrade offers a wide range of options.

Additionally, you can take advantage of a growing collection of *FREE* forms that you can readily adopt as your own. To get started, follow this step-by-step guide **(Page 2)** on building a form and exploring its features and options.

1

Navigate to FORMS and select "+ New Form" from the left-hand side menu.

2

Give the form a suitable name then select "+ Label". You can choose from these various label types →

3

In the form builder footer there are several other options you may like to try including making the form compulsory, requiring sign-off, displaying a Fail-Caution Summary at the end, third part sections and more. After building a form, use the blue "PREVIEW PDF" button in the form footer to view how the finished form will look.

- **Text Response:** The most common label type, allowing field workers to enter plain text as answers to questions or statements.
- **Heading Photo:** Display a full page-width photo on the report, ideal for showcasing premises or segmenting the report.
- **Embedded Photo:** Display a smaller photo next to its corresponding label, useful for "before" and/or "after" images.
- **Yes/No/NA:** This label type allows for a YES, NO, or NA selection in the form.
- **Force Yes:** Makes it mandatory to select "YES" if this label is required.
- **Date Picker:** Provides a calendar for picking a date.
- **Pass-Fail-Caution:** The report itself will highlight a "Pass" in green, a "Fail" in red, and "Caution" orange.
- **Tick Box:** The report will display a ticked or unticked checkbox.
- **List Creator:** Give it a title and let your field workers enter entries as needed, ideal for hazard lists, etc.
- **Canned Answers:** Presents a question or statement with a dropdown list of preselected answers to choose from. Customizable at FORMS/Canned Answers.
- **Follow On:** Under each label you have the option to select "Add Follow ON" allowing any of the above label types to be set with a specific follow-on label, which can be the same or a different label type.
- **Signature:** There are two types of signatures in iTrade forms. The first is the label type signature field, which can be located anywhere in the form. The second option is to select "Signature Required" at the bottom of the form, ensuring a signature is captured before the form can be completed.
- **Heading:** Adds a full width black reverse block heading into the form.
- **Subheading:** Adds an indented full width bold text heading into the form with light teal background.
- **Duplicatable Subheading:** Also adds a full width test heading, however not bold text, and a light blue background. Includes an advanced feature that allows subheadings to be duplicated and renamed in the App along with all the labels under them, extending to the next heading or to the end of the form. Useful for scenarios where multiple items require a set of tests or inspections, and the quantity of items onsite is unknown or changes from site to site. Examples could include "Bedrooms" in a house inspection or "Fire Extinguishers" in a factory.
- **Form Statement:** Adds a block of full width text that requires no reply and DOES NOT appear on the App, useful when a finished form needs to display generic data (maybe a legal statement).
- **Worker Statement:** Allows field workers to add full width text into the form. Suitable for summaries or final conclusions etc.
- **Page Break:** start the next field on a new page. Helps break down the final report pdf making it easy to read.

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3rd Part Sections allow you to designate parts of a form that can be edited by the people you email it to, this is usually your customer or, as an example, other field workers who need to sign a SWMS. A form containing a 3rd Party Section will not be considered complete until the 3rd party section has been completed by all recipients. Recipients' can only edit the 3rd party section, not the entire form.

Feel free to experiment with forms by copying our Free Forms into your account and customizing them to suit your needs. Remember, you can make changes to forms at any time, and they will apply to all new jobs created after the modifications are made.

With iTrade's customizable forms and various features, you can streamline your workflow and ensure accurate data collection in the field.

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