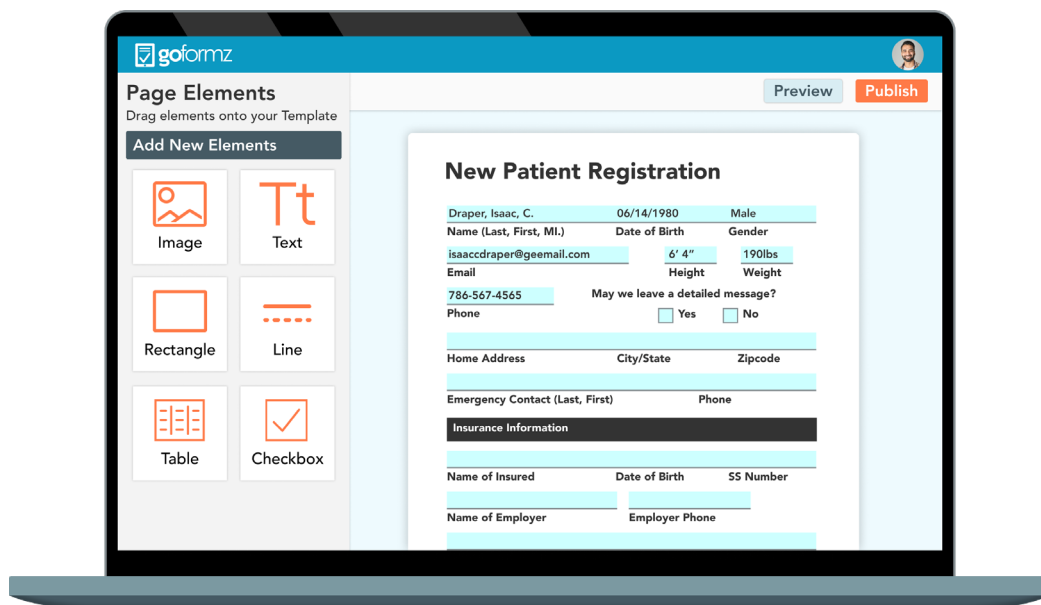eBook

How to Build a Form From Scratch in GoFormz

www.goformz.com

Table of Contents

Introduction: What is GoFormz?

The GoFormz platform empowers users to collect data using digital forms and instantly move that data throughout their organization. GoFormz is the only digital form solution capable of preserving the formatting of an existing paper form, enabling businesses to maintain cohesive branding, streamline user adoption, and uphold specific formatting requirements.

GoFormz provides a user-friendly, drag-and-drop digital form Template builder. This interface simplifies form-building, enabling users of all technological comfort levels to create digital form Templates tailored to their unique business needs.

Using the GoFormz mobile app or online experience, your digital forms can collect various data types, like signatures, barcodes, sketches, images, and easy-to-use form logic. With powerful automation features like Automated Workflows and Automatic Calculations, you can even eliminate tedious manual tasks and embrace streamlined processes.

In this eBook, we'll explore how you can use the GoFormz Template Editor to build a digital form from scratch.
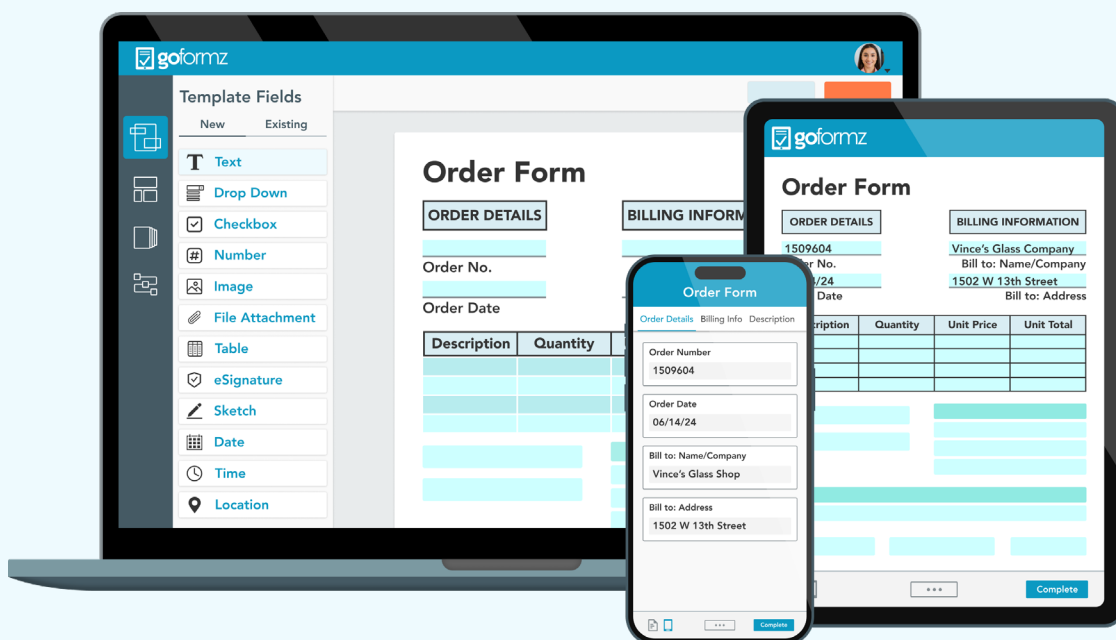
The GoFormz Template Editor

The GoFormz Template Editor, the platform's online form builder, consists of two editor tools: the Page Editor and the Field Editor. Use the Field Editor to add data fields to your Template and the Page Editor to manage your Template's background elements and design. Below, you will find a brief overview of both editors, as these tools will be used extensively later in this eBook.
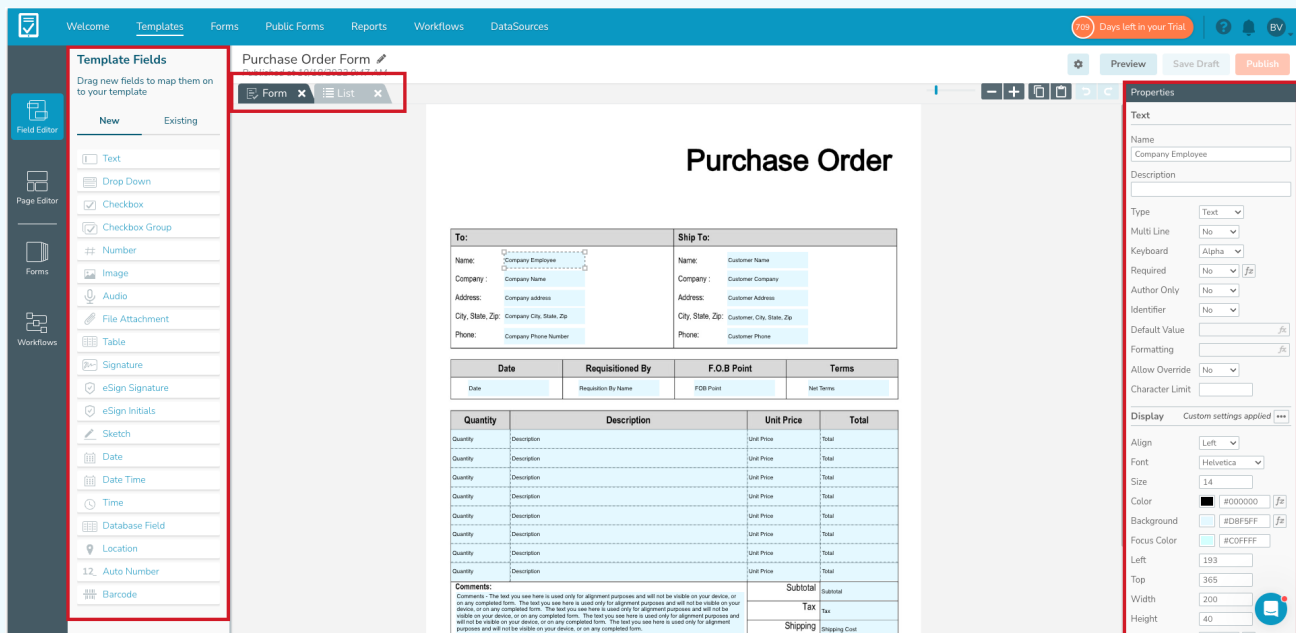

Overview of the Field Editor

To access the GoFormz Template Editor, click the 'Templates' tab in the top navigation bar of the GoFormz Web App. If you are building a form from scratch, you will land in the Field Editor tool by default. Here, you can add Template fields (like Text fields, Checkboxes, Images, and more) to your digital document. Template fields are located in the left-hand panel of the Field Editor and can easily be added to your Template via drag-and-drop. Also included in the Field Editor is the right-hand Properties Panel, which is used to manage each Template field's functionality, formatting, logic, and metadata.

Finally, at the center of the screen, just above your form Template in the Editor, you'll find two tab options: Form View and List View. These tabs allow you to toggle between different views, enabling you to create digital forms that meet your specific formatting requirements (mobile, tablet, and desktop versions).

Overview of the Page Editor

To access the Page Editor, select 'the Form View' option within the Field Editor and then click on 'Page Editor' in the left-hand menu bar. This will replace the Template Fields panel with the Page Elements panel on the left side of your screen, as seen below.
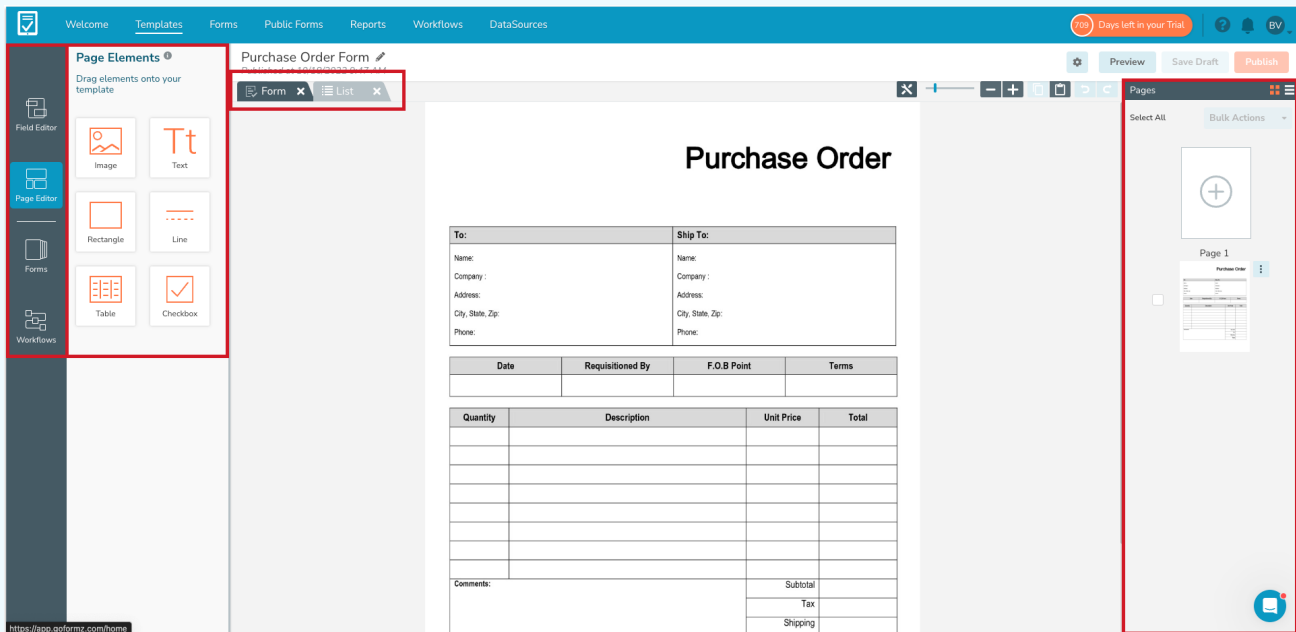
On the right side of the screen, the Properties Panel is replaced by the Pages Panel. Here, you can add blank pages, upload existing PDFs to your form template, and organize your Template pages as needed.

There are two ways to build a form from scratch using the Template Editor: using Page Elements in Form View, and in List View. This eBook will explore both approaches and how you can leverage them to build powerful digital forms.

"GoFormz has been the easiest digital adoption that we've gone through as a company." -
Stephen Goodson, IT and Business Manager, NQCranes

Two Ways To Build Forms in GoFormz

Use Case One: Building a Form Template from Scratch in Form View

Use Case Two: Building a Form Template from Scratch in List View

# Use Case One: Building a Form Template from Scratch in Form View

Creating a form Template from scratch using the GoFormz Page Editor is easy. For this use case, we will demonstrate how to build a form from scratch using a blank page and the Page Elements feature.

What are Page Elements?

Page Elements are the building blocks used to design and customize forms. They are the individual elements that can be added to the background of a form, allowing users to transform a blank form into a functional, interactive form.
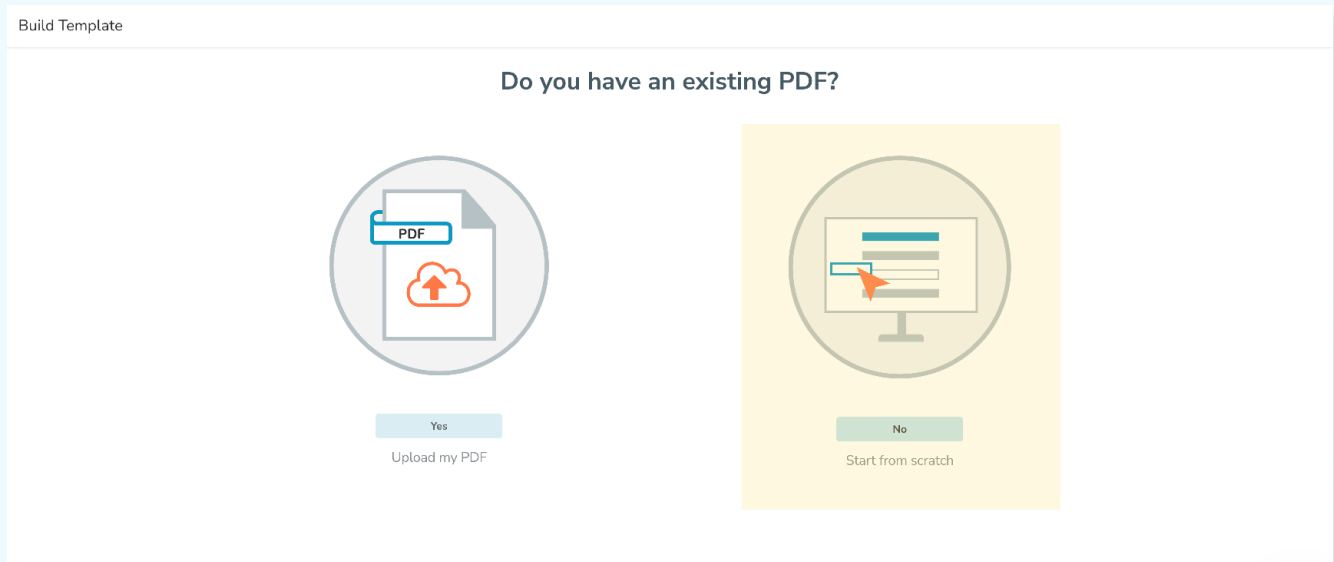
Page Elements include:

» **Images:** The Image element provides a space to add your business's logo, branding assets, or other imagery to your PDF background. Acceptable file types include: JPG, PNG, and SVG.

» **Text:** Use the Text element to add uneditable text to the background of your PDF. This is ideal for displaying information to your Form Users with text that cannot be altered or modified.

» **Rectangles:** Rectangle elements create designated spaces on your PDF background to help guide data field mapping. They are commonly used for text boxes, barcode locations, and image field placeholders.

» **Lines:** Use the Line element to segment your document, insert a space for a signature, or as a component for building larger elements.

» **Tables:** You can add rows and columns and adjust their size as needed for each Table element. When resizing the table, the rows and columns will retain their aspect ratio.

» **Checkboxes:** Checkboxes can be customized to be shaped as either squares or circles, and both options maintain a fixed aspect ratio for consistent formatting.

Image	Text	Rectangle	Line	Table	Checkbox
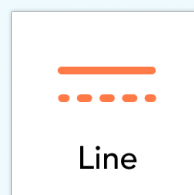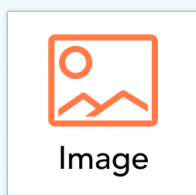
Building Your Form Template

Log in to GoFormz from a computer, and navigate to the Template Editor by selecting 'Build New Template' from the web application Homepage, or by selecting Templates from the menu bar, and then 'Build'.
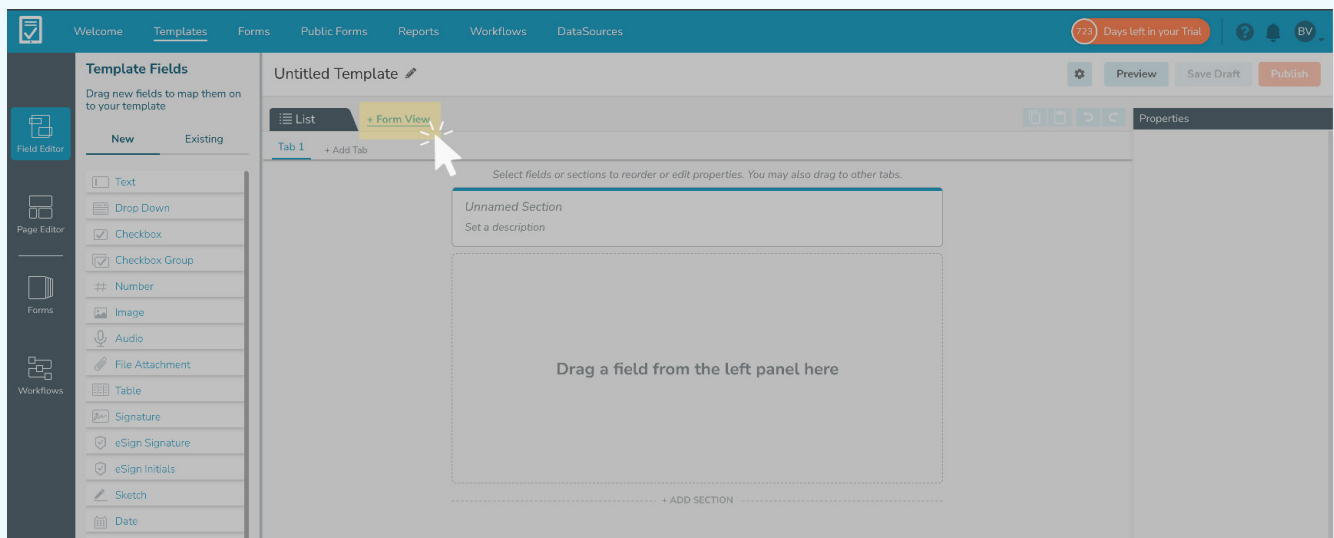

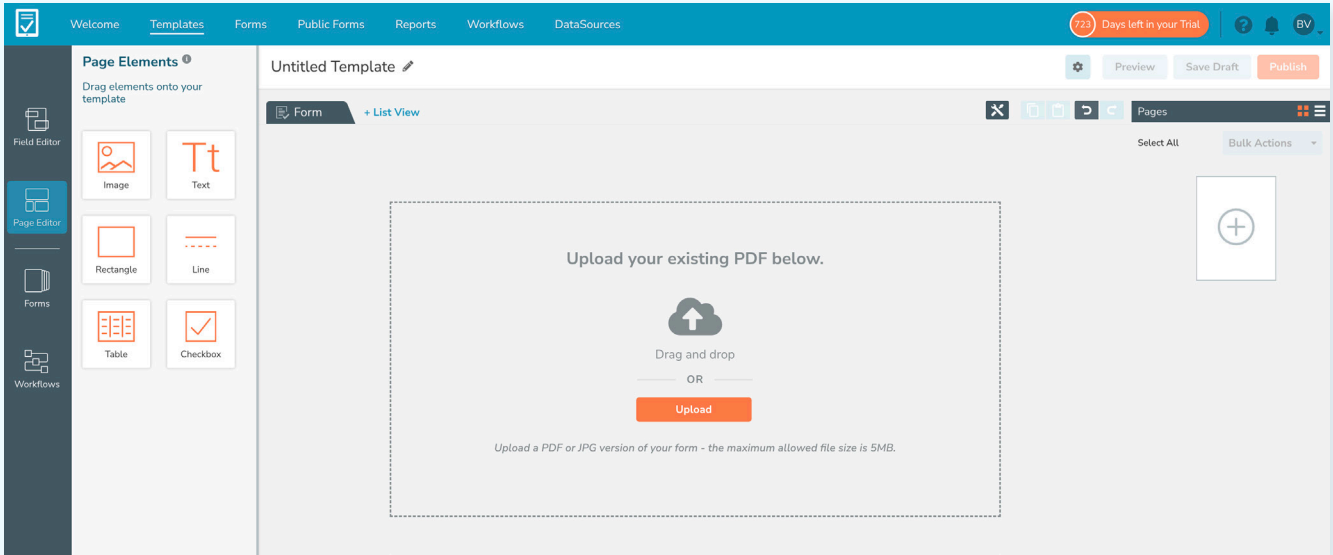You will be asked if you have an existing form PDF to upload. For this use case, select 'No', electing to start building your form Template from scratch.


When the Template Editor loads, select Form View. Then, select Page Editor from the left-hand menu bar.

In the Page Editor, you can upload a form PDF or add a blank page. For this example, we will navigate to the right-hand Pages panel and select the blank page option. When the 'Add Pages' window loads, select 'Insert a blank page'.

Now that we have our blank page added, name your form Template. For this example, we will call this form 'Page Elements Purchase Order.'
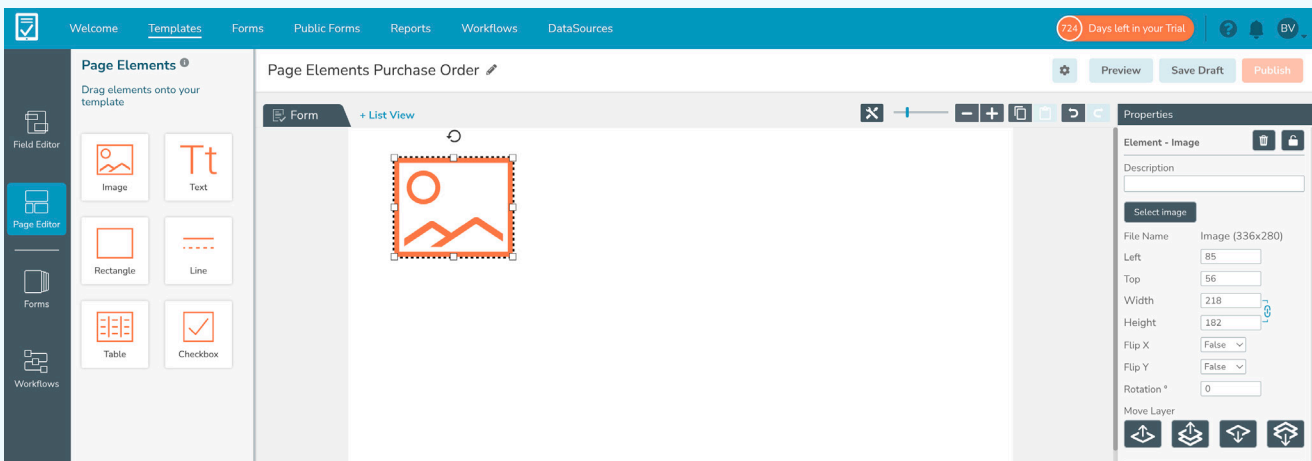

Next, we will begin adding Page Elements to build our form's design. First, drag and drop an Image element onto your desired location. For this example, we will place our Image element in the top left corner of the page and resize it to be smaller.
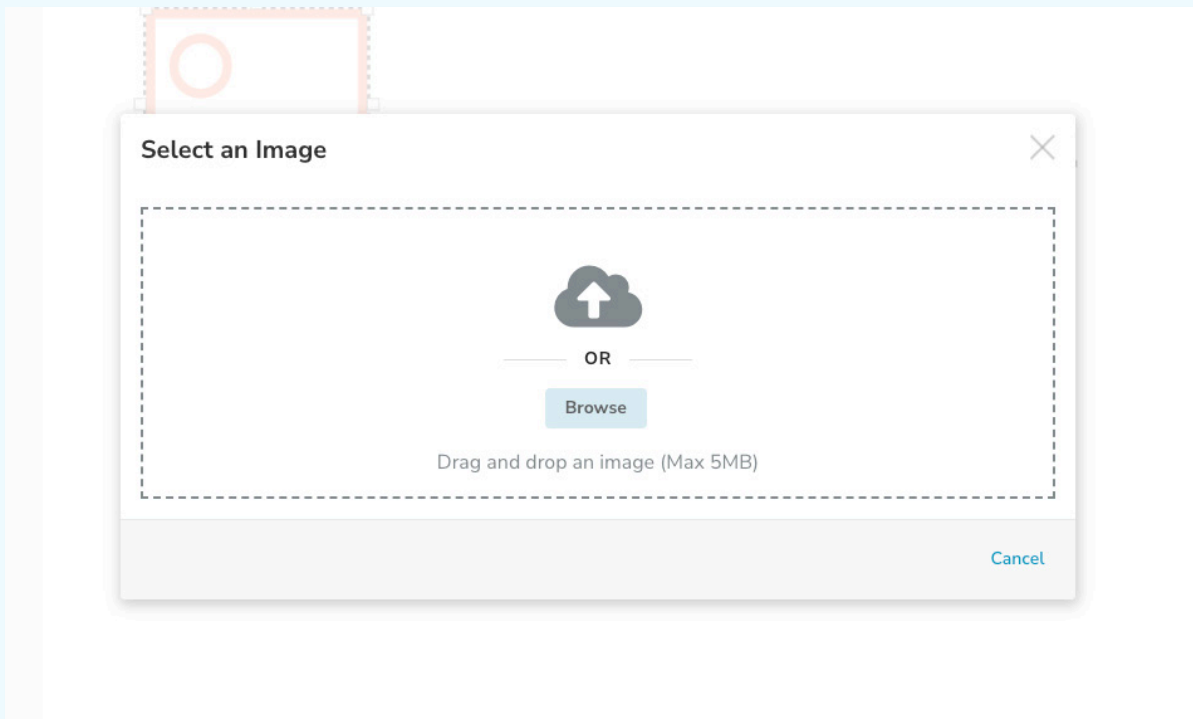
Now, navigate to the right side of the screen and find the Properties Panel. Here, you can upload the image you'd like to use by clicking 'Select Image.' For this example, we'll use the GoFormz logo, but feel free to upload any logo you want.
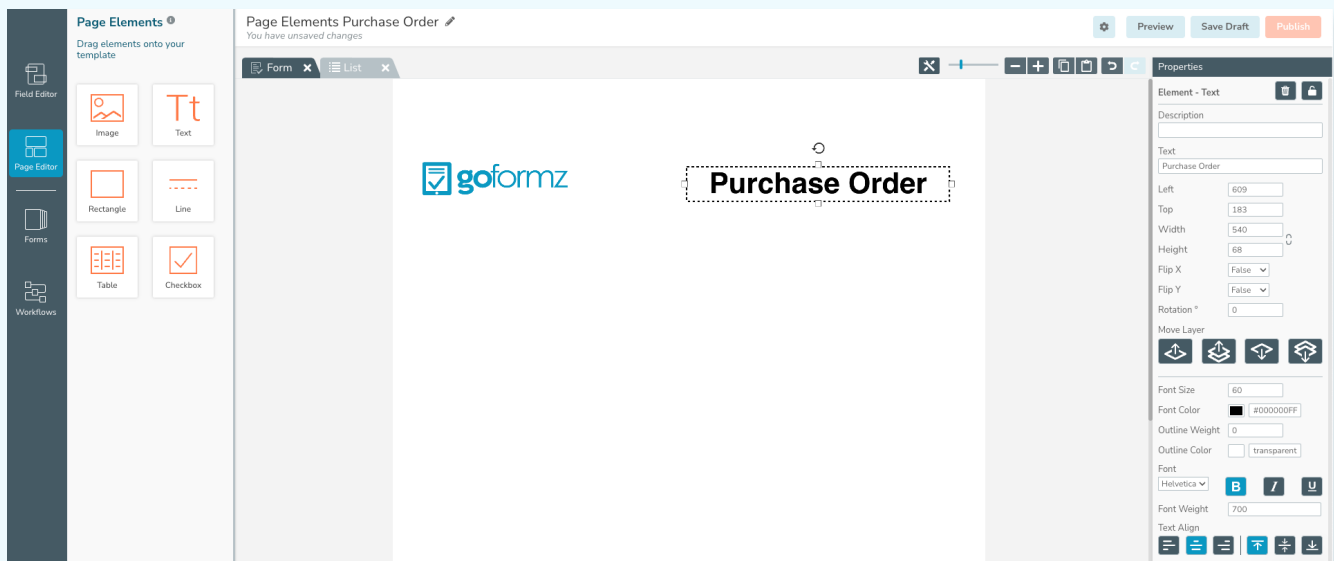
Now, add a title to your form Template using the Text element. Drag the Text element onto your form Template and double-click to edit. For this example, we'll use the title 'Purchase Order'. Then, navigate to the Properties Panel on the right side of the screen to customize the Text element to your meet preferences.
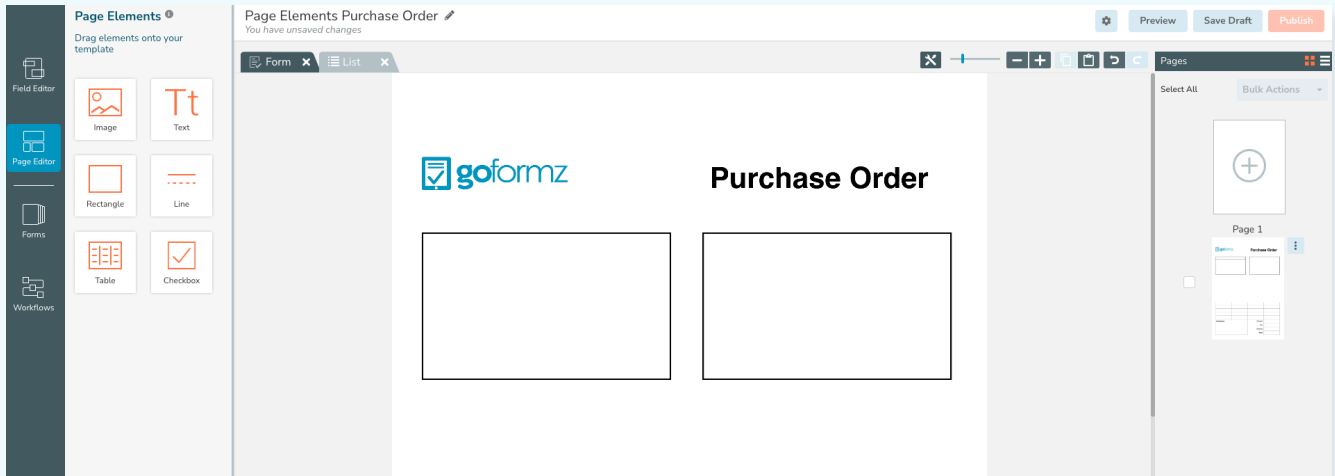
Next, drag and drop the Rectangle element onto your form template. Once positioned in the desired location, copy the Rectangle element and place the duplicate directly beside the original.
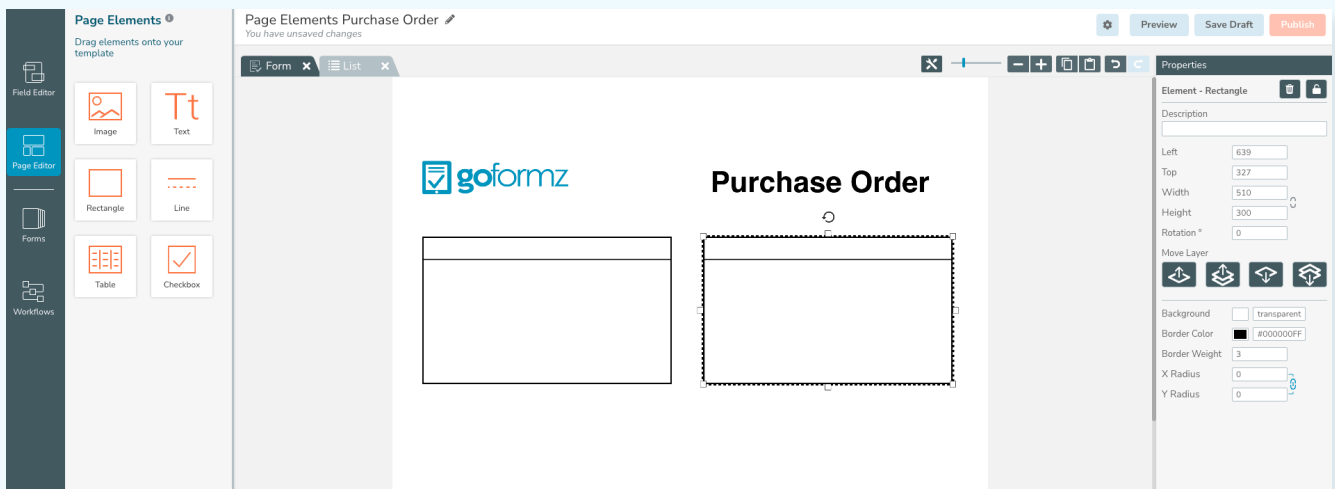
Now, we'll use the Line element to create a title section for each Rectangle element. Start by dragging and dropping a Line element onto the first Rectangle and positioning it to fit within the shape. Once the Line is properly placed, follow the same step in the same spot within the Rectangle on the right.
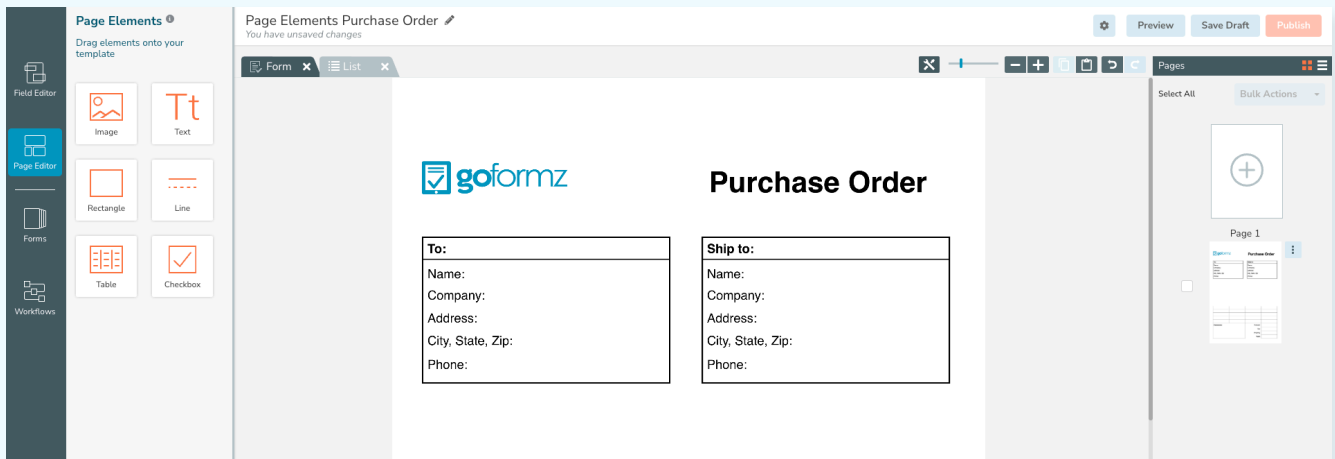
Now, let's add uneditable text to these two Rectangles. Since we're creating a Purchase Order from scratch, the left Rectangle will serve as the Company Information, while the right Rectangle will be used for Customer Information. Both Rectangles will include Text elements such as Name, Company Name, Address, and Phone Number. Since both Rectangles will include the same uneditable Text elements, once you finish the left Rectangle, you can simply copy those elements and drag them over to the right Rectangle.
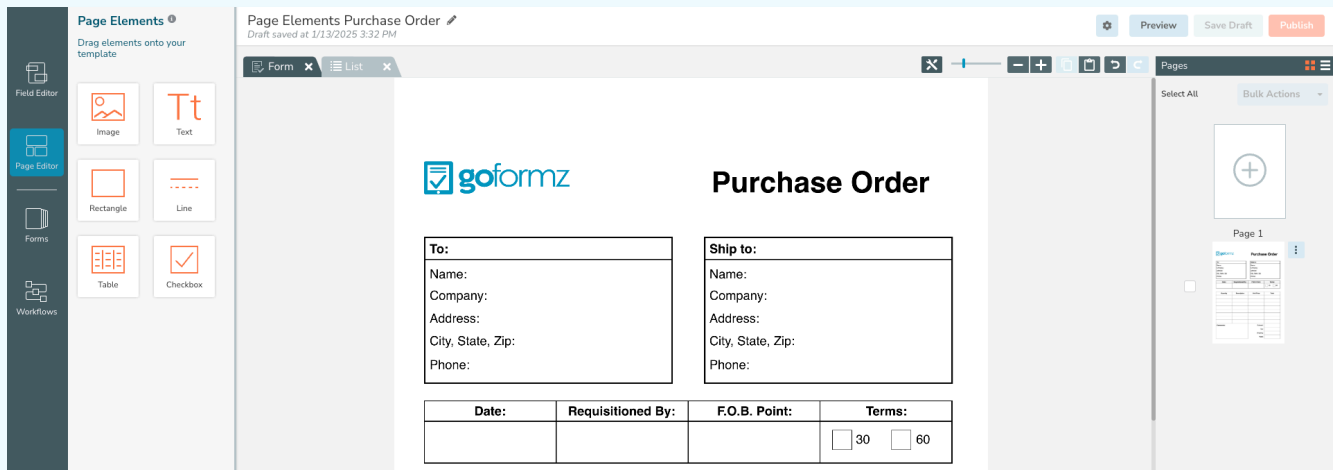

The next section of this form will require four Rectangle elements, one Line element, six Text elements, and two checkboxes. Start by placing the four Rectangle elements directly below the first section, aligning them side by side. Then, drag a Line element across all four Rectangles. Finally, add titles to each box. From left to right, the titles will be: Date, Requisitioned By, F.O.B Point, and Terms.

ProTip: To align the Text element perfectly within a Rectangle, right-click on the Text element and the Rectangle you're working with. This will open the Properties Panel, where you can use the Align Elements section to center the Text within the Rectangle, eliminating the need to align it manually by eye.

Finally, let's add two Checkbox elements to the Terms box. Drag and drop both Checkboxes into the Rectangle, leaving enough space for two Text elements next to each Checkbox. Next, add the Text elements and label them "30" and "60" to represent the net terms selection.
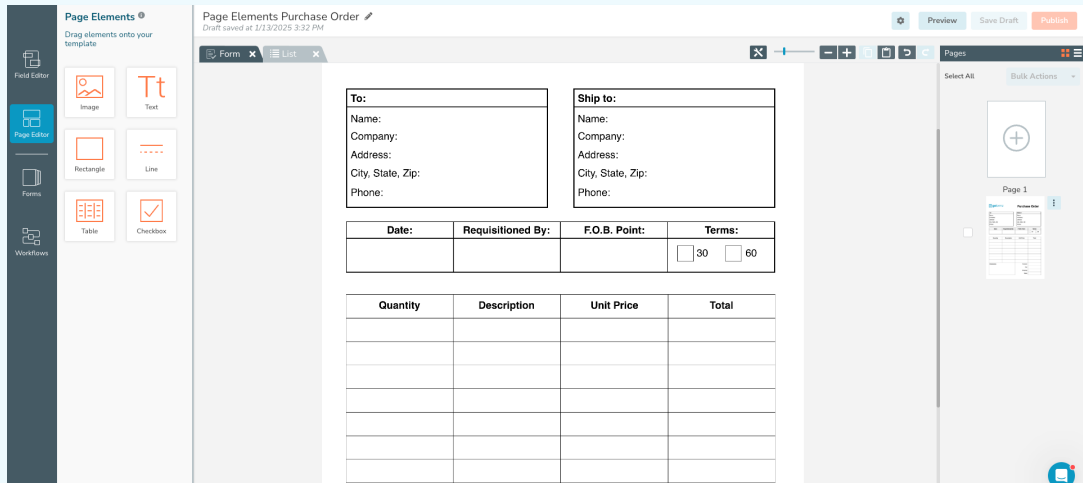
Now, we will add a Table element. Our Table will consist of four columns and nine rows. Start by dragging and dropping the Table element onto your digital form template. Then, navigate to the right panel to adjust the number of rows and columns as needed. Finally, use four Text elements to label each column. For this example, the column titles will be Quantity, Description, Unit Price, and Total.
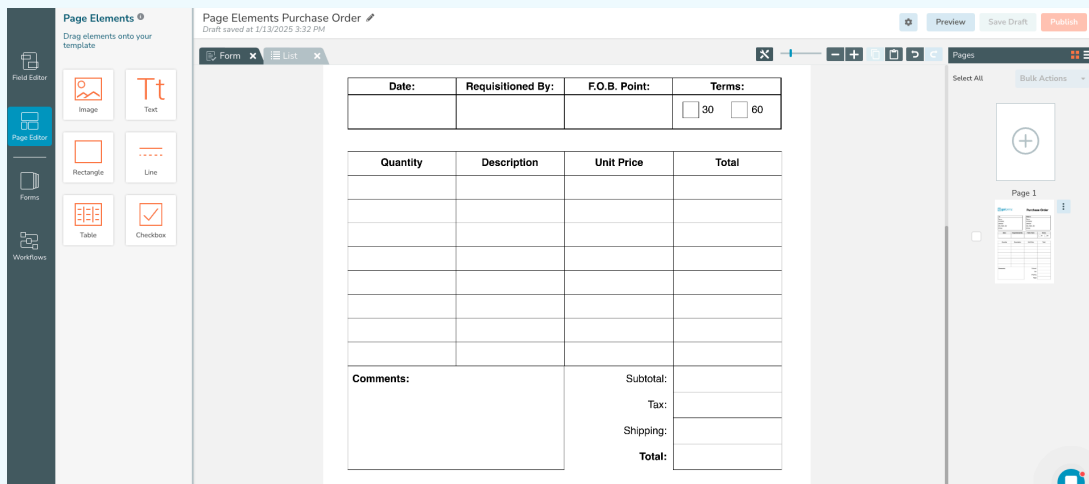
For the final section, we'll use five Rectangle elements and five Text elements. Begin by dragging a Rectangle element and aligning it with the last column of the Table element, placing it directly below. Once positioned, copy the Rectangle element three times and stack the duplicates directly below each other. Next, add a Text element to the left of each Rectangle and label them as follows: Subtotal, Tax, Shipping, and Total. Drag one more Rectangle element and align the element to the left side of the Table element. Make this element as big as you want. Then add in the final Text element and title it Comments. This will be your comments section of the Purchase Order.

Now that we have designed the background of ourdigital form Template, it's time to layer on our digital form fields in the Field Editor. Change from the Page Editor to the Field Editor using the menu baron the left side of the screen and the Page Elements will be replaced by the Template Fields panel.
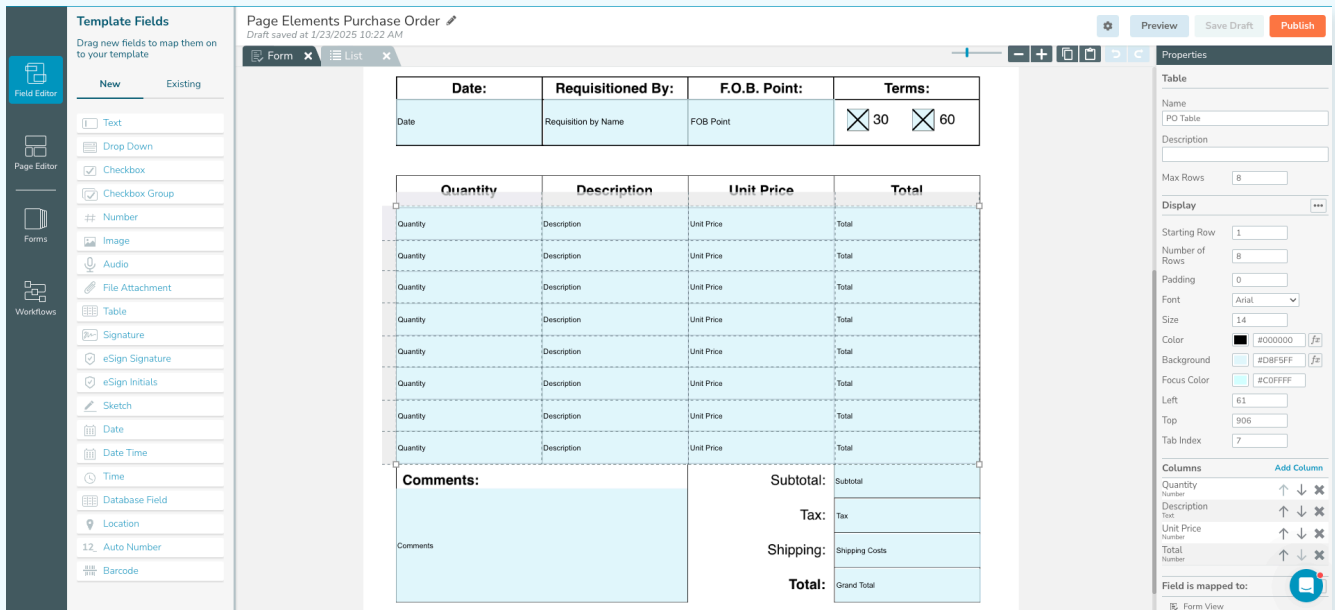
In the Field Editor, drag different field types onto your Template. You can easily resize and relocate them as needed. For this example, we'll add Text fields, Checkbox Groups, Date fields, and Table fields. **ProTip:** To learn more about adding data fields to your Template, visit our user guide.

In the right-hand Properties Panel, you can easily adjust your field's name, formatting, metadata, and logic. **ProTip:** To set up automatic calculations within your Table field, including calculating table totals, auto-filling form fields, database lookups, and more, refer to our Calculations eBook for step-by-step guidance on creating various calculation formulas.

Make sure to save your draft. Once everything is set, click Publish in the top-right corner of the screen. Congratulations! You've successfully built a new form Template entirely from scratch using the GoFormz Template Editor!

"GoFormz has become a central piece of our business model. We've had a really good experience with GoFormz and the simplicity of it is what attracted us and has kept us over time. It's something simple done really well." **- Jesse Ordonio, Operations Director, Rhino Cable Services**

Use Case Two: Building a Form Template from Scratch in List View

Another method for creating a form from scratch is using List View, an additional viewing mode users can leverage to enter data into a digital form.

What is List View?

List View is a small-screen optimized viewing mode that can be easily configured in the GoFormz Template Editor. While Form View maintains the original look and feel of your document, your Template's List View is formatted as an 'app-like' index of fields that can be easily filled out on smaller devices, like phones and tablets.
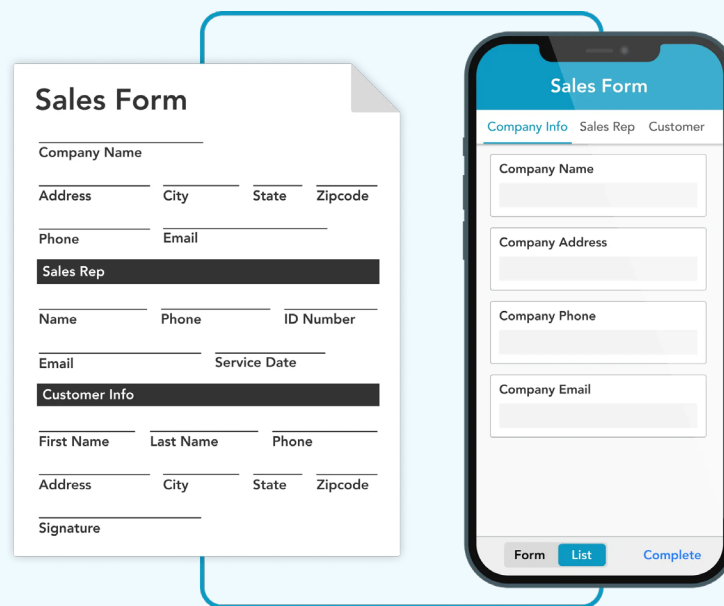

Building Your Form Template

To get started, return to the Templates section of the GoFormz web app and click 'Build' in the upper right-hand corner. Choose to build from scratch, and the Template Editor will open. In this example, we'll create a Purchase Order Form in List View.
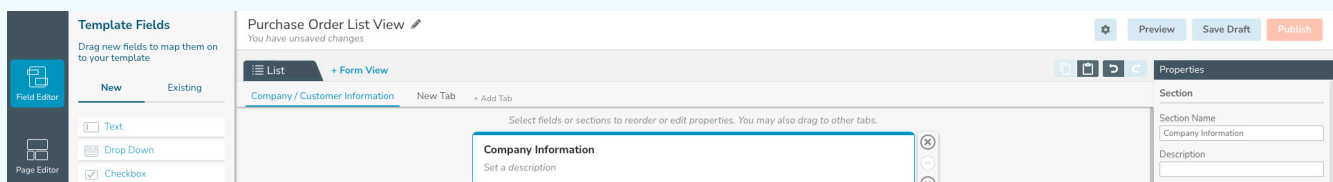
Begin by naming your form. For this example, we'll title it Purchase Order List View. Using the same format of the form we created using Form View and Page Elements, we will break our form into three sections: Company and Customer Information, PO Information, and Order Details.

In the top corner of the Field Editor, just below List, you'll find the Tabs section. By default, the tab will be named Tab 1. Let's rename this tab to Company / Customer Information to better organize our List View form. Next, select the first section (pre-loaded in your first tab) and name it 'Company Information.'
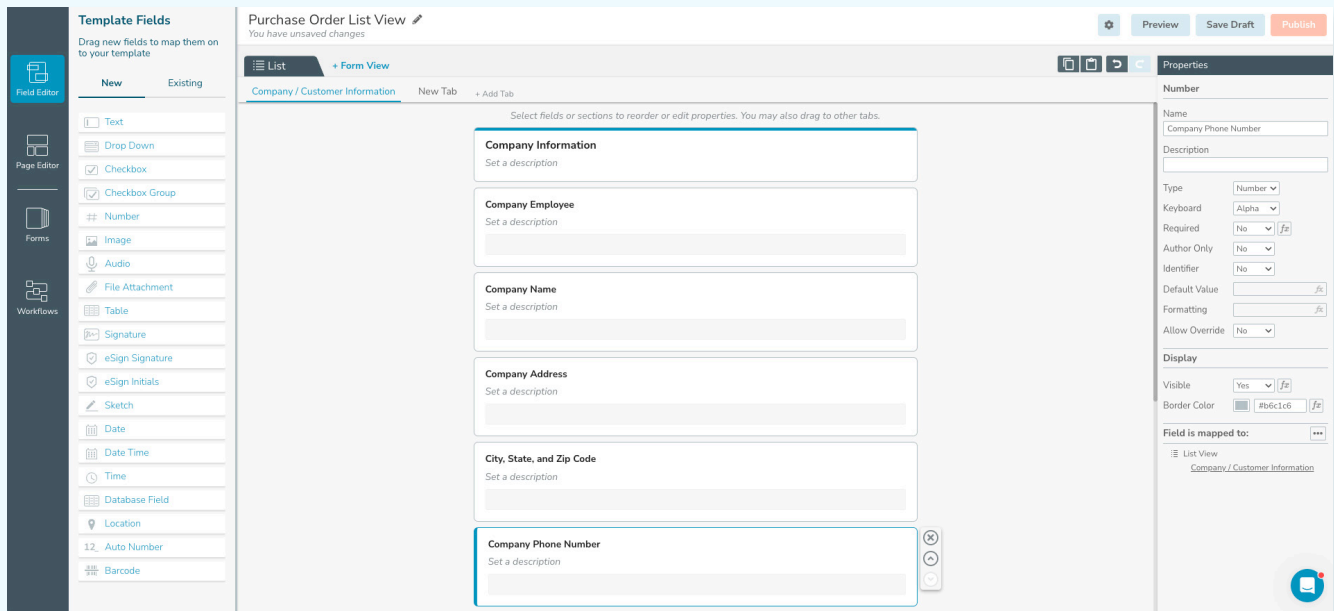

Drag and drop four Text fields and one Number field. Following the same approach as in the Page Elements form build, we'll label these fields as Company Employee, Company Name, Company Address, City, State, Zip Code, and Company Phone Number.
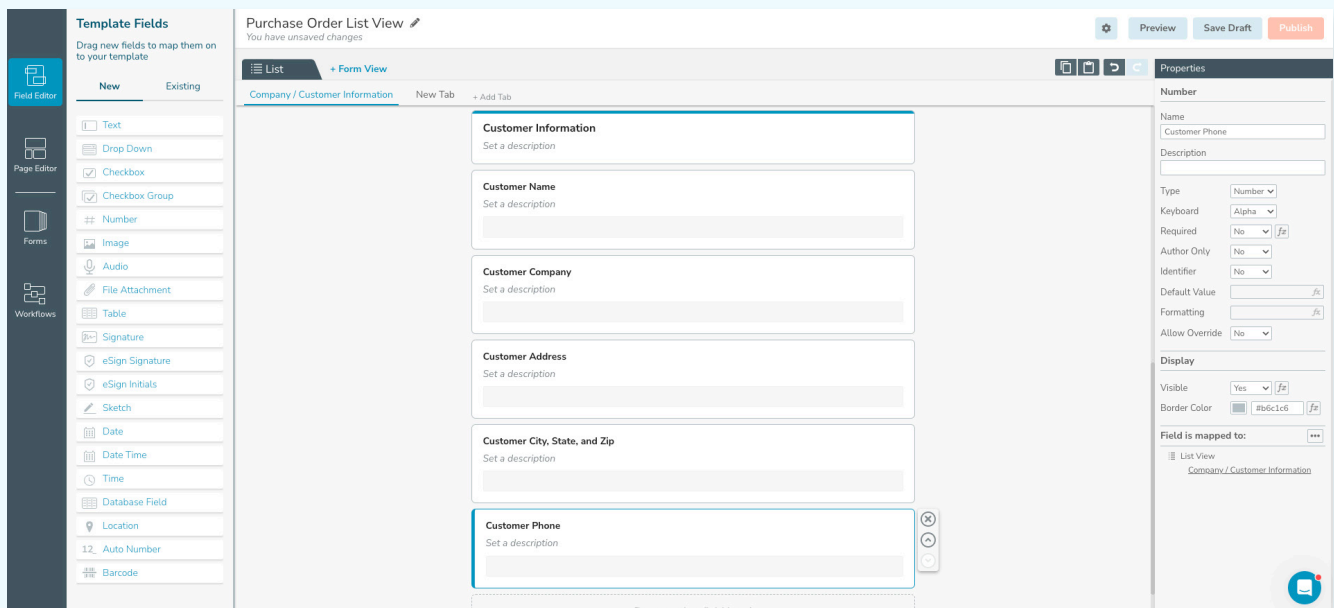
Next, we'll add another section to this tab. Click the '+Add Section' line below your last form field and name the new section Customer Information. Sections are a great way to organize data collection within the List View functionality.

Just as we did in the Company Information section, we'll do the same for the Customer Information section. Drag four Text fields and one Number field into the Customer Information section and title them the following: Customer Name, Customer Company, Customer Address, Customer City, State, and Zip, and Customer Phone.
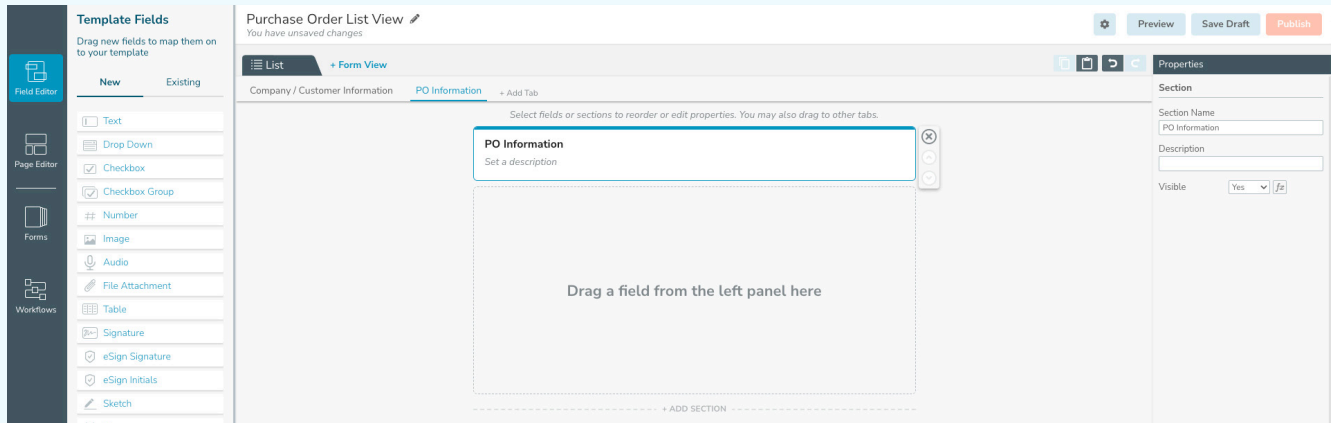
Now, let's add a new tab and title it PO Information. This section will be brief, containing only four form fields.
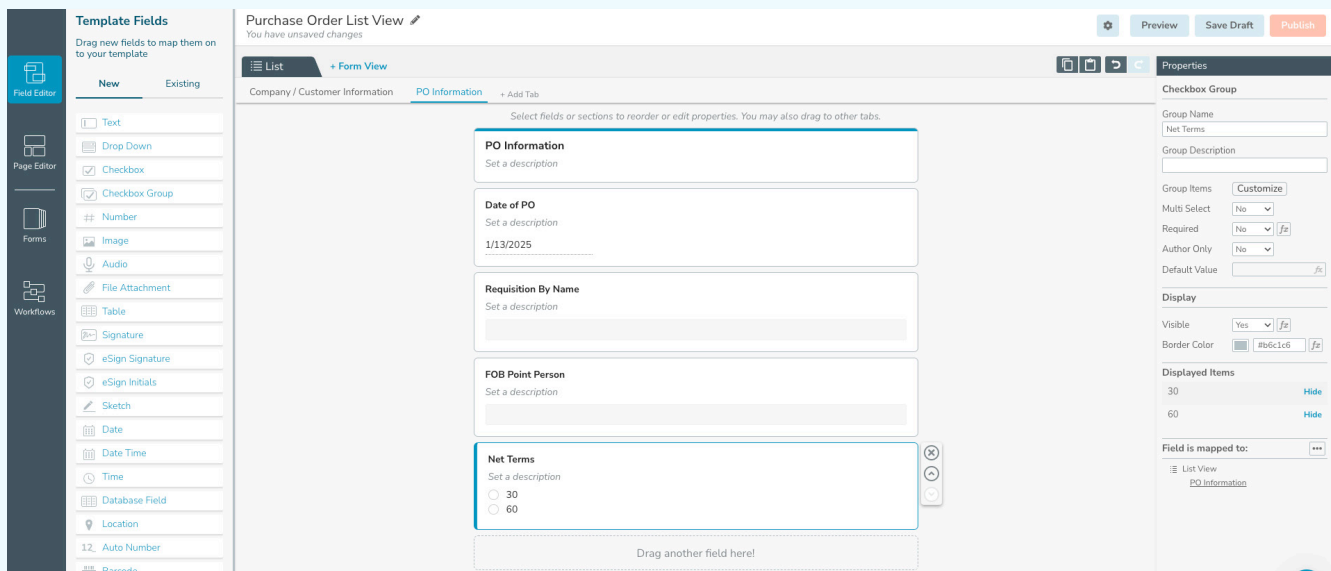
Drag and drop a Date field and title it 'Date of PO' to capture the submission date of the Purchase Order. Next, add a Text field and title it 'Requisitioned By Name,' followed by another Text field titled FOB Point Person. Finally, drag and drop a Checkbox Group and name it Net Terms. This group will include two options: 30 days and 60 days.

With the Checkbox Group selected, navigate to the Properties Panel and click Customize. Here, you'll add the two checkbox options. Rename Checkbox 1 to 30, then add another option and rename it 60. The final step is to click 'Show' in the Available Items section of the Properties Panel so the Checkbox Group displays both options.
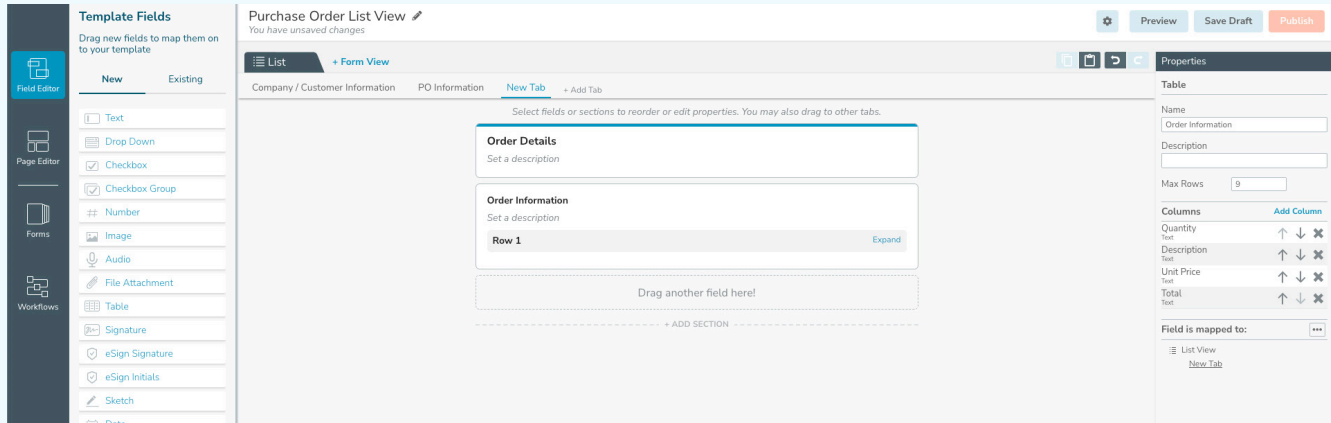

Let's finish the form by adding the final tab. Create a new tab and name it Order Details. Then, name the section Order Details as well. Next, drag and drop a Table field onto the form and title the field 'Order Information.' For this example, the table will have a maximum of 9 rows and 4 columns. Click on each individual Column in the Properties Panel and name each column. Use the following naming convention:

Column 1 = Quantity
Column 2 = Description
Column 3 = Unit Price
Column 4 = Total

Finally, let's add the remaining form fields. Drag and drop four Number fields and title them as follows: Subtotal, Tax, Shipping Cost, and Grand Total. These fields will calculate the Grand Total based on the values inputted in the Table. Learn more about calculations here >

Next, drag and drop a Text field, title it Comments, and go to the Properties Panel to change the Multi-Line value to Yes. This will allow users to enter comments in the form using multiple lines if needed.

Be sure to save your draft and test your digital form template before submitting it to go live. Once the Test it complete, Publish, and you have now built a form from scratch using the List View functionality of GoFormz.
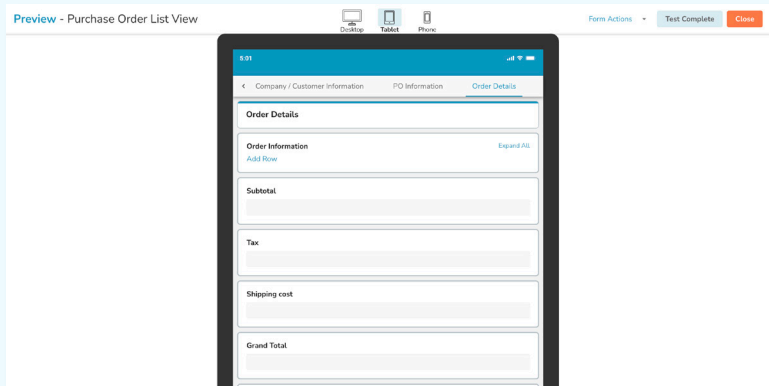
Frequently Asked Questions

1. What tier are Page Elements and List View available in GoFormz?

Both Page Elements and List View are available at all subscription tiers!

2. Can I use Page Elements and List View in one form?

Yes! If you plan to use both views, we recommend you begin building your template in Form View (using Page Elements and Fields) before building your List View.

3. When should I use Page Elements vs List View and vice versa?

Page Elements are best used for designing the Form View version of your digital form, while List View is preferred for an app-like viewing experience (perfect for smaller screens).

4. Can I use List View in the GoFormz Web App?

Yes! List View can be used in both mobile and web apps.

Additional Resources

If you found this eBook helpful but are looking for additional information to kickstart your template form building, contact our team or check out the helpful resources listed below:

Support Documentation

- » Template Editor Navigation
- » Page Editor Navigation
- » Page Elements Overview
- » Build a List View for Your Template

Helpful Blogs

Page Elements

- » Explore the New GoFormz Page Elements Features
- » Add Page Elements to Your Form Template
- » ProTip: Add a Logo to Your Form Template
- » ProTip: Add Uneditable Text to Your Forms

List View

- » 3 Ways to Optimize Your Form's List View
- » What is the List View Form Builder

How GoFormz Users Are Using These Features to Build Forms

- » Case Study – Cooper Oates Air Conditioning and Mobile HVAC Forms
- » Case Study – Overland Pipeline and Mobile Oil & Gas Forms
- » Case Study – Reynolds Machinery and Mobile Installation Forms
- » Case Study – Aldridge Electric and Mobile Electrical Forms
- » Case Study – Industrial Specialty Services and Mobile Oil and Gas Forms