

QuikOne FSM

User Guide – Digital Forms & Checklists

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10. Digital Forms & Checklists

10.1 Create Forms

The screenshot displays the 'Form Page' interface, which is used for creating and configuring digital forms. The interface is divided into several sections:

- Form Page Header:** Includes fields for 'Form Name', 'Form Code', 'Form Type', 'Branch', and 'Business', each with a dropdown menu. There is also a 'Set as Default' checkbox.
- Form Elements:** A sidebar on the left containing various form elements categorized under 'Input', 'Choice', 'Specific', 'Date', 'Drop Down', and 'Tags'. Each category has several options (e.g., Text, Password, Email, Radio, Checkbox, etc.).
- Fields Configuration:** A central panel with tabs for 'Default' and 'Style'. The 'Default' tab shows fields for 'Label', 'Name', 'Placeholder', 'Field As Dynamic', 'Control', and 'Group Array Name'. The 'Style' tab shows fields for 'Height', 'Group Class', 'Input Class', 'Label Class', 'Error Class', 'Style', 'Table Column Id', 'View Order Id', 'Form Order Id', and 'Mobile Bind Next'.
- Form Layout:** A large area on the right for visualizing the form layout. It contains a placeholder text 'Add fields to preview form' and buttons for 'Cancel' and 'Save'.

The **Digital Forms & Checklists** module enables organizations to create configurable digital forms that can be used across various business processes. Administrators can design forms by dragging and arranging fields, configure field properties, and publish reusable templates without requiring any code changes.

The **Create Forms** feature allows administrators to build custom forms using a drag-and-drop form designer. These forms can be configured for different business functions such as lead capture, customer onboarding, and requirement collection.

Navigation

Digital Forms → Create Form

Overview

The Form Builder provides an intuitive interface for designing digital forms. Users can:

- Create new form templates.
- Drag and drop form elements.
- Configure field properties.
- Organize the form layout.
- Save reusable form templates.
- Set a form as the default for a business process.

Form Information

Before designing the form, enter the following information:

Field	Description
Form Name	Name of the form.
Form Code	Unique identifier for the form.
Form Type	Business purpose of the form.
Branch	Branch where the form will be used.
Business	Business unit associated with the form.
Set as Default	Marks the form as the default template for the selected form type.

Form Types

The system currently supports the following form types:

Lead Form

Used for capturing information from prospective customers or sales leads.

Typical usage includes:

- Lead generation
- Marketing campaigns
- Sales enquiries
- Website contact forms

Requirement Form

Used for collecting customer requirements before preparing quotations or creating work orders.

Typical usage includes:

- Site inspection
- Requirement gathering
- Technical assessments
- Survey reports

Customer Form

Used for capturing customer information during customer registration or onboarding.

Typical usage includes:

- Customer registration
- Customer profile creation
- Contact information
- Business details

Form Elements

The Form Builder provides a comprehensive set of reusable controls.

Input Controls

- Text
- Email
- Password
- Number
- URL
- Telephone

Choice Controls

- Radio Button
- Checkbox

Text Controls

- Text Area
- Rich Text Editor

Upload Controls

- File Upload
- Signature

Date Controls

- Date
- Time
- Date & Time

Selection Controls

- Single Select
- Multi Select

Layout Controls

- Input Group Prefix
- Input Group Append

Content Controls

- Heading
- Paragraph
- Horizontal Rule
- Line Break

Form Layout

Fields can be added to the form layout using drag-and-drop.

Users can:

- Insert new fields.
- Rearrange field positions.
- Organize sections.

- Preview the final layout before saving.

Save Form

After completing the configuration:

1. Enter the form details.
2. Add the required fields.
3. Configure field properties.
4. Arrange the layout.
5. Save the form.

The form becomes available for use within the selected business process.

10.2 Dynamic Fields

Dynamic Fields allow administrators to configure the behaviour, appearance, and validation rules of each form element without modifying application code.

Field Configuration

Each field can be configured with the following properties:

Property	Description
Label	Display name shown to users.
Name	Internal field name used by the application.
Placeholder	Hint text displayed inside the field.
Field as Dynamic	Enables dynamic behaviour for the field.
Control	Defines the control type or rendering behaviour.
Group Array Name	Groups related fields together for processing.

Style Configuration

The appearance of each field can be customized using style properties.

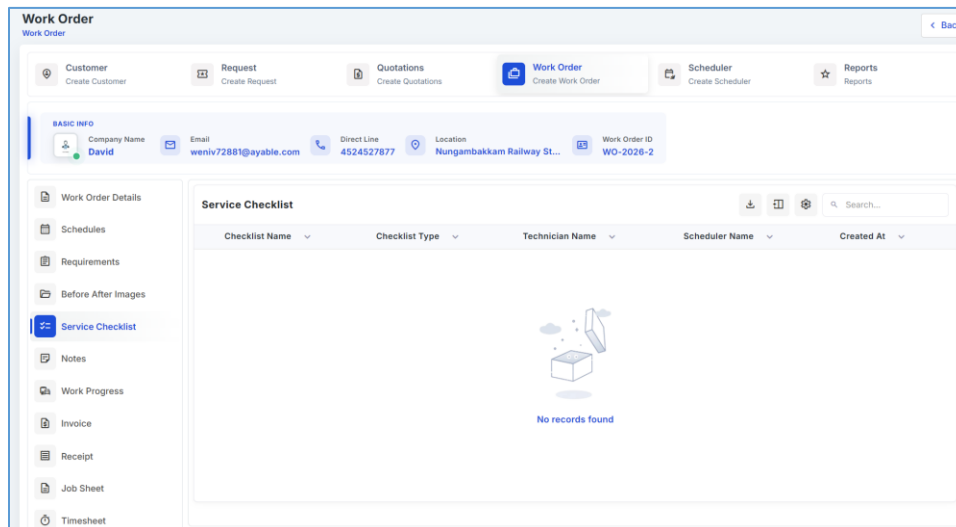
Available options include:

- Height
- Group CSS Class

- Input CSS Class
- Label CSS Class
- Error CSS Class
- Custom Style
- Table Column ID
- View Order ID
- Form Order ID
- Mobile Bind Next

These settings help maintain a consistent user interface across different devices and screen sizes.

10.3 Service Checklist



The **Service Checklist** feature enables organizations to define and manage checklists associated with work orders and scheduled service activities. Checklists ensure that technicians follow standardized procedures during service execution, improving service quality, compliance, and consistency.

Navigation

Work Order → Service Checklist

Overview

Service Checklists provide technicians with a structured list of tasks that must be completed before, during, or after performing a service. Checklists can be configured based on the service type or work order requirements and are accessible from the associated work order.

Each checklist created for a work order is recorded and can be reviewed for audit and quality assurance purposes.

Checklist Information

The Service Checklist list displays the following information:

Field	Description
Checklist Name	Name of the checklist assigned to the work order.
Checklist Type	Type of checklist (e.g., Pre-Service, Post-Service, Safety).
Technician Name	Technician responsible for completing the checklist.
Scheduler Name	Schedule associated with the checklist.
Created At	Date and time when the checklist was created.

Checklist Types

Organizations can create different types of checklists depending on the service process, including:

- Pre-Service Checklist
- Post-Service Checklist
- Installation Checklist
- Inspection Checklist
- Preventive Maintenance Checklist
- Safety Checklist
- Quality Assurance Checklist
- Customer Handover Checklist

Checklist Execution

During service execution, technicians can:

- Open the assigned checklist.
- Complete each checklist item.
- Record observations or comments.
- Capture supporting information where required.
- Mark checklist items as completed.
- Submit the completed checklist for review.

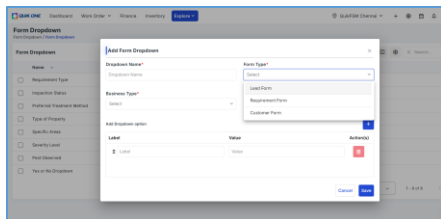
The completed checklist becomes part of the work order history.

Search and Filter

Users can locate checklists using the available search functionality and sort the list by:

- Checklist Name
- Checklist Type
- Technician Name
- Scheduler Name
- Creation Date

10.4 Form Drop Down



Form Dropdown Management

The **Form Dropdown Management** feature allows administrators to create and maintain reusable dropdown lists that can be used across digital forms. Dropdown values are associated with a specific form type and business type, ensuring consistent data entry and standardized options throughout the application.

Navigation

Explore → Form Dropdown

Overview

Form Dropdown Management enables administrators to define custom dropdown fields and their selectable values without modifying application code. These dropdowns can then be referenced by dynamic forms created in the Digital Forms module.

Create a Dropdown

To create a new dropdown:

1. Navigate to **Form Dropdown**.
2. Click **Add**.
3. Enter the **Dropdown Name**.
4. Select the **Form Type**.
5. Select the **Business Type**.
6. Add one or more dropdown options.
7. Save the dropdown.

The dropdown becomes available for use in the selected form type.

Dropdown Information

Field	Description
Dropdown Name	Name of the reusable dropdown list.
Form Type	Form in which the dropdown will be available.
Business Type	Business unit or service category associated with the dropdown.

Supported Form Types

Dropdowns can be created for the following form types:

- **Lead Form** – Used during lead capture and enquiry management.
- **Requirement Form** – Used to collect customer requirements during inspections or surveys.
- **Customer Form** – Used for customer registration and profile information.

Dropdown Options

Each dropdown consists of one or more selectable values.

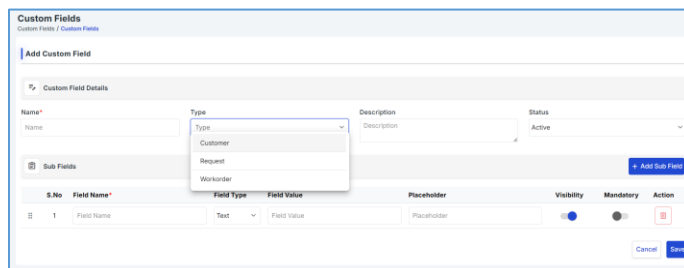
For every option, administrators specify:

Field	Description
Label	Display text shown to users.
Value	Internal value stored by the application.

Administrators can:

- Add multiple options.
- Edit existing options.
- Delete options.
- Reorder options using drag-and-drop.

10.5 Customer Fields



The screenshot displays the 'Custom Fields' management interface. At the top, there's a breadcrumb 'Custom Fields / Custom Fields' and a button 'Add Custom Field'. Below this is a 'Custom Field Details' section with form fields for 'Name*' (with a sub-label 'Name'), 'Type' (a dropdown menu currently showing 'Customer' and options for 'Request' and 'Workorder'), 'Description', and 'Status' (set to 'Active'). A 'Sub Fields' section is visible below, containing a table with columns: 'S.No', 'Field Name*', 'Field Type', 'Field Value', 'Placeholder', 'Visibility', 'Mandatory', and 'Action'. The table has one row with '1', 'Field Name', 'Text', 'Field Value', 'Placeholder', and icons for visibility, mandatory status, and an action menu. At the bottom right of the form are 'Cancel' and 'Save' buttons.

The **Custom Fields** feature enables administrators to create additional user-defined fields for Customers, Requests, and Work Orders without modifying the application. This allows organizations to capture business-specific information that is not included in the standard system fields.

Navigation

Explore → Custom Fields

Overview

Custom Fields provide a flexible mechanism for extending standard records with organization-specific information. Administrators can define custom fields, configure their properties, and determine whether they are visible or mandatory for users.

The configured fields are automatically displayed in the corresponding module based on the selected type.

Create a Custom Field

To create a custom field:

1. Navigate to **Custom Fields**.
2. Enter the **Custom Field Name**.
3. Select the **Type**.
4. Provide an optional **Description**.
5. Select the **Status**.
6. Click **Add Sub Field** to define one or more fields.
7. Configure the field properties.
8. Save the configuration.

Custom Field Information

Field	Description
Name	Name of the custom field configuration.
Type	Module where the custom field will be displayed.
Description	Optional description explaining the purpose of the custom field.
Status	Indicates whether the custom field configuration is Active or Inactive.

Supported Types

Custom fields can be created for the following modules:

- **Customer**

- **Request**
- **Work Order**

Each configuration is displayed only within its selected module.

Sub Fields

A custom field configuration can contain one or more sub fields.

For each sub field, administrators define:

Multiple sub fields can be added within the same configuration.

Field	Description
Field Name	Label displayed to users.
Field Type	Type of input control.
Field Value	Default value or predefined values, where applicable.
Placeholder	Hint text displayed before data entry.
Visibility	Controls whether the field is displayed to users.
Mandatory	Specifies whether the field is required before saving the record.

Supported Field Types

Depending on the business requirement, administrators can configure different field types, including:

- Text
- Text Area
- Number
- Email
- Date
- Time
- Date & Time
- Checkbox
- Radio Button
- Single Select Dropdown
- Multi Select Dropdown

- File Upload
- Signature

The available field types may vary based on system configuration.