Welcome to the Fleet Complete Video Series

AT&T FLEET COMPLETE FORMS **R2.2.4**

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By the end of this module, you will be able to…

- Add User accounts in the Web application
- Build a custom Form
- Add Forms to a Resource record
- Dispatch a Form to a Resource via FC Web or Pronto Forms Web
- View the Form in the mobile application

2

Overview:

- We will be covering the following list of topics in this module today.
- Read the slide.

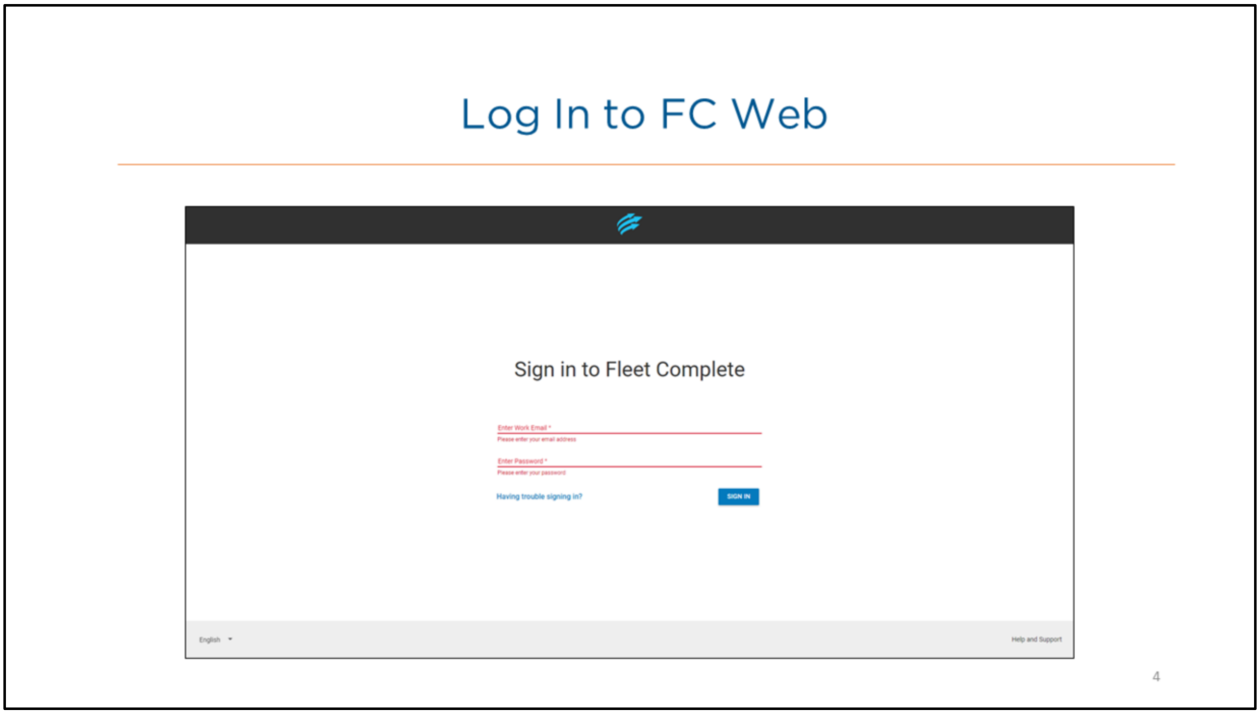
Overview

Pronto Forms give's Administrators the ability to create custom electronic forms, to provide important information on the task. The forms can be dispatched by a user, and viewed by a resource from the mobile application.

For Example, the administrator can direct a technician to a customer location with instructions on the work to be performed on-site. This can help mobile resources arrive prepared for their next site visit, allowing them to get right to the central task at hand.

Overview:

- Read the slide.



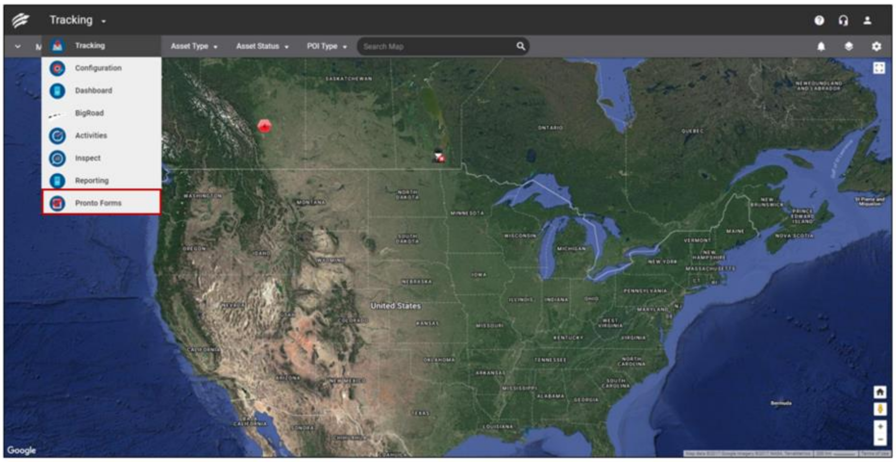
Overview:

- The first step will be to log in to FC Web.
- To do so, from your desktop in the address bar, type the Web address.
- On the Login screen you will be required to provide your User Account credentials.
- If you are seeing a message saying your account has been locked, you will need to contact your Fleet Complete Administrator for access.

Steps: Logging in to FC Web

1. From your desktop in the address bar, type in the web address https://web.fleetcomplete.com
2. On the *Login* screen in the *Email* field, type your *email address*
3. In the *Password* field, type your password information
4. From the *Language* drop down menu, select a language *(Spanish, French or English)*
5. To accept the *End User License Agreement for Fleet Complete*, read the content and click the **AGREE** button

Accessing Pronto Forms



Overview:

- Once you have logged in to FC Web, you are automatically navigated to the Tracking screen.
- On this screen you can now access the Pronto Forms functionality from the Main menu.

Steps: accessing Pronto Forms from FC Web

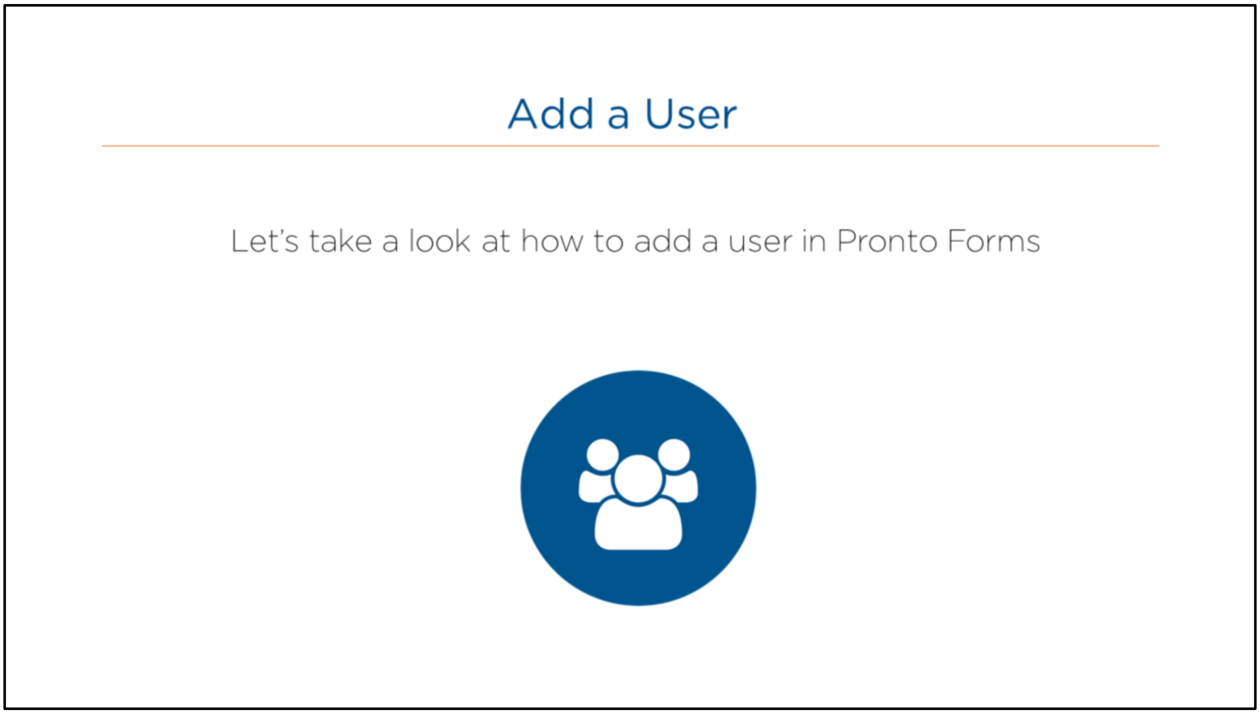
1. On the upper left side of the tracking screen, click the **Main Menu** dropdown arrow
2. Select **Pronto Forms**

Overview:

- You will be directed to the Pronto Forms Login screen, where you will be required to provide your username and password that was sent in the welcome email to your email address by your **Administrator**.

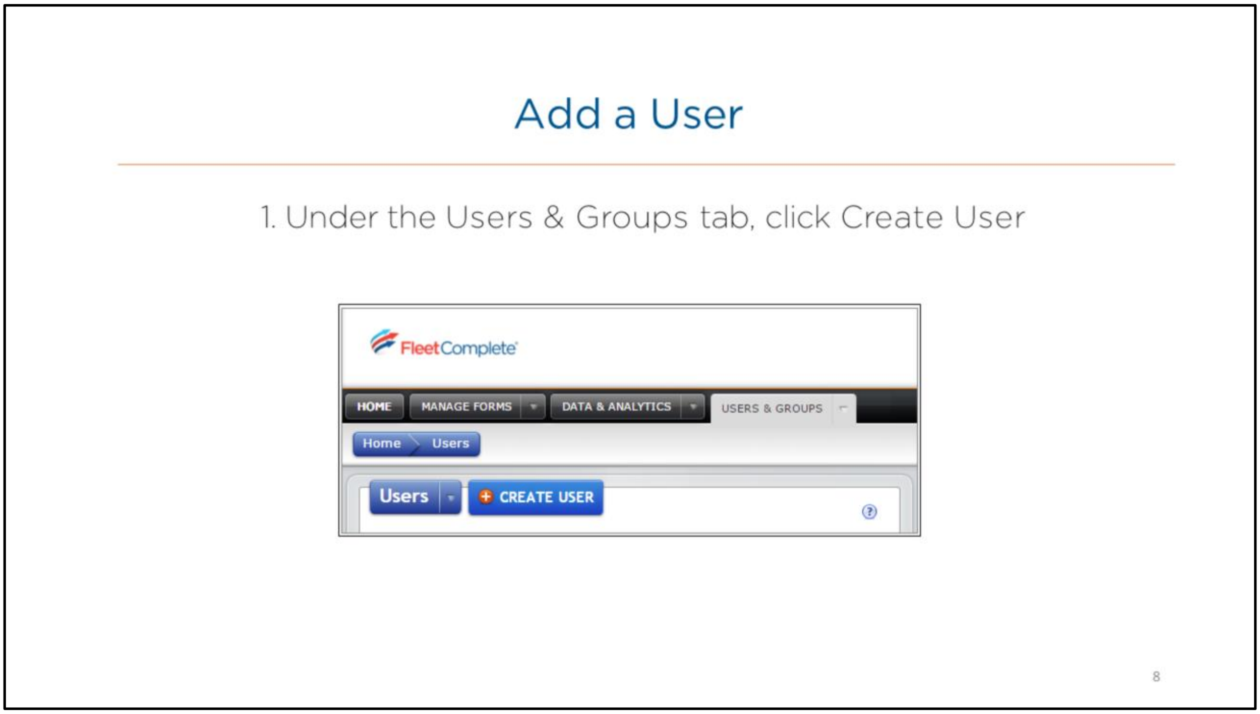
Steps: Logging in to the Pronto Forms Web application

1. On the *Login* screen in the *Username* field, type your *Username*
2. In the *Password* field, type your password information
3. Click the **Login** button



Overview:

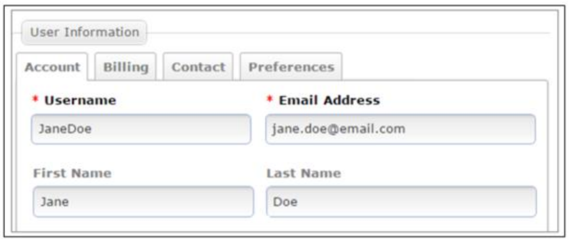
- Read the slide.



Overview:
- To create custom forms, the administrator must add users to the web application.
- Read the slide.

Add a User

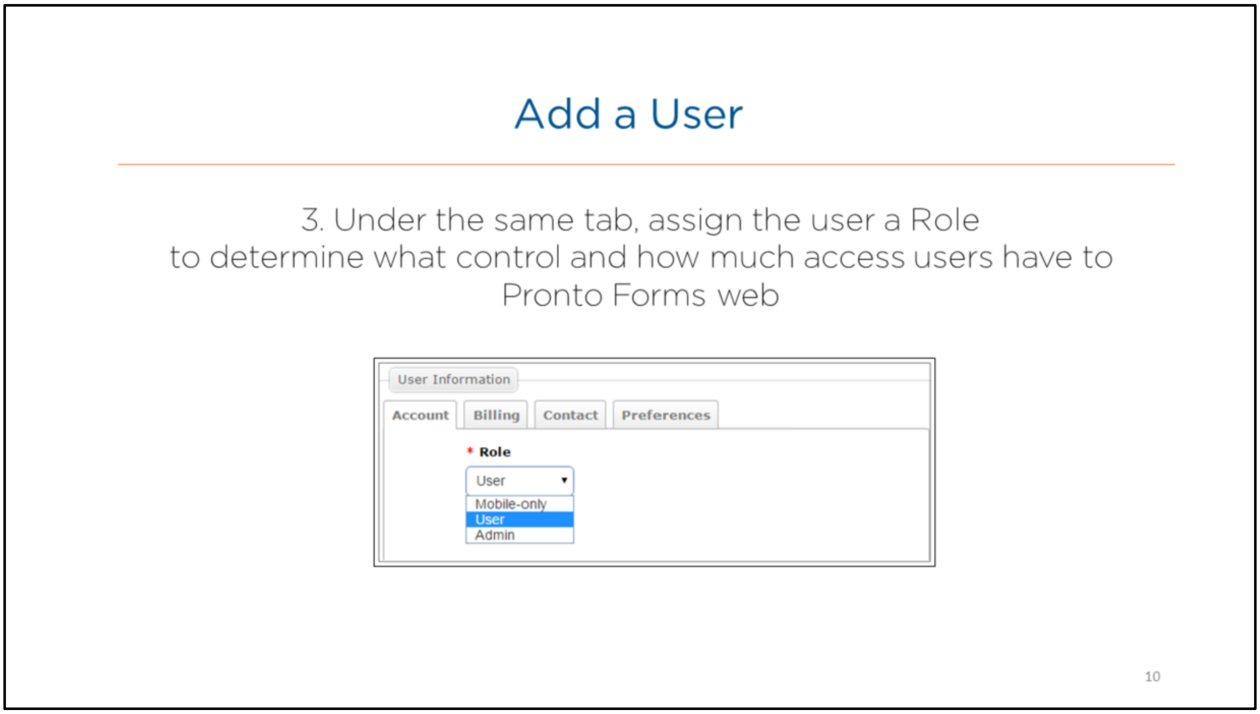
2. On the Account sub tab, fill in the new user's Username, Email Address and First & Last Name



9

Overview:

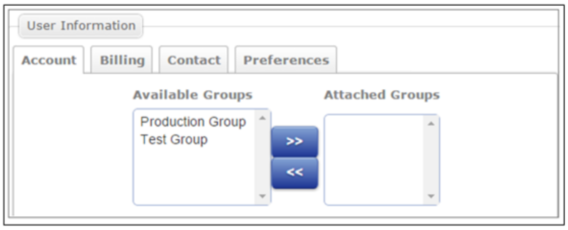
- Read the slide.



Overview:
- Read the slide.

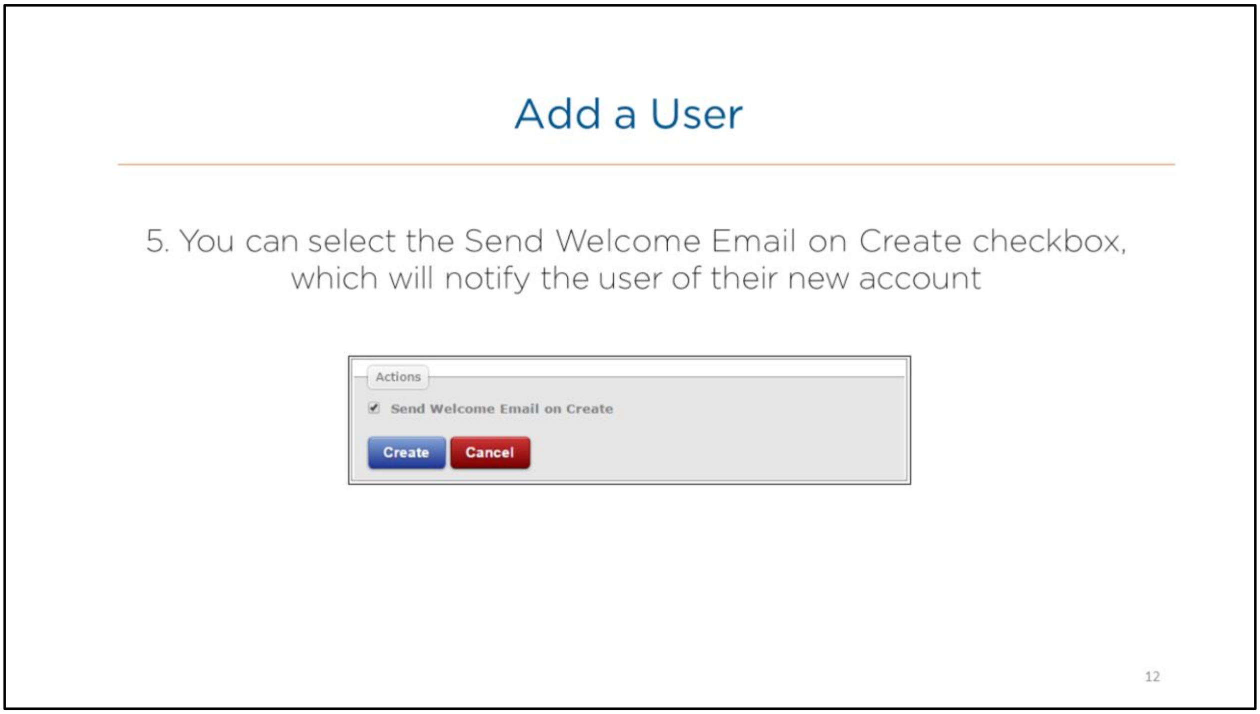
Add a User

4. Assign the user a Group to determine what forms the user has access to in the mobile application



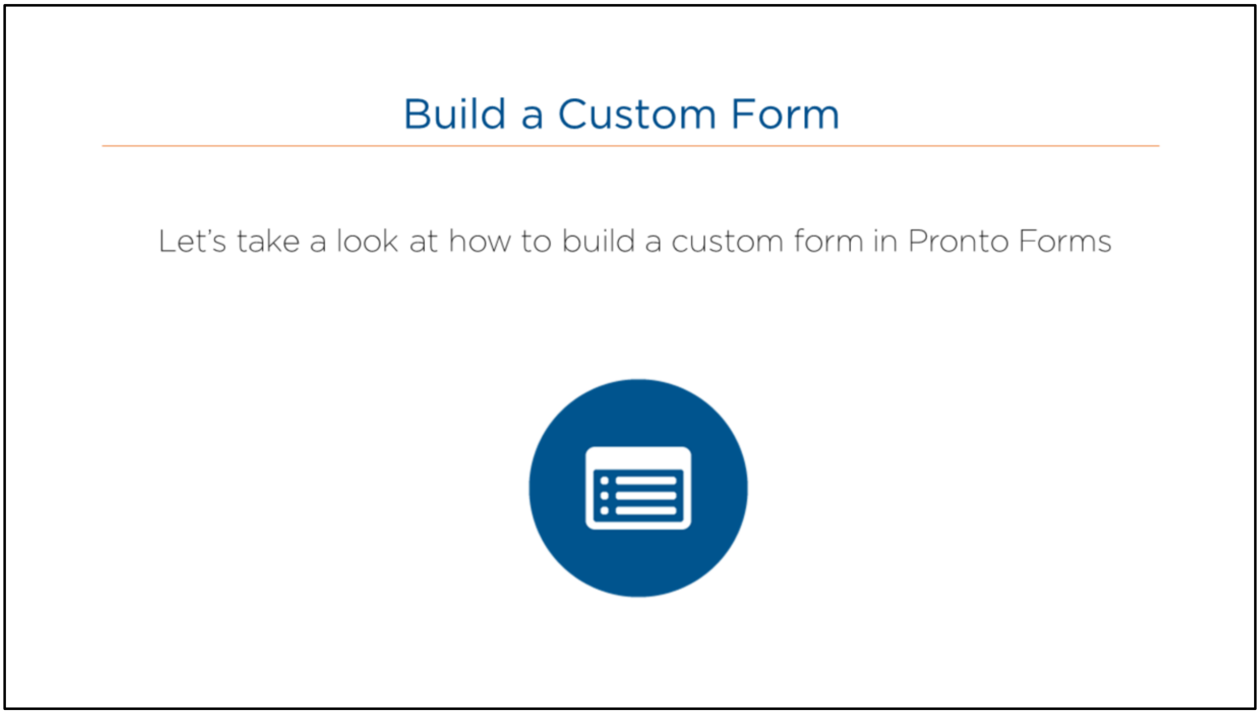
11

Overview:
- Read the slide.



Overview:

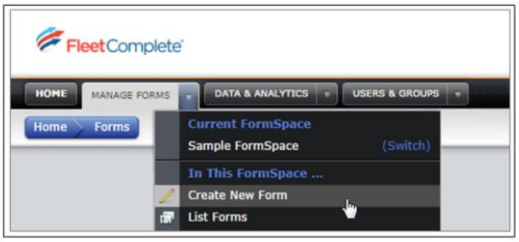
- Read the slide.
- The welcome email will contain the username and password.
- Once you have completed the fields, scroll to the bottom of the screen and click the **Create** button to save the user.



Overview:
- Read the slide.

Create and Name Your Form

1. On the Manage Forms tab, select Create New Form from the menu

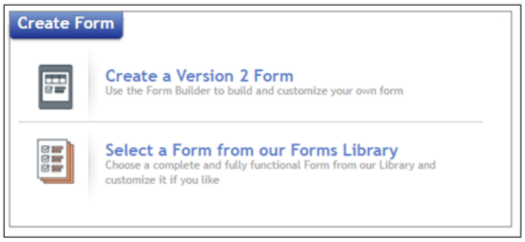


14

Overview:
- Read the slide.

Create and Name Your Form

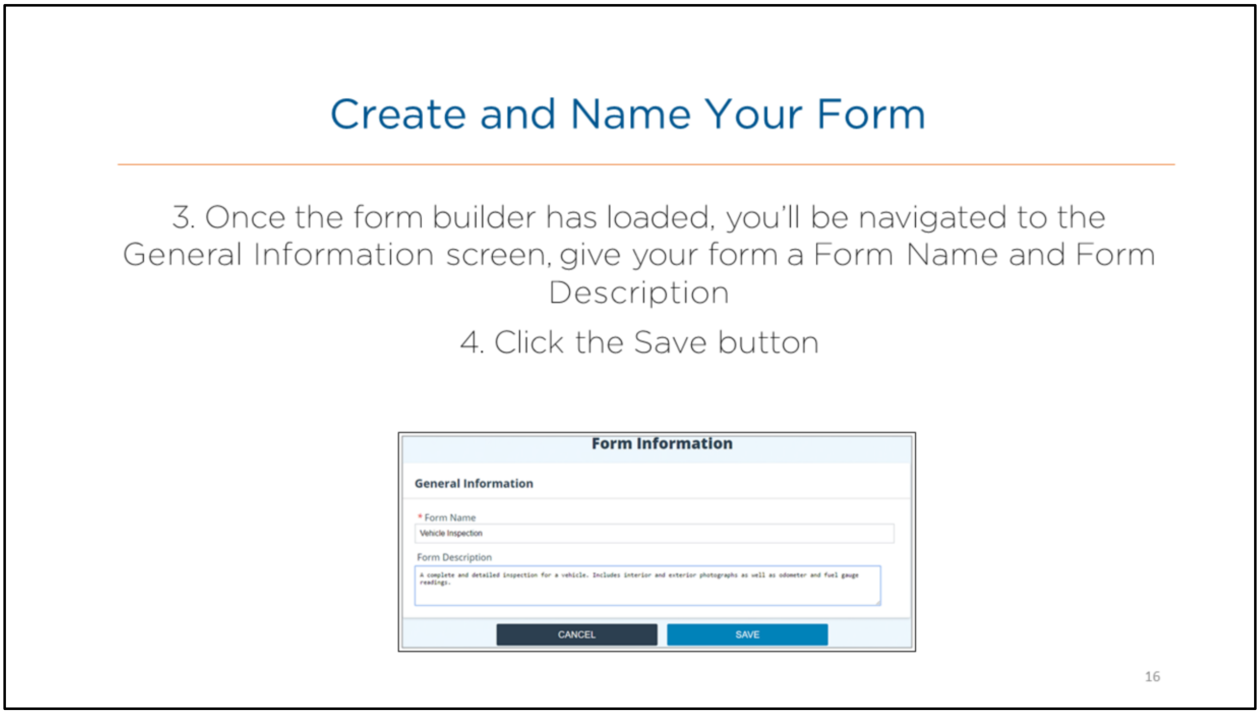
2. Click Create a Version 2 Form on the pop-up window



15

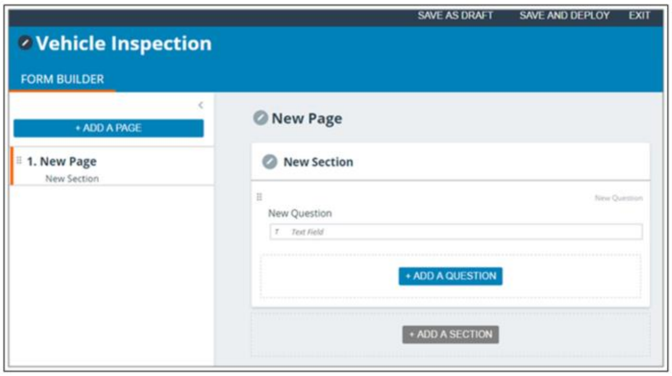
Overview:

- Form Options include:
  - **Create a Version 2 Form**: Use this Form Builder to build and customize your own form
  - **Select a Form from our Forms Library**: Choose a complete and fully functional Form from our Library and customize it
- Read the slide.



Overview:
- Read the slide.
- You will be able to edit this later if desired.

Main Form Display

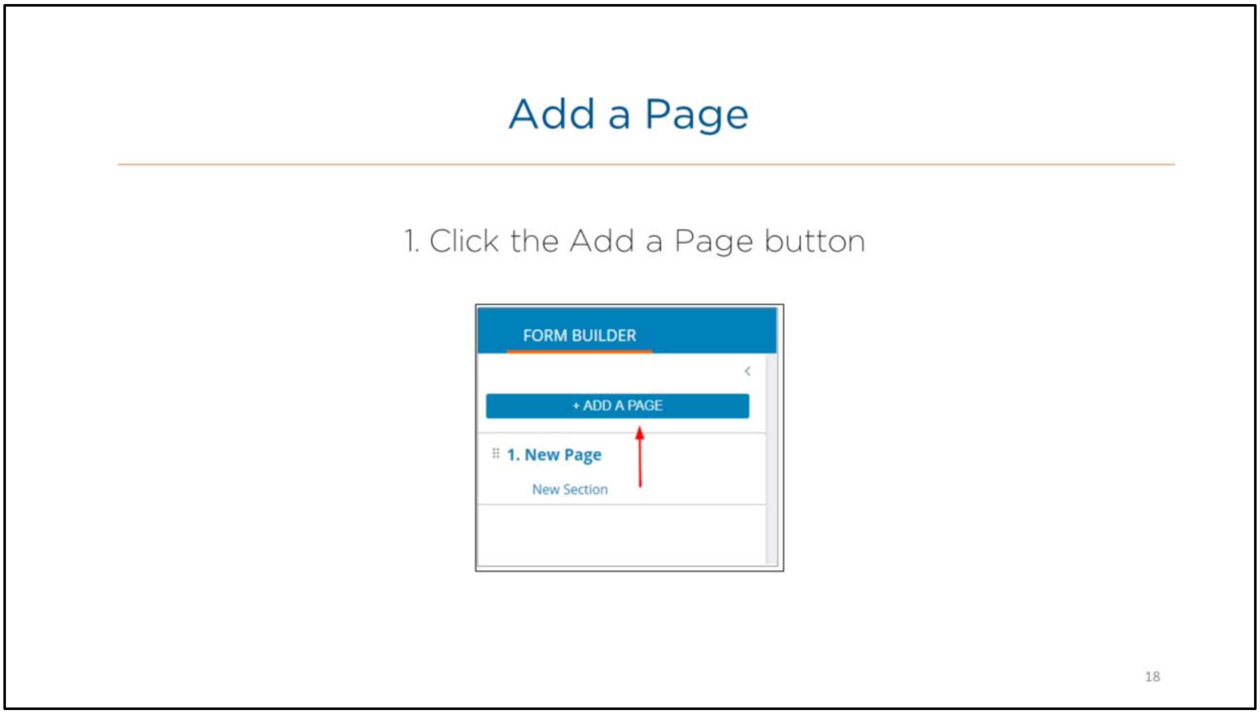


17

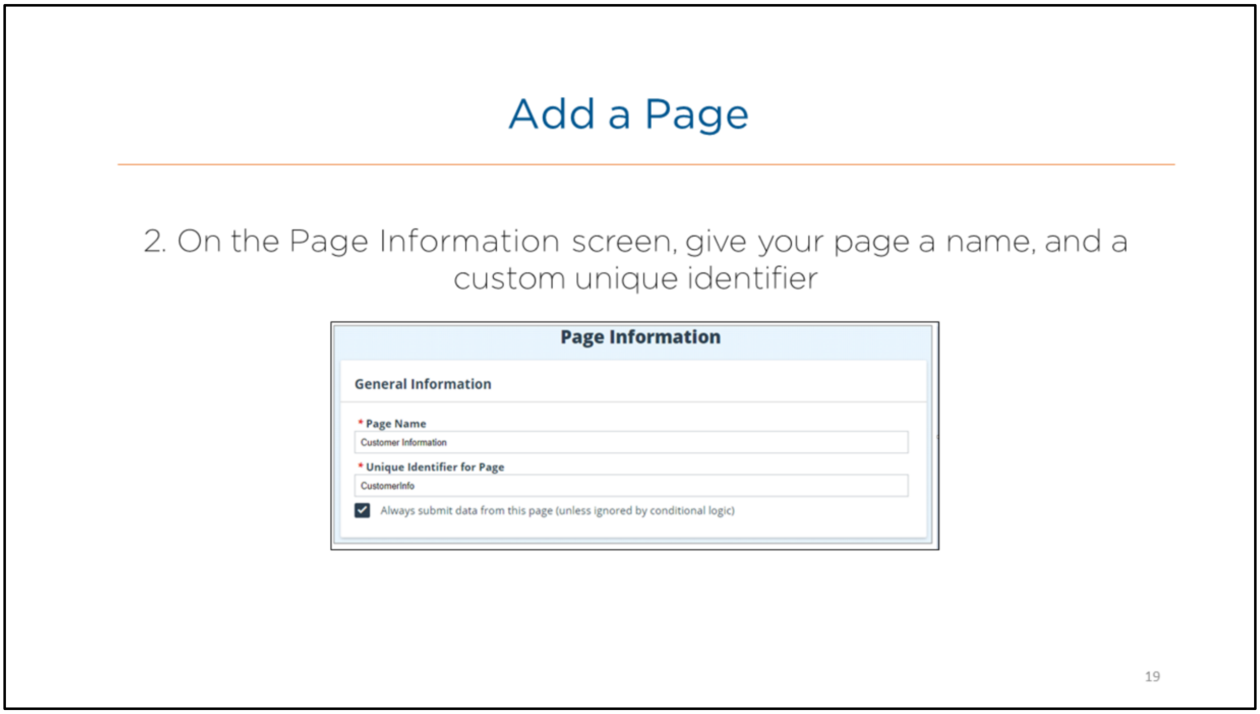
Overview:

- After you name and describe your form, you will be navigated to the Form Builder View.
- Here, you can add pages on the page index to the left, and add sections and questions on the right.
- A **Page** is equivalent to a screen on a mobile device. If the page is long, mobile users will scroll down to see more. They can also swipe sideways to navigate between multiple pages.
- A **Section** creates sub headers within a page, and they organize questions into logical groups. Each page must have at least one section.
- **Questions** require users to specify different kinds of information. Each section must have at least one question.
- For example, you can provide questions you would like the resource to ask the customer while on the job site.

- Let’s take a closer look at how to add Pages, Sections and Questions.



Overview:
- Read the slide.
- Pages are shown on the left side of the Form Builder.



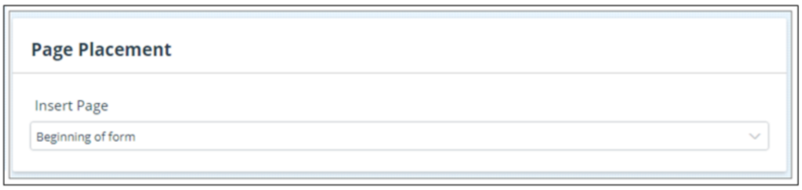
Overview:

- Read the slide.

Add a Page

3. Optionally, select where the page should be placed in your form

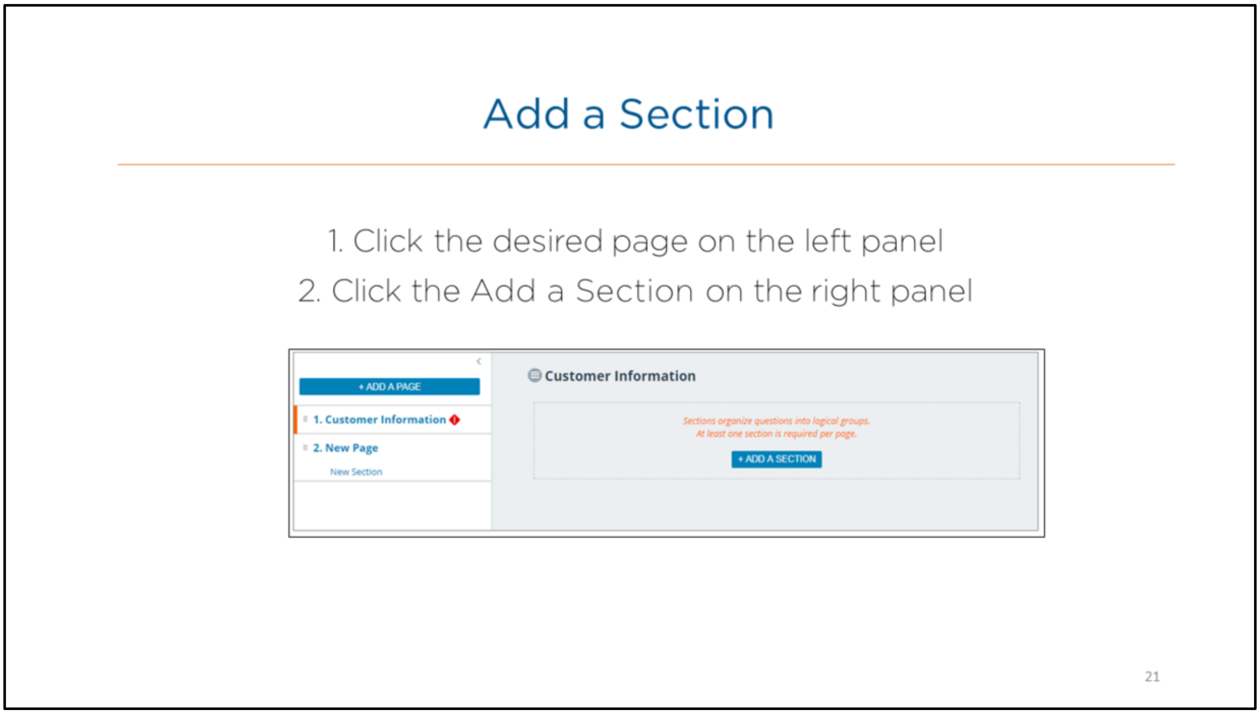
4. click the Save button



20

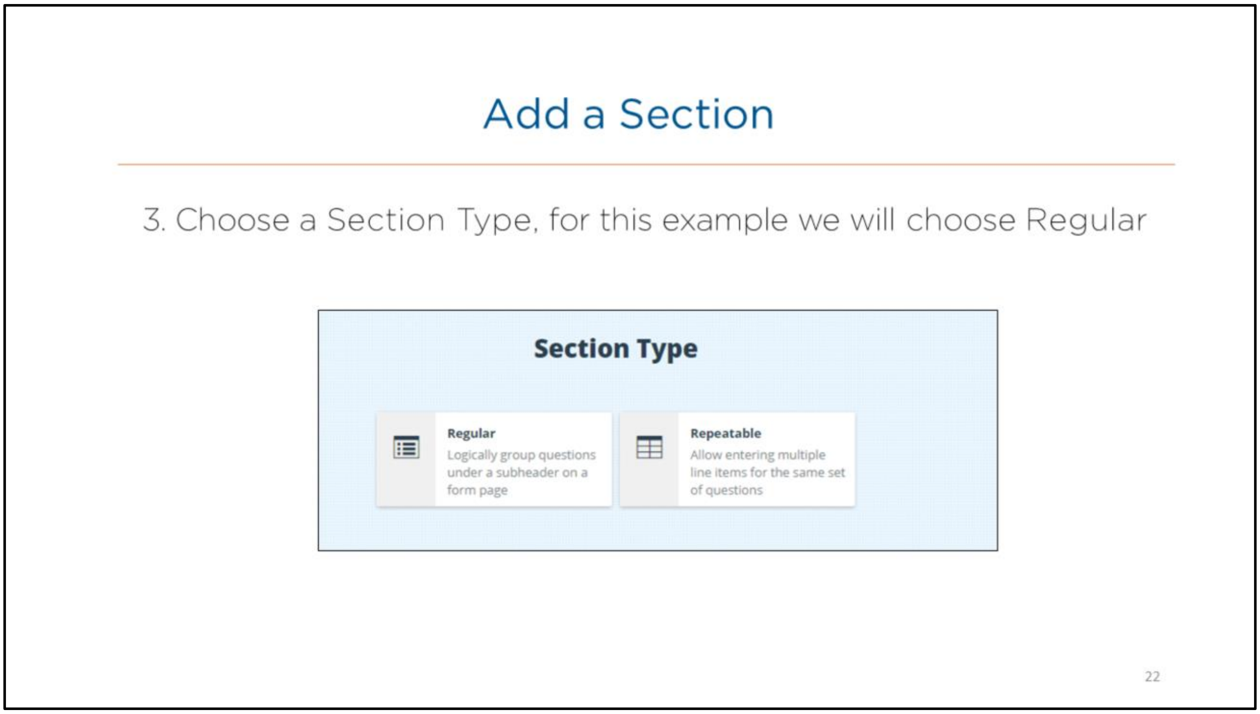
Overview:

- Read the slide.
- By default, new pages are inserted at the end of the current page listing.



Overview:

- Sections are logical divisions on a single page, making it easier for your mobile users to navigate through forms.
- They contain questions within them.
- Read the slide.

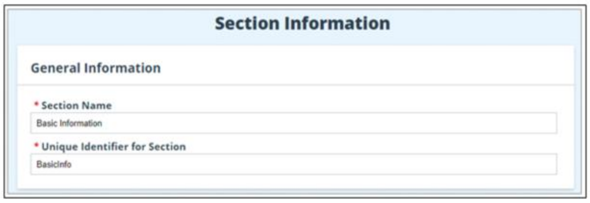


Overview:

- Section Type options include:
  - **Regular**: Logically group questions under a sub header on a form page
  - **Repeatable**: Allow entering multiple line items for the same set of questions
- Read the slide.

Add a Section

4. On the Section Information page under General Information, give your section a name, and a custom Unique Identifier



23

Overview:
- Read the slide.

Add a Section

5. Click the Save button to create the section and return to the Main Form Display page

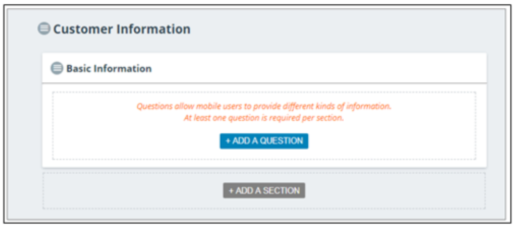
24

Overview:

- Read the slide.

Add a Question

1. Click Add a Question on the right pane, inside of the desired section

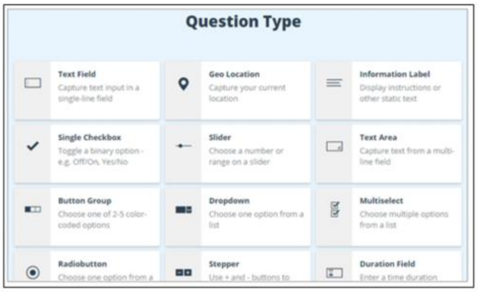


25

Overview:

- Adding a question inside of a Section.
- Read the slide.

Add a Question



2. Select your **Question Type**

3. On the **Question Settings** page, fill out the Question Text and if desired a custom Unique Identifier

4. Configure other settings as desired. The options will differ based on the type of question you choose

5. Select **Save** to create the question and return to the Main Form Display page

26

Overview:
- Read the slide.

Saving your Form

6. Select one of the following:

a. **Save as Draft**: Saves the form as a draft version and does not deploy it to users with standard Can Submit permissions

or

b. **Save and Deploy**: Saves the form as an Active version and deploys it to mobile devices

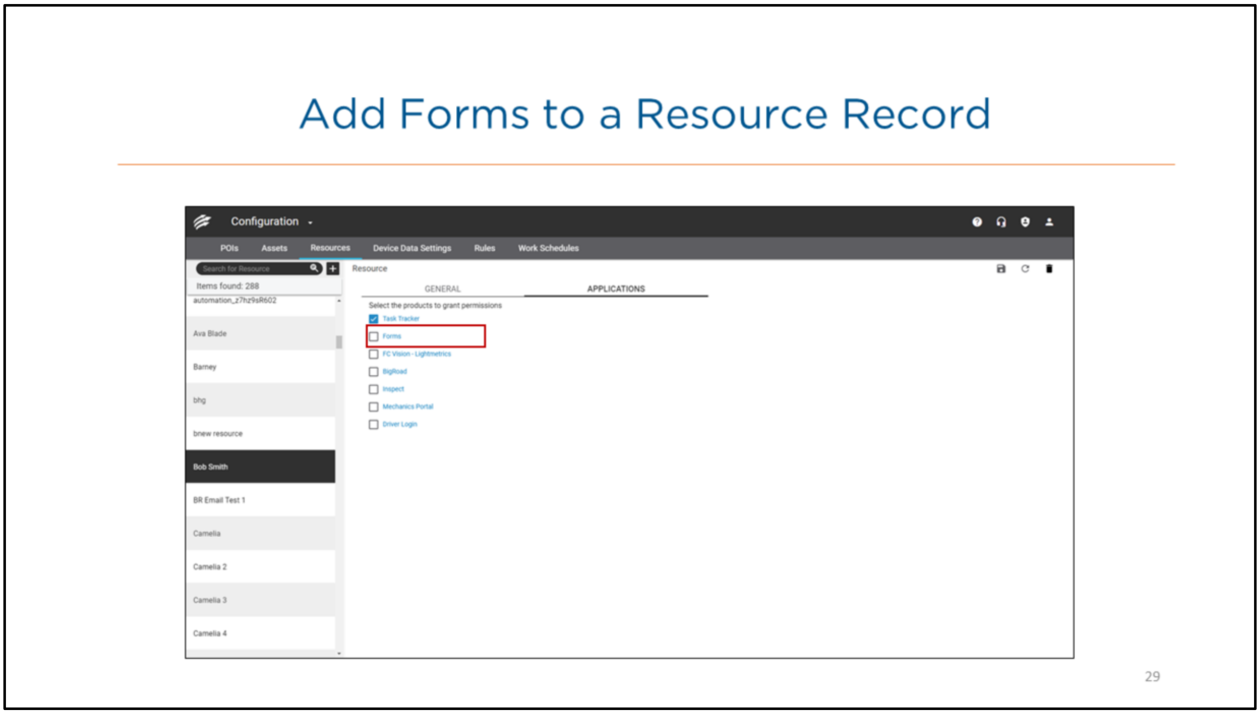
27

Overview:

- Once you have finished building your form, there are two options on saving it.
- These options can be found at the top right of the builder:
    - **Save as Draft:** Saves the current form as a draft, Drafts are not deployed to users with standard “Can Submit” permissions
    - **Save and Deploy:** Saves the form as an Active version and deploys it to mobile devices. Save and deploy is typically used only when a form has been completed and is ready to be deployed to end users This option will not be available if there is an error in your form

Overview:

- Read the slide.

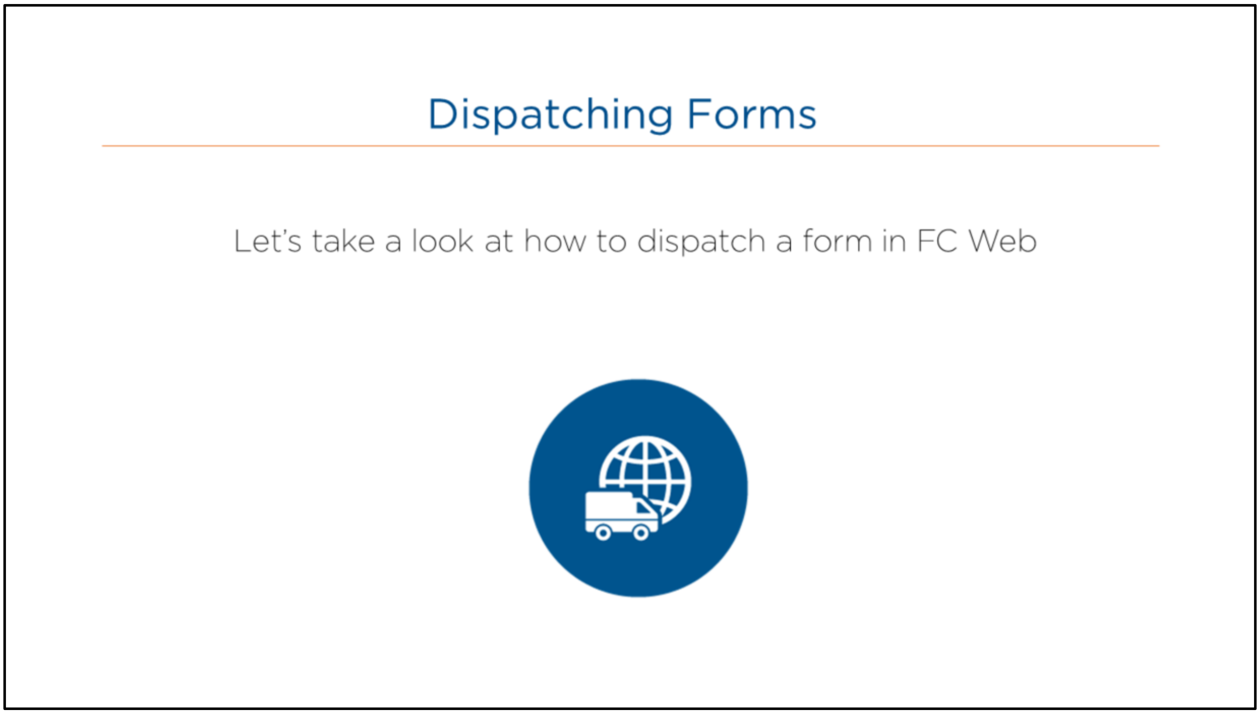


Overview:

- Resources are your drivers or your employees. These are the people we assign to an Asset.
- In order for the resource to use the Pronto Forms mobile application, the administrator must assign Forms to the resource

Steps: Add forms to a resource record

1. On the upper left side of the tracking screen, click the **Main Menu** dropdown arrow
2. Select **Configuration**
3. Select the **Resource** sub tab, and then select **Resources**
4. **Search** for the Resource you would like to add forms to, or Add a new Resource record
5. Click the **Applications** tab
6. From the list of applications, select **Forms**
7. Click the **Save** button



Overview:

- Read the slide.

Overview

Dispatching allows an Administrator to choose which resource will need to fill out a form, and to provide important information on the task.

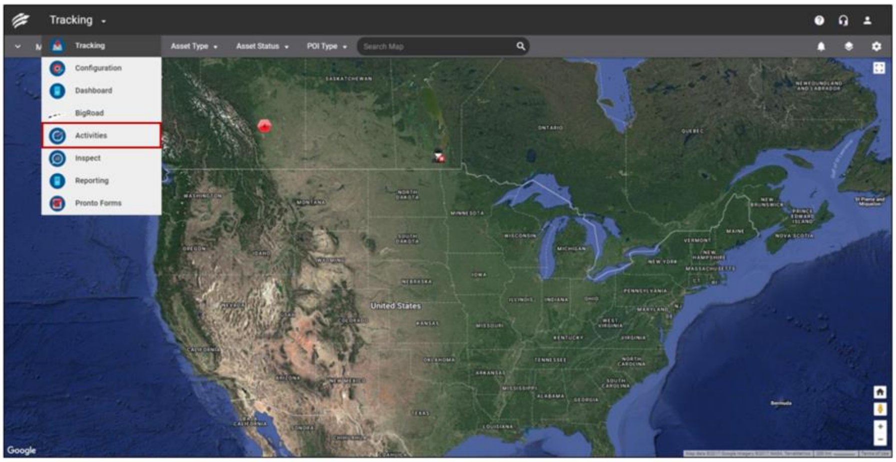
For example, you can direct a technician to a customer location, with instructions on the work to be done on-site.

This can help resources arrive prepared for their next site visit, allowing them to get right to the central task at hand.

Overview:

- Read the slide.

Dispatch from FC Web



32

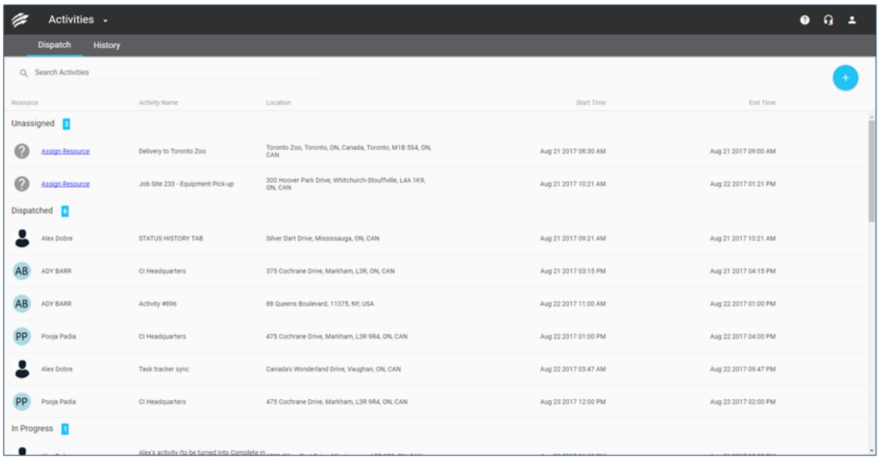
Overview:

- Once you have logged in to FC Web, you are automatically navigated to the Tracking screen.
- On this screen you can access the Activities functionality from the Main menu.

Steps: dispatch from FC Web

1. On the upper left side of the tracking screen, click the **Main Menu** dropdown arrow
2. Select **Activities**

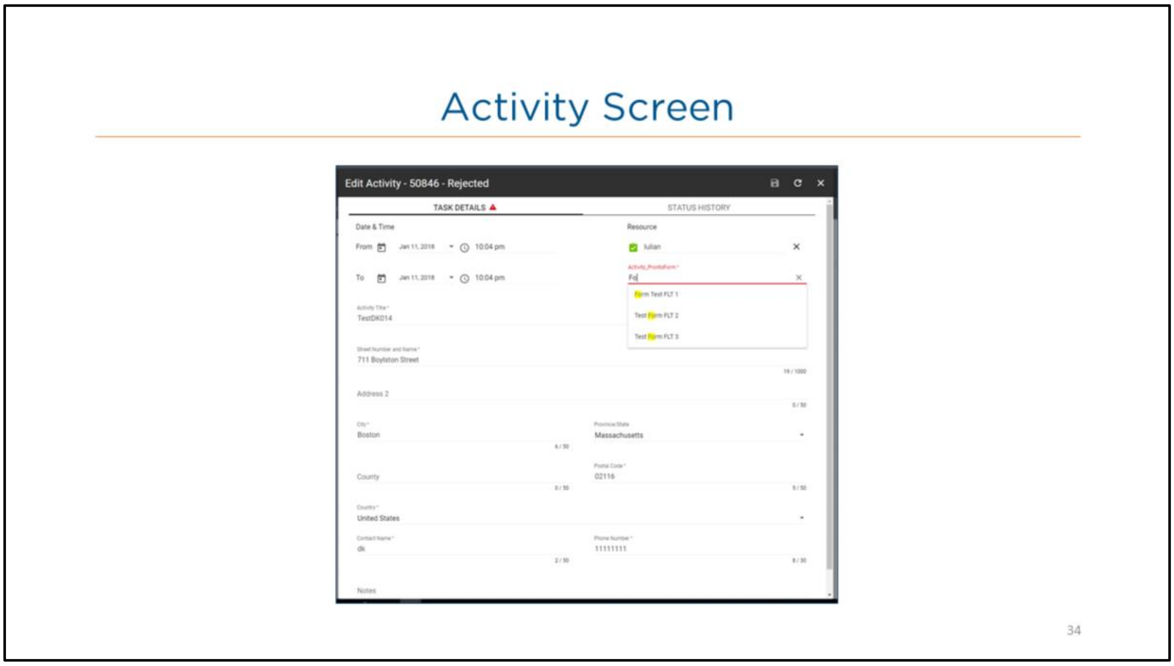
Adding Activities



33

Overview:
- Dispatch Activities are tasks that need to be performed at a specific location, assigned to a Resource, and then monitored in terms of their progress.
- Activities can be created from the Activities screen of FC Web.

Steps: Create a Dispatch Activity via Activities Screen
1. From the Main Menu, select **Activities**
2. Click the blue **Plus** (+) button to the right of the screen

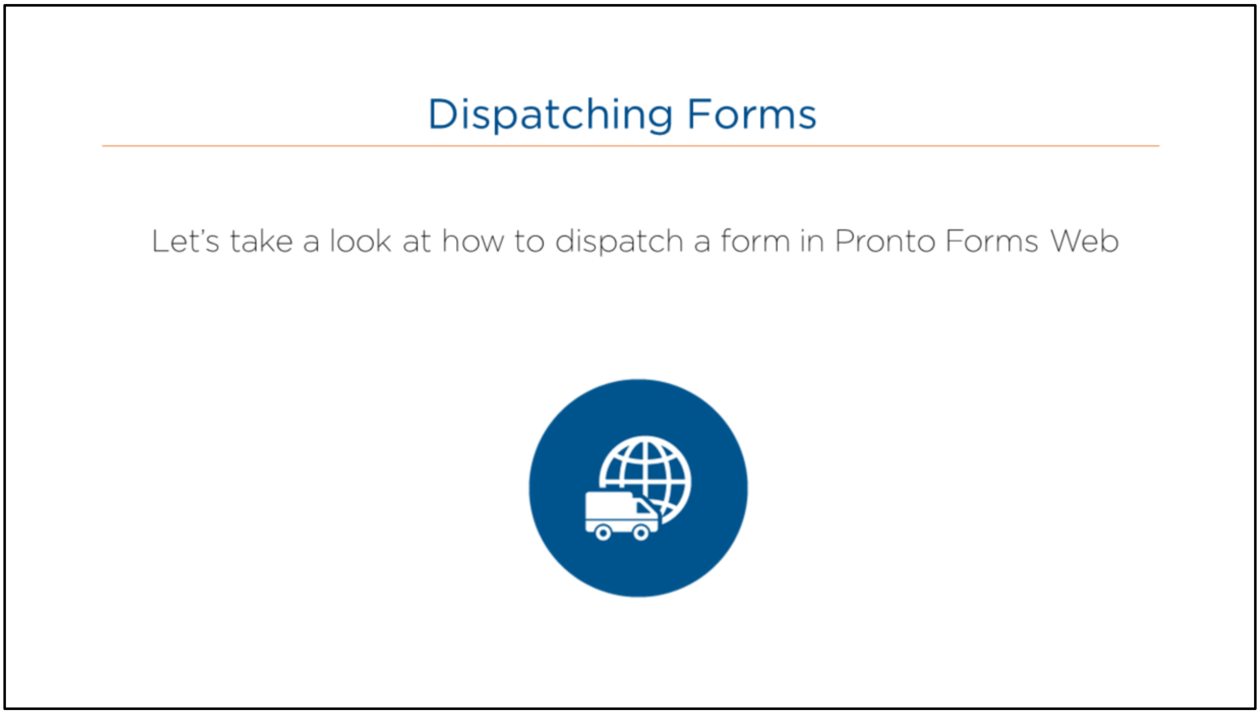


Overview:

- The Activity screen allows you to send location information to the resource.
- Locations must be entered manually into the address fields.
- Pronto Forms must be created in advance in order to search and attached them to the activity.
- When the activity and form are completed it will show up in history with a link to the form
- Clicking this link will take users to the pronto screen where they will need to log in to view the form

Steps: Creating a Dispatch Activity via the Activities Screen

1. Set the **From** and **To** dates and times for the activity
2. Search for a **Resource** by typing at least 1 character into the Resource field
3. Type the **Activity Name**
4. Search for the **Pronto Form** by typing at least 1 character in the Activity Pronto Form field
5. Type the activities location into the **Address** fields
6. Type a **Contact Name** and **Phone Number** as required
7. Type any **Notes** pertaining to the activity for the Resource
8. Click the **Save** button



Overview:
- Read the slide.

Dispatch from Pronto Web

1. After navigating to the desired form, click the Dispatch button beside the form name

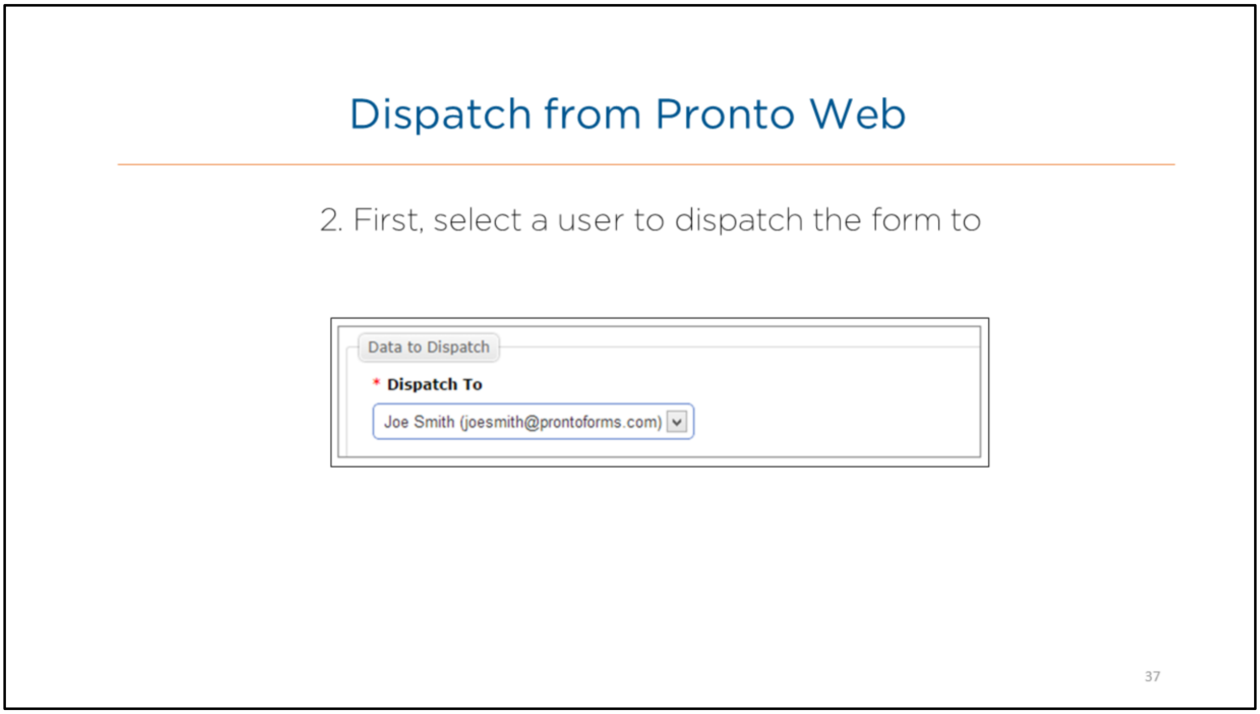
36

Overview:

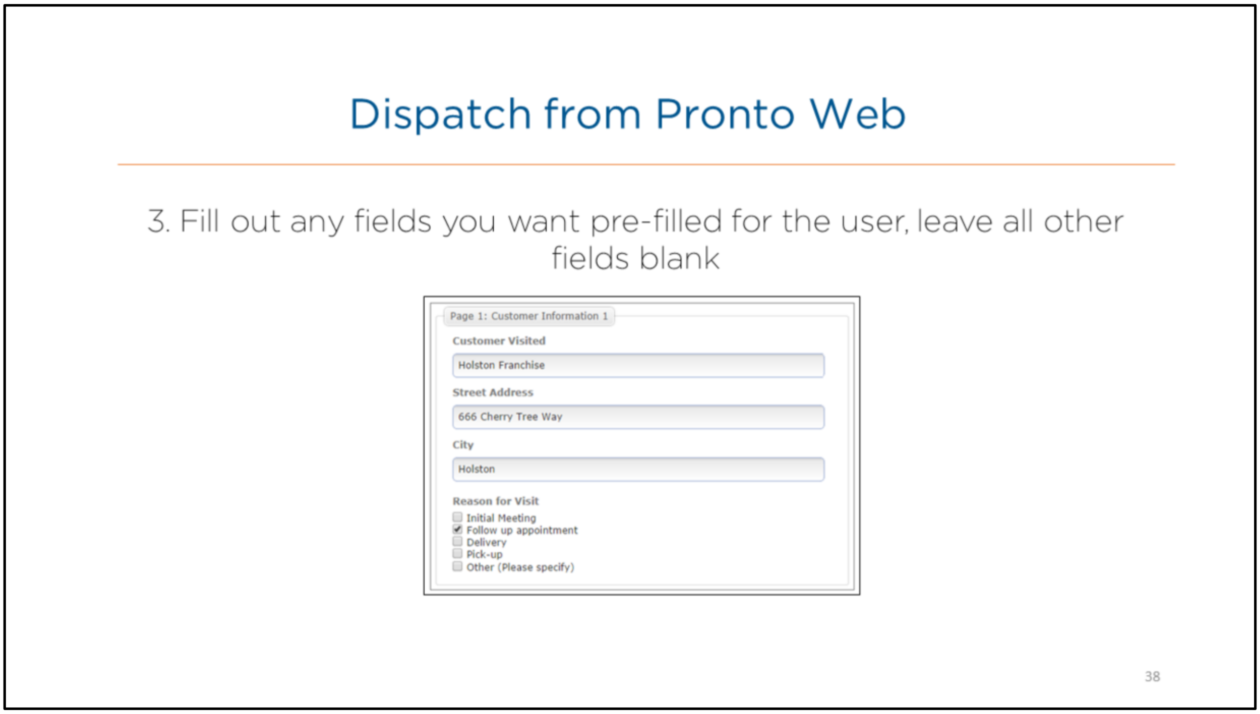
- Read the slide.

- Note: if this button is not available, turn on dispatching for this form first.

1. Click the **Edit Form** button.
2. Select the **Settings** tab.
3. Select **Allow** form to be dispatched to mobile users.
4. Choose either: **Form can be dispatched to app inbox only** or **Form can be dispatched OR started by user from the Forms tab.**



Overview:
- Read the slide.



Overview:

- Read the slide.

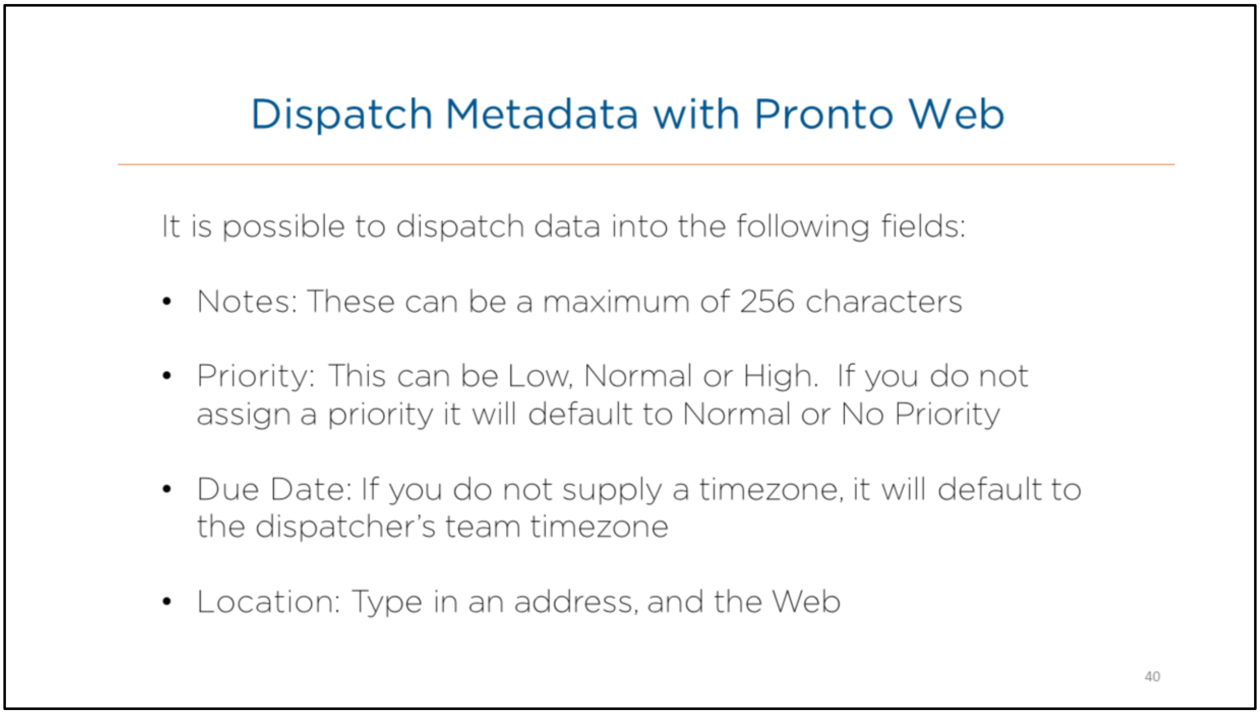
Dispatch from Pronto Web

4. Click the Dispatch button at the bottom of the screen

39

Overview:

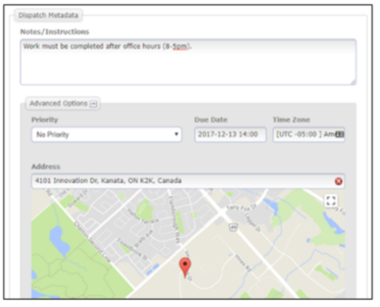
- Read the slide.



Overview:
- Easily assign notes, priorities, due dates, and locations to dispatches, giving mobile users the tools they need to efficiently plan their work in the field.
- Your mobile users can get a high-level look at their assigned jobs without needing to look at each individual form: they can sort based on the information right from the inbox.
- Read the slide.

How to Dispatch into Metadata Fields

1. Additional boxes at the top of the dispatch screen, allow you to fill in the metadata information. Just add the information you need. You do not have to fill out every piece of metadata information.



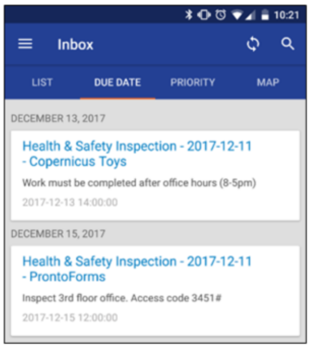
41

Overview:

- Read the slide.

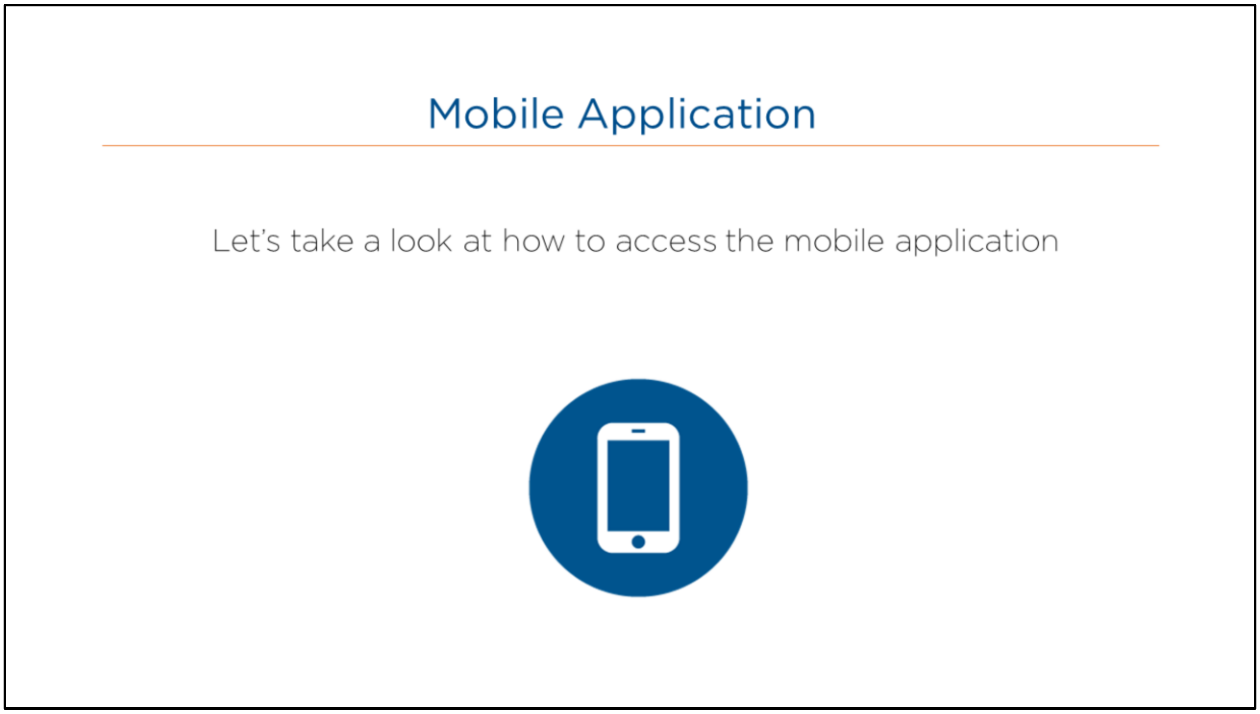
How to Dispatch into Metadata Fields

2. The notes will display beneath the dispatched form's name on your mobile user's inbox. The others can act as filters by tapping the different tabs at the top of the inbox.



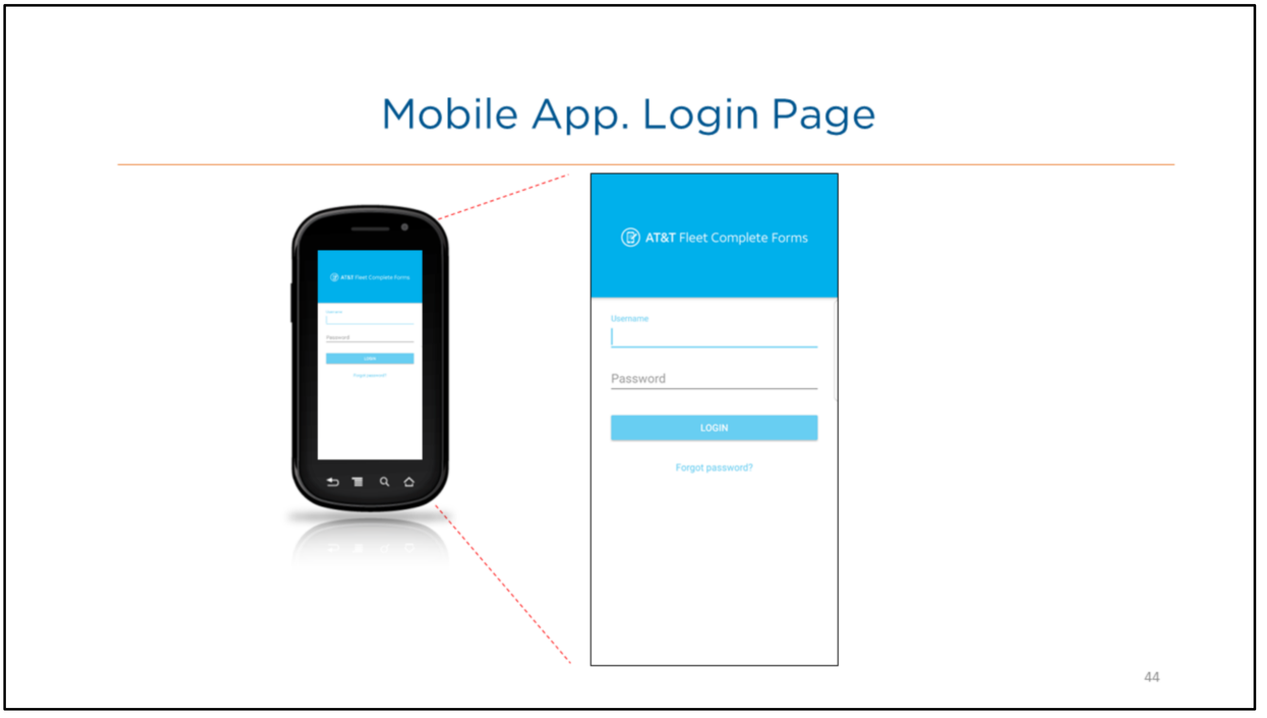
42

Overview:
- Read the slide.



Overview:

- Read the slide.



Overview:

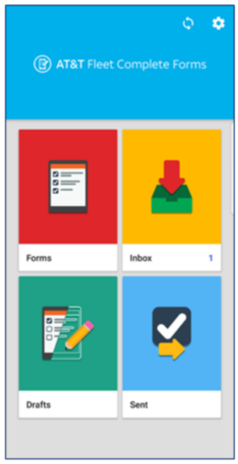
- The Pronto Forms mobile application can be downloaded from the Google Play or iTunes store from the mobile device.
- Resources need to log in to the Pronto Forms application with their username and password that was sent in the welcome email to their email address by their **Administrator**.

Steps: Logging in to Pronto Forms on the mobile app

1. On the *Login* page in the *Username* field, type your *Username*
2. In the *Password* field, type your password information
3. Tap **Log In**

Note: on subsequent login attempts**,** if you can't remember your password, tap the **Forgot Password?** link to recover your Password. A new temporary password is sent to your email.

Home Page

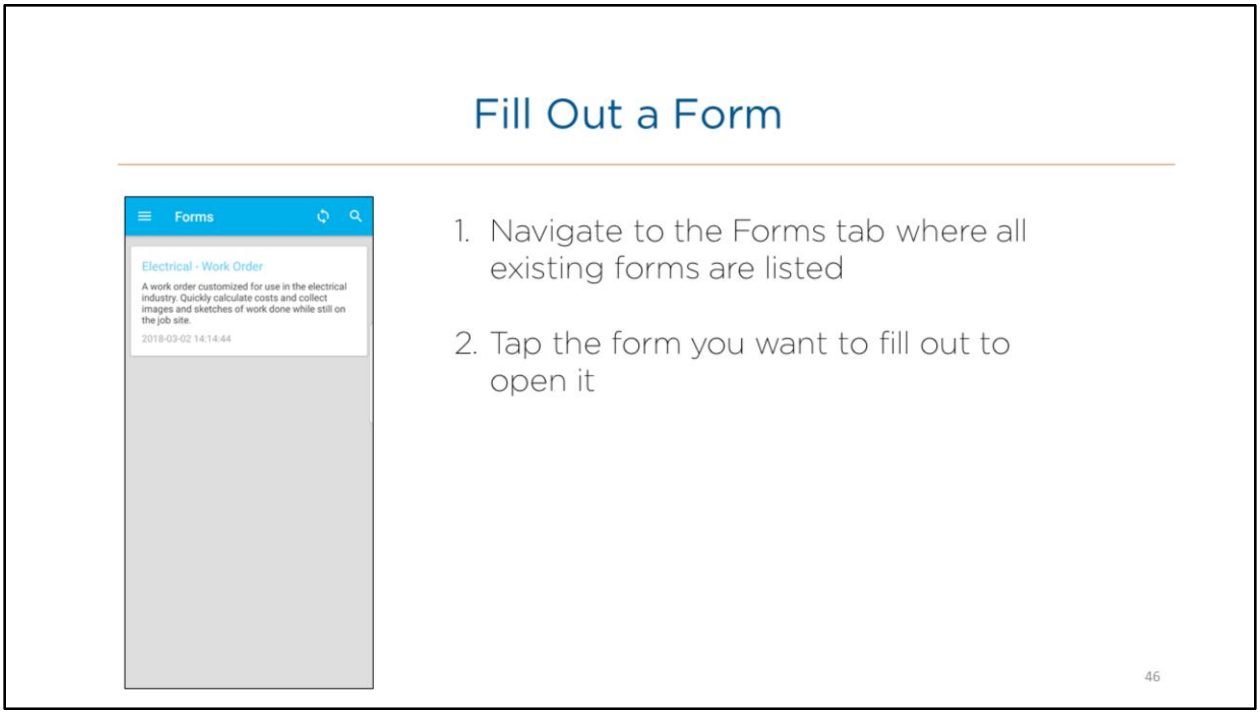


45

Overview:

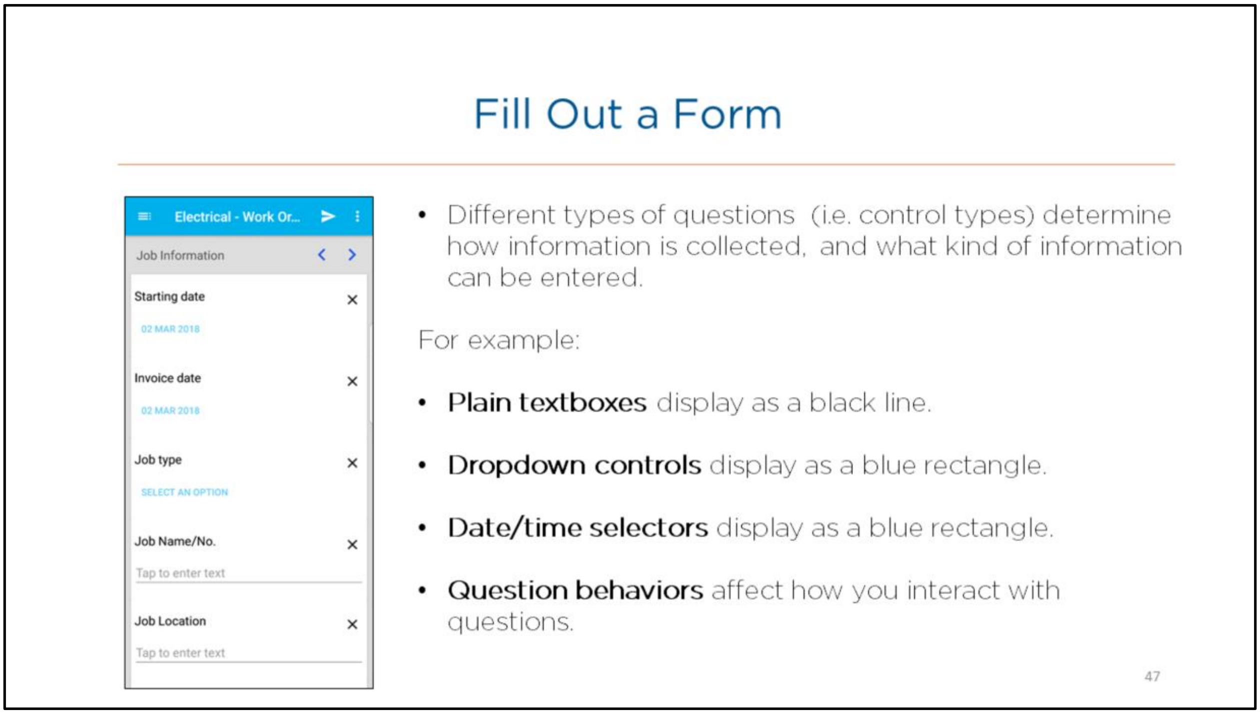
- The Home Page includes:
  - Forms
  - Inbox
  - Drafts
  - Sent, and
  - Settings

- Let’s take a closer look at how to fill out a Form.



Overview:

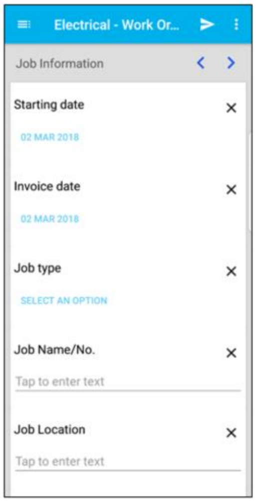
- Read the slide.
- Alternatively, if your team is utilizing dispatching, tap the Inbox tab to start a form.



Overview:

- Different types of questions (i.e. control types) determine how information is collected, and what kind of information can be entered.
- For example:
- **Plain textboxes** are displayed as a black line. Tap and type in an answer using the keyboard that appears.
- **Dropdown controls** are displayed as a blue rectangle. Tap and select an option from the list.
- **Date/time selectors** are displayed as a blue rectangle. Tap and choose a date/time using the scroll.
- Additionally, different **question behaviors** affect how you interact with questions.
- Required questions must be answered before you can go to the next page. They are distinguishable by the asterisks (*) beside them.
- Read-only questions are pre-filled and you cannot edit the answer. They are distinguishable by their light grey text.

Fill Out a Form



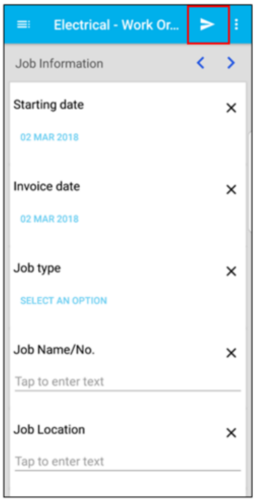
- To navigate between pages, touch and swipe
- Swipe left to go to the next page
- Swipe right to go to the previous page
- Or use the left and right arrows at the top of the page

48

Overview:

- Read the Slide.

Submit a Form

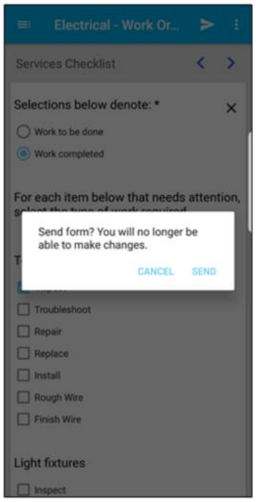


- Tap the Send button at the top right of the page to submit the form
- Once a form is submitted, no changes can be made to it

49

Overview:
- Read the Slide.

Submit a Form

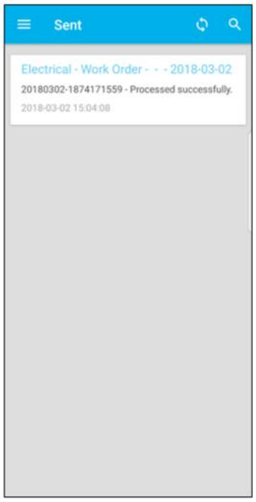


- The app will reconcile after you submit the form, and you will be notified when the form is available in Pronto Forms web

50

Overview:
- Read the Slide.

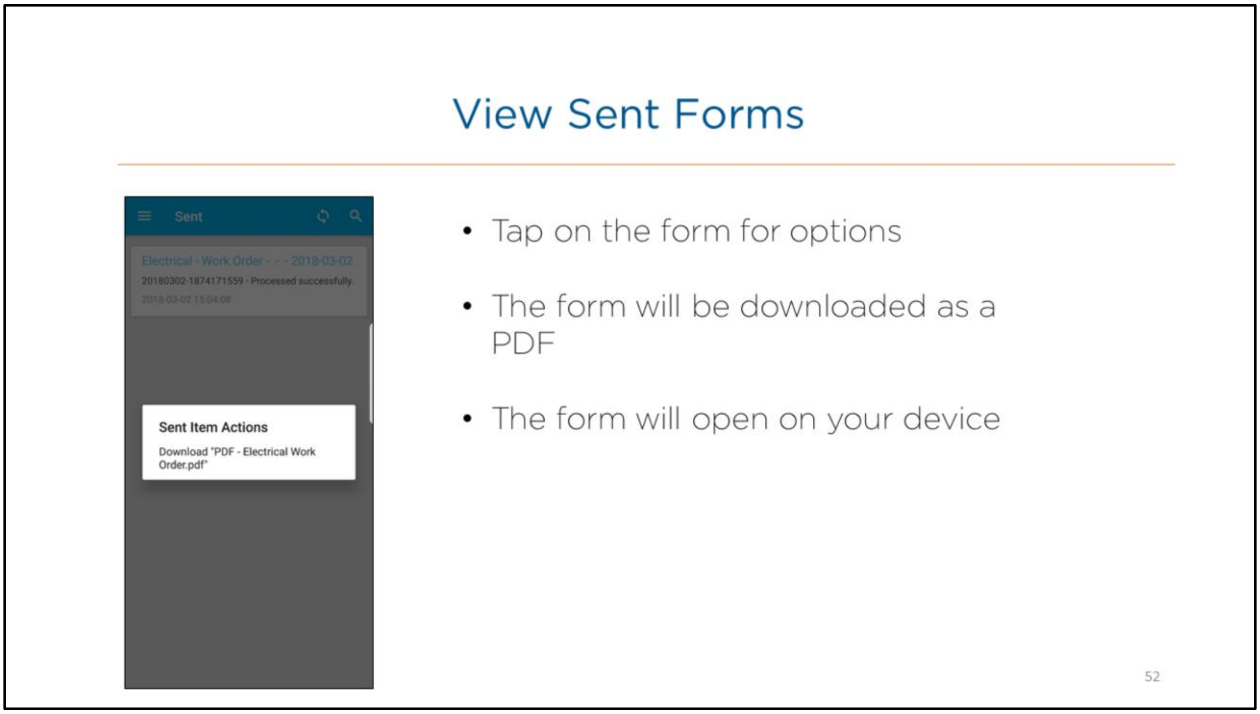
View Sent Forms



- Navigate to the Sent tab to view submitted forms, here you can see the status of a submission, as well as the date and time submitted

51

Overview:
- Read the slide.



Overview:
- Read the Slide.

View Sent Forms

- The appearance of this document can be customized in Pronto Forms web
- If enabled, submitters will also receive an email with a PDF of their submitted data
- This email will be sent to the email address provided when signing up for Pronto Forms, and the PDF is exactly the same as what is in the Sent box

Overview:

- Read the Slide.

Review of topics covered

- Added User accounts in the Web application
- Built a custom Form
- Added Forms to a Resource record
- Dispatched a Form to a Resource via FC Web or Pronto Forms Web
- Viewed the Form in the mobile application

Overview:
- Today we addressed the following list of topics.
- Read the slide.

Thank You!