



Welcome to the Fleet Complete Video Series

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

Software Version: R2.2.4
Publication Date:
Author: Training Department

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

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.

Log In to FC Web

Sign in to Fleet Complete

Enter Work Email *
Please enter your email address

Enter Password *
Please enter your password

Having trouble signing in? **SIGN IN**

English ▾ Help and Support

4

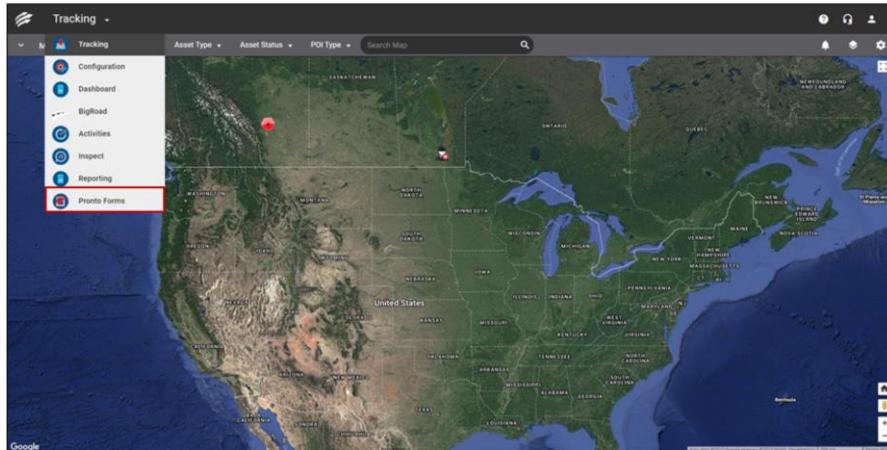
Overview:

- 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



5

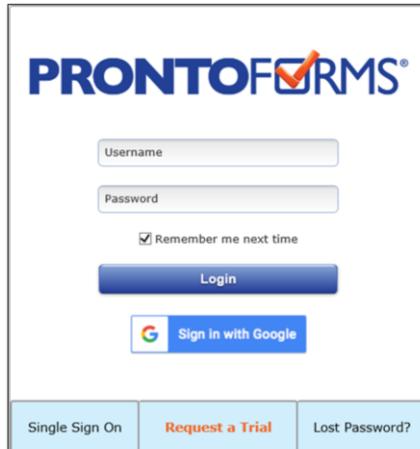
Overview:

- 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**

Accessing Pronto Forms



PRONTOFORMS®

Username

Password

Remember me next time

Login

Sign In with Google

Single Sign On Request a Trial Lost Password?

6

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

Add a User

Let's take a look at how to add a user in Pronto Forms



Overview:

- Read the slide.

Add a User

1. Under the Users & Groups tab, click Create User



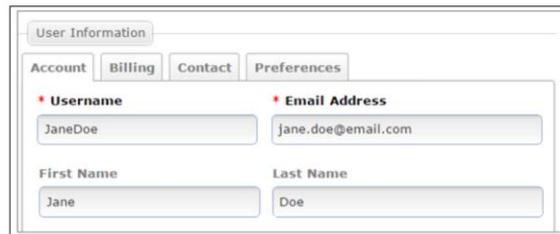
8

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



The screenshot shows a web form titled "User Information". It has four tabs: "Account", "Billing", "Contact", and "Preferences". The "Account" tab is selected. The form contains four input fields:

- Username**: JaneDoe
- Email Address**: jane.doe@email.com
- First Name**: Jane
- Last Name**: Doe

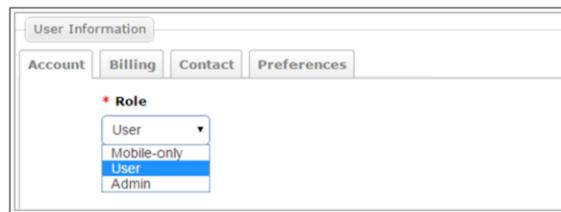
9

Overview:

- Read the slide.

Add a User

3. Under the same tab, assign the user a Role to determine what control and how much access users have to Pronto Forms web



The screenshot shows a web form titled "User Information" with four tabs: "Account", "Billing", "Contact", and "Preferences". The "Account" tab is active. Below the tabs, there is a section labeled "* Role" with a dropdown menu. The dropdown menu is open, showing four options: "User", "Mobile-only", "User", and "Admin". The second "User" option is highlighted with a blue background.

10

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.

Add a User

5. You can select the Send Welcome Email on Create checkbox, which will notify the user of their new account



The image shows a dialog box titled "Actions". Inside the dialog, there is a checkbox labeled "Send Welcome Email on Create" which is checked. Below the checkbox are two buttons: a blue "Create" button and a red "Cancel" button.

12

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.

Build a Custom Form

Let's take a look at how to build a custom form in Pronto Forms

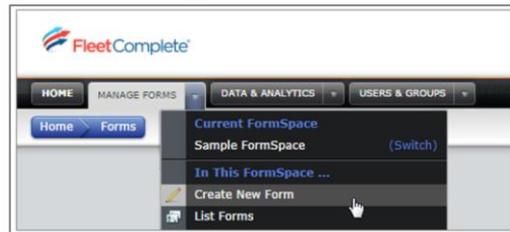


Overview:

- Read the slide.

Create and Name Your Form

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



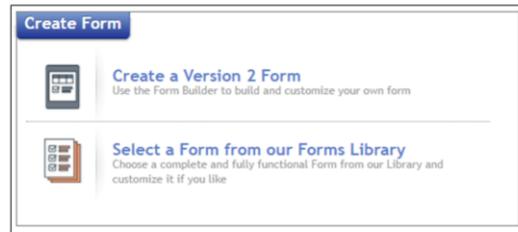
14

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.

Create and Name Your Form

3. Once the form builder has loaded, you'll be navigated to the General Information screen, give your form a Form Name and Form Description

4. Click the Save button



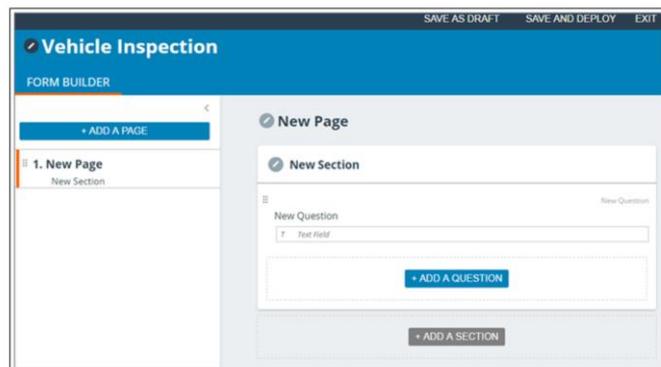
The screenshot shows a web form titled "Form Information". Under the "General Information" section, there is a "Form Name" field with a red asterisk and a "Vehicle Inspection" label. Below that is a "Form Description" field with a red asterisk and a placeholder text: "A complete and detailed inspection for a vehicle. Includes interior and exterior photographs as well as odometer and fuel gauge readings." At the bottom of the form are two buttons: "CANCEL" and "SAVE".

16

Overview:

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

Main Form Display



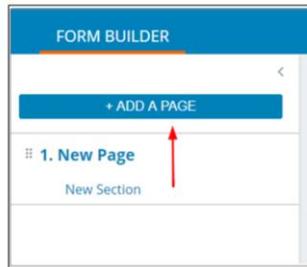
17

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.

Add a Page

1. Click the Add a Page button



18

Overview:

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

Add a Page

2. On the Page Information screen, give your page a name, and a custom unique identifier



The screenshot shows a form titled "Page Information" with a "General Information" section. It contains two required text input fields: "Page Name" (with a placeholder "Customer Information") and "Unique Identifier for Page" (with a placeholder "CustomerInfo"). Below these fields is a checked checkbox labeled "Always submit data from this page (unless ignored by conditional logic)".

19

Overview:

- Read the slide.

Add a Page

3. Optionally, select where the page should be placed in your form
4. click the Save button



The image shows a dialog box titled "Page Placement". Inside the dialog, there is a label "Insert Page" above a dropdown menu. The dropdown menu is currently set to "Beginning of form".

20

Overview:

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

Add a Section

1. Click the desired page on the left panel
2. Click the Add a Section on the right panel



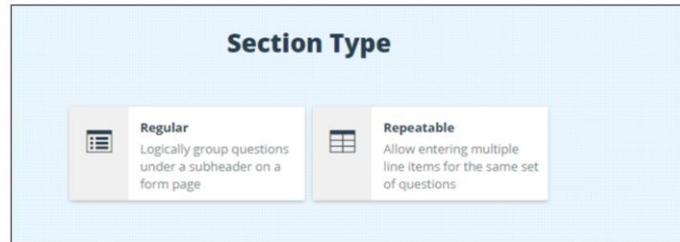
21

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.

Add a Section

3. Choose a Section Type, for this example we will choose Regular



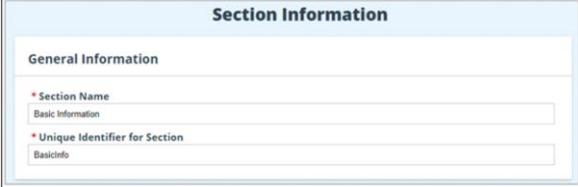
22

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



The screenshot shows a form titled "Section Information" with a sub-section "General Information". It contains two required input fields:

- * Section Name**: A text input field with the label "Basic Information" below it.
- * Unique Identifier for Section**: A text input field with the label "BasicInfo" below it.

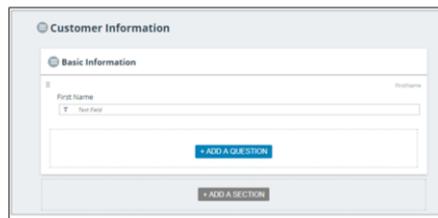
23

Overview:

- Read the slide.

Add a Section

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



The screenshot shows a form editor interface. At the top, there is a header 'Customer Information' with a minus sign icon. Below it, there is a sub-section 'Basic Information' with a plus sign icon. The form contains a 'First Name' label and a text input field. Below the input field, there is a blue button labeled '+ ADD A QUESTION'. At the bottom of the form editor, there is a grey button labeled '+ ADD A SECTION'.

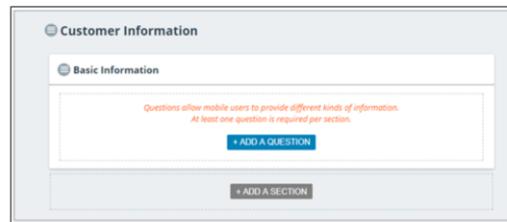
24

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

| Question Type | | |
|--|--|---|
| <input type="checkbox"/> Text Field Capture text input in a single-line field | <input type="location" value=""/> Geo Location Capture your current location | <input type="text" value=""/> Information Label Display instructions or other static text |
| <input checked="" type="checkbox"/> Single Checkbox Toggle a binary option - e.g. OFF/On, Yes/No | <input type="range" value=""/> Slider Choose a number or range on a slider | <input type="text" value=""/> Text Area Capture text from a multi-line field |
| <input type="checkbox"/> Button Group Choose one of 2-5 color-coded options | <input type="list" value=""/> Dropdown Choose one option from a list | <input type="checkbox"/> Multiselect Choose multiple options from a list |
| <input type="radio"/> Radiobutton Choose one option from a | <input type="button" value=""/> Stepper Use + and - buttons to | <input type="text" value=""/> Duration Field Enter a time duration |

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

Resource Record

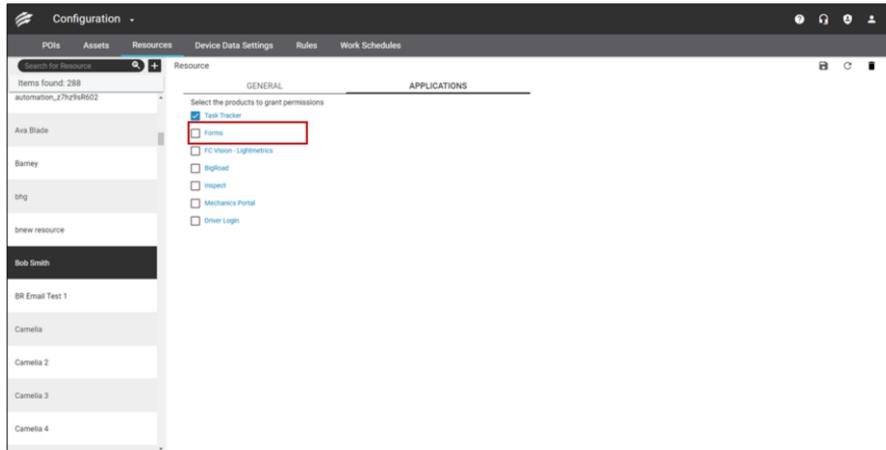
Let's take a look at how to add Forms to a Resource Record in FC Web



Overview:

- Read the slide.

Add Forms to a Resource Record



29

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

Dispatching Forms

Let's take a look at how to dispatch a form in FC Web



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.

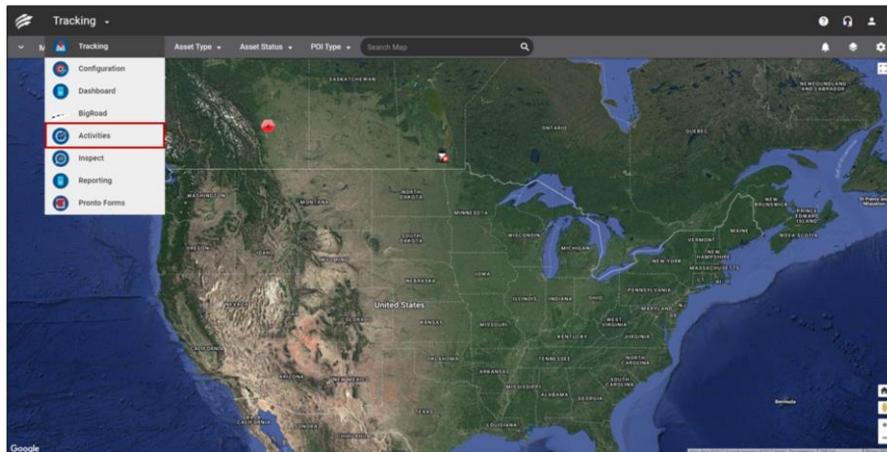
For example, you can direct a technician to a customer location, with instructions on the work to be done on-site.

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

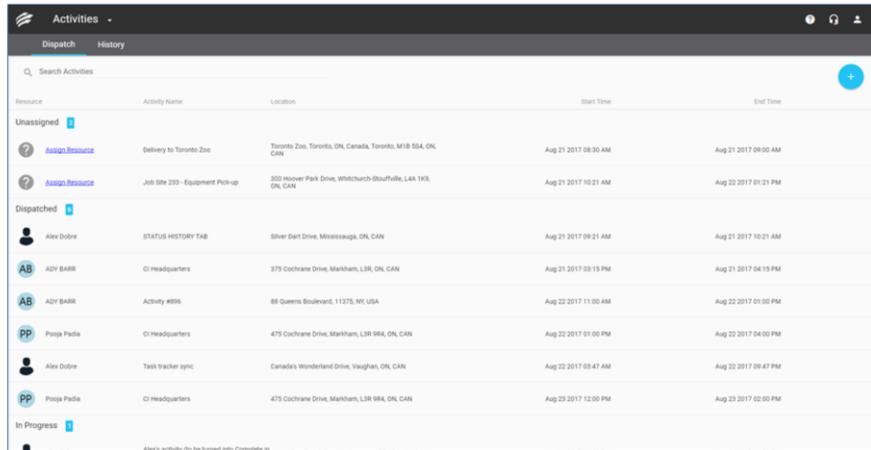
Overview:

- 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



| Resource | Activity Name | Location | Start Time | End Time |
|--------------------|----------------------------------|---|----------------------|----------------------|
| Unassigned | | | | |
| Assign Resource | Delivery to Toronto Zoo | Toronto Zoo, Toronto, ON, Canada, Toronto, M1B 3S4, ON, CAN | Aug 21 2017 08:30 AM | Aug 21 2017 09:00 AM |
| Assign Resource | Job Site 230 - Equipment Pick-up | 302 Hoover Park Drive, Whitchurch-Stouffville, L4A 1K5, ON, CAN | Aug 21 2017 10:21 AM | Aug 22 2017 01:21 PM |
| Dispatched | | | | |
| Alex Dobie | STATUS HISTORY TAB | Silver Dart Drive, Mississauga, ON, CAN | Aug 21 2017 09:21 AM | Aug 21 2017 10:21 AM |
| ADY BARR | CI Headquarters | 375 Cochrane Drive, Markham, L3R 0R1, ON, CAN | Aug 21 2017 03:19 PM | Aug 21 2017 04:19 PM |
| ADY BARR | Activity #816 | 88 Queens Boulevard, 11375, NY, USA | Aug 22 2017 11:00 AM | Aug 22 2017 01:00 PM |
| Poopa Padia | CI Headquarters | 475 Cochrane Drive, Markham, L3R 0R1, ON, CAN | Aug 22 2017 01:00 PM | Aug 22 2017 04:00 PM |
| Alex Dobie | Task Tracker sync | Canada's Wonderland Drive, Vaughan, ON, CAN | Aug 22 2017 03:47 AM | Aug 22 2017 03:47 PM |
| Poopa Padia | CI Headquarters | 475 Cochrane Drive, Markham, L3R 0R1, ON, CAN | Aug 23 2017 12:00 PM | Aug 23 2017 02:00 PM |
| In Progress | | | | |

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

Activity Screen

Edit Activity - 50846 - Rejected

TASK DETAILS

Date & Time

From: Jan 11, 2018 10:04 pm

To: Jan 11, 2018 10:04 pm

Activity Title*
TextDK014

Street Number and Name*
711 Baylston Street

Address 2

City*
Boston

State*
Massachusetts

Country*
United States

Contact Name*
DK

Phone Number*
11111111

Notes

STATUS HISTORY

Resource
Julian

Activity Pronto Form*
PT 1

View Text PT 1

Text PT 2

Text PT 3

34

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

Dispatching Forms

Let's take a look at how to dispatch a form in Pronto Forms Web



Overview:

- Read the slide.

Dispatch from Pronto Web

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



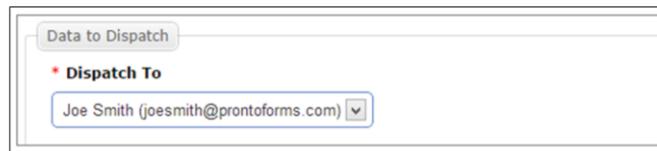
36

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.**

Dispatch from Pronto Web

2. First, select a user to dispatch the form to



The screenshot shows a form titled "Data to Dispatch". Inside the form, there is a section labeled "* Dispatch To" with a dropdown menu. The dropdown menu is open, showing the selected option "Joe Smith (joesmith@prontoforms.com)".

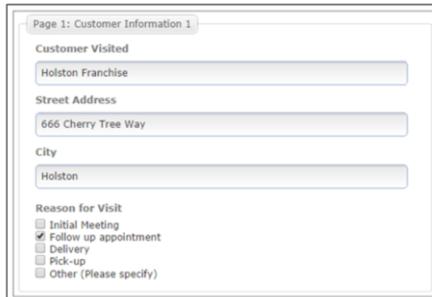
37

Overview:

- Read the slide.

Dispatch from Pronto Web

3. Fill out any fields you want pre-filled for the user, leave all other fields blank



Page 1: Customer Information 1

Customer Visited
Holston Franchise

Street Address
666 Cherry Tree Way

City
Holston

Reason for Visit

- Initial Meeting
- Follow up appointment
- Delivery
- Pick-up
- Other (Please specify)

38

Overview:

- Read the slide.

Dispatch from Pronto Web

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



39

Overview:

- Read the slide.

Dispatch Metadata with Pronto Web

It is possible to dispatch data into the following fields:

- Notes: These can be a maximum of 256 characters
- Priority: This can be Low, Normal or High. If you do not assign a priority it will default to Normal or No Priority
- Due Date: If you do not supply a timezone, it will default to the dispatcher's team timezone
- Location: Type in an address, and the Web

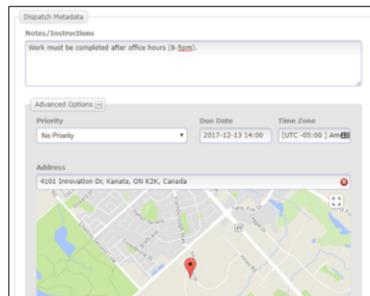
40

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.



The screenshot shows a 'Dispatch Metadata' form. It includes a 'Notes/Instructions' field with the text 'Work must be completed after office hours (8-5pm)'. Below this is an 'Advanced Options' section with three columns: 'Priority' (set to 'No Priority'), 'Due Date' (set to '2017-12-13 14:00'), and 'Time Zone' (set to 'UTC-05:00 | AM'). At the bottom, there is an 'Address' field with the text '4101 Immigration Dr, Kanata, ON K2K, Canada' and a map view showing a red location pin on a street map.

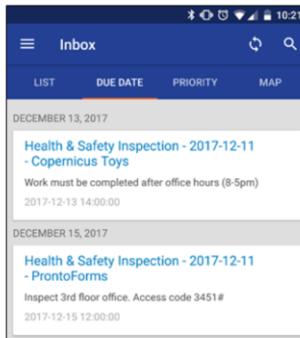
41

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.

Mobile Application

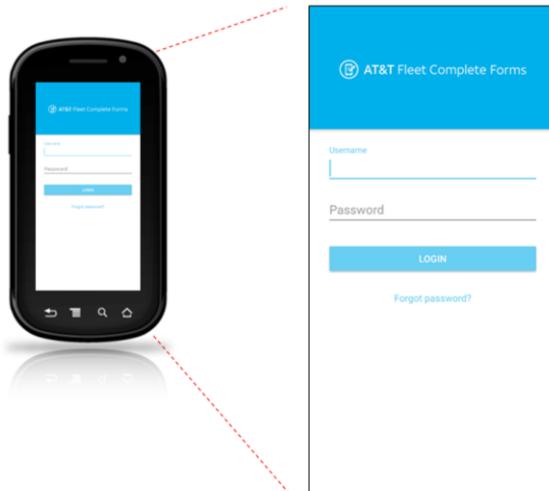
Let's take a look at how to access the mobile application



Overview:

- Read the slide.

Mobile App. Login Page



44

Overview:

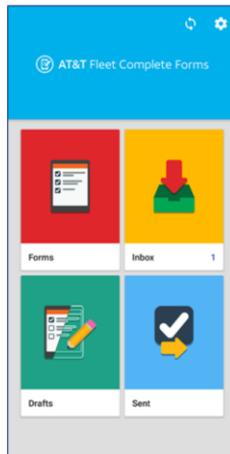
- The Pronto Forms mobile application can be downloaded from the Google Play or iTunes store from the mobile device.
- Resources need to log in to the Pronto Forms application with their username and password that was sent in the welcome email to their email address by their **Administrator**.

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.

Fill Out a Form



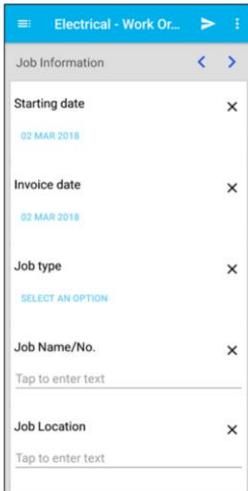
1. Navigate to the Forms tab where all existing forms are listed
2. Tap the form you want to fill out to open it

46

Overview:

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

Fill Out a Form



The screenshot shows a mobile application interface for a form titled "Electrical - Work Or...". The form is titled "Job Information" and contains five fields, each with a close button (X) on the right:

- Starting date**: A date selector showing "02 MAR 2018".
- Invoice date**: A date selector showing "02 MAR 2018".
- Job type**: A dropdown menu with the text "SELECT AN OPTION".
- Job Name/No.**: A plain text input field with the placeholder text "Tap to enter text".
- Job Location**: A plain text input field with the placeholder text "Tap to enter text".

- 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** display as a black line.
- **Dropdown controls** display as a blue rectangle.
- **Date/time selectors** display as a blue rectangle.
- **Question behaviors** affect how you interact with questions.

47

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

The screenshot shows a mobile application interface for a form titled "Electrical - Work Or...". The form is titled "Job Information" and has navigation arrows at the top. It contains the following fields:

- Starting date**: 02 MAR 2018
- Invoice date**: 02 MAR 2018
- Job type**: SELECT AN OPTION
- Job Name/No.**: Tap to enter text
- Job Location**: Tap to enter text

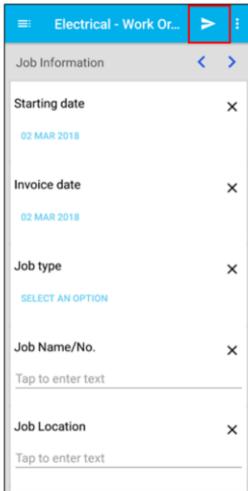
- To navigate between pages, touch and swipe
- Swipe left to go to the next page
- Swipe right to go to the previous page
- Or use the left and right arrows at the top of the page

48

Overview:

- Read the Slide.

Submit a Form



The screenshot shows a mobile application interface for a form titled "Electrical - Work Or...". At the top right, there is a blue button with a white paper plane icon, which is highlighted with a red box. Below the header, the form is titled "Job Information" and contains several fields, each with a close button (X) on the right:

- Starting date**: 02 MAR 2018
- Invoice date**: 02 MAR 2018
- Job type**: SELECT AN OPTION
- Job Name/No.**: Tap to enter text
- Job Location**: Tap to enter text

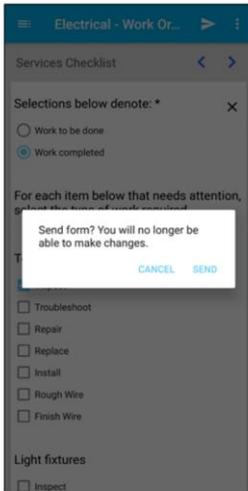
- Tap the Send button at the top right of the page to submit the form
- Once a form is submitted, no changes can be made to it

49

Overview:

- Read the Slide.

Submit a Form



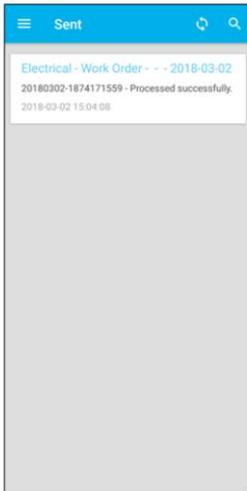
- The app will reconcile after you submit the form, and you will be notified when the form is available in Pronto Forms web

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.

View Sent Forms



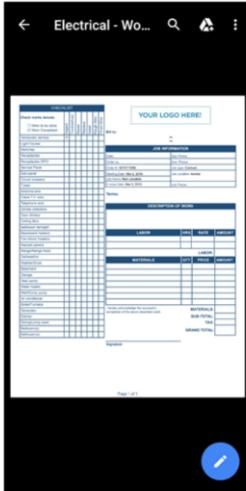
- Tap on the form for options
- The form will be downloaded as a PDF
- The form will open on your device

52

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

53

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!