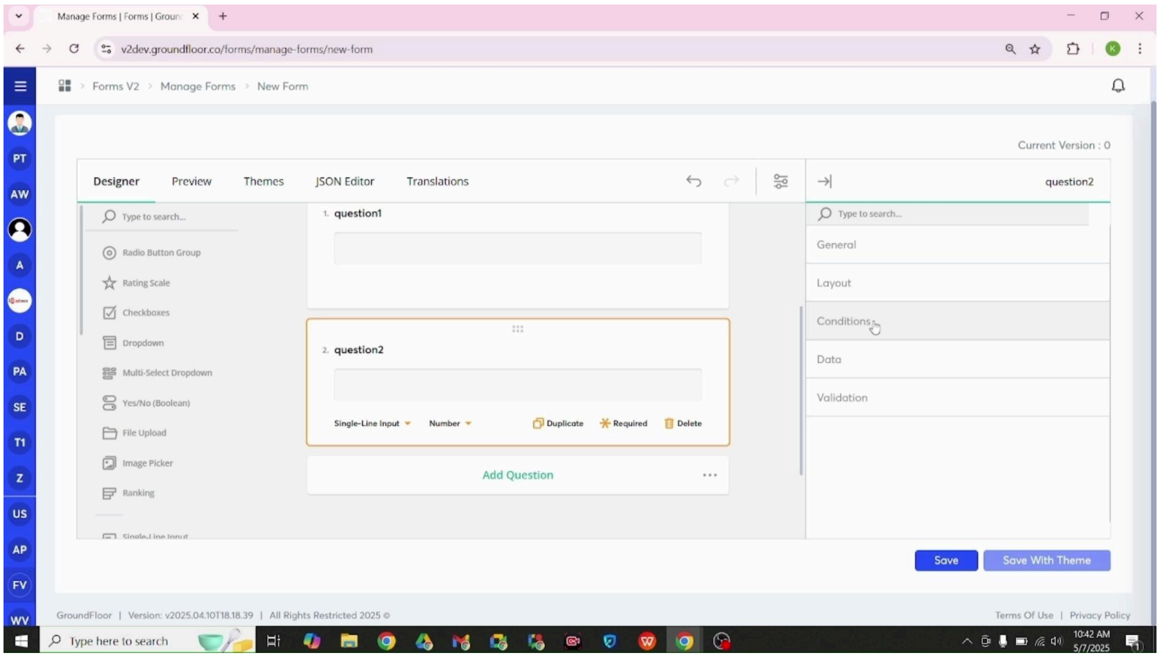
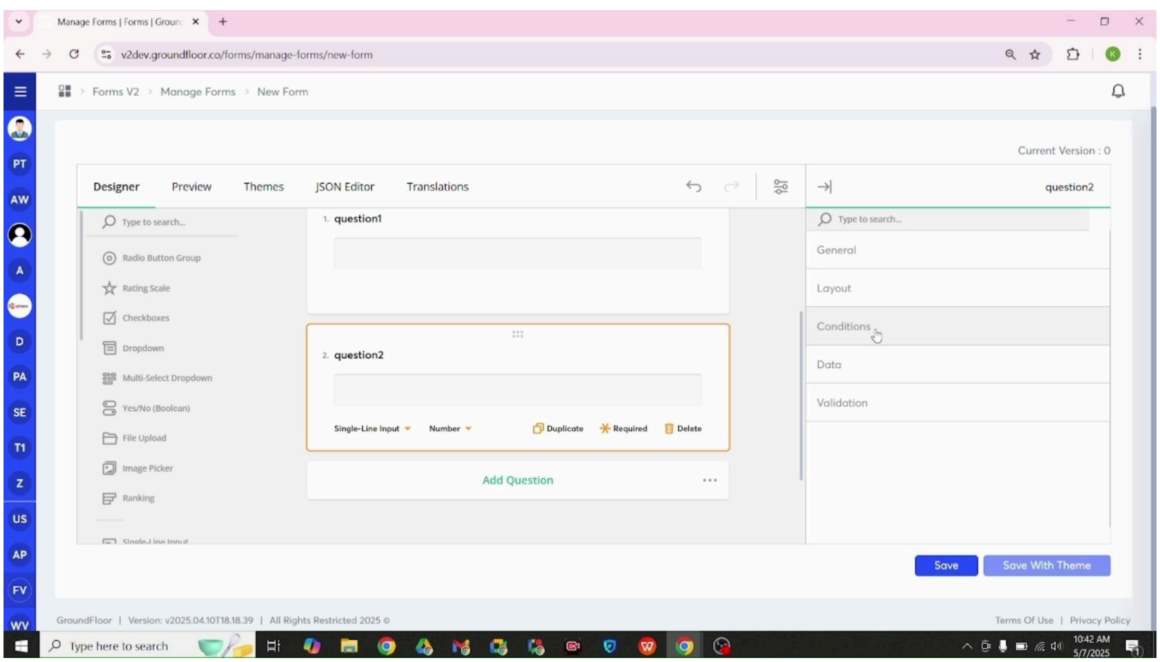
Step 1: Set Condition for Question Visibility

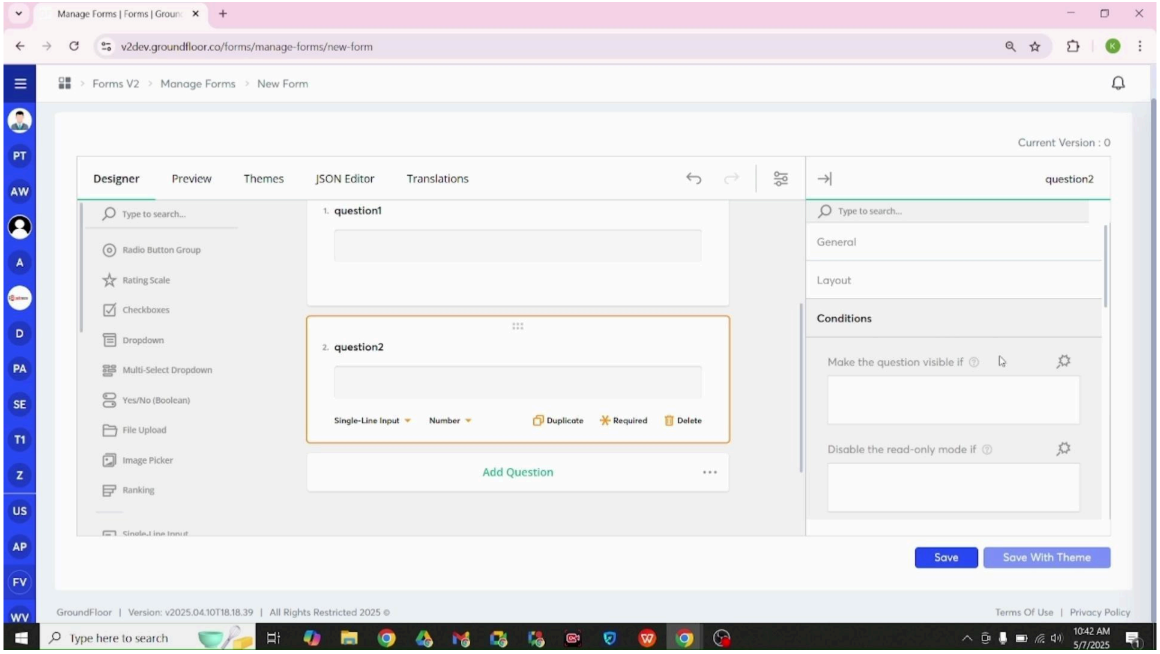
1. In the form designer, select the question you want to apply the condition to (e.g., "question2").



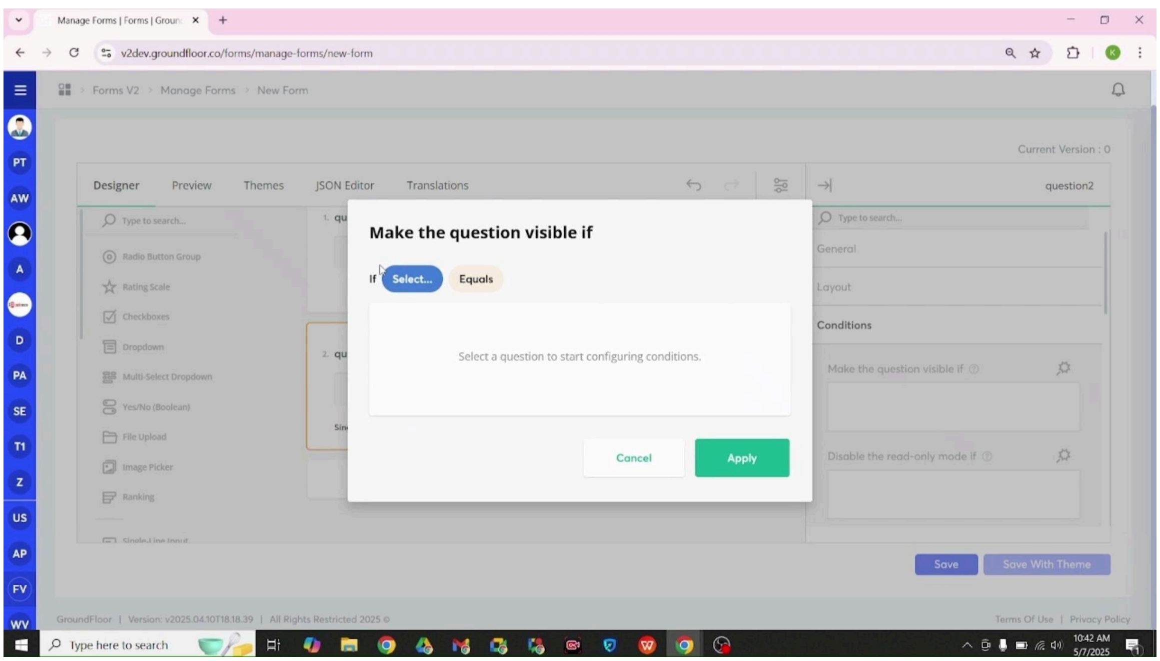
2. On the right-hand panel, expand the "Conditions" section.



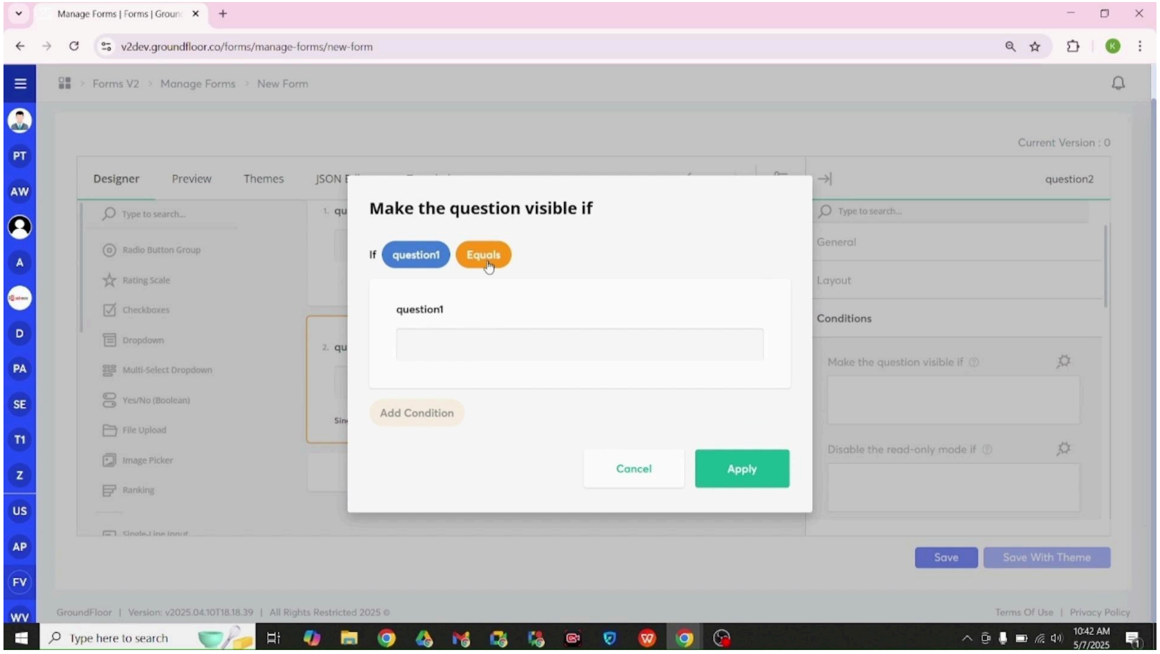
3. Under "Make the question visible if", click the settings icon.



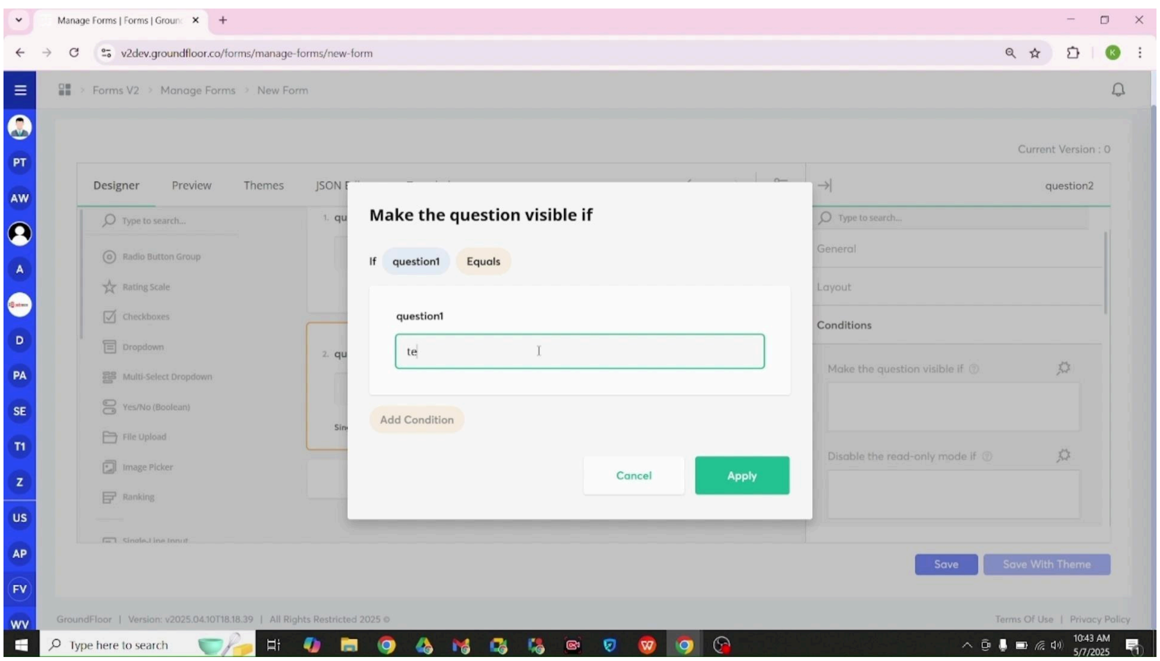
4. In the "Make the question visible if" pop-up, click "Select..." to choose the question that will trigger the condition (e.g., "question1").



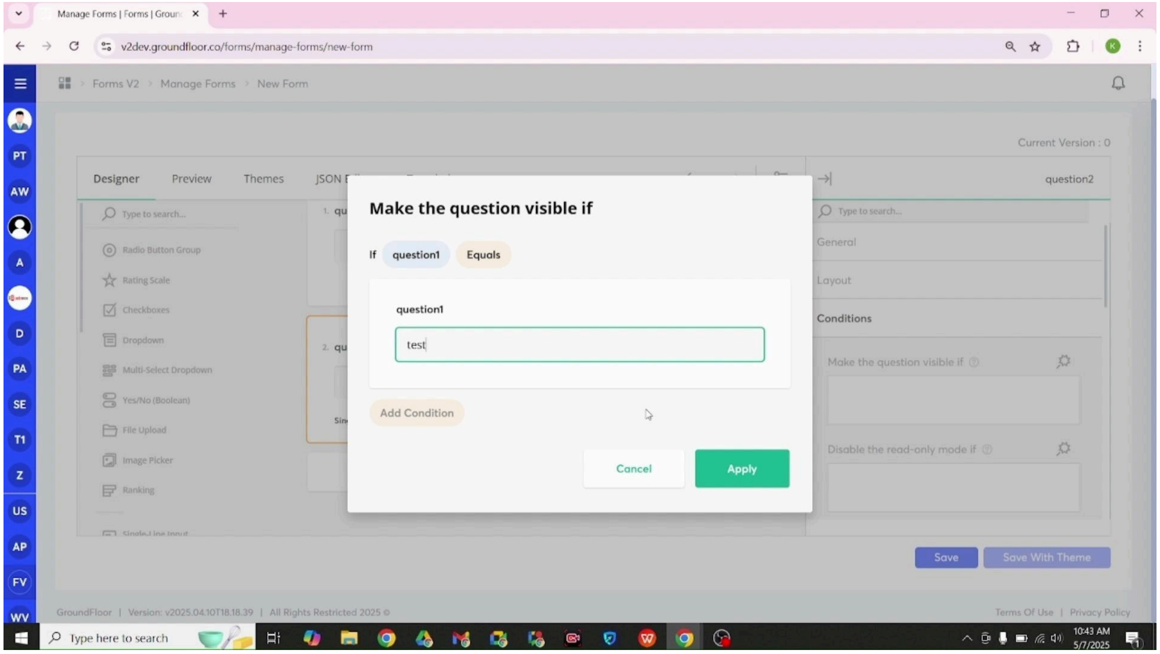
5. Select the condition type (e.g., "Equals").



6. Enter the value that "question1" must equal for "question2" to be visible (e.g., "test").

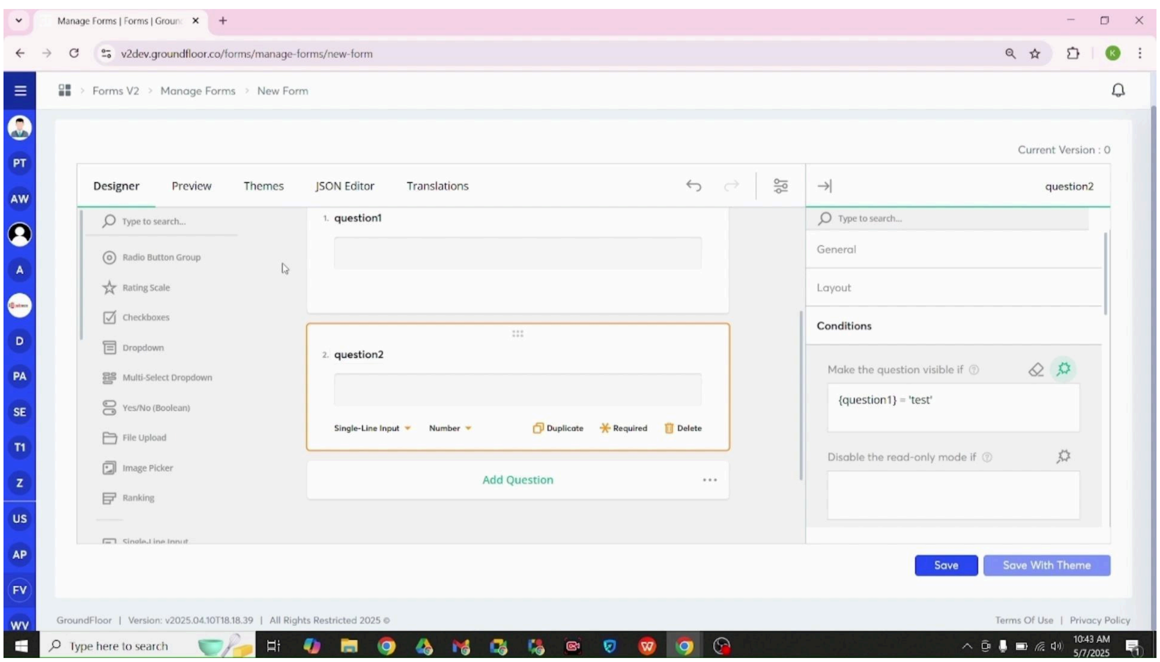


7. Click "Apply".

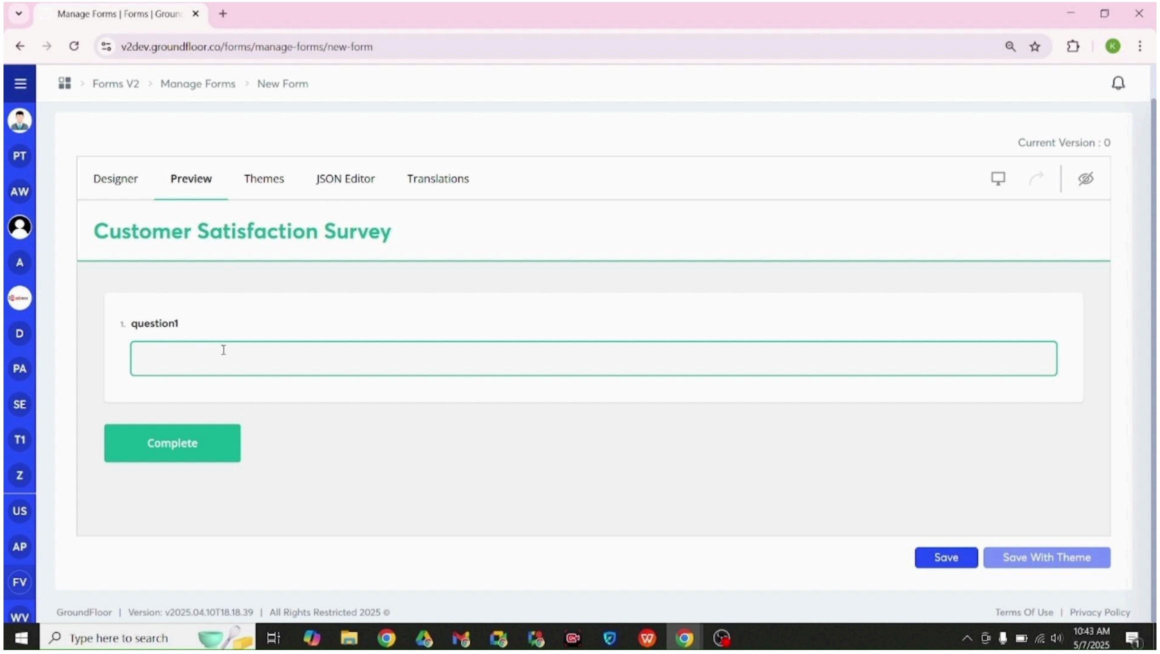


Step 2: Preview Form with Visibility Condition

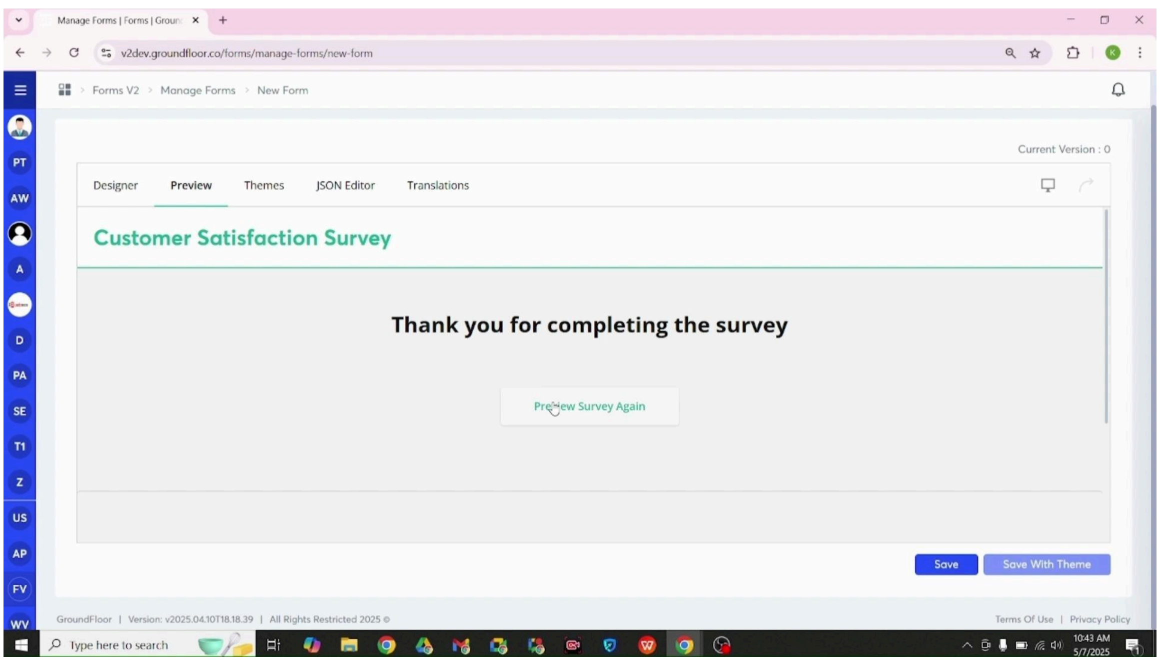
8. Click on the "Preview" tab.



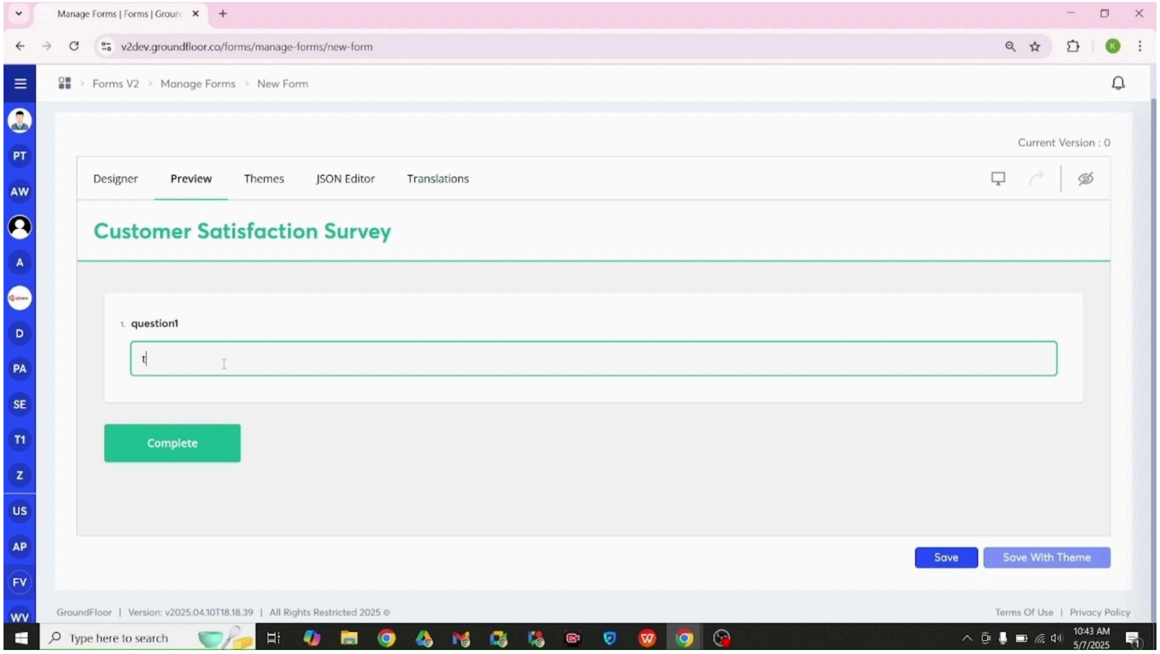
9. If "question1" is left empty or filled with a value other than "test" (e.g., "data") and "Complete" is clicked, the form will be submitted without showing "question2".



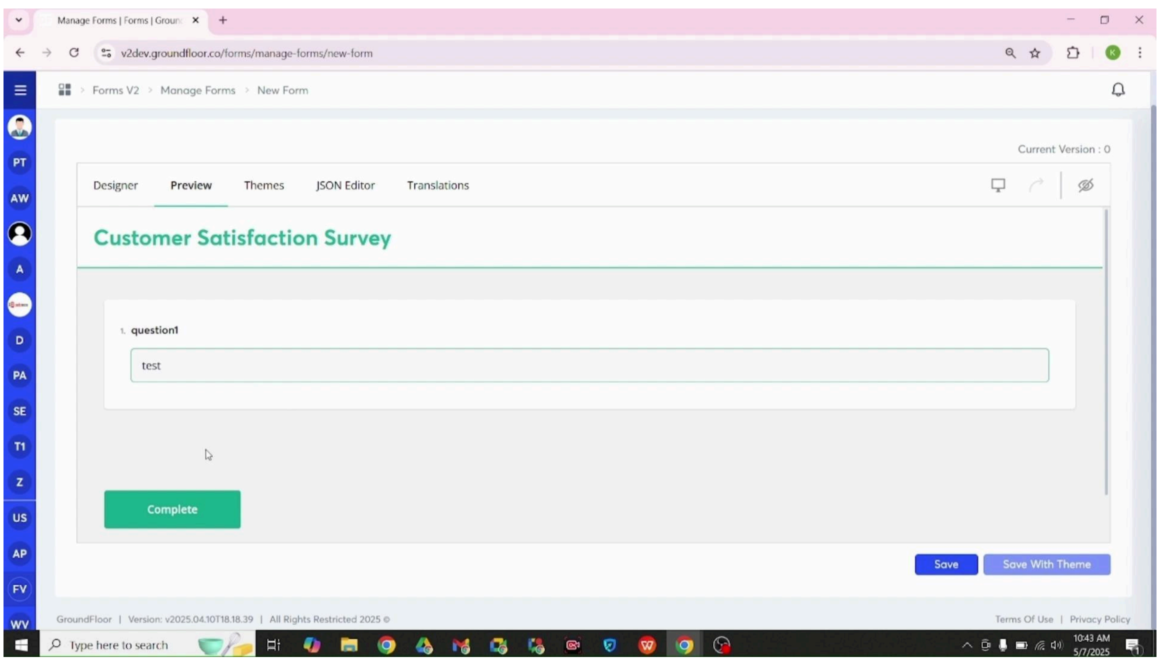
10. Click "Preview Survey Again".



11. Enter the conditional value ("test") into "question1".

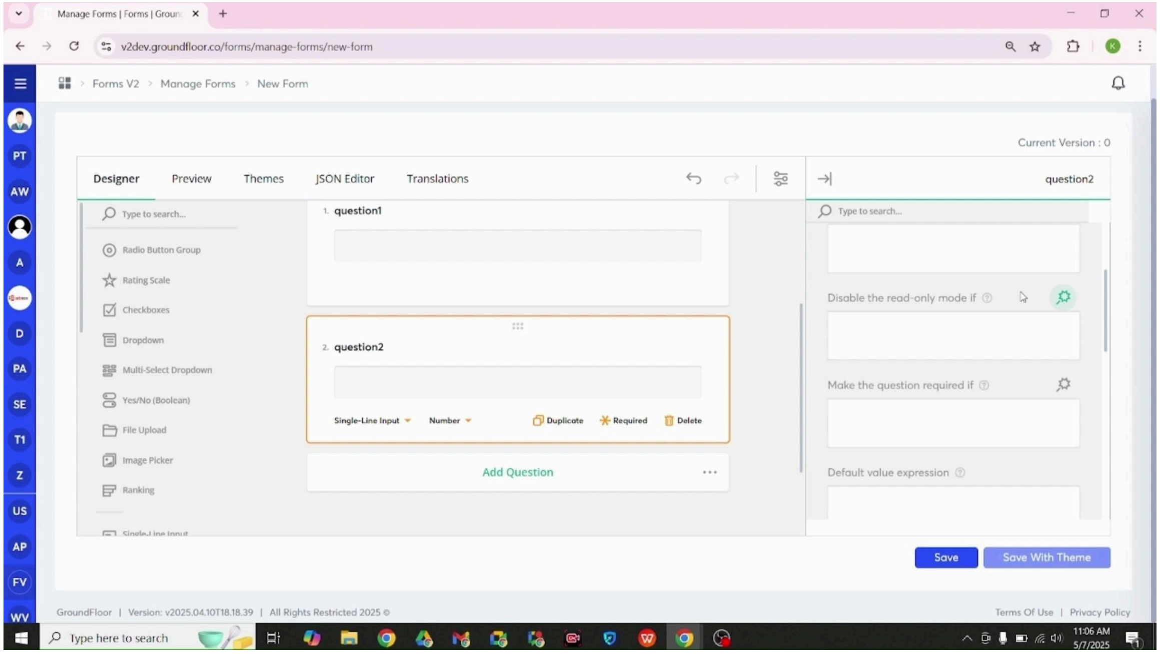


12. "question2" will now appear on the form.

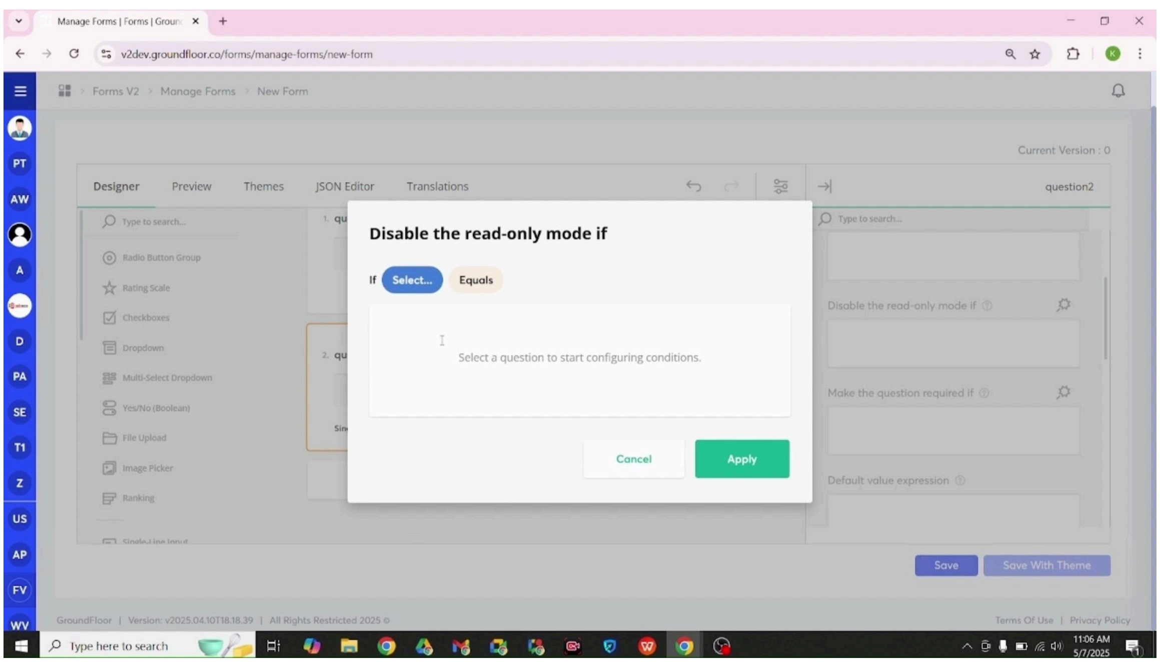


Step 1: Set Condition for Read-Only Mode

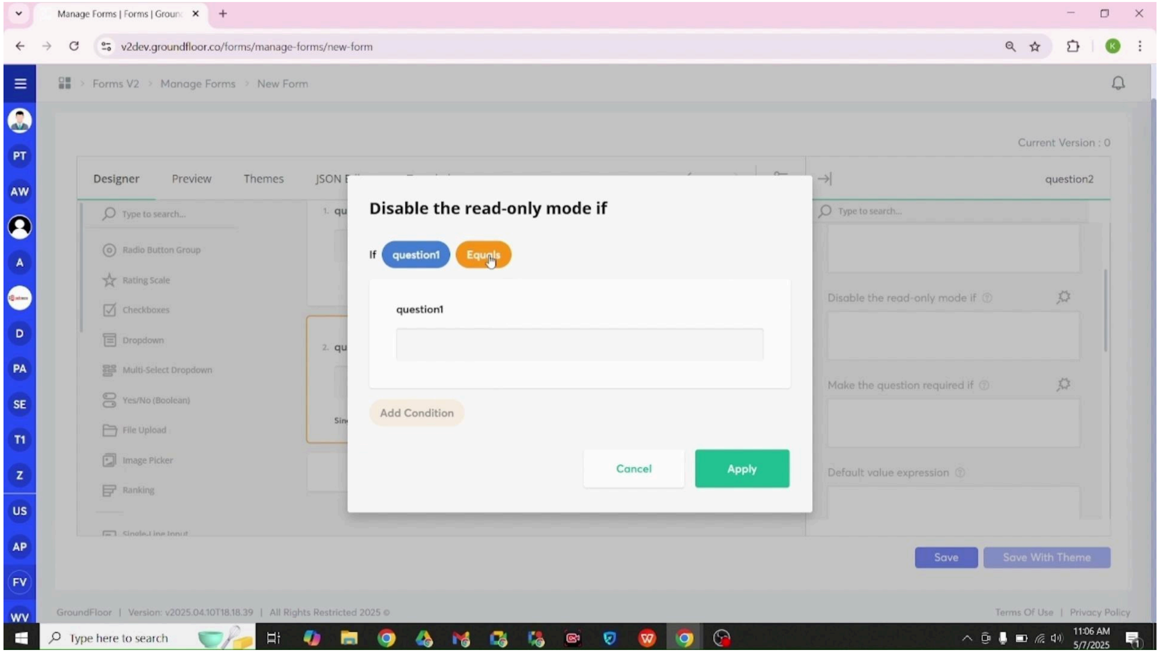
13. In the form designer, ensure "question2" is selected.
14. On the right-hand panel, under "Conditions", find "Disable the read-only mode if" and click the settings icon.



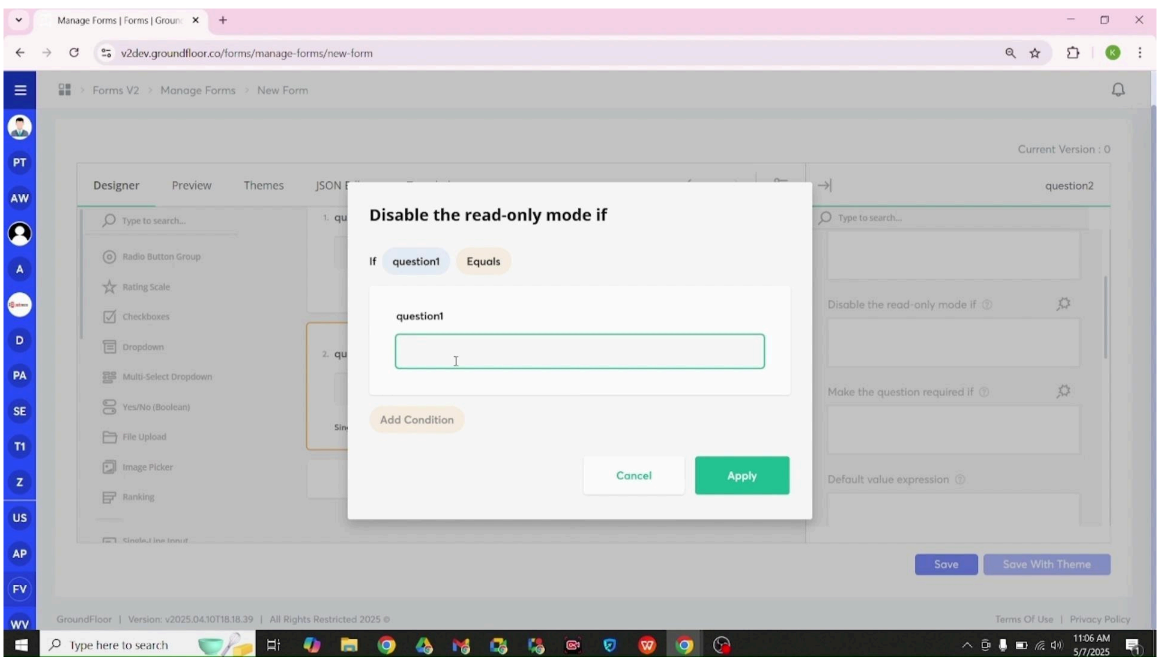
15. In the "Disable the read-only mode if" pop-up, click "Select..." and choose the trigger question (e.g., "question1").



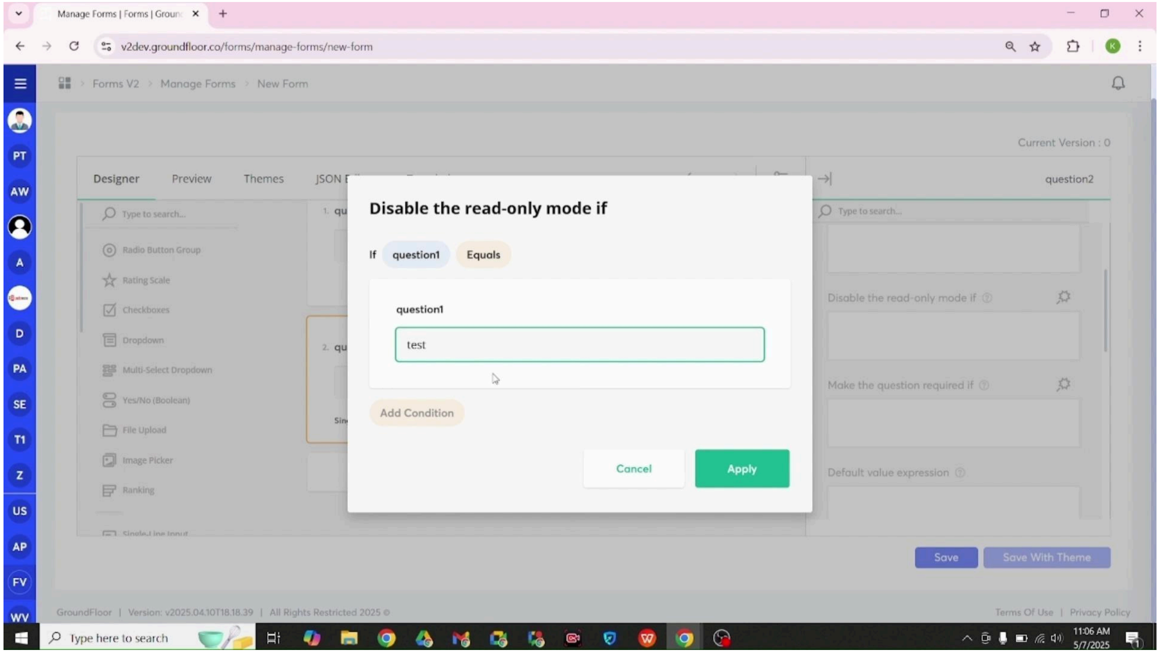
16. Select the condition type (e.g., "Equals").



17. Enter the value that "question1" must equal to disable read-only mode for "question2" (e.g., "test").

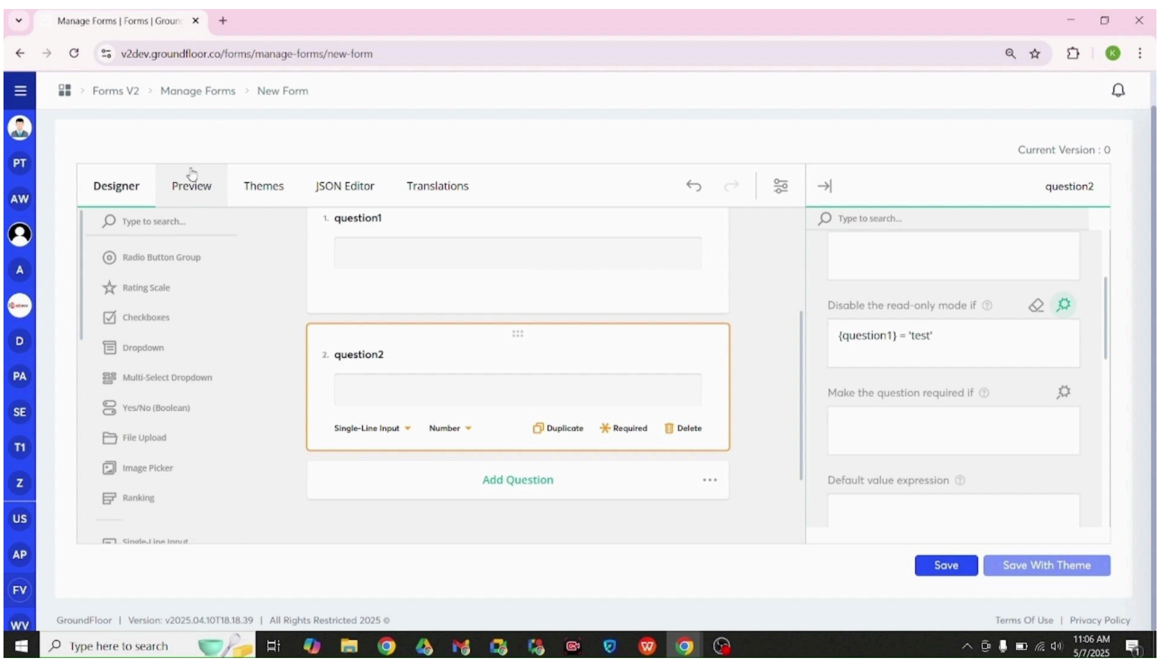


18. Click "Apply".

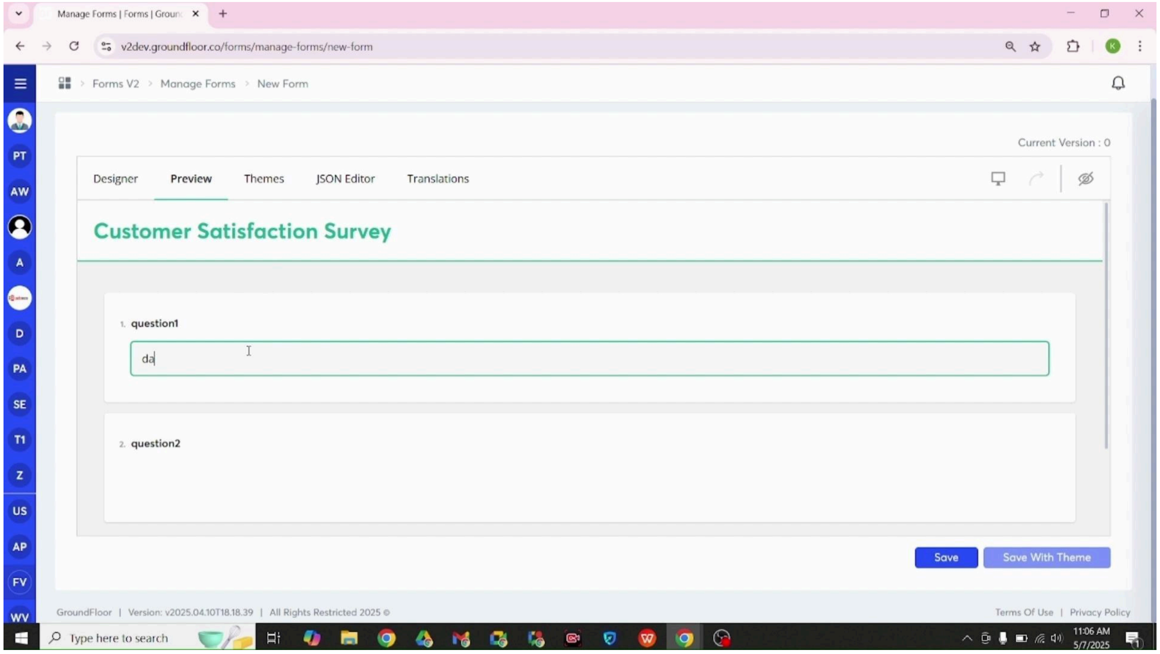


Step 2: Preview Form with Read-Only Condition

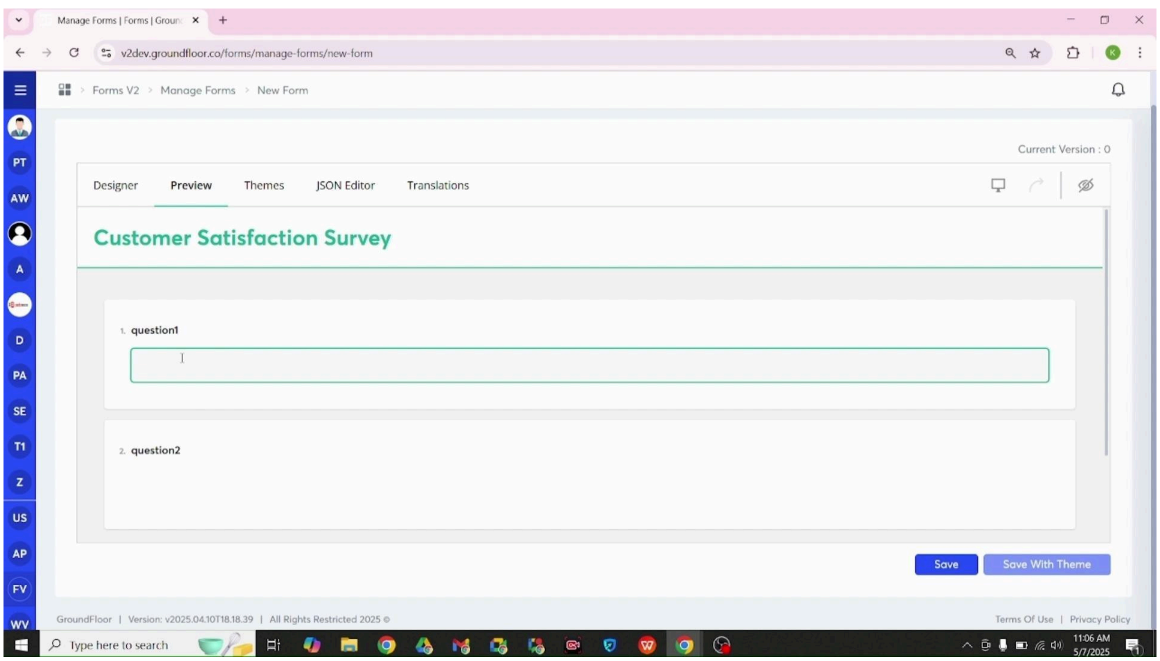
19. Click on the "Preview" tab.



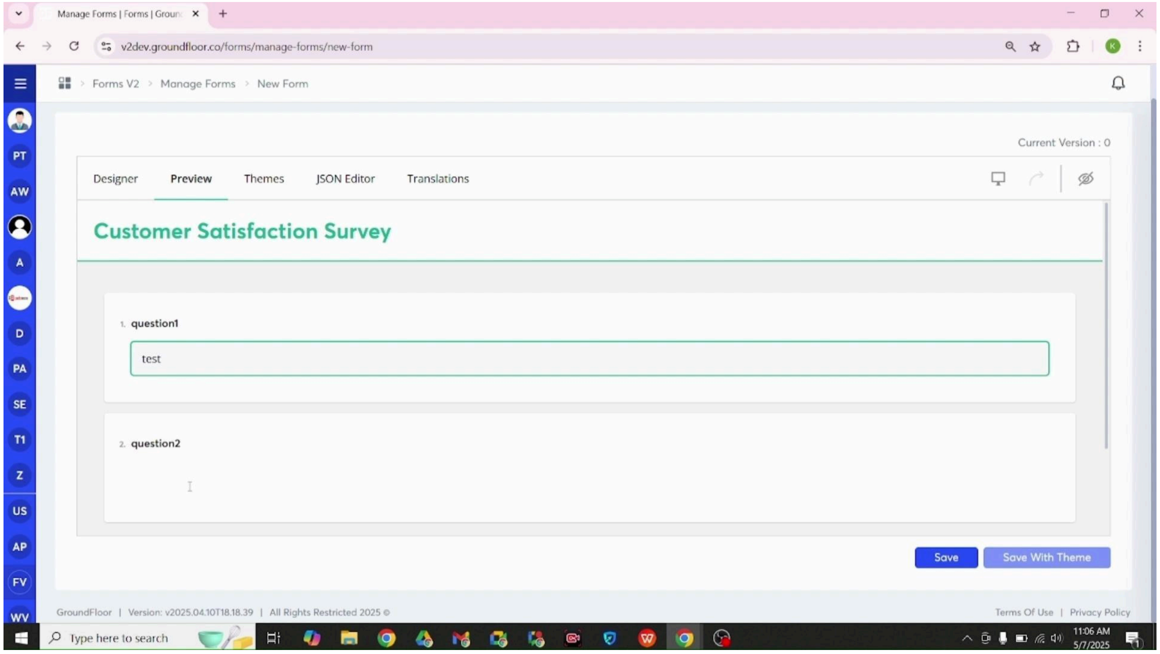
20. If "question1" is filled with a value other than "test" (e.g., "data"), "question2" will not be visible.



21. Enter the conditional value ("test") into "question1".

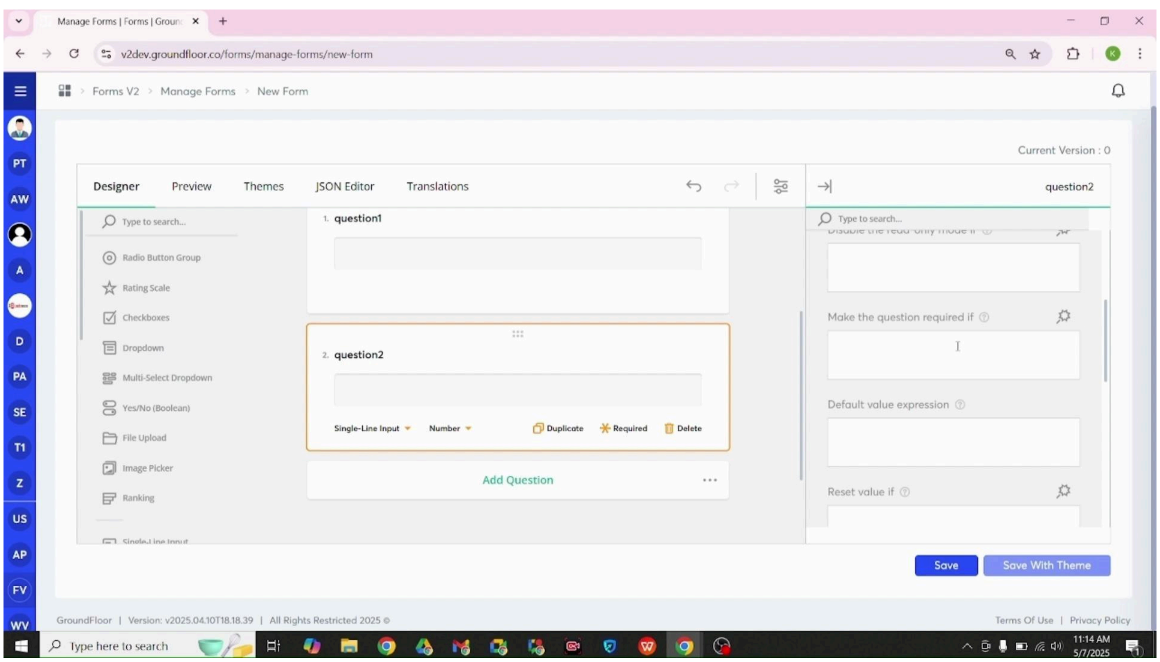


22. "question2" will appear and will be editable (not read-only).

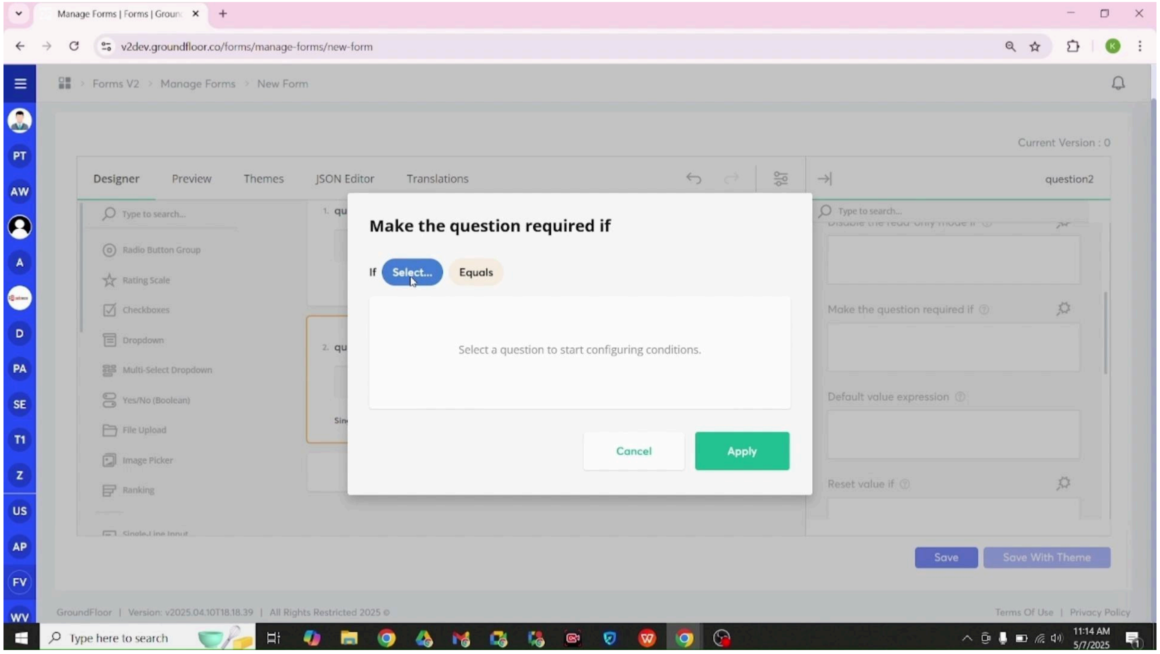


Step 1: Set Condition to Make Question Required

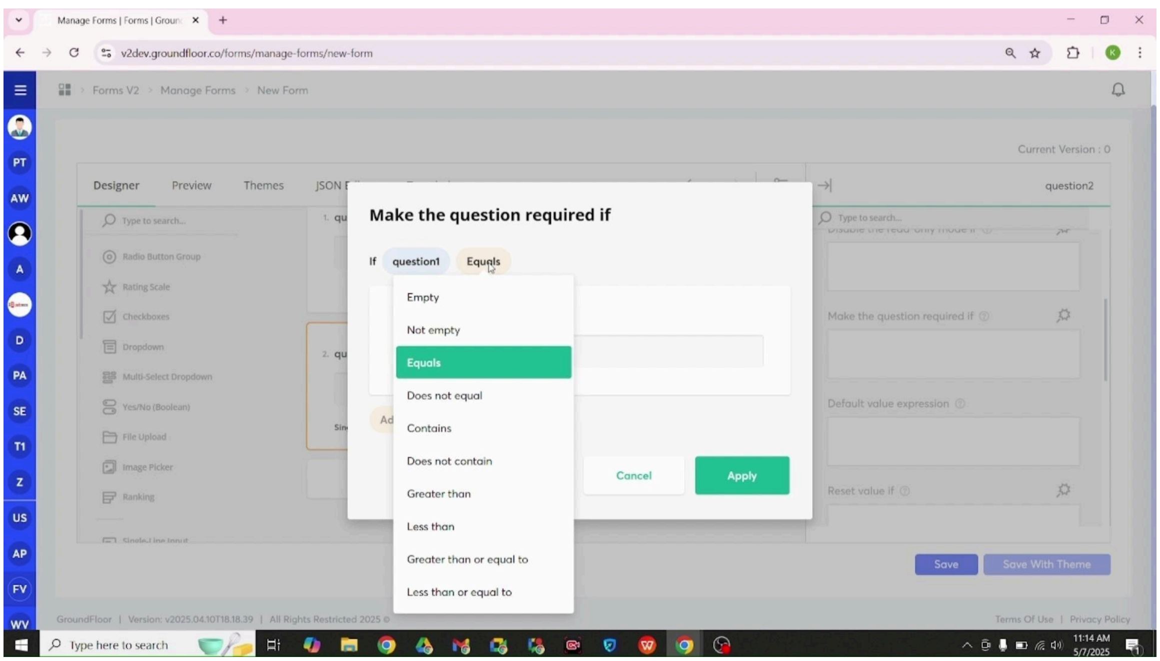
23. In the form designer, ensure "question2" is selected.
24. On the right-hand panel, under "Conditions", find "Make the question required if" and click the settings icon.



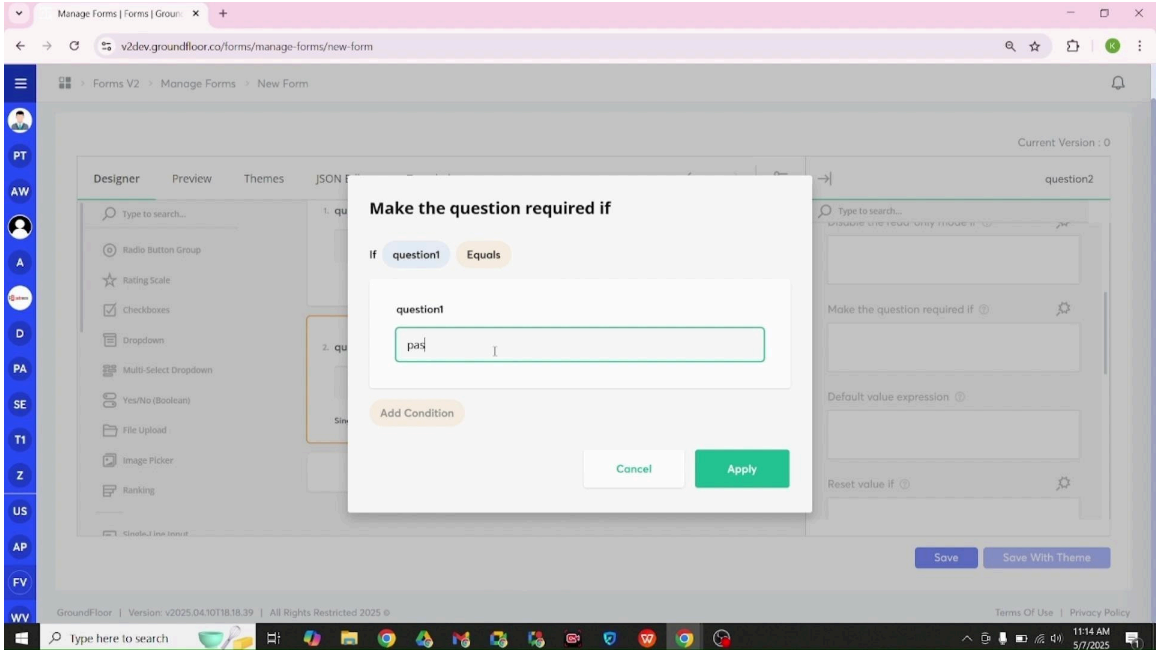
25. In the "Make the question required if" pop-up, click "Select..." and choose the trigger question (e.g., "question1").



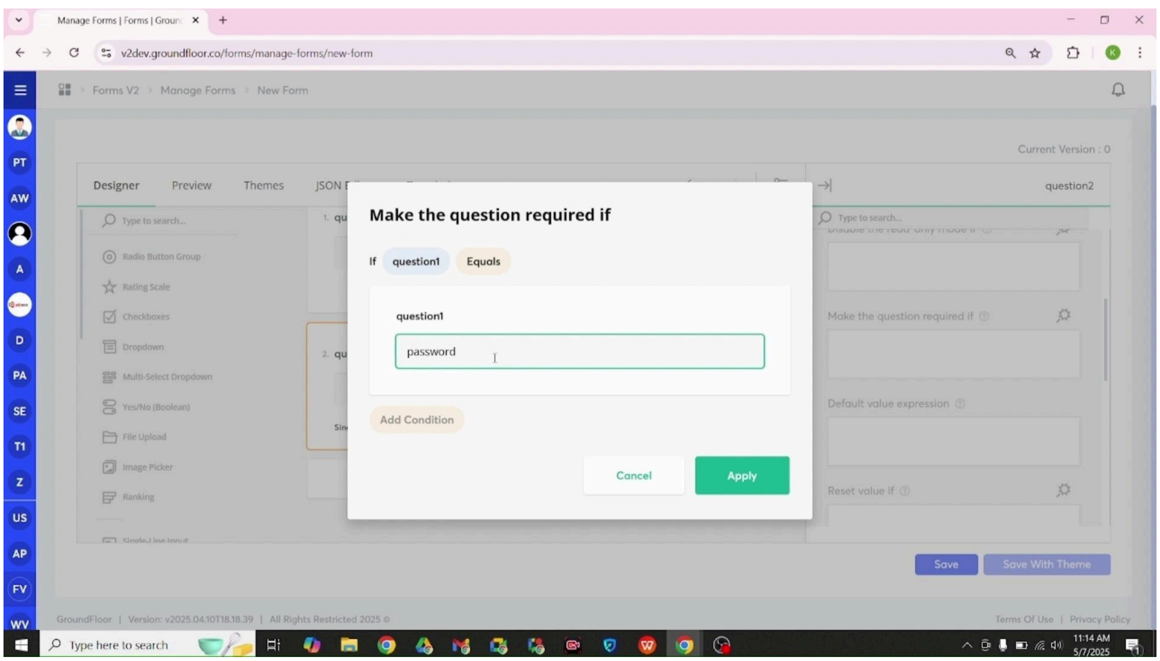
26. Select the condition type (e.g., "Equals").



27. Enter the value that "question1" must equal for "question2" to become required (e.g., "password").

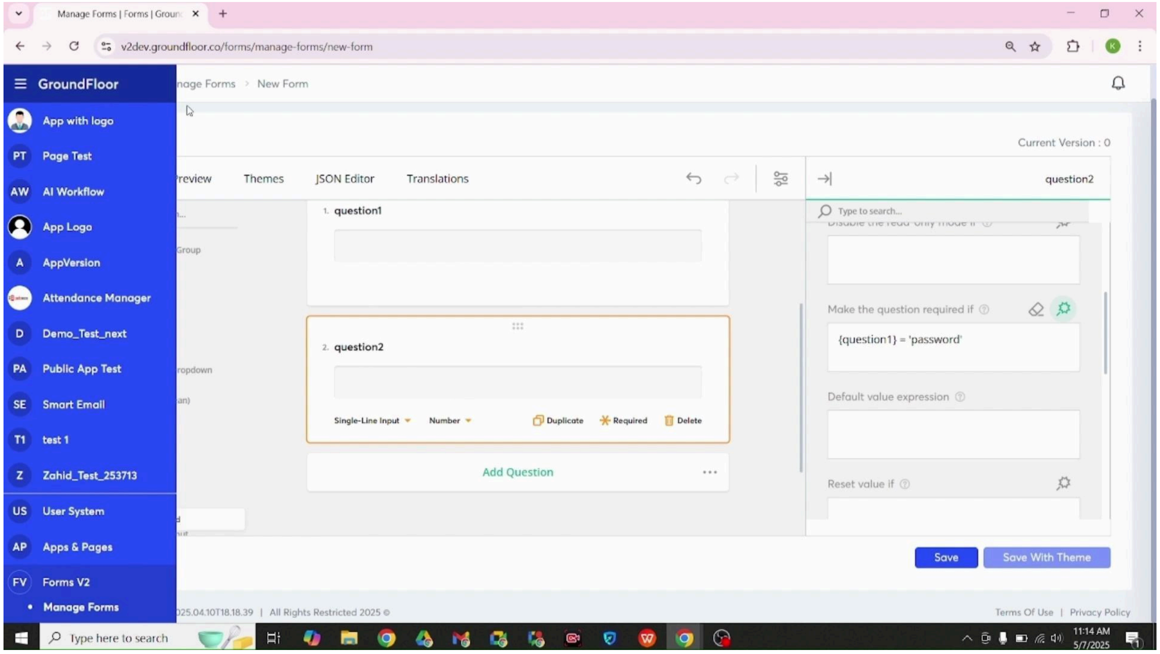


28. Click "Apply".

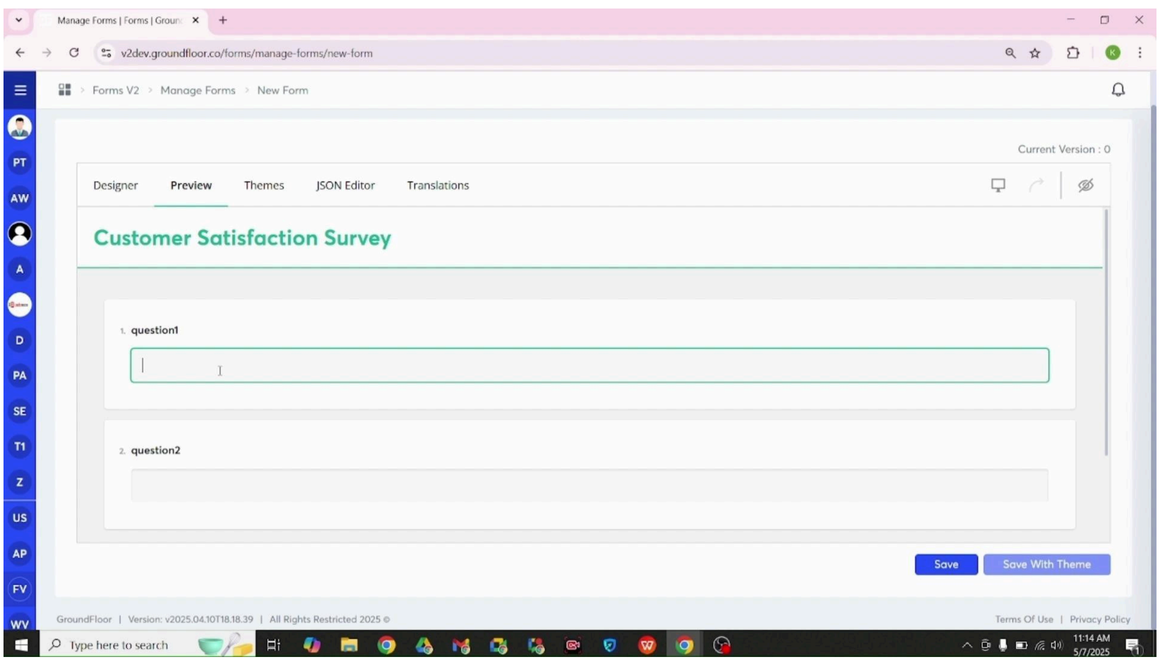


Step 2: Preview Form with Required Condition

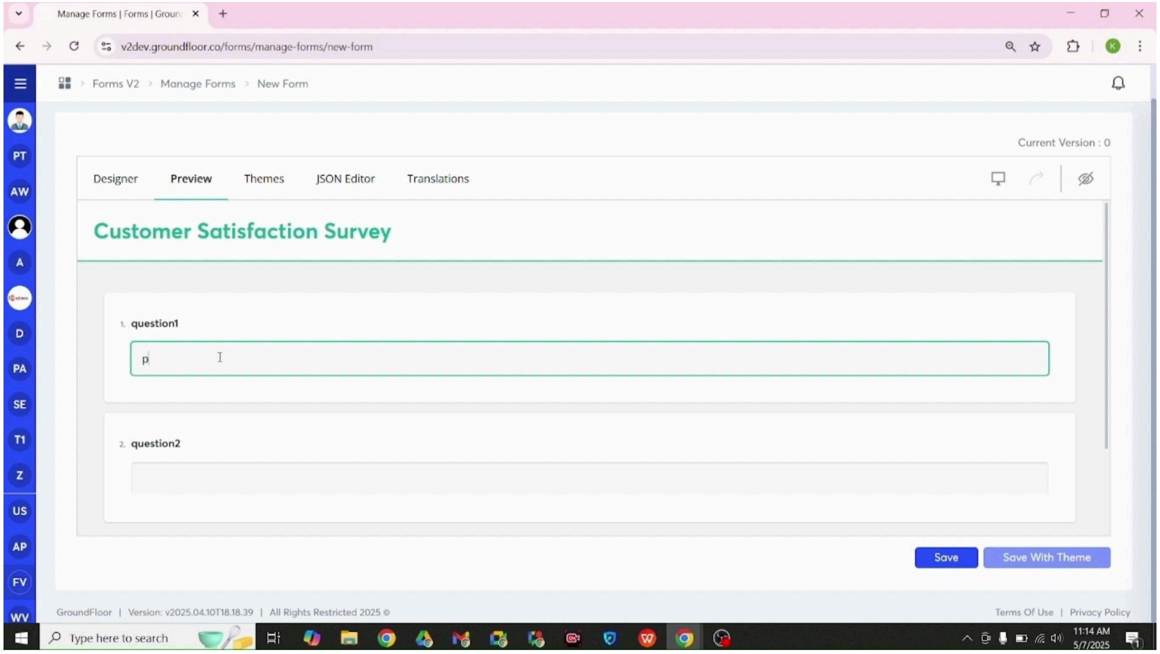
29. Click on the "Preview" tab.



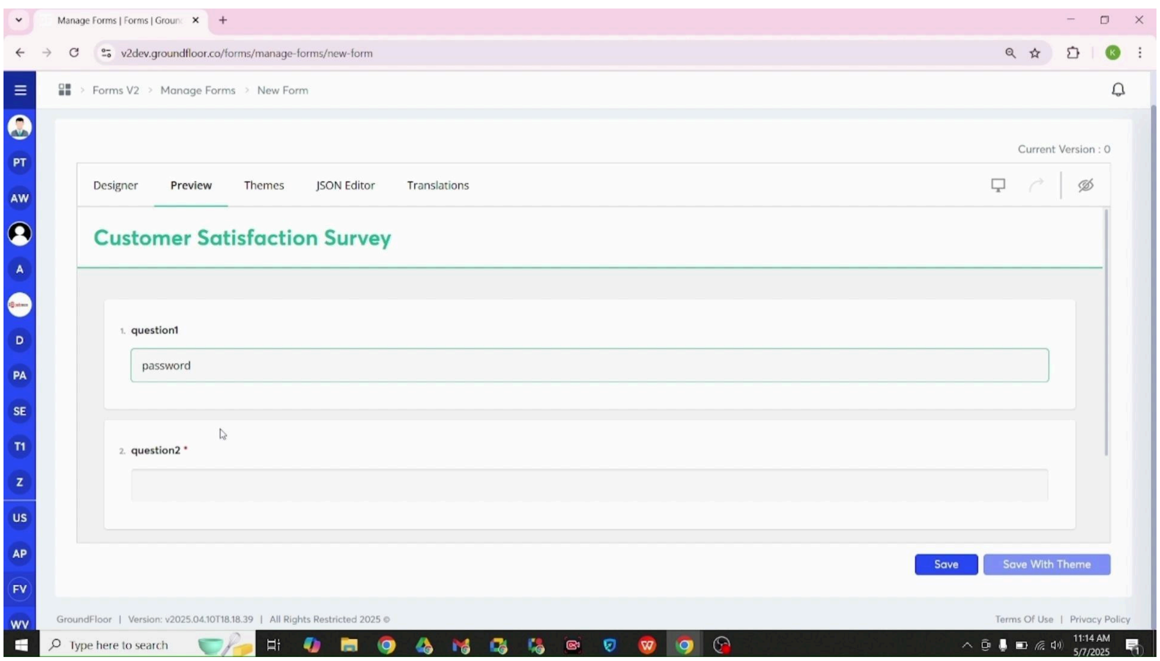
30. If "question1" is filled with a value other than "password" (e.g., "data"), "question2" will be visible but not marked as required.



31. Enter the conditional value ("password") into "question1".

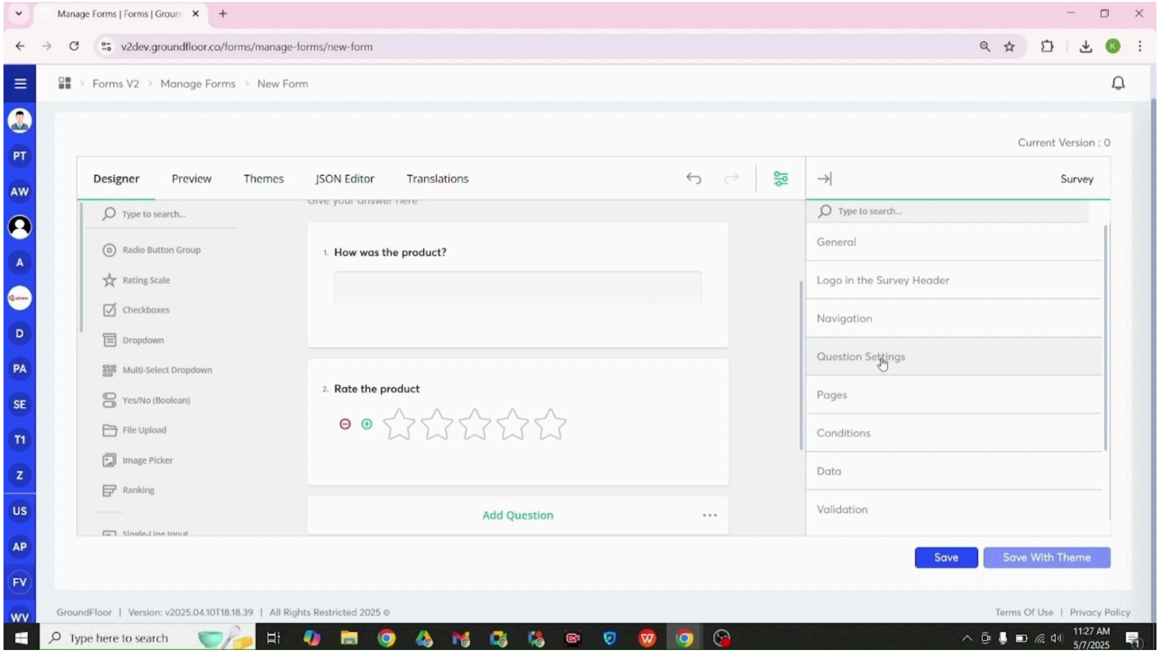


32. "question2" will now appear with a required indicator (e.g., an asterisk).



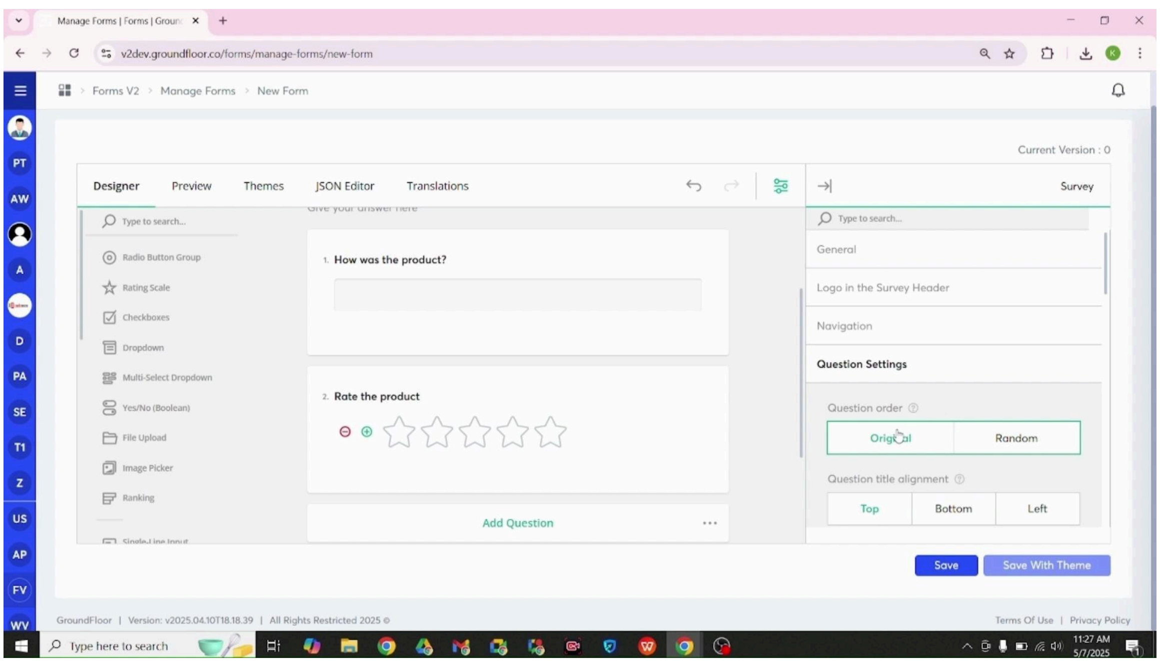
Step 1: Accessing Survey Level Question Settings

33. In the form designer, if no specific question is selected, the right-hand panel shows survey-level settings. Click on "Question Settings".

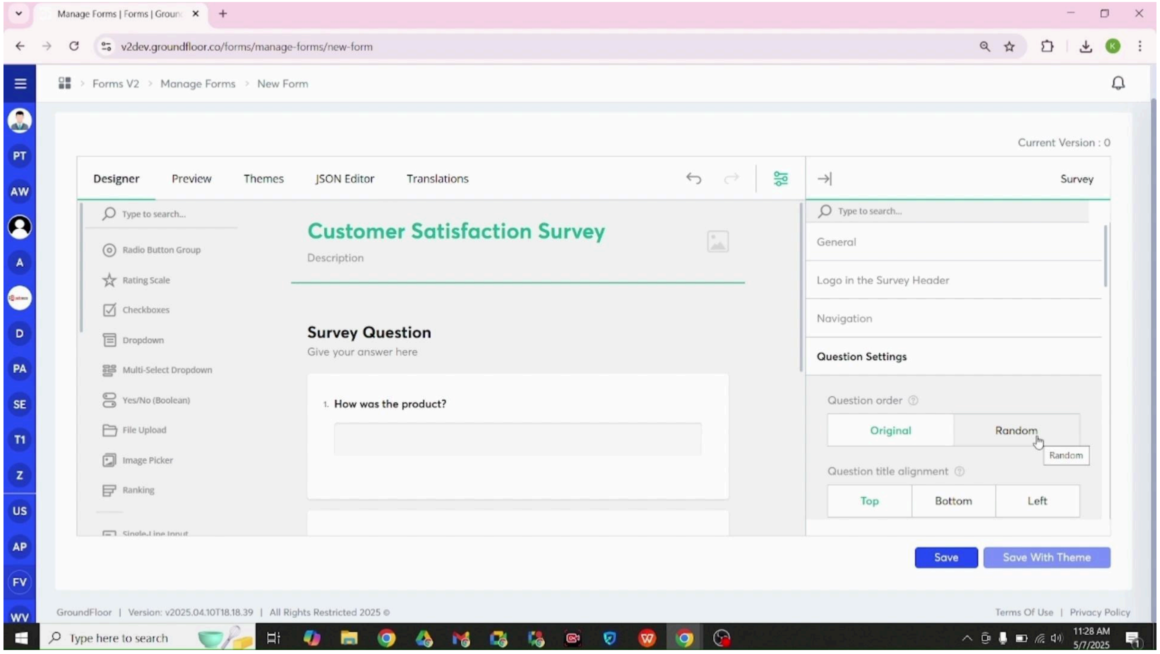


Step 2: Configure Question Order

34. Under "Question order", choose "Original" to display questions in the order they were added.

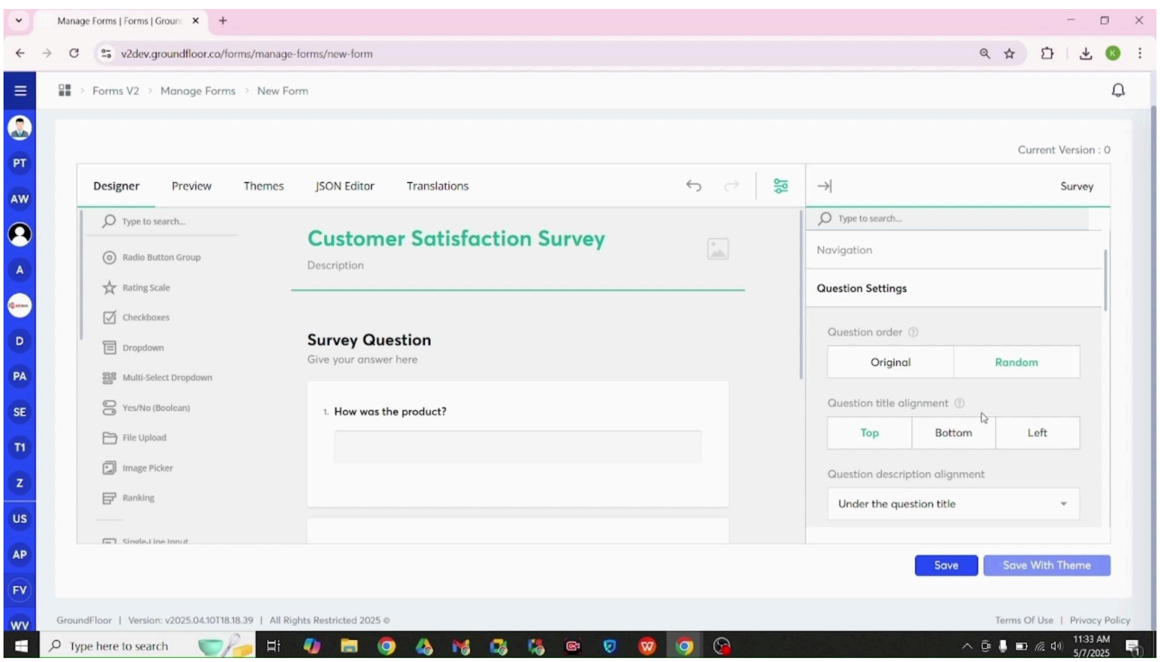


35. Choose "Random" to display questions in a random order each time the form is viewed.

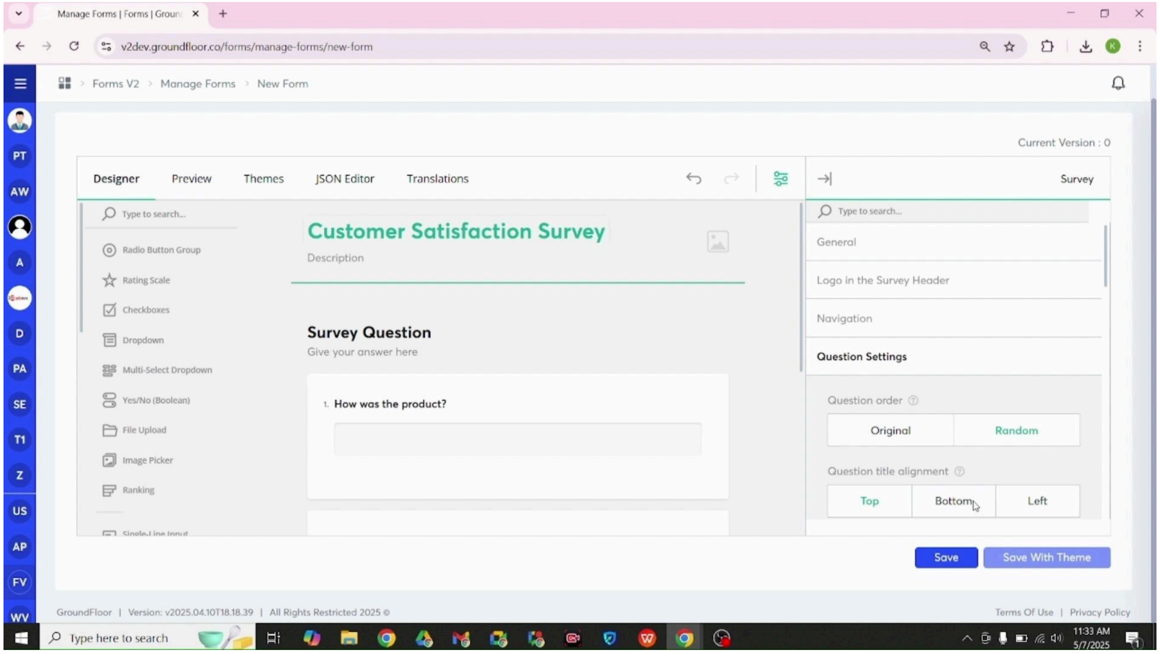


Step 3: Configure Question Title Alignment

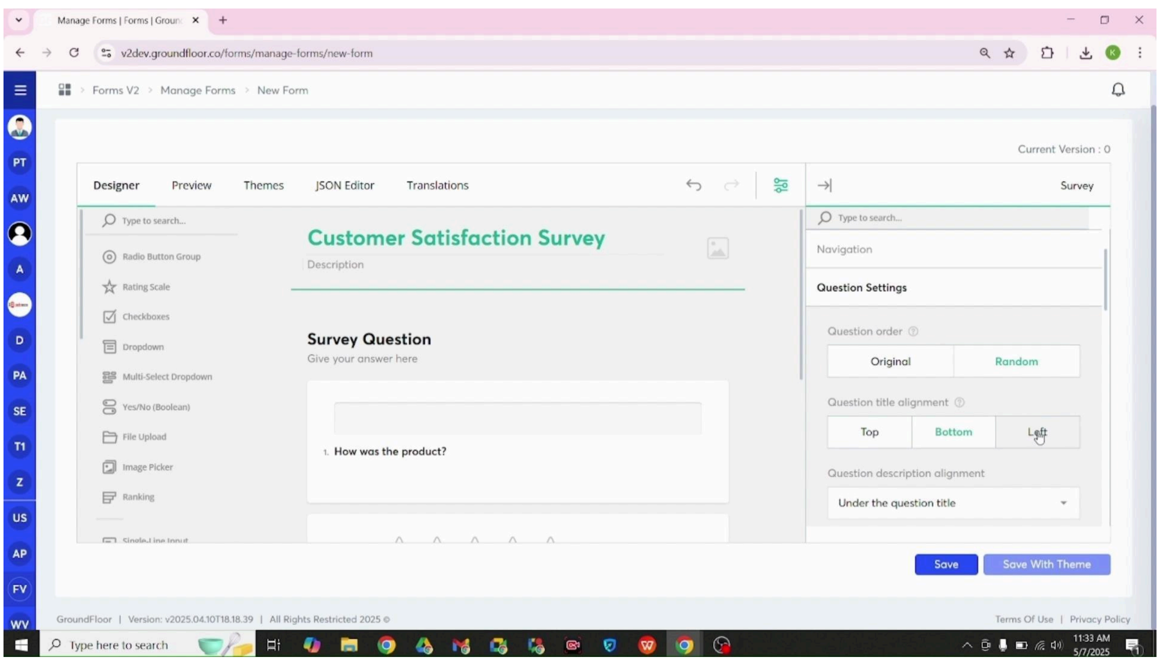
36. Under "Question title alignment", select "Top". The question title will appear above the input field.



37. Select "Bottom". The question title will appear below the input field.

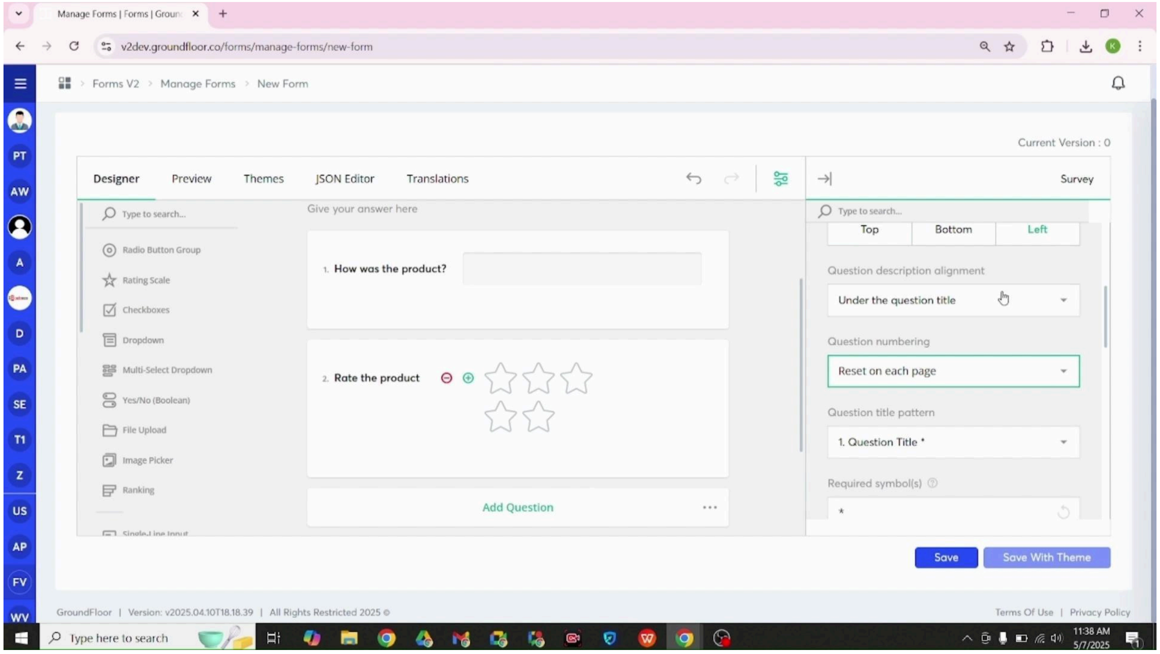


38. Select "Left". The question title will appear to the left of the input field.

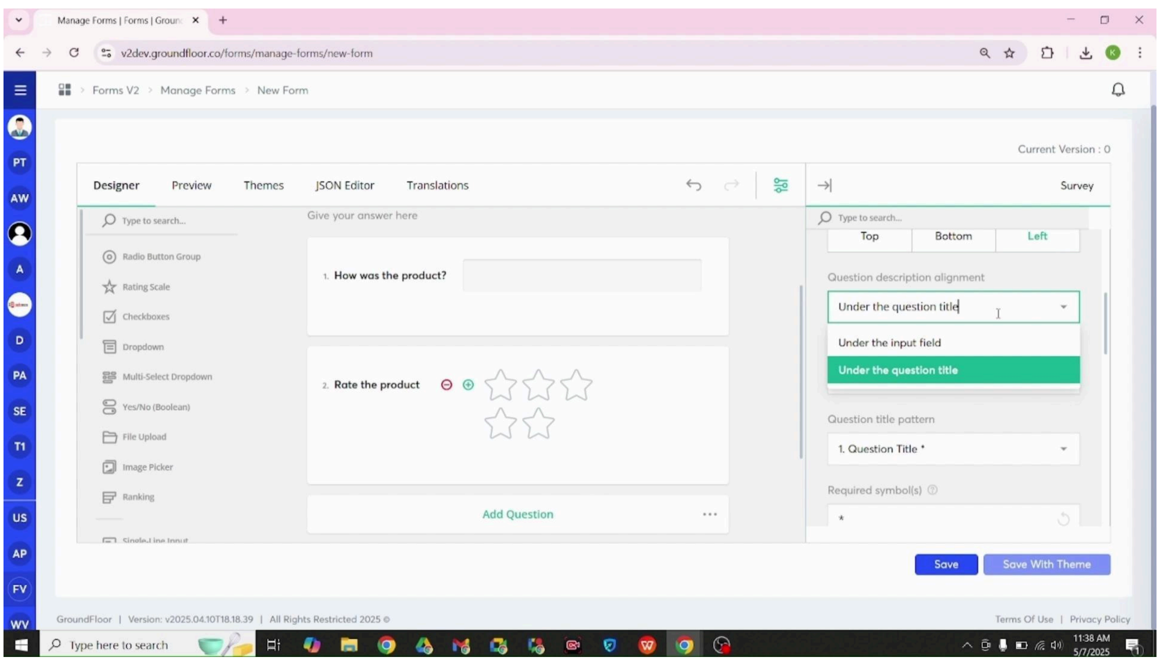


Step 4: Configure Question Description Alignment

39. Under "Question description alignment", select "Under the question title" to place the description below the title.

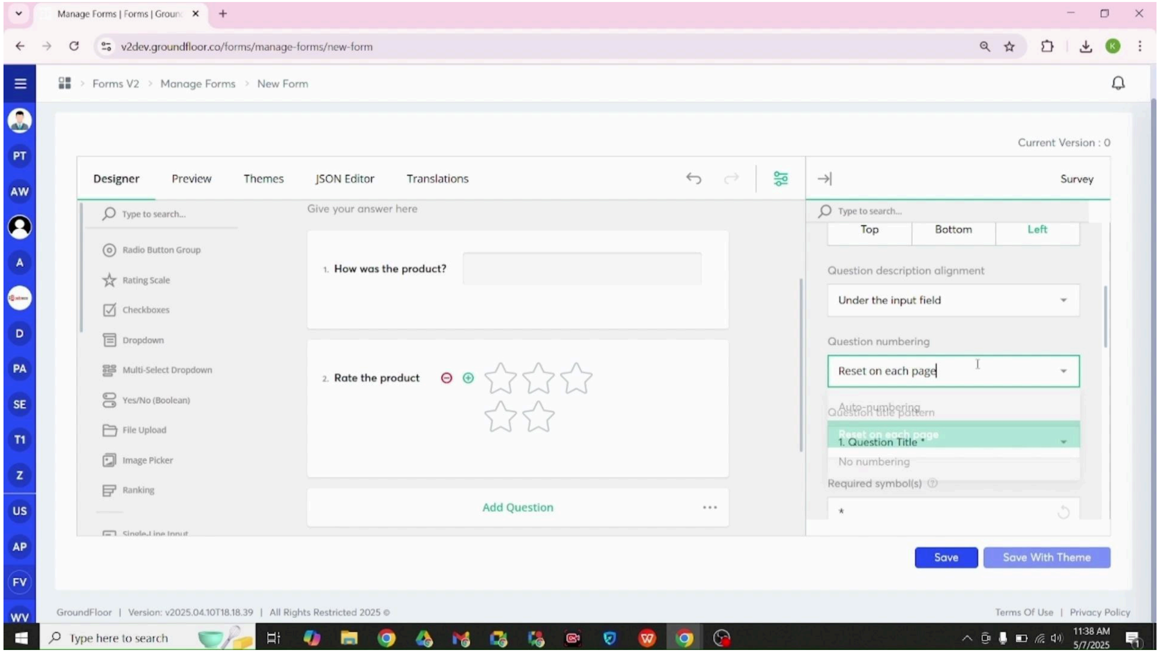


40. Select "Under the input field" to place the description below the input field.

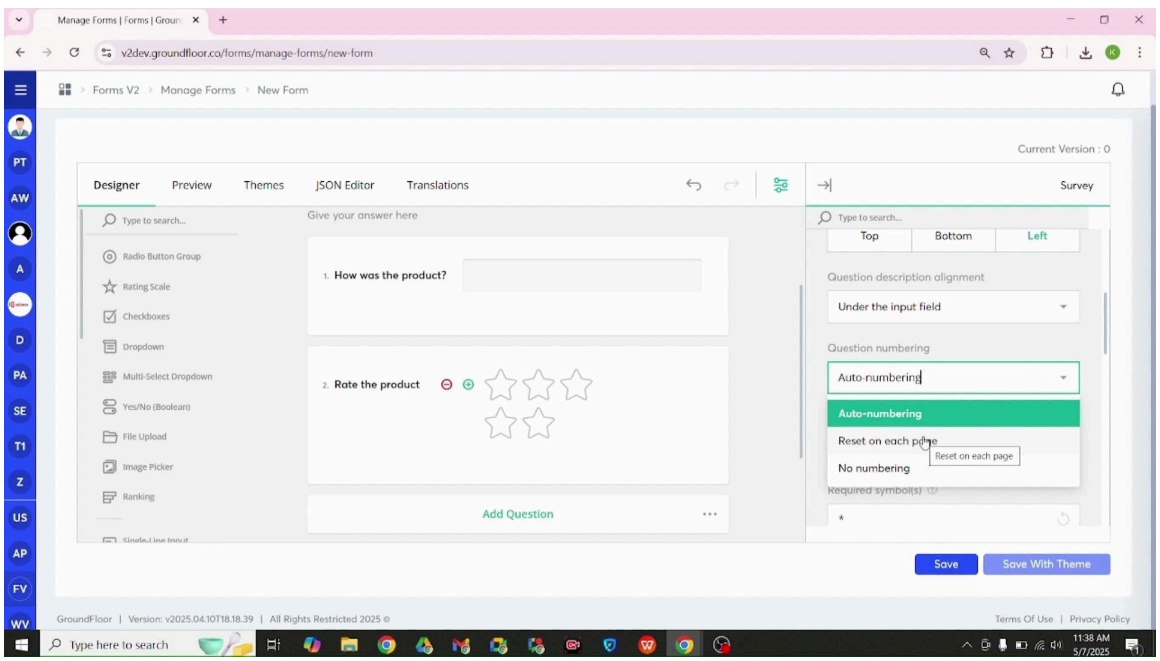


Step 5: Configure Question Numbering

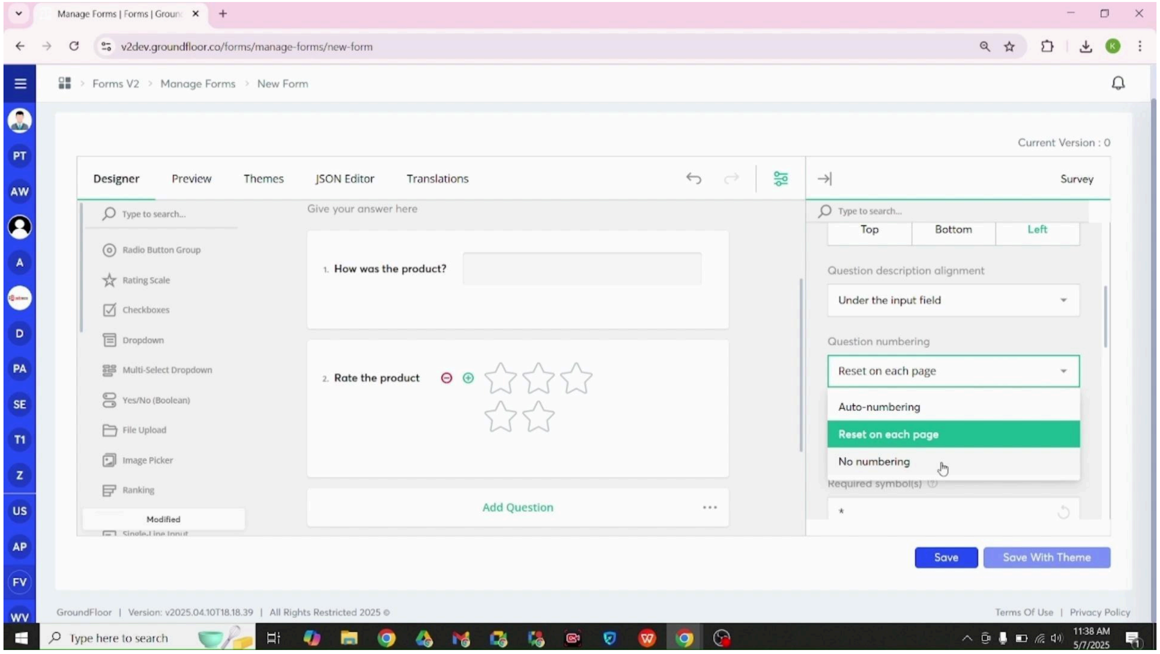
41. Under "Question numbering", select "Auto-numbering" for sequential numbering.



42. Select "Reset on each page" to restart numbering on each new page of the form.

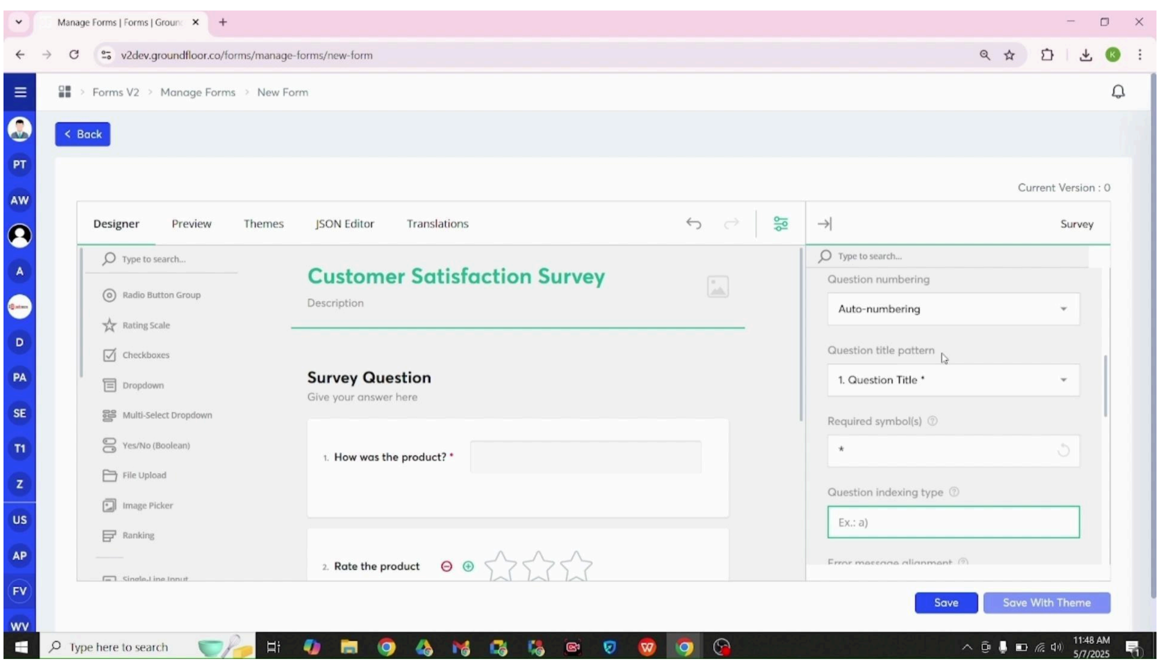


43. Select "No numbering" to remove question numbers.



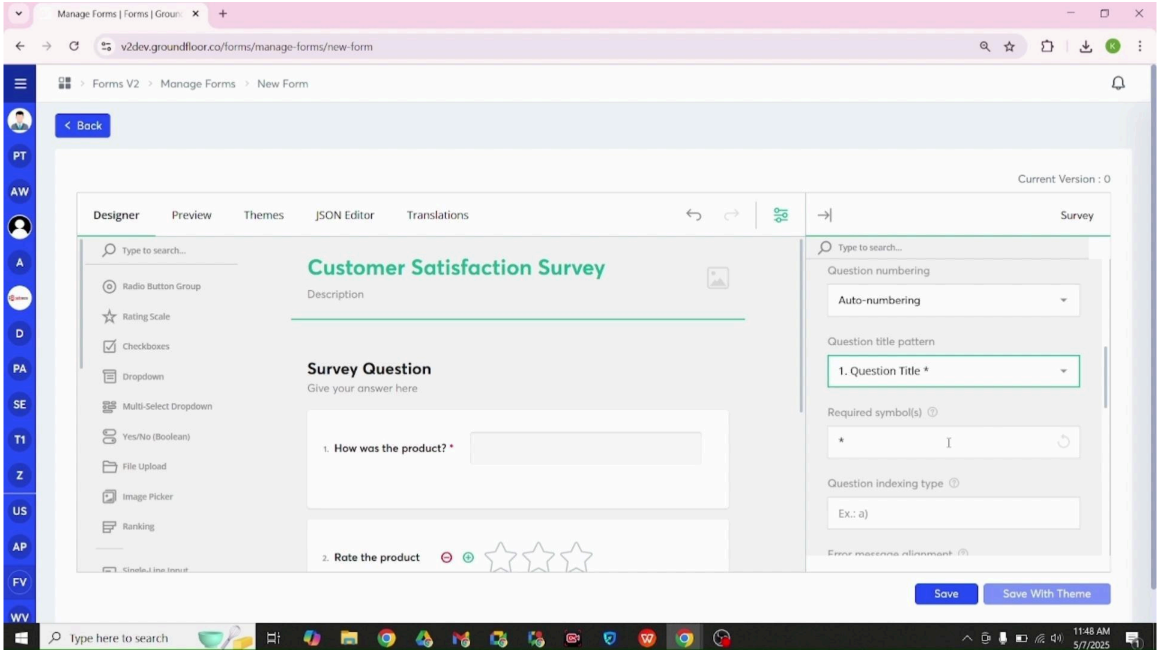
Step 6: Configure Question Title Pattern

44. From the "Question title pattern" dropdown, select the desired format for displaying question numbers and titles (e.g., "1. Question Title", "1. * Question Title", "Question Title *").



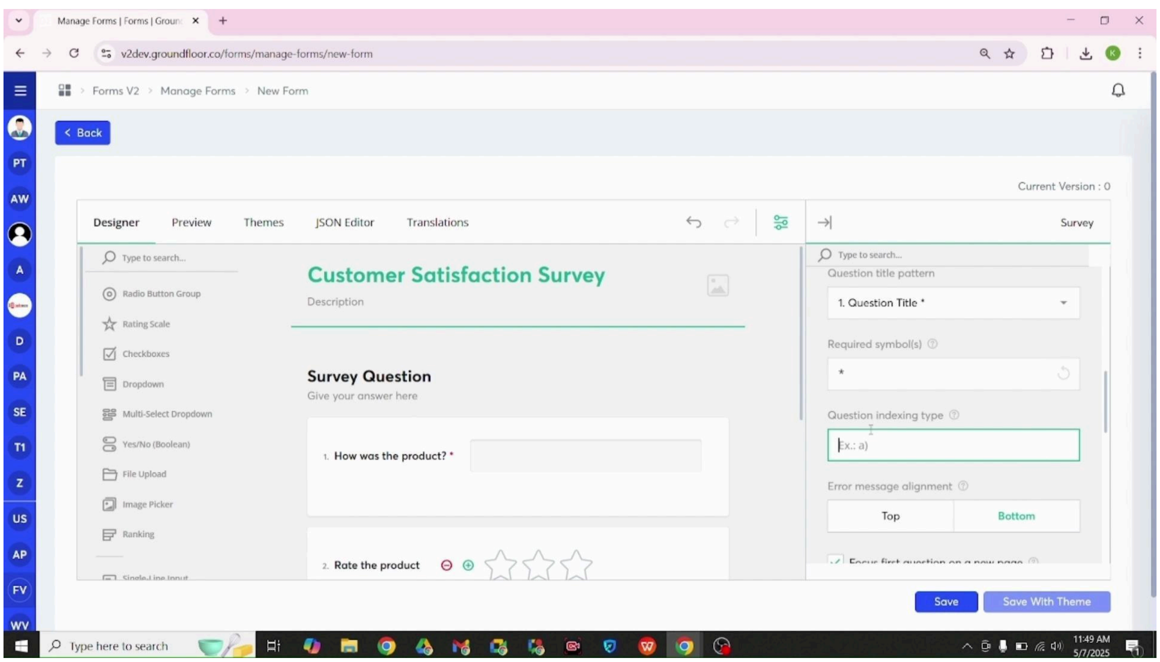
Step 7: Configure Required Symbols

45. In the "Required symbol(s)" field, enter the character(s) to indicate a required question (default is "*").



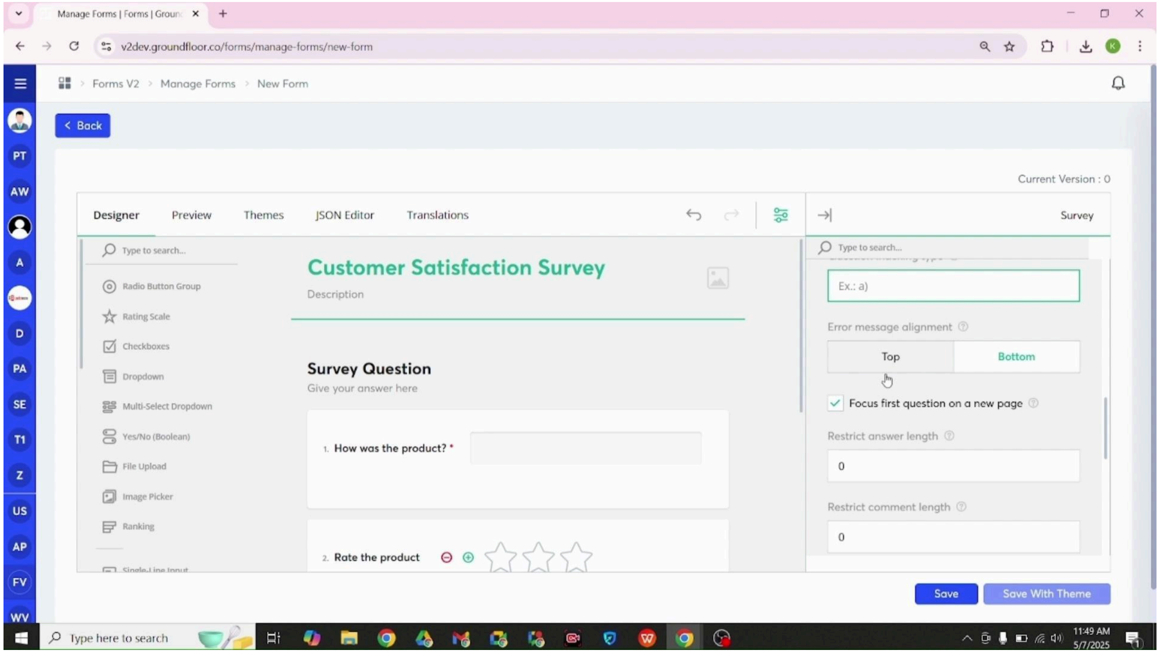
Step 8: Configure Question Indexing Type

46. In the "Question indexing type" field, define how sub-questions or indexed questions are labeled (e.g., "a)", "1.").

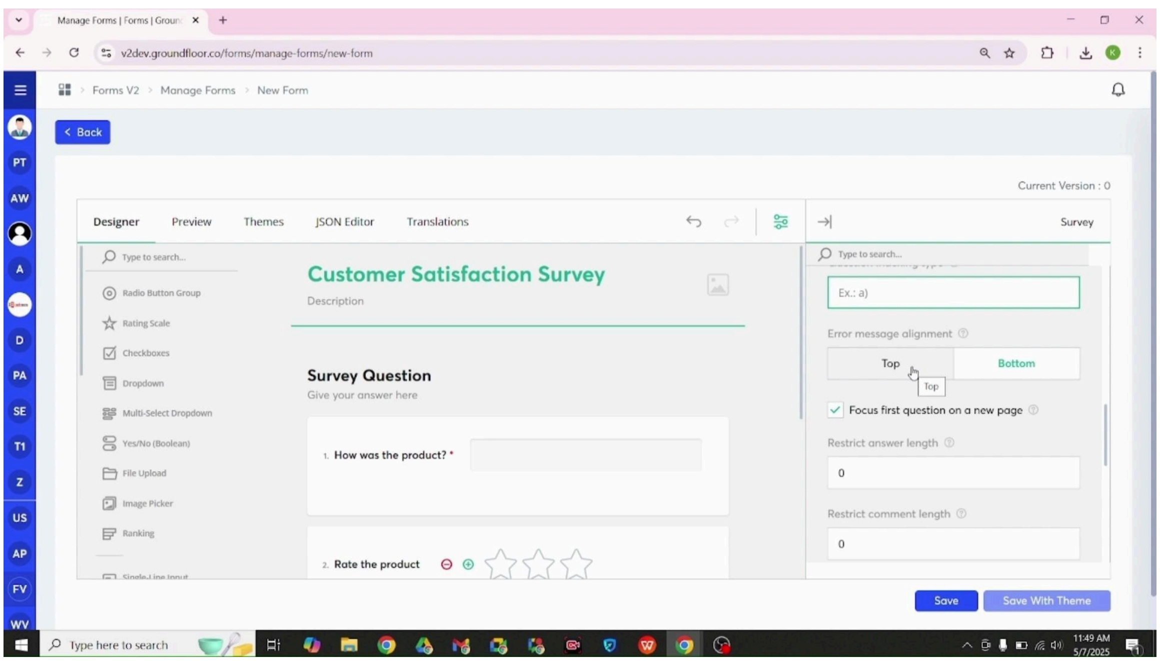


Step 9: Configure Error Message Alignment

47. Under "Error message alignment", select "Top" to display validation error messages above the field.

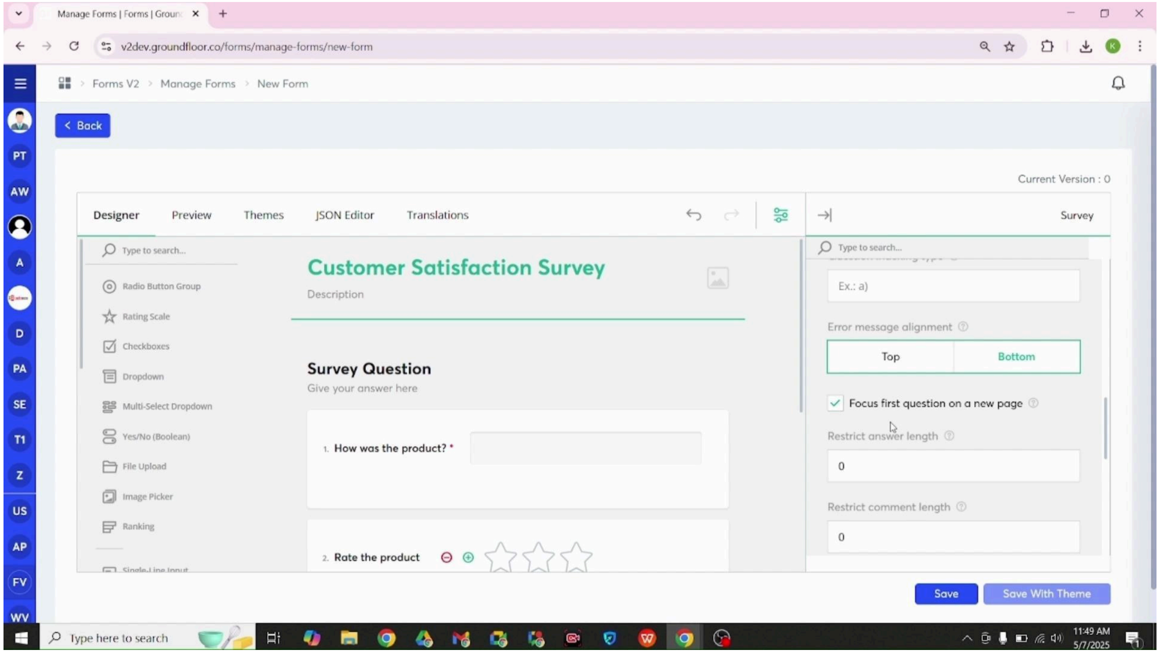


48. Select "Bottom" to display validation error messages below the field.



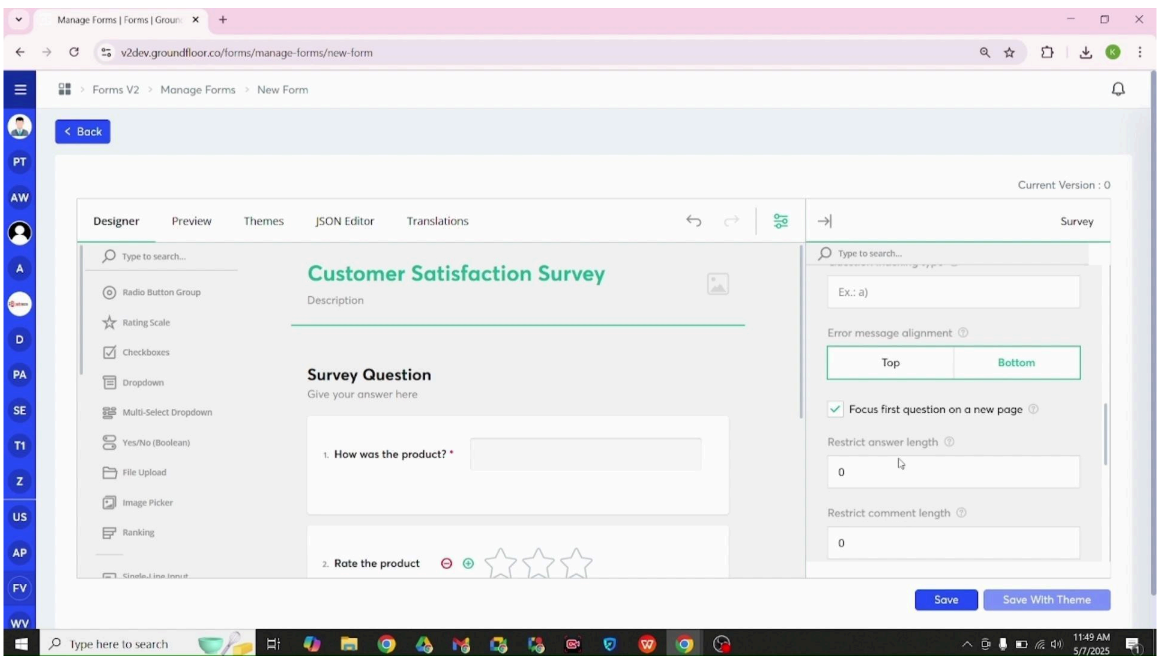
Step 10: Configure Focus First Question on a New Page

49. Check the "Focus first question on a new page" box to automatically focus on the first question when a new page loads.

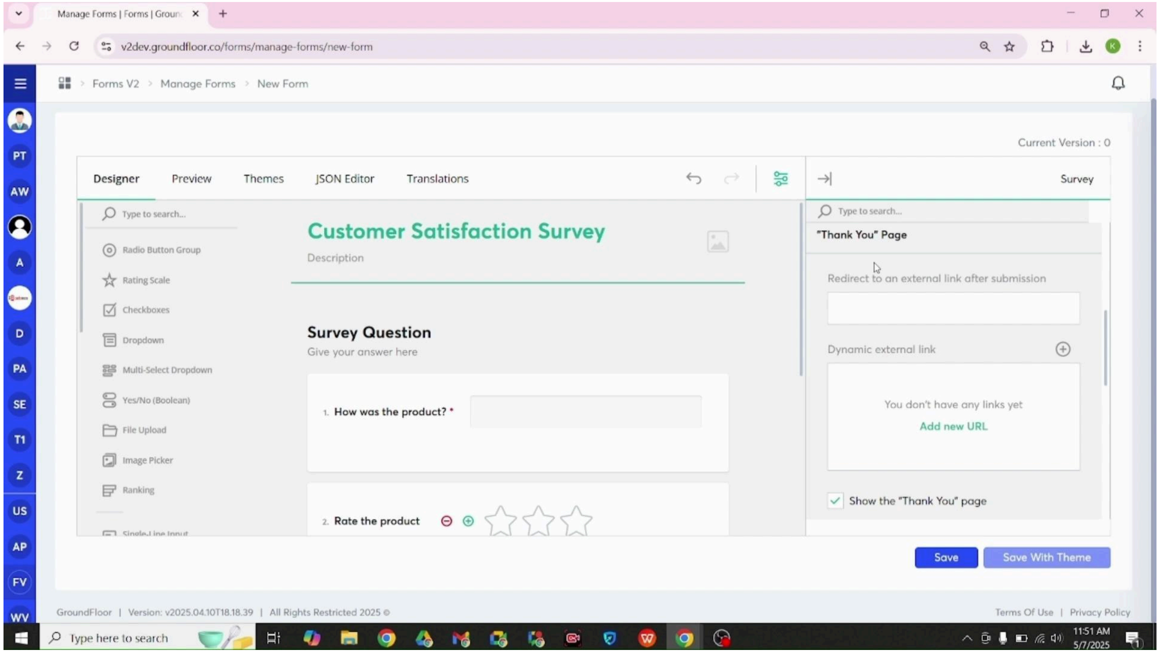


Step 11: Configure "Thank You" Page

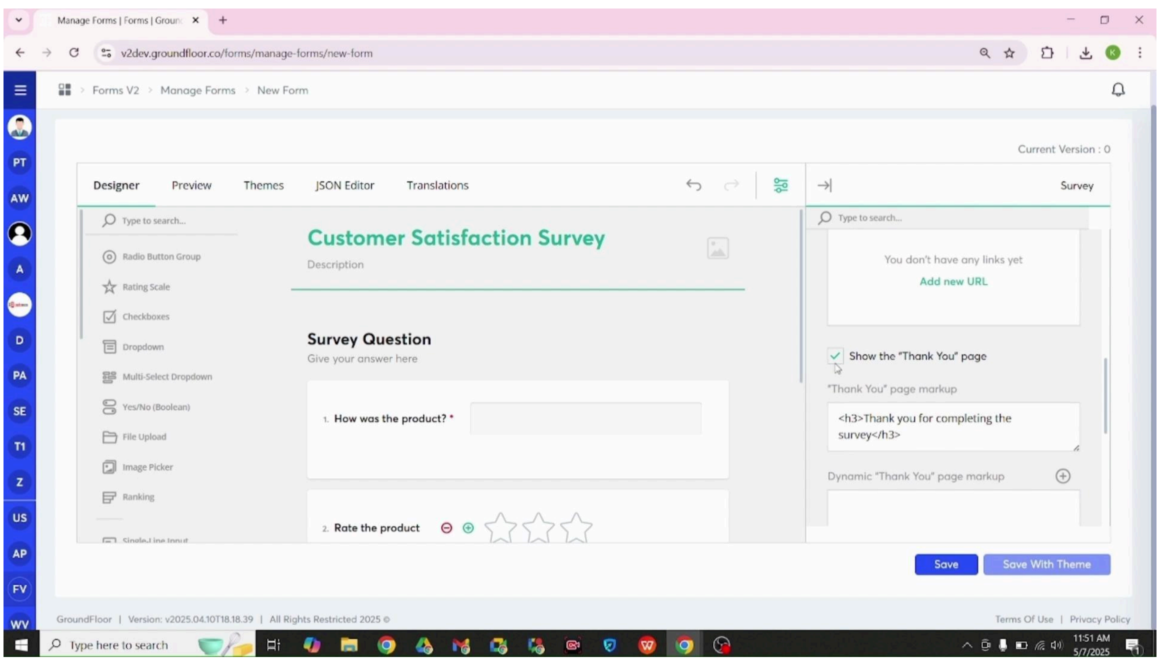
50. Navigate to the "Thank You" Page settings (usually found under general survey settings).



51. Check "Show the 'Thank You' page" to display it after form submission.

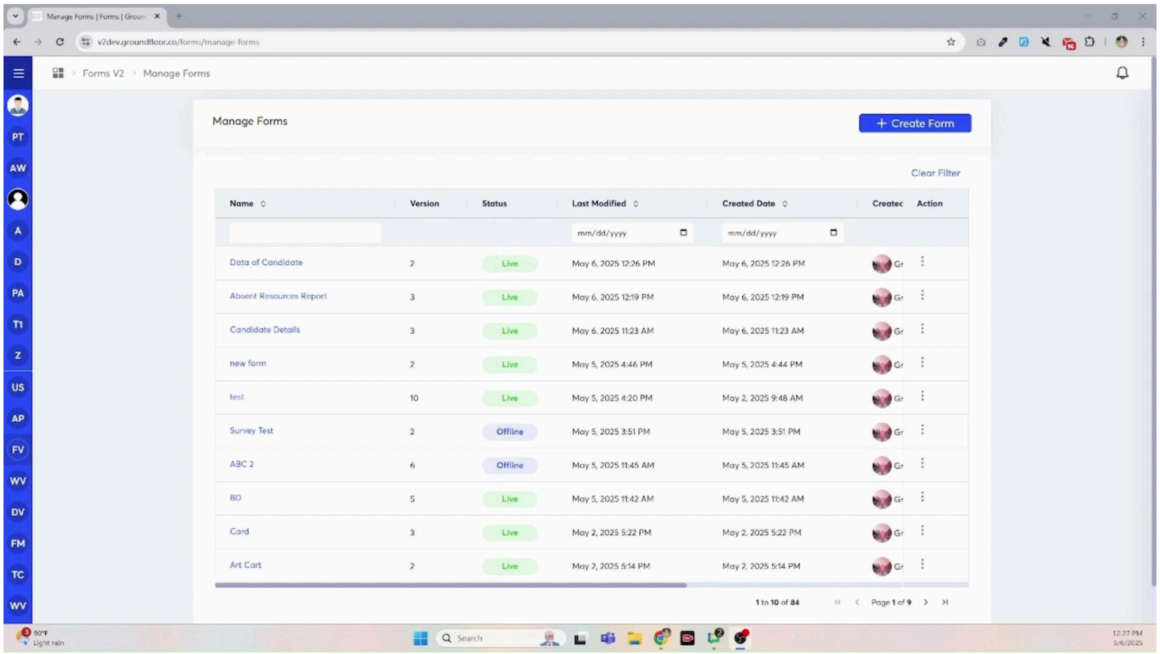


52. Uncheck it if you do not want to show a thank you page.

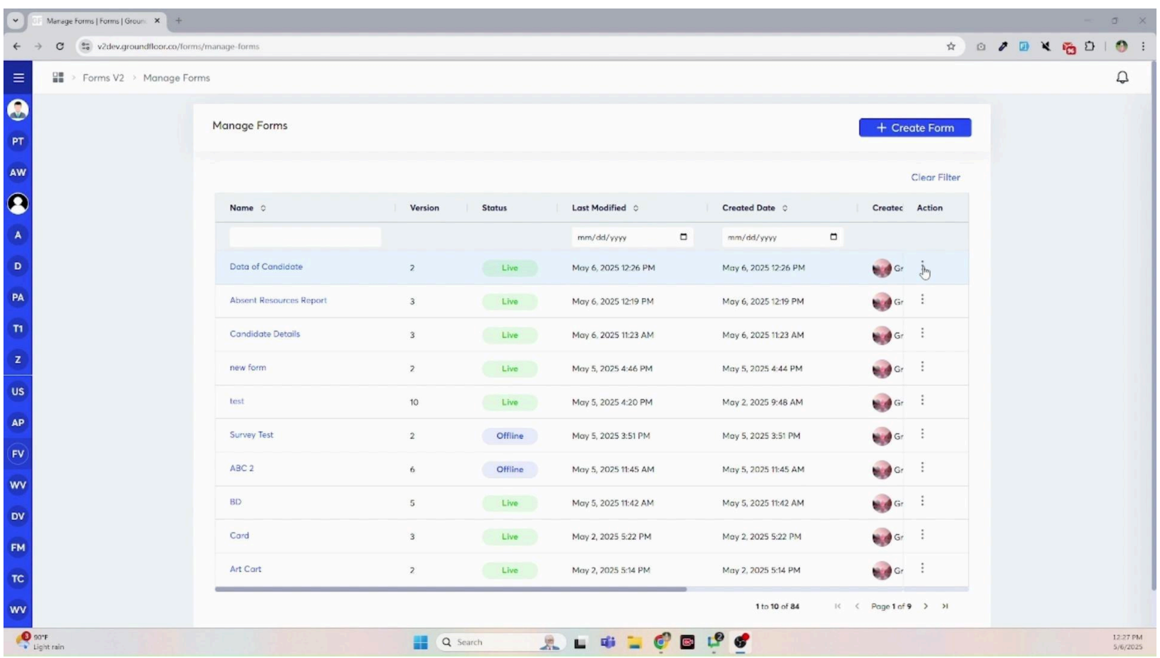


Task 1: Perform Actions on Existing Forms

53. Navigate to the "Manage Forms" page.

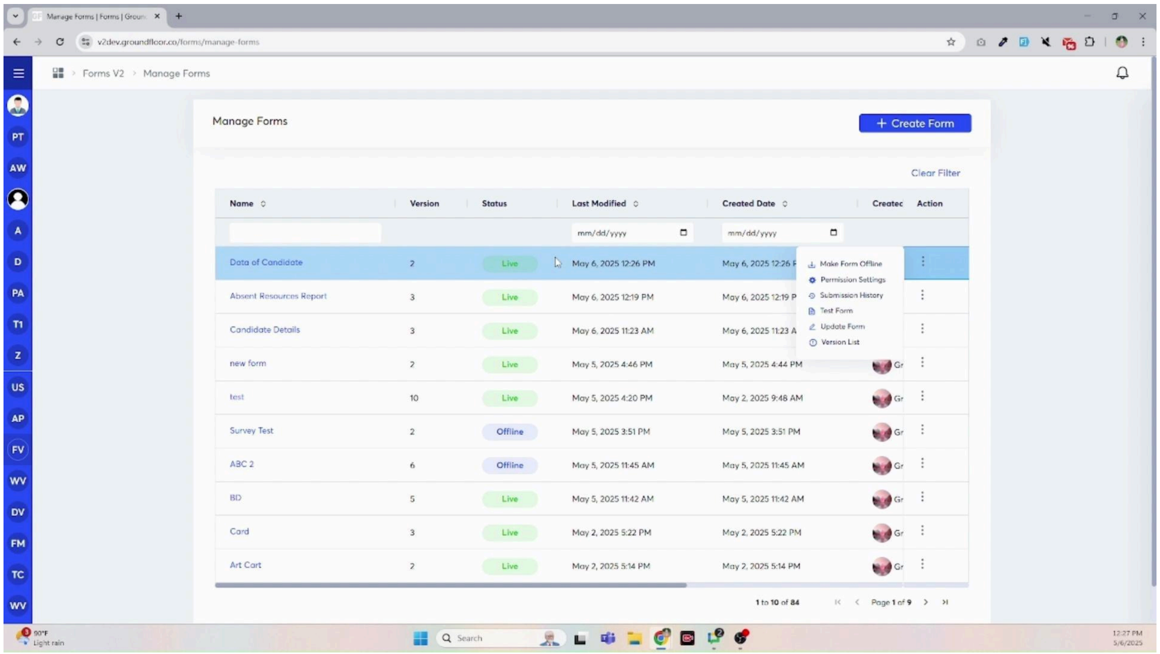


54. For a "Live" form, click the three-dot (Action) menu.

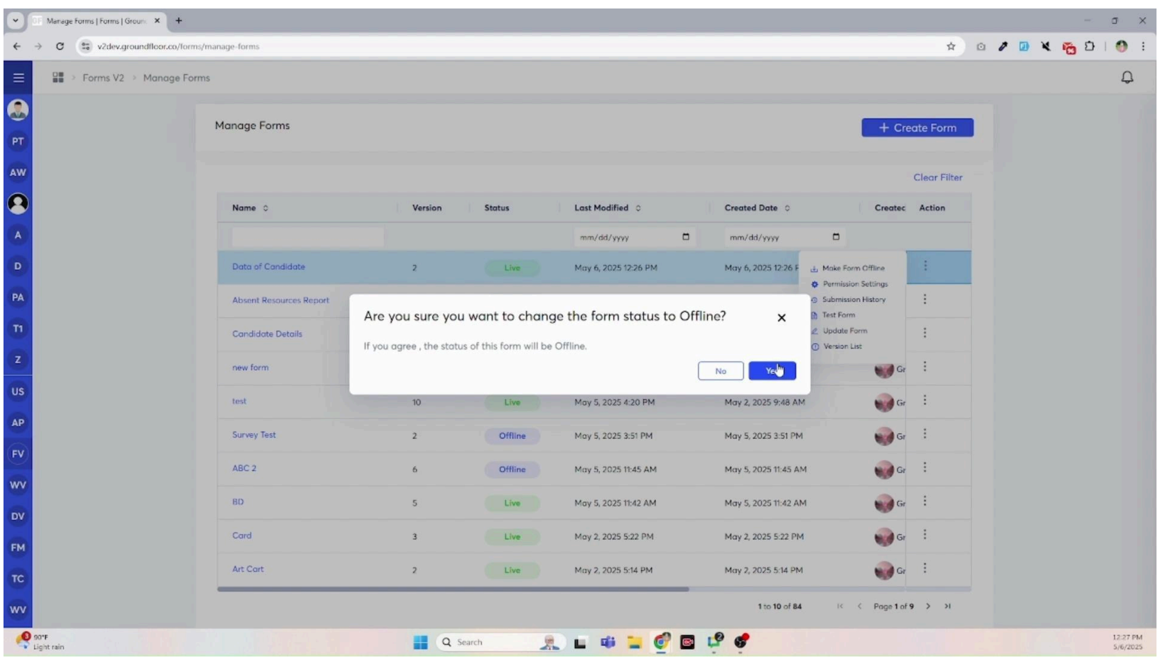


Task 2: Make a Form Offline

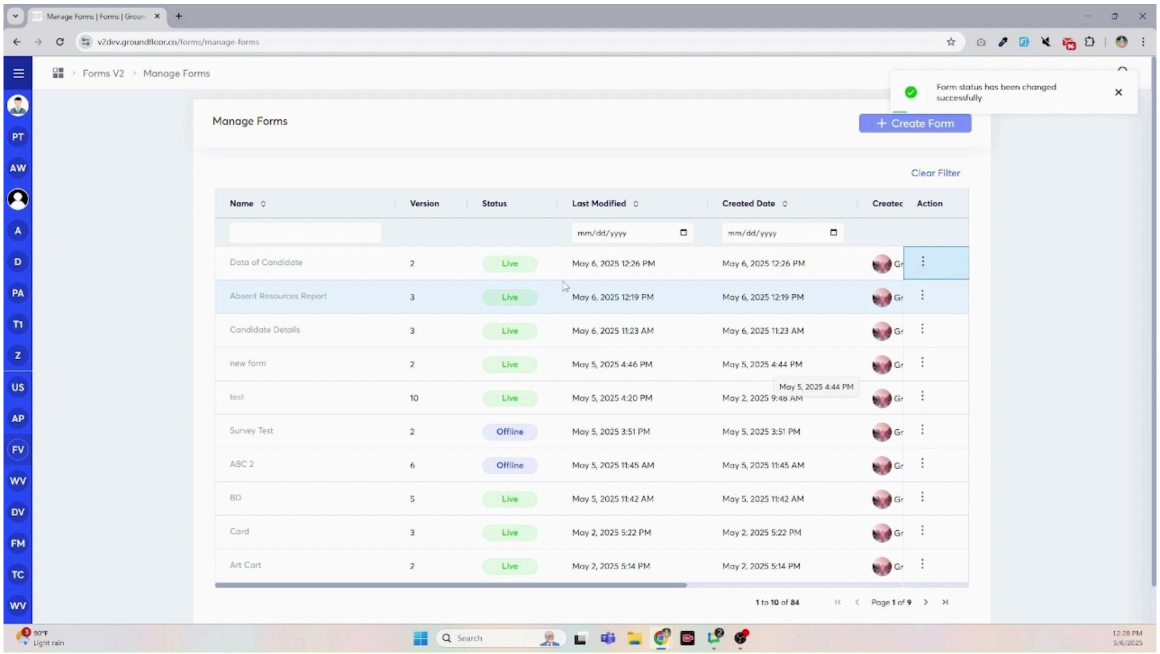
55. From the Action menu of a "Live" form, select "Make Form Offline".



56. A confirmation pop-up "Are you sure you want to change the form status to Offline?" will appear. Click "Yes".

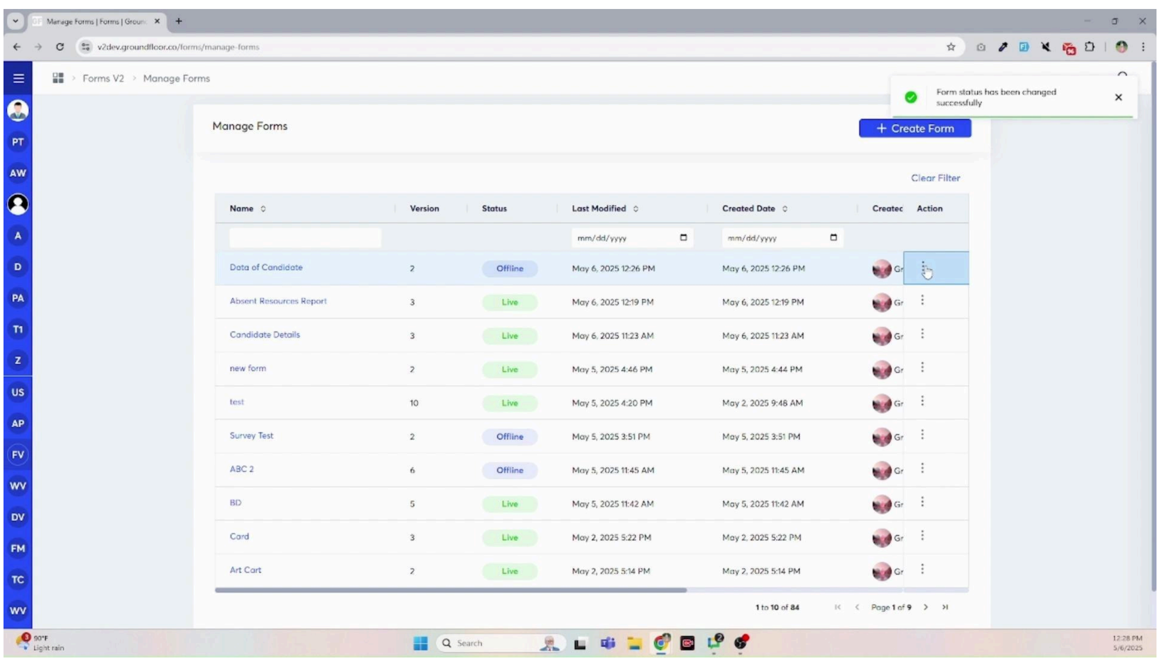


57. The form status will change to "Offline".

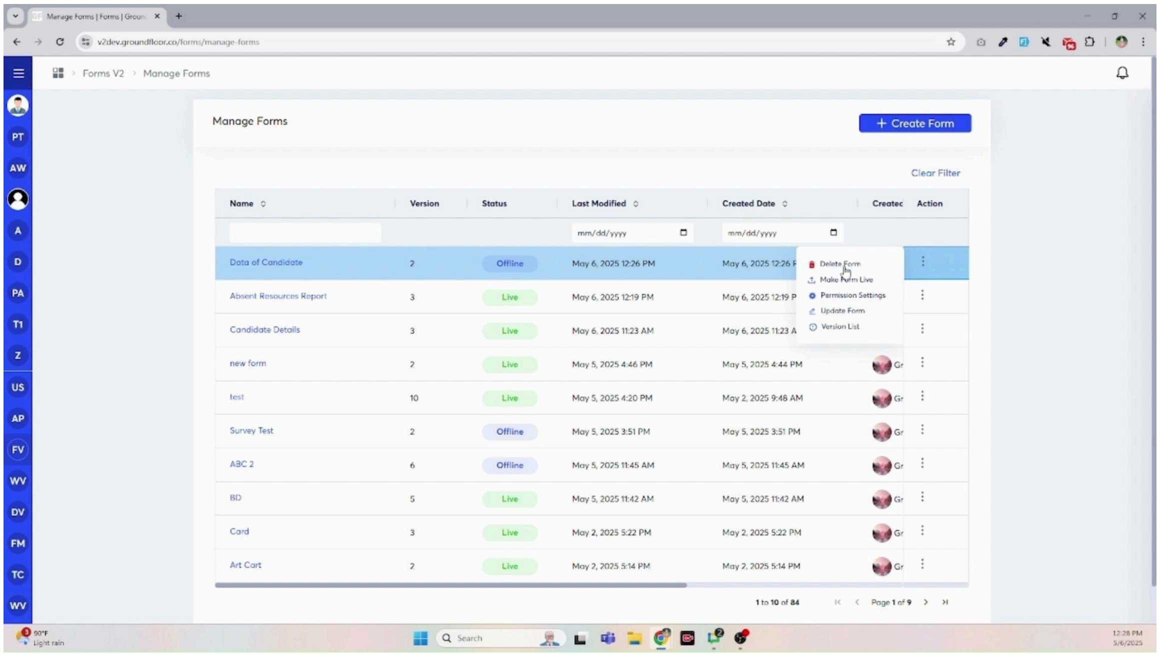


Task 3: Delete a Form

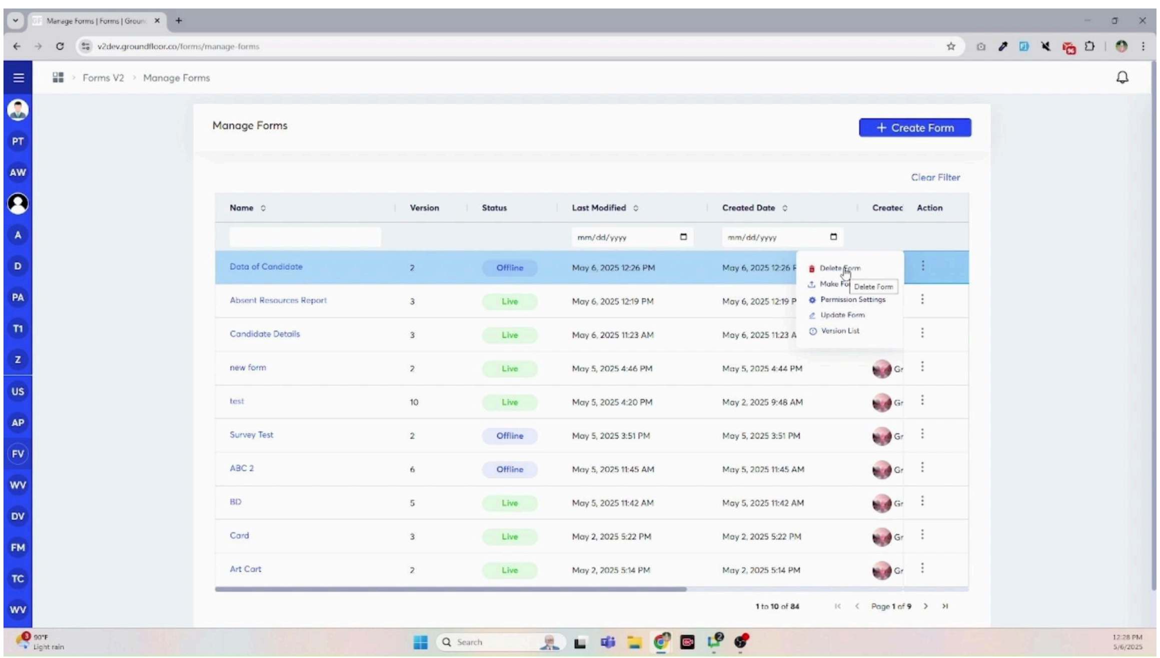
58. For an "Offline" form, click the three-dot (Action) menu.



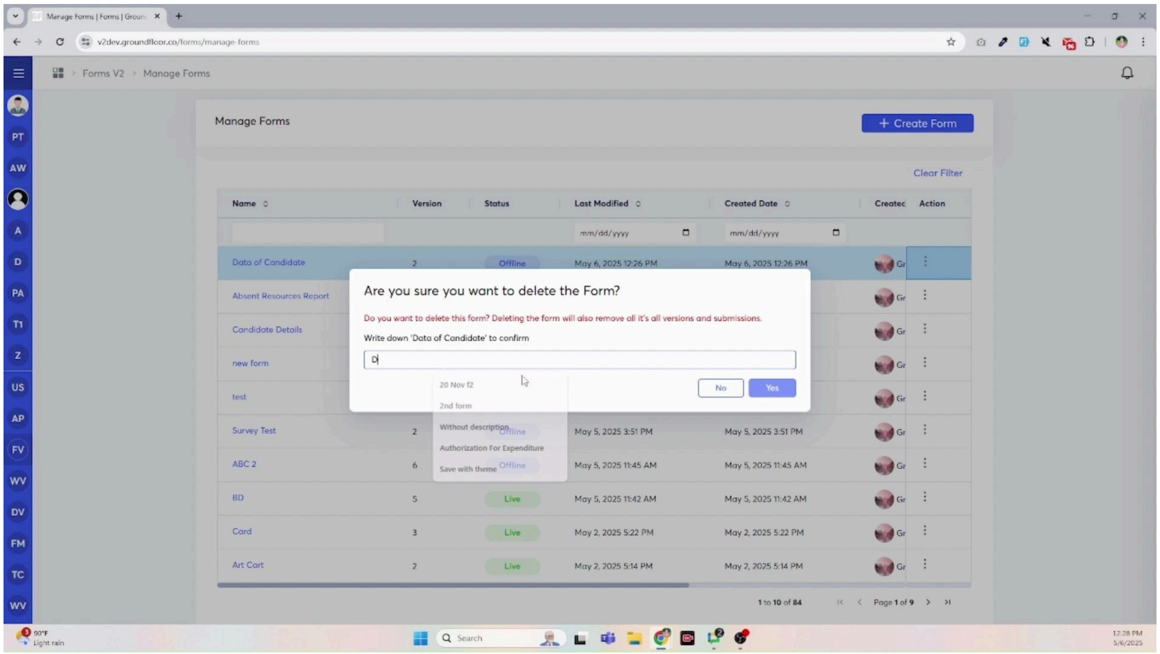
59. Select "Delete Form".



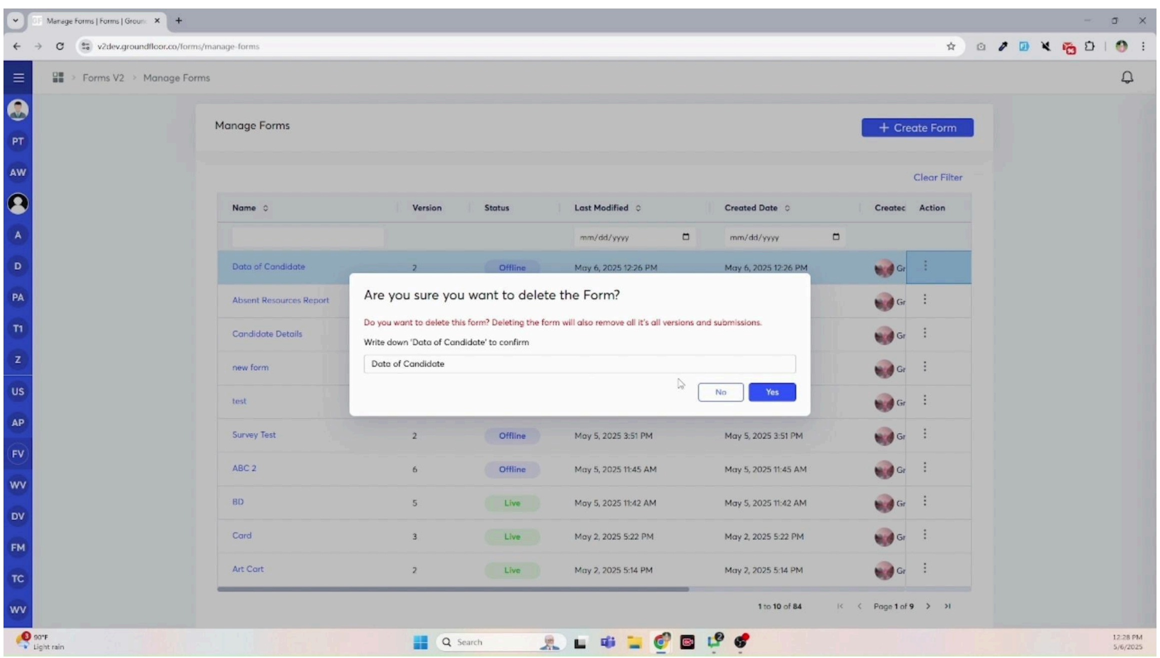
60. A confirmation pop-up "Are you sure you want to delete the Form?" will appear.



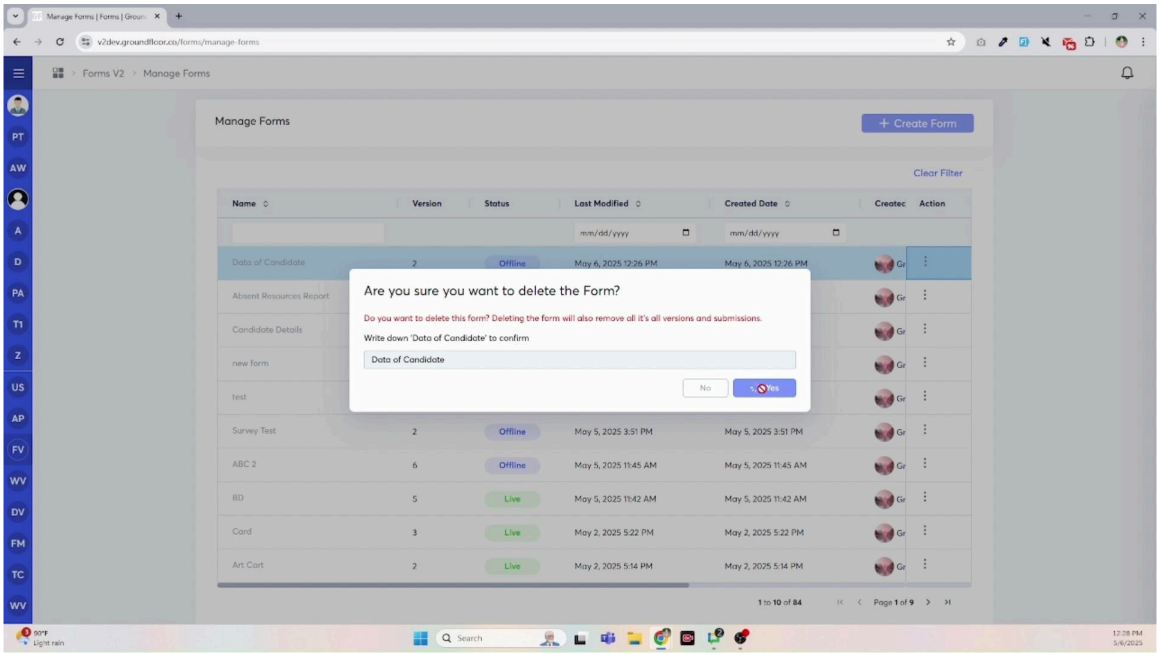
61. Type the exact name of the form (e.g., "Data of Candidate") into the confirmation field.



62. Click "Yes".

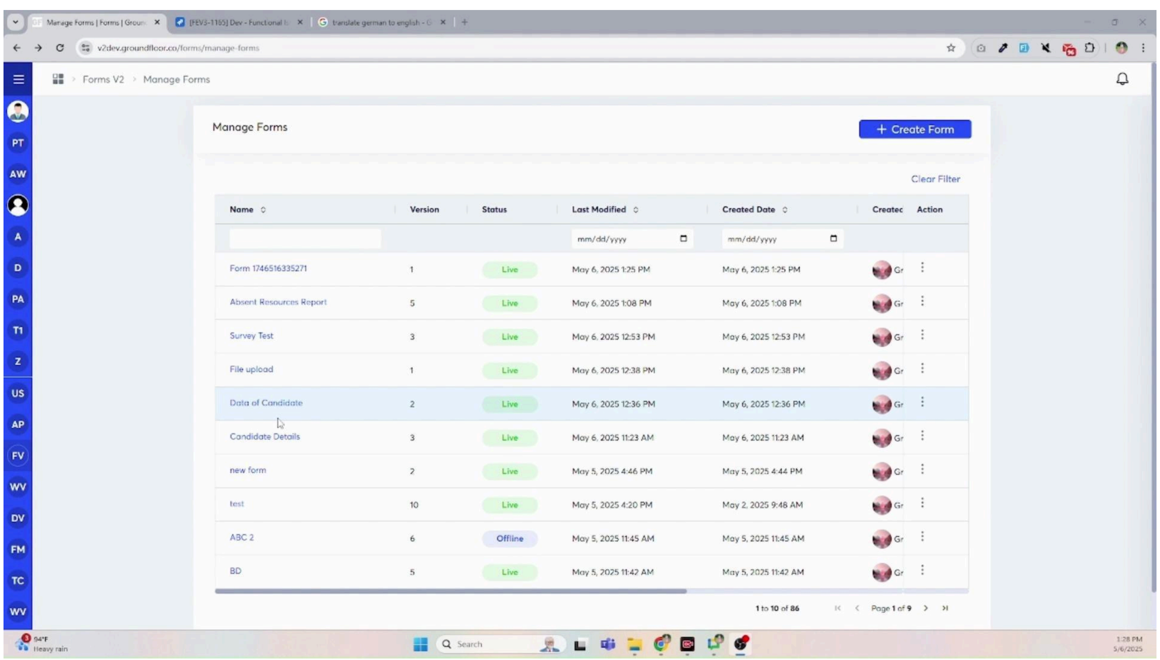


63. The form will be deleted from the list.

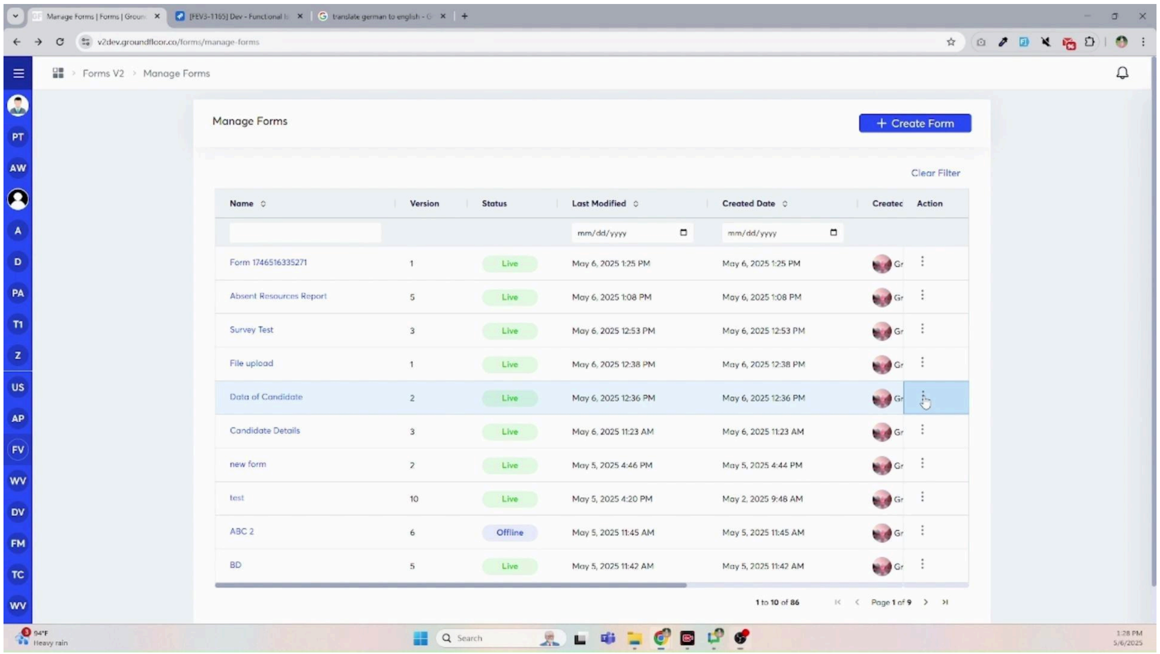


Step 1: Access Permission Settings

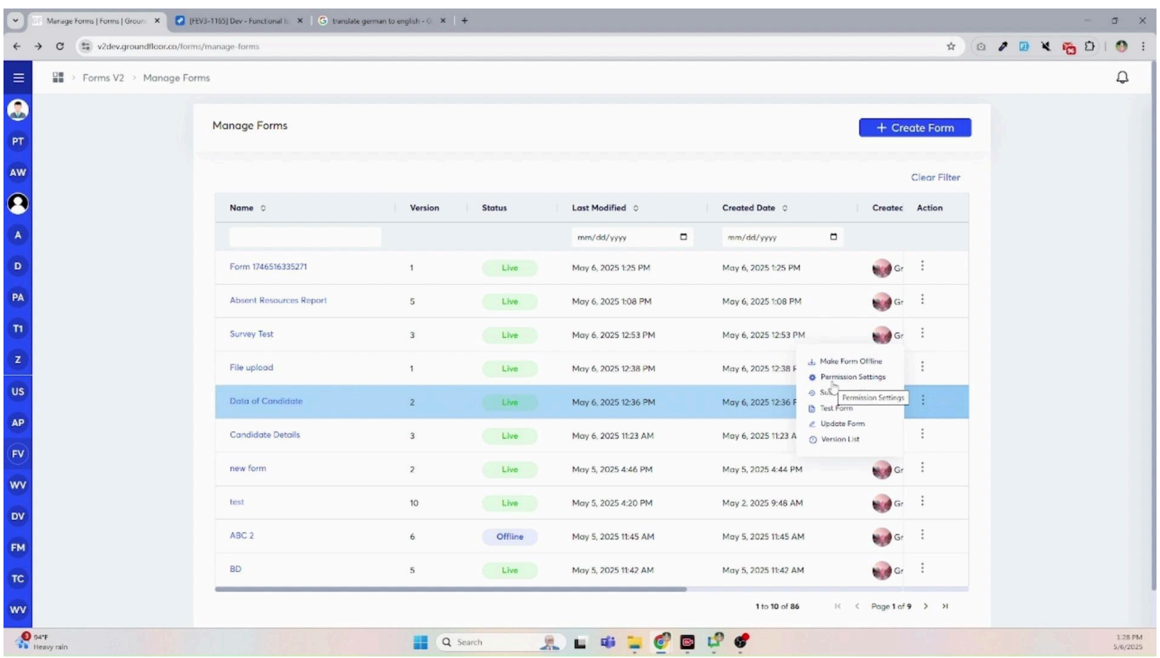
64. On the "Manage Forms" page, locate a "Live" form (e.g., "Date of Candidate").



65. Click the three-dot (Action) menu for that form.

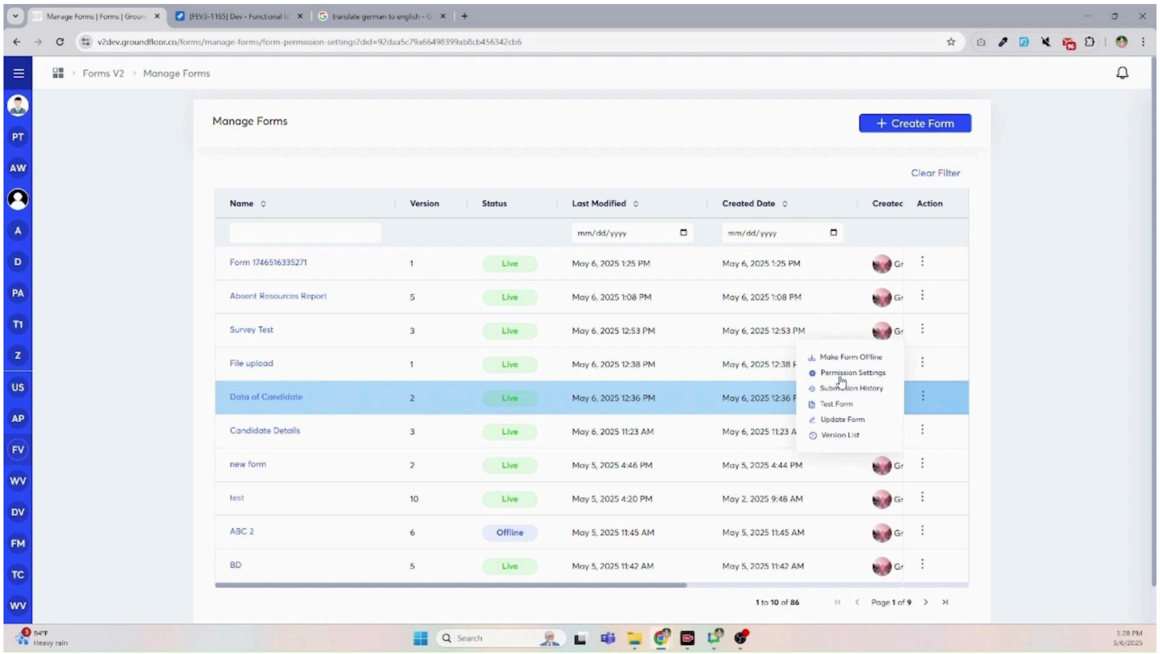


66. Select "Permission Settings".

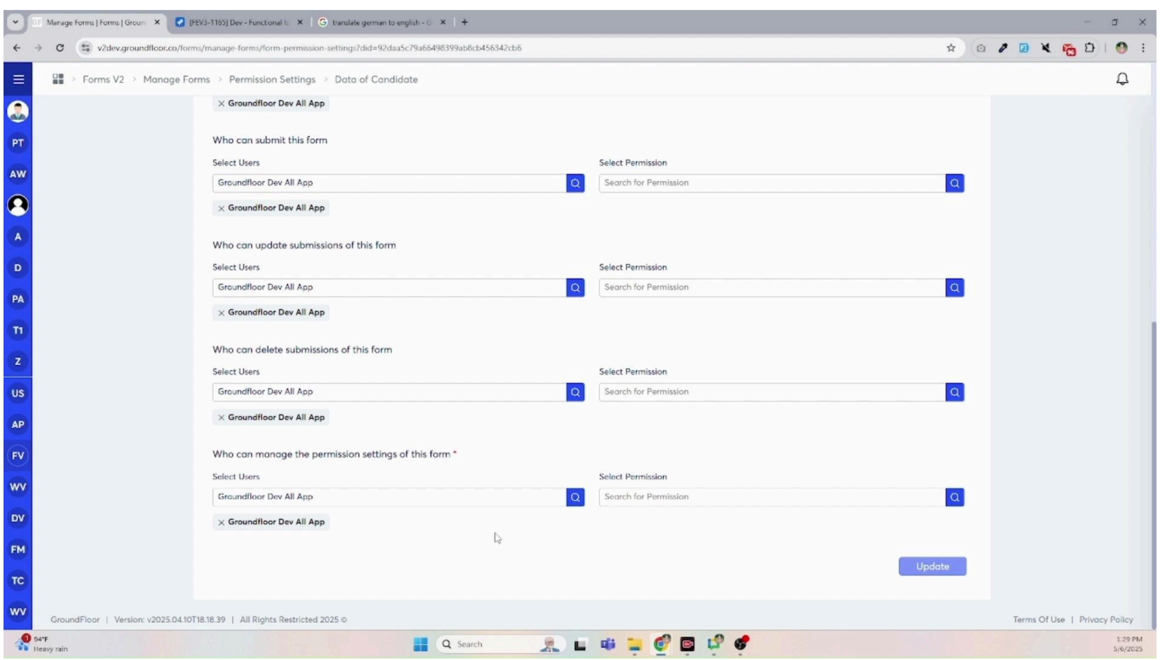


Step 2: Configure Form Permissions

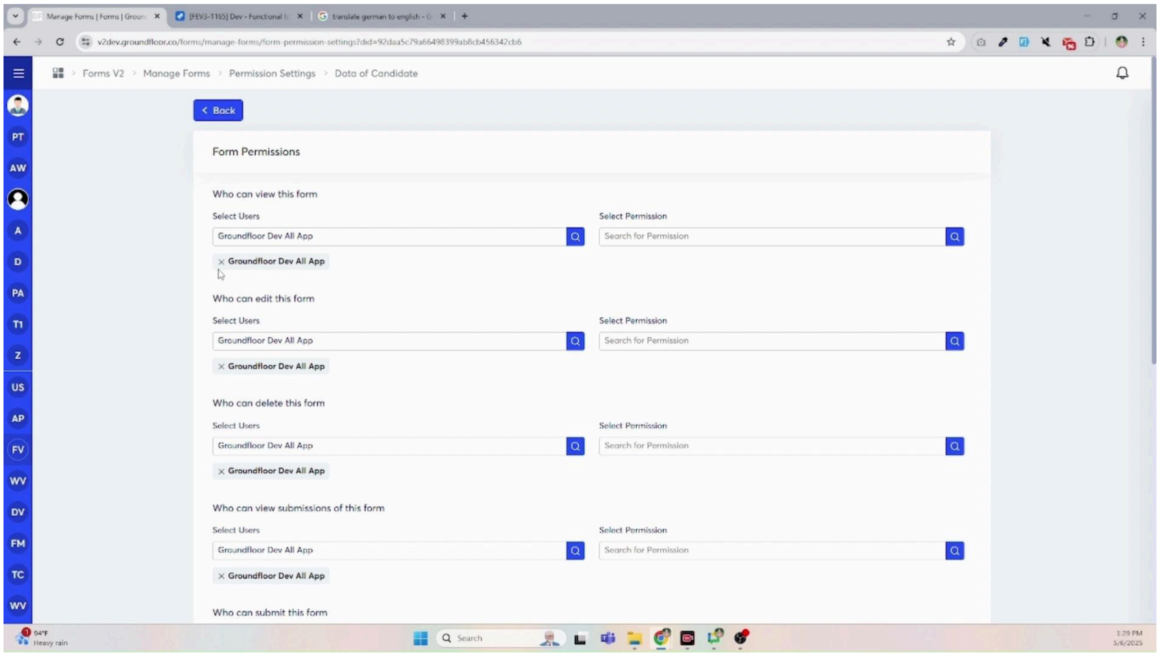
67. The "Form Permissions" page will load.



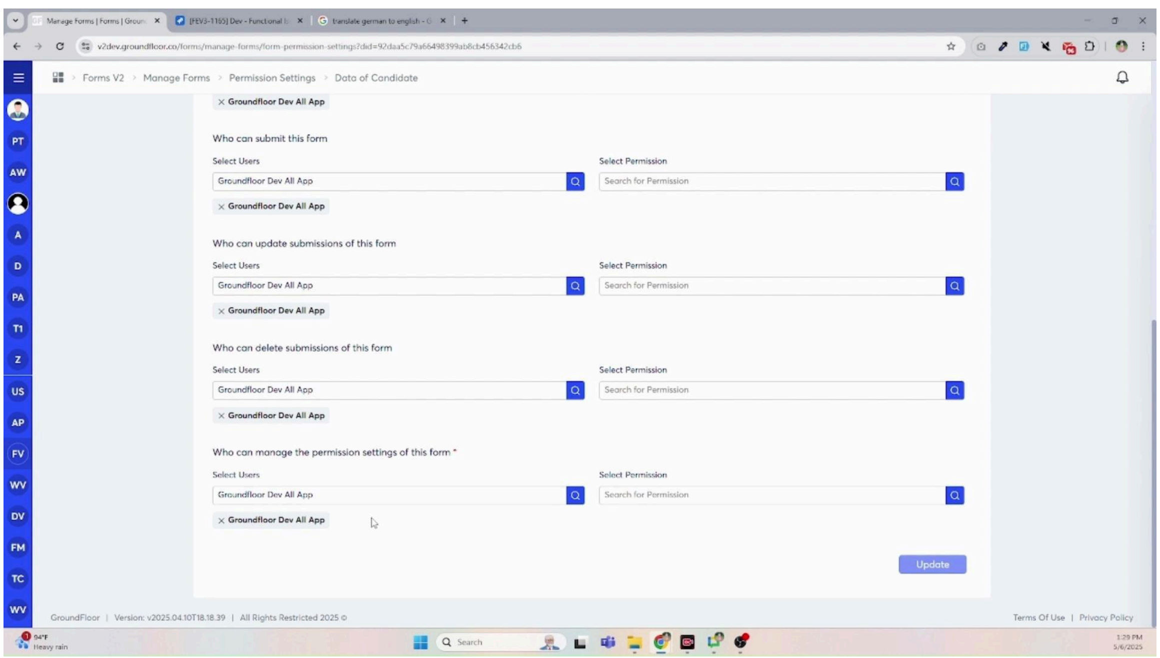
68. For each permission type (e.g., "Who can view this form", "Who can edit this form", etc.), you can:
69. Configure permissions for:
70. Initially, the user who created the form (or users with "Groundfloor Dev All App" permission) has all permissions.



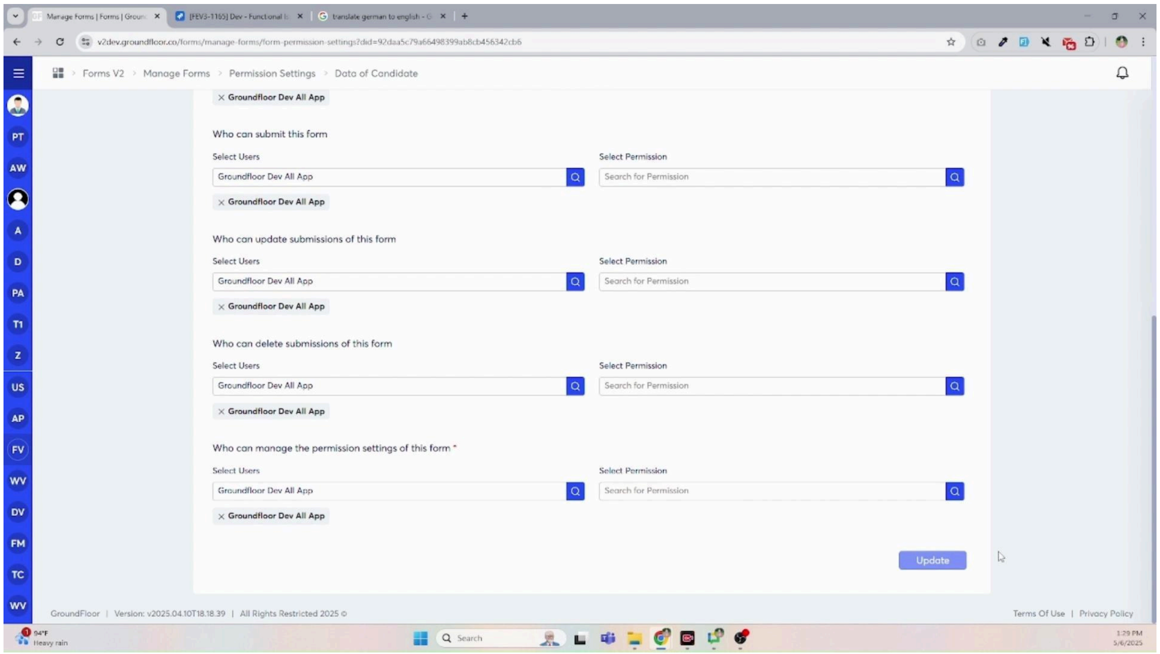
71. Permissions can be removed by clicking the 'x' next to a user or role.



72. At least one user/role must always have permission to "manage the permission settings of this form".

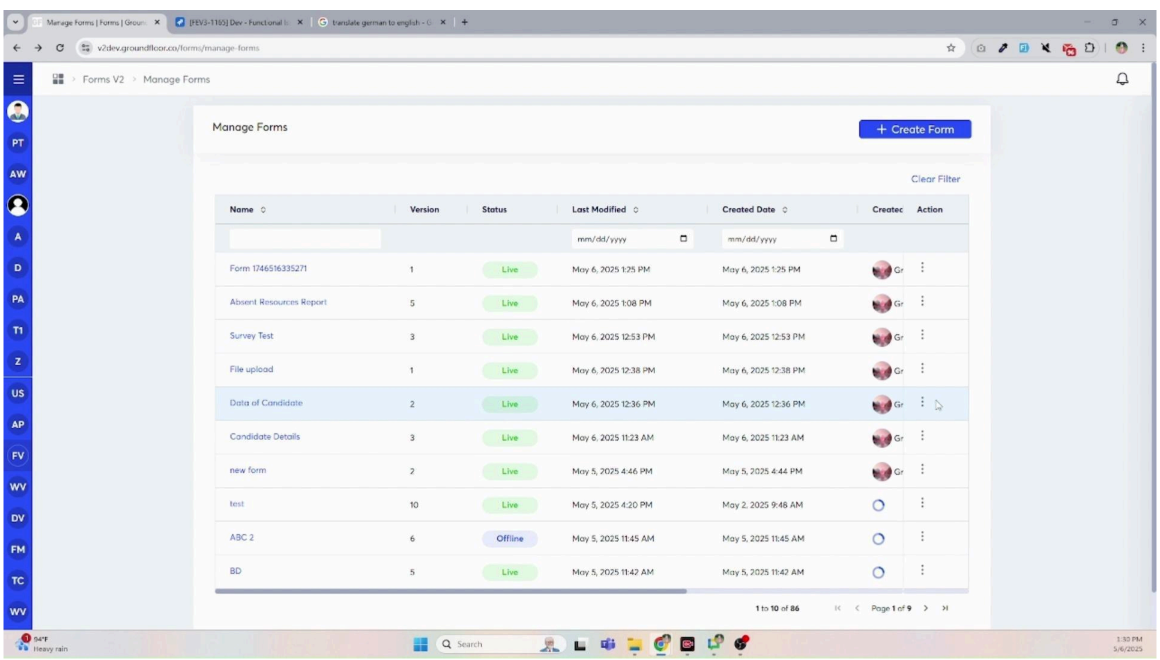


73. After making changes, click the "Update" button.

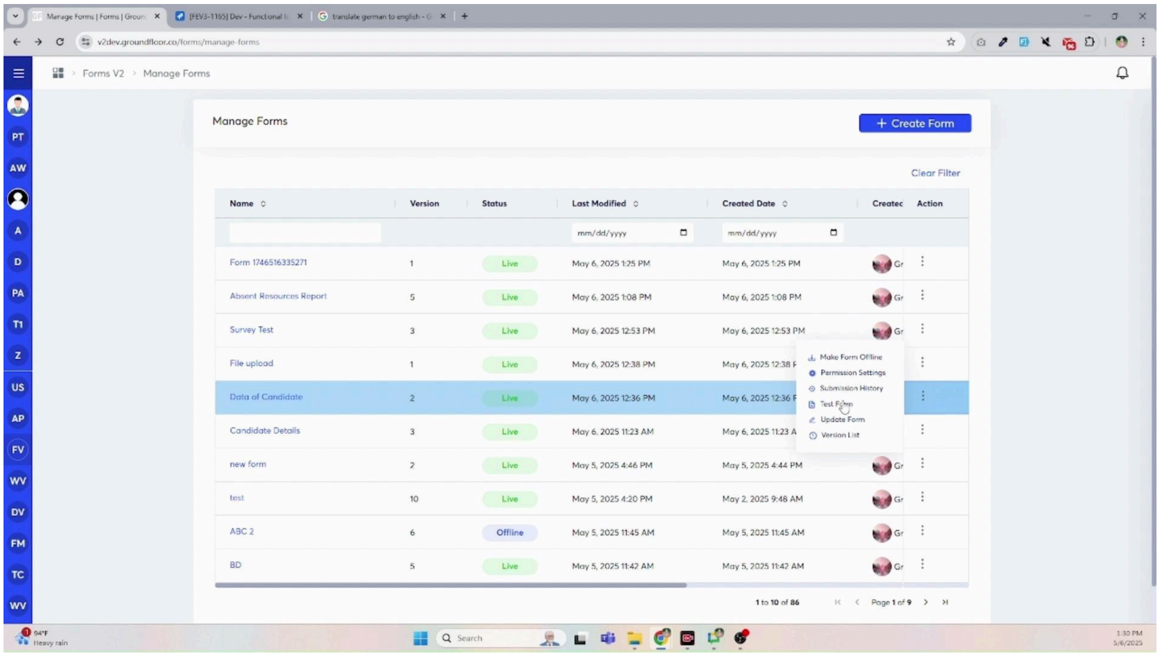


Step 1: Test a Form

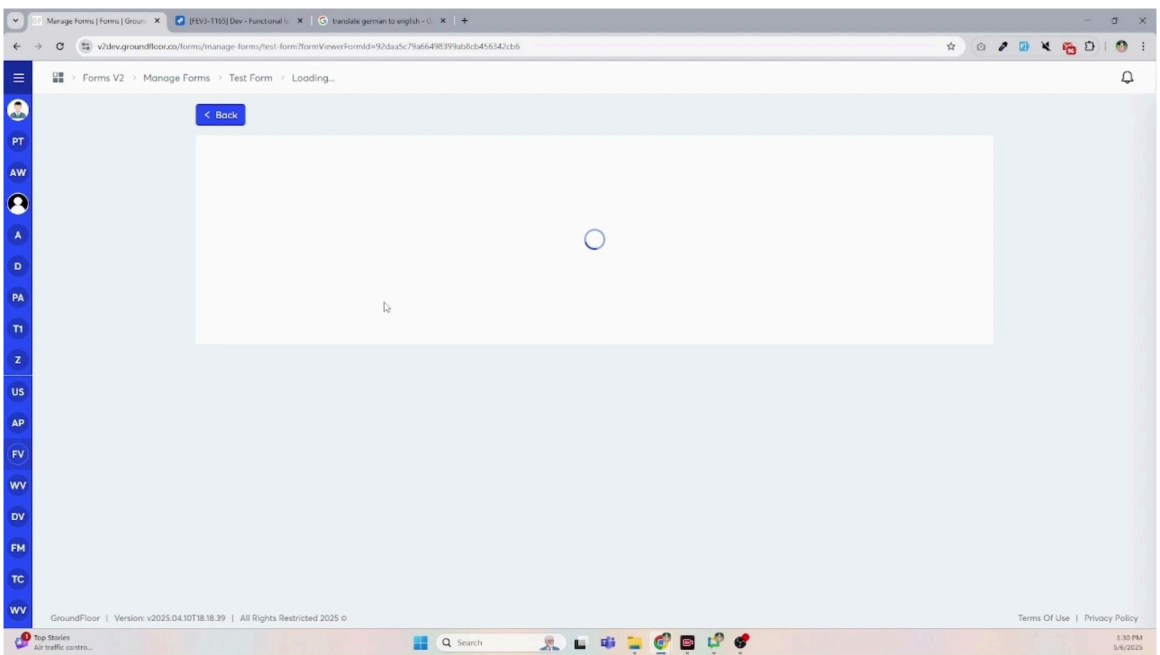
74. On the "Manage Forms" page, for the desired form (e.g., "Data of Candidate"), click the three-dot (Action) menu.



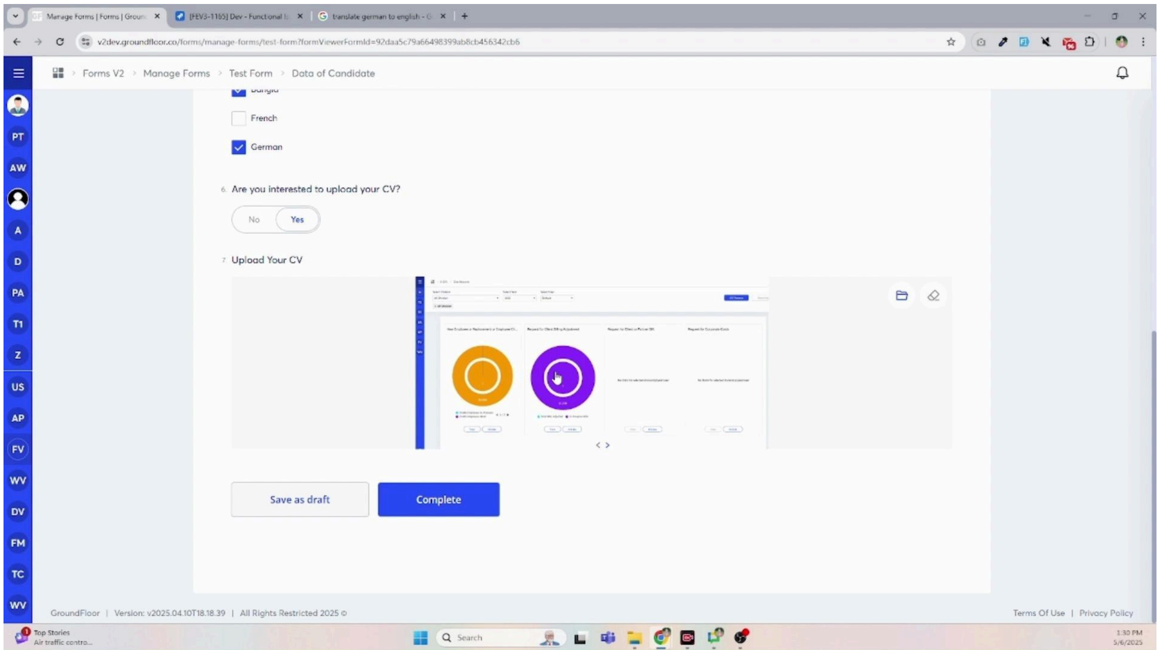
75. Select "Test Form".



76. The form will open in a test mode. Fill in the details.

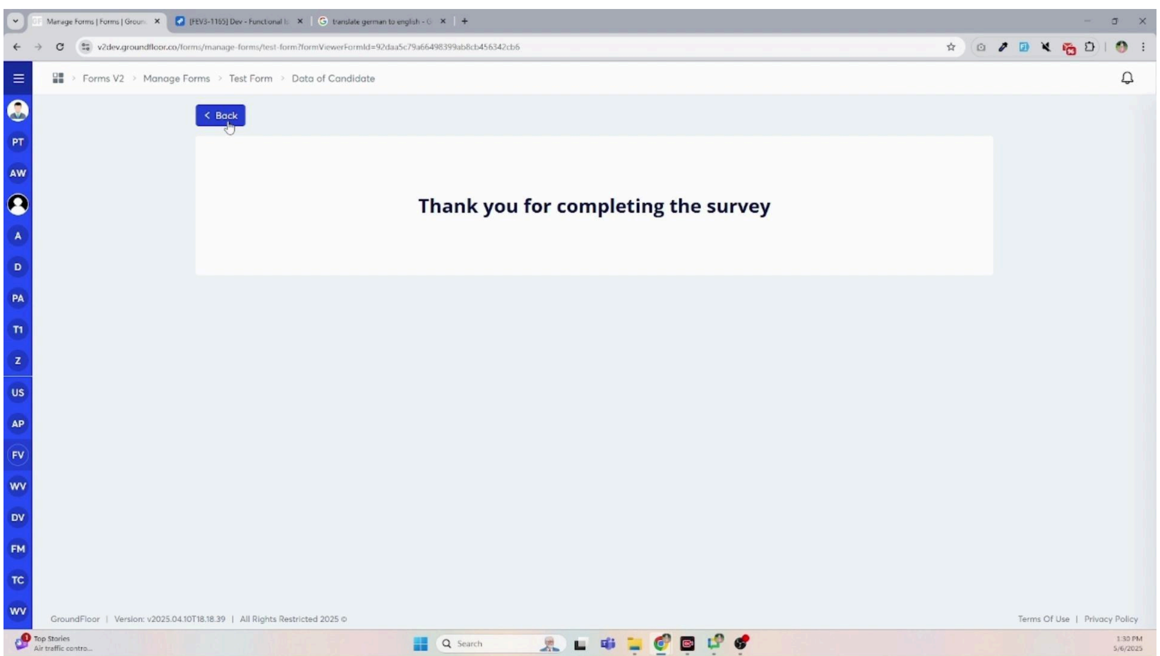


77. Click "Complete" to submit the test form.

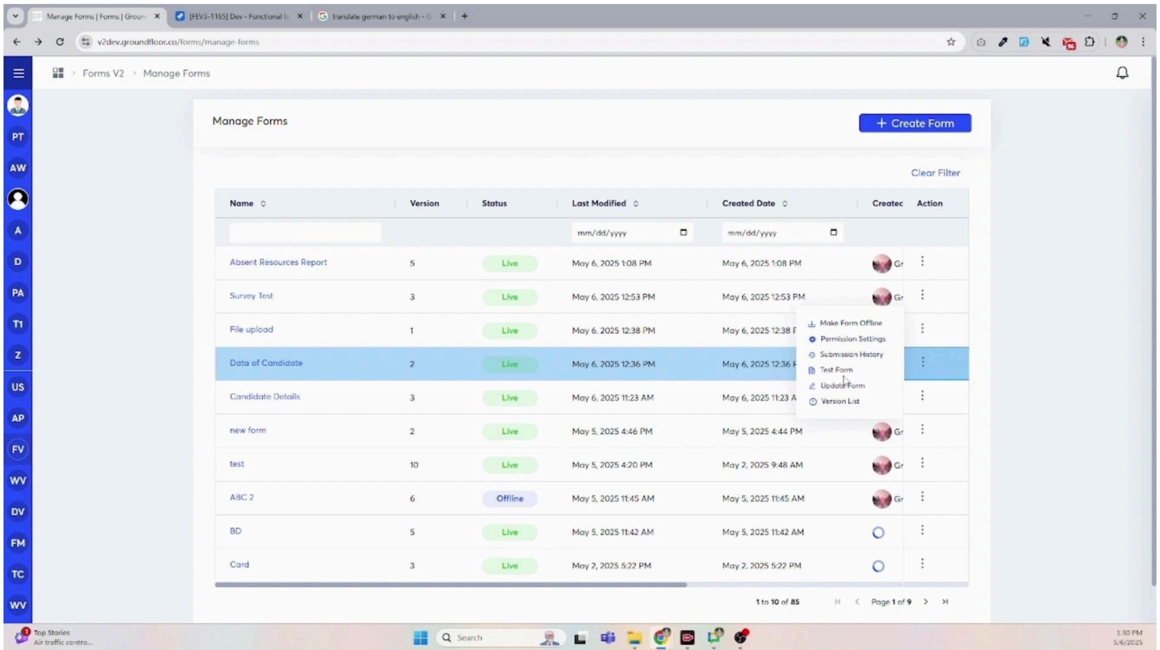


Step 2: View Submission History

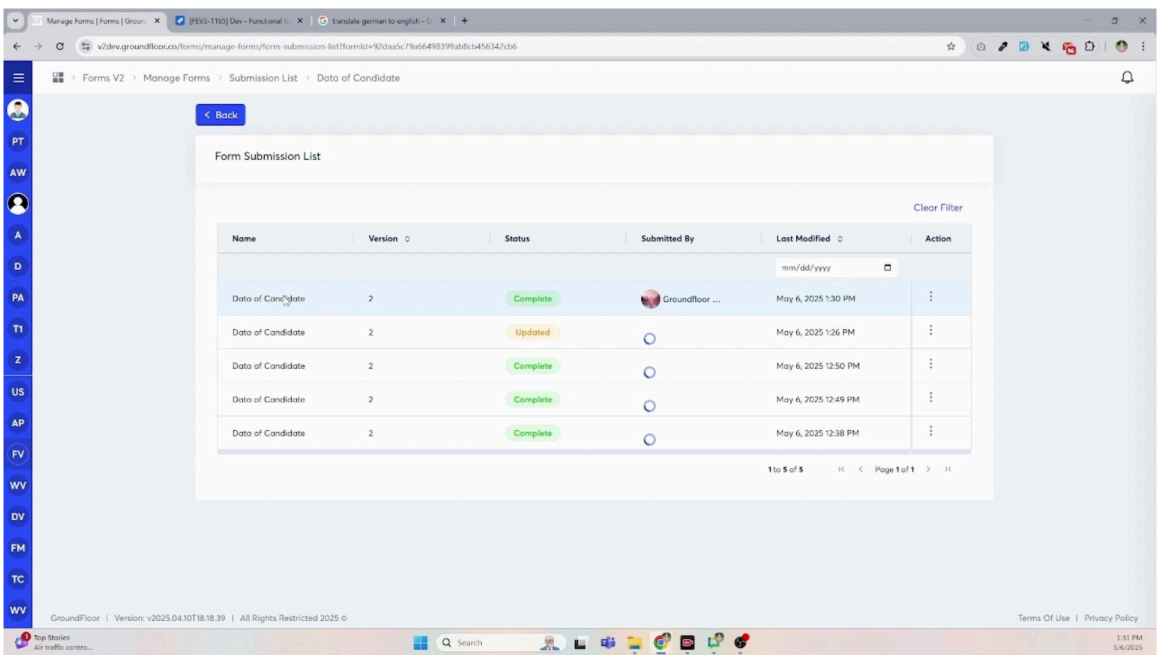
78. Go back to the "Manage Forms" page. Click the Action menu for the same form.



79. Select "Submission History".

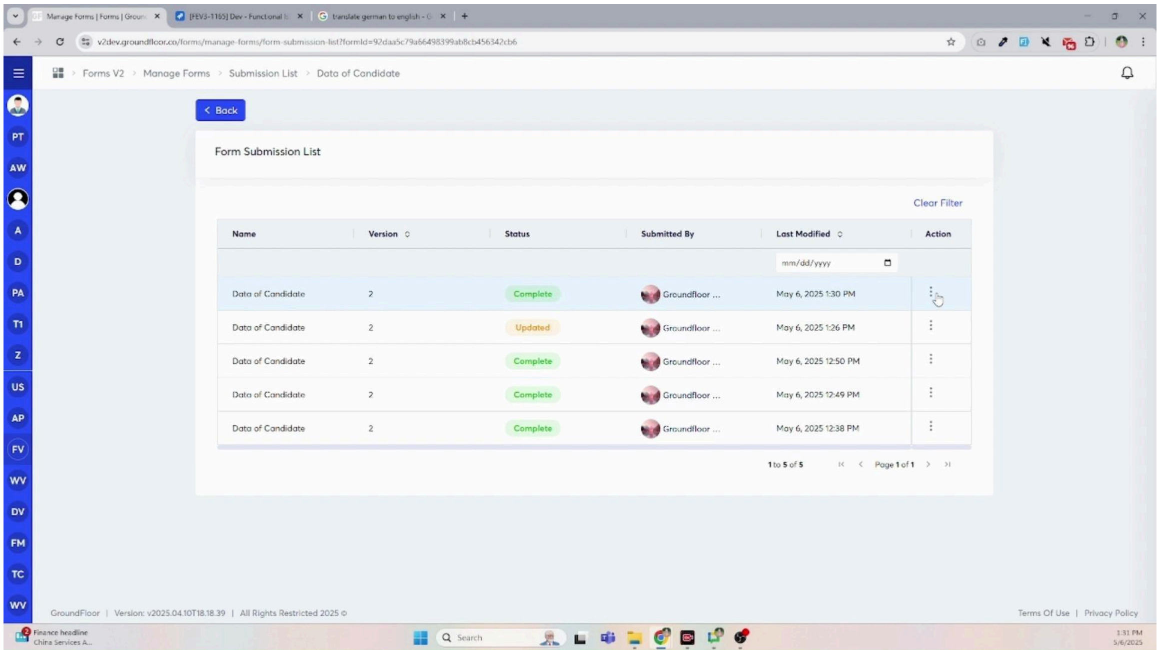


80. The "Form Submission List" will show all submissions for that form, including the one just made.



Step 3: Actions on Submissions

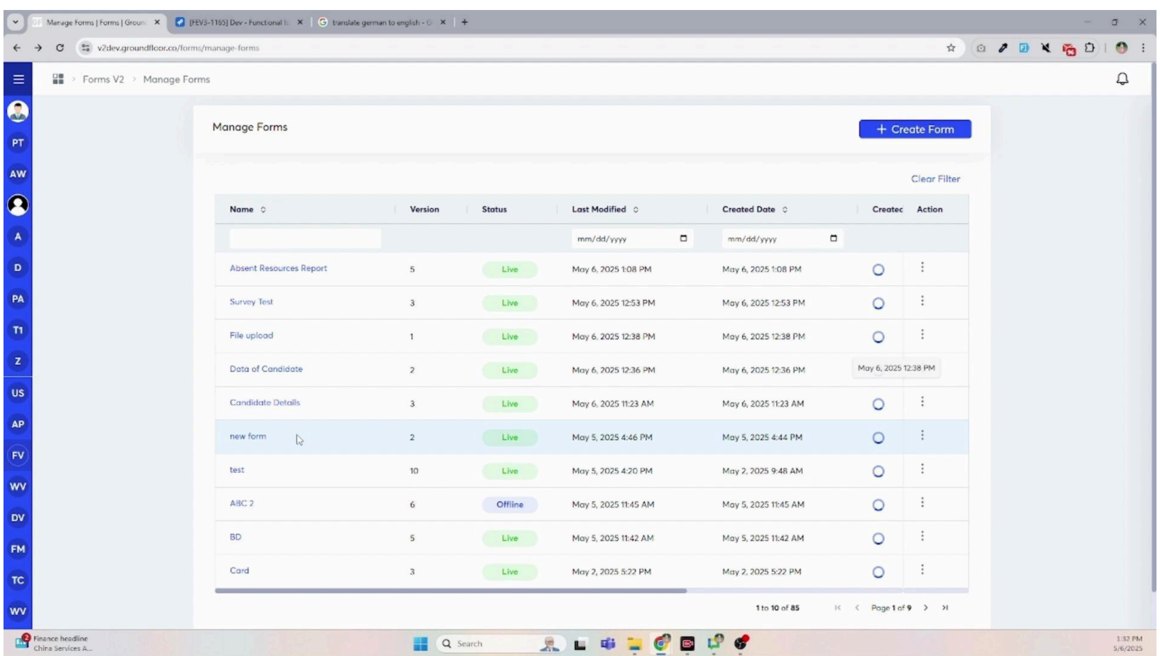
81. For any submission in the list, click the three-dot (Action) menu.



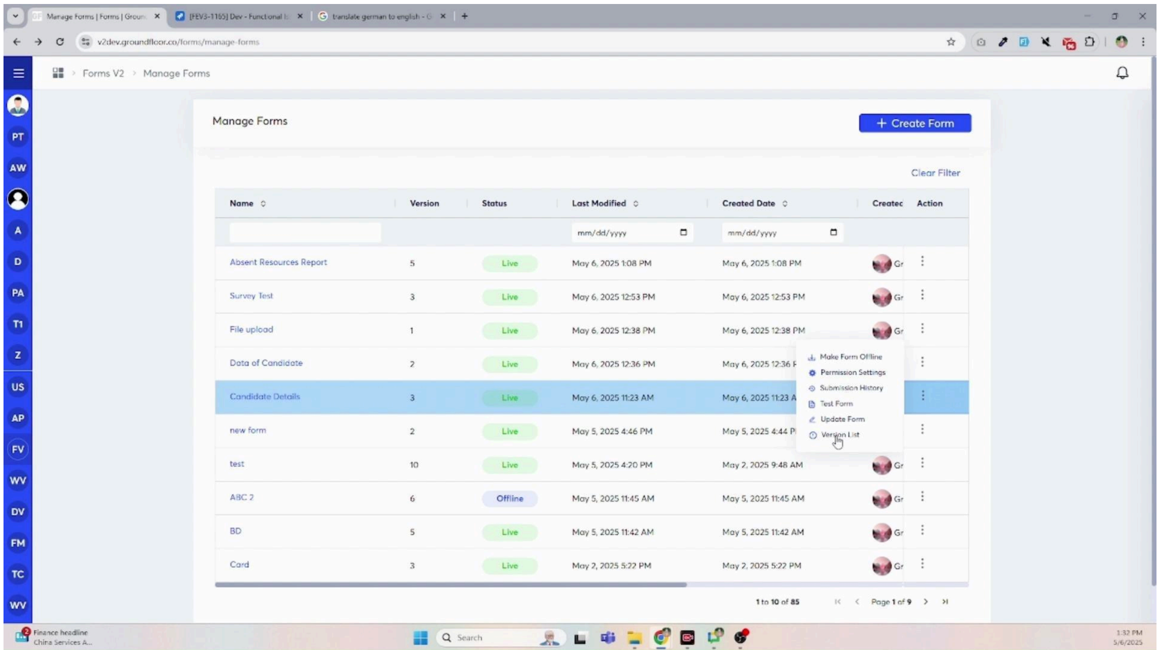
82. Options are:

Step 1: Access Version List

83. On the "Manage Forms" page, select a form (e.g., "Candidate Details").

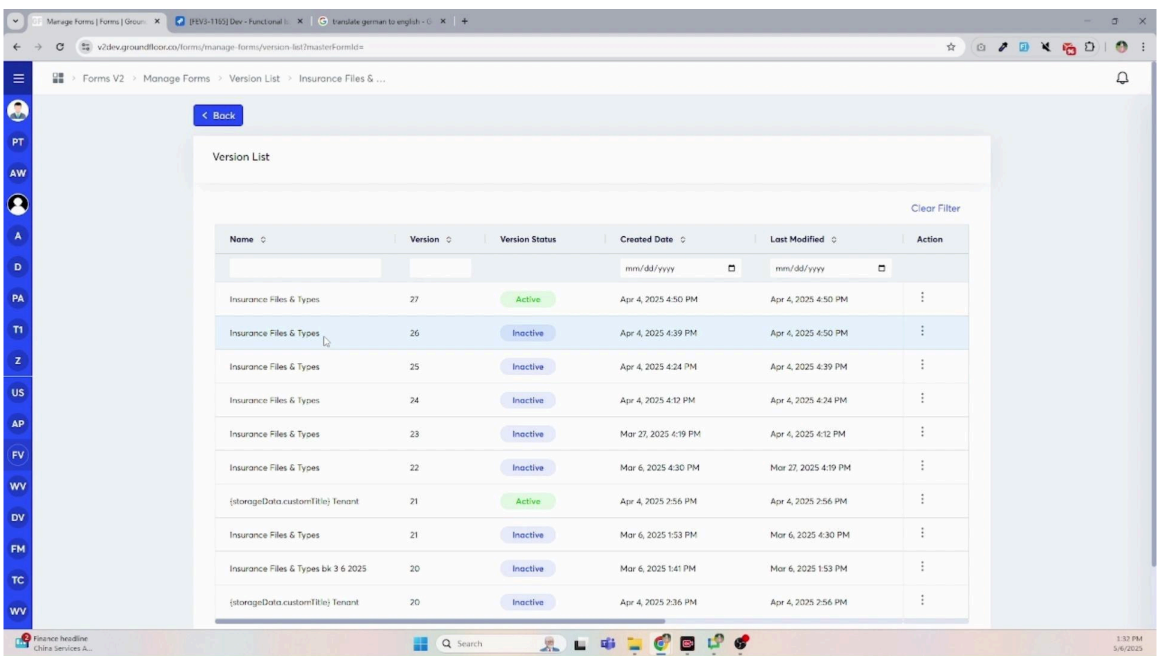


84. Click the three-dot (Action) menu.
85. Select "Version List".

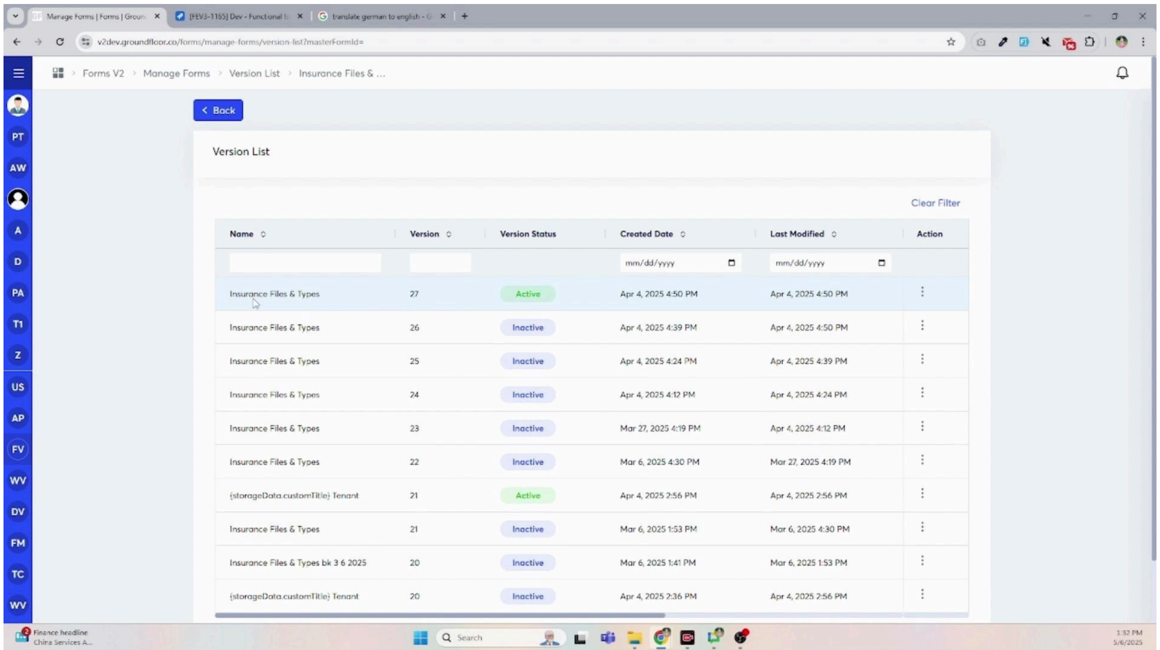


Step 2: View and Manage Versions

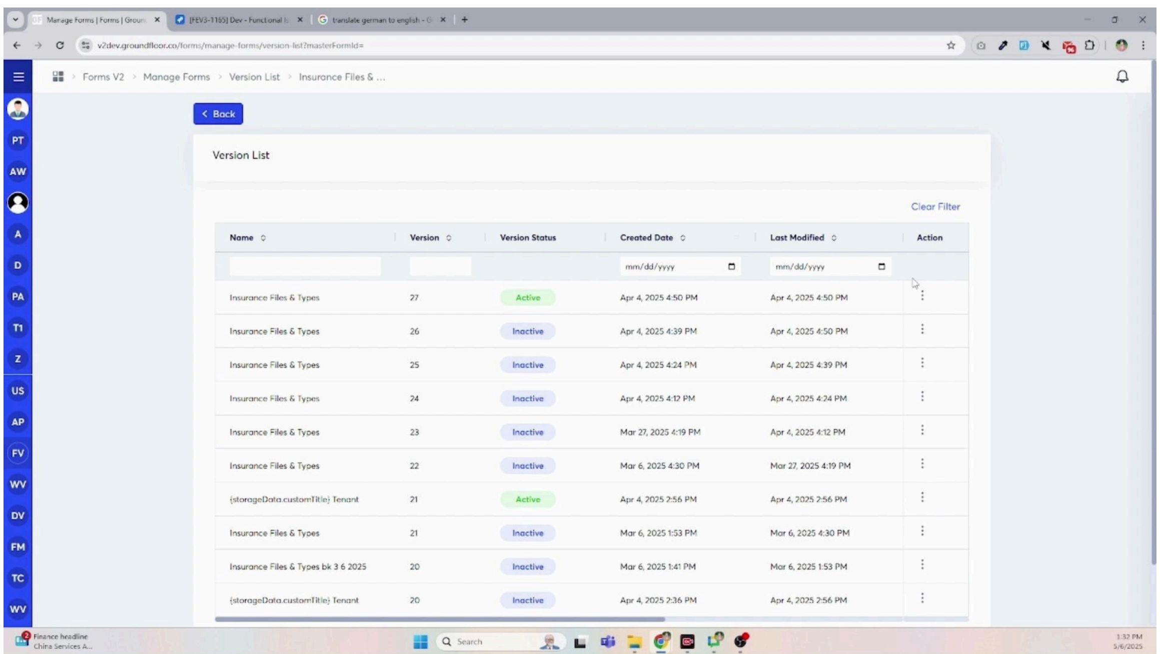
86. The "Version List" page displays all versions of the form.



87. The latest active version is marked as "Active". Previous versions are "Inactive".

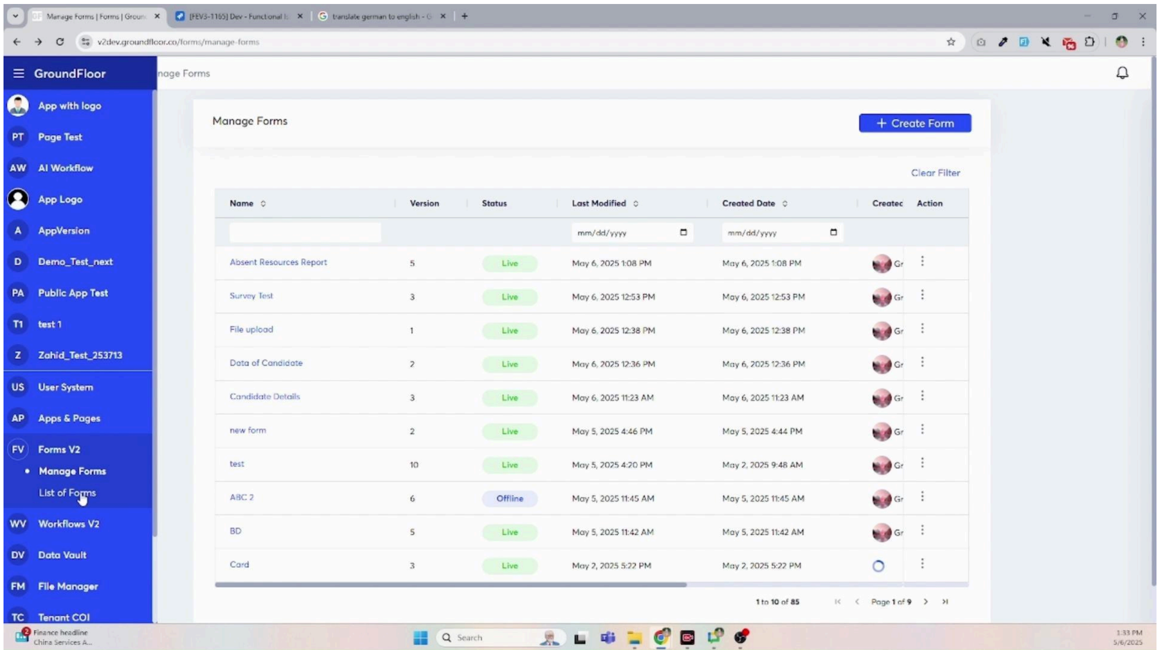


88. For any version, click the three-dot (Action) menu.

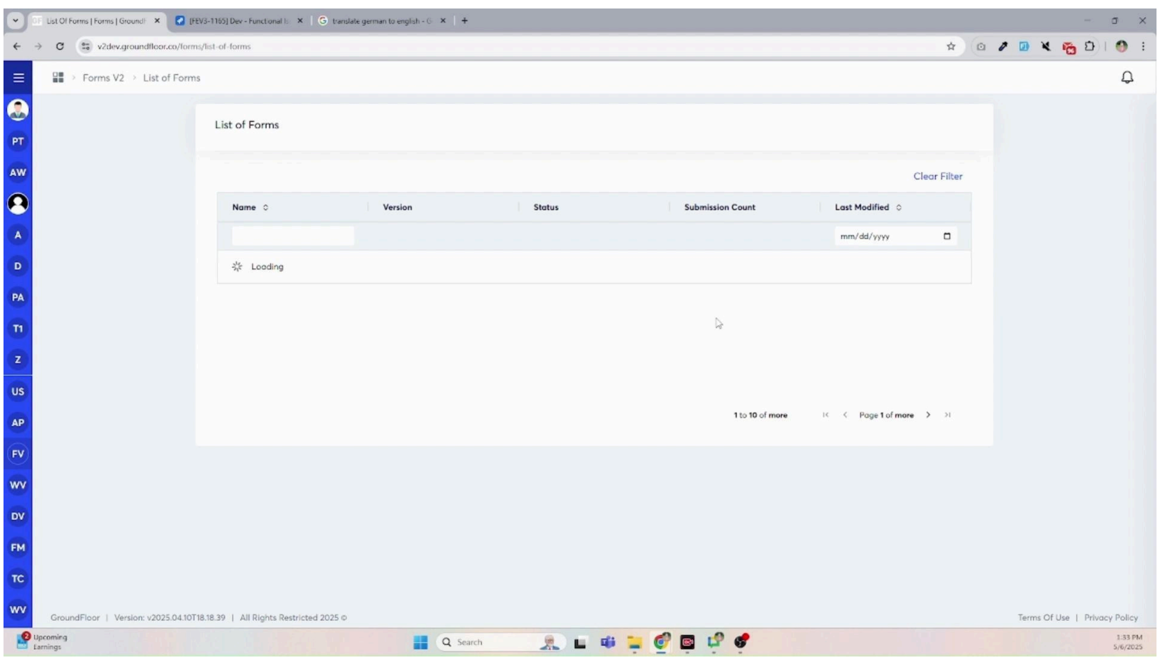


Step 1: Access "List of Forms"

89. From the main navigation menu on the left, under "Forms V2", click "List of Forms".

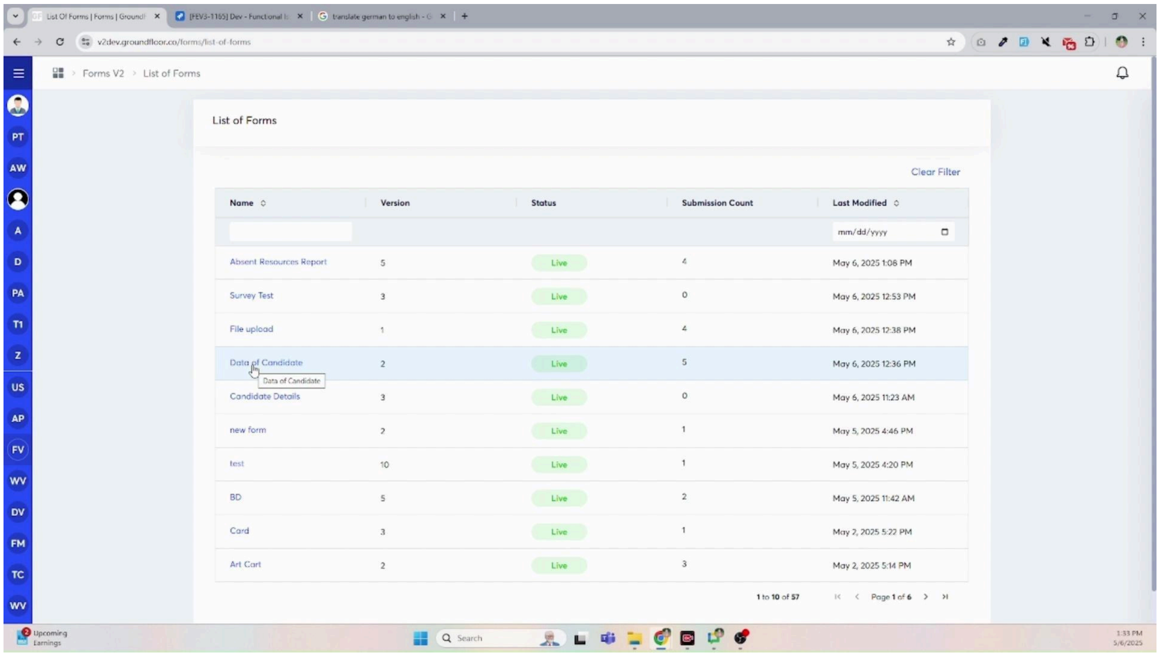


90. This page displays all "Live" forms from the "Manage Forms" page.

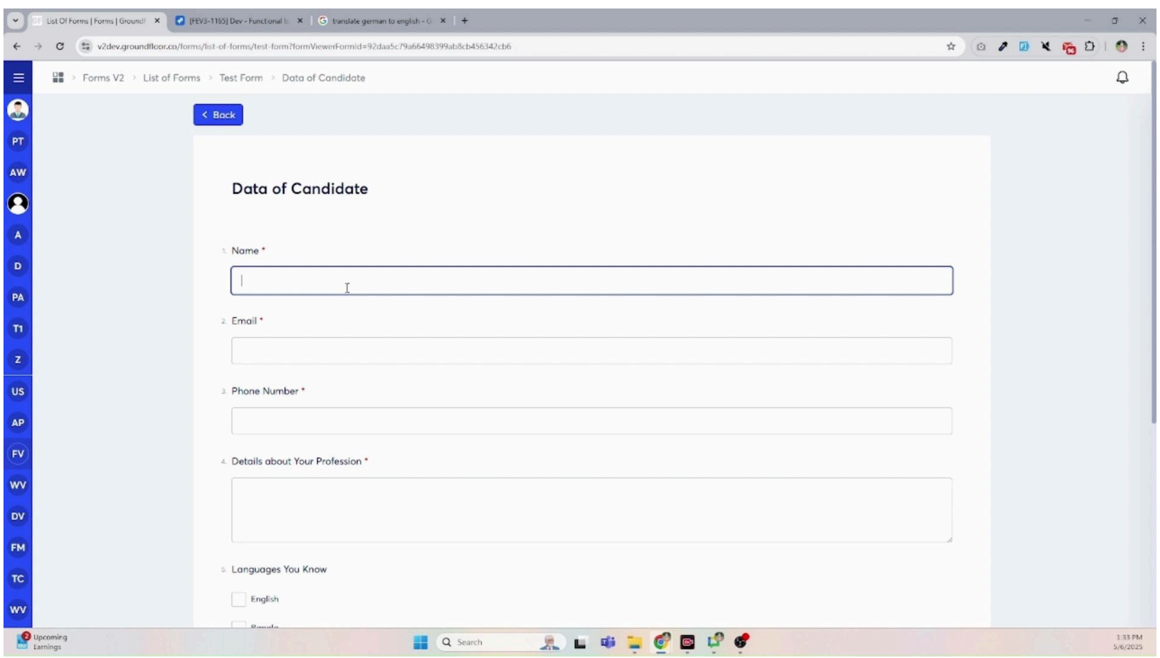


Step 2: Submit a Form from "List of Forms"

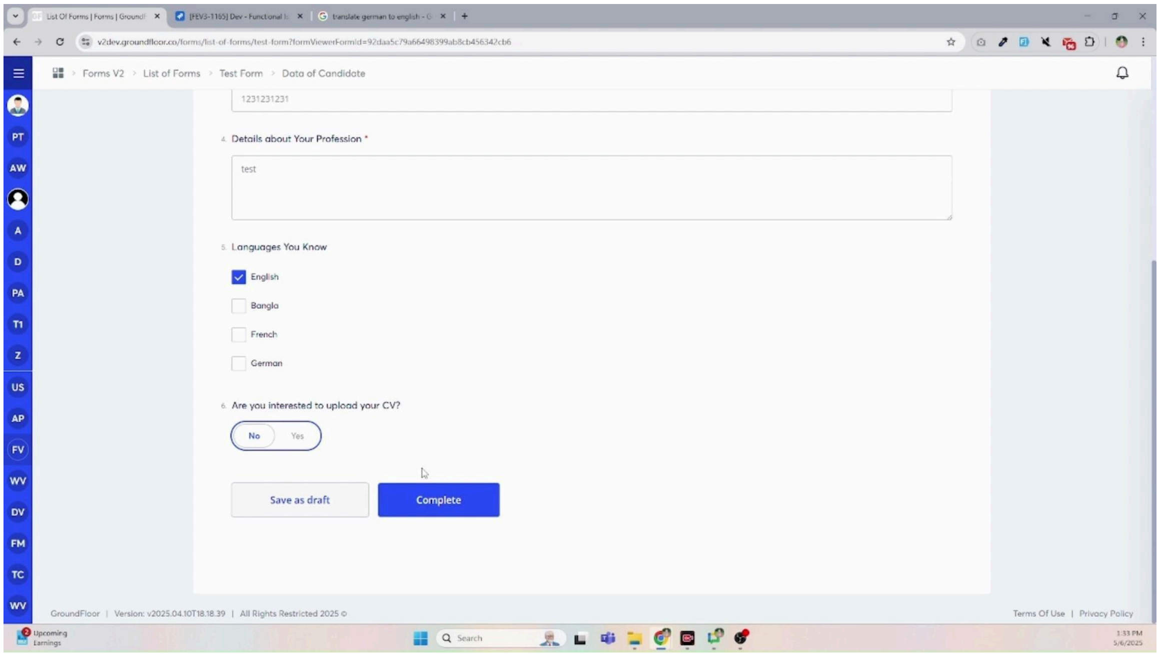
91. Click on the name of the form you want to submit (e.g., "Data of Candidate").



92. The form will open. Fill in the details.

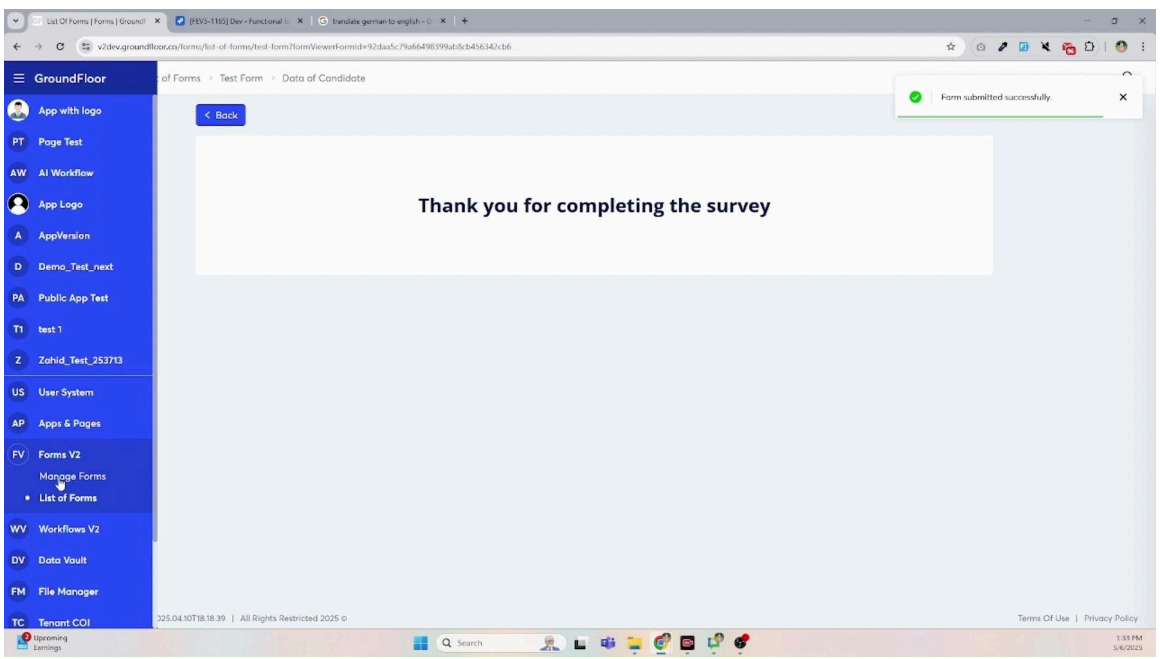


93. Click "Complete".

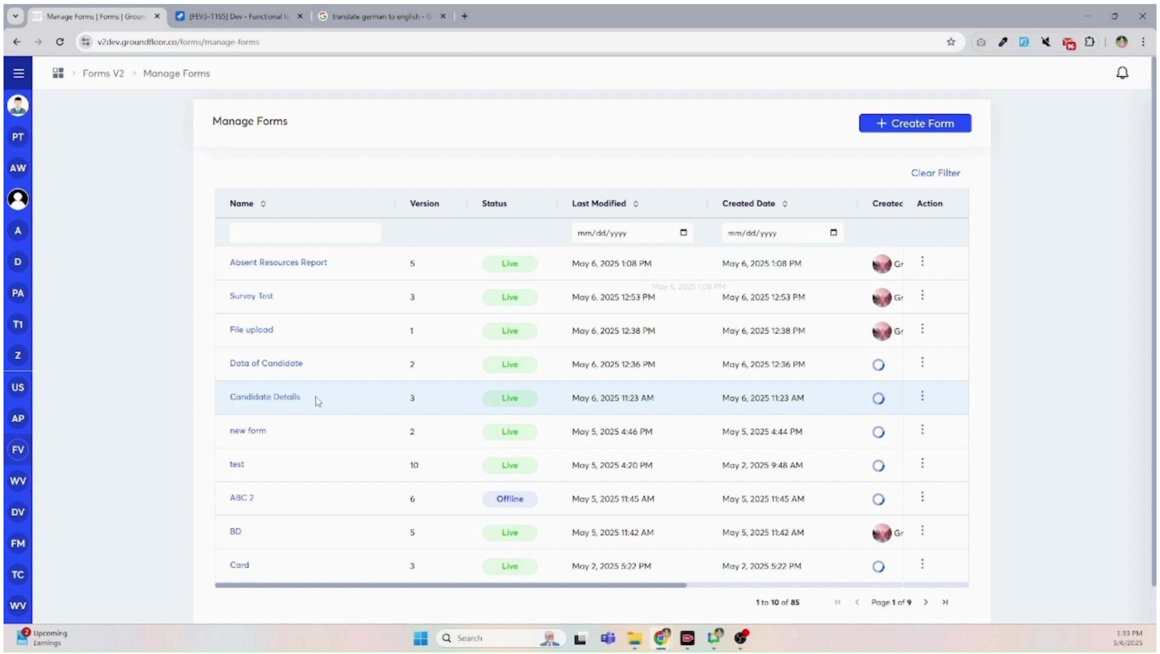


Step 3: Verify Submission

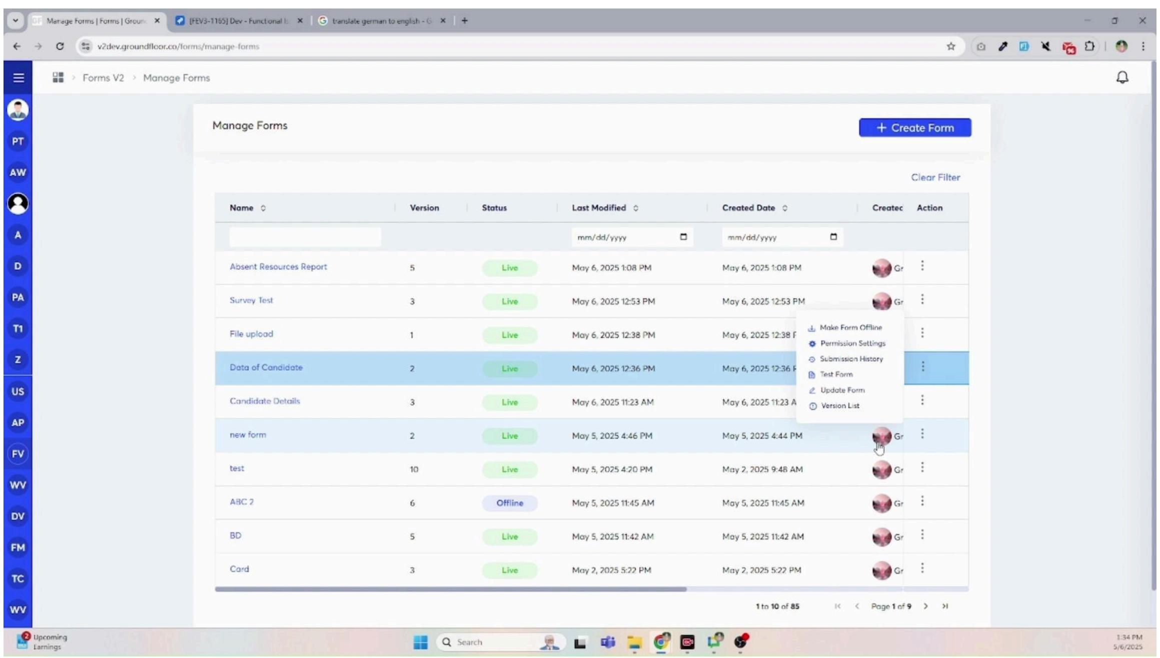
94. Navigate back to "Manage Forms".



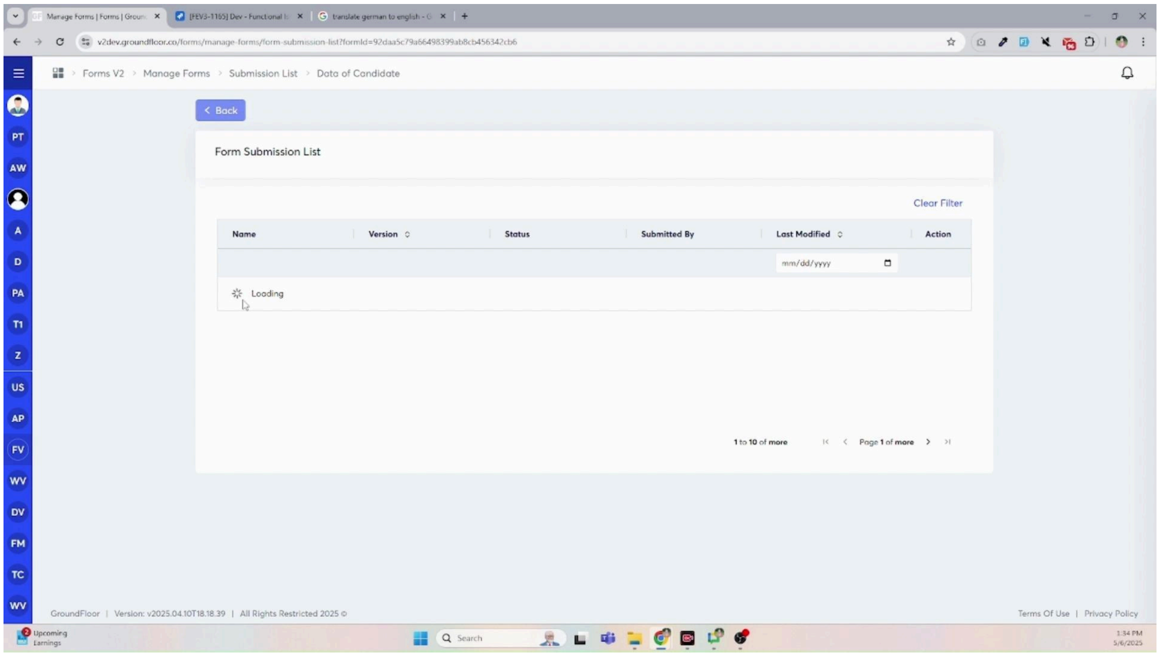
95. Find the form ("Data of Candidate") and click its Action menu.



96. Select "Submission History".



97. The newly submitted form data will appear in the list with "Complete" status.



Forms V2 › Manage Forms › Submission List › Data of Candidate
Back
Form Submission List
Clear Filter
Name
Version
Status
Submitted By
Last Modified
Action
mm/dd/yyyy
Loading
1 to 10 of more
Page 1 of more
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