

Mobile Forms Management

Note: The below guide refers to the New Mobile Form Builder. In case you are still using the old Mobile Form builder, please refer [here](#).

IMPORTANT: *The old Mobile Form builder will be deprecated soon, so we strongly advise you to apply the new one once you get familiarized with it, by pressing “**Apply new Mobile Form builder**”.*

Mobile Forms can be used to send instructions/questionnaires to your employees, ask them questions, or even let them freely fill in any comments or information related to specific Checkpoints/ Sites, they want to share with the monitoring center!

You have total control over Mobile Forms creation, as they are fully customizable.

Adding a new Mobile Form

Once you decide which Mobile Form elements you will include in your form, you can start setting it up by following the steps below:

- Press Company -> Mobile Forms.
- Press on “+Add” button displayed on the top sub-menu; the system opens a new page to add a new Mobile Form.

Adding elements to your Mobile Form

- On the left you can see your available “Form Element” options:
- **Header:** Read Only – Usually used for headings & heavier text. Use it as your Title, Section separator, or to give general instructions to your Workers.
- **Text Input:** Single Line Input – Can be used for short descriptions/comments the Worker would like to share with their Managers.
- **Image:** Read only – Can be used by the Manager to add an image as a reference for the Worker.
- **Text Area:** Multi-Line Input – Use it if you want your Workers to add more detailed information about the matter.
- **Radio:** Can be used for single choice answers.
- **Checkbox:** Usually used for multiple choice answers. Add more than 1 Checkbox elements to achieve that.
- **Select:** Can be used for single choice answers. More compact than the Radio element.
- **Signature:** Can be used to request the Worker to add their signature.
- **Select (Entity Based):** Can be used for searching/selecting a Guard of the system.
- **Image Capture:** Can be used to request the Worker to capture image(s) while filling in the Mobile Form.

- Drag your desired elements and drop them on the right part of the page.
- Once you drop an element, a pop-up window will appear; setup your element based on your needs and once done, press “Save”.

Tip: You can edit your element even after Save.

- You can preview your Mobile Form at any stage during the creation process.

Qr-Patrol PRO Company Clients Routes Resolution Center Reports Actions Log Refresh Mute Notifications Help [marokoumpfestgoi] GOLD PRO BASE

← Back Incident Form Save

Search field(s)

Detailed Incident Report

For emergencies, please call +1 12345 6789.

Please describe the incident that occurred in detail

Also please write down where it happened, and who was involved

During which shift did it occur?

☐ Morning
☐ Day
☐ Night

Please classify the Incident below, by selecting 1 or more categories

☐ Equipment Damage
☐ Accident
☐ Human Error

Other

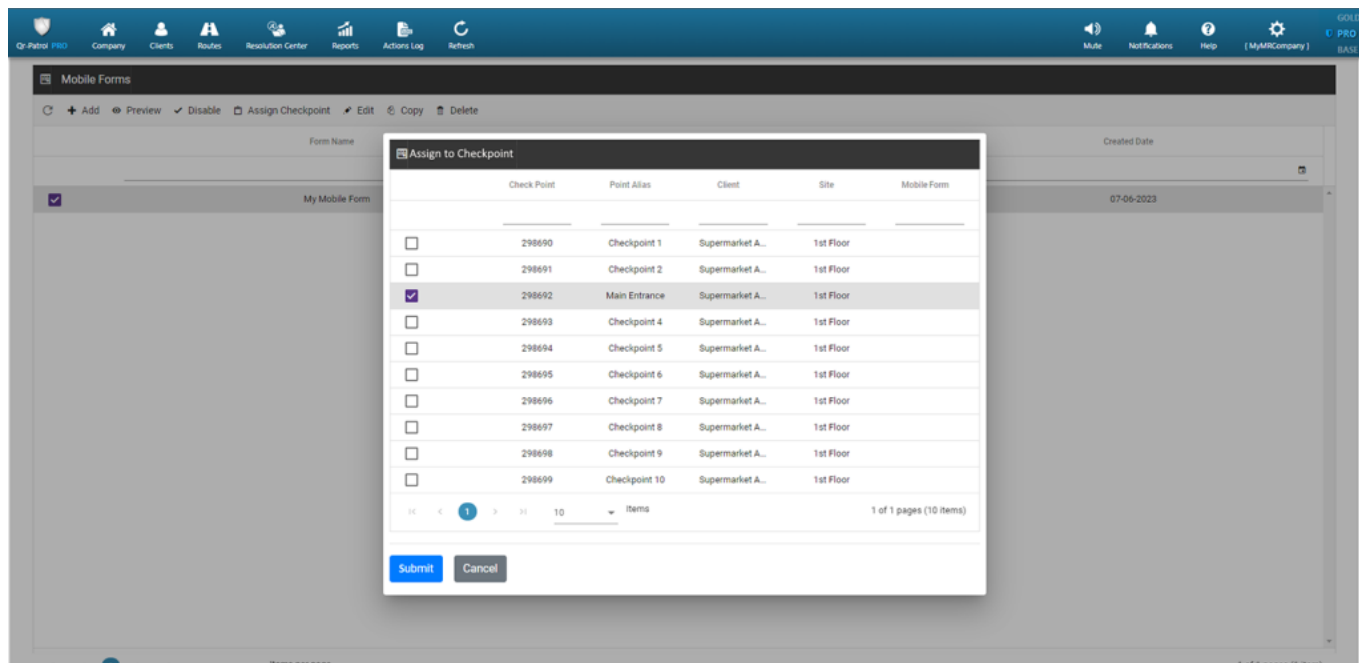
Please add additional details to classify the Incident

- When you are happy with your Mobile Form, add a name under “Name this Form” field and press “Save”.

Assign your Mobile Form to a checkpoint

Once you have created your Mobile Form, you can assign it to a checkpoint(s); this way, it will come up when your Workers scan the respective checkpoint in order to fill-it in.

- From the main page, select your Mobile Form.
- Press “Assign Checkpoint” from the top sub-menu

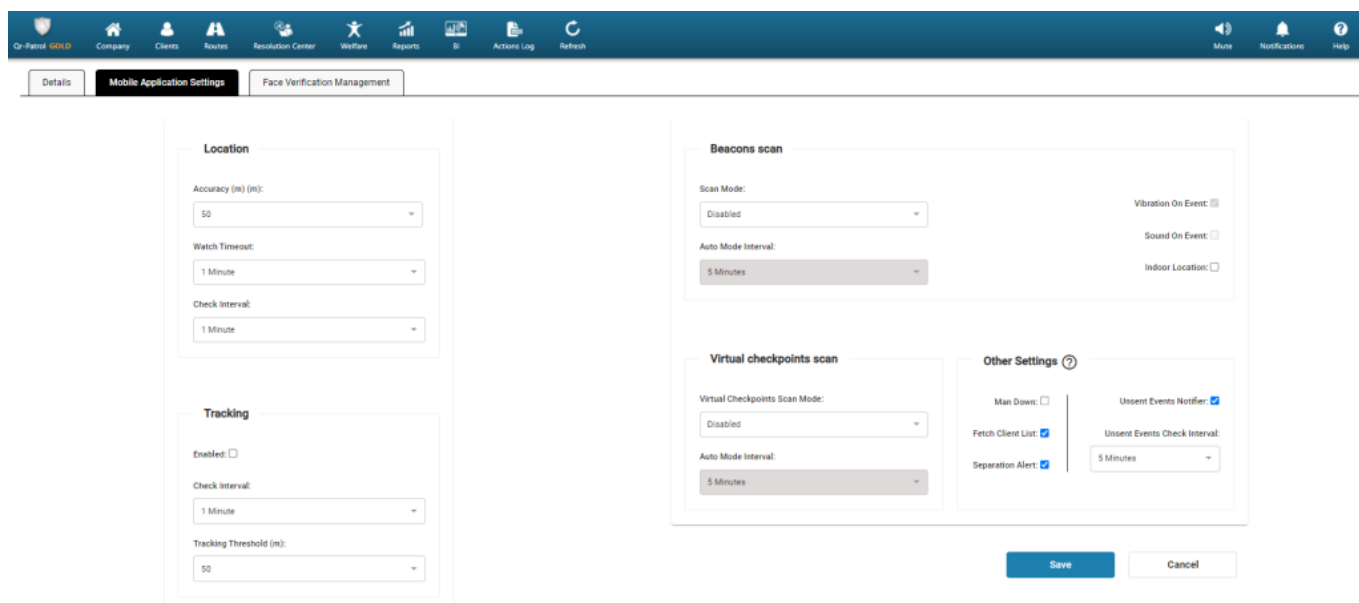


- Locate the Checkpoint(s) you want to assign your Mobile Form to and select them.
- Press “Submit”.

Allow the Guard to send a Mobile Form without physically scanning a checkpoint

If you want your Guards to send a Mobile Form without physically scanning a checkpoint, you can do so by following the steps mentioned below:

- Access your Guard’s settings by navigating to menu “Company” >> “Guards”
- Select and edit the Guard of your interest
- Enable the “Fetch Client List” option

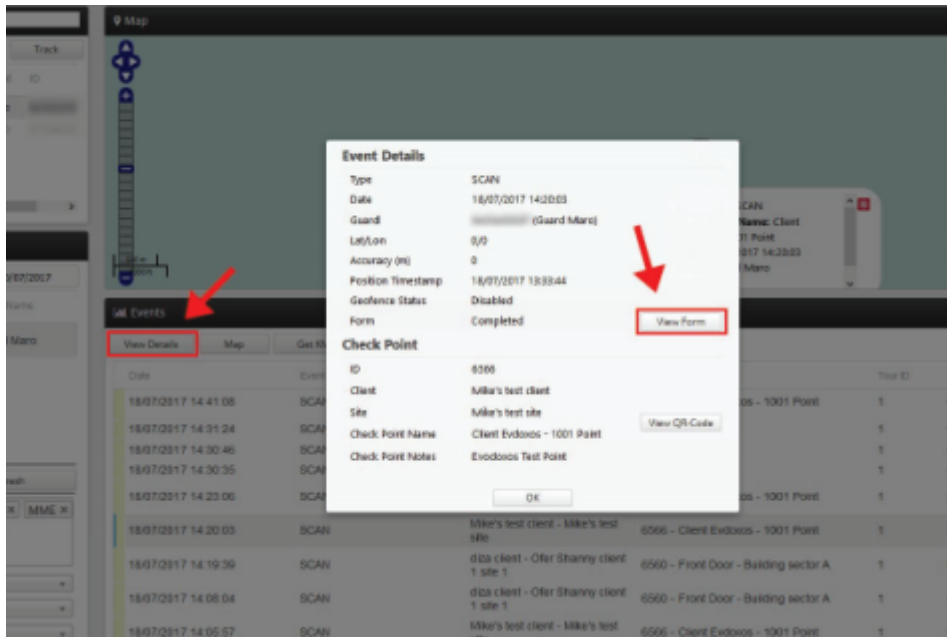


Your Guards will now be able to find and fill-in a Mobile Form without physically scanning a checkpoint, by pressing the “Scan” button in their mobile application and choosing “Mobile Forms”.

View Mobile Forms Answers (Filled-out Forms)

You can check the answered Mobile Forms on the Events Browser either one by one (option 1) or in bulk (option 2):

- Select the target Checkpoint Scan Event from the Events Browser panel
- Press on “View Details” button, to open a pop-up screen with details about the target Scan Event
- Field “Form” will display one of the following values:



1. **Completed** (in such case, you can see the Guard's filled-in details by pressing on the “View Form” button)
2. **Not Completed** (if the Guard performed the checkpoint scan but skipped filling the Form)
3. **Not Available** (if the checkpoint is not associated with any Form)

You can now check the guard's reply in a pop-up window and proceed with your work.

Building A Patrol

Please turn on the lights

Did you see anything suspicious? Please describe it:

there was a car parked in the front entrance

Is the door locked? *

☒ Yes

☐ No

Alternatively, you can export all the submitted Mobile Forms **in bulk** or all the **responses of a specific Mobile Form**, by following the steps below:

- 1) Go to the Events Browser and select the related Guard(s) and Tour(s)
- 2) Add the **“FORMS ATTACHED”** filter by pressing on the filters tab of the Events Browser in order to get on the left side all the Scan Events that include a submitted Mobile Form
- 3) On the left, there will be available the **“Print All Forms”** button. By pressing on it, you have the following options:
 - i) **“Export to PDF”**: export all the submitted, filled-in Mobile Forms to a PDF file
 - ii) **“Export to Excel”**: export all the submitted, filled-in Mobile Forms to an Excel file
 - iii) **“Choose a mobile form”**: select a specific Mobile Form for which you would like to extract all relevant submitted responses

The screenshot displays the Events Browser interface. On the left, there is a sidebar with a 'Tours' section showing a list of tours with checkboxes for selection. Below this, there are filters for 'Event Type' and 'Check Point'. The main area shows a map of the event location with a list of events below it. The events list includes columns for Date, Event Type, Event Details, and Check Point. A dropdown menu is open over the 'Print All Forms' button, showing options: 'Export to PDF', 'Export to Excel', 'Mobile Form', and 'Choose a mobile form'.

Date	Event Type	Event Details	Check Point
2023-09-06 11:12:57	SCAN	Stadium A - Distribution Center	181050 - Main Exit
2023-09-06 11:11:45	SCAN	Stadium A - Distribution Center	181051 - Main Entrance
2023-09-05 16:26:08	SCAN	Supermarket - Front door	221407 - Main Door - Covid Forr
2023-09-04 13:14:48	SCAN	Stadium A - Distribution Center	181051 - Main Entrance
2023-09-01 15:47:54	SCAN	Stadium A - Distribution Center	181051 - Main Entrance
2023-09-01 11:56:07	SCAN	Stadium A - Distribution Center	181050 - Main Exit
2023-08-31 16:17:11	SCAN	Stadium A - Distribution Center	181051 - Main Entrance
2023-08-31 15:44:59	SCAN	Stadium A - Distribution Center	181051 - Main Entrance
2023-08-31 15:44:41	SCAN	Stadium A - Distribution Center	181050 - Main Exit
2023-08-23 09:46:37	SCAN	Stadium A - Distribution Center	181050 - Main Exit
2023-08-23 09:38:49	SCAN	Stadium A - Distribution Center	181051 - Main Entrance