

**Field Inspection and Maintenance Report – Windows Based**

*Sample forms are downloaded with the Mi-Forms Designer and Client Software.*

*As always, please note that Mi-Forms does not come with any “out of the box” forms. All forms are designed to the specifications of the customer. This includes the look and flow of the form, any logic requirements, etc. Some things on a form might seem unusable to a customer, or might not make sense for their environment – that is fine as the client will create or have Mi-Co create a form that looks and works exactly as they need it to.*

*If demo is via webinar, point out that in a real use case there is no scrolling up and down – each page of the form would display as only one page.*

*This form is a good example to show those in field inspections. It is also good to show users who require calculations, or those who require the need to pick from a database but also be able to add new information.*

**Select Client** and note that portion of the form is filled out. This highlights Mi-Forms ability to pull data from a back-end database and pre-fill the form with known information.

 This can work while online or offline

 This form is designed so that the pre-filled information cannot be changed. The form can also be designed so that new information can be entered onto the form and when the form is submitted the new information will be updated into the system.

Also note that the form can auto-generate things such as work order and job number.

**Click GPS** – to show that functionality

**Click Service engineer –** this can be a static dropdown box that is contained in the form, or can be read from database. It could also be pre-filled based on the user credentials.

**Click Start –** Mi-Forms will keep track of when inspection began (and when Stop button is clicked when ended)

**Click Appliance Type –** Here you will see that you type on an appliance and a picture of that appliance automatically appears, with the model number pre-filled.

 Envision that the type of appliance the customer owns is stored in database and only the valid choices appear in drop down box. If the customer owned multiple refrigerator models for example, then multiple choices would appear.

 Another scenario could be that a new order needs to be placed, or some other scenario that would require the ability to choose one item in a drop down box and then logic that would make further choices appear and drill down as needed. Example – choose appliance, then choose manufacturer, then choose applicable model numbers w/ descriptions. Further logic could exist that would ensure that this choice made sense with other choices – for example – “You chose model XYZ which is top vent, therefore you cannot have side vent mount” or the proper choice could be automatically filled in if applicable or there could be drop down box that would contain only proper choices.

In this form the ability to add a new appliance does exist and works as follows:

**Click Add Appliance –** note the ability to enter in a new appliance and model number. Mi-Forms recognition is 99% accurate and has US patents protecting this technology. You don’t need to write especially neat or in the lines. If you make a mistake, simply write over the incorrect information.

**Note the ability import a photo**. If your device has the ability to take a photo that can be built into the form.

**Note the ability to add a** **description** – you write with the stylus and the writing is converted into text. The form can also be designed so that the handwriting stays as is. You can also have the ability to use the keyboard rather than the stylus. Switching modes of entry is accomplished through clicking the appropriate icon on the right side of screen (you may need to click little green arrow before seeing the icons)

**Go back to Service Page**

**Tasks and Actions**

Show that if user has a “simple” action manually enter information on 1st line

Show if more information is required another page is now brought up – user is able to import or take photos depending on device, mark up map that is pulled up for that location, and add notes

**Invoice** – Use drop down box to select a part. Again – this could be read from database, can be contained in a static dropdown box, have drill down logic, etc.

Enter a quantity and note the calculation, add another part and quantity, note calculations.

**Note signature fields** –

Signatures captured in Mi-Forms are legally binding. Mi-forms also offers the ability to integrate signature capture with 3rd parties VeriSign, DocuSign and Adobe Echo.

Note these are highlighted in yellow to show they are required fields. Mi-Forms design team highly recommends using visual cues such as this. If you leave blank and try to submit you will get validation rule error – when you do complete both fields the yellow highlighting goes away and you will be able to submit form. **But first**

**Hit the Stop button** and note that based on logic X amount of hours and dollars are calculated

Finish the form and note that an XML file is being created and 2 pdf forms. Please note that PDF forms can be created in a variety of ways – multiple pages condensed into one page, one page form into multiple pages, bits of information not included on the pdf, etc.

In this case an email should appear in outlook – envision a copy of the report and invoice being automatically generated and emailed to the client, and also an order being auto created so that work on placing this order begins right away.