

# TOOL USER GUIDE

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## FORMBUILDER



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## 1. BUILDING A TEMPLATE

### 1.1 ADDING THE FIRST SECTION TO A TEMPLATE

**Step 1:** To add a new section to your template, select **+ Add New Section**

The screenshot shows the top part of a template editor. At the top left, there is a 'Template Name' field with the value 'Demo' and a 'Save Title' button. To the right, under 'Edit Options', the '+ Add New Section' button is highlighted with a red box. Below this is a 'Form Preview' section with a message: 'You have not added any elements to your form yet. To get started, click 'Add New Section'.'

**Step 2:** A window will pop up where you can fill in details such as section name and fields

The 'Add New Section' dialog box contains the following fields and options:

- Section Name:** A text input field. Annotation: 'Add in the section name'.
- Page Break After:** A toggle switch currently set to 'No'. Annotation: 'Select 'Yes' if you would like further sections to be on the next page'.
- Expand / Collapse:** A toggle switch currently set to 'No'. Annotation: 'Select 'Yes' if you would like to have a minimise section option'.
- Intro Text (Optional):** A text area for instructions regarding completing the section. Annotation: 'Add in instructions for completing the section if applicable'.
- Quick Add Section Fields:** A table with columns 'Label' and 'Type'.
 

Label	Type	Hide Label	Required
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>

 Annotations for the table:
  - For the 'Label' column: 'Add in fields/questions for the template'.
  - For the 'Type' column: 'Select the 'Field Type' for each field'.

At the bottom right of the dialog are 'Cancel' and 'Add Section' buttons.

Field Types are explained further in the **Appendix**.

### Step 3: Select Add Section

**Add New Section**

Section Name

Page Break After ☐ No

Expand / Collapse ☐ No

Intro Text (Optional)  
Instructions regarding completing section

Quick Add Section Fields

Label	Type	Hide Label	Required
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	-- Please Select --	<input type="checkbox"/>	<input type="checkbox"/>

Cancel Add Section

### Step 4: To edit/delete the section, select the edit button

Template Name  Save Title

Edit Options Add New Reorder Triggers Scoring Criteria

Form Preview

☒ Demo

### Step 5: Select either **Update Section** when happy with changes, or **Delete Section** if necessary

**Update Section - Demo**

Section Name

Parent Section

Page Break After ☐ No

Expand / Collapse ☐ No

Visible ☒ Always ☐ Condition Based

Intro Text (Optional)  
Instructions regarding completing section

Instructions regarding completing section

Delete Section Cancel Update Section

## 1.2 ADDING ADDITIONAL SECTIONS

### Step 1: Select + Add New, Section

The screenshot shows the 'Form Preview' interface. At the top, there's a 'Template Name' field with 'Test' and a 'Save Title' button. Below it is a 'Form Preview' section with a 'Demo' section. On the right, the 'Edit Options' menu is open, showing 'Add New' (highlighted with a red box), 'Reorder', 'Triggers', and 'Scoring Criteria'. The 'Add New' dropdown is open, showing 'Section' (highlighted with a red box), 'Standard Field', and 'External Field'.

### Step 2: Complete the details as seen in section 1.

## 1.3 ADDING ADDITIONAL FIELDS

### Step 1: Select + Add New, Standard Field

The screenshot shows the 'Form Preview' interface. At the top, there's a 'Template Name' field with 'Test' and a 'Save Title' button. Below it is a 'Form Preview' section with a 'Demo' section. On the right, the 'Edit Options' menu is open, showing 'Add New' (highlighted with a red box), 'Reorder', 'Triggers', and 'Scoring Criteria'. The 'Add New' dropdown is open, showing 'Section', 'Standard Field' (highlighted with a red box), and 'External Field'.

### Step 2: Fill in the details below and select **Add Field**

The screenshot shows the 'Add New Field' form. The fields and their annotations are as follows:

- Field Label:** A text input field with a 'Show' button. Annotation: 'Add in the field label'.
- Section:** A dropdown menu with 'Demo' selected. Annotation: 'Select the section you want the field to be added to'.
- Field Type:** A dropdown menu with '-- Please Select --' selected. Annotation: 'Select the field type'.
- Help Text:** A text input field. Annotation: 'Add help text & image if required'.
- Help Image:** A 'Choose file' button and 'No file chosen' text. Annotation: 'Add help text & image if required'.
- Required:** Radio buttons for 'No' (selected), 'Always', and 'Condition Based'. Annotation: 'Select whether the field is mandatory required and/or visible'.
- Visible:** Radio buttons for 'Always' (selected) and 'Condition Based'. Annotation: 'Select whether the field is mandatory required and/or visible'.
- Show in Completed Table:** A toggle switch set to 'No'. Annotation: 'Toggle 'Yes' if required'.
- Buttons:** 'Cancel' and 'Add Field' (highlighted with a red box).

*N.B. See section 1.4 on managing condition-based fields.*

Another way to add additional fields is the Quick Add button

### Step 1: Select + Quick Add Section Fields

The screenshot shows the top of a form editor. On the left, there's a 'Template Name' field with 'Test' and a 'Save Title' button. On the right, there are 'Edit Options' buttons: 'Add New', 'Reorder', 'Triggers', and 'Scoring Criteria'. Below this is a 'Form Preview' section with a 'Demo' button. In the top right corner of the preview area, there is a 'Quick Add Section Fields' button, which is highlighted with a red box.

**Step 2:** Add in **Field Labels** and select the **Field Type**. Select **Update Section** when complete.

The screenshot shows a dialog box titled 'Update Section - Demo'. Inside, there's a table for 'Quick Add Section Fields'. The table has four columns: 'Label', 'Type', 'Hide Label', and 'Required'. There are ten rows, each with an empty text input for the label, a dropdown menu for the type (all set to '-- Please Select --'), and checkboxes for 'Hide Label' and 'Required'. At the bottom right of the dialog, there are 'Cancel' and 'Update Section' buttons. The 'Update Section' button is highlighted with a red box.

## 1.4 ADDING CONDITIONS TO FIELDS

Conditions can be applied to certain fields if you want them either to be mandatory or visible, based on certain conditions. For example, if 'Yes' is selected for the first question, the second can be set as mandatory and visible. See below for an example.

The fields I will use as examples are below:

The screenshot shows two example fields in a form. The first field is a checkbox labeled 'Has there been any product recalls this month?' followed by a dropdown menu set to '--Please Select--'. The second field is a checkbox labeled 'Please select the reason for these recalls' followed by a dropdown menu set to '--Please Select--'.

The first field is a yes/no answer.

### Step 1: Select edit beside the second field

The screenshot shows the same two example fields. The edit icon (a small square with a pencil) next to the second field's checkbox is highlighted with a red box.

**Step 2:** You will now set up that this field is required condition based. Select **Required Condition Based**, then select **Click Here**

**Update Field**

Field Label: Please select the reason for these recalls [Show](#)

Section: Demo

Field Type: Standard Dropdown - Single

Options: [Add](#)

Help Text: [Choose file](#) No file chosen

Help Image: [Choose file](#) No file chosen

**Required** ⓘ ☐ No ☐ Always ☒ Condition Based

**Visible** ⓘ ☒ Always ☐ Condition Based

Show in Completed Table ⓘ ☐ No

Conditions [Click Here](#) to manage the condition(s) which will dictate when this field will be visible or required

[Delete Field](#) [Cancel](#) [Update Field](#)

**Step 3:** Once you have selected Click Here, a new window will pop up. Select **+ Add Condition**

To add a new condition click the 'Add Condition' button below. When you are finished click the 'Done' button to return to the Form.

[+ Add Condition](#) [Cancel](#) [Done](#)

Field	Condition Rules	Determines Required	Determines Visibility
You have not added any conditions.			

**Step 4:** Fill out the form details and select **Save**.

In this case, you are stating that if 'Yes' has been answered to 'Has there been any product recalls this month?', then the field 'Please select the reason for these recalls' will be both **Required & Visible**.

Select the field which will impact the requirement/visibility of that in question

Select the answer which impacts the field

Select if this will impact if it is Required and Visible

[Cancel](#) [Save](#)

## 1.5 ADDING EXTERNAL FIELDS TO THE TEMPLATE

*Certain tools have the ability to include external fields. External fields can be used to pull supplier information from other tools within Foods Connected.*

**Step 1:** Select **Add New** and select **External Field** from the dropdown options.

The screenshot shows the 'Add New' dropdown menu open, with 'External Field' highlighted. The 'Form Preview' section shows a 'Demo' form with a 'Save Title' button.

**Step 2:** Enter the external field details and select **Add Field** when the details have been entered.

The screenshot shows the 'Add Field' form with the following fields and annotations:

- Section:** Demo (dropdown) - Select the section to add the field to
- Field Label:** Do you currently hold BRC Agents and Brokers certification (text input) - Give the field a label
- Tool:** Questionnaire Manager (dropdown) - Select the Tool, Template and Form Type the field of interest is in
- Template:** Agent/Broker Details questionnaire (dropdown) - Select the Tool, Template and Form Type the field of interest is in
- Form Type:** Questionnaire (dropdown) - Select the Tool, Template and Form Type the field of interest is in
- External Field:** Agent/Broker Details - Do you currently hold BRC Agents and Brokers certification (dropdown) - Select the field of interest
- Show Value Only When Closed/Confirmed:** No (toggle) - Select toggles to 'Yes' if applicable
- Update Status When Changed:** No (toggle) - Select toggles to 'Yes' if applicable
- Status After Update:** In Progress (dropdown)
- Retrieval Type:** Latest Weighting (radio button)
- Option Weightings:**

Option	Weighting
Yes	5
No	10

- Scores can be assigned to answers if applicable

## 1.6 EDITING / DELETING FIELDS

**Step 1:** Select the **Edit Field** button

The screenshot shows the 'Edit Field' form. The 'Form Preview' section shows a 'Demo' form with a 'Save Title' button. The 'Product Type' field is highlighted with a red box, indicating it is selected for editing.

**Step 2:** Update any details and then select **Update Field**, or if necessary, select **Delete Field**

## 1.7 DUPLICATING A SECTION / FIELDS

There is the ability to duplicate a section and its fields, or just the fields on their own.

**Step 1:** Beside the section title, select the arrow which implies the duplicate function

**Step 2:** Choose to either duplicate the section & fields, or the fields only

**Step 3:** A window will pop up which allows you to customize the duplicate

**Duplicate Section - Demo**

Duplicate Section Name

Parent Section

Place After

Page Break After ☐ No

Expand / Collapse ☐ No

Visible ☒ Always ☐ Condition Based (conditions will be inherited)

Intro Text (Optional)  
Instructions regarding completing section

Fields to Copy ☒ All ☐ Select Individually

Duplicate Field Conditions ☒ Yes ☐ No

Enter the new section name

Select a parent section if applicable – this means the new section will be a sub-section of the parent

Select the section you would like it placed after

You can set conditions & add intro text if applicable

Intro Text (Optional)  
Instructions regarding completing section

Fields to Copy ☒ All ☐ Select Individually

Duplicate Field Conditions ☒ Yes ☐ No

Duplicate Field Triggers ☒ Yes ☐ No

Duplicate Scoring Criteria ☒ Yes ☐ No

Choose the fields you wish to copy

Choose if you would like to duplicate field conditions, triggers and scoring criteria

#### Step 4: Select Create Duplicate

**Duplicate Section - Demo**

Parent Section: None

Place After: None

Page Break After: No

Expand / Collapse: No

Visible: ☒ Always ☐ Condition Based (conditions will be inherited)

Intro Text (Optional)  
Instructions regarding completing section

Fields to Copy: ☒ All ☐ Select Individually

Duplicate Field Conditions: Yes

Duplicate Field Triggers: Yes

Duplicate Scoring Criteria: Yes

Cancel Create Duplicate

## 2. REORDERING SECTIONS / FIELDS

#### Step 1: Select Reorder and choose Sections / Fields where applicable

Template Name: Test Save Title

Edit Options: Add New Reorder Triggers Scoring Criteria

Form Preview: Demo

Reorder Sections Fields

#### Step 2: Hover over the arrows on the field you wish to move and use a drag and drop action until happy with the order

To re-order fields click and drag the corresponding field icon (⬆️) to the new required position. When you are finished click the 'Done' button to save your changes.

Cancel Done

Demo

Number of recalls

Product Type

### Step 3: Click **Done** when complete

## 3. APPENDIX – EXPLANATION OF FIELD TYPES

### TEXT

#### Textbox – Single line text input

#### Textarea – Multiple line text input

*Drag the bottom right-hand corner of the textbox to expand it.*

### NUMERIC

#### Numeric

*With numeric fields, there are decimal and unit options which you can edit when you update the field. You can also change a single numeric field into a counter.*

#### Numeric (2/3/4/5 values)

With multiple value numeric fields, you have the same options for decimals and units, as well as the option for labels, these can all be selected per value.

Value Labels		Value 1	Value 2
Decimal Places			2nd
Decimal Rounding		Yes	
Units		g	kg

### Numeric Limited - within given min/max range



The numeric limited field allows you to set a numeric range so users can only input numbers within that range into the field.

Numeric Limited - within given min/max range	Between 0 and 100
--	-------------------

If a number outside of that range is input, a warning message will appear.

Numeric Limited - within given min/max range	101	* Between 0 and 100 only
--	-----	--------------------------

With numeric limited fields, you have the same options for decimals and units as well as the min/max range.

Min/Max		0	to	100
Decimal Places				
Decimal Rounding		Yes		
Units		N/A		

### Calculation

Numeric fields can be used in a calculation field along with standard functions and numbers. The calculation field has the same decimal and unit options as numeric fields.

Calculation	Section 1: Numeric * 100
-------------	--------------------------

The calculation is set in the formula bar by searching for the chosen fields, functions and/or numbers and clicking on them to add them into the formula. Use the arrow keys to move back and forward through the formula.

Hovering over the question mark gives some function examples.

Required	<div> <div>Custom Functions Examples</div> <div> <p><i>Averages ignoring Zeroes</i> <b>AVERAGE(1 ^ 2 ^ 0 ^ 3)</b></p> <p><i>Division by Zero returns Zero</i> <b>1 DIVALLOWZERO 0</b></p> </div> </div>	Always <input type="radio"/> Condition Based <input type="radio"/>
Visible		<input type="radio"/> Condition Based
Show in Comp		
Calculation Formula ?	<div> <div>?</div> <div>num</div> </div>	
Section 1: <b>Numeric</b>		

## IMAGES/FILES

**Images(s) – small image(s) with a description**

**Large Images(s) – large image(s) with a description**

*Each image field has three options for attaching images to a form with optional descriptions. Only the following image types can be used - .jpg, .jpeg, .png, .bmp and .gif.*

Images(s) – small image(s) with a description ⓘ	Choose file	No file chosen	Enter image description
	Choose file	No file chosen	Enter image 2 description
	Choose file	No file chosen	Enter image 3 description
Large Images(s) – large image(s) with a description ⓘ	Choose file	No file chosen	Enter image description
	Choose file	No file chosen	Enter image 2 description
	Choose file	No file chosen	Enter image 3 description

**File - document with a description**

*Each file field has one option for attaching a file with an optional description.*

File - document with a description	Choose file	No file chosen	Enter document description
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## Signature Box

The signature box field has a textbox for typing the sign off name as well as a box to draw the signature using your mouse on the desktop or finger on the app. The 'Undo Previous Stroke' and 'Clear' buttons can be used to fix mistakes made in the signature box.

## DATES & TIMES

### Date – Select a date from a Calendar

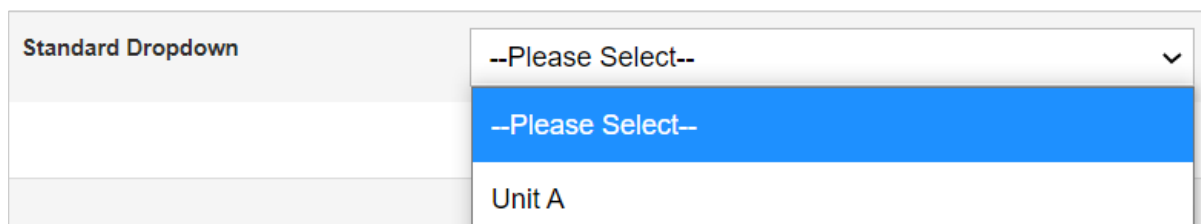
### Time - Select a time from a Timepicker

Type your time into a time field or select it from the timepicker.

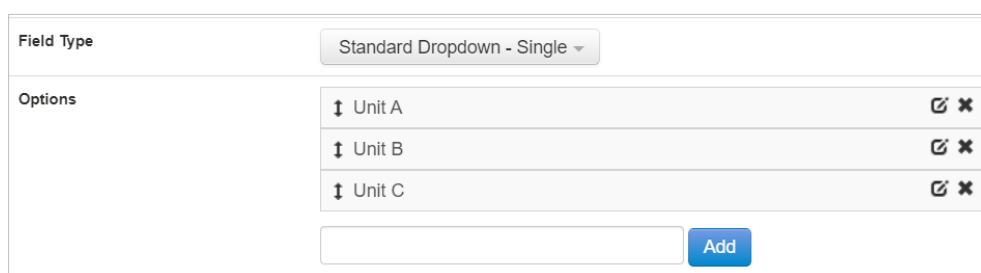
## DROPDOWNS

### Standard Dropdown - Single selection from custom options

Use the standard dropdown field to build a set list of options for your question. Type each option into the textbox and click on 'Add' to insert it. The options can be edited or deleted from the buttons to the right-hand side of each option.



The image shows a 'Standard Dropdown' field. On the left, there is a label 'Standard Dropdown'. To its right is a dropdown menu. The dropdown menu is currently open, showing a list of options. The top option is '--Please Select--' with a downward arrow. Below it is another '--Please Select--' option, which is highlighted in blue. Below that is the option 'Unit A'.

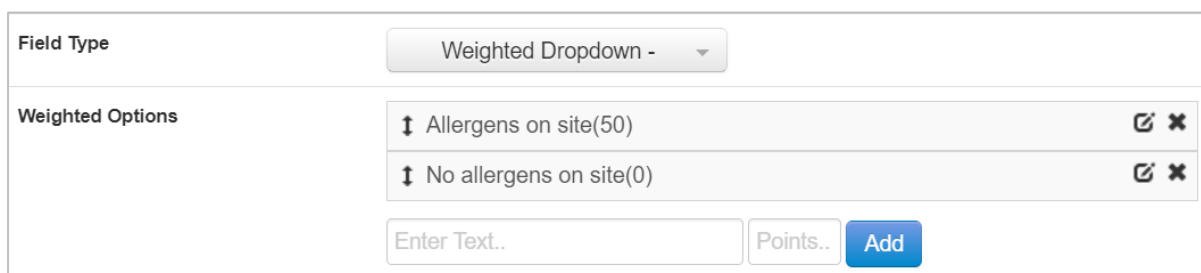


The image shows the configuration for a 'Standard Dropdown - Single' field. The 'Field Type' is set to 'Standard Dropdown - Single'. Below this, there is a section for 'Options'. It contains a list of three options: 'Unit A', 'Unit B', and 'Unit C'. Each option has a small upward and downward arrow icon to its left and a pencil icon and an 'x' icon to its right. Below the list of options is a text input field and an 'Add' button.

### Weighted Dropdown - Single selection from custom options, with scoring assigned.

Weighted options can be used when using scoring on your template, available in various tools.

Use the weighted dropdown field to build a set list of options for your question and add points to each dropdown option. Type each option and their points into the textbox and click on 'Add' to insert it. The options can be edited or deleted from the buttons to the right-hand side of each option.



The image shows the configuration for a 'Weighted Dropdown' field. The 'Field Type' is set to 'Weighted Dropdown'. Below this, there is a section for 'Weighted Options'. It contains a list of two options: 'Allergens on site(50)' and 'No allergens on site(0)'. Each option has a small upward and downward arrow icon to its left and a pencil icon and an 'x' icon to its right. Below the list of options is a text input field labeled 'Enter Text..' and a 'Points..' input field, followed by an 'Add' button.

### Dropdown with Quantity - single selection option with number

*This field has a numeric field which you can set decimal places and units for, as well as a custom dropdown field which works the same as the standard dropdown field.*

**Dropdown with Quantity**

Enter a value

--Please Select--

--Please Select--

packs

Field Type: Dropdown with Quantity -

Options:

- ↑ packs
- ↑ pallets

Add

Decimal Places:

Decimal Rounding: ☒ Yes

Units: N/A

### Dropdown with Comment - single selection option with comment

*The dropdown with comment field works in the same way as the standard dropdown field but you also have the option to input a comment which will save beside the selected dropdown option.*

**Dropdown with Comment**

--Please Select--

Enter a comment

**Yes/No - Single selection yes/no**

Yes/No - Single selection	<div>--Please Select-- --Please Select-- Yes No</div>
---------------------------	---

**Yes/No - Single selection with optional comment**

Yes/No with Comment	<div>--Please Select--</div> <div>Enter a comment</div>
---------------------	---

**Linked Dropdown – Option dependent on another dropdown**

The linked dropdown option allows you to link the options of two dropdowns, so the linked dropdown field options are limited based on what was selected for the initial dropdown field. The options for this field as set up in the same way as a standard dropdown but when editing the field, you can select a parent field. Then click on 'Update & Manage Linked Options' to set the links between the field options.

**Update Field**

Field Label: Linked Dropdown Show

Section: Section 1

Field Type: Linked Dropdown - option

Parent: Section 1 - Standard Dropdown

Options:

- Line 1
- Line 2
- Line 3
- Line 4

Add

Help Text:

Help Image: Choose file No file chosen

Delete Field Cancel Update Field Update & Manage Linked Options

**Product Check Manager - Update Form - Linked Options** Back

Test - Linked Dropdown Cancel Done

Setup all necessary pairings below. When you are finished click the 'Done' button to return to the Form.

Field Option	Parent Options
Line 1	<input checked="" type="checkbox"/> Unit A <input type="checkbox"/> Unit B <input type="checkbox"/> Unit C
Line 2	<input type="checkbox"/> Unit A <input checked="" type="checkbox"/> Unit B <input type="checkbox"/> Unit C

**Standard Dropdown** Unit A

**Linked Dropdown**

--Please Select--

--Please Select--

Line 1

**Numeric Dropdown – Set min/max and increment**

*With the numeric dropdown field, you can set the minimum and maximum numbers as well as the increment to create a dropdown list of numbers.*

Update Field	
Field Label	Numeric Dropdown <span>Show</span>
Section	Section 1 <span>▼</span>
Field Type	Numeric Dropdown - set <span>▼</span>
Min/Max	0 to 2
Increment	0.5

Numeric Dropdown	
	<div>--Please Select-- <span>▼</span></div> <div>--Please Select--</div> <div>0</div> <div>0.5</div>

## CHECKBOXES

### Standard Checkboxes – Multiple choice from custom options

*The checkbox field is set up with options the same as a dropdown field but when completing questions using this field type you can select multiple options.*

Standard Checkboxes	
	<input type="checkbox"/> Department 1 <input type="checkbox"/> Department 2 <input type="checkbox"/> Department 3
Field Type	Standard Checkboxes - <span>▼</span>
Options	<div> <div>↑ Department 1</div> <div>↑ Department 2</div> <div>↑ Department 3</div> </div> <div> <span>✎</span> <span>✕</span> <span>✎</span> <span>✕</span> <span>✎</span> <span>✕</span> </div> <div> <input type="text"/> <span>Add</span> </div>

## Weighted Checkboxes - Multiple choice from custom options, with scoring assigned.

Weighted options can be used when using scoring on your template, available in various tools.

Use the weighted checkbox field to build a set list of options for your question and add points to each checkbox option. Type each option and their points into the textbox and click on 'Add' to insert it. The options can be edited or deleted from the buttons to the right-hand side of each option.

When completing questions using this field type you can select multiple options.

Field Type	
Weighted Checkboxes -	
Weighted Options	<div> <div>↑</div> <div>Nuts (10)</div> <div>✎ ✕</div> </div>
	<div> <div>↑</div> <div>Egg (10)</div> <div>✎ ✕</div> </div>
	<div> <div>↑</div> <div>Fish (10)</div> <div>✎ ✕</div> </div>
	<div> <div>↑</div> <div>No allergens on site (0)</div> <div>✎ ✕</div> </div>
	<div> <input type="text" value="Enter Text.."/> <input type="text" value="Points.."/> <input type="button" value="Add"/> </div>

## GRIDS

### Grids – Textboxes and Checkboxes

The grid field type allows you to create custom tables with column and row names.

Field Type																	
Textboxes																	
Column Names	<div> <div>↑</div> <div>a</div> <div>✕</div> </div>																
	<div> <div>↑</div> <div>b</div> <div>✕</div> </div>																
	<div> <div>↑</div> <div>c</div> <div>✕</div> </div>																
	<input type="text"/>																
	<input type="button" value="Add"/>																
Row Names	<div> <div>↑</div> <div>1</div> <div>✕</div> </div>																
	<div> <div>↑</div> <div>2</div> <div>✕</div> </div>																
	<div> <div>↑</div> <div>3</div> <div>✕</div> </div>																
	<input type="text"/>																
	<input type="button" value="Add"/>																
<div> <div>Textboxes Grid</div> <div>Please note: Grid functionality not compatible with Mobile App</div> <table border="1"> <thead> <tr> <th></th> <th>a</th> <th>b</th> <th>c</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>2</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>3</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> </div>			a	b	c	1	<input type="text"/>	<input type="text"/>	<input type="text"/>	2	<input type="text"/>	<input type="text"/>	<input type="text"/>	3	<input type="text"/>	<input type="text"/>	<input type="text"/>
	a	b	c														
1	<input type="text"/>	<input type="text"/>	<input type="text"/>														
2	<input type="text"/>	<input type="text"/>	<input type="text"/>														
3	<input type="text"/>	<input type="text"/>	<input type="text"/>														

The textbox grid option will create a table with empty textbox to fill in.

The checkbox grid option will create a table with checkboxes to select and multiple options can be selected across the columns and rows.

Checkbox Grid			
	a	b	c
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please note: Grid functionality not compatible with Mobile App

\*The grid field type is currently not compatible with the Mobile App so if included in a form to be used on the app, the grid will be excluded from the form on the app view\*

## COMPLETION AIDS

### Comment - sub heading to provide the user with information

The comment field type can be used as a sub heading or a piece of information within the template by typing the text into the field name.

Comment - sub heading to provide the user with information	
Update Field	
Field Label	<input type="text" value="Comment - sub heading to provide the user with info"/> <input type="button" value="Show"/>
Section	<input type="text" value="Section 1"/> <input type="button" value="v"/>
Field Type	<input type="text" value="Comment - sub heading to"/> <input type="button" value="v"/>

### Internal Field Reference – display value of another field within the form

This field option allows you to select another field within the template to display the latest value of what was input into that field.

Internal Field Reference	
Section 1 - Numeric - (Current)	
Update Field	
Field Label	<input type="text" value="Internal Field Reference"/> <input type="button" value="Show"/>
Section	<input type="text" value="Section 1"/> <input type="button" value="v"/>
Field Type	<input type="text" value="Internal Field Reference -"/> <input type="button" value="v"/>
Reference Field	<input type="text" value="Section 1 - Numeric"/> <input type="button" value="v"/>

## PREPOPULATED OPTIONS

*There are multiple different prepopulated options of dropdown fields for countries, products, suppliers etc.*

The 'Update Field' dialog box is shown with the following fields and options:

- Field Label:** Prepopulated Options - Countries (with a 'Show' button)
- Section:** Section 1 (dropdown)
- Field Type:** Countries (dropdown)
- Help Text:** (empty)
- Help Image:** (empty)
- Required:** (checkbox with an information icon)
- Visible:** (checkbox with an information icon)
- Show in Completed Table:** (checkbox with an information icon, currently set to 'No')

A dropdown menu for 'Prepopulated Options' is open, showing the following list:

- Countries
- Site Employees
- Site Suppliers
- Site Products - All
- Site Products - Meat & Poultry
- Site Products - Packaging
- Site Products - Ingredients
- Site Products - Finished Product

At the bottom of the dialog are three buttons: 'Delete Field' (red), 'Cancel' (grey), and 'Update Field' (blue).

## PRESET FIELDS

*Preset fields are set up in the 'Admin' section of the tool, these fields can be set up once as a preset field and then used multiple times across tool templates to prevent the need to recreate the field.*

The 'Product Check Manager' Admin section is shown with the following details:

- Navigation:** Product Check Templates, Received Checks, Activity Overview, Reports, Admin (selected)
- Section:** Preset Fields (Add/Manage preset fields which can be used when creating/editing a Product Intake check)
- Category:** Uncategorized (Add New Preset Field, Manage Categories)
- Field Details:**
  - Internal Description:** Business Unit
  - Default Label:** Business Unit
  - Field Type:** Standard Dropdown - Single selection from custom options
  - Options:** 2 Options [Show...]
  - Actions:** Edit, Delete

*The preset fields can be set up for various field types and the field categories can be managed by using the 'Manage Categories' option.*

**Add New Preset Field**

Internal Description

Default Label

Type: Dropdown - Single selection from

Category

Options

Cancel Add Field

Dropdown - Single selection from custom options

Dropdown with Quantity - single selection option with number

Checkbox - Multiple selection from custom options

Textbox Grid - Simple Grid populated with textboxes

Checkbox Grid - Simple Grid populated with checkboxes

Weighted Dropdown - weighted single selection option

Weighted Checkbox - weighted multiple selection option

Once you have set up your preset field in the 'Admin' section, it will be available to select in your template.

**Add New Field**

Field Label: Business Unit Show

Section: Section 1

Field Type: Business Unit

Help Text

Help Image

Required

Visible

Site Suppliers - Ingredients

Site Suppliers - Bakery

Site Suppliers - Seafood

Site Suppliers - Test

**Preset Fields: Business Unit**

Business Unit

Complaint Category

Complaint Type

Product Category

Q Preset Browser

Business Unit

--Please Select--

--Please Select--

Retail

## VIEW OF COMPLETED FIELDS ON DESKTOP

[illegible]

Yes/No - Single selection	Yes		
Yes/No with Comment	Yes - comment		
Linked Dropdown	Line 1		
Numeric Dropdown	1.5		
Standard Checkboxes	Department 1, Department 2		
Textboxes Grid			
	a	b	c
1	a1	b1	c1
2	a2	b2	c2
3	a3	b3	c3
Checkbox Grid			
	a	b	c
1			✓
2		✓	
3	✓		
Comment - sub heading to provide the user with information			
Internal Field Reference	2		
Prepopulated Options - Countries	United Kingdom		
Business Unit	Retail		