

TOOL OVERVIEW

FORM BUILDER



TOOL OVERVIEW – FORMBUILDER

TOOL SUMMARY

Our Form builder tool is a simple but smart tool that is used throughout the Foods Connected system to enable the creation of highly configurable data capture forms to your specific company requirements. By optimising the functionality within the form builder, you can collect standardised, accurate and concise data in a clear and simple format.

KEY FUNCTIONALITY

The table below highlights the main actions you will be able to undertake using this tool and describes how each functionality can be utilised within the system.

SECTIONS	SECTIONS/ SUB SECTIONS	Create Sections and Sub Sections to provide clear and manageable template layouts.
	VISIBLE SECTIONS	Add sections which only become visible when a trigger response is previously selected within a form. This removes the need for multiple or lengthy forms and creates a clear and concise format which enables focus to remain on the required information.
STANDARD FIELDS	TEXT	Add free text fields to forms when specific detail which cannot be pre-populated is required.
	NUMBERS	Add fields which are restricted to numerical characters only to ensure standardisation of completed forms. Numbers entered can be restricted within given min/max range if required to eliminate anomalies in data caused by erroneous data entered in forms. Pre-set units can be added to numeric fields or the required unit can be selected from a drop-down for fields where the units may vary.
	IMAGES/ FILES	Add fields to attach Images and documents to forms.

DATES & TIMES

DROPDOWNS

Add a Date and/or a time picker when a date and/or time is required to be entered within a form to ensure standardised formats are used in completion of forms.

Add fully customisable dropdown options within a form.

Using custom pre-populated drop-down fields will standardise and increase reportability on completed forms.

By adding a linked drop-down the options visible will be dependent on a response previously selected in a dropdown field to prevent incorrect data being entered in forms.

CHECK BOXES

Add fully customisable pre-populated checkbox options when more than one option is required.

Each custom pre-populated option can have a score allocated which will contribute to the overall form score when used in a form where scoring criteria has been set.

GRIDS

Add a grid with customisable headers for rows and columns for information required in tabular form.

COMPLETION AIDS

Add text to give guidance on how a field should be completed or additional guidelines of the detail required to be entered in a field.

Fields previously completed within a form can be visible if required to complete a field at a later stage in the form.

Completion Aids can decrease the time taken to complete forms and reduce errors.

PREPOPULATED FIELDS

Pre-populated fields are non-customisable dropdown fields created from company specific information such as site suppliers, site employees and site products.

Pre-populated fields are live data and ensure the options are always up to date.

HELP TEXT

Help text can be added to fields to provide additional information to ensure the field is completed correctly.

This text will appear when the help icon is selected on the Foods Connected app or when hovered over with the mouse on the web but will not appear on the completed form.

HELP IMAGE

Help images can be added to each standard field to provide additional information to ensure the field is completed correctly.

This image will appear when the help icon is selected on the Foods Connected app or when hovered over with the mouse on the web but will not appear on the completed form.

MANDATORY FIELDS

Fields can be marked as mandatory within a form.

If a mandatory field is left blank within a form it cannot be marked as complete or confirmed until it has been completed.

The fields which are required to be completed are highlighted to the user.

Fields can be made conditionally mandatory based on previous responses.

Mandatory fields ensure that all required information is included in forms and eliminates time lost chasing missing data.

PRE-SET FIELDS

Pre-set fields can be created in the admin section of tools which use the form builder functionality.

Pre-set fields can be created for drop-down and Check Box options which are used repeatedly throughout a form.

RE-ORDER

SECTIONS

Sections can be re-arranged after entering into a form template to create a clear and logical format. Rearranging sections provides a quick and simple way to move multiple fields within a form template.

FIELDS

Individual fields can be re-arranged after entering into a form template. By adding and reordering additional fields forms can be easily updated.

SCORING CRITERIA

FORM SCORING

Scoring criteria can be added to form templates to give an overall scored outcome for the response received. E.g. if certain options or chosen a form can be deemed as a Pass/Fail or RAG rating. Score descriptions and criteria are fully customisable to meet requirements.

SECTIONAL SCORING

Scoring criteria can be added to sections within a form template and outcome will be generated based on chosen responses. Sectional score descriptions and criteria are fully customisable and can be used to provide a breakdown of outcomes within a form.

EMAIL TRIGGERS

Email triggers can be created meaning that users can be notified instantly when a form is submitted that meets their predefined trigger criteria. Email triggers ensure a clear line of communication throughout the company and can be used to highlight responses with require follow up actions

EXTERNAL FIELDS

External fields pull live completed data from other tools in the Foods Connected system.

The use of external fields ensures data is accurate, eliminates duplication of work and means it can allow for automation of forms to be completed.