

Other Features


**Other Features**


**Form Management**

# Add, Edit, Delete Forms

**Step 1** Click on Forms  Forms

Click on  to add new form.

Click on the form you want to edit and click on  that appears to edit the form.

Click on the form you want to delete and click on  at the top of the page to delete the form.

## Drag and drop to arrange form order

**Step 1** Drag and drop the form to arrange the order of the forms to display in home page.

Select	Form Order	Icon	Form Name	Form Type	Access Level	Automation History	Custom UI	Form Column	Filter Field Name	Parent Form	Ask delete reason	Make chart	Date Created	Group name
<input checked="" type="checkbox"/>	1		newForm	form	public_access	<input type="checkbox"/>	<input type="checkbox"/>	Single Column				None	2023-05-18 16:38:28	Workspace
<input type="checkbox"/>	2		Customer	filter	public_access	<input type="checkbox"/>	<input type="checkbox"/>	Single Column	Name			None	2023-05-18 16:15:57	Workspace
<input type="checkbox"/>	3		Chat Room Demonstration	form	public_access	<input type="checkbox"/>	<input type="checkbox"/>	Single Column		Single Column		None	2023-05-18 13:08:22	Workspace
<input type="checkbox"/>	4		Product Description	subform	public_access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Single Column		Catalogue		None	2023-05-17 09:53:37	Workspace
<input type="checkbox"/>	5		Catalogue	form	public_access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Single Column				None	2023-05-17 09:52:32	Workspace
<input type="checkbox"/>	6		RO	form	public_access	<input type="checkbox"/>	<input type="checkbox"/>	Single Column				None	2023-05-16 11:16:11	Workspace

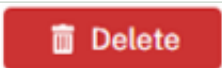
## Data Management

### Add, Edit, Delete Data



**Step 1** Click on any Form.

Click on  to add new data.

Click on  in the row of the data to edit the data.

Click on  at the top after selecting the record to delete the data.

### Export Data

**Step 1** Click on any Form. Click on  beside the print icon () to export data. (Exported file will be in CSV file format.)

## User Management

## Add, Edit, Delete User

**Step 1** Click on User List  Users .

Click on  to add new user.


Click on  on the user profile to edit the user.


Click on  on the user profile to delete the user.

## Add, Edit, Delete Group

**Step 1** Click on User List  Users .

Click on  to enter the Permissions Group page.

Click on  to add new group.

Tick the group you want to edit and click on  to edit the group.

Tick the groups you want to delete and click on  to

delete the group.

## **Form access rights**

### **1. Group with only read permission**

Create a Permission Group that only have Forms accessibility  
(Example: Permission Group Name: Read Access)

### **2. User with only read permission**

Step 2 Edit the user in User List, select the Permission Group that is read only access (For this case is the Read Access Group.)

**Assigned Groups**

Read Access

**3. The following details are examples that can be created in the Group Permission**

– Add/Create access only

**Admin Permission**

Select to allow [Select All](#) [Clear All](#)

Forms	<input type="checkbox"/> View Manage Form	<input checked="" type="checkbox"/> Create Form
	<input type="checkbox"/> Edit Form Settings	<input type="checkbox"/> Delete Form
Fields	<input type="checkbox"/> View Manage Field	<input checked="" type="checkbox"/> Create Field
	<input type="checkbox"/> Edit Field	<input type="checkbox"/> Delete Field
Users	<input type="checkbox"/> View Manage Users	<input checked="" type="checkbox"/> Create User
	<input type="checkbox"/> Edit User	<input type="checkbox"/> Delete User
Permission Group	<input checked="" type="checkbox"/> View Permission Group Page	
Settings	<input type="checkbox"/> View Manage Settings	

**User Permission**

Select to allow [Select All](#) [Clear All](#)

Records	<input type="checkbox"/> View History	<input checked="" type="checkbox"/> Create Record
	<input type="checkbox"/> Edit Record	<input type="checkbox"/> Delete Record

– Modify access only

**Admin Permission**

Select to allow [Select All](#) [Clear All](#)

Forms	<input type="checkbox"/> View Manage Form	<input checked="" type="checkbox"/> Create Form
	<input checked="" type="checkbox"/> Edit Form Settings	<input checked="" type="checkbox"/> Delete Form
Fields	<input type="checkbox"/> View Manage Field	<input checked="" type="checkbox"/> Create Field
	<input checked="" type="checkbox"/> Edit Field	<input checked="" type="checkbox"/> Delete Field
Users	<input type="checkbox"/> View Manage Users	<input checked="" type="checkbox"/> Create User
	<input checked="" type="checkbox"/> Edit User	<input checked="" type="checkbox"/> Delete User
Permission Group	<input checked="" type="checkbox"/> View Permission Group Page	
Settings	<input type="checkbox"/> View Manage Settings	

**User Permission**

Select to allow [Select All](#) [Clear All](#)

Records	<input type="checkbox"/> View History	<input checked="" type="checkbox"/> Create Record
	<input checked="" type="checkbox"/> Edit Record	<input checked="" type="checkbox"/> Delete Record

– Full access



**Admin Permission**

Select to allow [Select All](#) [Clear All](#)

Forms	<input checked="" type="checkbox"/> View Manage Form	<input checked="" type="checkbox"/> Create Form
	<input checked="" type="checkbox"/> Edit Form Settings	<input checked="" type="checkbox"/> Delete Form
Fields	<input checked="" type="checkbox"/> View Manage Field	<input checked="" type="checkbox"/> Create Field
	<input checked="" type="checkbox"/> Edit Field	<input checked="" type="checkbox"/> Delete Field
Users	<input checked="" type="checkbox"/> View Manage Users	<input checked="" type="checkbox"/> Create User
	<input checked="" type="checkbox"/> Edit User	<input checked="" type="checkbox"/> Delete User
Permission Group	<input checked="" type="checkbox"/> View Permission Group Page	
Settings	<input checked="" type="checkbox"/> View Manage Settings	

**User Permission**

Select to allow [Select All](#) [Clear All](#)

Records	<input checked="" type="checkbox"/> View History	<input checked="" type="checkbox"/> Create Record
	<input checked="" type="checkbox"/> Edit Record	<input checked="" type="checkbox"/> Delete Record