

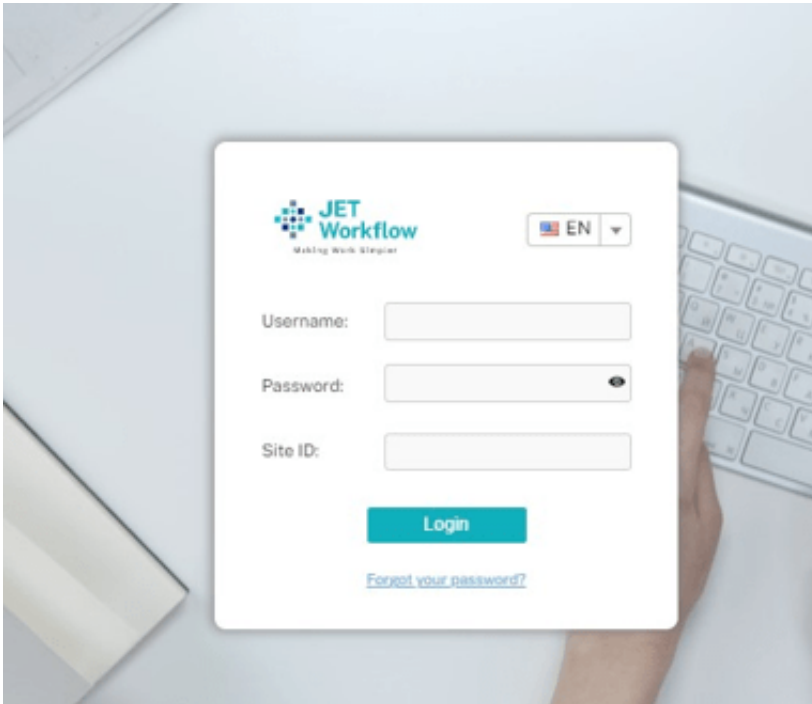
## Step-by-Step

### 1. Login

Login to JET doesn't require any software installation – you can login to JET with any internet browser

**Step 1:** Enter the URL address that was setup for your Jet Server to go into the Jet Login Page. In our example, we use our demo website <https://demo.jetworkflow.com>(<https://demo.jetworkflow.com>)

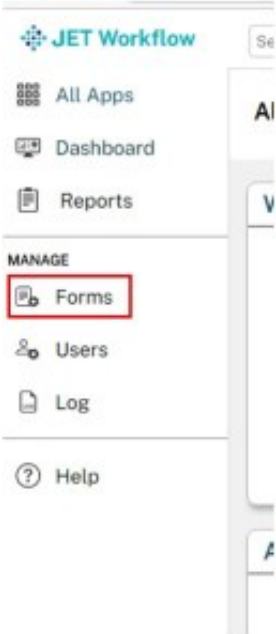
**Step 2:** Key in your login details.



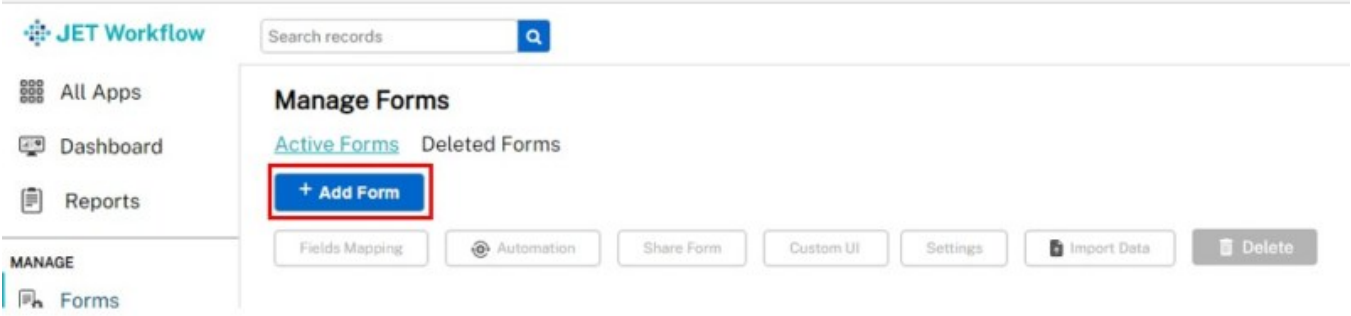
## 2. Add Form

Create a form, define the fields and it is ready to use immediately. Use drop-down list, calendar dates, and file-upload capability, ability to collect data and import it to any application for further processing.

**Step 1:** To create new forms, click on the Manage icon on the left side of the screen



**Step 2:** Click on Add Form.



**Step 3:** Form Details will pop up, fill in the field and click on Save.

**Form details**

**Basic Information**

Form Name

Form Type  
 Form  
 Filter  
 Sub Form  
 URL Link

App Name

View Form Records in  
 Single Column  
 2 Column (Vertical)  
 2 Column (Horizontal)

Form Icon  OR  No file chosen

Form Description

**Form Permissions** Assign Permission Groups to [allow viewing of this Form](#)

Edit([https://jetworkflow.com/wp-admin/admin.php?page=tablepress&action=edit&table\\_id=3](https://jetworkflow.com/wp-admin/admin.php?page=tablepress&action=edit&table_id=3))

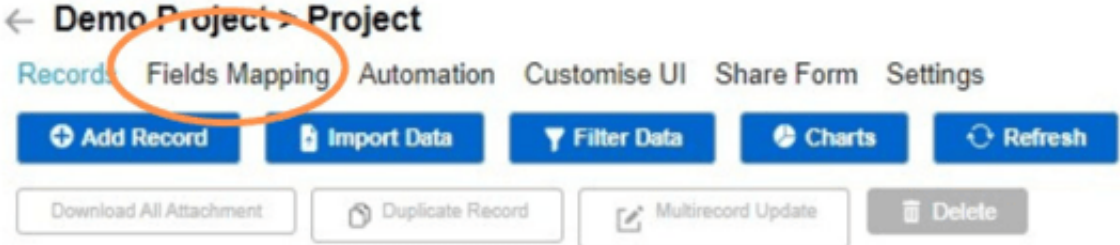
Forms Details	Description
Form Name	Name of the form
Form Type	Form: Default Form. Filter: Enables the Form to be displayed on the left navigation bar, and allows searches within individual Data entries. Sub Form: Supporting form to further expand records.
Filter Field Name	URL Link: Redirects to external link (Viewable only after selecting Filter) Name Display of the filter on left navigation bar

Forms Details	Description
Parent Form	(Viewable only after selecting Sub Form) Chooses the form that this sub form will be a part of
Form URL	(Viewable only after selecting URL Form) URL of the form
App name	Name of the group that this form belongs to
Column mode	Choices of <ol style="list-style-type: none"><li>1. Single Column</li><li>2. 2 Column (Vertical)</li><li>3. 2 Column (Horizontal)</li></ol>
Form Icon	Allows the user to customize the form icon by choosing from existing list or uploading their own icon
Form Description	This will serve as a description of what this form is about
Form Permissions	Selects the permission groups that would be allowed to see this form
Record Accessibility	Public Access: Everyone can see all the records in the form Owner Access: Only the submitter can see his own records. Owner Group Access: Only the users belonging to the permission group can see the record.

**Note:** You can change the form type which will reveal various field options described on the right.

## 2. Add Field.

Step 1: Once the Form is created, click on the form itself and then click on Field Mapping.



**Step 3:** Click on the Add Field button.



The image shows a 'Field Settings' dialog box with the following elements:

- Field Information**
  - Field Name \*: [input field]
  - Field Label \*: [input field]
  - Tips: [text area]
  - Field Order: [input field with value 3]
- Field Types**
  - Select a Field Type from the following lists:
  - [list box containing GENERAL]
- Buttons: Cancel, Save

**Step 3:** Field Details will be shown, fill in the field and click on Save.



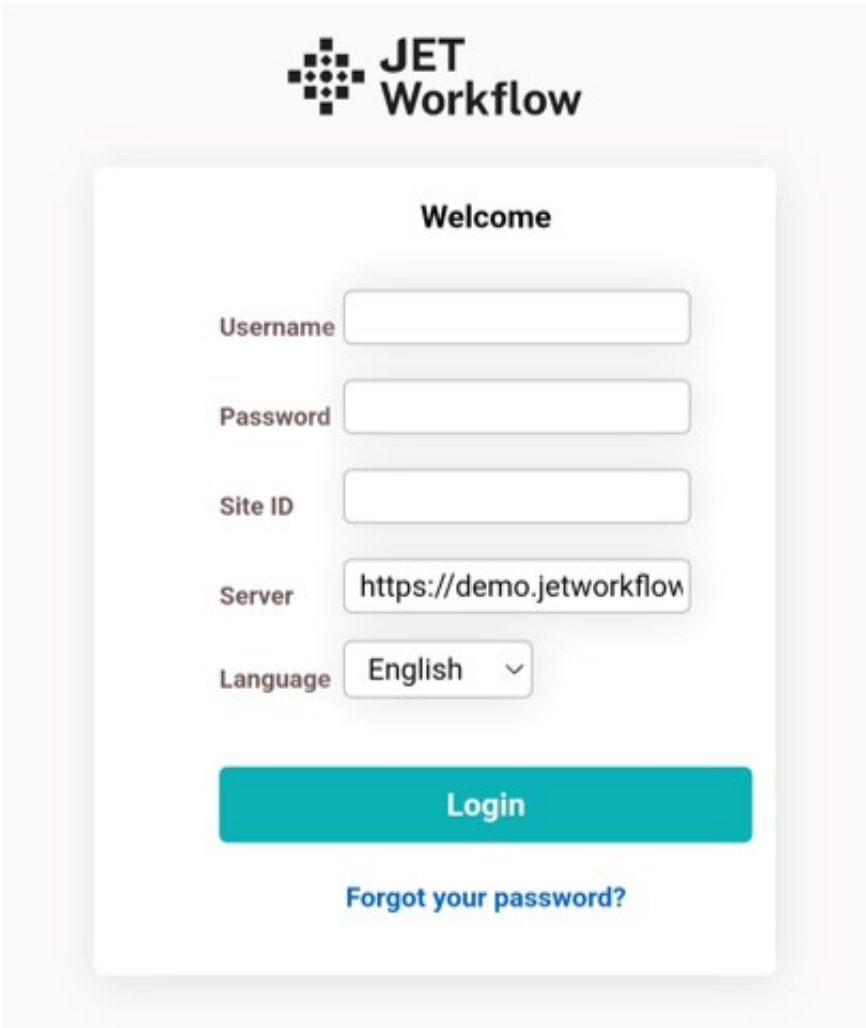
- I. Field Name: A name identifying the column in a database record.
- II. Field Label: A descriptive word or phrase for a field in a record, such as 'surname', 'postcode', etc.
- III. Tips: This will show a description of what this field does.
- IV. Field Order: Determines the order in which the field will appear in the form.
- V. Field Types: Each field type has each use. (The table on the left is to show the description of each field type)
- VI. Required: Check the checkbox for requirement of input for the field.
- VII. Read Only: Check the checkbox to make this field read only.
- VIII. Allow Multiedit: Allows user to edit the same field on multiple records at once.
- IX. Unique Value: Check the checkbox to ensure the values are unique within the records.
- X. Allow Duplicate Value: Check the checkbox to give you the option to keep the value even if the value is not unique, but VIII must be checked.
- XI. Field Masking: Depicts a format the user has to follow to input value (for text field type only)
- XII. Min Length: The minimum amount of characters to put in the field.
- XIII. Max Length: The maximum amount of characters to put in the field.
- XI. Field Permissions: Choose the permission group that is allowed to access this field.

**NOTE:** You can drag the row of field name to arrange the order.

Please go to Field Types(<https://jetworkflow.com/documentation/field-types/>) to see the list of field types.

**Step 4:** Go back to the main page, you will see the form that you created. Click the new form created. (Can click on the Back button until you reach the home page.)

#### **4. Login to mobile app.**



**Step 1:** On the JET app, and login with the same account details.

**Step 2:** The forms that you created on the website will be shown in the mobile app.

