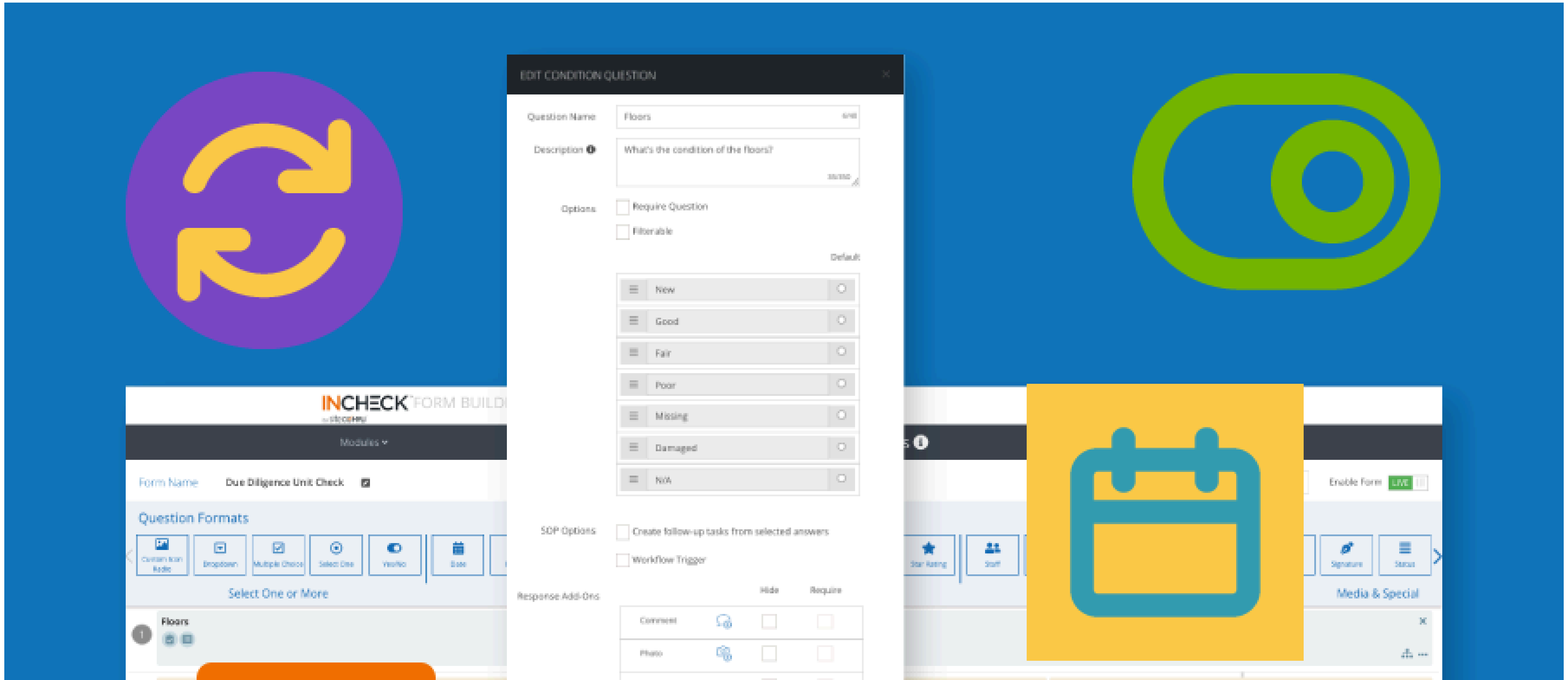
Your Guide To The InCheck Form Builder



What is the InCheck Form Builder?

The InCheck Form Builder **gives you the power to create, modify, adjust, or remove any forms** used by your team on the InCheck Mobile App or in the InCheck Desktop.

You can find the Form Builder under **Settings > Company > Form Builder** (located at the top of the Company Settings option list towards the left of your screen), or at the bottom of your left side navigational tabs.

The Form Builder can only be accessed by InCheck Admins - ask your Customer Success Manager if you'd like to adjust any user's access on your team, or if you have any questions here.

In this guide, we'll review how to create and change existing forms. You can also check out the InCheck Best Practices Video Hub for quick reviews and detailed walkthroughs.

Understanding Form Organization

Before we create a Form, it's helpful to know how they're organized:

Solutions

InCheck has four core Solution types: Inspections, Documents, Incidents, and Maintenance.

These types help organize how Forms are "filed" and stored in your InCheck account.

While different teams choose to organize in different ways, here's how we typically see teams select any given Solution to create a Form for:

Inspections: Unit and Property checks
Maintenance: Routine work
Documents: Files and records
Incidents: Issues and events

Categories

Categories add another layer of specificity to Solutions.

These can be thought of as folders within each Solution - they'll be organized as an individual list-view page in your account, and all Forms related to a Category will contain the same system-level settings. *These settings cannot be changed or edited.*

Here are some example Categories for each Solution:

Unit Inspections, Property Inspections
Pest Maintenance, HVAC Maintenance
Vendor Insurance, Equipment Warranties
Onsite Injuries, Weather Incidents

Forms

Forms are the actual inspection templates, checklists, and question formats that your team will fill out in the field or at their desk. These are what you're creating and editing in the Form Builder.

Here are some example Forms:

Move-In Inspection, Monthly Property Walk
Spring Pest Treatment, Heat Pump Check
Vendor Liability Insurance, Rangetop Warranties
Slip-and-Falls, Flooding Incident

Putting It All Together

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Here's how Solutions, Categories, and Forms are related to each other:

Solution	Category	Form
Inspections	Unit Inspections	Move-In Inspections
Inspections	Property Inspections	Monthly Property Walks
Maintenance	Pest Maintenance	Spring Pest Routine
Maintenance	HVAC Maintenance	Heat Pump Checks
Documents	Vendor Documents	Liability Insurance
Documents	Equipment Documents	Warranties
Incidents	Onsite Incidents	Slip-and-Falls
Incidents	Building Incidents	Weather-Related Flooding

When you start to build something, it's good to think about where you'd like your individual Form records stored, and how you'd like information to be organized and filed →

Putting It All Together

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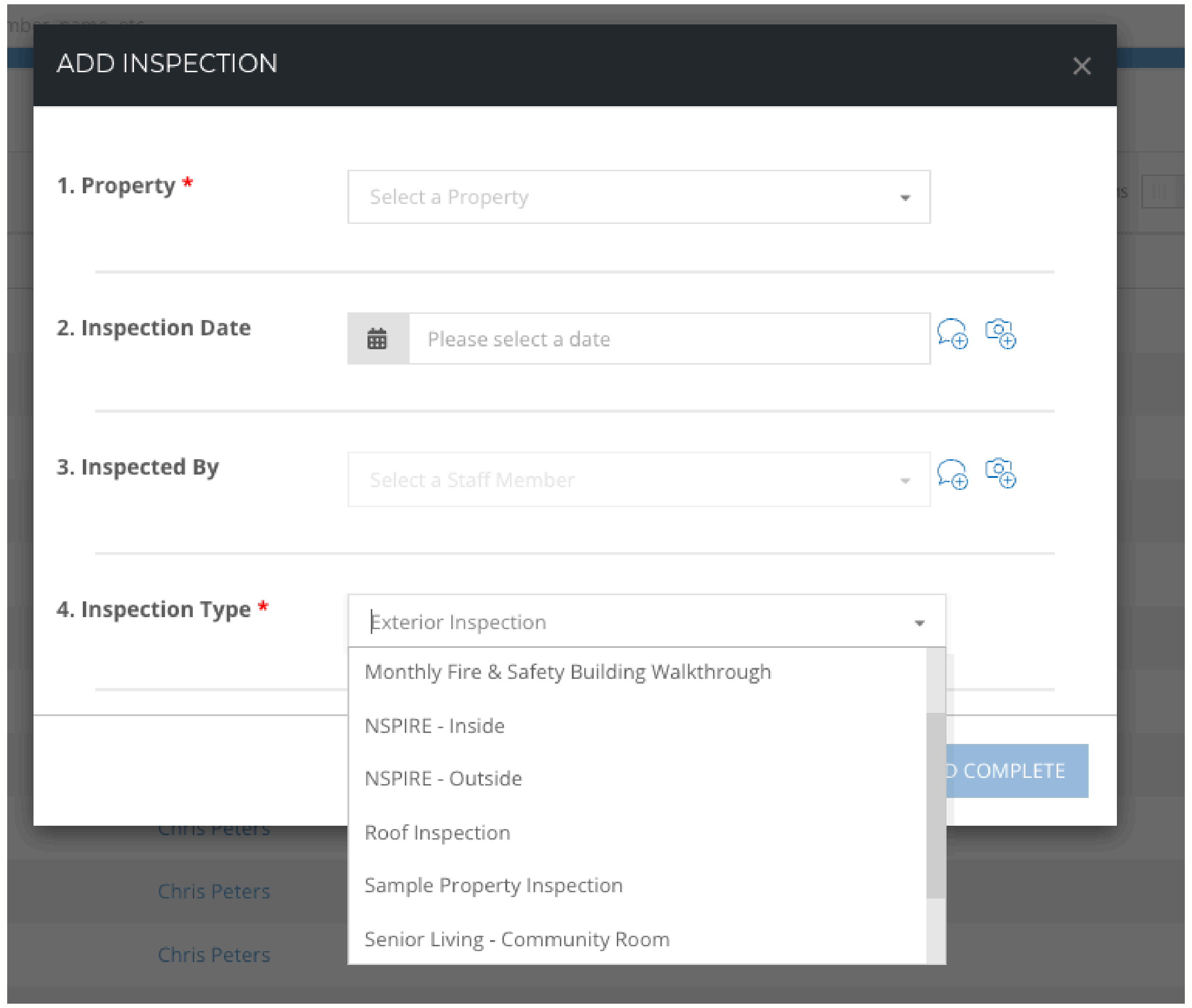
Here's how Solutions, Categories, and Forms look in your account:

Solution

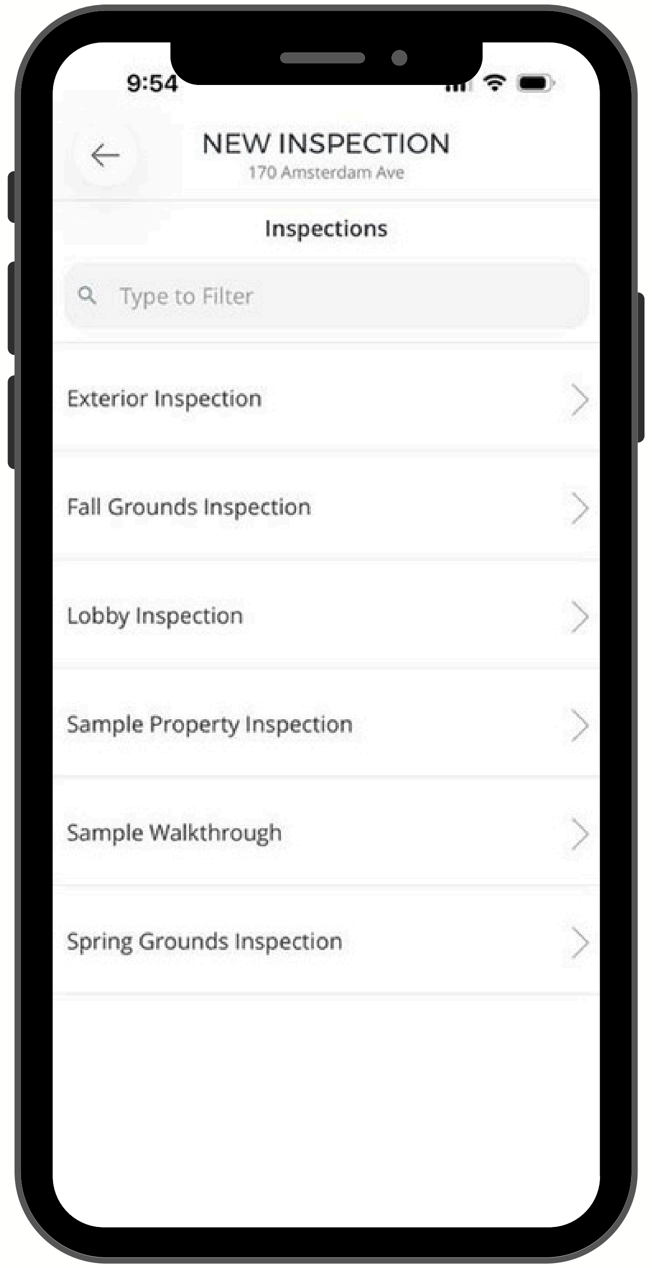
Categories

How records are organized by Solution, and then Category in your Desktop



Forms

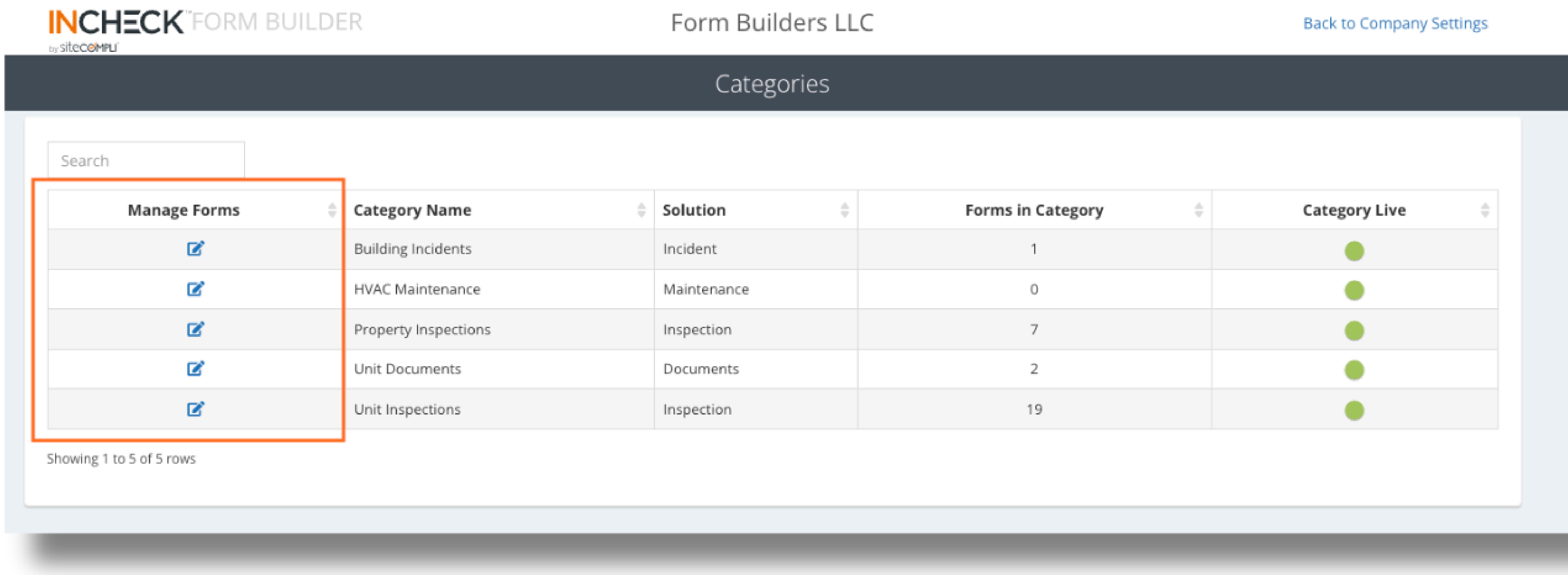
Where specific Forms within a Category can be selected on the Desktop



Where specific Forms can be selected within a Category in the Mobile App

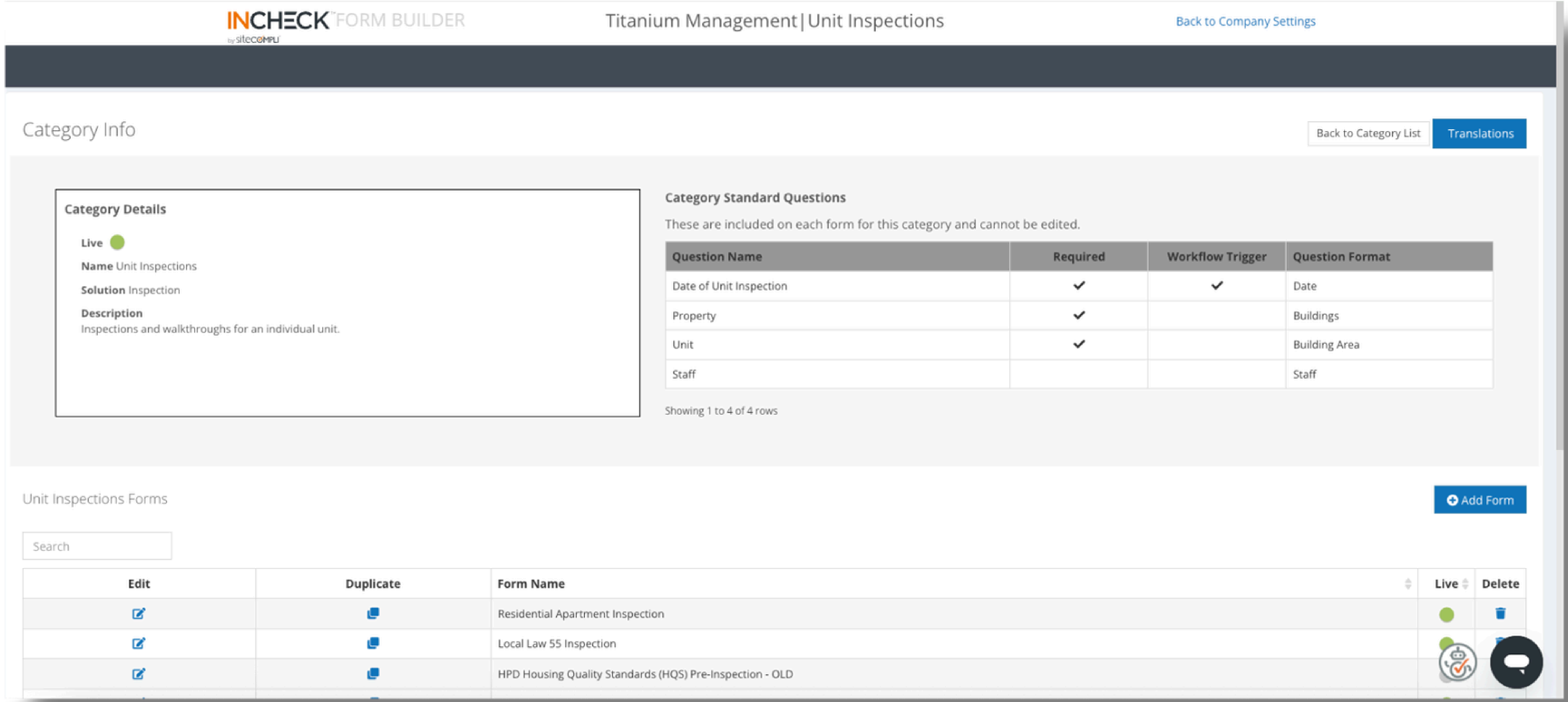
Accessing The Form Builder

Once you've logged into the Form Builder, you can edit any Forms within a given Category by clicking on its respective Edit button - highlighted here:



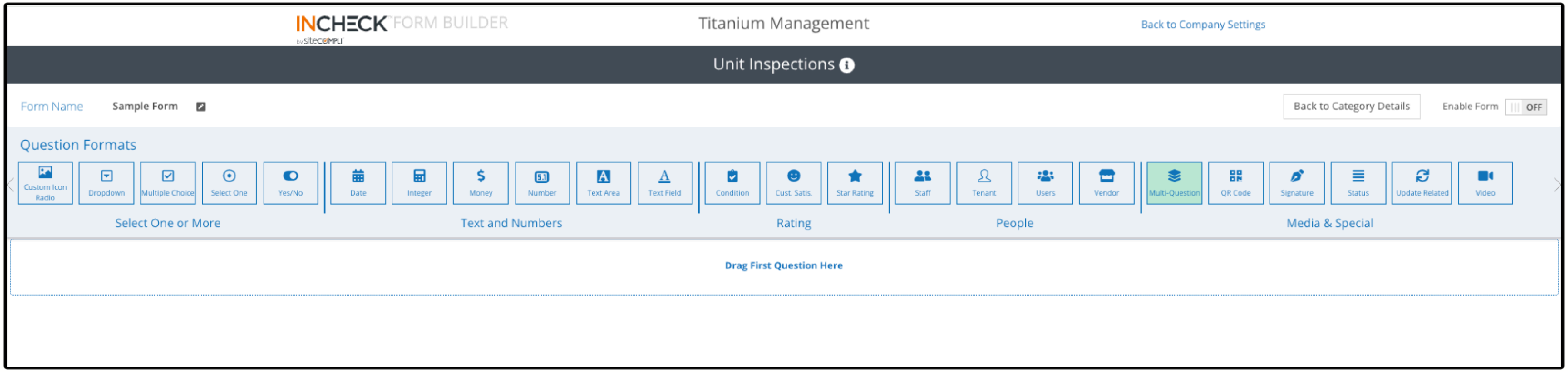
Accessing The Form Builder

On the Category page, you'll see which Forms are **Live** (green) or **Disabled** (gray), and be able to **edit**, **duplicate**, or **delete** existing forms. You can also create a new Form by clicking **Add Form**.



Viewing The Form Builder

Here’s what you’ll see when you create a new Form, or edit an existing one:



Shown above are all the available Question Formats for any given Form, organized into similar groupings. Adding any question to your Form is as simple as clicking on the Question Format box and dragging it down into your Form Builder. Once you’ve selected a Question Format and dropped it into the Builder, you’ll be able to edit details for that specific question/input.

The final step for ensuring your team can use this Form is to turn it on, by clicking the **Enable Form** toggle in the upper right hand corner.

Important Reminder

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When you delete a question from an existing form, it will permanently delete that question AND any saved answers from completed forms.

If you do want to remove a question, field, or response option, we recommend the below safe editing process:

1. **Duplicate the form first** - this preserves all historical data from your original form
2. **Make your desired changes** to the duplicate version
3. **Activate the new version** with your changes
4. **Deactivate the old version -** ***do not delete it.*** Deactivating will let you keep and view historical data.

Safe Changes - No Duplication Necessary	**Risky Changes - Follow Above Steps**
Adding new questions (doesn't impact old data) Editing question text or description text Adding new answer options Changing required/optional settings Adding info pop-ups	Deleting questions Removing answer options Changing question formats

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Question Formats

The Form Builder features several Question Formats, ensuring your team captures the exact information you need for every Form you create.

Question Formats are organized in groups to help you identify what you're looking for. This includes "Select One Or More," where your team can choose one or several options depending on what they see. It also includes "Text and Numbers," which requires a specific input in order to be saved and stored.

You can also choose unique inputs, like videos, signature cards, fields that identify a specific individual, and more.

Want a deeper dive into each Question Format? Visit our Quick Reference Guide reviewing all options (linked here), or our deep dive video where you can see each Question Format in the Form Builder, alongside what it looks like in the Mobile App (linked here).

Please note - some questions will appear on your form that you didn't add. These are Category-level fields like Date of Inspection, Property, Unit, and Staff. These are automatically included and cannot be customized.

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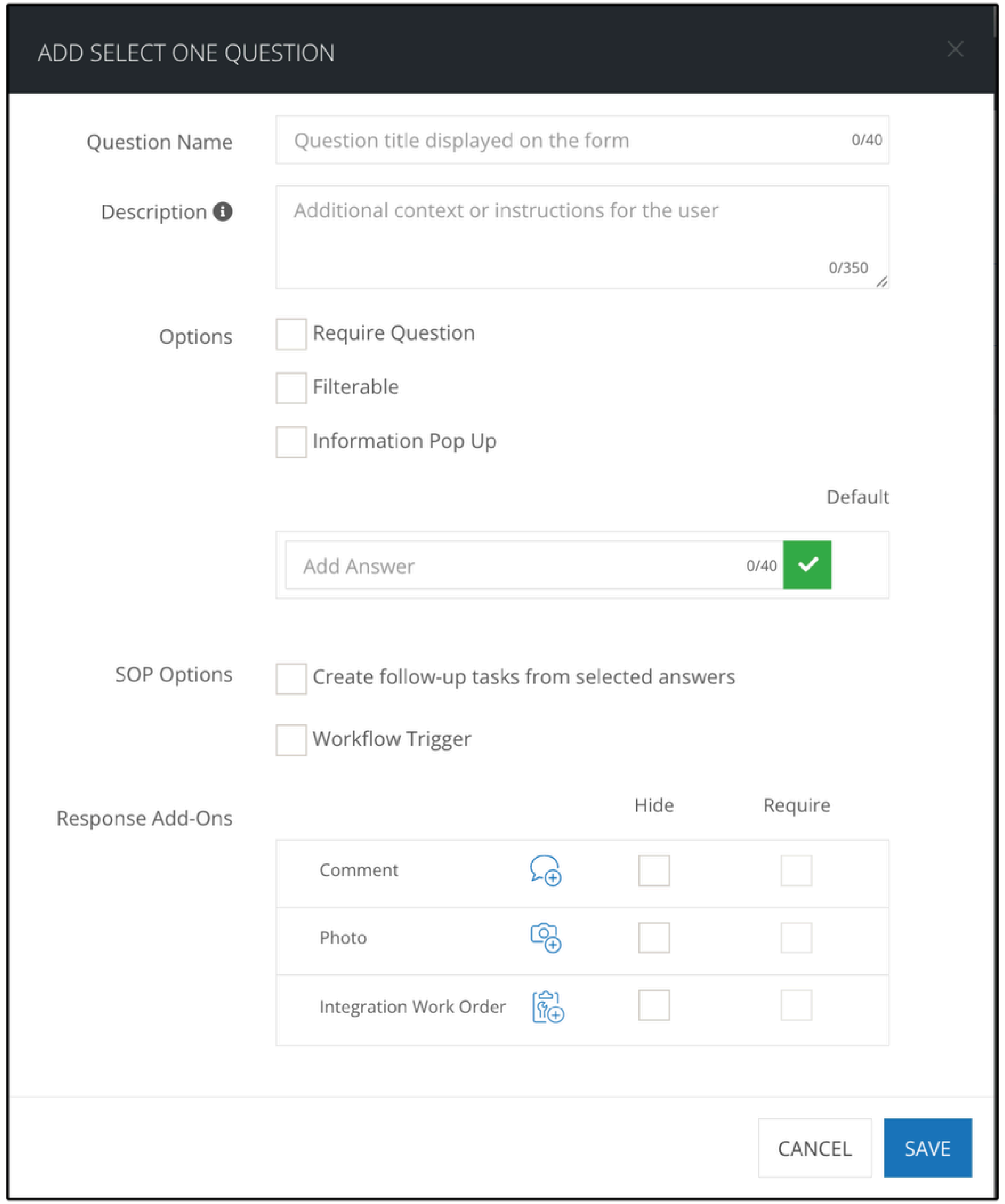
Question Options

This is the window that will open up when you add a specific question to your Form. There may be different options shown in the window based on the question.

On the next page, we'll go over what each option means.



Here's where you'll enter the specific question (Question Name) and an optional Description for brief details, context, or guidance.

Here's where you can check off individual options for this question (more details on the next page).

You can create specific response options here. This section does vary based on the Question Format.

Here is where you can choose how these responses can trigger any follow-up work, or SOPs. *This may require an additional step in your Desktop to complete automated work.*

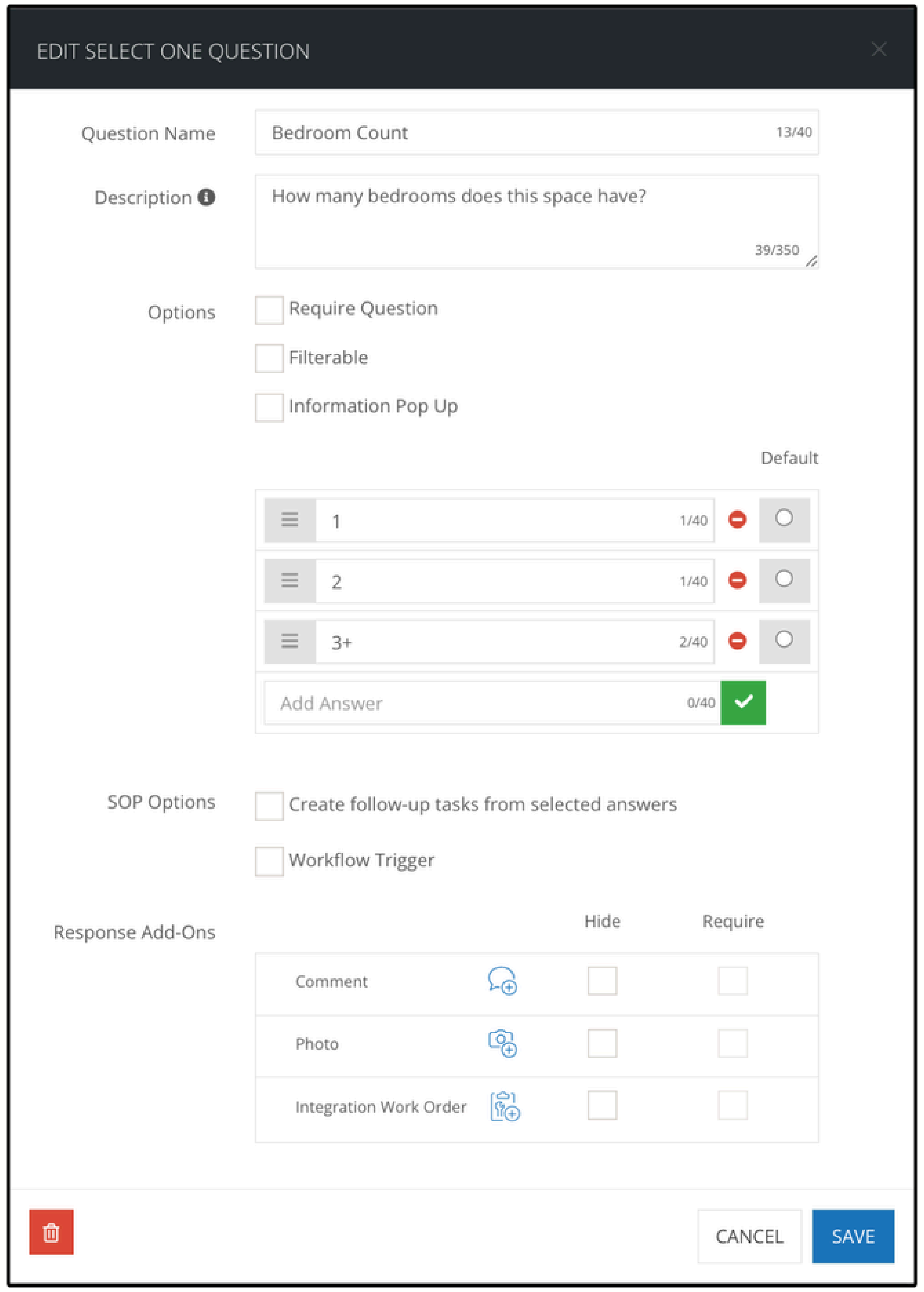
Finally, you'll have the option to require or hide the ability to add Comments, Photos/Video, or add the response to a Work Order.

Question Options

You can customize most Questions with the following options:

Field Name: This is the question that users see. Make it clear and specific for staff members in the field.	**Description**: This is brief, additional information located underneath the question. You can add information here for additional context or guidance.	**Answers**: Here's where you'll input any available options you'd like your team to choose from when completing the Form. You can select any answers as a Default value if you choose, which pre-selects that response & speeds up Forms where one answer is the most common.
Require Question: Selecting this option will require your staff to answer the question. Forms cannot be marked completed without responding to required questions. Required questions are identified in the app by a red asterisk.	**Filterable**: Selecting this option will allow you to filter list pages in your InCheck desktop view by specific responses (For example: Inspection Status as Pass/Fail).	**Information Pop-Up**: Selecting this option allows you to add additional information and context (including an embedded video, if you choose) to the specific question. We'll explore how to use this option later in the guide.
[SOP] Follow-Up Tasks: Select this option if you'd like specific responses to be added as an individual Task to a single follow-up Workflow (if selected when using the Form). Great for "punch list"-type work.	**[SOP] Workflow Trigger**: Select this option if you'd like a specific response or responses to trigger an entire Workflow.	**Response Add-Ons**: Require or remove add-ons like comments, photos and videos, and Work Orders from any individual question.

Question Output



Here's what a Question created in the Form Builder looks like in the Mobile App

Multi-Question Option

One type of Question Format is the "Multi-Question" - an option where you can have multiple inputs on a single screen in the Mobile App:

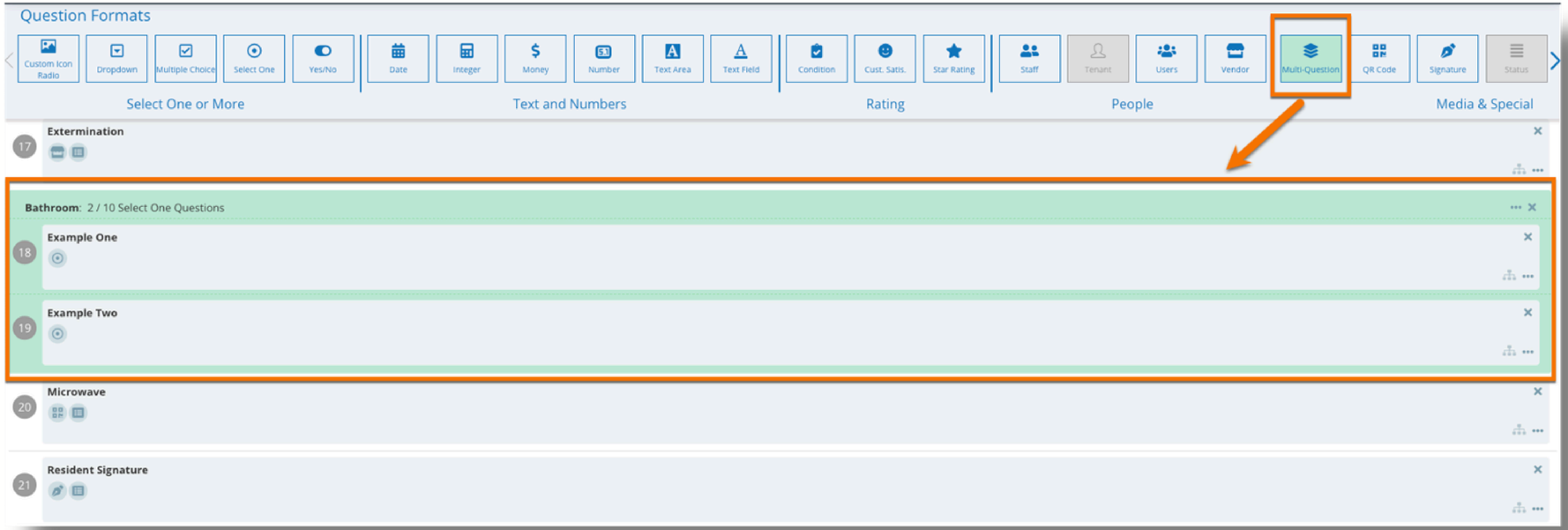
You can choose to have more than one "Select One" questions, or more than one "Multiple Choice" questions on the same screen. You can only choose one or the other - you can't mix Question Formats on a single screen.

First, create your series of questions. Drag-and-drop either Question Format like normal to create your questions.

Then, drag-and-drop the Multi-Question option (green box) into your Form. From there, you'll be able to drag all your questions (a maximum of ten per group) into the green box.

Multi-Question Option

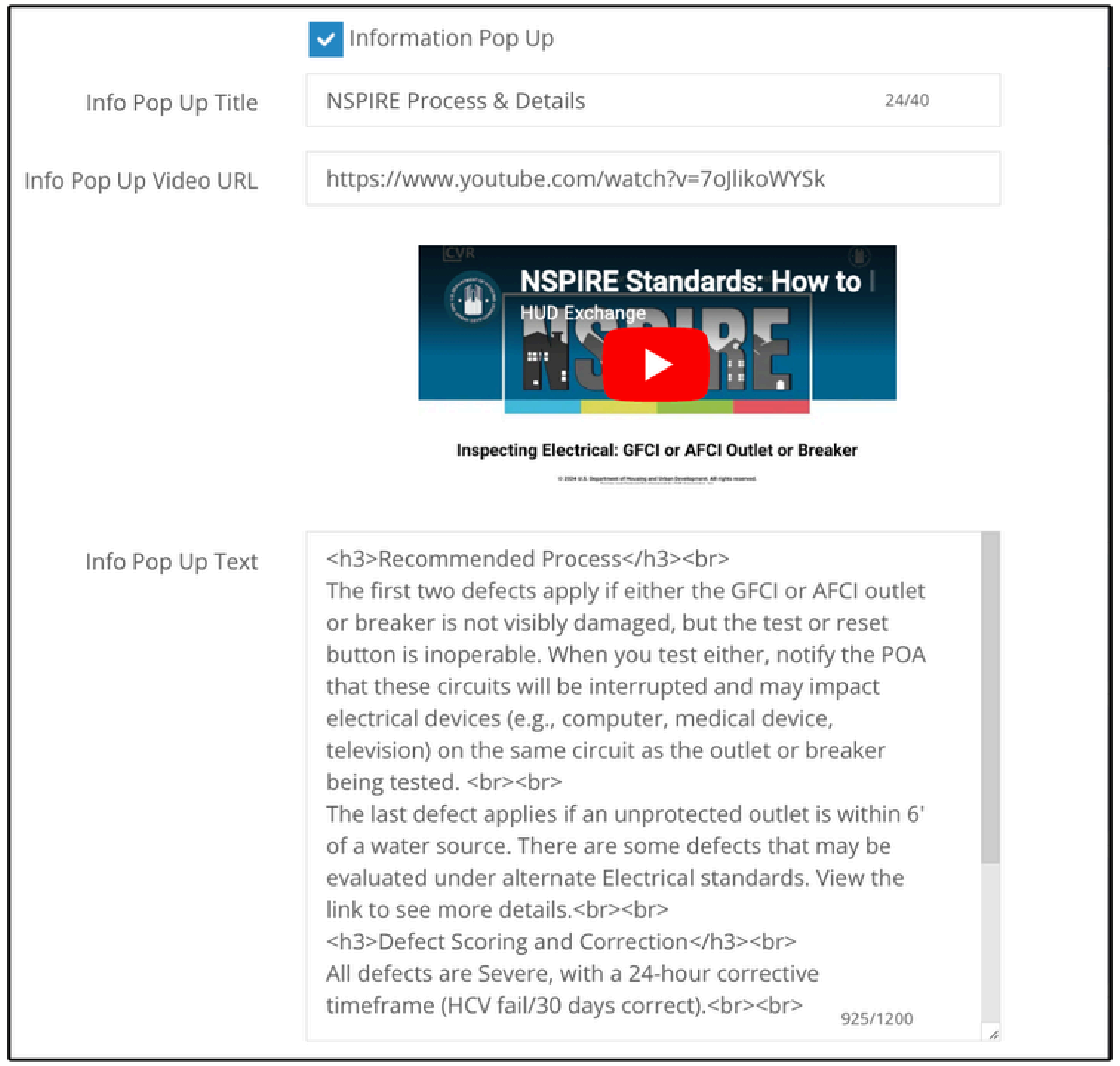
Here's how it looks in the Form Builder, and in the InCheck Mobile App:

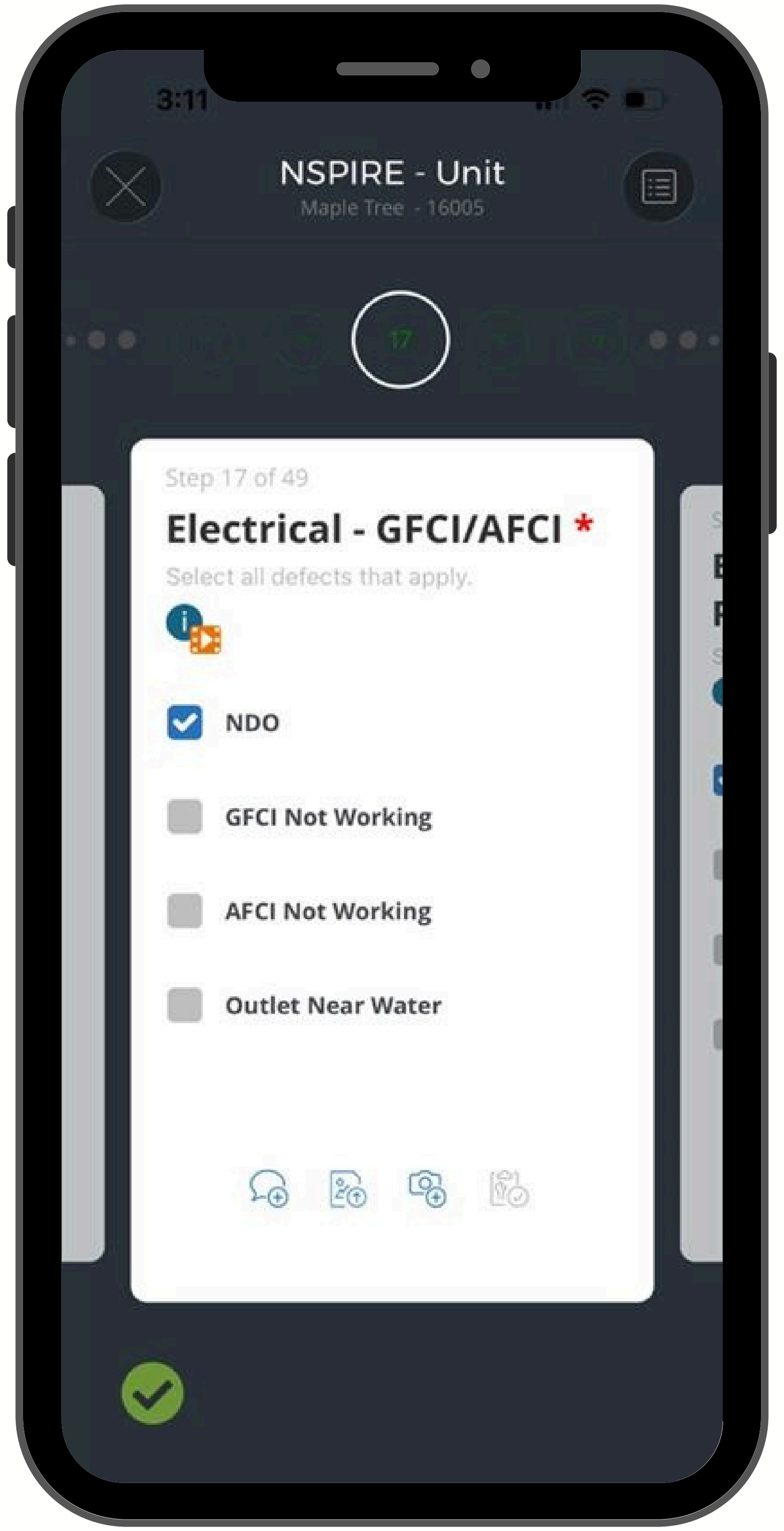


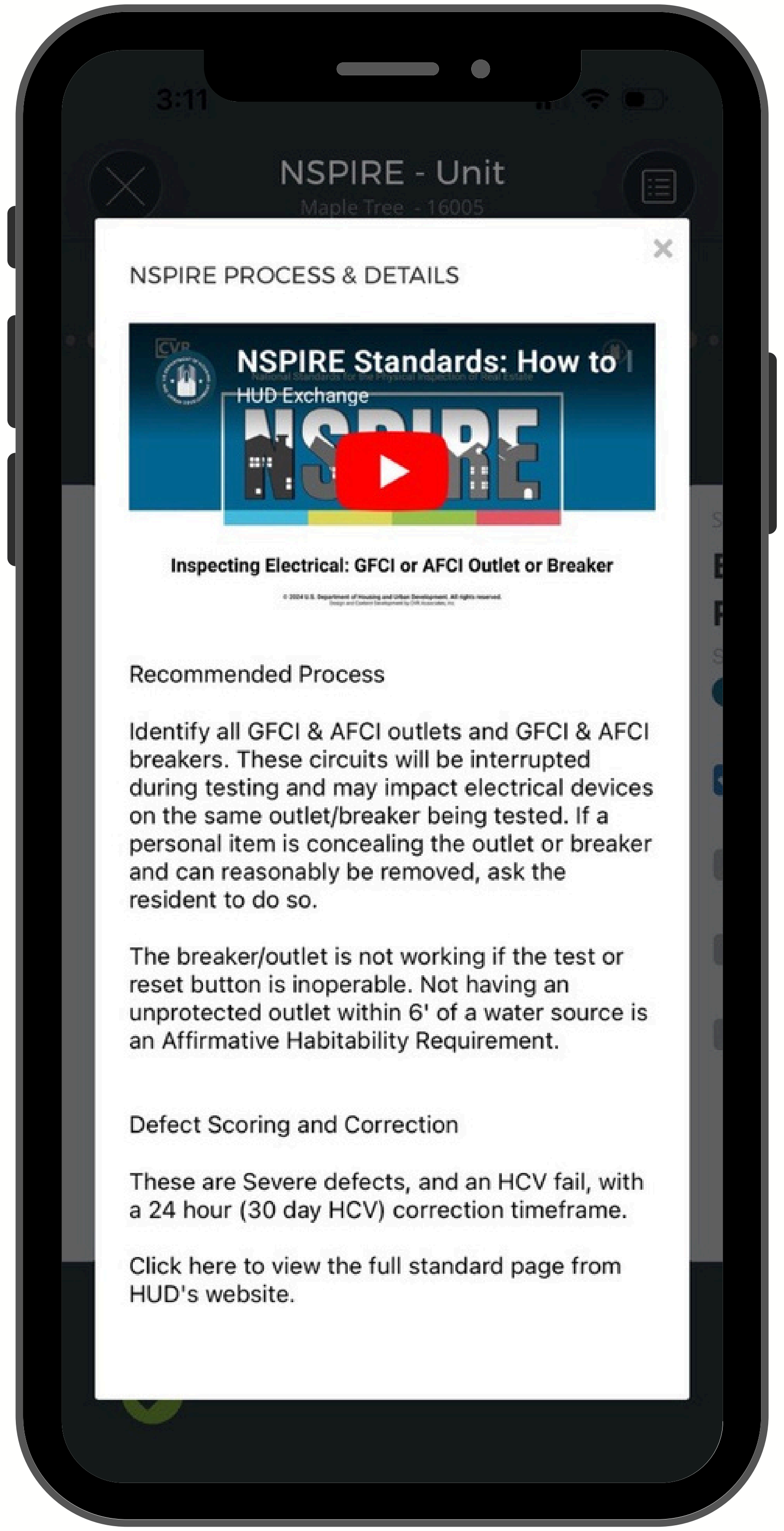
Info Pop-Ups

Selecting “Information Pop Up” will expand the question window and let you add text with simple markup and an optional YouTube or Vimeo link.

Users on the InCheck Mobile app will see an Information icon that they can click to reference the pop-up information - all without leaving the Form!







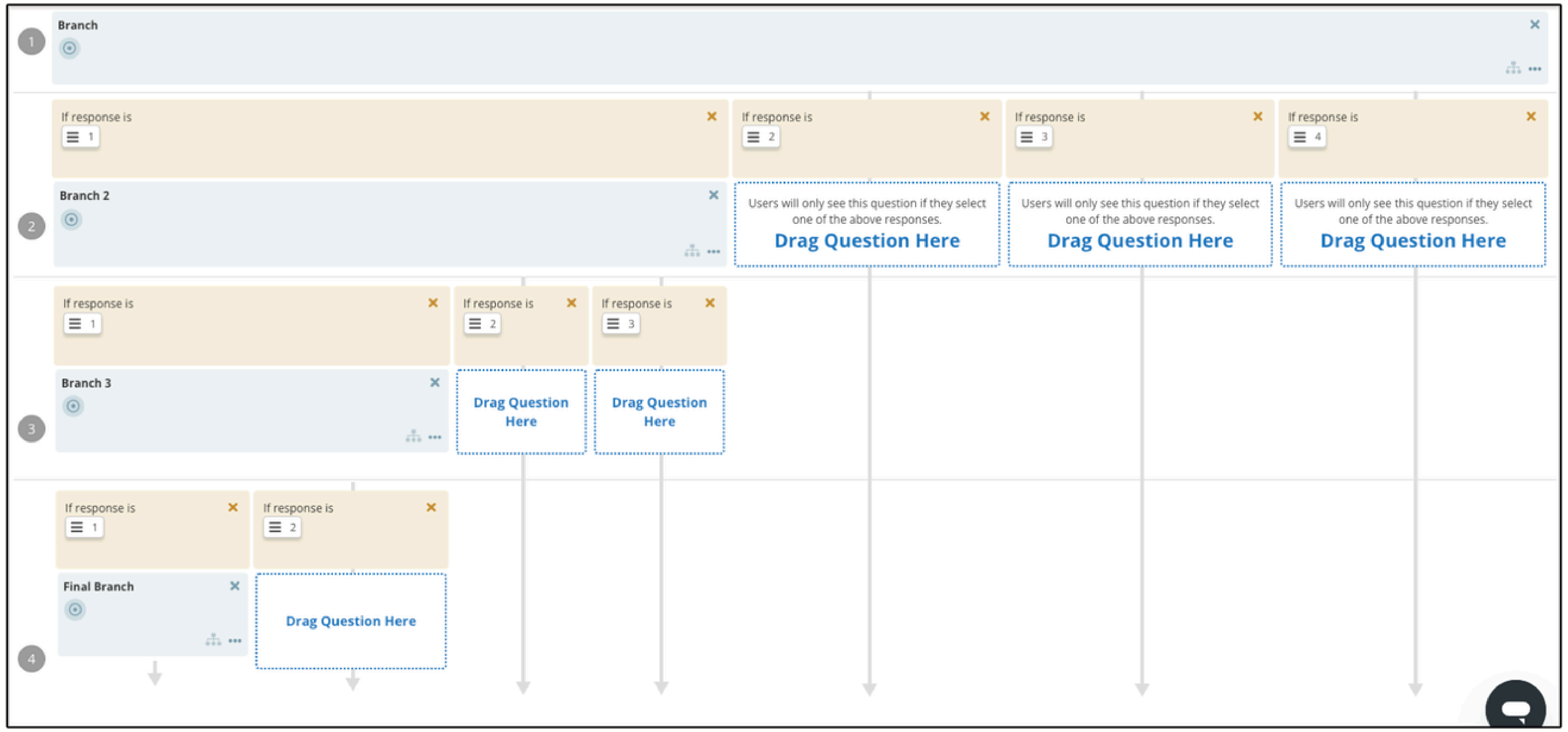
Branching

Branching questions based on your team's responses lets them focus on what's happening - and not get distracted by unnecessary questions.

To set up branching, click on the branch icon when hovering over the question you'd like to branch from:

- You can branch up to 4 paths across. To add additional branches, click the branch icon again. This means you can have 4 different outcomes from one question
- You can branch up to 3 times when going down one path
- You can have multiple answers on a branch

Here's what 4 branches across and 3 branches down looks like:



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Quick Tips

Start Simple! Build a basic form first, test it on your InCheck Mobile App, then add complexity like Branching and Multi-Questions.

Test On Mobile Early. What looks good on desktop might be hard to use on a phone - check both platforms.

Use Descriptive Names. Field Staff might be filling out 10 forms a day - make questions crystal clear.

Leverage Information Pop-Ups. Instead of long descriptions, use pop-ups for training materials and reference docs.

Common Issues & Solutions

I saved my form, but I can't find it! Check the Category it's assigned to - Forms are organized under Categories. Ensure the form is enabled inside the Form Builder by toggling it to ON. You'll see green instead of gray in the upper right hand corner of the Form.

My question order is wrong. Click and drag the 3-line grip icon to reorder questions.

Multi-Question cards look weird on Mobile. We recommend reducing answer options to 3-4 maximum for better display on the Mobile App.

I'd like to test changes without impacting the live form my team is using. Duplicate the form, make changes to your copy, test, and swap them (activate one, deactivate the other) whenever you're ready!

How do I test a form in Mobile? Log into your InCheck Mobile App (using the same credentials as your Desktop) and use the blue button (+) to manually select and fill out a record of your chosen form.

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