MANUAL FOR THE TEMPLATE CONFIGURATOR.

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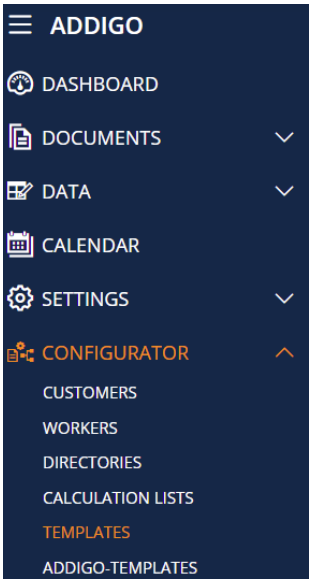
1. First steps

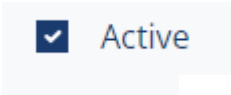
Go to the icon on the left above and select in “Configurator” tab “Templates”.



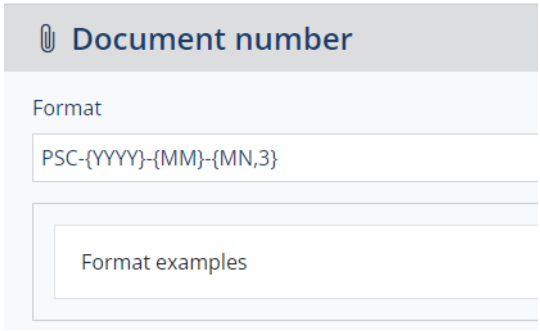
Select the option on the left „Create new template”.

Choose a name for the form, e.g. “Object safety check” and give the correct plural form on, here then “Property safety checks”. This step cannot be skipped.

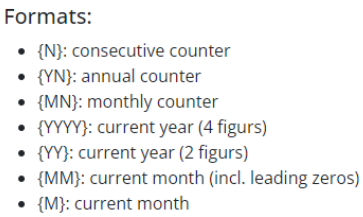
Insofar as you want to make
this form visible,
put a check mark in the
“Active” checkbox.



Choose the format of the
Document number:

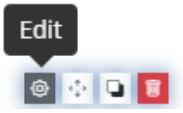


- Click on
  Format examples and
  choose the one for yourself
  matching letters, formats
  and meter points,
  which you enter under
  “Format”.



- Example: PSC-{YYYY}-{MM}-{MN,3}
  - Explanation: PSC stands for “Object Security Check”, which appears with {YYYY}
  The current year appears in the document number, and the current month appears in the document number using {MM}. {MN,3} ensures that the documents
  are counted with a total of three digits in the current month, i.e. 001, 002, 003, etc.
  - The format template OSP-{YYYY}-{MM}-{MN,3} is created for the first template
  of the month of April in 2024 the number PSC-2024-04-001.

The “title” of the
Template components
you can change according to your
needs. For that
go just above the
right part of the
Component field on the
small gear for
“Edit” and select
then a new
Designation. Then you can
save.



Note: The title field is a "Text (short)" template component and accordingly has many other functions, which are presented below. The "Execution date" field corresponds to the main component "Date / time", which is also discussed below.

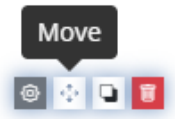
The title field and the execution date are marked as mandatory fields in new templates. You can change this as required under "Validation". You can also create additional mandatory fields later under this tab. (You can find out more about "Mandatory fields" on the following pages).

Make sure you always save all changes in your template so that they are not lost when you exit the configurator!

2. Basic functions

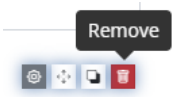
2.1 Move, copy, paste

If you want to use a component, simply drag and and drop it to the desired position on the form. You can move it again at any time later.



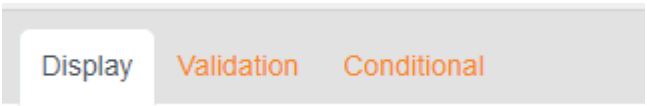
If you want to duplicate a component, click on the "Copy" button.

The component is just as easy to remove again, of course.



2.2 Display, validation and dependencies

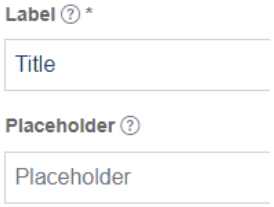
In each main component you will find at least the three areas "Display", "Validation" and "Dependencies"; in each layout component at least "Dependencies".



Depending on the main component type, there is also the "Data" area.
The default value can be set here. If the "Display" function is more complex in some main components, you will find an explanation of this in the respective component in the manual.

2.2.1 Display

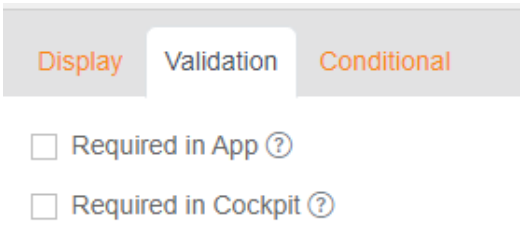
Almost every component must be labelled with a name.



2.2.2 Validation

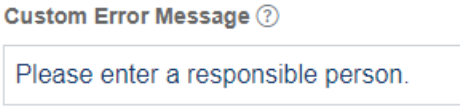
At this point you can decide whether a field should be a mandatory field.

Important note: Mandatory fields are fields that you as admin or your app users must fill in before you can save/submit a form. It is therefore advisable to use mandatory fields sparingly.

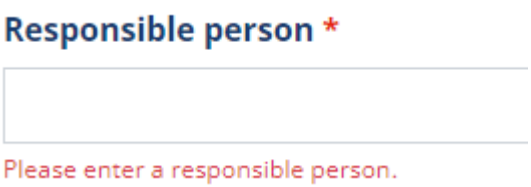


It is marked accordingly in the finished form with a red asterisk.

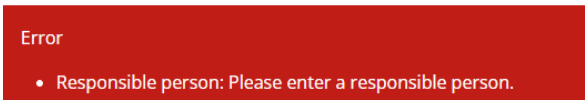
You can also specify an error message.



Labelling this field as mandatory means that in the event of an incorrect or missing entry, the required note will be displayed directly below the field:



In addition, at the top of the form the specified error message also appears.

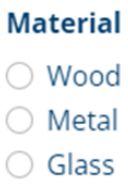


2.2.3 Dependencies

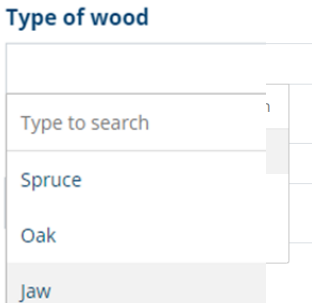
At this point, you can decide whether a certain component should appear at all in the created form, depending on values or data in other components in the same form.

Here a simple example:

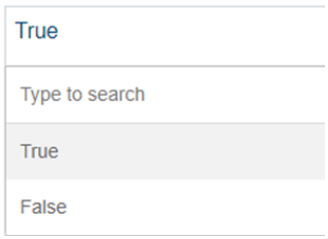
You want to record which material is required for a particular Project? To do this, you create a "Radio" component, which will look like this once you have completed it. (You can find out how to create this under "Radio").



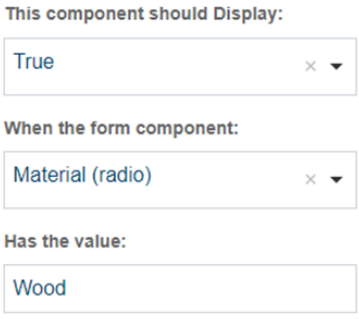
In the event that "wood" is selected, the wood
type should be specified in a further component.
(In this example, you can see the "Selection" component).



To ensure that this field only appears
if you have selected "Wood", proceed as follows:
In the selection component labelled
"Wood type", open the "Dependencies" tab.
You now want to make the following changes there:
The "Wood type" component should only be displayed
if the value in the "Material" component is "wood".
The display or non-display is achieved
by selecting "True" or "False" under
"Display component". In our example, we select "True".



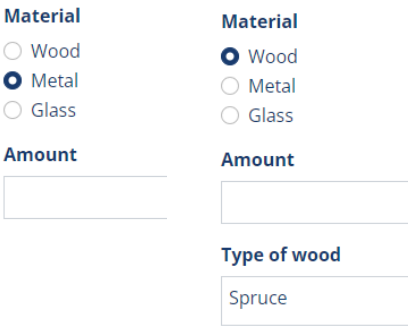
The component from which the dependency originates,
under "If the component".
In our example, its name is "Material (radio)".
Finally, specify the value that determines
whether the variable component is now displayed
or not, in this case it is "wood".



Attention: The actual value of this
is initially generated automatically.
You will find it in the component,
in which you entered it,
here under "Material", specifically under "Data".

To be able to work faster,
you can also assign your own values,
which you can then also use for
for defining the dependencies.

In conclusion, the following
possibilities of representation:

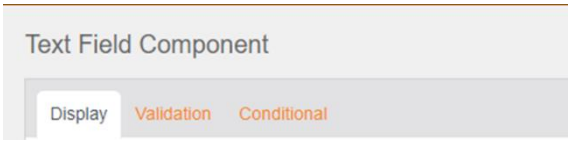


3. Main components

3.1. Text (short)

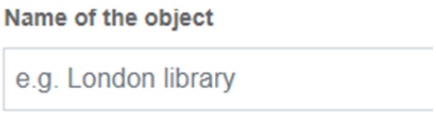
This field is suitable for manual text entry that fits on one line.

Display Area:



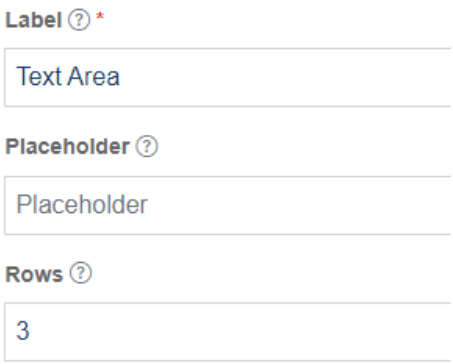
You can optionally enter a placeholder text in the text field itself, which is then overwritten by the actual entry when the form is used.

Example:



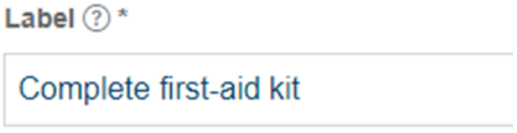
3.2 Text Area

Similar to the short text field, you will find the obligatory description and an optional placeholder text. You can also specify the number of lines required.
Validation, data and simple dependencies function as described in the introduction to Main components.

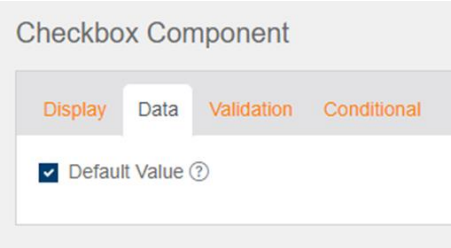


3.3 Checkbox

With the simple checkbox component, you assign a name for a checkbox that can later be ticked or left blank in the form.



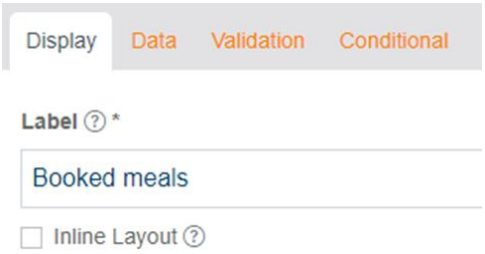
Optionally, you can specify that the default value should not be a free field but an already ticked field. To do this, under "Data" tick the box for "Default value".



Accordingly, the form will show a box already filled in, from which the tick can of course also be removed[2].

3.4 Select Boxes

As the name of the component suggests, this involves several checkboxes. This component is ideal when all options should be visible immediately and you want to be able to select more than one option at the same time.
The boxes can not only be arranged one below the other but also inline.



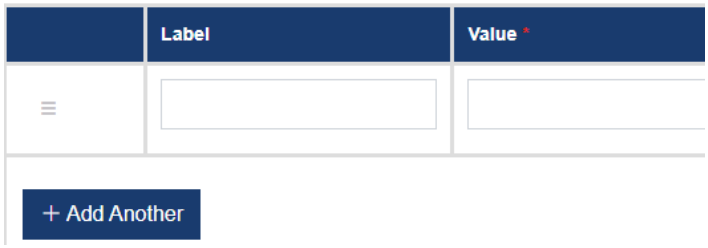
Here are two examples

1) Inline

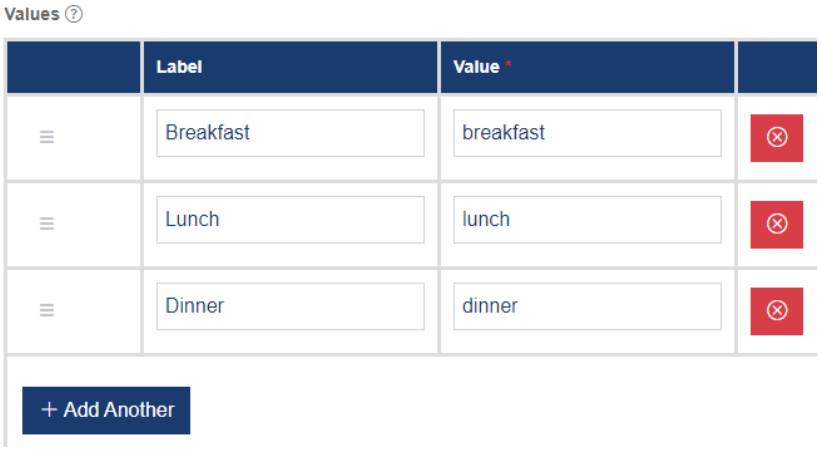
2) Among each other

[2] This component cannot be the basis for a dependency, as it does not contain any values in the required sense.

The designation of the corresponding checkboxes under "Data":



Simply enter the desired terms under "Data" and save your entry. Here you can also specify under Default value, as with the checkbox, whether the boxes should be ticked or remain empty.



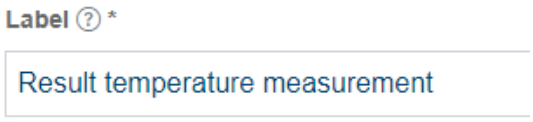
In the finished form, all options are immediately visible and more than one can be selected.

3.5 Select

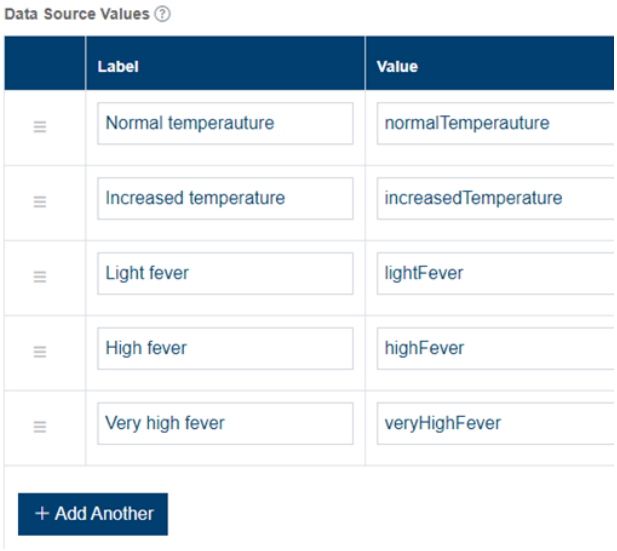
The select component works in a similar way to the checkbox component. The difference is that a selection first appears in the form, where you can only choose one of the displayed options.

Here is an example:

Assign a designation.

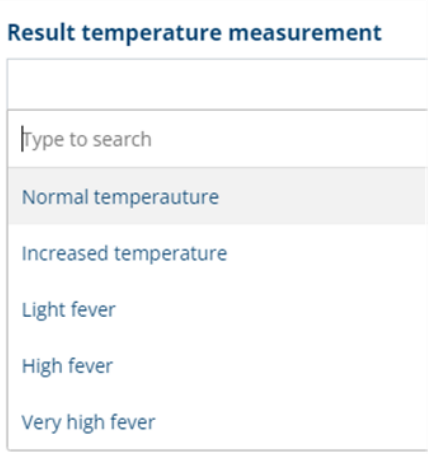


And the choices.



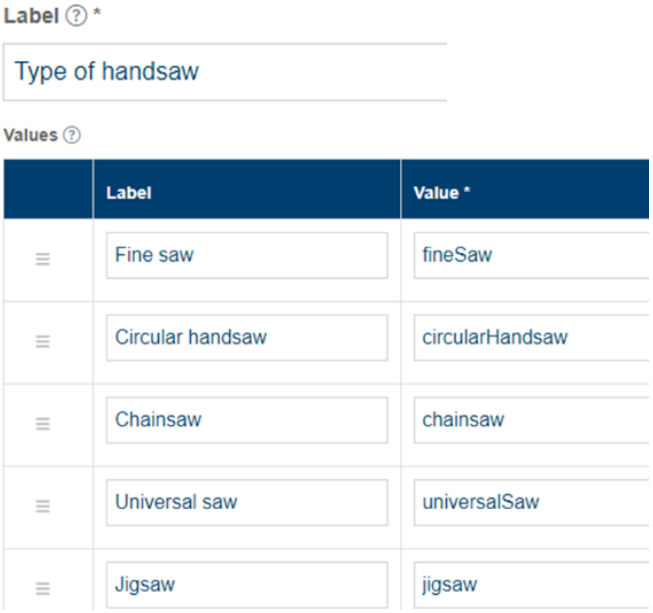
In the finished form
the following will appear:

By clicking on the free field
the selection finally appears:



3.6 Radio

The Component is ideal if you want the clickable options to be visible immediately, but only one of the options can be selected. It is just as easy to set up as the checkbox or selection component: Assign a name and name the various options under "Data".



Just like the checkboxes, you can arrange the radio buttons either inline or one below the other.

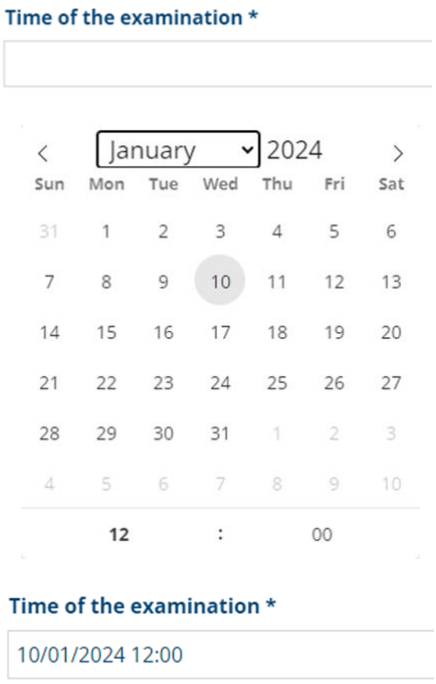
In any case, this component allows you the selection of only one option4[4].

[4] If you want more than one option to be selectable, set up the "Checkboxes" component.

3.7 Date/Time

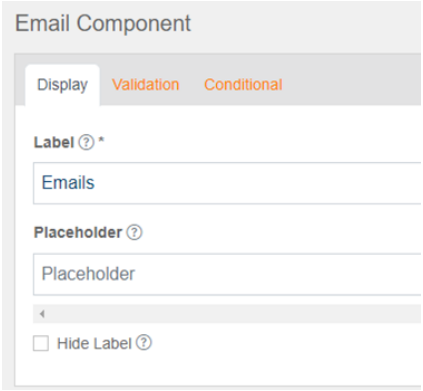
You can define various parameters yourself in this component. The default format is dd.MM.yyyy HH:mm, i.e. day/month/year and hour/minute. If you prefer the US version, you can change this manually to MM.dd.yyyy. You can also display the year with only two digits by selecting the format dd.MM.yy.

In any case, a calendar appears in the form when you click on the free field, in which the date and time can be selected. Those are then displayed in the preset format.



3.8 Mail

This component works in the same way as the text field (short): A description is mandatory, everything else such as a placeholder, a validation or the specification of dependencies is optional.

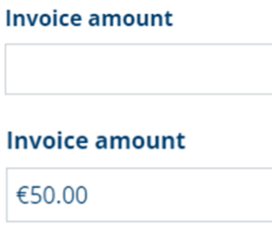


3.9 Telephone number

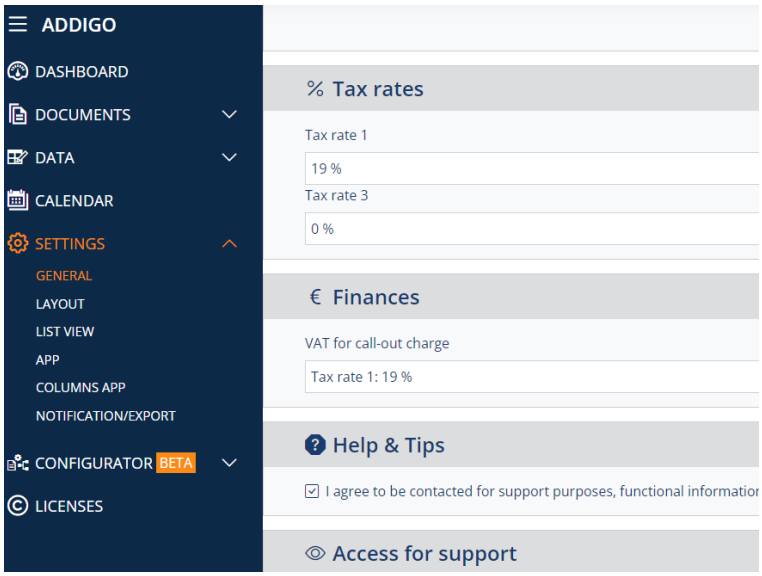
This component can also be used intuitively and works like a short text field. You can find out how to use the "input mask" for your purposes in the section on the Text (short) component.

3.10 Currency

At this point you can enter a specific amount of money.
The default currency is the euro. As soon as you enter
an amount in the form the euro symbol will appear automatically.



Please change the currency in the
general settings under "Finances".



3.11 Signature

A predefined signature field appears in every new form you create. You can of course add further signature fields if required.

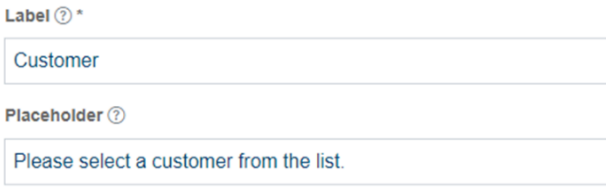
4. Predefined fields

4.1 End date

This predefined field can only be assigned once per form. Once you have integrated it into your form, it disappears from the selection of predefined fields.

4.2 Customer

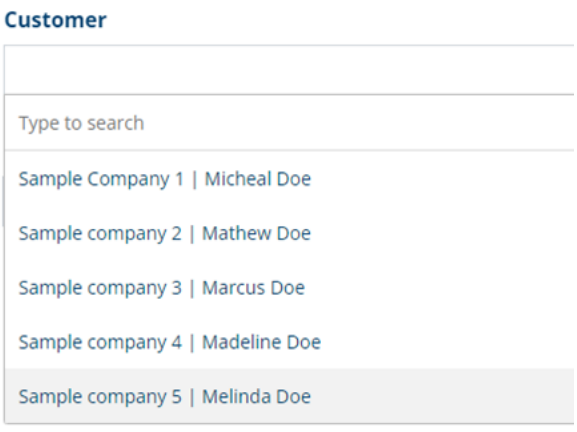
This component behaves in a similar way to the main component "Selection". Firstly, you can not only assign a name under Display but also define a placeholder text.



Display in Formular:

The difference to the selection component is that you do not have to enter the customers yourself in the template configurator under "Data", but that the component gets this information from your customer directory.
So for this component to work, you must first create the required customers under Data and Customers.

If you have done this successfully, a selection is automatically generated in the "Customer" component:



4.3 Customer (with address)

In this component, you can select a customer in exactly the same way as above and also enter an address and define its dependency. In the customer directory itself, it is always possible to enter a delivery address and a different billing address. This component is therefore particularly suitable for cases in which you want to enter an additional address. For an explanation of its functions, see Main components > Date / Time. These components are identical.

4.4 Photos (jpg, png)

With the help of this component, you enable your employees to attach images when filling out the form. This is possible using the camera function or with saved images[4].

This component can only be assigned once in each form; however, several images can be added when using it.

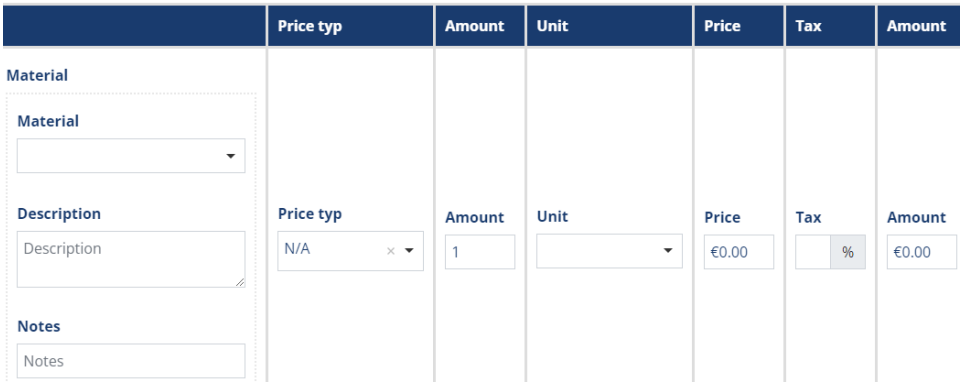
4.5 Attachments (pdf, jpg)

You can also use this component to enable your employees to attach a PDF or JPG to the form. For this reason, you will also find the camera function here.

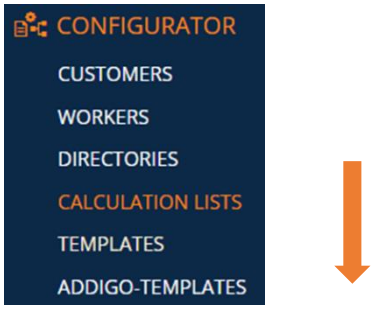
This component can only be assigned once in each form; however, if it is used, several attachments (e.g. a PDF and a JPG) can be added.

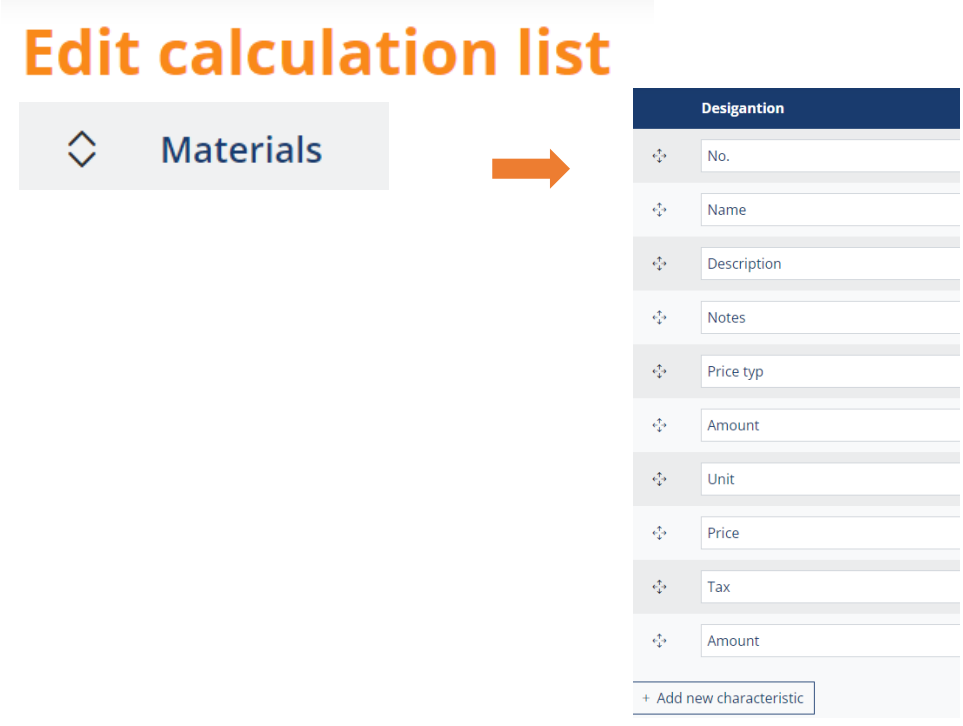
4.6 Materials

This is a data grid with predefined fields that can be changed according to your requirements.



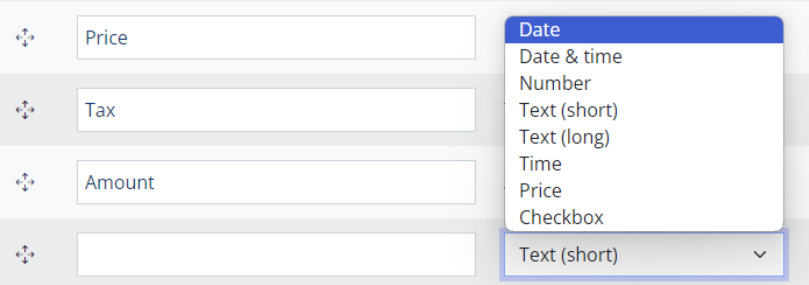
You can make these changes individually for a form in the generator itself or generally under "Costing lists", so that the modified fields always appear as soon as you use the "Materials" component.





The changes you make here also affect the material directory in general. This means that you can configure both the material directory and the fields of the "Materials" component at this point.

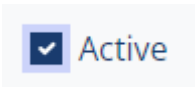
You can rename or move the various properties of the materials and also add new properties. When adding a new property, a selection for the type of field appears. Here you can choose from various main components.



If you want to use a new property for your new template, create it under "Calculation list" and tick the box "Displayed under name". To make the changes visible in the cockpit, you must add the "Materials" field in the template configurator! The newly added property should then be visible.

As with "Customer", you do not have to store the data in the template generator itself, but - in this case - in the material directory. This is where the selection is fed from. You can create materials under Data > Materials.

Always mark the newly created material as active at the end, so that it actually appears in the selection.

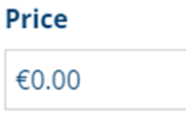


If you do not (yet) mark the material as active, it will be highlighted in red in the overview:

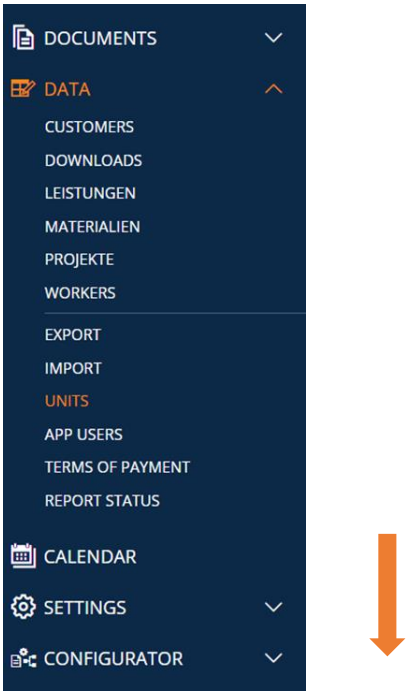
No.	Name	Description	Price
01	larch wood	100x40x3	40,00 € pro pc
02	oak wood	width 100x40x3	70,00 € pro pc
03	spruce wood	width 100x40x3	12,00 € pro pc

“Price type" is also a selection. The default settings are three options "per unit", "fixed price" and "no specification".

“Price" refers to
the "Currency" component.
This always refers to the net price.
The gross amount is shown automatically when the invoice is created.



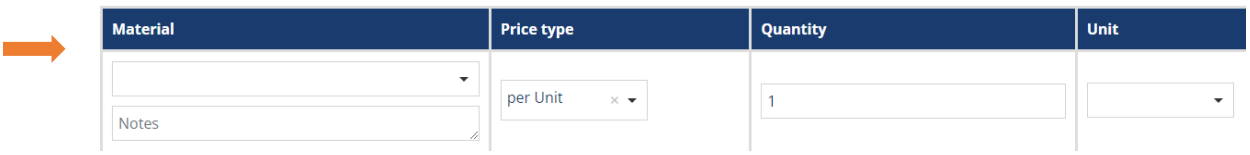
The "Unit" is again a selection that is fed from the various units of measurement that are stored under Data > Units of measurement. You can also easily create additional units of measurement at this point.



Here too, tick the "Active" box so that the unit of measurement appears in the selection of units of measurement in the template generator. For "Quantity" and "VAT" is the number component, while "Amount" is the currency component. Again, the net price is meant here, as the gross amount is generated automatically when the invoice is created. As "Materials" is a data grid, as mentioned above, you can expand or extend this field as required. (Further information can be found in the notes on the data grid).

As is usual with a data grid, the task provides your employee with the following view:

When you click on the "Add new row" button, a "short form" of the data grid appears first.



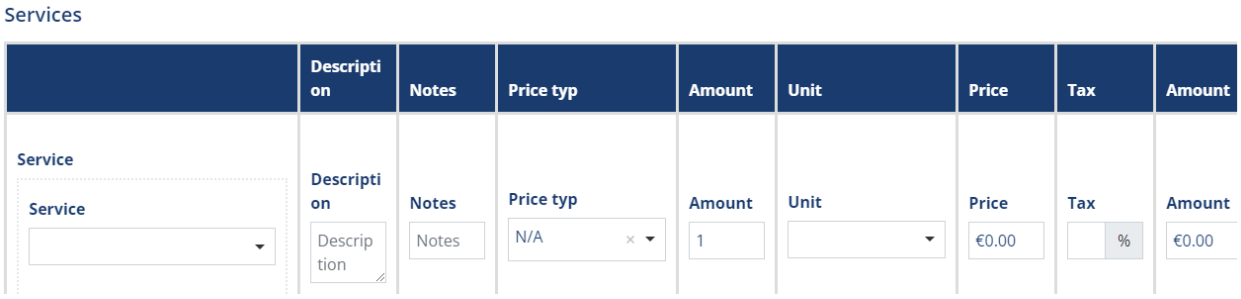
The remaining fields (defined in advance under Configurator > Costing lists > Materials or in the form generator itself) only appear after the material has been selected.

If the price type is "per unit", the amount for this material is calculated automatically when the quantity is specified.

Your employee can add further materials using the "Add new line" button.

4.7 Services

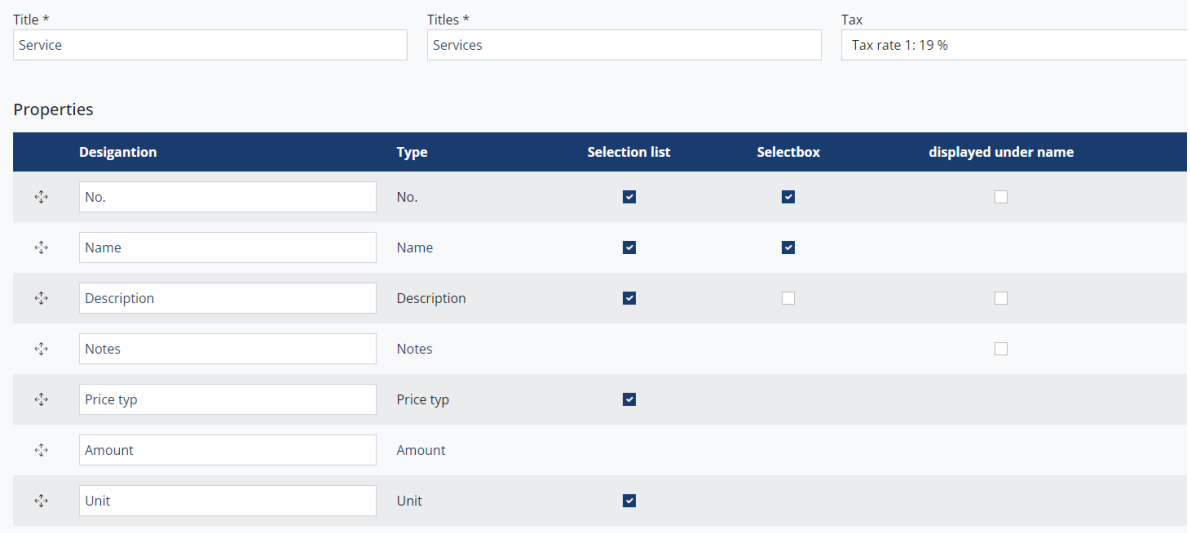
Just like the materials, the services are a data grid component whose individual fields can be customised according to your requirements.



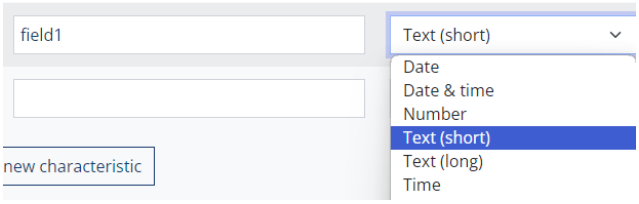
The fields can be modified either in the configurator itself or - if you want to make fundamental, permanent changes - under Configurator > Costing lists > Services.

In the second case, the customised fields always appear when you use the "Services" component.

The changes you make here can also affect the service specifications in general. This means that you can configure both the service specifications and the fields of the "Services" component at this point.



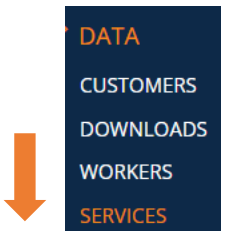
You can rename or move the various properties of the services and as well add new properties. When adding a new property a selection for the type of field appears. Here you can choose from various main components.



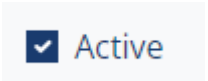
If you want to use a new property for your new template, create it under "Calculation list" and tick the box "Displayed under name". To make the changes visible in the cockpit, you must add the "Services" field in the template configurator! The newly added property should then be visible.

As with "Customer" and "Material", you do not have to enter the data in the form generator itself, but - in this case - in list of services. This is because the selection is fed from this.

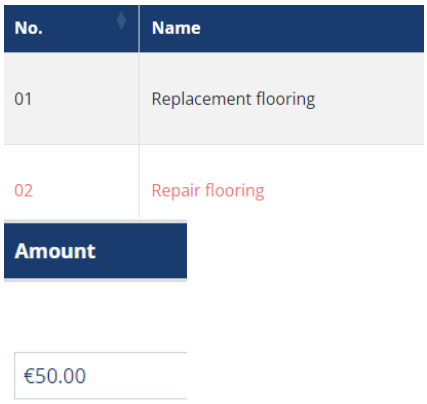
You can create services under Data > Services.



Always mark the newly created service as "active" so that it really appears in the selection.

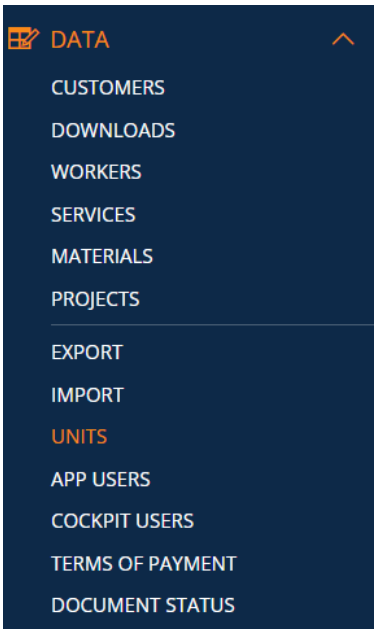


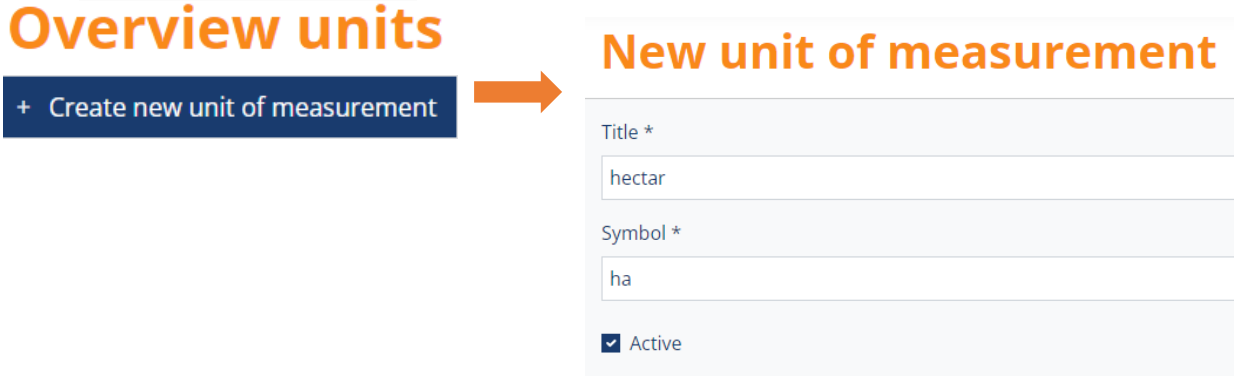
If you do not mark the service as active,
it is marked in the overview in red.



“Price" refers to the "Currency" component.
This always refers to the net price.
The gross amount is shown automatically
when the invoice is created.

The "Unit of measurement" is again a selection that is fed from the various units of measurement that are stored under Data > Units of measurement. You can also easily create additional units of measurement here.





Here too, tick the "Active" box so that the unit of measurement appears in the selection of units of measurement in the configurator.

„Quantity" and "VAT" are each the number component, while "Price type" is again a selection. The three options "per unit", "fixed price" and "no specification" are preset.

	Label	Value
≡	N/A	0
≡	fixed price	1
≡	per Unit	2

+ Add Another

„Amount" is again the currency component. Once again, the net price is meant here, as the gross amount is generated automatically when the invoice is created.

As "Materials" is a data grid, as mentioned above, this field can be expanded or extended as required. (Further information can be found in the notes on the data grid).

As is usual with a data grid, the task provides the following view:

Services

Service	Price type	Quantity	Unit	Price	VAT	Total

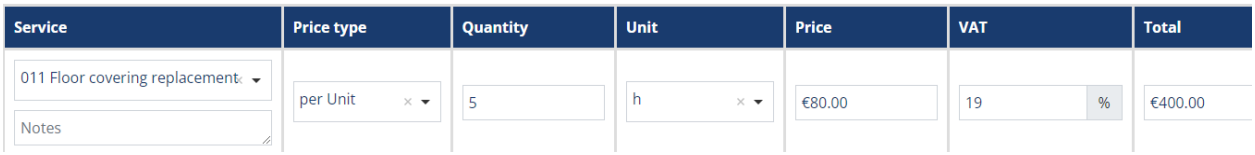
+ Add new line

When you click on the "Add new row" button, a "short form" of the data grid appears first.

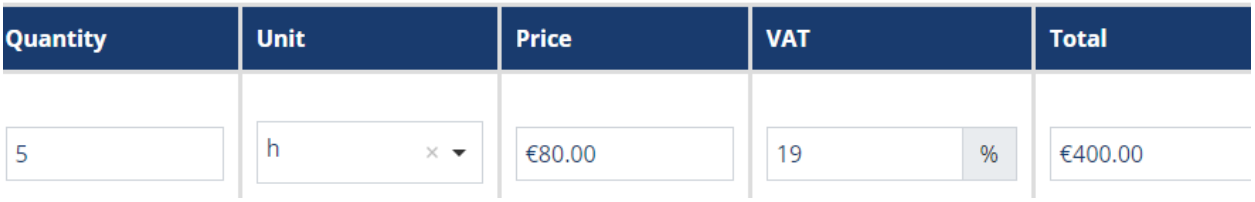
+ Add new line

Service	Price type	Quantity	Unit
	N/A	1	

The remaining fields (defined in advance under Configurator > Calculation lists > Services or in the template generator itself) only appear once the service has been selected.



If the price type is "per unit", the amount for this service is calculated automatically when the quantity is specified.



Additional services can be added using the "Add new line" button.

4.8 Call-out charge

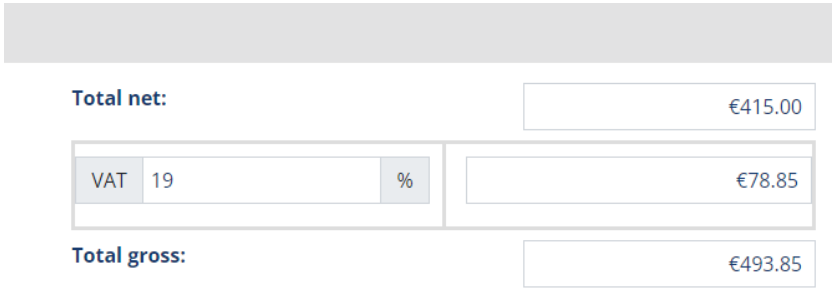
This component is a prefabricated "Columns" layout component. The "Price type" corresponds to the "Selection" component, "Price" and "Amount" to the "Currency" component and "Quantity" and "VAT" to the "Number" component.

As soon as the price type has been selected, the other components of this field appear. If the price type is "per km", the amount is automatically entered after the quantity has been specified.

Note: If you also want to calculate the journey time, it is advisable to create the journey as a separate service, where you can also specify the costs per hour.

4.9 Total

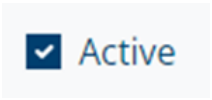
Note: All totals are calculated automatically; you cannot make any changes manually.



4.10 Projects

This field is a "Selection" main component. In this case, however, you do not first enter the required data under "Data" in the component in the template configurator itself, but create the necessary data records under Data > Projects, as the selection is fed from this project directory.

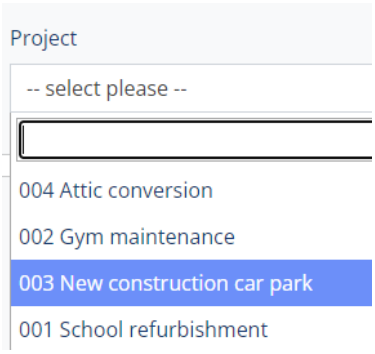
Make sure that you mark a newly created project as "active",
so that it also appears in the selection.



Projects that are not active
are marked in red in the overview.

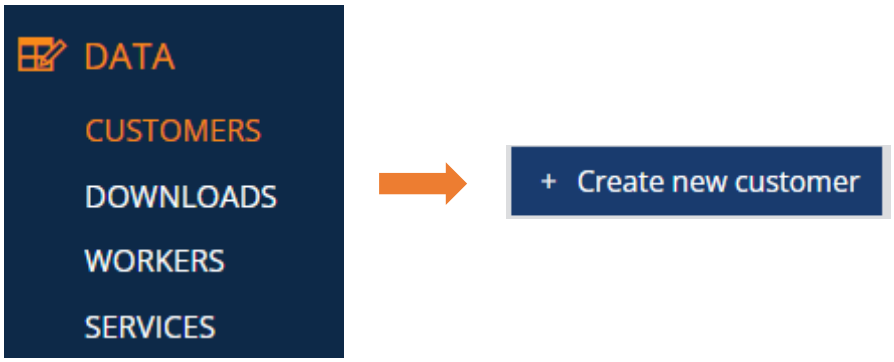
Nr.	Name
001	School refurbishment
002	Gym maintenance
003	New construction car park
004	Attic conversion

The task results in
the following view:



4.11 Customers

This field is a "Selection" main component. In this case, however, you do not first enter the required data under "Data" in the component in the template configurator itself, but create the necessary data records under Data > Employees, as the selection is fed from this employee directory.

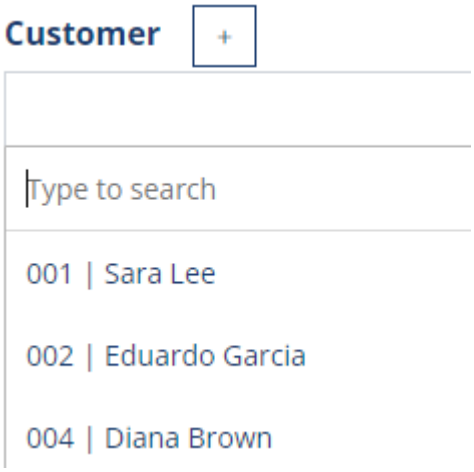


Make sure that you mark a newly created employee as "active"
so that they also appears in the selection.

Employees who are not active,
are marked in red in the overview.

Customer no.	Company name / First na
004	Diana Brown
002	Eduardo Garcia
003	Lucas Potter
001	Sara Lee

The task results in
the following view:



4.12 Total (number format)

A total can be calculated from all selected number fields in this report. Under ‘Summand’, select the corresponding fields for the calculations.

4.13 Total (Currency)

This component works in the same way as Sum (number format), except that in this case it is price information and the respective currency symbol is placed after the sum.

4.14 Additional Information (...)

For these components, information can be selected from the calculation and selection lists. The information is only displayed on the report, but cannot be edited by the app user.

4.15 Signature (optional)

This component can be used as an additional signature field and does not automatically finalize the report when it is signed.

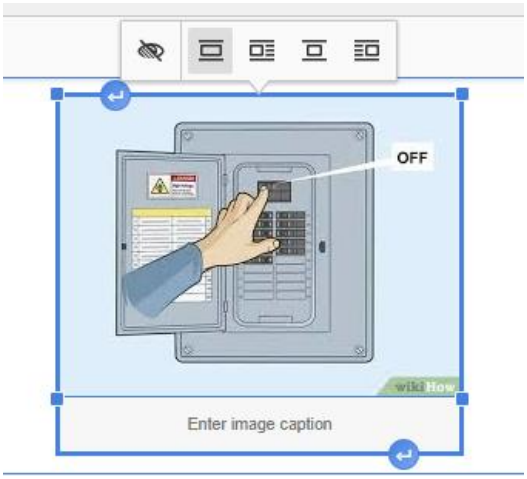
Examples: The field is suitable for multiple signatures on a document or for recurring signatures for e.g. daily sections, enumerations/lists or similar.

5. Layout-Components

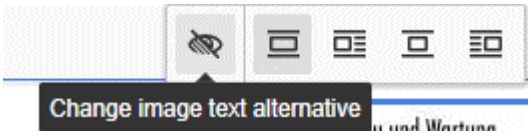
5.1 Content

With the help of this component, you can individually insert elements into your template.
First of all, you have an intuitive text field with formatting options. You can also insert images by copying an image and then inserting it into the content component by mouse click (right).

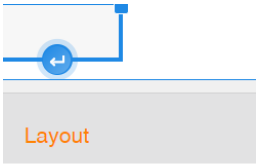
When you click on the image, a blue frame appears with four small markers that you can use to change the sizeof the image. At the same time a selection for the alignment of the image: full screen, left-aligned, centred or right-aligned.



The button with the little eye allows you to enter a placeholder text,
if the image cannot be loaded or cannot be displayed correctly.



If you want to add text above or below the image, click on the small blue arrow symbol at the top or bottom of the image.



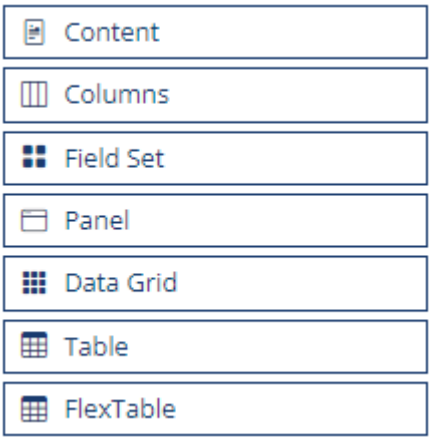
The corresponding message appears
"insert paragraph before block" or "insert paragraph
after block". You can now start writing straight away.
If the image is aligned to the right or left
of the image, you can of course also write next to the image. If you use the arrow at the bottom the cursor jumps next to the image.
(If you use the arrow at the top of the image, the text
text continues to appear above the picture).

Recommendation

Due to the switching noise of impulse switches or similar contactors, distribution boards should not be installed in walls to bedrooms or children's rooms.

Ordering and organising layout components

The layout components Columns, Field Set, Panel, Data Grid and Table are generally intended to to organise and group main components clearly or to create order in the template by dividing it into meaningful sections.

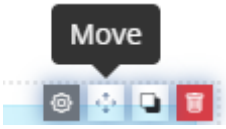


The Columns, Data Grid and Table components also ensure better organisation in the report view of the cockpit, because components can also be arranged horizontally in them, allowing you to save vertical space in the template generator or in the display of tasks in the cockpit. (For your app users, the components in the app are still displayed below and not next to each other).

A major advantage of layout components is the ability to use "dependencies" to display all of the main components they contain **only when they are actually needed for a specific task.**

Another advantage of layout components is that when creating a template, you can **duplicate the entire layout component** with the main components it contains, if necessary, without having to create them all again.

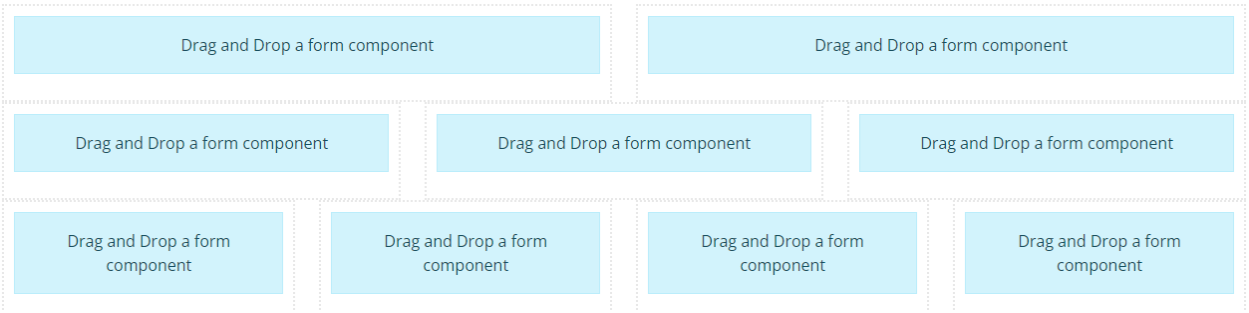
All organising layout components can be conveniently filled using **"drag & drop"** and, once placed in them, main components can be easily moved to the desired position using the corresponding option in the menu.



5.2 Columns

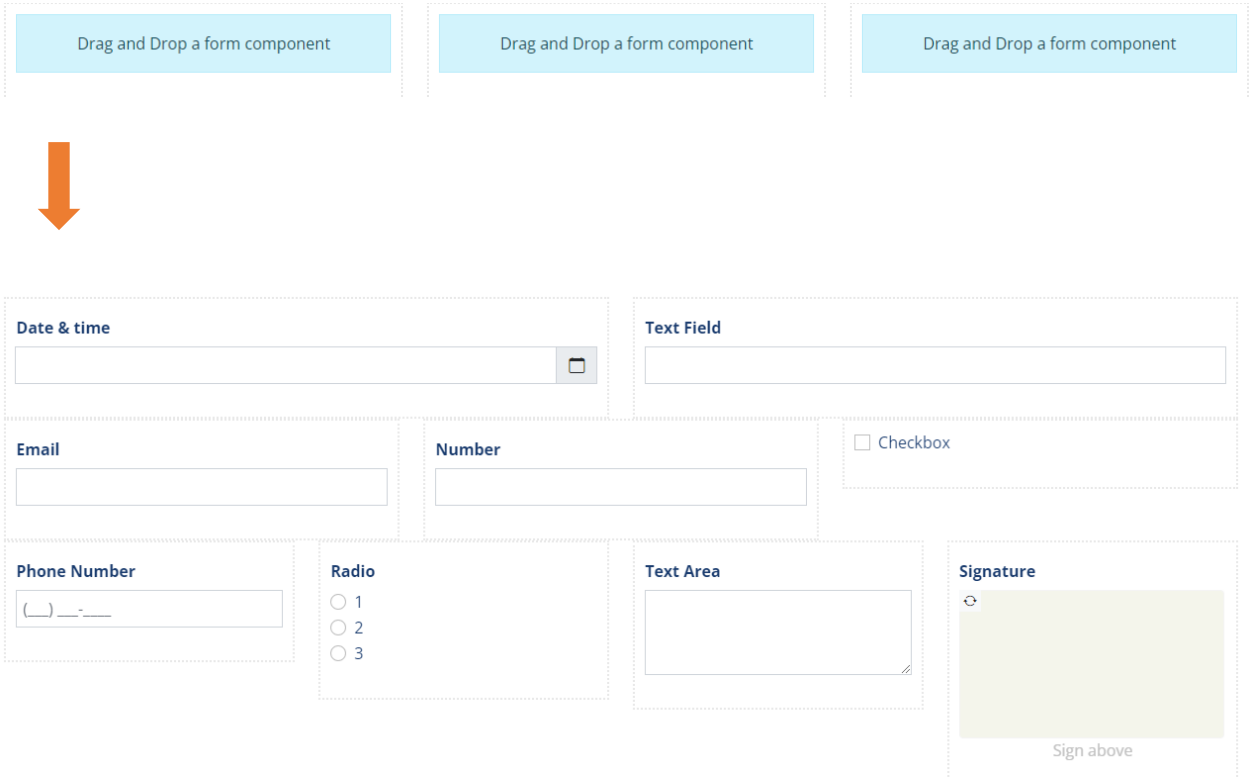
The columns can be formatted in a variety of ways. You should always ensure that the **width of a column set totals 12** so that the horizontal space is optimally utilised.

If the width exceeds this value, the columns slide underneath each other instead of next to each other. This gives you the option of generating several sets of columns one below the other, for example a total of 9 columns with the widths 6-6, 4-4-4, 3-3-3-3. This setting produces the following image:



You can now **fill** the empty columns created **with main components**.
You can create multiple components within a column.

Example:

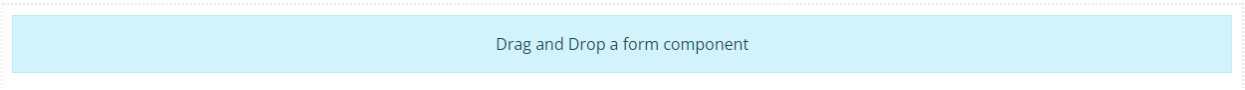


No heading is created for the component itself in this layout component. However, you can easily do this yourself with the "Content" layout component.

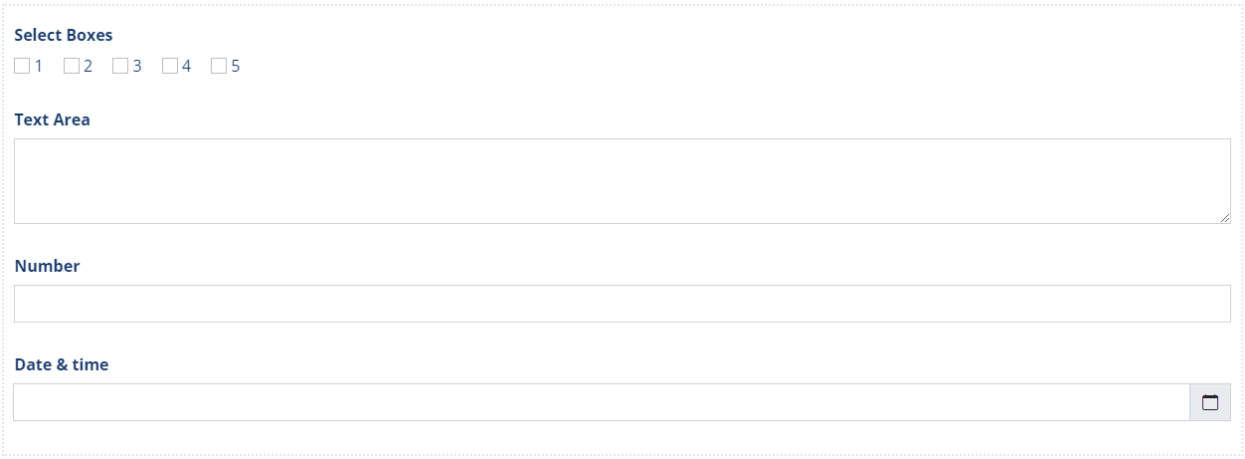
Note: The editing fields for the "Columns" overlap with those of the main component at the top right-hand edge.

5.3 Field Set

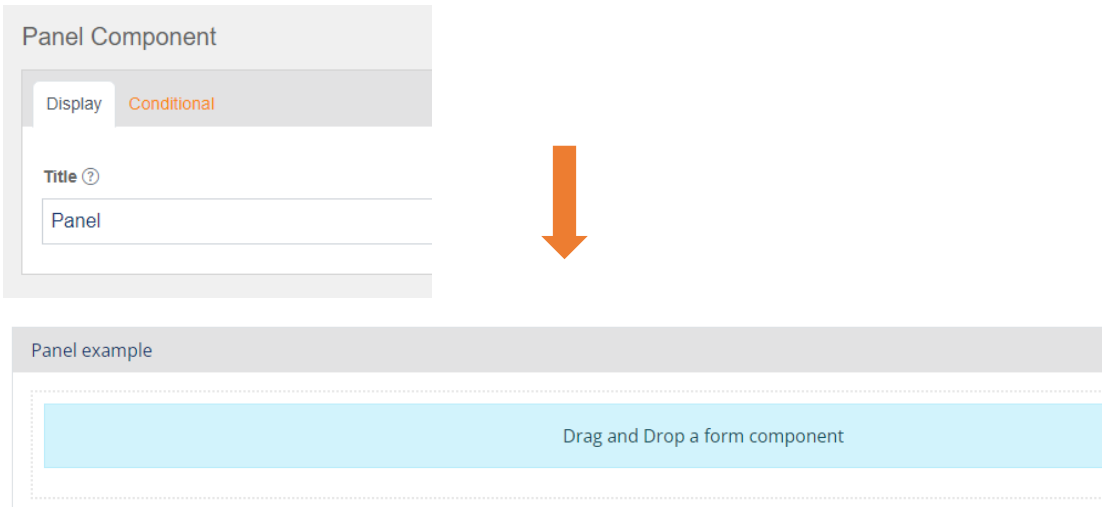
The components are also moved to the field set using drag & drop.



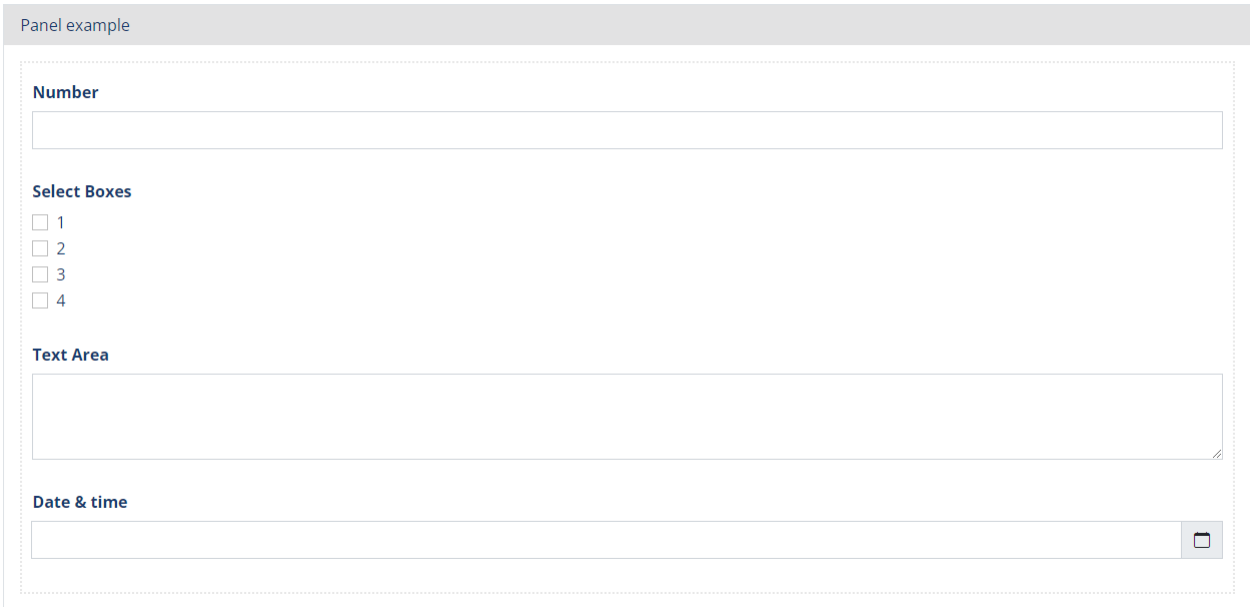
In contrast to the columns, however, the main components can only be arranged one below the other.



5.4 Panel



The key function of the panel is that it can be opened and closed. As long as it is not being worked on, it takes up very little space and only needs to be opened or unfolded when entries are made there.



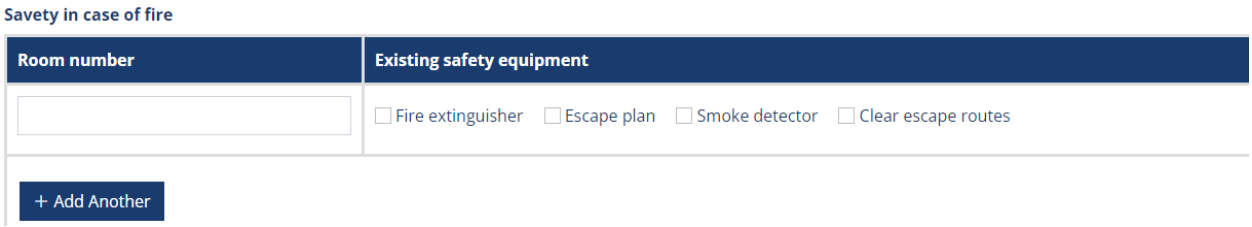
Note 1: Expanding and collapsing works in the task, but not in the template generator itself. The entire panel is always visible there.

Note 2: Despite the "pop-up", there is no risk of forgetting to fill in essential fields in a panel. As long as these are labelled as mandatory fields under "Validation", an error message will be displayed before you send the form if any information is missing.

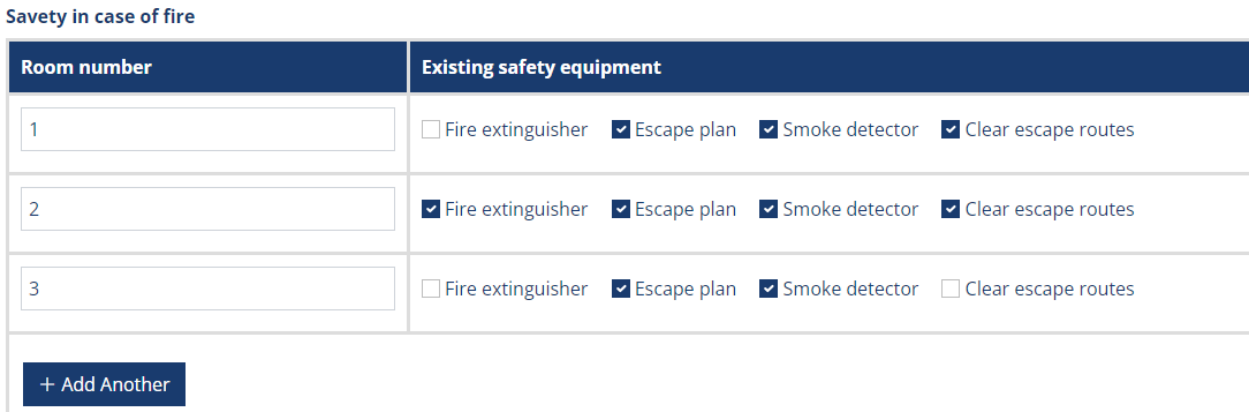
5.5 Data Grid

It makes sense to use a data grid if you repeatedly request the same data for similar cases and it is necessary for your local employee to be able to decide for themselves how many cases they want to record data.

Here is a practical example to illustrate this:



In this example, the safety of rooms in the event of a fire is to be documented for a school. The same data is always requested for many different rooms. The employee on site can now add any number of rooms using the "Add more" button and document the safety equipment.



Theoretically, you can arrange any number of main components horizontally next to each other in a data grid. However, the more columns you create, the narrower they will be displayed in the cockpit.

For your employee in the app, however, these elements, i.e. the different main components, are displayed vertically, so that clarity is maintained at this point in any case.

In this example, the main component "Number" was used for the room number and the main component "Checkboxes" was used for the existing safety devices.

Note 1: The double labelling of the fields is only visible in the template generator. In the task itself, only the first row of the data grid has the corresponding name.

View in the configurator:

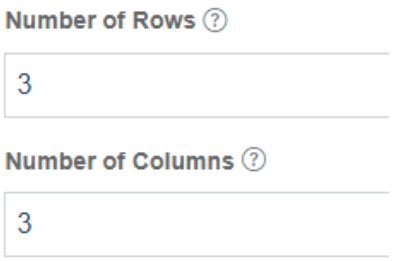
View in the task:

You can label the button for adding additional lines yourself. This is visible in the task, but not in the template generator.

5.6 Table

With a table, you save vertical space in the document in the cockpit view, just like with columns or the data grid.

You can define the number of rows and columns yourself.



You have various options for formatting the table:

You can use the "Striped" and "Frame" options to visually emphasise the table in the template.

“Striped" shades every second line in grey, while "Frame" adds visible lines to the table.

The hover effect causes lines to be highlighted when you move the mouse over them.

These functions are for clarity and are only visible in the cockpit.

5.7 What is what?

Pictorial glossary

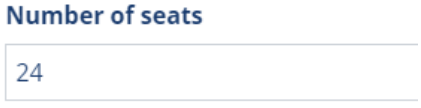
Main components

(Note: The names of the components and their contents are examples for illustrative purposes only).

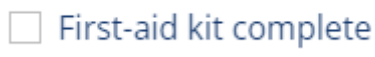
Text (short)

Text (long)

Number



Checkbox



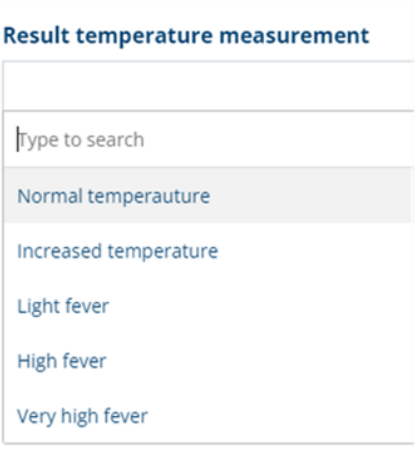
Checkboxes

Booked meals

- [x] Breakfast
- [ ] Lunch
- [x] Dinner

Selection

Result temperature measurement



Result temperature measurement

Mild fever

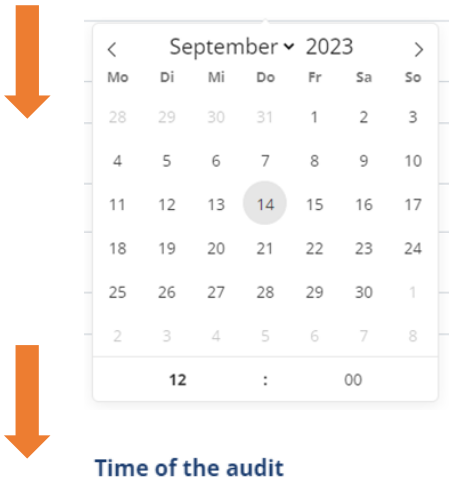
Radio

Type of handsaw

- ○ Fine saw
- ○ Circular handsaw
- ○ Chainsaw
- ○ Universal saw
- ○ Jigsaw

Date/ Time

Time of the audit



Time of the audit

14/08/2024 12:00

Mail

Email address:

Phone Number

Telephone number (mobile)

(___) ___-____

Currency

Invoice amount (gross)

Invoice amount (gross)

€2,750.00

Signature

Signature