Step 3: Designing Mobile Forms

Designing a Mobile Form

Related Documentation:

- Mobile (German)
- BPaaS
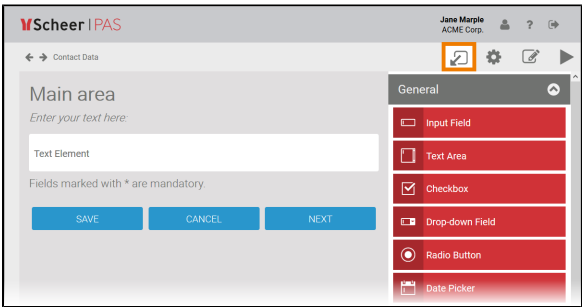
The mobile form contains a predefined area including the following elements:

- the explanatory text **Main Area**
- the explanatory text **Enter your text here:**
- the input field **Text Element**
- the explanatory text **Fields marked with * are mandatory**
- the navigation element containing the preconfigured buttons **Save**, **Cancel** and **Next**

At the right side of the workspace you find the **New Elements** sidebar. Use it to drag and drop additional form elements onto the workspace.

The elements are classified in four categories:

- **General**
- **App-specific**
- **Mobile Elements**
- **Complex**

Click on the category name to display the associated elements.

If you want to delete a form element, right-click on it.

Select option **Delete** in the context menu.
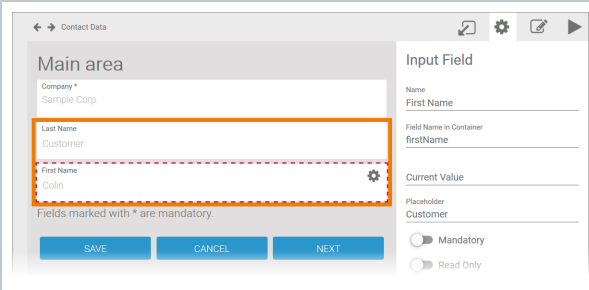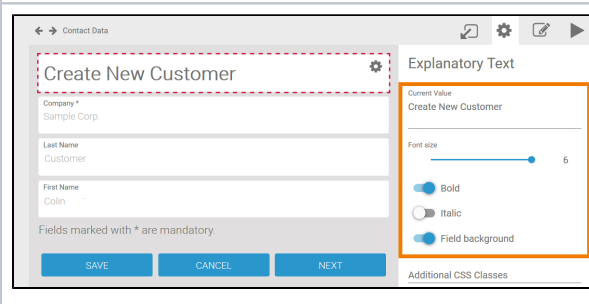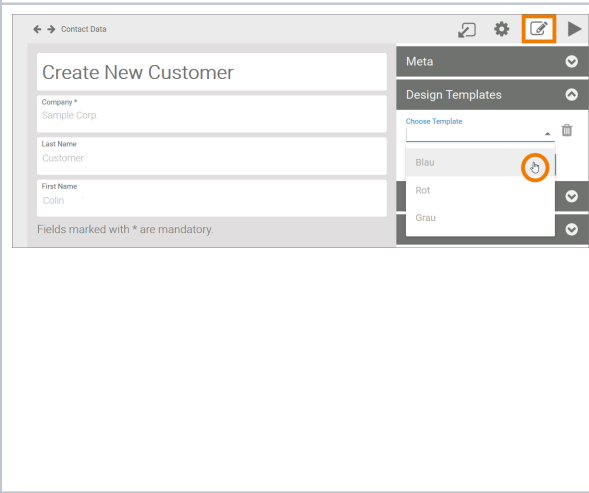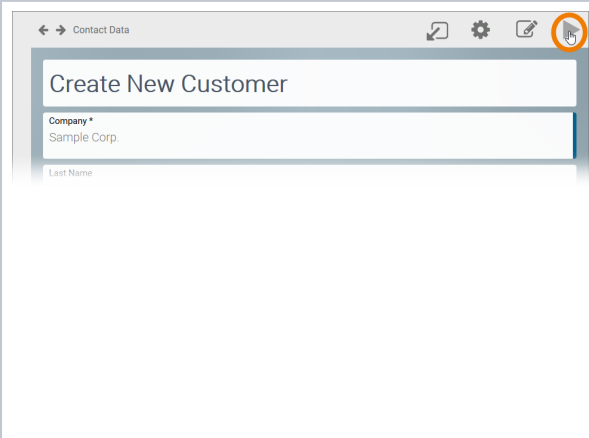

Click on an element to activate it. The active element is marked by a red frame.

In the **Edit Sidebar** ⚙ on the right side of the workspace you can then change the settings of the active element, for example rename the element or define additional field properties.
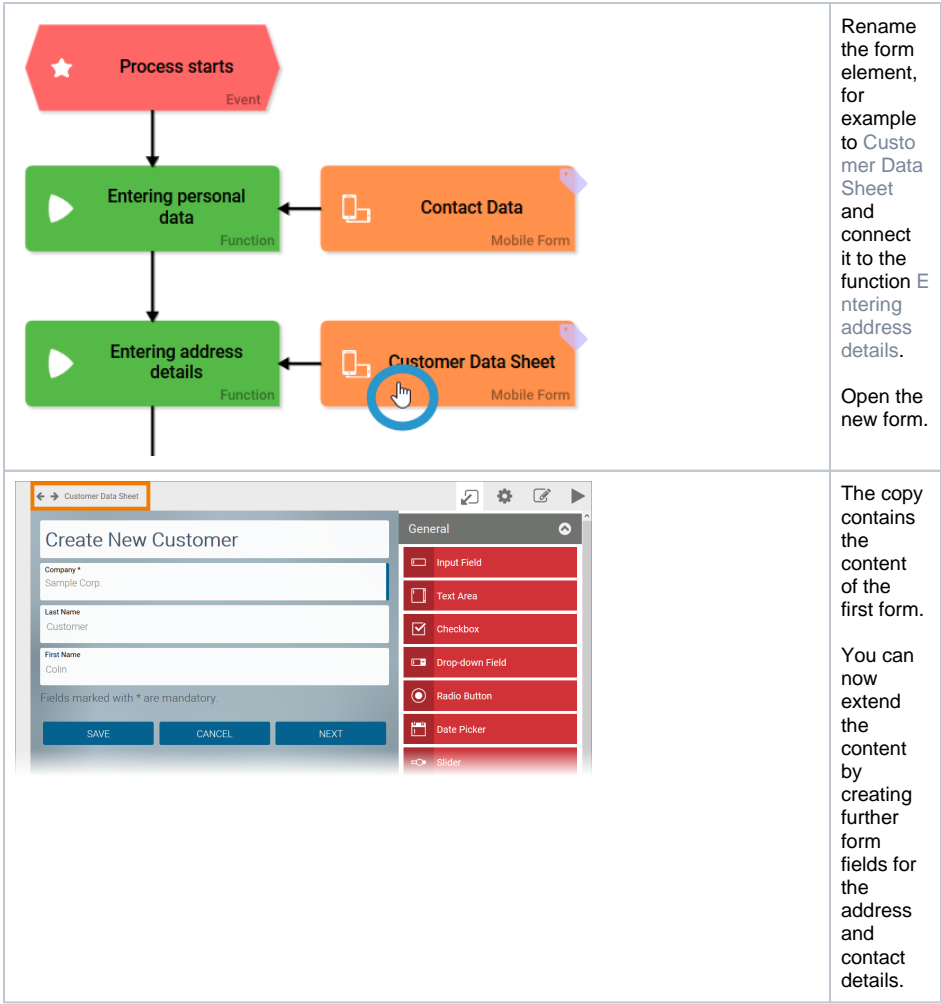
- Rename the existing input field Text Element in Company.
- Change the **Field Name in Container** to company.
- Enter an appropriate placeholder that is displayed as a sample entry.

	Create two new input fields for first name and last name of the contact.
	Use the existing **Explanatory Text** element for your own heading and design it in the **Edit Sidebar**.
	Switch to the sidebar **Form Properties** and open the category **Design Templates**. Choose one of the templates.
	Use the **Play** button to execute your model. If you use the preview function in the Forms Editor, only **the current form** is displayed.

The form view is displayed in a pop-up window.

The icons at the top of the screen allow you to switch between the different views:

- **Mobile phone** (upright)
- **Mobile phone** (landscape)
- **Tablet** (upright)
- **Tablet** (landscape)

Try different views, then close the window.

If you want to add more fields or rework the layout, you can now make further adjustments in the Forms Editor.

When your form is finished, navigate back to the EPC.

Reusing Mobile Forms

In the next process step, the user shall insert the address details of the customer, but the contact person's details should also be displayed again. Therefore you can reuse the first form Contact Data.

Right-click on the form element Contact Data to open the context menu.

Select option **Copy**.

Then right-click on the empty workspace and choose the context menu option **Paste > As Copy**.

A copy of the first form is created on the workspace.

Rename the form element, for example to Customer Data Sheet and connect it to the function Entering address details.

Open the new form.

The copy contains the content of the first form.

You can now extend the content by creating further form fields for the address and contact details.

Entering an address may take too long for the user on site. Therefore Jane Marple wants to provide the possibility to upload a picture of the customer's business card. This allows the employee to save the data on site and to complete the customer data sheet in the database later.

Open the category **Mobile Elements** and create a camera field.

Define a **Maximum Number of Images** for the element.

Jane then reworks her Customer Data Sheet as follows:

Customer

Company *
Sample Corp.

Last Name
Customer

First Name
Colin

Business Card
Add image
0/2

Contact Details

Email
john.doe@example.com

Phone

Mobile

Address Details

Address
Street   Number
Zip   City
Country
United States   ×   ▾

Fields marked with * are mandatory.

SAVE   CANCEL   NEXT

- She changes the **explanatory text** element Create New Customer to Customer.
- She keeps the **input fields** Company, Last Name and First Name.
- She adds two other **explanatory text** elements as title fields: Contact Details and Address Details.

- In section Contact Details Jane adds the **email element** Email and the two **phone elements** Phone and Mobile.
- In section Address Details, Jane uses an **address element**: Address.

When your form is finished, navigate back to the app project.