New User’s Guide
Everything You Need to Know to Get Started
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Get to Know
Your Dashboard
Get to Know Your Dashboard

Your Dashboard is the main hub for your Device Magic account. This is where you will create forms, invite new devices, upload resources, create destinations, and much more.

What Your Dashboard Looks Like

1. **SUBMISSIONS**: A brief history of all of the submissions made on your account over the past month.

2. **ACCOUNT ACTIVITY**: A list of the recent activities from your Organization, from device approvals to form submissions.

3. **SUMMARY**: How many devices are connected to your account, how many forms you have created, and your Org Key.

4. **HELP CENTER**: Access our Help Center to find answers to your questions.

5. **INVITE DEVICE**: Click this button to add additional devices to your account.

6. **NOTIFICATION BAR**: Error alerts, delivery issues, and new devices asking to join your Organization.
Connecting a Device
Connecting a Device

Connecting a new device to your Organization is easy. You can invite someone to join from your Dashboard or they can join when they download the Mobile Forms app.

Option 1: Invite a Device From the Dashboard

Click the “Invite Device” button on your Dashboard's homepage.

Enter the email address or phone number of the user/device you want to join your Organization. When you’re done, click “ Invite”.

The device owner will receive a text message or email with a link directing them to download the Mobile Forms app and connect them to your Organization.

DID YOU KNOW?

When you invite a device from your Dashboard, they will instantly get access to the forms you’ve built once they join.
Option 2: Join an Existing Team From the Mobile App

A new user/device can also join your Organization by downloading the Device Magic Mobile Forms app in the iTunes or Google Play store.

When the app loads for the first time, you will be asked if you would like to “Create a New Organization” or “Sign in to an Existing Team”.

QUICK TIP:
To join from the app, a new user will need to know your Org Key. You can find that on homepage of your Dashboard.

Select “Sign in to an Existing Team”. Enter your full name, Organization Key, and click “Join My Team”.

The Organization Admin will receive an email that a new device would like to join their Organization. Once the Admin approves the device, that device can start collecting and submitting forms.
Build

Building Your First Form
Building Your First Form

With a simple drag-and-drop form builder, it couldn’t be easier to create your forms for more efficient data collection.

The Forms Builder Menu

Visit the “Forms” page on the Dashboard and click “Build Form”. You will be taken to the form builder where you create and edit your Organization’s forms.

CUSTOMIZING YOUR QUESTION FIELDS:

Your questions can be renamed to give it the label of your choice. Every question has a set of settings and advanced settings that you can adjust to suit your needs. You can learn more about all of your question types here.

SAVING YOUR FORMS:

When you are done building your form, click “Save & Exit” in the top right hand corner. From here, you will be redirected to your Destination setup page where you will determine what format you’d like your data delivered in and where you would like it to go.

DID YOU KNOW?

When you start your trial, we’ll give you a few demo forms for get you started. You can save, edit, or delete these forms whenever you’d like.

DeviceMagic.com | (855) 257-9650 | marketing@devicemagic.com
Adding a Destination to Your Form
Destinations are the end point for your submission data, the final outcome. This is where all your information, signatures and/or images will go.

How to Setup a Destination:

To set up a Destination for your form, go to your “Forms” page. In the Destinations column, click the hyperlinked number for the form you’d like to add the Destination to.

<table>
<thead>
<tr>
<th>Name</th>
<th>Submissions</th>
<th>Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Services - Daily Job Report</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Delivery Note</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Design a new form</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Driver's Daily Log</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

Once on the Destinations page, click “New Destination”. You will then be taken to the new Destination setup page where you can select where you want your data to go and what format you would like your data delivered in.

You can select a PDF to sent via email to a specific email address. Have images sent to a Box or Dropbox account. A Word doc to a ShareFile account, or any other number of options.

If you have a Word or PDF Destination, click “Show Options” under Step 5 to customize your template. This allows you to adjust how your form will look when it arrives at its Destination.
Get to Know Your Mobile Forms App
Get to Know Your Mobile Forms App

Your Mobile Forms app is where you do the heavy lifting. Here you’ll collect signatures, images, sketches and almost any other data you used to compile with pen and paper.

What Your Mobile Forms App Looks Like

1. **SETTINGS**: Information about the Organization you are connected to.

2. **SEARCH**: Find specific forms, dispatches, drafts or submissions by title or description.

3. **“ALL” TAB**: A list of all forms you have access to on your device including drafts, dispatches, and submitted forms.

4. **“DISPATCHES” TAB**: A list of forms which have pre-populated and sent to you by the Org Administrator or an automated work flow. Learn more about Dispatches [here](#).

5. **“DRAFTS” TAB**: A list of incomplete forms saved to finish at a later time.

6. **“SUBMISSIONS” TAB**: A list of all submitted forms.

**QUICK TIP:**
Your data is automatically submitted to your Device Magic account once the device has connectivity again. No need to re-submit.
Submitting Your First Form
Submitting Your First Form

Completing your first form is simple. Open your Device Magic Mobile Forms app on your device, find the form you want to complete, and start answering questions.

Filling Out a Form

Forms with required questions will not submit until an answer is provided, so make sure the form is completed accordingly.

Once your form has been completed, tap “Submit” (check mark) at the bottom of the form to send.

Submitting a Form

Your newly submitted form will be placed in a queue to be submitted to the server. As soon as you connect to a strong wi-fi or Internet connection, the form will disappear from the queue.

If you don’t have Internet access when you submit your form, don’t worry! The submission will stay in the queue until a connection becomes available.

DID YOU KNOW?

Setting up a Destination can determine exactly what format you want your data delivered in and where you want it sent to.