



— HOW-TO GUIDE • PART 2

BUILD ANY FORM YOUR CREW **NEEDS**

Drag in the fields, preview it on a phone, and add automations that email the right people or open a task the moment a box gets ticked. As simple or as detailed as the job calls for.

DRAG

Drop in any field

PREVIEW

See it on a phone

AUTOMATE

Emails and tasks on their own



CREATING A FORM

Press **Create Form** on the Forms page and the builder opens. Build a two-field sign-in sheet or a full hazard assessment with photos, signatures and automations. Same builder.

1 The builder

2 Field elements

3 Static and media

4 Drag, drop, build

5 Preview it

6 Form settings

7 Element settings

8 Logic and automations

The screenshot displays the Subtrade Forms Builder interface. On the left is a sidebar with a search bar and two tabs: 'Fields' and 'Static & Media'. Under 'Fields', there are buttons for Text, Select, Radio, Checkbox, CheckList, Textarea, Email, Photo Capture, Number, Date, Time, and Yes / No. The main workspace is titled 'Form Untitled' and contains a 'Section 1' box with a dashed border and a calendar icon, with the text 'Drag elements here' below it. A '+ ADD SECTION' button is at the bottom of the workspace. On the right is a 'Form Settings' panel with 'Config' and 'Settings' tabs. The 'Settings' tab is active, showing 'Basic Settings' with fields for 'Form Name' and 'Description (optional)', and toggle switches for 'Form Active' and 'Allow users to duplicate submissions'. Below these are expandable sections for 'Public Access', 'Approval Settings', and 'Signature Settings'.

01

THE BUILDER

FORM BUILDER

ADMIN

Three panels, left to right.

- 01 **Elements** on the left: everything you can add, split into **Fields** and **Static & Media**, with a search box.
- 02 **Your form** in the middle. It starts with **Section 1**; press **Add Section** for more.
- 03 **Settings** on the right: the form's settings, or the settings for whatever element you click.
- 04 Press **Save** top right when you're done.

The screenshot displays the Form Builder interface, which is divided into three main panels:

- Left Panel (Elements):** Contains a search bar labeled "Search elements". Below it are two tabs: "Fields" (active) and "Static & Media". Under the "Fields" tab, there is a list of form elements: Text, Select, Radio, Checkbox, CheckList, Textarea, Email, Photo Capture, Number, Date, and Time.
- Middle Panel (Form Canvas):** Titled "Form Untitled", it shows a form structure with a single section labeled "Section 1". Inside this section is a dashed box with a calendar icon and the text "Drag elements here". A green "Save" button is located at the top right of the canvas. At the bottom center, there is a dark blue button labeled "+ ADD SECTION".
- Right Panel (Form Settings):** Titled "Form Settings", it has two tabs: "Config" (active) and "Settings". Under the "Config" tab, there is a "Basic Settings" section with a gear icon and an expand/collapse arrow. It includes fields for "Form Name" and "Description (optional)". Below these are two toggle switches: "Form Active" and "Allow users to duplicate submissions". At the bottom, there are three expandable sections: "Public Access", "Approval Settings", and "Signature Settings", each with a dropdown arrow.

02

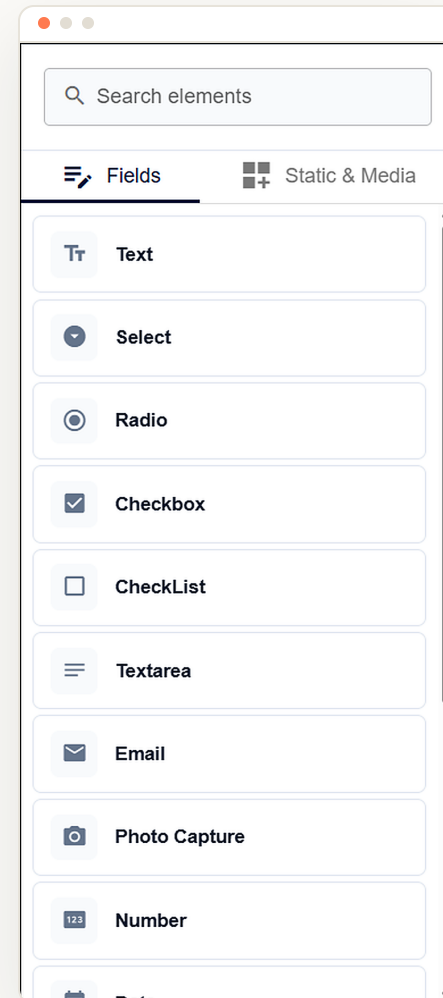
FIELD ELEMENTS

ELEMENTS

ADMIN

What your crew fills in.

- 01 **Text, Textarea, Email and Number** for typed answers.
- 02 **Select, Radio, Checkbox, CheckList and Yes / No** for picking answers.
- 03 **Date and Time.**
- 04 **Photo Capture and Signature** straight from the phone.
- 05 **Contact information and Predefined lists** you set up once in Option Lists.



03

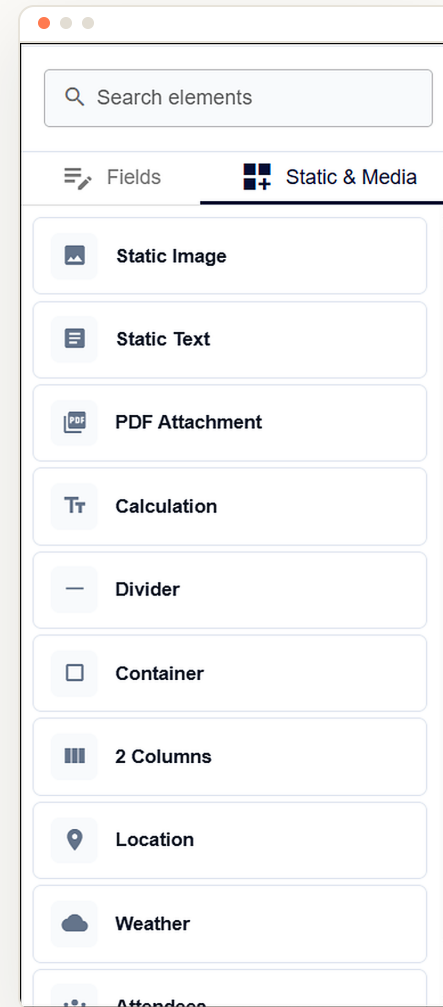
STATIC AND MEDIA

ELEMENTS

ADMIN

Info the crew sees but can't change.

- 01 **Static Image, Static Text** and **PDF Attachment** for instructions, specs and procedures.
- 02 **Calculation** works out a number from other fields.
- 03 **Divider, Container** and **2 Columns** to lay the form out.
- 04 **Location, Weather** and **Attendees** fill in from the job site and crew.



04

DRAG, DROP AND BUILD

EDIT MODE

ADMIN

What you drop in is what the crew gets.

- 01 Drag an element from the left into a section. It shows up right away.
- 02 Give each section a title and a short note, like "Complete before work begins".
- 03 Drag the handle on the left of a section to reorder it.
- 04 The **pencil** is Edit mode. The **eye** is Preview.

Daily Hazard Assessment

Save

ALL HAZARD ASSESSMENTS MUST BE COMPLETED BEFORE STARTING WORK
Complete before work begins - Takes 2 minutes

DATE

FOREMAN

BUILDERS NAME

UNIT / FLOOR:

Location
Tap to capture your current GPS location

No location captured

05

PREVIEW IT

PREVIEW MODE

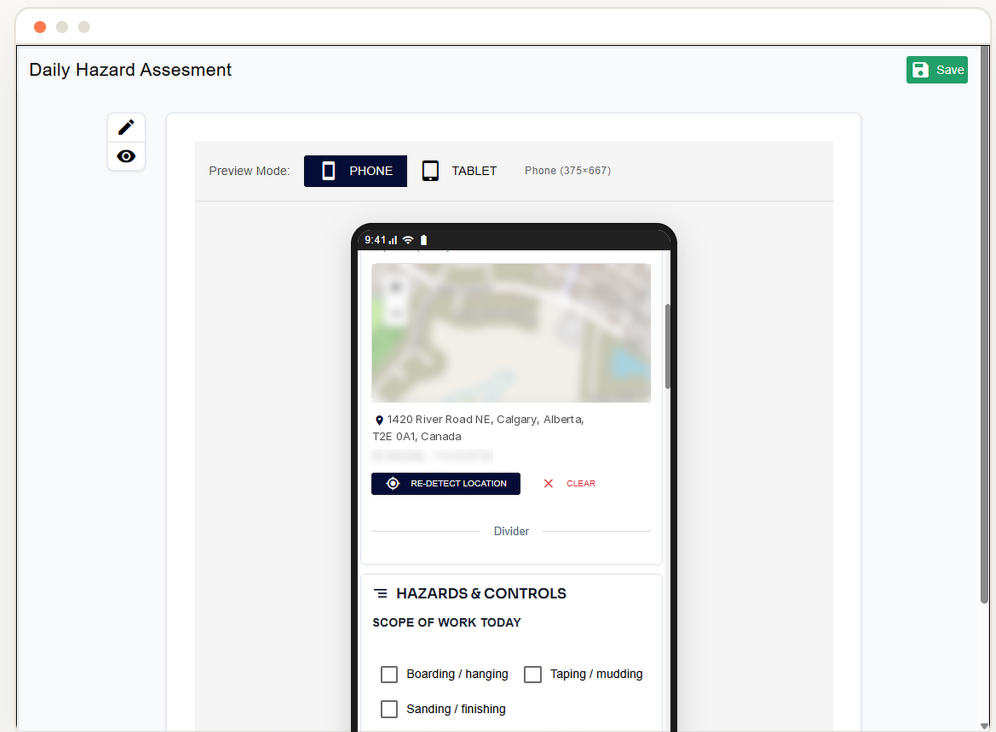
ADMIN

See the form the way your crew will.

- 01 Press the **eye** to switch to Preview.
- 02 Pick **Phone** or **Tablet**.
- 03 Scroll and tap through it: location, checkboxes, photos and all.

TIP

Preview before you deploy. If it's a pain to fill in on a phone, the crew won't fill it in.



06

FORM SETTINGS

SETTINGS

ADMIN

Click an empty spot on the form to open its settings.

- 01 **Form Name and Description.**
- 02 **Form Active** turns the form on or off.
- 03 **Allow users to duplicate submissions** lets the crew copy yesterday's form and just change what's new.
- 04 **Public Access, Approval Settings and Signature Settings**, including whether a signature is required.

The screenshot shows a web application window titled "Form Settings". It has two tabs: "Config" and "Settings", with "Settings" being the active tab. Below the tabs is a section titled "Basic Settings" with a gear icon and an upward arrow. This section contains two text input fields: "Form Name" with the value "Daily Hazard Assessment" and "Description (optional)" with the value "DRYWALL INSTALLATION SCOPE". Below these fields are two toggle switches: "Form Active" which is turned on (green checkmark) and "Allow users to duplicate submissions" which is turned off (blue square with a document icon). Below the "Basic Settings" section are four more settings, each with an icon and a downward arrow: "Public Access" (globe icon), "Approval Settings" (checklist icon), and "Signature Settings" (signature icon).

07

ELEMENT SETTINGS

SETTINGS

ADMIN

Every element, section, column and container has its own settings.

- 01 **Label, Default Value, Placeholder and Help Text.**
- 02 **Required** makes the crew answer it. **Repeatable** lets them add it more than once.
- 03 Each field type has its own settings section. A **Date** field gets **Date Settings**: fill in today's date automatically and pick the date format.
- 04 The **Field Name** locks once a form has submissions, so your data stays lined up.

Field Settings

Config Settings

Label
DATE

Field Name
date_uwqfg

⚠ Has submissions — tap the lock to edit

Default Value
2026/05/31

Placeholder
Select date

Help Text

☒ Required ☐ Repeatable

Conditional Logic

Automations

Date Settings

☒ Use today's date as default

Date Format
YYYY/MM/DD

08

LOGIC AND AUTOMATIONS

AUTOMATIONS

ADMIN

Make the form do the follow-up for you.

- 01 **Conditional Logic:** press **Add condition** to show a field only when another answer calls for it.
- 02 **Automations** run on **Yes / No**, **Select**, **Radio** and **Checkbox** fields.
- 03 **Send an email** when an answer comes in, to a person or a role like Project Manager, with a PDF copy attached.
- 04 **Create an action** on its own: a **Hazard**, **Incident**, **Observation**, **Task**, **Deficiency** or **Maintenance** item.

EXAMPLE

Worker ticks "Working alone". The PM gets an email right away with the form attached.

Field Settings

Config Settings

Automations

Automations + Add Automation

When "Checked (true)" → 1 email

When value equals
Checked (true)

Create Action (optional)

Email Notifications + Add Email

✉ Send Email ✕

Email Subject (optional)
You have a worker on site alone!

☒ Attach PDF copy

Recipients + Add

Type Role Role Project Manager ✕

Layout

Data

Properties

Bas Hazard

Cor Incident

Aut Observation

Aut Task

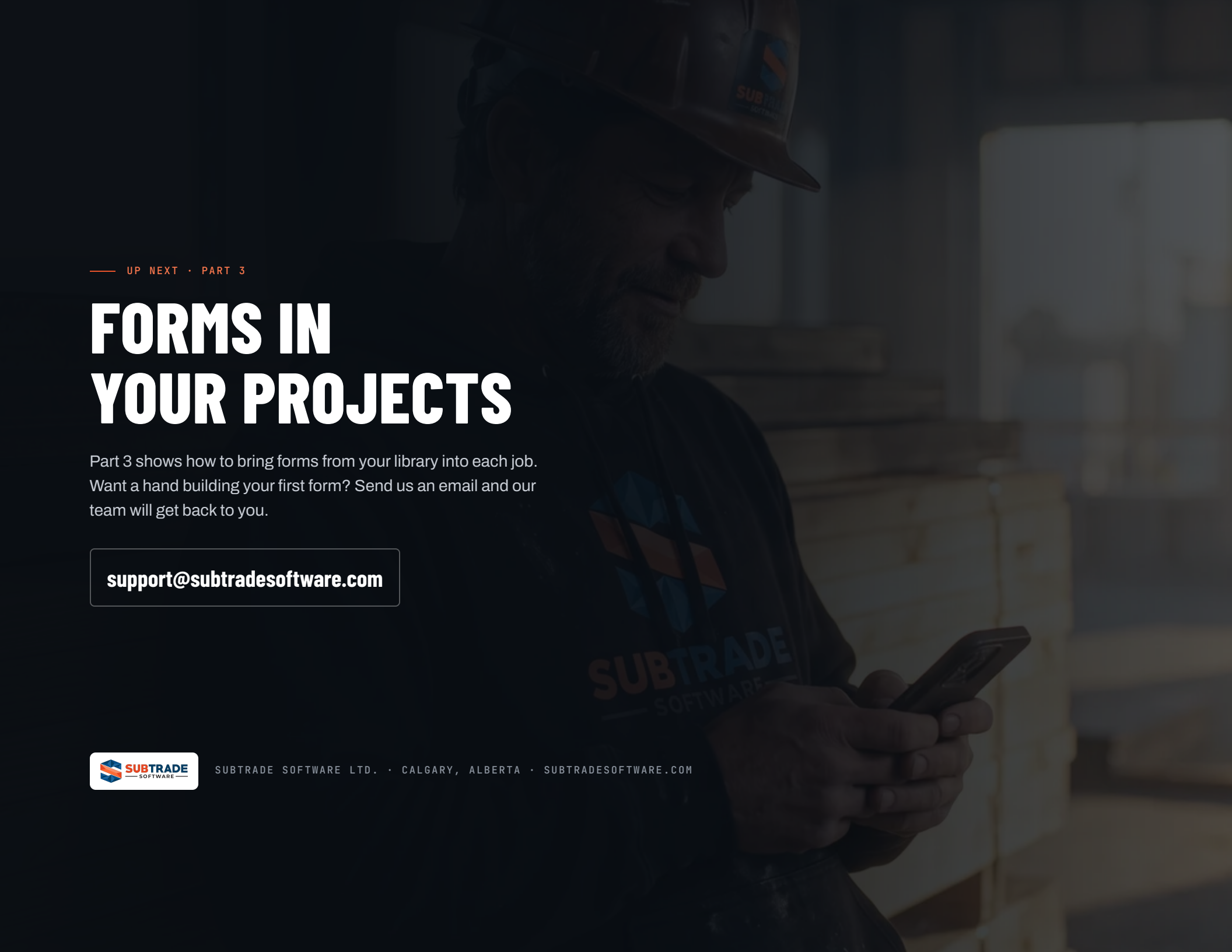
Aut Deficiency

Aut Maintenance

Create Action (optional)

Email Notifications + Add Email

Add an email notification or select an action type to create automatically



— UP NEXT • PART 3

FORMS IN YOUR PROJECTS

Part 3 shows how to bring forms from your library into each job. Want a hand building your first form? Send us an email and our team will get back to you.

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