BLUEPRINT FORM USER GUIDE

2025-06-11

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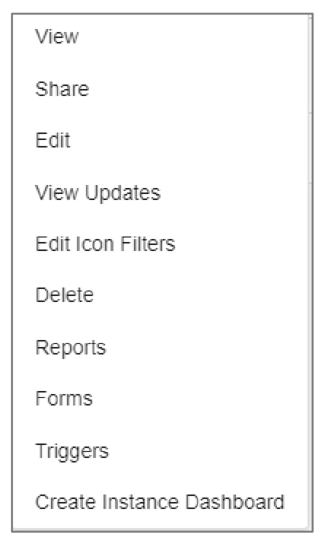
Overview



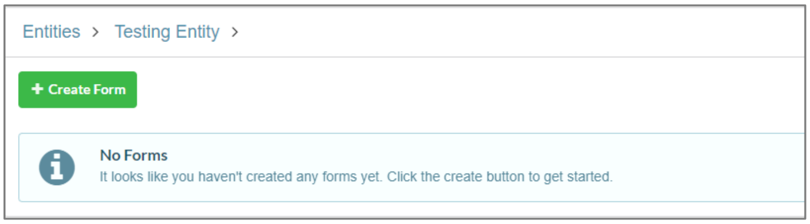
An important part of SimplyCast Blueprint is the robust Blueprint Form module, which allows users to manage and update asset information. This can be accessed in the dropdown menu on an entity-by-entity basis.

Once you have clicked the downward arrow to the right of "View Data", you can click "Forms" to access the Blueprint Form Dashboard.

Please note that operating the Blueprint Form module requires some prior knowledge of the Blueprint app's core functionality. Therefore, we highly recommend the use of the SimplyCast Blueprint Core Guide before engaging with the Form guide.

Blueprint Form Dashboard

To begin creating and managing your Blueprint forms in the SimplyCast platform, first navigate to the Blueprint Form Dashboard as described above.



Once you have done this, the Blueprint Form Dashboard will be displayed. It should look roughly like the image on the left.

From the Blueprint Form Dashboard, you can:

Create a New Form

You will notice a green "Create Form" button at the top left-hand side of the Blueprint Form Dashboard in the Blueprint tab.

This button will open a modal window where you can name your new form. Once this is done, click "Create".

From here you will be directed to a page titled "Form Locales". This is where you input any necessary language settings, including the Unicode locale identifier and a custom name to help you remember which language(s) you have selected for your form. For us, English is the default language, and this will appear automatically configured at the top.

Once you are satisfied with your language settings, click "Next".

Edit a Form

You will arrive on the form builder screen. By default, your form will include a mandatory field for the name of your entity. Additionally, any fields that you have put in your entity will be available as drag-and-drop elements that can be added to the form, allowing you to update the entity information quickly.

Each drag-and-drop element will add a new field that can be updated or changed by filling out the form.

The elements are on the left-hand side. Things like form project settings and submission actions are on the right. You can also find a particular element's settings by clicking on it.

View the List of Forms

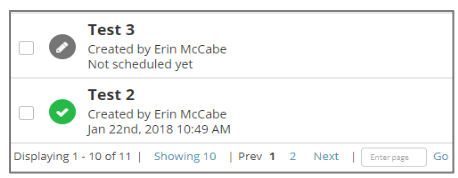
Below the "Create Entity" button, you will see a complete list of your Blueprint entities with the most recent at the top. If there are no entities listed, this means none have been created.

You will be able to see the following information for each listed entity:

- **Entity Name:** The name the creator gave the entity.
- **Description:** A brief definition of what the entity represents (if available).
- **Created On:** The date and time of the entity's creation.
- **Last Modified:** The date and time of the entity's most recent modification.

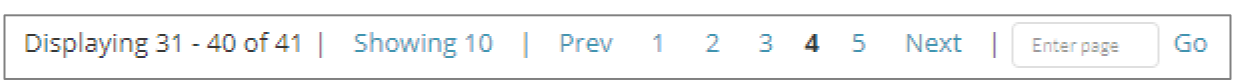
Navigate Multiple Pages of Blueprint Forms

Your entities will appear in a list below the green "Create Entity" button on the Entities page.



To navigate through pages of entities:

- Look for the page numbers at the bottom of your screen.
- Click either the page number or the "Next" button to visit another page of entities. Alternatively, enter the page number in the field to the right of the "Next" button and click "Go" to proceed directly to that page.
- Choose how many entities display at one time by clicking the "Showing…" link to the right of the number of displayed entities.



Search for Blueprint Forms

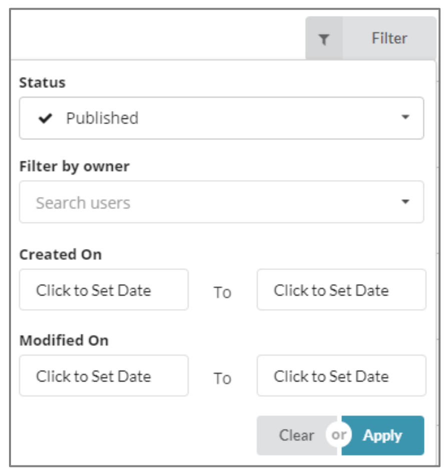
To search for a particular entity:

- Select the search box in the top right-hand corner of the page next to the gray "Filter" button.
- Type in the text you would like the system to search for.
- The list of entities will automatically filter to match the text.

Filter Blueprint Forms

You can filter entities based on their status, owner, and the dates they were created or last modified.

To filter your Blueprint forms:



- Find the gray "Filter" button beside the search bar in the Dashboard at the top right-hand side of your screen.
- Click the "Filter" button to open a menu that effectively functions as a dropdown menu. Use this to filter entities by status, owner, or the dates of the entity's creation and/or modification.
- If you choose to filter your entities by status, a dropdown menu will appear with options to view only entities that have been published, entities that have been deleted, or all entities.
- If you choose to filter entities by owner, a dropdown menu will appear with options to view entities either owned by you or by any other users in your account network.
- You can also filter entities by the date on which they were created or last modified. For each of these options there are "Click to Set Date" fields. Click either box and another dropdown menu will appear with two fields labeled "Date" and "Time". Use these to manually insert the date and time you wish to filter your entities by.
- Use the calendar below these fields to choose the dates you wish to filter from.
- Click the blue "Apply" button to implement the filter or click "Clear" if you do not wish to filter your entities. This will close the dropdown menu.

[**Note:** The normally gray "Filter" button will appear green when a filter has been applied to your entities. To remove the filter, click the "Filter" button again and select "Clear" to remove all filters from your entities.]

Project Settings

Once you have selected and opened a Blueprint Form project, the project settings menu can be opened by clicking anywhere on the gray bar containing its title. Opening the project settings menu will allow you to change:

- The project title.
- The project description.
- The mode of submission. By this we mean that you can decide if submissions to the form can only create new records, only update existing records, or both.

Submission Actions Settings

Here you can choose how data is submitted to the form. This can be done in two ways:

- **Save** is selected by default. This option will submit the form and refresh it as a blank version, ready to be used again.
- **Save** and **View** will display the information just submitted by the user upon filling out the form and clicking the correct button. The buttons can be renamed by using the text fields under the "Button Labels" header.

Note: the "Save" and "View" options are available only if you select "Save and View" as a viable submission action.

Element Settings

These are settings for the various elements that you might use in your form. These settings all appear on at least one element in Blueprint Forms, so it is important to know what they do.

Name: Changes the header for your element and will also change what name users see on the completed form. For example, if I named a Location field "Location Test" in field creation, it would have the same name in the form. However, if I used the "Name" setting within the form editor, I could change that to something else.

Description: Add context or instructions for users to follow as they fill out the form. This can be especially useful for text fields which are restricted to a narrow subset of valid submissions.

Placeholder: Creates a default value in the field. It is important to note that this default value *can* be submitted as a valid response, and that users will have to delete the placeholder before they can correctly respond as intended.

Visibility: Creates elements on the form that are not visible to users. For example, "Generated ID" requires no user input. This makes it a good candidate for being flagged as not visible, as the system will fill it out automatically with each submission and users cannot interact with it.

Read Only: Prevents users from interacting with this field. If your form has auto population rules configured, you will want to ensure that the automatically populated fields use this setting to prevent invalid responses or erroneous information.

Required: Flags a particular element of the form as being required to complete submission. This ensures that all essential information is collected, and no questions are missed.

Entity Default: Displays the default that was set during the entity's field creation process. This setting's visibility indicates that the default cannot be changed on the form and must instead be changed by editing the field within that entity.

Auto Population: Creates conditional if/then statements that will automatically perform certain functions. These functions can vary depending on the element and will be listed in the next section of this guide.

	Name	Description	Placeholder	Visibility	Read Only	Required	Entity Default	Auto Population	Show as Radio Buttons or Checkboxes
Capacity	✓	✓		✓	✓	✓	✓	✓	
Date	✓	✓	✓	✓	✓	✓		✓	
Date And Time	✓	✓	✓	✓	✓	✓		✓	
Dropdown	✓	✓	✓	✓	✓	✓		✓	✓
Dropdown Multi-Select	✓	✓	✓	✓	✓	✓		✓	✓
Email Address	✓	✓	✓	✓	✓	✓		✓	

File	✓	✓	✓	✓	✓	✓		✓	
Generated ID	✓	✓	✓	✓	✓	✓			
Location	✓	✓		✓	✓	✓		✓	
Long Text	✓	✓	✓	✓	✓	✓		✓	
Lookup	✓	✓	✓	✓	✓	✓		✓	
Lookup Multi-Select	✓	✓	✓	✓	✓	✓		✓	
Map Region	✓	✓		✓	✓	✓	✓		
Number (Integer)	✓	✓	✓	✓	✓	✓		✓	
Number (Decimal)	✓	✓	✓	✓	✓	✓		✓	
Phone Number	✓	✓	✓	✓	✓	✓		✓	
Related Entity	✓	✓	✓	✓	✓	✓		✓	
Related Contact	✓	✓	✓	✓	✓	✓	✓	✓	
Related User	✓	✓	✓	✓	✓	✓	✓	✓	
Related List	✓	✓	✓	✓	✓	✓	✓	✓	
Related Account Network Group	✓	✓	✓	✓	✓	✓		✓	

Text	✓	✓	✓	✓	✓	✓		✓	
Yes or No (Boolean)	✓	✓		✓	✓	✓		✓	

Auto Population Settings

Auto population settings dictate how the form behaves. For example, you might want to set a text field to “false” if the user has filled out “No” in an earlier Boolean response element. Auto population allows you to do this.

To access these settings, find the “Auto Population” button on the selected element (provided the element can auto populate). You will be prompted to create an operation. Once this is done, you will have several dropdowns to manage.

An “Action” is the thing you want to happen. The second dropdown will change depending on the Action in question but is also related to the outcome you want to happen.

Next to these two dropdown menus, you will find a button labeled “Add Condition”. This allows you to define the circumstances under which you want the Action to occur. For example, I could create an Operation on the “Number (Integer)” element that increases the count by one each time a specific response on the form is submitted. In this case, the increase in count is the Action, and the specific response in the form submission is the Condition.

Settings you may find in the Auto Population drawer include:

Set: Conditionally change the response for your chosen element. For example, you might use Set in a text field to change the field to “True” if the user has uploaded a file, or if they are a new contact. This could then lead to other conditional logic and automation. Set will always overwrite this element when the condition is met, so you should be certain that it is not an element that you require custom responses to.

Please note that “Set” can appear as just “Set”, “Set (Absolute)”, and “Set (Relative)”. “Set (Absolute)” functions the same as the default “Set”, whereas “Set (Relative)” is a function of date elements that set the date based on the relative condition. This can include “When form loaded”, “Before form loaded”, or “After form loaded” and will set the field to only a date that meets the criteria.

Set to Context:

Copy: Copies the value from another element. A text field that has the "Copy" action selected will copy text from another field elsewhere in the form.

Clear: Automatically delete anything in this element when the condition is met. For example, if someone were to respond to a question in the negative, you could consequently eliminate a prefilled answer later in the form.

Restrict Options to: Available only to certain elements, this element will restrict the user's available options. This can be done based on other responses on the form, ensuring that the dropdown menu only contains relevant options to each individual user. You can select multiple options to be available.

Restrict and Set: Restrict the options a user can see when they fill out the form. This option combines the "Restrict" and "Set" actions from earlier, thereby setting the dropdown to a specific option when the conditions are met and isolating only other valid responses.

Restrict and Clear: As with previous "Restrict" options, the available responses will be limited when conditions are met, and the field will be cleared of any entry.

	Set	Set (Absolute)	Set (Relative)	Copy	Clear	Restrict	Restrict Options To	Restrict and Set	Restrict and Clear
Capacity	✓				✓				
Date		✓	✓	✓	✓	✓			
Date And Time		✓	✓	✓	✓	✓			
Dropdown	✓				✓		✓	✓	✓
Dropdown Multi-Select	✓				✓		✓	✓	✓
Email Address	✓			✓	✓				

File	✓				✓				
Location	✓				✓				
Long Text	✓			✓	✓				
Lookup	✓			✓	✓				
Lookup Multi-Select	✓				✓		✓	✓	✓
Number (Integer)	✓			✓	✓				
Number (Decimal)	✓			✓	✓				
Phone Number	✓			✓	✓				
Related Entity	✓			✓	✓				
Related Contact	✓				✓				
Related User	✓			✓	✓				
Related List	✓				✓				
Related Account Network Group	✓				✓				
Text	✓			✓	✓				

Yes or No (Boolean)	✓			✓					

Crosscheck

Once your form settings have been arranged as needed, you can click the “Next” button at the bottom right of the screen. This will take you to the crosscheck screen, which identifies issues with the form and tells you if it is possible to publish it. Crosscheck operates on a simple green, yellow, and red system.

Green items can be published without problems, yellow items may have some issues and could probably be refined slightly, and red issues will prevent the form from being published at all.