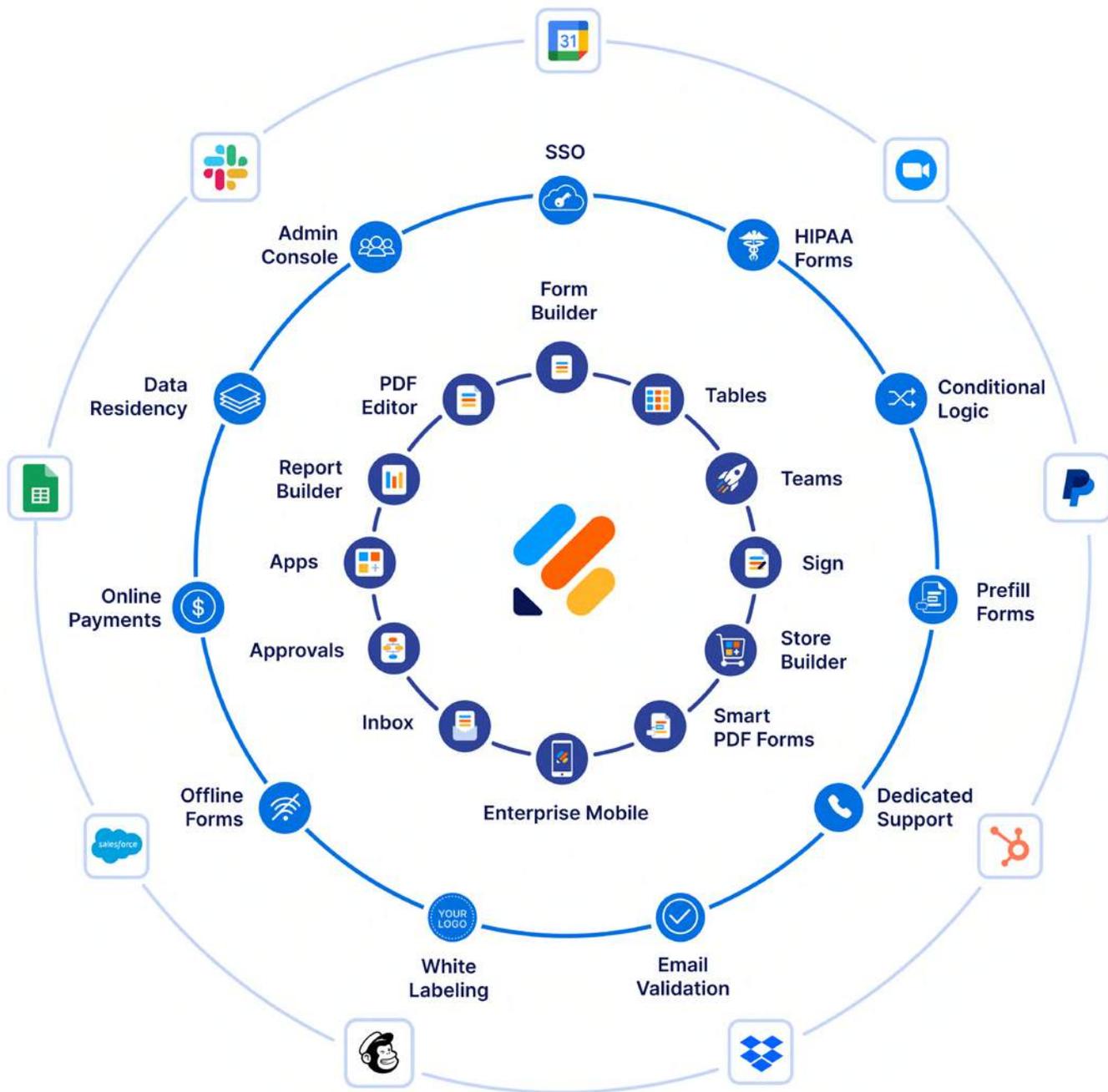




# Powerful forms for teams

The ultimate guide

## The Jotform Enterprise ecosystem of products, features, and integrations



Products

Sample Features

Sample Integrations

# Foreword

I didn't start my career knowing I wanted to run a form software company.

In fact, my relationship with forms got off to an inauspicious start. When I worked as a developer in New York City in the 2000s, I absolutely dreaded them. Forms were tedious to make, even for the most talented developers. But even then, they were necessary for businesses to run efficiently.

So I looked for a shortcut. I figured there must be a service out there that could fast-track the process of creating and publishing forms, something designed for developers like myself who were stuck in the same rut.

There wasn't. And so began my quest to create what eventually became the world's first drag-and-drop form builder.

When I founded Jotform in 2006, I couldn't have predicted that it would be valuable to developers and non-technical people alike, working in various industries around the globe. I didn't envision the suite of products we've developed or the tens of millions of users — from solo entrepreneurs and C-suite executives to multinational companies and organizations around the world.

To say I'm humbled by our growth would be an understatement. Launching Jotform Enterprise was an incredible milestone. This company and serving all the organizations that depend on it are my life's work. That commitment is just one reason why Jotform's internal teams use our product in their daily work. We want our user experience to mirror your user experience.

This book is designed to help you get more from Jotform Enterprise, whether you're new to our products or you've been with us all along. It'll go through the basics of creating forms, cover primary use cases, and explore some of the more advanced features of Jotform Enterprise. You'll even meet some fellow users along the way.

We hope you find it useful, and thanks for using Jotform Enterprise.

**—Aytakin Tank, Founder and CEO of Jotform**

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## Chapter 1

# Why Jotform Enterprise?

Data is the lifeblood of every organization. You can use it to inform new products and customer personas, analyze costs and return on investment, and measure the efficacy of your mission or culture. But to maximize the value of your data, you need to be able to effectively and securely capture, access, manipulate, and share it.

In some cases, access to information can be life-changing. At a time when one in 13 Canadians has an eating disorder, and the wait for basic intervention can take up to two years, Body Brave is on a mission to provide accessible eating disorder treatment and support while advancing community training and education.

Using Jotform Enterprise, the team at Body Brave built custom forms with conditional logic that streamlined access to tailored treatment plans and enabled collaboration with like-minded organizations — meeting the ultimate goal of providing comprehensive care solutions.

What's more, leveraging a HIPAA-configured server, Body Brave could protect sensitive patient information and publish its work, contributing data to much-needed research that informs advances across the continuum of care.

In addition, using the suite of intuitive, no-code solutions available on the Jotform Enterprise platform — including Tables, Apps, Report Builder, PDF Editor, Workflows, and Jotform Sign — Body Brave benefitted big-time, saving staff five hours per week and replacing five different platforms across the organization.

While standard Jotform plans are perfect for individuals or smaller operations with a single person managing data and forms, Jotform Enterprise can power your entire organization. You'll benefit from several feature enhancements that accommodate multiple users and the secure sharing of data, as well as Enterprise-specific elements that support user and data management at the organization and team level. Let's take a quick look at all things Jotform Enterprise.

## Security to meet the highest standards

Jotform Enterprise combines industry-leading security with collaboration features to protect your data and minimize silos.

Confidently power your teams with the following:

- 256-bit SSL (Secure Sockets Layer) connection that uses a SHA256 certificate
- PCI DSS Service Provider Level 1 certification
- GDPR, CCPA, HIPAA, FERPA, and SOC 2 compliance solutions
- Single Sign-On integrations for maximum security and efficiency
- Local data residency centers to host your data and meet geolocalization needs
- Role-based access to secure sensitive data and share important information
- Administrative controls to manage users, teams, forms, and submission data
- Two-factor authentication to counteract compromised passwords

Jotform Enterprise customers benefit from local data residency centers, which create an extra layer of security and optimize the user experience. We also offer Service Level Agreements (SLAs) and a dedicated customer support team to help you make the most of the platform.

To further secure your data, we partner with several Single Sign-On providers, including Microsoft, Google, Okta, Duo, and OneLogin, so you can authenticate the individuals accessing internal forms and data. Using a single set of login credentials also streamlines workflows for greater efficiency.

Jotform knows that some organizations need data security that meets specific government standards. With that in mind, we offer Jotform Government, our most secure solution yet.

## Jotform Government

Jotform Government is built for organizations that need powerful forms and automation as well as enhanced and independently audited security protocols to meet government standards.

Jotform Government has all the power, security, customizability, and flexibility of the Jotform Enterprise platform, plus heightened security measures featuring data storage in a FedRAMP-compliant data center.

This is ideal for state, local, and education (SLED) organizations such as

- City or county government agencies
- Large government institutions serving entire states
- Universities and educational institutions receiving state funding

Additionally, Jotform Government is listed on the StateRAMP authorized product list as a progressing SaaS provider, and Jotform is enrolled in StateRAMP's Progressing Snapshot Program.

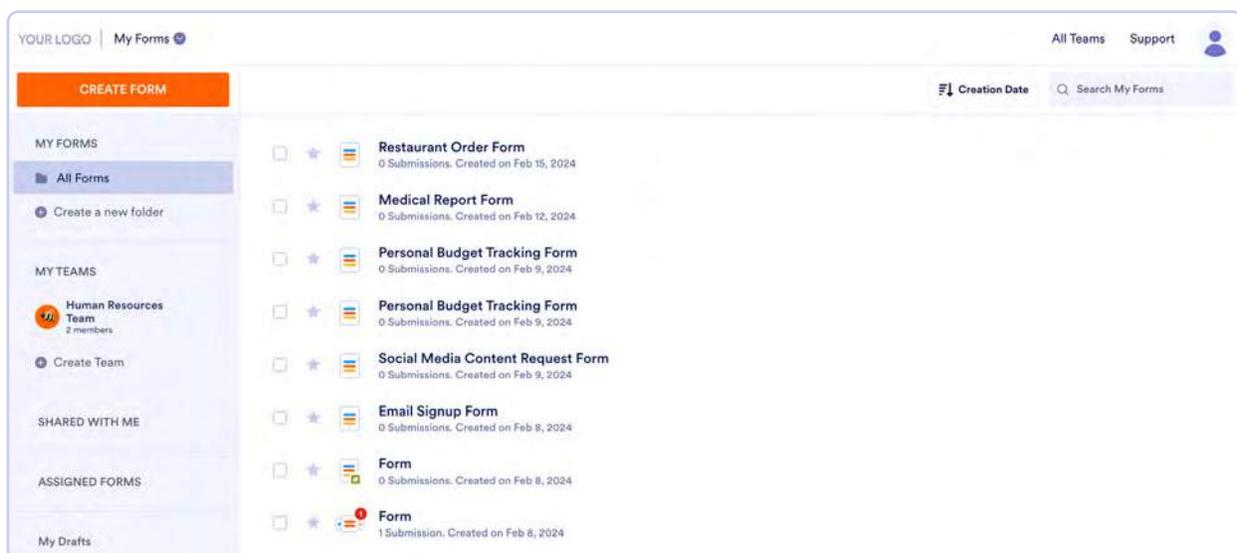
Many government agencies are playing catch-up to deliver the convenient online experiences people expect in their daily lives. But providing a streamlined customer experience in government is easier than some may think, and it can alter the typical perception of government agencies.

While some assume government organizations are inefficient and frustrating, yours can be modern and approachable with Jotform Government. And you'll have peace of mind provided by advanced security tailored just for you, plus all the tools of Jotform Enterprise.

## Customization

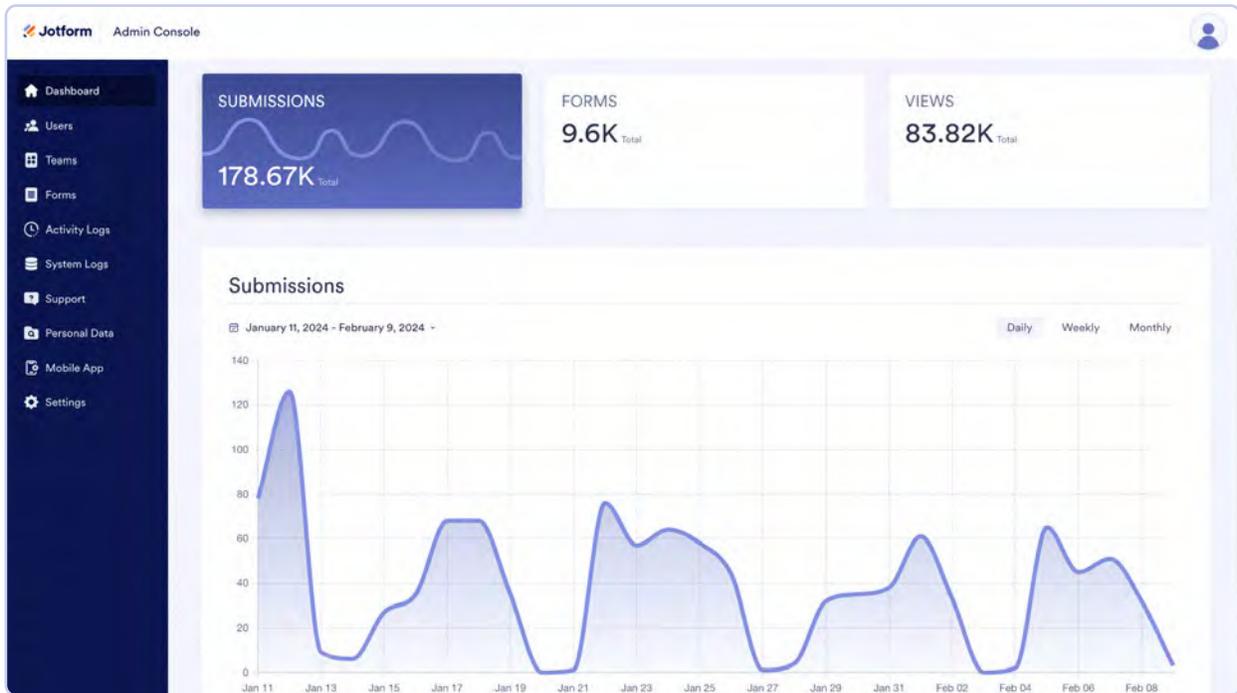
Jotform Enterprise offers white labeling, so you can create and share templates with predefined brand colors, add logos and favicons, and create custom URLs to meet your organization's brand standards. Say goodbye to Jotform branding on your forms and let your domain take center stage. The possibilities are limitless.

With unlimited users, teams, forms, submissions, signed documents, and more, there are many reasons to choose Jotform Enterprise. Speaking of, have you heard about the Admin Console?



## The Admin Console

The Admin Console is your one-stop shop to manage all your users, teams, forms, and data. From the dashboard, you can quickly see trends in submissions, forms, and views by day, week, or month.

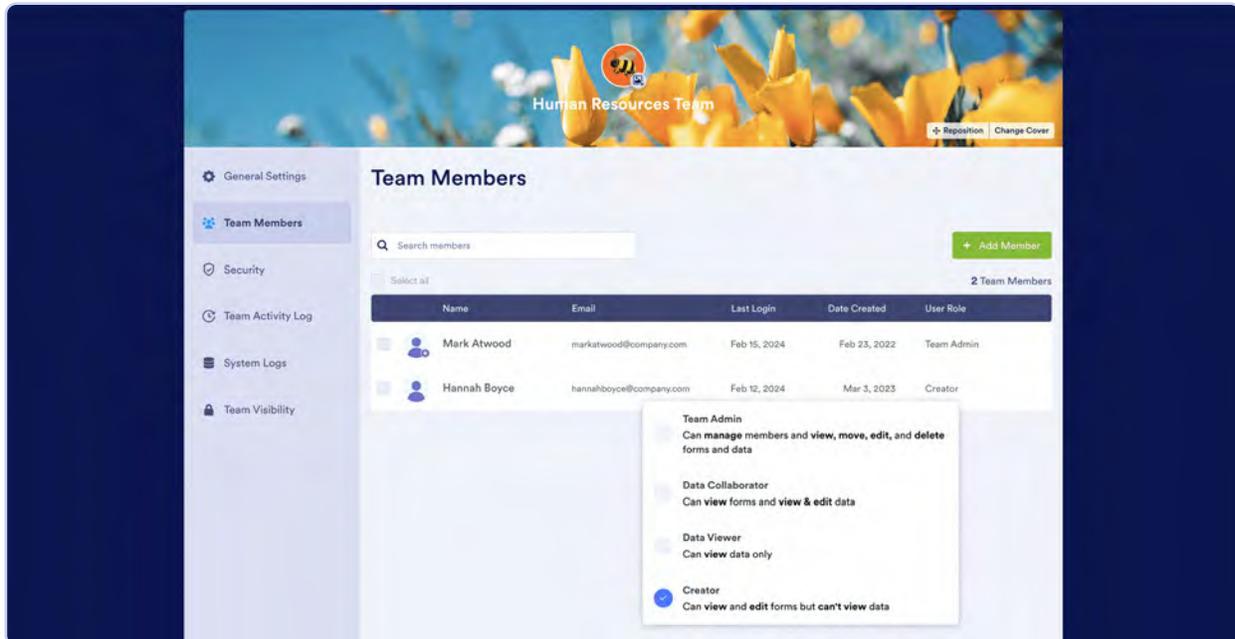


You can manage teams and users, making quick adjustments to data access and form assignments as your organization's needs change.

The screenshot shows the 'Jotform Teams' section of the Admin Console. It includes a search bar for teams, a '+ Create Team' button, and a '482 Teams' indicator. Below is a table listing various teams with their details.

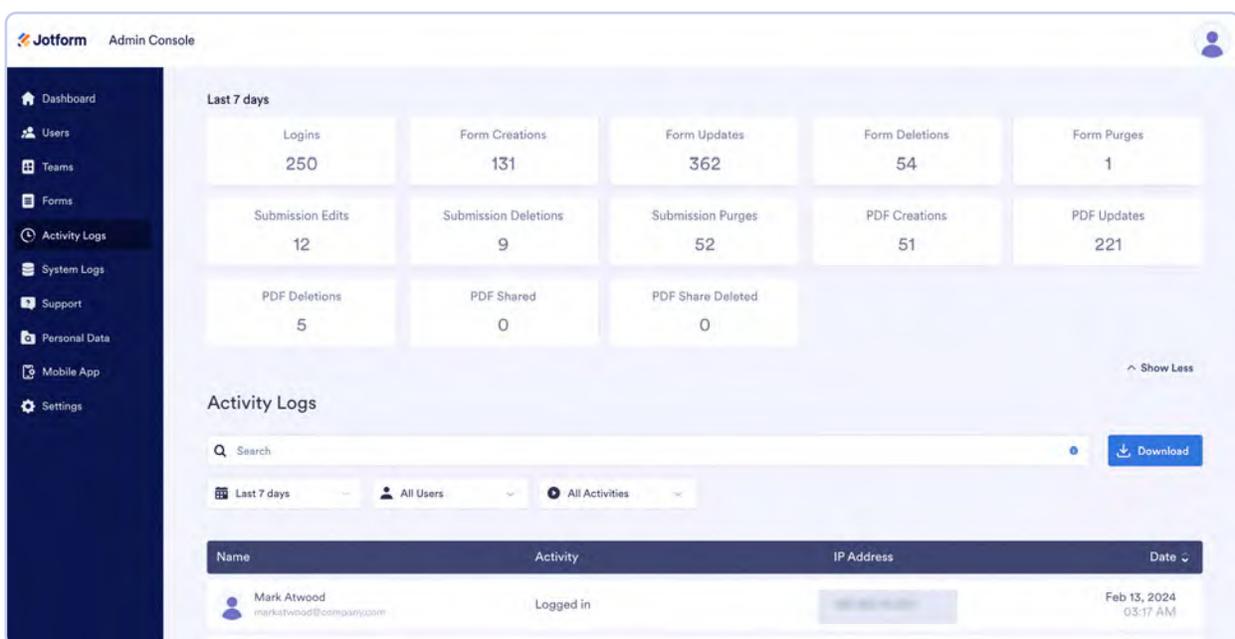
| Team           | Members | Privacy           | Created By       | Date Created |
|----------------|---------|-------------------|------------------|--------------|
| Marketing Team | 2       | Organization Only | Alex O'Neil      | Feb 11, 2024 |
| Growth Team    | 1       | Organization Only | Amber Smith      | Feb 11, 2024 |
| Revenue Team   | 1       | Organization Only | Oscar Himenez    | Feb 9, 2024  |
| Content Team   | 1       | Organization Only | Norman Farell    | Feb 9, 2024  |
| Designer Team  | 1       | Organization Only | Nancy Stuart     | Feb 9, 2024  |
| Product Team   | 1       | Organization Only | Melissa Nash     | Feb 9, 2024  |
| Finance Team   | 1       | Organization Only | Mary Houston     | Feb 8, 2024  |
| HR Team        | 1       | Organization Only | Jessica Stanford | Feb 8, 2024  |

Accommodating vacations, new hires, and staffing changes is a snap. Add, remove, or edit the role-based access for team members via the Admin Console or by accessing the settings within a team workspace. You can also assign team admins to manage team members and roles, providing greater autonomy and improving efficiency.



Create admins who have either organizational or team oversight to streamline user management and resource allocation. Both admin types can monitor team activity and adjust team visibility.

In addition to tracking and managing users, the Admin Console lets you view and download reports on platform activity with options to filter results by time frame, user, or activity type.



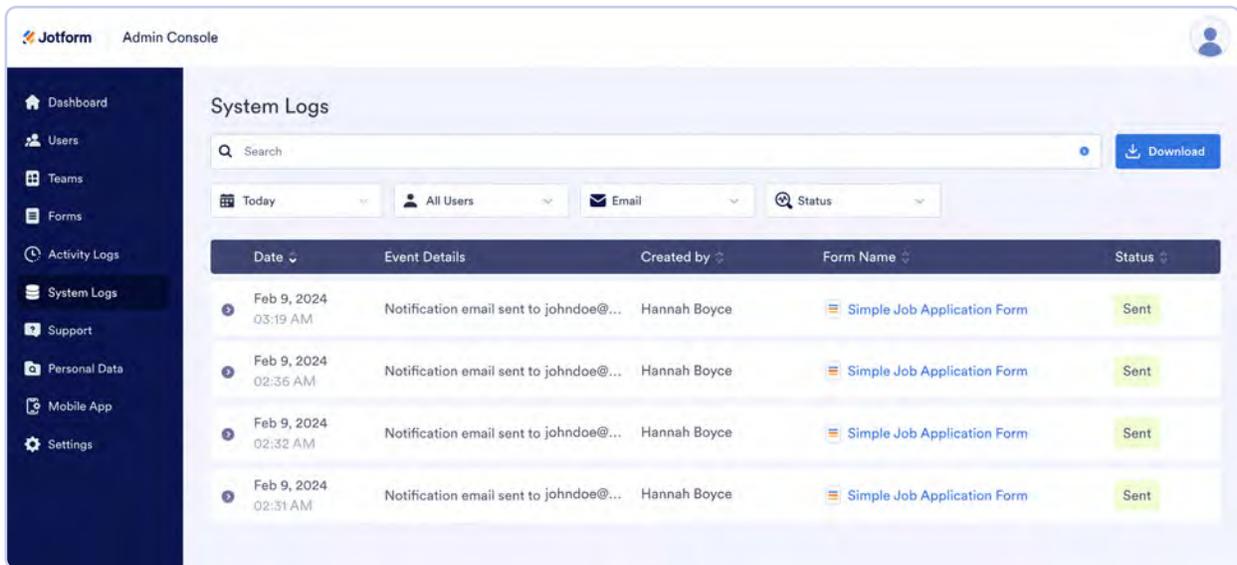
Jotform's robust platform includes hundreds of integrations and widgets to extend the functionality of your forms. Depending on your organization and user base, you may wish to restrict what's available to your users. Fortunately, admins can [tailor the list of available widgets and integrations](#) by simply toggling them off or on.

## Supporting remote work and mobile access from the Admin Console

If your work has you on the road, or where internet connections are unreliable, you can use the Jotform Enterprise Mobile App to stay informed and collect data offline.

Invite users to download the app with auto-generated links and emails from the Admin Console. You can also use the Admin Console to monitor app usage, the versions running on user device types, and more.

Additionally, from the System Logs, you can monitor the user experience and confirm systems are running as expected.



The screenshot displays the Jotform Admin Console interface. On the left is a dark blue sidebar with navigation options: Dashboard, Users, Teams, Forms, Activity Logs, System Logs (highlighted), Support, Personal Data, Mobile App, and Settings. The main content area is titled 'System Logs' and features a search bar, a 'Download' button, and filters for 'Today', 'All Users', 'Email', and 'Status'. Below these is a table with the following data:

| Date                    | Event Details                          | Created by   | Form Name                   | Status |
|-------------------------|--|--------------|-----------------------------|--------|
| Feb 9, 2024<br>03:19 AM | Notification email sent to johndoe@... | Hannah Boyce | Simple Job Application Form | Sent   |
| Feb 9, 2024<br>02:36 AM | Notification email sent to johndoe@... | Hannah Boyce | Simple Job Application Form | Sent   |
| Feb 9, 2024<br>02:32 AM | Notification email sent to johndoe@... | Hannah Boyce | Simple Job Application Form | Sent   |
| Feb 9, 2024<br>02:31 AM | Notification email sent to johndoe@... | Hannah Boyce | Simple Job Application Form | Sent   |

## Support and Professional Services

As an Enterprise customer, you benefit from a dedicated Customer Success team that supports your goals and provides you with exceptional service. You can contact the team from the Support tab, submit new requests, schedule Zoom meetings, or view ticket history.

Professional Services are also available to Enterprise customers. They provide a great way to jump-start new initiatives, promote user adoption with expert-led training, and streamline integrations by outsourcing form and workflow creation.

## Empowering teams organization-wide

For decades, those who knew how to code harnessed the power of automation. Technology solutions were expensive and accessible only to firms with the resources to deploy them.

Now, no-code solutions have brought the power of technology and automation to the masses.

“Organizations that run largely on donations and government funding (nonprofits, education, NGOs) now have the same tools that the tech giants have, but at a fraction of the price.”

— Ayyoub Ajmi, Founder, **CiviLaw.Tech**

Jotform Enterprise empowers your entire organization to

- Build online forms with conditional logic and custom branding
- View, analyze, and manage submission data
- Create custom-branded apps and mobile forms
- Design and automate reporting and workflows
- Convert paper forms into polished PDFs
- Collect e-signatures and payments

And anyone can do all of this without coding. The intuitive, drag-and-drop Jotform Enterprise platform makes it easy to create solutions that meet a variety of needs.

“Jotform Enterprise makes users feel empowered, self-sufficient, and that they can’t mess anything up. It’s ideal. Nobody wants help with everything; most people want to do things independently.”

— Becky Dudley, Database Manager, **United Way of Roanoke Valley**

No organization is immune to the cyclical nature of markets and broader socioeconomic environments. Maximizing efficiency and minimizing costs helps organizations weather market fluctuations.

Digitizing your organization’s forms and data makes data more accessible, improves turnaround times, and helps build a more sustainable business. Transitioning from paper-based processes creates a cascade effect that supports sustainability by enabling remote work, using less paper, and minimizing the need for toner, printers, filing cabinets, shredders, recycling services, and more.

Jotform Enterprise has helped organizations around the world optimize their data collection and management. Whether you work in healthcare, education, government, financial services, retail, or the nonprofit sector, you’re certain to find relevant tips and strategies in this book.

It’s time to explore all the basics of Jotform Enterprise, from forms and submissions to server setup and security, to automation and admin-level management. Let’s go!

## Chapter 2

# Why online forms?

You may be wondering, Why all this fuss about online forms? Is it that big a deal? Honestly, yes, it's a huge deal. Switching from paper to online forms transforms how organizations operate.

Collecting data digitally — rather than via paper-based processes — means your organization can access that data and put it to work immediately, which leads to more tailored customer experiences and more informed business decisions.

Digital data collection also allows you to pre-populate information you already have into your forms, which can speed form submission, increase conversion rates, and result in cleaner data. Additionally, you can use form submission data to generate PDFs that match forms required by vendors, government agencies, or regulatory bodies, saving time on the back end.

The world is increasingly populated by digital natives who expect to complete everyday tasks with an app or online in a few clicks. Millennials and Gen Zers are bringing these same expectations to their workplaces.

Replacing paper forms and inefficient online experiences with streamlined digital forms can reduce abandoned carts, increase donations, and expand audiences. In addition, Jotform Enterprise's no-code Form Builder encourages employees to create their own solutions, enables secure data collection and reporting, and provides opportunities to collaborate on strategic efforts, increasing productivity and job satisfaction.

With the interconnected, no-code, drag-and-drop solutions available on the Jotform Enterprise platform, employees of all technical abilities and comfort levels can easily build forms, share them across channels and devices, and use them to kick off approval workflows, enhancing the experience for customers and backend users.

Switching from manual to digital information collection in healthcare not only eases the burden of onboarding new patients but also gives healthcare workers immediate access to critical information and more time to dedicate to quality care.

“Using Jotform Enterprise makes the patient intake process faster and eliminates human error. By making form fields required and using conditional logic, we can efficiently capture all the data we need.”

— Kayla S., **Honor Health Network**

The benefits also extend to your bottom line. With online forms, you can reduce costs tied to paper, printing, storage, and recycling. Leveraging Jotform Sign in your online forms can reduce the need for single-purpose, third-party e-signature providers. Some Enterprise clients have even mitigated the costs of CRM systems and seats by using Jotform Enterprise instead. Look for form widgets that enable appointment booking, payment collection, email validation, inventory management, and more to help you engage customers and manage their data.

So why online forms? Because your organization is too important to run inefficiently.

Getting the correct information efficiently guides everything, from product/service feedback to development and growth to customer service and satisfaction. That’s why effective information gathering is so important.

## How online forms unlock your creative potential

Not only can online forms save you valuable time, but they can also unlock your creativity. Let’s explore how you can think differently about getting things done and positively impact your organization.

Online forms can collect solicited or unsolicited information to meet your organization’s needs and further its growth. Groups you may want to gather information from include

- Customers
- Students
- Donors
- Citizens
- Patients
- Peers
- Employees
- Contractors
- And more

In practical terms, organizations need a smart and flexible way to record the orders, feedback, and data coming their way. The best way to do that is through a templated form that works on any device and streamlines your workflow in an organized way.

You may be wondering what we mean by streamlining a workflow in an organized way. Well, data is only as good as how you put it into practice. Whether you're gathering customer orders, scientific research, or anything in between, you need to determine the larger trends the data is telling you so you can act on it.

A robust platform allows your entire organization to organize, analyze, engage with, and easily report on the data you gather via online forms. This holistic approach to using forms allows you to take advantage of your data in creative ways. Here are just a few suggestions:

- Use summarized data to improve internal product development, workflows, sales processes, and/or customer service.
- Share data with your customers in engaging ways that simultaneously build trust and create organizational transparency.
- Analyze your data to better understand your audience and adjust your approach to meet the needs of unanticipated groups and demographics.

How do Jotform Enterprise customers achieve the insights mentioned above? By flowing their data through natively connected platform solutions.

“With Jotform Enterprise, we can leverage broad and targeted patient satisfaction surveys for specific programs and use cases to learn what’s going on while we deliver care in a near real-time fashion. It’s super valuable.”

— David Kinzler, Chief Executive Officer, **One to One Health**

## Online forms: A move toward sustainability

Well into the 21st century, you’d be surprised how many businesses, organizations, government entities, and institutions still use paper forms. Unfortunately, using paper forms is unsustainable. Want to know why? In short, deforestation and climate change.

But putting that aside, using paper today means your organization’s data is unsafe (i.e., papers that contain sensitive health, banking, etc., information lying about where anyone can see them) and expensive (paper, printers, ink, and machine maintenance).

In addition, paper makes your workflow more time-consuming (producing, filing, and finding physical documents) and inefficient (papers might not be available when needed and could be inaccessible if stored offsite).

The good news is that technology has leveled the playing field. Thanks to widely available no-code solutions, everyone can use secure and environmentally friendly online forms to collect data. Plus, you can convert your organization's paper forms into online forms (including PDFs), making data management and sharing much easier.

Finally, and maybe most importantly, online forms allow you and your team to collaborate on your data in a streamlined way, increasing productivity while eliminating the need for paper.

“The first form I created was converted from paper using the PDF Editor to superimpose the online form onto our existing form language. When I needed to update the form, I thought it would be a nightmare. It took four clicks.”

— Bill Coller, Business Development Manager, **Orthollinois**

## The most popular uses for online forms

What are online forms best used for? The list is endless! There are probably as many forms and surveys as there are stars in the sky — and more are needed every day.



## How different industries benefit from online forms

Want to understand how to best use online forms? Start by examining individual use cases. Below are examples from Jotform Enterprise customers in various industries. See how they approach data collection and management through online forms.

### Education

Hogeschool van Amsterdam (Amsterdam University of Applied Sciences) provides technical training, educational programs, and access to many research opportunities. The institution needed a form solution that could scale across the university's digital channels to help staff accomplish critical tasks associated with the classes they offer and teach.



Before using Jotform Enterprise, program manager and team lead Denicio Hilman used a form tool embedded within the university's content management system (CMS). But it was cumbersome and had limited features and user experience issues that caused internal and external frustration.

With Jotform Enterprise, staff discovered a form builder that was easy to use, feature-rich, and flexible enough to accommodate the university's programs. Jotform Enterprise also complied with EU privacy standards like the General Data Protection Regulation (GDPR).

Jotform Enterprise has enabled greater adoption as more and more staff members come on board. One group of colleagues designs templates and prepares forms, while another uses those templates and forms to invite students, colleagues, and coworkers to events, as well as manage form submission data.

"We see a trend of staff adopting Jotform," says Hilman. "More and more staff are using the templates and forms for their classes and events, and we're looking forward to using Jotform more extensively."

## Healthcare

Serving more than 8,000 patients every week, Honor Health Network is a home healthcare agency specializing in community engagement and top-tier patient care. To deliver in-home care, its staff needed a form solution to work seamlessly on mobile devices.



Mobile forms from Jotform Enterprise allow Honor Health Network's nurses and home aides to quickly and easily collect important patient health information from anywhere. Using tablets for mobile form-filling, users can open a link, fill out their information, and send it in. The straightforward process makes it easy for those who aren't very tech-savvy and gives nurses and home health aides more time to focus on providing care to patients.

With Jotform Enterprise, Honor Health Network has created 500-plus online forms, collecting over 190,000 monthly submissions. The organization has also streamlined its internal hiring processes, leveraging prefill and conditional logic. The result? Applications that included 12 to 20 forms and required the applicant's name and signature on each page now require the applicant to enter their name and signature just once.

Honor Health Network service center manager Kayla S. sums it up nicely: "We Jotform everything."

## Government

The city of Chandler, Arizona, uses Jotform Enterprise to serve its community and employees. The annual retiree open enrollment process, which previously required 700-plus paper forms and countless hours of mailing logistics, now uses a single online form with submission data automatically logged in Jotform Tables.



The open enrollment form has 134 different conditions to show or hide form fields, ensuring that respondents see only the information pertinent to them. On the back end, the forms are just as impressive, with many connected to automated workflows.

The City of Chandler has also leveraged Jotform Enterprise's automated Report Builder to further streamline internal processes, such as its employee of the year nominations, wellness program, and benefits surveys.

After sending a survey to other municipalities to find out which benefits they offer, human resources manager Fernanda Acurio used the Report Builder to present the data to the HR director and city manager. Thanks to automation from Jotform Enterprise, putting the presentation together was “super easy.”

## Retail

After purchasing a chain of steak restaurants in London’s West End in 2003, restaurant organization ATFC, Ltd. expanded and developed several new restaurant brands throughout London. In total, the organization employs about 500 staff and serves 12,000 visitors from all over the world each week.



Managing the operations of just one restaurant can be daunting. Using Jotform Enterprise, ATFC’s distributed staff and restaurant managers successfully record and track a smorgasbord of data, including

- Job applications, trial shift management, and reviews
- Timesheets, attendance, tips, and pay raises
- Accident and incident reporting
- Risk assessment training
- Temperature control logs
- Monthly audits and site inspections

The icing on the cake is the ability to leverage white labeling to customize logos and create tailored experiences for guests across every restaurant. So satisfying!

## Nonprofit

The Arbor Day Foundation is the largest nonprofit membership organization dedicated to planting trees, with more than 1 million members, supporters, and valued partners.

The organization's webmaster took full advantage of the white-labeling and custom CSS options in Jotform Enterprise, creating a boilerplate with all the CSS and primary form fields she wanted. Anytime a form is requested, she simply removes what isn't needed and adds any additional styling. The organization now has more than 265 consistently branded forms that support event registrations, giveaways, mailings, renewals, appeals, tree plantings, liability waivers, and more.

The Arbor Day Foundation staff found more ways to streamline processes. They began using form integrations to manage webinars and payment processing. In addition, they used the translation tool to translate their waiver into Greek for a project near Athens.

The shift to online forms also helps the Arbor Day Foundation increase security and live its mission. Obviously, reducing the need for paper forms is good news for tree enthusiasts. With Jotform Enterprise, the Arbor Day Foundation now takes reservations for its signature Lied Lodge via an online form, so credit card numbers no longer need to be written down, shredded, or securely recycled. It's a win-win.



## Technology

Vancouver-based technology firm iTOTEM collects, processes, and simplifies large pools of data to provide clients with useful, actionable insights from raw datasets.

Tasked with deploying online forms for client data collection, iTOTEM looked to Jotform Enterprise for lightning-fast form building, data-flow automation, team asset organization, and more. The result? The organization has achieved a 17 percent time savings on setting up a form and 25 percent time savings on processing data.



To continually iterate and keep forms organized, iTOTEM uses Jotform Teams. Everything staff creates using Jotform Enterprise is stored in a single Jotform Teams workspace, with folders for each client and subfolders for each client's projects. Individual team members experiment with and create their own forms on their personal workspaces and then share them for review. Once reviewed and approved, the form is migrated to the shared team folder using the Admin Console.

## Athletics

The University of Michigan is recognized as one of the top-ranked public colleges in the United States. Its Athletic department, boasting dozens of national championships and hundreds of Big Ten conference titles, comprises approximately 350 staff members with 940 student-athletes distributed across 27 teams.



Ironically, one of the big names in forms wasn't powerful or nimble enough for this athletic powerhouse, so the University of Michigan turned to Jotform Enterprise. Staff leverage the platform like champions, using forms that touch every single department and maximizing the use of every feature with

- [Tables](#) to share and collaborate with others in the department
- [PDF Editor](#) to create receipts and invoices
- [Smart PDF Forms](#) for PDF conversion and conditional formatting
- [White labeling](#) to make custom-branded forms
- [Autoresponder emails](#) to automate email messages based on form submissions
- [Multiuser capabilities](#) and the [Admin Console](#) to allow other users within the department to create forms and manage different processes
- Jotform's [Authorize.net integration](#) to process payments for stadium tours, facility rentals, banquets, and other sports-related events

In the following chapters, you'll learn how Jotform Enterprise can save you time and money and perhaps even help you gain a competitive advantage. We can't wait to see what you create.

## Chapter 3

# Setting up your server

Every organization has unique needs for both data and security. Fortunately, Jotform Enterprise offers solutions to meet your security needs, whether that's the location where your data is stored or the layers of security protecting it.

You can choose from our standard level of protection or request to be provisioned in our SOC 2 server environment, which is also a HIPAA server. As a Jotform Enterprise admin, you can even choose where your data is stored to comply with local data privacy rules.

When it comes to security for individual users, admins can enable single sign-on (SSO) logins for users in the organization. Integrations with several single sign-on providers like Okta, OneLogin, or Windows can add another layer of security. In addition, administrators have complete oversight of all forms and personnel with the Admin Console.

When you upgrade to Jotform Enterprise, you won't have to compromise the look and feel of your forms because the platform offers white labeling. So you can keep your logos, branding, and URLs to create a seamless customer experience.

If that sounds like a lot of new features for your team to learn, consider enlisting [Jotform Enterprise Professional Services](#) to make your onboarding process a breeze.

## Migrating your data

There's not much work you have to do to migrate your data to Jotform Enterprise. When you upgrade from a Bronze, Silver, or Gold plan, Jotform takes care of most of the migration process for you.

There are two options for migrating your data to a Jotform Enterprise server. You can have your data migrated during the server creation process so everything is there waiting for you the first time you log in. If you would like to use this option, simply let your business development manager know.

Alternatively, if you would like to schedule your data migration for a later date or time, you can submit a manual ticket to request the migration. You can also submit a ticket to request help migrating any additional forms that were created after your initial migration.

When [submitting a ticket](#), include the following information:

- The date and time you would prefer the migration take place (Tickets must be received at least two business days before the requested migration date.)
- The email address for the standard Jotform account that will be migrated
- The email address of the form owner on your Enterprise server
- The forms you wish to migrate (Alternatively, you can request that all forms on the account be migrated.)
- If a full account isn't being migrated, or if forms will be migrated to multiple different user accounts on the Enterprise server, a list of all the form URLs or form IDs you would like to be migrated

For the most part, all your data and integrations will be there after migration. But there are a few things to keep in mind:

- If you use [Dropbox](#), [Zapier](#), [OneDrive](#), [Salesforce](#), or [Power Automate](#) in any of your forms, you'll need to set up those integrations again.
- Encrypted forms will not migrate, so you'll have to disable the encryption before migration.
- Your API end points will change, so plan accordingly.

Check out [Jotform's Migration FAQ](#) to learn more about migrating your data.

## Local data residency centers

As a Jotform Enterprise customer, you can choose the physical location of your local cloud data residency center and host your data in any part of the world. This is especially important for complying with data privacy rules and location requirements in places such as Australia, Canada, the U.K., and the EU.

Whether you decide to keep your data server close to home or to your audience, you'll enjoy better security, reliability, and site latency. Only users and admins within your Enterprise account will be able to access your server.

Renee Hol at the Amsterdam University of Applied Sciences loves using Jotform for this very reason. Jotform is a one-stop shop for all his organization's needs.

“When we implement new applications, we do an information, security, and privacy workshop. The team needed to confirm that Jotform Enterprise complied with standards for the European Union (EU) and the Netherlands, including storing data locally (local data residency). The rules are always changing, so security and privacy are a priority. Jotform Enterprise was able to meet all of our needs.”

— Renee Hol, Webmaster, **Amsterdam University of Applied Sciences**

## A trillion reasons to prioritize compliance

Ensuring your organization complies with local data privacy rules could save a lot of money. Over the last 10 years or so, countries around the world have instituted increasingly stringent data privacy laws. Overall, this is a good thing because increased data privacy means your customers' data will be more secure.

But these data privacy laws mean more fines for companies that don't comply. Amazon, for example, was fined \$887 million in 2021 by the Luxembourg Data Protection Authority for violating the General Data Protection Regulation (CNBC).

Additionally, the data you store could be a gold mine for hackers. In fact, cybercrimes are expected to cost companies \$10.5 trillion by 2025 (Morgan, 2020). Those costs include the destruction of data, stolen money, and disruption to companies — not to mention the cost of a damaged reputation.

## How Jotform Enterprise supports compliance

One of the bigger roadblocks to complying with local data residency laws is a lack of resources. A survey from the World Economic Forum (2022) found that 59 percent of organizations may find it challenging to manage cybersecurity incidents because of a shortage of technical skills among staff.

Luckily, local data residency and other security best practices are built into Jotform's Enterprise solution. All you have to do is work with your business development manager to ensure your data is stored where you want it.

## Servers to accommodate HIPAA and SOC 2 compliance

Enterprise customers can request to have their servers provisioned in our System and Organization Controls (SOC) 2 Type II-compliant environment. This allows you to deploy custom forms and apps on a system that complies with these controls.

### What is SOC 2, and how does it enhance security?

Developed by the American Institute of Certified Public Accountants (AICPA), the SOC 2 framework is an internationally recognized security compliance standard for Software-as-a-Service (SaaS) companies.

Achieving compliance requires a technical audit, which independently verifies that Jotform Enterprise has not only established but also follows strict information security policies and procedures encompassing the 5 Trust Services Principles (TSP) defined by the Assurance Services Executive Committee of the AICPA (2023). These principles are security, availability, processing integrity, confidentiality, and privacy.

Jotform has built the best practices of the SOC 2 framework into Jotform Enterprise's daily operations. SOC 2 compliance provides an added layer of security and confidence, on top of our already existing security and data protection offerings, which include [local data residency](#), HIPAA-friendly forms, and [single sign-on integrations](#).

SOC 2 Type II compliance requires an extensive auditing and documentation process that [ensures best practices are in place](#) to prevent, detect, and repair any threat to data security.

Selecting this option assures you that we have taken every opportunity to pressure-test our systems, procedures, and staff so your data stays secure.

When you request a server in our SOC 2-compliant environment, you also enable a HIPAA-friendly environment, and vice versa. Both HIPAA and SOC 2 compliance need to operate in this more secure environment. You can find detailed documentation of Jotform's policies and procedures that support HIPAA compliance [here](#).

No matter what kind of data you manage, it's safe with Jotform Enterprise. Jotform servers are hosted in Google Cloud, meaning Google is responsible for the physical security controls over the data centers hosting Jotform's infrastructure. We're proud to partner with such trusted services and are committed to operating effectively and keeping your data safe.

## Considerations for HIPAA compliance and integrations

HIPAA mandates that each time PHI is accessed, that action is tied to a known, unique individual. Regardless of the tools you integrate into your server, it's your legal responsibility to maintain policies and procedures that don't violate HIPAA.

If you have integrated your form submission data with a Google spreadsheet, for instance, and then made that sheet available to anyone, you would be in violation of HIPAA regulations.



### Did you know?

Those on non-HIPAA servers have 100+ available integrations. The number of available integrations on a HIPAA server goes down to 60+.

## Jotform Enterprise integrations

- ActiveCampaign
- Afterpay
- Airtable
- Apple Pay & Google Pay
- Asana
- Authorize.net
- AWeber
- BlueSnap
- Box
- Braintree
- Campaign Monitor
- CardConnect
- Cash App Pay
- Clearpay
- ClickUp
- Clover (formerly BluePay)
- Constant Contact
- Cybersource
- Dropbox
- eCheck.net
- Egnyte
- BlueSnap
- Eway
- GoCardless
- Google Calendar
- Google Drive
- Google Sheets
- HubSpot
- iyzico
- Keap
- Keragon
- Klarna
- Mailchimp
- MailerLite
- Make
- Maxio (formerly Chargify)

- Microsoft Teams
- Mollie
- monday.com
- Moneris
- OneDrive
- PagSeguro
- Payfast
- PayJunction
- Paymentwall
- PayPal Business
- PayPal Checkout
- PayPal Invoicing
- PayPal Personal
- Paysafe
- PayU
- Purchase Order
- Salesforce
- SensePass
- Skrill
- Slack
- Square
- Stripe
- Stripe ACH
- Stripe ACH Manual
- Stripe Checkout
- Venmo
- Verifone (formerly 2Checkout)
- Webhooks
- Worldpay UK
- Zapier
- Zoho CRM
- Zoom

## What is single sign-on (SSO), and how does it support integrations?

According to a recent report, 75 percent of people globally don't follow widely accepted best practices for password management (Security Magazine, 2023). A central database for logins can help your organization control credentials, provide a unified view of data usage, and keep employees' personal data secure.

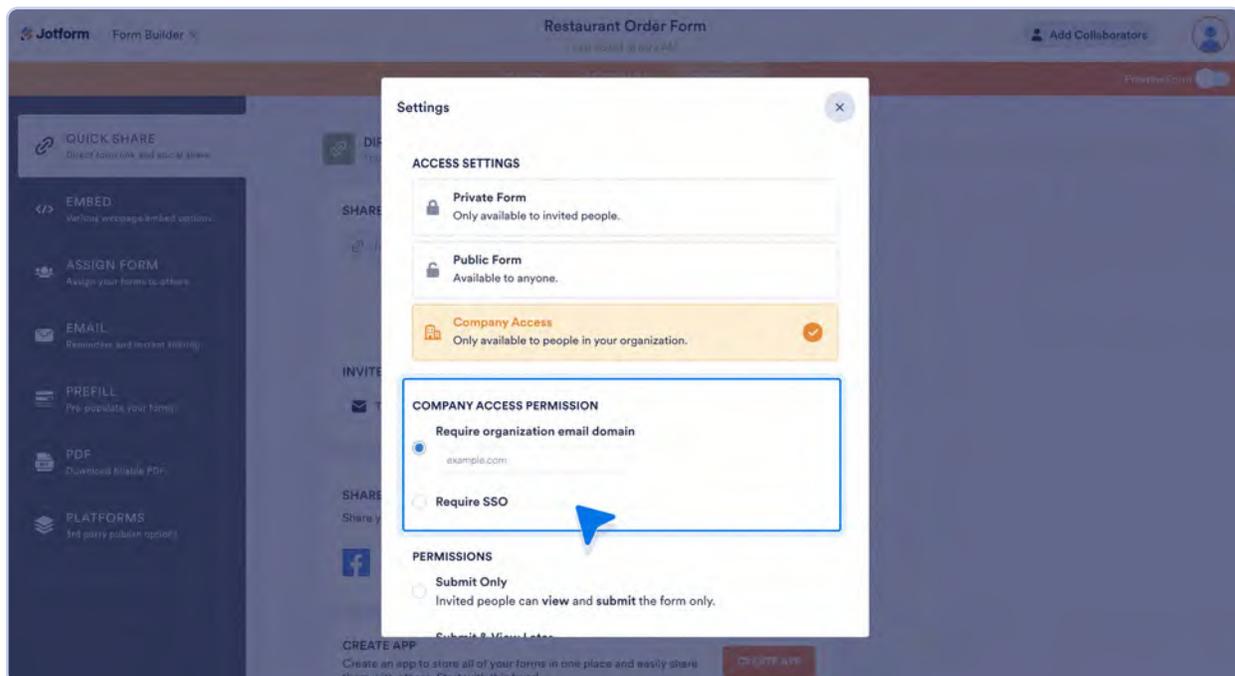
This is where SSO can help.

### SSO

SSO stands for single sign-on. This means everyone in your organization who uses Jotform Enterprise will have their own login and password, but all those logins and passwords are stored in one account.

With Jotform Enterprise's single sign-on (SSO) capabilities, everyone gets one login and one password. This cuts down on password sharing and keeps everyone's data safe and protected. Without single sign-on capabilities, members of your organization could create hundreds, if not thousands, of logins, each with its own data and no way for others to access it. Using a single sign-on will keep all your data in one place, decreasing data silos and keeping everyone on the same page.

You can require SSO for anything that can be set to company access: Forms, Tables, Inbox, Reports, etc. For Tables and Inbox, you can enable this option from the **Share Settings**. For Forms and Apps, you'll find this option under the **Publish** tab. Note that the SSO option won't appear in these menus if you haven't already set up single sign-on for your organization.



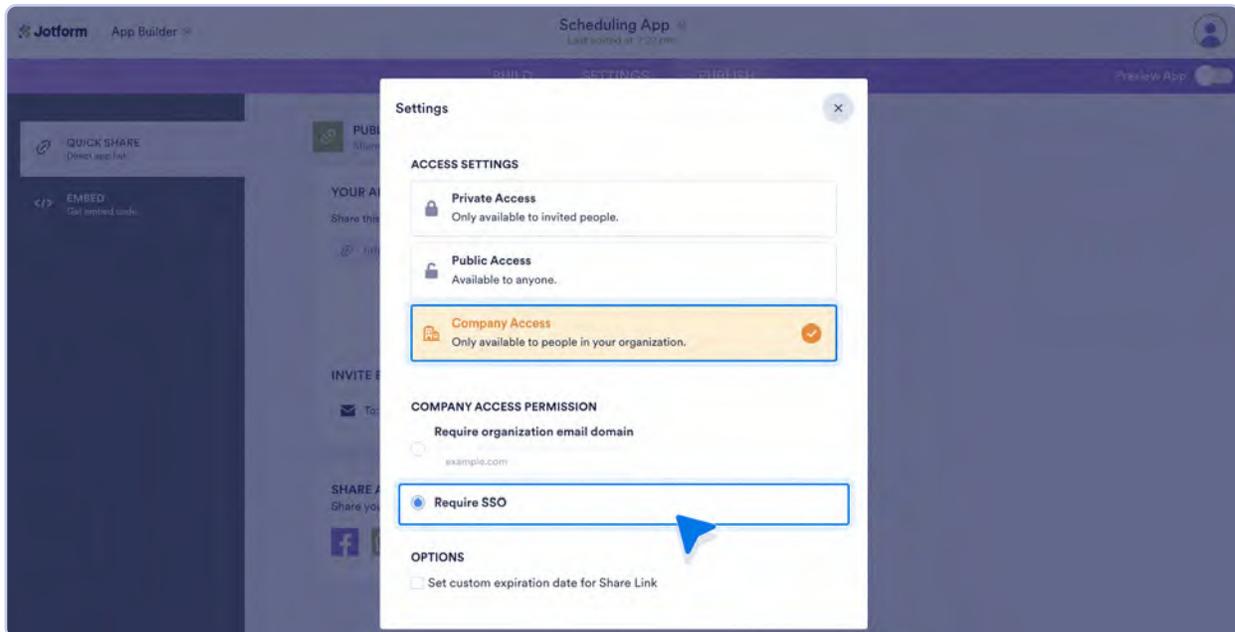
SSO also significantly reduces the risk of data breaches. We have quite a few SSO integrations with third-party identity providers for you to choose from, so you can use the SSO platform you feel most comfortable with.

To make things easier for your colleagues, you can use information from SSO to prefill forms. Your colleagues will enjoy increased security and save time on repetitive tasks like filling out forms. You can even use SSO in Jotform Apps for an added layer of security when you're on the go.

## SSO in Jotform Apps

The security and safety of SSO isn't limited to the office or your desktop; you can use SSO everywhere with the Jotform Enterprise Mobile app. SSO in apps works similarly to your desktop; you only need one set of credentials to log into your app.

Enabling SSO in your app is easy. All you have to do is go to the Publish tab, select **Company Access**, and then enter your company's email domain in the field below.



## Related integrations

SSO integrations allow you to use a third-party identification app for your login process. Jotform Enterprise integrates with several identity providers like Google, Okta, Duo, and OneLogin. This enables your users to access their forms through your organization's dedicated SSO portal.

### Microsoft Teams

Jotform also integrates with the Microsoft Entra ID (formerly Azure Active Directory) identity provider. If your organization works in Microsoft Teams, you can use your Entra ID credentials for simple SSO login across Jotform and Microsoft. You will also be able to set up your form submission data to send messages to your Teams channels and chats.

Check out Jotform's user guide on [how to enable SSO integrations](#) for more information.

## Prefill

SSO prefill will save your organization time and cut down on data entry mistakes. Jotform automatically fills out form fields, or prefills them, from your previously entered user data. This helps create uniformity among forms and saves your users time.

Because prefill uses the same information every time, you can rely on accurate data when you're tabulating results from large-scale surveys. Enabling SSO prefill will only take a couple of minutes, and you can reap the benefits of prefill for years to come. Check out Jotform's [user guide](#) to learn more.

## White labeling

White labeling could benefit your organization and the customers you serve. When you white label Jotform's products, you're getting all the powerful functionality of Jotform without doing the work to create the product yourself.

### White labeling is a win-win

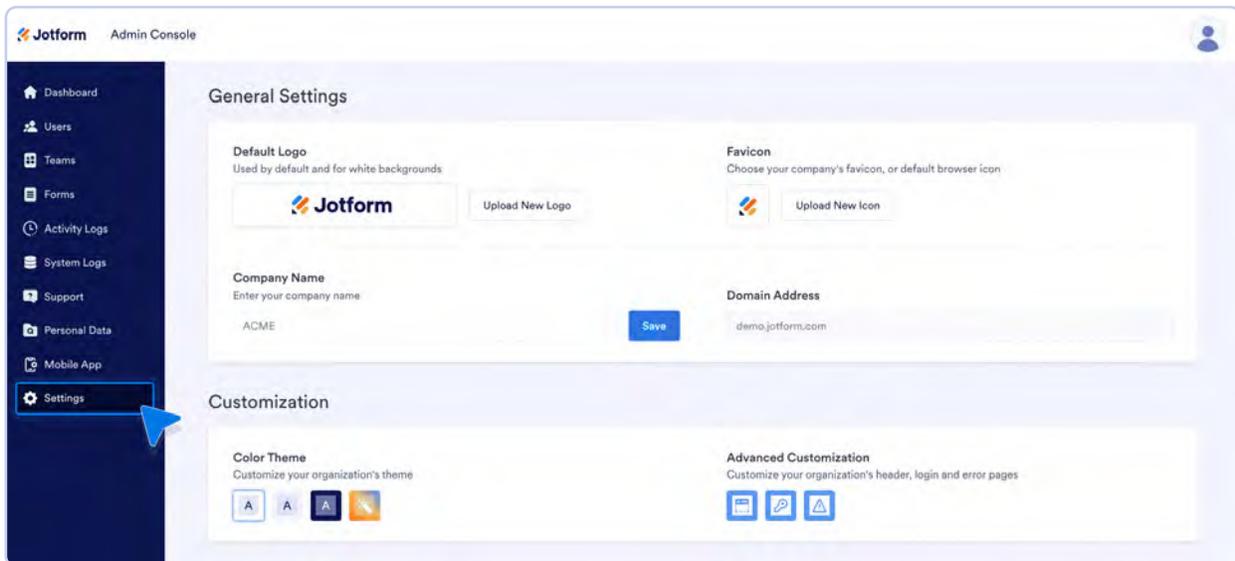
White labeling is when a company (in this case, Jotform) sells its products or services to another company, and then the purchasing company rebrands and sells the product or service itself. White labeling can be a win-win for your organization and your customers because it provides a fully functional branded product for customers without the organization having to use its precious time and resources to create it.

White labeling is very common among businesses that sell merchandise like workout gear and beauty products, and it's becoming increasingly common with SaaS products. In fact, white-labeled products accounted for a 17.7 percent share of the U.S. market (Statista, 2023).

But how do you white label Jotform's products? And how do you incorporate your branding into every aspect of your workflow?

## How to set up white labeling

After logging into your Enterprise account, go to the **Admin Console** and then **Settings**.

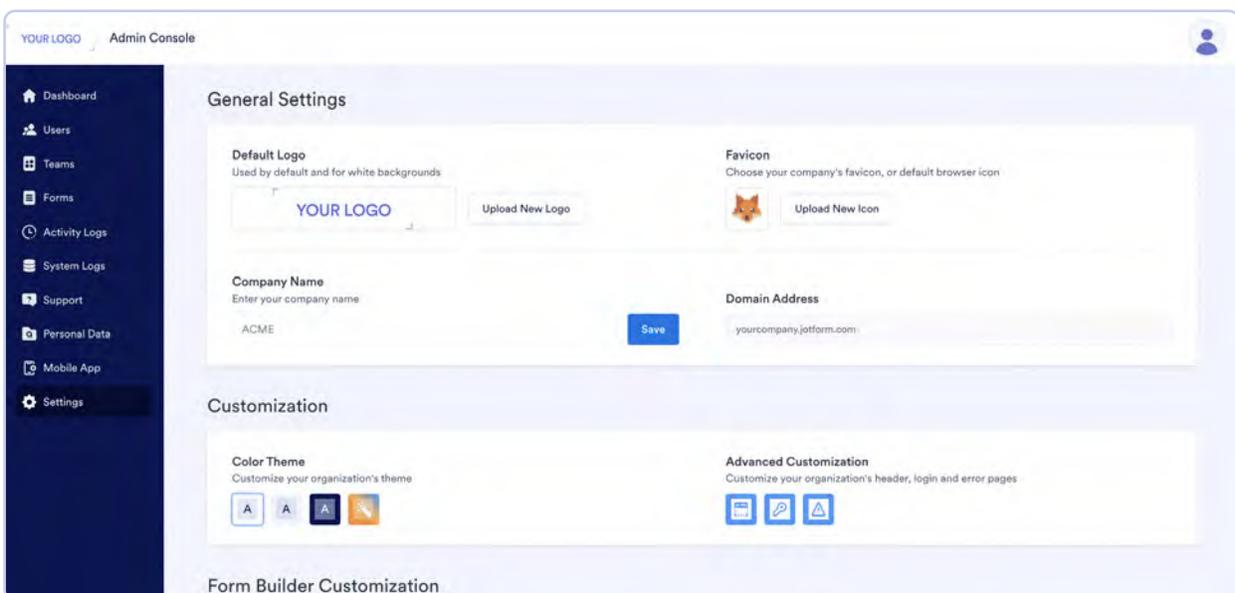


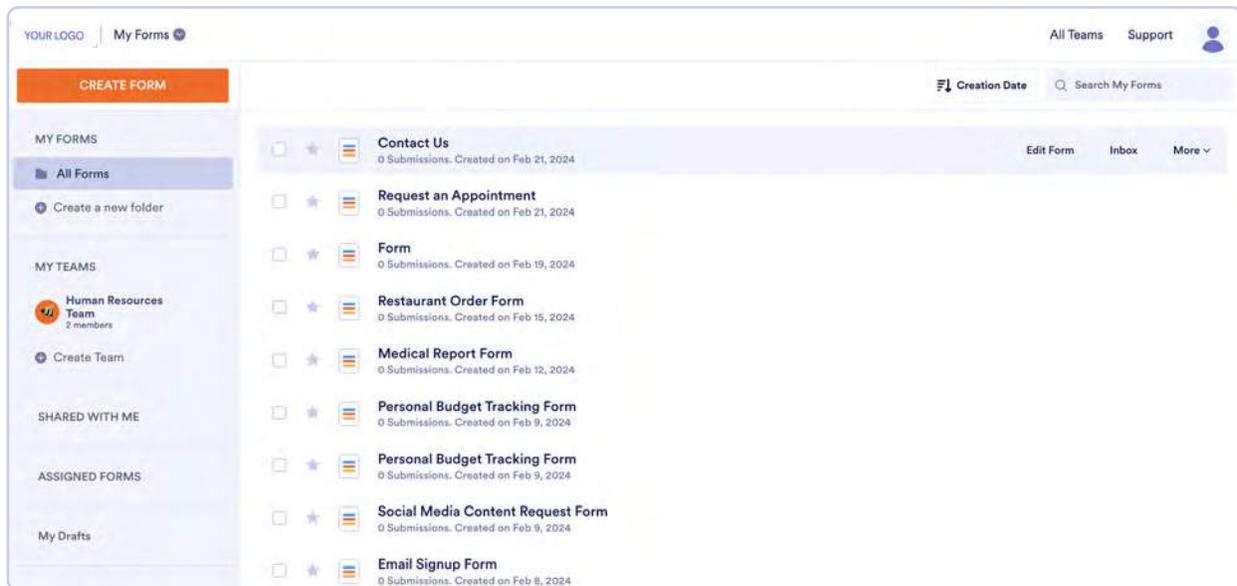
From there, you can see the majority of your white-labeling options. Under **General Settings**, you can update your logo and icon. Just click the **Upload New Logo** or **Upload New Icon** buttons. You can also change your company name and your domain address. Let's see what it looks like when you change the company name and domain address.



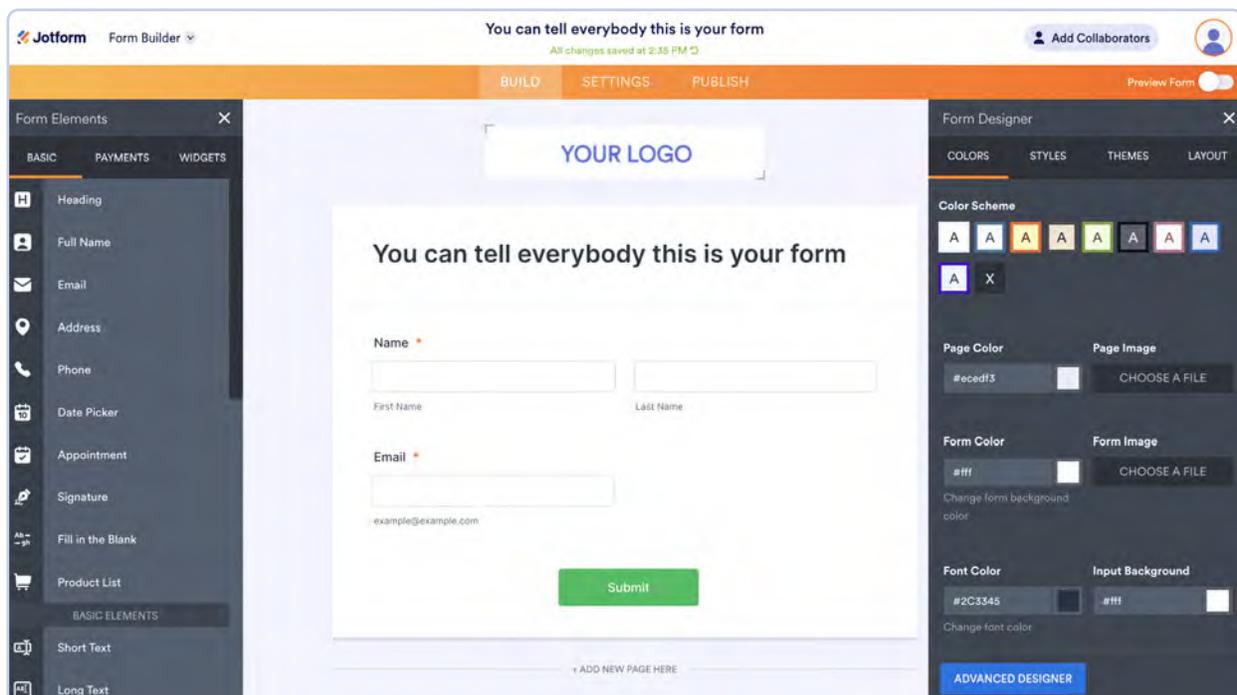
### Pro tip

Only account admins can change white-labeling options.

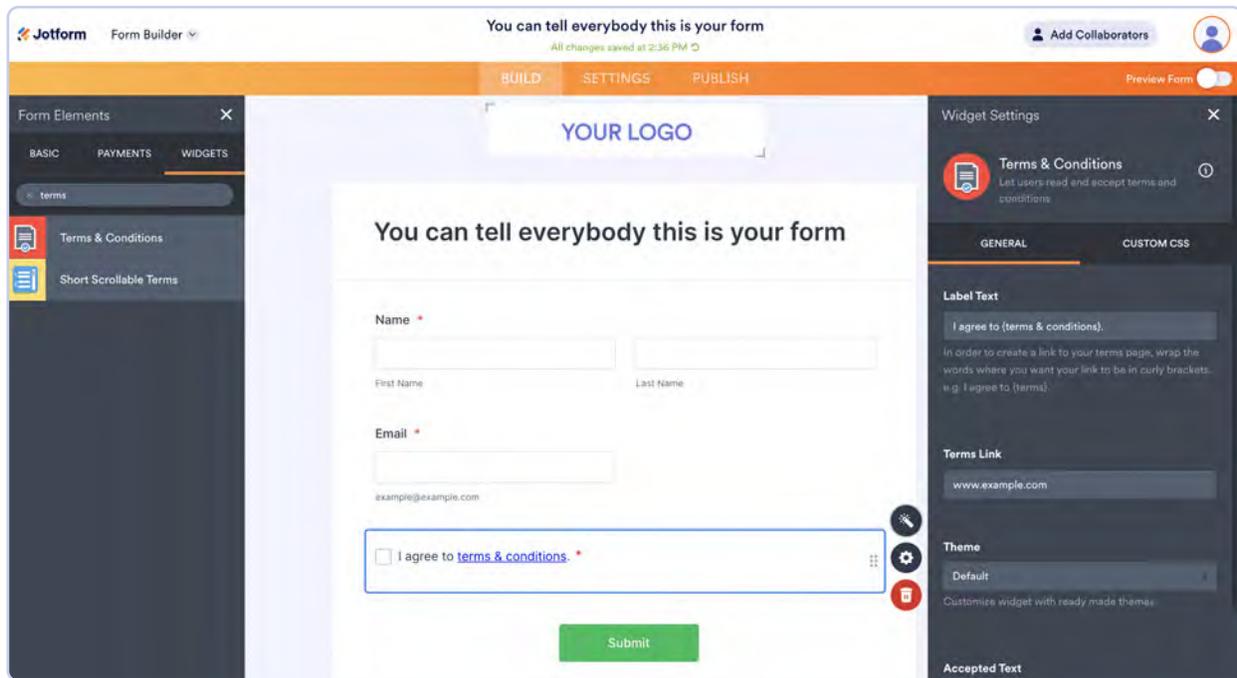




Jotform Enterprise gives you a wealth of customization options in the Form Builder to create beautifully branded forms. You can upload a logo, drag and drop various form elements, and specify your exact page color, form color, font color, and background. You can also adjust the alignment, spacing, and button styles on your forms to exactly mirror the look and feel you desire.



Additionally, many organizations take advantage of the available widgets to create custom forms for everyday transactions. For example, you could add a **Terms & Conditions** widget with your specific legal language and branding options, or upload a branded PDF to fulfill that need.



We'll cover all these customization options and the options available through the **Advanced Form Designer** in the next chapter.

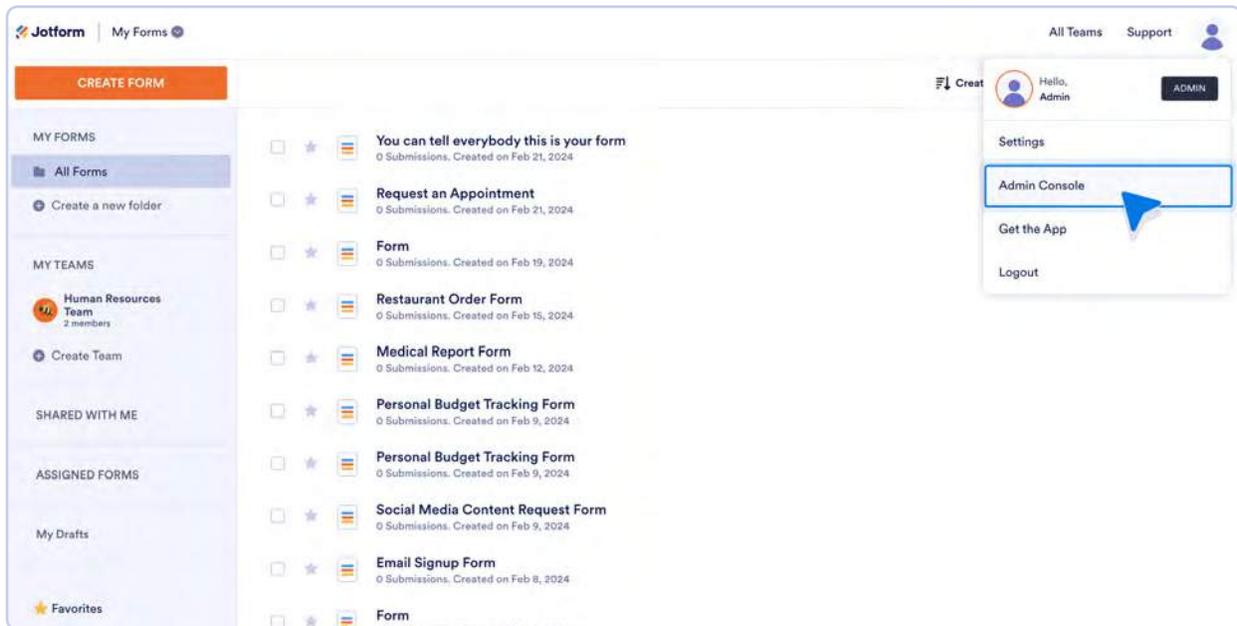
Overall, white labeling is a quick and easy way to create consistently branded products across your organization. And Jotform's granular level of personalization can make white labeling a breeze.

## Admin Console

When your organization first transitions from a Bronze, Silver, or Gold plan to Enterprise, the first obvious difference is the Admin Console. Available to admins only, the Admin Console is great because everything you need to successfully administer your system is in one place. Rachel Fugate, a web designer for the Arbor Day Foundation, uses the Admin Console to manage thousands of submissions from 250-plus forms with ease.

"We have 30 people using Jotform Enterprise. I manage the corporate account, which includes more than 265 forms, and set up new users with permissions using Jotform Enterprise's Admin Console. We upgraded to Jotform Enterprise to automate data reporting and accommodate the thousands of submissions we were anticipating as the success of our membership campaigns grows."

Accessing the Admin Console is easy. All you have to do is click on your avatar and then click Admin Console from the dropdown menu.



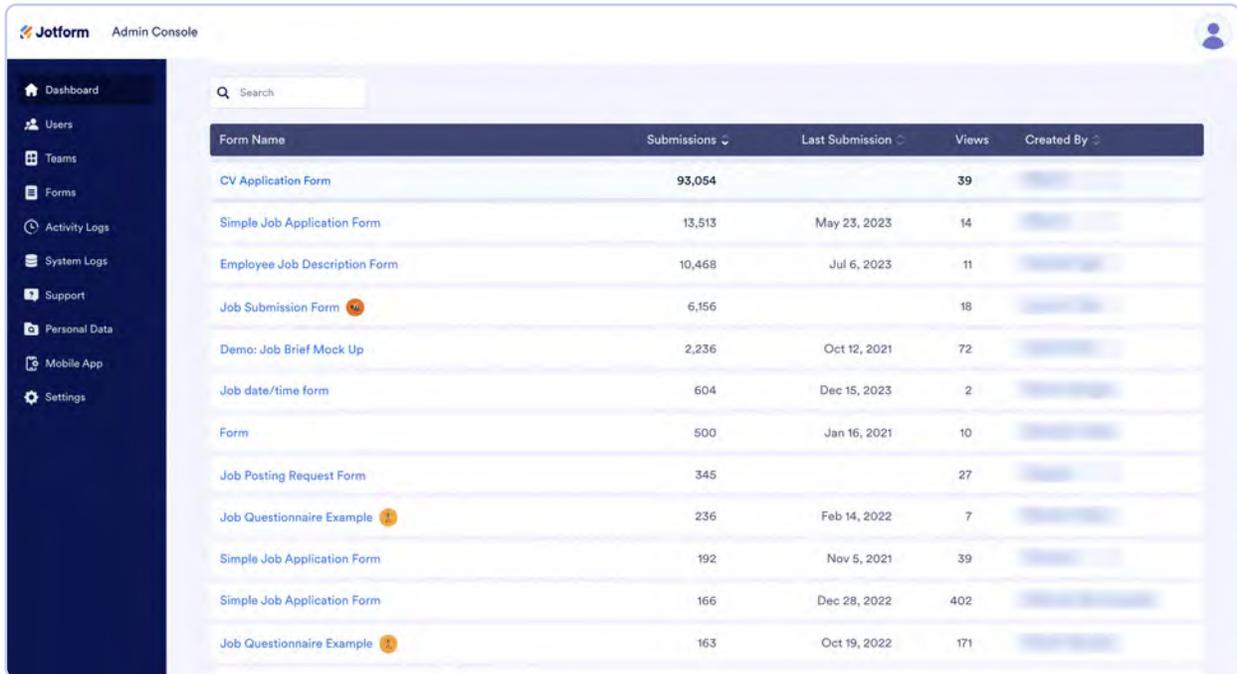
Now you can check out all your data and analytics in one place.

## Dashboard

When you open the Admin Console, you'll see the **Dashboard**, which gives you a high-level overview of your form's analytics.



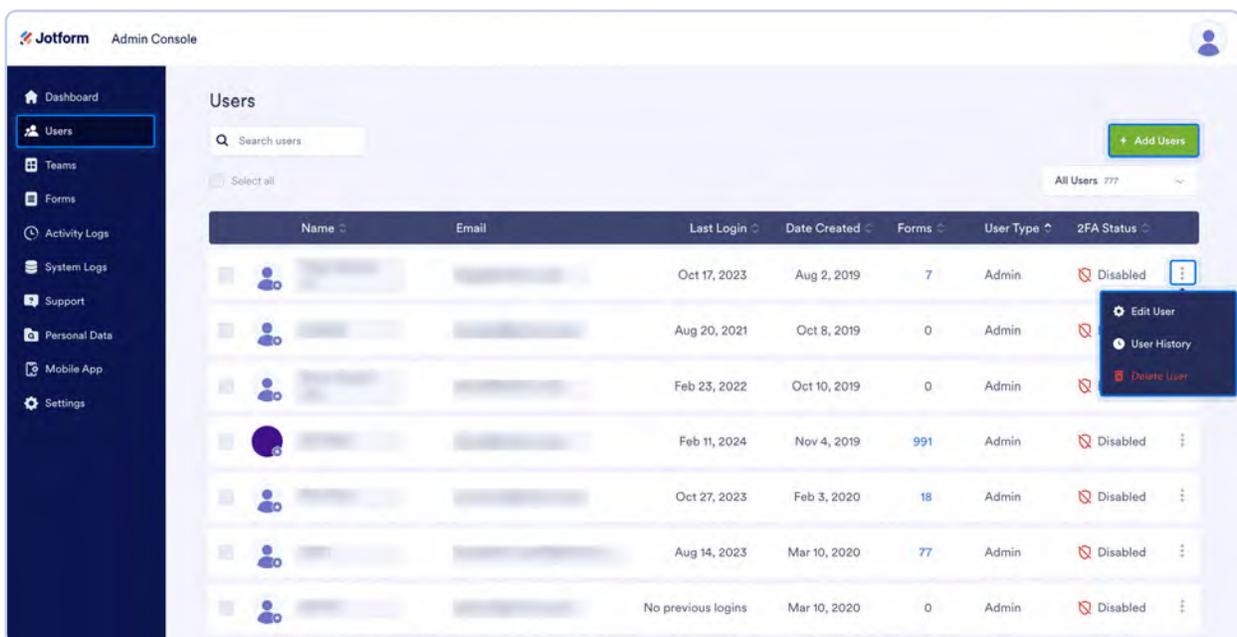
Scroll down a little further and you'll see a list of all your forms, who made them, the number of submissions, the number of views, and the date of the last submission.



| Form Name                     | Submissions | Last Submission | Views | Created By |
|-------------------------------|-------------|-----------------|-------|------------|
| CV Application Form           | 93,054      |                 | 39    |            |
| Simple Job Application Form   | 13,513      | May 23, 2023    | 14    |            |
| Employee Job Description Form | 10,468      | Jul 6, 2023     | 11    |            |
| Job Submission Form           | 6,156       |                 | 18    |            |
| Demo: Job Brief Mock Up       | 2,236       | Oct 12, 2021    | 72    |            |
| Job date/time form            | 604         | Dec 15, 2023    | 2     |            |
| Form                          | 500         | Jan 16, 2021    | 10    |            |
| Job Posting Request Form      | 345         |                 | 27    |            |
| Job Questionnaire Example     | 236         | Feb 14, 2022    | 7     |            |
| Simple Job Application Form   | 192         | Nov 5, 2021     | 39    |            |
| Simple Job Application Form   | 166         | Dec 28, 2022    | 402   |            |
| Job Questionnaire Example     | 163         | Oct 19, 2022    | 171   |            |

## Users

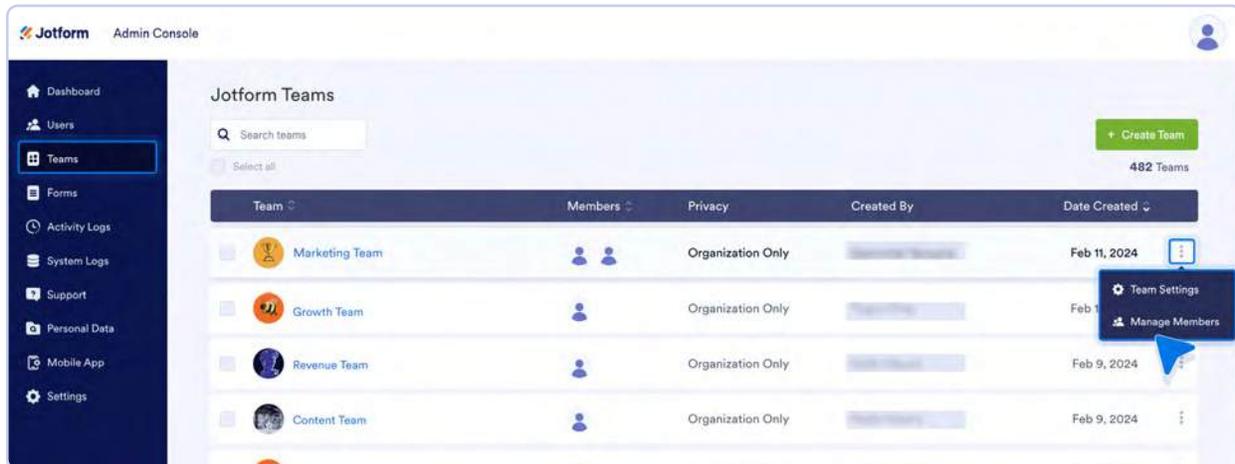
Next is the **Users** tab. This is where you can see everyone who uses your Jotform account and the forms they created. From here you can also adjust or delete their permissions. Admins can change users' permissions at any time.



| Name        | Email      | Last Login         | Date Created | Forms | User Type | 2FA Status |
|-------------|------------|--------------------|--------------|-------|-----------|------------|
| [User Icon] | [Redacted] | Oct 17, 2023       | Aug 2, 2019  | 7     | Admin     | Disabled   |
| [User Icon] | [Redacted] | Aug 20, 2021       | Oct 8, 2019  | 0     | Admin     | Disabled   |
| [User Icon] | [Redacted] | Feb 23, 2022       | Oct 10, 2019 | 0     | Admin     | Disabled   |
| [User Icon] | [Redacted] | Feb 11, 2024       | Nov 4, 2019  | 991   | Admin     | Disabled   |
| [User Icon] | [Redacted] | Oct 27, 2023       | Feb 3, 2020  | 18    | Admin     | Disabled   |
| [User Icon] | [Redacted] | Aug 14, 2023       | Mar 10, 2020 | 77    | Admin     | Disabled   |
| [User Icon] | [Redacted] | No previous logins | Mar 10, 2020 | 0     | Admin     | Disabled   |

## Teams

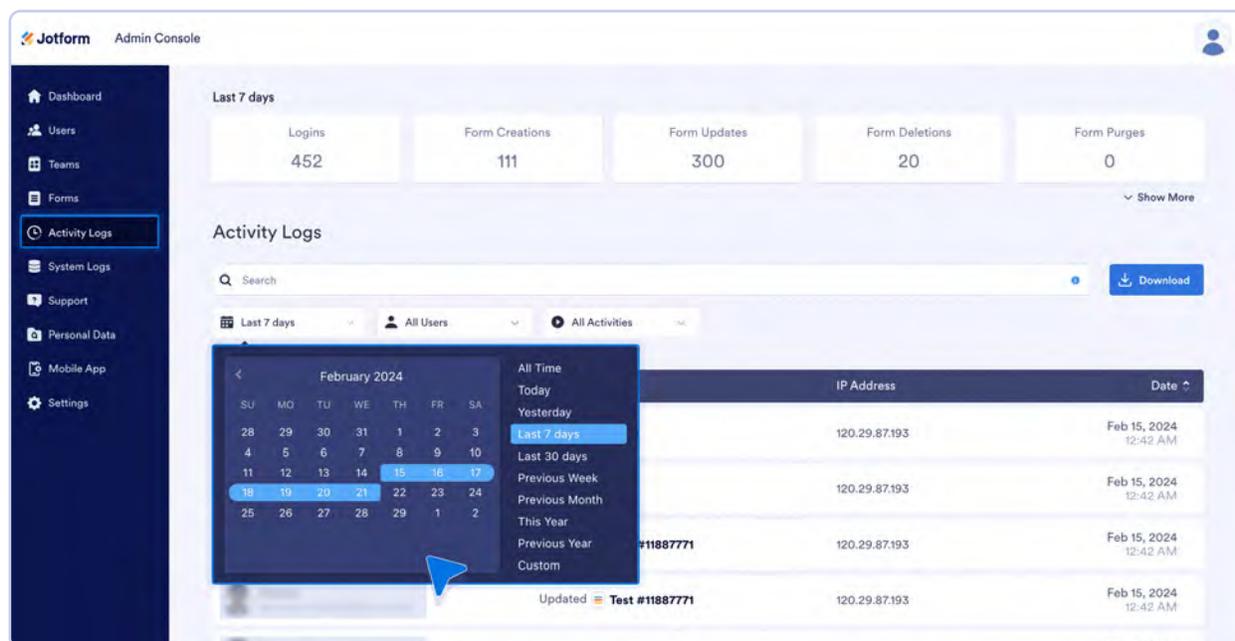
In the **Teams** tab, you'll find a list of all the teams in your Enterprise account. Similar to how you manage users, you can add, edit, and delete a team as well. Just open the menu to the right side of the team.



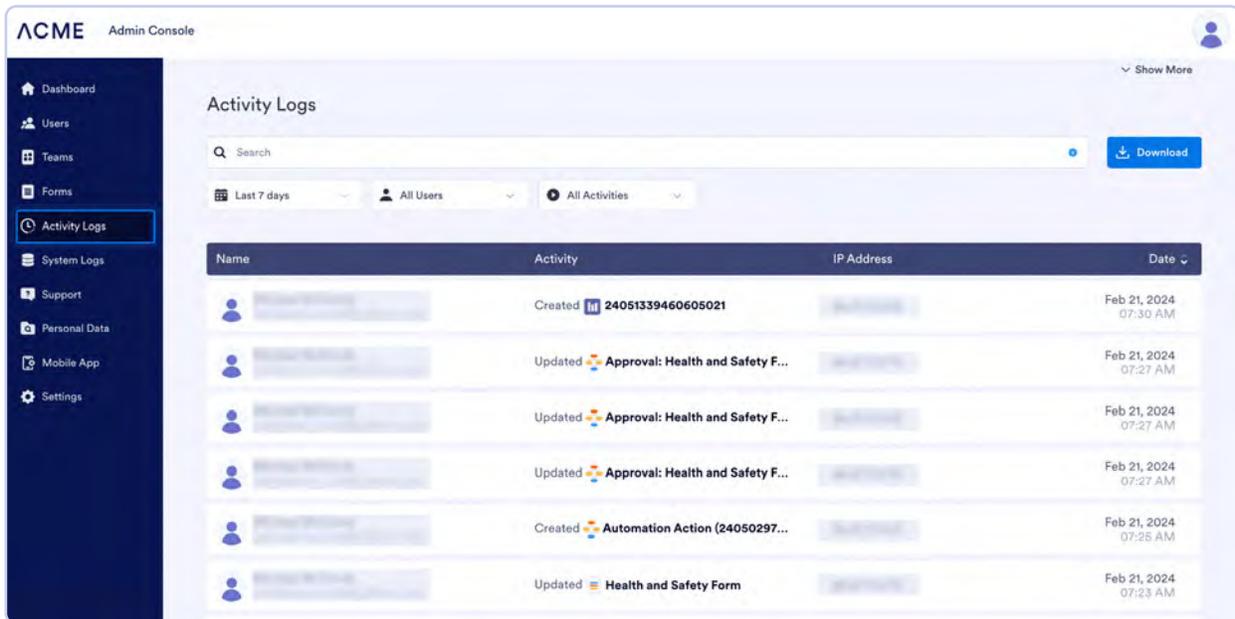
From there, you can manage the members of an individual team and the team's settings. Check out our [Jotform Teams](#) user guides to learn more.

## Activity Logs

Activity Logs give you a high-level overview of your forms only, such as how many forms have been created, updated, and deleted, as well as the number of logins over the last week. If you want to search logs from a different time frame, click the calendar dropdown.



You can further narrow down your search by user and activity.



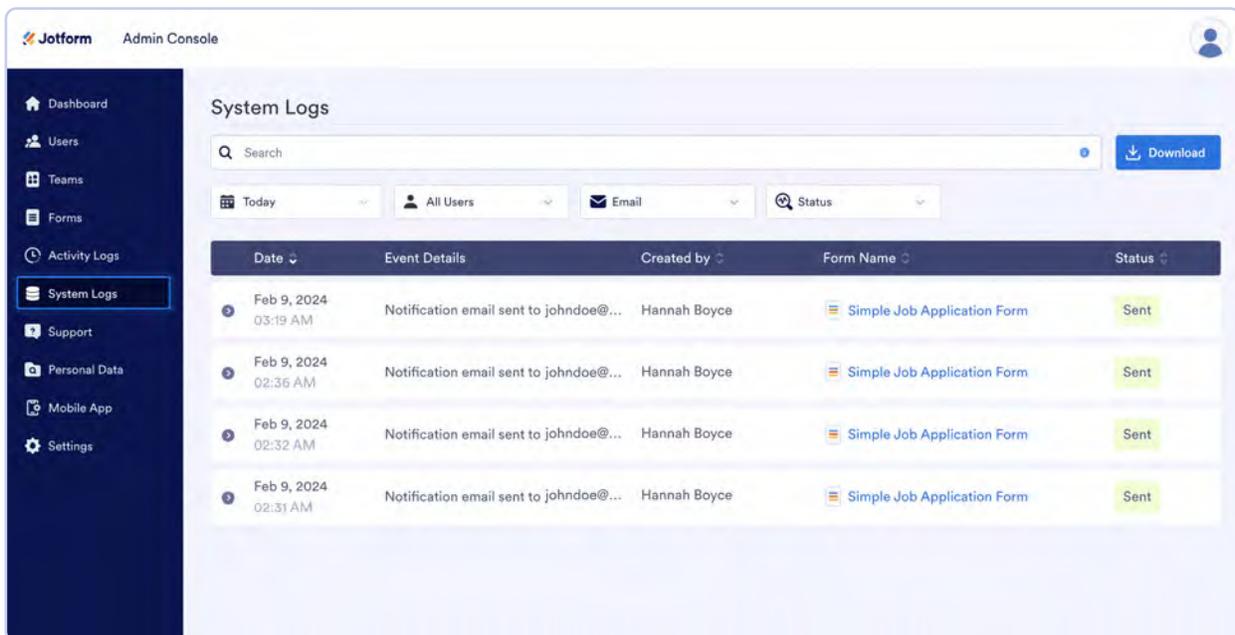
The screenshot shows the 'Activity Logs' section in the Jotform Admin Console. The left sidebar is highlighted on 'Activity Logs'. The main content area has a search bar, a 'Download' button, and filters for 'Last 7 days', 'All Users', and 'All Activities'. Below these filters is a table with the following data:

| Name        | Activity   | IP Address   | Date                  |
|-------------|--|--------------|-----------------------|
| [User Icon] | Created [Form Icon] 24051339460605021                | [IP Address] | Feb 21, 2024 07:30 AM |
| [User Icon] | Updated [Form Icon] Approval: Health and Safety F... | [IP Address] | Feb 21, 2024 07:27 AM |
| [User Icon] | Updated [Form Icon] Approval: Health and Safety F... | [IP Address] | Feb 21, 2024 07:27 AM |
| [User Icon] | Updated [Form Icon] Approval: Health and Safety F... | [IP Address] | Feb 21, 2024 07:27 AM |
| [User Icon] | Created [Form Icon] Automation Action (24050297...   | [IP Address] | Feb 21, 2024 07:25 AM |
| [User Icon] | Updated [Form Icon] Health and Safety Form           | [IP Address] | Feb 21, 2024 07:23 AM |

Narrowing down your search to such a granular level makes it easy to keep track of your users' activities and the processes they create with Jotform.

## System Logs

The **System Logs** tool is great for monitoring form emails and integrations. Check out [Chapter 6](#) for a detailed overview.

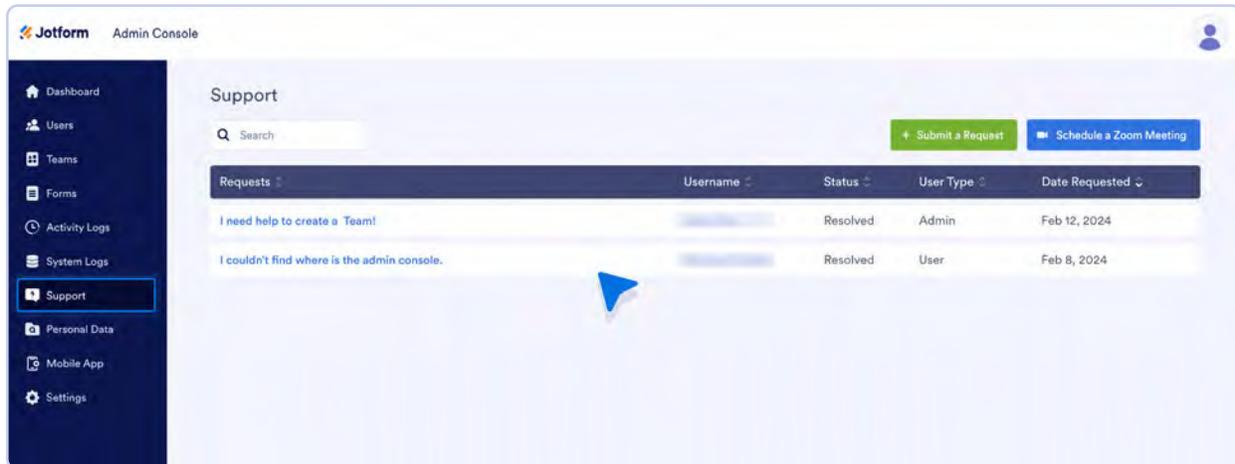


The screenshot shows the 'System Logs' section in the Jotform Admin Console. The left sidebar is highlighted on 'System Logs'. The main content area has a search bar, a 'Download' button, and filters for 'Today', 'All Users', 'Email', and 'Status'. Below these filters is a table with the following data:

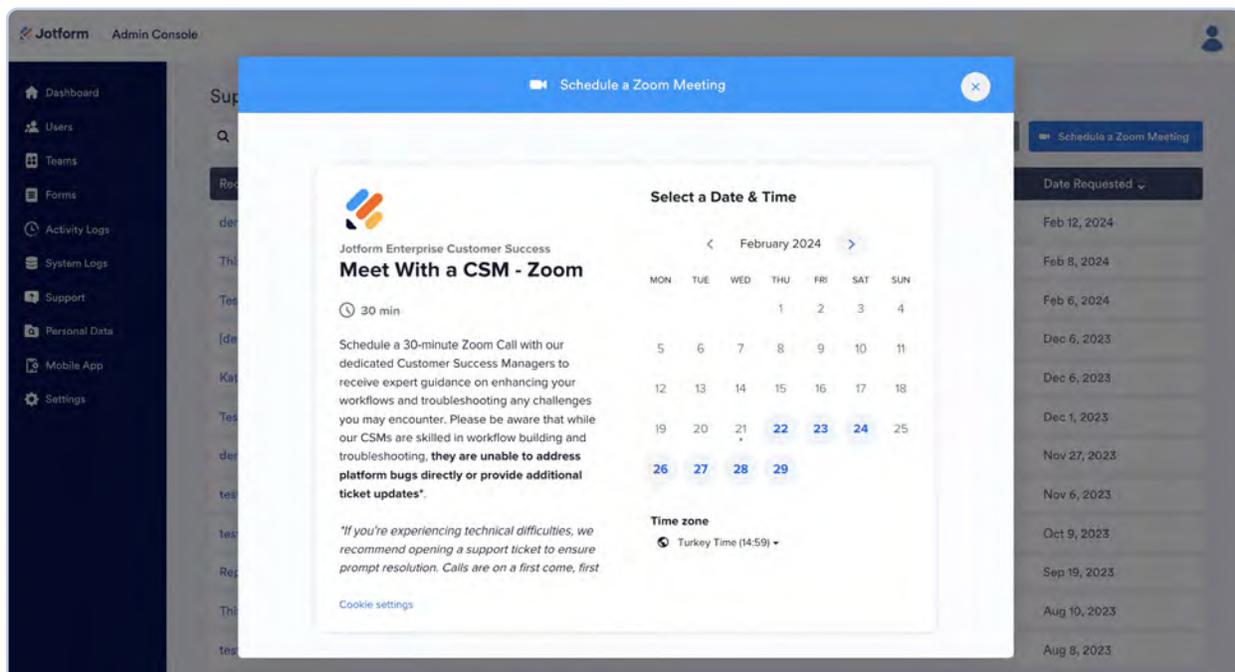
| Date                 | Event Details                          | Created by   | Form Name                   | Status |
|----------------------|--|--------------|-----------------------------|--------|
| Feb 9, 2024 03:19 AM | Notification email sent to johndoe@... | Hannah Boyce | Simple Job Application Form | Sent   |
| Feb 9, 2024 02:36 AM | Notification email sent to johndoe@... | Hannah Boyce | Simple Job Application Form | Sent   |
| Feb 9, 2024 02:32 AM | Notification email sent to johndoe@... | Hannah Boyce | Simple Job Application Form | Sent   |
| Feb 9, 2024 02:31 AM | Notification email sent to johndoe@... | Hannah Boyce | Simple Job Application Form | Sent   |

## Support

The **Support** tab contains a log of all the support requests made on your organization's account. Search functionality allows you to find a specific support request.



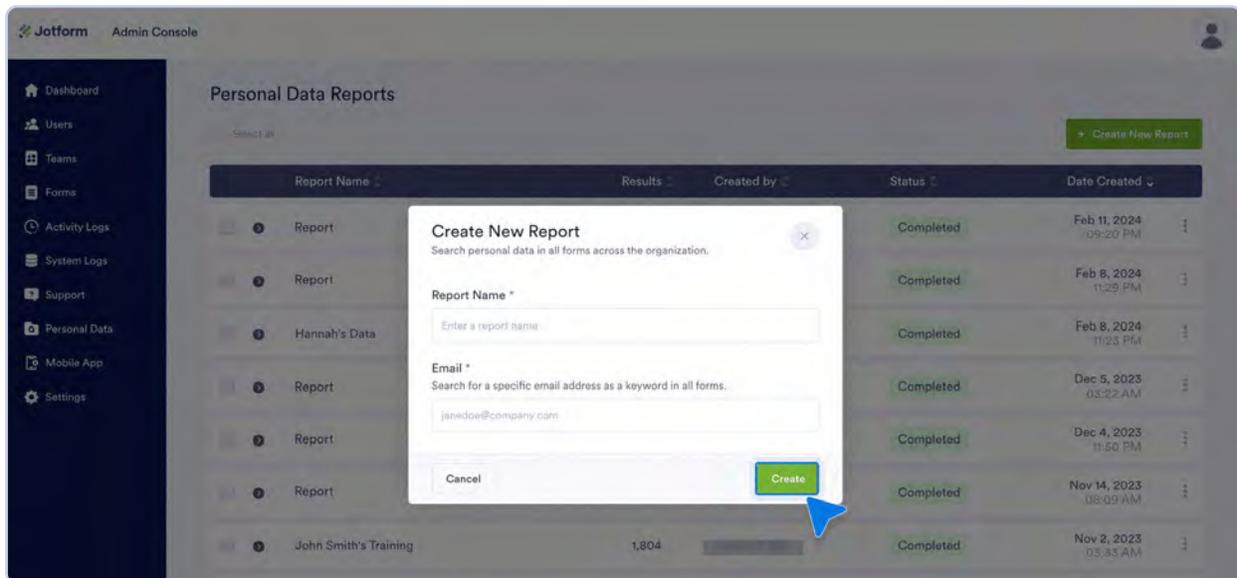
The Support tab is also where you can submit support requests and schedule Zoom meetings with an expert from our Enterprise Customer Success team. These 30-minute calls are best suited to resolving simple form and workflow questions. To schedule a meeting, just click the **Schedule a Zoom Meeting** button and pick a time from the calendar that works for you.



If you have a broader question — for instance, something about your server or a technical outcome — submitting a ticket will ensure our support and engineering teams can quickly read and expedite your request.

## Personal Data

Everyone has a right to request their data. That's why Jotform created the **Personal Data** tab, where you can create reports of personal data within a few minutes. When you want to pull a report of someone's data, just click the **Create New Report** button. From there, enter the email address of the person's data you want to pull. Jotform will email you a report containing all their data.



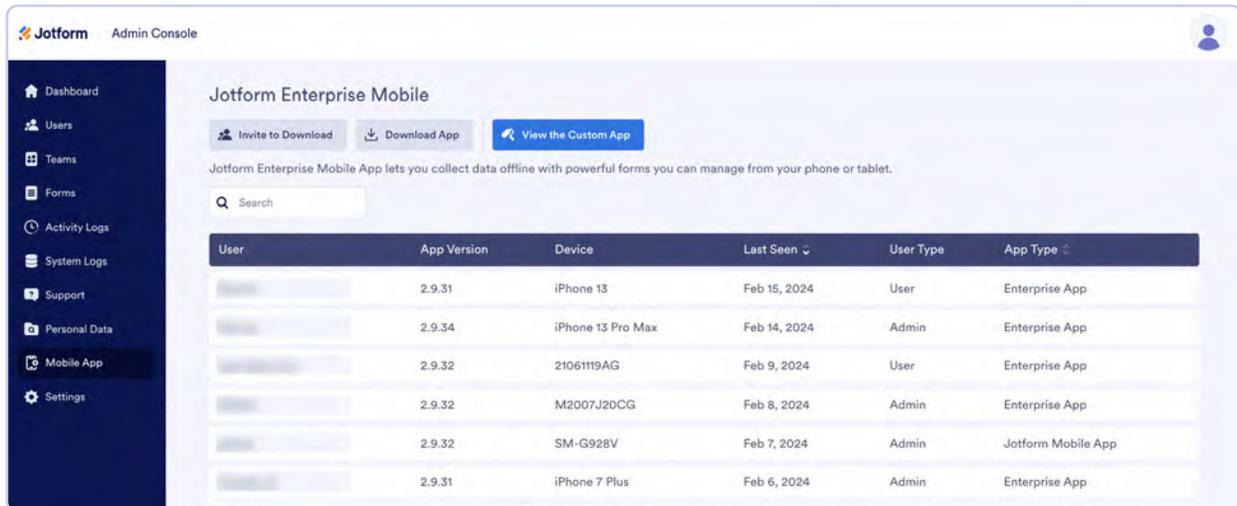
### Pro tip



Personal data exports aren't available on HIPAA servers due to strict privacy standards for the export of PHI.

## Mobile App

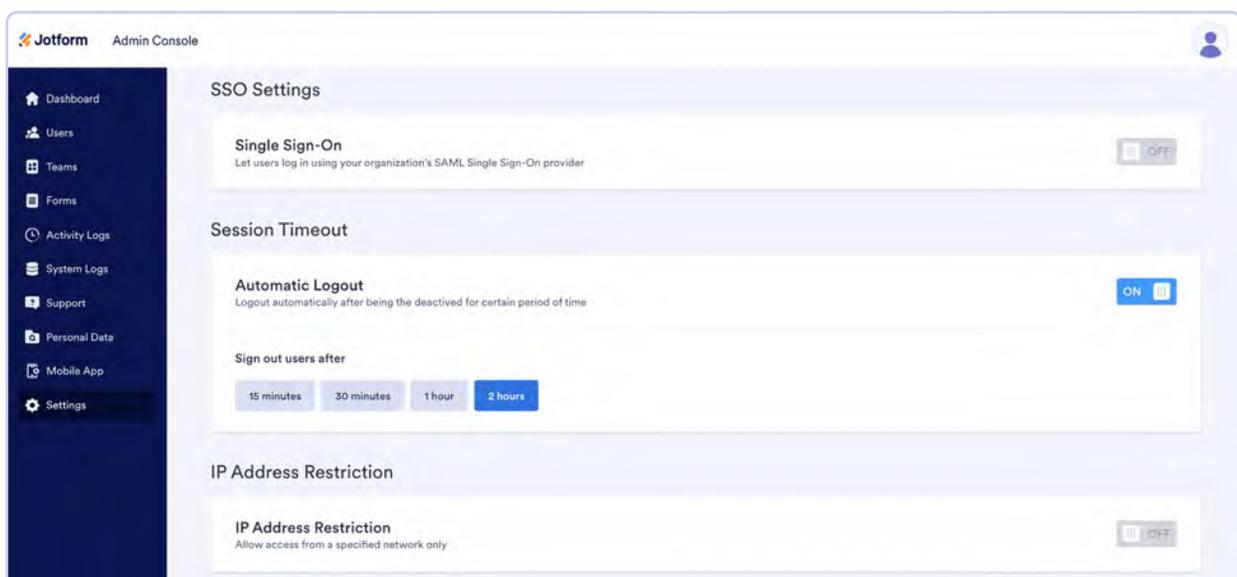
Admins can see everyone who's downloaded the app right from the Admin Console. Just click on the **Mobile App** tab. When you first open the Mobile App tab, you'll see a list of every app user. You can also download the app yourself, invite others to download the app, and view your app.



Check out [Chapter 10](#) for more information on Jotform Enterprise Mobile.

## Settings

Last but not least, we have the Settings tab, which gives you full control of your Enterprise account, from the widgets displayed to the colors of forms. The Settings tab might look a little familiar if you read about white labeling earlier. That's because it's the place where you can add custom colors and themes to your Jotform Enterprise products, control your payment integrations and widgets, and much more.



Here's a non-exhaustive list of everything you can do in the Settings tab:

- Set a company logo.
- Set a favicon (Jotform only accepts .ico files for favicons).
- Change your company name.
- Set up a Single Sign-On (SSO) integration. To learn more, see [Enabling SSO](#).
- Set timeouts and restrictions.
- View the domain address of your server.

Note: To connect a custom domain to your server, contact your dedicated support team via email for the instructions.

## Setting up a server has never been easier

No matter the unique needs of your organization, Jotform Enterprise has you covered. Jotform's security features keep your data safe and protected. Our many levels of security also mean you're bound to find one that works with your organization's policies and facilitates compliance with the regulations for your industry or location.

Whether that be SOC 2, HIPAA, or SSO integrations, Jotform Enterprise has it all. The Admin Console gives you the tools to manage your users, forms, and data from one place. Our data migration process means your organization will be able to go from onboarding to form building quickly and with as little interruption as possible.

Now that you're onboarded and ready, let's check out how to build your first form.

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## Chapter 4

# Creating your first form

The staff at Orthollinois had long heard clients ask them to digitize their data intake forms. The request seemed simple enough, but they couldn't make it work with their electronic medical record (EMR) software. Then Bill Coller, Orthollinois's business development manager, discovered Jotform Enterprise. In 15 minutes, he created a form that worked better than the one they had been working on for almost 10 years.

While working as the associate director for the Law Library at the University of Missouri — Kansas City, Ayyoub Ajmi realized the huge potential to serve people, particularly those who are disadvantaged or otherwise at risk, by applying the power of technology to the legal field.

After working with regional legal aid organizations and completing his JD, Ajmi, founder of CivilLaw. Tech, used Jotform Enterprise to create the Kansas Protection Order Portal (KSPOP) in just under two months. The system enables anyone in Kansas with a mobile or Wi-Fi connection to file a protection order from any device without assistance. "I want to be in the business of saving lives," says Ajmi. "Jotform Enterprise came to the rescue."

As you will soon discover, these stories of transformation are not the achievements of a few outliers. Organizations around the world use Jotform Enterprise to create profound changes in the way they communicate, collaborate, and get things done every day.

## Diving into online forms

The best way to become familiar with the Jotform Enterprise platform is to dive right in. Building a form is quick and easy, thanks to the no-code Form Builder. It's an intuitive process that can be fun, too, especially as you try advanced automation and design options.

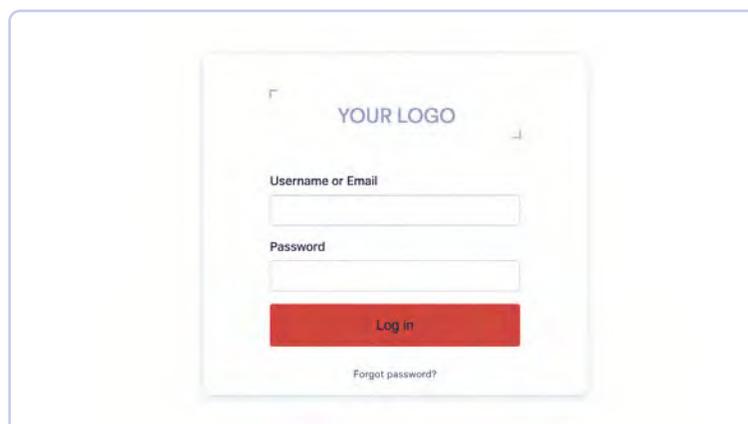
If you're the admin for your organization's Jotform Enterprise account, you have several resources at your disposal. Your dedicated Business Development Manager and Customer Success team will guide you through your server setup and any integrations or customizations you may need. You can also access [API documentation](#) and our [Migration to Enterprise documentation](#) if your organization is upgrading from any of our single-user accounts.

Once your server is set up, take advantage of webinars, user guides, video tutorials, and onboarding materials to familiarize yourself with the platform.

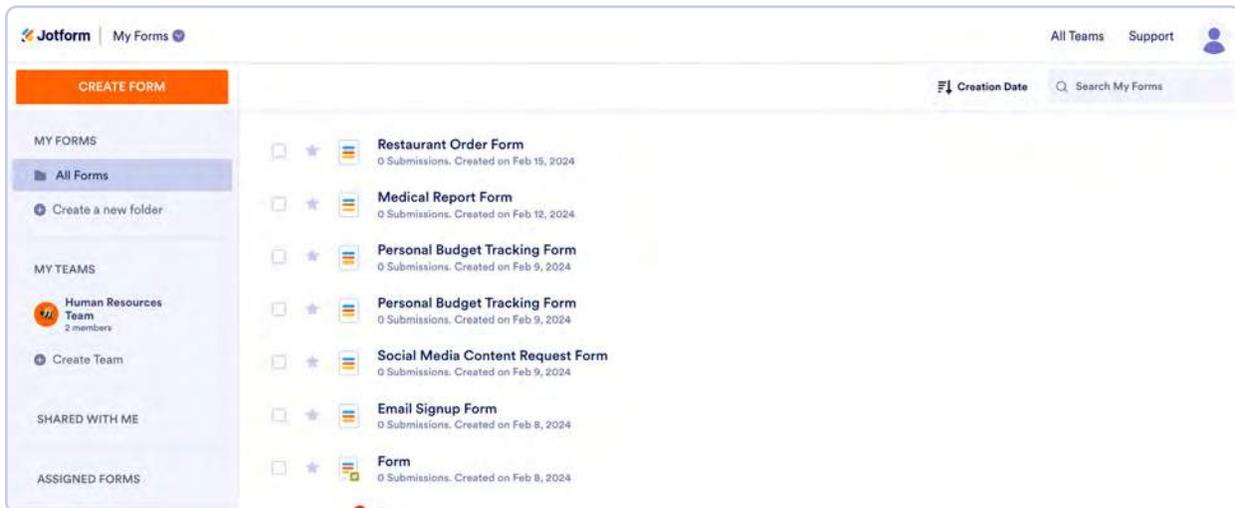
If you're a new user, you may receive an email from your administrator, prompting you to sign up. Click the **Sign Up** button in the email to access your organization's account and create your password.



If you've already created login credentials under your organization's account, log into your server. Depending on your organization's account setup, you may be able to access the platform with credentials for your single sign-on provider.



Your Jotform home base is the **My Forms** dashboard, which lists your forms and provides various options for editing, viewing, and managing them.



### Did you know?

On average, nearly 28,000 forms are created with Jotform every day!

Let's create your first form. Click the **Create Form** button near the upper left portion of the page. This will give you a few different paths to take when creating your form.

## Choose your own adventure with Jotform Enterprise

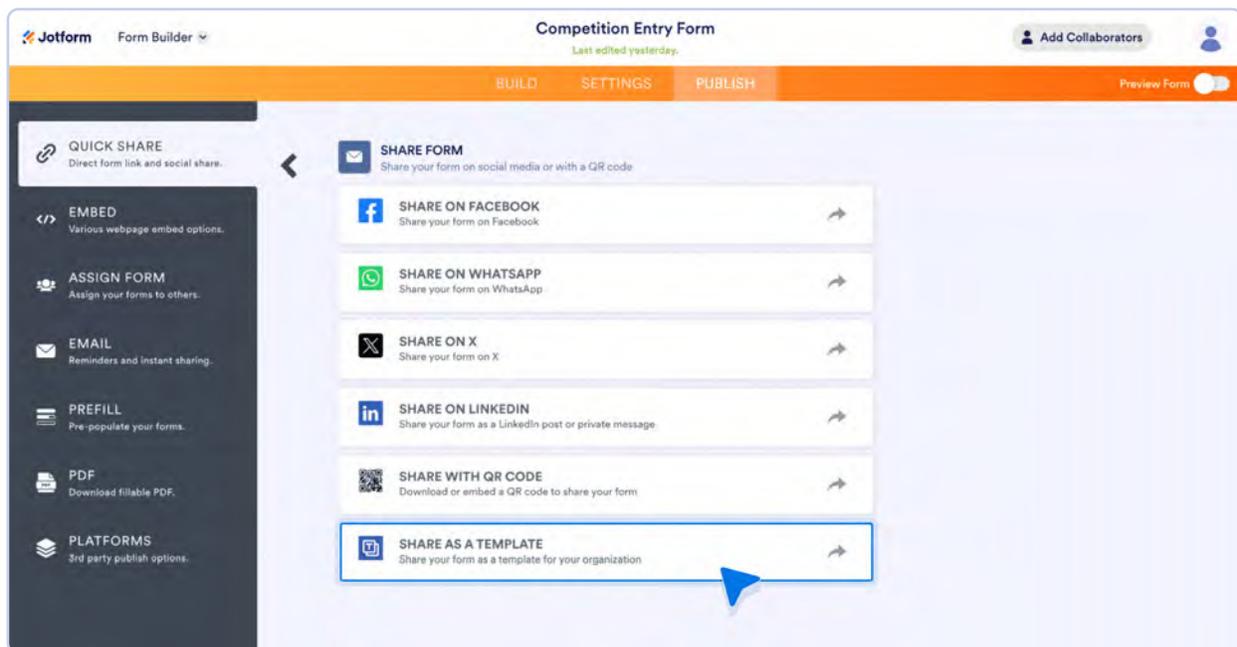
Creating a form with Jotform Enterprise takes mere seconds, and you can distribute it almost as quickly. You'll also discover an array of customization options every step of the way — when creating your forms, sharing them, and using the data collected through your forms. You can make your form unique, link it to third-party apps, create your own no-code mobile app, turn form responses into PDF files, and more.

The creativity of Jotform's community of users can blaze brand-new paths too. Enterprise Customer Support and Jotform Enterprise Product teams monitor user-requested features and often implement them into the platform. Having an open line of communication with our users is a vital part of Jotform's culture of refinement and innovation, and it always will be.

## Creating a form from scratch

Jotform has thousands of form templates you can use and customize. To start from a blank slate, you can create a form from scratch. In both cases, Jotform's Form Builder makes it easy to drag and drop different elements into a form that perfectly matches your needs.

Additionally, admin users can create their own unique templates to share with their team.



Amsterdam University of Applied Sciences quickly began using templates and forms to manage classes and events, finding them a more cost-effective way to accomplish their goals — even for people without a technical background.

It won't be long before creating a form is second nature, but before you let your creativity flow on a blank canvas, you have a choice to make between a traditional form with **Jotform Classic**, or a form that shows the respondent just one question at a time, **Jotform Cards**.

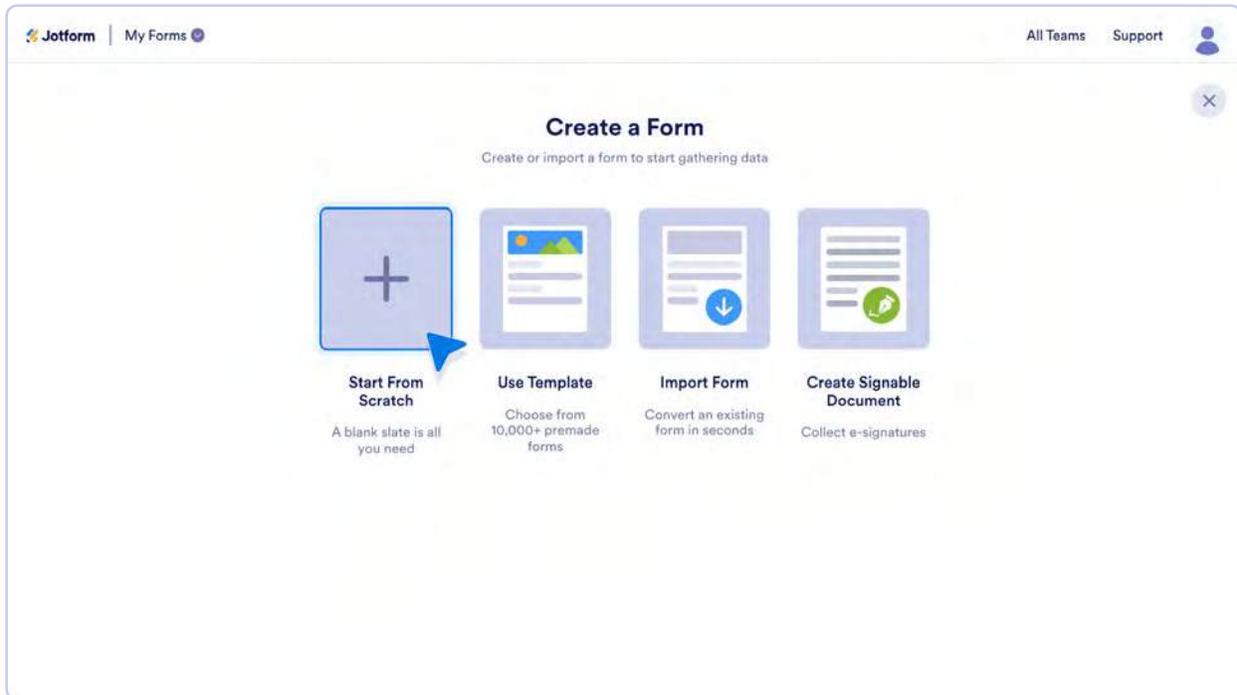
### Jotform Classic

Jotform Classic forms are light years ahead of paper forms but have a familiar look and feel. Every one of our forms is meant for the technology-rich world of today and for what lies ahead as life becomes increasingly digital.

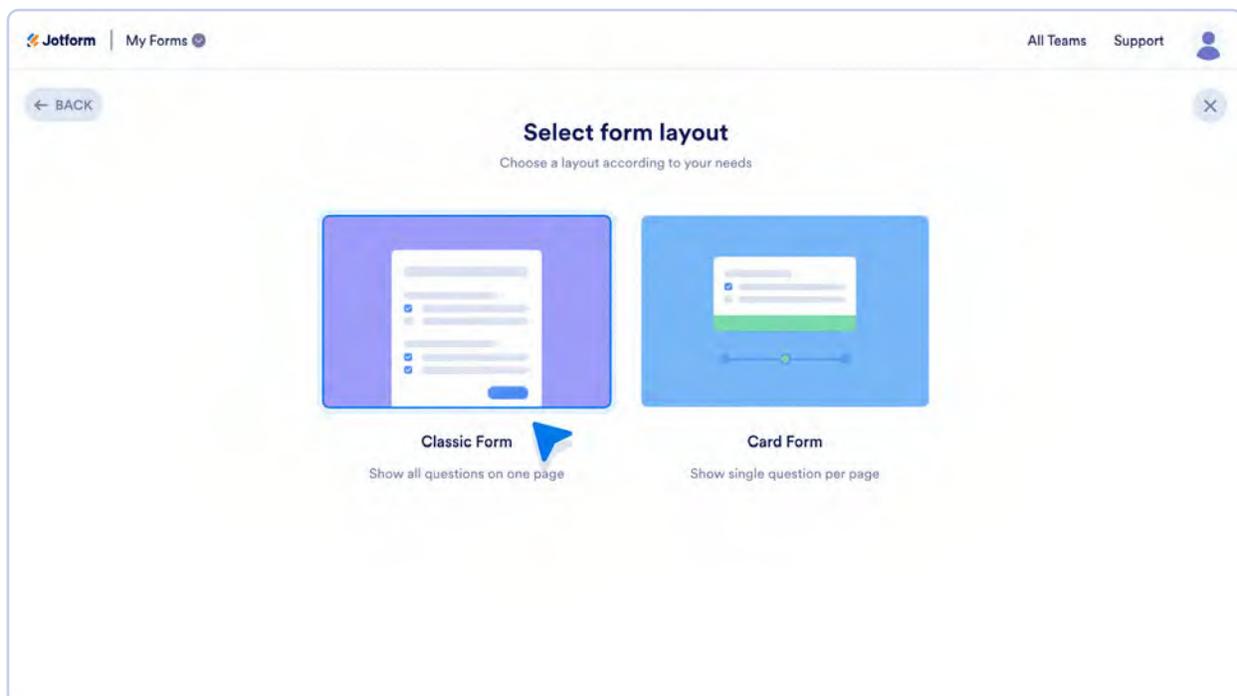
Drag and drop selected elements onto your form in the Form Builder, and your creation will be ready to collect submissions in minutes.

In traditional fashion, all the elements will be visible on the form at one time.

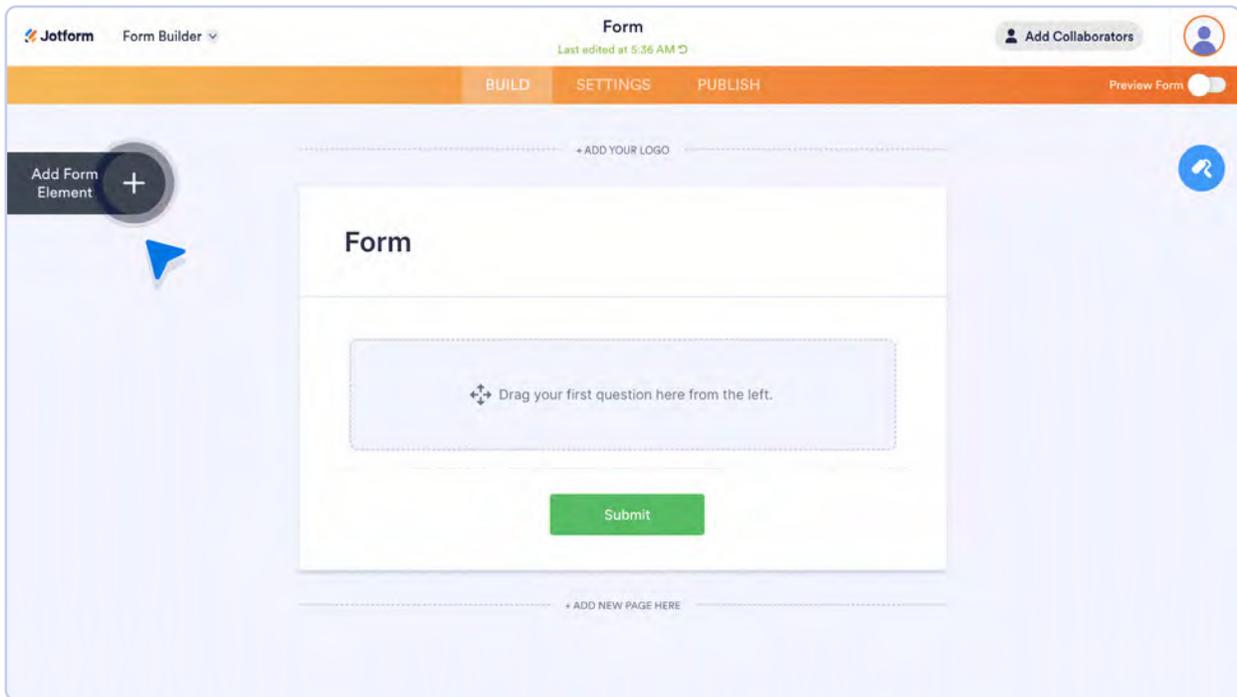
1. Click the **Create Form** button on your My Forms page and then select **Start from Scratch**.



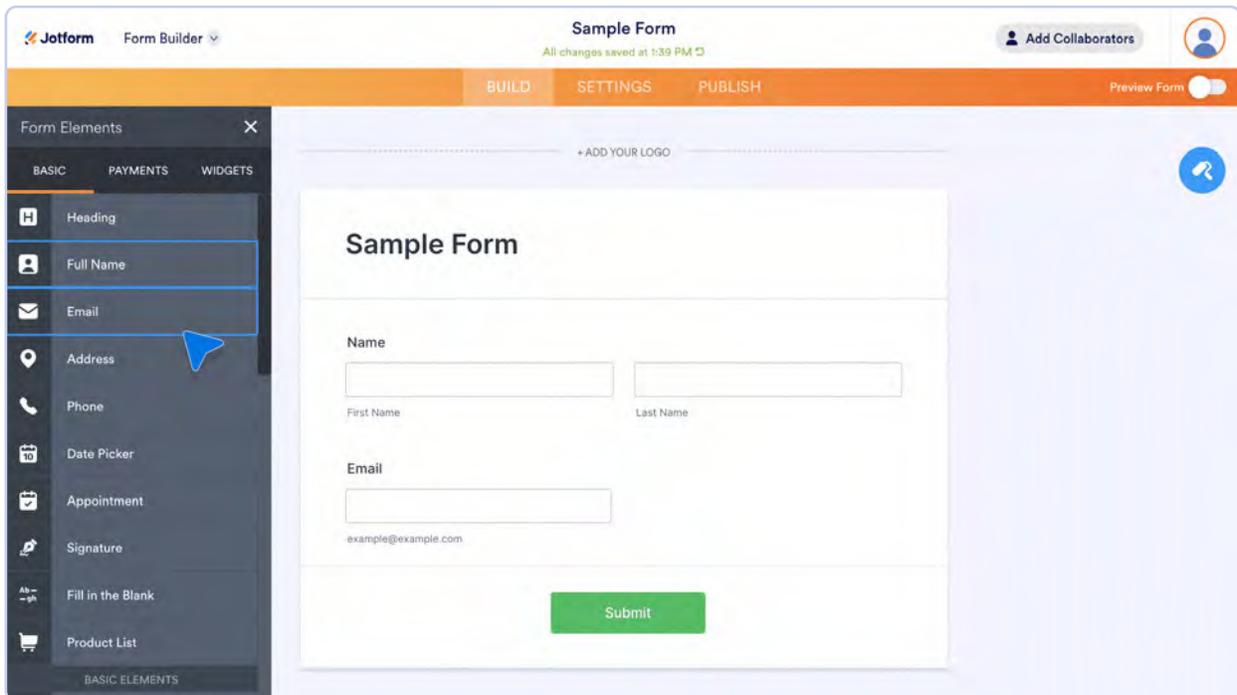
2. Select **Classic Form**.



### 3. Click **Add Form Element**.



### 4. Choose your elements one at a time by clicking on them or dragging them onto your form.



## Classic creativity

We've created a form in mere moments. Now you can spruce up your form with Jotform's abundant customization tools. (We'll talk more about the Form Designer later in this chapter.)

Forms that require more than a handful of basic elements — like job application forms or volunteer application forms — perform better as classic forms in most cases.

Classic forms are ideal for use with Jotform's 250-plus widgets too. Widgets are add-ons that extend the capabilities of your forms. Found within the **Form Elements** menu, widgets enable video recording, social media connectivity, and [much more](#).

### Pro tip



Admins can disable any or all widgets for organizational security concerns. If you see limited widgets or no widgets in the Form Builder, this is likely the reason.

You can always preview your form the way your respondents will see it by clicking on the **Preview Form** slider button at the top right of your screen.

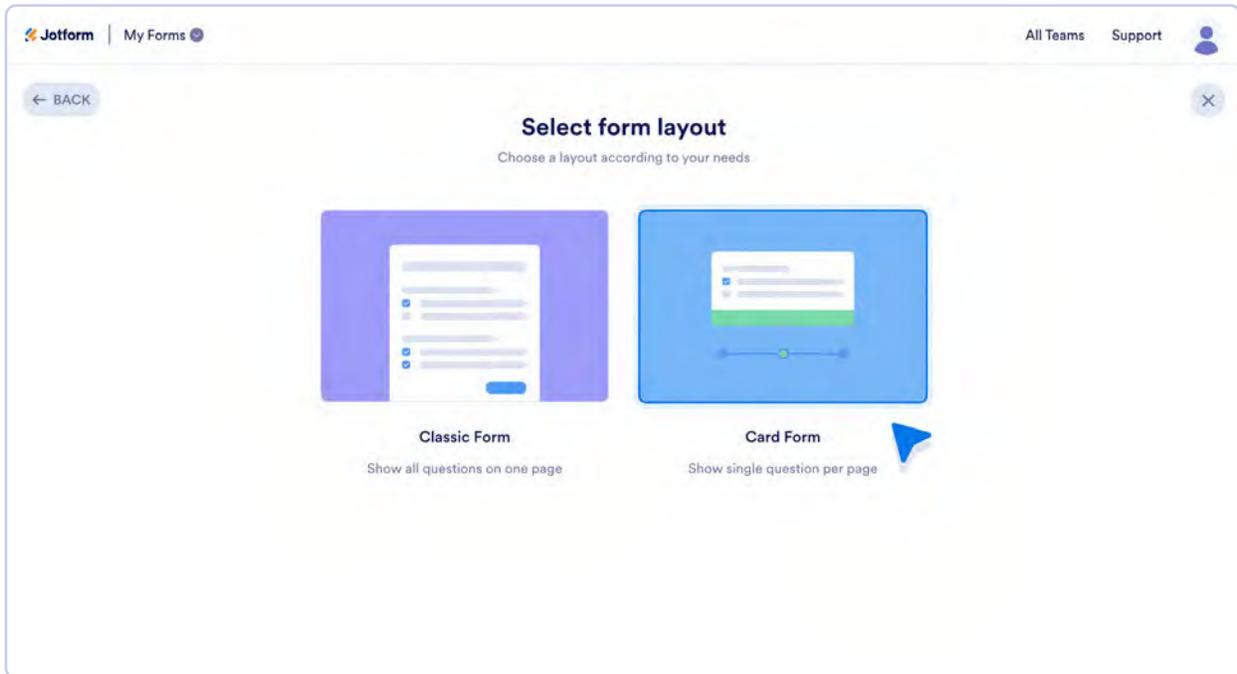
## Jotform Cards

Card forms add pizzazz to ordinary forms. They display questions one at a time. This can be more engaging for many users. It can also prevent users from becoming overwhelmed like they might be if they see a lot of questions at once, which sometimes causes them to abandon the form altogether.

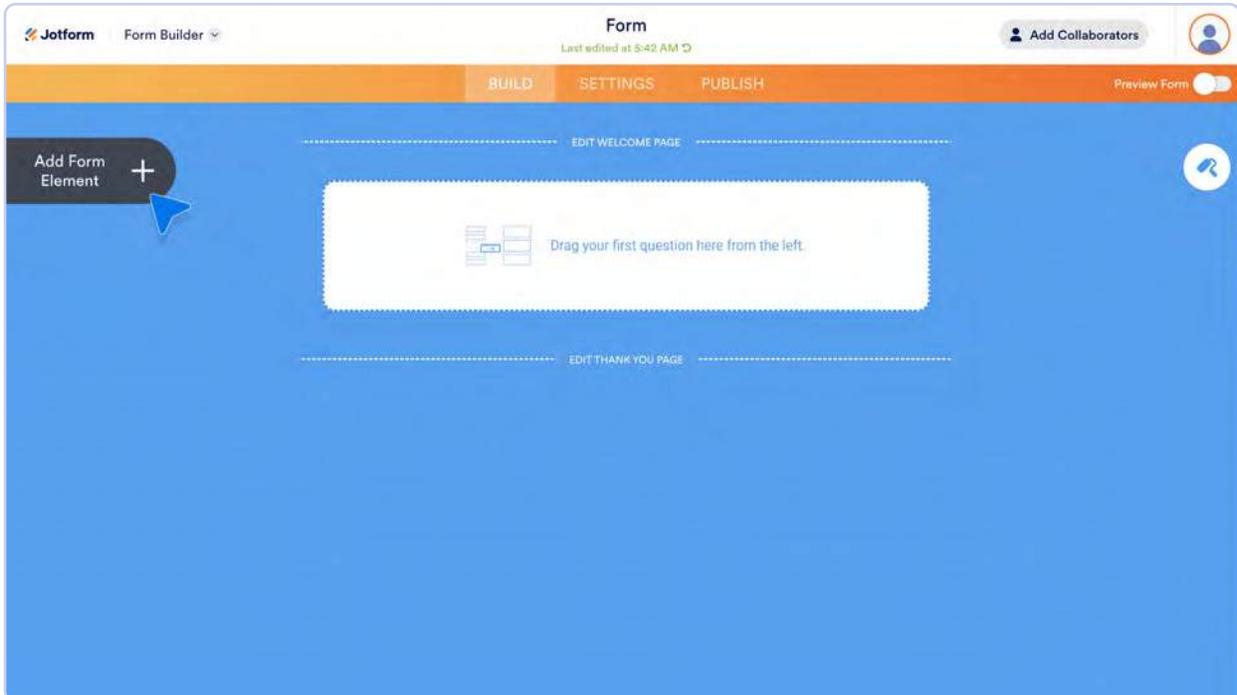
Jotform Cards are fantastic for shorter forms that will be filled out quickly or forms that will likely be filled out on mobile devices. Some popular use cases for card forms include subscription and registration forms, comment or feedback forms, and survey forms.

Here's a step-by-step guide to help you build your first Card form.

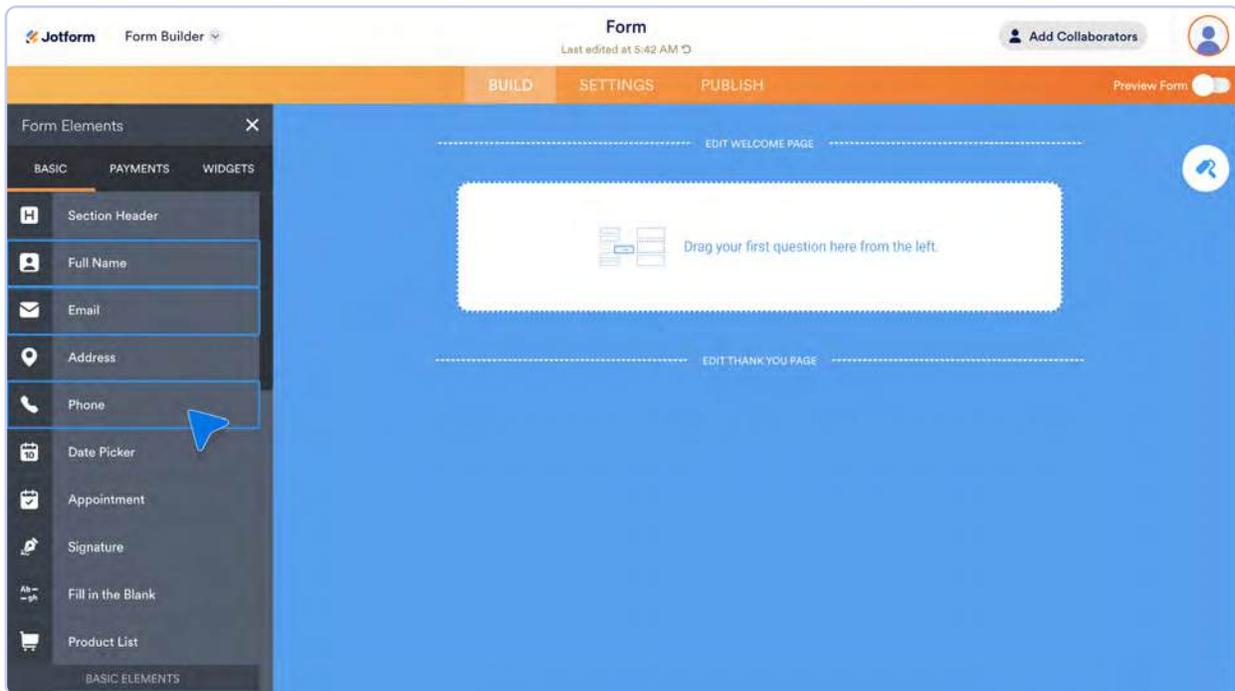
## 1. Select **Card Form**.



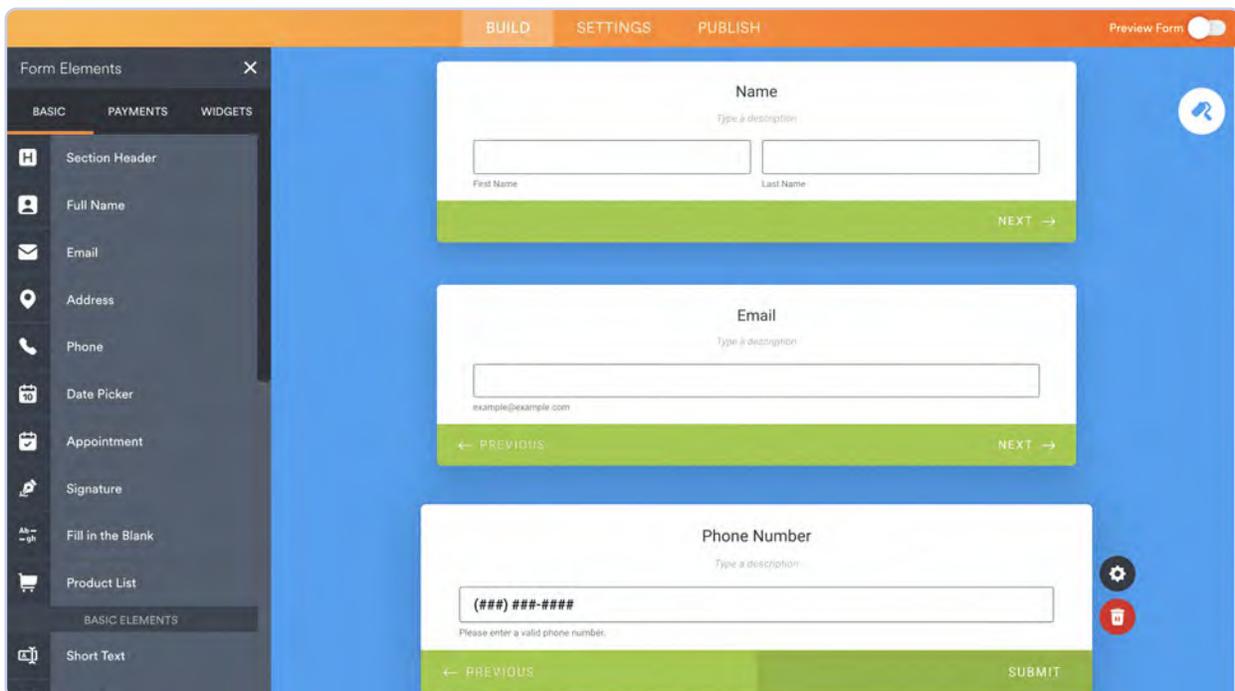
## 2. Click **Add Form Element**.



3. Click or drag and drop to add form elements. Since Card forms work great with just a few form elements, let's select three of them: Full Name, Email, and Phone.

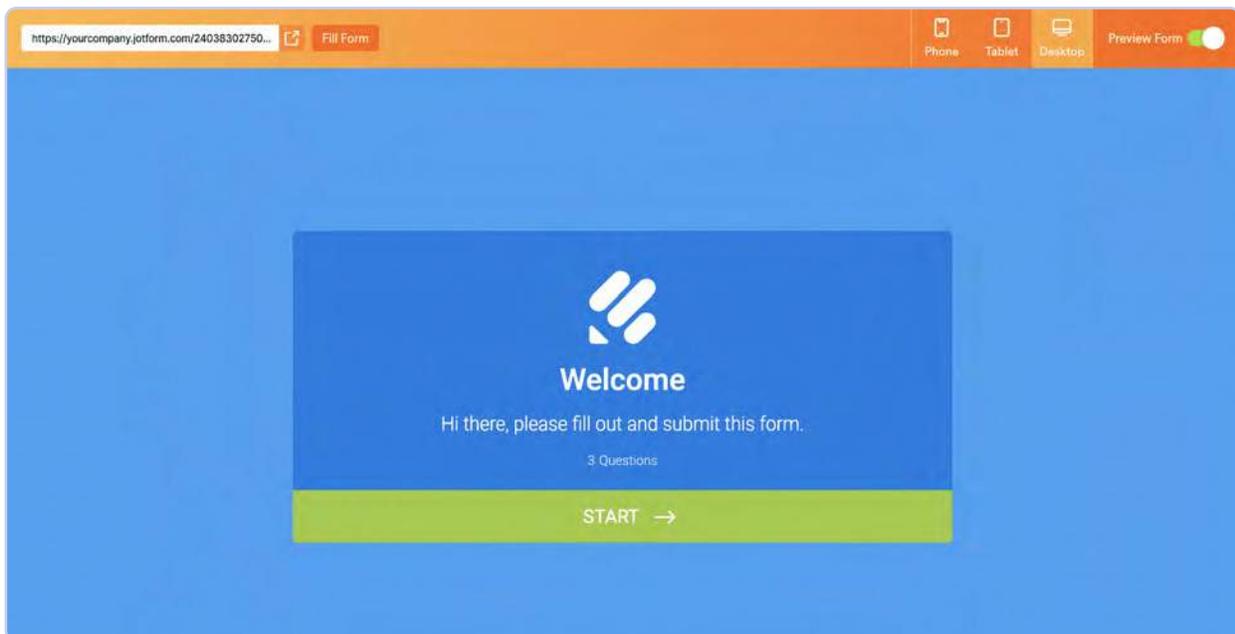


Here's what your form will look like in the Form Builder after you've added the form elements.



Just like that, you've created your first form, and it's ready to share and receive submissions. It's a good idea to preview your form to see what it will look like for those filling it out. Though the screenshot above captures your form as it appears in the Form Builder, with all of the elements on one page, when you share it, each element will appear by itself.

Click the **Preview Form** slider button on the top right of your screen to see the form as your respondents will see it. When viewing your form as a form filler would, you can also view your thank you page, which appears after the form has been completed. (The thank you page can be very valuable. We'll go over its capabilities later in this chapter.)



This screenshot shows a Jotform interface with a blue background. At the top, there is an orange navigation bar containing the URL 'https://yourcompany.jotform.com/24038302750...', a 'Fill Form' button, and device selection icons for Phone, Tablet, and Desktop. A 'Preview Form' toggle is also present. The main content area features the Jotform logo in the top left. Centered on the page is a white form box titled 'Email'. Inside the box, there is a text input field containing the email address 'example@example.com'. Below the input field, there is a green bar with a left-pointing arrow and the text 'PREVIOUS', and a right-pointing arrow and the text 'NEXT'.

This screenshot shows the same Jotform interface as above. The form box is now titled 'Phone Number'. The text input field contains the error message 'Please enter a valid phone number.' Below the input field, the green bar contains a left-pointing arrow and the text 'PREVIOUS' on the left, and the text 'SUBMIT' on the right.

This screenshot shows the Jotform interface after form submission. The main content area is a solid blue rectangle. In the center, there is a green circle containing a white checkmark. Below the checkmark, the text 'Thank You!' is displayed in a large, bold font. Underneath that, in a smaller font, it says 'Your submission has been received!'.

## Playing with Cards

There are some unique, fun form elements that make Card forms stand out even more, like the Emoji Slider rating scale (shown below).

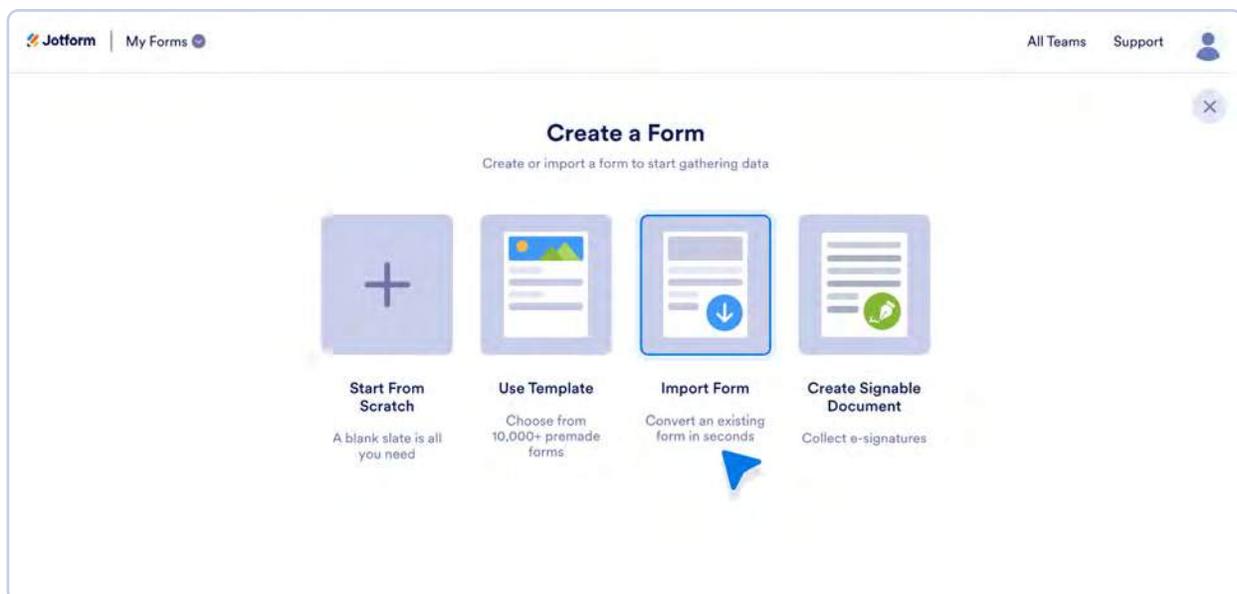
These elements can lend a whimsical feel to the form-filling experience that's a world away from using a pen to fill out a paper form.

### A word about form themes

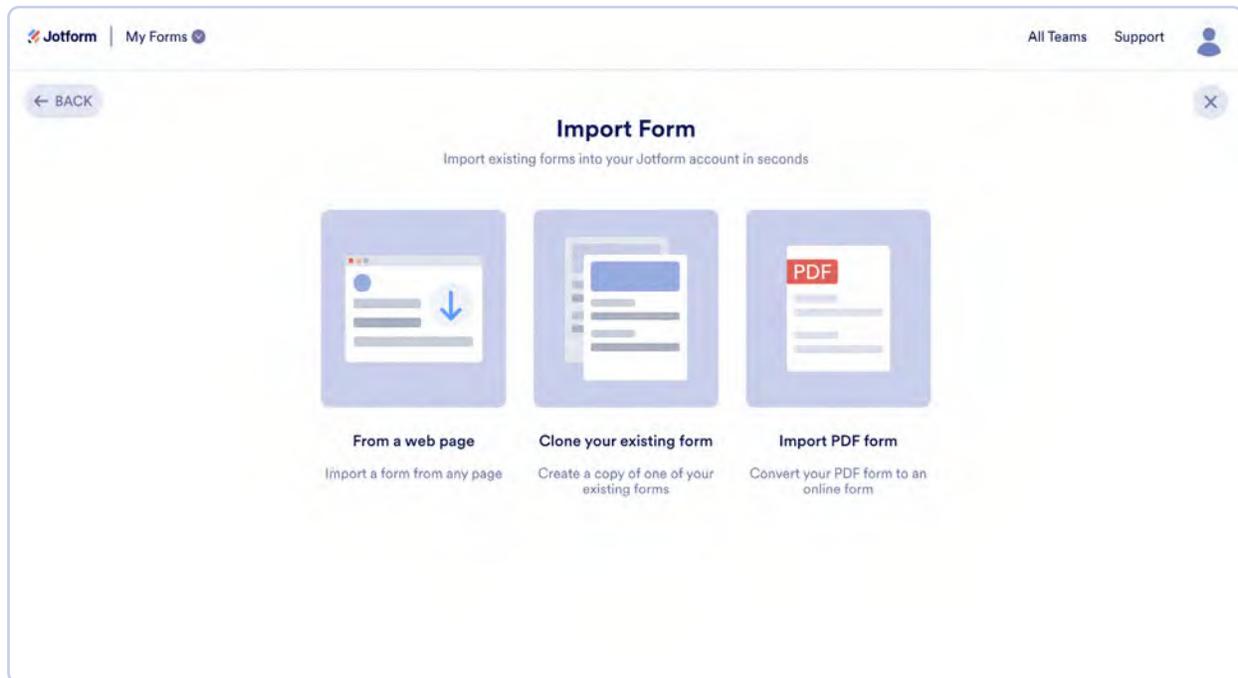
Though we'll dive more into how to beautify your form later in this chapter, form themes provide an easy way to liven up your form when starting from scratch. You'll find them in the Form Designer, accessible via the paint roller icon on the right side of the Form Builder.

## Import forms to the Form Builder

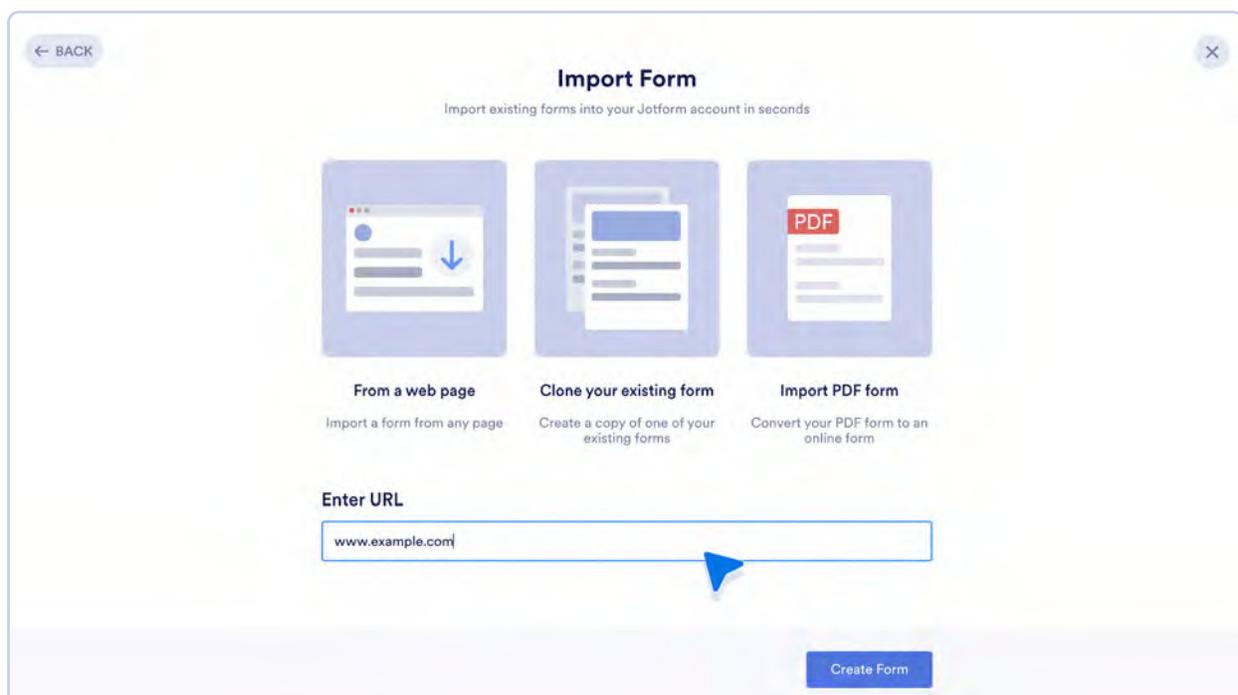
While you can create a brand-new form with Jotform in no time, you may already have an online or PDF form you'd like to use. In this case, you can import that form into Jotform. To get started, select the **Import Form** option in the **Create a Form** menu.



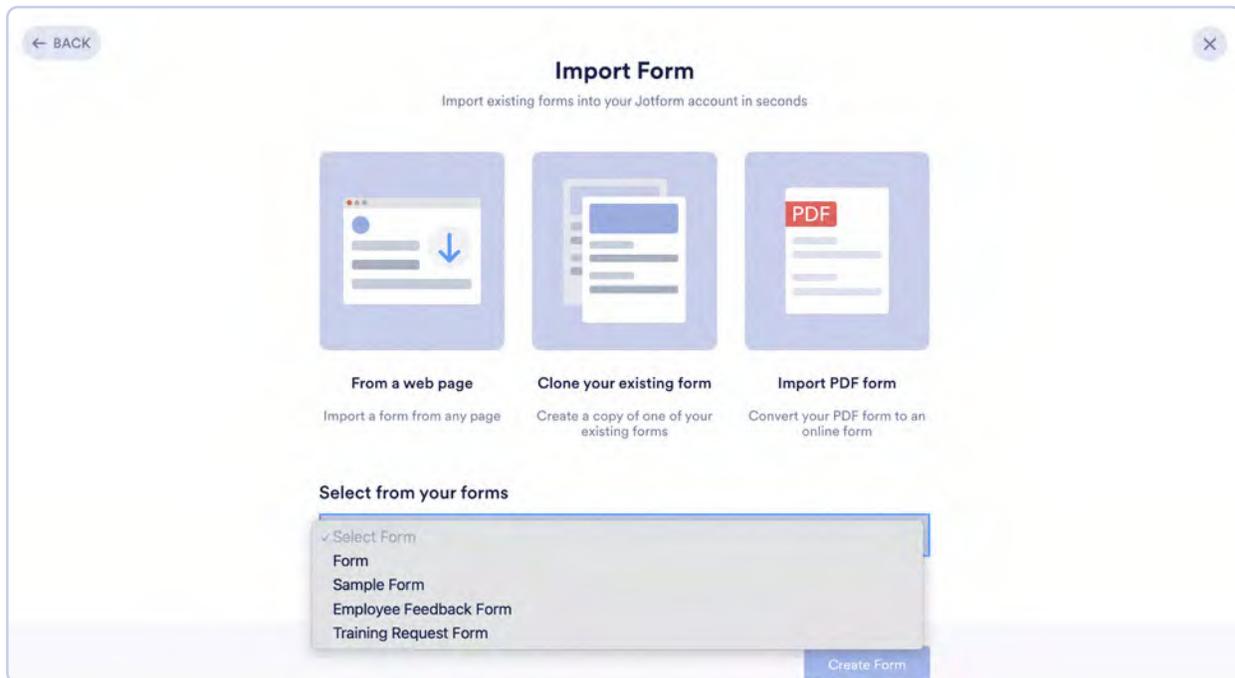
There are three options to choose from when importing a form: You can import a form from a web page, clone an existing form in your Jotform library, or import a PDF form and convert it into an online form.



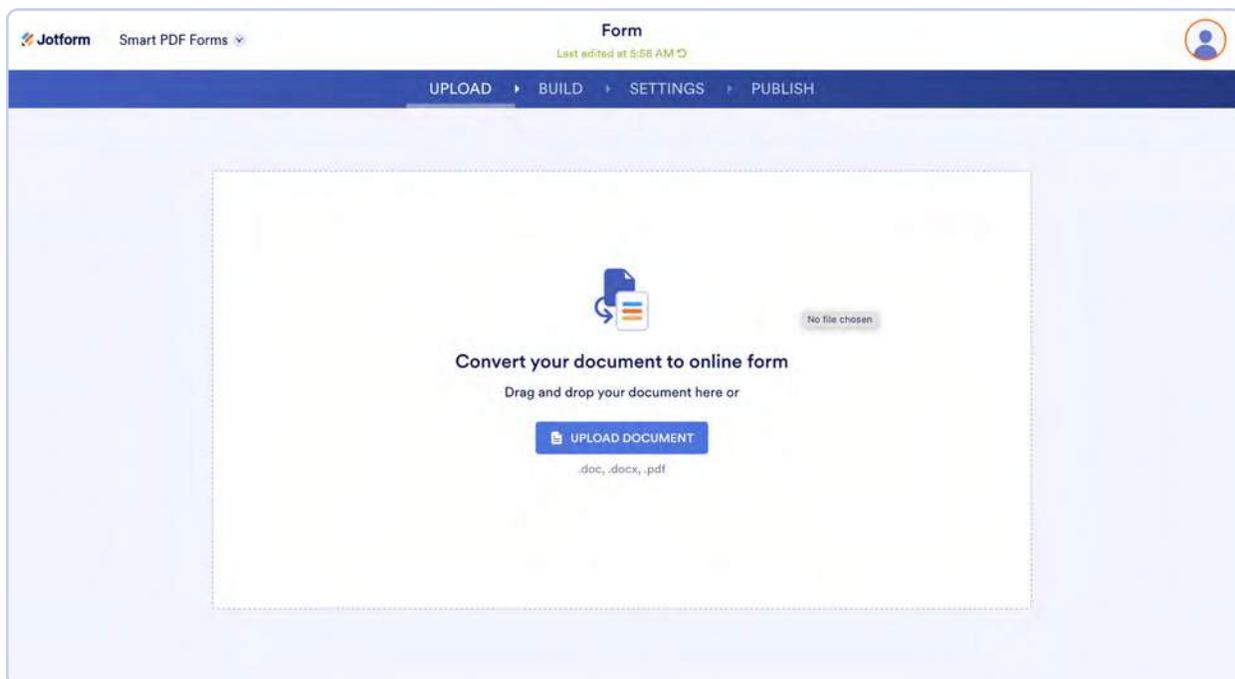
If you import a form from a web page, you'll be prompted to enter that form's URL directly on the **Import Form** page. Enter the URL, click the **Create Form** button, and you'll be redirected to the Form Builder, with your form imported and ready to edit.



If you'd like to clone an existing form, click the **Clone your existing form** option. A dropdown menu containing the forms from your My Forms library will appear. Select the form you want to clone and click the **Create Form** button to complete the import process.



To import a PDF form and transform it into a versatile online form, click the **Import PDF form** option. Unlike the previous two scenarios, you'll be redirected to a different screen.



Click the **Upload PDF Form** button to upload the PDF form from your computer, or drag and drop the file into the Form Builder. When finished, your static PDF form will appear in the Jotform Form Builder, ready to be enhanced with Jotform's customization options.

## Form templates

With more than 10,000 ready-made form templates, Jotform makes it easy to build a form with the click of a button. While that's a lot of templates, we don't want you to feel overwhelmed. Templates are divided into three main categories: **Types**, **Industries**, and **Professions**. Use the search bar to find the ideal template for your form.

Some popular template Types are order forms, registration forms, and payment forms. As for Industries, business, education, and human resources forms are very sought-after. Forms listed under Professions include forms for teachers, photographers, recruiters, merchants, and many more.

You can edit a form template in the Jotform Form Builder, just as if you started building the form from scratch. So if you see a template that fits your needs but isn't perfect, you can customize it by adding, deleting, or altering form elements or personalizing the form's style. You can also toggle between Classic templates and Card templates when searching for a template. With each option, you can preview the template before you make your selection.

### Did you know?



Admin users can create their own templates and share them with their teams and other admin users. This provides consistent branding on your forms across your organization.

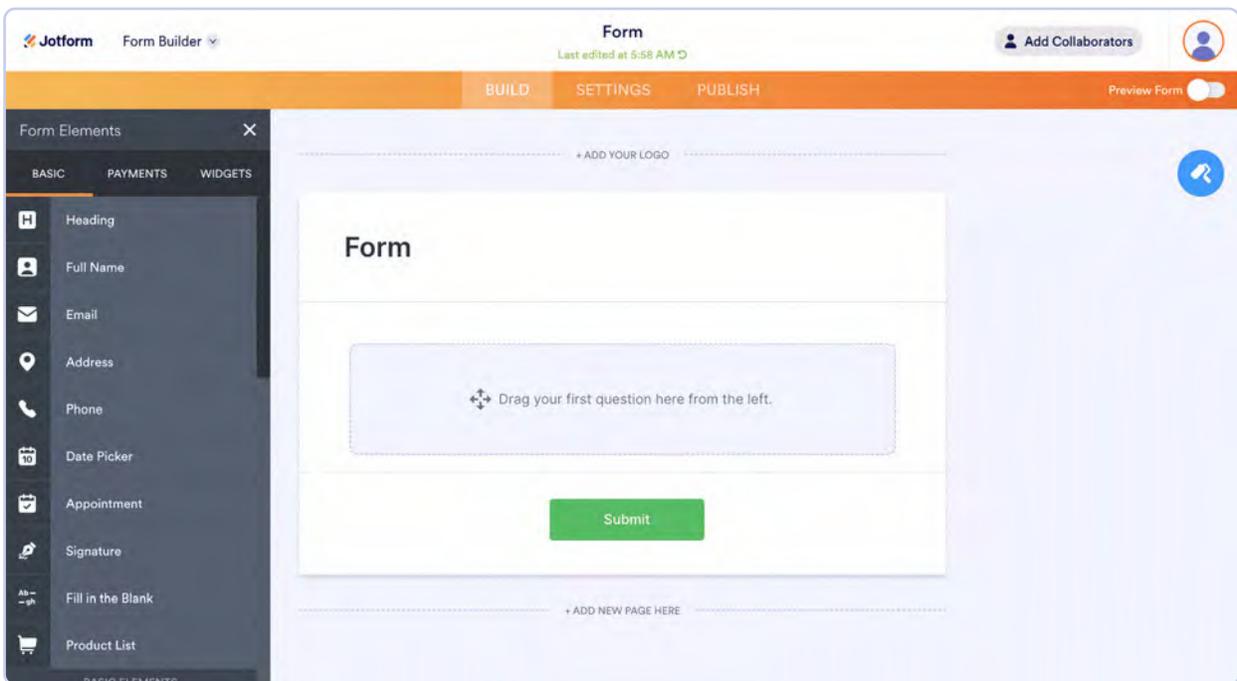
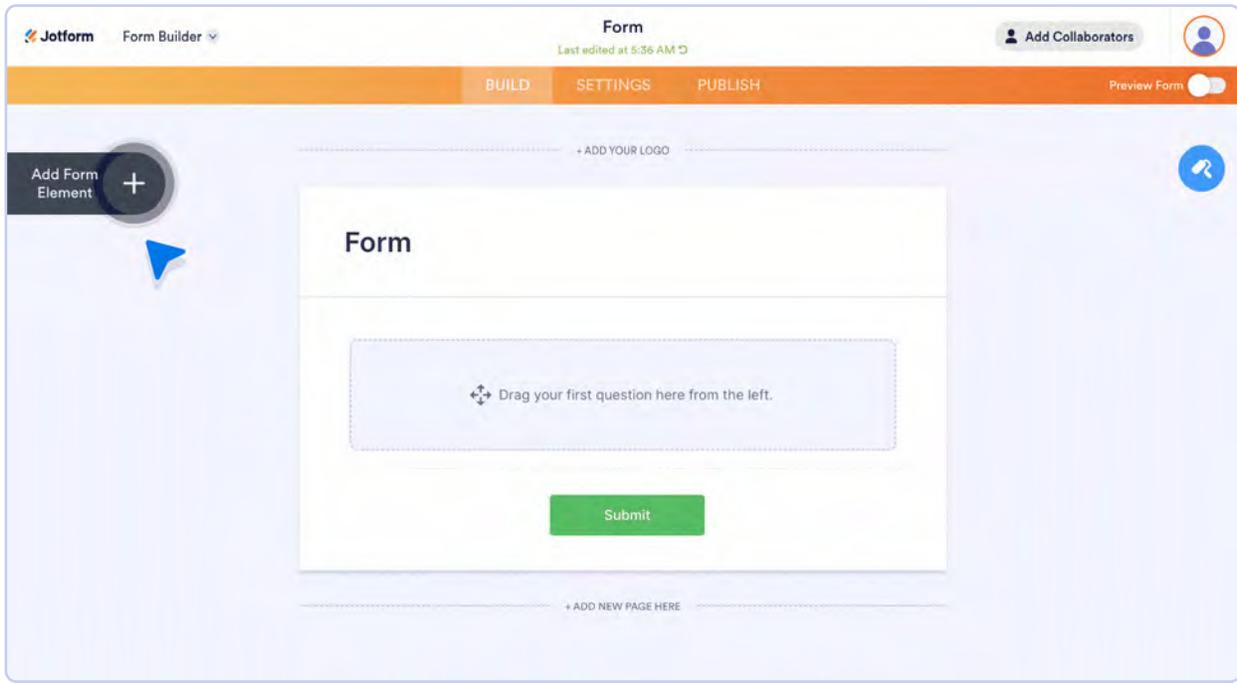
## The Form Builder

The Form Builder is where you make your forms come to life. Though the possibilities for creation are seemingly endless, the Form Builder is also exceptionally simple. As you'll recall, we used it when we created a Card form and a Classic form in seconds.

In that case, we used three of the most basic form elements to create a form — Full Name, Email, and Phone. Those three elements — while popular for obvious reasons — are just the beginning when it comes to building your form.

## Form elements

While building your form, click the **Add Form Element** button on the left side of the Form Builder. The Form Elements menu will appear on the page.



The elements are divided into three columns: Basic, Payments, and Widgets. The widgets and the payments can be disabled by an Admin user, so it's possible only Basic elements will be visible. Let's take a closer look at these categories.

### The 10 most popular form elements

- |  |   |
|--|---|
|  1. Submit Button |  6. Long Text      |
|  2. Heading       |  7. Date Picker    |
|  3. Full Name     |  8. Phone          |
|  4. Short Text    |  9. Address        |
|  5. Email         |  10. Single Choice |

## Basic

Basic elements include, well, the basics: Full Name, Email, and Address. But there are other elements that can take your form to another level.

These elements are divided into Basic, Survey, and Page elements. Basic elements include

- Date Picker
- Fill in the Blank
- Appointment
- Image
- Multiple Choice
- Captcha

There's also a Product List element designed for retail sales forms. (With Jotform Enterprise, you can easily create a mobile app for your retail forms that also works on desktops. We'll discuss this more in [Chapters 6](#) and [10](#).)

Input Table, Star Rating, and Scale Rating elements are listed in the Survey elements section. Page elements help refine your form's appearance, with Page Break, Divider, and Section Collapse elements.

Among the most popular and practical form elements are File Upload and Signature.

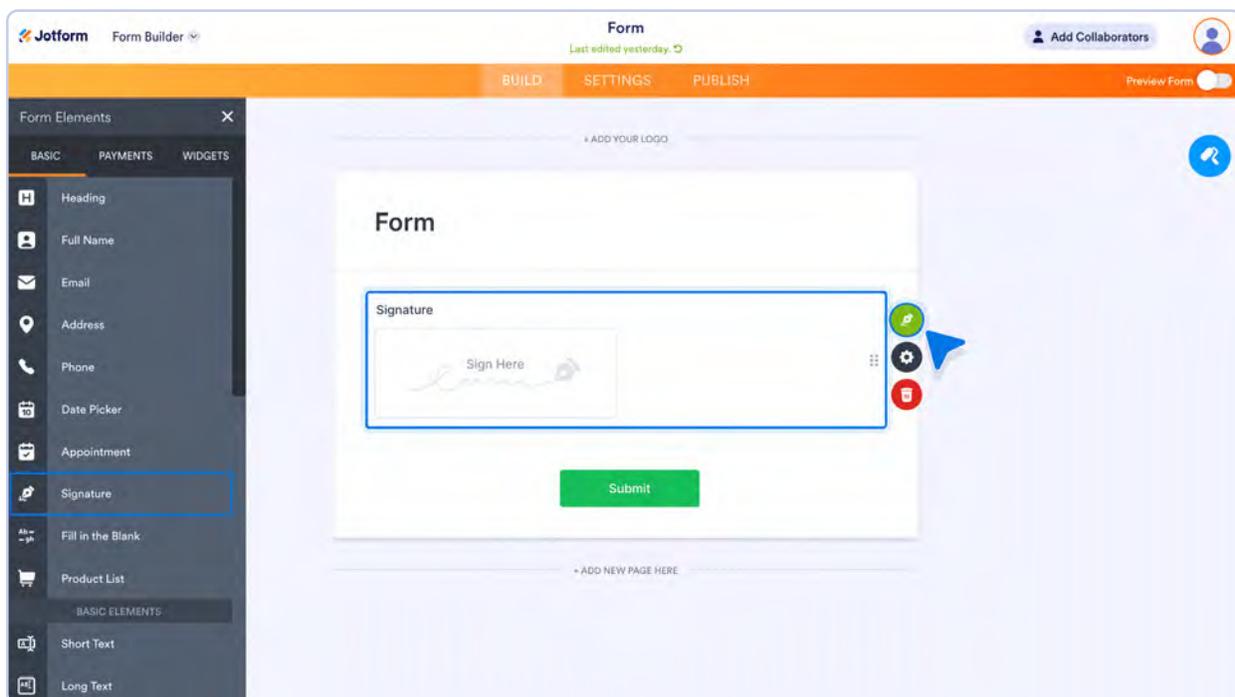
## Signature and Jotform Sign

It's no surprise that the Signature element is heavily used. We're dealing with forms, after all. Most electronic signatures are just as valid as an agreement signed by hand in the United States and Europe, though laws in some other countries vary (and you should always double check).

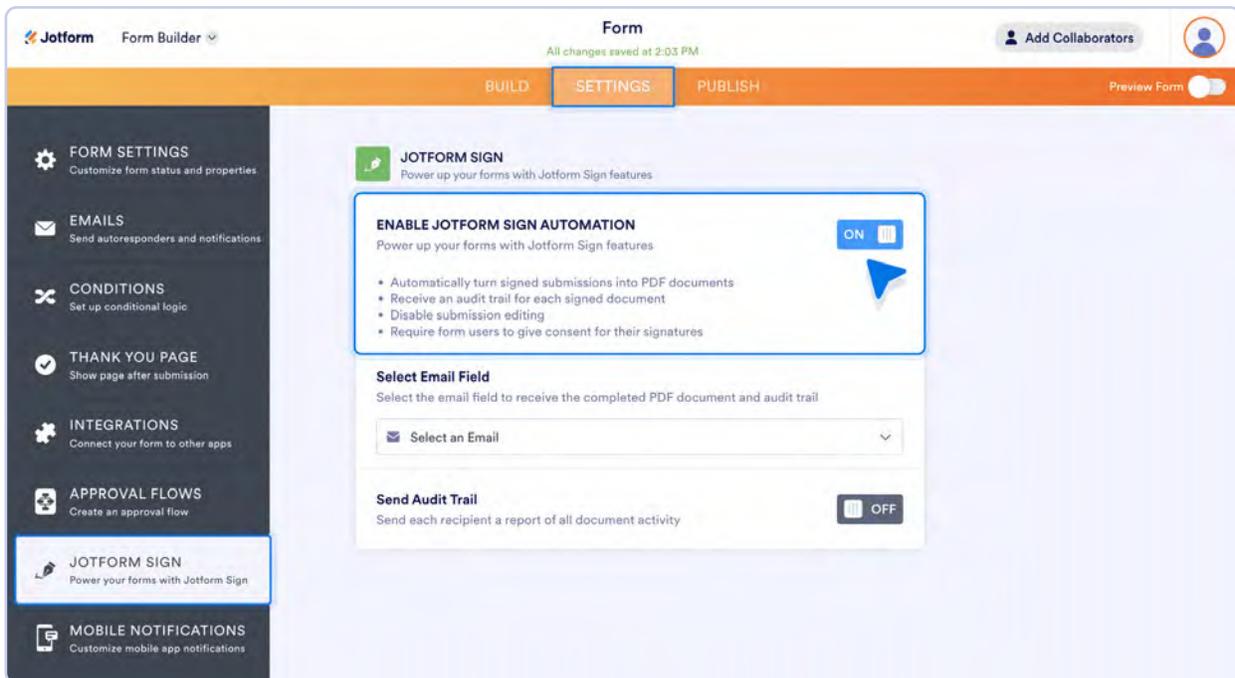
The Signature element is located in the list of Basic elements. After a few swift mouse clicks, your forms can capture signatures from form fillers.

The Signature element also provides a way to take advantage of Jotform Sign automation. It's easy to enable Jotform Sign to collect e-signatures on your forms. Plus Jotform Enterprise customers can have an unlimited number of signed documents, which means reduced costs and complexity for chief financial officers and IT admins.

Once the element is added, find the **Sign Automation** button. This will take you to the **Jotform Sign** tab on the form Settings page.



In the Jotform Sign settings, click the toggle button at the top of the menu to activate Jotform Sign automation. You can send a PDF of your signed document to an email field on the form, or turn on the Audit Trail option at the bottom of the menu.



## File Upload

Like e-signatures, file uploads are extremely useful in online forms. The File Upload element allows users to upload nearly 20 different types of files directly to your form, including

- PDF
- DOC
- DOCX
- XLS
- XLSX
- CSV
- TXT
- RTF
- HTML
- ZIP
- MP3
- WMA
- MPG
- FLV
- AVI
- JPG
- JPEG
- PNG
- GIF

In the Element Settings, you can indicate which types of files you'll accept. To accept all file types, enter an asterisk (\*).

If you wish, you can set a limit for how many files your form will accept. Another option allows you to limit the file size that respondents can upload. Additionally, Jotform can automatically import your uploaded files to Dropbox, Google Drive, or Box for secure storage.

## Payments

Jotform's payment integrations showcase the power of our forms. There are more than 40 payment gateways to choose from, including PayPal, Apple Pay, Google Pay, Square, and Stripe. ACH payment processing is available as well, featuring an ACH option through Jotform's Square integration.

With so many gateways available, there are solutions tailored for specific regions and use cases. For example, Worldpay and Mollie cater to European markets; Afterpay (known as Clearpay in the UK) facilitates buy now pay later (BNPL) transactions; and PayPal's subscription feature collects regular online payments.

Admin users can customize payment integration options in the Form Builder. This will help organizations meet compliance and security requirements.

## Widgets

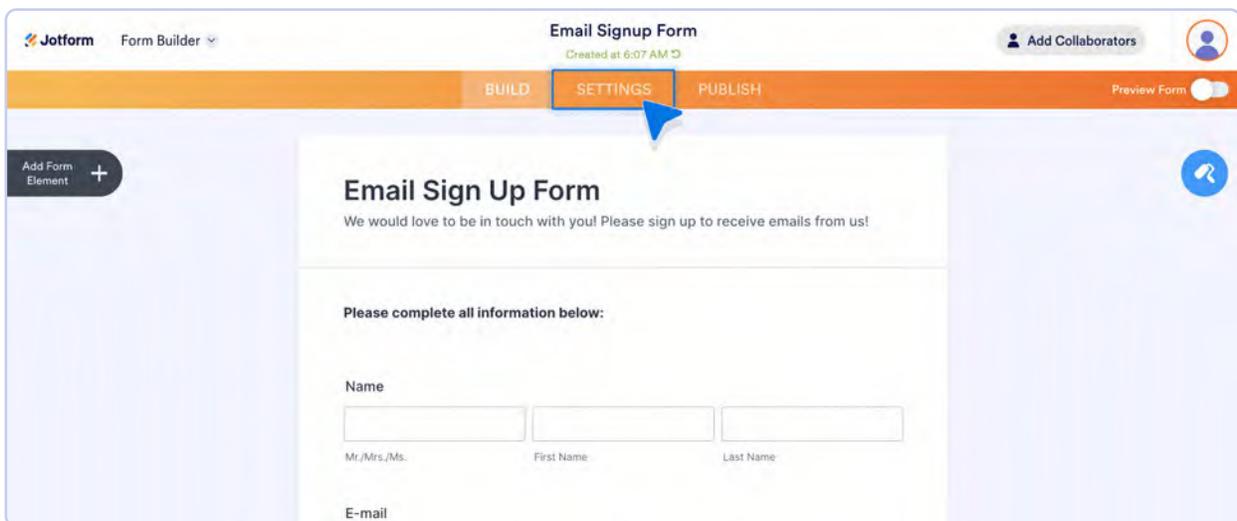
The third column of Form Elements contains Jotform's widgets, which add functionality — like video, social media, or maps — to your form. Admins can customize available widget options in the Form Builder. As with the payment options, this can help organizations meet compliance or security requirements.

There are hundreds of widgets to choose from. These features not only add to your form's capabilities, they also make your form stand out from the crowd.

Some often-used widgets include the Take Photo widget, which allows form fillers to take photos directly from your form, the Spreadsheet to Form widget, and the Image Gallery widget. Widgets for popular social media networks, such as Facebook, Instagram, LinkedIn, and X (formerly Twitter), provide instant familiarity and remind form fillers that this is no ordinary form.

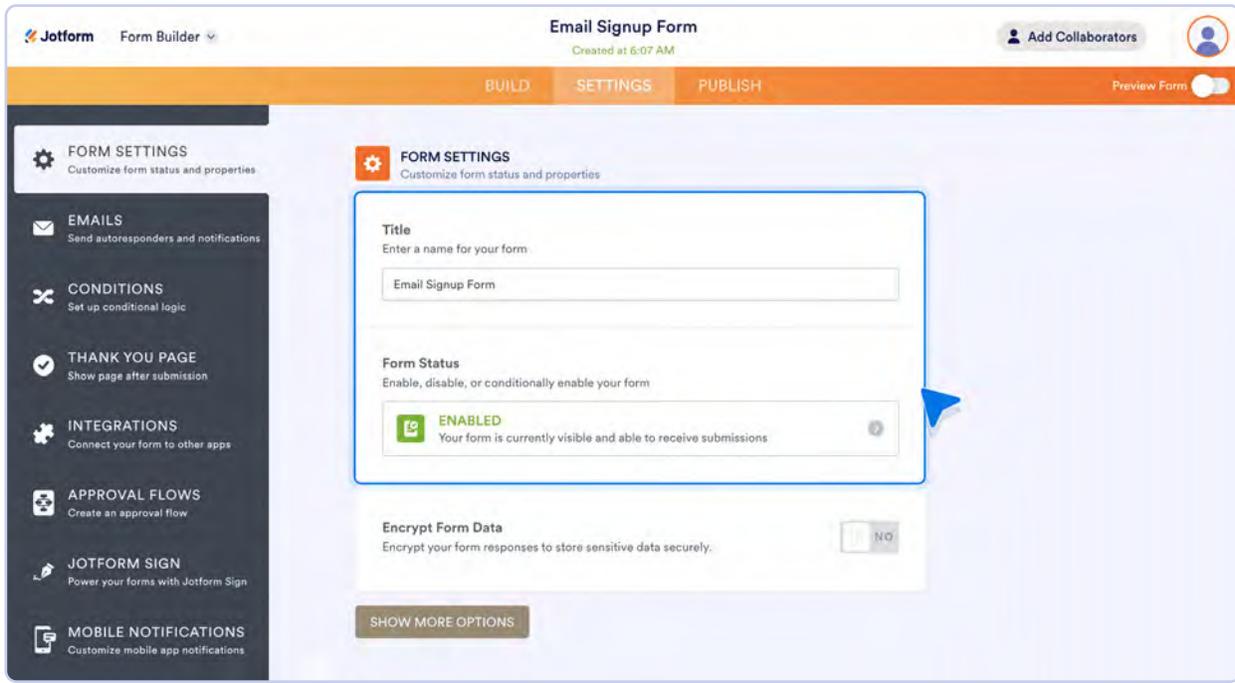
## Nifty form settings

Once your form looks good, it's time to explore Jotform's Form Settings. Click on the **Settings** tab at the top of the page. This is where you can toggle between building your form, refining your settings, and selecting various publishing options, which we'll get to later.



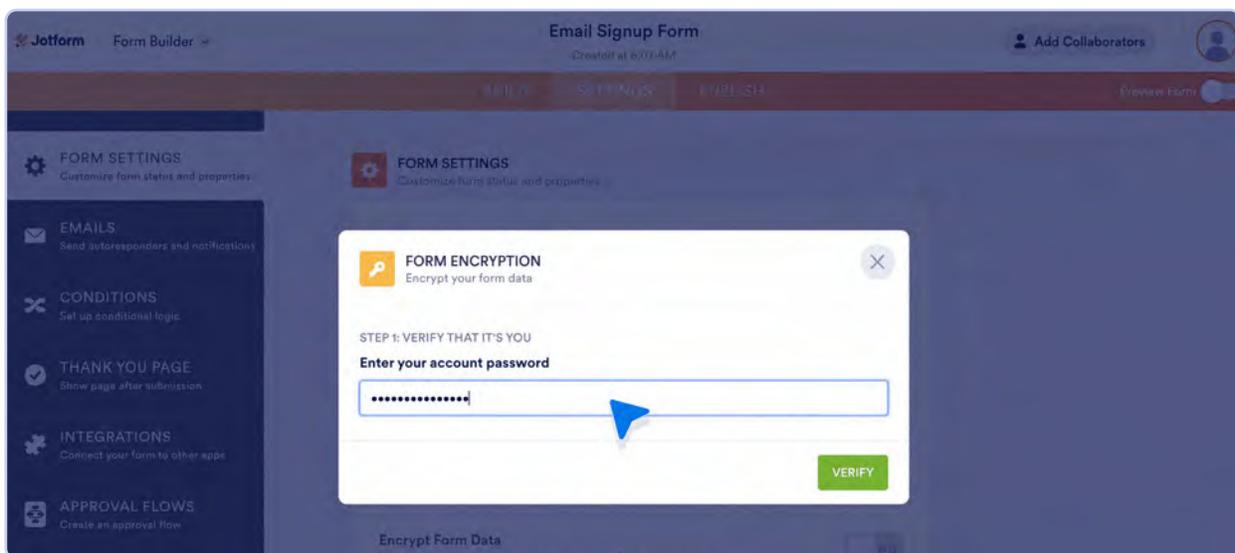
The screenshot displays the Jotform Form Builder interface for an "Email Sign Up Form". At the top, the Jotform logo and "Form Builder" are visible on the left, and "Email Sign Up Form" with "Created at 6:07 AM" is on the right. A navigation bar contains "BUILD", "SETTINGS" (highlighted with a blue arrow), and "PUBLISH" tabs. A "Preview Form" toggle is on the far right. On the left side, there is an "Add Form Element" button with a plus sign. The main form area shows the title "Email Sign Up Form" and the text "We would love to be in touch with you! Please sign up to receive emails from us!". Below this, it says "Please complete all information below:" followed by input fields for "Name" (split into "Mr./Mrs./Ms.", "First Name", and "Last Name") and "E-mail".

Three basic settings will appear: Title, Form Status, and Encrypt Form Data. Change the text in the **Title** box to create a custom name for your form. Click the dropdown **Form Status** menu to enable or disable your form. You can disable your form on a particular date, at a particular submission count, or use a combination of both thresholds.



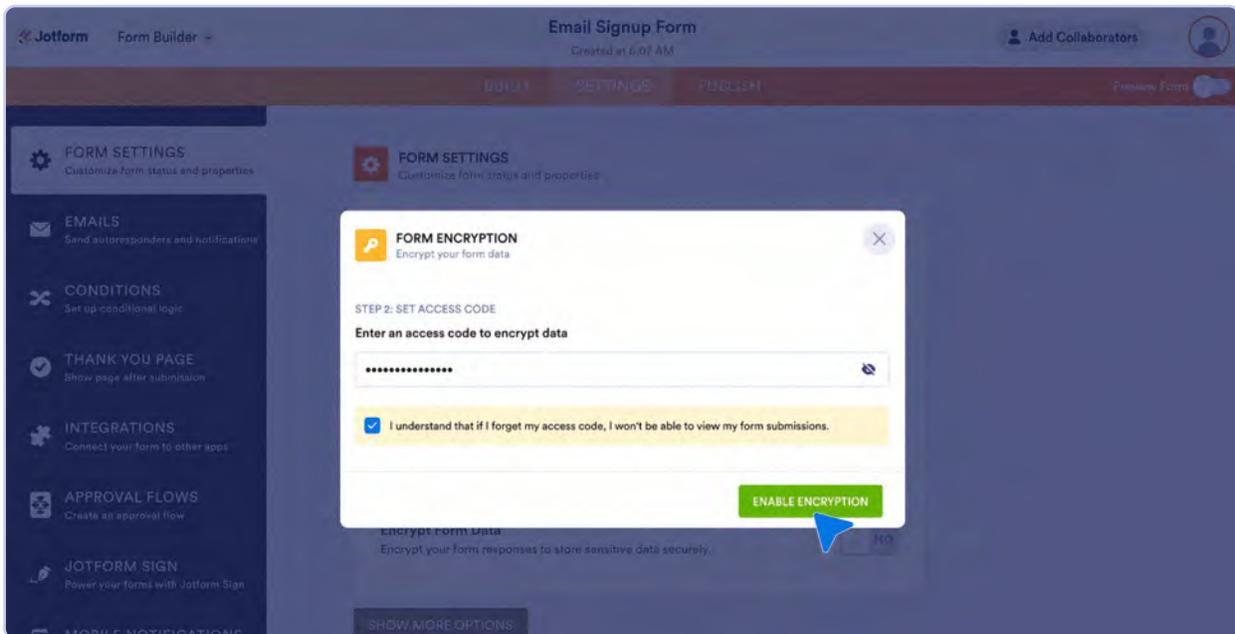
The screenshot shows the 'Form Settings' page in the Jotform Form Builder. The form is titled 'Email Signup Form'. The 'Form Status' is set to 'ENABLED', with a sub-message: 'Your form is currently visible and able to receive submissions'. The 'Encrypt Form Data' option is currently turned off, with a 'NO' toggle. A blue arrow points to the 'Form Status' dropdown menu.

Activate the **Encrypt Form Data** option by switching the toggle button to the on position. Once activated, enter your account password and click the **Verify** button.

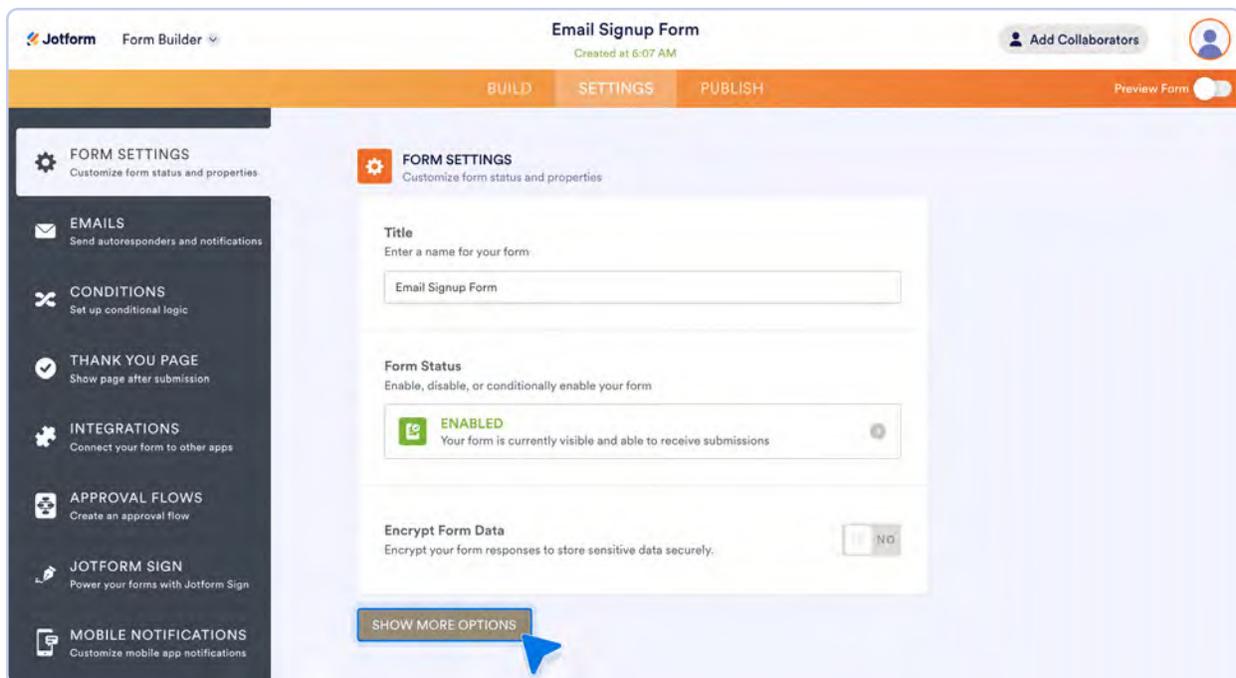


The screenshot shows the 'Form Encryption' dialog box. It prompts the user to 'Enter your account password' and includes a 'VERIFY' button. A blue arrow points to the password input field.

After verifying your password, set an access code for your encrypted data. Check the box next to the statement acknowledging that if an access code is lost, it will be impossible to view encrypted submissions. Remember to record your access code somewhere safe and click **Enable Encryption**.



Below those three form settings, there's a button labeled **Show More Options**.



Click on this button to open a menu containing 16 additional form settings. Some notable options include changing the language of your form, allowing form fillers to edit their submissions or continue a form later, and setting your submissions to delete automatically.

Here, you can enable password protection to limit access to your form. You can also limit access to your form by enabling the single sign-on login setting built exclusively for Jotform Enterprise users. Furthermore, all users can ensure unique submissions by checking cookies and/or IP addresses.

## Beautify and customize your form

With Jotform, you have the power to make your forms look however you want them to. Go to the **Form Designer** by clicking on the paint roller icon on the right side of the Form Builder. Once in the Form Designer, you can choose from a variety of preset color schemes, styles, and themes. If you have a specific vision for how you want your form to look, you can personalize it with your own hex color codes and custom spacing.



### Did you know?

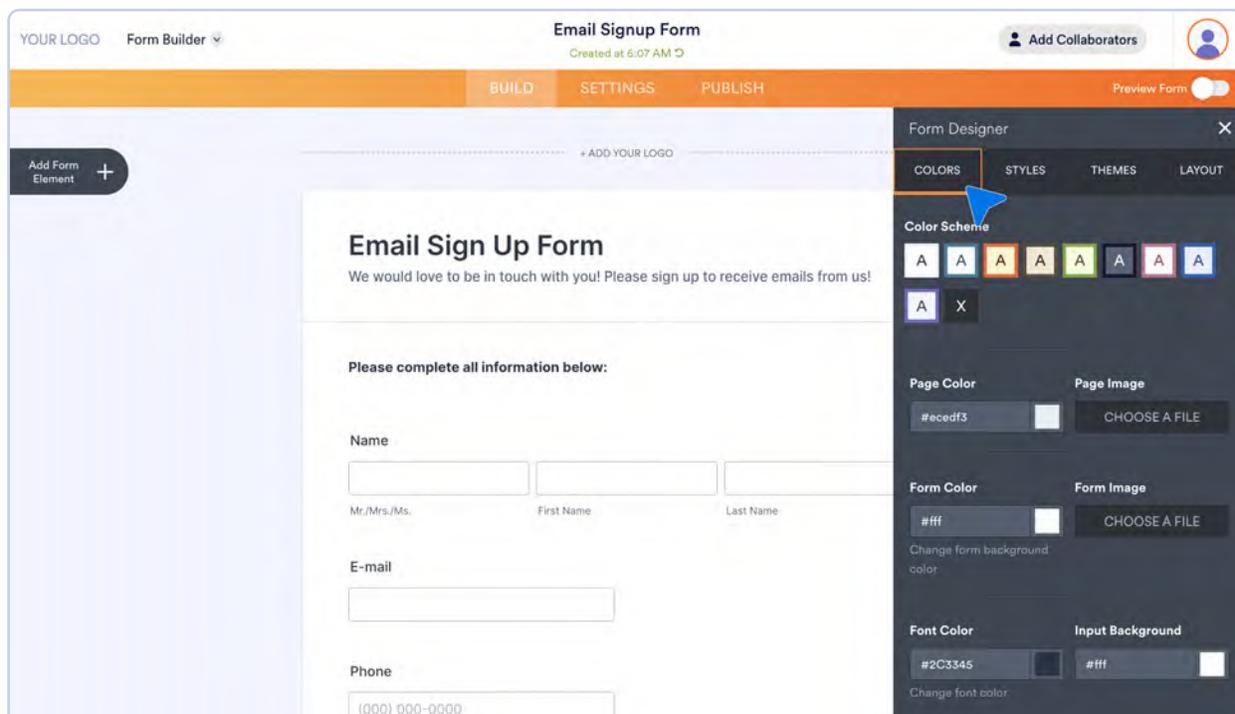
Thanks to the myriad hex color codes available, the Form Designer provides nearly 17 million different color combinations for your form!

Let's take a closer look at the tabs within the Form Designer.

## Colors and White Labeling

In the **Colors** tab, you can make customizations or use Jotform's preset color schemes. If you have a hex color code that you'd like to use, copy and paste it into the color fields.

Form backgrounds aren't limited to color schemes. If you'd like to use an image as your form's background, you can do so by uploading files to the **Page Image** and **Form Image** fields.



For ultimate customization, you can white label your forms to create a seamless customer experience that showcases your company. Without coding, you can fully personalize forms to match your branding, create custom form URLs, and even use a custom domain. There are also white labeling options available to customize Jotform Apps and your entire platform experience, but we'll go into detail on those in the relevant chapters.

If your organization serves others in a B2B capacity, or if you manage multiple businesses or franchises, you can use the white labeling capabilities of Jotform Enterprise to create a custom experience for each of your clients. By [partnering with Jotform Enterprise](#) you can leverage the platform as an extension of your business to create new services and revenue streams.

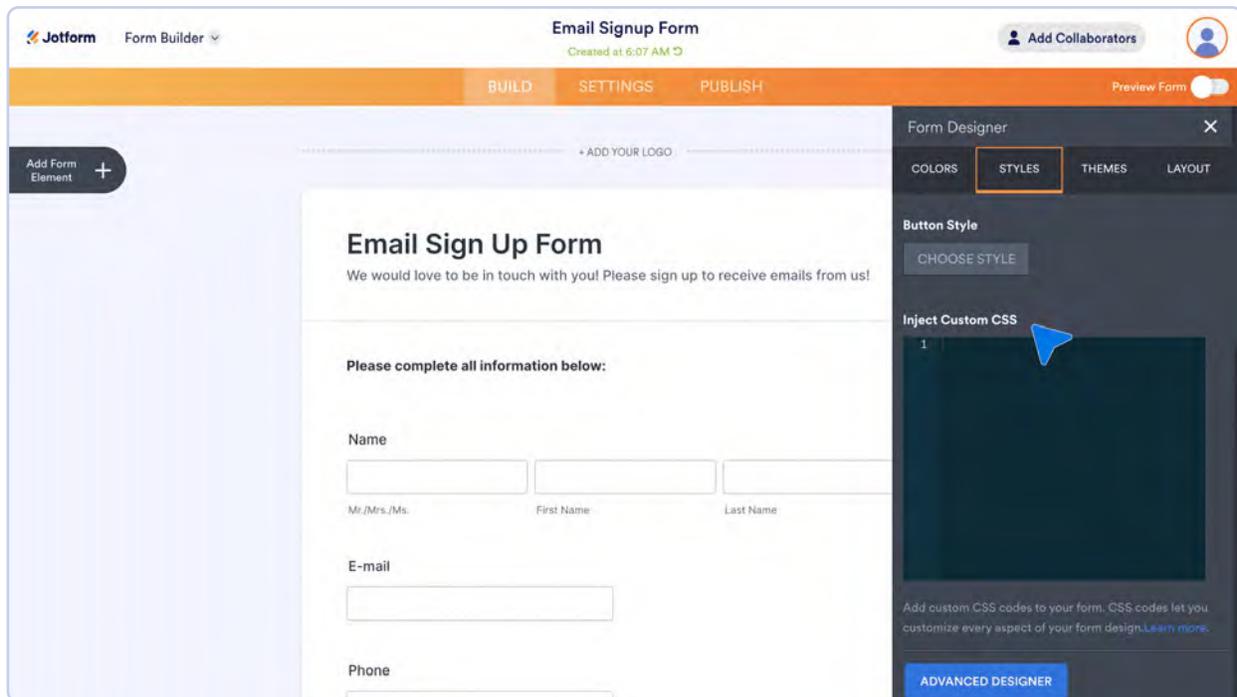
## Styles

In the **Styles** tab, you can resize your form. You can also customize the font and font size, and change the style of your Submit button. To adjust the style of the form to your liking, use the dropdown menus and arrow keys to manipulate the styles to your exact specifications. You can also inject custom CSS into your form, like Rachel Fugate, web designer at the Arbor Day Foundation.

“I created a boilerplate with all the CSS and primary form fields that I wanted, so anytime a form is requested, I can take off the fields I'm not using and add any additional styling at the bottom of the CSS file. Everything's consistent, the form matches our branding, and you don't notice that it's an additional layer.”

— Rachel Fugate, Web Designer, **Arbor Day Foundation**

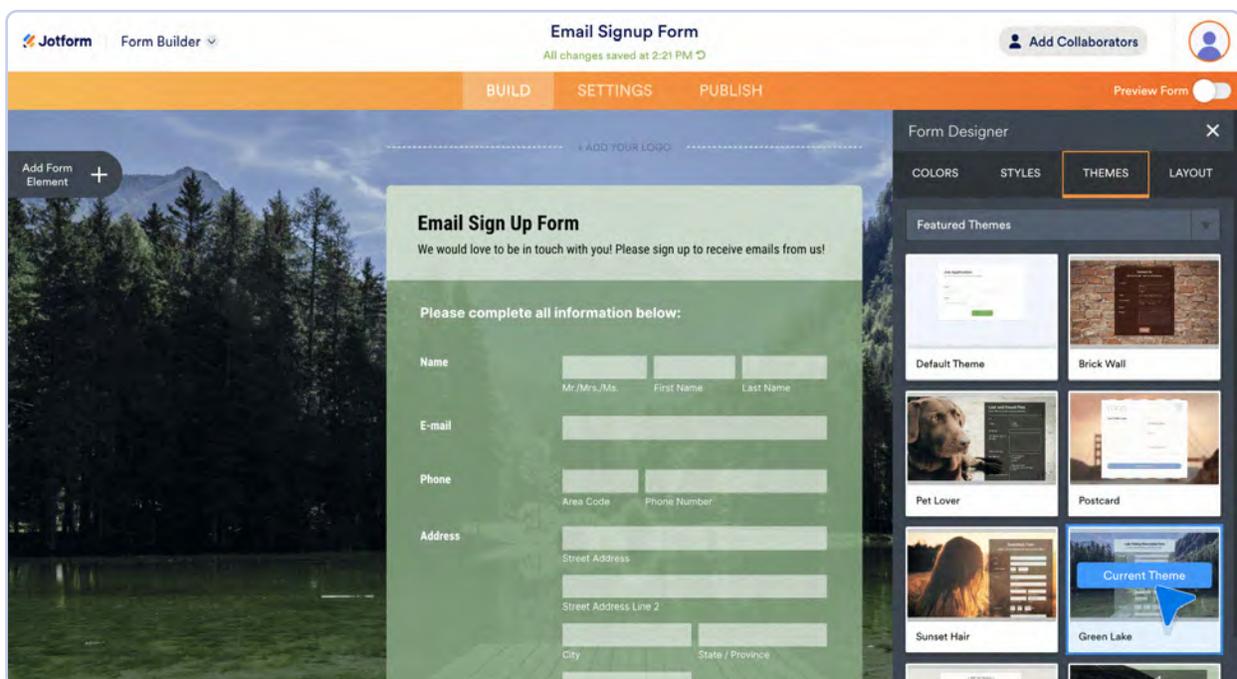
To use the custom CSS option, find the **Inject Custom CSS** field at the bottom of the Styles menu. (Please note that you can inject custom CSS only on Classic forms; the functionality isn't available for Card forms.)



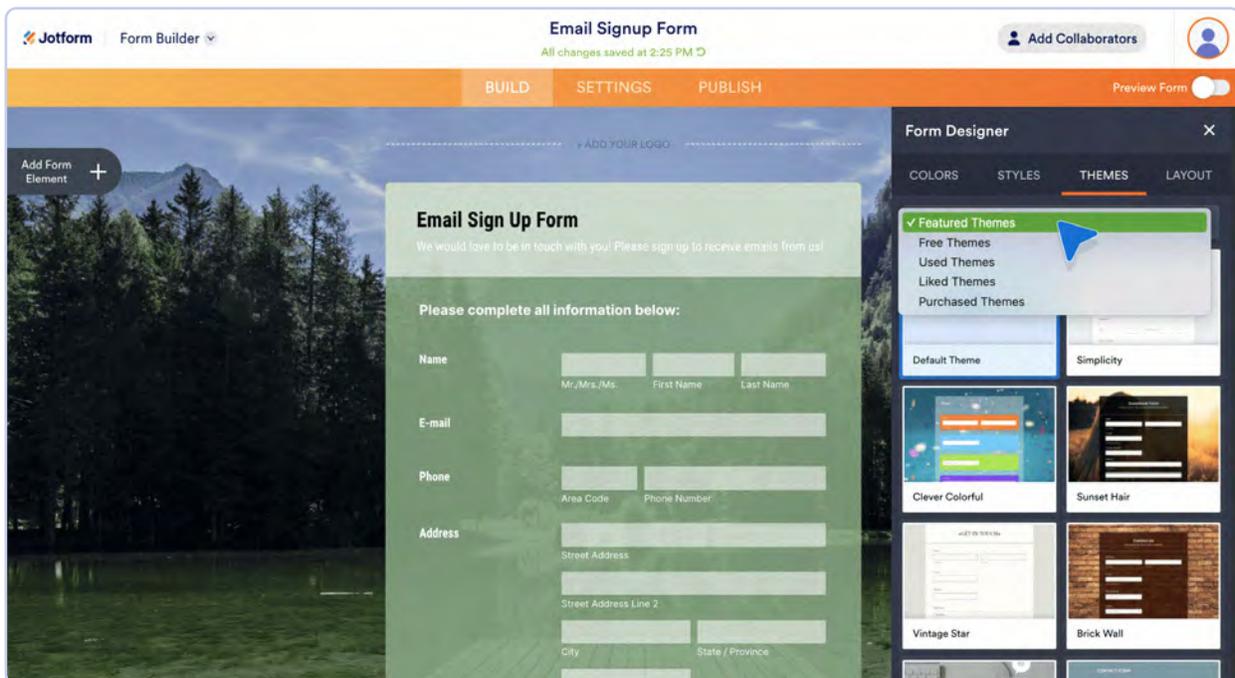
## Themes

At Jotform, we understand that you don't always have the time to personalize your form, but you still want it to look professional. That's why we have a library of preset themes for you to choose from.

In addition to a variety of free and paid themes, you have the option to save your favorite and previously used themes, so you can always come back to them. All you have to do to instantly personalize your form is click on the theme you want to use, and it will show up in the Form Builder.

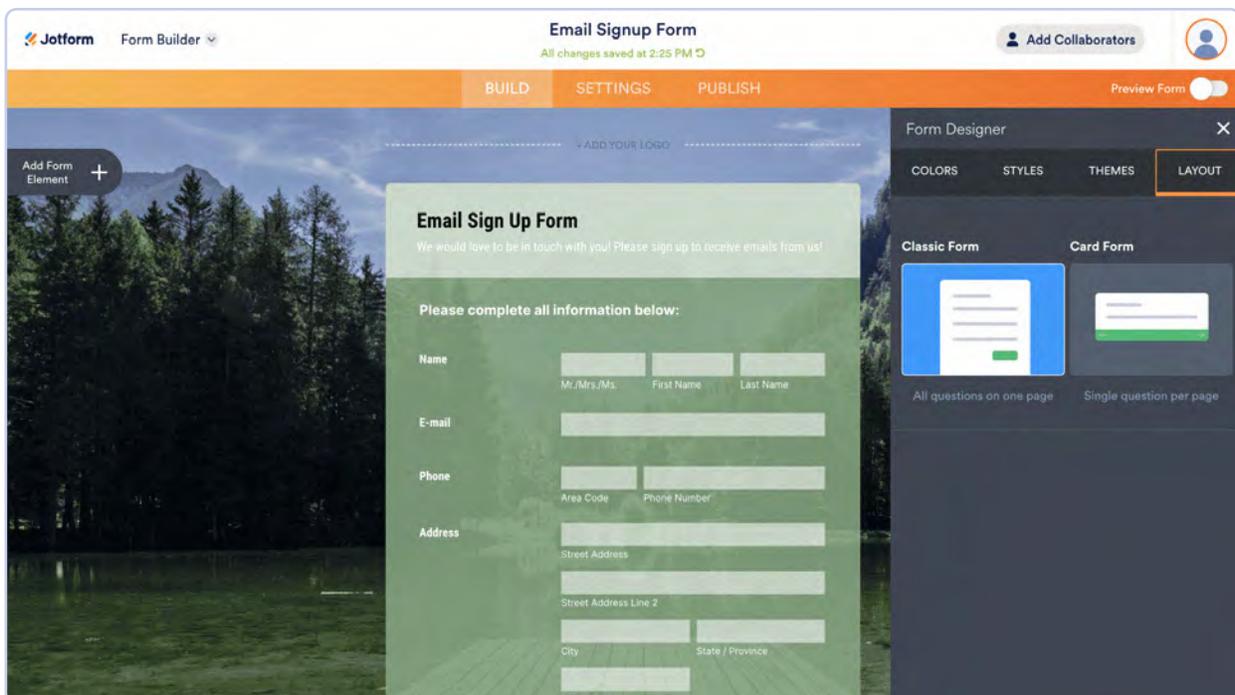


Featured themes are preloaded into the Form Designer.



## Layout

The **Layout** tab allows you to change the layout of your form. This is incredibly helpful when you're unsure which form layout is best. Feel free to switch between the Classic and Card layouts to see which one works for you.

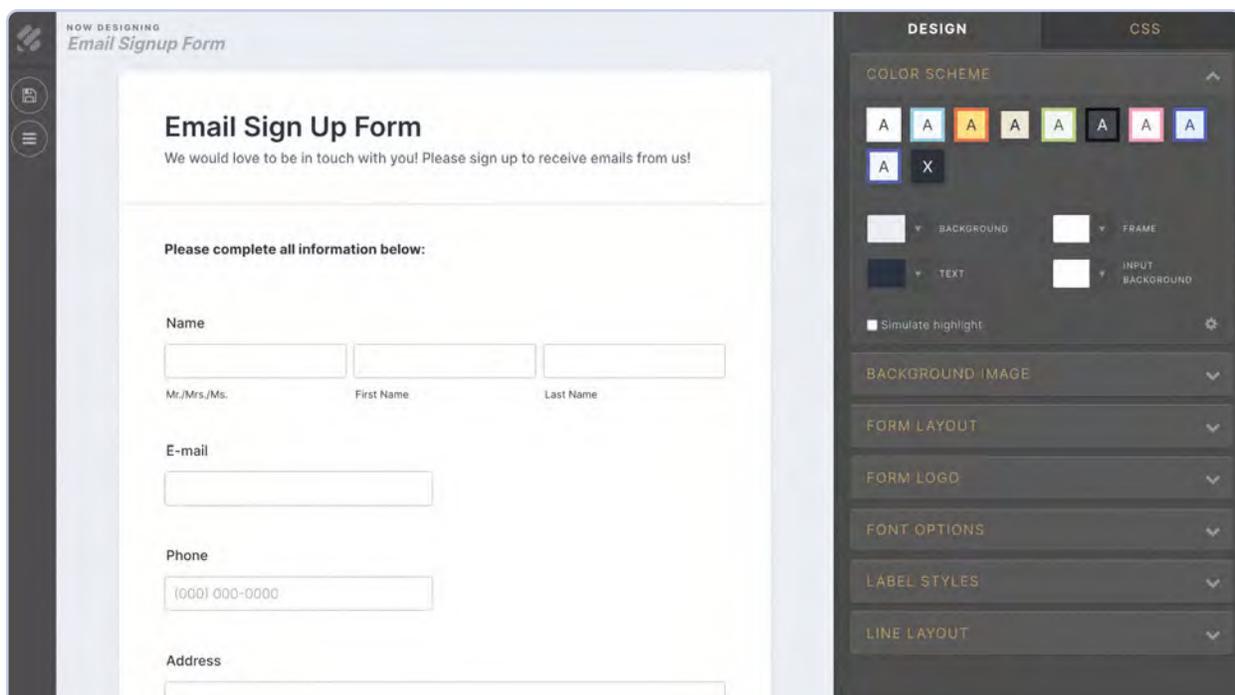


## Advanced Designer

In both the **Colors** and **Styles** tab is the **Advanced Designer** button. This tool allows you to customize your form down to the tiniest detail, including the way the lines look.

In the **Color Scheme** menu, you can customize your form's colors with a unique background, a frame, and text. In the **Form Layout** menu, you can customize the layout down to the corners. But please note that the Advanced Designer will only work with the Classic Form layout, not the Card layout.

The Advanced Designer also allows you to add a cover page, change the label styles, and change the line layout.



## Your first Thank You page

Now that you've figured out the basics of your first form, you're about ready to start sending it out. But there's one more piece — the cherry on top — you'll want to include to ensure a positive impression of your brand and help you strategically engage with your customers, patrons, or respondents.

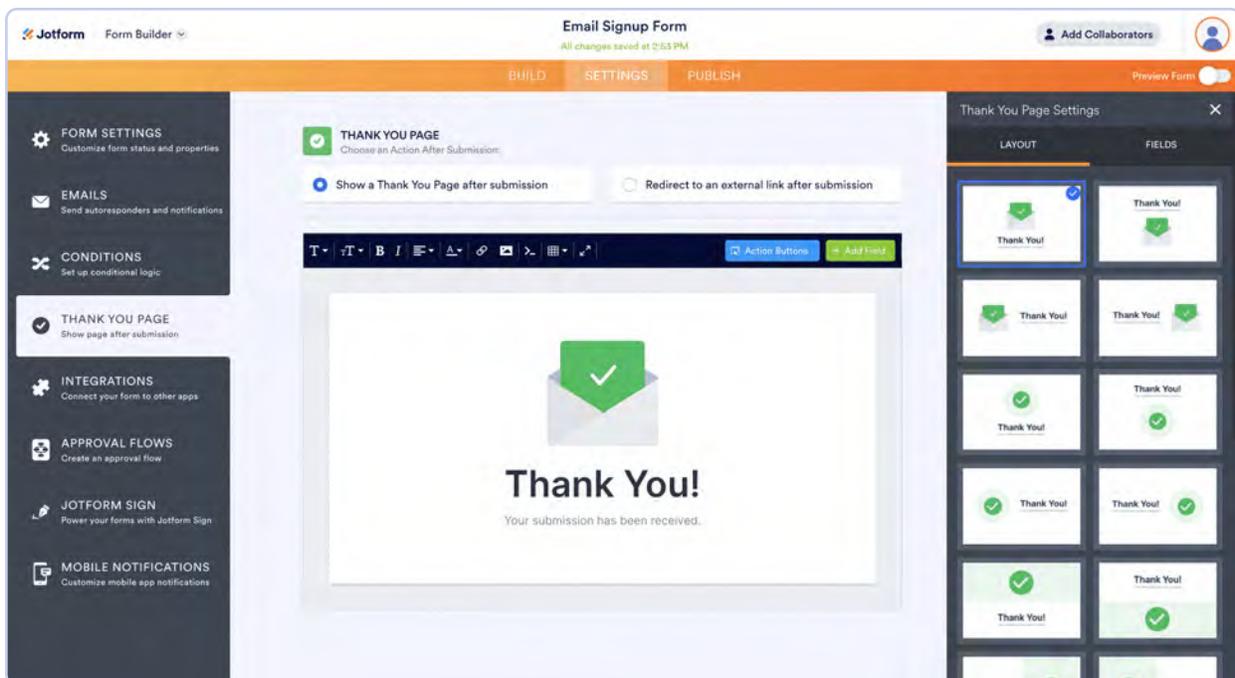
Your form's Thank You page is important for two big reasons:

1. It takes time to complete forms, so make sure your recipients know that you appreciate the time they've taken to give you the information you're asking for (especially if you want them to do it again in the future).
2. Including follow-up information in your Thank You page gives you another opportunity to build trust, get more information, and further engage your form users.

## Getting started

Ready to create a cool Thank You page that will have a great effect on your respondents? Of course you are!

To add a Thank You page to your form, access the **Settings** tab in the top menu and then click on the **Thank You Page** tab in the left menu.



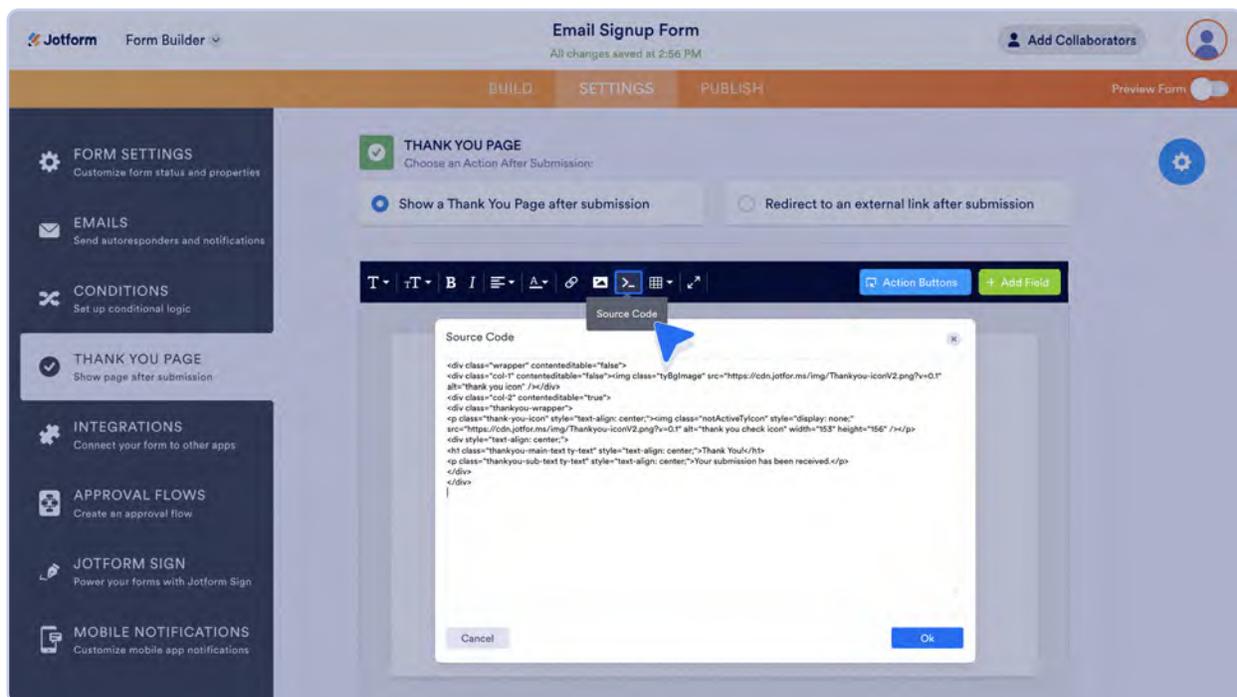
The first thing you'll need to decide is how to design your page. You can choose from 24 different layouts to find a design that matches your organization's aesthetic. You can also show any fields that appear in the form on the Thank You page, which might be helpful for the respondent's reference or in conjunction with an action you'd like them to take.

## Handy features for your first form

The Thank You Page tab offers toolbar features that enable you to further customize your Thank You page. (Please note that most of these features are available only for Classic forms.) For example, you can adjust the font, font size, and color of any text that appears on the page.

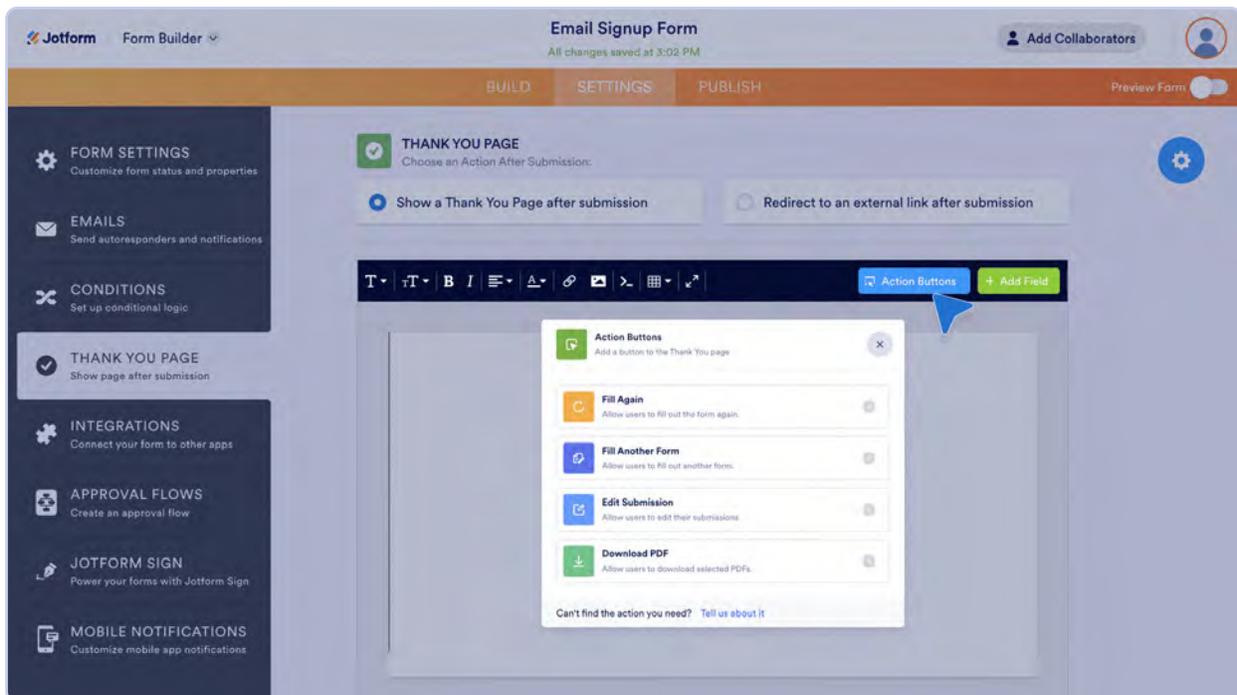
You can also add images to your page, whether it's your brand logo, pictures for relevant events, or lighthearted company photos. Along with the images, you can add links for any websites you'd like your respondents to visit once they've completed your form.

There are also options to add a Table element and source code to your Thank You page if you so desire. If you're hesitant to try your hand at coding HTML or have questions about formatting your Table, don't fret. The Jotform Enterprise Customer Success team is available to help you and your staff troubleshoot and build the perfect form to suit your needs.



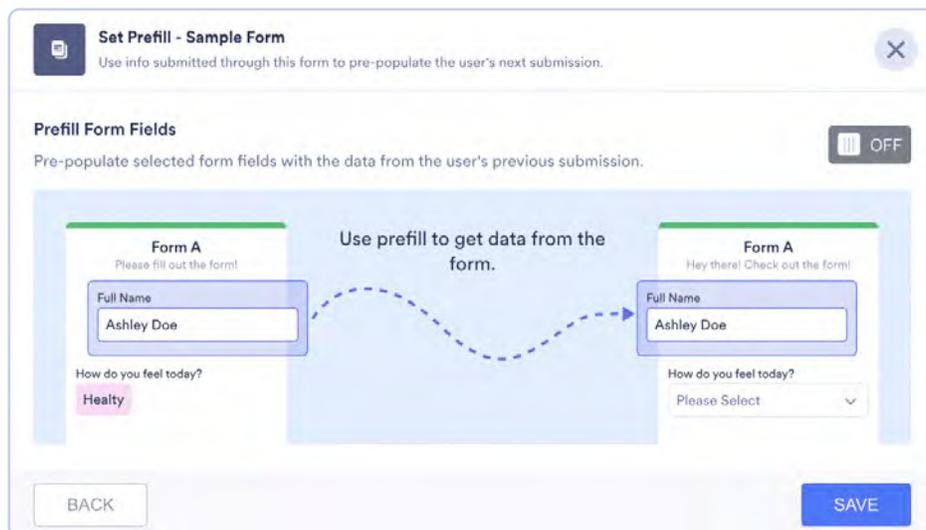
## Thank You page action buttons

Action buttons give you convenient options that can really improve your productivity. By adding an action button to your Thank You page, you'll make it easy for your respondents to follow up after their form submission.



Thank You page action buttons available in the Form Builder

Simply put, action buttons make it easy to engage with your customers, all within your form. For example, you can use the convenient **Fill Again** button in scenarios where a group of people need to fill out the same form multiple times.



Many Enterprise users save respondents time and effort by setting up prefill on forms that need to be filled out multiple times throughout a day. This can be handy for routine inspections, inventory, and field service reporting. Simply choose which form fields you'd like to pre-populate when your respondent fills out your form again, and you're good to go.

**Did you know?**

On average, about 400 Thank You pages with action buttons are created each day.

Another helpful button is **Fill Another Form**, which makes it easy for your respondents to send you a “chain” of related information, with one form submitted after the other. This is helpful when bringing on new hires, collecting health information, or anytime you require a good deal of information but don't want to overwhelm your form fillers. As an FYI, the Fill Another Form button can also be prefilled, provided the same fields exist in your subsequent forms.

Those are just two examples, and the additional action buttons (Edit Submission, Download PDF) provide valuable benefits as well.

The Thank You page is the icing on top of the great form you've so thoughtfully put together, so it's important to give it thought. Your Thank You page can be a key ingredient in your recipe for customer engagement success. It will provide your users with easy response options that allow you to capture more of the information you want.

Best of all? It doesn't take much time to set up a visually engaging page your users will love. Now get out there and say thank you!

## Online forms for all

It may seem like Jotform Enterprise offers a ton of options for building your online forms. And honestly, that's because it does. But perfecting your form is easy to do, even when using advanced features. That's important, because the best benefit of online forms is saving time.

Soon, you may find yourself creating online forms for everything — or nearly everything. The drag-and-drop experience in the Form Builder coupled with hundreds of widgets and integrations makes it incredibly adaptable to a range of needs and use cases. Tony Richman found it to be the perfect solution for ACS Stainless Steel Fixings, a family-owned business that had outgrown its paper-based processes.

“In about a month, we created 30 forms for finance, logistics, human resources, sales, project management, and our health and safety environment teams,” he said.

While receiving valuable data with online forms is easy to do, don't forget about the most important people in the process: those who fill out your forms. Jotform Enterprise provides an automated way to keep the lines of communication open after forms are completed. In addition to the Thank You page, form responders receive autoresponder emails. These emails act as a receipt that confirms their data has been securely collected, which can promote trust and transparency between you and your form fillers.

Providing this confirmation is a built-in feature. But there are ways to personalize these emails so they suit your needs. In the following chapter, we'll take a comprehensive look at how to do this.

## Chapter 5

# Emails

One of the best things you can do after someone submits your form is notify everyone involved. That includes you, your form respondent, and any teammates or collaborators you work with.

But why is a notification so important? After all, isn't the key thing that someone submits the form in the first place?

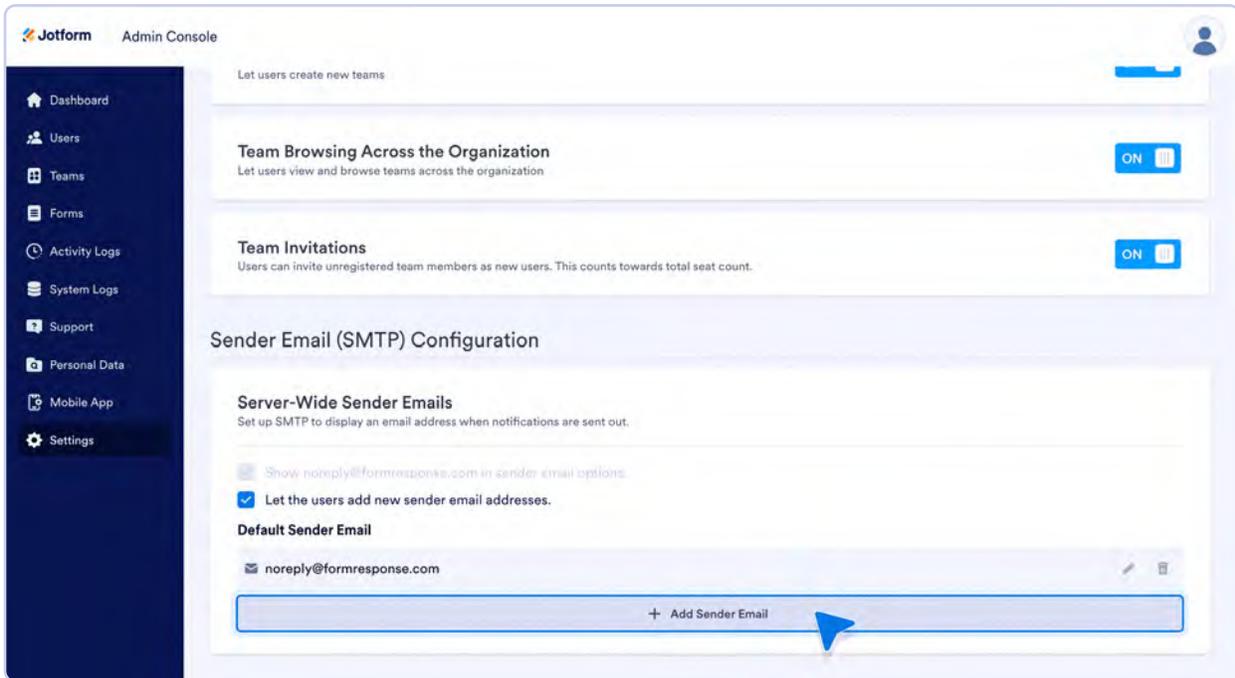
It's important for the same reason you get a receipt when you go to the ATM or a letter in the mail after opening an account — humans crave confirmation for any kind of transaction. And submitting a form involves one of the most sensitive transactions of all: sharing our data.

On a more functional level, keeping everyone in the know about your form's status ensures that those who need to take action can do so and that relevant parties who need to be alerted will be.

As a Jotform Enterprise customer, you're equipped with the flexibility to maximize our automated communication features. For instance, regardless of the type of email being sent, you can use a custom sender/from email address that, when combined with white-labeling capabilities, helps reinforce brand consistency in the eyes of your customers.

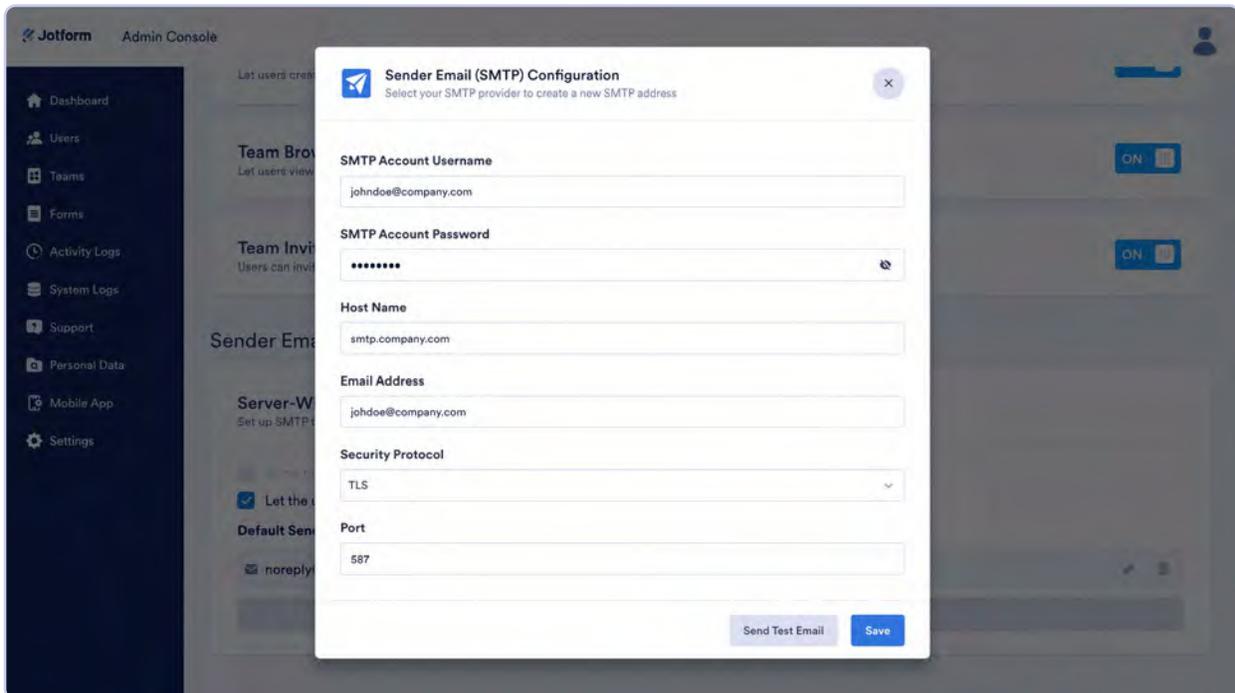
When you set up custom sender emails in Jotform Enterprise on a server-wide basis, you're ensuring alignment across the organization, freeing up individuals from having to worry about one more thing.

It's easy to set up your server-wide sender email address in the **Settings** tab of the Enterprise **Admin Console**, which is accessible to anyone with admin-level access to your Enterprise account.



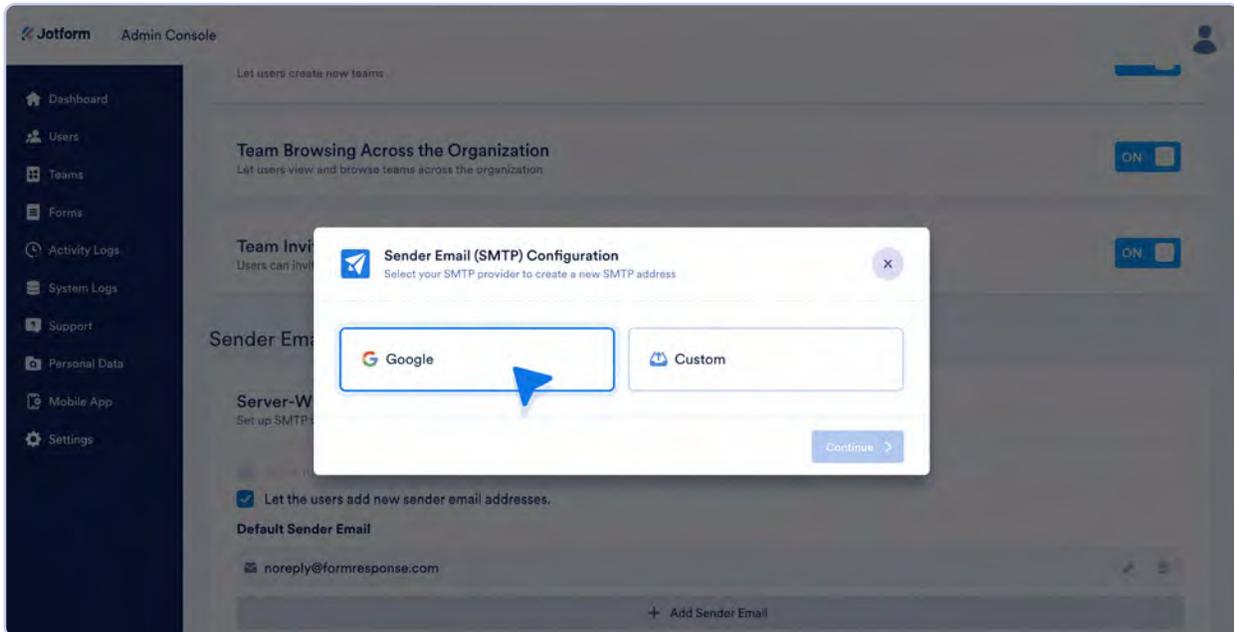
Just scroll to the bottom of the Settings page until you see the **Sender Email (SMTP) Configuration** section. Click **Add Sender Email**, and fill out the relevant credentials:

- Email Address
- Host Name
- Port
- Username
- Password
- Security Protocol

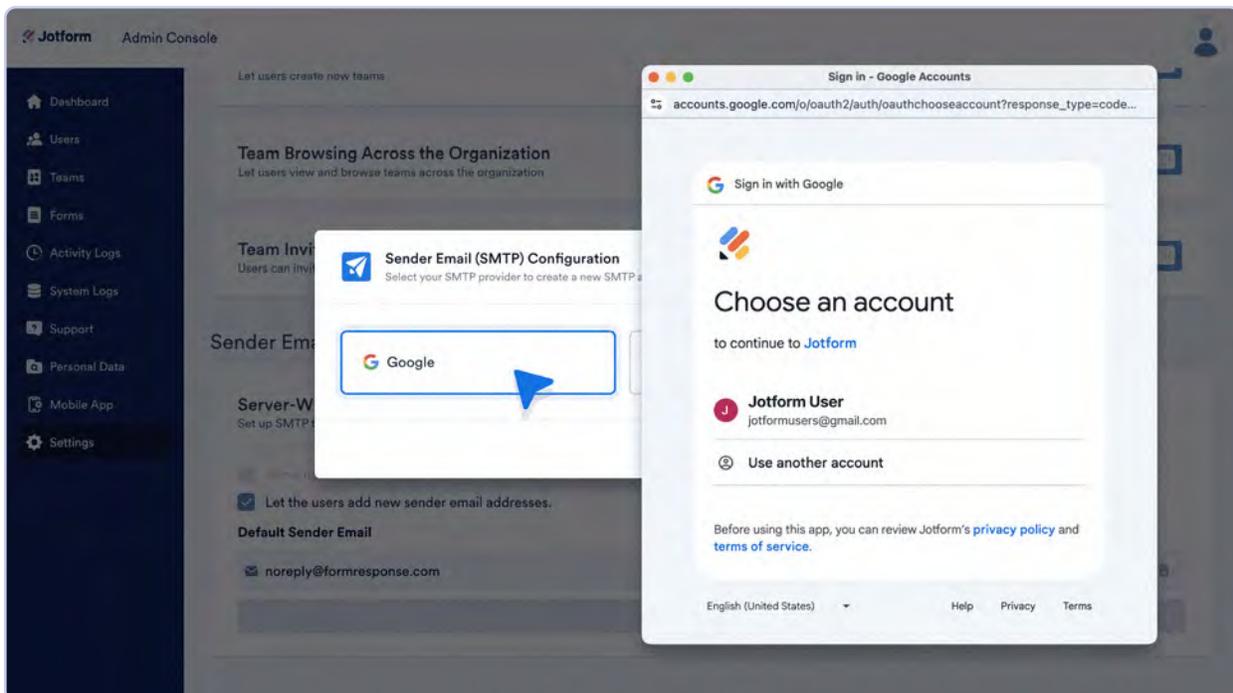


Try a test email first, and if it works, click the **Save** button to add your custom sender email address to all of the automated emails sent via Jotform.

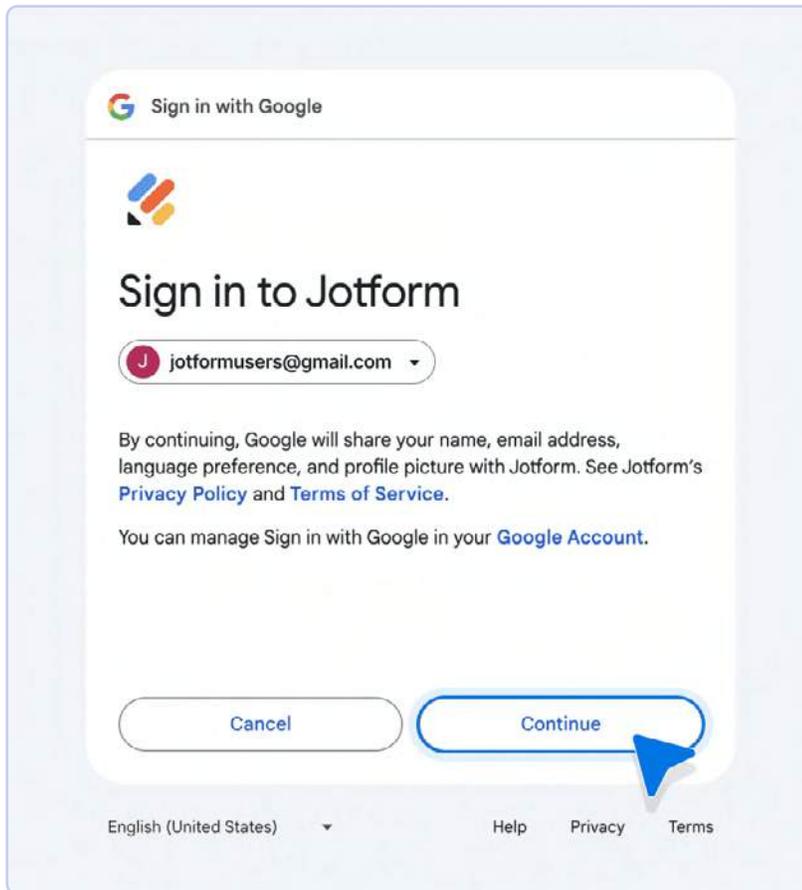
If you're connecting with a Google account, the process is a bit more streamlined. After clicking the Add Sender Email button, just click **Google**.



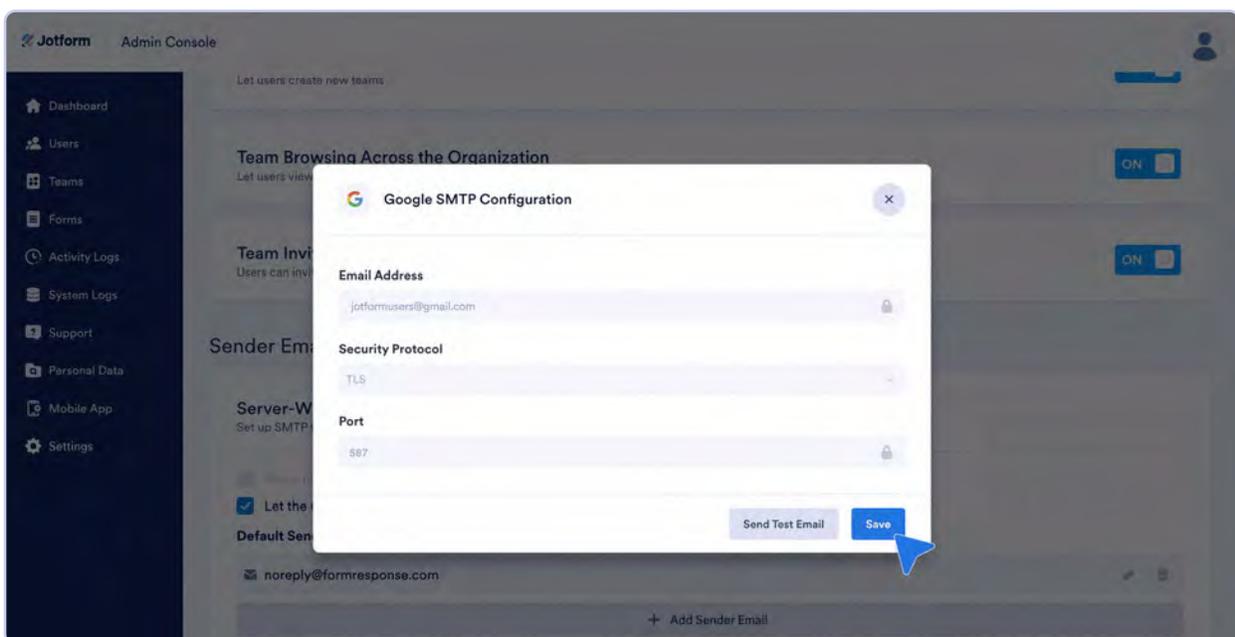
Then select the account you want to use.



Click **Continue** to sign in with your Google account.



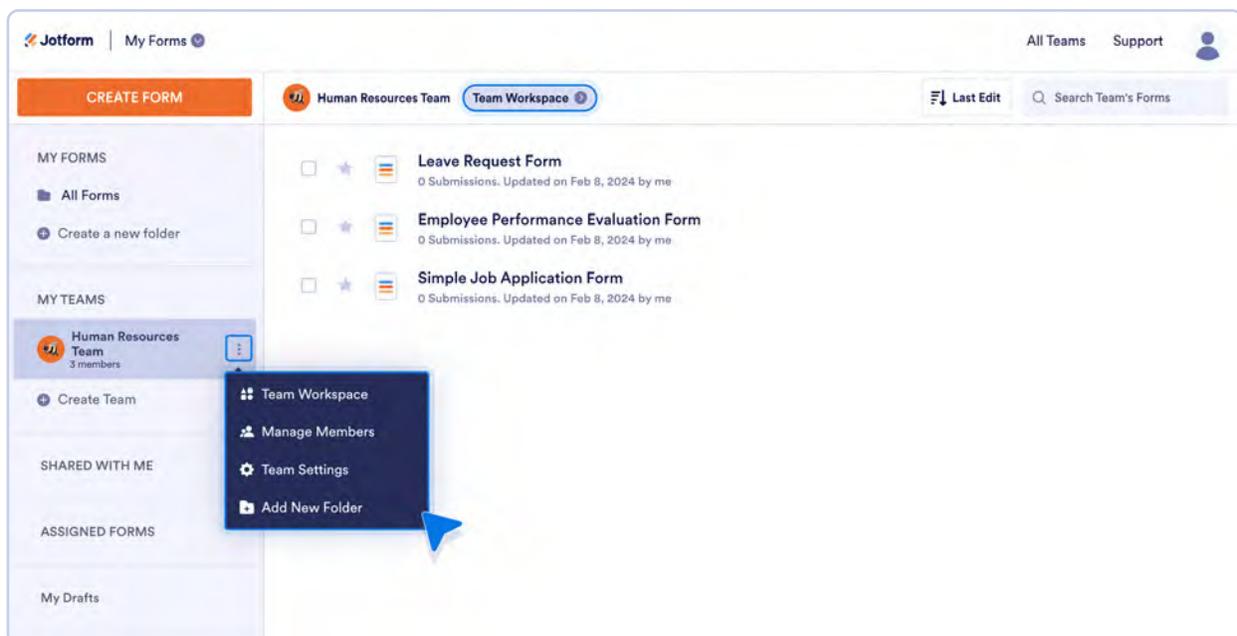
Your security protocol and port will already be configured, so all you have to do is click **Send Test Email** and Save.



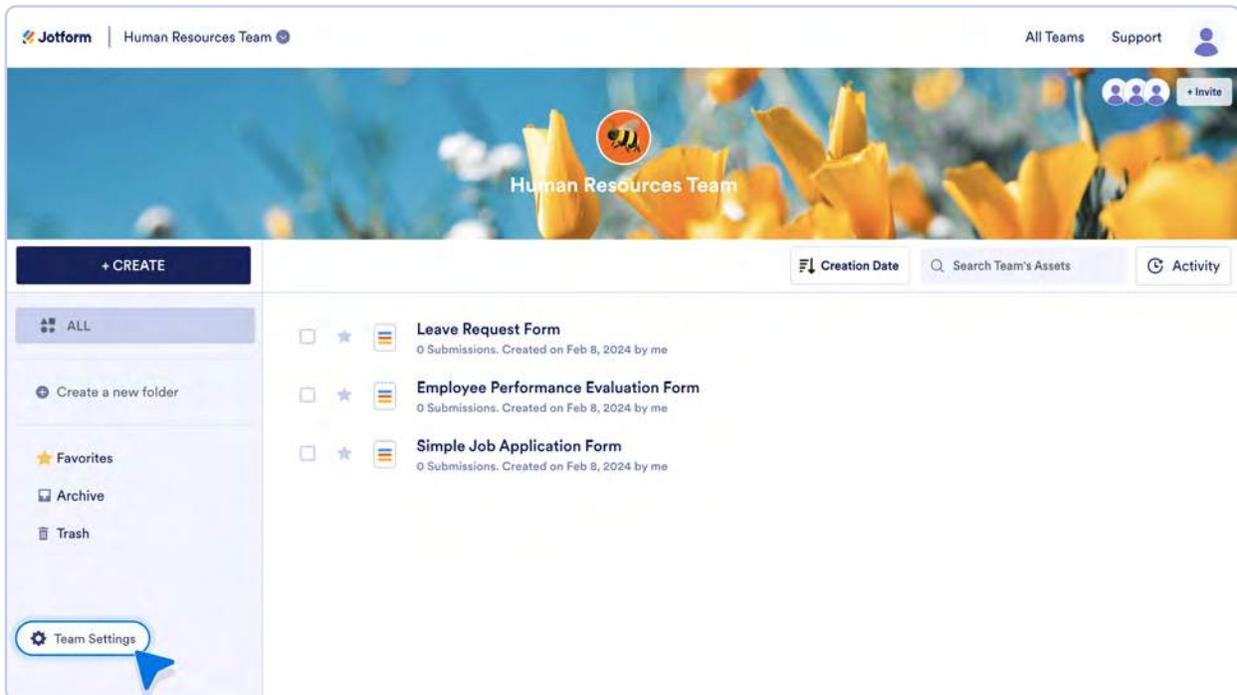
There are other cool options you can take advantage of, like setting the no-reply email of your choice and letting your users add new sender email addresses of their own. Features like this let you customize your Enterprise instance of Jotform in almost any way you need.

Similarly, team (and Enterprise) admins can add sender emails for team members to use with their shared workspace. To do this, first select the Team you'd like to have a new sender email.

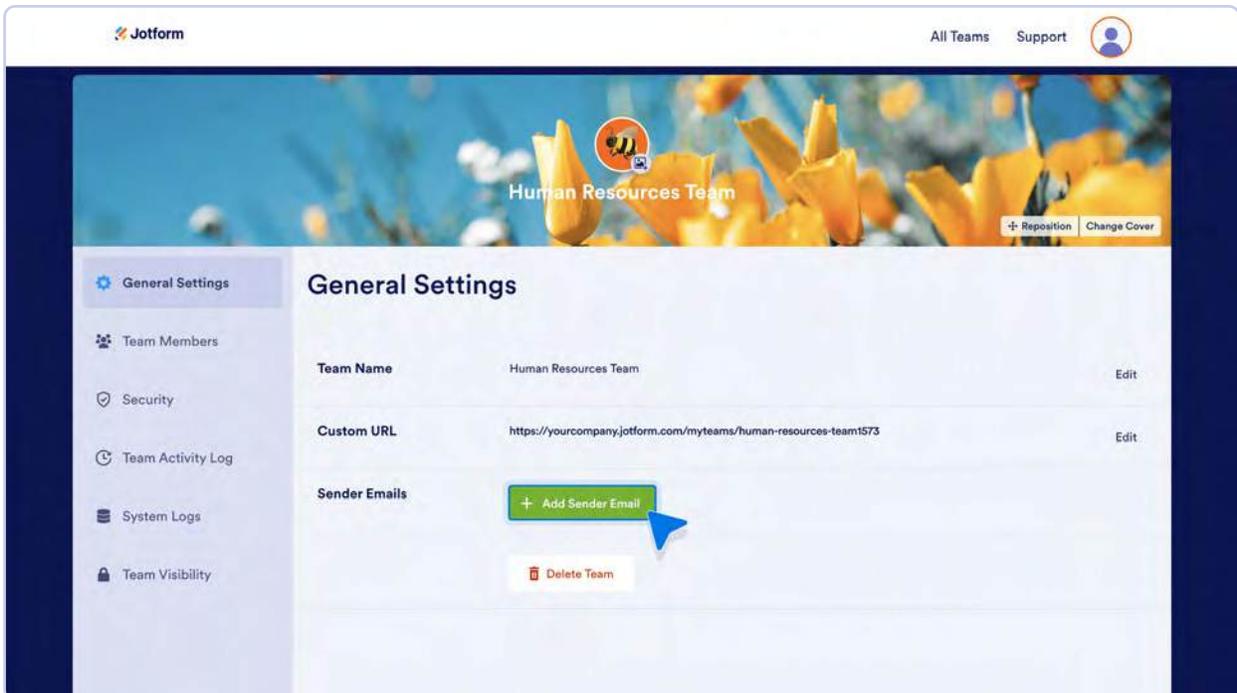
Teams you belong to are listed on the left of the Jotform home screen. To view every team in your organization, click the **All Teams** button in the top right corner. Clicking on the hamburger menu next to a team in **My Teams** or hovering over a team in the All Teams listing in the Admin Console will let you navigate directly to that team's workspace.



From the Team Workspace, click on **Team Settings** in the bottom left corner.



Then click Add Sender Email and follow the prompts as outlined above.



There are three kinds of automated emails you can set up to notify stakeholders about your form status: autoresponders, notifications, and reminders. In this chapter, we'll discuss these emails and how you can use them to your advantage to make your workflow as smooth as possible.

**Did you know?**

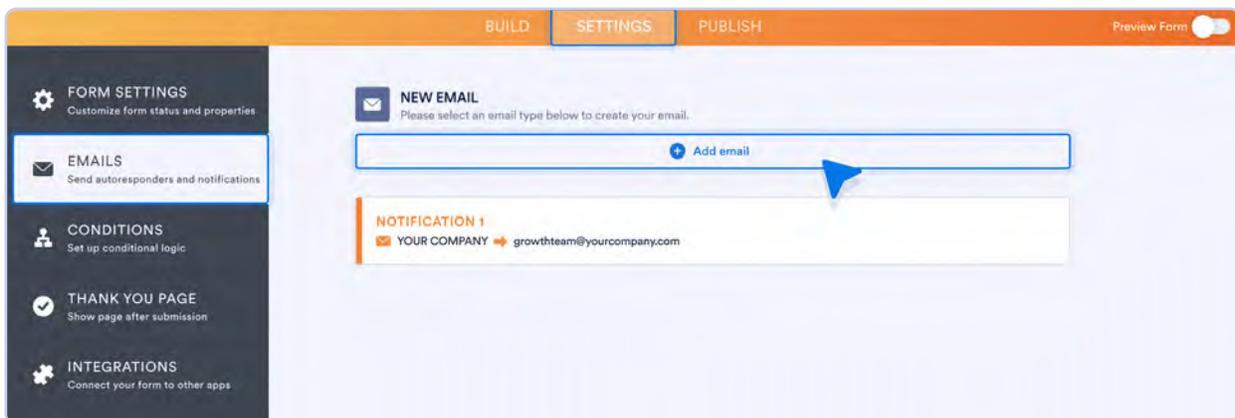
On average, 1.5 million notification emails and 84,000 autoresponder emails are sent through Jotform on a daily basis?!

## Autoresponders

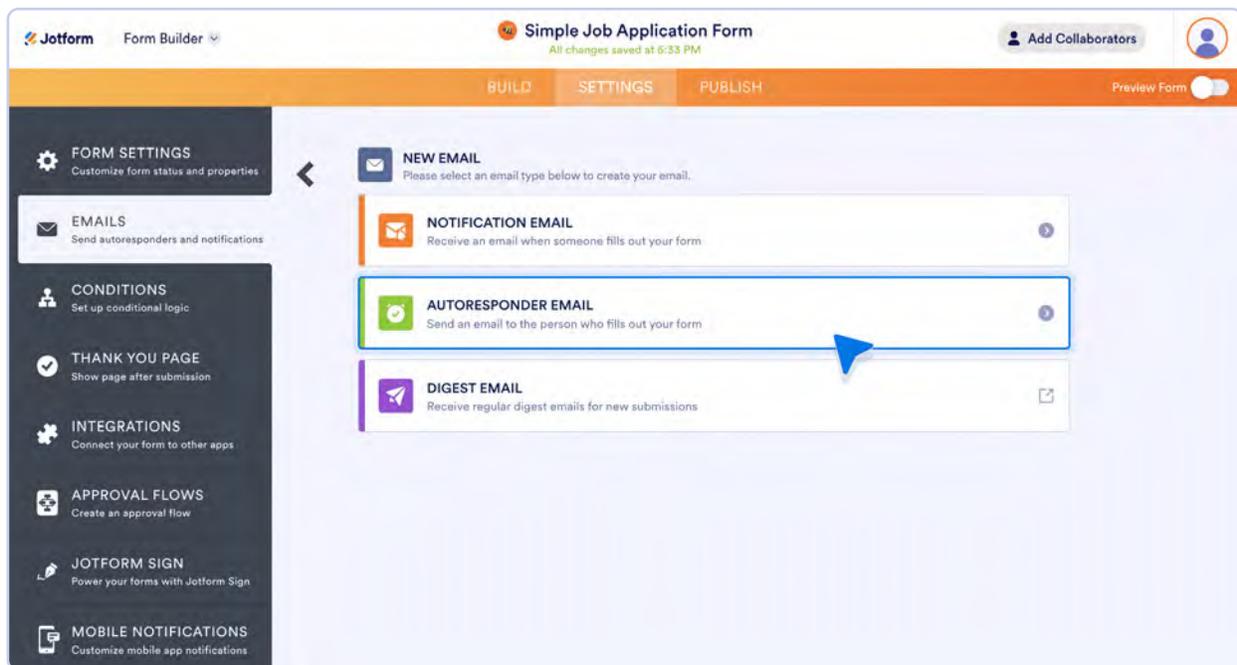
Autoresponders are pretty much required for form submissions, except where data privacy laws restrict their use. They're also a sneaky good way to boost your productivity.

Whether you want a quick prewritten acknowledgment and reply, a means for respondents to get a copy of the data they submitted, or to prompt the submission of additional information, autoresponders are great at keeping your respondents (whether internal or external) engaged through their inbox.

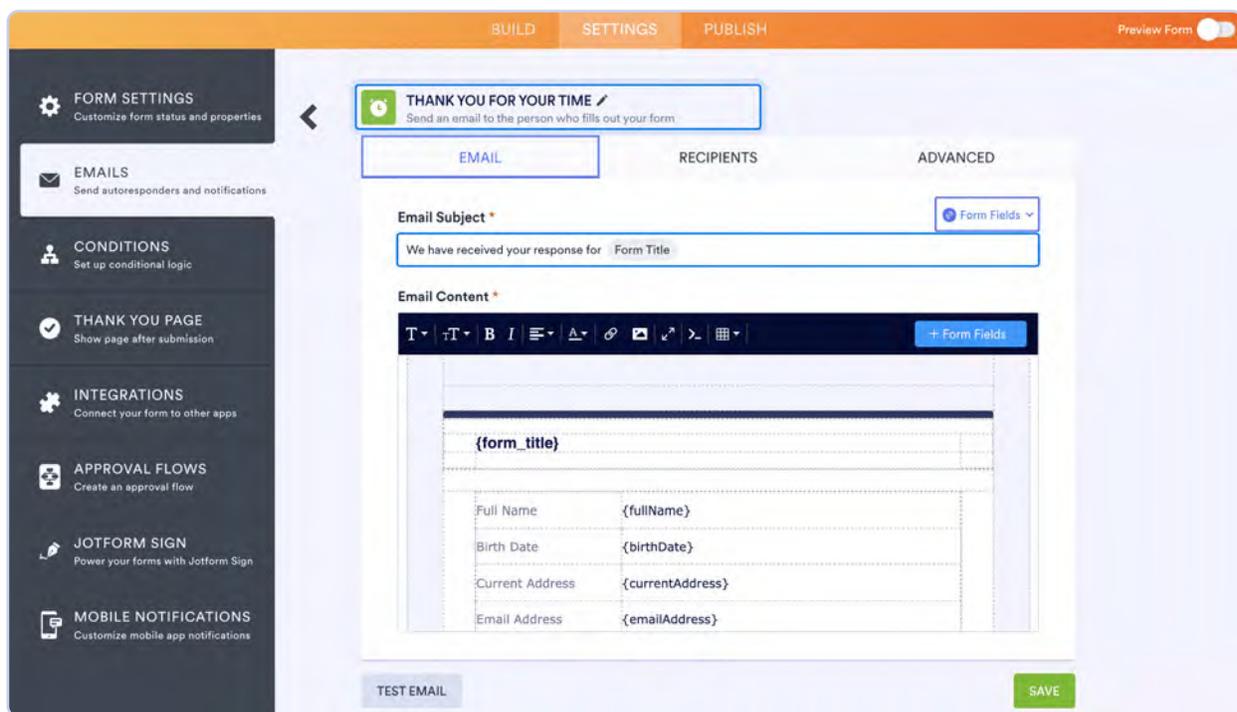
Let's get started by viewing the email template and adding recipients to your autoresponder. To access the autoresponder, click Settings at the top of the Form Builder. Next, click **Emails** in the left panel followed by the **Add email** button.



A new **Autoresponder Email** button will appear for your users.



Upon clicking the Autoresponder Email button, you'll see the email template, the first of three available tabs. Here, you can customize multiple features to suit your organization's needs, including the email name, subject line, and content of your response. In the example below, I changed the title of my email to "Thank you for your time" by clicking on the edit icon next to the name.

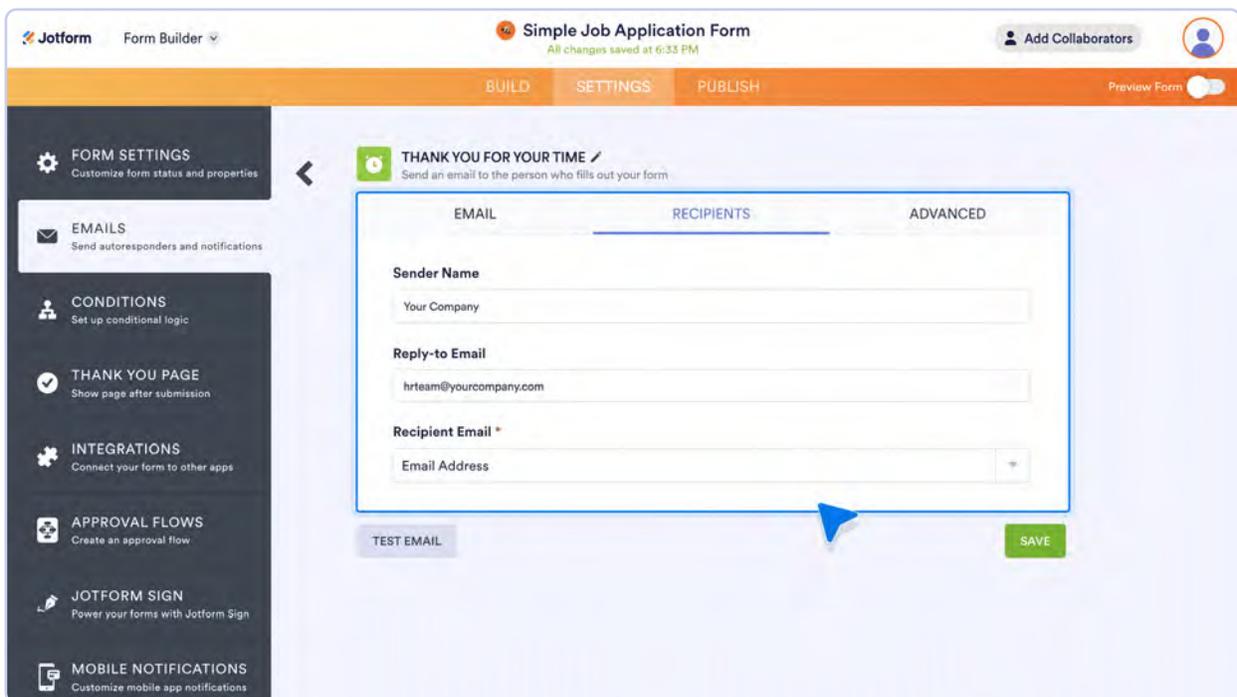


You can change your subject line to give your respondents a relevant greeting. Just edit it directly. Another option you have is to add the respondent's input for a specific form field (Full Name, for instance) to your subject line. Click on the **Form Fields** button to open a dropdown list of options.

Much like the Thank You page we reviewed last chapter, you can adjust the body of your email to use consistent content, style, format, branding, and form field inclusion. If you're just starting out, don't worry; the default layout for your autoresponder will include all the fields you have in your form (unless they are hidden fields or your location's privacy laws don't permit the inclusion of submission data by default).

## Adding recipients

The **Recipients** tab lets you control the **Sender Name** (i.e., your brand name or your personal name or nickname), the all important **Reply-to Email** address (though if you've set up a sender email via SMTP, your reply-to email address will reflect this), and the email address(es) of the intended recipient(s) of your auto response.



The screenshot displays the Jotform Form Builder interface for configuring an email. The top navigation bar includes 'Jotform', 'Form Builder', and 'Simple Job Application Form' with a status 'All changes saved at 6:33 PM'. The main menu on the left lists various settings: FORM SETTINGS, EMAILS, CONDITIONS, THANK YOU PAGE, INTEGRATIONS, APPROVAL FLOWS, JOTFORM SIGN, and MOBILE NOTIFICATIONS. The central panel is titled 'THANK YOU FOR YOUR TIME' and has three tabs: 'EMAIL', 'RECIPIENTS' (which is active), and 'ADVANCED'. The 'RECIPIENTS' tab contains three input fields: 'Sender Name' (with 'Your Company' entered), 'Reply-to Email' (with 'hrteam@yourcompany.com' entered), and 'Recipient Email \*' (with 'Email Address' entered). Below these fields are 'TEST EMAIL' and 'SAVE' buttons. A blue arrow points to the 'Recipient Email' field.

For the reply-to email, keep in mind that you may want to include your address or that of any relevant stakeholders, just in case the form submitter replies to the autoresponder email.

## Advanced tab

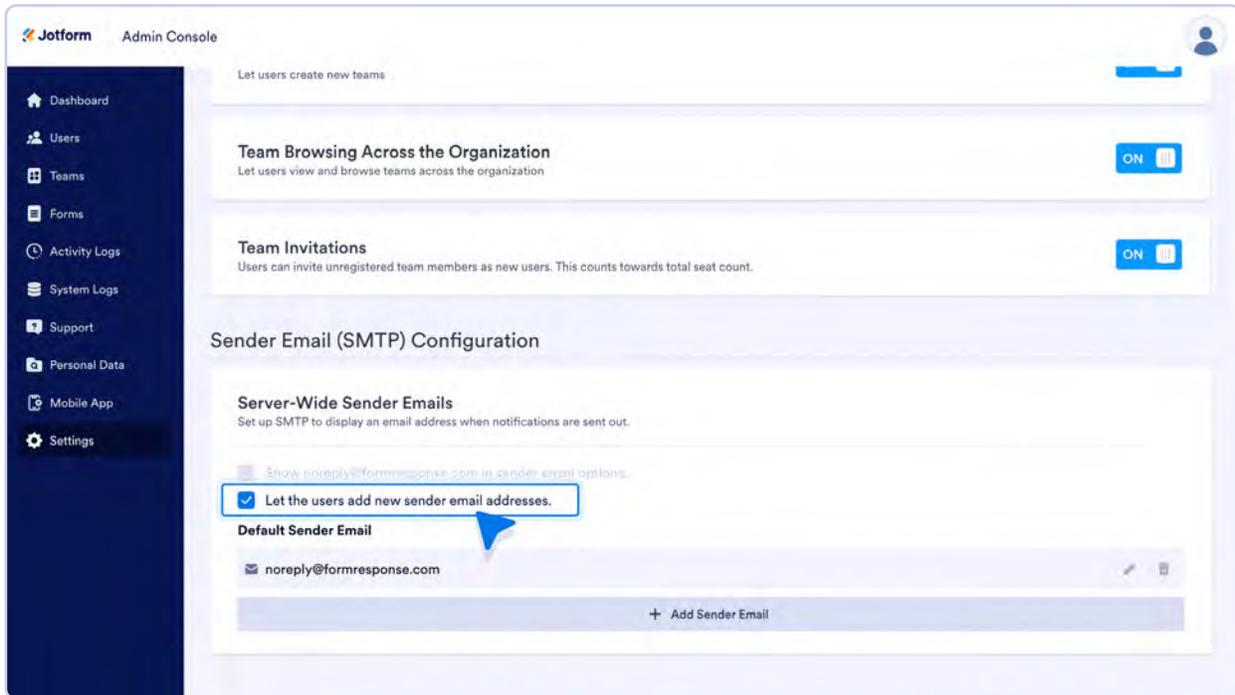
In the **Advanced tab**, you can really have fun customizing your autoresponder to fit your organization's needs.

The screenshot shows the 'Advanced' tab of an email configuration interface. At the top, there's a green icon and the text 'THANK YOU FOR YOUR TIME' with a checkmark. Below it, a subtitle reads 'Send an email to the person who fills out your form'. There are three tabs: 'EMAIL', 'RECIPIENTS', and 'ADVANCED' (which is highlighted with a blue border). The main content area is divided into several sections:

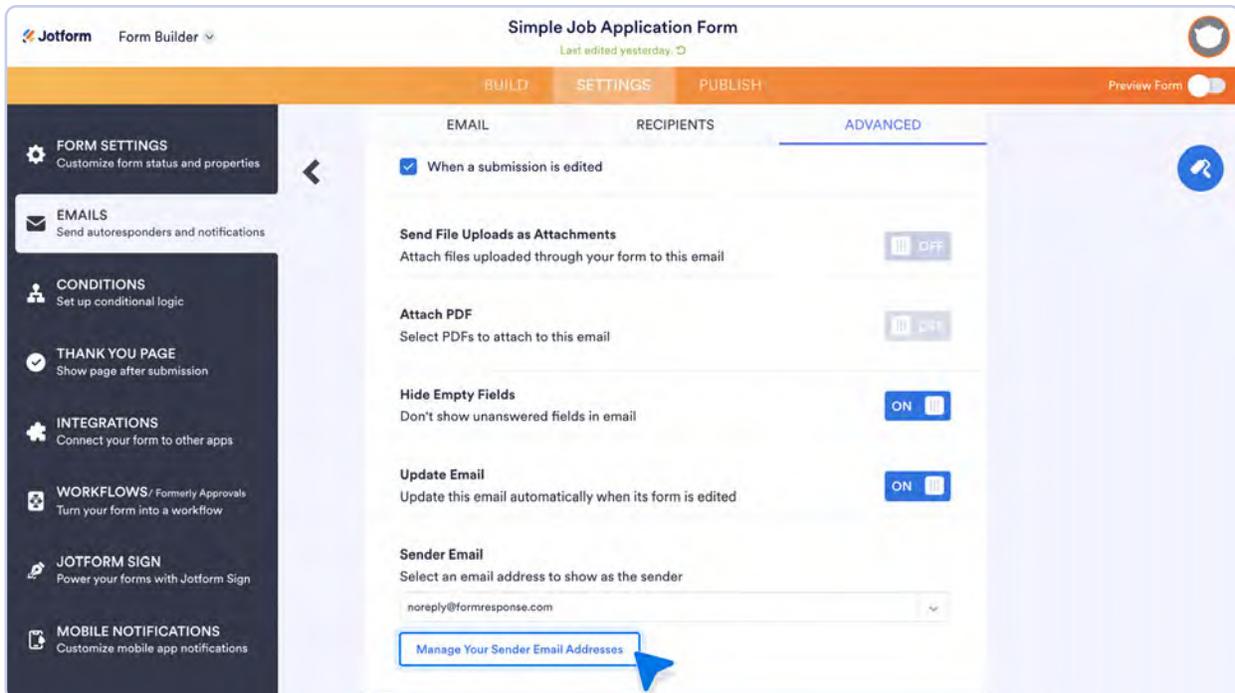
- Send Email When:** A section with the subtitle 'Users can get a new email every time the form submission is edited.' It contains two checkboxes: 'Send when a submission is received' (checked) and 'Send when a submission is edited' (unchecked).
- Attach PDF:** A section with the subtitle 'Select PDFs to attach to this email' and an 'OFF' toggle button.
- Attach File:** A section with the subtitle 'Attach a file to this email'. It features a dashed box for file upload, an 'Upload File' button, and the text 'or drag and drop here'.
- Send Email Later:** A section with the subtitle 'Choose to send this email instantly upon submission, or at a later date'. It has a dropdown menu currently set to 'Right away'.
- Hide Empty Fields:** A section with the subtitle 'Don't show unanswered fields in email' and an 'ON' toggle button.
- Update Email:** A section with the subtitle 'Update this email automatically when its form is edited' and an 'ON' toggle button.
- Sender Email:** A section with the subtitle 'Select an email address to show as the sender'. It has a dropdown menu showing 'yourcompany@yourcompany.com'.

At the bottom of the form, there are two buttons: 'TEST EMAIL' on the left and 'SAVE' on the right.

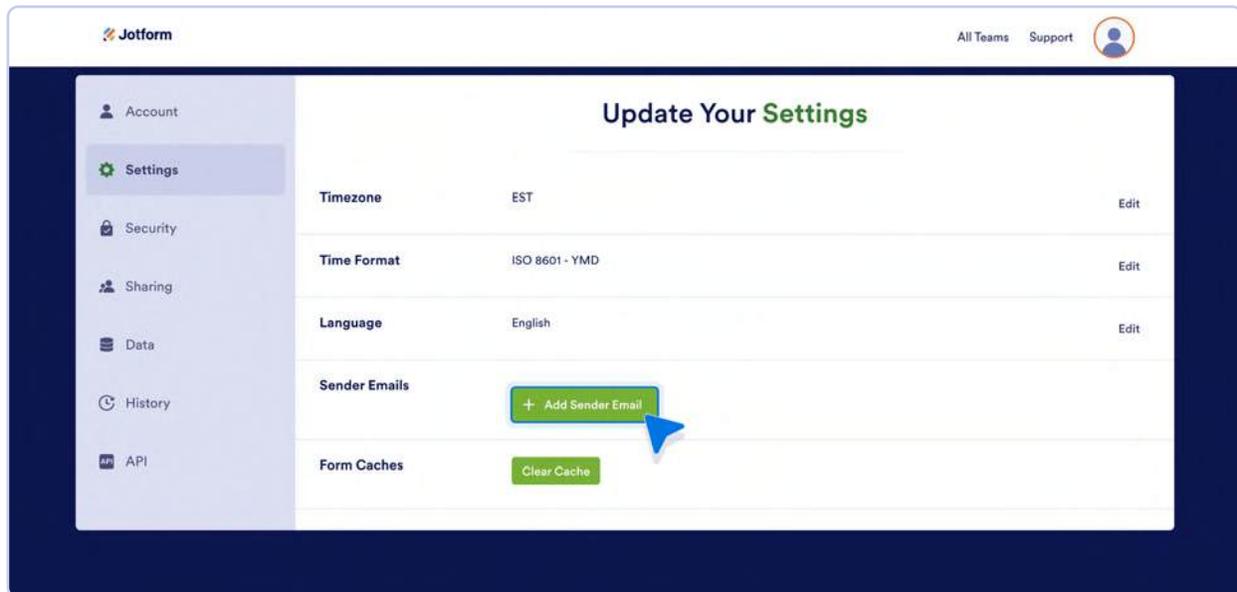
Within this dashboard, you have handy options like attaching a file to your autoresponder email (as in cases where you may want to give recipients company information or brand assets). Other options include sending form fillers a new email whenever their submission is edited, delaying the email or sending it on a specific date, and hiding empty fields.



Harking back to our SMTP discussion, if you have checked the **Let the users add new sender email addresses** box in the Admin Console, they can elect to do so here in the Advanced tab. Under the Sender Email heading in the Advanced tab, click **Manage Your Sender Email Addresses**.



Clicking that button will take you to the Settings tab in the Admin Console. Click the Add Sender Email button and configure your SMTP settings just like you did earlier.



If you haven't enabled users to add a new sender email address, non-admin users will see either the default no-reply email or the sender email address you specified.

Finally, if you'd like to see how your autoresponder looks, you can test your form autoresponder email by clicking the **Test Email** button.

### A note about protected health information (PHI)

Healthcare-related organizations must ensure their communications comply with HIPAA. Jotform has many features to help you do just that.

If you have enabled HIPAA-compliance features on your account, you can use autoresponder emails, but you can't include sensitive healthcare data in them. Instead, you'll need to mark your form fields as PHI (protected).

When you get a new submission that needs to be delivered via email, protected fields will be removed from the email and the email will include only fields marked as "not protected."

The screenshot shows a Jotform submission interface. At the top is the Jotform logo. Below it is a form titled "Form". The form contains several fields:

- Name: Hidden to protect your privacy
- Email: Hidden to protect your privacy
- Phone Number: Hidden to protect your privacy
- Age: 21
- Interest: Three buttons labeled "Lifestyle", "Health", and "Sports".
- Are you taking any medications?: Hidden to protect your privacy
- Do you have any major health conditions?: Hidden to protect your privacy

## Notifications

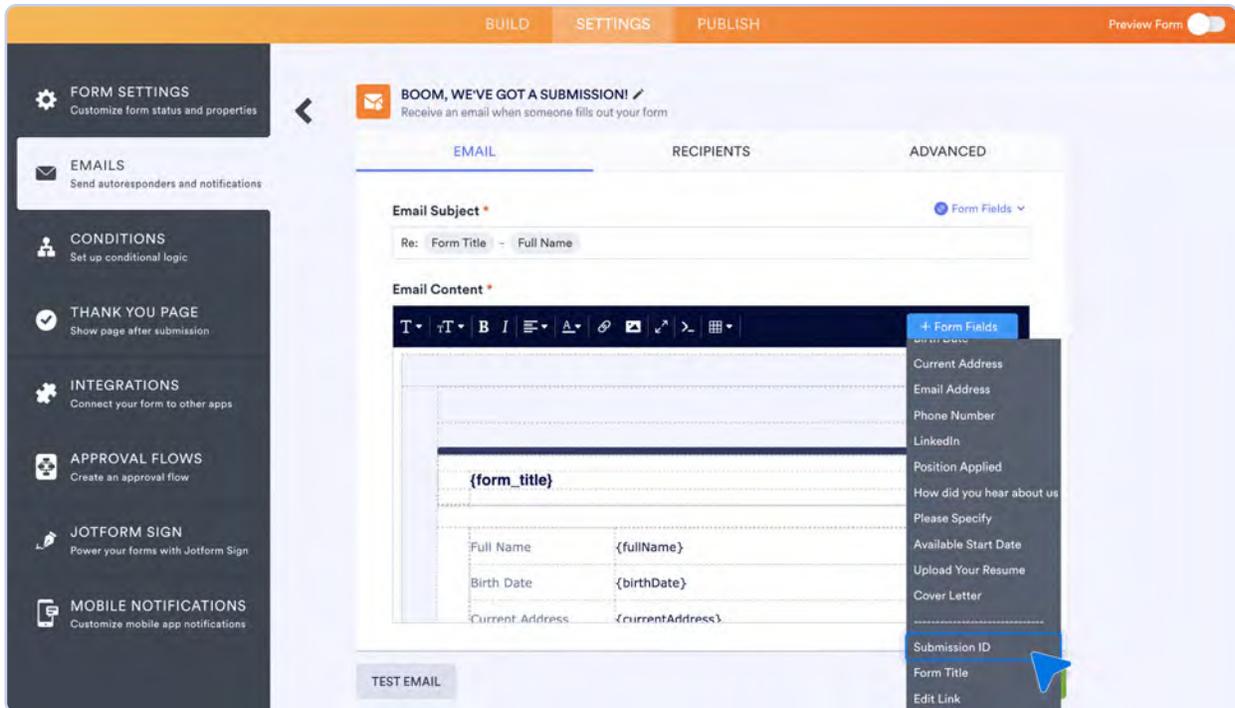
While autoresponders go to form submitters, notifications are for you, your team, and any other stakeholders you'd like to be alerted when a form is submitted. Plus, you can format notifications so that any information that will help streamline (and speed up) your workflow — including a summary of your form submissions and submission data — will be delivered directly to your inbox.

The screenshot shows the Jotform Form Builder interface for a "Simple Job Application Form". The top navigation bar includes "BUILD", "SETTINGS", and "PUBLISH" tabs. A sidebar on the left contains various settings categories: FORM SETTINGS, EMAILS, CONDITIONS, THANK YOU PAGE, INTEGRATIONS, APPROVAL FLOWS, JOTFORM SIGN, and MOBILE NOTIFICATIONS. The main content area is titled "NEW EMAIL" and prompts the user to "Please select an email type below to create your email." Three email types are listed:

- NOTIFICATION EMAIL**: Receive an email when someone fills out your form. A blue arrow points to this option.
- AUTORESPONDER EMAIL**: Send an email to the person who fills out your form.
- DIGEST EMAIL**: Receive regular digest emails for new submissions.

The **Notification Email** option appears on the same page as the Autoresponder option in the Emails section of the Settings area. Upon clicking the Notification Email button, you'll see the same three tabs (Email, Recipients, Advanced) to set up your notification emails.

Similar to the autoresponder, you can tailor the content included in the subject line and body of the email to fit your and your stakeholders' needs. For example, if it helps to see more or less information associated with certain fields, such as a submission ID or the respondent's IP address, you can add or remove the necessary fields.



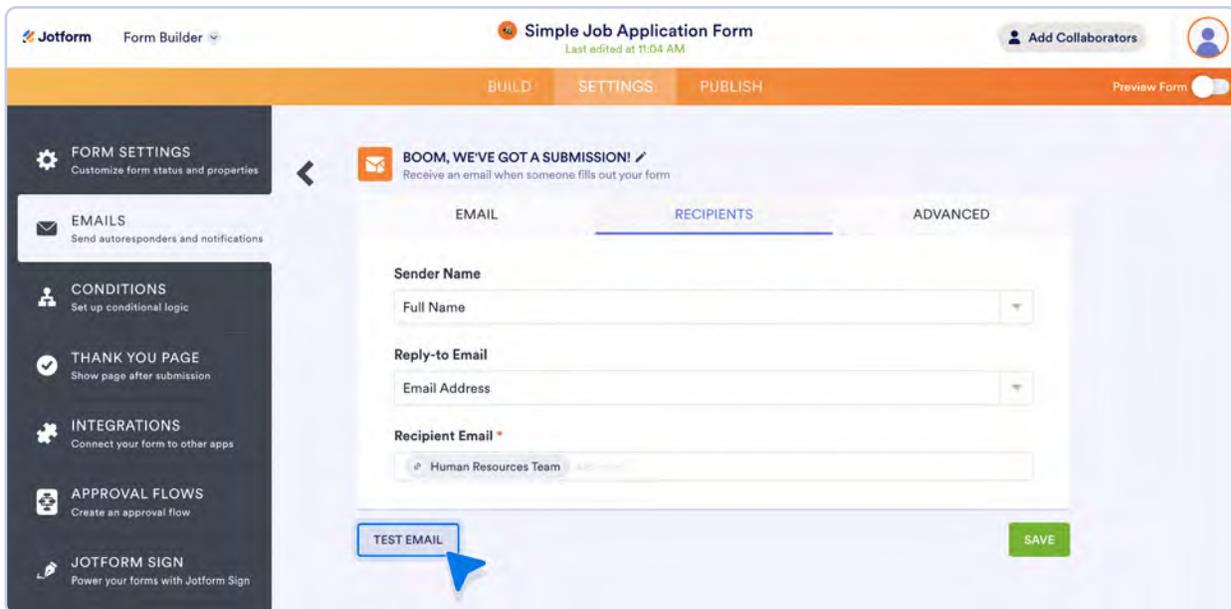
The Recipients tab allows you to designate the email addresses that should receive notifications when a new form submission comes in.



Feel free to add anyone you need to the recipient email list. Your Enterprise account allows you to include an unlimited number of addresses, which is very handy in situations where a team or an entire department needs to be notified.

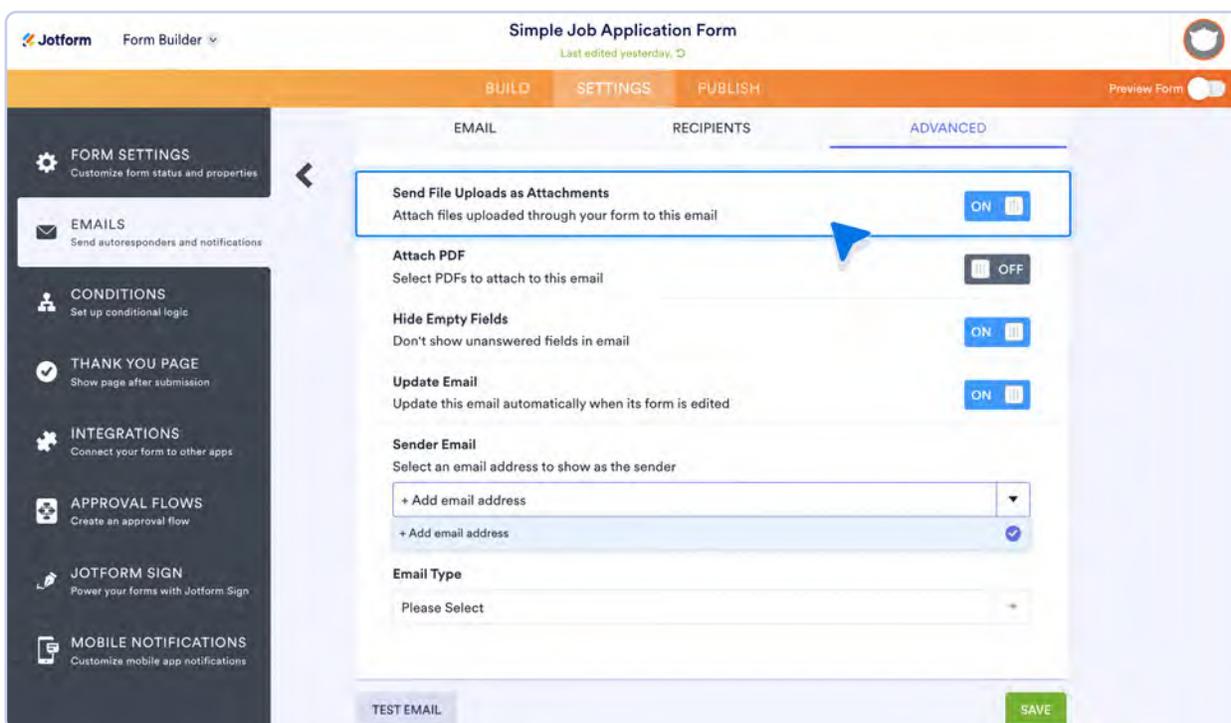
You can also change the sender name for practical or creative reasons.

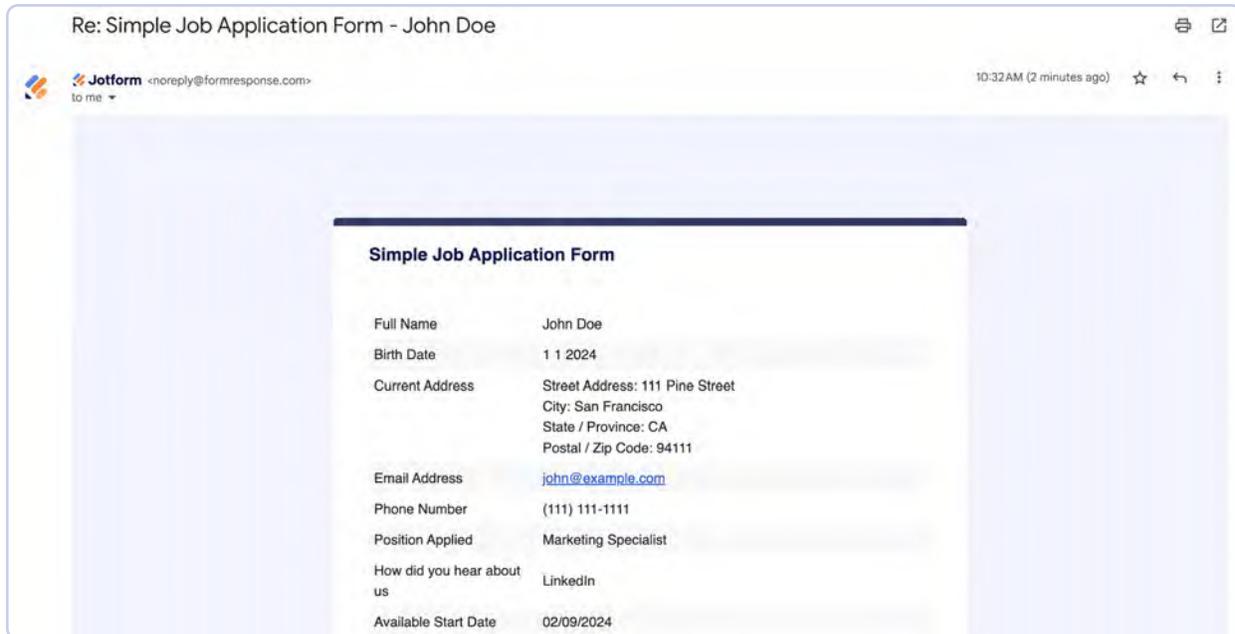
As with the autoresponder, the ever present Test Email button is located on the bottom left.



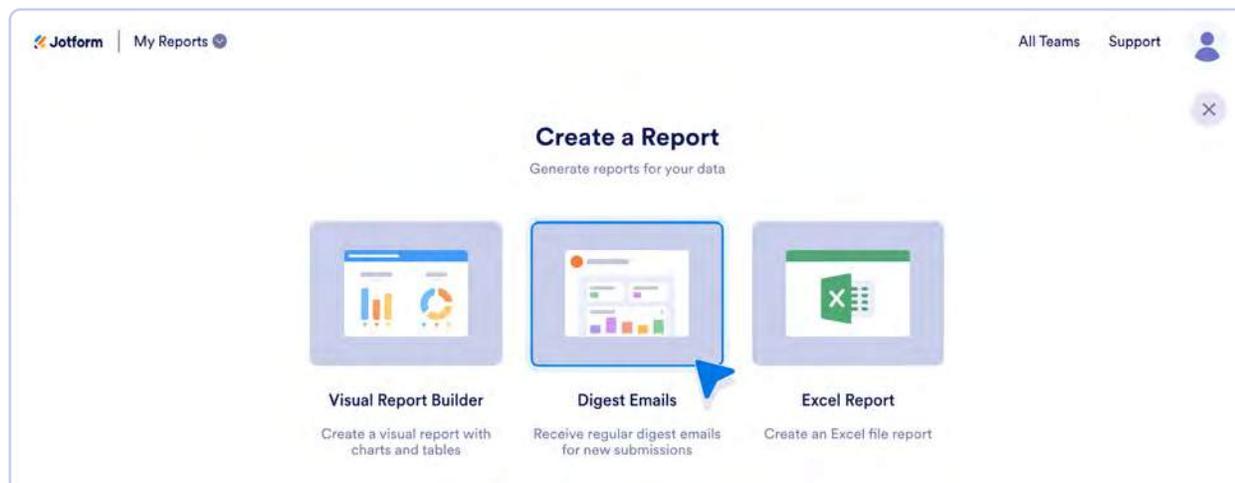
A word about sending test emails for notifications (which applies to autoresponders as well): If you're trying to test a new email recipient address using the Test Email button, be aware that the address the email goes to will default to the email address that's registered with your Jotform account. To test the newly added recipient email address, you'll need to create an actual submission on your live form.

Among other options, the Advanced tab allows you to use your email address as the sender email; thus, sending it through your specified server (like the SMTP we mentioned earlier) as opposed to Jotform's. You can also send submission uploads as attachments, which will appear in your notification email. Need to hide an empty field so it doesn't appear in your submission email? You can do that too.





Whatever flexibility you need, Jotform's emails can handle it. And on that note, there's even a way to wrap all of your notification emails up into one handy digest email summary.



With Digest Emails, you can review new submissions — along with a breakdown of data — from one or all of your organization's forms together in one email. (Learn all about Digest Emails in [Chapter 12](#).)

"The nice thing about Digest Emails is I can send all the information 'auto-magically.' I don't have to log in, nobody has to go to Google Sheets, and it's quick to set up."

— Becky Dudley, Database Manager, **United Way Roanoke Valley**

## Reminders

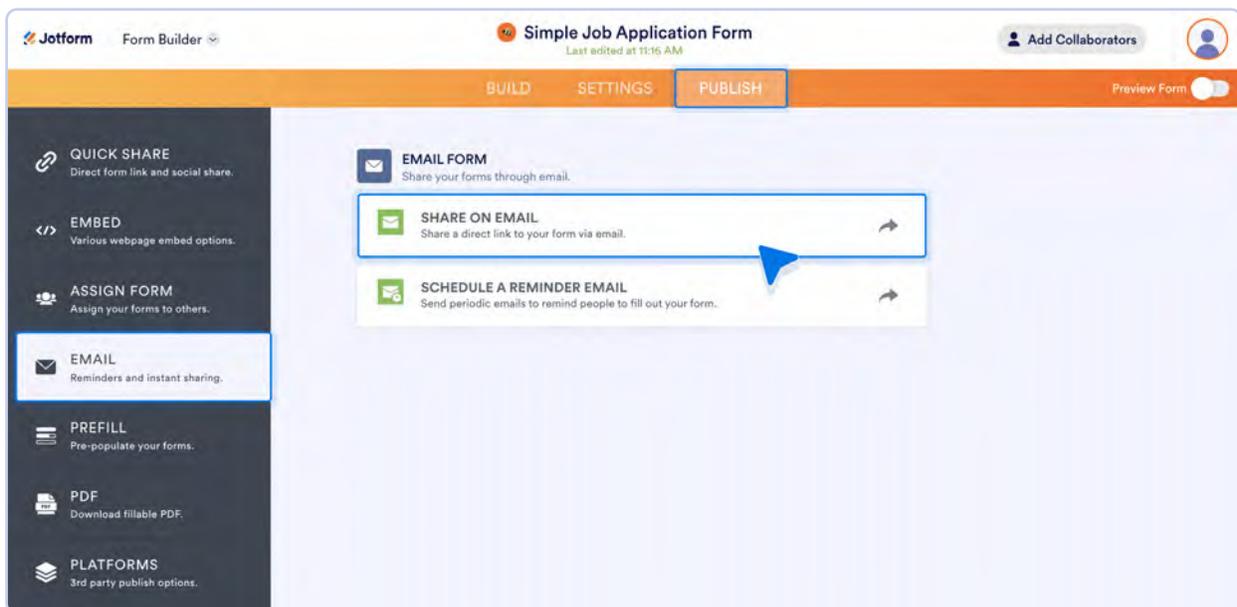
Ever send a form or a request to someone and, for whatever reason, they don't get a chance to complete it?

Yep, we've been there too.

Never fear, our reminder emails are here for just such an occasion. Schedule an automatic reminder or nudge your recipient along with a one-off email reminder to get the responses you need.

You can do this from the **Publish** tab of the Form Builder and from an approval workflow, which we'll touch on shortly.

Select the **Email** option in the left panel, and you'll see the reminder methods.



The first option, **Share on Email** is fairly straightforward. It quickly and easily allows you to send a simple reminder email that includes the link to the form.

The screenshot shows the Jotform Form Builder interface for a 'Simple Job Application Form'. The top navigation bar includes 'BUILD', 'SETTINGS', and 'PUBLISH' tabs. A sidebar on the left contains various options: QUICK SHARE, EMBED, ASSIGN FORM, EMAIL (selected), PREFILL, PDF, and PLATFORMS. The main content area is titled 'EMAIL' and has two tabs: 'EMAIL' and 'RECIPIENTS'. The 'EMAIL' tab is active, showing a form for configuring the email content. The 'Email Subject' field contains 'Simple Job Application Form'. The 'Email Content' field has a rich text editor toolbar with options for font size (11pt), bold, italic, text color, background color, link, unlink, and table. The content of the email is: 'Hi, Please click on the link below to complete this form.. <https://yourcompanyjotform.com/xxxxxx..> Thank you!'. A green 'SEND' button is located at the bottom right of the form.

For flexibility, you can use the toolbar to customize the email and ensure it fits your organization's brand and meets your needs.

The Recipients tab is straightforward; simply type in the email address of your recipient. You'll also see the default admin reply-to email, which you can change as well.

The screenshot shows the 'RECIPIENTS' tab of the 'EMAIL' configuration screen. The 'EMAIL' tab is also visible. The 'RECIPIENTS' tab contains the following fields: 'Sender Name' with the value 'Acme', 'Reply-to Email \*' with the value 'growthteam@yourcompany.com', and 'To \*' with the value 'hrteam@yourcompany.com' and an 'Add more' link. A green 'SEND' button is located at the bottom right of the form.

**REMINDER EMAIL 1** Schedule your reminder email

EMAIL      RECIPIENTS      SCHEDULE

**Email Subject \***

Here is your Weekly Job Application Form Reminder

**Email Content \***

12pt **B** *I*

**A form is waiting for you to fill out.**

Hi there,

Just a friendly reminder for you. Please click the button below to fill out the **'Simple Job Application Form'**.

**View Form**

CANCEL      SAVE

The second option, **Schedule a Reminder Email**, offers some nifty tools to easily automate your data-collection workflow.

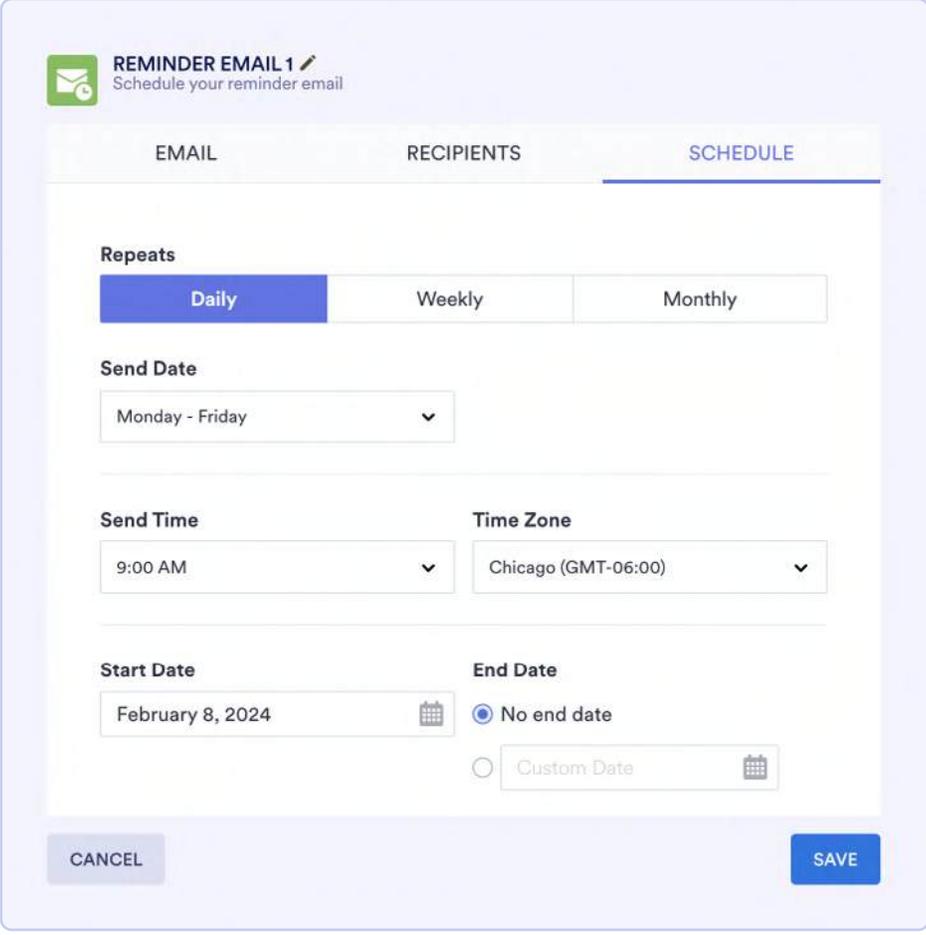
First are some additional customization tools to make the **View Form** button and overall design of the email more appealing to the recipient.

You also have the freedom to tailor the content of the message as well as the subject line. For example, you could align your subject line with the schedule for your reminder emails, as seen below.

**Email Subject \***

Here is your Weekly Job Application Form Reminder

Next to the Recipients tab is the **Schedule** tab. This is where the magic happens. Here, you can automate the reminder email cadence, the send time, the time zone, and the start and end dates (if your form is seasonal or time sensitive).

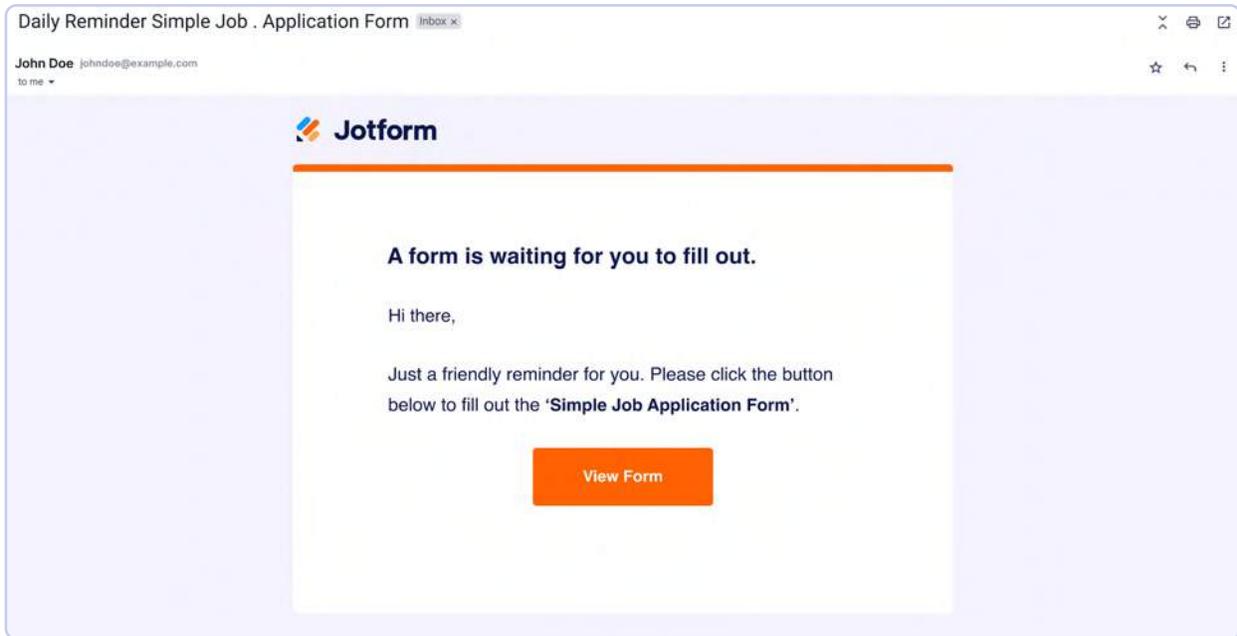


The screenshot shows the 'SCHEDULE' tab for a reminder email configuration. At the top, there is a header 'REMINDER EMAIL 1' with a pencil icon and the subtitle 'Schedule your reminder email'. Below this are three tabs: 'EMAIL', 'RECIPIENTS', and 'SCHEDULE', with 'SCHEDULE' being the active tab. The configuration options are as follows:

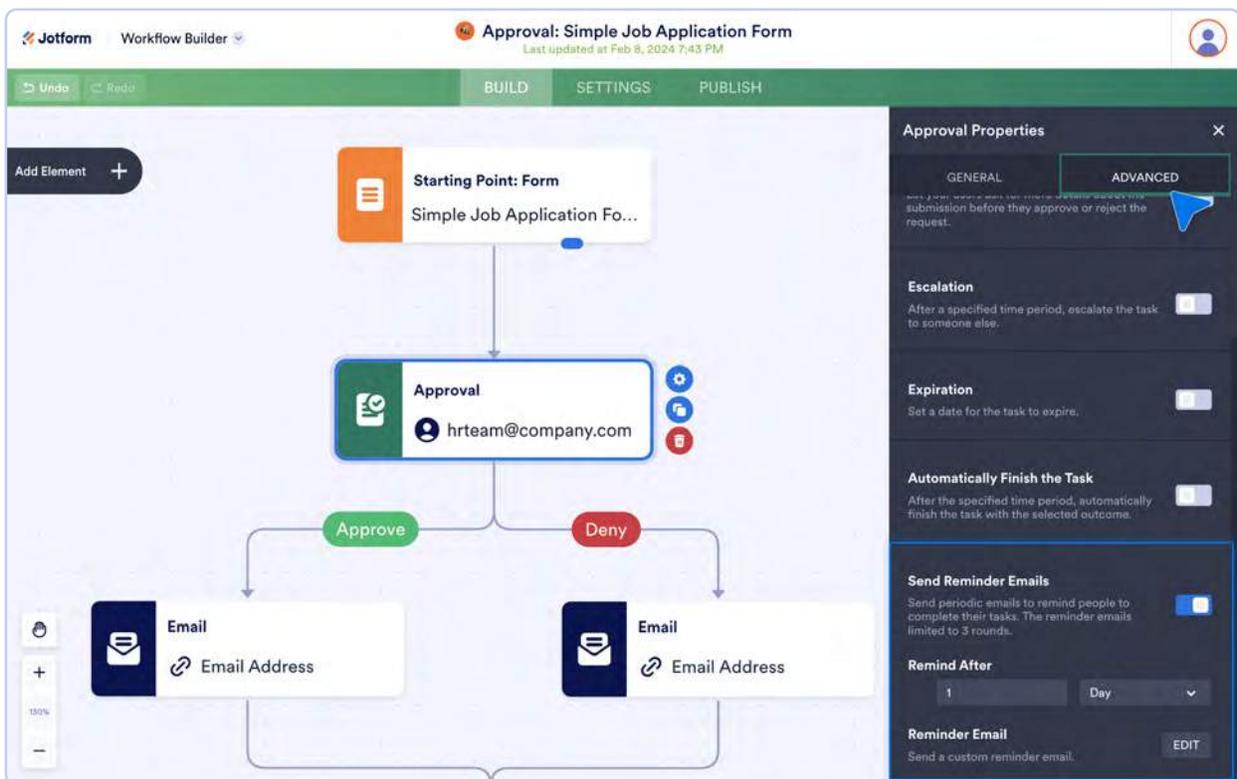
- Repeats:** Three buttons: 'Daily' (selected), 'Weekly', and 'Monthly'.
- Send Date:** A dropdown menu showing 'Monday - Friday'.
- Send Time:** A dropdown menu showing '9:00 AM'.
- Time Zone:** A dropdown menu showing 'Chicago (GMT-06:00)'.
- Start Date:** A date field showing 'February 8, 2024' with a calendar icon.
- End Date:** Two radio button options: 'No end date' (selected) and 'Custom Date' (with a calendar icon).

At the bottom of the form, there are two buttons: 'CANCEL' on the left and 'SAVE' on the right.

Depending on the urgency of your form requests, you can send your reminders daily, weekly, or monthly. This gives you the ultimate flexibility to stay on top of your form responses in a way that saves time and lessens manual attention. However, note that once your recipient submits their form, the scheduled reminder will continue to be sent until you or the form owner stops the scheduling process.



Finally, if your organization is using Jotform Workflows to create a streamlined operational workflow, you can enable nifty reminder email functionality in the Workflow Builder.



Select the appropriate **Approval** element and click on the gear icon. In the Advanced tab of the Settings menu, toggle on **Send Reminder Emails**.

There are several customization options available for reminder emails in Approvals, including setting up an SMTP address as the sender. Check out [Chapter 11](#) for more tips and how-tos.

\*\*\*

A strong email game that keeps everyone up to speed on your form's status and submission data can have a big impact on your success. Plus, it plays a critical part in your larger marketing strategy of customer engagement, internal workflows, and brand experience.

Timely and helpful emails about your forms keep your customers, stakeholders, and even yourself on top of things so nothing gets lost in the shuffle.

Next we'll take a look at ways to distribute your forms. Read on to explore more ways to communicate and solicit data and feedback to inform your goals, your team, and your organization as a whole.

## Chapter 9

# How to secure your forms

Trust. It's the basis of any good relationship.

And the relationships you've built with your customers, suppliers, donors, patients, sponsors, and other form respondents are even more important than family and friends. That's because your family and friends will give you another chance.

The moment you ask someone to fill out a form, you're asking them (implicitly) to trust you with their personal information, ideas, and thoughts. By doing so, you're creating a relationship.

We all want to treat those relationships the right way. That means the forms you're using at the core of this exchange need to be secure and reliable. Any breach can cause you — or worse, your organization — to lose trust and damage the relationships you've worked so hard to cultivate.

As no-code solutions become more popular, they also become attractive targets for spammers and hackers looking to take advantage and gain access to data.

Jotform now averages *more than 1.5 million form submissions a day*. With the amount of data and information transmitted through forms, security has to be at the forefront of what we do, and this is true at a website, account, and individual form level.

That's why, among other security features, Jotform has the highest level of mitigation and multiplatform intrusion detection for DDOS attacks and server monitoring. Now, if that reads like a lot of fancy words that don't mean anything, we hear you. Broken down, it basically means we take form security very seriously, and you should too.

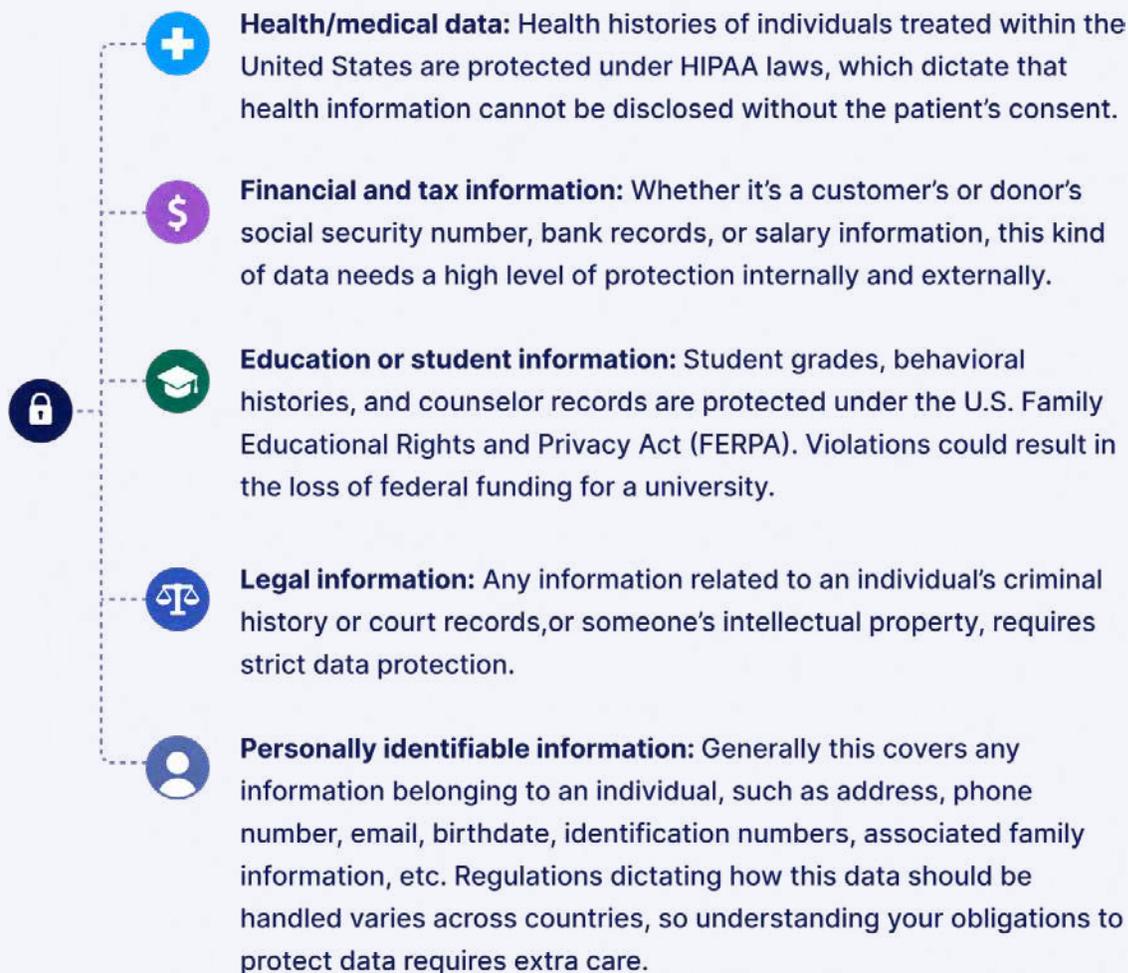
In this chapter, we'll walk with you through this journey and be your resource for secure forms. Different organizations have different security needs (i.e., a healthcare organization will need security measures that enable HIPAA compliance while a thriving e-commerce business may be focused on payment data protection).

For this reason, we've built the tools to empower you to customize your own settings, so you can properly secure your forms (and account) to fit your organization's needs.

## What kind of data needs to be secured?

The short answer to this question — when it comes to your customers' data — is every kind. But there are certain kinds of data that, due to their sensitive nature, require a heightened level of security.

Here's an example of form data types that need extra security:

- 
-  **Health/medical data:** Health histories of individuals treated within the United States are protected under HIPAA laws, which dictate that health information cannot be disclosed without the patient's consent.
  -  **Financial and tax information:** Whether it's a customer's or donor's social security number, bank records, or salary information, this kind of data needs a high level of protection internally and externally.
  -  **Education or student information:** Student grades, behavioral histories, and counselor records are protected under the U.S. Family Educational Rights and Privacy Act (FERPA). Violations could result in the loss of federal funding for a university.
  -  **Legal information:** Any information related to an individual's criminal history or court records, or someone's intellectual property, requires strict data protection.
  -  **Personally identifiable information:** Generally this covers any information belonging to an individual, such as address, phone number, email, birthdate, identification numbers, associated family information, etc. Regulations dictating how this data should be handled varies across countries, so understanding your obligations to protect data requires extra care.

**Did you know?**

The Higher Education Community Vendor Assessment Toolkit (HECVAT) is used by higher education institutions to ensure that their cloud services and software vendors meet security and data standards. Jotform Enterprise has completed the HECVAT self-assessment. You can find more information at <https://www.jotform.com/enterprise/hecvat/>.

## Ways Jotform helps you secure your forms

There are several measures you can take to secure your form data, form distribution, and account on the whole. First, it's helpful to understand the difference between a secure form, a form that's HIPAA friendly, and an encrypted form.

### Secure forms

By default, all of the forms created within Jotform are secured with a 256-bit Secure Sockets Layer (SSL) connection, so all form submissions are protected according to the industry standard. Jotform Enterprise is designed to comply with the CCPA, which details specific protections for California residents. This is a base level of form security that requires no additional action on your part.

Jotform Enterprise also offers local data residency centers to help you comply with Australian data sovereignty laws and the European Union's GDPR regulations for data residency. You can also include a consent checkbox on every form that sends out emails to make sure respondents opt in.

Enterprise customers can also request to have their servers provisioned in our SOC 2 Type II environment. This enables you to deploy custom forms and apps on our hosted platform using systems that are not only secured and managed by Jotform but are designed to comply with SOC 2.

### HIPAA-friendly forms

Healthcare organizations, doctors, and medical offices all need to meet HIPAA compliance standards to secure ePHI (electronic protected health information).

To provide HIPAA-friendly forms, we provide a HIPAA server with a database encryption layer that goes beyond the encryption of standard servers for Enterprise accounts. The HIPAA server allows you to maintain the visibility of user activity while managing sensitive data with role-based access and secure user account logins.



When writing raw data to the database, the server is encrypted with AES256. Every individual submission has a unique key, and every individual AES256 key is also encrypted with the user's public key (RSA2048). Keys are seamless to users and completely managed by Jotform.

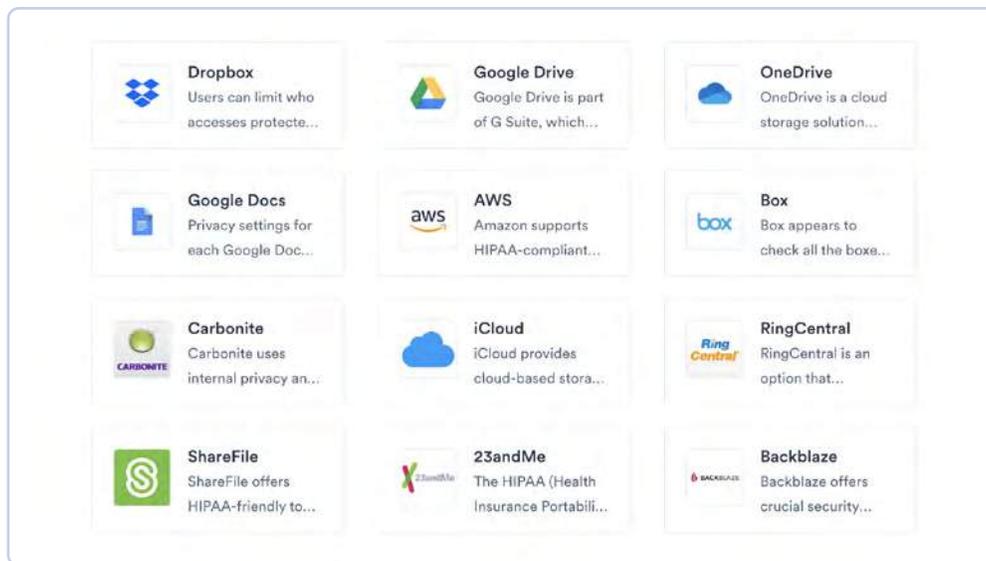
In short, in addition to the regular disk encryption, HIPAA servers also have database encryption.

To upgrade your current (or new) account for HIPAA compliance, contact your Enterprise Customer Success Manager or our Sales team. You can learn more about HIPAA servers and considerations for upgrading your server on the [Enterprise FAQ page](#).

If your account is enabled for HIPAA compliance, you will see a badge displayed at the top left.

Also note that in the footer of your forms is a HIPAA compliance badge to signify to your form recipients that your form is secure according to HIPAA regulations.

Jotform is known for its connectivity options, and HIPAA compliance extends to the third-party software integrations you use. The HIPAA requirement mandates end-to-end HIPAA compliance so that PHI access can be traced for each known, unique individual.



Currently, there are a number of HIPAA server integrations you can use, including Salesforce, Google Drive, OneDrive, Slack, Box, and more, but be advised that not all integrations facilitate HIPAA compliance. Use our handy [HIPAA Integrations user guide](#) to search integrations by name or category type.

Every HIPAA-friendly form comes with built-in safeguards, purely focused on data security and privacy, without requiring any action from users. And yet, it's important to understand that it's your legal responsibility to maintain HIPAA compliance.

For instance, if data ends up in the hands of users who either don't have accounts (and thus can't be traced), or is communicated via email outside of the Jotform platform, these instances would no longer be HIPAA compliant.

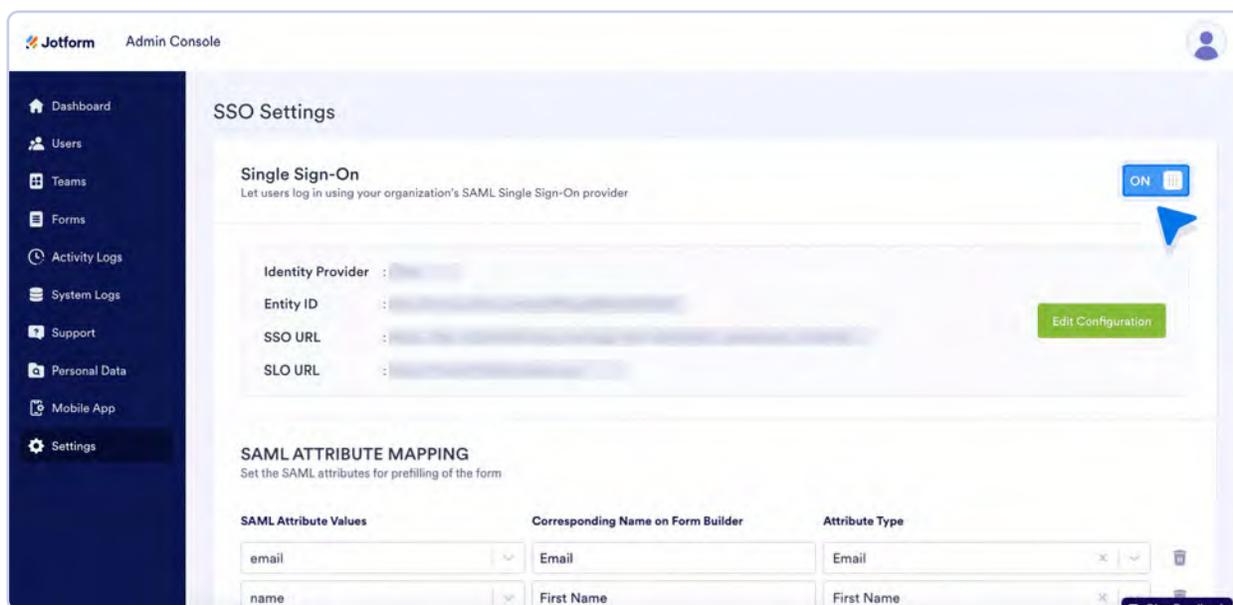
## SSO (single sign-on)

Single sign-on gives your organization a way to ensure the security of your data at scale.

SSO allows your employees to access Jotform by verifying their identity through a single sign-on. An employee is issued one master username and password to sign into a trusted third-party account, often known as an identity provider, like Okta, Microsoft Entra, or OneLogin. That provider then confirms the employee or member's credentials, access, and, in some cases, access levels for the app or site.

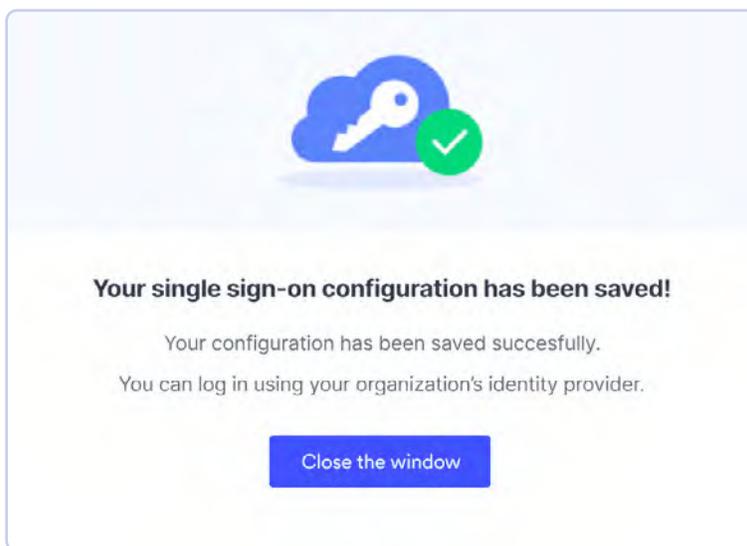
Another benefit of SSO is data accuracy. Users' (or employees') data is already stored in your identity provider's database. So when you enable SSO for your forms, your users' commonly stored credentials (first/last name, email, company role, etc.) are prefilled, preventing blank fields, misspellings, errors, and more from being submitted.

To let users log in using your organization's Security Assertion Markup Language (SAML) single sign-on provider, access the **Settings** tab in your **Admin Console**. We'll go into more depth on the Admin Console in a bit, but for now, toggle on the **Single Sign-On** switch.

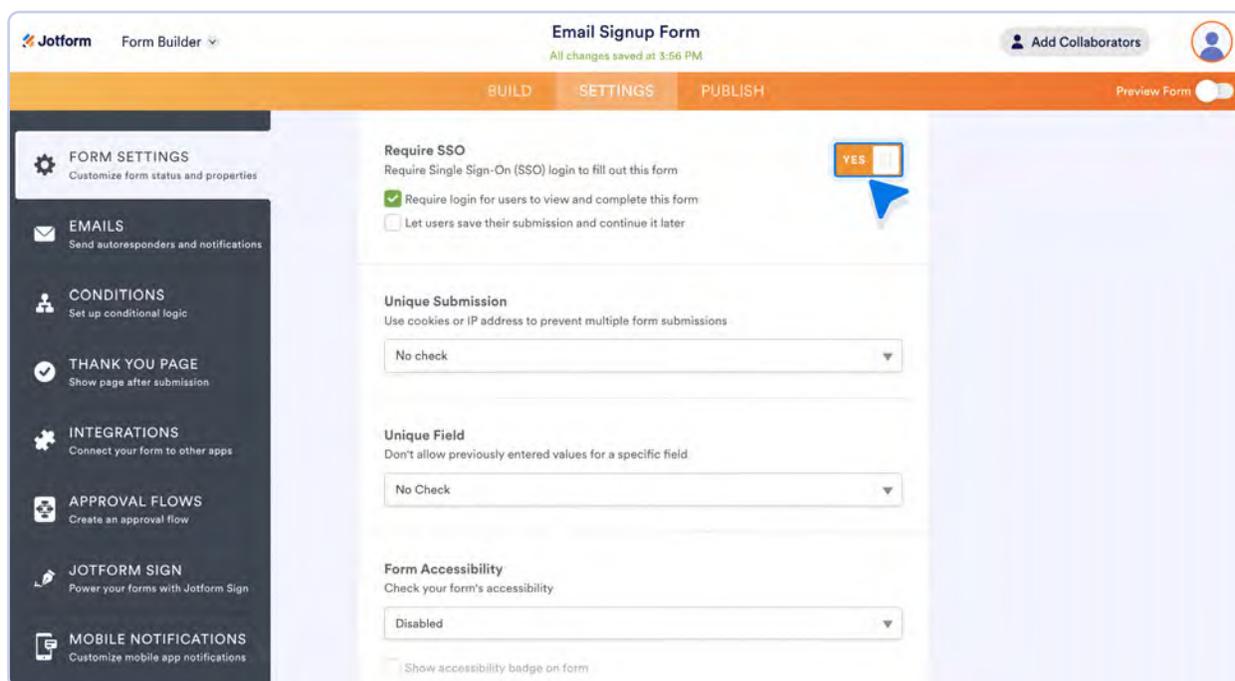


From there, you'll need to provide your SSO provider's metadata, which can be found within your existing SSO provider profile.

Once you enter your metadata values, click **Save** and test the configuration by clicking on the **Continue** button. Your configuration will be saved when it passes the test. At that point, you and others can log into your server (and Jotform platform) using SSO.



If you wish, you can also enable SSO for the *recipients* filling out your forms. To enable SSO for your form recipients, in the Form Builder, go to **Form Settings** under the **Settings** menu for your chosen form, and click the **Show More Options** button. Toggle on the **Require SSO** switch.



Now, when a recipient gets your form (and isn't logged in to your Enterprise server), they will be prompted to log in via SSO.

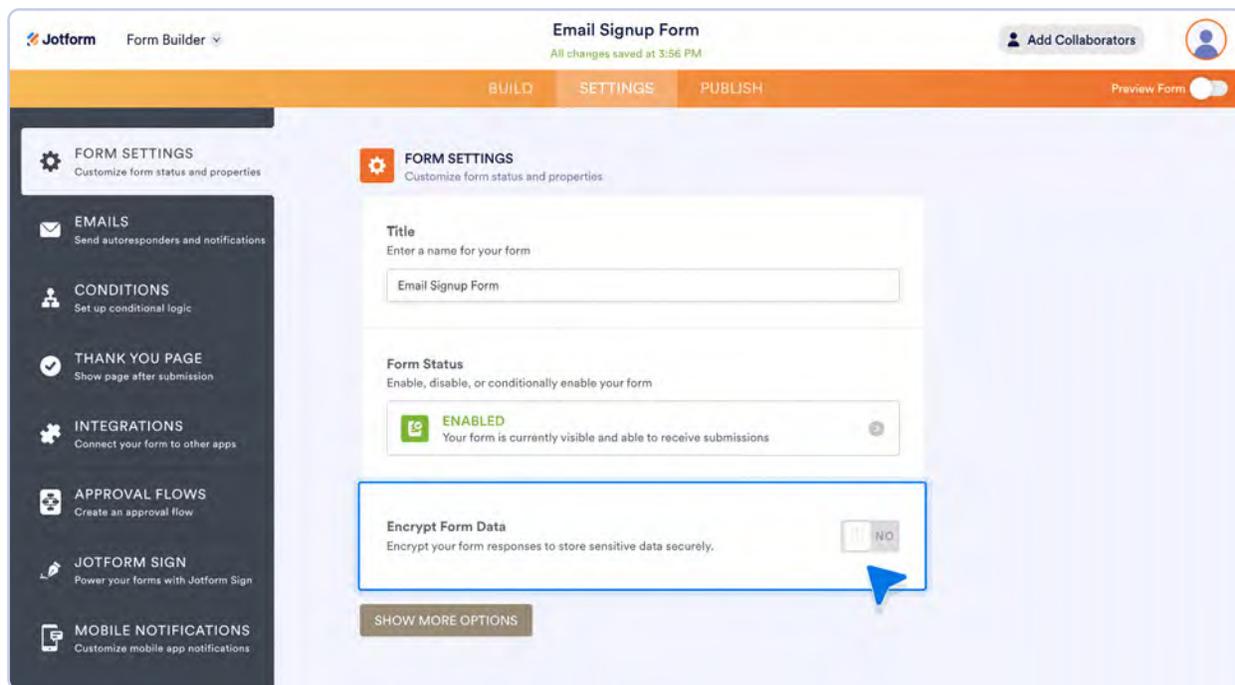
There are some other neat SSO features you can employ, like the **Save and Continue Later** function for recipients, which allows them to pick up where they left off if they're interrupted while filling out the form, and SSO Prefill, which automatically fills in certain attributes/fields for the user in the form.

## Encrypted forms

Encrypted forms provide an alternative layer of security that Enterprise account holders can use to protect form submissions.

Our forms are symmetrically encrypted, meaning the encryption process is simplified with a single password to both encrypt and decrypt data. End-to-end encryption is also form based. Each form has its own password, so you can tailor your data security options to each form.

In the Jotform Form Builder, the **Encrypt Form Data** option is listed within the **Form Settings** tab of the left navigation under the **Settings** main tab.



When you switch the toggle to “Yes,” you’ll be prompted to verify that it’s indeed you who wants to encrypt your form data. This is an extra step to deter others from gaining access to your data.

Enter your Jotform account password or verify your email through Google.

Set your encryption password — but be cautious.

This is the only password you'll be able to use to access your encrypted data later on, so be aware that *if you lose your password, you'll lose access to the data for that form* (we can't recover it for you).

When you click **Enable Encryption** to set up your encrypted form, you'll notice that an Encrypted Form badge now appears in the bottom right of the form.

You shouldn't share your password with anyone else. The goal with form encryption is total security.

Whenever you receive new encrypted form submissions, you'll be notified by email. You can check your encrypted form data by visiting Jotform Inbox or Jotform Tables for that form.

One final note to be aware of is that encryption does sacrifice some post-submission functionality.

Here are some of the form features that aren't available with encrypted forms:

- **PDF downloads (PDF documents and fillable PDF forms).** You can, however, view the data in Jotform's PDF Editor (and print it).
- **Jotform Sign.** The automation portion of Jotform Sign (digital certificate, audit log, etc.) can't be generated with encrypted forms. The basic signature element in the Form Builder is compatible with Encrypted Forms 2.0 as long as Jotform Sign automation isn't enabled.
- **Third-party integrations.** Payment gateways, however, do still work.
- **Form emails (Notifications and Autoresponders).** Because your private key information doesn't hit our servers, this information can't be sent.

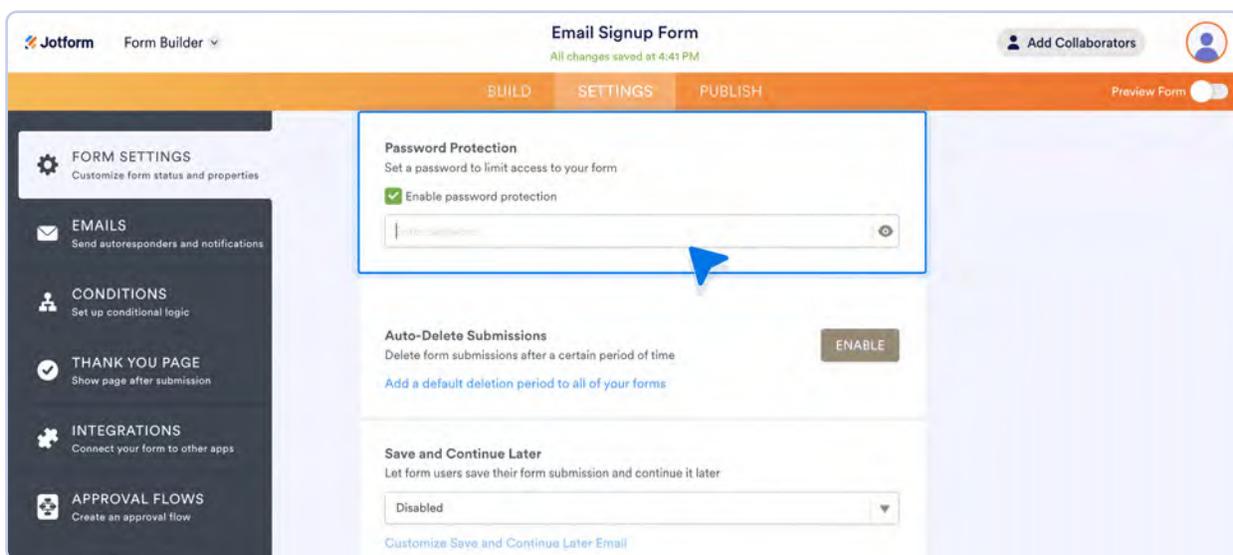
## Password-protected forms

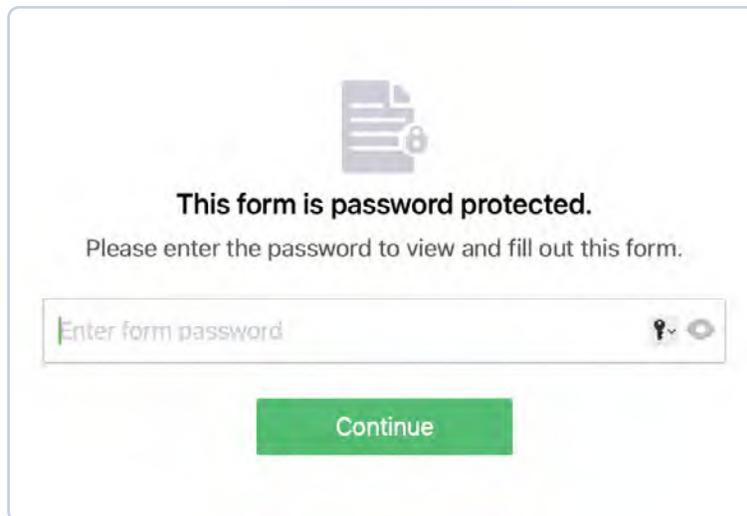
A password for every app is an accepted norm these days, so why not secure your forms the same way?

Unlike end-to-end form encryption, using password protection to maintain privacy retains all post-form submission functionality. Password protection ensures that only the people you want to fill out your forms will do so, ending any chances of spamming.

Additionally, passwords allow you to get creative in how you use your form. For example, associating a password with your form can be a neat solution for offering product discounts, providing registrations to events, or keeping organizational information internal.

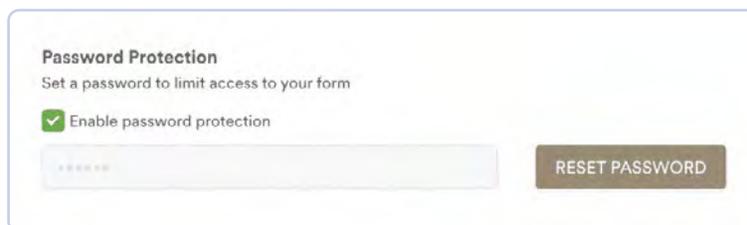
Similar to encrypted forms, the password protection option is available within the Form Settings tab under the Show More Options button. Once you set up the password, you're good to go, and your recipient will be prompted to enter the password to access your form.





The screenshot shows a form that is password-protected. At the top, there is a document icon with a lock. Below it, the text reads: "This form is password protected." followed by "Please enter the password to view and fill out this form." There is a text input field with the placeholder text "Enter form password" and a small icon of a key and a lock. Below the input field is a green button labeled "Continue".

Don't worry; unlike with form encryption, if you forget your password, you can go back and reset it later.



The screenshot shows the "Password Protection" settings in Jotform. The title is "Password Protection" and the subtitle is "Set a password to limit access to your form". There is a checkbox labeled "Enable password protection" which is checked. Below the checkbox is a text input field with a password mask (dots). To the right of the input field is a button labeled "RESET PASSWORD".



### Did you know?

For an extra measure of security, you can also password protect the PDF attachments of the user's submission(s). Simply enable password protection in the advanced email settings for the form.

## PCI certification for credit card payments

In the last chapter, we touched on accepting payments with your forms. Collecting credit card payments for your orders, invoices, donations, and bookings means it's all the more important for you to protect your customer's credit information. Jotform has security processes in place to do just that.

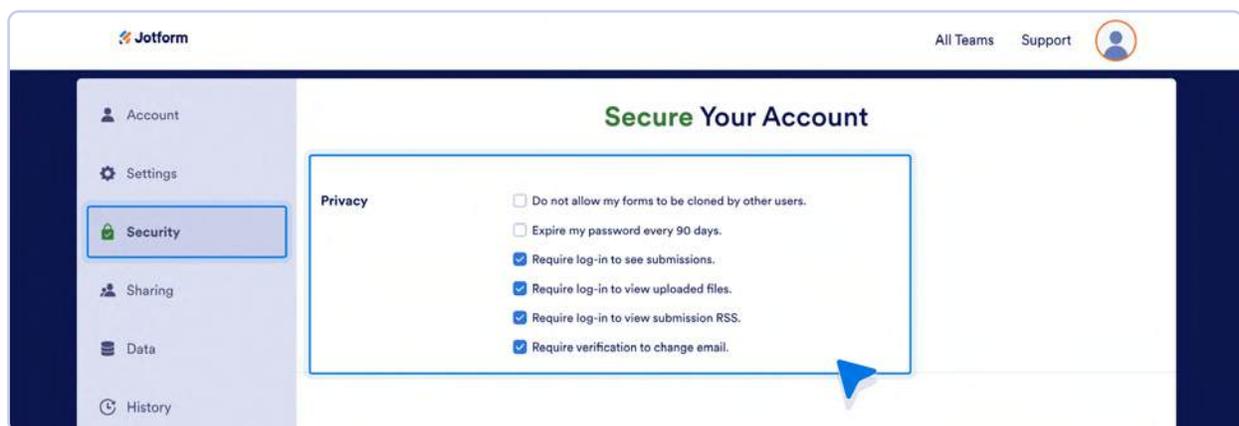
All of your online forms are PCI DSS Service Provider Level I compliant (the security standard set by the major global credit card companies and the highest security rating available). This essentially means your customers' data will remain safe as they use your payment forms.

Conveniently, you can choose from 40+ different payment gateways to use in conjunction with your forms. And while most of the payment flows are completely handled by your chosen third-party processor, for those that aren't — Authorize.net, Card Connect, and Braintree — the users' credit card information is processed over our PCI servers but never stored in any way. Plus, Jotform doesn't take a percentage of the payments you collect.

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Finally, there's another handy way to secure your account and forms. Among the controls in your **Account Security** screen, you can require a login to view uploaded files (for organizations that need to accept and transmit assets) or set your password to expire every 90 days as a backup measure.

The flexibility you need is at your fingertips.



The number and variety of security features baked into Jotform Enterprise will give any Jotform customer peace of mind — but some will need security features that meet enhanced and independently audited security protocols to meet government standards.

Jotform has a solution for that too.

## Jotform Government

Jotform Government optimizes Jotform Enterprise for government agencies, those who do business with them, and schools or universities that must qualify for state-sponsored funding.

How?

By pursuing FedRAMP authorization. The Federal Risk and Authorization Management Program (FedRAMP) provides authorization for cloud services that want to do business with the U.S. government. The FedRAMP Board includes the Department of Defense, the Department of Homeland Security, and the General Services Administration (GSA), along with other agencies selected by the FedRAMP director and GSA administrator.

To provide ultimate security, Jotform stores data in Google's FedRAMP-compliant data center.

Additionally, Jotform Government is listed on the StateRAMP authorized product list as a progressing SaaS provider. As part of the process of becoming an authorized product, Jotform is enrolled in StateRAMP's Progressing Snapshot Program, which includes quarterly assessments (snapshots) and the submission of artifacts — documents created with assistance from third-party assessment organizations (3PAOs) that verify an organization meets StateRAMP requirements.

What's more, Jotform Government has obtained Texas Risk and Authorization Management Program (TX-RAMP) authorization for use by government entities in the state of Texas.

Jotform Government currently meets the enhanced security protocols organizations need, including

- A verified secure cloud solution
- Data hosting in Google's FedRAMP-compliant data center
- Ongoing risk mitigation and compliance with data security regulations

Jotform Government brings the power of Jotform Enterprise to state, local, and education (SLED) organizations such as city and county governments, statewide government institutions, and universities and educational institutions that receive state funding. If you'd like to access Jotform Government or learn more about it, reach out to our sales team or your Enterprise Customer Success Manager.

## Data and privacy regulations and what they mean

With the advent of the digital age, and the amount of data being transferred across our connected world in the cloud, we need technological standards at both a governmental and geographic level.

These standards not only prescribe minimum levels of security for the companies collecting information, but they also provide crucial protections and privacy for the individuals providing their data.

When you start diving into the regulations, it's easy to get lost in all the acronyms, but let's take a quick look at what they are and what they mean for your organization.

| Data/Privacy Regulation   | What is it?  | What does it mean to you?  |
|---|--|--|
|  <p><b>HIPAA</b><br/>Health Insurance<br/>Portability and<br/>Accountability Act</p> | <p>The U.S. Health Insurance Portability and Accountability Act protects individuals' personal information and health records. HIPAA requires healthcare institutions and organizations that handle health and medical records to follow certain standards in order to safeguard this information.</p>   | <p>This regulation mainly applies to healthcare-related companies, but if your organization collects any type of medical records or health data, you'll need to ensure you abide by HIPAA guidelines. Jotform's HIPAA-friendly forms are available starting with our Gold plans.</p>   |
|  <p><b>GDPR</b><br/>General Data<br/>Protection Regulation</p>                       | <p>In 2016, the European Union and the United Kingdom approved the General Data Protection Regulation, or GDPR, although it didn't go into full effect until 2018. Designed to give consumers more control over how their personal data is used by companies, GDPR sets guidelines for the collection and processing of personally identifiable information of individuals who live in (and outside) of the European Union.</p>  | <p>Companies that have any EU-based customers have to abide by GDPR regulations, regardless of where their websites are based. Moreover, under GDPR, if a company experiences a data breach, it must inform its EU and U.K. consumers about what's being done with their data.</p> <p>Conveniently, Jotform makes it easy for you to show that you use the site in a GDPR-compliant way. We provide a Data Processing Addendum (DPA), a self-serve and easy-to-execute document presigned by Jotform. Once the DPA is filled out, electronically signed, and submitted, it will automatically be sent to us so there's a record that this important document was put in place.</p> |
|  <p><b>CCPA</b><br/>California Consumer<br/>Privacy Act</p>                        | <p>The California Consumer Privacy Act (CCPA) went into effect in 2020 and aims to protect the on- and offline data of consumers in the state of California. Under the CCPA, California consumers can opt out of the sale of their personal data, which can include anything defined as personally identifiable information (PII).</p> <p>Though the CCPA and GDPR have a lot in common, the CCPA protects consumers a bit more by requiring businesses to</p> <ul style="list-style-type: none"> <li>• Include a "Do not sell my personal information" link on their websites and privacy notices</li> <li>• Describe the data they share with service providers</li> </ul> | <p>Jotform complies with the CCPA and never sells users' data to third-party organizations without their permission. Any organization collecting data should ensure it's abiding by the guidelines of the CCPA and giving users the option to opt out of the sale of their data and an opportunity to understand how it's being used or shared.</p>  |

| Data/Privacy Regulation  | What is it?   | What does it mean to you?  |
|--|---|--|
|  <p><b>FERPA</b><br/>Family Educational Rights and Privacy Act</p>            | <p>The Family Educational Rights and Privacy Act is a U.S. federal law mandating that parents have a right to access their children's education records, have those records amended, and maintain control over their children's related PII. The law prohibits the sharing of that data without a parent's written permission. When eligible students turn 18, or enter postsecondary education at any age, these rights then pass to them.</p> | <p>If you're an administrator in a learning institution or even a teacher using forms for online quizzes, data records for students must be protected at all levels. Violations of FERPA can restrict funding for your institution. And because this robust law contains pretty dense language, Jotform offers a <a href="#">comprehensive guide</a> to help you understand it in more detail.</p> |
|  <p><b>FedRAMP</b><br/>Federal Risk and Authorization Management Program</p>  | <p>The Federal Risk and Authorization Management Program (which was founded in 2011) promotes the use of secure cloud services across the federal government by providing a security standard with continuous assessment, authorization, and monitoring.</p>  | <p>If your organization works with the United States government, FedRAMP authorized cloud software is a must have. Plus, continuous monitoring of software that falls under the FedRAMP umbrella provides peace of mind as your organization grows.</p>  |
|  <p><b>StateRAMP</b><br/>State Risk and Authorization Management Program</p> | <p>Established in 2020, the State Risk and Authorization Management Program is a nonprofit membership group that sets the bar for StateRAMP authorization. Its members work in a variety of disciplines across the United States.</p>   | <p>Any organization that works with state or local government programs needs cloud software that meets StateRAMP standards. Regular standard checks from this nonprofit program ensure standards are consistently met.</p>   |
|  <p><b>TX-RAMP</b><br/>Texas Risk and Authorization Management Program</p>  | <p>The Texas Risk and Authorization Management Program is a Department of Information Resources (DIR) program that reviews security measures enacted by cloud products and services when transmitting data to Texas state agencies. It was created in 2022.</p>   | <p>TX-RAMP is essential for organizations working with governmental programs and institutions in the state of Texas, the second-most populous state in the U.S.</p>  |

## Providing secure access

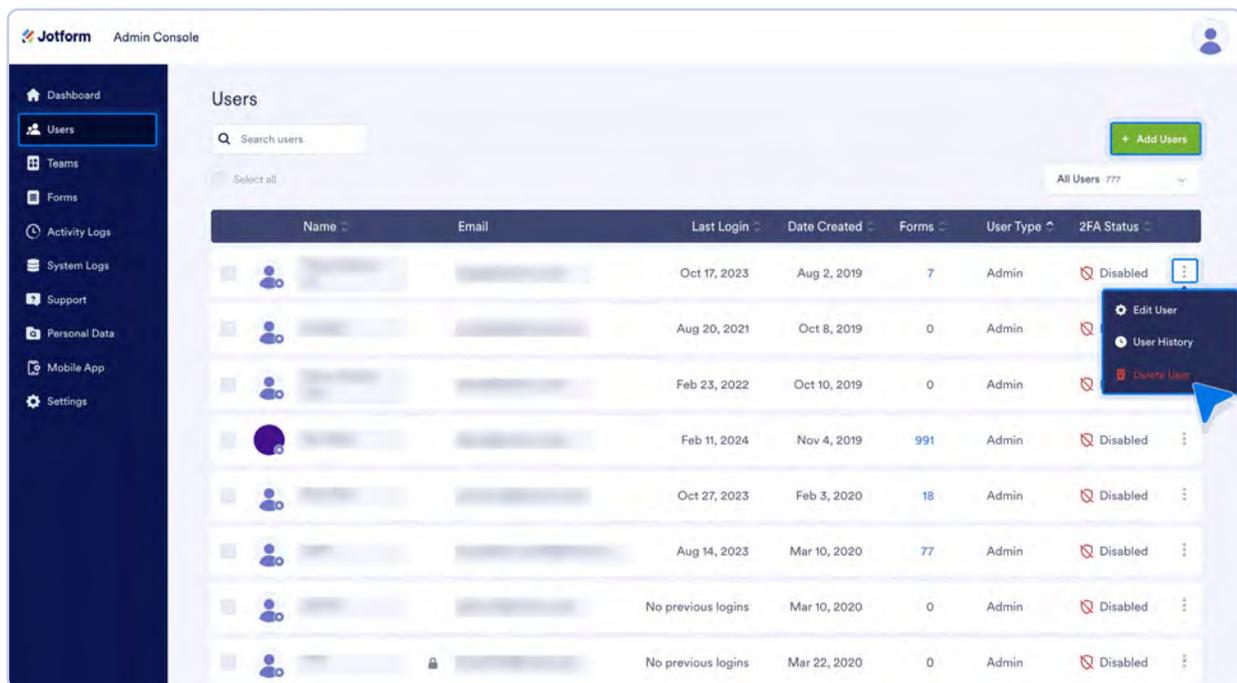
### The Admin Console

As we've mentioned, a valuable benefit of Jotform Enterprise is the ability to make your forms accessible to multiple users *without* compromising security (since there are no shared logins).

With multiple user functionality, you, as the admin, have full control over which users have what permission settings. You can also add or delete users, filter your user list, send notifications, and review user activity for easier management.

This way, you'll ensure that anyone in your organization who needs access to forms will be as efficient as possible — because their account and form access will be custom suited to their role.

Simply click the **Add Users** button in the **Users** tab of your Admin Console to bring on someone new. Or, if you need to edit a current user's access or delete a user, click on the hamburger menu on the far right side of the row for that user.



In addition to maintaining users, the Admin Console gives you another way to access the different Jotform Teams that have been created within your organization. To manage the members of the team, simply click into a team from your console and access the general settings. (We'll dive deeper into this functionality in the next section.)

| Team           | Members | Privacy           | Created By | Date Created |
|----------------|---------|-------------------|------------|--------------|
| Marketing Team | 2       | Organization Only | [Redacted] | Feb 11, 2024 |
| Growth Team    | 1       | Organization Only | [Redacted] | Feb 11, 2024 |
| Revenue Team   | 1       | Organization Only | [Redacted] | Feb 9, 2024  |
| Content Team   | 1       | Organization Only | [Redacted] | Feb 9, 2024  |
| Designer Team  | 1       | Organization Only | [Redacted] | Feb 9, 2024  |
| Product Team   | 1       | Organization Only | [Redacted] | Feb 9, 2024  |
| Finance Team   | 1       | Organization Only | [Redacted] | Feb 8, 2024  |
| HR Team        | 1       | Organization Only | [Redacted] | Feb 8, 2024  |

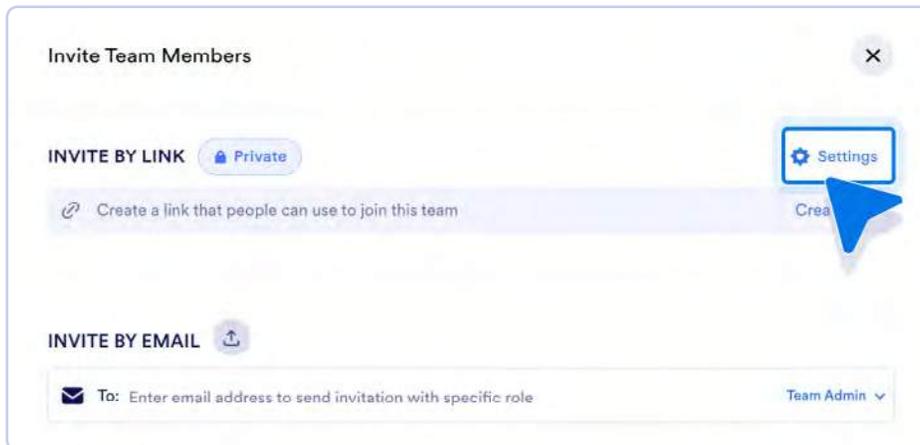
Every so often it's a good idea to keep a bird's-eye view of your account activity across the organization. This will help you make sure everything is running as it should.

From your Admin Console's **Activity Log**, you can see what's taken place with your organization's users and forms over the last seven days (or a date range of your choosing). You can also filter your view by user and activity type, covering both form and account actions.

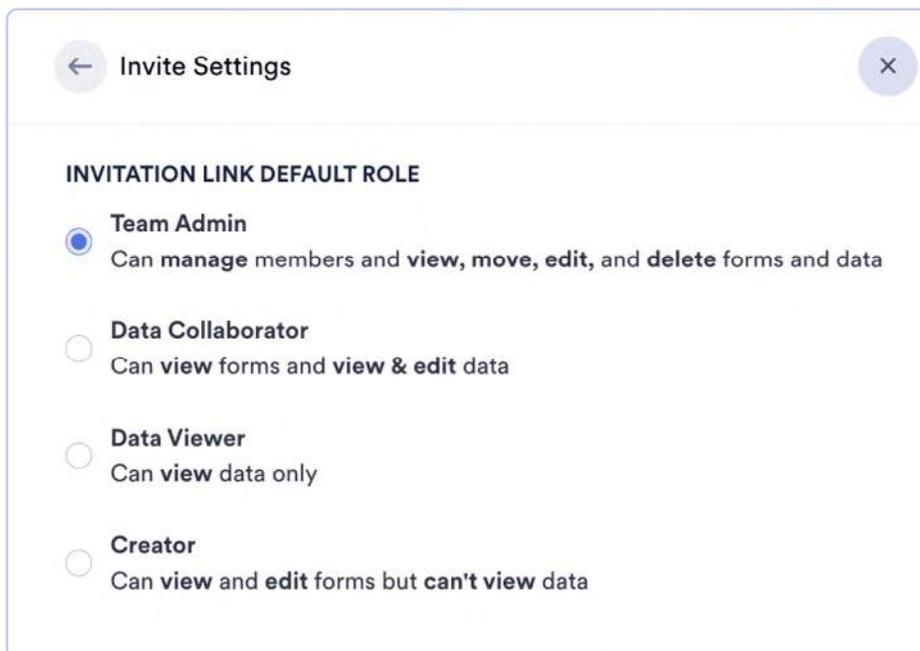


And any assets the team creates and adds to the shared workspace are owned by the whole team. So not only does each team member always have access to up-to-date information, but in the event that a team member leaves the organization, the assets they created are still accessible.

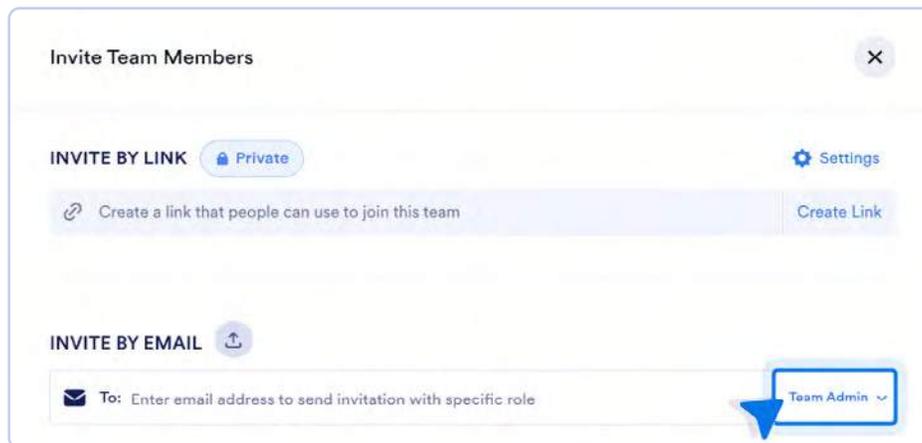
Any admin can invite new members to their team by clicking on the **Invite** button in the top right of the Teams home screen. When you select **Settings**, a window will open allowing you to assign the default form/data access for each new member's role.



The access levels range from Team Admin (full member and data management) to Data Viewer and Creator roles. Role-based access ensures your users will have access only to the data and permissions you want them to have.



You can adjust a user's access when you invite new team members by email.



## Securing form distribution

Whether it's form access, form submissions, or your account itself, there are certain steps you can take to ensure you're protecting everyone as much as possible.

### Form access

When you're ready to distribute your form, one of the simplest security measures is selecting the right access setting. You have three settings to choose from, and it may be helpful to understand what makes them different and in which scenario you might want to use each:

- **Public access.** Available to anyone, public access is the default access setting and is most often used for very general forms, such as contact forms, order forms, or other open forum needs.
- **Private access.** A private form is available only to recipients you have specifically invited to fill out the form. These are best used in scenarios like conducting research among a limited number of respondents or giving a test or quiz to students in a certain class or institution.
- **Company access.** To limit form access only to those within an organization, choose company access. Examples of this kind of usage are internal-only forms like work orders, project authorizations, employee reviews, issue trackers, audits, inspection forms, and so on.

Public and Private access are pretty straightforward. However, with Company access, there are two types of access permissions you can give. The first requires all respondents to have the same organizational email domain. The second requires login with single sign-on (SSO), which is available only to Enterprise accounts.

Settings

**Company Access**  
Only available to people in your organization.

**COMPANY ACCESS PERMISSION**

**Require organization email domain**  
example.com

**Require SSO**

**PERMISSIONS**

**Submit Only**  
Invited people can **view** and **submit** the form only.

**Submit & View Later**  
Invited people can **submit** the form and **view** their submissions later.

**Submit & Edit Later**  
Invited people can **submit** the form and **view and edit** their submissions later.

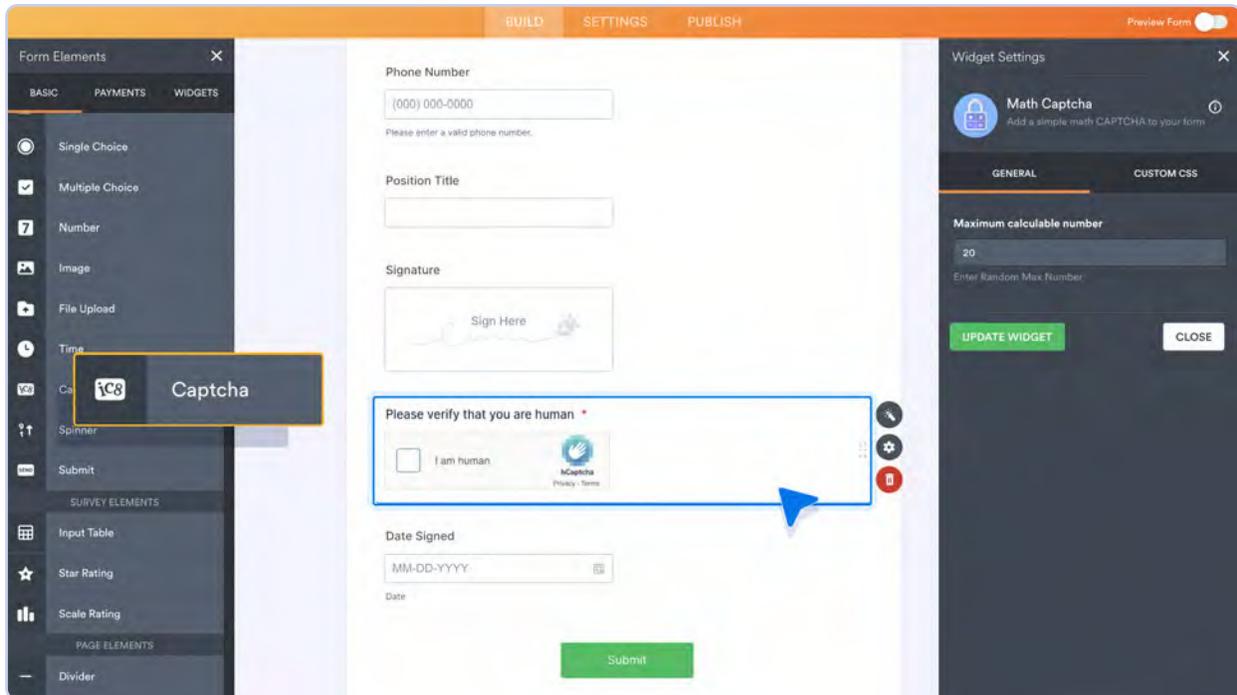
## Form submissions

Spam and phishing attacks can clog up your inbox, confuse your team, and create leaks (if responded to). So it can't hurt to provide another layer of security that extends all the way to the form submissions you receive.

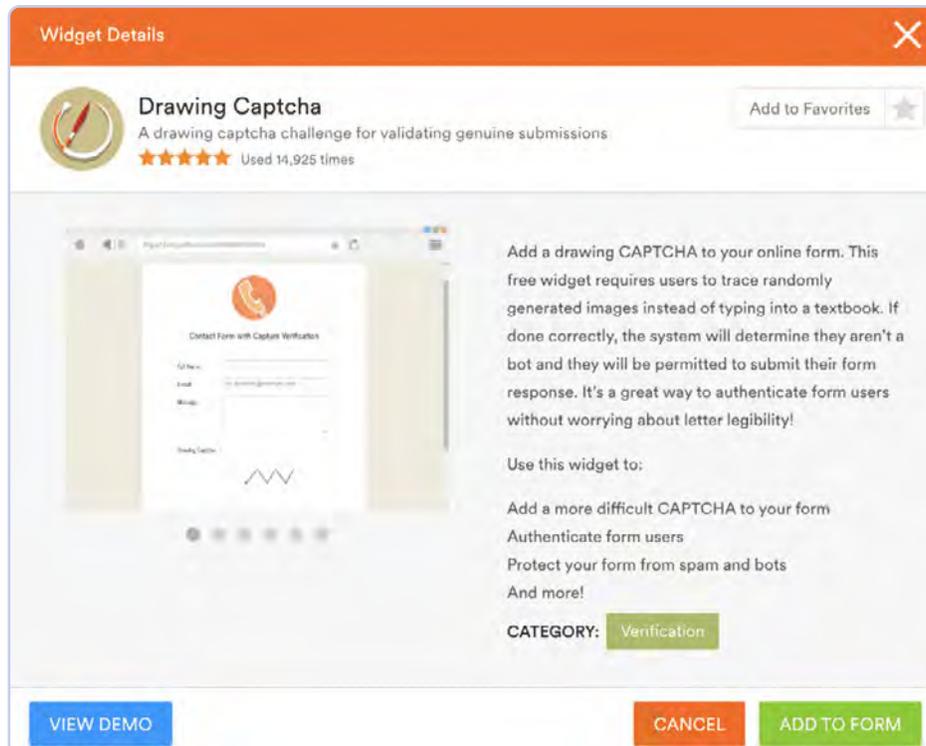
To combat spam submissions, there are Captchas and widgets you can use in your form.

Here are a couple:

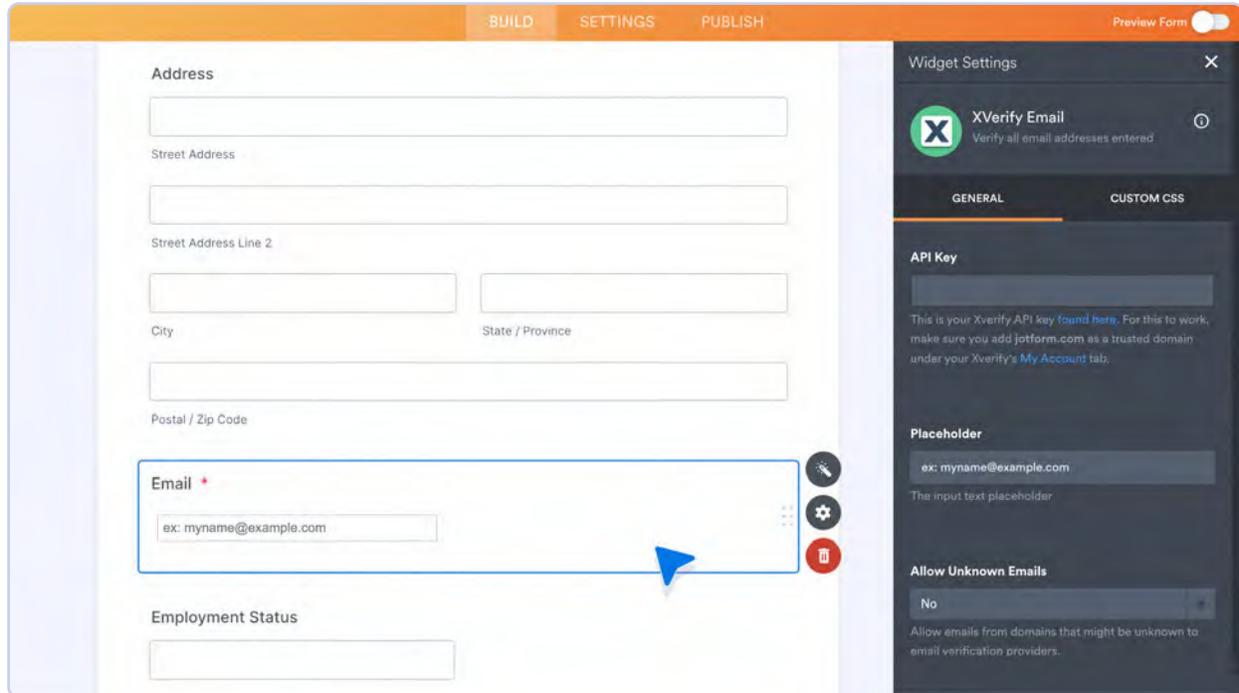
- **Jotform Captcha.** Captchas are a good way to authenticate your form users. By requiring users to perform a simple yet randomly generated action, Captchas determine that your user is real and not a bot. For convenience, our Captcha is a basic form element you can drag and drop into your form.



- **Captcha widgets.** We also have Captcha widgets that prompt the user to draw something or solve a math problem.



- **Email validation widgets.** Another cool way to authenticate your form users is by validating the email address used in your form. Validation widgets like XVerify and the E-mail Validator are great at automatically checking the validity of the address entered. This way, your user will be required to enter a valid email prior to submitting the form.



### Pro tip



Another way to control your form submissions and perform quality control on surveys is to disable your form after you've received a certain number of submissions. Simply go to the **Settings** tab and click the **Form Status** dropdown button. Choose **Disable on Submission Limit** from the dropdown, and then set it to your desired number.

## Securing your account

Finally, to properly secure your forms, it's important to secure your Jotform account as a whole. At this point, most folks have experienced a version of digital security training, courtesy of your company, your school, or another organization. You may be aware that one of the best practices from these training sessions is the idea that you should never share your account credentials or logins (or reuse passwords).

And with good reason.

Shared login credentials can end up in the hands of bad actors; or former employees can continue to access sensitive company (and customer) information well after they've left your organization. Either situation can negatively affect your organization.

Jotform also carries out some proprietary security measures aimed at securing your account. For example, the data within your account is continuously backed up in real time between multiple servers hosted by Google Cloud. That data is also replicated to AWS servers by way of hourly snapshots to ensure data redundancy through diversification.

Jotform is serious about its commitment to industry-leading security protocols. If any issues ever arise in Jotform's online platform or mobile apps, your dedicated customer success team and our 24-7 support professionals will work with you to understand and identify the problem and take the proper steps to rectify the situation.

\*\*\*

In an age when so much information is constantly exchanged, especially for business, forms can seem like a throwback. But online forms help you collect the information you need to get things done without paper, bottlenecks, or manual and error-prone data entry.

Now that you know how to build and distribute secure online forms, access your submission data, as well as how to use forms to facilitate communication, there's no limit to what you can accomplish.

## Chapter 11

# Turn your forms into workflows

In a perfect world, the data you collect should kick-start project work: scheduling a meeting, initiating a call, assigning a new task, and more. But using paper-based processes to collect data results in unsustainable and inefficient workflows, which means your employees will spend more time on busywork than on mission-critical work.

An operational sales director in the UK understood that as his organization grew, its dependence on verbal agreements (for customer credits) and paper was no longer viable. These old ways of conducting business were making it next to impossible to track data and costing the company money.

Now, his submission data triggers automated reporting and approvals from Jotform, so he doesn't have to waste time confirming who promised what or sorting through physical paperwork. Since all of his data is in one place, it's trackable and much easier to use.

"Jotform's workflows are really useful. Salespeople didn't see the financial impact of customer credits before. Now approvals have the requestor's name attached, and people are more thoughtful about what they submit."

— Tony Richman, **ACS Stainless Steel Fixings Ltd.**

Knowing how to make the most of your form submission data, like our sales director friend, will pay you back in spades. But making the most of your data depends on how you want to use it.

So when your submission data needs to kick off a sales call, report creation, or a different but key workflow step, Jotform Enterprise will accommodate you.

## Jotform Workflows features

Approvals, email notifications, and reports aren't the only features that help Jotform Enterprise customers create efficient workflows.

Jotform Workflows straddles the line between business process management and traditional workflow management to help you automate entire processes.

### Integrations

You can now drag and drop third-party integrations directly into your workflows, allowing your organization to integrate relevant apps from your tech stack in a native way.

Whether your form submissions trigger...

- Task creation/management with Asana or monday.com
- File sends to Google Drive, Dropbox, or OneDrive
- New meetings with Google Calendar
- Message sends to Slack and Microsoft Teams

...your team will spend less time on manual work and be freed up to work on what really matters to your business.

### White labeling

We know how important it is to ensure your customers' trust and loyalty as they engage with your workflows. We've made it easy for you to customize each step of your workflow with your logo and other brand elements, creating a more professional experience for you and your users.

### Native workflow payment collection

The new Payment Form element lets your organization easily request payments directly within your workflow, eliminating the need for a workaround. From nonprofits to finance teams and every organizational use case in between, integrating payment collection within your workflow will simplify your financial processes and save you valuable time.

## Tying approvals to your form submissions workflow

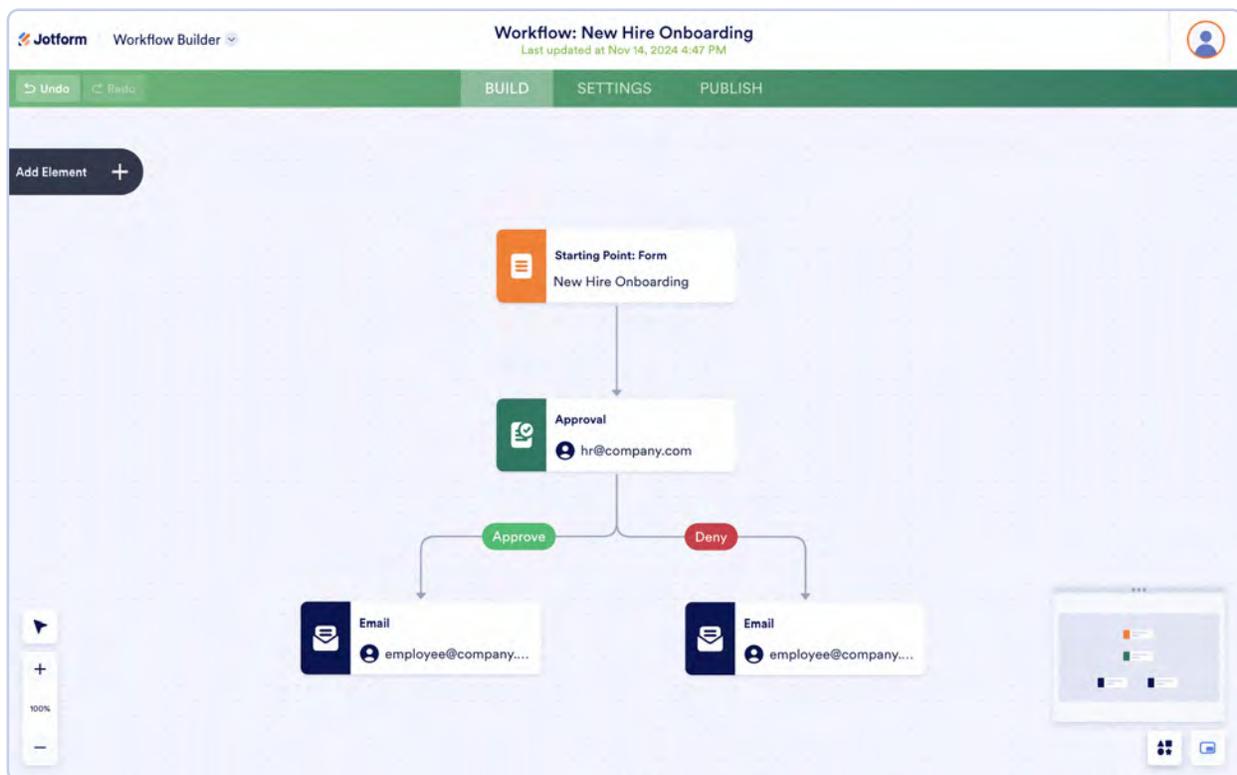
Regardless of how you plan to use your submission data, everything begins with a form.

Once a user fills out your form, it can kick off an approval flow, one of the most helpful organizational features for workflows and sign-offs.

When your approval flow begins, you can approve, deny, or have the user fill out another form. For example, take a job application where the applicant makes it past the first round of approvals from the HR manager. Now the hiring manager wants the applicant to complete an assessment to show their skill level. You can add a branch for the next step in your workflow.

Some of the most common approval flows are

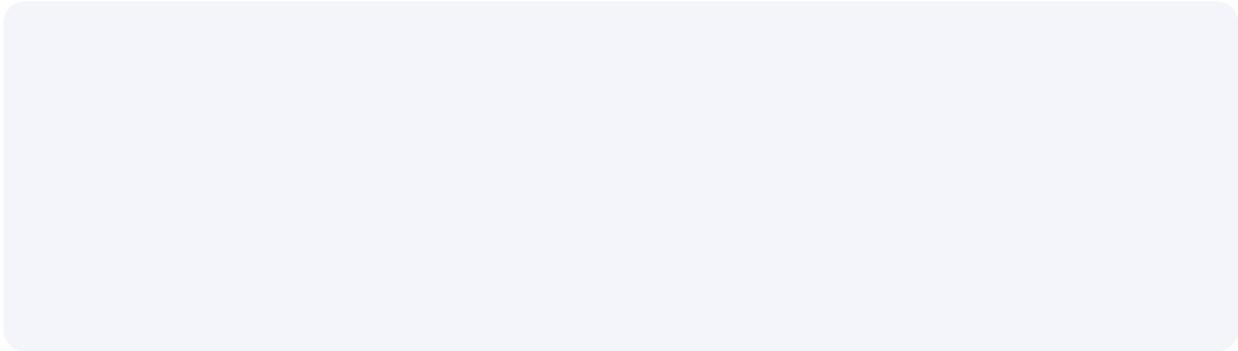
- Job applications
- Time-off requests
- Membership applications
- Purchase (or expense) requests
- Grant applications



Another Jotform Enterprise user, a senior manager of information systems, uses approvals to automate new project proposals. The park district he works for serves 12.5 million visitors annually.

Prior to Jotform, his group employed multiple software products in their tech stack, but the system broke down because their forms were cumbersome — and they needed good cell reception to get fieldwork done.

Now, the park district uses the approval workflow feature of Jotform Enterprise to enable employees to submit capital project proposals to fund (such as new picnic shelters). The automation funnels the request through the appropriate checkpoints to reduce turnaround times.

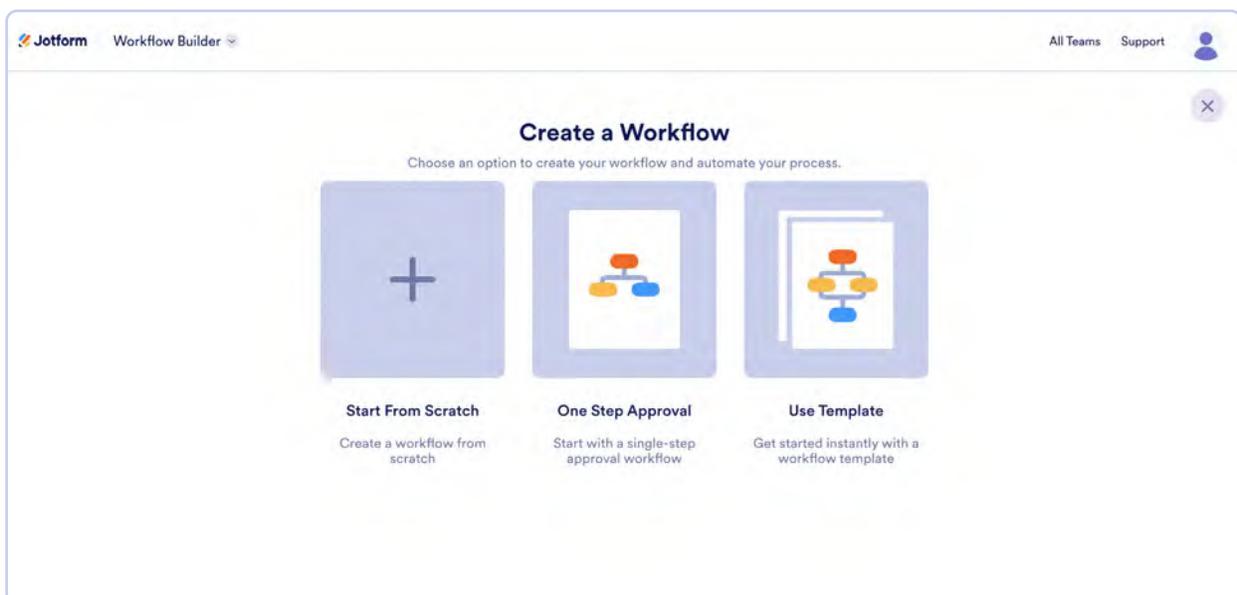


Let's take a look at the customization options available in Jotform Workflows.

## Building the approval

Business needs vary, and as a result you'll want to customize your workflow to meet your organization's needs.

There are a couple of different ways to build your approval flow to suit your unique needs.

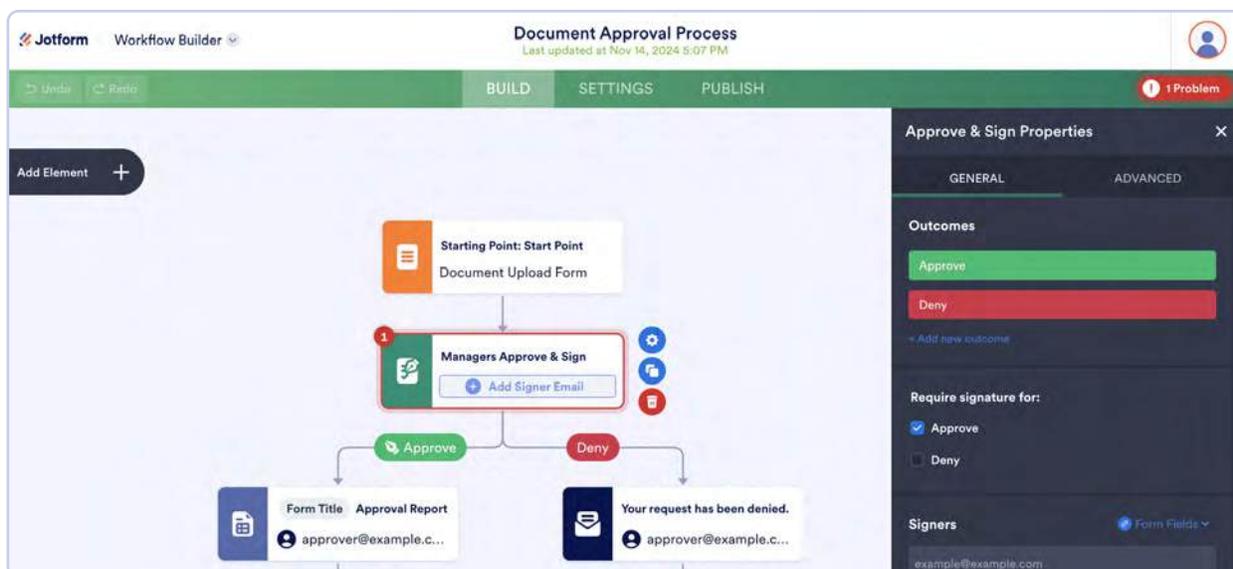


## From scratch

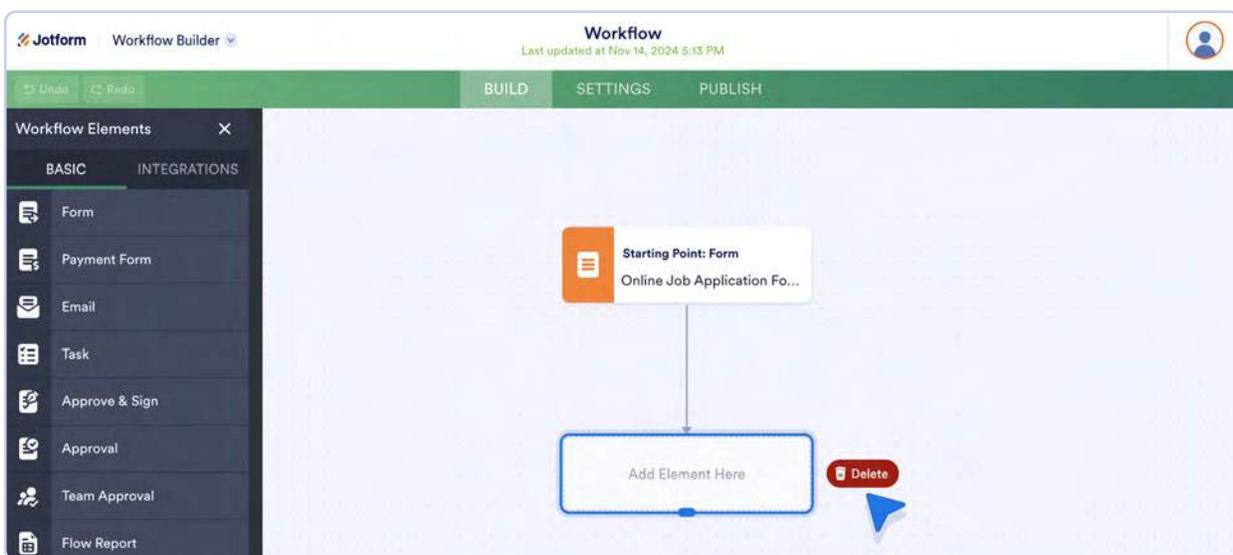
If you selected **Start From Scratch**, congrats! The possibilities for your workflow are endless.

The first thing you'll be asked to do is pick a form to base your approval flow on. Make sure your form asks for your submitter's contact details, so they can be notified when their submission goes to the next step in the approval process. From there, you can add your choice of elements to customize your workflow.

When you hover over an element, click the dot on the right side of the element box to add another branch to the approval flow. You can add different elements simply by dragging and dropping from the left menu. But don't forget to make sure your steps are connected. Otherwise, you'll see an error note in the upper right of the screen detailing how/why the approval flow doesn't work.



If you want to delete an element, just click the trash can icon to the right of the element.

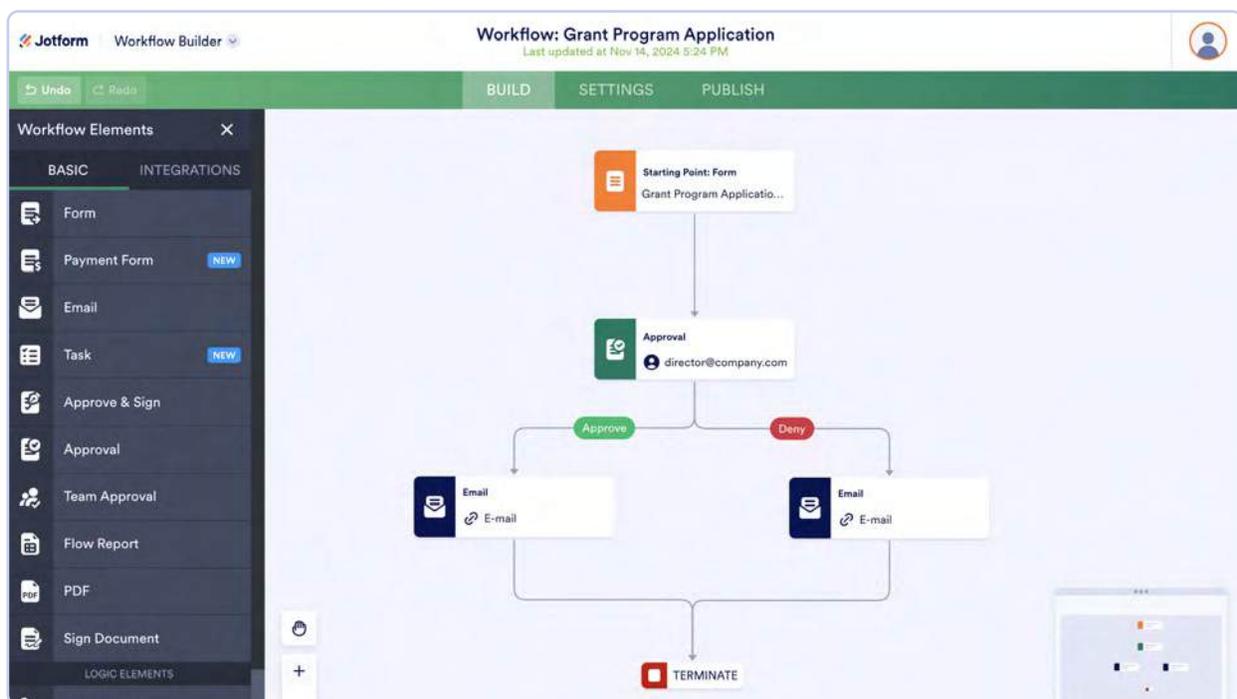


## One-step

If your workflow needs to escalate to only one person for approval, a one-step approval is probably the right choice for you. In the one-step approval flow, the request will go to one person, who can approve or deny the request, and the approval or denial email will then be sent to the submitter. It's quick, easy, and will get the job done efficiently.

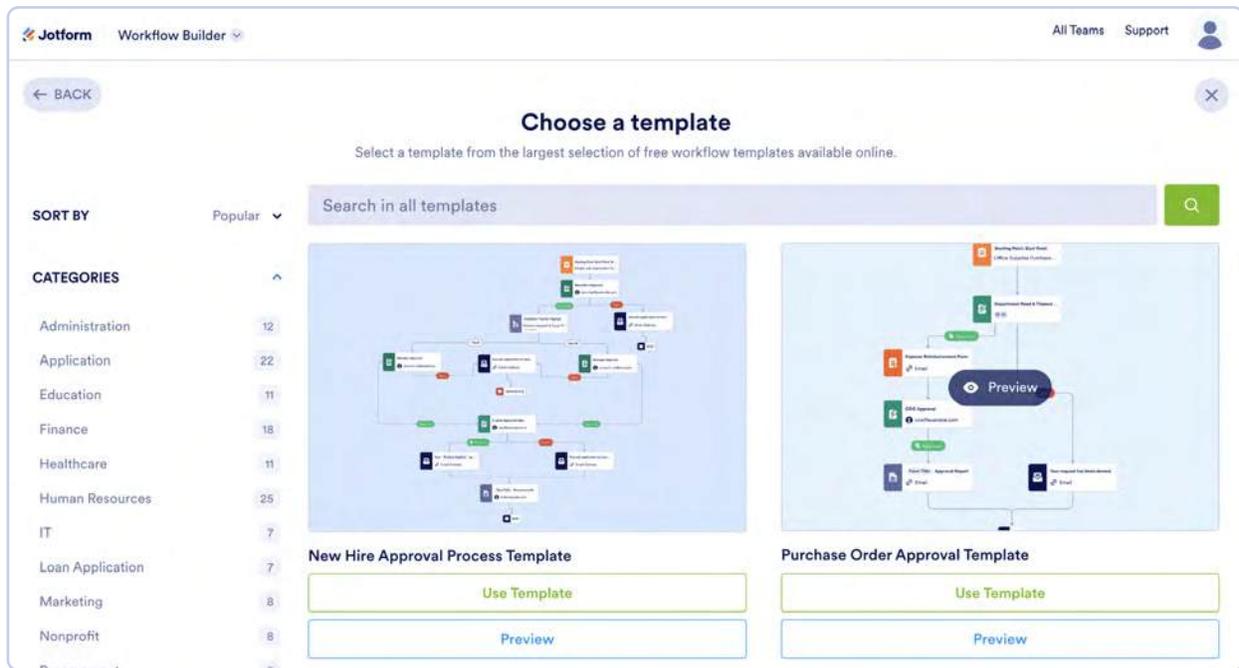
When you create the one-step workflow, only the basic approval branches that you need will appear. However, if your workflow grows beyond one step, you have the flexibility to add branches and conditions.

One thing to keep in mind is that you'll have to select a form for your approval flow, so make sure you use a form that collects all the relevant contact information from your submitters.



## Use Template

If you have a good idea what kind of workflow you need, your best option may be to begin with a customizable template. Jotform has more than 100 workflow templates covering use cases across industries (like nonprofit, education, healthcare, and HR) as well as task (such as project management and requisitions).



Starting with a template is simple. Just find the one you want, click the **Use Template** button, and you're good to go.

Especially for more complex workflows, templates can give you a better idea of the steps, tasks, and workflow structure that can make your process more efficient. And you can swap out or eliminate any elements or flows you don't need.

## Basic Elements

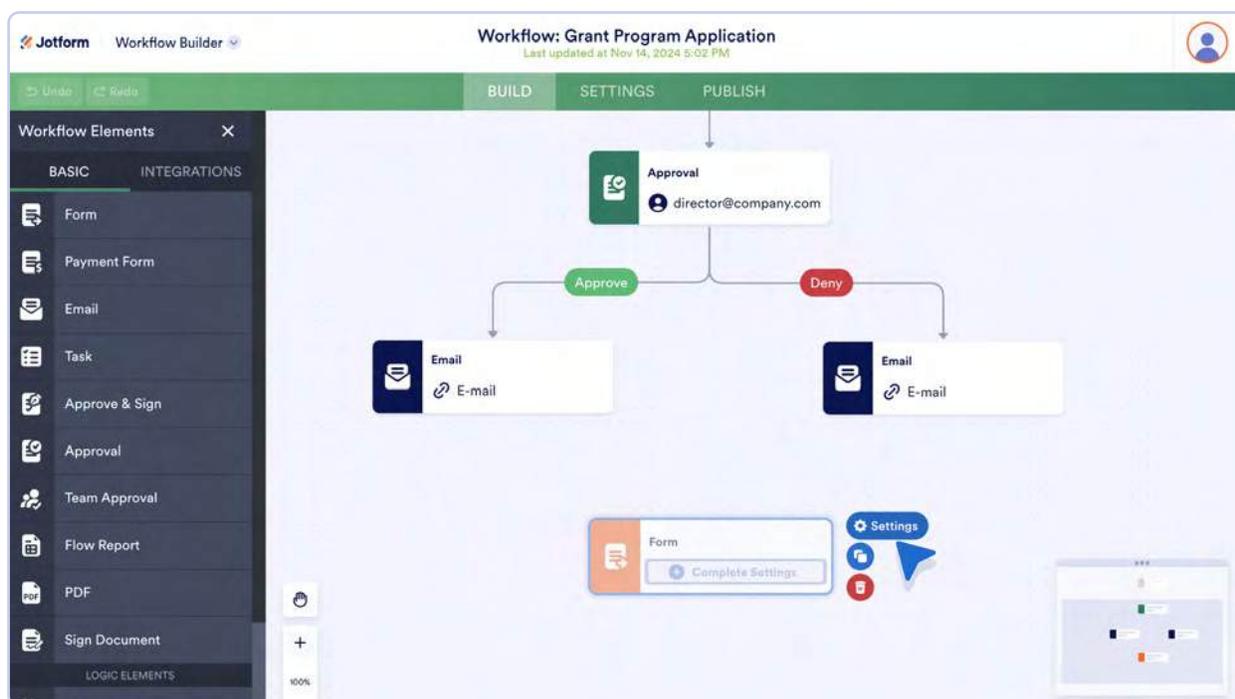
The list of Workflow Elements contains basic and integration elements, but let's explore the basics first.



## Form

The **Form** element in Workflows kicks off the entire approval, task, or signature process and can trigger many actions within the workflow. For example, if the HR manager wants to automate interview scheduling after an applicant fills out the application, they can add a Form element to the approval to automatically send the candidate a subsequent form once the initial job application is approved.

The Form element has some settings you can adjust to fit your business needs as well. If you click the gear icon to the right of the element, you'll be able to select the form you want to use, automatically assign the form, use prefill to speed up the form filling process, and customize notifications, such as how often you want to send reminder emails.

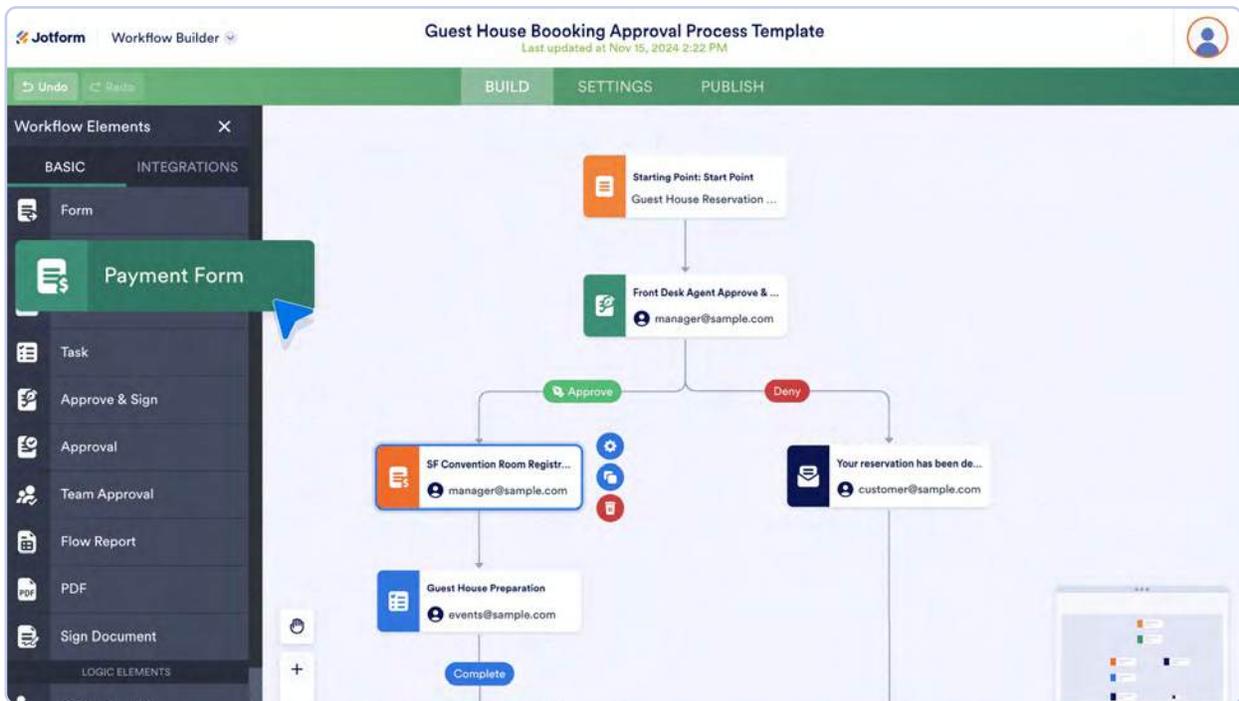


## Payment Form

The new **Payment Form** element makes it easier for your organization to collect money.

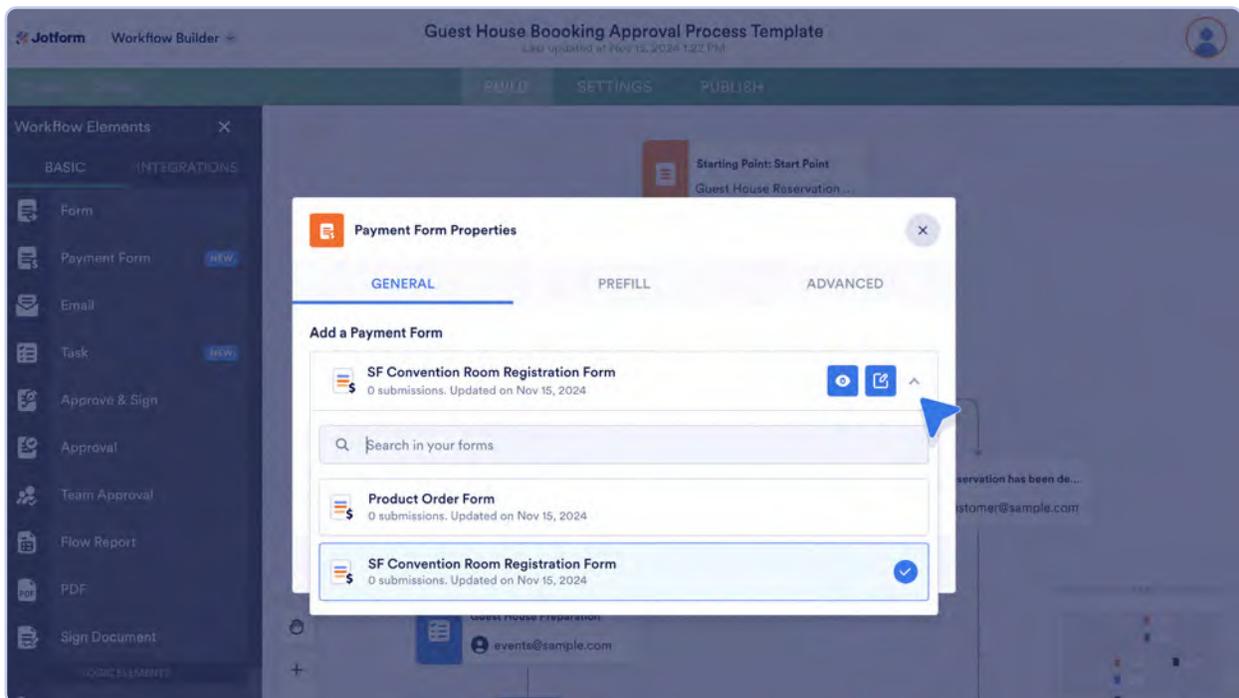
If your organization needs to take payments at scale, add a follow-up payment form to your workflow. This will save you a ton of time while streamlining this important step.

One use case might be to collect deposits for guest house and/or apartment bookings. You can set up your payment form to collect a deposit after the booking is approved.



Click the gear icon next to the Payment Form element to access the following options:

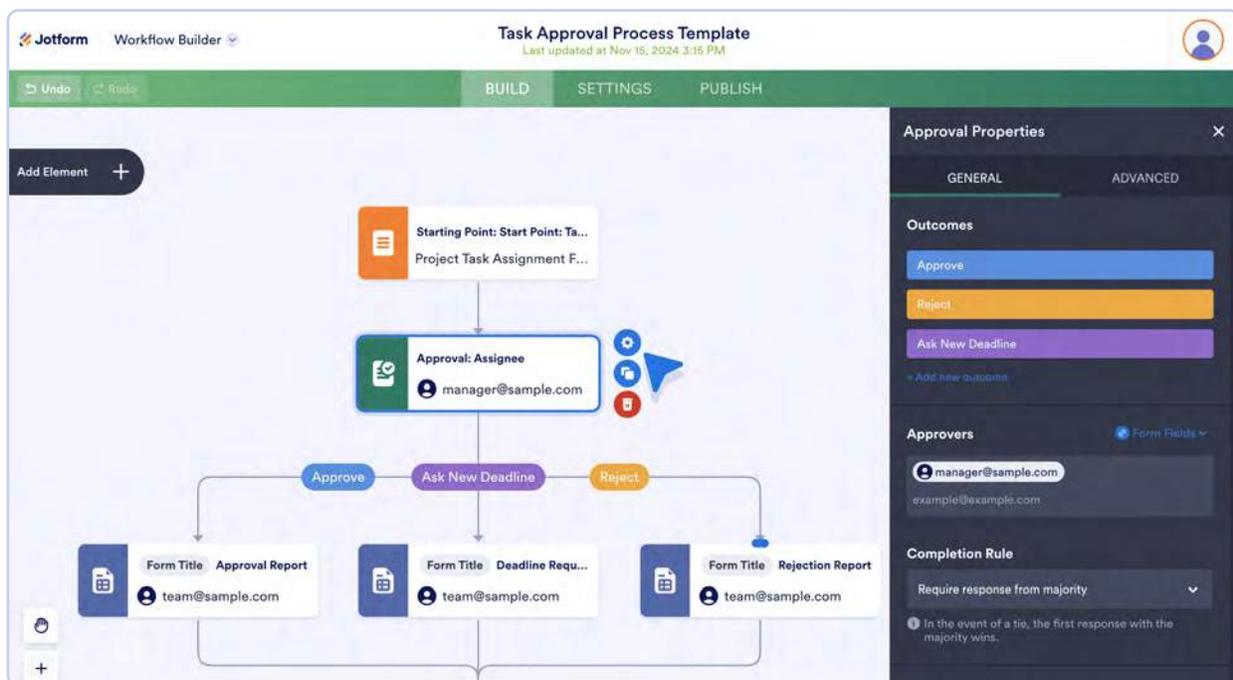
- Select which payment form you'd like to include in your workflow
- Prefill the payment form to help expedite form submission
- Send notification and reminder emails to nudge respondents along if they have yet to complete payment



## Approval

The Approval element is a fundamental piece of Workflows. This element allows the approval owner to assign tasks to others for approval and keeps the workflow moving.

Within the **Approval Properties**, you have the option to assign approvals to one or more people, change outcomes, customize the approval request email, and send reminder emails to approvers. You can also give your approvers the option to reassign the approval to someone else or ask for more information.



Additionally, you can control whether or not your approver has to log into Jotform to submit their approval. In the **Advanced Approval Properties** tab, you have the power to automate escalations and set an expiration date for the task to expire.

For example, when someone fills out a job application, an HR manager receives the application and needs to approve it. Of course, the HR manager isn't usually the only person making the hiring decision. They also need approval from the hiring manager and/or other stakeholders. Keep in mind that this is the approval process in its simplest form, and when projects need to get escalated, there are usually a lot of moving pieces in play.



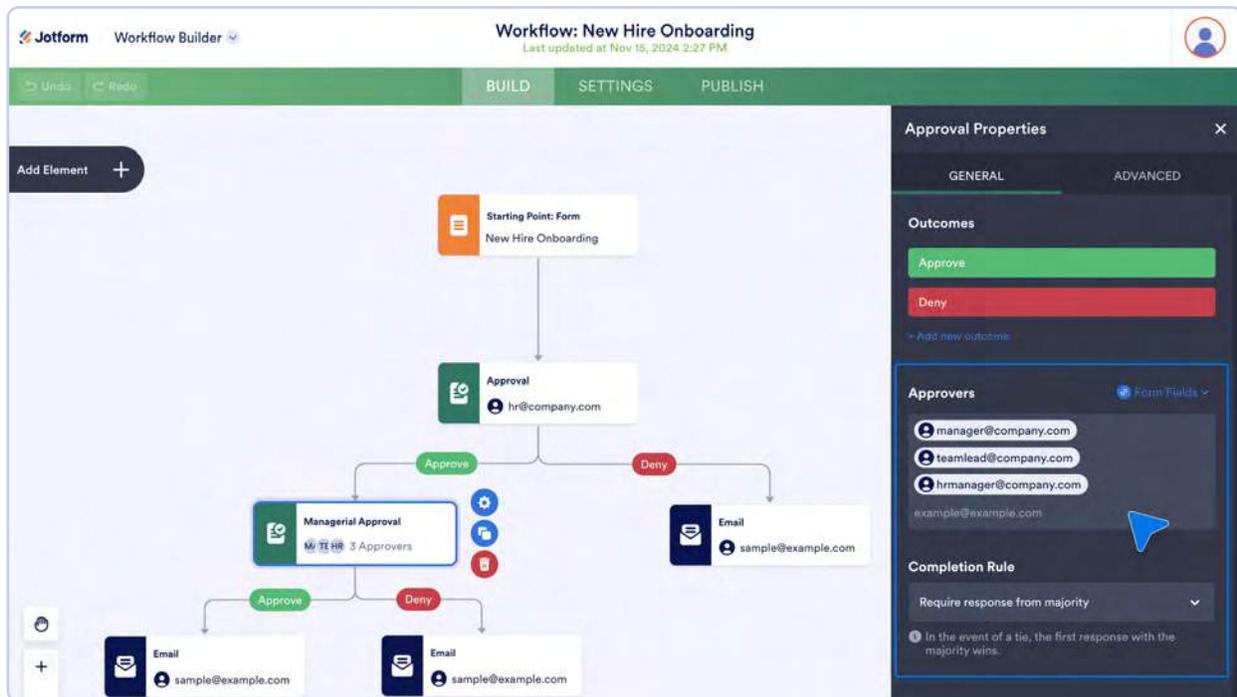
## Group Approvals

We've made it easy and efficient to collect approvals from a large group of stakeholders. You can send an approval to a group of your choice by adding their associated emails, and you can have an unlimited number of approvers!

Group Approvals allow you to

- Request approval from people in different departments or a specified team by adding your approvers' emails to a single element
- Tailor how many individuals need to weigh in to complete your workflow

When you're building your approval workflow, add an Approval Element and type in your approvers' emails in the **Approvers** field under Approval Properties. If you want to pull approver emails directly from your form, click the **Form Fields** dropdown to add a field. Select a completion rule to direct how your group approval will work.



Let's break down the completion rules because you have a few options to choose from:

- **Require response from one person.** A response from one person will move the flow forward based on their answer (approve or deny).
- **Require response from majority.** This means the workflow will proceed based on the majority response. In this workflow, the majority is two-thirds of the responders. If there's a tie, the tie-breaker will be the first response that makes a majority. So if you have one denier and one approver, and the next person to answer selects deny, the approval would be denied.
- **Require response from all.** All approvers must answer before the flow can move forward. In the event of a tie, the first outcome to reach a majority of responses will win.
- **Require certain number of responses.** The workflow will only move forward when a predetermined number of people respond. The first response with a majority will win.

Once you've added your approvers and selected a completion rule, go to the **Advanced** tab to set permissions or requirements for your approvers.

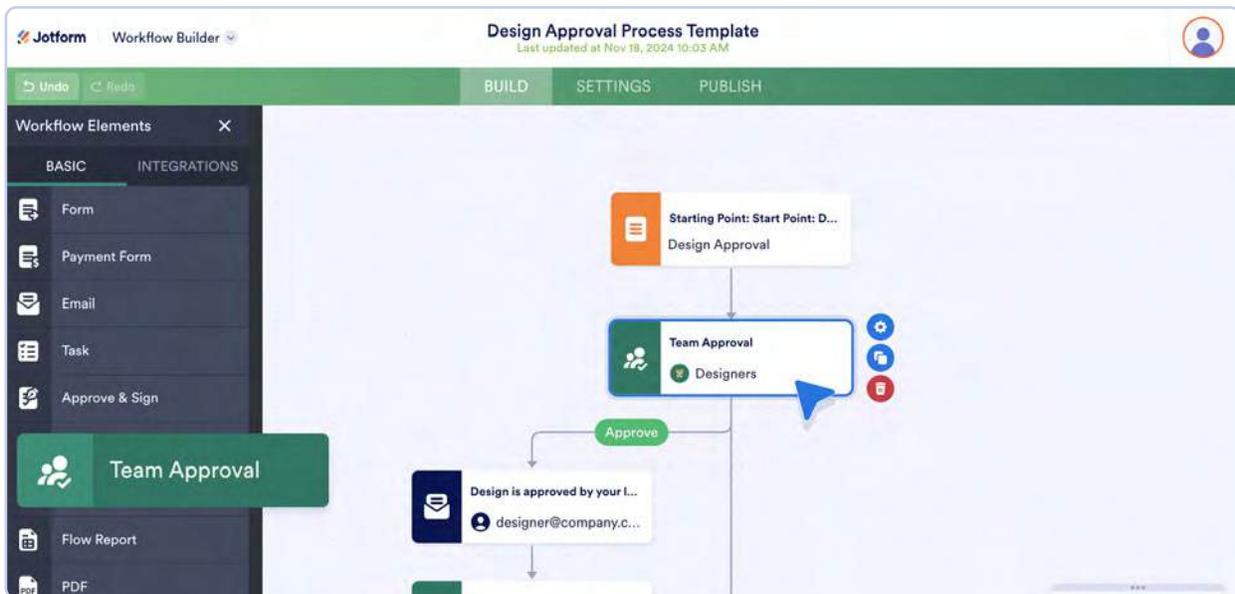
### Pro tip



You can prevent approver bottlenecks when using Group Approvals by using the Take Over feature, which allows the workflow owner to act on behalf of others and make sure the process moves along.

## Team Approvals

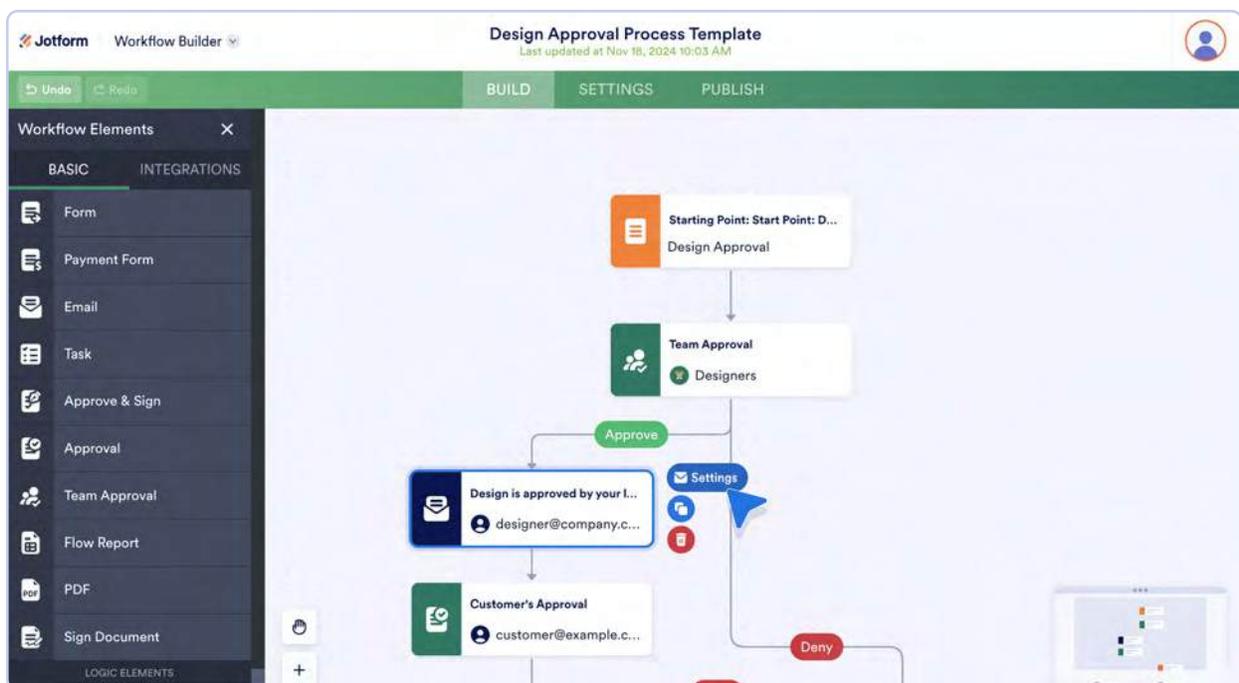
For even more efficiency, Enterprise users can take advantage of the **Team Approval** element, which lets you save time by selecting an entire team for an approval, instead of individually adding people to an Approval element. Team Approvals are dynamic, which means that if someone new joins a team, they will automatically receive an approval request. Similarly, if they leave a team, they will no longer get the approval request.



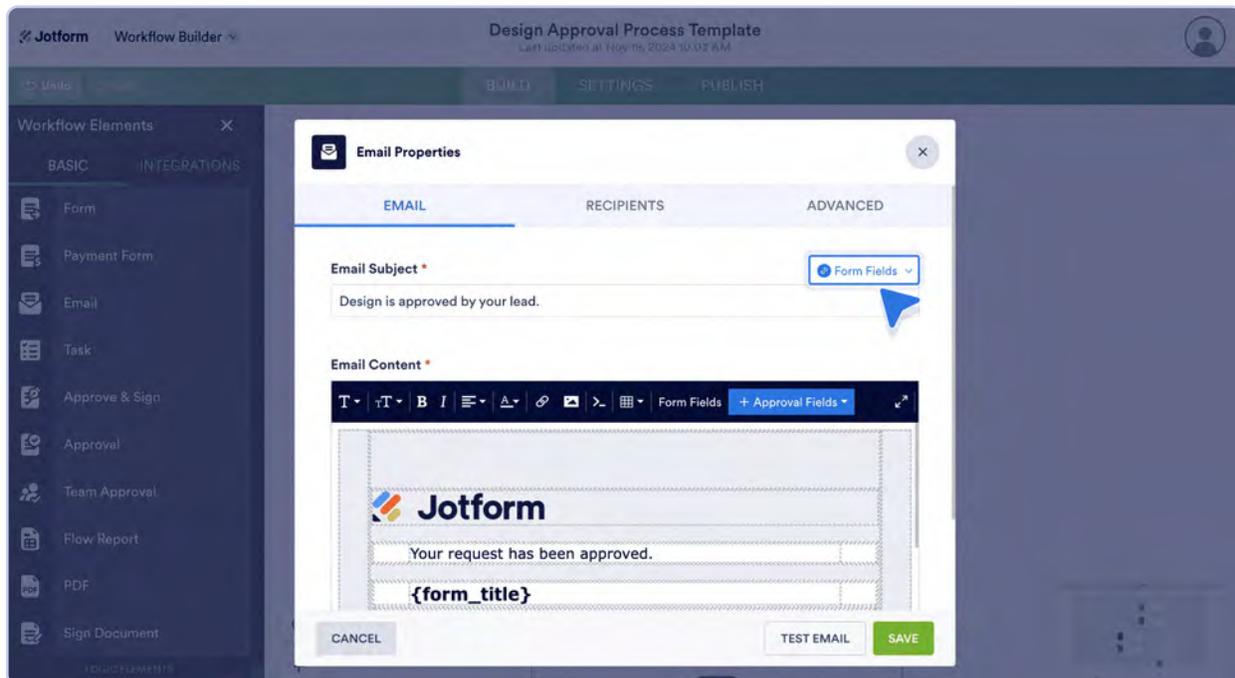
## Email

The HR manager in our example can add an **Email** element so that once the candidate has completed their assessment, the hiring manager will get an automated message letting them know the candidate has completed the assessment and can move on to the next step. The Email element can also be used to let the form submitter know that their application has progressed in the process.

If you want to further customize your submission email, you can do so in the **Settings** menu. Just click the envelope icon next to the Email element to open it.



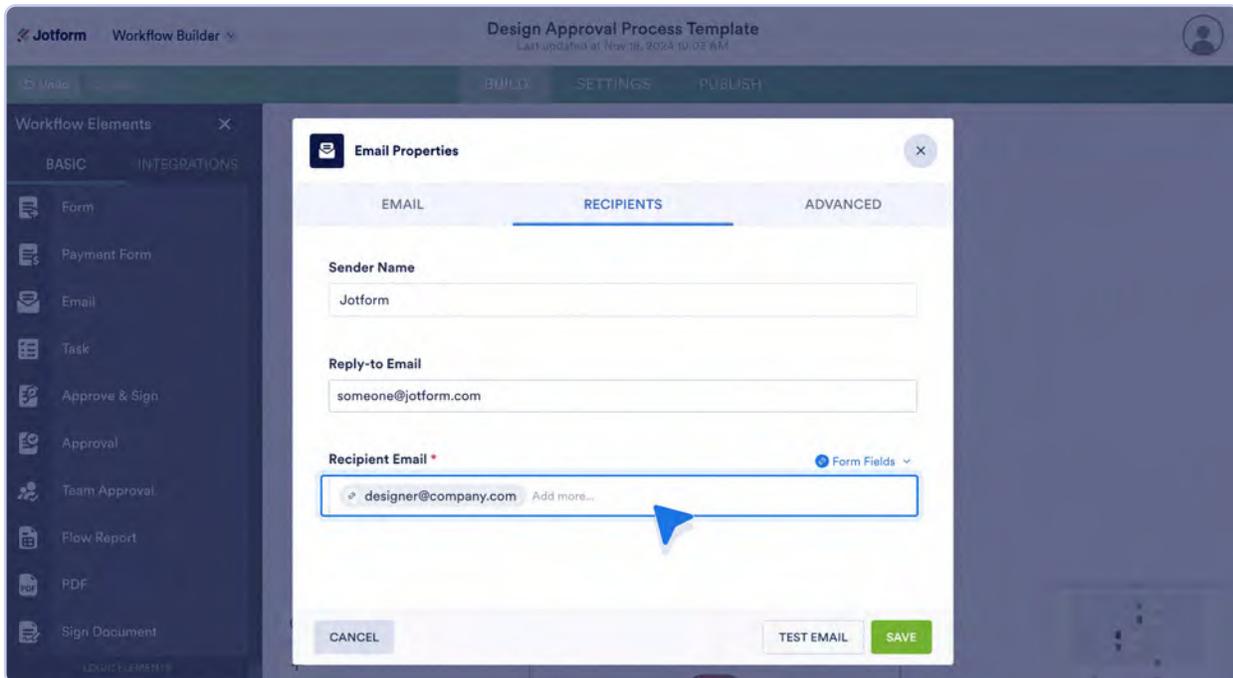
Within the settings, you can indicate which form fields to include in the email and customize your subject line. Just click the **Form Fields** dropdown in the **Email Content** toolbar.



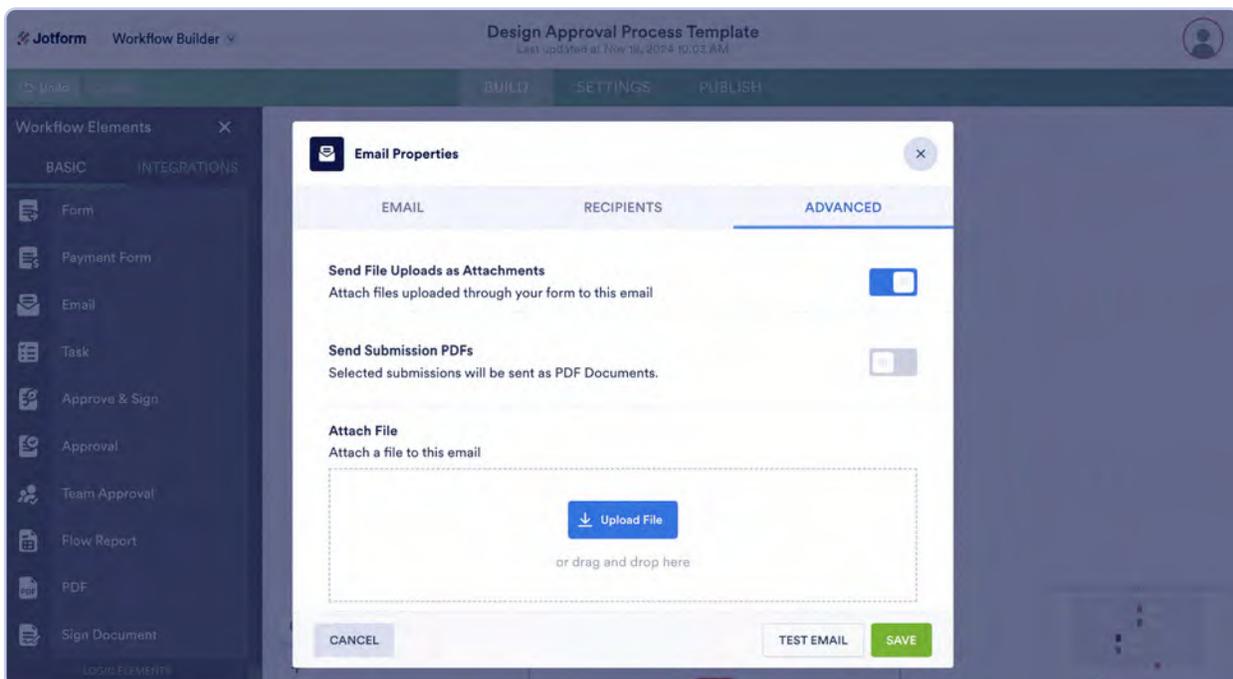
Go to the **Recipients** tab to personalize the name of your sender, the reply-to email, and of course, add your recipients. You can pull a list of recipients directly from your form, as long as an email field is included in the form. You can also send a test email to ensure the email is free of errors and everything looks OK. Be sure to click **Save** when you're done.

In our hiring scenario, the Email element will notify the applicant that their application has moved to the next step. It will also let the hiring manager know that they need to schedule an interview with the candidate.

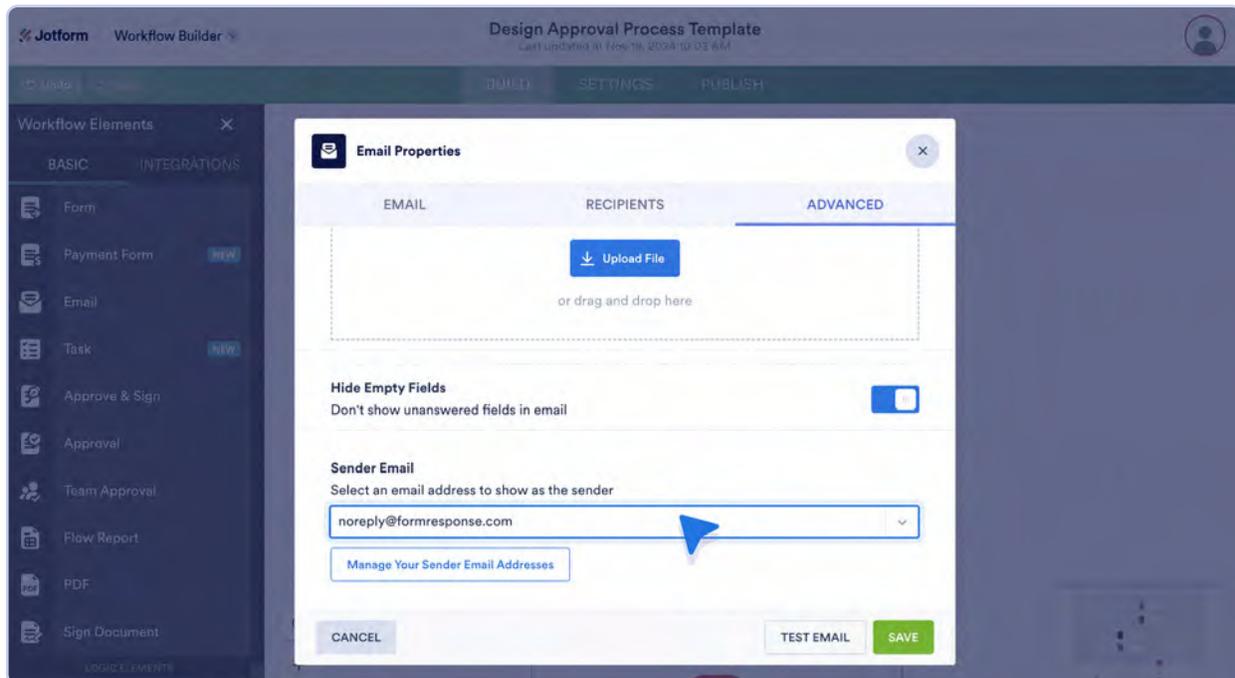
Another great thing about the Email element is that you can use it to notify colleagues or people who aren't part of the workflow. Let's say the CEO wants to be notified about potential new hires. The email function can be set up to notify the CEO when a candidate interviews with the hiring manager.



Go to the **Advanced Settings** tab to send a PDF to submitters upon form completion and/or attach any files that might be relevant.



You can also hide any unanswered form fields in the email. And you can customize which address you want to send your confirmation email from by using your own server.



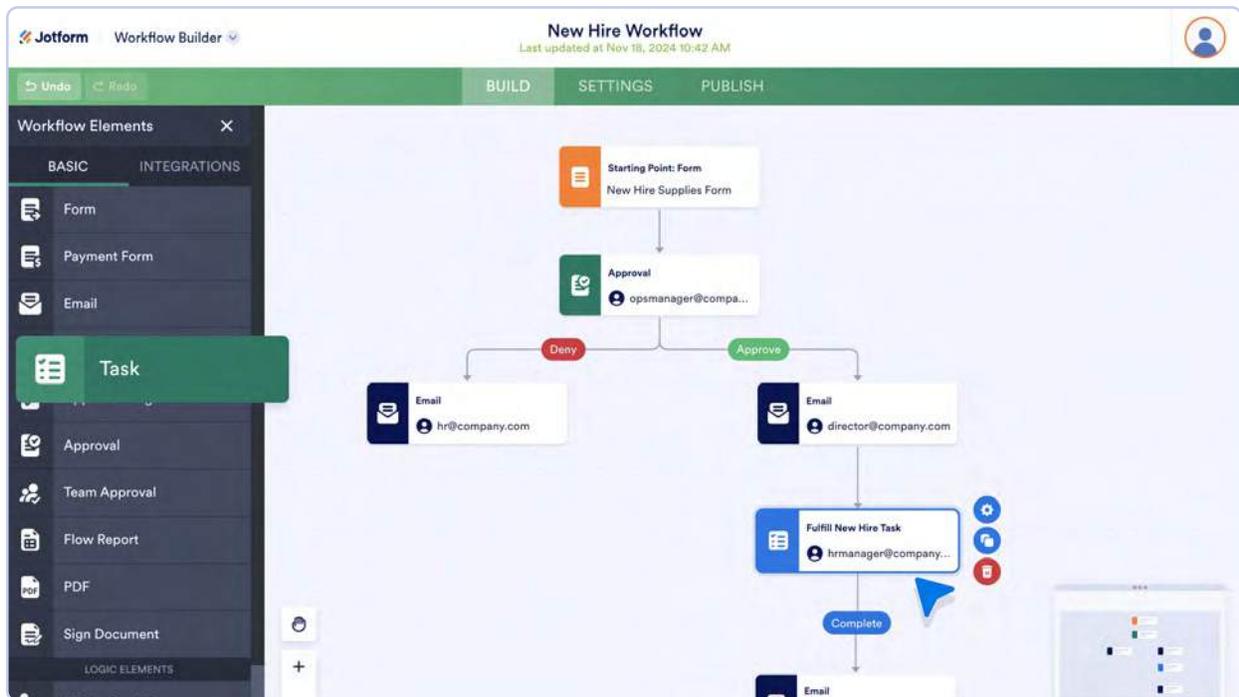
### Pro tip



Click the **Manage Your Sender Email Addresses** button within the Advanced properties of the element, and you'll be taken to your Admin Settings where you can configure a new Sender Email (SMTP).

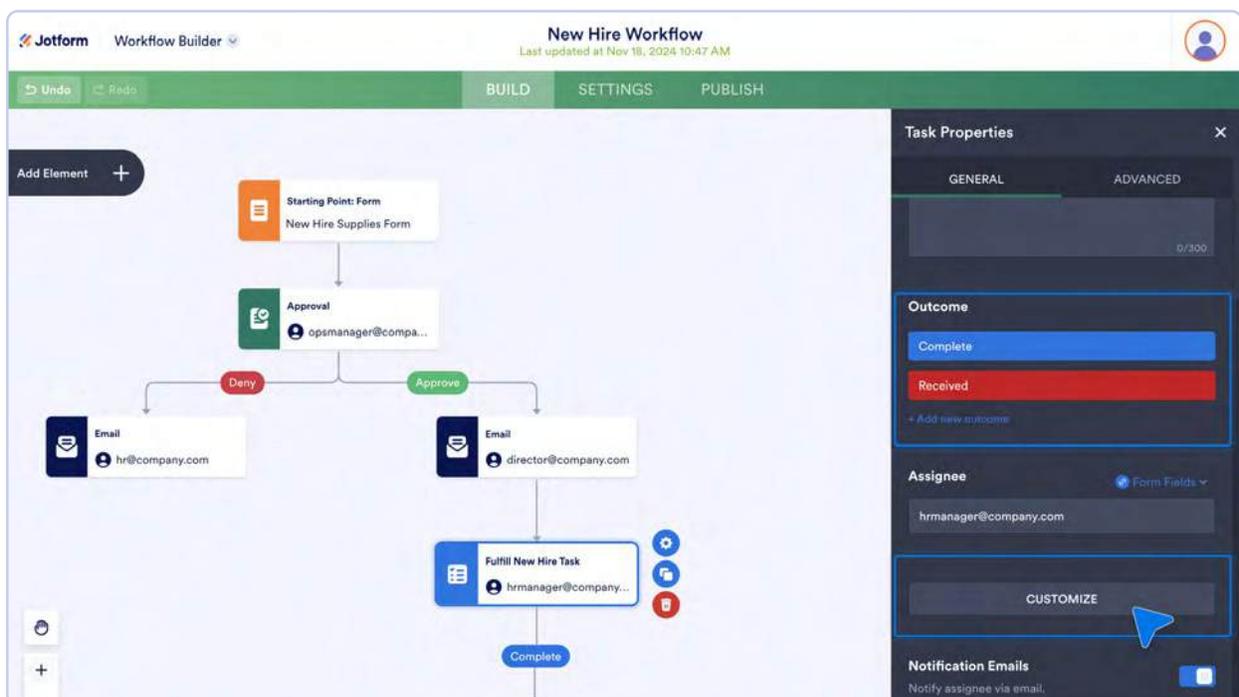
## Task

In a more complex workflow, having a way to automate next steps and tasks for a project really helps keep things moving. The Task element enables you to assign manual tasks as part of your automations, helping you combine technology, people, and business processes in the same workflow.

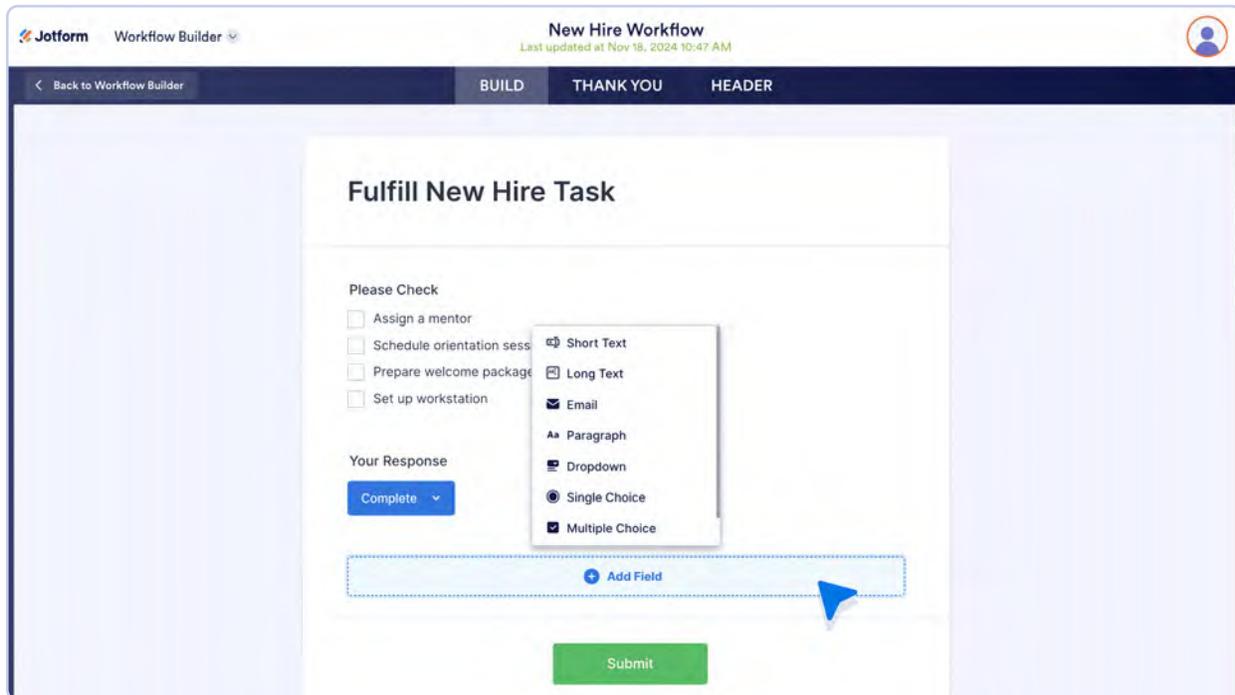


Open the Task element Settings to name and describe your task. You can also edit or add to your task outcomes.

If your task needs to be completed by an assignee outside your Jotform instance, you can toggle the button so login to Jotform isn't required.



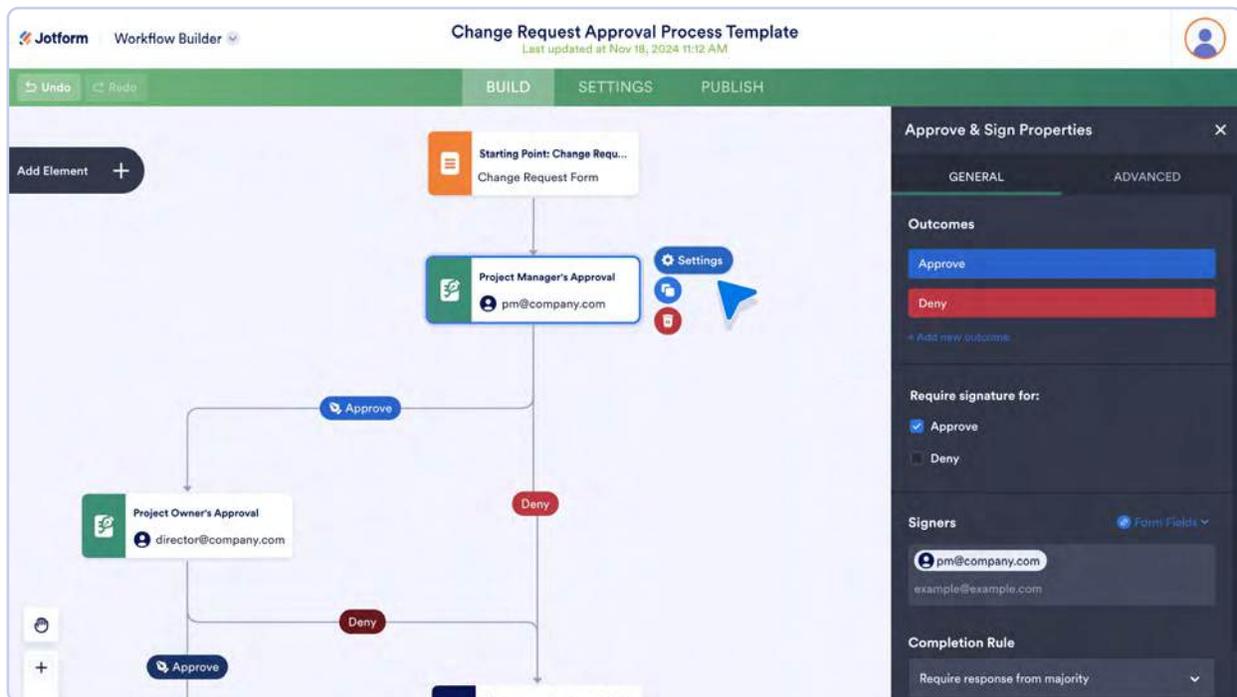
Upon clicking the Customize button, you'll have the option to use a number of elements to create the completion rules or text related to your task. You can also upload any documentation related to the task.



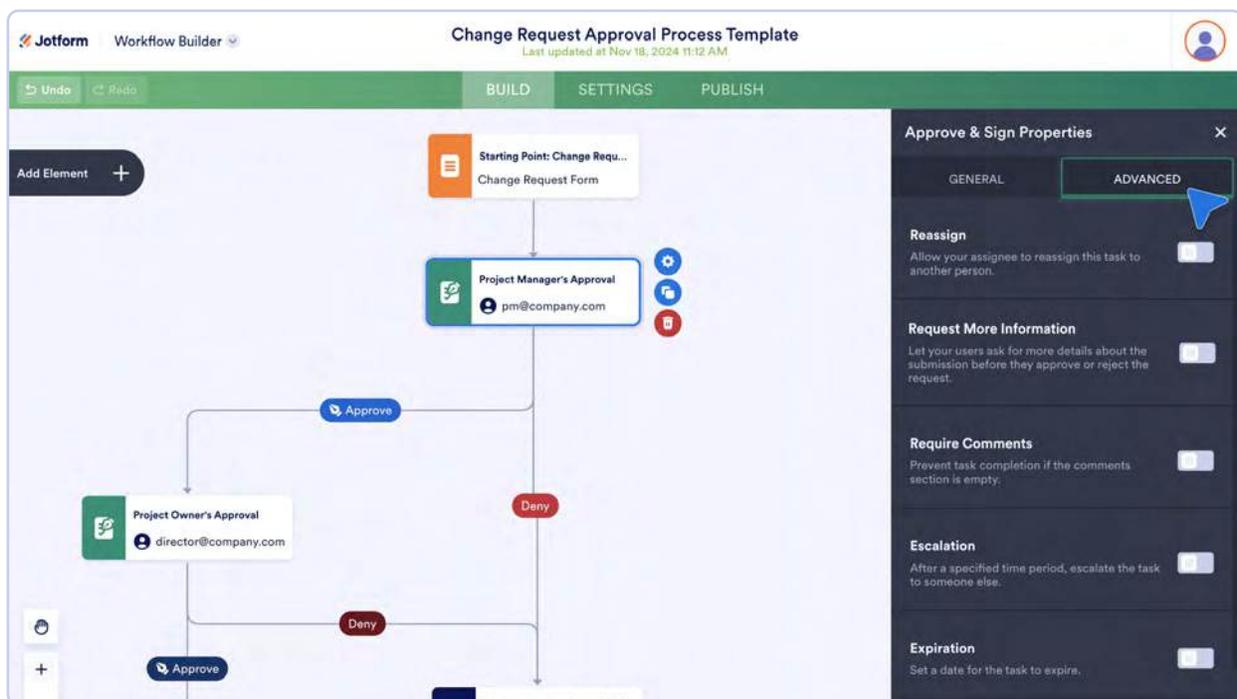
## Approve & Sign

The **Approve & Sign** element is handy when you need your stakeholders to sign off on something.

In the **Settings** tab, you can customize the element based on your organizational needs. For instance, you can require a signature, require signers to log in, and automatically send a signer request email.



In the Advanced Settings tab, you can further automate the Approve & Sign element by allowing approvers to reassign the task and request more information, automatically escalating the approval, requiring comments, setting an expiration date (handy for offer letters), and automatically completing the task after a specified time period.



In our management workflow scenario, the project director of the company needs to sign off on a change request. With Jotform Workflows, the project manager will be able to request an approval, along with an e-signature from the project director, and set up automated reminder emails.

## Flow Report

When a candidate is hired, the HR manager will need an audit trail of the documentation and steps that went into the decision to extend an offer. Luckily, all the HR manager has to do is add a **Flow Report** element to the approval flow before they begin accepting applications. The Flow Report automatically generates a PDF report of the audit trail that includes signatures, approval status, and the full workflow process — from application to offer.

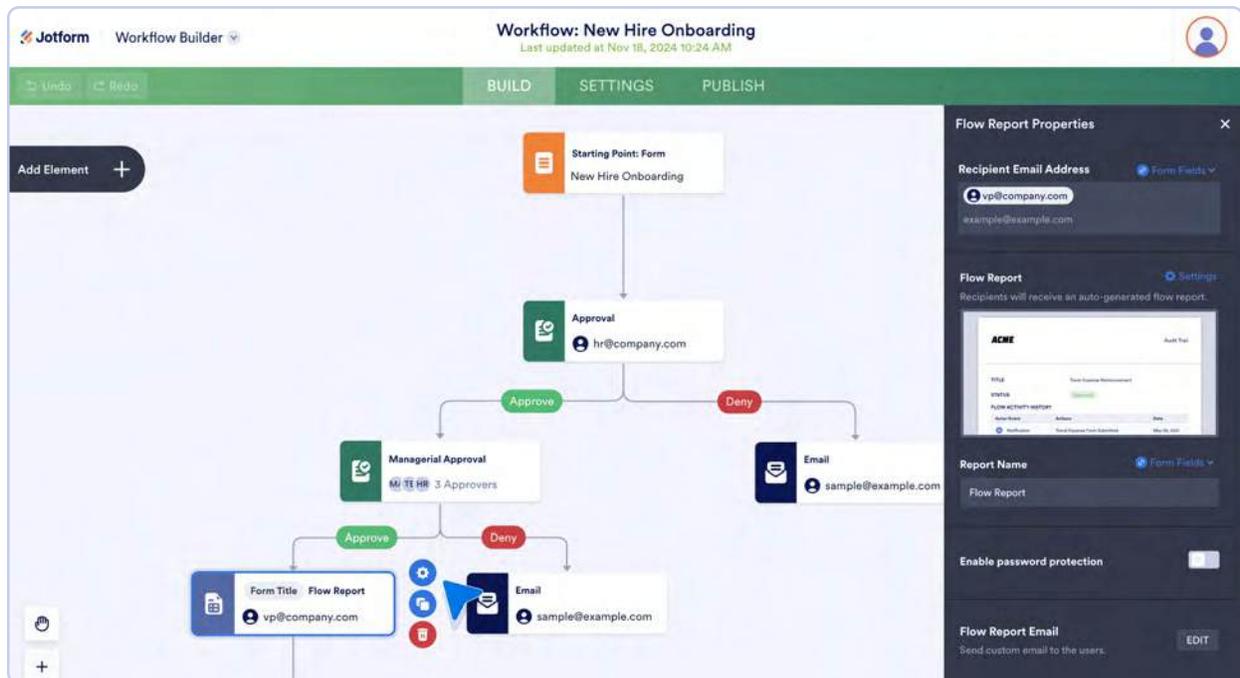
The screenshot displays a Jotform interface with a form titled "Are you Authorized to Work in the United States" and a "Yes" button. Below the form is an "Approval Activity History" section containing two tables. The first table shows an approval action by an HR Manager on November 18, 2024. The second table shows a notification sent to an employee on the same date.

| Actor                        | Actions  | Date                      |
|------------------------------|--|---------------------------|
| HR Manager<br>hr@company.com | <b>Approve</b><br>I think you're a great fit for this position Meghan! | Monday, November 18, 2024 |

Create your own automated PDFs with Jotform PDF Editor - [It's free](#)

| Actor                        | Actions  | Date                      |
|------------------------------|--|---------------------------|
| Notification                 | Email sent. (Your request has been approved.)<br>employeeemeghan@gmail.com | Monday, November 18, 2024 |
| HR Manager<br>hr@company.com | <b>Approve</b>   | Monday, November 18, 2024 |

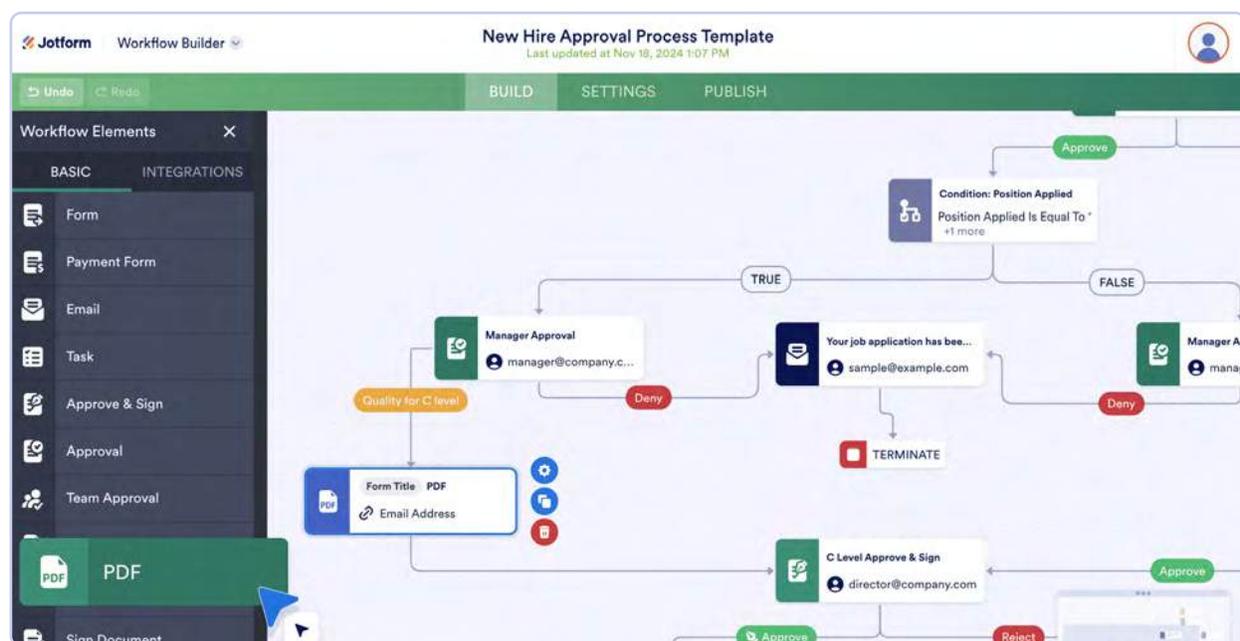
Open the Settings in the Flow Report element to indicate who will receive the report. You can pull emails from your form as long as it includes an email element. You can also rename the report, enable password protection for extra security, adjust the report settings, see an example of the report before you send it, and set up a custom email to accompany the report. In addition, you're able to upload your own PDFs and schedule the sending of the approval email to others.



Jotform Workflows will automatically save your progress, so you won't need to gather documents after the workflow ends.

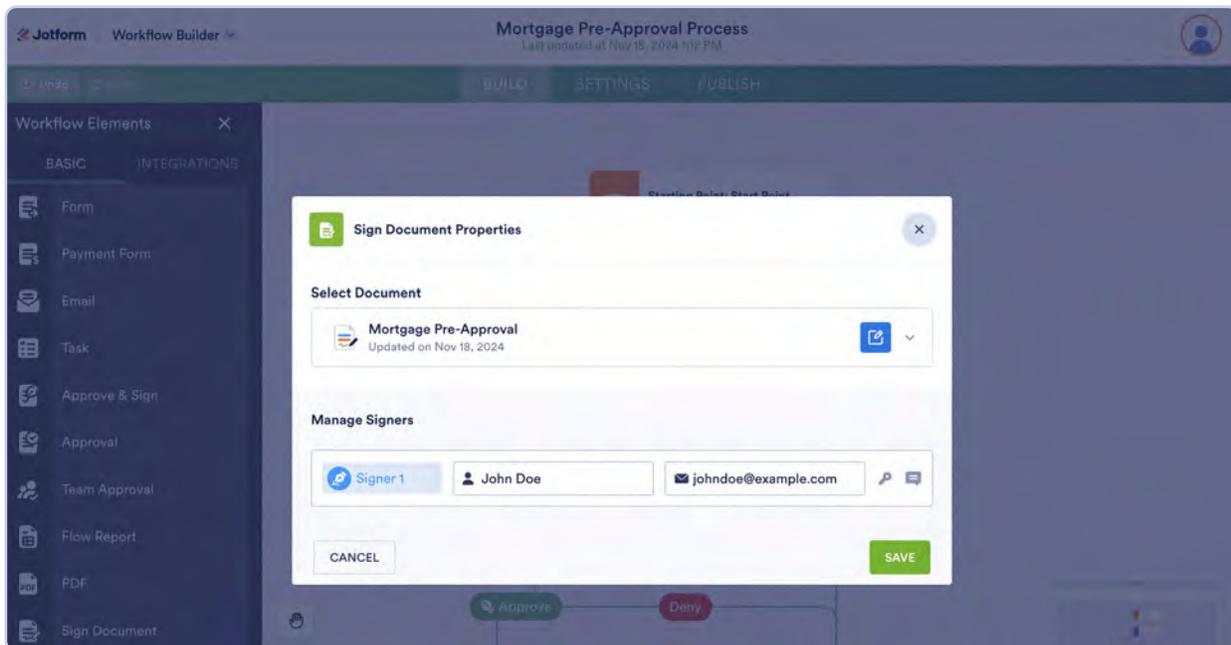
## PDF

The PDF element allows you to send form submissions as PDFs, which is very convenient when a stakeholder has a lot of documents to review. Additionally, you can upload other PDFs to share with stakeholders. So if the hiring manager wants a copy of their candidate's resume and cover letter, the HR manager just has to add a PDF element to the approval flow. All your documentation can stay in one place.



## Sign Document

If you want to include a Jotform Sign document as part of your workflow, you can add the **Sign Document** element to collect signatures from any or all of the parties involved. Just drag and drop the Sign Document element into the relevant spot in the Workflow Builder. From there, you can request e-signatures, designate a signing order, set a security access code for your document, and send a message to your signers. The final signed document will be available as a PDF for download.



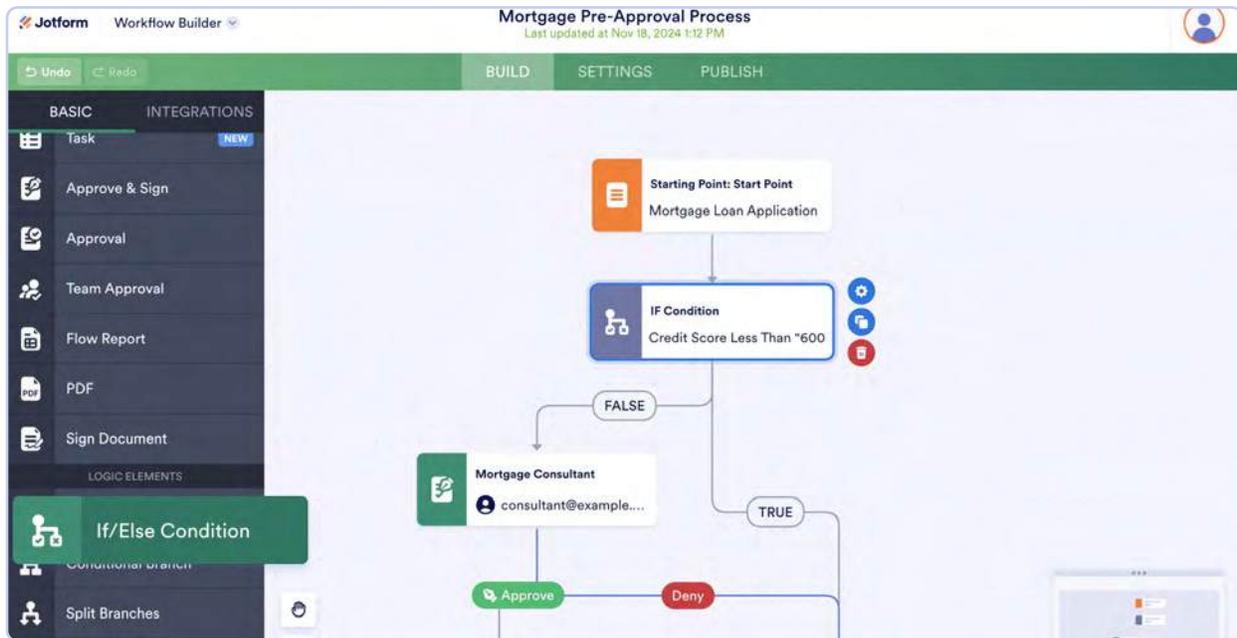
For more information on how Jotform Sign can help your organization, see [Chapter 13](#).

## Logic elements

Logic elements are the building blocks of workflows. They define the conditions specific pathways will follow, controlling the process. If the form submitter meets certain conditions, the workflow will automatically be denied, approved, or directed to other customized outcomes.

In our hiring workflow example, the HR manager wants to automatically deny any job applications that don't include a cover letter. The HR manager can use an If/Else condition to send automatic denial emails to applicants who fail to upload a cover letter. This will save the HR manager from having to manually reject these applicants, giving them more time to focus on qualified candidates.

To set up an If/Else condition in your workflow, just click the **If/Else Condition** element on the left side of the panel and then drag it where you want it to go in your workflow. Open the Settings or click **+Add conditions** to set the conditions. Fill in the answers that will redirect your workflow.



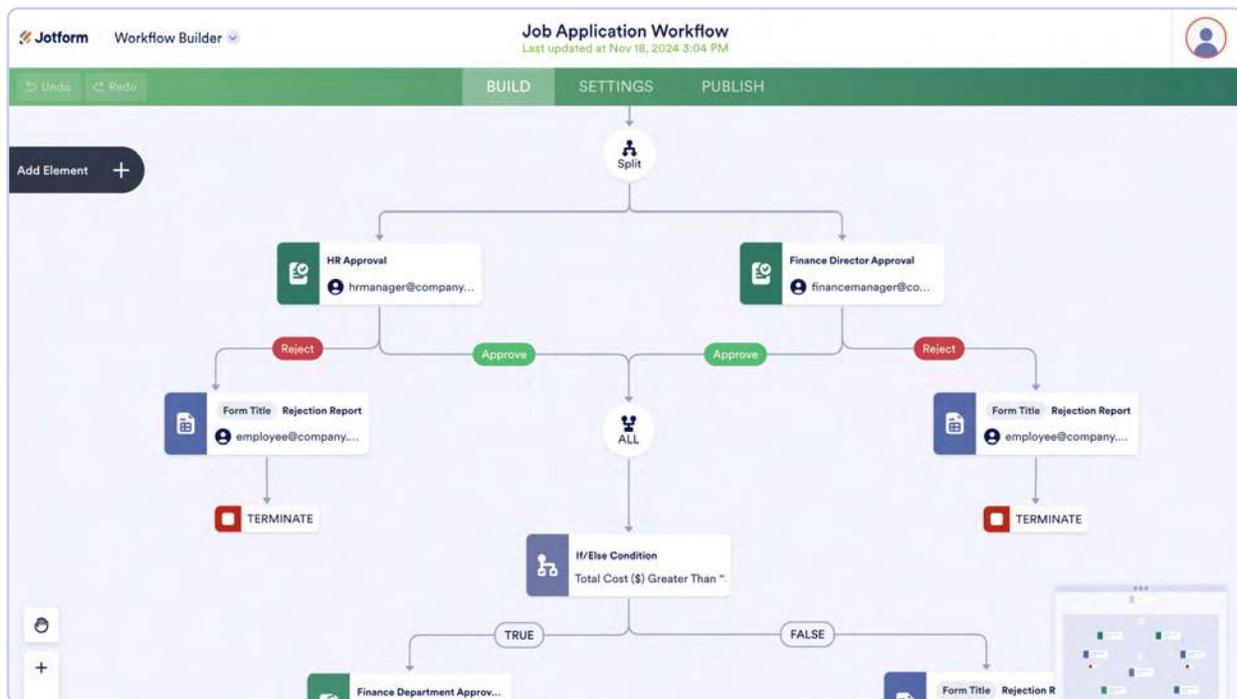
## Conditional Branch

To further customize workflows that require multiple scenarios, you can add a conditional branch to redirect the workflow depending on the form submitter's answers. To set up a Conditional Branch, add the **Conditional Branch** element to your approval flow, then simply click the gear icon and add the conditions to redirect the workflow.

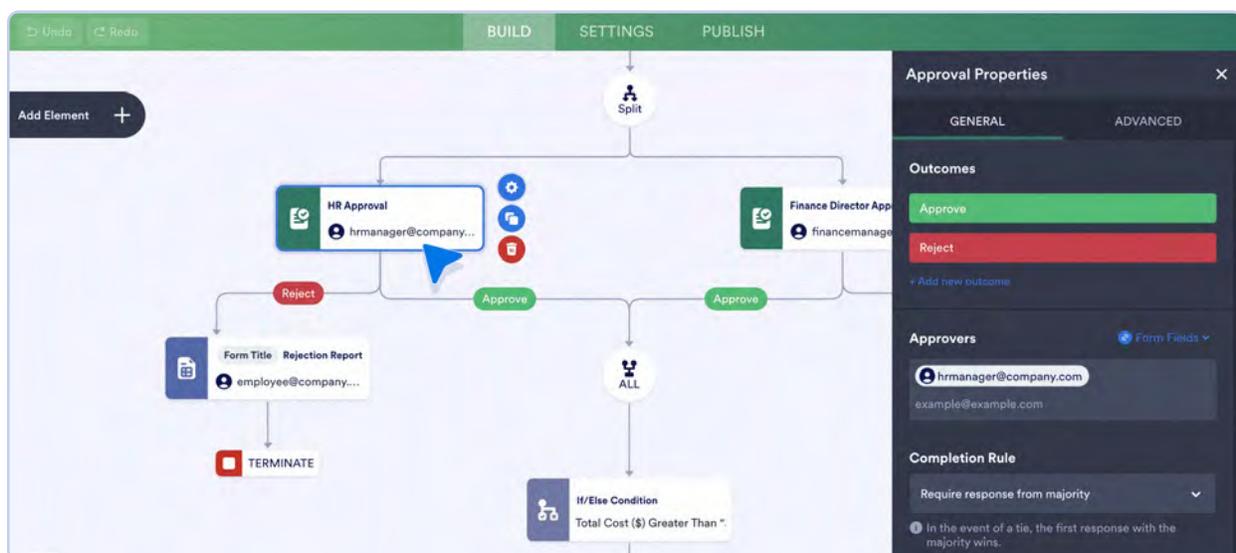
For example, if the HR manager wants employees to come into the office regularly, they will need to hire local candidates. The HR manager can set up a conditional branch to automatically deny applicants who don't live in their company's city, or to redirect them to HR managers in company offices in other cities.

## Merging/splitting flows

When a project has a lot of moving pieces that need to be approved by many different stakeholders, things can get a little confusing. For example, the hiring manager might need different information in their approval email than the HR manager, as well as different permissions. With the **Split Branches** element, the form owner can customize the emails and permissions for each approver.

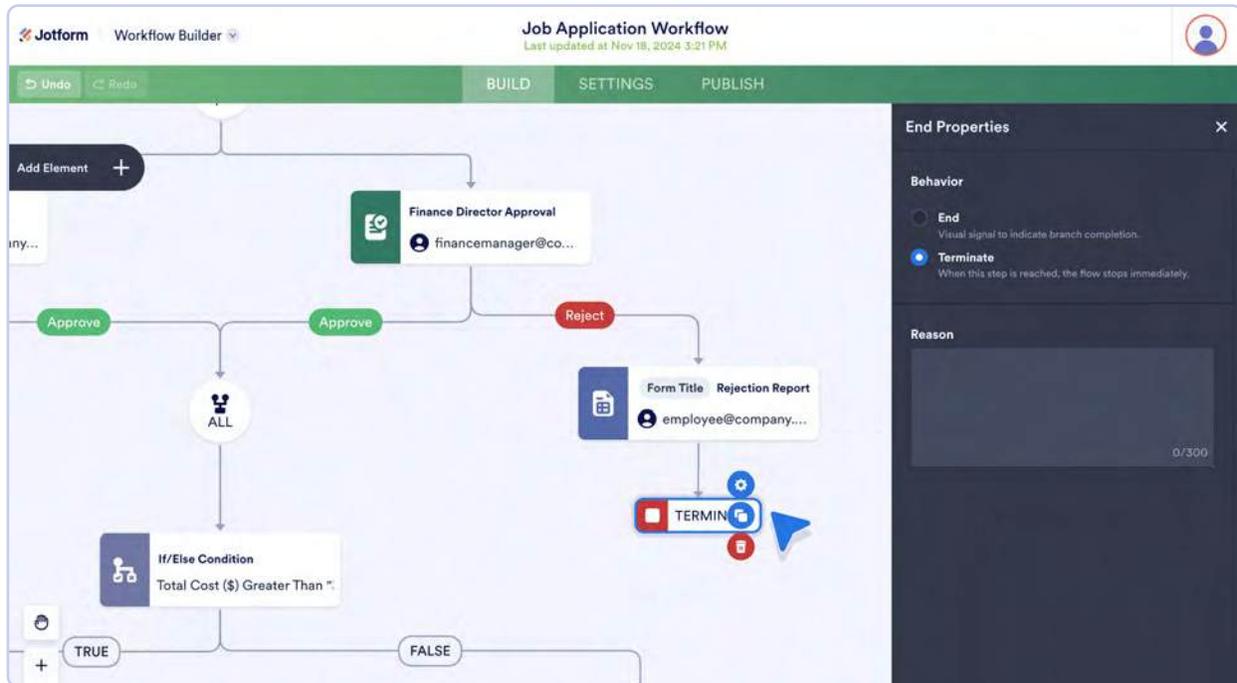


All you have to do to add a split branch to your workflow is drag and drop it into the builder. Then you can set up the conditions you need to split the workflow. The HR manager can simply add a split branch to customize the information and permissions for separate approvers, and then merge the workflow branches once a decision has been made.



## End

If you're building a workflow from scratch, you'll need to add the **End** element to end the approval process. In the End Properties, select the **Terminate** option.



End is also useful when your workflow contains parallel branches. If other branches will continue running after this one has been completed, select the **End** option in the element properties. If all branches should end once this step is complete, select the Terminate option.

Here's an example of how this might work in practice. Let's say we have a Split Branches element in our approval flow, with two parallel approval processes — one for a manager and one for the CEO — running concurrently. Select the Terminate property for the End element in the CEO's denial outcome. This way, if the CEO denies the request, the manager will no longer need to approve or deny the request. The process will simply end.



### Did you know?

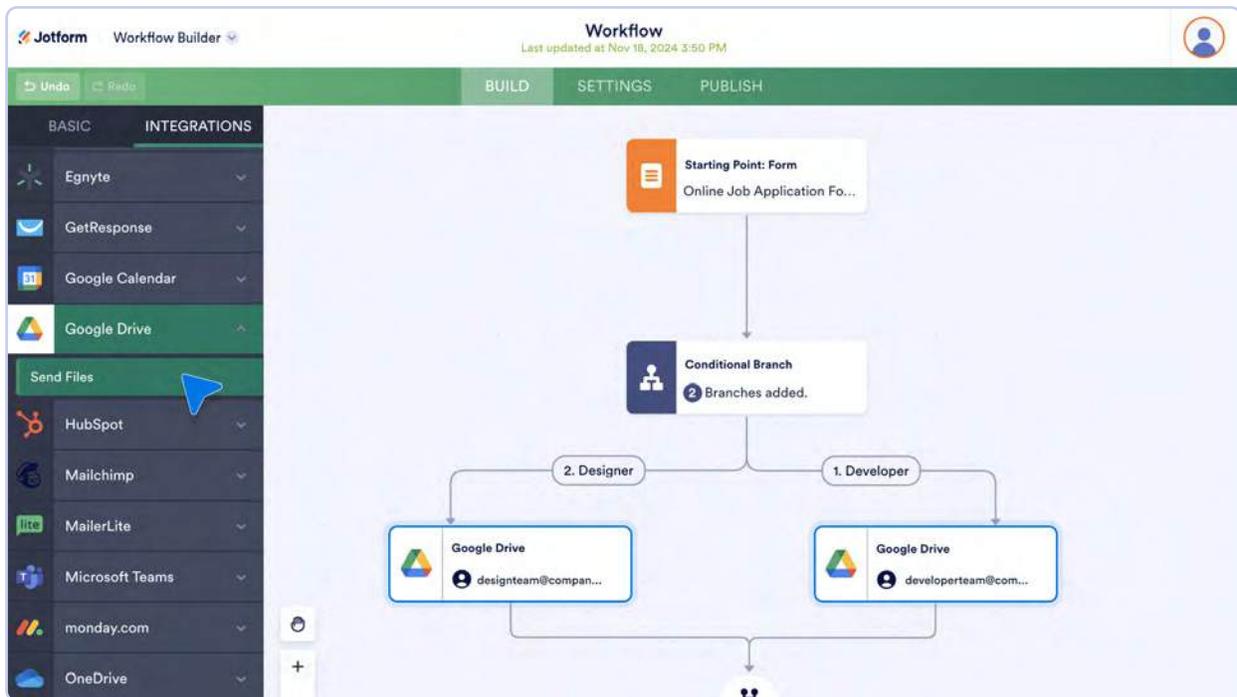


You can easily track who did what during the approval process in both Jotform Inbox and Jotform Tables? Each approval or denial is recorded and allows you an easy reference point for your needs.

## Integrations

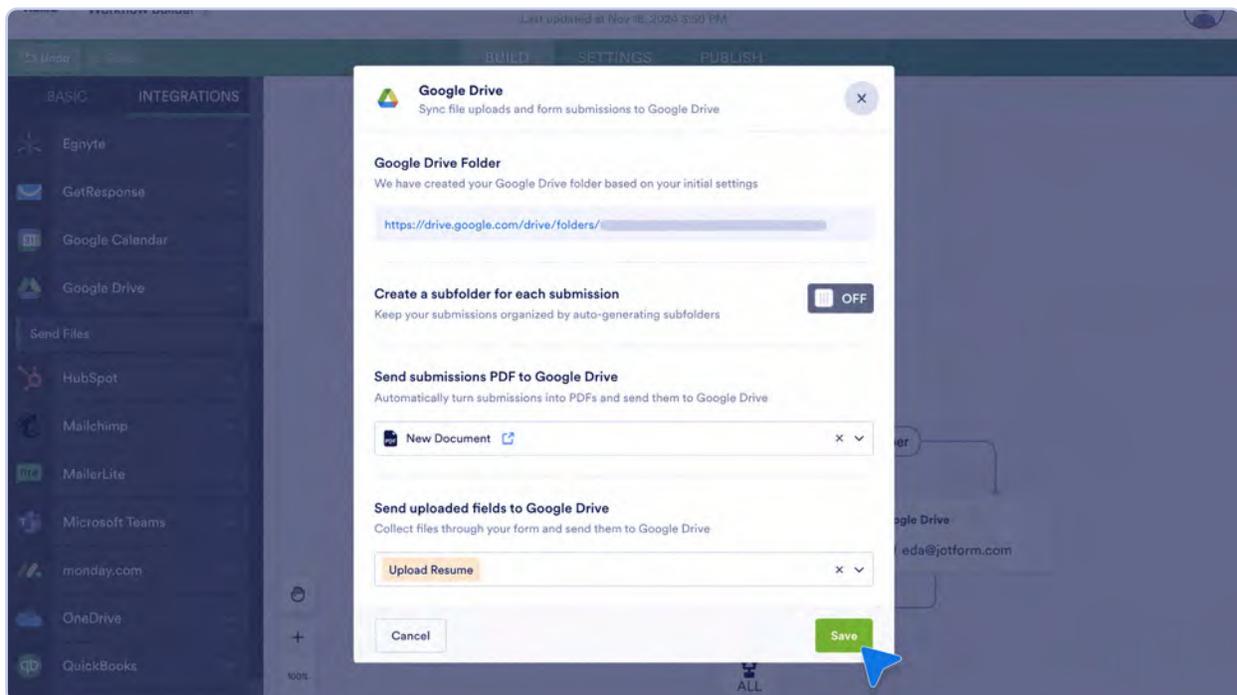
Jotform Enterprise is taking integration and automation to the next level with Workflows-specific integrations. Workflows empowers anyone in your organization to easily drag and drop third-party applications directly into their flow, further automating project management and saving everyone time.

Jumping back to our HR example, let's say you'd like to hire for three different roles. When the applications roll in, you want to alert three different stakeholders (or store the applications/resumes in corresponding folders for each department).



First, go to the **Integrations** sub tab next to the Basic Elements.

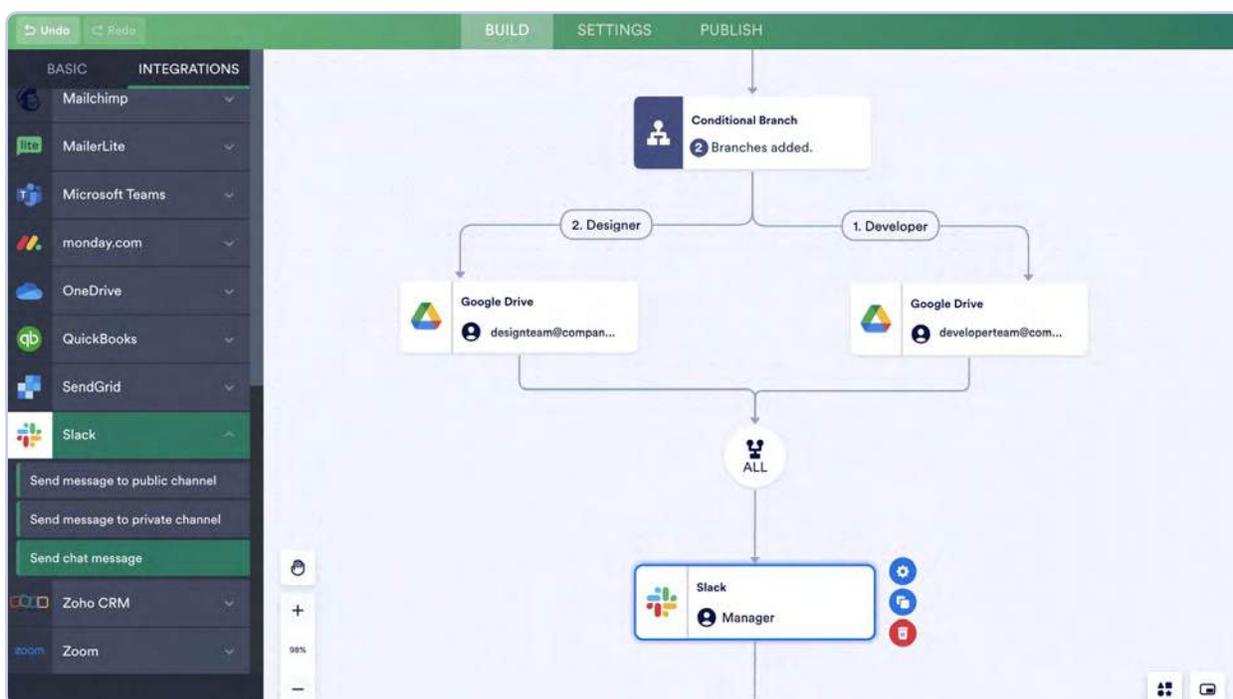
In this example, I've used the Conditional Branch element to send the completed applications to the corresponding Google Drive folders (for a writer, graphic designer, and videographer).



A new folder will automatically be created when you elect to send form submissions to Google Drive. In the integration settings, you can name this folder. You can also choose to send a PDF of the submission itself, and/or you can choose which form fields you'd like to send to your Drive folder (in this case, the resume).

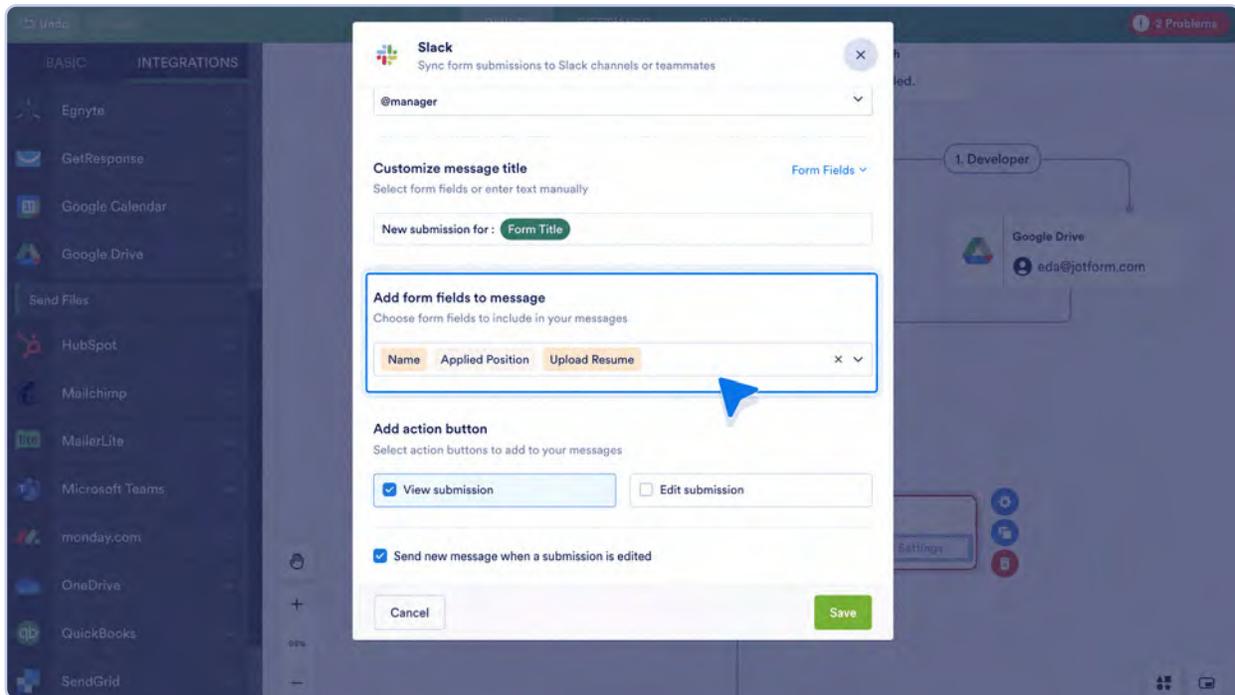
This is only one integration example and, similar to form submissions, each integration has its own settings and rules.

Now let's take it a step further. What if, in addition to cloud storage, you'd like to notify hiring managers in real time when applications come in? Just add another integration to your workflow! I've added a Slack integration to the flow so the group gets a heads-up.



In the Slack integration, your form can trigger a message to be sent to a public or private channel, or a chat message to go to an individual. For further customization, you can adjust the form fields that appear in your Slack message.

If you'd like to add quick shortcuts that your recipients can use directly from the Slack message, simply include View or Edit buttons for your submissions.



In one complete workflow, you can construct a neat way to automate a job application, resume review/storage/sharing, and stakeholder notification.

### Pro tip



Be advised that the only third-party Jotform Workflows integrations that are fully compatible with HIPAA servers are OneDrive, Microsoft Teams, Slack, Zoom, Google Drive, Google Calendar, Dropbox, Box, Zoho CRM, Egnyte, and monday.com.

Also, some integrations can work with HIPAA servers, but **they can only send non-PHI data**. These include Airtable, Constant Contact, HubSpot, Mailchimp, and MailerLite.

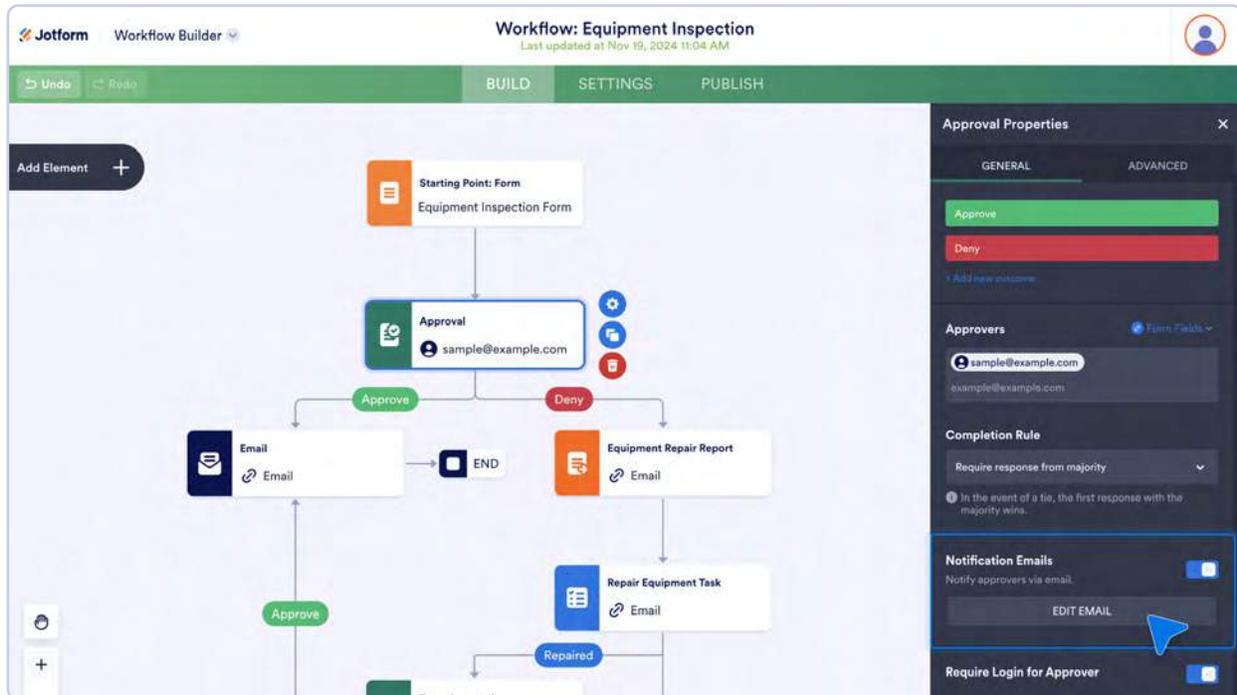
## White Labeling

With the new, advanced customization options for Workflows, your organization can white label each step of a workflow, reinforcing trust and brand loyalty at every touchpoint.

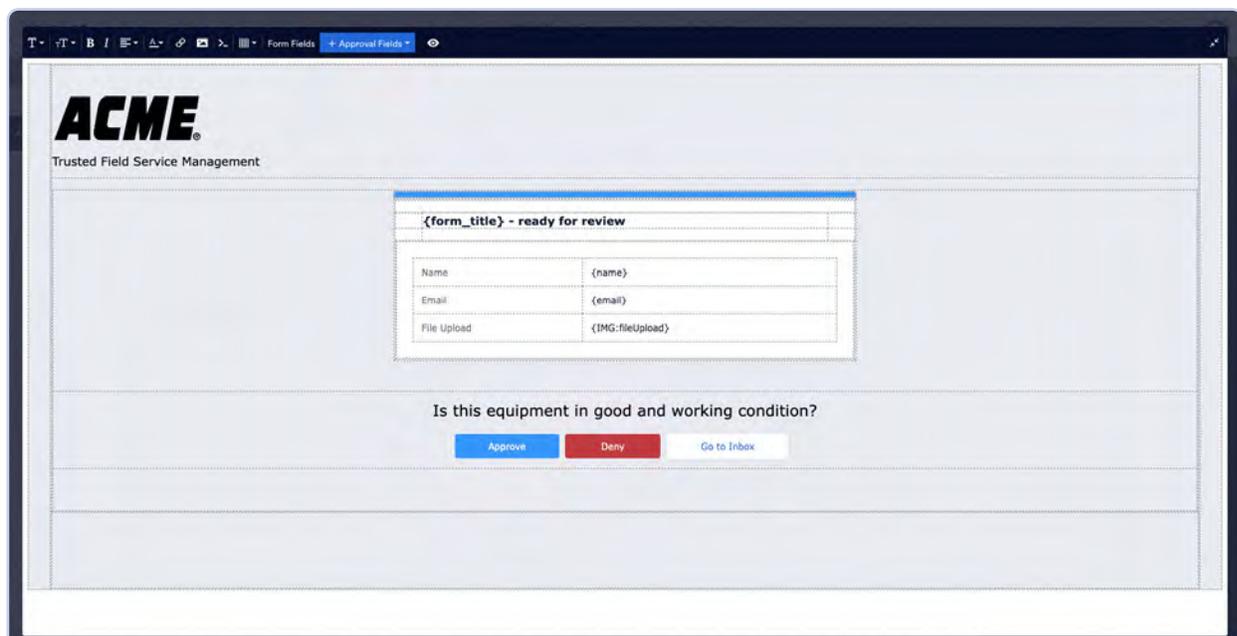
In addition to Jotform Enterprise's existing white-labeling capabilities for forms and e-signature documents, organizations can customize approval requests and task completion pages.

In a given workflow, once your branded form is submitted, a notification email is sent to the approver. You can white label that approval request email.

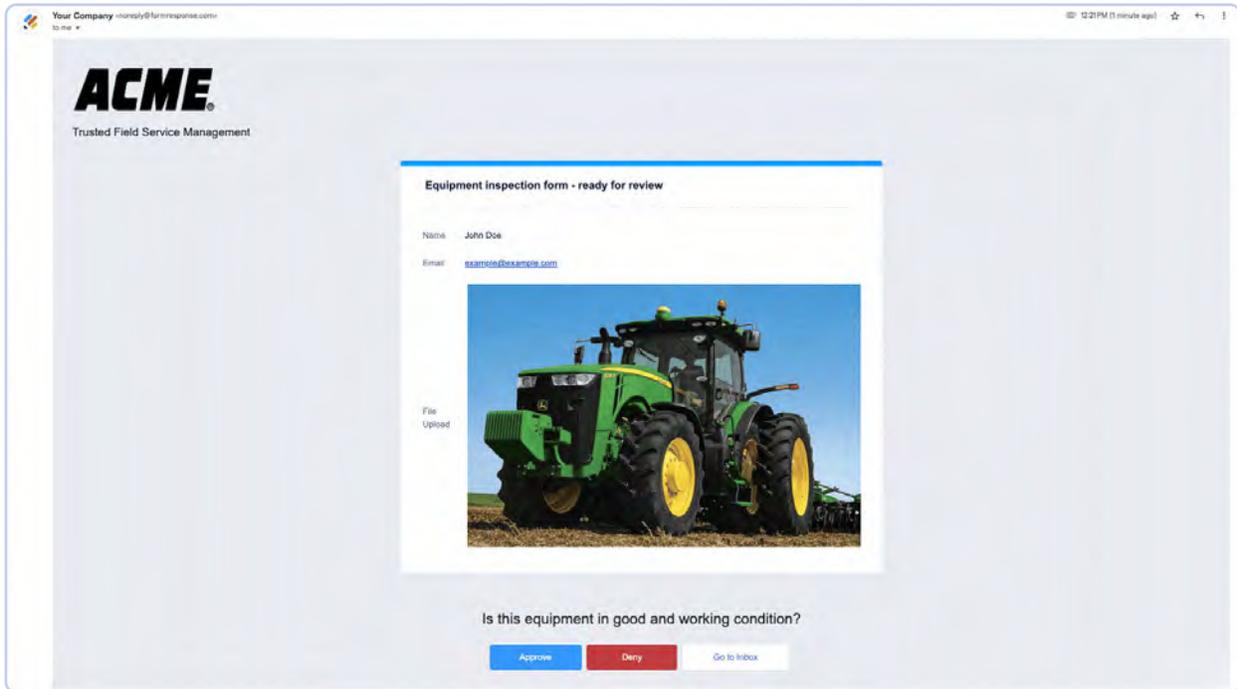
In the Notification Emails section, click **Edit Email** to customize the approval email.



In the email customization window, you can add a company logo, select custom colors, change the formatting, and include data from specific fields in the form, such as the name of the employee submitting it.



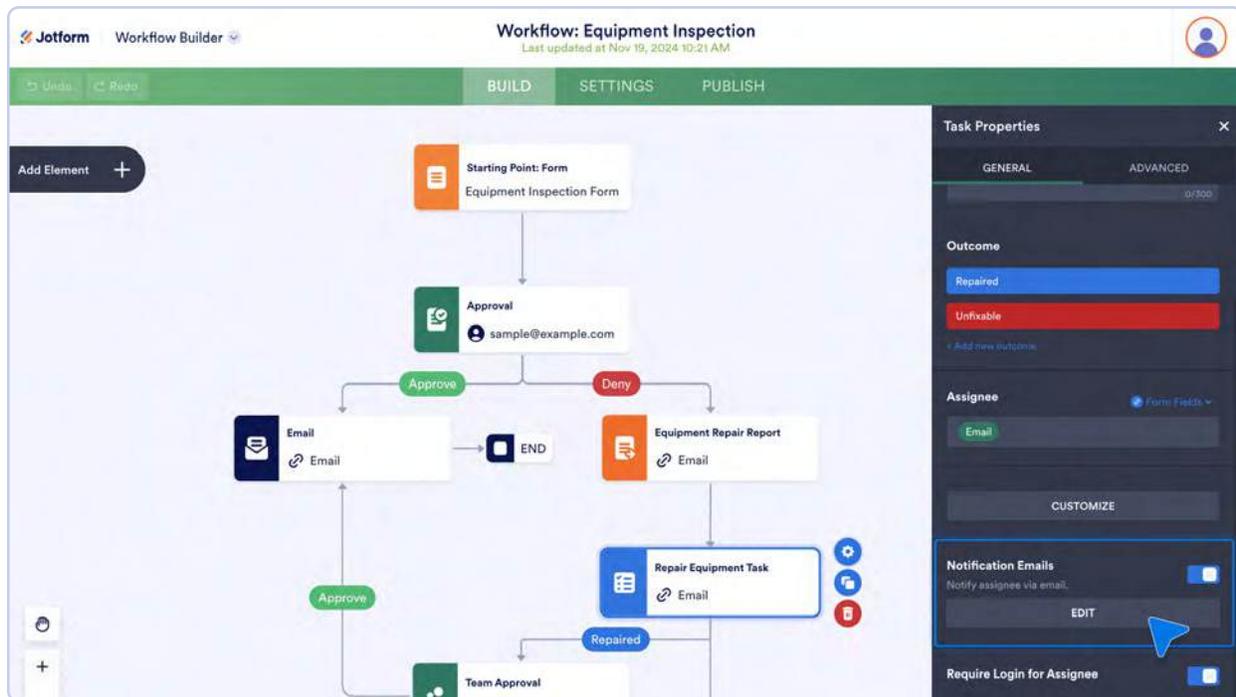
Click **Save** to finalize the white-labeled approval request. Now, when an employee submits the form, a fully customized approval email will be sent to the designated manager.



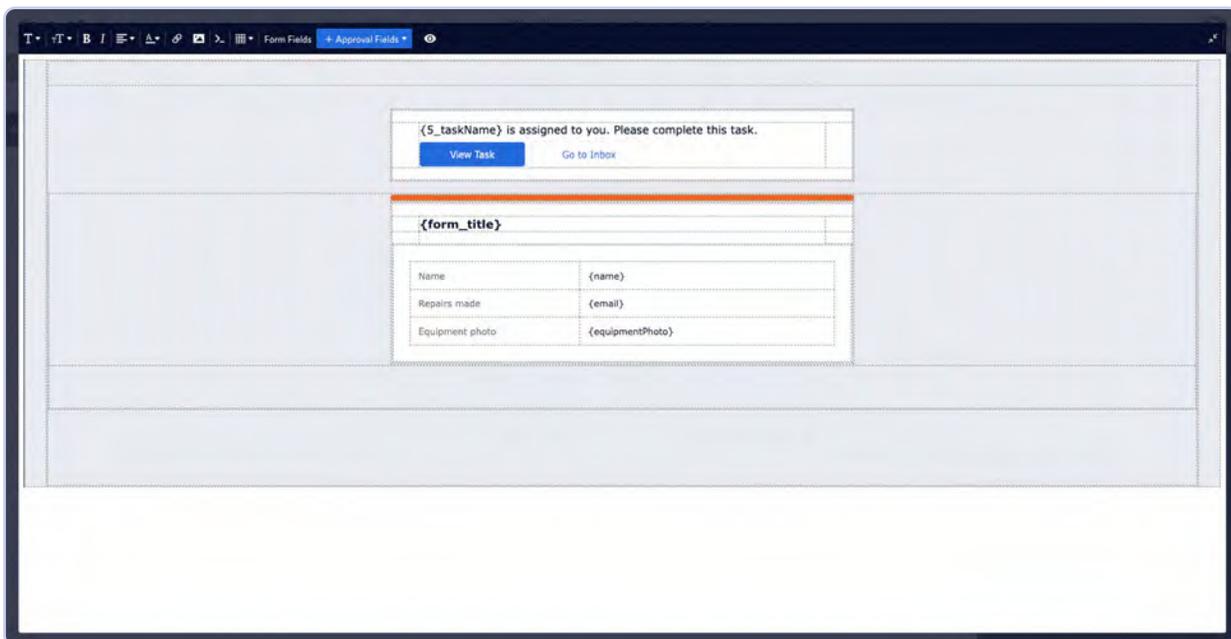
You can also use the white-labeling feature to send employees or external stakeholders custom-branded task requests.

Let's look at how to customize the email for the Task element.

To start, click the Task icon in the workflow, then click the gear icon to open the **Task Properties**. There are options to describe the task and add potential outcomes — in this equipment inspection use case, we'll use Repaired or Unfixable as the outcomes. To white label the email, click **Edit** in the **Notification Emails** section.



As with approval emails, you can customize and brand the data elements from specific form fields for task emails.



When the assignee clicks **View Task** in this email, a task page will open. These task pages are automatically white labeled using your organization's logo from the Admin Console.

The screenshot shows a Jotform workflow interface. At the top left is the ACME logo. The title of the workflow is 'Workflow: Equipment inspection form'. The main form is titled 'Repair Equipment'. It contains a question: 'Was the equipment fixable?' with a blue 'Complete' button and a dropdown arrow. Below this is a text area for the question 'If equipment is unfixable, please explain'. At the bottom of the form is another blue 'Complete' button.

### Did you know?



You can also white label your Thank You page? In the Task Properties, click the **Customize** button below the **Assignee** section. When the task builder opens, click the **Thank You** tab, where you can customize your page's company logo, branding, and colors.

## Settings tab

Once you've set up your approval flow to your liking, you can move to the Settings tab to personalize it even further. For instance, you can change the name of your approval flow to something that's easy to remember and will fit your brand.

If you need to use this workflow for a short amount of time, you can enable or disable it using the **Status** dropdown menu. Sometimes, you may need to restart your flow when someone edits their submission. Set the **Restart Workflow on Submission Edit** dropdown to **Enabled** to restart the flow whenever someone makes an edit.

The screenshot shows the 'Settings' tab in the Jotform Workflow Builder. The workflow is titled 'Workflow: Equipment Inspection' and was last updated on Nov 19, 2024 at 10:21 AM. The 'Settings' tab is active, showing options to 'BUILD', 'SETTINGS', and 'PUBLISH'. The 'WORKFLOW SETTINGS' section includes:

- Workflow Title:** Enter a short, descriptive name for this flow. The current title is 'Workflow: Equipment Inspection'.
- Status:** You can enable or disable your flow. The status is set to 'Enabled'.
- Restart Workflow On Submission Edit:** The flow will automatically restart every time submitters edit their submissions. This option is also set to 'Enabled'.

A blue arrow points to the 'Restart Workflow On Submission Edit' dropdown menu.

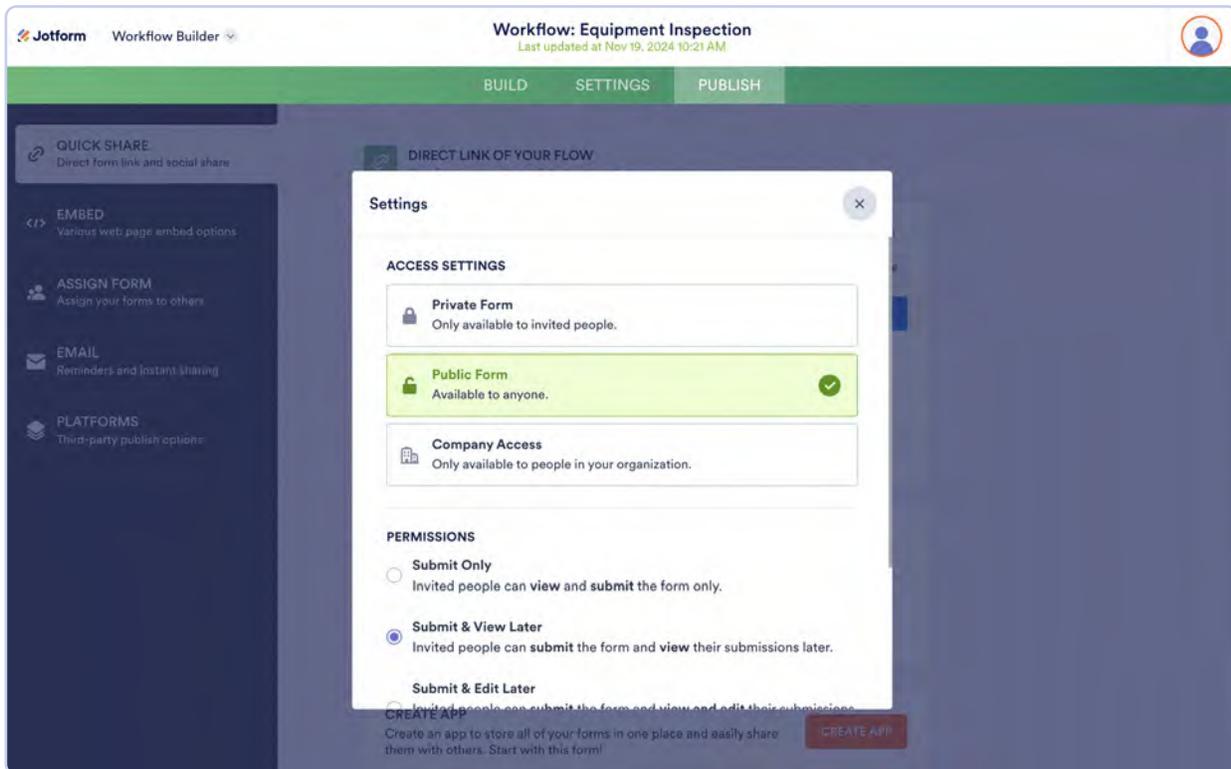
## Publish tab

Now that your approval flow is customized exactly to your liking, move to the **Publish** tab to enable your workflow. Please note that the publish options apply to the form that's attached to your approval, not the workflow itself.

The screenshot shows the 'Publish' tab in the Jotform Workflow Builder. The workflow is titled 'Workflow: Equipment Inspection' and was last updated on Nov 19, 2024 at 10:21 AM. The 'Publish' tab is active, showing options to 'BUILD', 'SETTINGS', and 'PUBLISH'. The 'DIRECT LINK OF YOUR FLOW' section indicates that the flow is securely published and ready to use at the address: <https://demo.jotform.com/243231409796057>. The 'SHARE WITH LINK' section shows a 'Public Form' status and a 'Settings' icon. The 'INVITE BY EMAIL' section has a 'To:' field for entering email addresses. The 'SHARE FORM' section offers sharing options for Facebook, WhatsApp, X, LinkedIn, and QR code. The 'CREATE APP' section provides an option to create an app to store all forms in one place.

## Quick Share

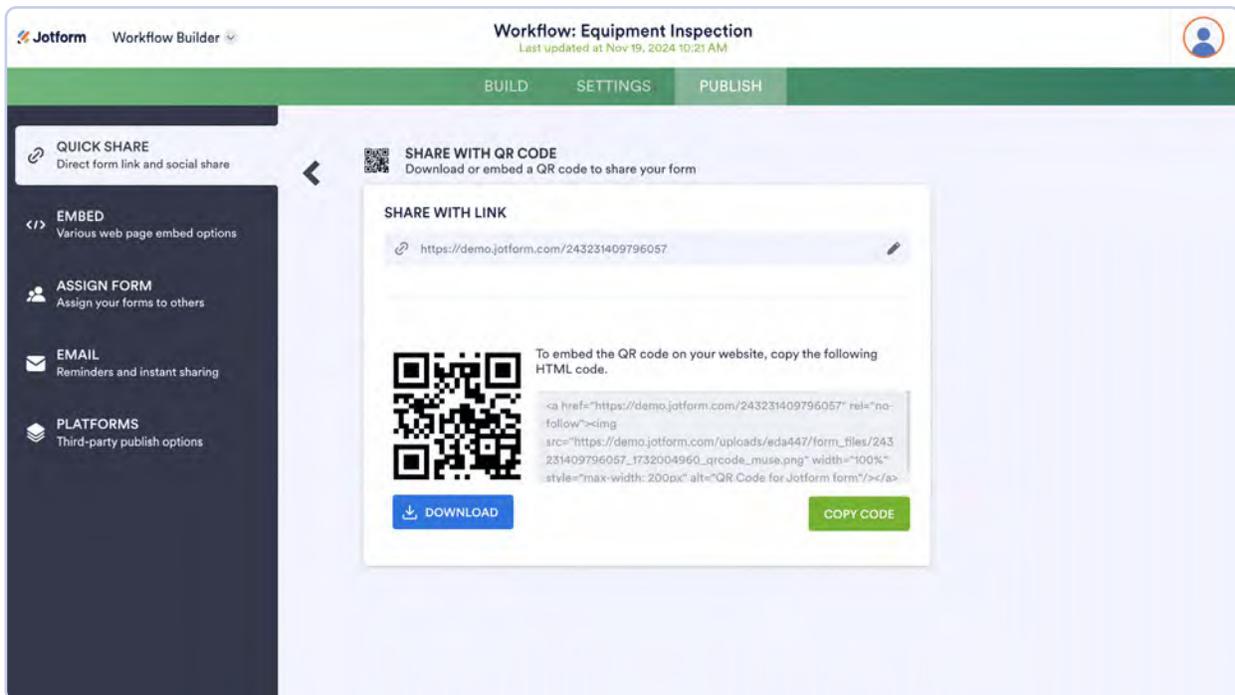
The first option you'll see in the **Quick Share** tab of the Publish menu is **Link to Share**. All you have to do is click the **Copy Link** button and share the link with the appropriate people. You'll also find permissions and access settings; just click the gear icon to adjust those. You can make your workflow public, or you can restrict access to only those with a link. You can also make sure only people in your organization have access to your workflow.



When it comes to personalizing your permissions, you have three options. The first is **Submit Only**, meaning your users will only be able to submit the form that accompanies your approval flow. This setting is applicable to someone filling out an application or a purchase order.

If you want your submitters to be able to view their answers to the form after they submit them, the **Submit & View Later** option is best. But note that they will only be able to view their submission, not edit it. If you want your users to be able to edit their submissions, the **Submit & Edit Later** option is ideal.

Another easy way to share the form attached to your workflow is via a QR code. All your submitters have to do is use the camera on their phones to go to your form. The QR code is the easiest option if you need to quickly share your form with a lot of people.



The screenshot shows the Jotform Workflow Builder interface for a workflow named "Equipment Inspection". The top navigation bar includes "BUILD", "SETTINGS", and "PUBLISH" tabs. A sidebar on the left contains several sharing options: "QUICK SHARE", "EMBED", "ASSIGN FORM", "EMAIL", and "PLATFORMS". The main content area is titled "SHARE WITH QR CODE" and includes a "SHARE WITH LINK" section with a URL input field containing "https://demo.jotform.com/243231409796057". Below the link is a QR code and a section for embedding HTML code. The HTML code is: 

```
<a href="https://demo.jotform.com/243231409796057" rel="nofollow"></a>
```

 There are "DOWNLOAD" and "COPY CODE" buttons at the bottom of the QR code section.

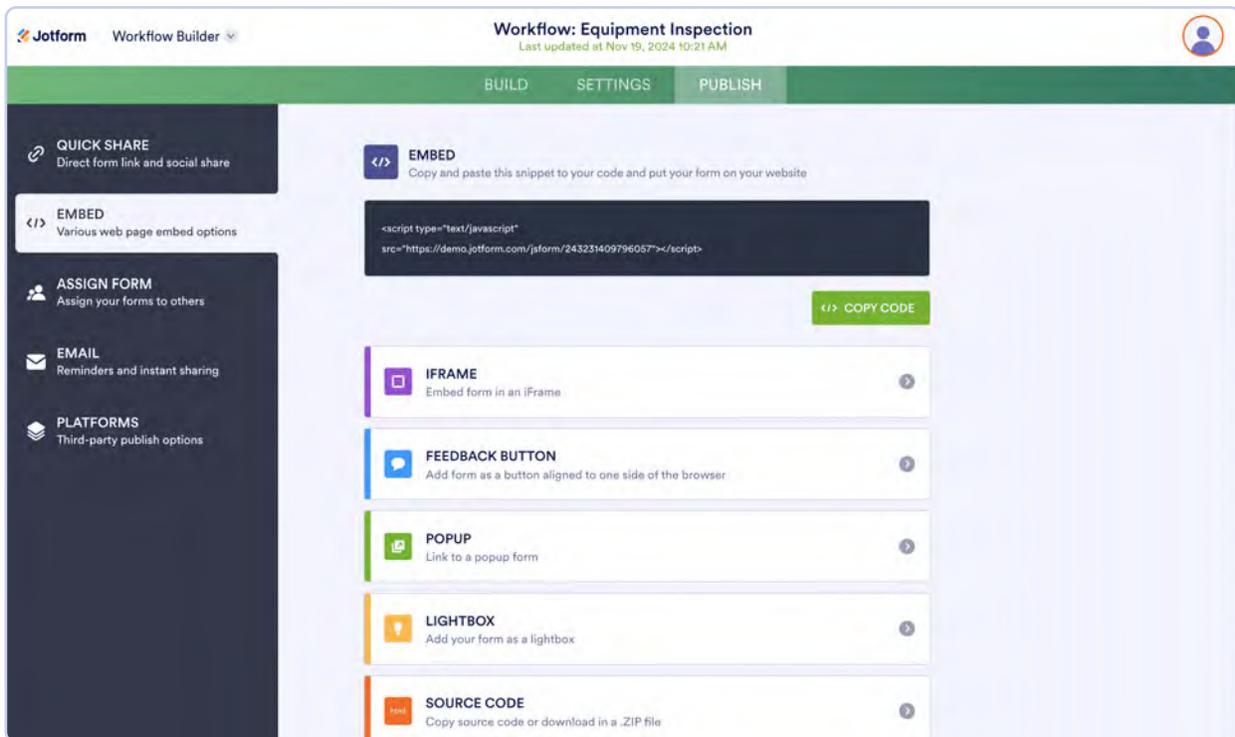
### Did you know?



Your stakeholders can view and take action on tasks, signatures, or approvals assigned to them in the Jotform mobile app. Workflow owners can follow the status of the workflows they start.

## Embed

Jotform creates embed codes, so it's easy to embed your form into any hosting platform you choose. We provide code for iFrames, feedback buttons, popup windows, and lightboxes; we also provide you with the original source code.



On a related note, we have website embed options for the source form tied to your workflow. These options include services such as WordPress, Wix, Squarespace, and others; they are located in the Publish section of the Form Builder in the Platforms tab.

## Assign Form

The **Assign Form** tab allows you to assign a form to someone else, giving them easier access to the form and allowing you more granular control over permissions. (This is particularly helpful when you want someone to collect submissions on your behalf.)

There's a link you can copy and paste to quickly assign your form. If you need to assign the form to everyone in your organization (all current and future licensed users added to your server), simply toggle the switch at the bottom to automatically assign the form to everyone, no need to manually type in email addresses. But if you want to send your form to a few people only, you have the option to type in email addresses. (The access settings are the same as those in the Quick Share section.)

The screenshot shows the Jotform Workflow Builder interface for a workflow titled "Equipment Inspection" (last updated Nov 19, 2024 10:21 AM). The interface has a top navigation bar with "BUILD", "SETTINGS", and "PUBLISH" tabs. A left sidebar contains menu items: "QUICK SHARE", "EMBED", "ASSIGN FORM" (highlighted), "EMAIL", and "PLATFORMS". The main content area is titled "ASSIGN FORM" and includes the following options:

- ASSIGN WITH LINK**: A "Public Form" toggle and a "Settings" gear icon. A link field contains "https://demo.jotform.com/assign/243231409796057/243231..." with a "COPY LINK" button.
- ASSIGN BY EMAIL**: A "To:" field with the placeholder text "Enter email addresses to send invitation with permissions."
- ASSIGN TO EVERYONE IN THE ORGANIZATION**: A toggle switch currently set to "OFF".

## Email

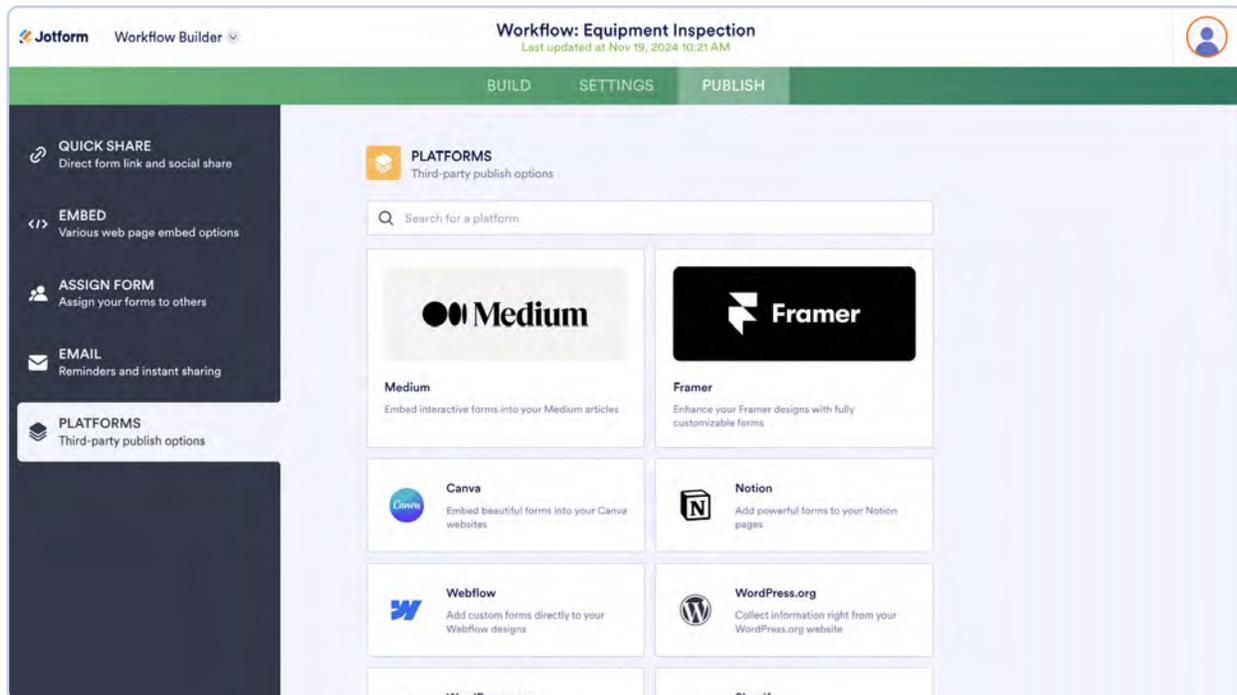
In the **Email** tab, you have the option to share a link to your form via email, and you can schedule reminder emails. Scheduling reminder emails for people to fill out your form is especially helpful and allows you to fully automate the form filling process.

The screenshot shows the Jotform Workflow Builder interface for the same workflow "Equipment Inspection". The "EMAIL" tab is selected in the left sidebar. The main content area is titled "EMAIL FORM" and includes the following options:

- SHARE ON EMAIL**: A button to "Share a direct link to your form via email."
- SCHEDULE A REMINDER EMAIL**: A button to "Send periodic emails to remind people to fill out your form."

## Platforms

The **Platforms** tab shows all of your third-party software publishing options. If you want to publish your form on a specific platform, just click on its tile. You'll get the code you need to add your form to that platform and find directions on how to publish your form.



Additionally, if you don't see your preferred option in the Platforms tab, it may be possible to connect to other services with Jotform's easy-to-use API.

## Jotform API

Your workflows-related form submissions can do even more for you and your stakeholders with Jotform's API. The API allows businesses to customize the data flow so it integrates with the existing, proprietary, or preferred solutions in your tech stack.

Here are a few ways an API can help you further streamline your workflow:

- Import submission data from CSV and Excel files, and submit them to Jotform via the API.
- Create a widget from scratch or modify an existing widget to create a new widget.
- Combine submissions from different forms into one CSV file (implemented with JavaScript and PHP).
- Download your submissions' uploaded files and attachments directly to your computer (implemented with Ruby).

## Making the most of your data

Now that you know how to streamline your data with Jotform Approvals, you'll never have to sift through mountains of paperwork to get things done again. Whether you want to use Approvals to hire new employees or to kick off a requisition process, Jotform has you covered.

## Chapter 12

# Visualizing your data with Jotform Reports

With powerful forms and apps from Jotform Enterprise, you can quickly collect loads of useful data. Whether it be lead-gen info, client order details, or employee performance stats, organizations collect a vast range of diverse datasets. Because of this, we offer a wide variety of reporting options, so no matter the use case, you'll always be able to effectively visualize and share your data.

Healthcare provider One to One Health, for example, leverages Jotform Enterprise reporting features to deliver specific, impactful statistics to clients and internal stakeholders. With Enterprise reporting, One to One Health also calculates anonymized NPS scores for clients.

“Our NPS is 96.5, which sounds unbelievable, but I’ve anonymized the data so I can show it. It’s super powerful to prove our value to skeptical buyers.”

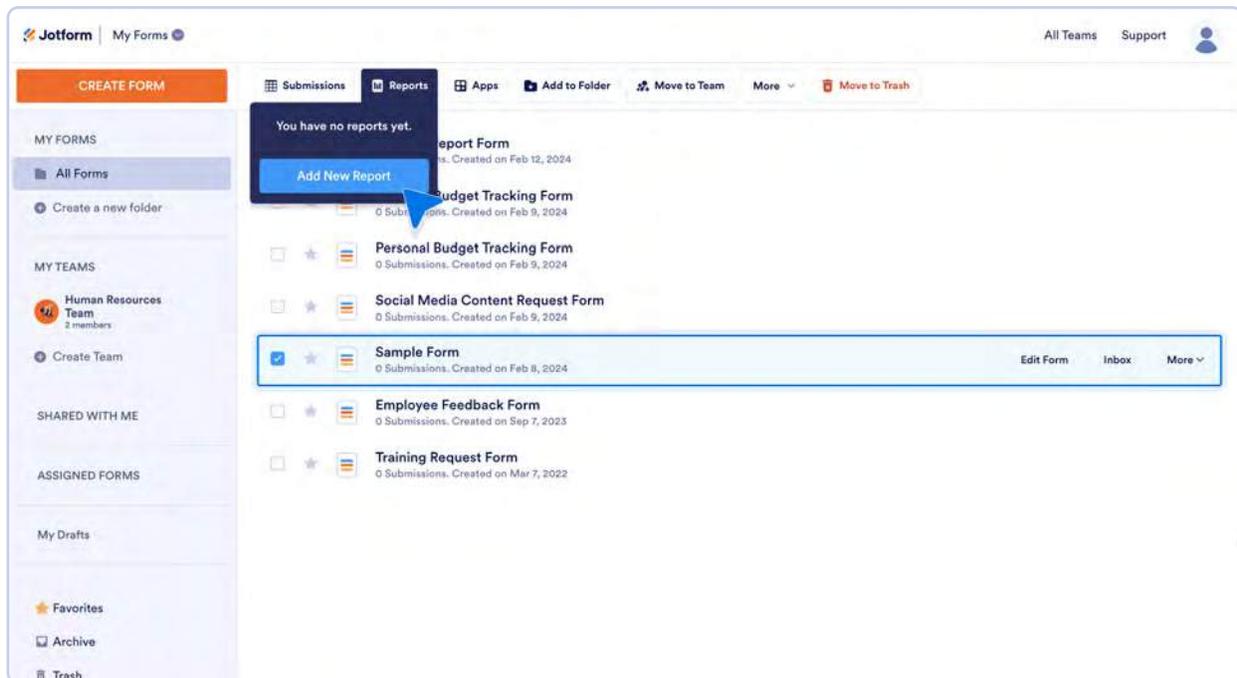
— David Kinzler, CEO, **One to One Health**

In this chapter, we'll look at how your organization can use Jotform Reports to quickly and easily convert form responses into simple, beautiful reports to help you analyze data and make more informed decisions.

Let's dive in!

## Creating a report

Creating a report with Jotform Enterprise is easy. To start, go to your Enterprise homepage, also known as the **My Forms** page. From there, select the form you would like to generate a report from. Next, open the **Reports** menu at the top of your form list, then click **Add New Report**.



Next, you'll be prompted to select which type of report you would like to generate. Currently, there are eight different report types to choose from:

- Visual Report
- Digest Emails
- Excel Report
- HTML Table Listing
- Grid Listing
- CSV Report
- RSS Listing
- Calendar Listing

Each report type has a specific and specialized use case. Not sure which report best suits your data? Don't worry, we'll cover each report in detail throughout this chapter, starting with the Visual Report.

## Visual Report

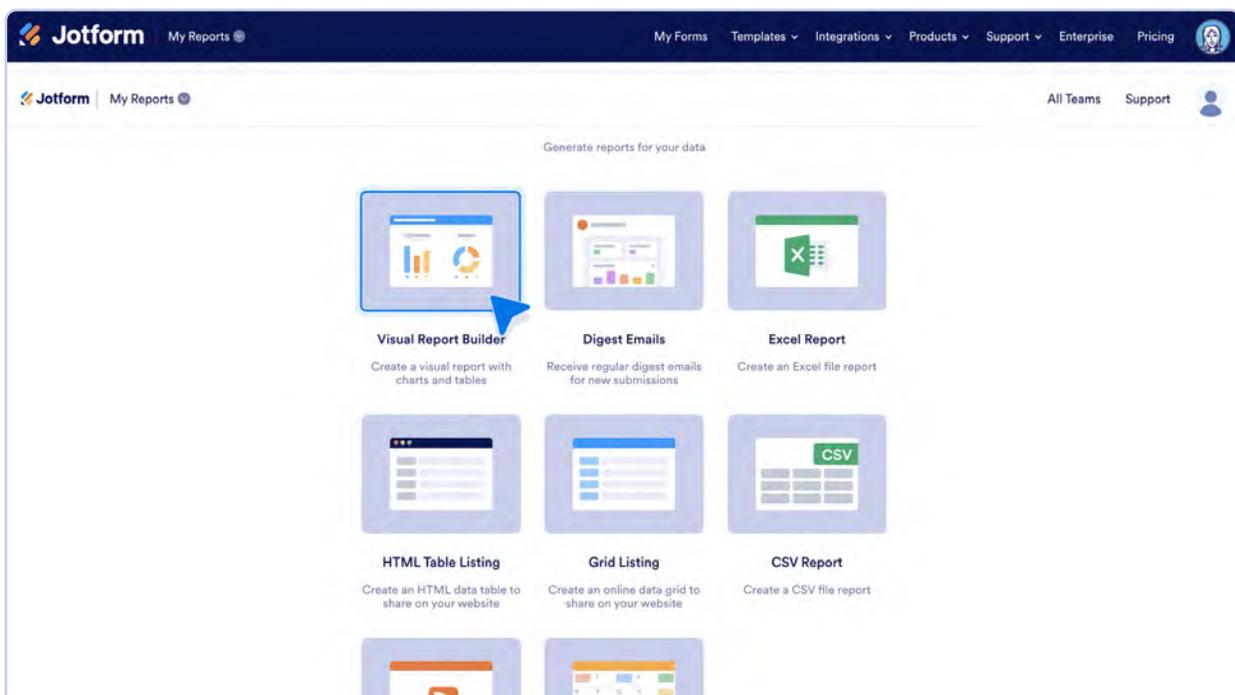
The Visual Report is our most comprehensive, customizable reporting option. This report generates multiple chart types from different aspects of your submission data and organizes them in a slide deck format.

The best part about the Visual Report is that it is 100 percent customizable. Want to rearrange, delete, or change your charts entirely? No problem; our drag-and-drop interface makes it easy to brand, customize, and share the perfect report.



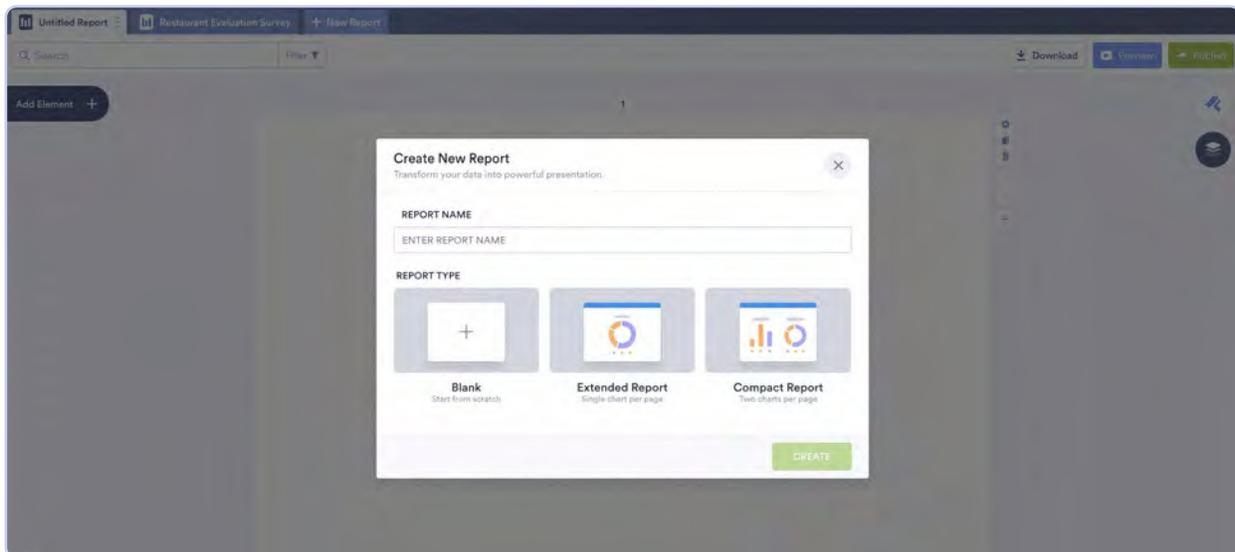
## Generating a Visual Report from a form

To begin generating a Visual Report from an existing form, go to your My Forms page. From there, select your desired form. Next, click Reports at the top of the screen, click Add New Report, and then select **Visual Report Builder**.



After selecting Visual Report Builder, you'll be prompted to name your report and choose a visual report option:

- **Blank:** Start from scratch and add your charts manually.
- **Extended Report:** A single chart is shown per page by default.
- **Compact Report:** Two charts are shown per page by default.



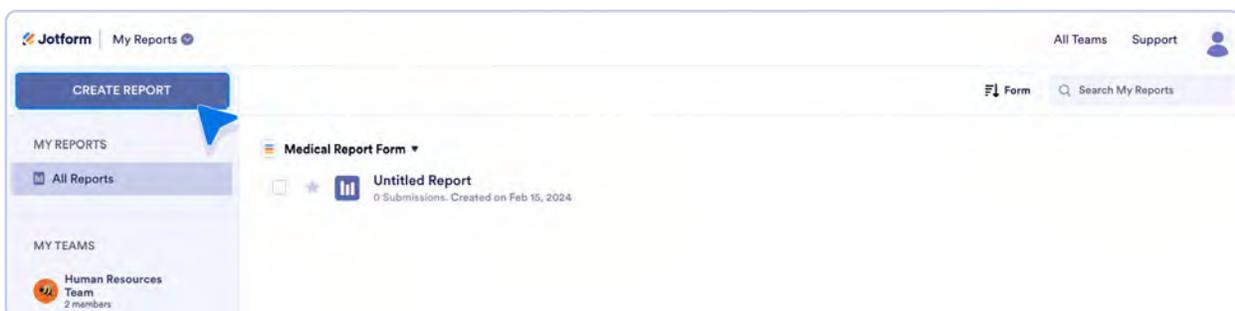
Once you've selected a report option, your report will be generated.

## Generating a Visual Report from a dataset

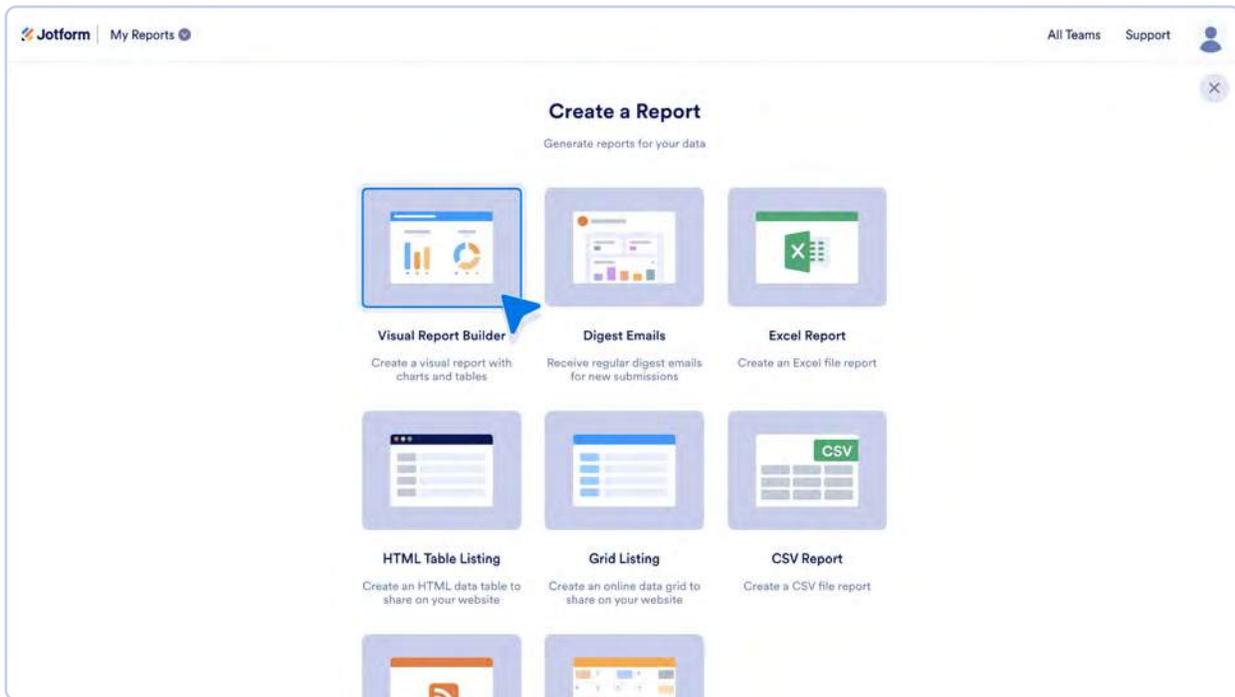
Visual reports can be generated from existing forms within Jotform Enterprise and from third-party data files, such as CSV and Excel files.

To generate a Visual Report from a third-party dataset, go to the **My Reports** page. You can access this page from the My Forms page by clicking on **My Forms** in the top left corner of your Enterprise instance, then clicking on My Reports.

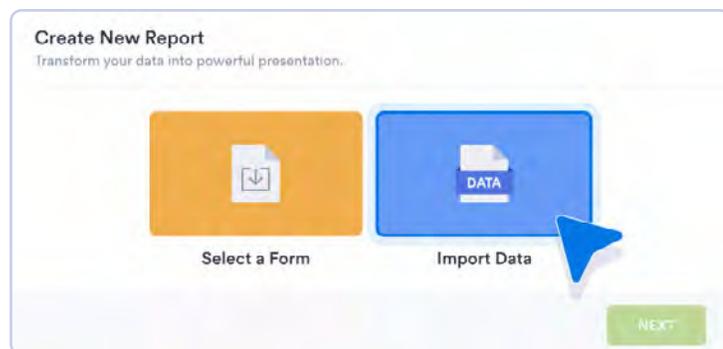
From the My Reports page, click **Create Report**.



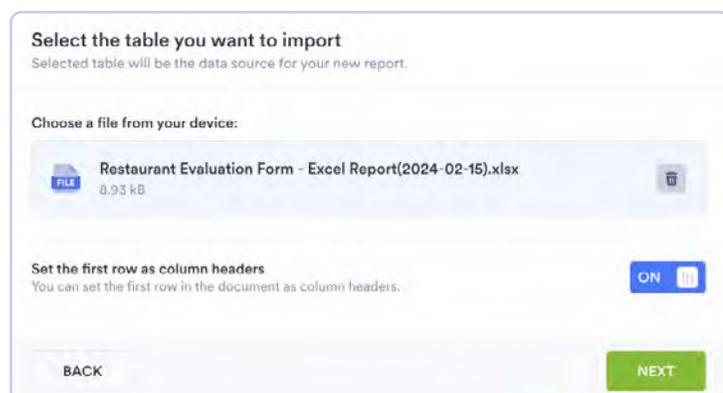
You will then be prompted to select the type of report you would like to create. Click Visual Report Builder.



You'll be prompted to either import data from a form or from a dataset. Click **Import Data** to import from a dataset.



Now you'll be asked to upload your dataset file. All CSV, XLS, and XLSX file types are supported. From here, upload your data file, then click **Next** once it has finished uploading.



Next, you will be prompted to select the column types and column names for your imported data. These will automatically populate from your dataset. Double-check that the columns are correct, then click **Start Import**.

The screenshot shows the 'Imported Tab' configuration interface. At the top, it says 'Imported Tab' and 'Submissions' with '16 columns'. Below this is a table with two columns: 'IMPORTED COLUMNS' and 'COLUMN TYPES'. The table contains the following data:

| IMPORTED COLUMNS         | COLUMN TYPES |
|--------------------------|--------------|
| IP                       | Short Text   |
| Submission ID            | Short Text   |
| Submission Date          | Short Text   |
| Day Visited:             | Short Text   |
| Dine In / Take Out:      | Short Text   |
| Food Quality:            | Short Text   |
| Overall Service Quality: | Short Text   |
| Cleanliness:             | Short Text   |
| Order Accuracy:          | Short Text   |
| Speed of Service:        | Short Text   |
| Value:                   | Short Text   |
| Overall Experience:      | Short Text   |

At the bottom of the screen, there are two buttons: 'BACK' and 'START IMPORT'.

After your data has finished importing, you will be prompted to name your report and select which type of visual report you would like to generate. The report types are the same as the options when creating a visual report from a form.

The screenshot shows the 'Create New Report' interface. At the top, it says 'Create New Report' and 'Transform your data into powerful presentation'. Below this is a 'REPORT NAME' field with the placeholder 'ENTER REPORT NAME'. Below the field are three report type options:

- Blank**: Start from scratch
- Extended Report**: Single chart per page
- Compact Report**: Two charts per page

At the bottom right of the screen, there is a 'CREATE' button.

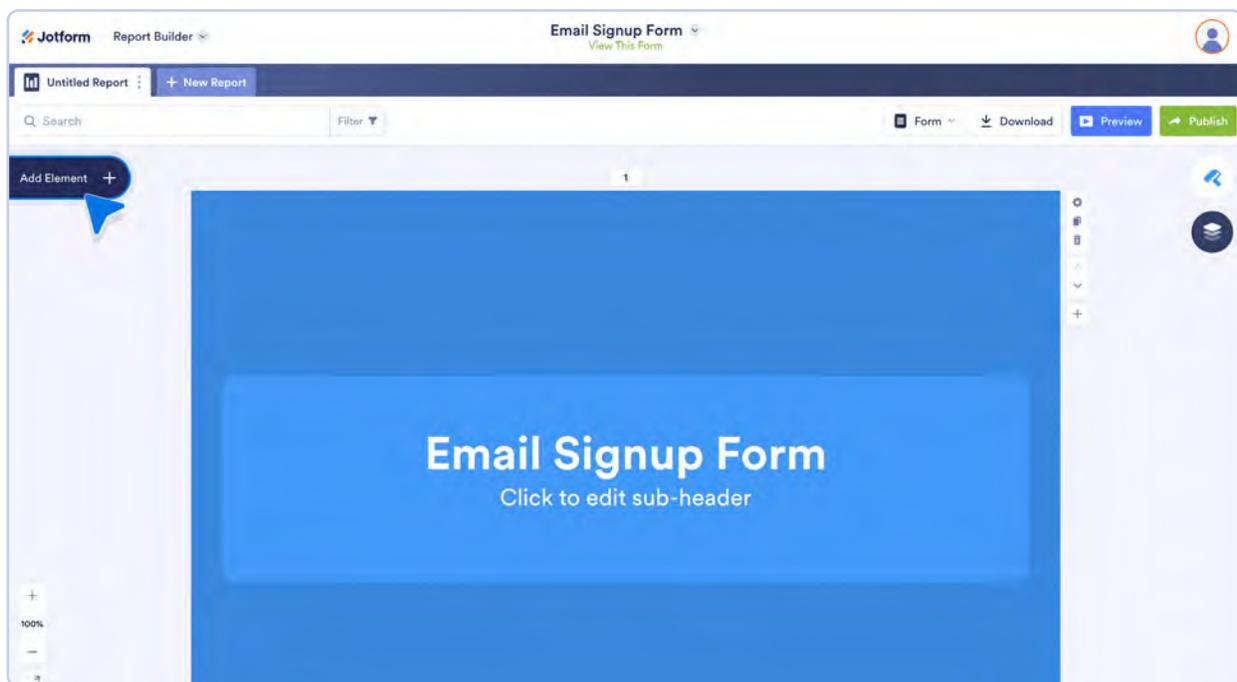
After naming and choosing a visual report type, click Create.

## Customizing your Visual Report

There are tons of different ways to customize your Visual Reports. You can add your organization's logo, change slide colors, add images, modify charts, and much more. Let's look at some of the different ways to customize Visual Reports.

### Adding elements

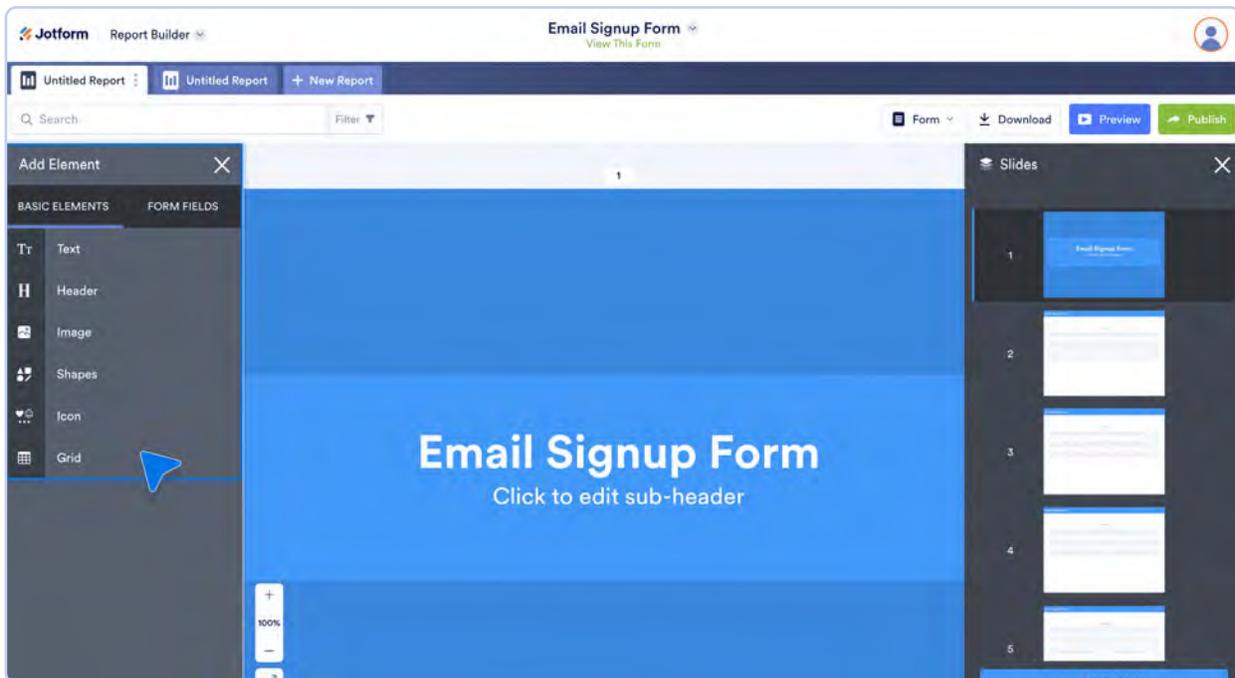
In the Visual Report Builder, you're free to add different elements and form fields to your report. To do this, click the **Add Element** button on the left side of the screen.



From here, you'll see the option to add **Basic Elements** and **Form Fields**.

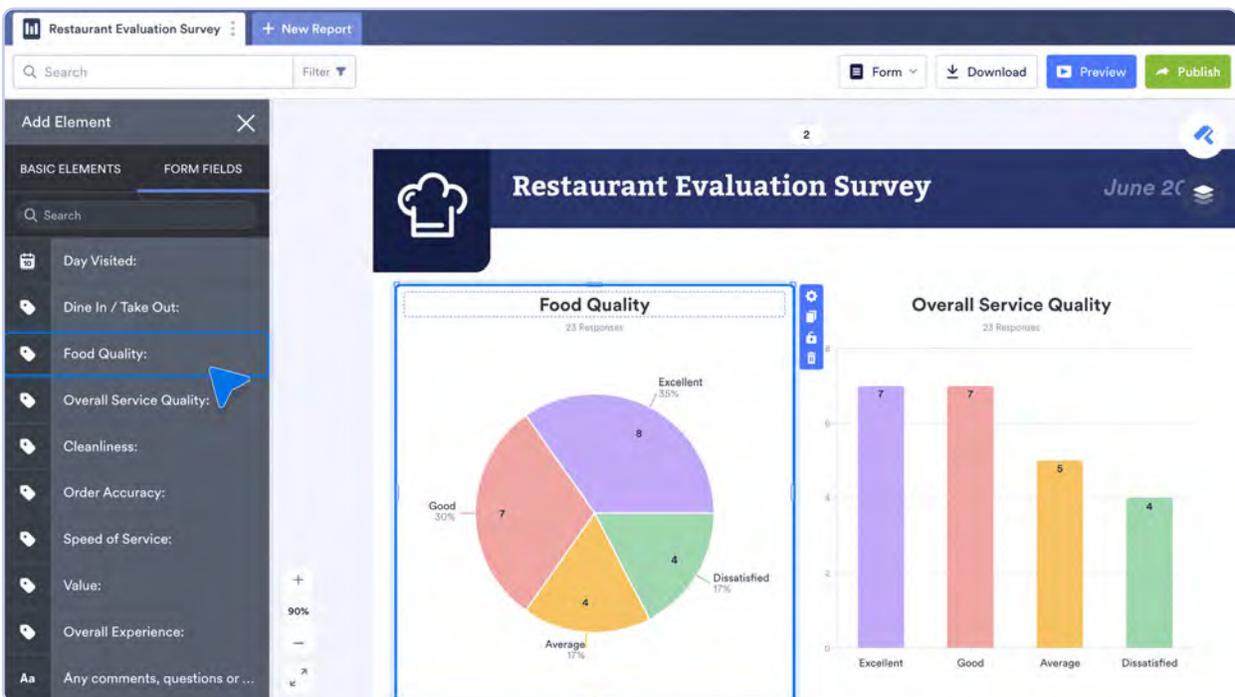
Basic elements are general report elements that can help with the overall design and branding of your report:

- **Text:** This rich text editor can be used to add long paragraphs or hyperlinks.
- **Header:** Use this element to add a report title and a short description.
- **Image:** Add your company logo.
- **Shapes:** Include shapes in the report.
- **Icon:** Include icons in the report.
- **Grid:** Include the submission data table in the report.



To add a basic element, simply click on it or drag it from the left menu, and drop it into your report.

You can also add Form Fields to your report. When you add a Form Field, your report will generate a chart from the selected field's submission data.



## Colors, chart types, and design

Once added to your report, charts are completely customizable. To access chart customization settings, click on a chart, then click the gear icon in the top right corner of the chart. This will open the **Chart Settings**.

The screenshot shows the Jotform Report Builder interface for a 'Restaurant Evaluation Survey' report. The main area displays two charts: a horizontal bar chart for 'Cleanliness' and a donut chart for 'Order Accuracy'. The 'Cleanliness' chart shows the following data:

| Response     | Count | %   |
|--------------|-------|-----|
| Excellent    | 8     | 36% |
| Average      | 7     | 32% |
| Good         | 5     | 23% |
| Dissatisfied | 2     | 9%  |

The 'Order Accuracy' chart shows the following data:

| Response     | Count | %   |
|--------------|-------|-----|
| Excellent    | 8     | 36% |
| Good         | 6     | 27% |
| Average      | 4     | 18% |
| Dissatisfied | 4     | 18% |

The 'Chart Settings' panel is open, showing the 'GENERAL' tab. The 'Question Title' is 'Cleanliness'. The 'Show Summary' toggle is turned ON. The 'Chart Type' section shows 'Basic' selected. The 'Metric' section is empty.

In the settings, you have the ability to customize your chart type, data, and style. To customize the colors and style of your entire report, click on the paint roller icon in the top right corner of the Report Builder.

The screenshot shows the Jotform Report Builder interface for a 'Restaurant Evaluation Survey' report. The main area displays two charts: a horizontal bar chart for 'Cleanliness' and a donut chart for 'Order Accuracy'. The 'Cleanliness' chart shows the following data:

| Response     | Count | %   |
|--------------|-------|-----|
| Excellent    | 8     | 36% |
| Average      | 7     | 32% |
| Good         | 5     | 23% |
| Dissatisfied | 2     | 9%  |

The 'Order Accuracy' chart shows the following data:

| Response     | Count | %   |
|--------------|-------|-----|
| Excellent    | 8     | 36% |
| Good         | 6     | 27% |
| Average      | 4     | 18% |
| Dissatisfied | 4     | 18% |

The 'Report Settings' panel is open, showing the 'GENERAL' tab. The 'Report Title' is 'Restaurant Evaluation Survey'. The 'Show Summary' toggle is turned ON. The 'Report Type' section shows 'Basic' selected. The 'Metric' section is empty.

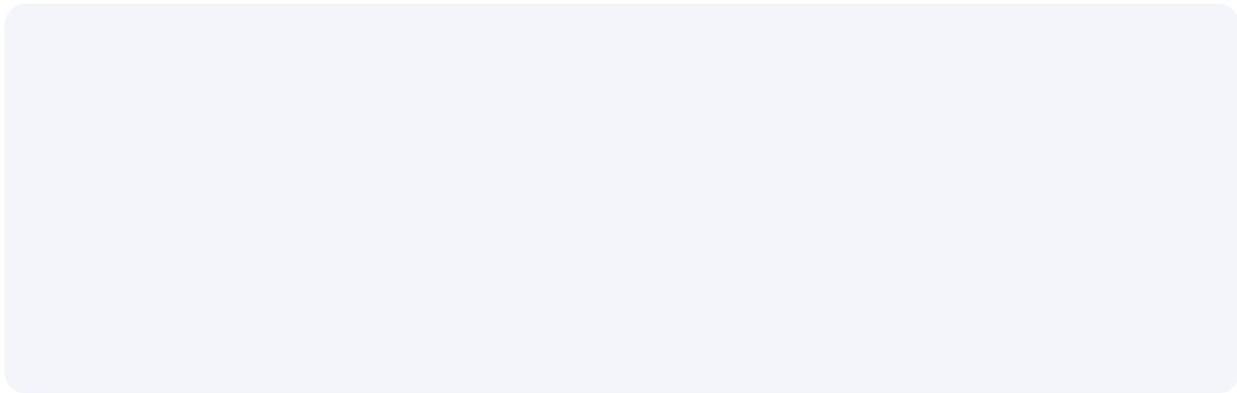
Here, you're able to select a color palette for your report, as well as edit the background color, report page size, and tooltips. For a more in-depth look at how to customize your reports in the Visual Report Builder, check out our help guide: [How to Customize a Visual Report](#).

## Visual Report Builder in action

As you can see, the Visual Report Builder is dynamic, customizable, and extremely versatile. Let's take a look at how an Enterprise client is leveraging it to make waves within their organization.

### One to One Health

Mentioned in the introduction to this chapter, [One to One Health](#) is a workplace healthcare provider delivering primary and acute care to employees, both onsite and remotely. Reporting with Jotform Enterprise has transformed the way One to One Health organizes and uses data. Now, the organization can easily aggregate patient information into tangible, actionable statistics.

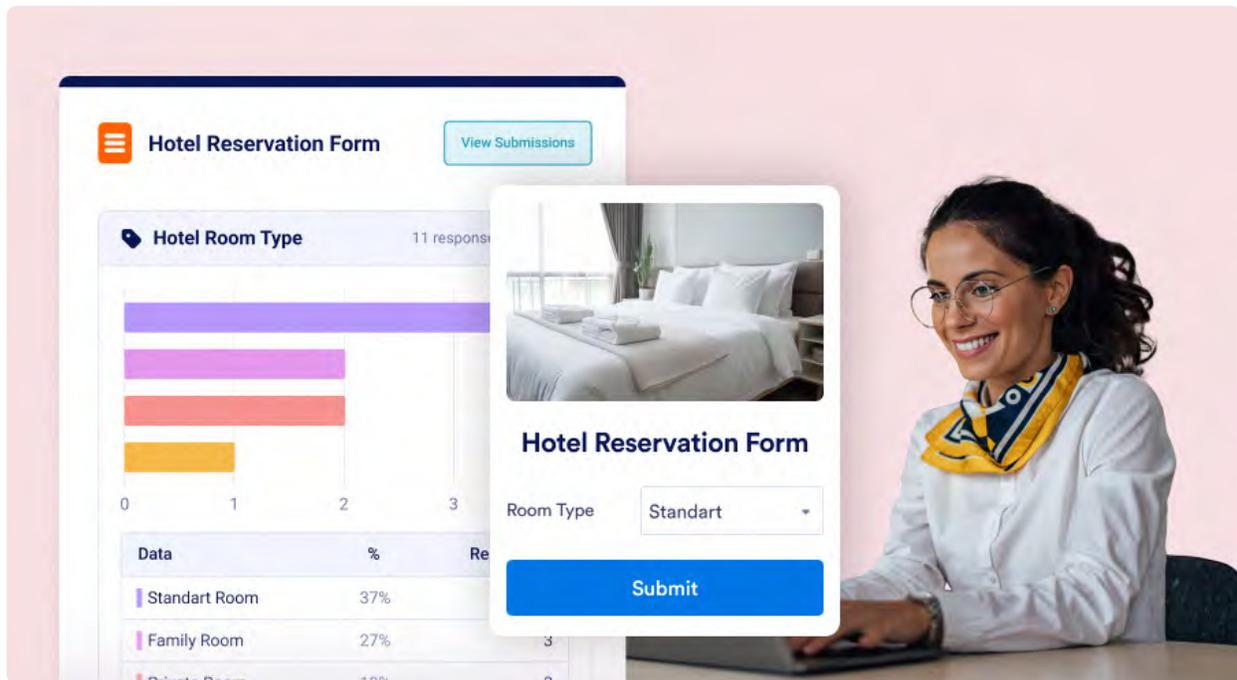


Will Trohanis, chief revenue officer at One to One Health, has been particularly impressed with Jotform Enterprise's lightning-fast report generation. "One client called us at 8 a.m. requesting information to present at their board meeting," he says. "We were able to provide that data in about 30 seconds. Having real-time analytics and metrics available for clients is incredibly powerful."

## Digest Emails

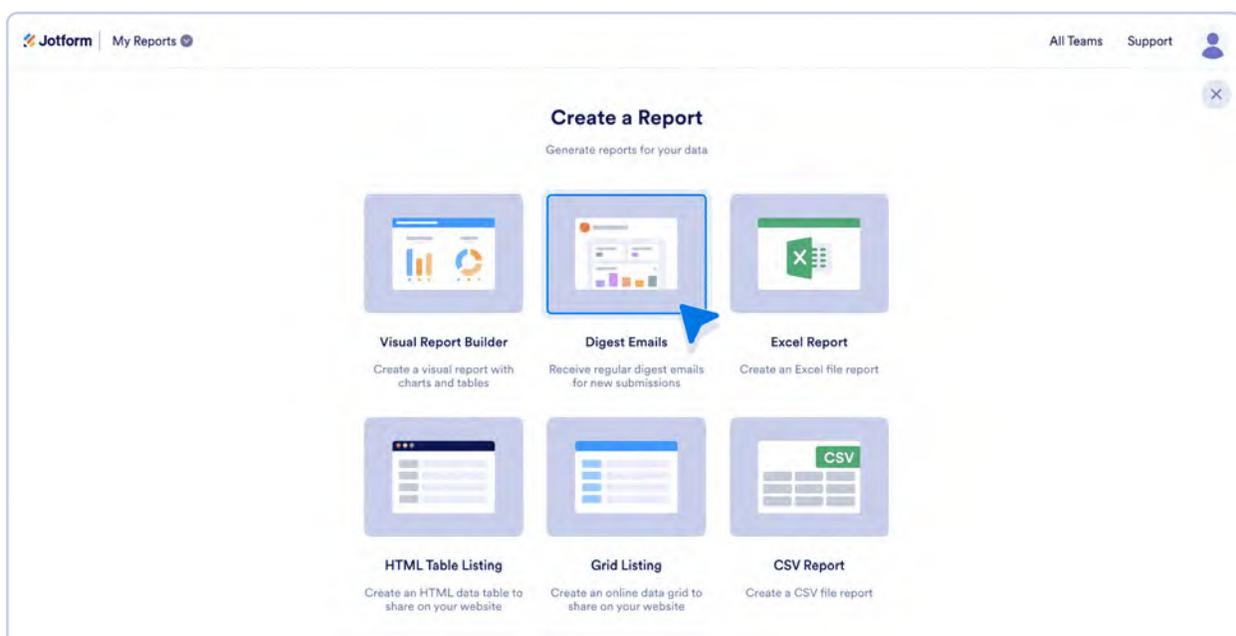
Want to stay up to date with your latest form submission data? What about automatically sending a report to your team with important data collected from your forms? Digest Emails is perfect for this.

With Digest Emails, automatically generated reports can be sent to you, your team, and other important stakeholders. These reports automatically pull from form submission data, create beautiful charts, and go out at a recurring, scheduled time. Save time, and keep your organization in the loop.



## Creating a Digest Email

To begin creating a Digest Email, go to your My Reports page. From here, click Create Report in the top left, and then select **Digest Emails**.



Next, you'll be prompted with some different options for customizing your digest email. You can change the subject of your recurring digest email, as well as the recipients and date settings. As an Enterprise customer, you're able to add an unlimited number of recipients to your digest email. You can also use distribution lists for emails to easily send digests across teams.

In the **Date Settings** section, you're able to customize when and how often your digest email is sent out. Choose from different daily, weekly, and monthly schedules.

All of these settings can be changed at any time, so don't worry about locking anything in!

**Create a Digest**

Receive regular digest emails for new submissions

**Email Settings**

Subject

New Digest

**Recipients**

To: Add more...

**Date Settings**

Repeats

Daily Weekly Monthly

Send Date

Monday - Friday

Send Time

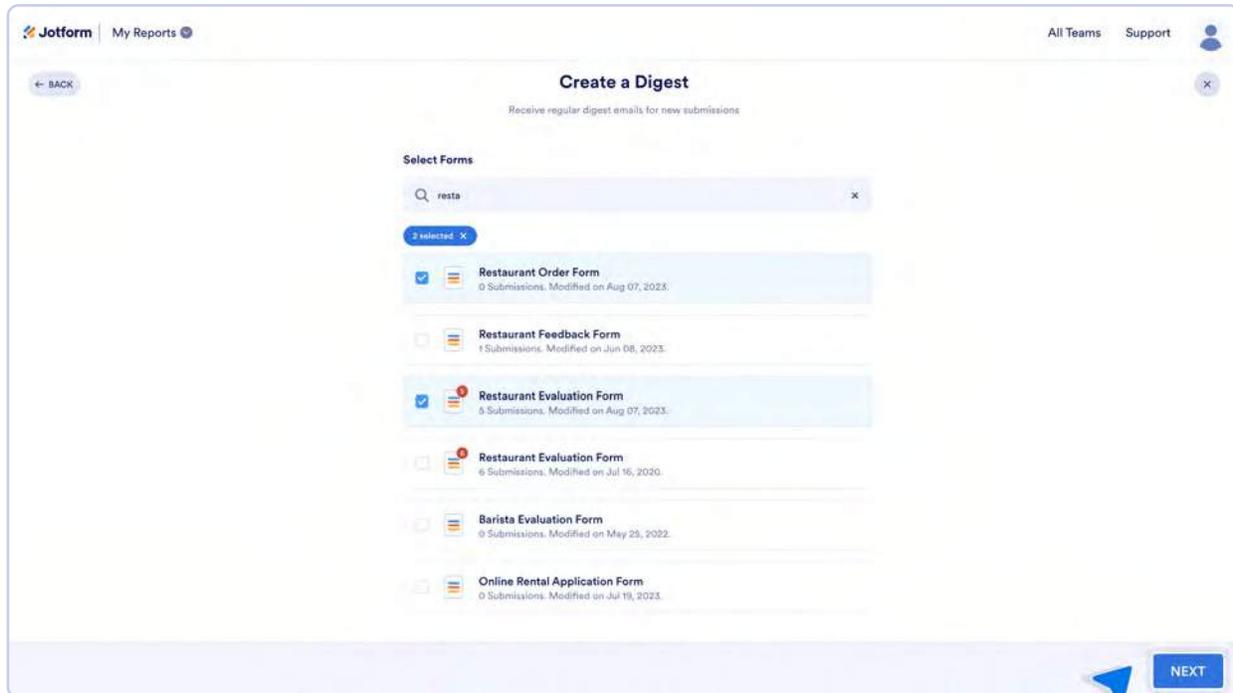
9:00 AM

Time Zone

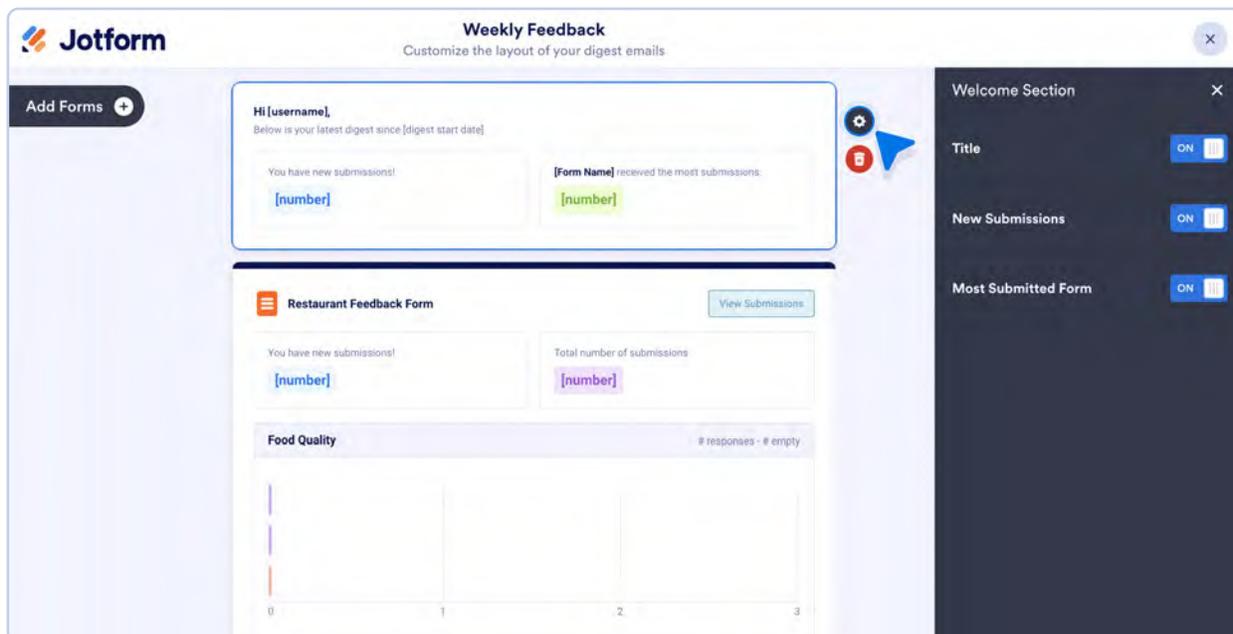
Chicago (GMT-06:00)

After completing your digest email's initial customization settings, you'll be prompted to select the forms from which you would like to pull data. Digest emails can pull data and create reports from multiple forms, allowing you to synchronize data from different sources into one concise email summary.

Once you've selected all your desired forms, click the Next button in the bottom right.

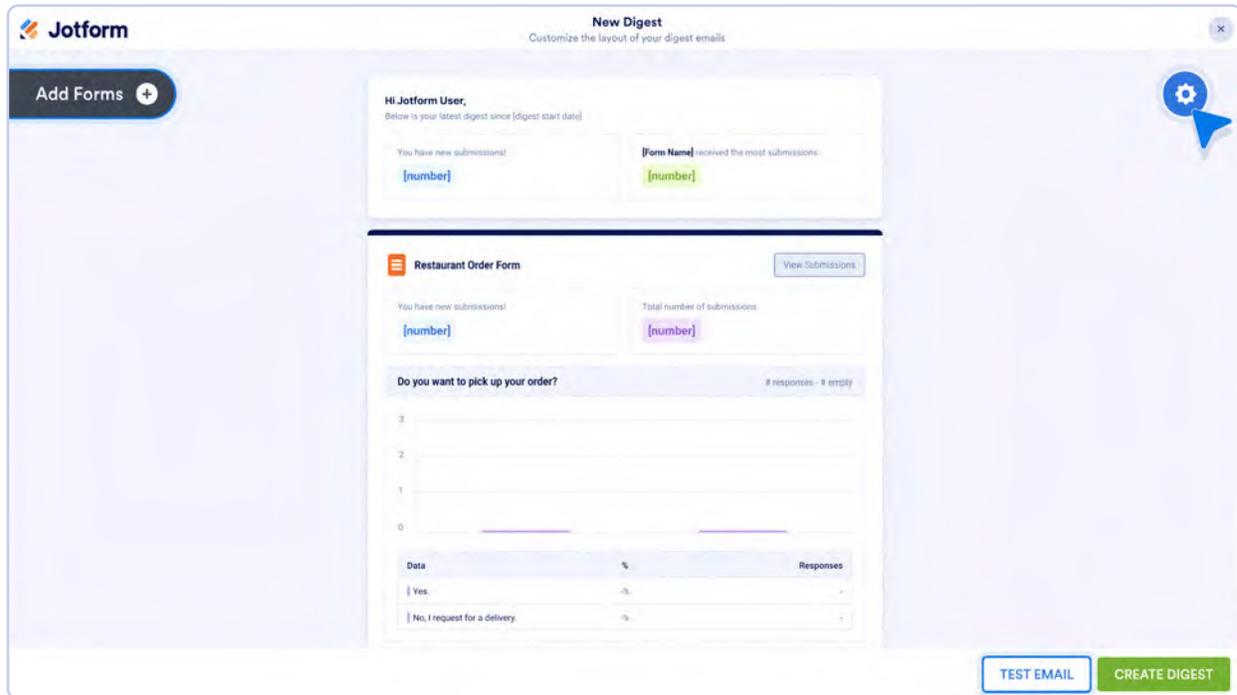


After clicking Next, you'll see a digest email mockup. Here, you can customize how you would like your email to look and what information you would like it to include. To access customization options for each section of your digest email, click on a section, then click on the small gear icon.



To learn more about customizing your digest email, check out our help guide: [How to Personalize Your Digest Emails](#).

When customizing your email mockup, you can also modify the initial email settings by clicking the gear icon on the right, as well as add forms by clicking the **Add Forms** button on the left. When you're happy with how your email looks, you can send a test email by clicking the **Test Email** button in the bottom right.



To finalize your digest email, click **Create Digest** in the bottom right.

## Excel Report

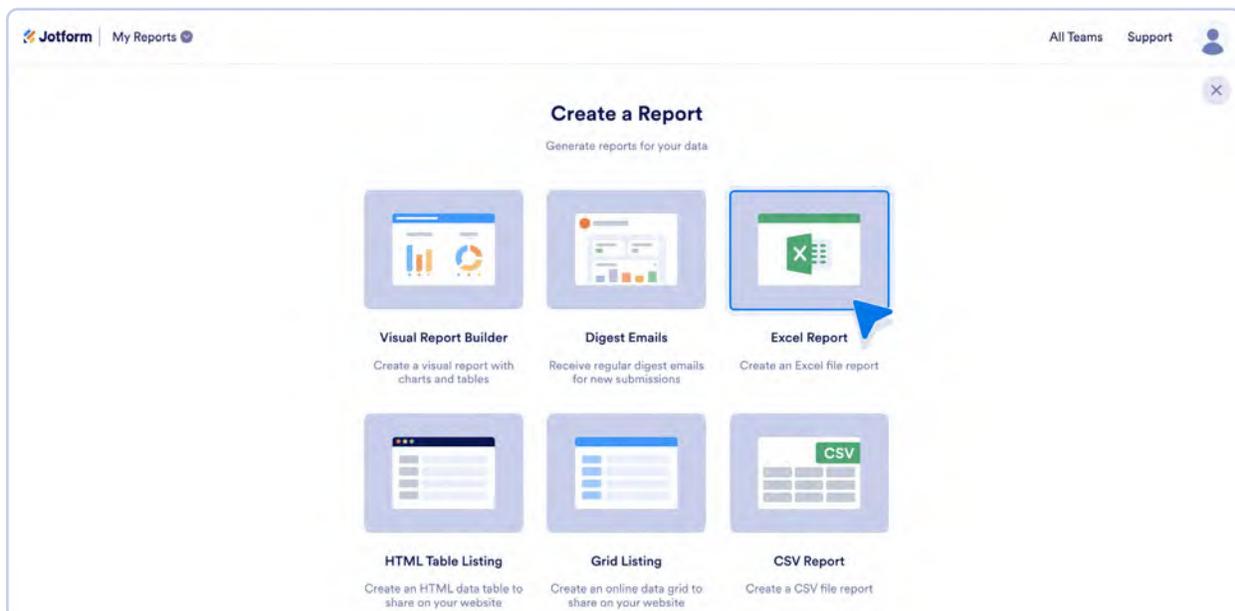
You may be familiar with the option to export data to Excel in Jotform Tables. So what's the difference here? The benefit of using this Excel Report is that it allows you to easily choose the data or columns to include.

The generated Excel Report can be opened with any compatible application, including Google Sheets, Microsoft Office, Libre Calc, and any other Excel alternative.

|    | C                   | D            | E                   | F             | G                        | H            | I               | J            |
|----|---------------------|--------------|---------------------|---------------|--------------------------|--------------|-----------------|--------------|
| 1  | Submission Date     | Day Visited: | Dine In / Take Out: | Food Quality: | Overall Service Quality: | Cleanliness: | Order Accuracy: | Speed:       |
| 2  | 2023-09-05 16:23:00 | 09-05-2023   |                     |               |                          |              |                 |              |
| 3  | 2023-09-05 16:22:48 | 09-05-2023   | Dine In             | Average       |                          |              |                 |              |
| 4  | 2023-08-07 11:08:33 | 08-16-2023   | Dine In             | Average       | Good                     | Good         | Excellent       | Good         |
| 5  | 2023-08-07 11:08:16 | 08-04-2023   | Dine In             | Good          | Average                  | Excellent    | Good            | Excellent    |
| 6  | 2023-08-07 11:07:49 | 07-13-2023   | Dine In             | Dissatisfied  | Dissatisfied             | Good         | Excellent       | Excellent    |
| 7  | 2023-08-07 11:07:27 | 08-01-2023   | Dine In             | Good          | Average                  | Good         | Excellent       | Average      |
| 8  | 2023-08-07 11:07:09 | 08-07-2023   | Take Out            | Average       |                          | Good         | Average         | Dissatisfied |
| 9  | 2020-07-20 07:42:02 | 07-22-2020   | Dine In             | Good          | Good                     | Excellent    | Excellent       | Average      |
| 10 | 2020-07-20 07:41:59 | 07-08-2020   | Dine In             | Excellent     | Average                  | Good         | Dissatisfied    | Excellent    |
| 11 | 2020-07-09 11:49:05 | 07-17-2020   | Take Out            | Dissatisfied  | Dissatisfied             | Dissatisfied | Dissatisfied    | Dissatisfied |
| 12 | 2020-07-09 11:48:15 | 07-16-2020   | Take Out            | Good          | Good                     | Good         | Good            | Good         |
| 13 | 2020-07-09 11:47:15 | 07-16-2020   | Dine In             | Average       | Average                  | Average      | Average         | Average      |
| 14 | 2020-07-09 11:46:31 | 07-15-2020   | Take Out            | Excellent     | Excellent                | Excellent    | Excellent       | Excellent    |
| 15 | 2020-07-09 11:45:40 | 07-13-2020   | Dine In             | Dissatisfied  | Good                     | Average      | Good            | Excellent    |
| 16 | 2020-07-09 11:44:55 | 07-09-2020   | Dine In             | Average       | Average                  | Average      | Average         | Good         |
| 17 | 2020-07-09 11:42:29 | 07-09-2020   | Dine In             | Average       | Average                  | Average      | Dissatisfied    | Dissatisfied |
| 18 | 2020-07-09 11:42:14 | 07-09-2020   | Dine In             | Dissatisfied  | Dissatisfied             | Average      | Average         | Average      |
| 19 | 2020-07-09 11:41:57 | 07-09-2020   | Dine In             | Good          | Good                     | Excellent    | Excellent       | Average      |
| 20 | 2020-07-09 11:41:40 | 07-09-2020   | Dine In             | Good          | Good                     | Excellent    | Average         | Excellent    |
| 21 | 2020-07-09 11:37:50 | 07-09-2020   | Dine In             | Good          | Good                     | Good         | Good            | Good         |
| 22 | 2020-07-09 11:37:32 | 07-09-2020   |                     | Good          | Good                     | Good         | Good            | Good         |
| 23 | 2020-07-09 11:37:01 | 07-09-2020   | Dine In             | Excellent     | Excellent                | Good         | Excellent       | Good         |
| 24 | 2020-07-09 11:36:39 | 07-09-2020   |                     | Excellent     | Excellent                | Average      | Excellent       | Good         |
| 25 | 2020-07-09 11:34:55 | 07-09-2020   |                     | Excellent     | Excellent                |              |                 |              |

## Generating an Excel Report

To begin generating an Excel Report, go to your My Forms page. From there, select the form you would like to generate an Excel Report from. Next, click Reports at the top of the screen, then click Add New Report. Select **Excel Report**.



You'll be prompted to name your report, as well as choose which form fields you want to include. Here, you can also password protect your form for an extra layer of security. After customizing your Excel report to your liking, click the Create button in the bottom right.

A popup window confirming the creation of your report will open. From here, you can download the report and share it via the provided link.

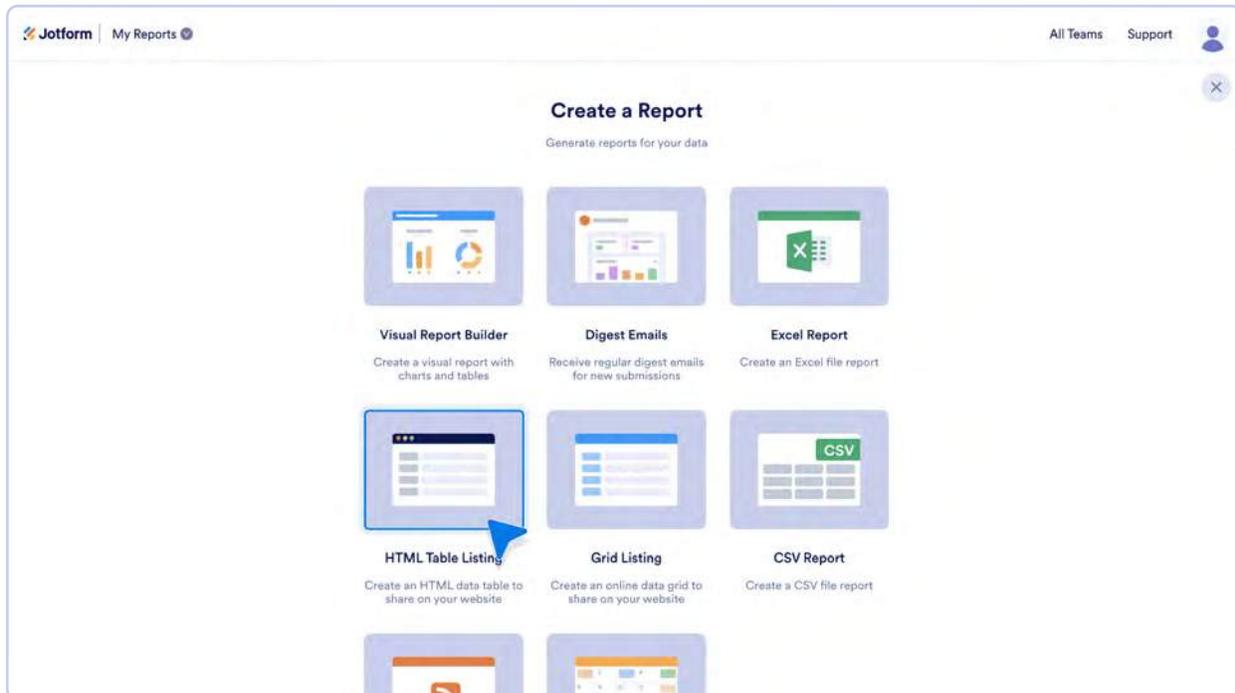
## HTML Table Listing

HTML Table Listings are online reports that showcase form submission data in a clear, concise table format. With sortable columns, embed capabilities, and file upload thumbnails, these reports are great for quickly viewing form submissions online.

| IP | Submission ID | Submission Date        | Day Visited | Dine In / Take Out | Food Quality | Overall Service Quality | Cleanliness  | Order Accuracy | Speed of Service | Value        | Overall Experience | Any comments, questions or suggestions? |
|----|---------------|------------------------|-------------|--------------------|--------------|-------------------------|--------------|----------------|------------------|--------------|--------------------|---|
|    |               | 2020-07-20<br>07:42:02 | 07-22-2020  | Dine In            | Good         | Good                    | Excellent    | Excellent      | Average          | Good         | Good               | -                                       |
|    |               | 2020-07-20<br>07:41:59 | 07-08-2020  | Dine In            | Excellent    | Average                 | Good         | Dissatisfied   | Excellent        | Average      | Good               | Use fresh fish not frozen!!             |
|    |               | 2020-07-09<br>11:49:05 | 7-17-2020   | Take Out           | Dissatisfied | Dissatisfied            | Dissatisfied | Dissatisfied   | Dissatisfied     | Dissatisfied | Average            | -                                       |
|    |               | 2020-07-09<br>11:48:15 | 7-16-2020   | Take Out           | Good         | Good                    | Good         | Good           | Good             | Good         | Good               | -                                       |
|    |               | 2020-07-09<br>11:47:15 | 7-16-2020   | Dine In            | Average      | Average                 | Average      | Average        | Average          | Average      | Good               | -                                       |
|    |               | 2020-07-09<br>11:46:31 | 7-15-2020   | Take Out           | Excellent    | Excellent               | Excellent    | Excellent      | Excellent        | Good         | Excellent          | -                                       |
|    |               | 2020-07-09<br>11:45:40 | 7-13-2020   | Dine In            | Dissatisfied | Good                    | Average      | Good           | Excellent        | Good         | Average            | -                                       |
|    |               | 2020-07-09<br>11:44:55 | 07-09-2020  | Dine In            | Average      | Average                 | Average      | Average        | Good             | Good         | Average            | -                                       |
|    |               | 2020-07-09<br>11:42:29 | 07-09-2020  | Dine In            | Average      | Average                 | Average      | Dissatisfied   | Dissatisfied     | Average      | Dissatisfied       | -                                       |
|    |               | 2020-07-09<br>11:42:14 | 07-09-2020  | Dine In            | Dissatisfied | Dissatisfied            | Average      | Average        | Average          | Dissatisfied | Average            | -                                       |
|    |               | 2020-07-09<br>11:41:57 | 07-09-2020  | Dine In            | Good         | Good                    | Excellent    | Excellent      | Average          | Good         | Excellent          | -                                       |

## Generating an HTML Table Listing

To begin generating an HTML Table Listing, go to your My Forms page. From here, select the form you would like to use to generate an HTML Table Listing. Next, click Reports at the top of the screen, then click Add New Report. Select **HTML Table Listing**.



You'll go directly to the report setup page. Here, you can name your report, choose which form fields you would like to be displayed, and configure your report. HTML Table Listings have a few different configuration options:

- **Password protection:** Require a password to access your report.
- **Display photo instead of a link:** Show image thumbnails instead of hyperlinks.
- **Show edit URLs:** Allow users to edit submissions. This will add a new column containing submission editing links.
- **Show edit URLs to open in same frame:** Open edit URLs in the same window. By default, submission edit links open in a new window.

← BACK

### HTML Table Listing

Select the fields to include in your report.

**REPORT NAME**

Restaurant Evaluation Form - HTML Table Listing

**FIELDS**  Select All

|  |   |
|--|---|
| <input checked="" type="checkbox"/> Submission ID                          | <input checked="" type="checkbox"/> Submission Date     |
| <input checked="" type="checkbox"/> Submission IP                          | <input checked="" type="checkbox"/> Day Visited:        |
| <input checked="" type="checkbox"/> Dine In / Take Out:                    | <input checked="" type="checkbox"/> Food Quality:       |
| <input checked="" type="checkbox"/> Overall Service Quality:               | <input checked="" type="checkbox"/> Cleanliness:        |
| <input checked="" type="checkbox"/> Order Accuracy:                        | <input checked="" type="checkbox"/> Speed of Service:   |
| <input checked="" type="checkbox"/> Value:                                 | <input checked="" type="checkbox"/> Overall Experience: |
| <input checked="" type="checkbox"/> Any comments, questions or suggesti... | <input checked="" type="checkbox"/> Name: (optional)    |
| <input checked="" type="checkbox"/> Age:                                   | <input checked="" type="checkbox"/> E-mail: (optional)  |

**REPORT CONFIGURATIONS**

- Password protection
- Display photo instead of a link
- Show edit URLs
- Show edit URLs to open in same frame

Create

After customizing your HTML Table Listing, click Create in the bottom right corner. Afterward, a popup will open with a shareable link to your report and an iFrame code for embedding your report online.

When the option for showing edit URLs is checked, but the last option is left unchecked, the edit submission link will open in a new window by default.

If the **Show edit URLs to open in same frame** option is checked, that link's text changes from **Edit Submission** to **Edit Submission Link in Same Frame**, and clicking on it will open it in the current window.

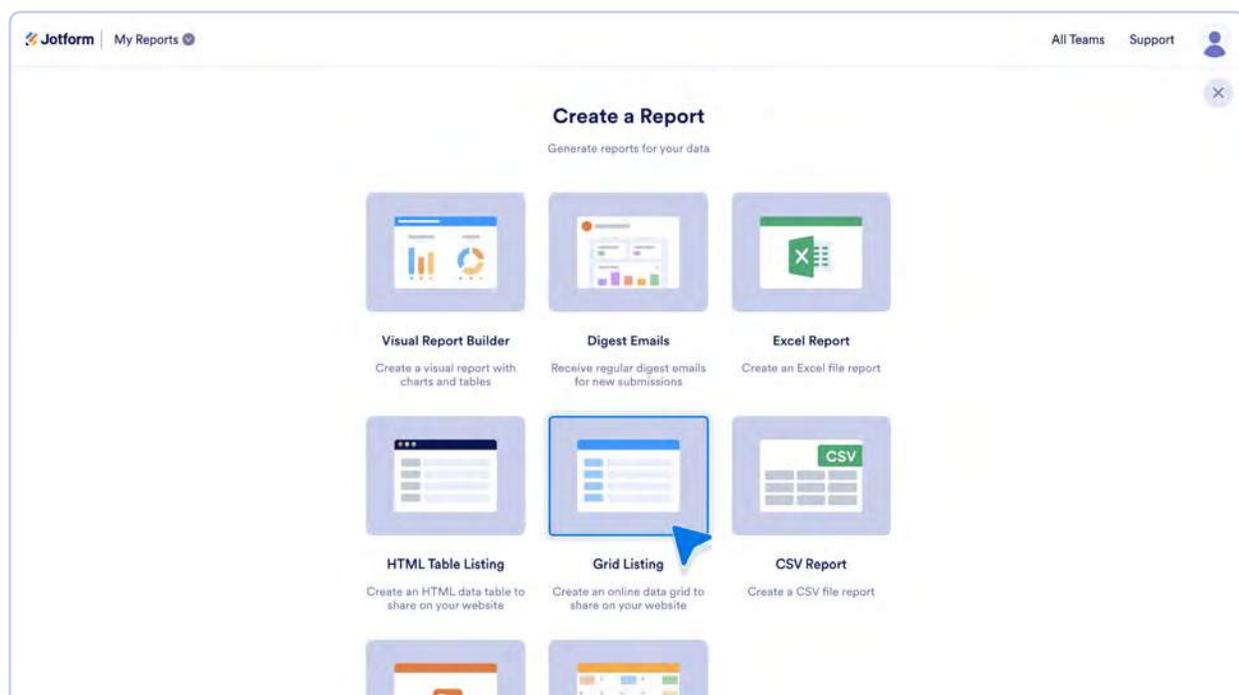
## Grid Listing

Like HTML Table Listings, Grid Listings are online reports showcasing form submission data in a table format. Grid Listings come with more functionality than HTML Table Listings, including a search function and the ability to rearrange, resize, and modify columns. These reports are a more flexible alternative to HTML Table Listings and are great for quickly viewing form submissions online.

| ID | Submission Date     | IP | Day Visited: | Dine In / Take Out: | Food Quality: | Overall Service Quality: | Cleanliness: | Order Accuracy: | Speed of Service: | Value:       |
|----|---------------------|----|--------------|---------------------|---------------|--------------------------|--------------|-----------------|-------------------|--------------|
|    | 2020-07-09 11:42:29 |    | 07-09-2020   | Dine In             | Average       | Average                  | Average      | Dissatisfied    | Dissatisfied      | Average      |
|    | 2020-07-09 11:49:05 |    | 7-17-2020    | Take Out            | Dissatisfied  | Dissatisfied             | Dissatisfied | Dissatisfied    | Dissatisfied      | Dissatisfied |
|    | 2020-07-20 07:41:59 |    | 07-09-2020   | Dine In             | Excellent     | Average                  | Good         | Dissatisfied    | Excellent         | Average      |
|    | 2020-07-09 11:37:32 |    | 07-09-2020   |                     | Good          | Good                     | Good         | Good            | Good              | Good         |
|    | 2020-07-08 20:00:41 |    | 07-09-2020   | Dine In             | Excellent     | Excellent                | Excellent    | Good            | Good              | Average      |
|    | 2020-07-09 11:42:14 |    | 07-09-2020   | Dine In             | Dissatisfied  | Dissatisfied             | Average      | Average         | Average           | Dissatisfied |
|    | 2020-07-09 11:45:40 |    | 7-13-2020    | Dine In             | Dissatisfied  | Good                     | Average      | Good            | Excellent         | Good         |
|    | 2020-07-09 05:59:10 |    | 07-09-2020   |                     | Dissatisfied  | Dissatisfied             | Dissatisfied | Excellent       | Good              | Good         |
|    | 2020-07-09 11:48:15 |    | 7-16-2020    | Take Out            | Good          | Good                     | Good         | Good            | Good              | Good         |
|    | 2020-07-09 11:41:40 |    | 07-09-2020   | Dine In             | Good          | Good                     | Excellent    | Average         | Excellent         | Good         |
|    | 2020-07-20 07:42:02 |    | 07-22-2020   | Dine In             | Good          | Good                     | Excellent    | Excellent       | Average           | Good         |
|    | 2020-07-09 11:44:55 |    | 07-09-2020   | Dine In             | Average       | Average                  | Average      | Average         | Good              | Good         |
|    | 2020-07-09 11:37:50 |    | 07-09-2020   | Dine In             | Good          | Good                     | Good         | Good            | Good              | Good         |
|    | 2020-07-08 20:12:42 |    | 07-09-2020   | Take Out            | Good          | Average                  | Excellent    | Good            | Average           | Dissatisfied |
|    | 2020-07-09 11:46:31 |    | 7-15-2020    | Take Out            | Excellent     | Excellent                | Excellent    | Excellent       | Excellent         | Good         |
|    | 2020-07-08 20:12:15 |    | 07-08-2020   | Dine In             | Excellent     | Excellent                | Excellent    | Excellent       | Excellent         | Good         |
|    | 2020-07-09 11:41:57 |    | 07-09-2020   | Dine In             | Good          | Good                     | Excellent    | Excellent       | Average           | Good         |
|    | 2020-07-09 05:58:39 |    | 07-09-2020   | Dine In             | Average       | Dissatisfied             | Average      | Dissatisfied    | Dissatisfied      | Dissatisfied |
|    | 2020-07-09 11:34:55 |    | 07-09-2020   |                     | Excellent     | Excellent                |              |                 |                   |              |
|    | 2020-07-09 11:36:39 |    | 07-09-2020   |                     | Excellent     | Excellent                | Average      | Excellent       | Good              | Good         |
|    | 2020-07-09 11:37:01 |    | 07-09-2020   | Dine In             | Excellent     | Excellent                | Good         | Excellent       | Good              | Excellent    |
|    | 2020-07-09 11:47:15 |    | 7-16-2020    | Dine In             | Average       | Average                  | Average      | Average         | Average           | Average      |
|    | 2020-07-09 05:59:41 |    | 07-09-2020   | Dine In             | Excellent     | Excellent                | Excellent    | Excellent       | Excellent         | Excellent    |

## Generating a Grid Listing

To begin generating a Grid Listing, go to My Forms. From there, select the form you would like to generate a Grid Listing from. Next, click Reports at the top of the screen, then click Add New Report. Select **Grid Listing**.



You'll be taken to the report setup page where you can name your report, choose which form fields you would like to be displayed, and configure the report. Grid Listings have a few different configuration options:

- **Password protection:** Require a password to access your report.
- **Display photo instead of a link:** Show image thumbnails instead of hyperlinks.
- **Show edit URLs:** Enable submission editing. This will add a new column containing submission editing links.
- **Show edit URLs to open in same frame:** Open edit URLs in the same window. By default, submission edit links open in a new window.
- **Auto-fit grid report to window:** Set the report to auto-size based on the viewer's browser window size.

The screenshot shows the report configuration interface. At the top, there are two columns of form fields to be included in the report, each with a checked checkbox:

- Overall Service Quality:
- Cleanliness:
- Order Accuracy:
- Speed of Service:
- Value:
- Overall Experience:
- Any comments, questions or suggesti...:
- Name: (optional):
- Age:
- E-mail: (optional):

Below this is a section titled 'REPORT CONFIGURATIONS' with five options, all of which are unchecked:

- Password protection
- Display photo instead of a link
- Show edit URLs
- Show edit URLs to open in same frame
- Auto-fit grid report to window

At the bottom of the configuration section, there is a 'Grid Cell Maximum Height' field set to '100px'. A blue arrow points to the 'Auto-fit grid report to window' option. At the bottom right of the page is a 'Create' button.

When the option for showing edit URLs is checked but the last option is left unchecked, the edit submission link will open in a new window by default.

If the **Show edit URLs to open in same frame** option is checked, that link's text changes from **Edit Submission** to **Edit Submission Link in Same Frame**, and clicking on it will open it in the current window.

After customizing your Grid Listing, click Create in the bottom right corner. A popup containing a shareable link to your report and an iFrame code for embedding your report online will open.

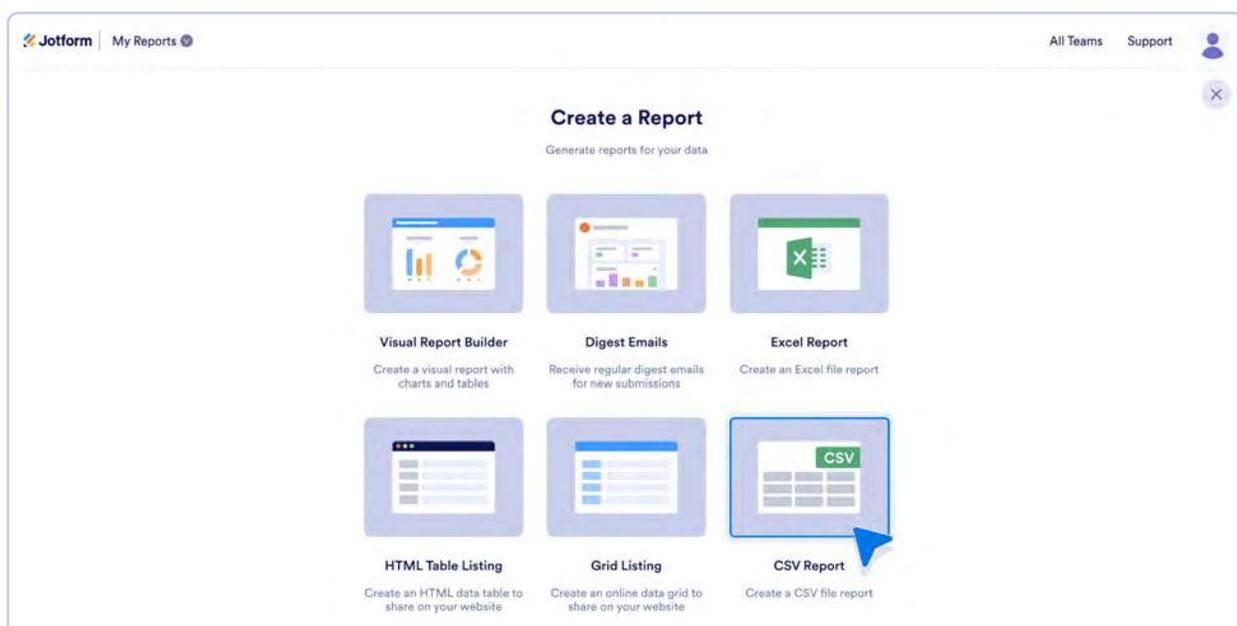
## CSV Report

CSV Reports are great for transporting raw datasets, whether you're moving data between applications, or sharing it with developers. Simpler than an Excel file, a CSV Report is a plain text file organized into a spreadsheet format. Exporting CSV Reports from your Jotform Enterprise submission data is simple. Let's look at how to do it.

| IP           | Submission ID | Submission Date     | Day Visited: | Dine In / Take Out: | Food Quality: | Overall Service Quality: | Cleanliness: | Order Accuracy: | Speed of Service: | Value:       | Overall Experience: |
|--------------|---------------|---------------------|--------------|---------------------|---------------|--------------------------|--------------|-----------------|-------------------|--------------|---------------------|
| 192.168.1.1  | 123456789     | 2020-07-20 07:42:02 | 07-22-2020   | Dine In             | Good          | Good                     | Excellent    | Excellent       | Average           | Good         | Good                |
| 192.168.1.2  | 123456790     | 2020-07-20 07:41:59 | 07-08-2020   | Dine In             | Excellent     | Average                  | Good         | Dissatisfied    | Excellent         | Average      | Good                |
| 192.168.1.3  | 123456791     | 2020-07-09 11:49:05 | 7-17-2020    | Take Out            | Dissatisfied  | Dissatisfied             | Dissatisfied | Dissatisfied    | Dissatisfied      | Dissatisfied | Average             |
| 192.168.1.4  | 123456792     | 2020-07-09 11:48:15 | 7-16-2020    | Take Out            | Good          | Good                     | Good         | Good            | Good              | Good         | Good                |
| 192.168.1.5  | 123456793     | 2020-07-09 11:47:15 | 7-16-2020    | Dine In             | Average       | Average                  | Average      | Average         | Average           | Average      | Good                |
| 192.168.1.6  | 123456794     | 2020-07-09 11:46:31 | 7-15-2020    | Take Out            | Excellent     | Excellent                | Excellent    | Excellent       | Excellent         | Good         | Excellent           |
| 192.168.1.7  | 123456795     | 2020-07-09 11:45:40 | 7-13-2020    | Dine In             | Dissatisfied  | Good                     | Average      | Good            | Excellent         | Good         | Average             |
| 192.168.1.8  | 123456796     | 2020-07-09 11:44:55 | 07-09-2020   | Dine In             | Average       | Average                  | Average      | Average         | Good              | Good         | Average             |
| 192.168.1.9  | 123456797     | 2020-07-09 11:42:29 | 07-09-2020   | Dine In             | Average       | Average                  | Average      | Dissatisfied    | Dissatisfied      | Average      | Dissatisfied        |
| 192.168.1.10 | 123456798     | 2020-07-09 11:42:14 | 07-09-2020   | Dine In             | Dissatisfied  | Dissatisfied             | Average      | Average         | Average           | Dissatisfied | Average             |
| 192.168.1.11 | 123456799     | 2020-07-09 11:41:57 | 07-09-2020   | Dine In             | Good          | Good                     | Excellent    | Excellent       | Average           | Good         | Excellent           |
| 192.168.1.12 | 123456800     | 2020-07-09 11:41:40 | 07-09-2020   | Dine In             | Good          | Good                     | Excellent    | Average         | Excellent         | Good         | Good                |
| 192.168.1.13 | 123456801     | 2020-07-09 11:37:50 | 07-09-2020   | Dine In             | Good          | Good                     | Good         | Good            | Good              | Good         | Good                |
| 192.168.1.14 | 123456802     | 2020-07-09 11:37:32 | 07-09-2020   |                     | Good          | Good                     | Good         | Good            | Good              | Good         | Good                |
| 192.168.1.15 | 123456803     | 2020-07-09 11:37:01 | 07-09-2020   | Dine In             | Excellent     | Excellent                | Good         | Excellent       | Good              | Excellent    | Excellent           |
| 192.168.1.16 | 123456804     | 2020-07-09 11:36:39 | 07-09-2020   |                     | Excellent     | Excellent                | Average      | Excellent       | Good              | Good         | Good                |
| 192.168.1.17 | 123456805     | 2020-07-09 11:34:55 | 07-09-2020   |                     | Excellent     | Excellent                |              |                 |                   |              |                     |
| 192.168.1.18 | 123456806     | 2020-07-09 05:59:41 | 07-09-2020   | Dine In             | Excellent     | Excellent                | Excellent    | Excellent       | Excellent         | Excellent    | Excellent           |
| 192.168.1.19 | 123456807     | 2020-07-09 05:59:10 | 07-09-2020   |                     | Dissatisfied  | Dissatisfied             | Dissatisfied | Excellent       | Good              | Good         | Dissatisfied        |
| 192.168.1.20 | 123456808     | 2020-07-09 05:58:39 | 07-09-2020   | Dine In             | Average       | Dissatisfied             | Average      | Dissatisfied    | Dissatisfied      | Dissatisfied | Average             |
| 192.168.1.21 | 123456809     | 2020-07-08 20:12:42 | 07-08-2020   | Take Out            | Good          | Average                  | Excellent    | Good            | Average           | Dissatisfied | Good                |
| 192.168.1.22 | 123456810     | 2020-07-08 20:12:15 | 07-08-2020   | Dine In             | Excellent     | Excellent                | Excellent    | Excellent       | Excellent         | Good         | Good                |
| 192.168.1.23 | 123456811     | 2020-07-08 20:00:41 | 07-09-2020   | Dine In             | Excellent     | Excellent                | Excellent    | Good            | Good              | Average      | Good                |

## Generating a CSV Report

To generate a CSV Report, go to My Forms and select the form you would like to use. Next, click Reports at the top of the screen, and then click Add New Report. Finally, select **CSV Report**.

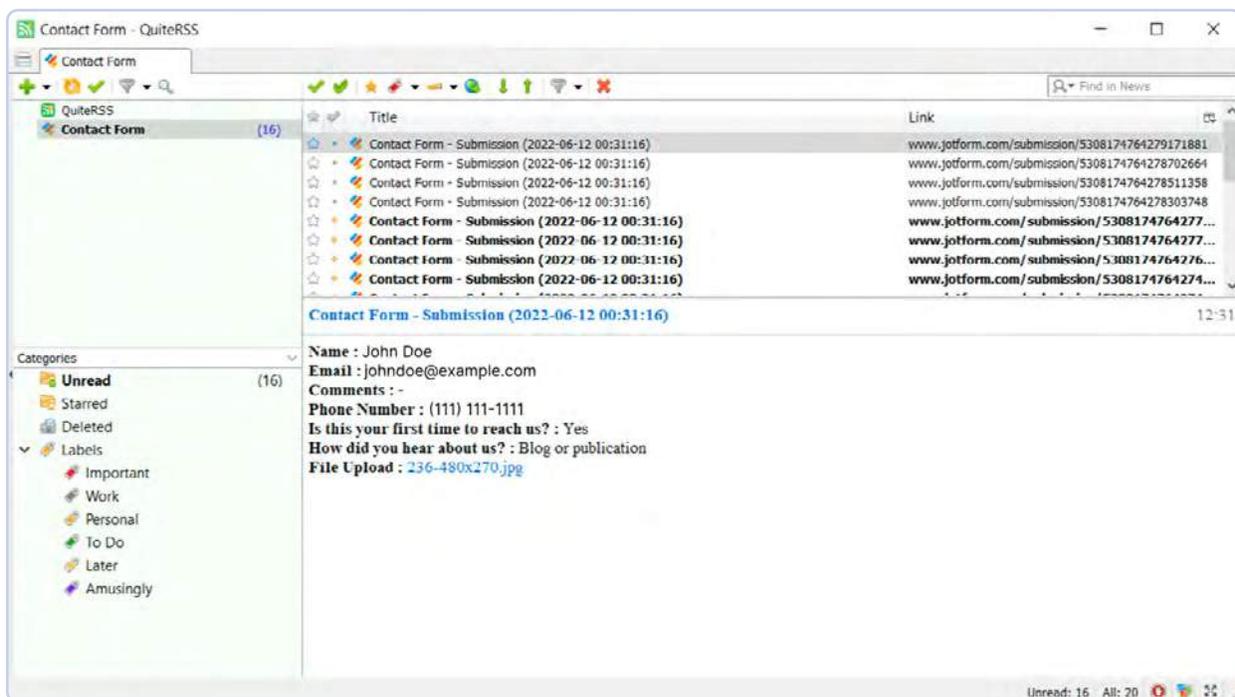


Next, you'll go to the report setup page where you can customize your report name and select which form fields you would like to be in your report. You can also enable password protection for your report, if you want an extra layer of privacy.

After customizing your CSV Report, click the Create button. A popup with a download link for your report will open. This popup will also contain a shareable download link that you can send to team members.

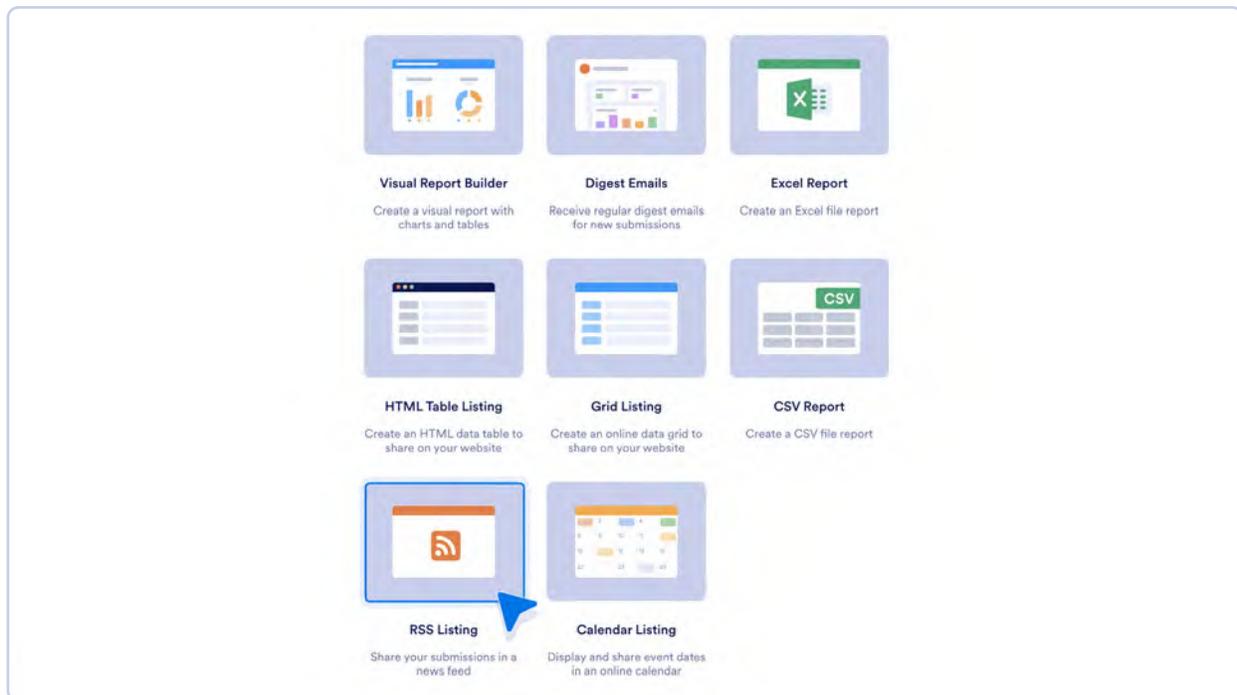
## RSS Listing

Jotform Enterprise can generate RSS feeds that you can use to get notified when there are new entries to your forms. Since RSS is in standard XML format, you can also use it to fetch submission data and use it in many different ways.



## Generating an RSS Listing

To generate an RSS Listing, go to My Forms and select the form you would like to generate an RSS Listing from. Next, click Reports at the top of the screen, and then click Add New Report. Finally, select **RSS Listing**.



You'll be taken to the report setup page. Here, you can customize your report name and select which form fields you want to be in your final RSS Listing. You can also enable password protection for your report for an extra layer of privacy.

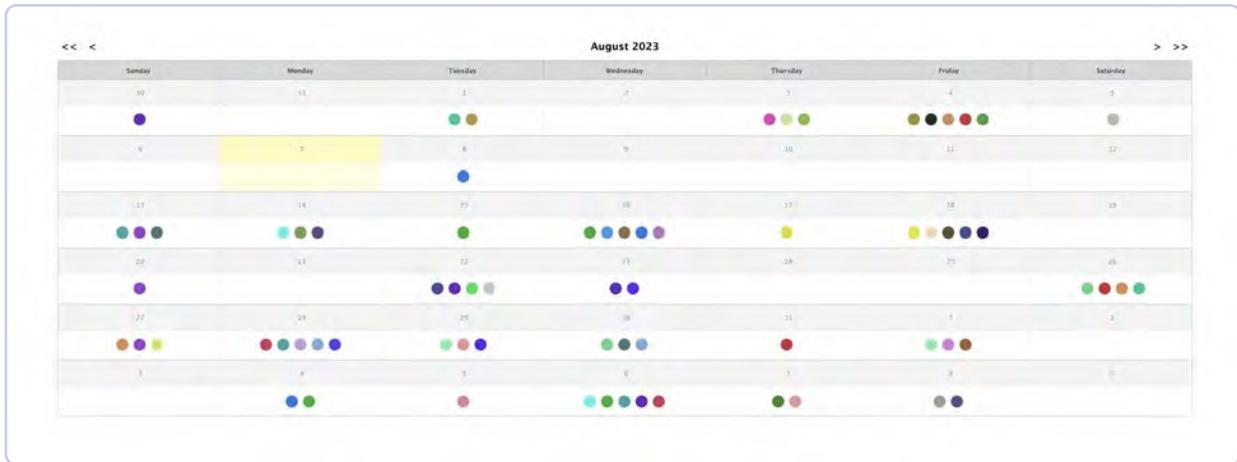
After customizing your RSS Listing, click the Create button. A popup containing a link to your RSS Listing report will open. This report is generated in XML format, and may require an RSS reader to properly view.

Note: To access your password-protected report in your RSS reader or program, append `?passKey={your_password}` to the feed URL. For example

[https://www.jotform.com/rss/230035066350?passKey=MyP\\$\\$\\$w0rd](https://www.jotform.com/rss/230035066350?passKey=MyP$$$w0rd)

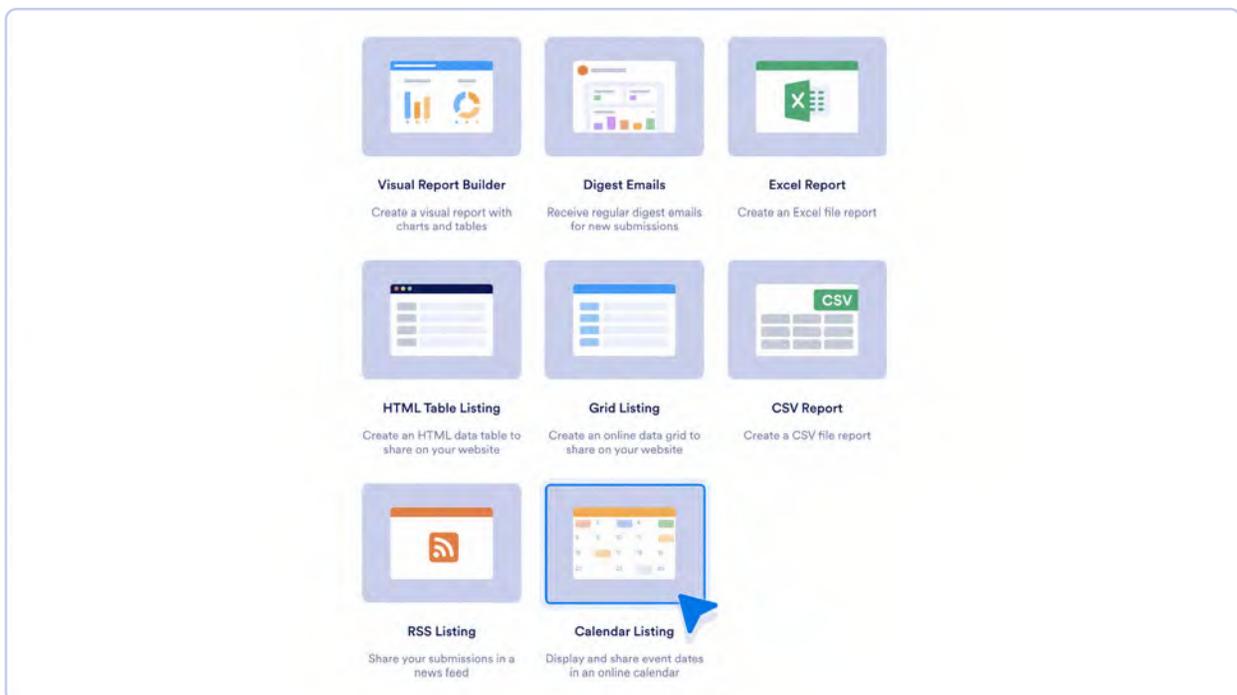
## Calendar Listing

The Calendar Listing report is an online calendar view of your form submission data. This is a great way to see what data was received and when. Each form submission will appear as a dot on the calendar view, and each calendar day can be expanded to view more information about the form submissions from that day. Calendar Listing reports are also hosted online, meaning they can easily be shared via a link with customers and team members.



## Generating a Calendar Listing

To create a Calendar Listing, go to My Forms and select the form you would like to generate a Calendar Listing from. Next, click Reports at the top of the screen, and then click Add New Report. Select **Calendar Listing**.



After selecting Calendar Listing, you'll go to the Calendar Listing setup page where you can customize your report. First, choose a report name. Next, select a date field.

The date field will determine which day on the calendar view your submission data will appear. If you're using a Calendar Listing to track form submission times, it's best to stick with **Submission Date** in the date field. However, if you're planning on using a Calendar Listing report to help plan appointments or events, it may be more beneficial to use a **Date Picker** for your date field.

The screenshot shows the 'Calendar Listing' configuration screen in Jotform. At the top left is a '← BACK' button and at the top right is a close button '×'. The title 'Calendar Listing' is centered, with the instruction 'Select the fields to include in your report.' below it. The interface is divided into three sections: 'REPORT NAME', 'DATE FIELD', and 'FIELDS'. Under 'REPORT NAME', there is a text input field containing 'Restaurant Evaluation Form - Calendar Listing'. Under 'DATE FIELD', there are two radio button options: 'Submission Date' (which is selected) and 'Day Visited:'. Under 'FIELDS', there are ten radio button options arranged in two columns: 'Dine In / Take Out:' (selected), 'Food Quality:', 'Overall Service Quality:', 'Cleanliness:', 'Order Accuracy:', 'Speed of Service:', 'Value:', 'Overall Experience:', 'Any comments, questions or suggesti...', and 'Name: (optional)'.

Finally, select the form fields you would like to include in your Calendar Listing report. You can also enable password protection for your report.

After customizing your Grid Listing, click the Create button. A popup with a shareable link to your report and an iFrame code for embedding your report online will open.

## Diverse real-time reporting for any use case

Using reports with Jotform Enterprise can transform the way your organization leverages data. From building beautiful reports for stakeholders, to tracking form submission data in real time and automatically updating your team with digest emails, there are countless ways to leverage reports to improve your organization's data management and visibility.

## Chapter 13

# Documents and PDFs

When the Portable Document Format, or PDF, was first invented, it was a game-changer. A PDF is a fixed format file, which means it appears the same way on any operating system, screen size, etc. You never have to worry that the formatting will change, and in most cases, it's difficult for someone receiving a PDF to edit it.

But one of the benefits of PDFs is also the root of one of the file format's biggest issues. If you need to fill out a PDF form or sign a PDF contract, it can be difficult. Jotform has solutions that allow you to turn PDFs into online forms, accept e-signatures, and create fully customizable PDFs. Using Jotform Enterprise to create documents and PDFs can streamline your organization's processes and save a ton of time. Melanie Dunlop at Odyssey Charter Schools uses Jotform Enterprise to distribute documents and collect e-signatures in minutes.

**"Jotform Enterprise makes it easy to upload PDFs and documents, create online forms that exactly match the document language, send it out as a link to collect signatures, and store the submission data securely."**

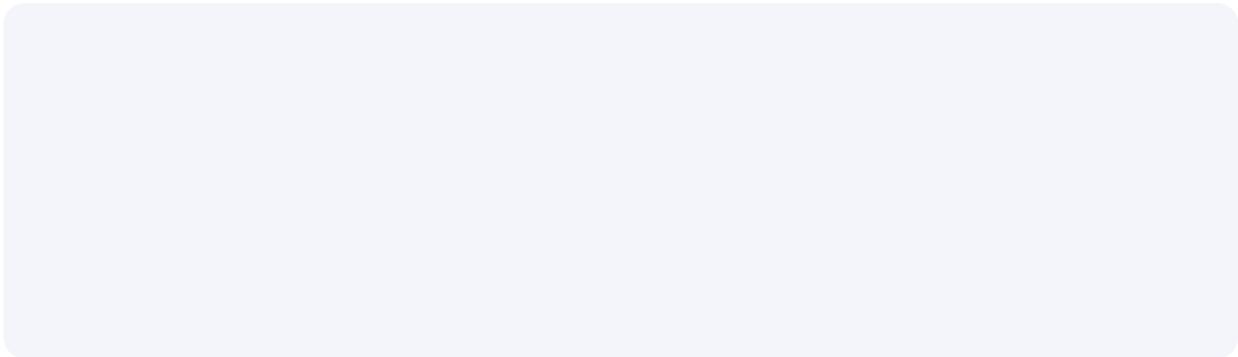
— Melanie Dunlop, Educator and Jotform Enterprise Project Manager,  
**Odyssey Charter Schools**

Let's dig into how Jotform Enterprise can help you with all your organization's PDF needs.

## Turn form submissions into custom designed PDFs

With the Jotform PDF Editor, you can turn your form responses into professional-looking PDFs. For example, if a customer purchases a product or service from your business, you can send them an auto-generated receipt. Likewise, you can use one of Jotform's PDF templates to create invoices. A company accepting online job applications can convert information from application forms into PDFs that can be forwarded to others for review.

Some organizations, particularly in regulated industries, may need to keep PDFs as records. Tony Richman at ACS Stainless Steel Fixings uses Jotform's PDF Editor to automatically create PDFs with branded terms and conditions, to keep records and protect his company.



Because of Jotform's wide array of integrations, users can automatically send generated PDFs to cloud storage as well.

Other use cases for Jotform PDF Editor include

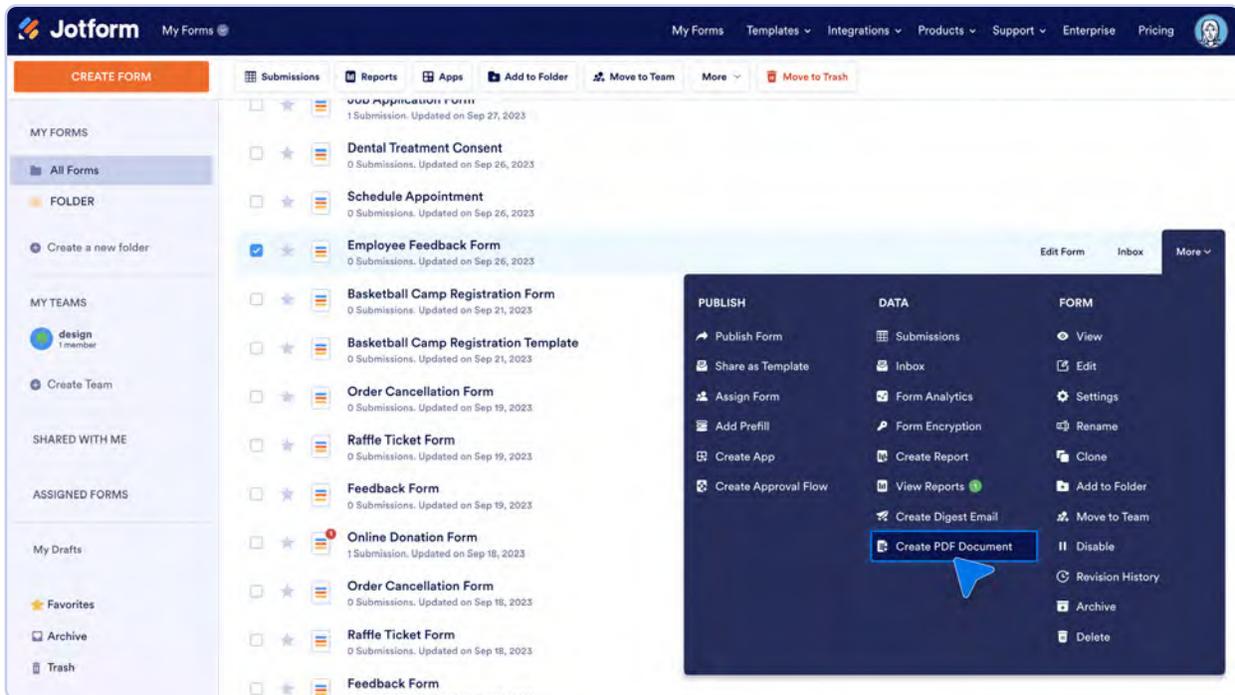
- Health history and intake forms
- Permission slips and waivers
- Inspection and inventory reports
- Government and regulatory forms
- Donor and customer receipts

### PDF Editor

You can start the process of creating a PDF with either a PDF template or with an existing form.

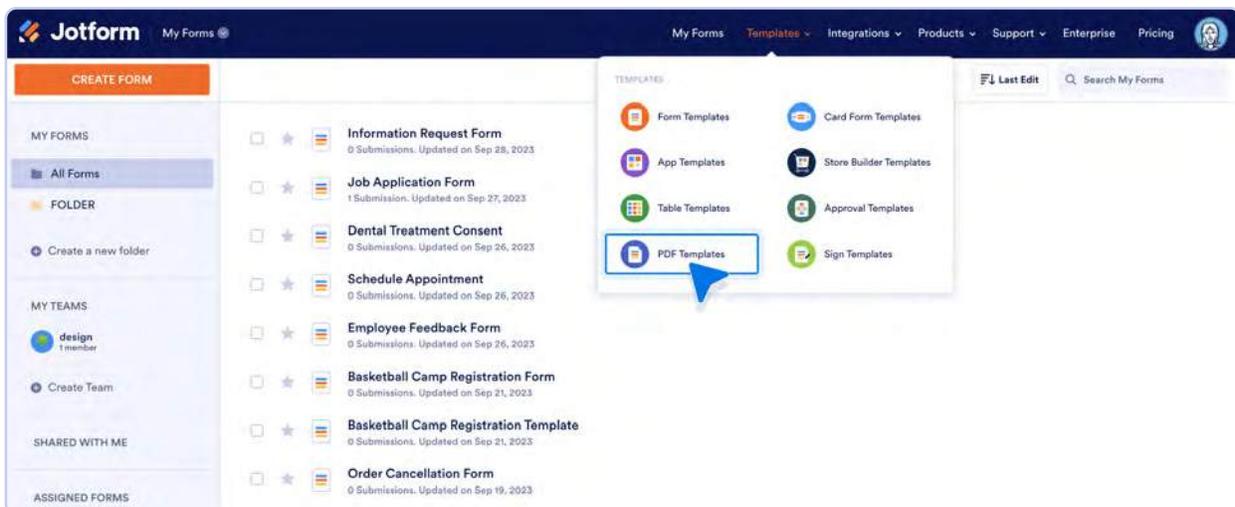
## From an existing form

To create a PDF from an existing form, go to the **My Forms** page and select the form you'd like to turn into a PDF. Then click **More** to open the dropdown menu and click **Create PDF Document**.



## From a template

To create a PDF from a template, go to the **Templates** dropdown menu at the top of Jotform's website and click **PDF Templates**. On our PDF Templates page, you can choose from over 1,300 templates, and you can filter them according to different industries so you can find the template that's right for you.



If you want to preview the PDF before you commit, just hover over the image and click the **Preview** button.

The screenshot shows the Jotform PDF Editor interface for 'Invoice Templates'. The page title is 'Invoice Templates' with a sub-header '53 Templates'. A search bar is at the top left. The main content area displays three template cards:

- Professional Invoice Template:** Features a 'Preview' button and a 'Use Template' button. Description: 'We have prepared a professional invoice PDF template to help you to send invoices in seconds! You can gather the billing...'
- Utility Bill Template:** Features a 'Use Template' button. Description: 'Send a reminder to your customers and make sure all information is available in the statement by using this Utility Bill Template....'
- Simple Invoice Template:** Features a 'Use Template' button. Description: 'You can use this simple PDF invoice template as a guide to make sure you have all the needed information, like how much is being...'

If you want to check out the form template accompanying the PDF to make sure it's right for you, click the **Form Preview** tab.

The screenshot shows the 'Professional Invoice Template' form preview. The form is titled 'Product Order Form' and includes a 'Billing Information' section. The 'My Products' section contains a table with the following data:

| Product                                      | Quantity | Price   | Total   |
|--|----------|---------|---------|
| <input type="checkbox"/> Cotton Male T-shirt | 1        | \$42.00 | \$42.00 |

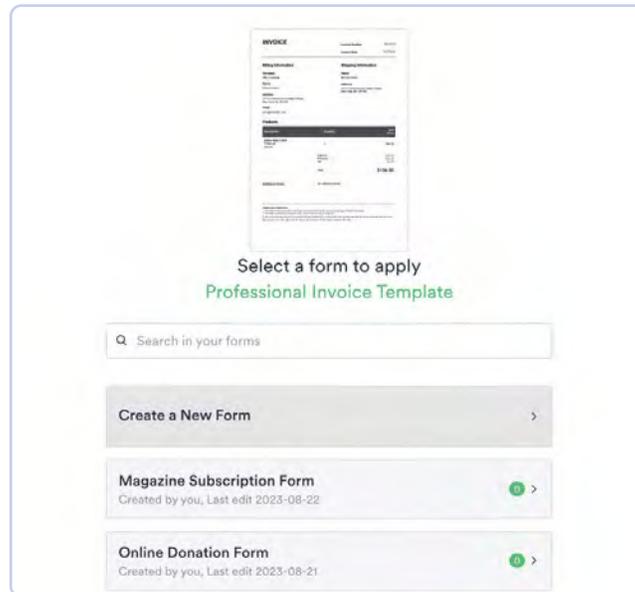
The 'Billing Information' section includes a table with the following data:

|              |               |
|--------------|---------------|
| Subtotal     | \$0.00        |
| Tax          | \$0.00        |
| Shipping     | \$0.00        |
| <b>Total</b> | <b>\$0.00</b> |

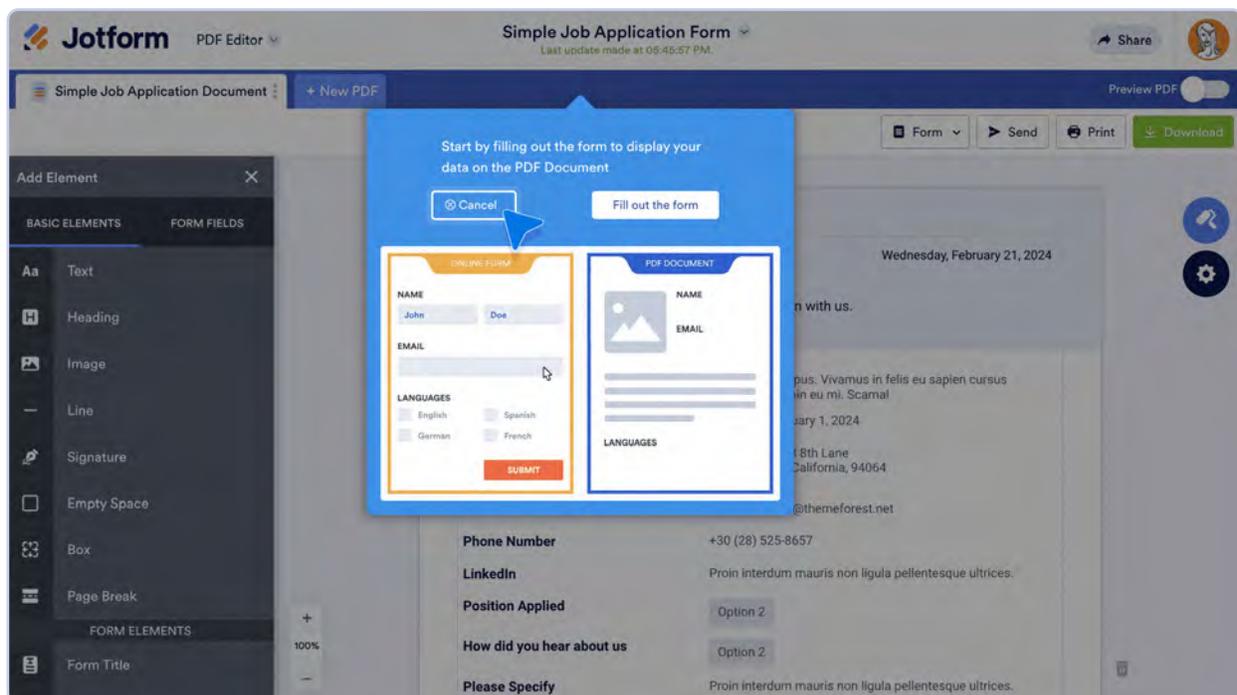
The form also includes a 'FORM PREVIEW' tab and a 'Use Template' button.

## Connect a PDF template to a form

After you select a PDF template, you'll be asked to choose which form you'd like to use. You can either create a new form or use a template.

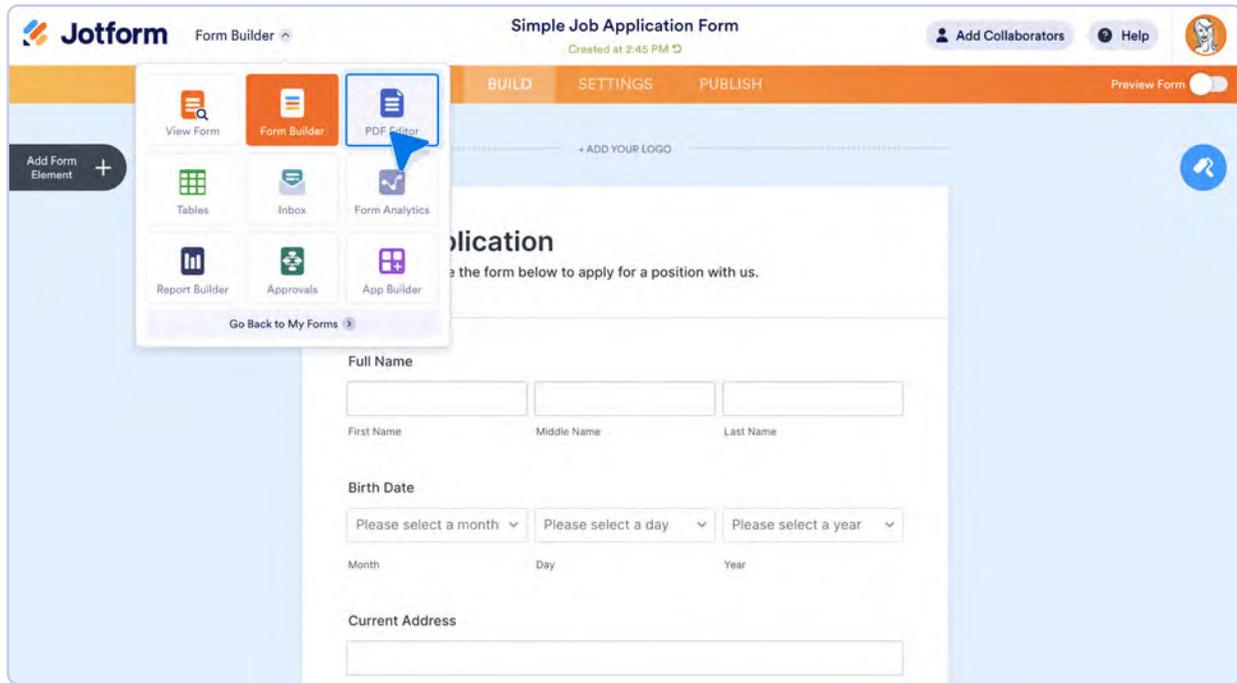


Whether you create a new form from scratch or use a template, you'll be asked to fill out the form to match the form fields to the PDF. We do this as a way for you to test your PDF to make sure the fields are all going to the right places. But if you don't think that will be necessary, feel free to click **Cancel**.

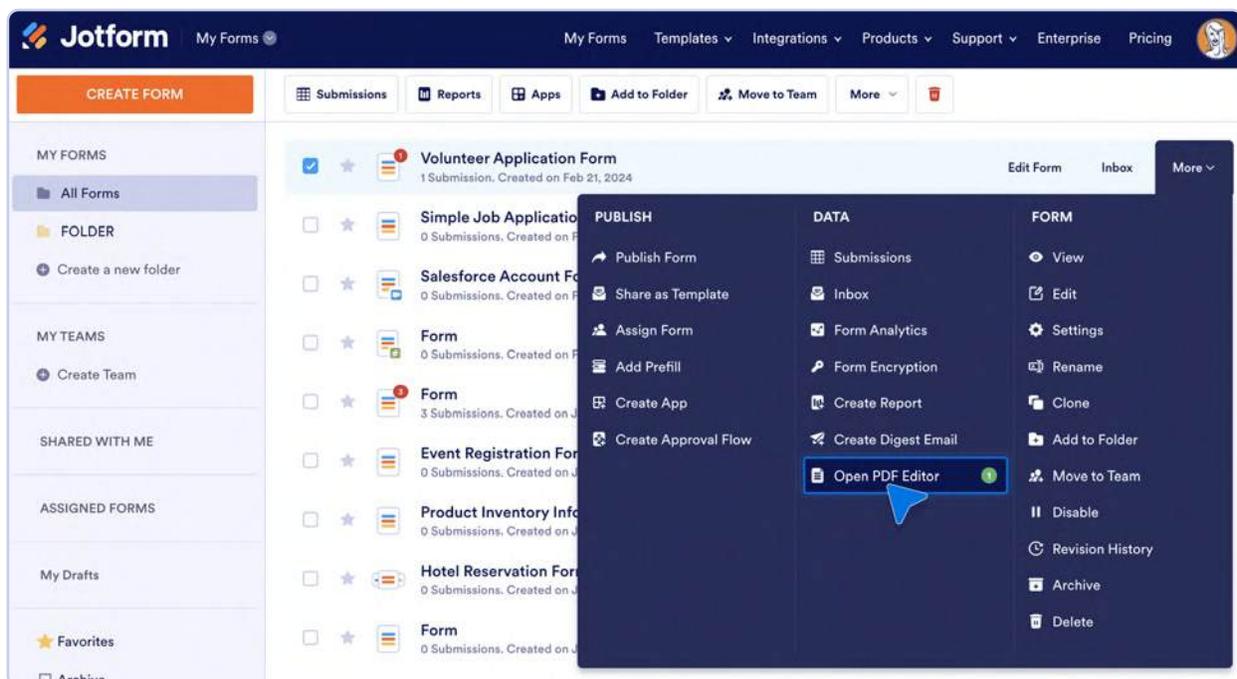


## Create a PDF from your form submissions

To create a PDF from your form submissions, just select the form you'd like to use and then click **PDF Editor** in the dropdown menu above the Form Builder.



Alternatively, from the My Forms page, you can click on the More dropdown to the right of a form and select **Open PDF Editor** under **Data**.



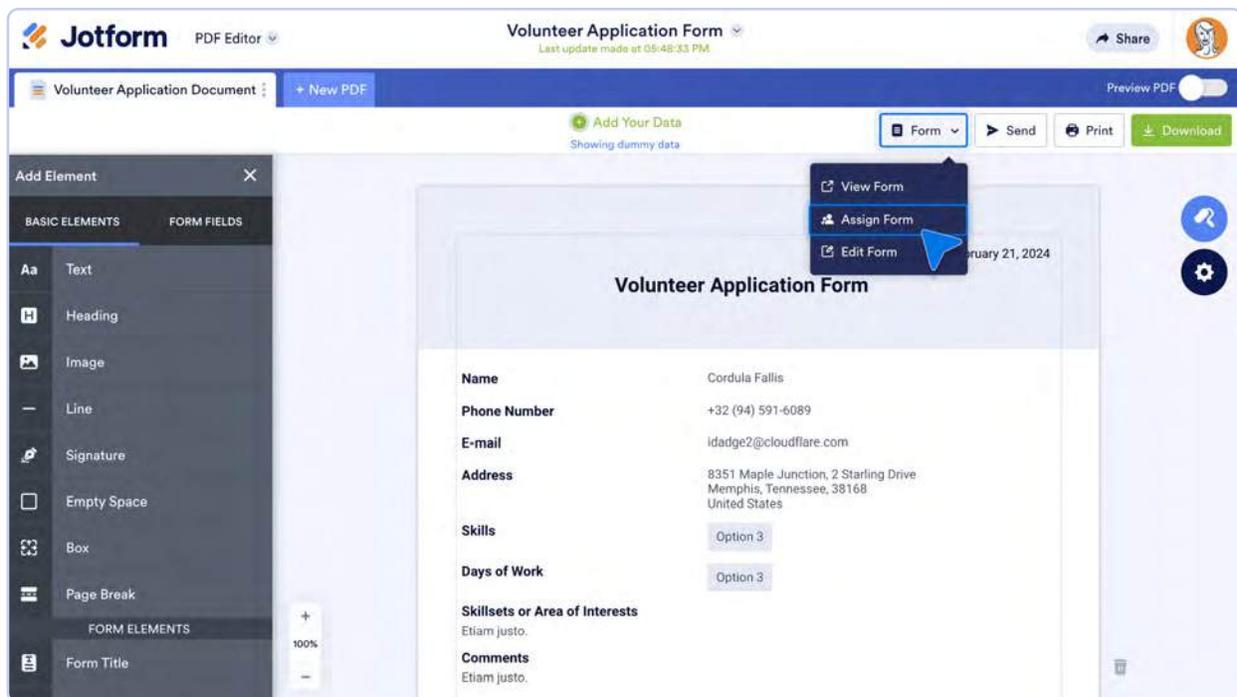
## PDF Editor interface

You might notice that Jotform’s PDF Editor looks very familiar. That’s because we wanted to make it similar to the Form Builder so our users wouldn’t have to worry about learning a new tool. Using the PDF Editor has allowed Melanie Dunlop at Odyssey Charter Schools to create digital versions of paper forms and update them, so the team can easily keep all their information in one place.

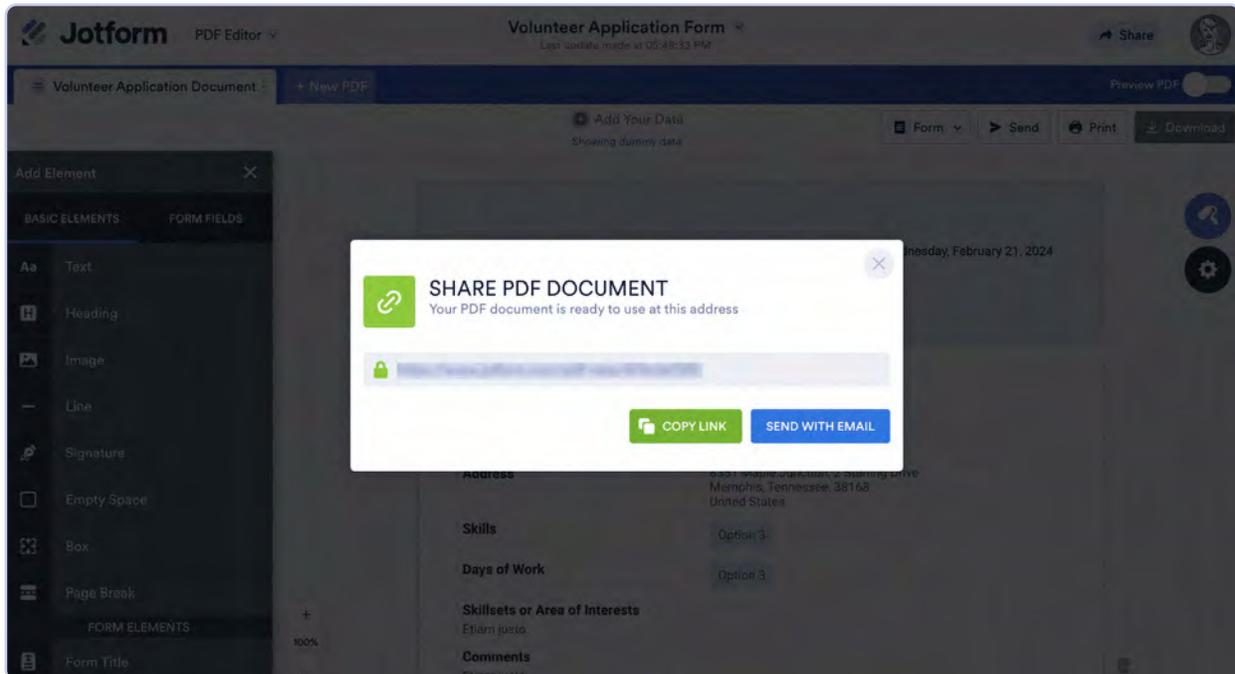
“Using Jotform’s PDF Editor, we can create digital versions of paper forms required by the government to track immunizations, secure time-stamped signatures from parents, nursing staff, and school staff, and keep it all within our registration process. If an audit is required, our nursing staff can easily download or print all necessary data from Jotform. It’s saved a ton of time,” she says.

Just like our Form Builder, all you have to do to add elements to a PDF is drag and drop. The form, send, and sharing features are a little different, though, so let’s go over those.

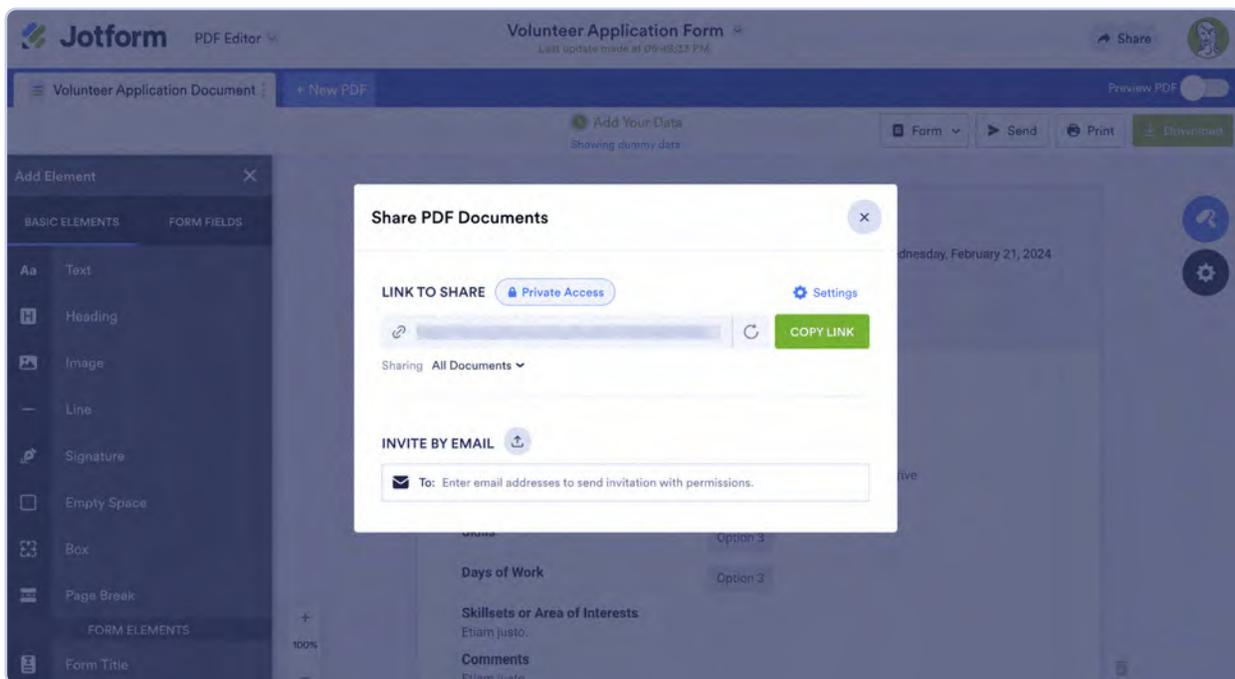
The **Form** dropdown menu (located at the top of the screen toward the right) allows you to easily view the form associated with your PDF. You can also edit the form and assign it to someone to fill out.



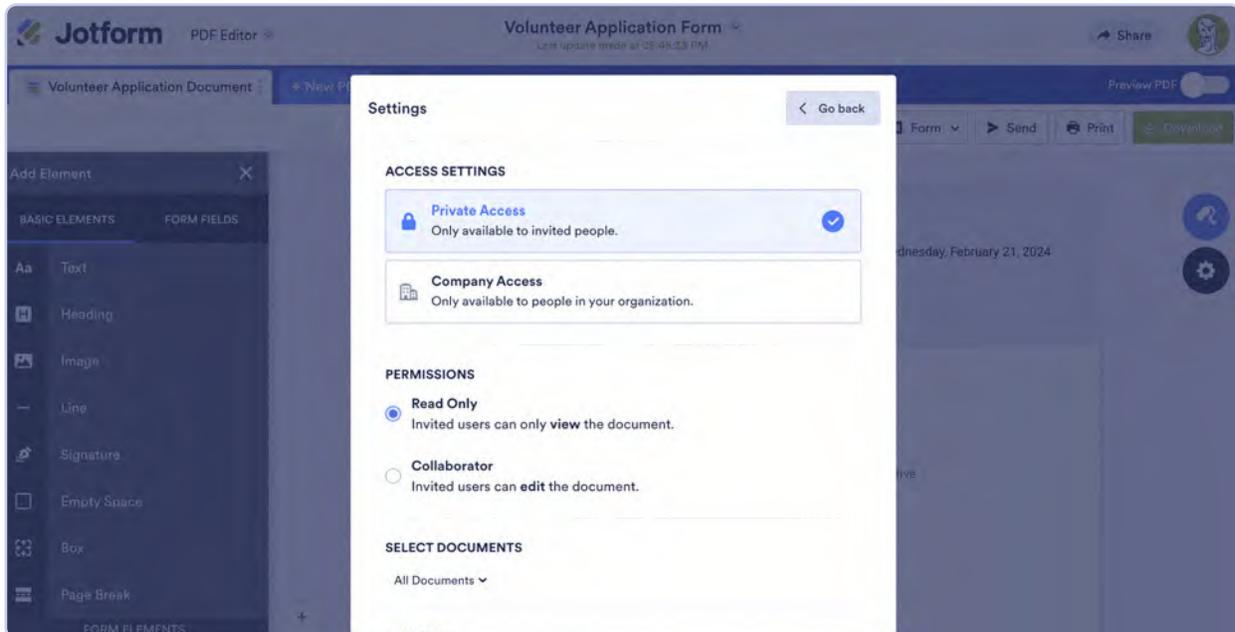
The **Send** button allows you to easily share your form with others. You can share the link we provide you or email it to your form fillers.



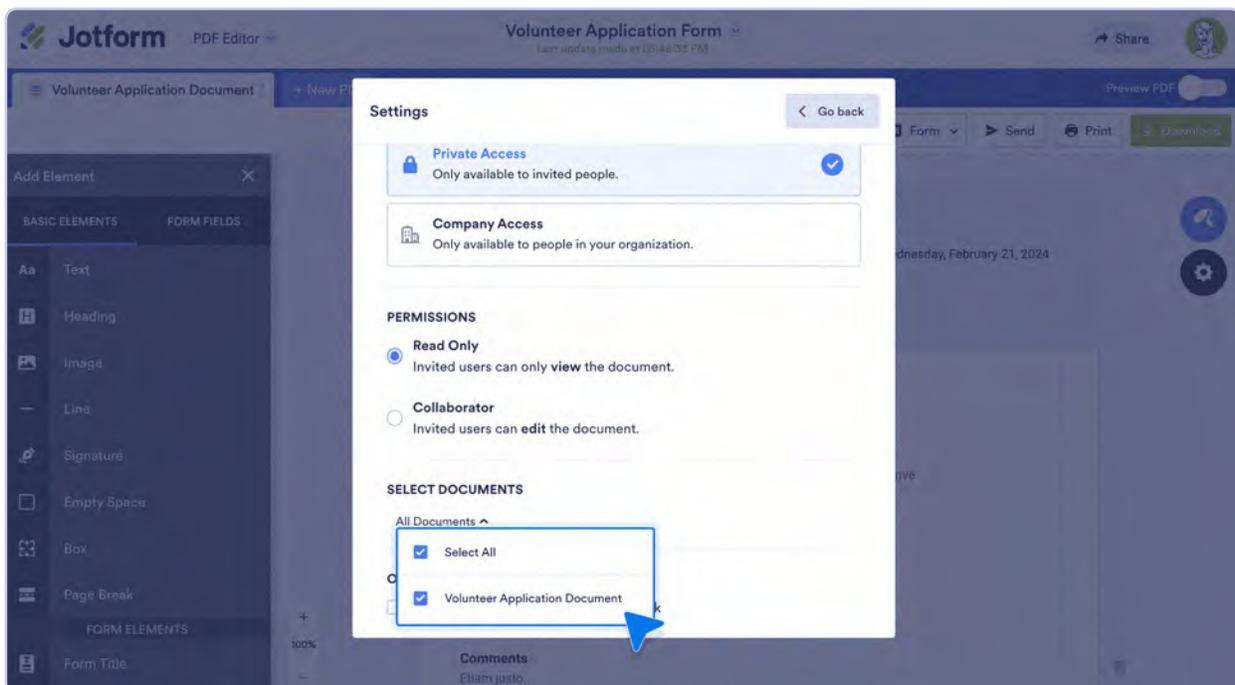
For more granular control over sharing your PDF, click the **Share** button at the top right of the screen.



Here, you can not only share a link directly or via email, you can also adjust the settings to provide company access, allow users to edit the document, and set a date for the link to expire.

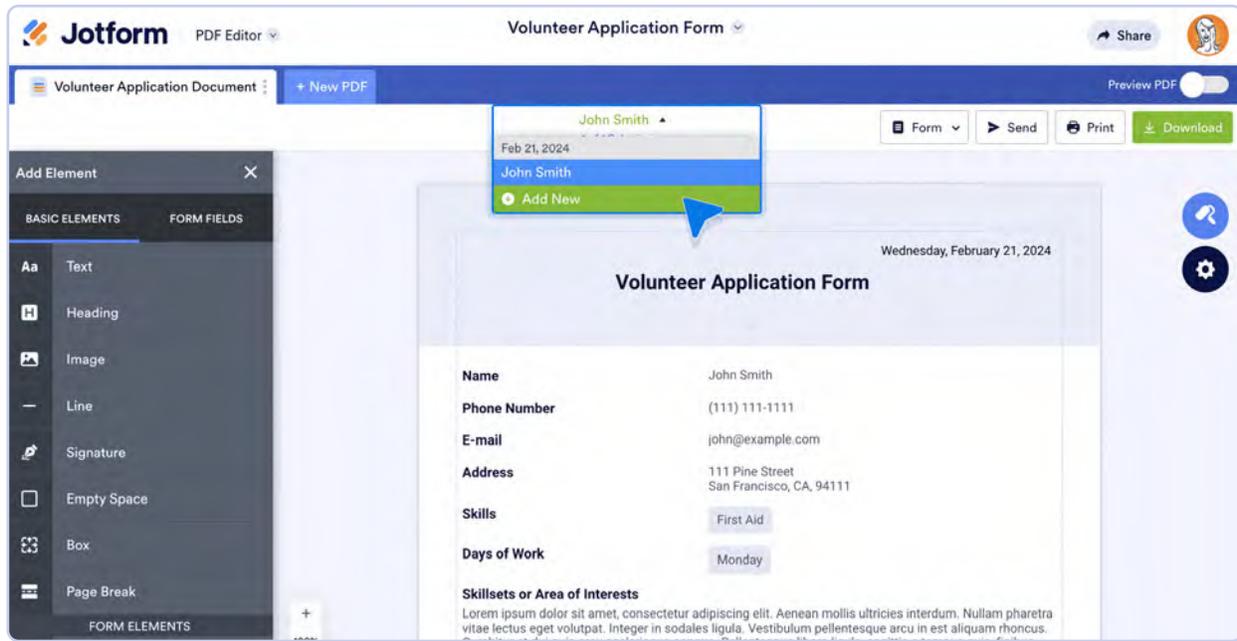


In the **All Documents** dropdown, you can select a specific document or documents to share, or share all documents.



The **Print** and **Download** buttons are fairly self-explanatory. You might need to disable your popup blocker to view the preview of your document.

With Jotform's PDF Editor, you can easily see PDF versions of all your form responses. Click the green dropdown in the middle top of the screen to scroll through your individual responses.

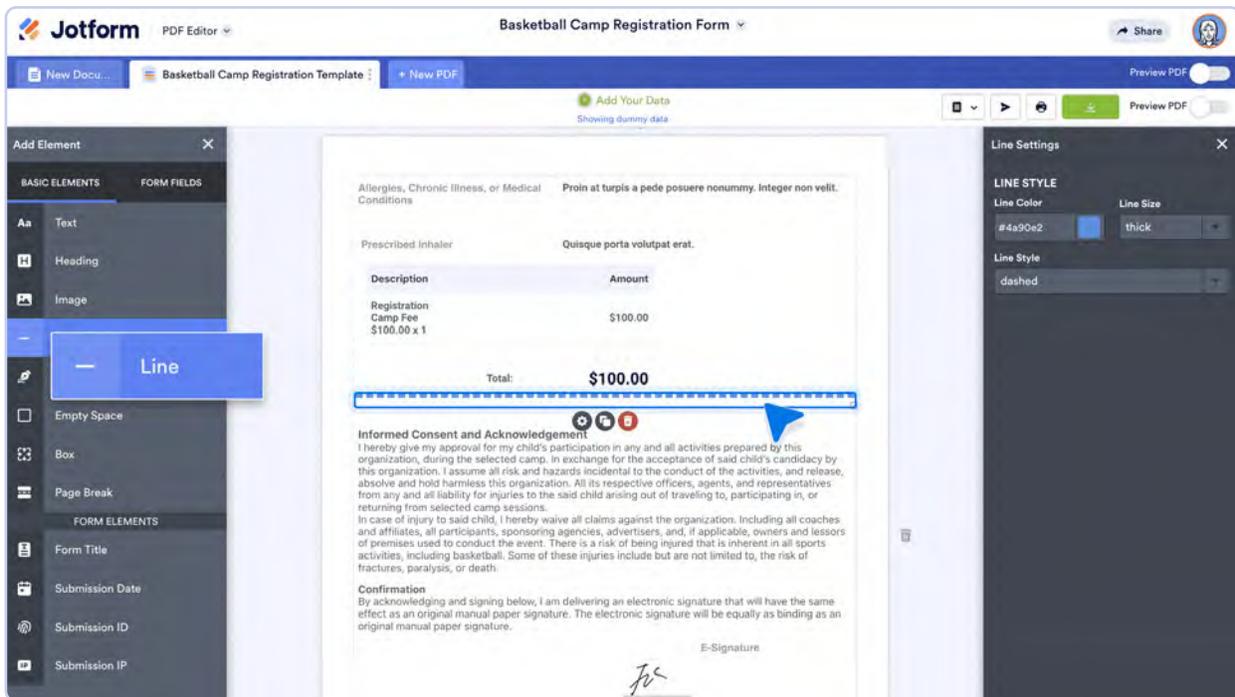


You can include PDFs as email attachments to your notification and autoresponder emails.

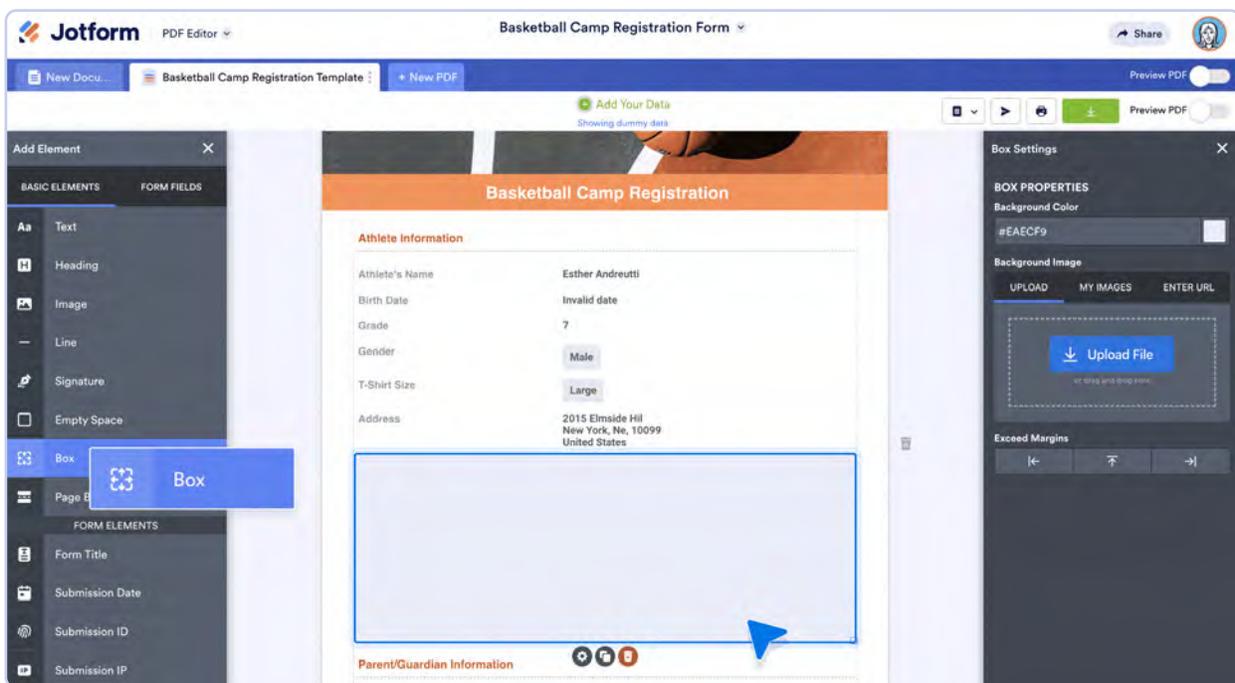
## Elements section

The **Basic Elements** are similar to those in the Form Builder, including **Text**, **Heading**, and **Image**. Some elements, however, are a little different.

Adding a **Line** to your form is a great way to break up long forms and help call out important information for your form fillers. You can use the resizer at the corner of the line to change the length. If you click the gear icon below the line, you'll be able to further customize your line by changing the color, size, and style.



If you want to break up your PDF even more, you can add a **Box**. Similar to adding a line, you can use the resizer to the right of the screen to change the box size. Click the gear icon below the box to add a picture, upload a URL, and change the box's color. The **Empty Space** element is similar to a box, but it's not customizable. It provides an easy way to space out answers in your PDF.



If the form attached to your PDF includes a logo, your PDF will as well, so that your form and PDF have the same branding.

**Basketball Camp Registration**

**Athlete Information**

Athlete's Name: Kelsey Drepp  
 Birth Date: Invalid date  
 Grade: 7  
 Gender: Male  
 T-Shirt Size: Large  
 Address: 53149 Norway Map, Denver, Co, 80204, United States

**Parent/Guardian Information**

**PDF Settings**

PDF File Name: Athlete's Name \_Grade.pdf

Show page numbers

Position: Bottom Right

Use default margin settings

Show margins guide

**ADVANCED**

Enable password protection

Show all field labels on the page

Hide empty form fields

Hiding empty fields will be applied on print and preview mode.

**CREATE A TEMPLATE**

Private Template

Template Title

## Submission Date

Have you ever wanted to add a submission date to a PDF but don't want to open the form connected to the PDF to get the date? All you have to do is add the **Submission Date** element to your PDF. When you add this element, the submission date will automatically populate in your PDF. If you go to the Submission Date element's settings, you can change the date format, language, font, and even the text color.

**Basketball Camp Registration Form**

Does the athlete have any allergies, chronic illness, or medical conditions? If yes, please describe. Duis aliquam convallis nunc.

Is the athlete prescribed an inhaler? If yes, please explain any instructions. In sagittis dui vel nisl. Duis

**CAMP FEE**

| Description                        | Amount          |
|------------------------------------|-----------------|
| Registration Camp Fee \$100.00 x 1 | \$100.00        |
| <b>Total:</b>                      | <b>\$100.00</b> |

**Informed Consent and Acknowledgement**

I hereby give my approval for my child's participation in any and all activities prepared by this organization, during the selected camp. In exchange for the acceptance of said child's candidacy by this organization, I assume all risk and hazards incidental to the conduct of the activities, and release, absolve and hold harmless this organization. All its respective officers, agents, and representatives from any and all liability for injuries to the said child arising out of traveling to, participating in, or returning from selected camp sessions.

In case of injury to said child, I hereby waive all claims against the organization. Including all coaches and affiliates, all participants, sponsoring agencies, advertisers, and, if applicable, owners and lessors of premises used to conduct the event. There is a risk of being injured that is inherent in all sports activities, including basketball. Some of these injuries include but are not limited to, the risk of fractures, paralysis, or death.

**Confirmation**

By acknowledging and signing below, I am delivering an electronic signature that will have the same effect as an original manual paper signature. The electronic signature will be equally as binding as an original manual paper signature.

Friday, December 21, 2018

**Submission Date Settings**

**DATE FORMAT**

Language: English (United States)

Format: dddd, MMMM D, YYYY

Use 12-hour clock

**ANSWER STYLE**

Font Family: Roboto

Font Size: 11pt

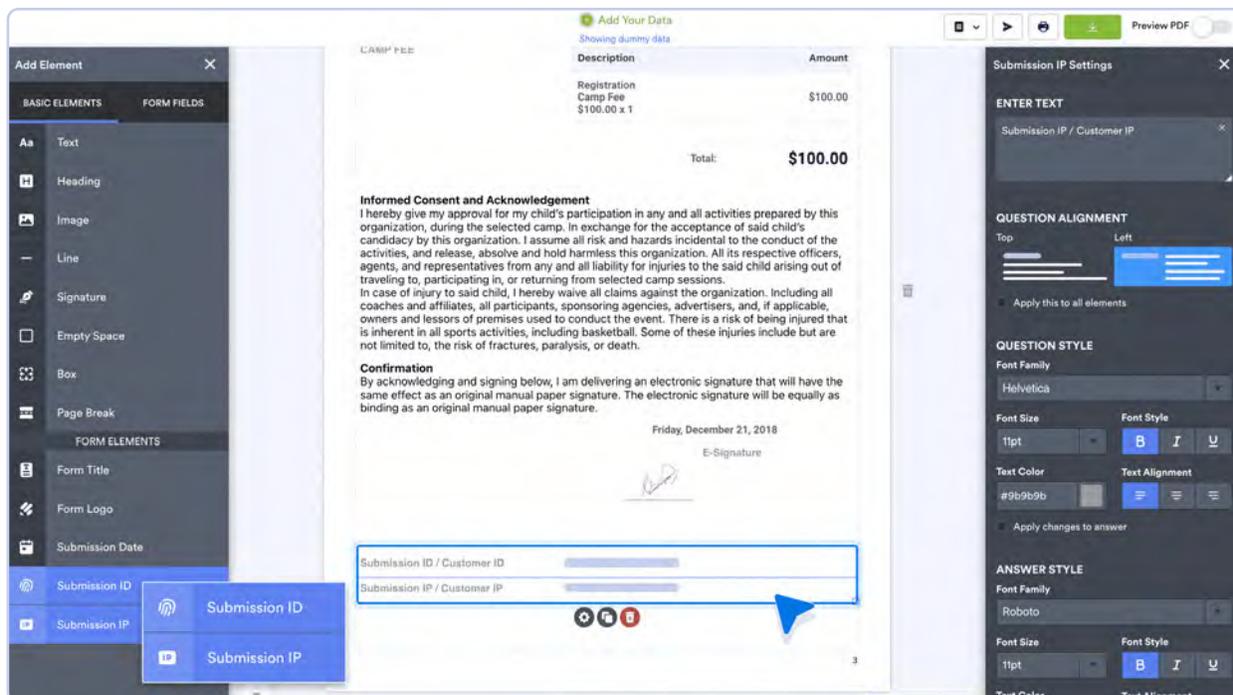
Font Style:  B  I  U

Text Color: #5f5f5f

Text Alignment:  Left  Center  Right

## Submission ID and Submission IP

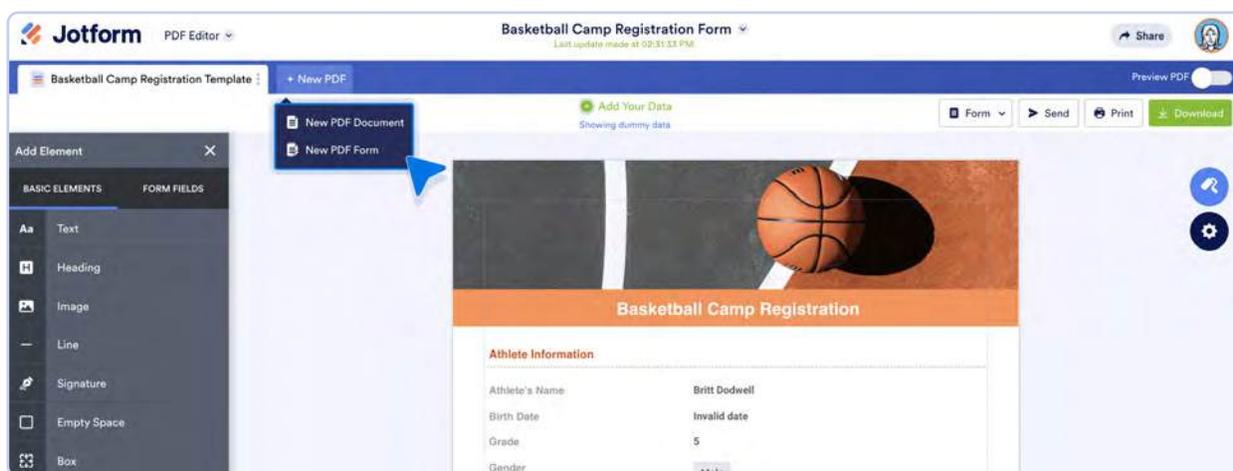
Like the Submission Date element, **Submission ID** and **Submission IP** will automatically populate the ID/IP in your PDF. If you open the settings menu for either, you can customize the font and rename your Submission ID and Submission IP.



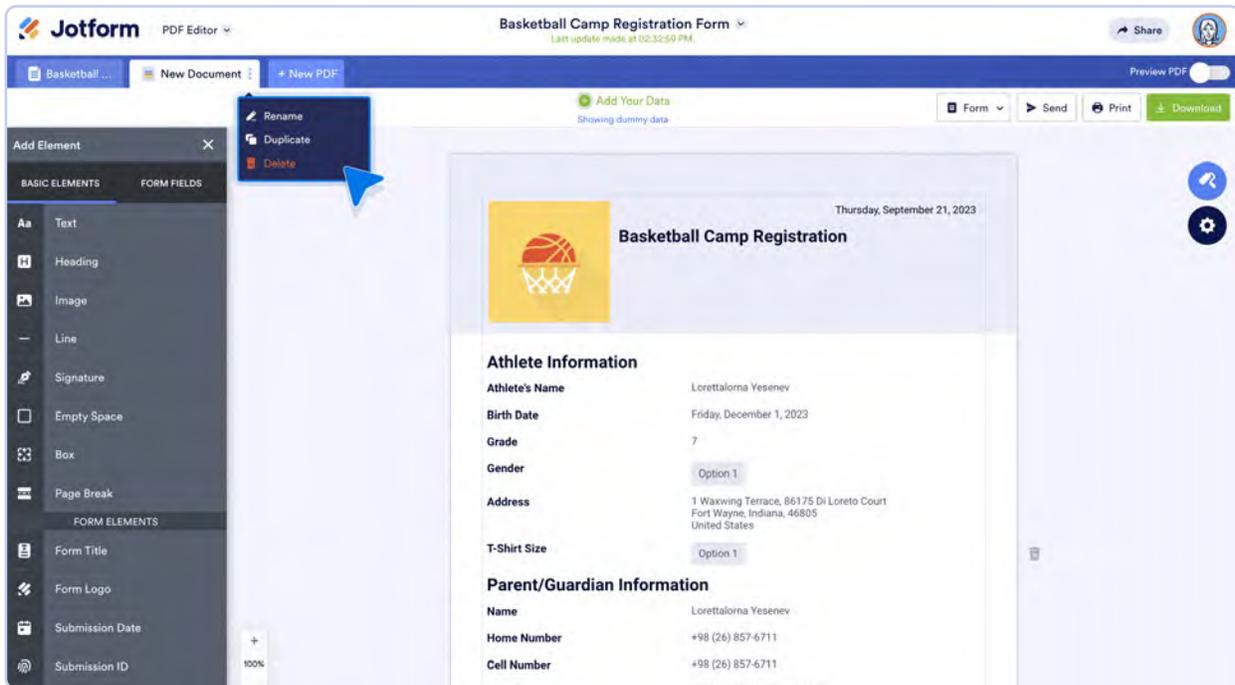
Both of these elements make it easier to keep track of submissions when other people don't have access to your inbox.

## Tabs

You can use the tabs in PDF Editor to create a new PDF document or a new PDF form. Just click the **New PDF** tab and select an option from the dropdown.

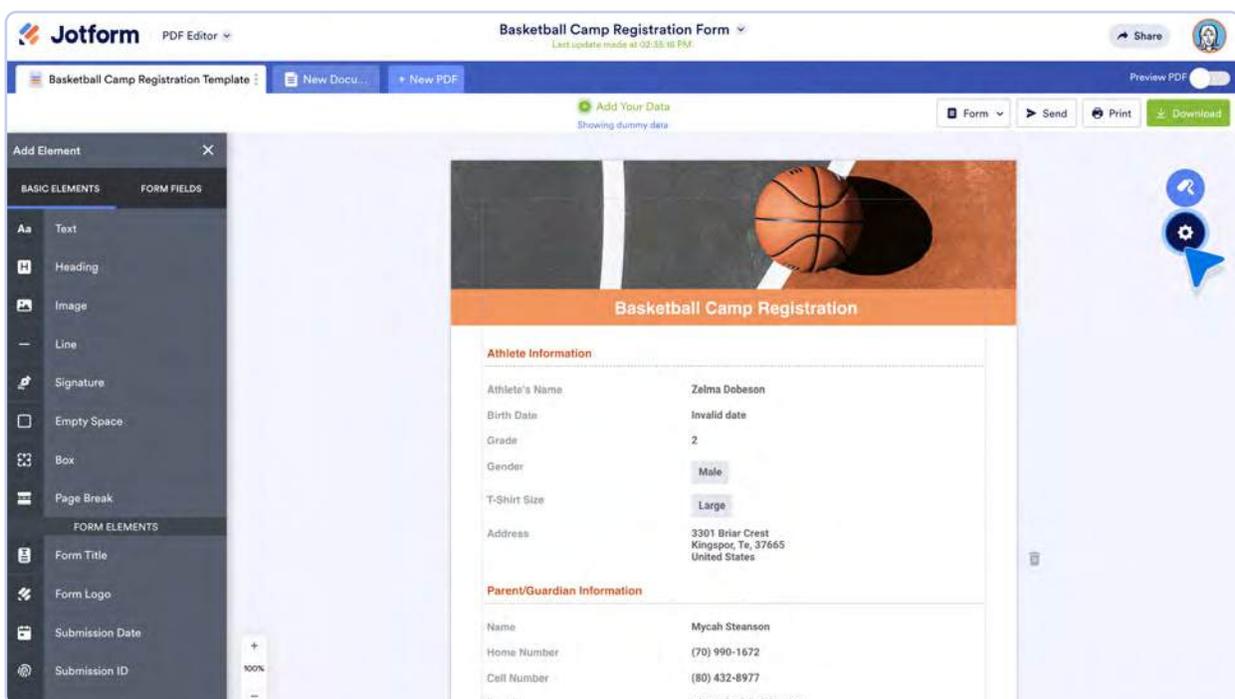


If you click on the menu next to the tab name, you can rename the tab, duplicate it, or delete it.

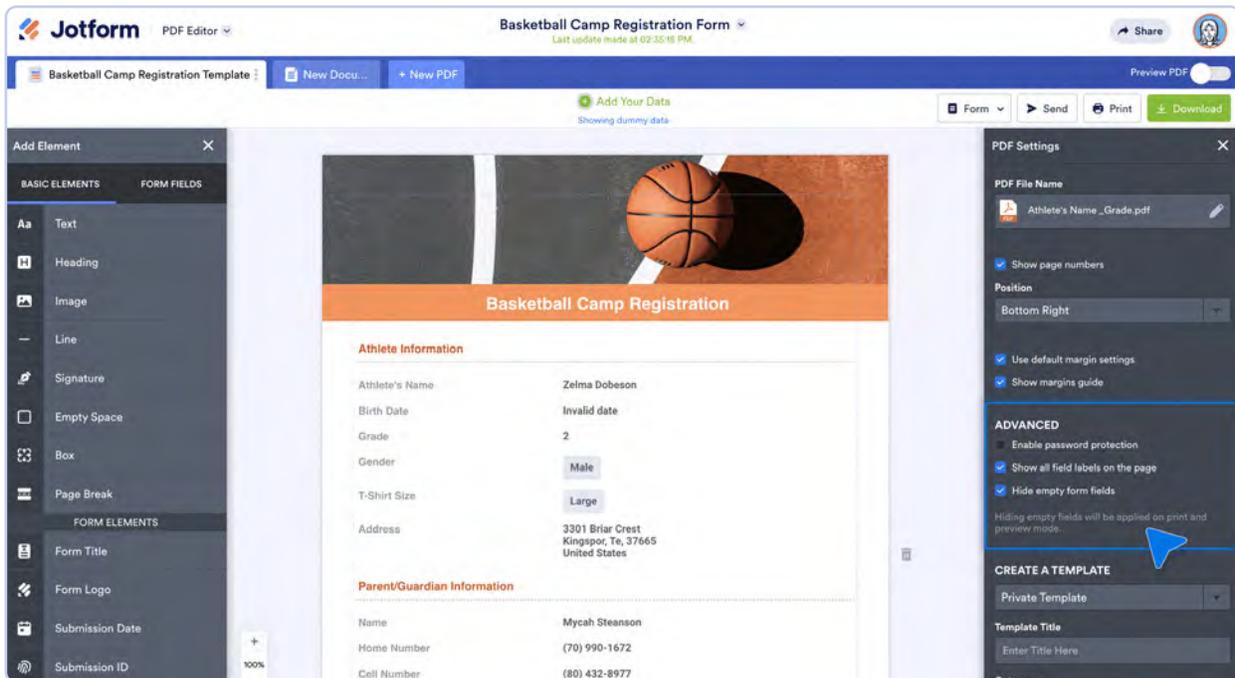


## PDF Settings

If you're looking to change the settings of the PDF as a whole and not just specific elements, click the gear icon on the right side of the PDF Editor to open PDF Settings.

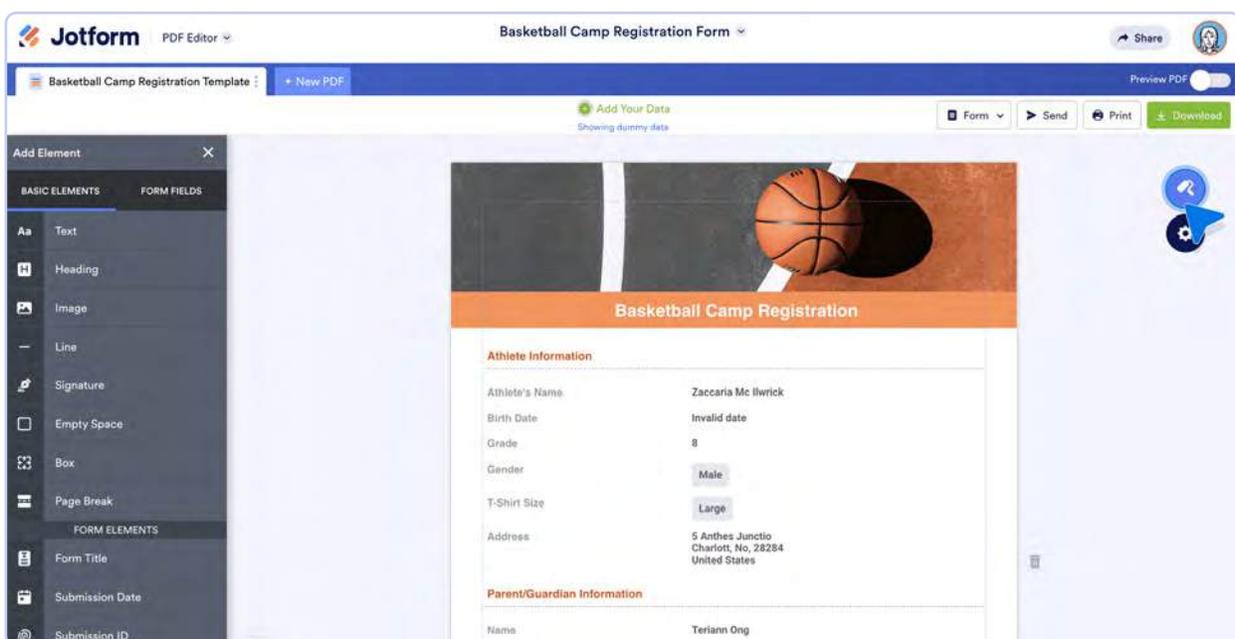


These settings allow you further control over the look and feel of your PDF. In the advanced settings, you can enable password protection and hide empty form fields.



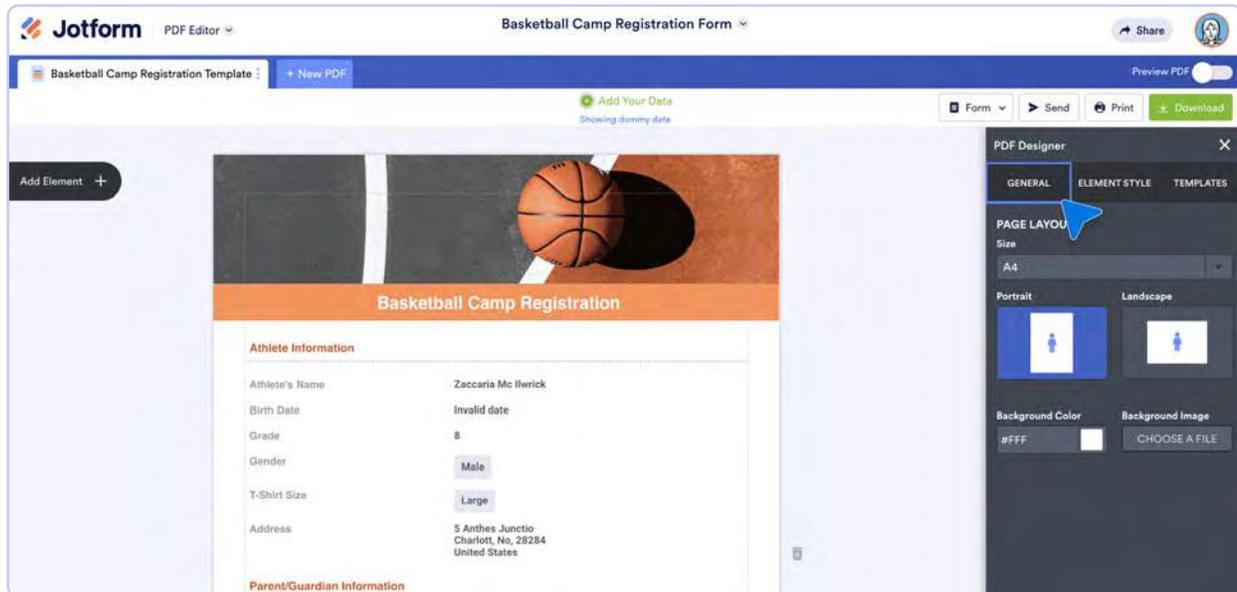
## PDF Designer

If you want to further customize the look and feel of your PDF, click the paint roller icon on the right side of the PDF Editor. This opens the **PDF Designer**, where you can change your PDF's layout, size, color, and margin alignment, and add a template to easily change up the look of your PDF.



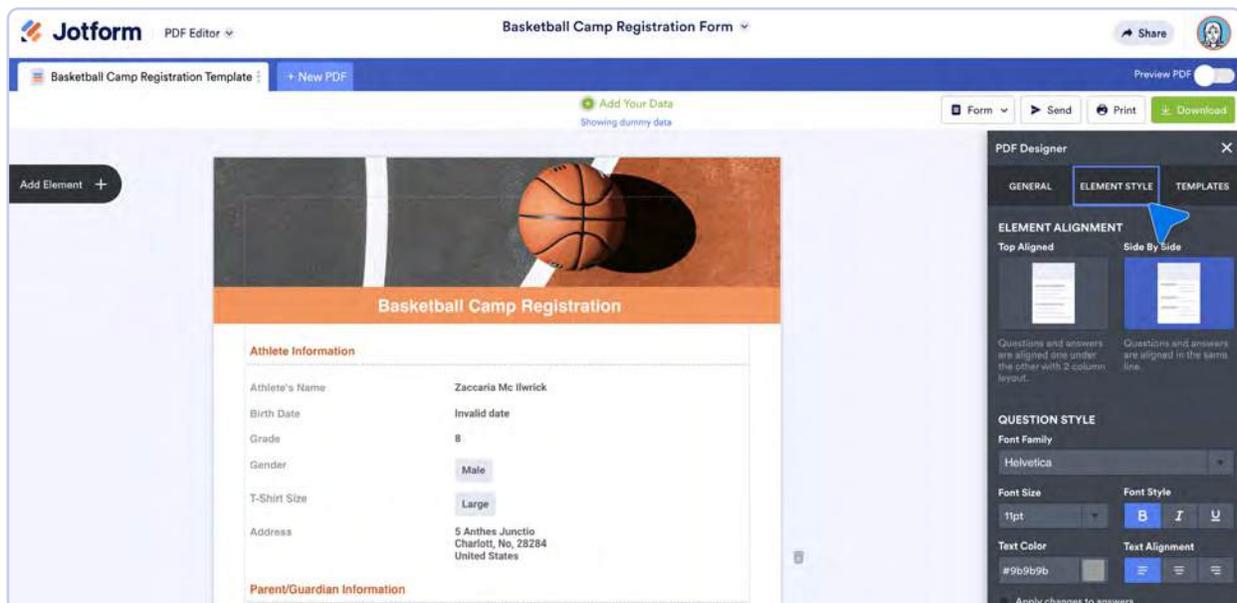
## General

The **General** tab is where you'll customize the simplest elements of your PDF. You can change your PDF's size, orientation, and background color. You can even add a background image if you'd like.



## Element Style

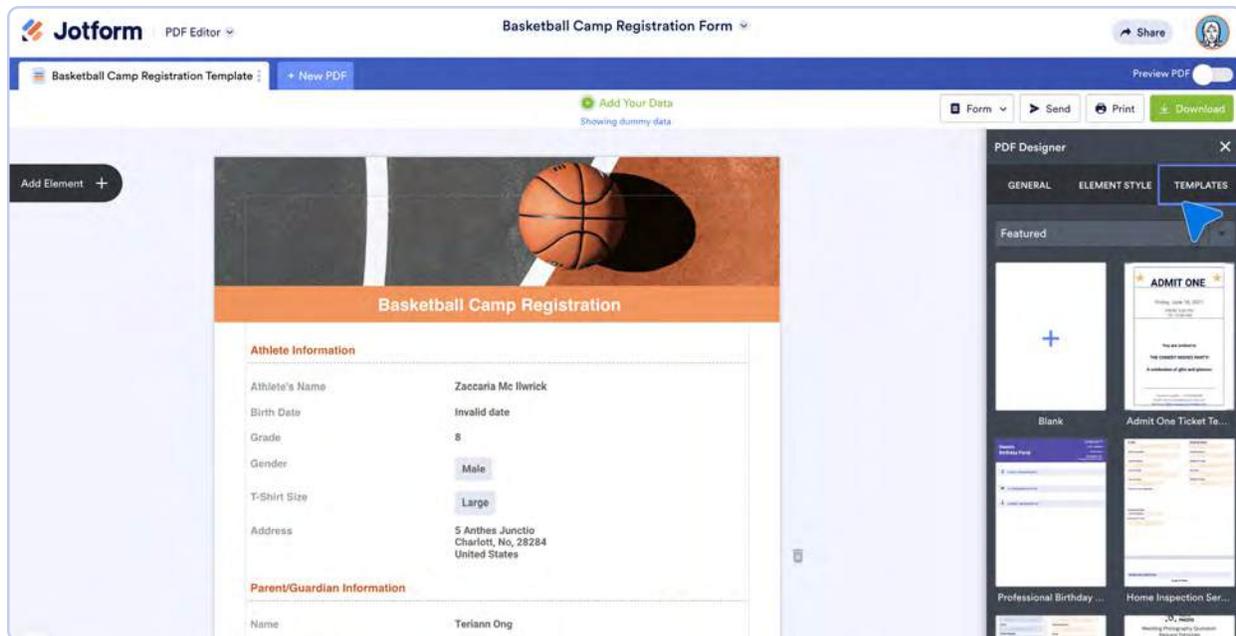
In the **Element Style** tab, you can change the alignment of the questions and answers in your PDF, and the font and color of question text. You can either top align your questions or arrange them side by side. Choosing **Top Aligned** will arrange your questions so that each answer appears directly underneath each question. **Side By Side** will arrange your questions and answers so that they appear on the same line, with questions on the left and answers on the right.



If you want your questions and answers to be the same font, select the **Apply changes to answers** option.

## Templates

In the **Templates** tab, you can choose from premade templates to easily give your form responses a uniform look. If you're looking for a template that fits a specific industry, just use the dropdown menu to filter templates by industry.



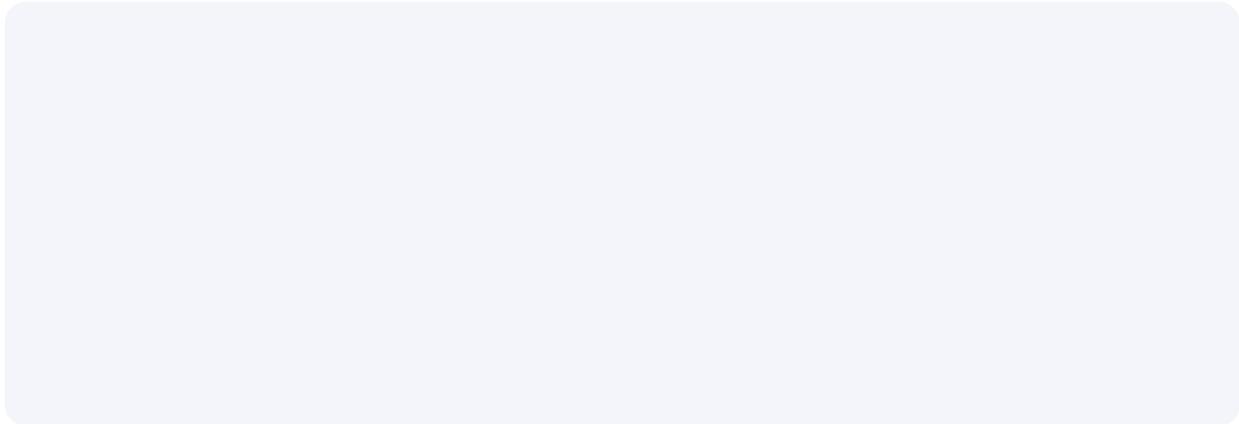
## Smart PDF Forms

Now that we've discussed how to create PDFs from form submissions, let's talk about how easy it is to create an online form from a PDF. Though PDFs revolutionized the way we handle paperwork, they also brought a host of new questions and concerns, like how to fill them out and send them back.

More often than not, you would either have to pay for expensive software to fill in the PDF and email it back, or you'd have to print out the document, fill it out, and mail it back. Even worse, you could print it, fill it out, scan it, and email it back. Yes, now we're able to conveniently access the forms we need, but filling them out and sending them in became the newest pain.

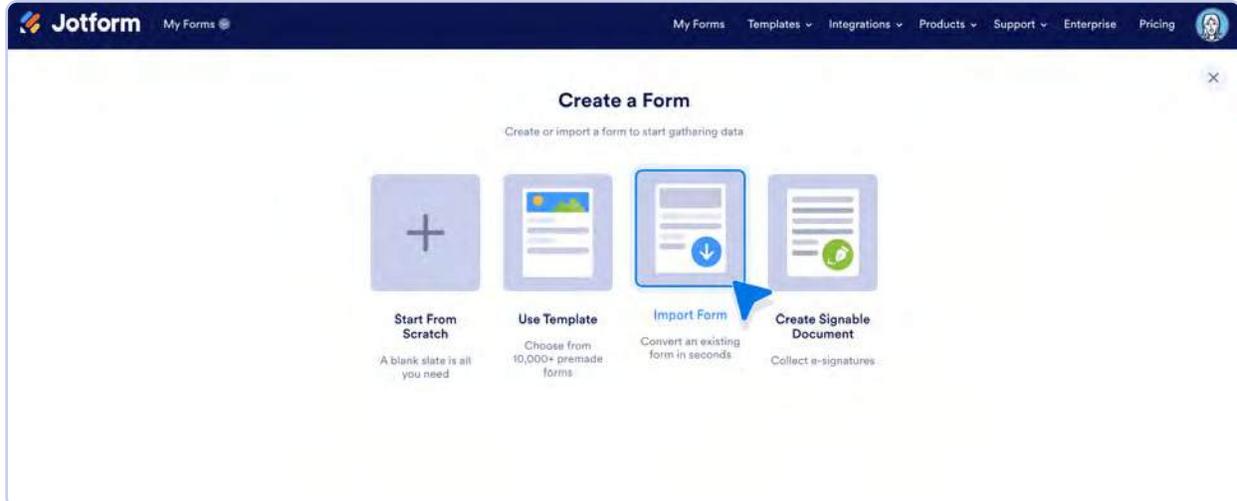
Solving this problem became part of Jotform's journey to create an end to end workflow productivity tool. With Jotform, you can upload your PDFs and turn them into fillable forms.

Ayyoub Ajmi at CivilLaw.Tech uses Jotform Enterprise's Smart PDF Forms to ensure his clients are protected from abuse. Smart PDF Forms make the process more foolproof because Ajmi is no longer sending handwritten petitions, which are easier for the judge to decipher.

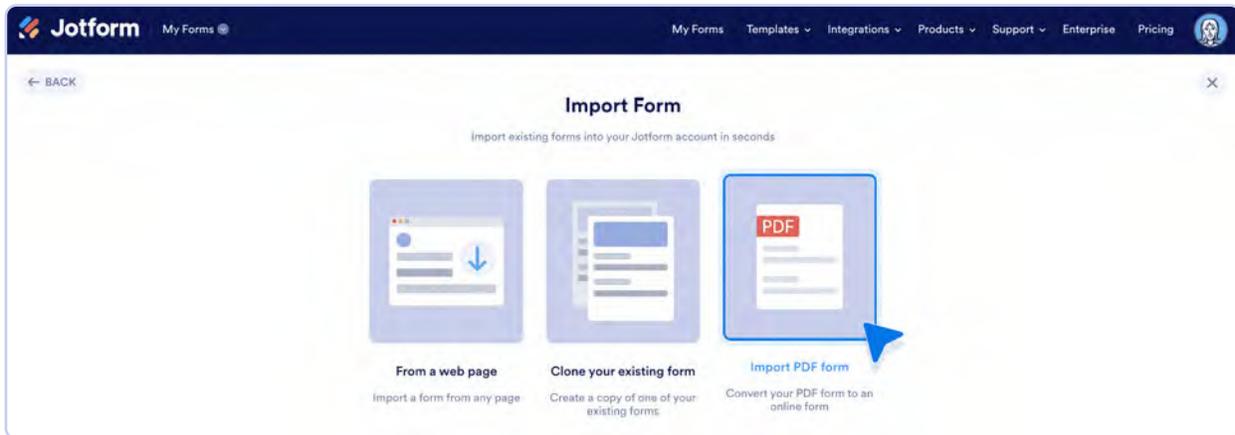


## Upload a PDF

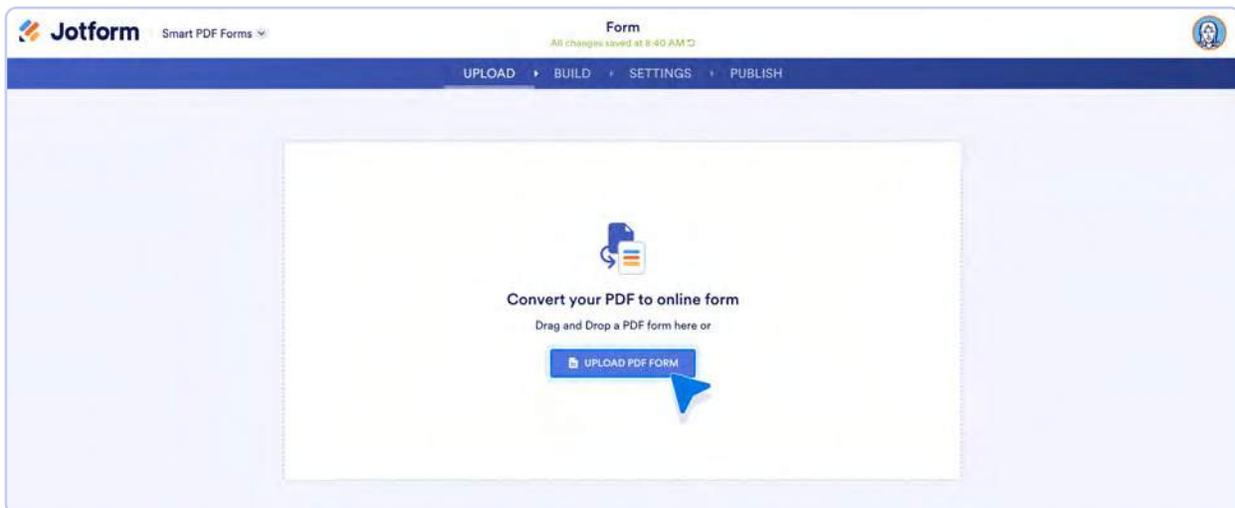
You can turn your PDF into an online form right from the Form Builder. Click **Create Form** and then the **Import Form** button.



Select **Import PDF form**. From there, you can upload a PDF from your computer.



Select the PDF you'd like to upload, and click the **Upload PDF Form** button.



If your PDF has a lot of pages and fields, it might take a while to upload. But you'll get a loading screen so you know what's going on.

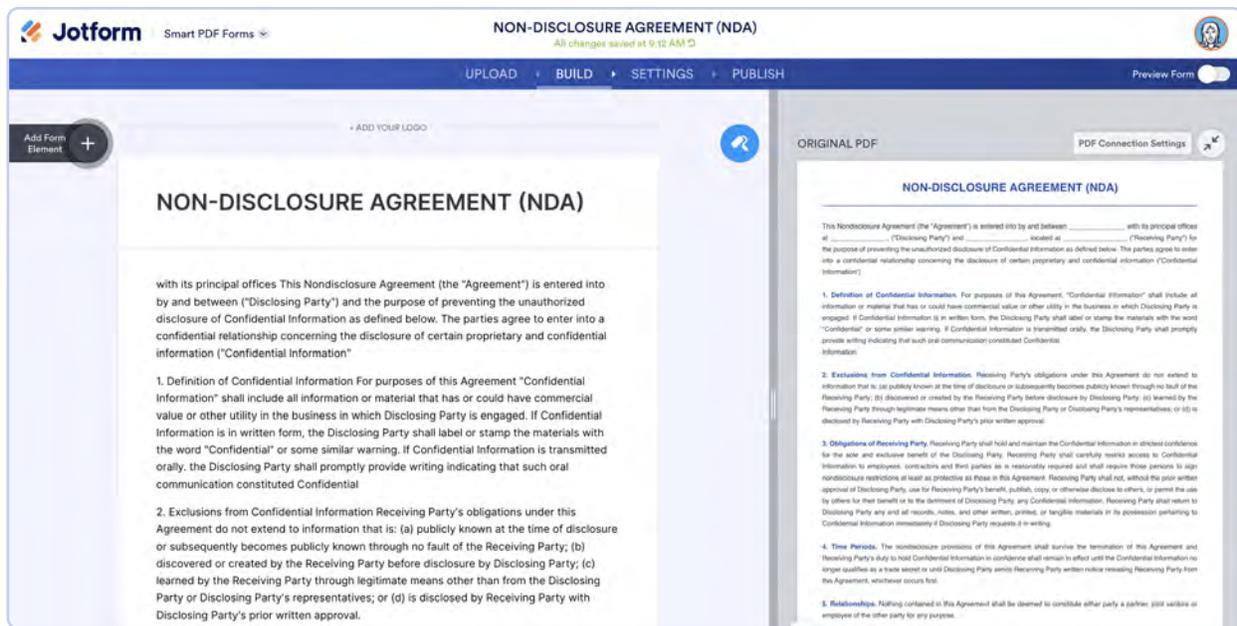




### Pro tip

Jotform Smart PDF Forms accepts documents up to 15 MB. If your document is more than 15 MB, you'll get an error message.

Once your PDF is fully uploaded, you'll see a side-by-side comparison of Jotform's version and the version you uploaded, so you can fix any mistakes and add page breaks where necessary.

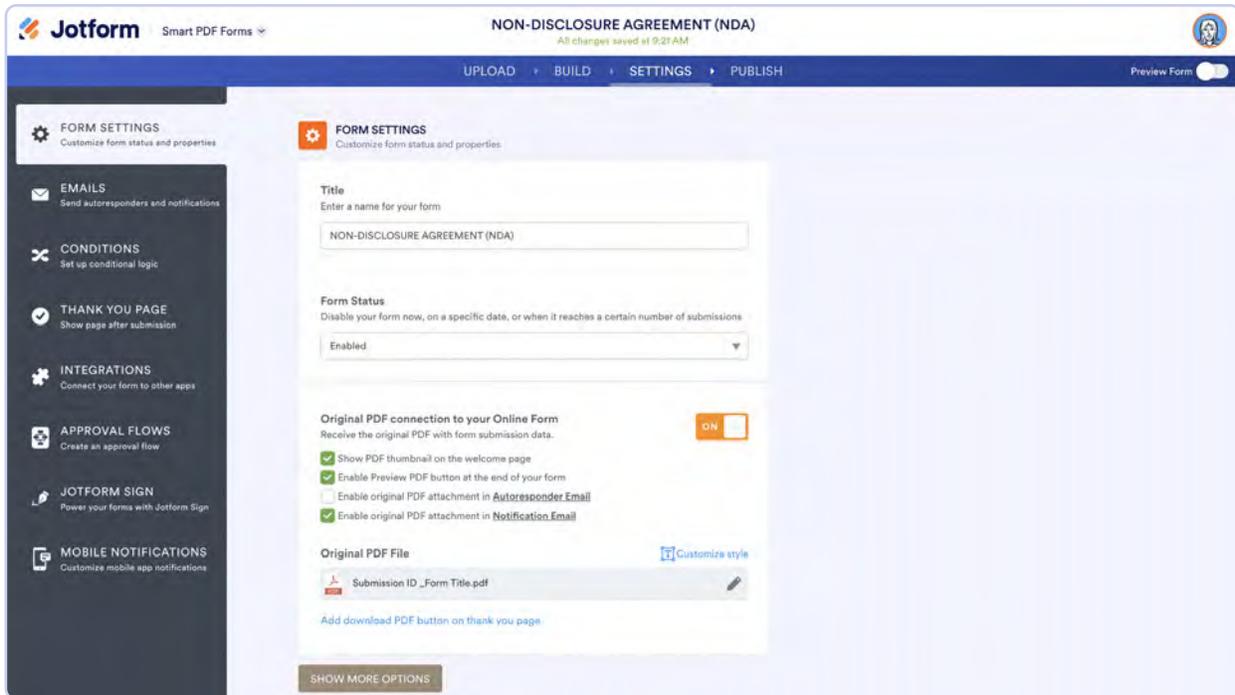


If you want to change any wording, double-click the element, and you'll be able to edit it. Sometimes our PDF reader will misinterpret a word or two, so just double-click the text element to change it. (Jotform's text element has features similar to any word processing program.)

Click on the paint roller icon to open the Form Designer, where you can change colors, images, forms, styles, and more.

## Smart PDF Forms Settings

Once you're done uploading your form, go to the **Settings** tab to customize your form's status and properties. In the **Form Settings** options, you can change the title of your form, connect or disconnect your original PDF to/from your online form, edit the format of your PDF, change your form's status, and more.



The **Original PDF connection to your online form** section has a few options, so let's go over those:

- **Show PDF thumbnail on the welcome page.** The PDF thumbnail will show a preview of your PDF and a welcome page before your submitter fills out the form. If you turn on this option, you can help your submitters get an idea of what they're filling out before they get started.
- **Enable Preview PDF button at the end of your form.** Enabling a PDF preview will give your submitters the opportunity to view their submission before they click send and hopefully cut down on errors.
- **Enable original PDF attachment in autoresponder email.** You'll be able to automatically send the PDF as an attachment to your autoresponder emails.
- **Enable original PDF attachment in notification email.** Similar to the aforementioned option, you can automatically send your PDF as an attachment to notification emails.

You may have noticed "original" in the last two options above. That's because once a form filler submits their responses, the resulting PDF will include their answers in the original PDF format.

## Jotform Sign

During user interviews, we discovered that many people were using Jotform extensions, widgets, and plug-ins to create contracts. So we asked ourselves a few questions:

- How can we meet our users where they're at?
- How can we natively integrate something our users are already using?
- How can we make this process simpler?

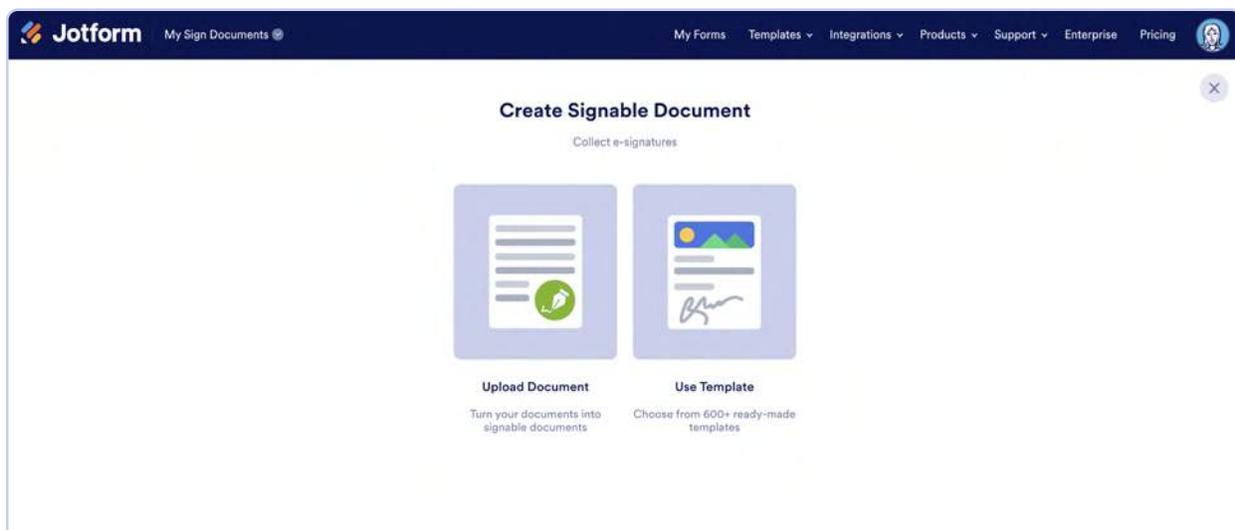
And that's how Jotform Sign was born. Now all our users can drag and drop a signature field into their form to turn it into a contract.

David Kinzler at One to One Health has used Jotform Enterprise to make collecting information and signatures quick and easy. "Healthcare paperwork can be annoying. With Jotform Enterprise, we've made it as simple as possible for people to sign paperwork at the doctor's office and for us to track it," he says.

Jotform Sign allows you to create documents in one place. The Sign Builder works a lot like the Form Builder. Just drag and drop the **Signature** element into a document. We also included escalations and other ways to automate the signing flow.

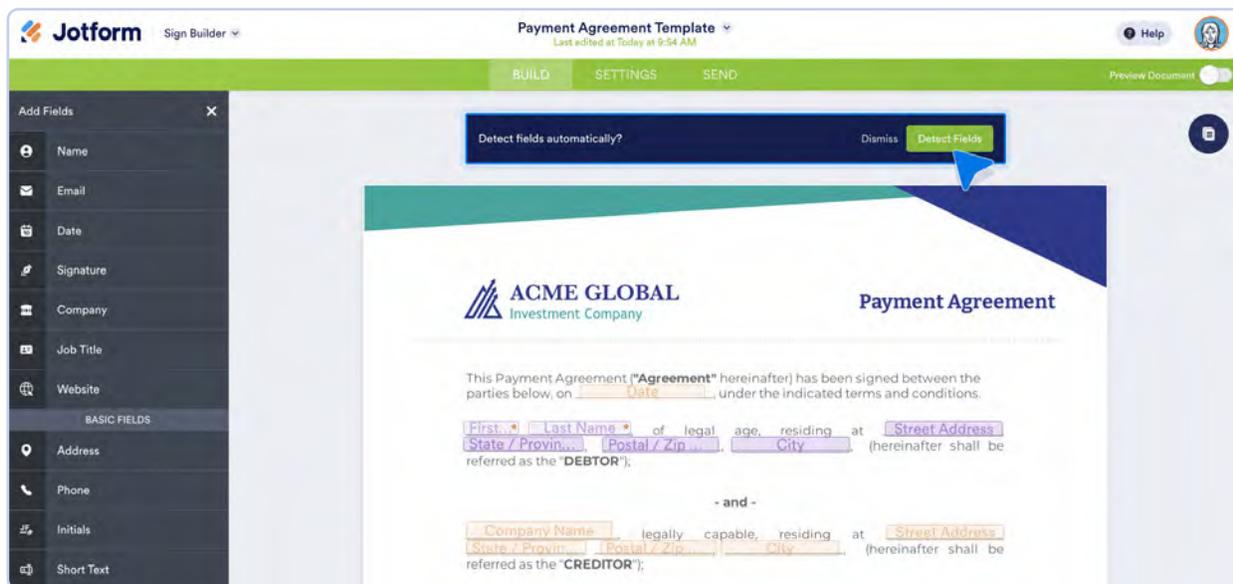
## Build

As in the Form Builder, the **Build** tab is where you build documents. You can upload an existing document or use a template.



## Auto-detect fields

When you first upload a document for signing, a window will pop up asking if you want to auto-detect fields. If you click **Detect Fields**, our machine learning will scan your document for possible fields and automatically add them. Of course, you have the flexibility to delete or change them if they're not quite right. Since we're using machine learning, the auto-detect feature will become more accurate and faster with each use.



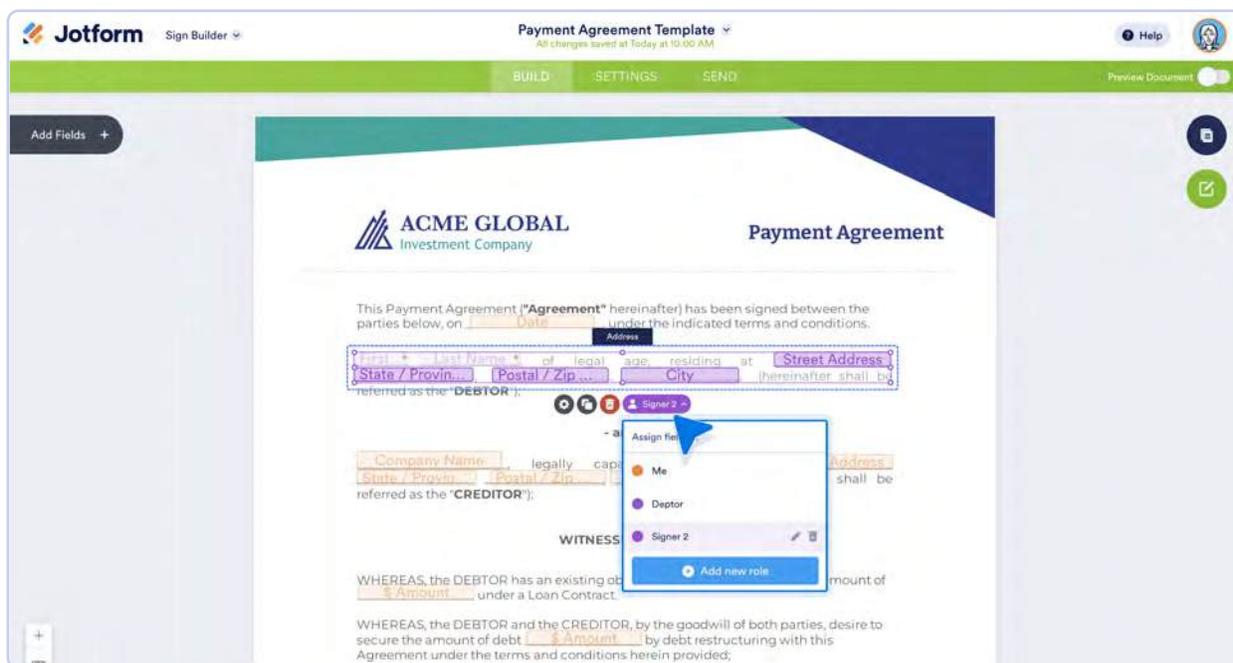
After Jotform scans your document, you'll be asked if you'd like to keep the detected fields. Click **Keep All** to keep all the signature fields, and click **Undo** to get rid of them and add your own fields.

If your document includes more than one page, you can click the documents icon on the top right side of the Sign Builder to view the different pages in your document. Click the **Edit Template** icon to edit the template.



## Build tab settings

The Build tab offers a bevy of preset fields, all of which are fillable. They mimic the capabilities of the elements in the Form Builder. The main difference is that each field in the Sign Builder will be assigned to someone to fill out, usually the signer or the document owner. You can also assign a field to someone else by adding a new role. Just click the **Add new role** button at the bottom of the **Assign field** to dropdown.

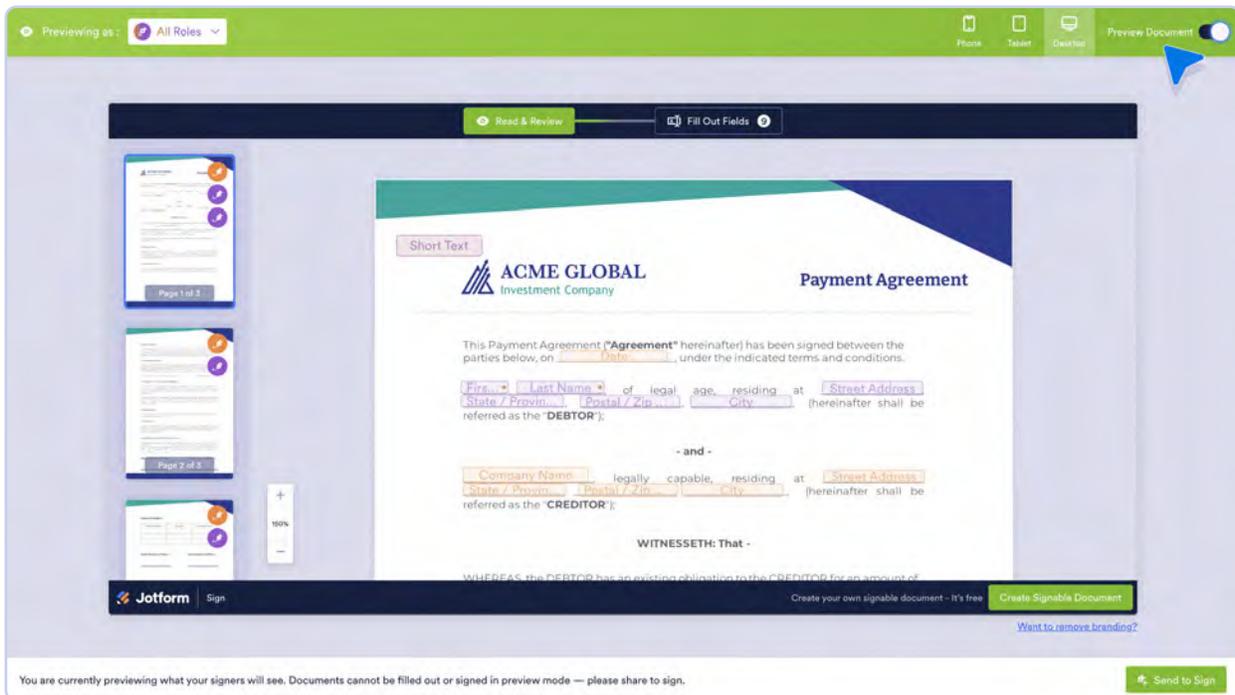


The field settings vary slightly depending on the field. But for all, you can change the labels and sublabels, make any field required, require answers in a specific format, and more.



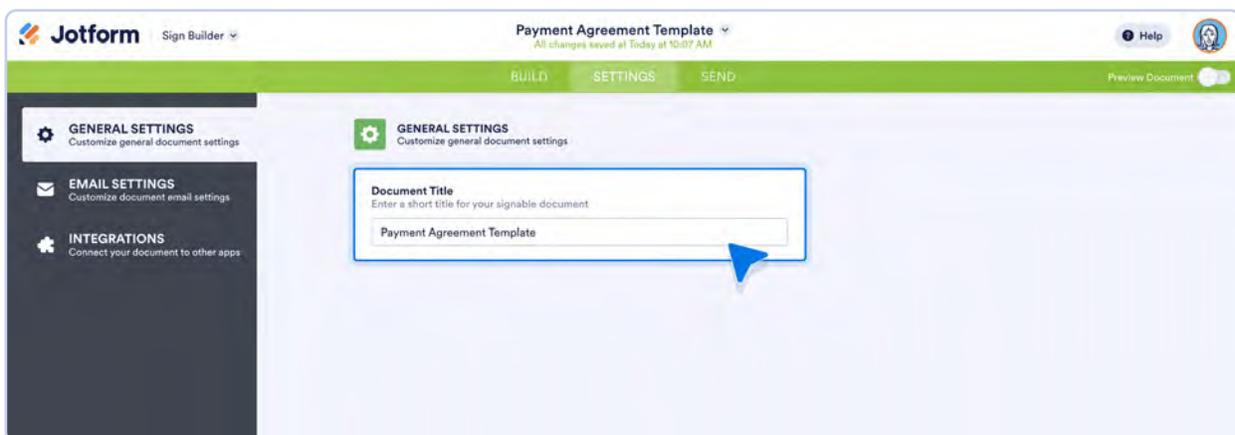
## Preview Document

If you want to see what your signers see, just preview the document. The **Preview Document** toggle is on the right side of the Sign Builder. Toggle the switch on, and you'll be able to see what your signer sees. Different fields are color coded. When you're in preview mode, the only changes you can make to the document are switching signers' roles. Documents can't be completed and signed in preview mode.

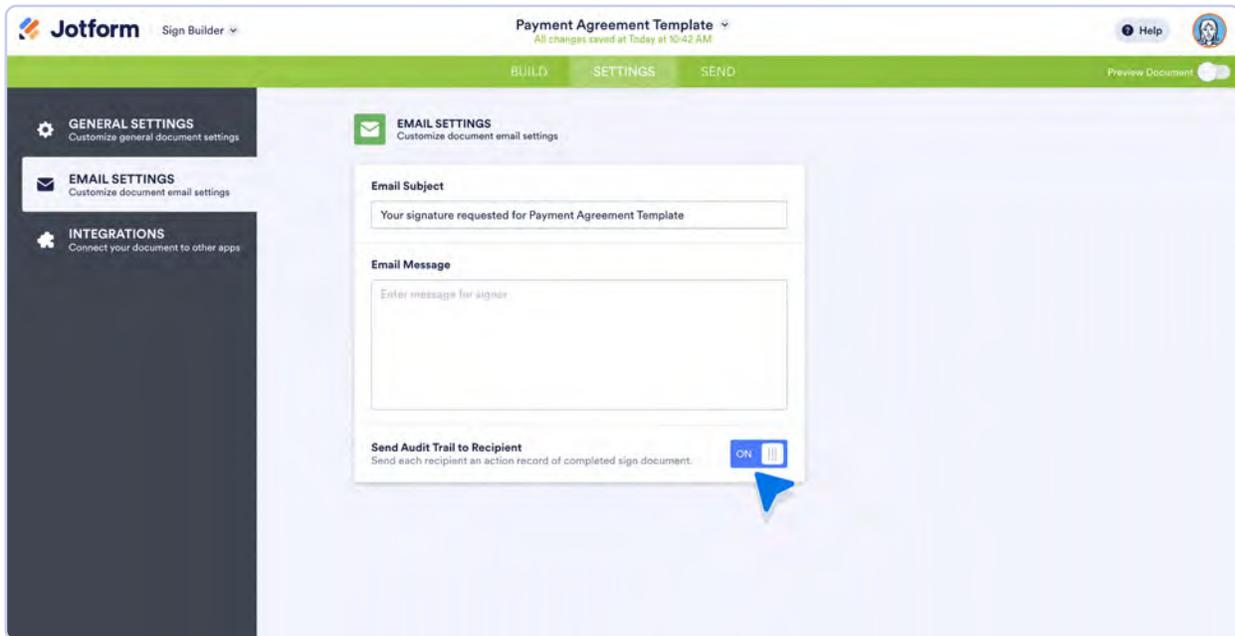


## Settings

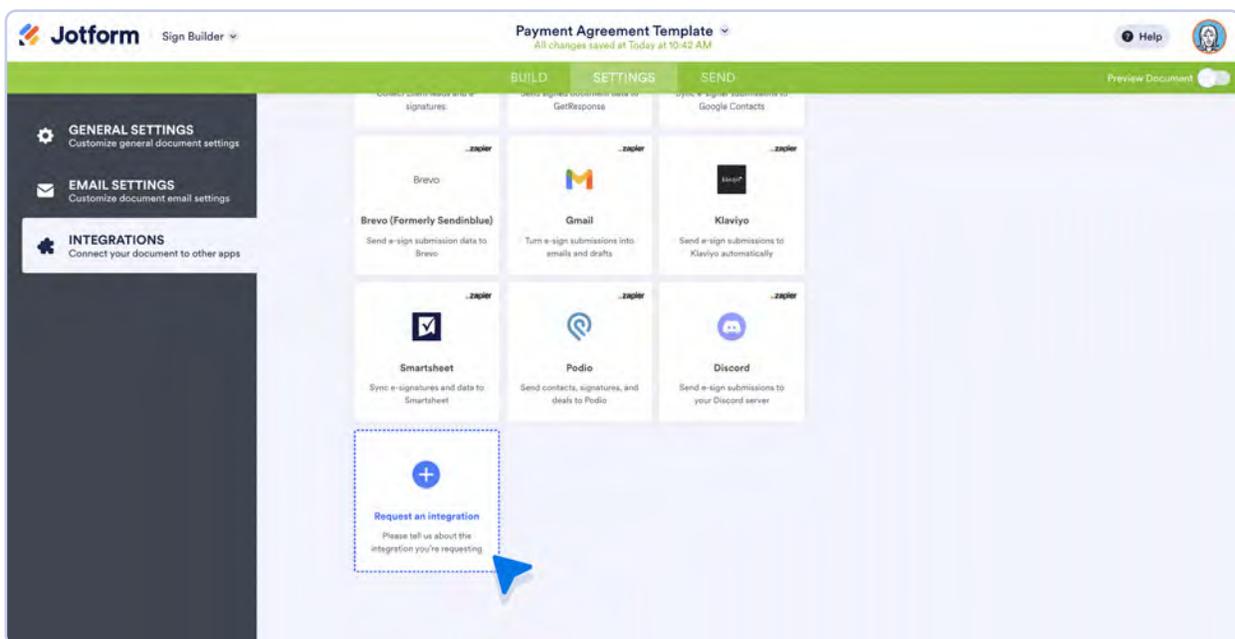
When you've added all the applicable fields to your document, move to the **Settings** tab to further personalize your document. This tab is very straightforward. You can change the name of your document to something more relevant to your signers.



Move onto **Email Settings** to personalize the email to your signers. You can change the subject line and customize the message. You can also send an audit trail to your recipients, to make sure all involved parties have the appropriate documentation.



Use one of Jotform's 30-plus direct integrations to send your signed documents and data to other apps. If you use another workflow product not included in our list of direct integrations, you can use Zapier to create a direct integration. Feel free to request an integration if we don't have a direct integration with a product you love.



## Send

As with the Form Builder, you can share a Sign document via link or embed a document into your site for people to fill out. Below are some features in the **Send** tab that are unique to Jotform Sign.

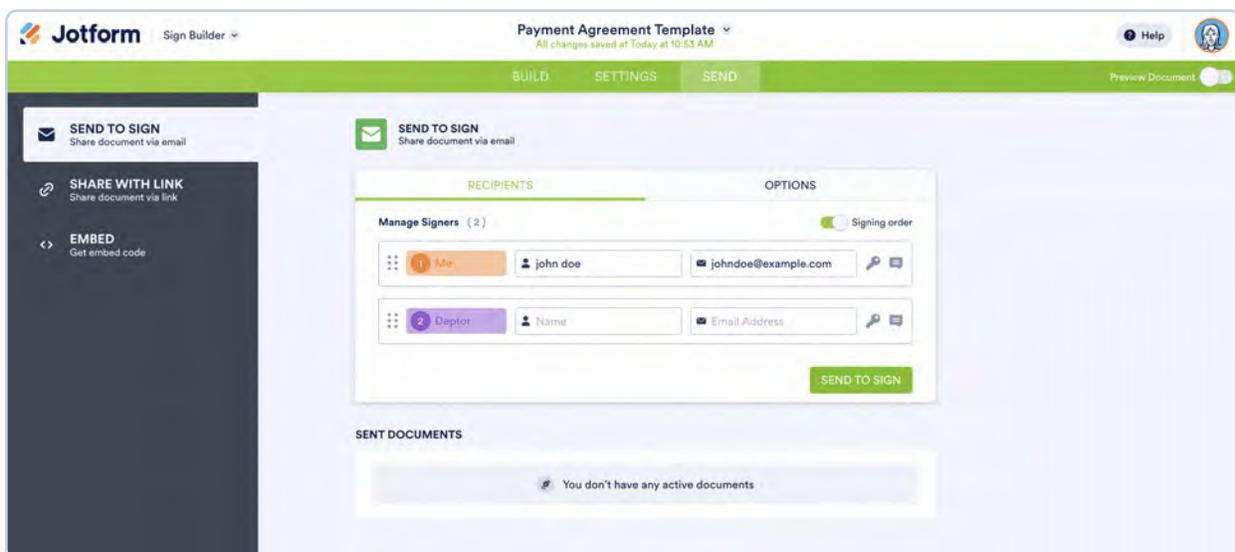
### Did you know?



The global digital signature market was \$4.4 billion in 2021. It's expected to increase to \$42 billion by 2030 (Global Newswire, 2022).

## Signing order

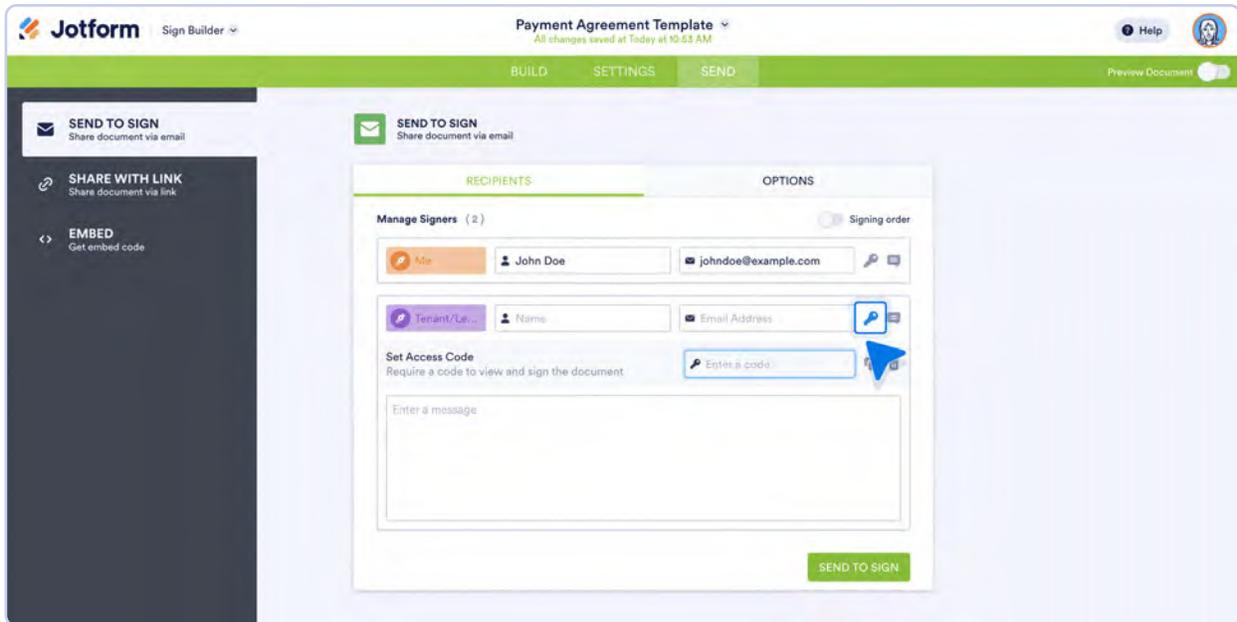
To change the order in which signers must complete the contract, toggle on the **Signing order** and then drag and drop the signers into the correct order.



## Access code

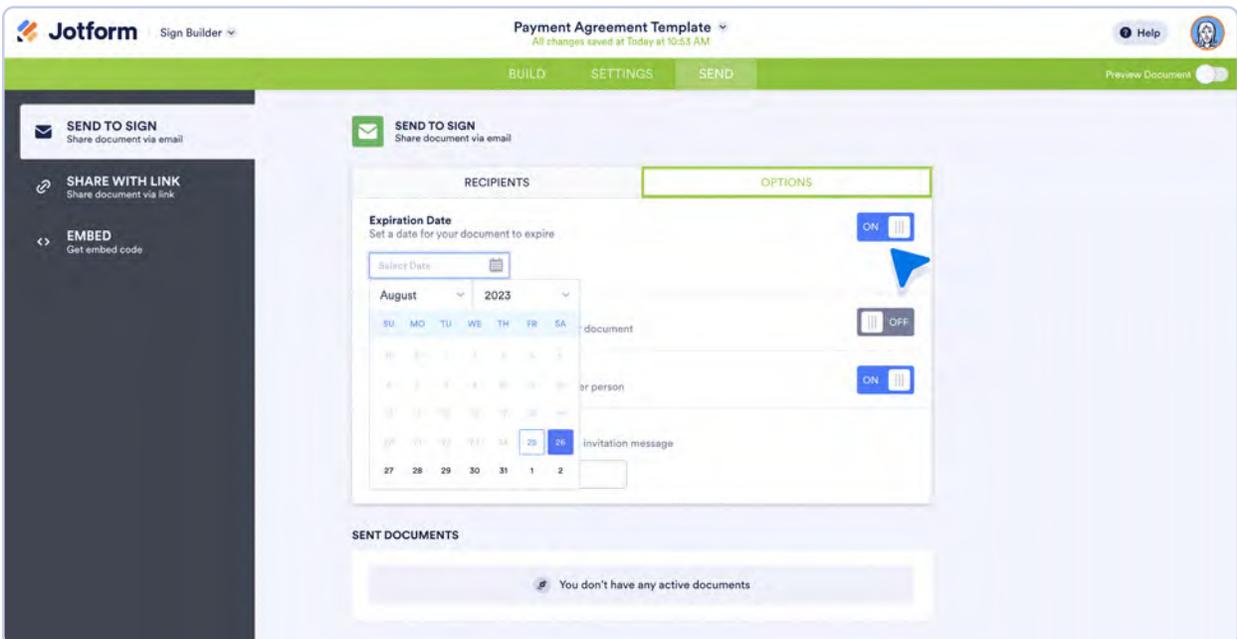
Adding an access code will help you keep confidential documents safe. If you add an access code, only people who have the code will be able to view and sign the document. To set up an access code, go to the Send tab and click the key icon to the right of your recipients. Enter an access code, which can be any combination of numbers.

In the **Recipients** tab, you can send a message to your signer with important instructions or anything else you'd like to add.

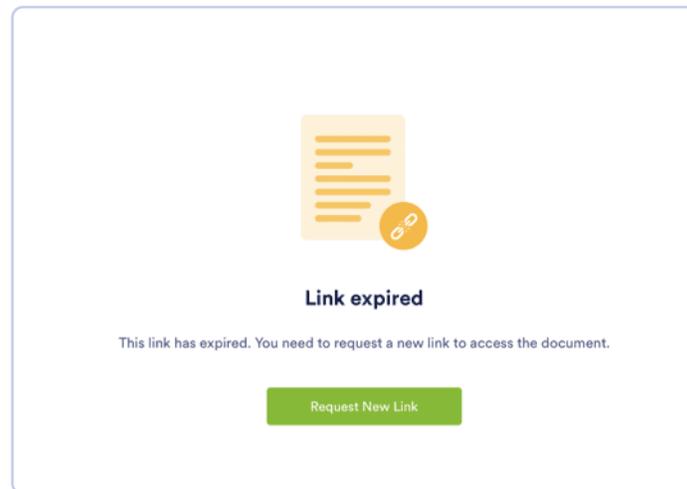


## Expiration Date

Setting an expiration date for your document can help with getting time-sensitive signatures. It can also act as another safeguard to keep your documents confidential. To set an expiration date, go to the Send tab and click **Options** on the **Send to Sign** page. From there, toggle the expiration date to “On” and pick your expiration date.



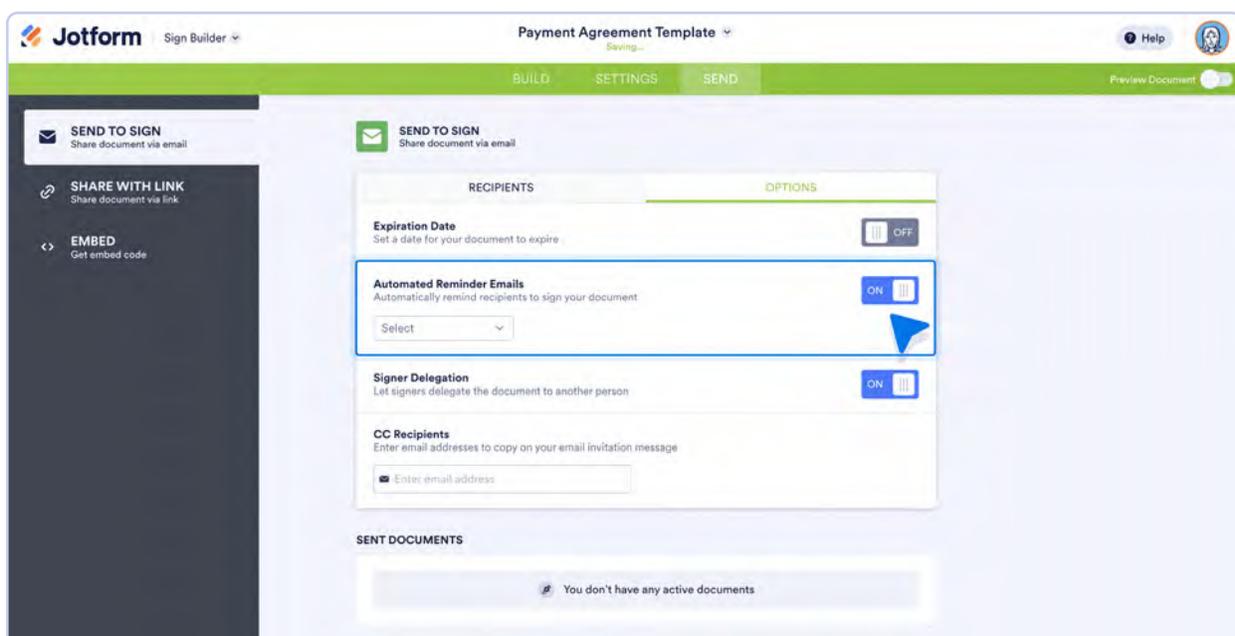
Keep in mind that your signer's unique URL will expire by default after seven days. If your signer tries to sign a document with an expired link, they'll get a message telling them as much along with an option to request a new one. Here's what it looks like from the signer's perspective.



## Auto-reminder

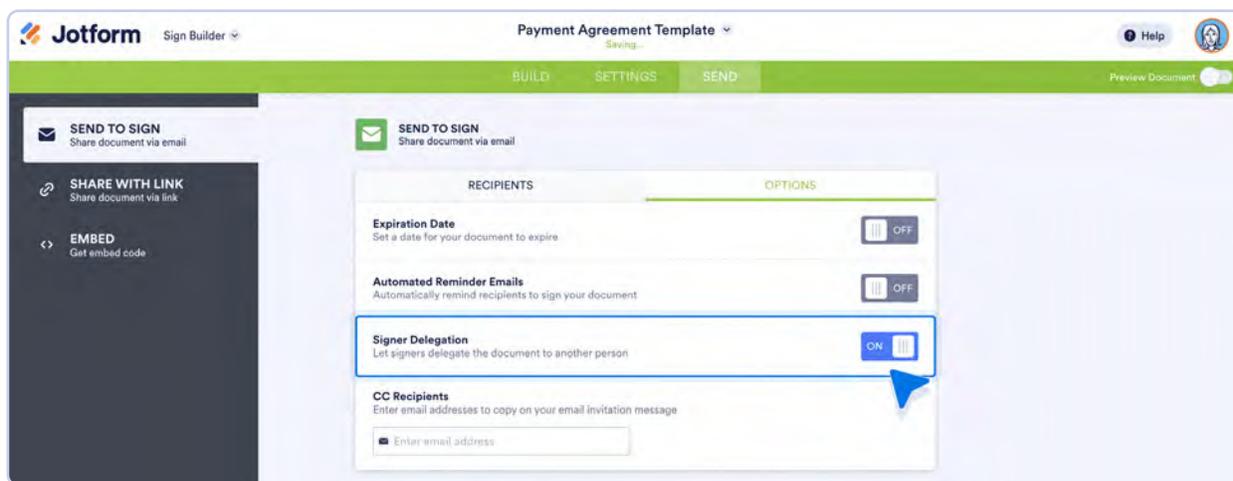
To further automate the signing process, you can set up reminder emails for your signers. Just set it and forget it. No need to manually nag people to keep them on track. Jotform will do the nagging for you!

When your document's ready to send, go to the Send tab and click Options. Turn on **Automated Reminder Emails** and select a frequency. You can choose anywhere between every day and every seven days.



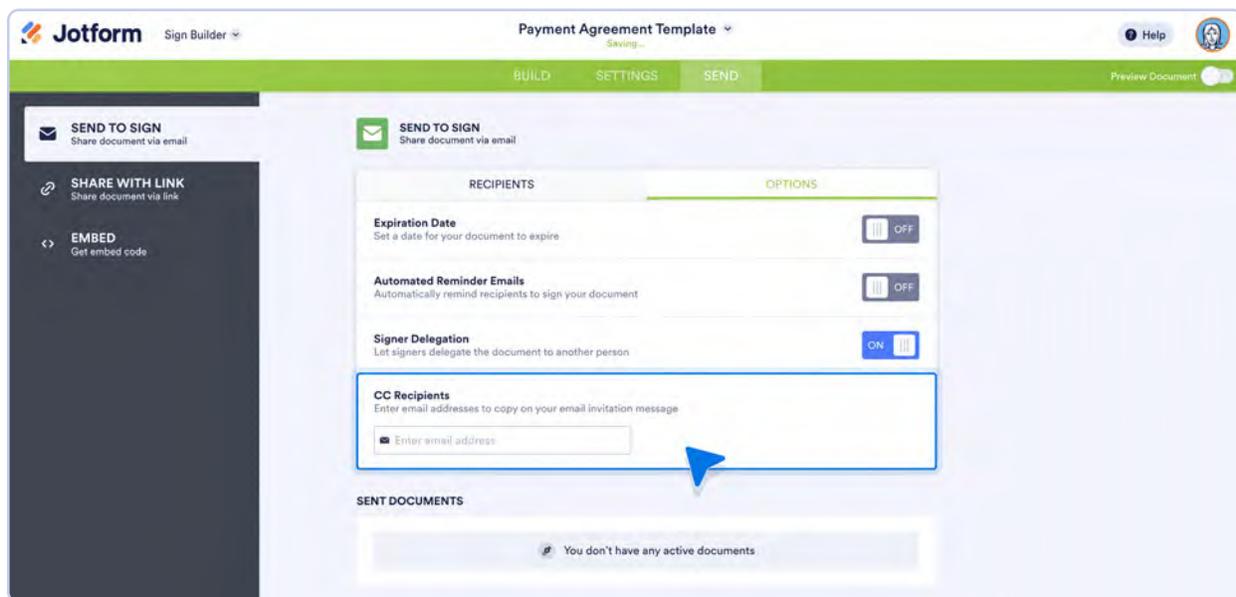
## Signer Delegation

Sometimes only one person can sign a contract, for example, the person leasing an apartment or an independent contractor signing a consulting agreement. But often, especially when a contract is sent to an organization, more than one person can sign it. In those instances, the **Signer Delegation** feature is helpful. To allow your signer to delegate the signing of the document to someone else, just toggle Signer Delegation to “On.”

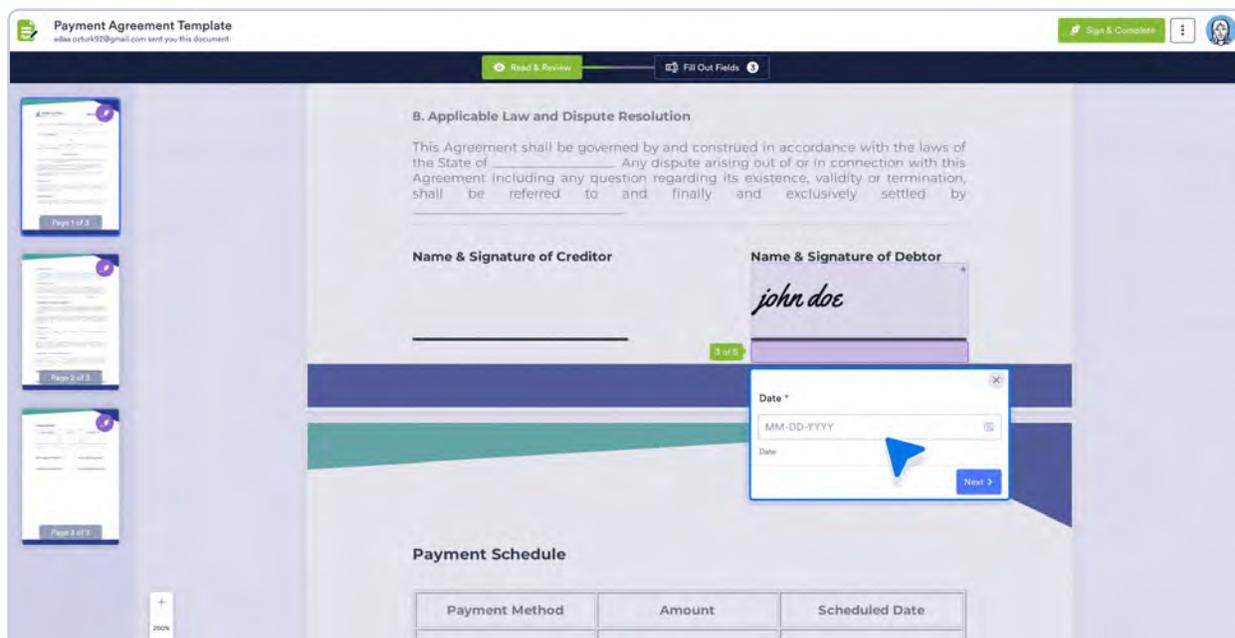


## CC recipient

Copying a recipient works just like CCing someone on an email. They can see the document and chime in if necessary. Type your CC recipient's email address on the CC line. When you send the document, they'll receive an email with a copy of the document. This makes it easy for all involved parties to keep copies of documents for their own records.

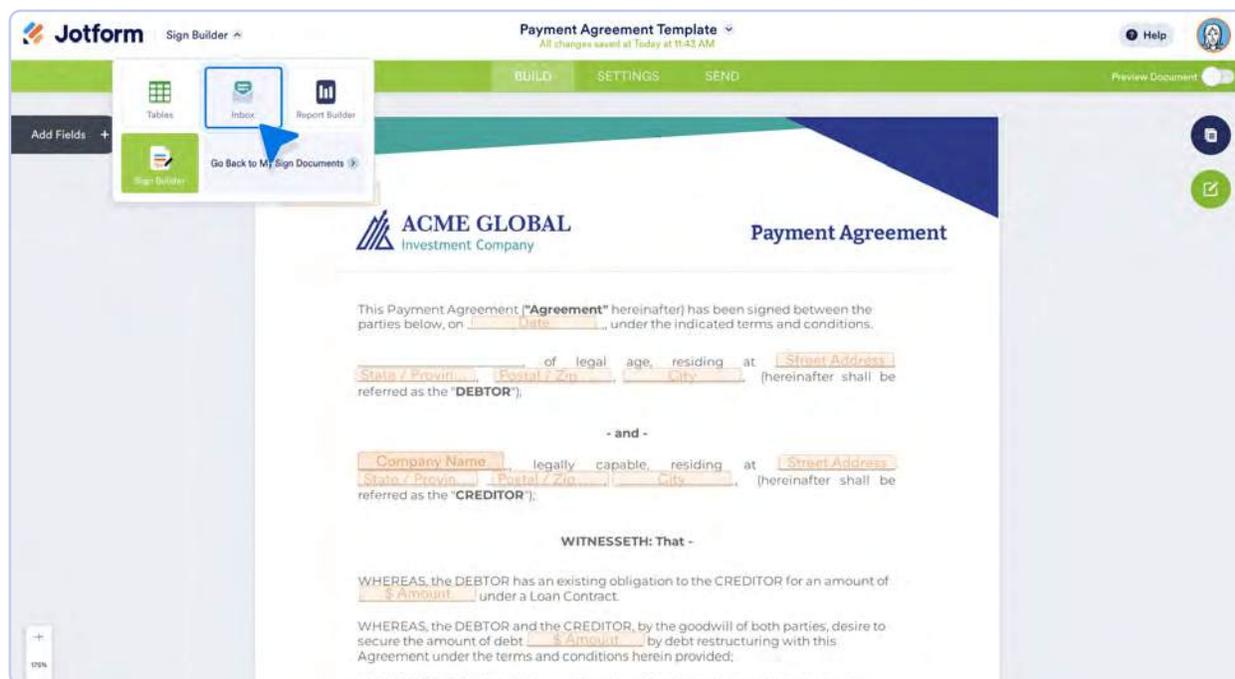


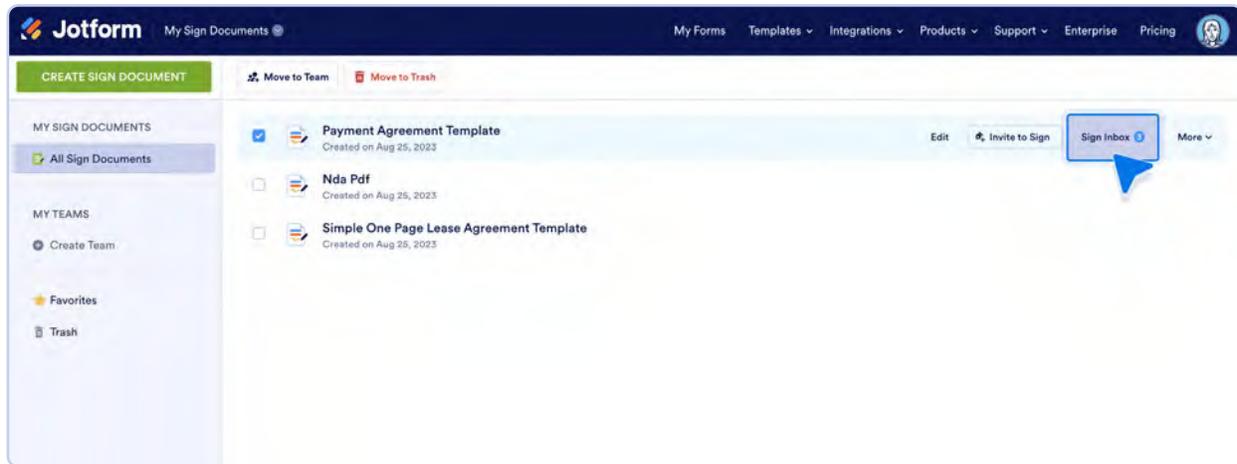
When you send a contract, your signers will each receive a unique URL to access the document. All they have to do is click the URL, and they will be taken to the contract and guided through the process, no need for them to scroll through the entire document.



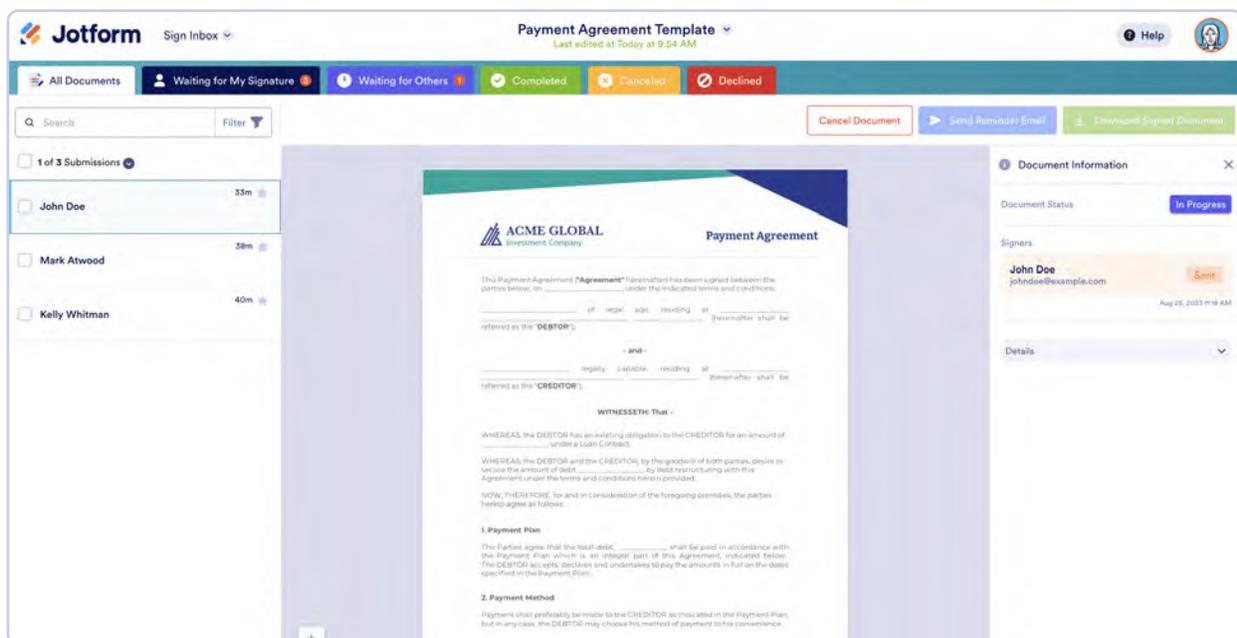
## Sign Inbox

You can access the Sign Inbox from the navigation menu on the top left side of the Sign Builder or by clicking **Sign Inbox** to the right of your document's name on the My Sign Documents page.





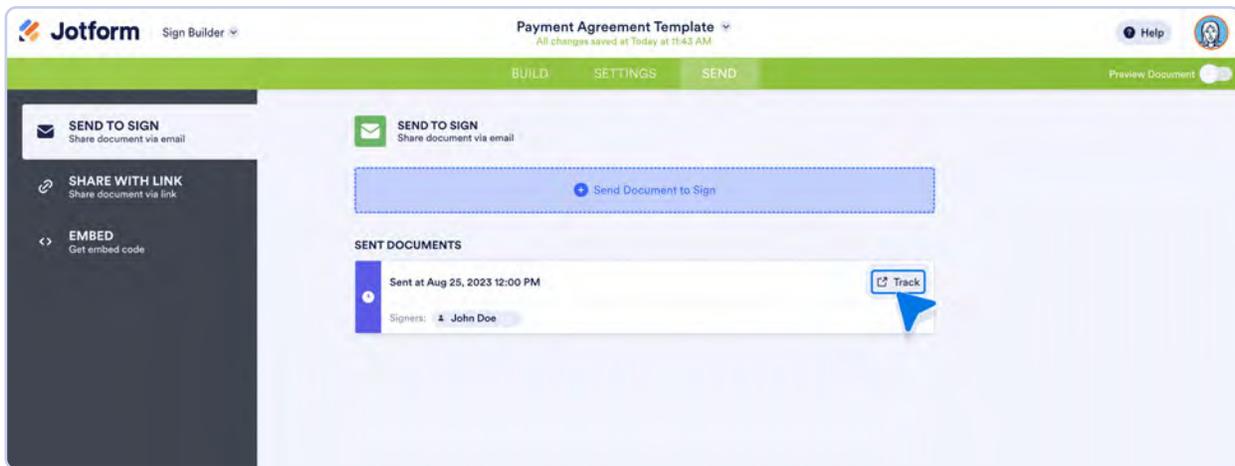
In the Sign Inbox, you'll see a few tabs, a search bar, a document information section, and the last document you sent for signing. The title of whatever document you have open in the inbox (at the top of the screen) also serves as a dropdown menu so you can easily navigate between documents to see audit trails and PDFs.



## Tracking the signing process

When you send a document for signing, you're not just sending it into the ether. With Jotform, you have the ability to track documents so you can keep an eye on where they are in the signing process.

There are two ways to track your documents. The first is directly from the document. Go to the Send tab in the Sign Builder and click the arrow box icon on the right side of the screen (when you hover over the arrow, it will say **Track**). This will take you directly to your document in the Sign Inbox.

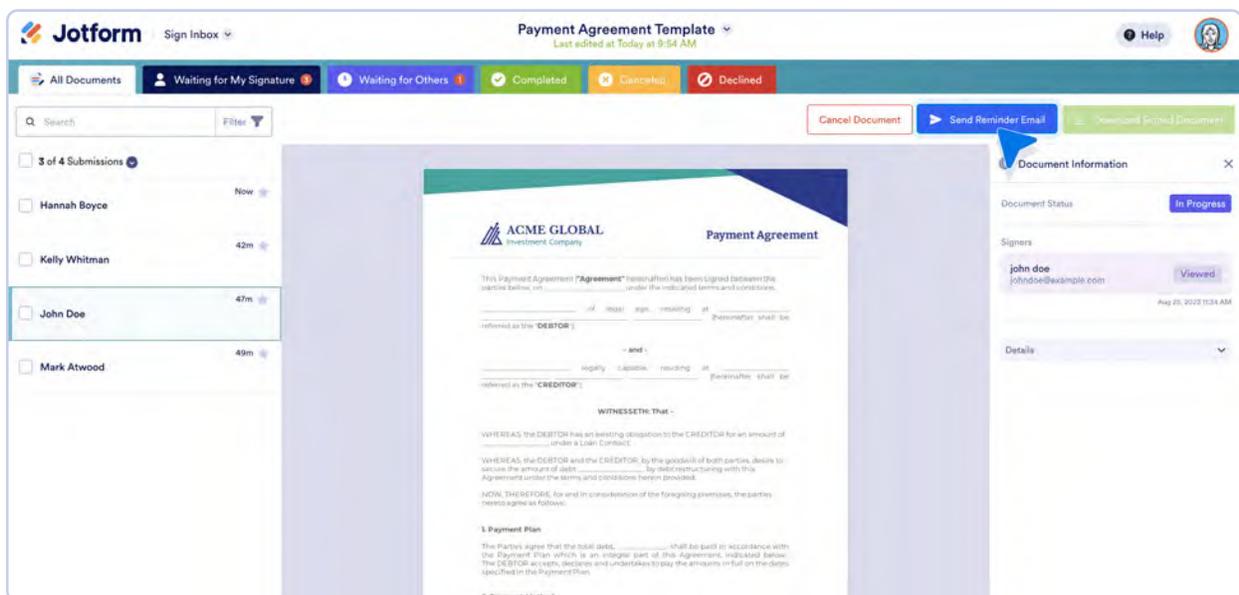


The second way to track your documents is from the Sign Inbox. Checking on documents in the inbox is helpful if you have a lot of documents to keep an eye on. You'll be able to quickly see where they are in the signing process at a glance. Let's dig into the Sign Inbox a little more.

## Tabs

Tabs are arranged according to where documents are in the signing process: **All Documents**, **Waiting for my Signature**, **Waiting for Others**, **Completed**, **Canceled**, and **Declined**.

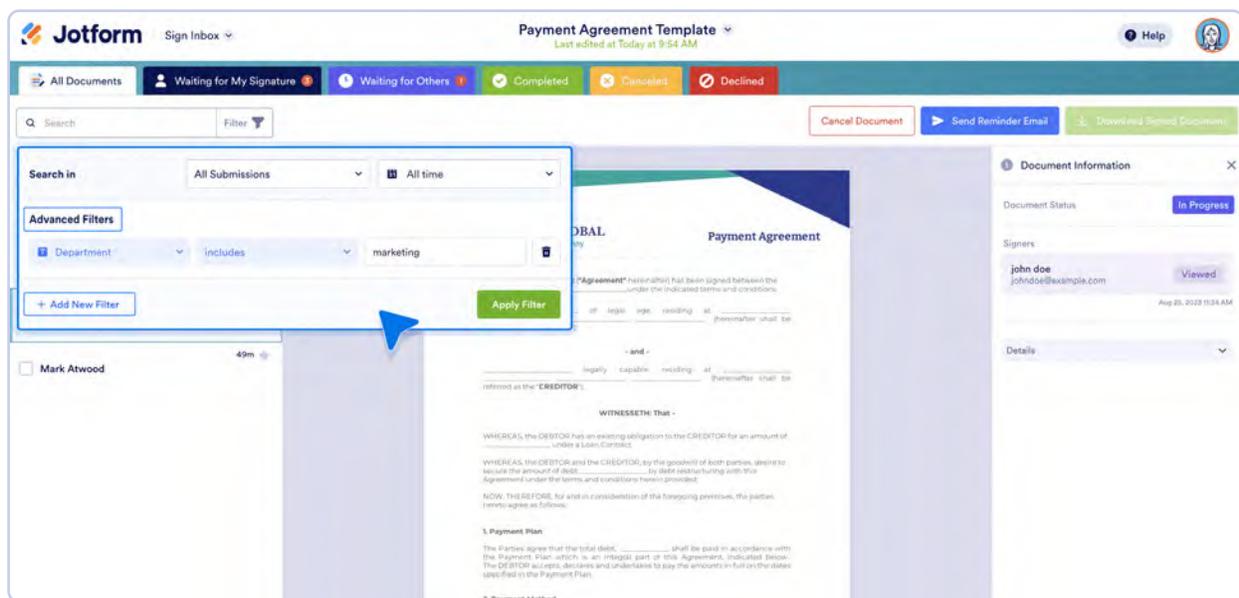
In the Waiting for my Signature and the Waiting for Others tabs, you can easily send your signers a reminder email if you haven't already scheduled them. You can also cancel the document or download it.



## Filter

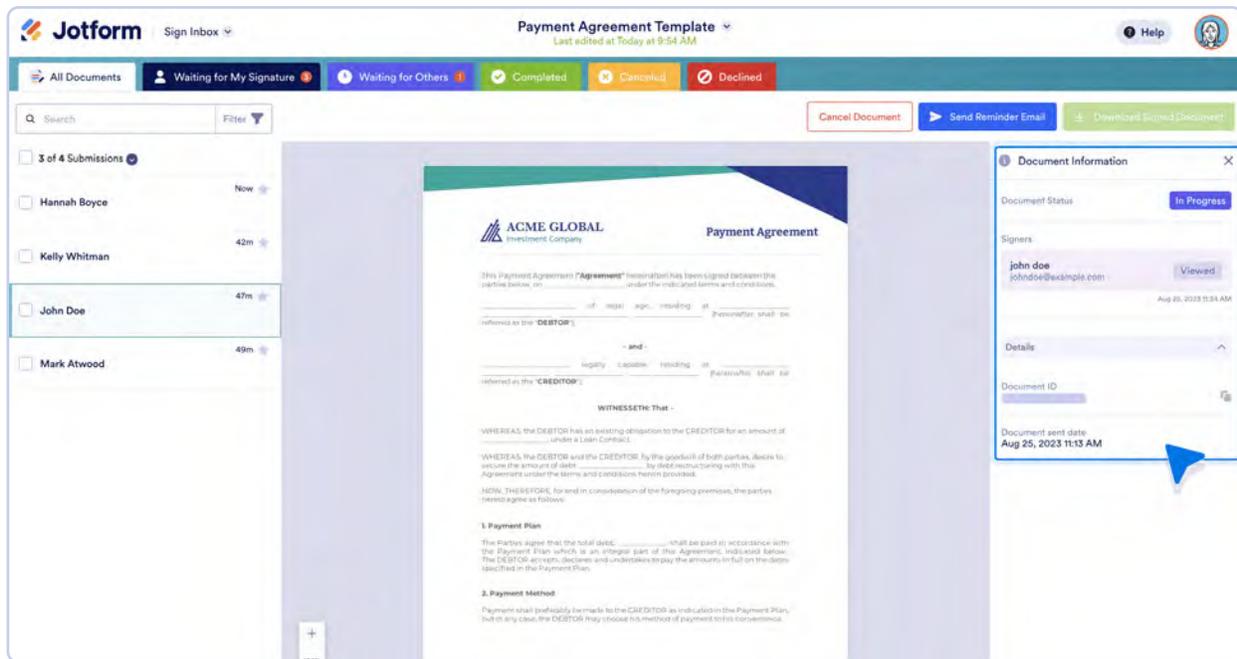
To the left of each tab is a filter that allows you to easily find your documents. You can narrow down your search by date, read, unread, favorited, and unfavorited documents.

If you want to narrow down your search further, go to the **Advanced Filters**. Whittle down the results by field, and make sure your search includes certain things. For example, if you want to know which of your employees from the marketing department signed your contract, select **Division and/or department**, change **equals** to **includes**, and type in “marketing.” Now you can see everyone from the marketing department who has signed and submitted your document. Click the **Add a New Filter** button to add another filter.



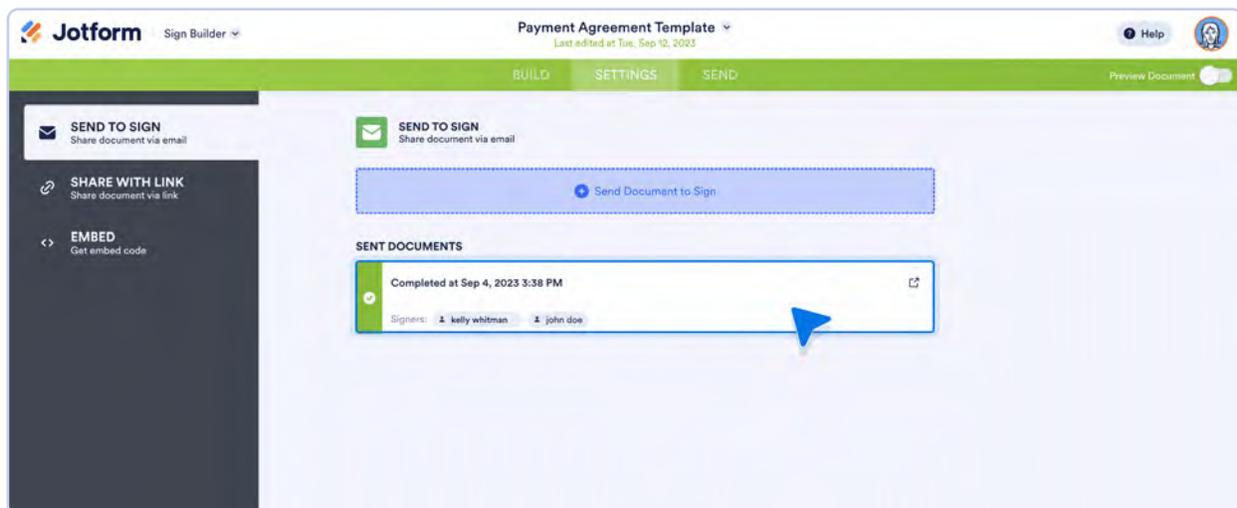
## Document Information

To the right of your PDF viewer, you can see all your document information. The **Document Information** section gives you an at-a-glance look at your document status, your signers, and where they're at in the signing process. When you click the **Details** dropdown, you'll see your document's unique ID (with a button to copy it to your clipboard) and the sent date.

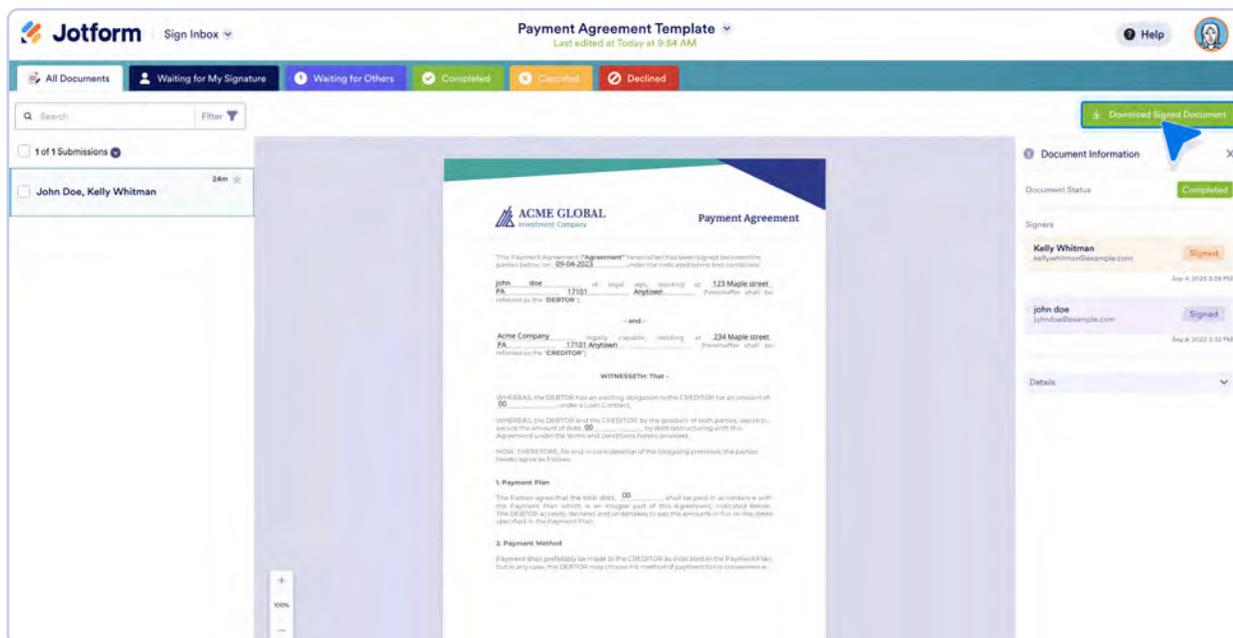


## Download Document

After all involved parties are done signing the document, you can download the document to save a PDF copy for your records. When your document has all the relevant signatures and is ready to download, it will turn green in the tracked documents section within the Send tab.



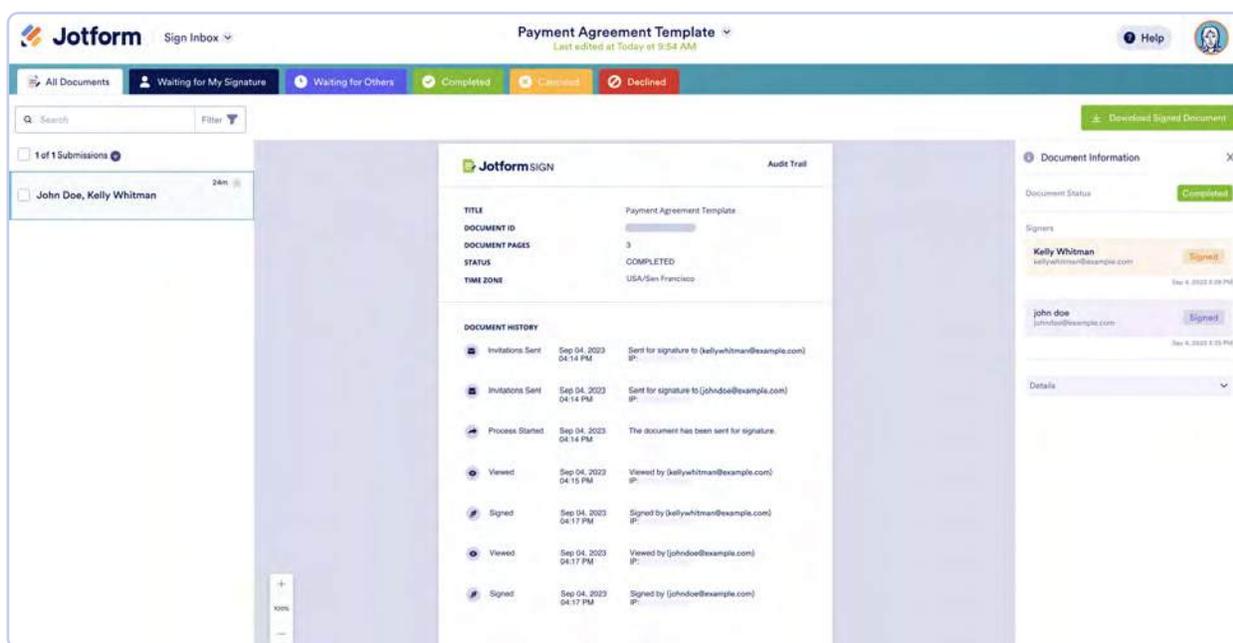
Click the arrow box icon to the right of the signed document. You'll be taken to your Sign Inbox where you can see a PDF copy of the signed document. Click the **Download** button to the right of the document to download it.



## Audit trail

Jeannine Smith at Body Brave uses Jotform Sign's Audit Trail for more security when she's collecting signatures: "We use Jotform Sign all the time. Having the audit trail and a signature captured feels more intentional than just asking somebody to click a checkbox."

Like Smith, you will most likely need some sort of documentation about when your document was signed, at what time, and by whom. This is where the audit trail comes in handy. You can download the audit trail from Jotform Tables and Inbox. The audit trail shows you when a document was sent, viewed, and signed.



## Using PDFs to your advantage

Taking your business paperless can be a big challenge. But Jotform makes it easy. Now you've got a tool that enables you to convert paper or PDF forms into online forms, send them to customers, and save the responses in the original PDF format. You can also use Jotform to create professional PDFs from form responses, draft contracts, collect e-signatures, and more. Everything you need to make your workflows work for you is in one place.

### Work cited

Global Newswire. *Digital Signature Market Growth is projected to reach USD 42 Billion by 2030, growing at a CAGR of 28%: Straits Research* (2022).<https://www.globenewswire.com/en/news-release/2022/06/30/2472311/0/en/Digital-Signature-Market-Growth-is-projected-to-reach-USD-42-Billion-by-2030-growing-at-a-CAGR-of-28-Straits-Research.html>

## Conclusion

# Automate, collaborate, and celebrate with Jotform Enterprise

While their missions may differ significantly, organizations worldwide have one thing in common: the need to succeed.

Maximizing efficiency and resources (capital, infrastructure, people, and time) can pave a path to success, but even that requires critical analysis. Deciding which new products and services to develop, which new audiences to pursue, and how to pursue them requires data.

Jotform Enterprise enables teams to collect and analyze information that can inform both their daily work and strategic decision-making across the organization. The no-code, drag-and-drop interface is simple and powerful: simple enough that anyone, regardless of technical ability, can use it and powerful enough that teams working around the world can leverage it to run mission-critical systems and revamp outdated systems.

With automation to streamline everything from inventory and e-signatures to workflows and applications, your teams will have more time to consider new strategic initiatives and smarter ways to further your mission.

“With Jotform Enterprise, your ROI is not just your return on financial investment, but your time as well.”

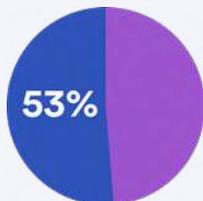
— James Barker, **Electrical Testing**



## How no-code automation fuels the future of work

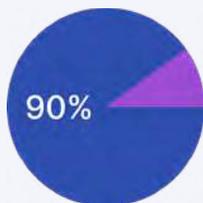
As new generations enter the workforce, they bring new expectations, forcing organizations to adapt to attract top talent. Millennials and Gen Zers are increasingly influencing workplace culture. Many of these workers have never known a time without the ability to be productive via computers or smartphones.

By investing in no-code software solutions, organizations can attract the best talent. These tools also allow employees to create custom solutions and automations that let them spend their time where it's most valuable. For instance, automation helps people managers complete administrative tasks so that they can continue making progress on strategic efforts.



**53% of the workday** is taken up doing “work about work”

Source: The Anatomy of Work Global Index 2023



**Nearly 90% of global employees** surveyed wished workplace software interfaces were as simple as using their favorite navigation app.

Source: *Human Resource Executive*

## Jotform Enterprise, a no-code platform for boosting team productivity

*Jotform Enterprise for Beginners* was created to break down our entire software suite into easy-to-follow, digestible chapters that inspire you to think creatively about increasing productivity.

Whether it's automated emails, machine learning that turns PDFs into e-signature documents, group approval workflows, conditional logic, or even your form's Thank You page, Jotform's automations streamline your workflows so you can spend more time on strategic matters.

As Chandler, Arizona, human resources manager Fernanda Acurio observed, digitizing paper forms and paper-based processes creates recurring savings:

“Jotform Enterprise has consistently helped us eliminate over 700 paper enrollment forms each year. Without Jotform, we would’ve had to send tons of paper enrollment forms, track them back down, and then manually enter them into our system. We’re very happy with Jotform Enterprise. It opens up new possibilities for better serving our community and employees.”

Plus, a wealth of third-party integrations enable collaborative decision-making. You can easily gather information on the front end and have it populate everything from new sales records to project management line items on the back end. For some third-party solutions, Jotform Enterprise even works in reverse, allowing you to distribute forms based on a name or line item entered into other software.

“We needed a solution that allowed us to store, manage, and manipulate information securely. It’s rare for data to stay in a data table. With Jotform Enterprise, we could easily integrate the data into our other systems.”

— Simon Morgan, Senior Manager, GIS (Geographic Information System) and Business Applications, **Three Rivers Park District**

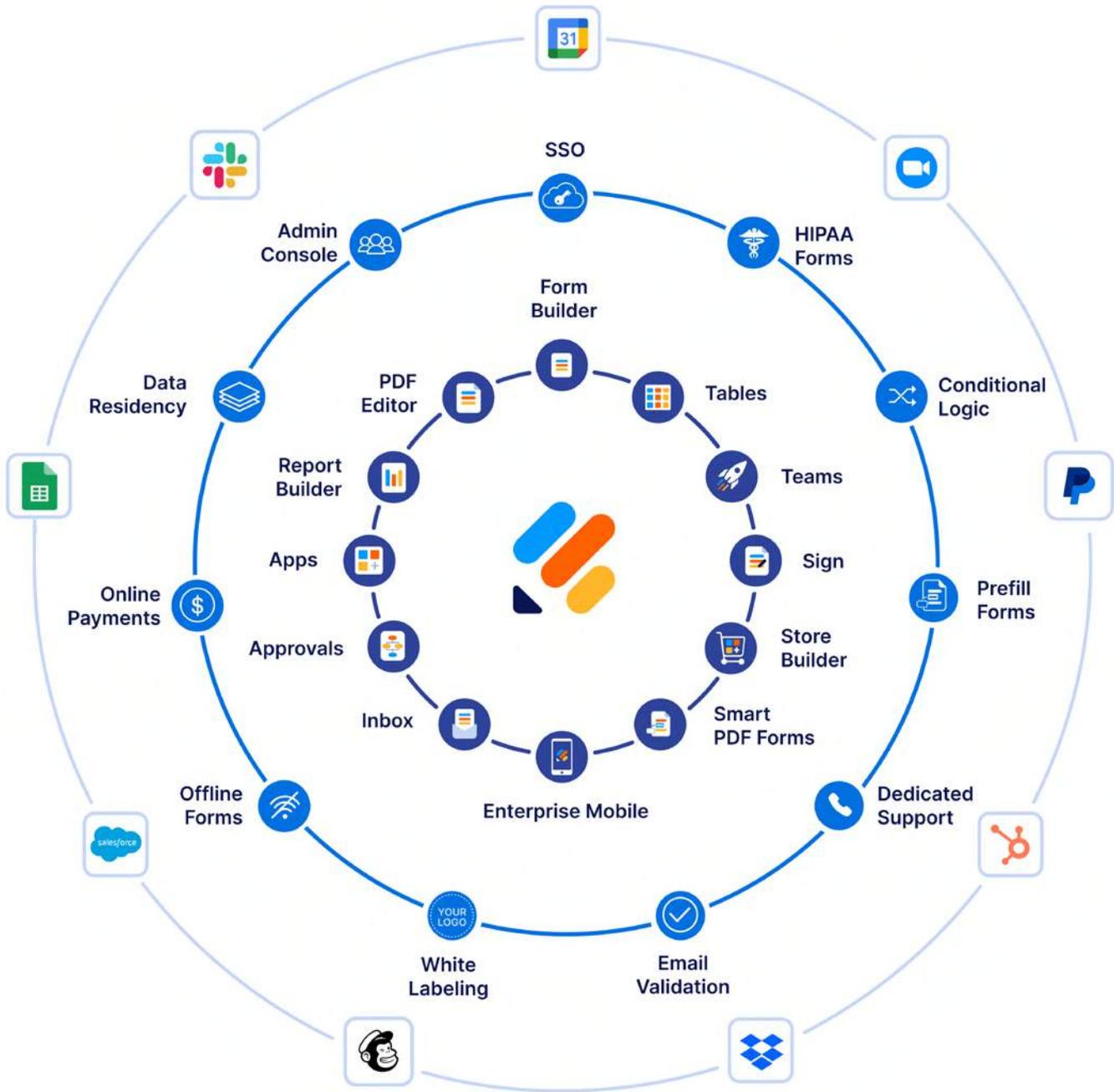
In addition, Jotform’s proprietary email, report generation, and project management solutions allow you to collaborate safely with smart features that cut down on administrative tasks.

Many organizations discover that using the full suite of Jotform Enterprise products allows them to cut technology costs. As mentioned at the beginning of this book, Body Brave was able to replace five platforms and save roughly five hours per week (120 hours in the first six months) on data collection and reporting alone.

“What makes Jotform Enterprise unique is the level of security it offers combined with the ability to use Jotform Tables, produce custom reports, and build conditional logic into surveys. We didn’t find anything as comprehensive with the level of security that we, as healthcare providers in Canada, need to deliver services. It’s incredibly useful.”

— Janine Smith, PMDip-Dietetics, RD, and Project Coordinator, **Body Brave**

## The Jotform Enterprise ecosystem of products, features, and integrations



■ Products

■ Sample Features

■ Sample Integrations

## Inspiring your imagination, today and tomorrow

Jotform is proud to be part of the no-code revolution, an ecosystem of hundreds of software solutions and apps, all focused on boosting your productivity and easing your workload.

Since 2006, staying true to our users' experience as they gather and manage digital information has helped us grow. By using our customers' workflow journeys and feedback as inspiration, we've dedicated ourselves to providing

- An approachable and feature-rich information management solution
- Endless connectivity and automation options to power any workflow
- Industry-leading product features and automations to accommodate every need

We hope the preceding pages have helped you learn how Jotform Enterprise can support your information collection, management, and collaboration needs. If you'd like to continue your journey, we invite you to explore the many other ways there are to learn about Jotform Enterprise.

- [Lunch and Learn sessions](#): Quick, focused, on-demand sessions led by our customer success experts. Fuel your body and your brain in about 30 minutes.
- [Jotform Enterprise FAQ](#): This searchable list of frequently asked questions provides another way to get answers to your questions.
- [Jotform Enterprise on YouTube](#): Watch Enterprise webinars, product overviews, and educational videos all in one place.
- [Jotform Enterprise blog](#): Read case studies, how-to tips, product announcements, and all the latest news from Jotform Enterprise on our blog.

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Barth, Jill. *Human Resource Executive* (Nov. 2, 2023). Survey says! Here's what workers think about AI right now. <https://hrexecutive.com/what-employees-think-about-ai-at-work/>