

New User's Guide

Everything You Need to Know to Get Started

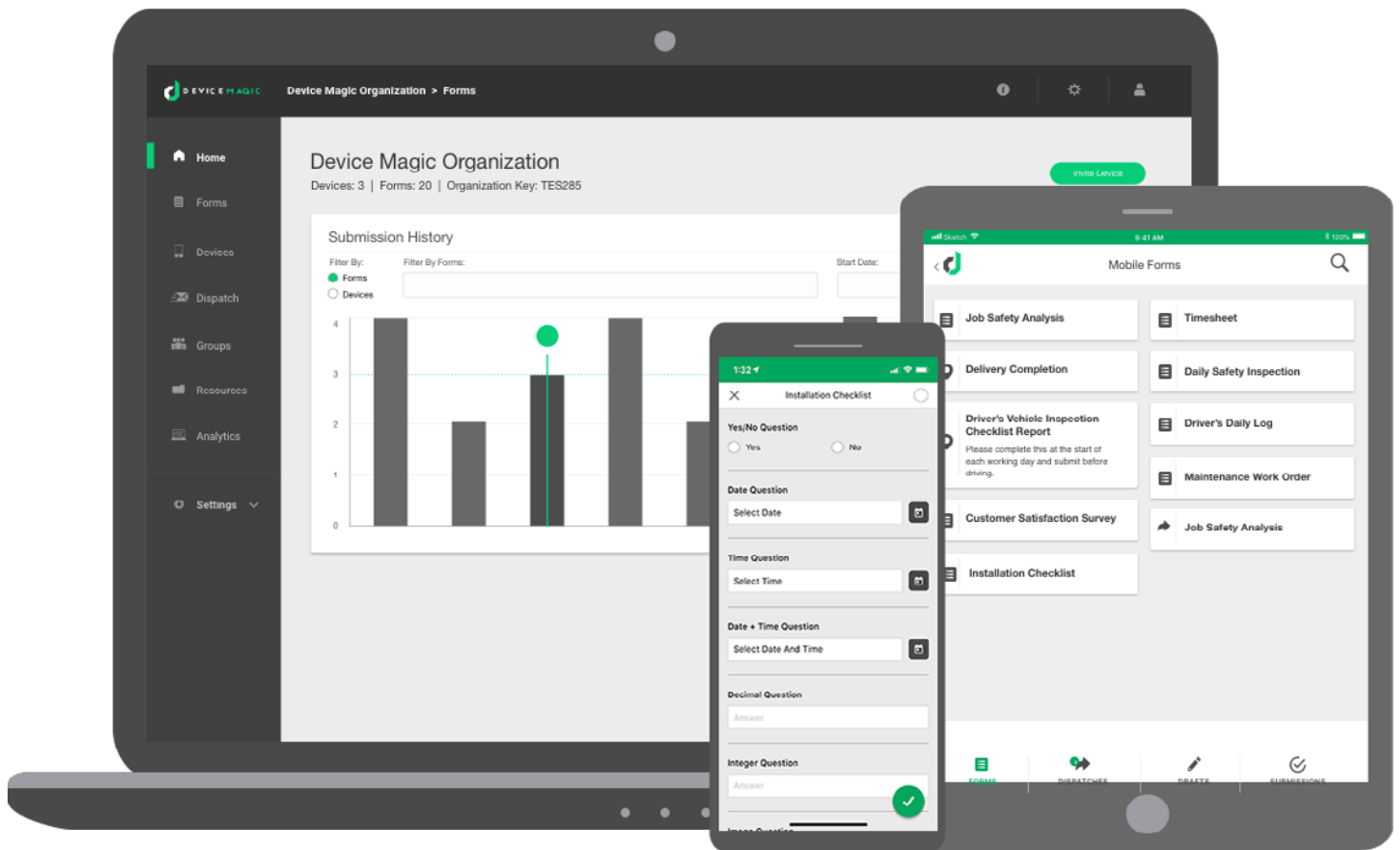


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AKA Your Official Device Magic “Starter Kit” Checklist

Welcome to Device Magic! Whether you're enrolled in our 14-day trial or you're already a new customer, we're here to make sure you get the most out of your experience. This is your “go-to guide” on everything you need to know to get started, along with helpful tips for the continued success of your digital data collection transformation.

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Connect

The “magic” happens within two primary interfaces:

- 1 Management Console**
- 2 Mobile Forms App**

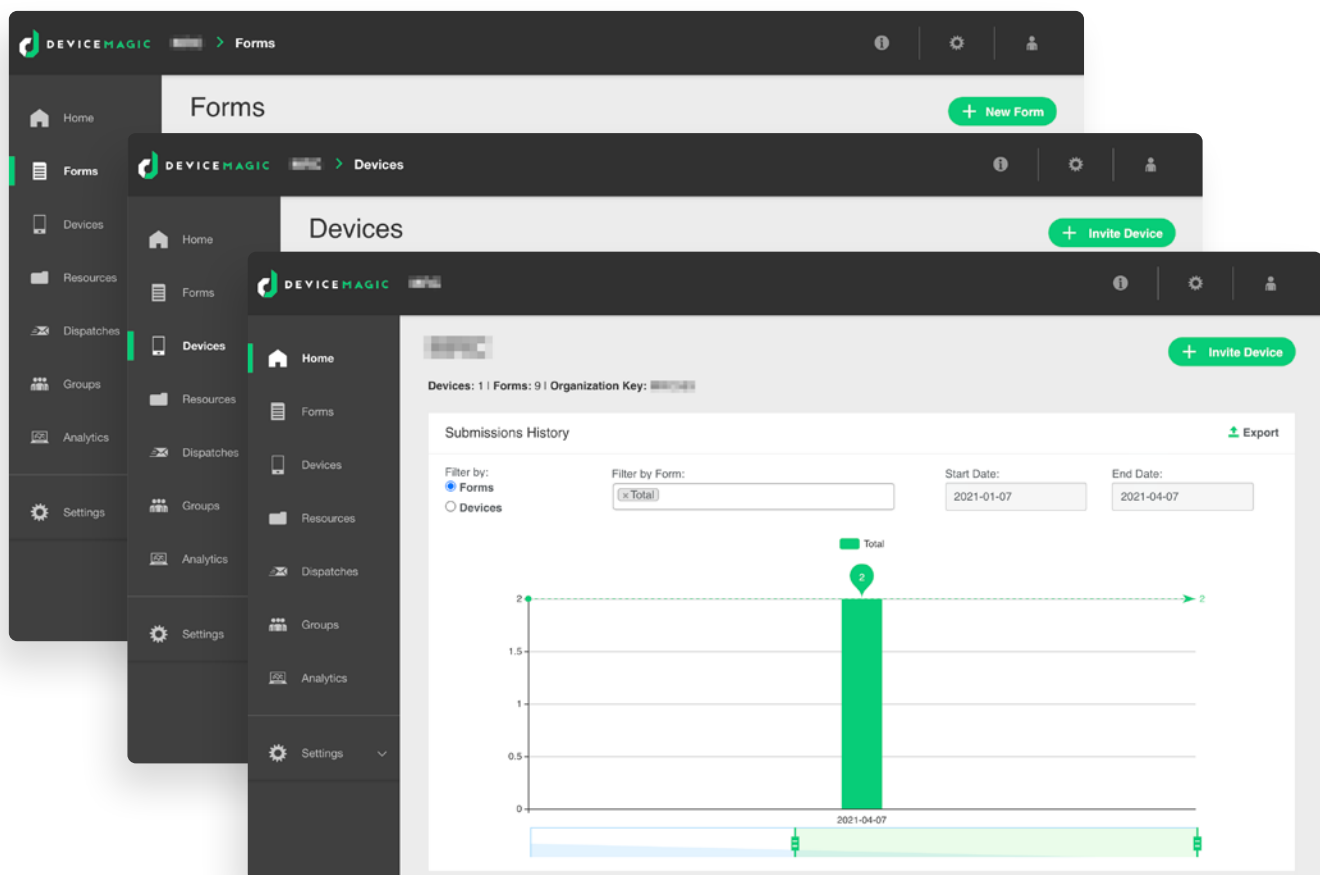
IN THIS SECTION, WE'RE GOING TO GET THE FIRST FEW ITEMS MARKED OFF YOUR CHECKLIST:

- ☐ [Log in](#) to your management console.
- ☐ Download the Device Magic mobile forms app.
 -  Download for iOS [here](#).
 -  Download for Android [here](#).
- ☐ Begin connecting device(s) to your organization.

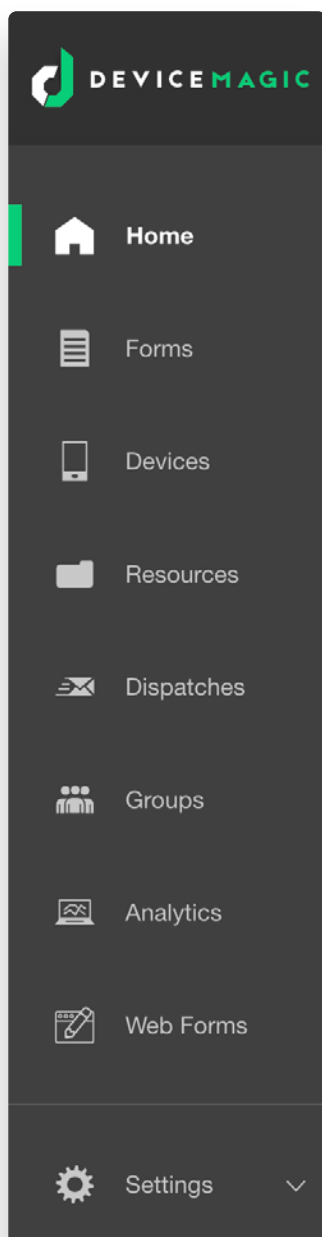
CONNECT

The Device Magic Management Console

Your management console is the main hub for your Device Magic account. For the best user experience, log into the management console from your laptop or desktop computer. This is where you will build forms, invite new devices, upload resources, create destinations and much more.



Navigating your Management Console



1 Home

View your Device Magic account information at-a-glance: your organization key, number of connected devices and created forms, form submission history, recent account activity and help center access.

2 Forms

Build and edit your forms using our drag-and-drop app builder.

3 Devices

Manage and configure all connected devices within your organization.

4 Resources

Upload and manage live resources that you plan to reference within your forms.

5 Dispatches

View a summary of all sent, scheduled and processing dispatches.

Dispatch is an automation feature available for trial participants and Enterprise plan users. It allows you to send forms with pre-populated data to notify field employees of new tasks.

6 Groups

View, create and organize your user groups to control which devices are able to access certain forms.

7 Analytics

Create and view charts to analyze your collected data.

8 Web Forms

Available for trial participants and Enterprise plan users, access, manage and submit forms from online devices, such as desktop computers and laptops.

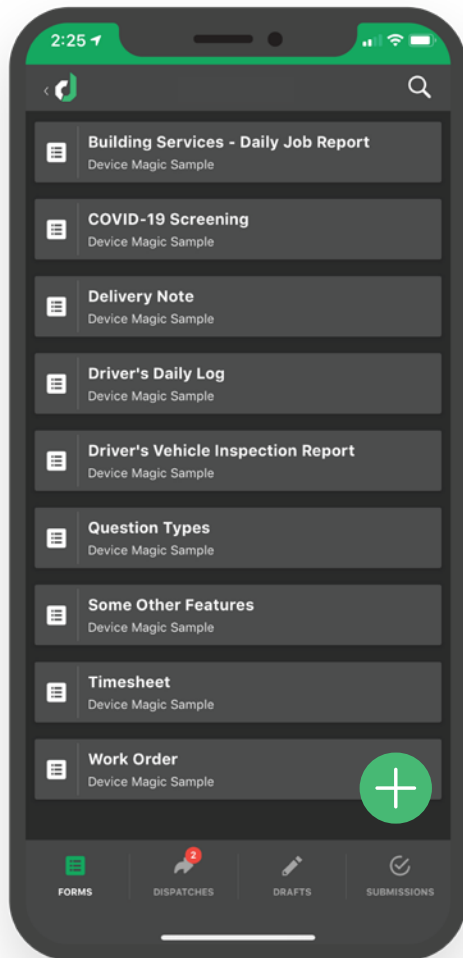
9 Settings

Configure your organization, billing, users & role management and API access settings. Access your settings in the top or sidebar navigation bars.

CONNECT

The Device Magic Mobile Forms App

Your mobile forms app is where you and your team can access your forms and start collecting critical data from the field. Here you'll collect signatures, images, sketches and almost any other data you used to compile with pen and paper.



Settings

Review your organization details and device settings; access the help center and our How To video library.



Search

Find specific forms, dispatches, drafts or submissions by title or description.



Forms

Access all the forms available on your device.



Forms Library

Access prebuilt forms and form templates available for a variety of use cases.



Dispatches

Access forms containing pre-populated information that have been specifically assigned to your device by the Organization administrator or an automated workflow.



Drafts

Access incomplete forms that you have saved to finish at a later time.



Submissions

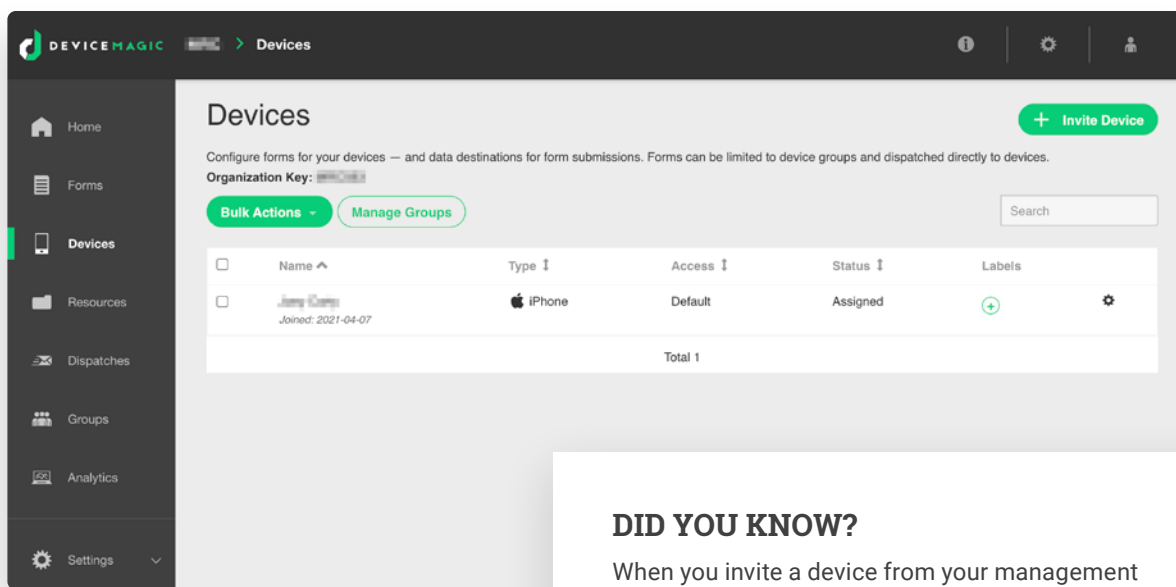
View a list of all forms submitted from your device.



CONNECT

Connecting a Device

Connecting a new device to your Organization is easy. You can invite someone to join from your management console or they can join when they download the mobile forms app.



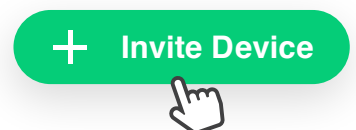
DID YOU KNOW?

When you invite a device from your management console, they will instantly get access to the forms you've built and assigned to that device once they join.

Option 1

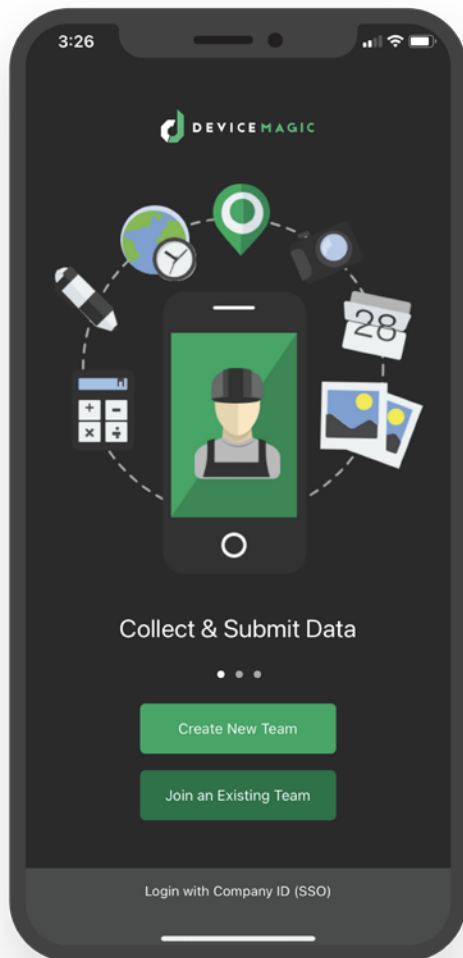
Invite a device from your management console.

- 1 Click the "Invite Device" button on your management console's homepage.
- 2 Enter the email address or phone number of the user/device you want to join your Organization. When you're done, click "Invite".
- 3 The device owner will receive a text message or email with a link directing them to download the mobile forms app and connect them to your Organization.



CONNECT

Connecting a Device Continued



DOWNLOAD THE APP

Download the Device Magic Mobile Forms app from iTunes or the Google Play store.

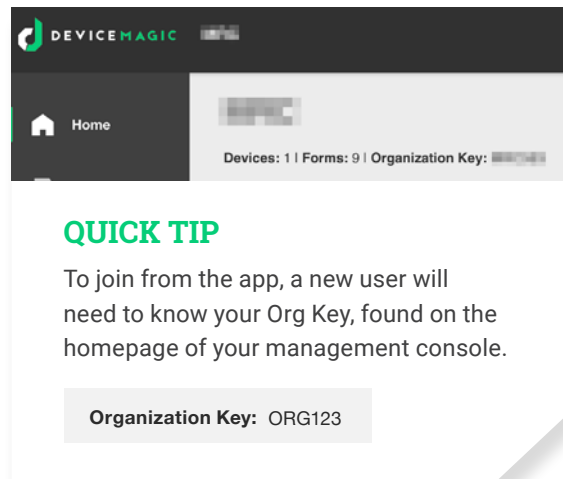


Option 2

Join an existing team from the mobile app.

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

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



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

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

Build

ALL RIGHT, YOU'VE EXPLORED THE MANAGEMENT CONSOLE AND MOBILE FORMS APP AND YOU'VE CONNECTED AT LEAST ONE DEVICE TO YOUR ORGANIZATION. IT'S TIME TO HIT THE NEXT FEW ITEMS ON YOUR CHECKLIST:

- ☐ Build your first form.
- ☐ Add a destination to your form.
- ☐ Create a custom template.

DID YOU KNOW?

Our team is happy to chat through use cases, walk you through a demo, or even build out your first form for free. Just let us know what you need - use the live chat option on our website, email sales@devicemagic.com or call us at (855) 257-9650.

BUILD

Build Your First Form

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

The screenshot displays the Device Magic form builder interface. On the left is a 'Toolbox (drag & drop)' containing various form field types: Free Text, Yes/No, Select, Date, Time, Date + Time, Decimal, Integer, Location, Email, Phone No., Image, Signature, Barcode, Sketch, Password, Calculated, Attached File, Repeat Group, and Sub Form. The main workspace is titled 'Delivery Note' and features a 'Form Fields' panel on the left with a list of fields: 'Delivery Note' (selected), 'Description of goods', 'Delivery location', 'Received By (Name)', 'Yes/No Question' (with a checkmark icon), and 'Signature'. A 'Properties' panel on the right shows 'Form Properties' with fields for 'Form Name' (set to 'Delivery Note') and 'Description' (set to 'Device Magic Sample'). A 'Preview' tab is also visible. A 'QUICK TIP' box in the bottom right corner provides guidance on using preloaded demo forms.

QUICK TIP

When you first log into your account, you'll notice several preloaded demo forms. You can save, delete or customize these forms or start new ones from scratch. Whatever best suits your business needs!

BUILD

Build Your First Form Continued

The Forms Builder Menu

Visit the “Forms” page in your management console and click “+ New Form”. You will be taken to the form builder where you create and edit your Organization’s forms.

+ New Form



CUSTOMIZING YOUR QUESTION FIELDS

Your questions can be renamed to give it the label of your choice. Every question has advanced settings that you can adjust to suit your needs. You can learn more about all of your question types [here](#).

SAVING YOUR FORMS

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

BUILD

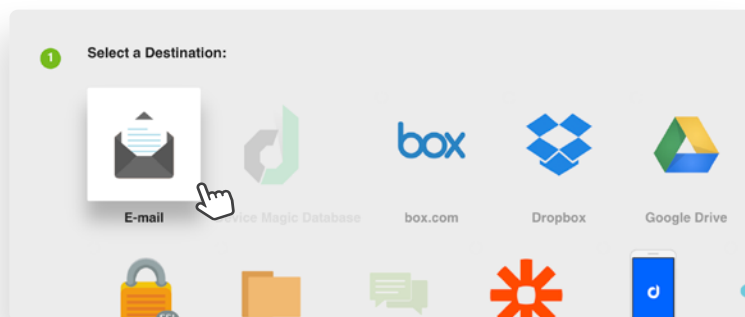
Add a Destination to Your Form

Destinations are the end point for your submission data: the final outcome. This is where all your information, signatures and/or images will be delivered.

How to Setup a Destination

- 1 To set up a Destination for your form, go to the "Forms" tab in your management console.
- 2 In the Destinations column, click the hyperlinked number for the form to which you would like to add the Destination.
- 3 Once on the Destinations page, click "New Destination".
- 4 You will then be taken to the Destination setup page where you can select where you want your data to be sent and the submission format.

<input type="checkbox"/>	Name ^	Submissions ↓	Destinations ↓	Updated ↓	Groups ↓
<input type="checkbox"/>	Building Services - Daily Job Report <i>Device Magic Sample</i>	0	2	2021-04-07 17:29 UTC	Default
<input type="checkbox"/>	COVID-19 Screening <i>Device Magic Sample</i>	1	2	2021-04-07 17:29 UTC	Default
<input type="checkbox"/>	Delivery Note <i>Device Magic Sample</i>	0	2	2021-04-07 17:29 UTC	Default



View our full list of available submission destinations and formats by Device Magic plan level [here](#).

BUILD

Creating and Using Custom Templates

If you're like many of our users, you may need to customize your report outputs.

Device Magic offers the ability to customize PDF, Microsoft Word or Excel versions of your submission data. By creating and uploading your own template to a specific destination, you will be able to make the layout of your report match your original form more closely or create a completely new format.

CUSTOM TEMPLATE TUTORIALS

We have compiled step-by-step video and article tutorials to help you create custom reports using our template options. Visit the links below to get started.

Custom Word or PDF Reports:

[Video Tutorial](#)

[Article Tutorial](#)

[Use Case Examples](#)

Custom Excel Reports:

[Video Tutorial](#)

[Article Tutorial](#)

[Use Case Examples](#)

The image shows a desktop computer screen and a smartphone. The desktop screen displays a web form for 'COMPANY NAME' with fields for customer information, order number, and a table for work description. The smartphone displays a mobile app interface for 'Building Services - Daily Job Report' with fields for date, contract number, title, superintendant, contractor, and terrain conditions (Dry, Water, Snow, Mud, Frozen).

Submit

GRAB YOUR SMARTPHONE. WE'RE GOING TO HEAD OVER TO THE MOBILE FORMS APP TO COMPLETE THE FINAL ITEM ON YOUR CHECKLIST.

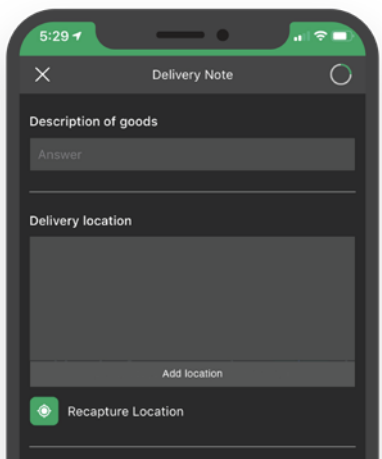
- ☐ Submit your first form.



SUBMIT

Submitting Your First Form

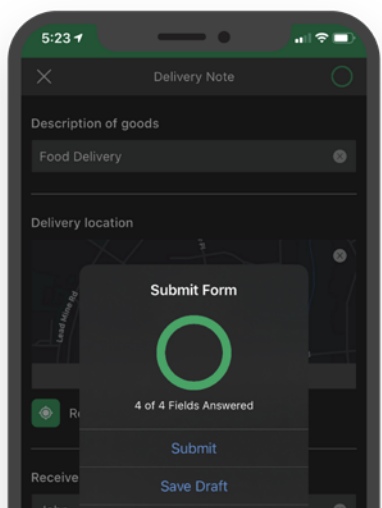
Completing your first form is simple. Open your Device Magic Mobile Forms app on your device, find the form you want to complete, and start answering questions.



Filling Out a Form

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

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



Submitting a Form


Your newly submitted form will be placed in a queue to be submitted to the server. As soon as you connect to Wi-Fi, the form will disappear from the queue.

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

FAQs

CHECK OUT SOME OF OUR FREQUENTLY ASKED QUESTIONS ON THE FOLLOWING PAGES. AND IF YOU HAVE ANY ADDITIONAL QUESTIONS, DON'T HESITATE TO REACH OUT.

 sales@devicemagic.com

 (855)257-9650

Frequently Asked Questions

1 Is there a limit to the number of forms you can build?

There are no restrictions on the number of forms you can build. Device Magic offers unlimited forms, submissions and data storage starting from the free, entry-level plan.

2 What devices are compatible with Device Magic?

Device Magic has native forms apps for both iOS and Android devices. It can be downloaded in either Google Play or the Apple App Store. Device Magic's web management console and web forms can be accessed on any internet-connected digital device.

3 Do you have the ability to segment forms by crews or departments to avoid confusion?

Yes, you can [create user groups](#) to segment your teams and control who has access to which forms in their mobile forms app. The account administrator can determine permissions and access for each user on the account.

Once you create a form on your account, you can share it across all of the devices associated with your account. Or, you can make the form available for only the specific devices or users you choose.

4 Is the licensing based on users or devices?

Licensing is available on a per device per month plan. You can find more information about our plans [here](#).

5 Can you pre-populate multiple forms using the Dispatch feature?

[Dispatch](#) lets you send forms with pre-populated data to notify employees in the field or on the road of new tasks. You can send one partially completed form to one person or multiple connected devices. The form can include key information such as the job site, a description of the task and the customer name. After your employee completes the job, they finish filling out the form and submit it.

6 Are you able to sketch on an image taken within a form?

When you're building a form with a Sketch Question, it will appear on a user's devices with the option to take a photo in the moment or upload one on which they can then draw or annotate.

FAQS

Frequently Asked Questions Continued

7 Will Device Magic integrate with my current software systems?

Device Magic has an API and several pre-built integrations, as well as the ability to sync existing databases via SQL. It's easy to get started integrating Device Magic with your current software systems. Just authenticate your account, walk through a quick set-up, and start submitting mobile forms data directly into your existing systems. Learn more about our integrations [here](#).

8 Can I customize the app with my own company branding?

Yes, you can through our white labeling services. Learn more about our white label solutions [here](#).

9 What data security and privacy measures do you have in place?

Data security is our top priority. Device Magic data is encrypted and securely stored with Amazon Web Services. These secure servers are deployed across multiple availability zones, so we are resilient against any single data center failure. We also integrate with Secure File Transfer Protocol (SFTP) to allow you to use its system to securely transfer data to your own servers. Learn more about our security measures [here](#).

10 Where can I get help or further assistance?

The Device Magic team is ready and available to help! You can reach our support team 24/7 through the in-app chat function. We're also available to walk you through a demo or build your first form for free. Contact us at sales@devicemagic.com or (855) 257-9650 to let us know how we can help.