

QUICK-START GUIDE

How To - Create and Use a SmartForm

Email: sales@accompa.com

Website: www.accompa.com

Call: +1-408-689-8231

HOW TO - CREATE AND USE A SMARTFORM

SmartForms are customized web forms that you can create to automate gathering of feature requests from your customers and internal teams (such as Sales and Support). These requests are automatically converted into requirements in your Accompa account to save you valuable time.

We have written this Quick-Start Guide to give you an introduction to using SmartForms in Accompa to perform 3 key actions.

1. Create a New SmartForm
2. Edit a SmartForm
3. Launch & Use a SmartForm to Gather Feature Requests

I. Create a New SmartForm

To add a new SmartForm, first click the “AutoCapture” tab at the top—as shown in Figure 1.a below. Then click one of the “Add SmartForm” links shown in Figure 1.a below.

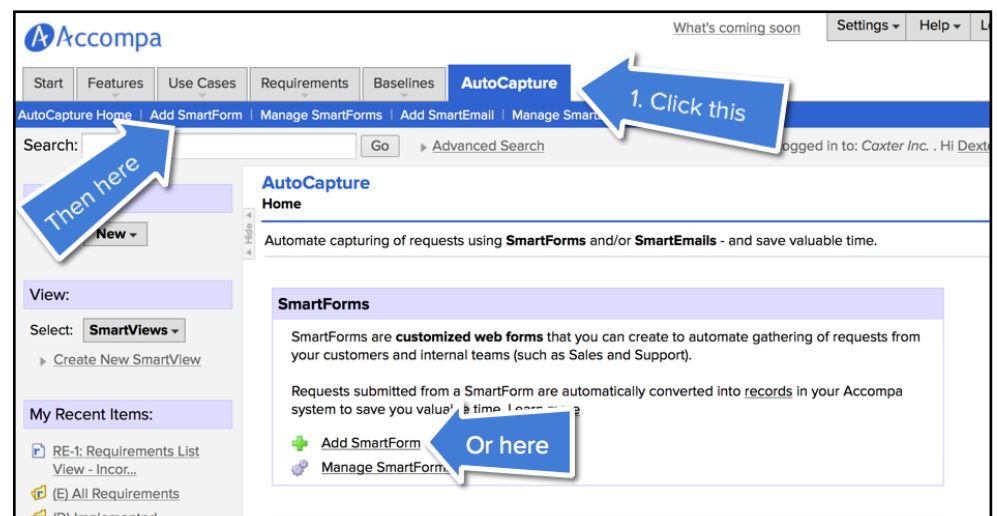


Figure 1.a – “AutoCapture” Tab & “Add SmartForm” Links

This will take you to “Add SmartForm” page—where simply complete the required fields, and click the ‘Save’ button when you’re done. It is that easy!

Tips & Example for Completing ‘Add SmartForm’ Page:

Here are some tips for completing the ‘Add SmartForm’ page, including an example.

Let us say you wanted to create a SmartForm to gather feature requests for one of your products called **WonderWidget** from your customers—

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and automatically convert these requests into “Requirements” in your Accompa system.

Let us also assume that you wanted the customer to enter a brief **Title** for their feature request, as well as a detailed **Description**. In addition, you wanted to ask the customer to optionally enter his/her contact info (**Name** and **Email**), as well as attach a file/image. Further let us assume that WonderWidget is one of four products that you’re managing using Accompa.

Here is an example of how you’d complete the fields in “Add SmartForm” page in Accompa to achieve the above goals:

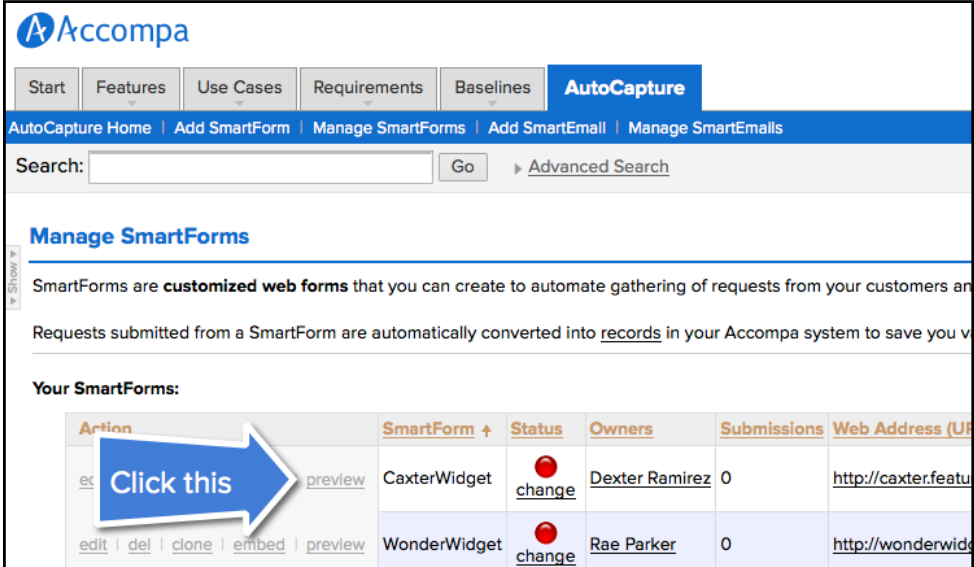
Field	Entry			
(1) Enter Basic Information				
Web Address (URL)	wonderwidget			
Data to Gather	Requirements			
Form Title	Feature Request for WonderWidget			
Form Instructions	Welcome! Please use this form to let us know what features and enhancements you’d like us to make.			
Attachments	Allow			
(2) Define Fields				
Hidden Fields				
<input checked="" type="checkbox"/> Accompa Field	<input checked="" type="checkbox"/> Value Action			
<input type="text" value="--None--"/>	<input type="text"/> <input checked="" type="button" value="X"/>			
Add Hidden Field				
Visible Fields				
<input checked="" type="checkbox"/> Accompa Field	<input checked="" type="checkbox"/> Field Label	Field Instructions	Required?	Action
<input type="text" value="--None--"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="▲"/> <input type="button" value="▼"/> <input checked="" type="button" value="X"/>
Add Visible Field				

Please note that you’ve pre-set “Products” field to “WonderWidgets” via **Hidden Fields** section to save a step for users who complete your SmartForm. Whenever a user submits this SmartForm—the “Product” field of the submission will be automatically set to “WonderWidget.”

Tip 1.1:

You may also use **Hidden Fields** section to set “Status” field of requirements that are automatically created when a user submits this SmartForm to something like “SmartForm Submission Pending Review.” Then, you can create a SmartView using this as Filter Criteria (Status = SmartForm Submission Pending Review)—and use this SmartView to display all requirements created via SmartForm submission for further review by your product managers, *et al.*

Click ‘Save’ button after completing the fields in “New SmartForm” page as shown above. In the resulting page, click “preview” link to preview your SmartForm.



The screenshot shows the Accompa web interface. At the top, there is a navigation menu with tabs: Start, Features, Use Cases, Requirements, Baselines, and AutoCapture (which is highlighted in blue). Below the menu is a search bar with a 'Go' button and a link to 'Advanced Search'. The main content area is titled 'Manage SmartForms' and contains a brief description of SmartForms. Below this is a table titled 'Your SmartForms:' with the following columns: Action, SmartForm, Status, Owners, Submissions, and Web Address (URL). The table contains two rows of data. A blue arrow with the text 'Click this' points to the 'preview' link in the 'Action' column of the first row.

Action	SmartForm	Status	Owners	Submissions	Web Address (URL)
edit del clone embed preview	CaxterWidget	change	Dexter Ramirez	0	http://caxter.featu
edit del clone embed preview	WonderWidget	change	Rae Parker	0	http://wonderwidg

Figure 1.b – “Preview SmartForm” Link

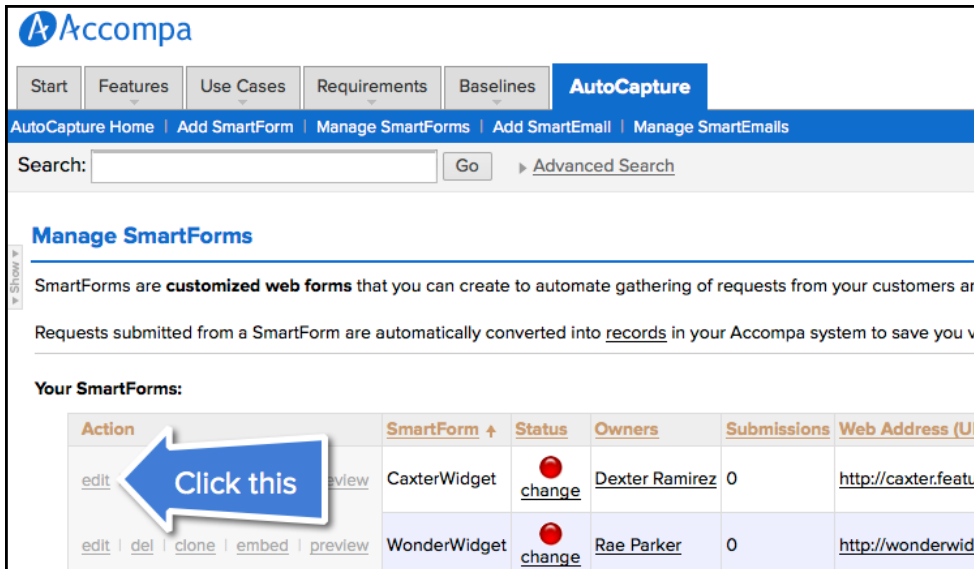
Please note that your users will not be able to access this SmartForm via its “Web Address” of <http://wonderwidgets.featureidea.com> until you set its “Status” to “Launched” as explained in section-3 of this Quick-Start Guide.

II. Edit a SmartForm

To edit SmartForms that are already in your Accompa system, click on the “AutoCapture” tab at the top—as shown in Figure 1.a in page 2.

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The resulting page will show a table of your SmartForms as shown in Figure 2.a below.



The screenshot shows the Accompa web interface. At the top, there is a navigation menu with tabs for 'Start', 'Features', 'Use Cases', 'Requirements', 'Baselines', and 'AutoCapture'. Below the menu is a search bar with a 'Go' button and a link to 'Advanced Search'. The main content area is titled 'Manage SmartForms' and contains a brief description of SmartForms. Below the description is a table titled 'Your SmartForms:' with the following columns: Action, SmartForm, Status, Owners, Submissions, and Web Address (URL). The table contains two rows of data. A blue arrow points to the 'edit' link in the 'Action' column of the first row.

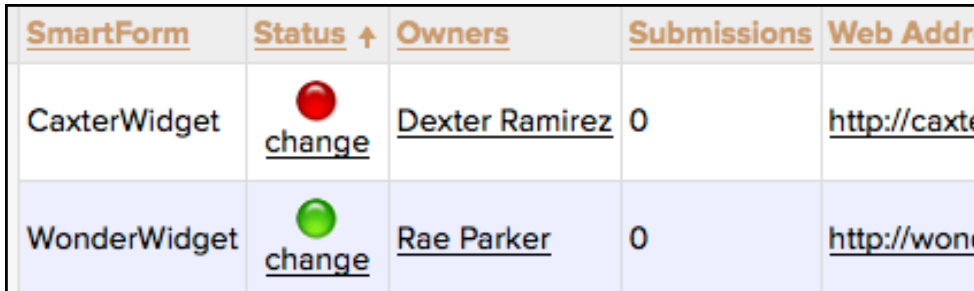
Action	SmartForm ↑	Status	Owners	Submissions	Web Address (URL)
edit view	CaxterWidget	● change	Dexter Ramirez	0	http://caxter.featu
edit del clone embed preview	WonderWidget	● change	Rae Parker	0	http://wonderwid

Figure 2.a – “Edit SmartForm” Link

In this table, click ‘edit’ link next to the desired SmartForm. In the page that opens edit the SmartForm as necessary and click ‘Save’ button. Then ‘preview’ the SmartForm as shown in Figure 1.b in page 4. Repeat this process until you’re satisfied with the SmartForm and are ready to launch it to the world!

III. Launch & Use a SmartForm to Gather Feature Requests

Once you’re ready to launch a SmartForm—click ‘edit’ link as shown in Figure 2.a in page 5, then change “Status” field to “Launched” and click ‘Save’ button. In the resulting page, you should see a table as shown below in Figure 3.a.



The screenshot shows a table with the same columns as in Figure 2.a. The 'Status' field for both SmartForms has changed to 'Launched', indicated by a green dot and the word 'change'.

SmartForm	Status ↑	Owners	Submissions	Web Address (URL)
CaxterWidget	● change	Dexter Ramirez	0	http://caxter
WonderWidget	● change	Rae Parker	0	http://wonder

Figure 3.a – SmartForm After Launch

As shown in Figure 3.a, the “Status” will be shown as “Launched.” You can click the link in the “Web Address (URL)” field, as shown in Figure 3.a above, to see a live version of the SmartForm.

Voila - that is all there is to it!

You can now promote this “Web Address (URL)” (<http://wonderwidgets.featureidea.com> in the example above) to your customers to encourage them to give you direct feedback on product features. Some ways to promote this “Web Address (URL)” include:

- Display it on your website.
 - Likely pages include: ‘Contact’ or ‘Support’ pages, Forums, etc.
- Include it in your email signatures.
- Make it a part of your datasheet or brochures.
- If your product is a software or website, include it within your product itself.
- Other creative ways to promote it...

When users visit this “Web Address (URL)” and submit the SmartForm, a requirement will be automatically created in your Accompa system - using:

1. The data the user entered on the SmartForm, and
2. The data you’ve pre-set under the “Hidden Fields” section of the SmartForm, as explained in section 1 above.

You can create a SmartView as explained in Tip-1.1 in page 4 to display all requirements created via such SmartForm submissions. Your product managers (or other personnel) can then review this SmartView periodically and process the requirements appropriately.

Tip-3.1:

You can create unlimited number of SmartForms in your Accompa system. Think of creative ways to mix and match “Hidden Fields” and “Visible Fields” to set up different SmartForms for customers, internal stakeholders, etc.

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We hope that you found this Quick-Start Guide useful in learning how to perform these 3 key actions in Accompa:

1. Add a new SmartForm
2. Edit a SmartForm
3. Launch & use a SmartForm to gather feature requests

We've designed Accompa to be intuitive and hope that you will find it easy to learn and use.

If you have any questions or comments, please let us know at support@accompa.com.

We thank you for being our customer!

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About Accompa

More than 100 companies of all sizes (from Fortune-500s to startups) use Accompa to gather, track, and manage requirements while saving time & increasing productivity. Accompa is 100% cloud-based and is easy to deploy and use. Now you can achieve powerful real-time collaboration across your internal teams, as well as with your customers. Get started — see links below...

Our mission: *To help you build more successful products more efficiently by enabling you to continuously improve every part of your requirements management process.*

Document authored by:



Email: sales@accompa.com

Website: www.accompa.com

Call: +1-408-689-8231

Get Started Now:

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Headquarters:

5201 Great America Pkwy, Ste 320

Santa Clara, CA 95054

United States

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