

# Building Interactive PDFs

The following guide provides a comprehensive overview of using the PDF builder to create interactive PDFs within the platform. This process involves creating a new form and utilizing various placeholders and fields to customize the PDF. The example demonstrated here uses an I-9 form, illustrating how you can edit, remove, or swap PDFs, add items, and make the form interactive by utilizing various features offered by the platform.

## Step 1

Begin by navigating to the platform's PDF builder. To create a new form, select the option to add a PDF. Here, you have the option to edit, remove, or replace this PDF. Alternatively, you can add items to open the edit menu.

The screenshot displays the PDF builder interface. On the left, the 'Resources' panel lists various elements like 'Uploads', 'Media (Video, Image, etc.)', 'Texts', 'Acknowledgments & Alerts', 'External Links', and 'Notifications'. The 'Drag & Drop Items' panel on the right shows a list of 'Common' items including 'First Name', 'Last Name', 'Signature', 'Date', 'Alphanumeric', 'Checkbox', 'State', 'Zip Code', 'City', and 'Street'. The main area shows the 'Employment Eligibility Verification' form, which is a U.S. Citizenship and Immigration Services (USCIS) Form I-9. The form includes sections for 'Employee Information and Attestation', 'Employer Information and Attestation', and 'Signature of Employer or Authorized Representative'. The form is currently in a draft state, with a 'Save' button at the bottom right.

## Step 2

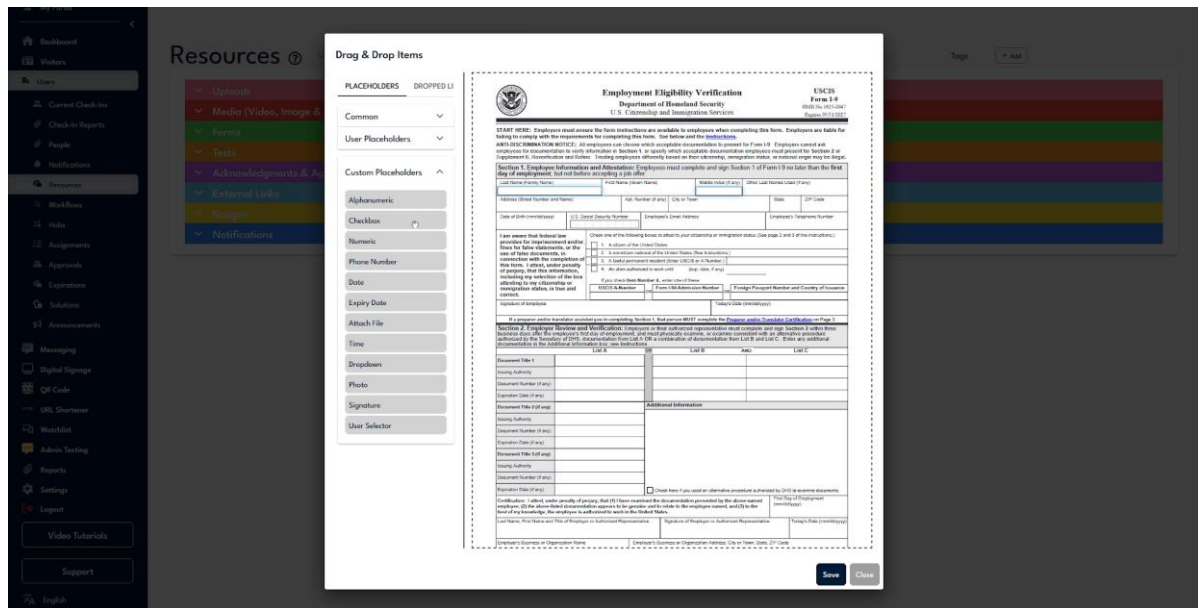
[illegible]

For instance, if the form asks for the last name, navigate to user placeholders and select 'Last Name'. This ensures that the user's last name will be auto-filled if available in the system.

[illegible]

# Step 4

When a question requests a middle initial, and no specific placeholder exists, use custom placeholders to insert an alphanumeric field, allowing users to input any text. Various other options are also available within custom placeholders.



# Step 5

You can create a checkbox for simple yes/no inputs, set a numeric field to accept only numerical entries with an interactable scroll, and configure phone numbers to toggle between different country codes.



Incorporate a dropdown menu to present multiple options from which the user can select. You can also add a signature collector to gather signatures.

The screenshot displays a form builder interface. On the left is a 'Resources' sidebar with categories like 'Users', 'Current Check-ins', 'Check-in Reports', 'People', 'Notifications', 'Resources', 'Workflows', 'Hub', 'Assignments', 'Approvals', 'Expectations', 'Solutions', and 'Assessments'. The main area shows a 'Drag & Drop Items' panel with various form elements: 'Signature', 'Date', 'Alphanumeric', 'Checkbox', 'State', 'Zip Code', 'City', 'Street', 'User Placeholders', and 'Custom Placeholders'. The preview form on the right is an 'Employment Eligibility Verification' form (E-9) from the U.S. Citizenship and Immigration Services. It includes fields for personal information, employment details, and a signature line. A dropdown menu is visible in the preview form, and a 'Save' button is at the bottom right.

## Step 8

Include an attach file button, enabling users to upload files. This feature is useful for forms like the I-9 that may require submission of acceptable documents.

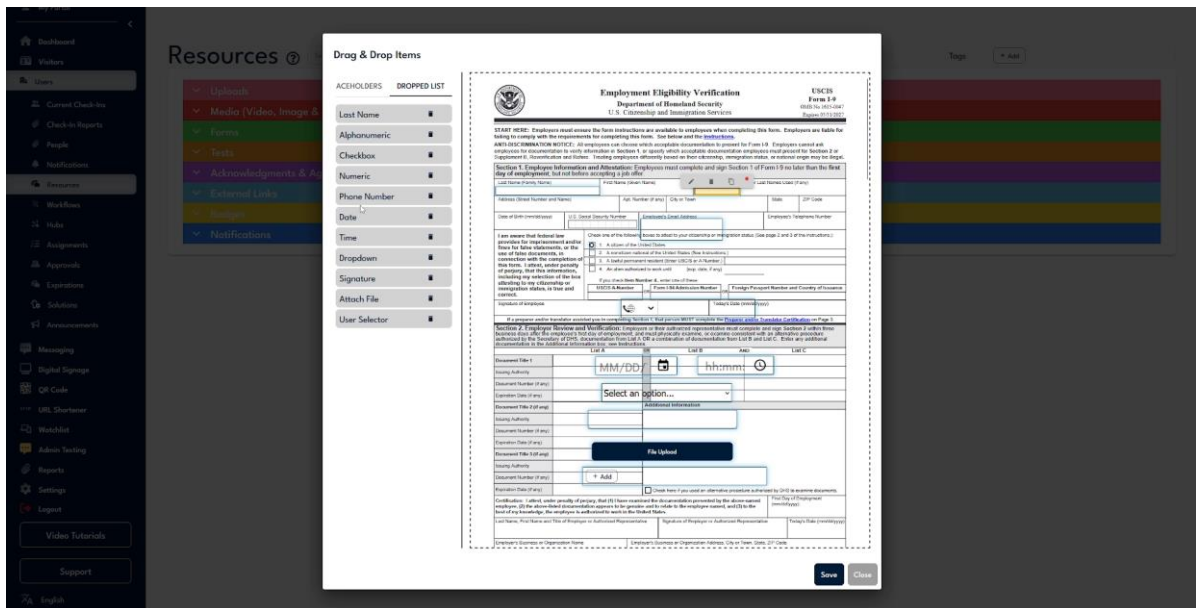
This screenshot shows the same form builder interface as the previous one, but with an additional feature. The 'Drag & Drop Items' panel remains the same. In the preview form, an 'Attach File' button has been added to the document number field. The button is labeled 'Attach File' and has a file icon. The preview form also shows a 'Save' button at the bottom right.

Utilize a user selector for scenarios such as training sessions, allowing users to indicate attendance by selecting names from an organizational list.



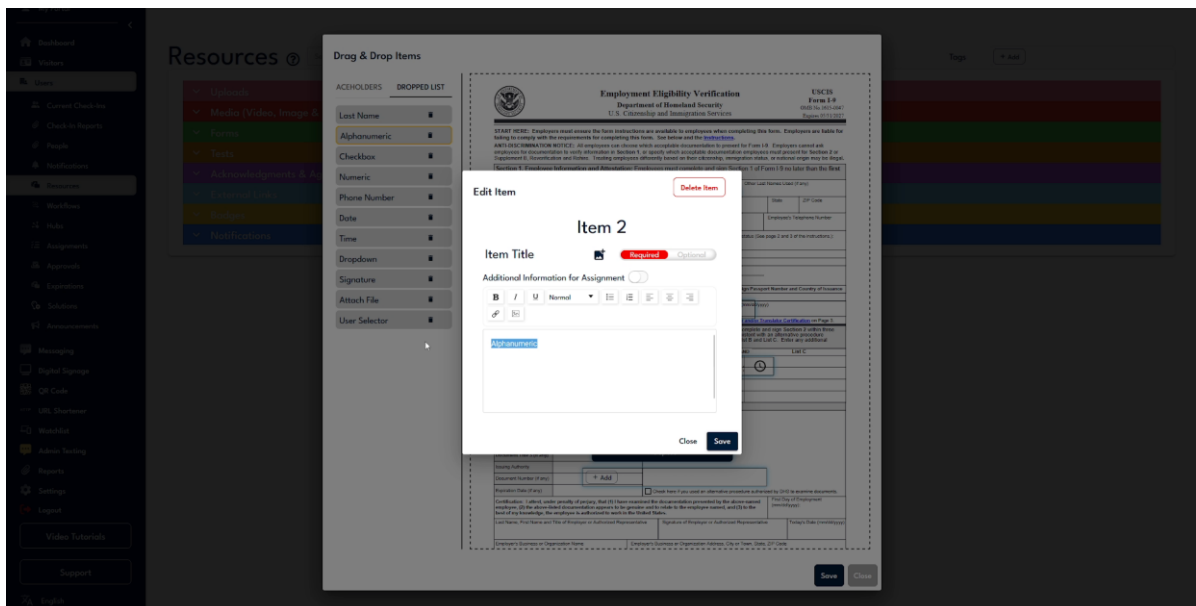
Each field in the form is interactable. For instance, clicking on the middle initial field brings up a separate tab and toolbar for additional options.





## Step 11

This separate tab offers a quick navigation menu. In the edit option, you can designate fields as required or optional and change their names as needed.



## Step 12

Naming fields appropriately is crucial for report generation, as it links the question to the user's input in the generated report.

The screenshot displays a software interface with a dark sidebar on the left containing navigation links like 'Dashboard', 'Visitors', 'Users', 'Current Check-ins', 'Check-in Reports', 'People', 'Notifications', 'Resources', 'Workflows', 'Hub', 'Assignments', 'Approvals', 'Expirations', 'Solutions', 'Announcements', 'Messaging', 'Digital Signage', 'QR Code', 'URL Shortener', 'Watchlist', 'Admin Testing', 'Reports', 'Settings', 'Logout', 'Video Tutorials', and 'Support'. The main area is titled 'Resources' and features a 'Drag & Drop Items' panel. This panel has two columns: 'ACEHOLDERS' and 'DROPPED LIST'. The 'DROPPED LIST' contains several items: 'Last Name', 'Middle Initial', 'Checkbox', 'Numeric', 'Phone Number', 'Date', 'Time', 'Dropdown', 'Signature', 'Attach File', and 'User Selector'. The 'Middle Initial' item is highlighted with a yellow background. To the right of the sidebar is a large form titled 'Form Eligibility Verification' from the 'U.S. Citizenship and Immigration Services'. The form includes various input fields, checkboxes, and a 'File Upload' button. The form is partially filled out with sample data.

## Step 13

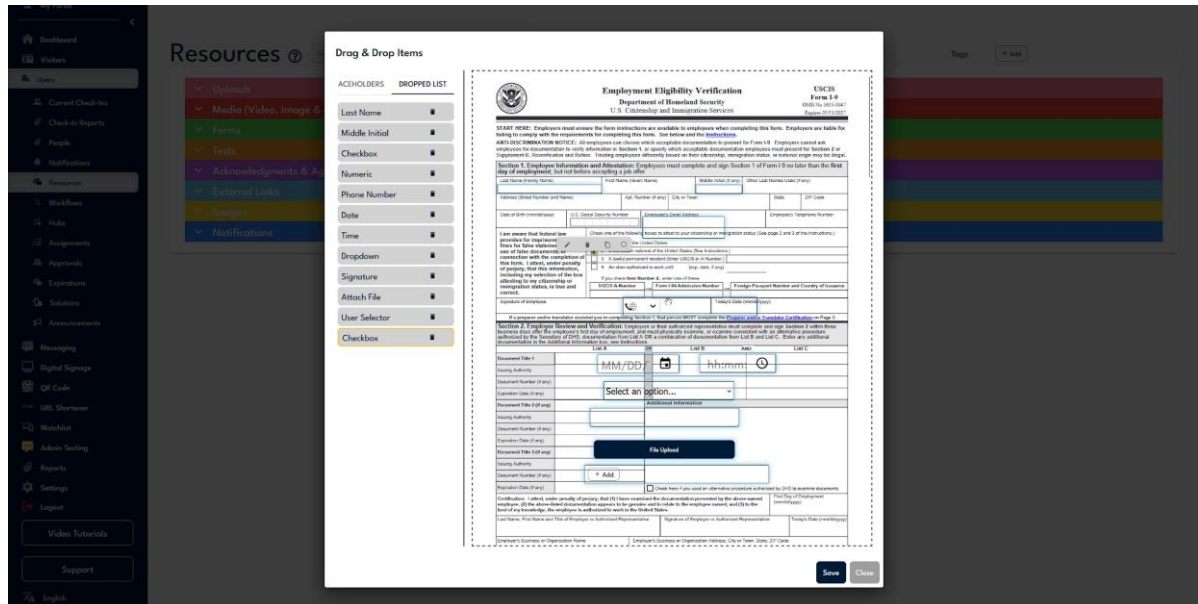
The current naming setup will display 'Middle Initial' followed by the user's input. If left unchanged, it would default to 'Alphanumeric'. Accurate naming is also essential for establishing custom triggers based on form responses.

This screenshot is identical to the one above, showing the same software interface and 'Form Eligibility Verification' form. However, in the 'Drag & Drop Items' panel, the 'Middle Initial' item in the 'DROPPED LIST' has been renamed to 'MM/DD/YYYY'. This change is reflected in the form's input fields, where the 'Middle Initial' field now displays 'MM/DD/YYYY' instead of the previous value.



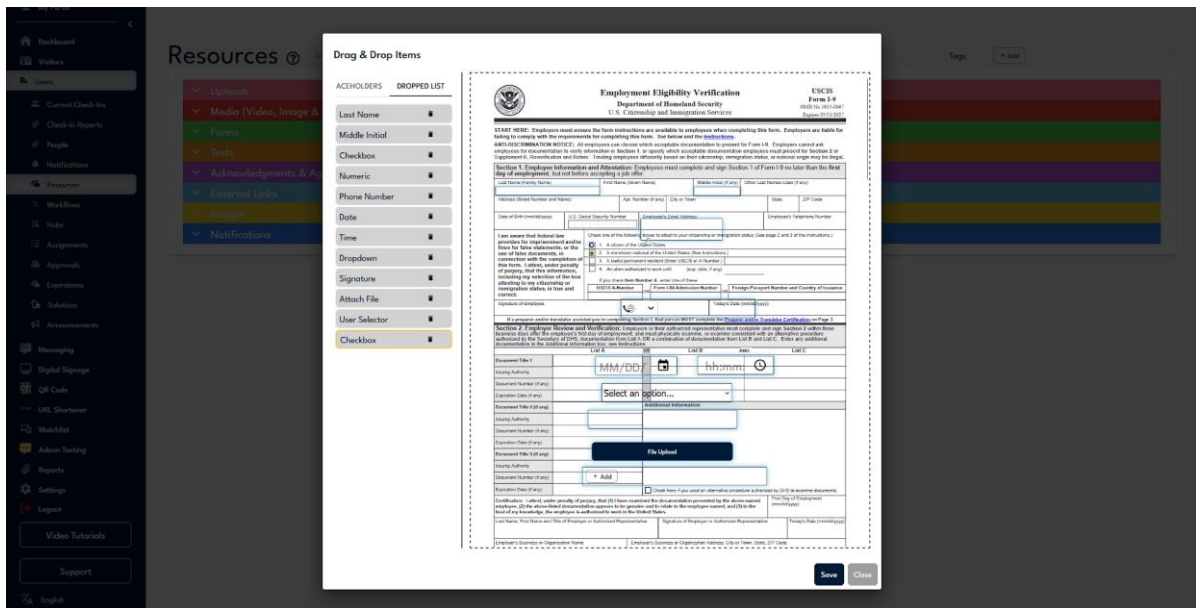
# Step 14

Utilize the toolbar to quickly delete or duplicate fields. For example, duplicate checkboxes to avoid recreating them and manage their settings efficiently.



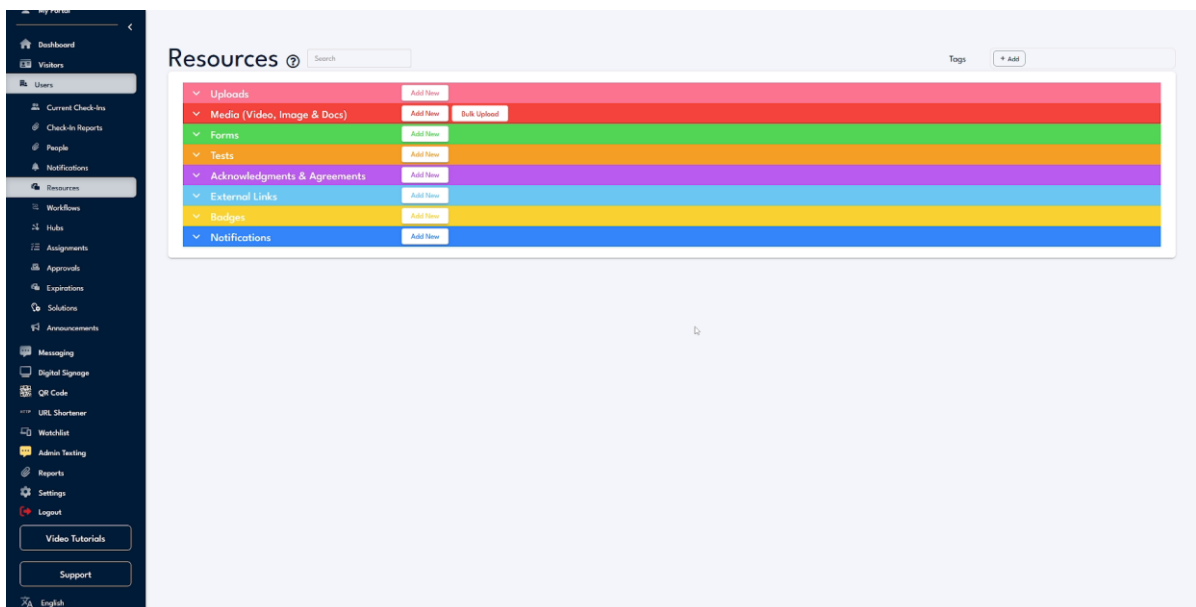
# Step 15

The arrow keys on your keyboard allow precise field placement. Mark fields as required or optional; for instance, ensure checkboxes are optional if only one selection is needed.



## Step 16

Make fields optional to allow selection flexibility, essential for questions requiring a single response. This concludes the basics of using the PDF builder, which is a versatile tool offering numerous possibilities.



## Step 17

If assistance is needed, contact support through the support button located at the bottom left of your screen.

