

# Tap Forms Mac

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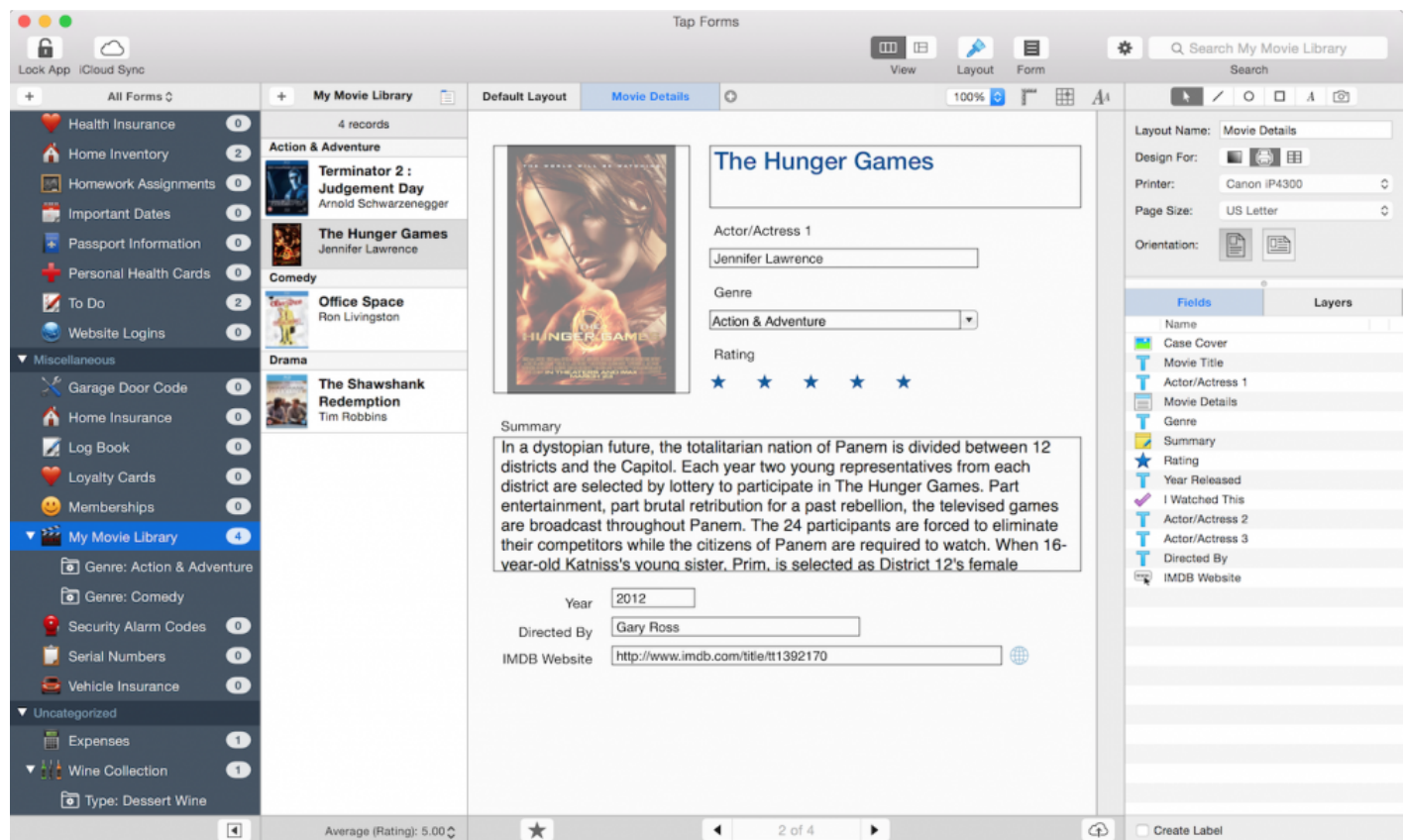
Tap Zapp Software Inc.

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# Introduction

Tap Forms is a very powerful organizational tool designed to help you keep track of all your life's most important information at home, at work, or on the go. With built-in support for iCloud, now you can keep all your Tap Forms data on your iPhone and iPad in sync with your Mac. So when you're out and about and you need to lookup some important piece of information, you can be confident to know that you'll have it right there with you.



# Forms, Fields and Records

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A Tap Forms database contains Forms, Fields, and Records.

A **Form** is simply a template which contains a collection of fields that describe the data you wish to capture and print.

A **Field** defines the type and title of the data that you want to store. For example, "First Name" is the title for a field and it would probably have "Text" as the field's type. Another field might be "Quantity" and it would probably have the field type of "Number". There are over 20 different field types to choose from.

A **Record** is an instance of a Form which contains the actual data values that you are recording. Each value would be displayed in the fields you've added to your form. The title of the field would be displayed next to the field value.

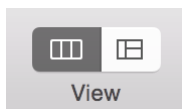
Tap Forms contains 33 built-in forms ready for you to use and customize. You can even delete them if you don't wish to keep them in your database. You can also create new forms from scratch which you customize to capture exactly the kinds of data you want to keep track of.

## Records Display

There are two different views for displaying your records.

1. Single Column List View
2. Multi-Column List View

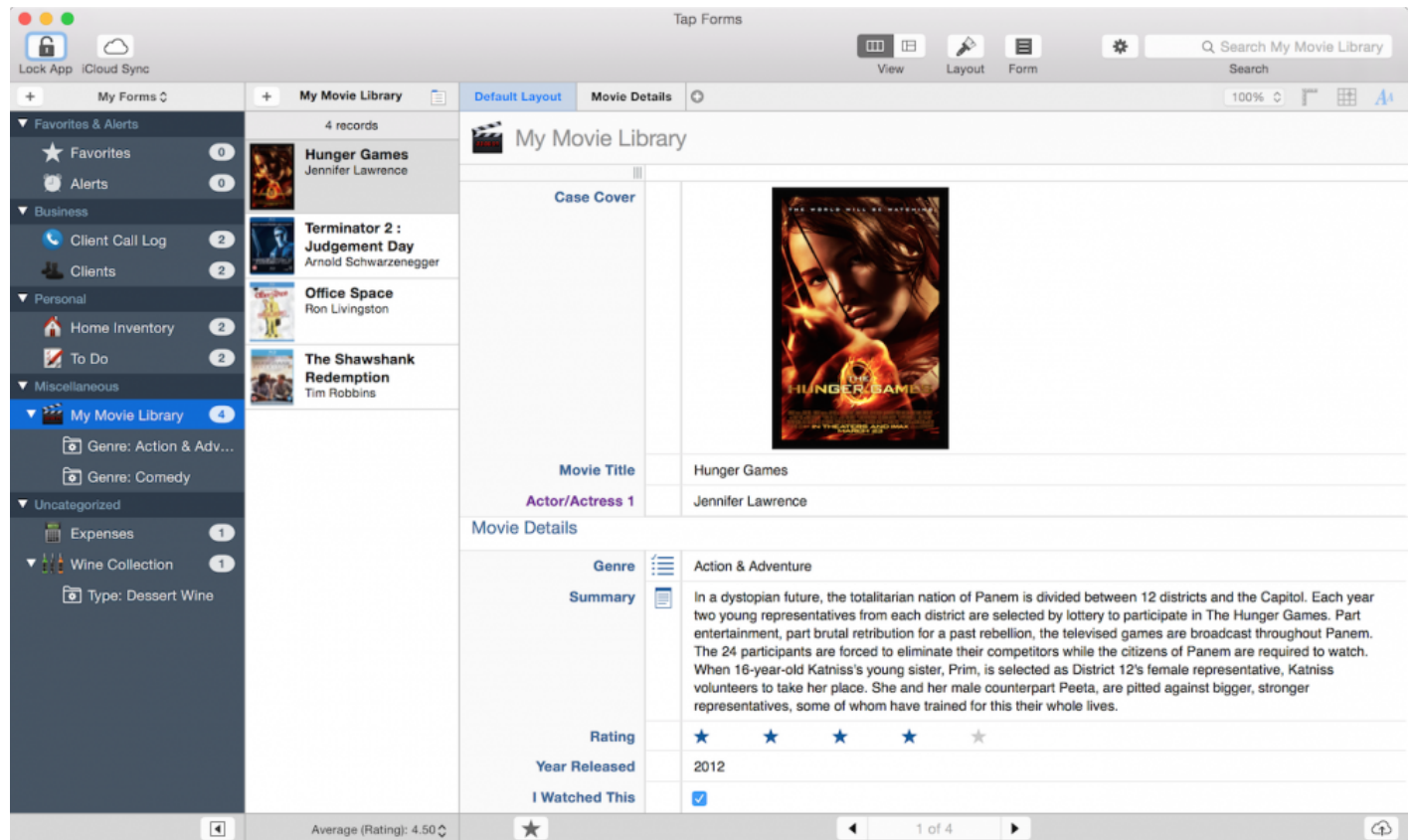
To switch between each view, select the appropriate option under the View menu or click on one of the View buttons in the toolbar.



## Single Column List View

In single column list view, records are displayed in one column on the screen with each field in the form one on top of the other. If you have a Photo field as the first field in your form template, Tap Forms will display a thumbnail of the photo just to the left of the next set of fields.





## Multi-Column List View

In multi-column list view, Tap Forms displays your records in a table view with each column being a different field in your form. You can scroll horizontally through the columns to view the contents of each field if they do not all fit within the viewable area.


The screenshot shows the Tap Forms Mac application interface. The top menu bar includes 'Lock App', 'iCloud Sync', and a search bar labeled 'Search My Movie Library'. Below the menu bar, there are tabs for 'View', 'Layout', 'Form', and 'Settings'. The main window is divided into two sections: 'My Forms' on the left and 'My Movie Library' on the right.

The 'My Forms' section contains a sidebar with various categories: Favorites & Alerts (Favorites: 0, Alerts: 0), Business (Client Call Log: 2, Clients: 2), Personal (Home Inventory: 2, To Do: 2), and Miscellaneous (My Movie Library: 4, Genre: Action & Adv..., Genre: Comedy, Uncategorized (Expenses: 1, Wine Collection: 1, Type: Dessert Wine)).














The 'My Movie Library' section displays a table with the following columns: Movie Title, Actor/Actress 1, Genre, Summary, Rating, Year Released, I Watched This, Actor/Actress 2, Actor/Actress 3, and Directed By. The table contains four records:

Movie Title	Actor/Actress 1	Genre	Summary	Rating	Year Released	I Watched This	Actor/Actress 2	Actor/Actress 3	Directed By
Hunger Games	Jennifer Lawr...	Action & Ad...	In a dystopian...	★★★★	2012	<input checked="" type="checkbox"/>	Josh Hutchers...	Woody Harrel...	Gary Ross
Terminator 2 :...	Arnold Schwa...	Action & Ad...	Almost 10 yea...	★★★★	1991	<input checked="" type="checkbox"/>	Linda Hamilton	Edward Furlon...	James Cameror
Office Space	Ron Livingston	Comedy	Peter Gibbons...	★★★★★	1999	<input checked="" type="checkbox"/>	Jennifer Aniston	Gary Cole	Mike Judge
The Shawsha...	Tim Robbins	Drama	After the murd...	★★★★★	1994	<input checked="" type="checkbox"/>	Morgan Freem...	Clancy Brown	Frank Darabont

Below the table, there is a section for 'My Movie Library' details, showing a 'Case Cover' image of the Hunger Games movie poster. The details section includes fields for 'Movie Title' (Hunger Games), 'Actor/Actress 1' (Jennifer Lawrence), 'Genre' (Action & Adventure), and 'Summary' (In a dystopian future, the totalitarian nation of Panem is divided between 12 districts and the Capitol. Each year two young representatives from...).

There is also a small tools button (  ) just to the right of the table header in multi-column list view which lets you decide which fields to display in the table. If a field is checked, it will display. If it's unchecked, it will be hidden.

**Select Fields**

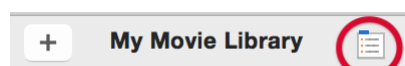
	Case Cover	✓
	Movie Title	✓
	Actor/Actress 1	✓
	Movie Details	
	Genre	✓
	Summary	✓
	Rating	✓
	Year Released	✓
	I Watched This	✓
	Actor/Actress 2	✓
	Actor/Actress 3	✓
	Directed By	✓
	IMDB Website	✓

## Section Headers and Index

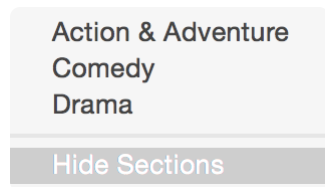
Section headers within your records are used to separate one set of records from another. For example, if you have a list of customers sorted alphabetically by last name, then Tap Forms will automatically generate section headers with the first character of the last name. So all “Adams” will be in the “A” section and all “Smiths” will be in the “S” section.

The section header title is determined by the first character of the First Sort Field. However, if you have a Date field as your First Sort Field, Tap Forms will automatically group the records into Year and Month sections. Another way to control the sectioning of records is to set the **Group Records By** sorting option. Tap Forms will then display the full values for the selected field for the section titles. For example, in the My Movie Library form, the records are grouped by Genre, so the records will be grouped together by Action & Adventure, Comedy, Drama, etc.

On the iOS version of Tap Forms, you can easily jump to different sections in your records list by sliding your finger up and down on the section index on the right of the records list view. On Mac OS X there's no such built-in control, so Tap Forms provides a popup button just to the right of the form name above the records list view that will let you select which section you would like to jump to.



When you click the above button you'll see the popup list of sections.

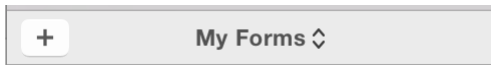


You can hide the section headers if you don't want them to appear in the list of records. This may be useful if you have only a few records and you don't want Tap Forms to take up the extra space to accommodate the section headers.

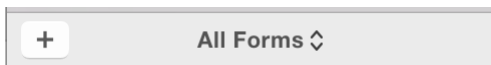
## Using the Built-in Forms

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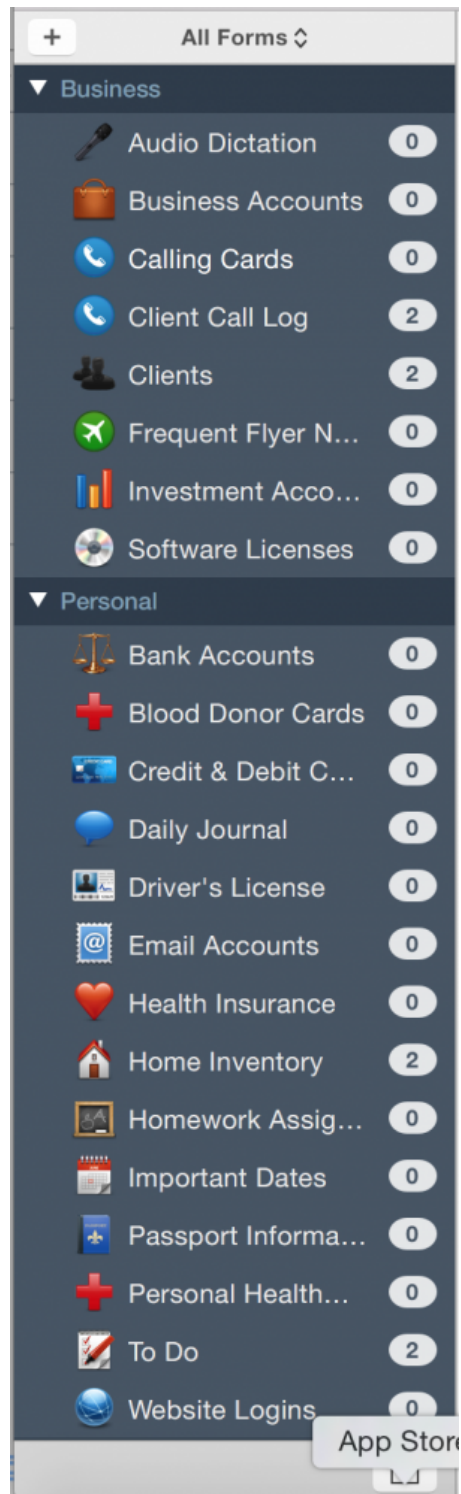
**1. Click on the My Forms popup button and switch from the My Forms item:**



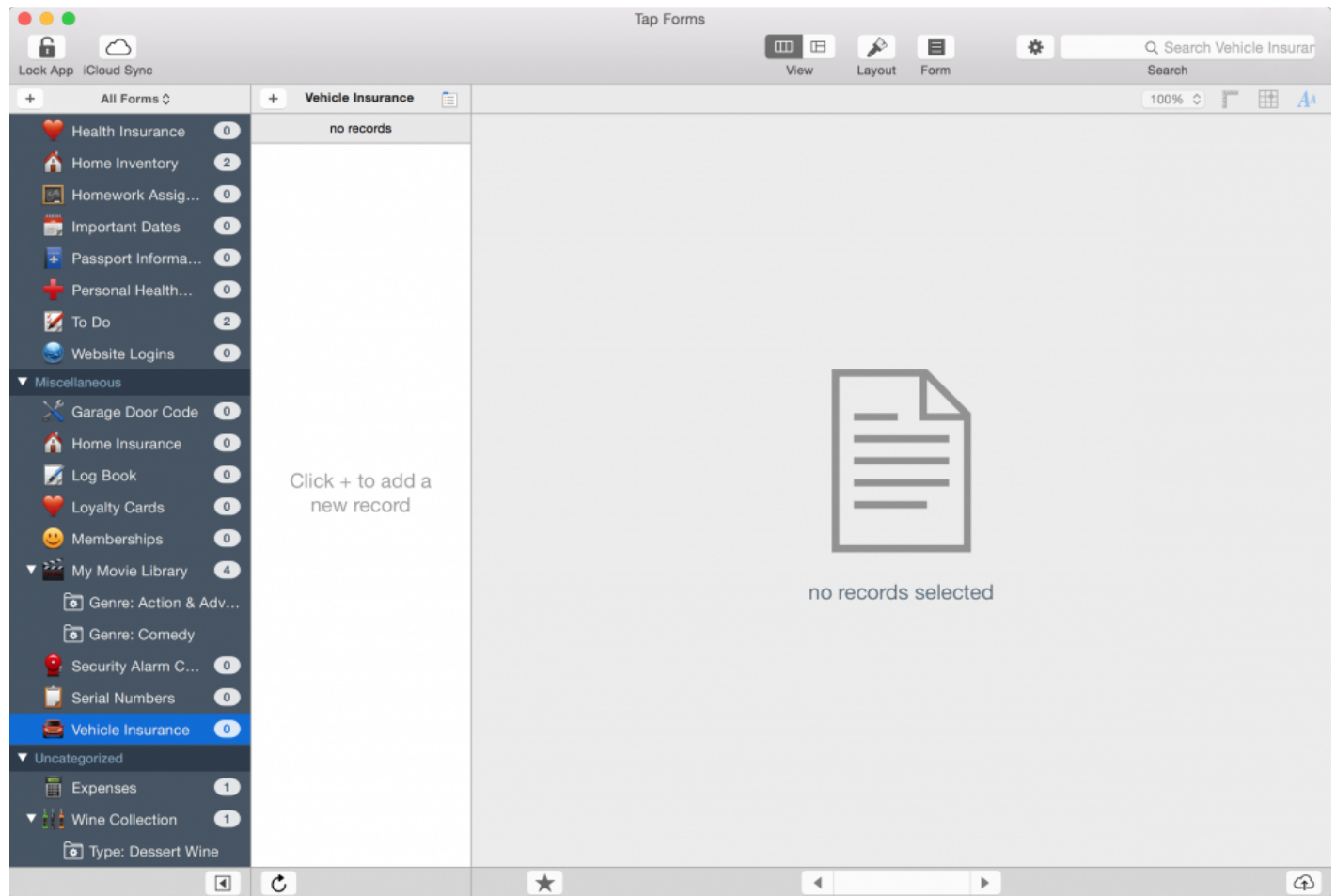
to the All Forms item:



You should now see a list of all the built-in forms that are available to you. You may need to expand the categories to display the list of forms beneath each category heading. Note that if this is the first time you're using Tap Forms, most of your forms will have 0 records in them.



**2. Click on a form to select it.**



There are currently no records in the selected form.

**3. Click the + button next to the form name in the second column to add a new record to your selected form.**

The screenshot displays the Tap Forms Mac application interface. The top menu bar includes 'Lock App', 'iCloud Sync', and 'Tap Forms'. Below the menu bar, there are icons for 'View', 'Layout', 'Form', and a search bar labeled 'Search Vehicle Insuran'. The left sidebar shows a list of forms: 'All Forms' (0), 'Vehicle Insurance' (1), 'Health Insurance' (0), 'Home Inventory' (2), 'Homework Assig...' (0), 'Important Dates' (0), 'Passport Informa...' (0), 'Personal Health...' (0), 'To Do' (2), 'Website Logins' (0), 'Miscellaneous' (0), 'Garage Door Code' (0), 'Home Insurance' (0), 'Log Book' (0), 'Loyalty Cards' (0), 'Memberships' (0), 'My Movie Library' (4), 'Genre: Action & Adv...' (0), 'Genre: Comedy' (0), 'Security Alarm C...' (0), 'Serial Numbers' (0), 'Vehicle Insurance' (1), 'Uncategorized' (0), 'Expenses' (1), and 'Wine Collection' (1). The main area shows the 'Vehicle Insurance' form with fields for 'Make and Model', 'Year', 'VIN', 'Photo', 'Insurance Company', 'Insurance Agent', 'Policy Number', 'Coverage Start Date', and 'Coverage End Date'. The 'Photo' field has a dashed box with icons for adding, taking, viewing, and deleting a photo. The bottom status bar shows '1 of 1' and a refresh icon.

Tap Forms

Lock App iCloud Sync

View Layout Form

Search Vehicle Insuran

Search

100%

All Forms 0

Vehicle Insurance 1 record

Default Layout

Vehicle Insurance

Make and Model

Year

VIN

Photo

Insurance Company

Insurance Agent

Policy Number

Coverage Start Date

Coverage End Date

Genre: Action & Adv...

Genre: Comedy

Security Alarm C...

Serial Numbers

Vehicle Insurance

Uncategorized

Expenses

Wine Collection

Type: Dessert Wine

1 of 1

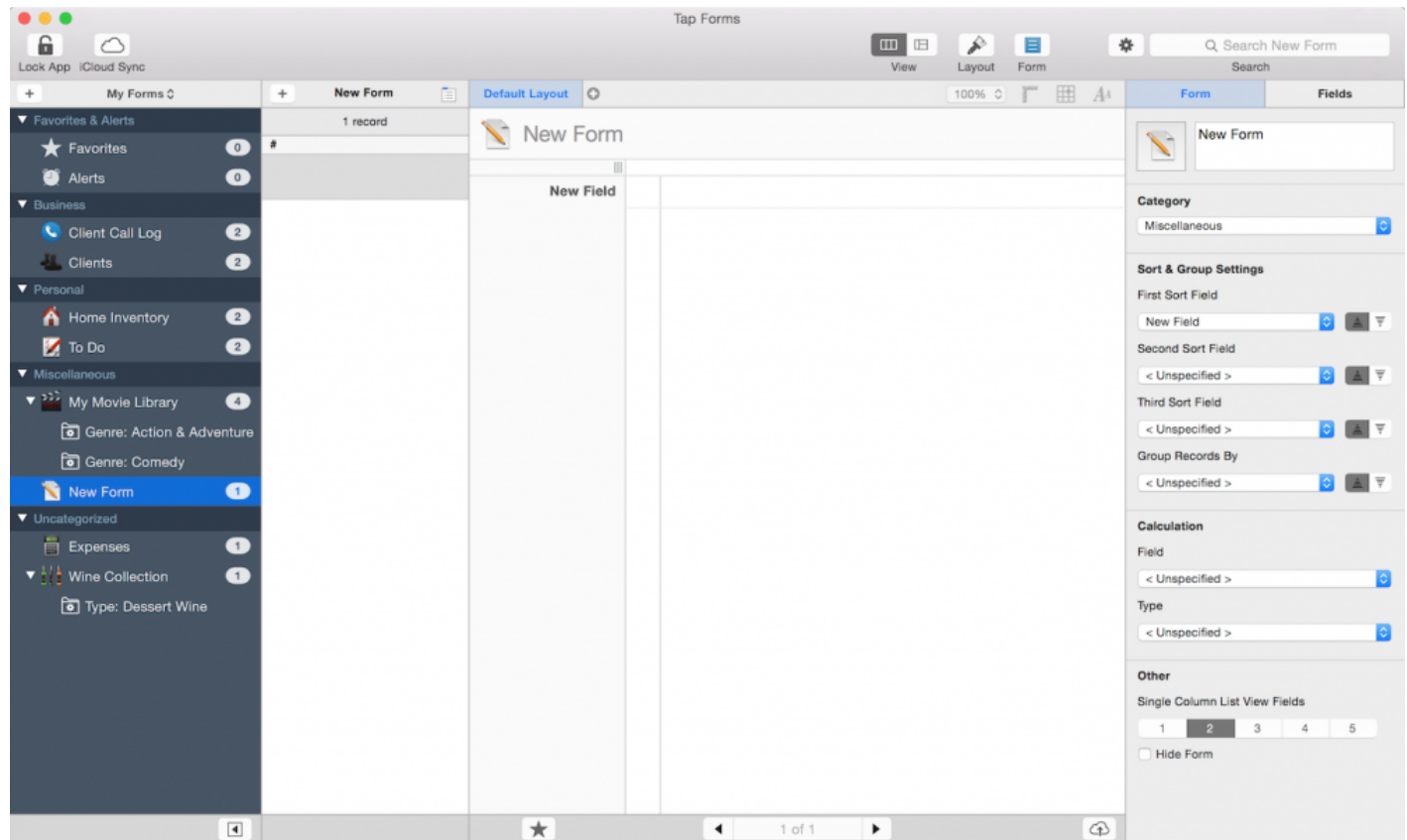
Fill in all the fields in your new record.



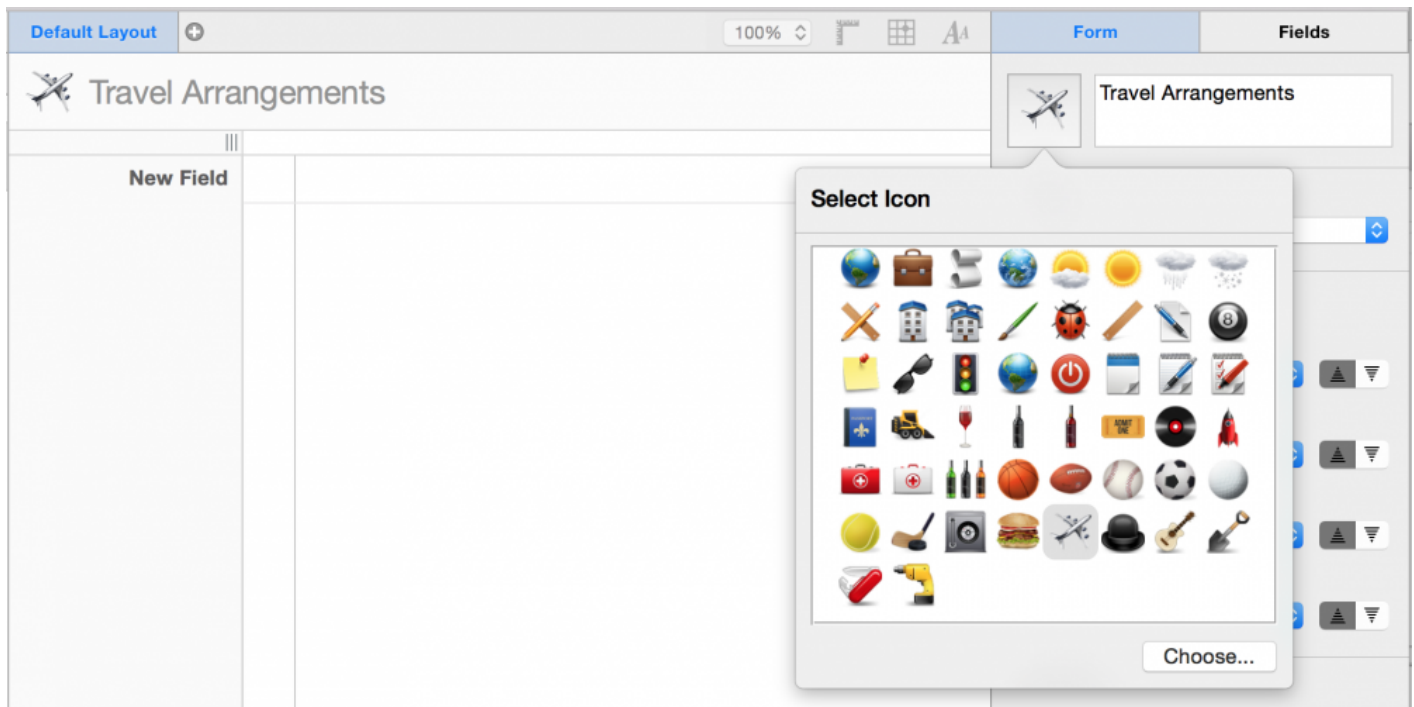
# Creating a New Form

## 1. Click the + button at the top-left of the window.


A new form will be created with a default field and the Form Inspector panel will display on the right of the window.



## 2. Select an icon for your form and give your form an appropriate name that represents the content you will be storing.



You can set a variety of form level properties such as the Category your form will be located in, what the First Sort Field, Second Sort Field, Third Sort Field, and Group Records By fields will be. You can choose the sort direction too by clicking on the up or down arrows next to the sort field popup buttons.

Form	Fields
<div><div>Travel Arrangements</div></div>	
<b>Category</b> <div>Miscellaneous</div>	
<b>Sort &amp; Group Settings</b>	
First Sort Field <div>Destination</div>	
Second Sort Field <div>&lt; Unspecified &gt;</div>	
Third Sort Field <div>&lt; Unspecified &gt;</div>	
Group Records By <div>&lt; Unspecified &gt;</div>	
<b>Calculation</b>	
Field	

## Calculation

If you have any Number, Rating, Checkmark, or Calculation fields in your form, you can use the Calculation Field and Calculation Type to tell Tap Forms to compute the total, minimum, maximum, or average of the field that you selected. The results will be displayed at the bottom of the single-column records list view.

## Other

**Single Column List View Fields** is used to tell Tap Forms how many fields to display on the single-column records list view. You can tell Tap Forms to display the first 1, 2, 3, 4, or 5 fields on the single-column records list view. If the first field is a Photo field type, then up to 6 fields can be displayed because the Photo field counts as one field but then you still have 5 additional fields you can display next to the Photo field thumbnail.

**Hide Form** tells Tap Forms not to display the form on the “My Forms” list even if there are records within the form. Normally the “My Forms” list will display forms that have 1 or more records within them. The form will still be visible in the “All Forms” list. The “All Forms” list displays all forms no matter how many records are in them.

### 3. Click the Fields tab and add some fields by clicking the + button below the fields list.

As you add new fields, Tap Forms will display the properties inspector for each field type you add down below. Here you can set different field properties such as the field name, field type, number formatter, decimal places, default value, etc. Each field type has its own unique set of properties you can change.

You can also rearrange the order of fields by dragging them up and down in the fields list. By rearranging the order of fields, Tap Forms will display them in whatever order you’ve set on the Default Layout and on the Multi-column List View. You can also delete fields by clicking the delete button next to the add field button. There is also a duplicate field button which will duplicate the selected field.

The screenshot displays the Tap Forms Mac application interface. The main window shows a form titled "Travel Arrangements" with a sidebar on the left containing field labels: Destination, Departure Date, Return Date, Purpose, Notes, and Travel Documents. The form body contains a table with columns Name, Kind, and Size, and a set of controls (+, -) below it. The right sidebar, titled "Form" and "Fields", lists the fields: Destination, Departure Date, Return Date, Purpose, Notes, and Travel Documents. Below this list are controls for adding, removing, and rearranging fields. The "Field Name" section shows "Destination" in a text box. The "Type" section shows "Text" selected from a dropdown menu. The "Label Color" section shows a color picker.

Name	Kind	Size



















If you drag a Photo field to the first position in your form, Tap Forms will display the thumbnail of the photo to the left of the next set of fields on the single-column list view. You can control the size of the thumbnail on the Photo properties view.








## Field Types

Tap Forms has 23 different field types. Each field type has its own set of properties that can be set in order to customize the way Tap Forms displays and edits your data.

**The following table describes all the field types available in Tap Forms.**

Icon	Field Type	Description
	Text	Text fields store small amounts of text. Normally a single line's worth. For example, a Movie Title.
	Number	Number fields display numeric data. They can be configured to format the display as currency, decimals, percentages, scientific notation, spell out (e.g. "twenty four ninety nine"), or as a duration (e.g. "10 hrs, 3 mins" or "10:03").
	Date	Date fields will display the month, day, and year. The display format used depends on your Region Format settings in the System Preferences. In general, Tap Forms uses the Medium date format to display dates.
	Time	Time fields will display the hours and minutes and AM or PM. This also depends on your region settings. If you have 24 hour mode enabled then you won't see AM or PM. Tap Forms uses the Short time format to display times.
	Date & Time	Date & Time fields are a combination of the Date and the Time fields displayed in a single field. The Date part will use the Medium date format. The Time part will use the Short format. By adding a Date & Time field to your form, you can also enable the Alerts function in Tap Forms. With the Alert function you can tell Tap Forms to notify you at the specified date and time. You can also include a short note which will be displayed along with the notification. Alerts can be scheduled to repeat at a variety of frequencies. These options are available when you're editing a date value in your record.
	Date Created	Tap Forms keeps track of the date a record was created. The Date Created field type will expose this field to your forms. You can sort by this field or filter your records by this field.
	Date Modified	Tap Forms also keeps track of the date and time a record was modified. You can sort by this field or filter your records by this field. Please note however that if you change the sorting of your form after your form is created, Tap Forms will update the Date Modified value for each record to be the current date and time. So it's best to set it once and leave it.
	Audio Recording	Tap Forms for Mac can play back audio recordings made on Tap Forms for iOS, but it cannot record audio notes on its own. When you sync with iCloud, Tap Forms for Mac will gain access to the audio notes you created on iOS.

	Calculation	The Calculation field type lets you construct formulas to compute mathematical expressions. Formulas can contain references to other fields within your form. You can use all the basic mathematical operators such as ( ) * / – + as well as the keyword \$now. The \$now keyword will insert the current time into the formula before being evaluated.
	Checkmark	The Checkmark field lets you have a basic on/off switch for setting whether something is true or false, on or off, yes or no, etc. Checkmark fields can be used in formulas also. For example, if you wanted the total to be computed only when a checkmark field is on, just drag the checkmark field into your formula and use multiplication to cause the result to be either 0 if it's off or whatever the regular result would be if the checkmark field value is on.
	Contact	The Contact field lets you reference a contact from your Mac's Contacts database. Tap Forms will copy the first and last names into its database as well as the Contact's unique identifier. This information will be used to look up the contact's record from the Contacts database whenever you click on the contact button to the right of the field. <b>Note:</b> due to the way Apple syncs contacts across devices, the unique identifier could get changed between devices. This can cause Tap Forms to display the wrong contact when you click on the contact button to the right of the field.
	Drawing	The Drawing field type on Mac is a read-only field. You can create drawings on iOS and view them on the Mac version. You cannot draw into a field on the Mac version.
	Email	The Email field will give you a button to the right of the field which will launch Mail whenever clicked and pass the email address entered into the field into the To: field of a new email message. Separate email addresses with commas to address more than one email address at a time.
	File Attachment	The File Attachment field will let you store one or more files associated with your record. You can tell Tap Forms if your File Attachment field supports just one file or multiple files by checking the <b>Multi-File Enabled</b> checkbox on the Field Properties screen. When Multi-File Enabled is checked, you will see a list of files within your File Attachment field. You can double-click on a file to launch the app which is responsible for that field type. You can also choose to attach your file as a copy of the file or as an alias of the file. When you attach a copy, Tap Forms will copy the file selected into its Attachments folder. The Attachments folder is synchronized using iCloud to your other devices. So you will be able to access the same files on your iOS devices and other Macs that are all using the same iCloud account. Aliases cannot be viewed on other devices.
	Link to Form	This field lets you connect different forms together in a parent to child relationship. Use <b>One to Many</b> if you don't want or need to share the records from the linked form with other forms or records. Use <b>Many to Many</b> if you'd like to be able to select from a list of previously entered records from another form and link them to the parent record. Enable the <b>Show Inverse Relationship</b> option if you want to display the parent record on the child form you're linking to.
	Link from Form	The Link from Form field will display the parent record that links to the child record. This field should never be created on its own. It is automatically created for you from the Link to Form field when you enable the <b>Show Inverse Relationship</b> option.

	Location	The Location field type will display to you a map of your current location. You can search for different locations and drag the pin around to change your location. You can also edit the location name, but Tap Forms will first do an address lookup to fill in the address that matches your current location.
	Note	The Note field type allows you to enter in large amounts of text. Text can also be styled using different fonts, sizes, and colours. The Mac version has the ability to add bulleted lists, but these are not displayed on the iOS version of Tap Forms.
	Phone	The Phone field will convert a set of digits into a formatted phone number taking into consideration different region formats for phone numbers. The iPhone version will also dial or text the number when the phone button is tapped.
	Photo	The Photo field will let you select a photo from your hard drive or use the built-in camera to take a photo. You can also drag and drop an image into the Photo field from your hard drive. Once a photo has been attached to your Photo field, you can click on the QuickLook button to view a larger version of the photo or click the trash can button to delete it.
	Rating	The Rating field will display up to 10 stars that you can click on in order to rate your records. For example, if you were maintaining a movie library you could add the film's popularity rating to your record. Ratings can be used in calculations and also at the form level. So you could display the average rating for all the movies in your library.
	Section Heading	The Section Heading field will help you to organize the fields within your form into sections. This makes working with long forms much easier.
	Website	The Website field lets you store an address to a website or even another application on your own computer. When you click on the website button to the right of the field, Tap Forms will launch your web browser and take you to the address specified.



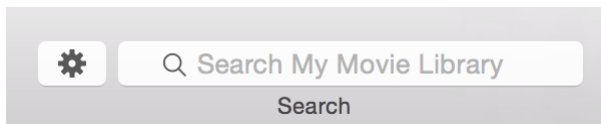
## Searching

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Tap Forms can perform two kinds of searches.

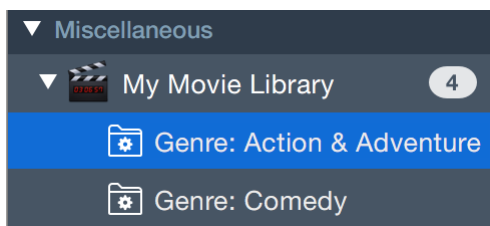
1. Search across all text and number fields in a form by using a simple search term.
2. Create one or more Saved Searches which target specific fields for filtering your records.

For basic searches, just enter a search term into the Search field:



After you type in a search term, a bar will appear below the Search field with a Save button.

Click the **Save** button to save the search. Tap Forms will display the search beneath the form on the left side of the window.



For more advanced searches, click the gear button to the left of the Search field. Tap Forms will display the advanced search popover where you can add Search Rules which target your search to specific fields.

**Edit Search:** Genre: Action & Adventure

Search Term:

This search term will be ignored if any search rules are specified below

**Search Rules:**

Genre	contains	Action & Adventure	-	+
Rating	is greater than	3	-	+

Save Search

Click the **+** button to the right of a Search Rule to add a new Search Rule.



When you add multiple Search Rules, Tap Forms will combine each rule together to reduce the number of records returned from the search. So the more Search Rules you add, the fewer records will be returned.

Click the **Save** button to save your search. Click the Search button if you don't want to save your search but you still want to filter your records.

## Deleting a Saved Search

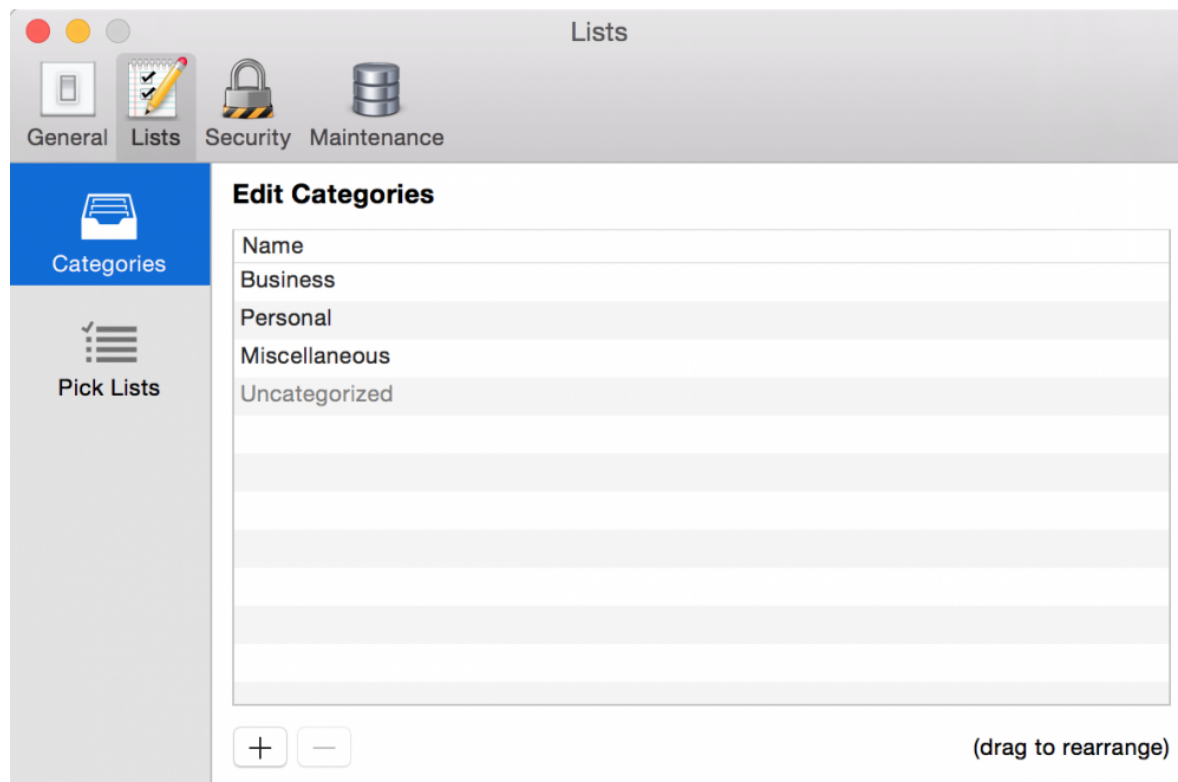
To delete a Saved Search, select your search, then right-click on it and select the **Delete Search** option. Or select it and then select the **Delete Search** menu item from the Forms menu.

# Categories

Categories are used to group forms together. Tap Forms ships with a few built-in categories, but you are free to modify them, delete them, or create your own.

## To manage your categories:

1. Click on the **Tap Forms** menu
2. Click on the **Preferences** menu item
3. Click on the **Lists** button.



You can drag the categories up and down to rearrange them. The list of forms on the left side of the main window will update when you rearrange your categories.

Double-click on a category name to edit the name.

Click the + button to add a new category.

Click the – button to delete the selected category.



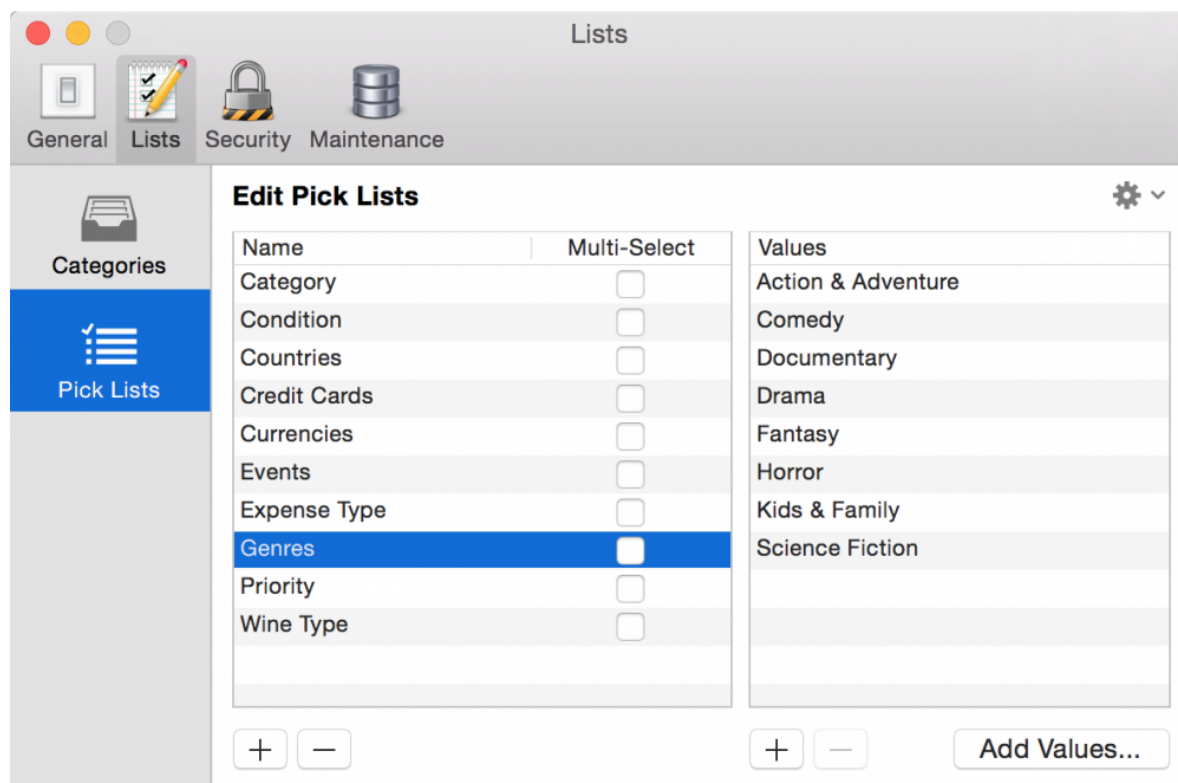
If you delete a category, all forms which belong to that category are moved into the Uncategorized category. You cannot delete the Uncategorized category.

# Pick Lists

Pick Lists are convenient lists of values that you can use on any Text or Number field in any form. You can even share the same Pick Lists between different forms and fields. You can create single select pick lists or multi-select pick lists. They both show the same information but multi-select pick lists allow you to select more than one value at a time. Single select pick lists allow you to select only a single value at a time.

## To manage your Pick Lists:

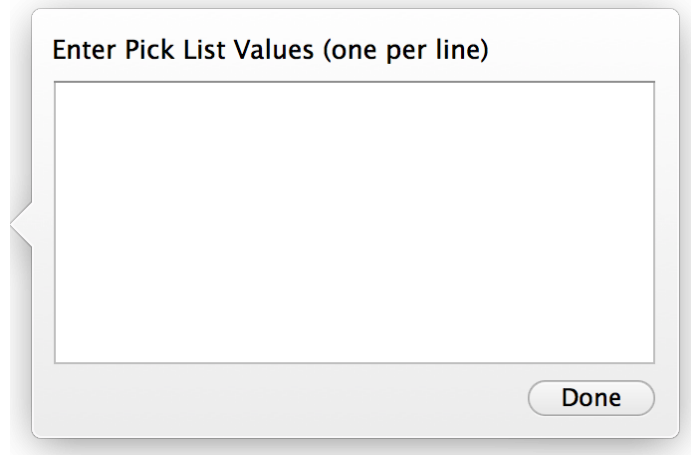
1. Click on the **Tap Forms** menu.
2. Click on the **Preferences** menu item.
3. Click on the **Lists** button.
4. Click on the **Pick Lists** button.



To add a new Pick List, click the + button at the bottom-left of the popover. Click the checkbox in the multi-select column to make the new Pick List a multi-select Pick List. A multi-select pick list will allow you to select more than one value to assign to a field.

To add a new value to the selected Pick List, click the + button beneath the values list.

If you have lots of values to add to a Pick List, it would be much quicker to click the **Add Values...** button and type your new values into the popover that is displayed. You can even paste values into the popover if you already have a list of values on your clipboard.

A popover window titled "Enter Pick List Values (one per line)". It contains a large, empty text area for input. At the bottom right of the popover is a button labeled "Done".

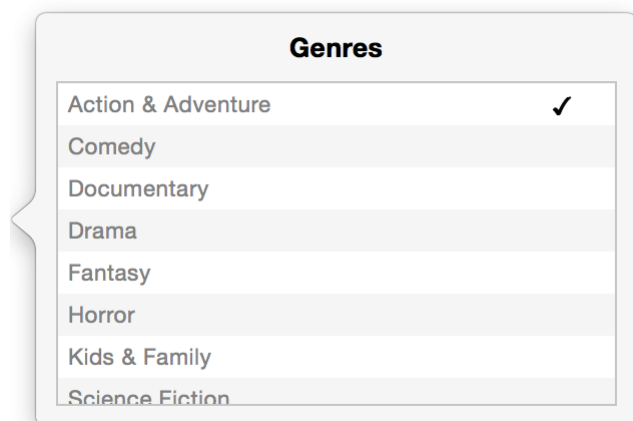
Enter Pick List Values (one per line)

Done

## To associate a Pick List with a field:

1. Click the form you want to edit.
2. Click the Form button in the toolbar.
3. Click the Fields tab.
4. Click the field that you'd like to assign the Pick List to.
5. Scroll to the bottom of the properties for the selected field and click the Pick List popup button.
6. Select the Pick List from the popup button.

You will now see the pick list button appear next to the field in the Default Layout, your custom layouts, and the multi-column list view.

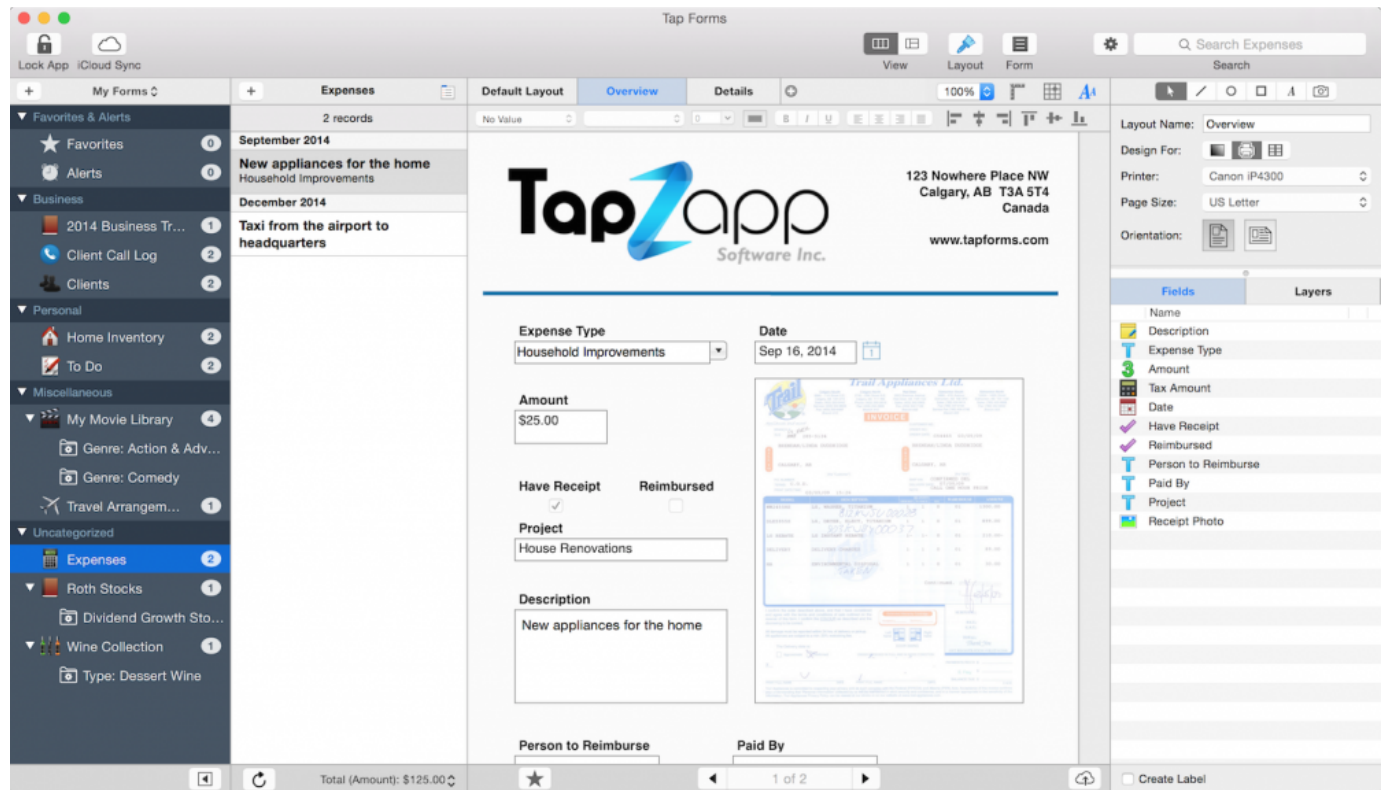
A pick list interface titled "Genres". It displays a list of genre options: Action & Adventure, Comedy, Documentary, Drama, Fantasy, Horror, Kids & Family, and Science Fiction. The "Action & Adventure" option is selected, indicated by a checkmark in a small box to its right.

**Genres**

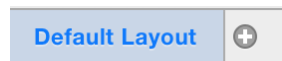
Action & Adventure	✓
Comedy	
Documentary	
Drama	
Fantasy	
Horror	
Kids & Family	
Science Fiction	

# Layout Designer

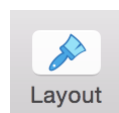
The new layout designer makes creating beautiful layouts as easy as dragging and dropping.



To create your first layout, click the **+** button beside **Default Layout**



The Layout Inspector panel will automatically display on the right when you add a new layout. But you can also display and hide the Layout Inspector Panel by clicking the Layout button in the toolbar at the top of the window:



Layout Name: Overview

Design For:

Printer: Canon iP4300

Page Size: US Letter

Orientation:

**Fields** | **Layers**

Name
Description
Expense Type
Amount
Tax Amount
Date
Have Receipt
Reimbursed
Person to Reimburse
Paid By
Project
Receipt Photo

☐ Create Label

The Layout Inspector provides you with tools to customize the layout of your form's fields and other graphic elements you might like to have on the page.

The **Layout Name** property allows you to set the name you'd like to give to your custom layout. The tab button that represents your layout will display this name. Clicking on that tab will switch to the selected layout. You can have as many layouts as you would like.

The **Design For** property allows you to select the purpose for the layout. You have three choices:

1. **Screen** lets you design a layout which will resize itself to fit the screen the layout is being displayed on. This is perfect for data entry layouts.
2. **Printer** lets you customize the design of a single page print layout. This is perfect for designing invoices, product marketing descriptions, mail merge letters, etc.



3. **Labels** lets you create a label template by selecting from more than 1000 Avery® label templates. You can also customize any of the built-in label templates or create your own from scratch.

The **Printer** property lets you select which printer you would like to print the layout to.

The **Page Size** property lets you select a paper size to print to. For example: Letter, Envelope, A4, etc.

The **Orientation** property lets you select from portrait or landscape. The page size on screen will resize appropriately according to the Page Size and Orientation properties you select.



The buttons at the top of the Layout Design View let you select a **Zoom Level**, turn on and off the **Text Inspector**, the **Rulers**, and the **Snap to Grid** functionality.

To the right at the top of the Layout Inspector panel are the layout design tools.



The **Arrow** tool lets you select, resize, and drag around the objects on your layout page.

The **Line**, **Oval**, and **Rectangle** tools allow you to draw lines, ovals and rectangles on the page. You can constrain the line, oval or rectangle by holding down the shift key as you drag a handle around on the page. You can change the stroke of a line, circle or rectangle to make it thicker or thinner. You can also change the stroke colour of lines, ovals, and rectangles using the Graphic Properties Inspector which will appear when you select an object. Ovals and rectangles can also have their fill colours changed.

The **Text** tool allows you to create blocks of text which will stay the same on every record. This would be useful for things like company names, addresses, or any other kind of text that you want to remain the same on every record.



**Mail merge.** If you enter a field name within square brackets in a static Text block, Tap Forms will replace the field name and square brackets with the value from the field for that record when you print your record. For example: "Dear **[First Name]**, the amount owing on your account is \$ **[Amount Owing]** ."

The **Image** tool allows you to create areas on the layout which will be filled with any image you have available on your computer. These images will stay the same on every record. This would be good for things like a company logo, icon, photo or any other kind of image you want to have on every record.



The Image tool is different than a Photo field in your form. A Photo field will change its image with every record while the Image tool's image will remain the same on every record.

## Layout Properties

The Layout Properties panel lets you change the layout name, what you're designing your layout for (screen or printer), set the printer, the page size, and the page orientation.

## Fields and Layers

The Fields list shows all the fields that are available to be dragged into the layout area. Below the Fields list is a checkbox which will tell Tap Forms to automatically create a label for you when you drag a field to the layout area. Labels will be given the default value of the field name, but they can be changed after they have been created. You can change label colours, fonts, sizes, and text alignment.

The Layers list shows all of the objects that are already on the page. You can drag these objects up and down to send them behind or in front of other objects. You can also lock objects so they can't be moved around accidentally.

## Text Inspector and Alignment Controls



The Text Inspector lets you set fonts, sizes, colours and text alignment (left, centre, right, or full). When the Text Inspector is visible you also have access to controls for aligning objects on the layout area. You can select multiple objects and align them all together using these controls.

Objects can have their left edges, right edges, bottom edges, and top edges aligned. They can also be aligned vertically or horizontally. The Layout menu also gives you some further options for sizing all the selected objects so they become the same width or height.

The Text Inspector can also be used when editing a record to set the text properties of a Note field. You can highlight some text and change the font, the font size, make it bold, italicized, underlined, or adjust the text's alignment.



To delete an object from your custom layout, just select it and press the Delete key on your keyboard. This will only work when the layout inspector panel is visible so that you're in layout design mode. To delete the field completely from your form, click on the Form button in the toolbar, then the Fields tab. Then click on the field you want gone forever, then press the – button to delete it. If you do that before deleting the object from your layout, the object on your layout will still be hanging around, but will be non-functional. So delete it from your custom layout first and then delete the field itself.

## Labels

Tap Forms has a very powerful label design engine built-in. You can select from over 1000 Avery® label templates, customize the built-in templates, or create your own from scratch.

Before you can select a label template, please create a new custom layout and choose the **Labels** option next to the **Design for** property in the **Layout Inspector** panel on the right. Once you do that, you'll see the **Select a Label** button appear.

Please see the [Layout Designer](#) chapter for more information.

The screenshot shows the 'Layout Inspector' panel in Tap Forms Mac. At the top is a toolbar with icons for selection, line, circle, square, text, and image. Below the toolbar, the 'Layout Name' field is set to 'My Labels'. The 'Background' field has a color picker. The 'Design For' field has three icons: a document, a printer, and a grid. The 'Printer' dropdown is set to 'Canon iP4300'. The 'Page Size' dropdown is set to 'US Letter'. The 'Orientation' field has two icons: a portrait document and a landscape document. Below these settings are two buttons: 'Select a Label...' and 'Edit Label...'. The 'Select a Label...' button is active, showing a preview of a label template. The preview is a 2x7 grid of labels, numbered 1 through 14. To the right of the preview, the text 'Easy Peel Address Labels' is displayed. Below this, the 'Label Size' is '1 1/3 x 4 in' and the 'Paper Size' is 'Letter'. At the bottom, there is a checkbox labeled 'Multiple Records Per Page' which is checked.

1	2
3	4
5	6
7	8
9	10
11	12
13	14

**Easy Peel Address Labels**

Label Size:  
1 1/3 x 4 in

Paper Size:  
Letter

☒ Multiple Records Per Page

When you click the **Select a Label** button, the following popover view will appear:

Filter by Paper Size: - All - Filter

1	2
3	4
5	6
7	8
9	10

Description	Size	Paper Size
Address Labels	99,1 x 63,5	A4
Address Labels	63,5 x 33,9	A4
Address Labels	63,5 x 38,1	A4
Address Labels	63,5 x 46,6	A4
Address Labels	99,1 x 34	A4
Address Labels	99,1 x 38,1	A4
Address Labels	63,5 x 72	A4
Address Labels	99,1 x 57	A4
Address Labels	99,1 x 42,3	A4
Address Labels	63,5 x 33,9	A4
Address Labels	63,5 x 38,1	A4
Address Labels	63,5 x 46,6	A4

Columns: 2 Rows: 5  
Left: 4.67 Top: 6 mm

Avery Product Code: J8173  
Orientation: Portrait

**Select**

You can filter labels by paper size or you can enter in a keyword or Avery Product Code to help you find the label type you're looking for. Click the **Select** button when you've found the label template you're looking for.

To customize the selected label or to create your own label from scratch, click on the **Edit Label** button.

The screenshot shows the 'Layout Designer' window in Tap Forms Mac. On the left, a preview of a label sheet is shown with a 2x5 grid of labels numbered 1 through 10. The 'Name' field is set to 'Address Labels' and 'Units' is set to 'Millimeters'. On the right, the 'Paper' settings are configured for A4 paper with a width of 210 and height of 297. The 'Label Size' settings are: Width: 99.06, Height: 57, and Corner Radius: 3. The 'Layout' settings are: Columns: 2, Rows: 5, Horizontal Space: 2.54, Vertical Space: 0, Left Margin: 4.67, and Top Margin: 6. A 'Save' button is located at the bottom right of the settings panel.

Section	Property	Value
Paper	Paper Size	A4
	Page Width	210
	Page Height	297
Label Size	Width	99.06
	Height	57
	Corner Radius	3
Layout	Columns	2
	Rows	5
	Horizontal Space	2.54
	Vertical Space	0
	Left Margin	4.67
	Top Margin	6

You can also choose to print the same label per page or you can select the **Multiple records per page** option which will tell Tap Forms to print a different record on each label. Printing the same record for each label would be very useful for printing something like a Business Card where you want the same information printed on each card. Printing multiple records per page would be perfect for printing Address Labels where you want a different address on each label.



If you don't see the **Multiple Records Per Page** option, drag the horizontal divider bar on the layout inspector panel down a little bit to reveal that option.

After you've selected or edited your label format, it's time to drag fields into the layout designer area and customize the design of your label. To get a larger view of your labels, adjust the zoom level to be higher than 100%.



To print your labels, select the Print function from the File menu and make sure you have the **Details (1 record per page)** option selected. Note, if you have **Multiple records per page** enabled for your label, you will still get multiple records per page printed, despite what the **Details** option says.

# Bento Template Importer

Tap Forms for Mac includes a Bento Template Import command to help you migrate from Bento to Tap Forms. Bento has been discontinued by FileMaker and is not fully compatible with OS X 10.10 Yosemite.



Tap Forms will import Bento 3.0 to 4.1 version templates. However, you will need version 4.0 or higher of Bento in order to be able to export your Bento data along with your templates. For optimum compatibility, please download the Bento 4.1.2 update from here: [http://help.filemaker.com/app/answers/detail/a\\_id/11182](http://help.filemaker.com/app/answers/detail/a_id/11182)

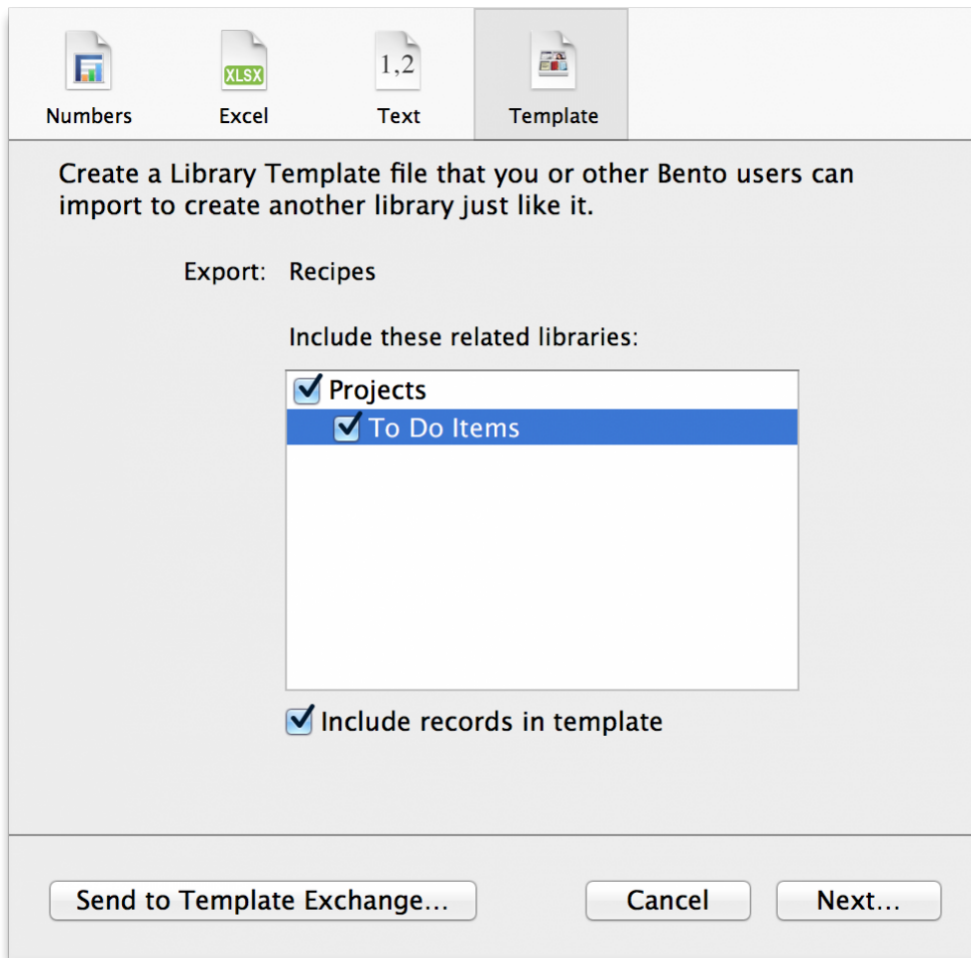
## To import your Bento template in Tap Forms:

### 1. Launch Bento and select your library.





## 2. Select Export... from the File menu and choose the Template option.

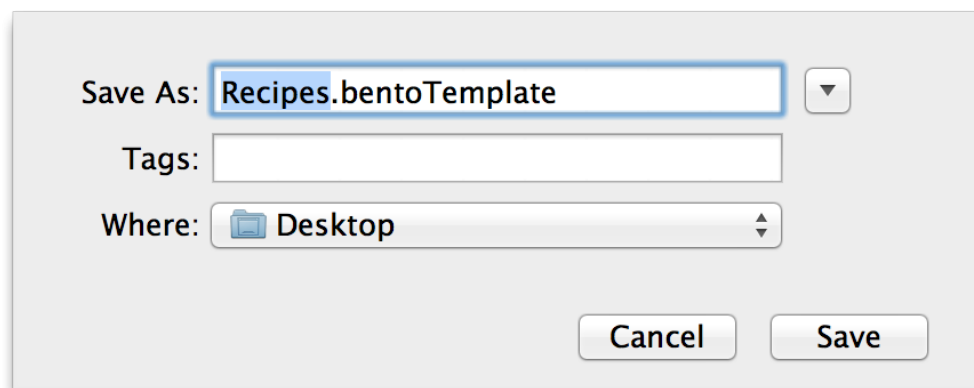


Make sure you click on each related library displayed in the “Include these related libraries” list if you want Tap Forms to be able to join your related forms together. Also click on “Include records in template” if you want Tap Forms be able to import your Bento data also.



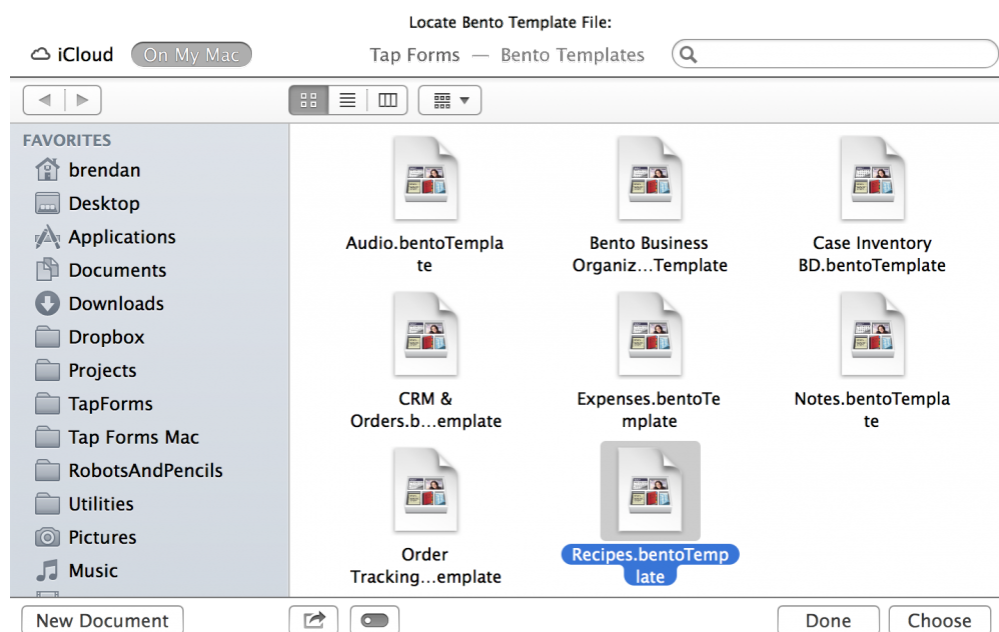
If you don't see the “Include records in template” option, then you're not using the latest version of Bento. You'll need to download that first before proceeding. The link is at the top of this page.

## 3. Save your template.



#### 4. Launch Tap Forms and select the “Import Bento Template” command from the File menu and select your Bento template file.

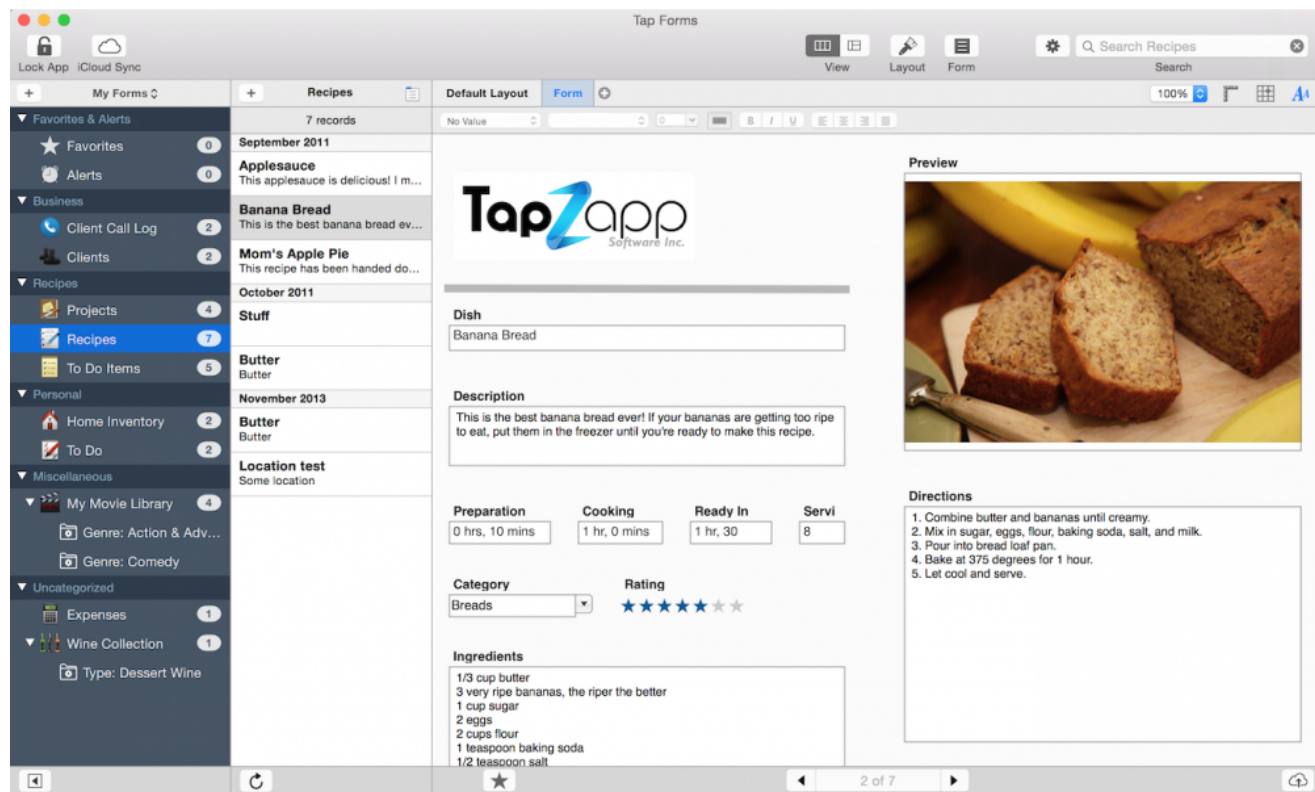
Click the Choose button when you’ve found your Bento template.



Tap Forms will now import your template and records.

If your template contains more than one related form, Tap Forms will automatically create a new category for you and put your related forms together inside that category. The category will be given a name based upon the file name of the template you are importing.

You will need to expand the category to view the forms by clicking on the triangle just to the left of the category name.



Once you've imported your Bento template, you can click on any of the layouts that Tap Forms generated from the Bento library. You may need to reposition some elements and/or make some adjustments to the font sizes and styles. Also, the **Date Created** and **Date Modified** fields are usually the first fields that get imported, so if you don't want them there you can just delete them in Tap Forms or move them down the list of fields in your form. Otherwise they'll be the first two fields which show up in the records list view. Most likely not the desired result.

## Bento Fields in Tap Forms

The following table describes how Tap Forms imports Bento forms and fields. Field types not on this list are not supported in Tap Forms.



**Note:** The **Simple List** field type in Bento is ignored when you import your Bento template into Tap Forms since that type is not supported by Tap Forms.

Bento	Tap Forms
Form	A Bento form is converted to a Tap Forms layout. Once you've imported a Bento template, you can further customize the layout in Tap Forms or add additional layouts to meet your needs.
Text	<p>Bento text fields can be one or more lines long. Tap Forms has 2 different text field types.</p> <ul style="list-style-type: none"> <li>• Text fields are used for shorter one-line bits of information, such as a Movie Title.</li> <li>• Note fields are used for larger amounts of text, such as a Movie Synopsis.</li> <li>• Tap Forms will convert Bento text fields into Text or Note fields depending on the height of the field in the Bento form.</li> <li>• Tall fields in Bento will be converted to Note fields in Tap Forms.</li> <li>• Small fields in Bento will be converted to Text fields in Tap Forms.</li> </ul>
Number	Bento Number fields are converted to Number fields in Tap Forms. The Number Formatter is set to Decimals.
Currency	Bento Currency fields are converted to Number fields in Tap Forms. The Number Formatter is set to Currency and the Decimal Places is set to 2. <b>Note:</b> Tap Forms supports only the currency that you have by default according to the system's regional settings. For example, in Canada, all currency values will be in CAD. In the UK, all currency values will be in GBP.
Counter	Counter fields are converted to Number fields.
Duration	Duration fields are converted to Number fields with the Number Formatter set to "hours, mins".
Rating	Rating fields are converted to Tap Forms Rating fields.
Dates and Times	Times are converted to Time fields. Dates are converted to Date fields. If the Date field has the flag to show the Time set, then it's converted to a Tap Forms Date & Time field.
Media	Media fields are converted to Photo fields. The photo file is also extracted and copied into the Tap Forms Photos folder.
Checkbox	Checkbox fields are converted to Checkmark fields.
Choice	Choice fields are converted to Text fields. The values in the Choice field are converted to a Pick List and associated with the Text field.

Calculation	Calculation fields are converted to Calculation fields. Tap Forms makes a best guess at trying to convert the Bento formula to a Tap Forms formula, but it's not going to be very accurate since Bento supports more calculation options than Tap Forms at this time. You will probably have to re-do your calculation formulas after the migration.
Location	Locations fields are converted to Location fields. The longitude and latitude values are also set as the location name in Tap Forms.
Phone	Phone number lists are converted to a Phone field in Tap Forms. Only the first phone number is imported. All other phone numbers in the list are ignored.
Email	Email lists are converted to an Email field in Tap Forms. Only the first email address is imported. All other email addresses in the list are ignored.
URL	URL fields are converted to a Website field. Only the first value is imported. All other URL values are ignored.
Related Records	Related Record fields are converted into Link to Form fields with the Many to Many Link Type set. Tap Forms also re-establishes the relationship data between forms.
File List	File List fields are converted to File Attachment fields with the Multi-File Enabled setting turned on. Files are copied into the Tap Forms Attachments folder.

The Bento Template Importer will be improved over time as new features are added to Tap Forms which match some of the features previously available in Bento.

# Import Records

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Tap Forms provides a wide variety of options for importing data from other applications. You can import both CSV text files and Excel XLSX worksheet files.

Before you can import a CSV file to Tap Forms you must export it from another app to a text file. The text file can have a .csv (comma separated values), .txt (text), or .tsv (tab separated values) file extension. These file types are all pretty much the same but contain slightly different column delimiters. Just make sure whatever column delimiter you use in the file, you set Tap Forms to use the same column delimiter.



When you import a CSV file, Tap Forms uses the first row of your file as the field names to create when you choose the New Form option. If you choose an existing form to import your records into, you must make sure that the first row values match the field names exactly as you have them named in your form. Otherwise Tap Forms will create a new field for every value in the first row which does not match a field name in the form you're importing into.

Importing XLSX files requires only that you have the first row in your Excel file be the names of the fields you would like to be in your form. Tap Forms will also only import the first sheet of data from the XLSX file. Make sure your data is structured as regular rows and columns. Tap Forms will not import any formatting information from an Excel worksheet file. The benefit of an XLSX file is you don't have to worry about things like column delimiters, line endings, or file encodings.



You should also make sure your field names are unique in the header row. Tap Forms uses the names of the fields in the first row to match up with the fields created in your form.

## Choose File

The first thing to do is click the Choose file button and then select a file you wish to import.

**Import Records**

1 **Choose a file to import**  
 Choose... My Movie Library.csv

2 **File encoding** **Column delimiter**  
 Unicode (UTF-8) Comma ,

**Date format** **Time format**  
 dd/MM/yyyy - 18/12/2014 No Value

3 **Select a form to import into**  
 New Form My Movie Library

4 **Assign field types**

Field Name	Field Value	Field Type
Case Cover	FEAAACBC-8AE1-4F7F-92...	Photo
Movie Title	Hunger Games	Text
Actor/Actress 1	Jennifer Lawrence	Text
Movie Details		Section Heading
Genre	Action & Adventure	Text
Summary	In a dystopian future, the t...	Note
Rating	5	Rating

◀ 1 of 4 ▶

Cancel Import

## File Encoding

It's very important to set the file encoding setting correct for the file you're trying to import. If you don't set it correctly, Tap Forms won't be able to understand all the characters in the file you're trying to import. This will most likely manifest itself in Tap Forms importing fewer rows than are actually in the file. Another issue that you might notice is strange garbage characters appearing instead of properly accented characters.



File encoding is just a way of describing to a computer which characters the data in the file represents. When you open a text file we just see characters, words and sentences. But to a computer, the file contains just a bunch of numbers all strung together. File encodings tell a computer what characters to display on screen when it encounters different numbers in a text file. For example, the character A is number 65, B is 66, and so on when using the ASCII file encoding format. UTF-8 is the most sensible file encoding to use because it can encode characters from any language on Earth. However, if you're importing from a Windows PC that exported a CSV file using Excel, you most likely want to use Windows Latin 1. On the Mac you may need to use Mac OS Roman file encoding.

## Column Delimter

✓ Comma ,  
Colon :  
Semi-colon ;  
Pipe |  
Tab

Tap Forms supports the following set of column delimiters: comma, semi-colon, tab, and pipe. Column delimiters help tell Tap Forms how to distinguish one field's value from the next. If you have a delimiter within your data then you must put double-quotes around the value. For example "Rolling Stones, The". Because there is a comma in the value, the entire value must be surrounded with double quotes. Mostly you never have to

worry about this sort of thing because programs like Excel and Numbers should automatically put double quotes around any data that contains a column delimiter within it. Tap Forms does then automatically when you export records.

## Date Format

✓ MM/dd/yyyy - 12/10/2013  
dd/MM/yyyy - 10/12/2013  
yyyy/MM/dd - 2013/12/10  
dd/MM/yy - 10/12/13  
MM/dd/yy - 12/10/13  
MM-dd-yyyy - 12-10-2013  
dd-MM-yyyy - 10-12-2013  
yyyy-MM-dd - 2013-12-10  
dd-MM-yy - 10-12-13  
MM-dd-yy - 12-10-13  
MM.dd.yyyy - 12.10.2013  
dd.MM.yyyy - 10.12.2013  
yyyy.MM.dd - 2013.12.10  
dd.MM.yy - 10.12.13  
MM.dd.yy - 12.10.13  
yyyy-MM-dd'T'HH:mm:ss - 2013-12-10T01:47:07  
yyyy-MM-dd'T'HH:mm:ssZ - 2013-12-10T01:47:07-0700

When you have a file that has dates in it, Tap Forms needs to be told how to interpret the date values. Is it month, day, year, or day, month, year? In order for Tap Forms to understand the date values in your file, you must tell it what format your date columns use. Tap Forms only understands date formats that are numeric based. So if you have a date in your file like "Dec 10, 2013" then you need to convert that to be "12/10/2013" or some other variation on a numeric date format. As long as it follows one of the formats displayed in the list of date formats in Tap Forms.

There are a couple Date & Time formats in the popup menu also. You can use these if your date has a combined date & time value within it that has the date and time separated by the letter T. For example, when Bento exports its Date & Time values it uses this format: yyyy-MM-dd'T'HH:mm:ss



## Time Format

HH:mm - 01:47  
 HH:mm zzz - 01:47 MST  
 HH:mm:ss - 01:47:07  
 HH:mm:ss zzz - 01:47:07 MST  
 ✓ h:mm a - 1:47 AM  
 h:mm a zzz - 1:47 AM MST  
 hh:mm a - 01:47 AM  
 hh:mm a zzz - 01:47 AM MST

Time formats follow the same principal as date formats. Just make sure your time format is set to be the same format as what is contained within your CSV file.

## Select a Form

You can either enter a name for a new form to be created, or if you already have a form that you'd like to import your CSV file into, select it from the list of available forms. If you select New Form, Tap Forms will create a new form for you using the field names from the first row of the CSV file.

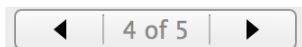
## Assign Field Types

It's important to tell Tap Forms before you import a CSV file what the field types are that it is importing. This helps Tap Forms to properly interpret the data being imported. If you don't do this and you try to change field types after then Tap Forms will appear to lose the values in the field for which you changed the type. The data is not gone, it's just stored in a different column in the database.



Tap Forms stores text data in a different column than it stores dates, numbers, location, or checkmark data. There are some fields which you can safely switch types. For example, switching a Text field to a Note field is safe. Switching a Rating field to a Number field is safe. But switching a Text field to a Date field is not safe.

## Record Navigator



Click the record navigator to flip through the records in your CSV file. This will help you to determine if you have your file encoding, column delimiter, and your date and time formats set correctly.

Click the **Import** button when you're ready to start the import process.

# Export Records

Along with importing CSV files, Tap Forms can generate CSV files so you can use your Tap Forms data in other applications.

To export your records, click the **File** menu and select **Export Records...**

**Export Records** My Movie Library

**Export as:** ☒ CSV ☐ Excel (xlsx)

**File encoding**  
Unicode (UTF-8)

**Column delimiter**  
Comma ,

**Date format**  
MM/dd/yyyy - 12/18/2014

**Time format**  
h:mm a - 1:35 AM

**Line Endings**  
Unix (LF)

**Number Format**  
No Value

☒ Export Record ID ☐ Field Type Tags

☐ Export Linked Records ☐ Export Media

**Fields:**

- ☒ Case Cover
- ☒ Movie Title
- ☒ Actor/Actress 1
- ☒ Movie Details
- ☒ Genre
- ☒ Summary
- ☒ Rating
- ☒ Year Released
- ☒ I Watched This
- ☒ Actor/Actress 2
- ☒ Actor/Actress 3
- ☒ Directed By

Cancel Export

The various options on the Export Records screen tell Tap Forms how to generate the file that you'll import into other applications.

## File Encodings

**✓ Unicode (UTF-8)**

Unicode (UTF-16)  
 Mac OS Roman  
 Windows Latin 1  
 ASCII  
 Arabic (Mac)  
 Arabic (Windows)  
 Cyrillic (Mac)  
 Cyrillic (Windows)  
 Greek  
 Hebrew (Mac)  
 Hebrew (Windows)  
 Japanese Shift JIS  
 Japanese EUC  
 Korean

As in the Import Records function, you can tell Tap Forms to export your file in a variety of file encodings. UTF-8 is generally the best encoding to use as it supports encoding characters in all languages. It may depend on the program you want to import your data into that dictates which file encoding you should use. Check the other program to see what file encodings it supports.

## Number Formats

No Style  
 Currency Style  
 ✓ Decimal Style  
 Percent Style  
 Scientific Style  
 Spell Out Style  
 Time (hrs, mins)  
 Time (HH:MM)

Tap Forms can also export Number fields in a variety of different formats. For the Currency format, Tap Forms will use your regional number format settings to determine what currency symbol to use during the export. For example, in Canada and the USA currency numbers will be exported like \$29.99, but in Europe the

same value would be exported as 29.99 €.

## Export Record ID

By enabling this option, you're telling Tap Forms to export the values that uniquely identify each record in your form. Tap Forms will add a column called `form_record_id` to your CSV file. If you import a file into Tap Forms which has a `form_record_id` column, it will search for matching records and update their field values rather than adding new records to your form.

## Export Linked Records

With this option enabled, Tap Forms will generate separate files containing the records from any linked forms. If you want to import these files into another copy of Tap Forms, make sure you import the parent form's CSV file first and then import the child records. That way Tap Forms will be able to join up all the child records to the parent records.

## Field Type Tags

By turning on Field Type Tags, you're telling Tap Forms to generate a header row that contains a tag that identifies the field's type.

The following are the tags that Tap Forms will generate

Tag	Field Type
<text>	Text

<number>	Number
<date>	Date
<time>	Time
<date_time>	Date & Time
<check_mark>	Checkmark
<contact>	Contact
<web_site>	Website
<note>	Note
<photo>	Photo
<audio>	Audio Recording
<phone>	Phone Number
<rating>	Rating
<location>	Location
<email>	Email Address
<calc>	Calculation
<file>	File Attachment
<form>	Link to Form
<draw>	Drawing
<section>	Section Heading
<date_created>	Date Created
<date_modified>	Date Modified

For example, a CSV export file of a movie library form would look something like this:

Movie Title<text>	Release Year<number>	Synopsis<note>	I Watched This<check_mark>
Terminator 2: Judgement Day	1991	The cyborg who once tried to kill Sarah Connor is dead, and another T-101 must now protect her teenage son, John Connor, from an even more powerful and advanced Terminator, the T-1000.	1

## Export Media

When you enable this flag, Tap Forms will generate a zip file that contains your records in CSV files and also a folder within the zip file that contain all of the media referenced in your records. Each media type will have a separate folder named with the name of the form being exported and the media type. For example “My Work Expenses-Photos”, “My Work Expenses-Files”, etc.

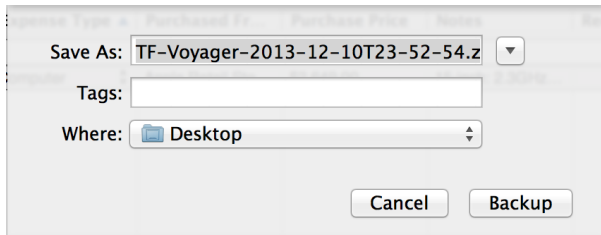


At the moment, file attachment fields with the multiple files setting enabled won't get exported into the zip file. That feature is coming in a future update.

# Backup & Restore

---

From the **File** menu, select **Backup...** to have Tap Forms generate a backup file for you.



Backups have file names that start with TF and end with .zip. The file name also contain the name of your computer and the timestamp of when you selected the Backup command. Backup files are just compressed files that contain your database file, photos, drawings, audio recordings, and file attachments. So you can double-click on one to uncompress it to see what's inside.

Choose the **Restore** command to select a backup file and restore it over top your current database.



Restoring will erase all the data in your current database and replace it with the data from the database file contained within the backup file.

# iCloud & Dropbox Sync

---

Tap Forms uses iCloud or Dropbox to sync data between your devices. For iCloud sync, Tap Forms uses the iCloud Drive service. So before you can enable iCloud sync in Tap Forms, please make sure you have iCloud Drive enabled in the iCloud settings on all your devices. For Dropbox syncing, please make sure you've installed the Dropbox app for your Mac and iOS devices.



iCloud sync is not available on the direct download version of Tap Forms Mac. This is because Apple doesn't allow apps with iCloud to be installed outside of the Mac App Store. It's a technical restriction, not a choice.



You will now need to set the encryption key to the same value on all of your copies of Tap Forms before you can sync between your devices. If you don't do that you will encounter a Sync Failed message. The Sync Failed message lists the things you need to do in order to get sync working.



OS X 10.10 Yosemite is required to sync with iOS 8. This is because iCloud Drive is not supported on OS X 10.9 or iOS 7 and earlier. However, if you use Dropbox for syncing, you can sync between Mavericks and Yosemite.




## Enable Sync in Tap Forms on all your devices.

1. Click Preferences from the Tap Forms menu.
2. Click the Sync button.
3. Choose a Sync Service (iCloud or Dropbox).
4. Click the Cloud Sync button in the toolbar on the main window.
5. Click on the Enable Sync checkbox.
6. Do the same on your other devices.
7. You will see each registered device listed underneath the Registered Devices list. You may need to close the Cloud Sync popover and reopen it for the list to refresh on the Mac version.

**Sync Settings**

General Lists Security Maintenance **Sync**

Select a Sync Service

None iCloud **Dropbox**


Sync Schedule




☒ Manually ☐ After launching app


☐ Hourly at 0 ☐ Before quitting app

☐ Daily at 4:29 PM

Last synced: 2015-05-14, 12:00 AM

 **Registered Devices:**

	Device Name	Last Synced	App Version
	iPhone 6	May 14, 2015, 12:04:00 AM	4.0.1
	Voyager	May 14, 2015, 12:00:17 AM	3.5.1
	iPad Air		4.0.1

☒ Enable Sync [Reset Sync](#) 



If you don't see all the devices you've enabled sync on in Tap Forms on the list of Registered Devices, then reboot all your devices. On iOS do a complete power off and then power on. Then check the list again.



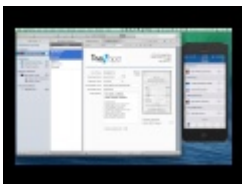
Whenever you want to send the changes you've made on your Mac to your other devices, click the upload to cloud button at the bottom-right of the window or in the Cloud Sync popover view. **Uploading to the cloud is a manual process.** The upload to cloud button is used ONLY for uploading your data to the cloud. Downloading from the cloud is an automatic process. You don't need to do anything to trigger a download from the cloud. Think of it like a game of ping pong sending your data back and forth from device A to device B back to device A, etc.



When you register a device with the cloud, your files will be copied from your device into your iCloud or Dropbox storage space. Depending on the size of your files (Photos, audio recordings, files in the Files area, etc.) and the number of them, it may take quite a while for them to be uploaded and synced to your other devices. During this time, the Cloud Sync popover may take considerable time to return the list of registered devices to you. Please be patient and wait a while before trying again. You can continue to use Tap Forms while this happens automatically in the background.

## Sync in Action

Watch this Youtube video to see how iCloud sync is used in Tap Forms. The process is the same for Dropbox once the setup is complete.



## Reset Sync

Sometimes your devices may get out of sync. To get them back in sync again, please follow this procedure exactly. If you don't have a Mac, just substitute one of your iOS devices for the Mac in these instructions.

1. Press Reset Sync on your Mac.
2. Press Reset Sync on your iOS devices.
3. Wait a minute or two for the cloud to notice these changes.
4. Re-enable Cloud Sync on your Mac and your iOS devices.
5. Wait for all devices to appear in the list of Registered Devices on each device. So all devices should "see" each other.
6. Press the upload to cloud button only on your Mac or iOS device that has all the most up-to-date records.

7. Wait for your other devices to auto-sync. DON'T press the upload to cloud button on those other devices while you wait for the auto-sync to kick in.
8. Press the upload to cloud button only on the one device at a time. DON'T press the upload to cloud button on any other device. Just wait for the auto-sync to kick in on your other devices.

You should now be in sync again. From now on, just do it like that. Make changes on one device and press the upload to cloud button only on the device you made changes on. Let your other devices auto-sync those changes.

# Relationships

---

Tap Forms has the ability to link forms together to establish relationships between them. There are currently two types of links:

1. One to Many
2. Many to Many

To make it easier to identify what is being talked about in this section of the documentation, I'll refer to the main form as the **parent** form. Any form that the main form links to will be called the **child** form.















## One to Many

The One to Many link type is useful in situations where the child form's data is unique to the parent record it's linked to. That is, no two parent records should link to the exact same records from the child form. It's easiest to describe this situation using an example.

## Keeping Track of Clients and Expenses

If you wanted to keep track of all the expenses you incur when working for a specific client, you wouldn't want those expenses to be linked to any other client than the one for whom you are currently working. A one to many relationship is useful in this situation. One client has many unique expenses which are attributable only to it.

**Create a Client Expenses form:**

Form	Fields
	<div><div> Description</div><div> Expense Type</div><div> Amount</div><div> Date</div><div> Have Receipt</div><div> Reimbursed</div><div> Person to Reimburse</div><div> Paid By</div><div> Project</div><div> Receipt Photo</div><div> Clients</div></div> <div><div></div><div></div><div></div><div>(drag to rearrange)</div></div>

**Create a Clients form and link it to the above Client Expenses form:**

The screenshot shows the 'Fields' configuration window in Tap Forms Mac. At the top, there are two tabs: 'Form' and 'Fields'. Below the tabs is a list of fields: 'Postal Code', 'Country', 'Docs', 'Client Documents', 'Client Call Log' (which is highlighted), and 'Client Invoices'. Each field has a small icon to its left. Below the list are three buttons: a plus sign (+), a minus sign (-), and a document icon with a plus sign. To the right of these buttons is the text '(drag to rearrange)'. Below this is a section for configuring the selected field, 'Client Call Log'. It includes a 'Field Name' label and a text box containing 'Client Call Log'. Below that is a 'Type' label and a dropdown menu showing 'Link to Form'. Then there is a 'Label Color' label and a color picker showing black. Below that is a checked checkbox for 'Export'. Then there is a 'Link Type' label and two radio buttons: 'One to Many' (which is selected) and 'Many to Many'. Below that is a 'Link to Form' label and a dropdown menu showing 'Client Call Log'. Finally, there is a checked checkbox for 'Show Inverse Relationship'.

Make sure you've selected **One to Many** as the Link Type.



A note about the **Show Inverse Relationship** option. You can enable the Show Inverse Relationship option if you would like Tap Forms to manage both sides of the relationship for you. Enabling the Show Inverse Relationship option will automatically create a **Link From Form** field which will show you which parent record linked to the record you're viewing. In our example that means a Client Expense record will display a field that links back to the Client form so for any selected Client Expense record, you'll easily be able to see which Client it belongs to.



Don't create your own **Link From Form** field. Tap Forms will create it and set it up properly for you when you enable the **Show Inverse Relationship** option.

Now when you add or edit a record on your Client form, you can see the list of Client Expenses. Initially there will be none, but you can click the + button above the list of Client Expense records to add one. By adding a record from this view Tap Forms will link the new Client Expense record to the parent Client record.

The screenshot shows the Tap Forms Mac application interface. The left sidebar contains a navigation menu with categories like 'Favorites & Alerts', 'Business', 'Personal', and 'Miscellaneous'. The 'Clients' form is displayed in the main area, showing fields for Company, Full Name, Contact, Website, First Name, Last Name, Phone Number, Email Address, Street Address, City, Province, Postal Code, and Country. Below these fields is a 'Client Expenses' section with a table of expense records. The table has columns for Description, Expense Type, Amount, Date, Have Receipt, Reimbursed, and Person. Two records are shown: 'Lunch meeting with client' and 'Pick up Client from Airport'. A 'Total: \$164.54' is displayed at the bottom of the table. A '+ -' button is located below the table to add or remove records. The 'Team Members' section is also visible at the bottom of the form.

Description	Expense Type	Amount	Date	Have Receipt	Reimbursed	Person
Lunch meeting with client	Meal	\$99.54	Feb 19, 2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Pick up Client from Airport	Transportation	\$65.00	Feb 17, 2016	<input type="checkbox"/>	<input type="checkbox"/>	
		<b>Total: \$164.54</b>				

When you add a child record to the parent record form, Tap Forms will switch the display to the child form (in this case Client Expenses) along with a back button which when clicked will return you to the parent record from where you came.

This close-up shows the top of the 'Client Expenses' form. A red box highlights a back button (a left-pointing arrow) located to the left of the 'Default Layout' tab. The tabs include 'Default Layout', 'Overview', and 'Details'. Below the tabs, there is a calculator icon and the text 'Client Expenses'.

## Many to Many

An example of a Many to Many link could be a list of team members who are assigned to projects for the selected Client.

**Add a Team Members form that contains a list of people that work at your company. You could add their name and job title.**

The screenshot shows the Tap Forms Mac interface. The top bar has two tabs: 'Form' and 'Fields'. The 'Fields' tab is selected. Below the tabs is a list of form fields. Each field has a blue icon to its left: a 'T' for text, an '@' for email, and a document icon for the Clients field. The fields are: First Name, Last Name, Email Address, Street, City, Province, Industry, and Clients. Below the list are three empty rows. At the bottom of the canvas are three buttons: a plus sign, a minus sign, and a copy icon, followed by the text '(drag to rearrange)'.

Now add the linked form field to the original Clients form:

The screenshot displays the 'Fields' configuration window in Tap Forms Mac. At the top, there are two tabs: 'Form' and 'Fields', with 'Fields' being the active tab. Below the tabs is a list of form fields. The fields are: Last Name (with a person icon), Phone Number (with a phone icon), Email Address (with an @ icon), Street Address (with a 'T' icon), City (with a 'T' icon), Province (with a 'T' icon), Postal Code (with a 'T' icon), Country (with a 'T' icon), Client Expenses (with a document icon), Team Members (with a document icon and highlighted), Client Documents (with a document icon), and Client Call Log (with a document icon). Below the list are three buttons: a plus sign (+), a minus sign (-), and a document icon with a plus sign, followed by the text '(drag to rearrange)'. Below the list is a configuration panel for the selected 'Team Members' field. It contains the following sections: 'Field Name' with a text box containing 'Team Members'; 'Type' with a dropdown menu showing 'Link to Form'; 'Label Color' with a color picker; 'Export' with a checked checkbox; 'Link Type' with two radio buttons, 'One to Many' and 'Many to Many' (the latter is selected); 'Link to Form' with a dropdown menu showing 'Team Members'; and 'Show Inverse Relationship' with a checked checkbox.

Make sure you click on **Many to Many** for the Link Type and select the Team Members form from the Link to Form property.

Now when you view your Client record the list of Team Members will initially be empty:



Default Layout
100%
→
A4

**Clients**

Company

Full Name

Contact

Website

First Name

Last Name

Phone Number

Email Address

Street Address

City

Province

Postal Code

Country

Client Expenses

Team Members

Tap Forms Developers

Brendan Duddridge

John Doe

www.tapforms.com

Brendan

Duddridge

(408) 555-1212

support@tapforms.com

123 Tap Forms Way

Tech Town

Alberta

T2T 2T2

Canada

Description

Expense Type

Amount

Date

✕

Lunch meeting with client
Meal
\$99.54
Feb 19, 2016

Pick up Client from Airport
Transportation
\$65.00
Feb 17, 2016

Total: \$164.54

+ - ↻ Σ 2 records

First Name

Last Name

Email Address

Street

City

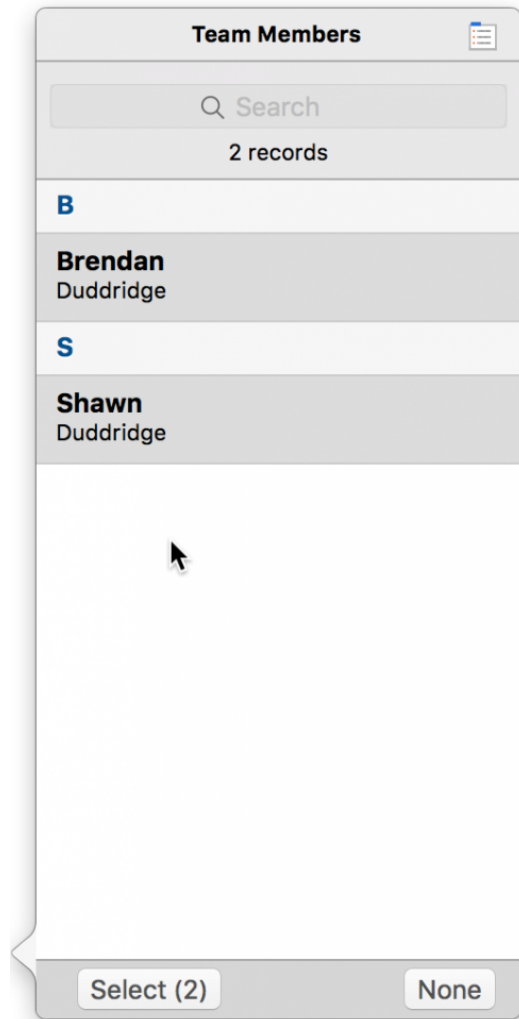
✕

no records

After you've added some Team Members you'll be able to select from the list of Team Members by clicking on the checkmark button just below the linked field.



This will display a popover with a list of child records which haven't yet been linked to your parent record.



Select one or more records from the popover and then click the Select (#) button.

Default Layout
100%
→
A4

## Clients

<b>Company</b>	Tap Forms Developers																							
<b>Full Name</b>	Brendan Duddridge																							
<b>Contact</b>		John Doe																						
<b>Website</b>		www.tapforms.com																						
<b>First Name</b>	Brendan																							
<b>Last Name</b>	Duddridge																							
<b>Phone Number</b>		(408) 555-1212																						
<b>Email Address</b>		support@tapforms.com																						
<b>Street Address</b>	123 Tap Forms Way																							
<b>City</b>	Tech Town																							
<b>Province</b>	Alberta																							
<b>Postal Code</b>	T2T 2T2																							
<b>Country</b>	Canada																							
<b>Client Expenses</b>		<table> <thead> <tr> <th>Description</th> <th>Expense Type</th> <th>Amount</th> <th>Date</th> <th></th> </tr> </thead> <tbody> <tr> <td>Lunch meeting with client</td> <td>Meal</td> <td>\$99.54</td> <td>Feb 19, 2016</td> <td></td> </tr> <tr> <td>Pick up Client from Airport</td> <td>Transportation</td> <td>\$65.00</td> <td>Feb 17, 2016</td> <td></td> </tr> <tr> <td colspan="2"></td> <td><b>Total: \$164.54</b></td> <td></td> <td></td> </tr> </tbody> </table>			Description	Expense Type	Amount	Date		Lunch meeting with client	Meal	\$99.54	Feb 19, 2016		Pick up Client from Airport	Transportation	\$65.00	Feb 17, 2016				<b>Total: \$164.54</b>		
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First Name	Last Name	Email Address	Street	City																				
Brendan	Duddridge	support@tapfo...	123 Tap Zapp...	Calgary																				
Shawn	Duddridge	sduddridge@y...	999 Tap Zapp...	Calgary																				

The list of linked records will update to show the records you've previously selected and the records you've just selected.

And that's the difference between a **One to Many** and a **Many to Many** Link to Form field.

# Menu Commands

---

Tap Forms gives you the ability to perform a variety of commands on forms, records, and layouts. For example, you can delete a form, duplicate a form, share a form template with others, and import a form template you've been given by others. You can create new records, delete records, duplicate records.

## File

Import Records...	
Export Records...	
Import Form Template...	
Export Form Template...	
Import Bento Template...	
Backup...	
Restore...	
Close	⌘W
Print...	⌘P
All Forms	⌘1
My Forms	⌘2
Single Column View	⌘3
Multi-Column View	⌘4

**The File menu contains a variety of commands for exchanging your data with others.** It contains commands for importing records, exporting records, importing form templates, exporting form templates, importing Bento templates, backing up your database, restoring your database and printing your forms. Other topics in this guide will go through each of these options in detail.

## View

**The View menu lets you switch between different views.** You can switch between the All Forms and My Forms lists of forms and between the Single-Column and Multi-Column records list views.

## Forms

New Form...	⇧ ⌘N
Edit Form...	⇧ ⌘E
Duplicate Form	⇧ ⌘D
Delete Form...	⇧ ⌘⌘
New Form...	⇧ ⌘N
Edit Form...	⇧ ⌘E
Duplicate Form	⇧ ⌘D
Delete Form...	⇧ ⌘⌘

**To delete a form, select a form and click the Forms menu. Then select the Delete Form command.**

When you delete a form, Tap Forms will delete all of the records and all of the photos and files associated with the records in the form.

**To duplicate a form, select a form and click the Forms menu. Then select the Duplicate Form command.**

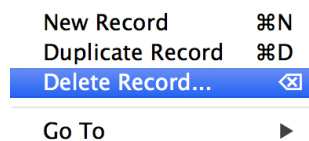
When you duplicate a form, Tap Forms duplicates just the form template, not any of the records. Custom layouts are also duplicated along with the form template.



After you've made a duplicate of your form, you will not see the default or custom layouts displayed just yet. To see these views, press the + button on the records list view to create a new record. Once a new record has been created in your form, the Default Layout and any custom layouts that were in the original form will also be displayed.

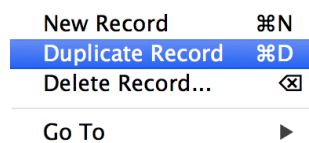
You can also access these commands by right-clicking on the selected form in the My Forms or All Forms list.

## Records



**To delete a record, select a record and click the Records menu. Then select the Delete Record command.**

When you delete a record, Tap Forms will delete all of the photos and files associated with the selected record.



**To duplicate a record, select a record and click the Records menu. Then select the Duplicate Record command.**

When you duplicate a record, Tap Forms will duplicate all of the photos, drawings, and audio recordings associated with the record. File Attachments will not be duplicated at this time.

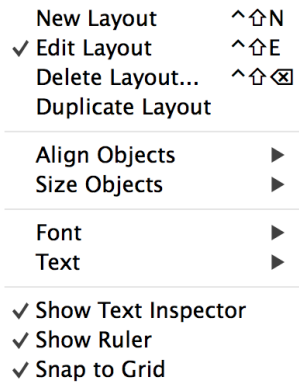
You can also access the Duplicate and Delete commands by right-clicking on the selected record.

## Go To



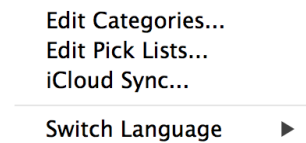
**You can use the keyboard to quickly navigate between records.** Command-] will move to the next record. Command-[ will move to the previous record. Command-shift-[ will move to the first record. And command-shift-] will move to the last record in your form.

## Layout



**The layout menu provides a variety of commands for managing your custom layouts.** From here you can edit layouts, duplicate layouts, delete layouts and perform a variety of commands on items in your custom layouts.

## Tools



**The tools menu just gives you an alternate way of gaining access to the Pick Lists popover, the Categories popover, and the iCloud Sync popover.** You can also access the Switch Languages function here.

## Switch Language



**Tap Forms supports a variety of languages.** By selecting a language here, Tap Forms will translate the built-in forms and fields into the language selected. Regular user interface items such as menus, buttons and other text in Tap Forms will display automatically based upon your computer's language setting. Tap Forms only supports the languages listed here.


# Barcodes

Tap Forms can now generate and print 24 different kinds of barcodes.

The following barcode symbologies are supported:

Coda bar	Code 39 modulo 43	Facing Identification Mark	Pharmacode One Track
Code 11	Code 93	Interleaved 2 of 5	POSTNET
Code 128	EAN 13	ISBN	QR Code
Code 39	EAN 2 Supplement	ISMN	Standard 2 of 5
Code 39 Full ASCII	EAN 5 Supplement	ISSN	UPC A
Code 39 Full ASCII modulo 43	EAN 8	MSI (Modified Plessey)	UPC E

**Edit Barcode**



QR Code

Sample Barcode Value

Options

☐ Display Caption

☐ Display Check Digits

☐ Fill Quiet Zones

Caption Overlap

## To configure your barcode:

1. Click on the Form button in the toolbar.

2. Click the Fields tab.
3. Find the field you would like a barcode generated for and click on it.
4. Click on the Display as Barcode checkbox in the field's properties pane down below.
5. Click on the Edit Barcode button.
6. Select a barcode symbology. You can enter sample text to see how it will look.

## To display your barcode:

1. Follow the instructions in the [Layout Designer](#) topic to create a new custom layout.
2. Drag your barcode field into your custom layout.
3. Resize your barcode to fit the area required.

A great use of the new labels feature is to put a barcode onto a label and print them out to stick them on anything you want barcodes on.

## To print your barcodes:

1. Select the custom layout which contains your barcode.
2. Select the Print command from the File menu.
3. Click the Print button.



Printer: Canon iP4300

Presets: Default Settings

Copies: 1

Pages: ☒ All  
☐ From: 1 to: 1

Paper Size: A4 210 by 297 mm

Orientation:

Tap Forms

**Print:**

☒ Print selected records  
☐ Print all records

**Print Layout:**

☐ Table of records  
Row Height:   
☒ Include field names header  
☐ First page only  
☒ Each page  
☒ Details (1 record per page)

**Options:**

☒ Include page numbers  
☐ Include form name  
☒ Alternating rows

**Fields:**

- ☒ Case Cover
- ☒ Movie Title
- ☒ Actor/Actress 1
- ☐ Movie Details
- ☒ Genre
- ☐ Barcode
- ☐ Summary
- ☒ Rating
- ☒ Year Released
- ☐ I Watched This
- ☐ Actor/Actress 2

Select All None

☒ Include date  
☒ Include time  
☐ Show field borders

? PDF Hide Details Cancel Print

If you're printing just a single label on one page, select the **Print selected records** option. If you want to print different barcodes for each label, select the **Multiple records per page** option for your label and then select the "Print all records" option on the Print sheet.

# Printing

---

Tap Forms has 4 different ways of printing your records:

1. Record Details with the Default Layout
2. Record Details with a Custom Layout
3. Table of records in a list format
4. Labels in a grid format

To print your data, click on the **File** menu and then click on the **Print** menu item.

## 1. Record Details with the Default Layout

The benefit of printing the Default Layout is that it's quick to get a nice printed report of your record details. Also, if a single record is quite long, Tap Forms will intelligently span the printout of the record across multiple pages, avoiding cutting off the contents of an individual field across pages.

Initially when you display the Print sheet, it will appear with only the very basic print settings.

To see the advanced print settings, click on the **Show Details button**.

You can also use the Fields list to select which fields you would like to print or not print. Tap Forms will make sure there are no gaps in the printout as you enable or disable different fields.


Printer: Canon iP4300

Presets: Default Settings

Copies: 1

Pages: All

My Movie Library

Case	
Movie Title	Terminator 2 : Judgement Day
Actor/Actress 1	Arnold Schwarzenegger
Movie Details	
Genre	Action & Adventure
Summary	Almost 10 years have passed since the first cyborg called The Terminator tried to kill Sarah Connor and her unborn son, John Connor. John Connor, the future leader of the human resistance, is now a healthy young boy. However another Terminator is sent back through time called the T-1000, which is more advanced and more powerful than its predecessor. The Mission: to kill John Connor when he's still a child. However, Sarah and John do not have to face this threat of a Terminator alone. Another Terminator is also sent back through time. The mission: to protect John and Sarah Connor at all costs. The battle for tomorrow has begun...
Rating	★★★★★

Dec 15, 2014, 1:01:43 AM - 1 -

<< < 1 of 8 > >>

? PDF Show Details Cancel Print

The print sheet will expand to display many more options for printing, including a variety of Tap Forms specific options.

My Movie Library

Case:

Movie Title: Terminator 2 - Judgment Day

Actor/Actress 1: Arnold Schwarzenegger

Movie Details:

Genre: Action & Adventure

Summary: Almost 10 years have passed since the first cyborg called **The Terminator** tried to kill **Sarah Connor** and her unborn son, **John Connor**. **John Connor**, the future leader of the human resistance, is now a healthy young boy. However another Terminator is sent back through time called the **T-1000**, which is more advanced and more powerful than its predecessor. The Mission: to kill **John Connor** when he's still a child. However, **Sarah** and **John** do not have to face this threat of a Terminator alone. Another **Terminator** is also sent back through time. The mission: to protect **John** and **Sarah Connor** at all costs. The battle for tomorrow has begun...

Rating: ★★★★★

Dec 18, 2016, 9:11:00 AM

1 of 8

Printer: Canon iP4300

Presets: Default Settings

Copies: 1

Pages: All

Paper Size: US Letter 216 by 279 mm

Orientation: Portrait

Tap Forms

**Print:**

☐ Print selected records

☒ Print all records

**Print Layout:**

☐ Table of records

Row Height:

☒ Include field names header

☐ First page only

☒ Each page

☒ Details (1 record per page)

**Options:**

☒ Include page numbers

☒ Include form name

☒ Alternating rows

**Fields:**

☒ Case

☐ Check Mark

☒ Movie Title

☒ Actor/Actress 1

☒ Movie Details

☒ Genre

☒ Summary

☒ Rating

☒ Year Released

☒ I Watched This

☒ Actor/Actress 2

Select All None

☒ Include date

☒ Include time

☒ Show field borders

? PDF Hide Details Cancel Print

The top area of the print sheet contain standard print settings that are available in most apps. You can select the printer, the number of copies, which pages to print, the paper size, and the paper orientation.

The bottom area contains options specific to Tap Forms.

Most of the options in the Tap Forms area are only relevant for printing the Default Layout and the Table of records layout. They have no effect on printing custom layouts other than the following options:

1. Print selected records – to print just the records you’ve selected in the records list view.
2. Print all records – no matter how many records are selected.
3. Print field borders – to enable or disable printing of any borders around fields in your custom layout.

## 2. Record Details with a custom layout

There’s not much difference in the print sheet when you’re printing a custom layout.

The screenshot displays the Tap Forms Mac application interface. On the left, a preview of a form titled "The Hunger Games" is shown. The form includes a movie poster, a title field, an Actor/Actress 1 field (Jennifer Lawrence), a Genre field (Action & Adventure), a Rating field (4 stars), a Summary field, a Year field (2012), a Directed By field (Gary Ross), and an IMDb Website field (http://www.imdb.com/title/tt1382170). Below the preview are navigation buttons: <<, <, 1 of 1, >, >>.

On the right, the print settings are configured. The Printer is set to "Canon iP4300" and Presets to "Default Settings". Copies are set to 1. Pages are set to "All" (radio button selected). Paper Size is "US Letter" (216 by 279 mm). Orientation is set to "Portrait" (radio button selected). The Tap Forms dropdown menu is open, showing the "Print" section with options: "Print selected records" (radio button selected) and "Print all records" (radio button unselected). The "Print Layout" section has options: "Table of records" (radio button unselected) and "Details (1 record per page)" (radio button selected). The "Options" section has checkboxes for "Include page numbers", "Include form name", "Alternating rows", "Include date", "Include time", and "Show field borders". The "Fields" section lists fields to be printed: Case Cover, Movie Title, Actor/Actress 1, Movie Details, Genre, Summary, Rating, Year Released, I Watched This, Actor/Actress 2, and Actor/Actress 3. All fields are checked. At the bottom, there are buttons for "?", "PDF", "Hide Details", "Cancel", and "Print".

### 3. Table of records in a list format

If you need to print multiple records per page in a list format with headers and footers, then use this print layout. Tap Forms will print as many columns as will fit on a single page width. You can change to landscape orientation to get more room to print additional columns. You can also enable or disable different fields to print on the list view.

**My Movie Library**

Movie Title	Actor/Actress 1	Genre	Rating	Year Released	Watched By
Terminator 2: Judgment Day	Arnold Schwarzenegger	Action & Adventure	★★★★★	1991	James Cameron
The Hangover Classics	Ben Stiller, Bradley Pitt, & Robert Downey Jr.	Comedy	★★★★★	2012	Garry Ross
Office Space	Comedy	★★★★★	1999	Mike Judge	
The Shawshank Redemption	Tim Robbins, Morgan Freeman	Drama	★★★★★	1994	Frank Darabont

1 of 1

**Printer:** Canon iP4300

**Presets:** Default Settings

**Copies:** 1

**Pages:** ☒ All ☐ From: 1 to: 1

**Paper Size:** US Letter 216 by 279 mm

**Orientation:** ☒ Portrait ☐ Landscape

**Tap Forms**

**Print:**

☐ Print selected records

☒ Print all records

**Print Layout:**

☒ Table of records

Row Height:

☒ Include field names header

☐ First page only

☒ Each page

☐ Details (1 record per page)

**Options:**

☒ Include page numbers

☒ Include form name

☒ Alternating rows

**Fields:**

- ☒ Case
- ☐ Check Mark
- ☒ Movie Title
- ☒ Actor/Actress 1
- ☐ Movie Details
- ☒ Genre
- ☐ Summary
- ☒ Rating
- ☒ Year Released
- ☐ I Watched This
- ☐ Actor/Actress 2

**Select All** **None**

**Options:**

☒ Include date

☒ Include time

☒ Show field borders

**PDF** **Hide Details** **Cancel** **Print**



If you switch to the Multi-column List View before you print, Tap Forms will use the column widths you've specified there for the column widths of the printout when printing the table of records. By adjusting the widths of the columns when viewing your list of records, you can control how the table of records is printed. This may help you to get more columns printed on the page than would otherwise be possible.

Most of the options on the print sheet will have some effect on the printout. For example, you can enable or disable the printing of the form name, the date, the time, and choose whether or not you want alternating light and dark row backgrounds for your records.

## 4. Labels in a grid format

Brendan Duddridge

129 Tap Zapp Place

Category AB HSH QHO

Canada

Brendan Duddridge

129 Tap Zapp Place

Category AB HSH QHO

Canada

Brendan Duddridge

129 Tap Zapp Place

Category AB HSH QHO

Canada

Brendan Duddridge

129 Tap Zapp Place

Category AB HSH QHO

Canada

Brendan Duddridge

129 Tap Zapp Place

Category AB HSH QHO

Canada

Brendan Duddridge

129 Tap Zapp Place

Category AB HSH QHO

Canada

<<

<

1 of 3

>

>>



Printer: Canon iP4300

Presets: Default Settings

Copies: 1

Pages: ☒ All  
☐ From: 1 to: 1

Paper Size: A4 210 by 297 mm

Orientation:  

Tap Forms




Print:

☐ Print selected records

☒ Print all records

Print Layout:

☐ Table of records

Row Height:   

☒ Include field names header

☐ First page only

☒ Each page

☒ Details (1 record per page)

Options:

☒ Include page numbers

☒ Include form name

☒ Alternating rows

Fields:

☒ Company

☒ Primary Contact

☒ Full Name

☒ Website

☒ First Name

☒ Last Name

☒ Phone Number

☒ Email Address

☒ Street Address

☒ City

☒ Province

Select All

None

☒ Include date

☒ Include time

☐ Show field borders

?

PDF

Hide Details

Cancel

Print

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# Preferences

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To access various other settings for Tap Forms, click on the Tap Forms item in the menubar at the top of the screen, then click on the **Preferences** menu command.

There are 4 preference panels to select from:

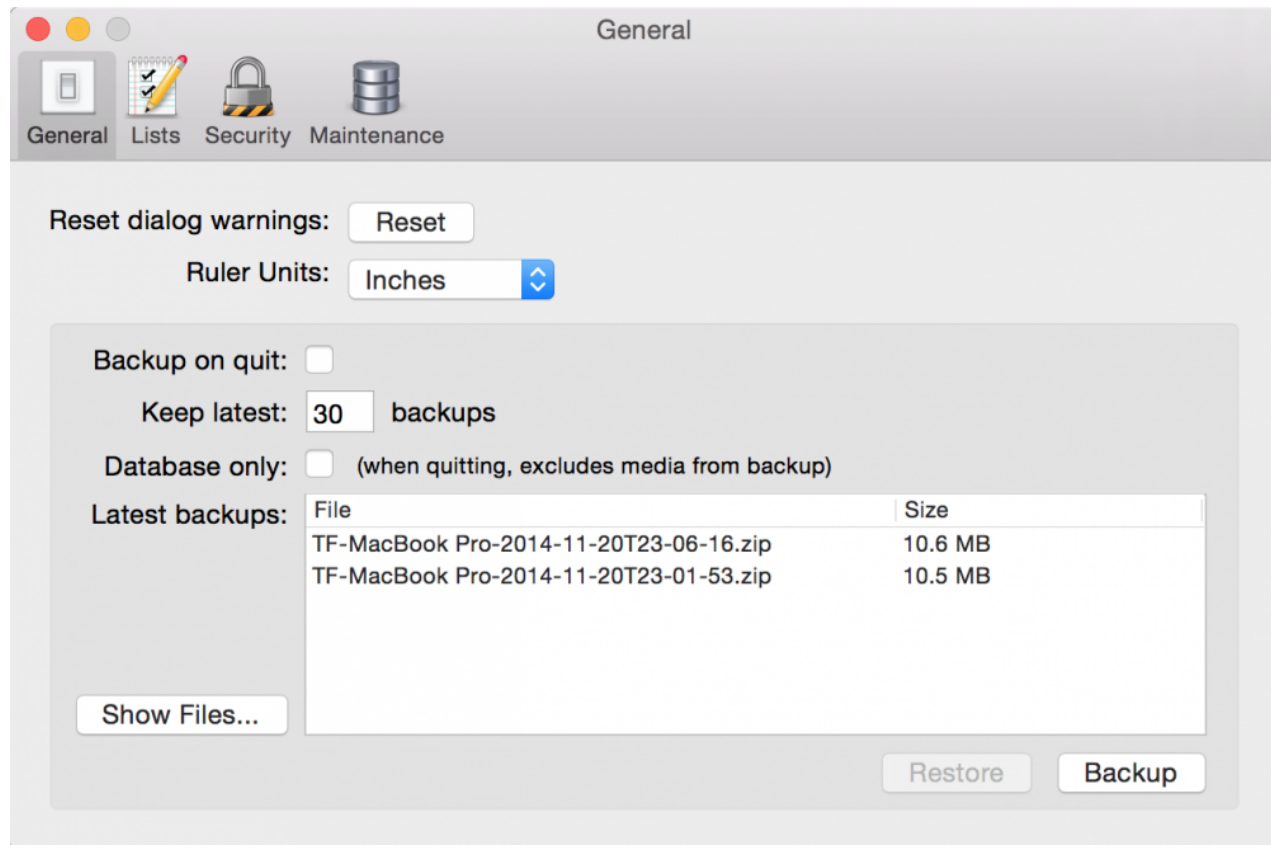
1. General
2. Lists
3. Security
4. Maintenance

## General

There are 3 functions to perform on the General preferences panel:

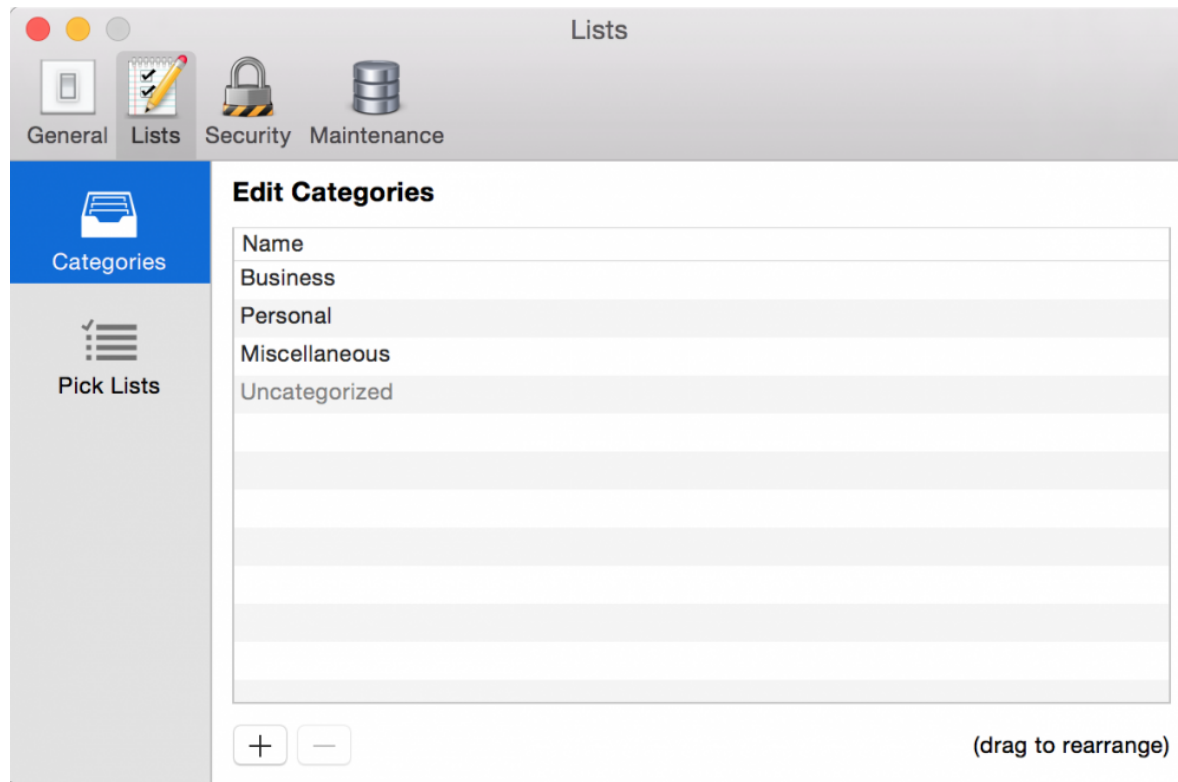
1. Reset dialogue warnings. If you suppress warnings on any of the dialogues you may want to see them again, so click this button.
2. Ruler Units. This is for the units displayed in the ruler on the Layout Designer view.
3. Backup & Restore. You can tell Tap Forms to backup when you quit the app, how many backups to maintain, and whether or not media files will be stored in your backup file. You can also perform a backup or restore a backup file. The Show Files button will also show you the backup files on your drive.





## Lists

This is where you configure your Categories and Pick Lists. See the separate [Categories](#) and [Pick Lists](#) topics for more on these.



## Security

This is where you set an encryption key, encrypt the database, set the auto-lock option and set a lockout interval..



If you enable iCloud sync, you will need to come here and set the encryption key. It must match the encryption key you set on all the other devices you've registered with iCloud sync. If you don't have the encryption key set, you will most likely receive a **Synchronization Failed** error message telling you to set the encryption key.



**Auto Lock** tells Tap Forms to lock Tap Forms if you haven't used it after a set number of minutes that you can configure.

If you've already set the encryption key, you can change it here by clicking on the **Change Encryption Key** button.

To encrypt the entire database, click on the **Encrypt Database** button. If your database is already encrypted, you can decrypt it by clicking on the **Decrypt Database** button.



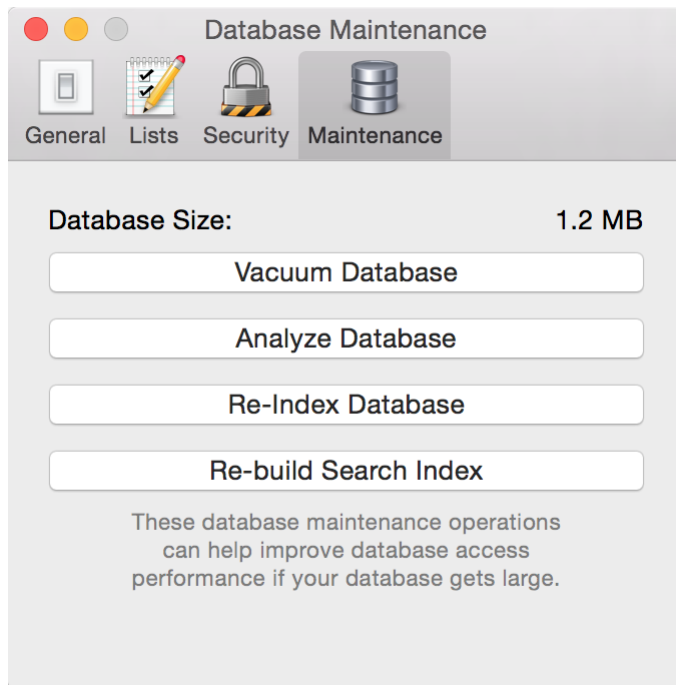
If you've forgotten your encryption key, launch the **Keychain Access** application on your Mac, search for Tap Forms, then double-click on the Tap Forms application password entry. Next, click on the **Show password** checkbox button. You'll be asked to enter your computer's password then you'll see your encryption key displayed. The Keychain Access application can be found by typing **Keychain Access** into the Spotlight search field or by launching it from the Utilities folder (which is inside your Applications folder) in the Finder.



If you've forgotten your encryption key and you don't see it in the Keychain Access application, there's no way to recover your data. So make sure you never forget your encryption key or you have a copy of it stored in another secure location.

## Maintenance

Tap Forms uses the SQLite database engine for storing its data. There are various maintenance tasks which can compact the database file and re-index the content helping to improve the performance of the application.



The Maintenance screen is where you can perform the following database maintenance tasks:

1. **Vacuum Database.** When you add forms and records to Tap Forms, the database file size will increase. You would naturally think that if you deleted data, the size of the database file would decrease. However, that's not the case. When you delete data, the space used is simply marked as available for new data. If you add a lot of data and then delete a lot of data, the file size can grow to be quite large. If you do that enough, the database file size will much larger than it needs to be. Vacuuming the database will compact it and give you a much smaller file. Smaller files also help to increase the performance.
2. **Analyze Database.** SQLite maintains statistical information about the data stored in the database which can help it to improve the performance of queries. If it takes too long to retrieve some records in a form, running the Analyze Database process may help to improve the performance of this.
3. **Re-index Database.** This command will tell SQLite to regenerate all the indexes in the database. It may help to improve performance in some situations.
4. **Re-build Search Index.** If you find that searching for specific values that you know are in your forms returns no results, trying clicking the Re-build Search Index button and that should fix it up.