

Check My Form

The Challenge

My users are constantly filling out forms the wrong way.

The Solution: Check My Form

Place a "Check My Form" Launcher on the form. When the user clicks it, it scans the form for fields that have mistakes and tells the user how to fix them.

Check My Form gives the user a self-service tool to check their forms for accuracy and completion which will improve your data accuracy while reducing user frustration. Fields on the form will be checked for compliance with rules you create, such as mandatory text field or valid date.

Set-up

The "Check My Form" solution is created with a Launcher that plays a SmartTip Set: Create SmartTips that will check for mistakes in the form.

- In the SmartTips App, add a set
- Create a rule to specify which page this set appears on. Define the page by URL.
- For each field in the form you would like to check, build a SmartTip with a validation rule and message Add a Launcher on the page that plays the Set.
- In Launcher Options, choose the Check My Form in the Action dropdown
- Select which SmartTip Set to play
- Customize the Launcher image with the text "Check My Form."

Technical Details

- Validation: Clicking the Check My Form Launcher plays the Validation SmartTips only, not Guidance. If the selected Set contains "Both" (Guidance and Validation together), only the Validation part will be activated.
- Segmentation: The Check My Form Launcher ignores the segmentation rules of the selected SmartTip Set; however, it will follow the rules created in the Set's Page rules. If you would like a Set of SmartTips only to play through Check My

Form, you will have to create a false segment for the Set.

Try it Out

Find a form that users often have difficulty with. Ask for some volunteers in your office to complete the form. Watch without giving guidance and see where users stumble and have the most difficulty. You'll be able to see what common errors people have. Also be sure to check what errors are generated by the system.

- Create a Set of Validation SmartTips on the problematic fields
- Create a new Launcher using the Check My Form action and choose your SmartTips set in the Set dropdown
- Enter Preview Mode, fill out the form with some errors, click the Launcher and see Check My Form in action!

Related Resources

- Learn how to use [SmartTips](#)
- Read more about adding [Launchers](#)