Case Info

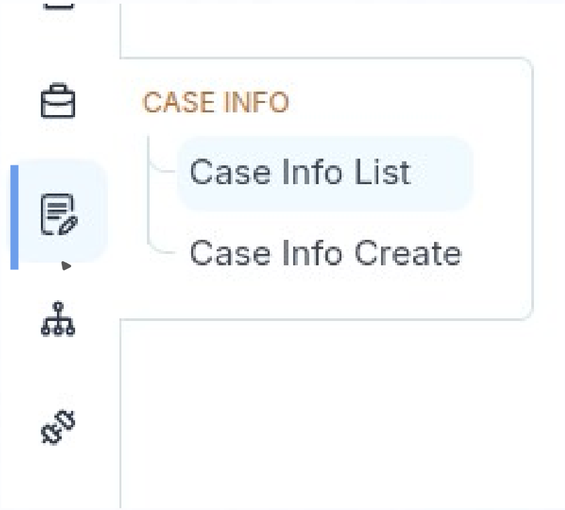
Hashmi Infonet User Guide

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Introduction- Case Info



Case Info

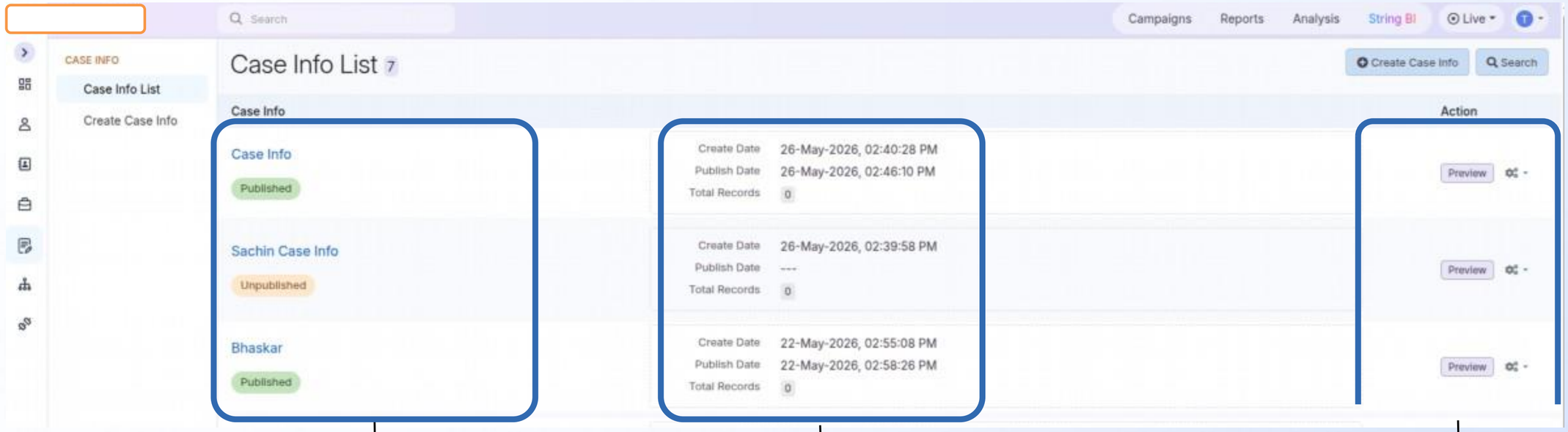
Case Info is a category that allows you to create different forms, which can be customized according to your team's requirements.

Clicking on this section in the sidebar reveals two options:

- **Case Info List** – View and manage existing case info forms
- **Case Info Create** – Create a new case info form

Case Info List

This section lists all the forms that have already been created.



Form Name – The name of the form, along with its status:
Published – The form is live and available on the platform
Unpublished – The form is still in draft and not yet available

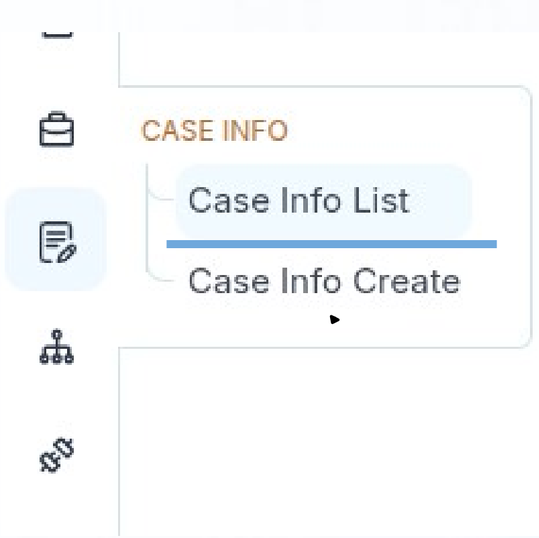
The 2nd section contain this-

- **Creation Date** – The date the form was created
- **Publish Date** – The date the form was published
- **Total Records** – The number of records submitted against the form

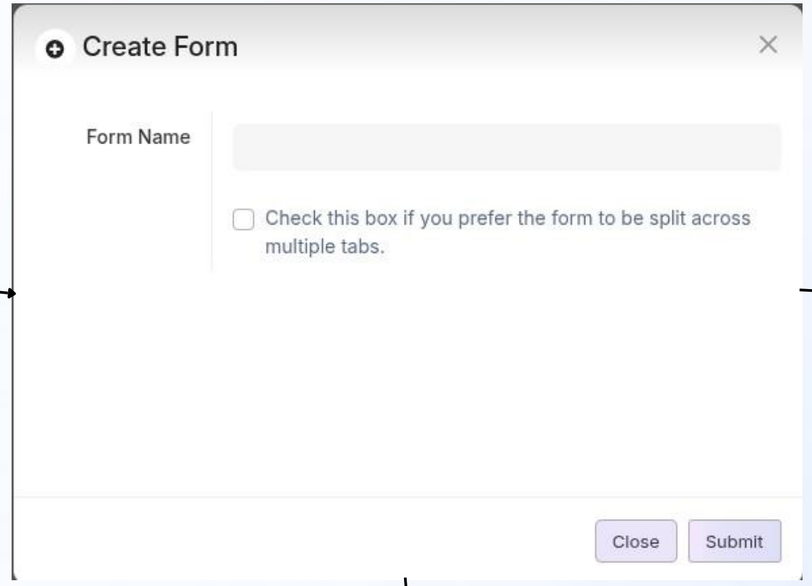
Action – Options to manage the form:
Preview – View the form as it appears to users
Settings – Access further options:

- **Edit** – Modify the form
- **Fill** – Fill out the form
- **Delete** – Remove the form

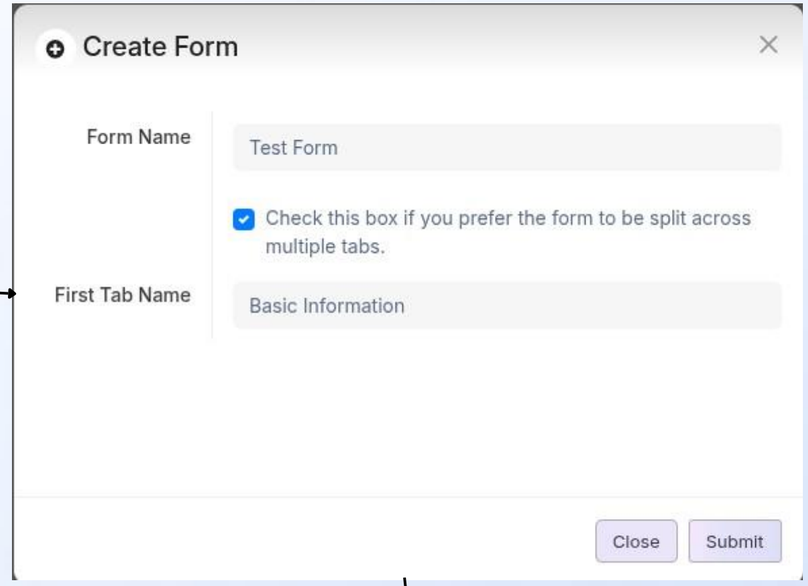
Case Info Create



Clicking on **Case Info Create** opens a new form creation screen.



The first field that appears asks you to enter the **Name** of the form.
Below this, a checkbox labeled **"Split form into multiple tabs"** is available. Enabling this option lets you break the form into multiple tabs- useful if you want to organize a long form into smaller, more manageable sections.



Once you've entered the form name and checked the checkbox, a new row will appear asking for the **First Tab Name**.
Make sure to fill in the name you want to appear as the first tab in the form. Then choose:

- **Submit** – to save and create the form
- **Close** – to exit without creating the form

Case Info Create

Add **New Tab** for specific details by clicking on the + sign given here.



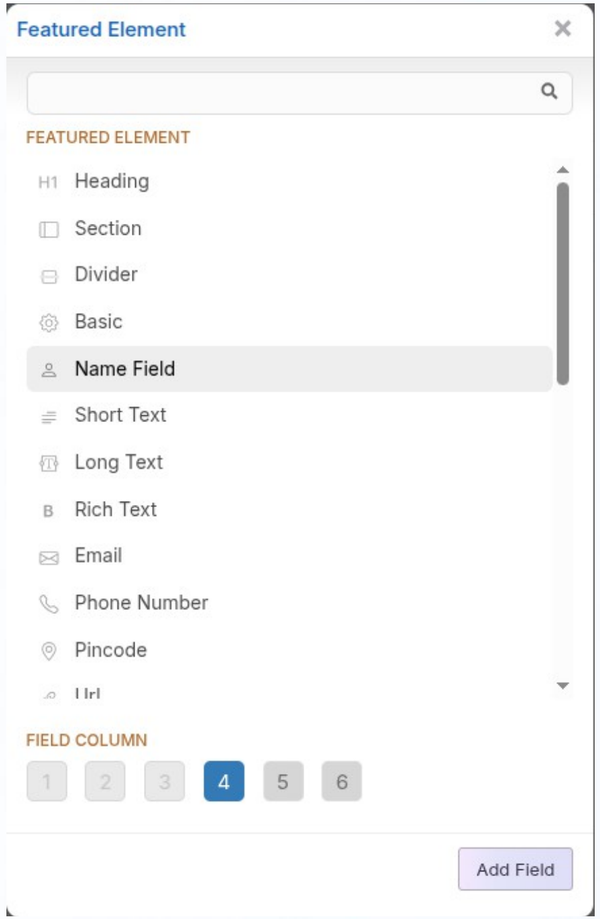
This tab name is the one you defined earlier while creating the form. If you want to change it, you can edit it using the **pencil icon** next to the name.

Within the tabs, there are **6 section slots** available, allowing you to add sections of your choice.
By default, a **primary section** is fixed for every form- this cannot be removed, but you can edit its name and use it as needed. Sections can also be resized to adjust the layout; for example, the first section shown here has been expanded to cover the space of 3 sections, you can place in one section as well according to the requirement.

Adding Elements and Featured Elements list



When you click on this + sign it will open into the featured element available on the platform, from there you can select the appropriate element for the particular tab. You can also select the field column in which you want to put the particular element.



Here is the list of featured elements-

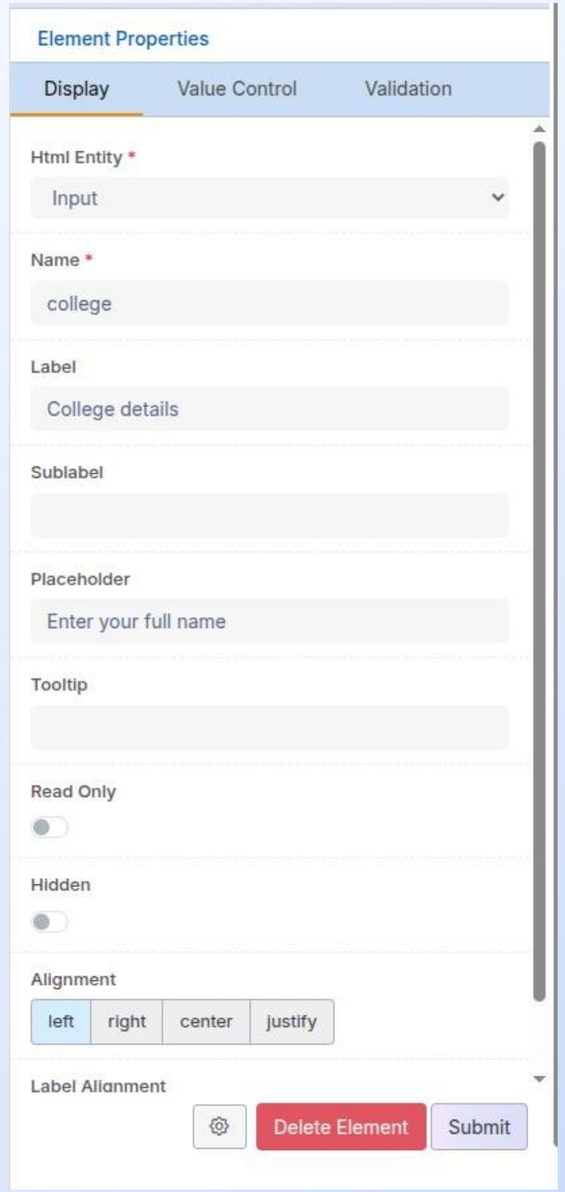
- Heading
- Section
- Divider
- Basic
- Name Field
- Short Text
- Long Text
- RIch Text
- Email
- Phone number
- PIncode
- Url
- Password

- Integer Number
- Decimal Number
- Range Slider(Integer)
- Range Slider (Decimal)
- Date
- Date & Time
- Dropdown (Single select)
- Dropdown (MUlti- select)
- Radio Group
- Checkbox Group
- Document Upload
- Image Upload
- Audio Upload
- Video Upload

Then select on the add field and the field will be added to the main form.

Elements Properties





When you click on an element, an **Element Properties** section appears in the right panel.
This panel has three tabs that remain consistent across all elements:

1. **Display** – Controls how the element appears (label, formatting, visibility, etc.)
2. **Value Control** – Manages the data/value associated with the element
3. **Validation** – Defines rules for what input is accepted (required fields, format checks, etc.)

While these three tabs stay the same across all element types, some elements may have **additional properties** specific to their function. Apart from these extra properties, the core structure remains consistent.

Elements Properties- Continued

Repurposing an Element

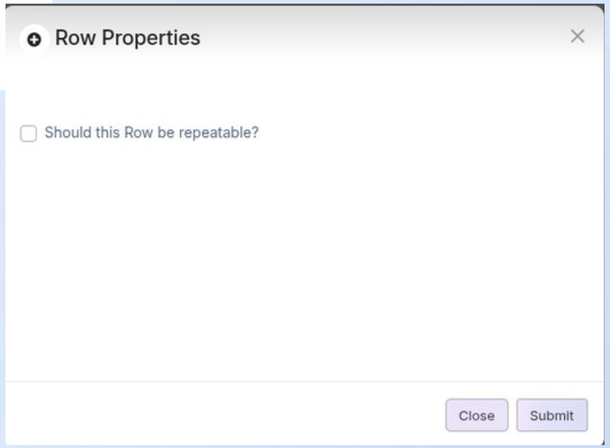
These properties let you customize an element to fit your specific need- even if it means using it differently than its default purpose.Example:
Suppose you drag in a "Name" element, but you actually need a field to capture **College/Education details**. Instead of adding a new element, you can:

- Rename the element's label (e.g., from "Name" to "College")
- Adjust its properties so it correctly represents and stores the education-related data
  This way, the same base element can be reused for a different field in your form/section.





Zoomed Version

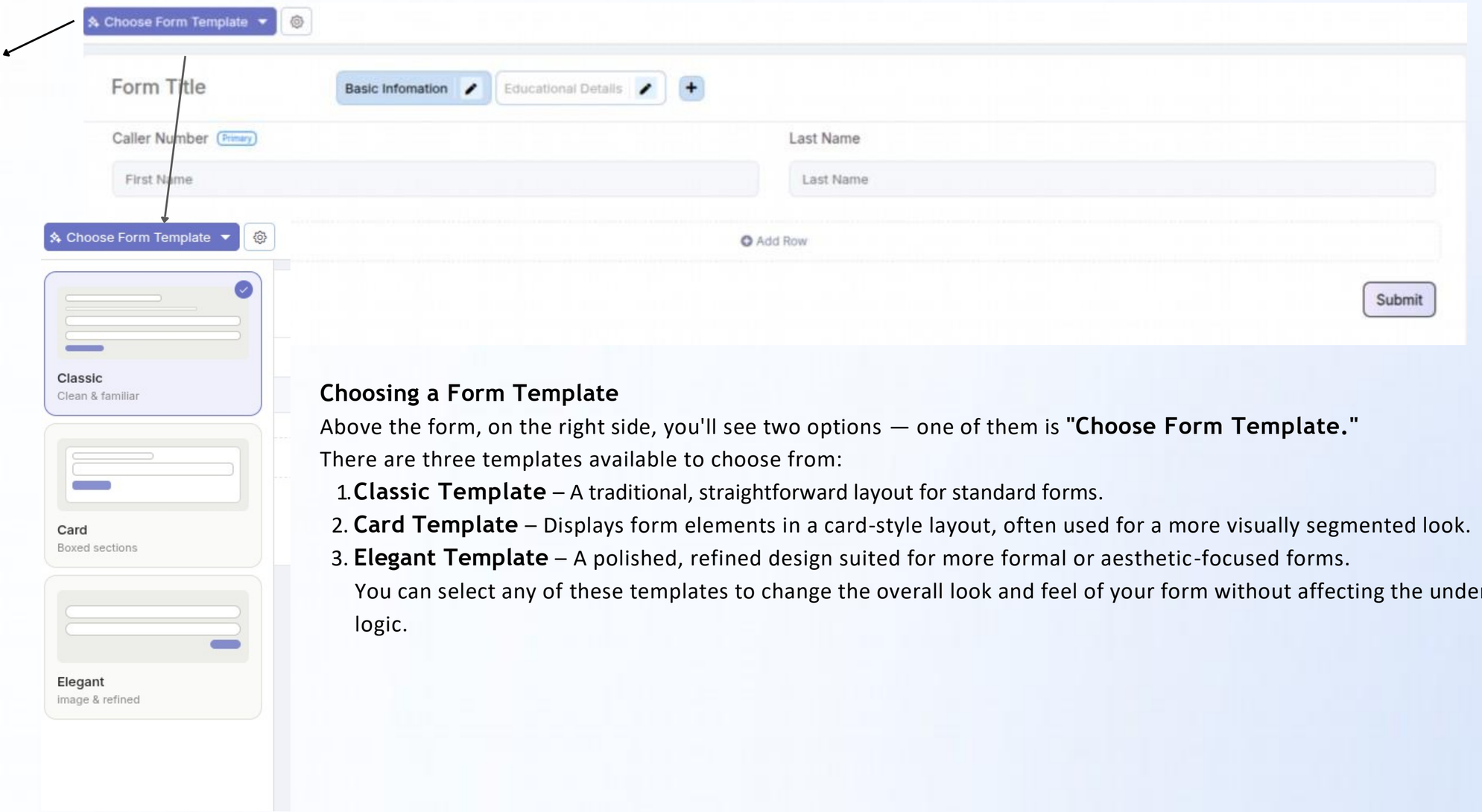


When you click the **gear icon,** a screen will appear showing the row properties. Here, you'll see the question "Should this row be repeatable?" Tick this option to allow the row to be duplicated. Once selected and submitted, the existing row can be duplicated and added multiple times as needed.

The second option is **grid of dots** which can be clicked and help rearrange the rows up or down in the form.

The third is **trash option**- allows you to delete the rows at any point whenever not needed.

Choose Form Template



Choosing a Form Template

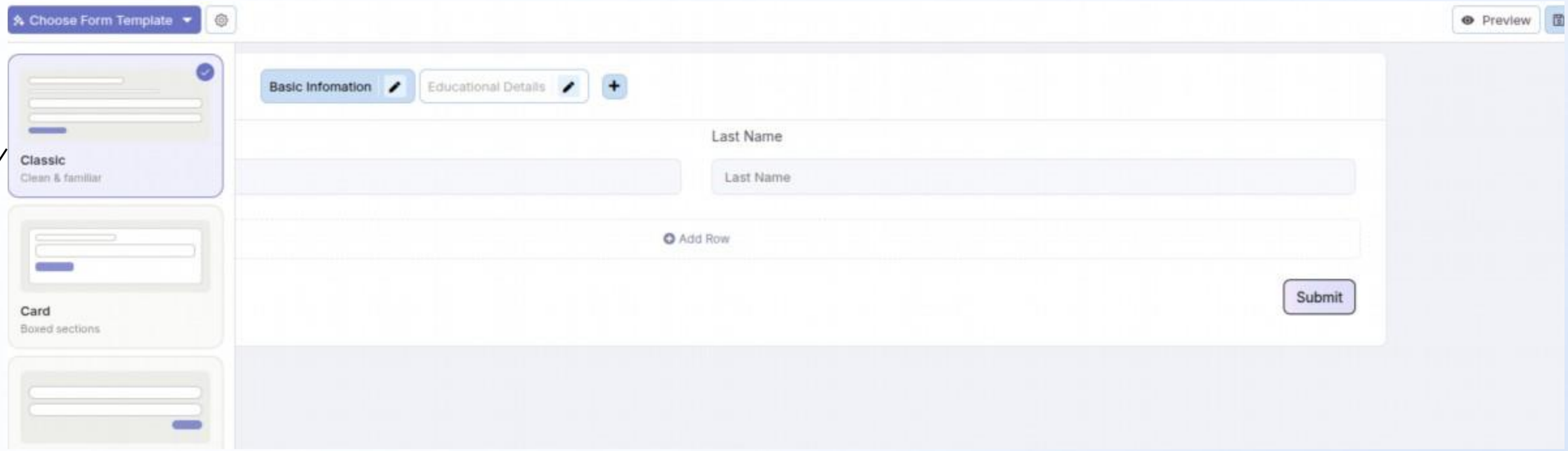
Above the form, on the right side, you'll see two options — one of them is **"Choose Form Template."**

There are three templates available to choose from:

1. **Classic Template** – A traditional, straightforward layout for standard forms.
2. **Card Template** – Displays form elements in a card-style layout, often used for a more visually segmented look.
3. **Elegant Template** – A polished, refined design suited for more formal or aesthetic-focused forms.

   You can select any of these templates to change the overall look and feel of your form without affecting the underlying data or logic.

Classic Template



Classic Template

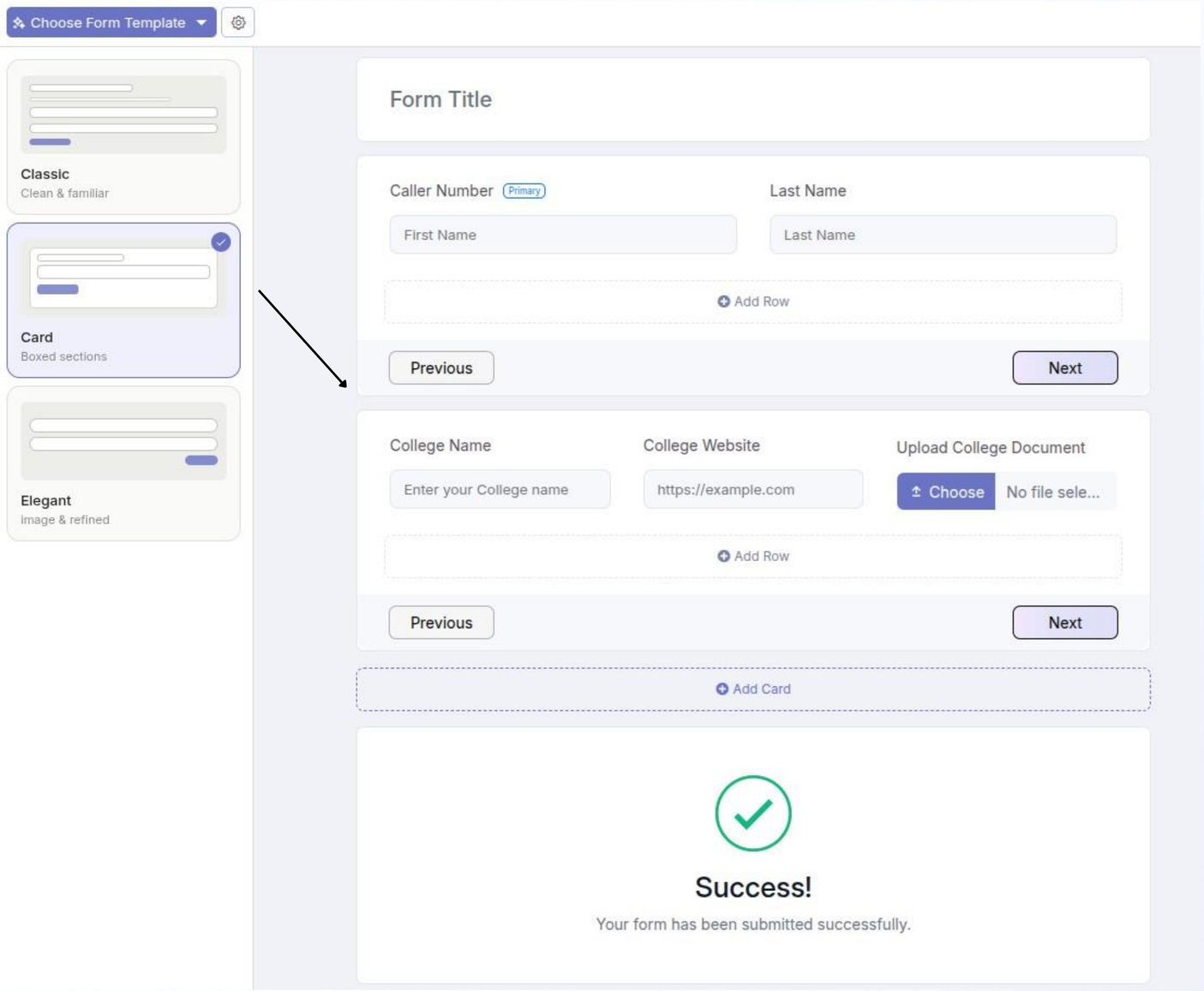
When you select the **Classic Template**, the form appears in its default layout — no visual changes are applied.

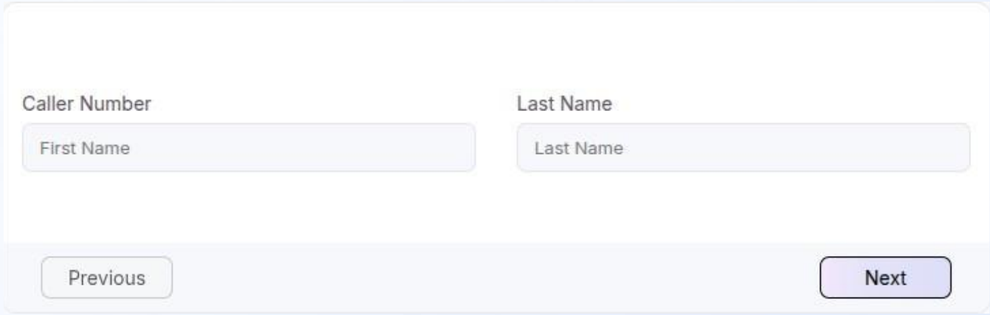
Different **tabs** are shown at the top of the form. You can:

- Click on a particular tab to navigate to that section
- Fill in the required information under each tab accordingly

  This template is useful when you want a simple, no-frills form structure organized by tabs, without any additional styling or card-based segmentation.

Card Template



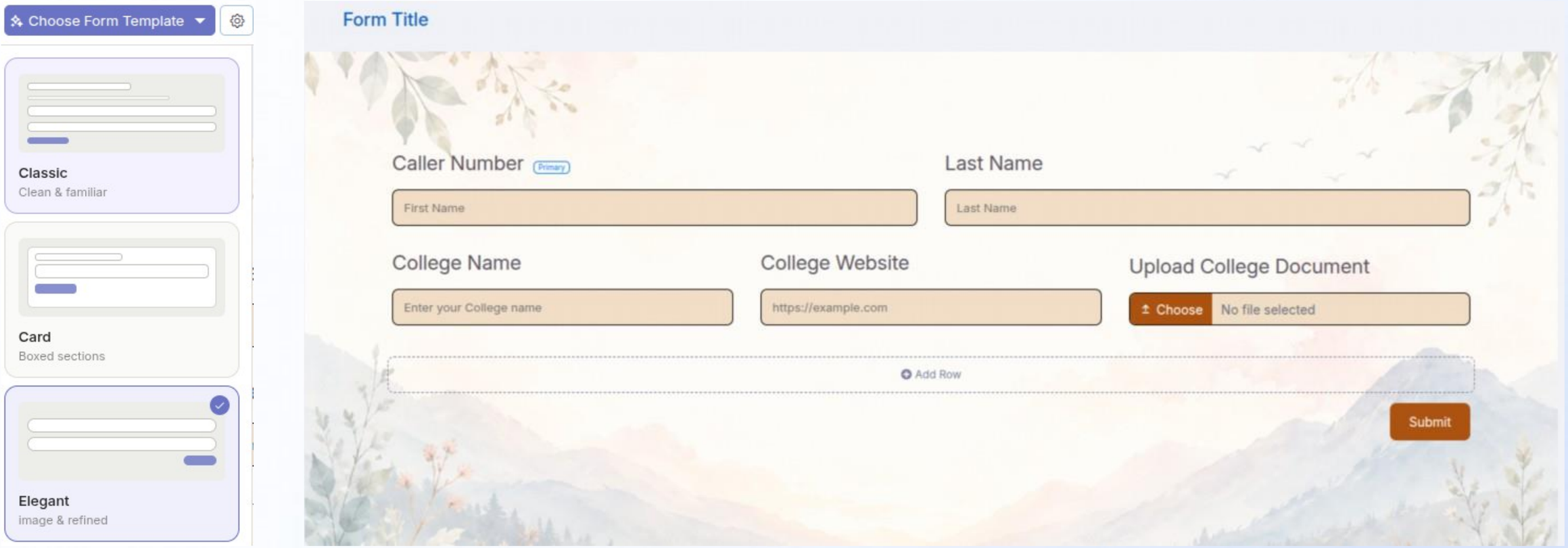


Card Template

When you select the **Card Template**, the design of the form changes to a step-by-step, card-based layout:

- You fill in **one section (card)** at a time.
- At the **bottom right** of the form, a **"Next"** option appears to move forward.
- Unlike the Classic Template, **no tabs are visible** at the top of the form — so you **cannot jump directly** to a specific section.
- Navigation is **linear**: you must click **"Next"** to proceed to the following section, one step at a time.
- At the **end of the form**, a **Submit** button appears to complete and submit the form.
  This template is ideal for guiding users through a form sequentially, ensuring information is filled in a specific order without skipping ahead.

Elegant Template



When you select the **Elegant Template**, the form takes on a more visually rich design:

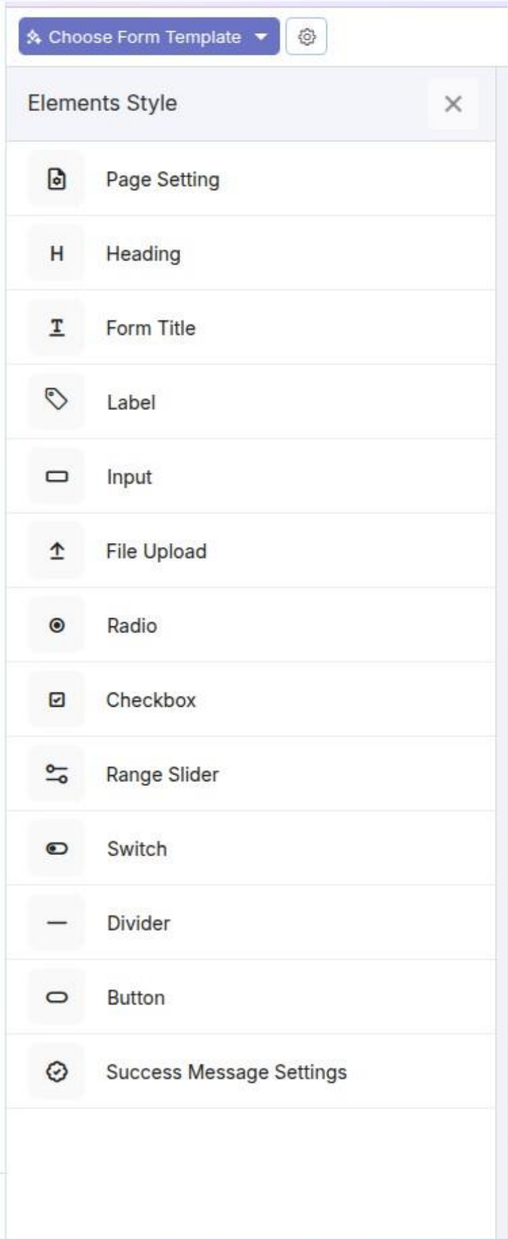
- A **colorful background** with an **image** is included by default.
- You can **customize the background color** as well as the **color of individual elements** on the page.
- The **background image can be replaced**, allowing you to match the form's theme with your **company branding** (logo colors, imagery, style, etc.).
  This template is best suited for forms where visual branding and aesthetic presentation are a priority — such as client-facing forms, marketing sign-ups, or company-branded surveys.

Elements Style

Next to "Choose Form Template," selecting the **gear icon** opens the **Element Style** options. This panel lets you style each element type individually, controlling settings like formatting, appearance, and behavior for various components on the form.

Each element type has its own **list of setting parameters**, tailored to what that element needs. The available elements you can style include:

1. **Page Setting** – Overall settings for the page/form container
2. **Heading** – Styling for headings used within the form
3. **Form Title** – Settings specific to the form's title
4. **Label** – Styling for field labels
5. **Input** – Settings for input fields
6. **File Upload** – Styling/behavior settings for file upload elements
7. **Radio** – Settings for radio button elements
8. **Checkbox** – Settings for checkbox elements
9. **Range Slider** – Settings for slider-style input elements
10. **Switch** – Settings for toggle/switch elements
11. **Divider** – Styling for divider/separator lines
12. **Button** – Settings for buttons (e.g., Submit, Next)
13. **Success Message Settings** – Settings for the message shown after successful form submission



Page Setting

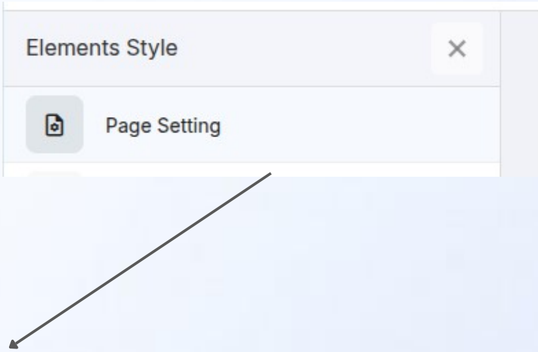
When you click on the **Page Setting** option under Element Style, a side panel appears with the following configuration options:

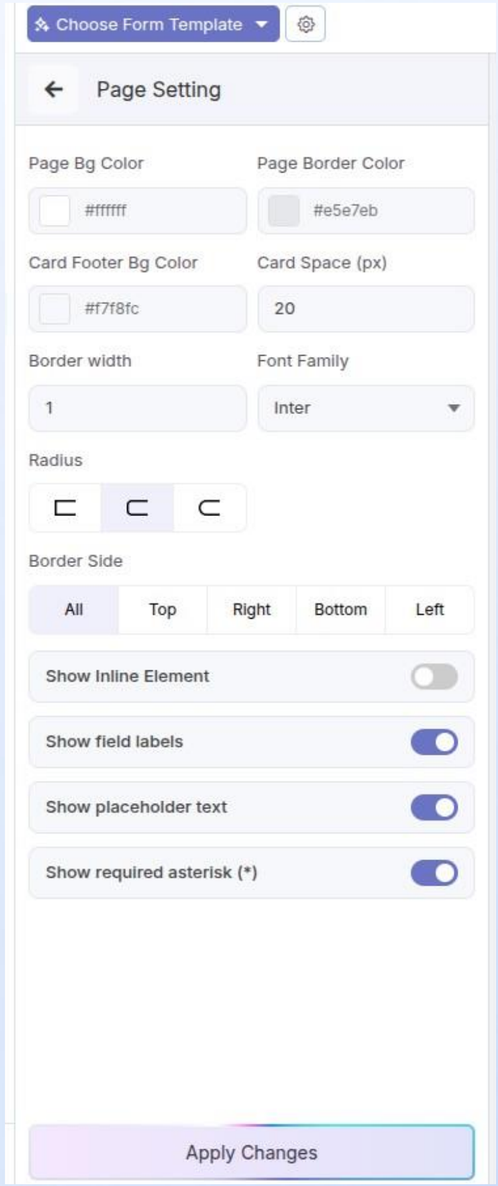
Style Options:

1. **Page BG Color** – Sets the background color of the page
2. **Page Border Color** – Sets the border color of the page
3. **Card Footer BG Color** – Sets the background color of the card footer area
4. **Card Space (px)** – Controls the spacing (padding/margin) around the card, measured in pixels
5. **Border Width** – Controls the thickness of the border
6. **Font Family** – Sets the font style used across the page
7. **Radius** – Controls the corner roundness (border-radius) of elements
8. **Border Side** – Specifies which side(s) of the element the border applies to

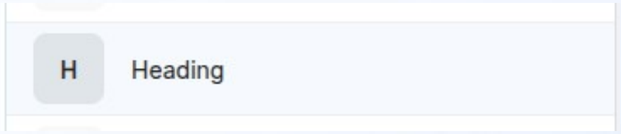
Toggle Options:

9. **Show Inline Element** – Toggles whether elements are displayed inline
10. **Show Field Labels** – Toggles visibility of field labels
11. **Show Placeholder Text** – Toggles visibility of placeholder text inside fields
12. **Show Required Asterisk (*)** – Toggles visibility of the asterisk (*) indicating required fields





Heading Setting

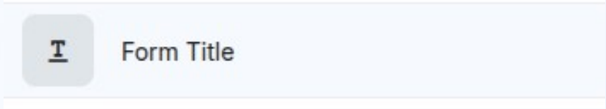


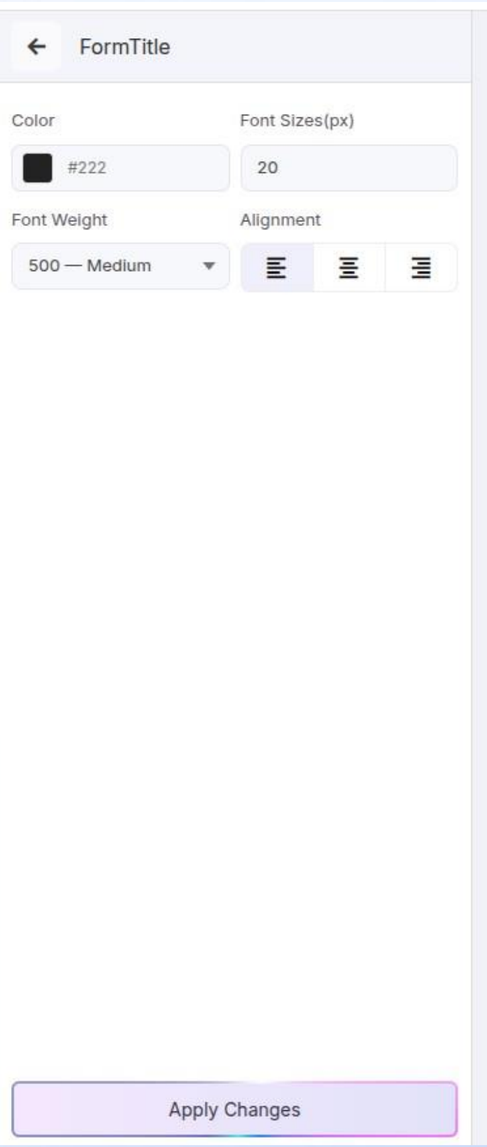


When you click on the **Heading** option under Element Style, you'll get settings to customize the appearance of headings within the form:

1. **Color** – Sets the color of the heading text
2. **Font Size (px)** – Controls the size of the heading text, measured in pixels
3. **Font Weight** – Controls the thickness/boldness of the heading text (e.g., normal, bold)
4. **Alignment** – Sets the text alignment of the heading (e.g., left, center, right)

Form Title Setting





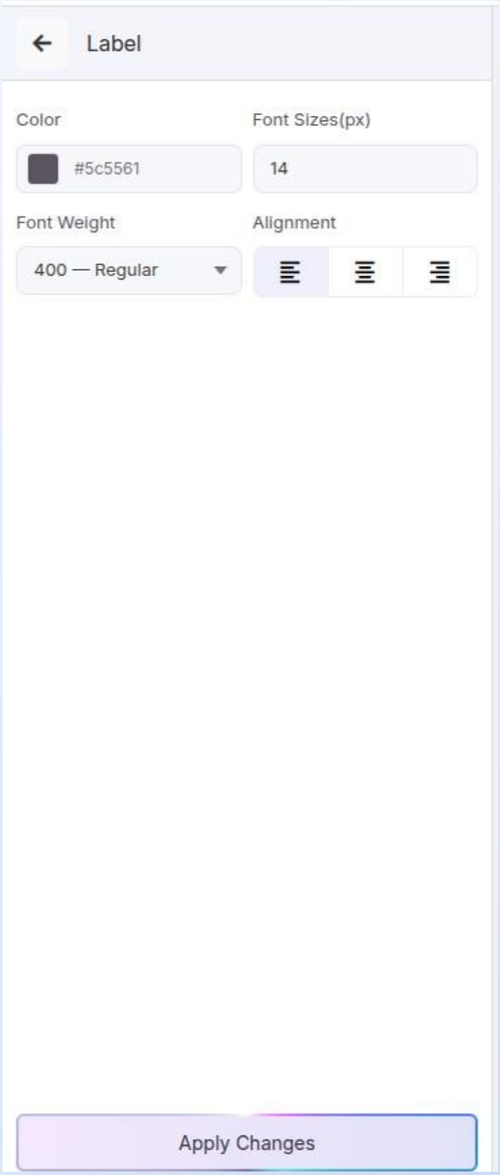
Form Title

When you click on the **Form Title** option under Element Style, you can configure settings for this element:

1. **Form Title** – The text field to set/edit the actual title of the form
2. **Color** – Sets the color of the form title text
3. **Font Size (px)** – Controls the size of the form title text, measured in pixels
4. **Font Weight** – Controls the thickness/boldness of the form title text (e.g., normal, bold)
5. **Alignment** – Sets the text alignment of the form title (e.g., left, center, right)

Label Setting



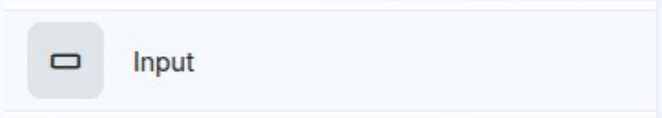


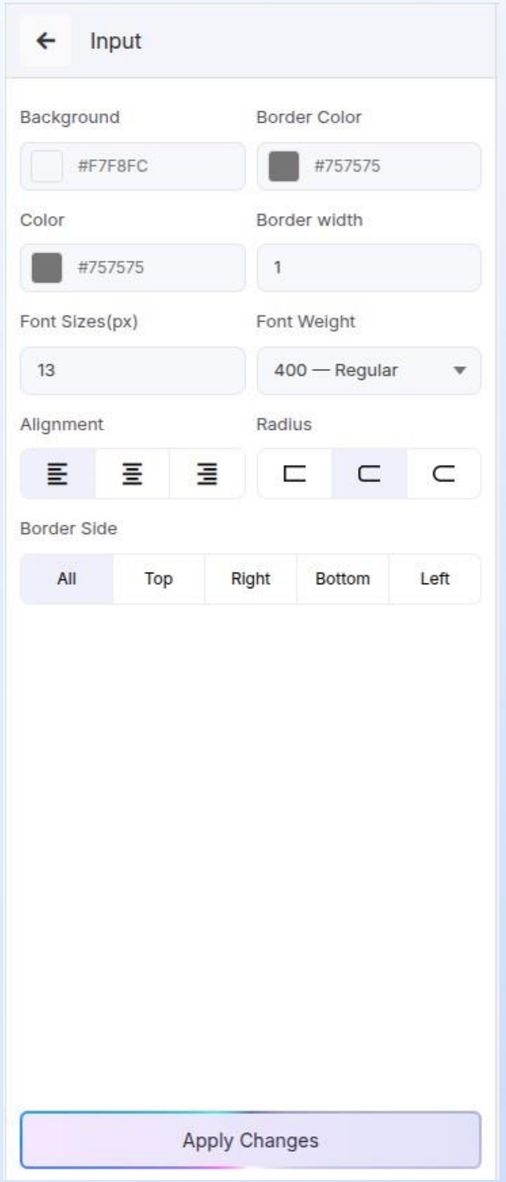
Label

When you click on the **Label** option under Element Style, you'll get settings to customize field labels:

1. **Color** – Sets the color of the label text
2. **Font Size (px)** – Controls the size of the label text, measured in pixels
3. **Font Weight** – Controls the thickness/boldness of the label text (e.g., normal, bold)
4. **Alignment** – Sets the text alignment of the label (e.g., left, center, right)

Input Setting



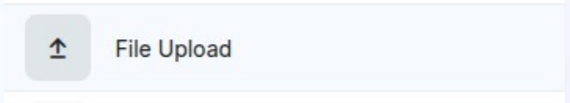


Input

When you click on the **Input** option under Element Style, you can change the design settings for input fields:

1. **Background** – Sets the background color of the input field
2. **Border Color** – Sets the color of the input field's border
3. **Color** – Sets the color of the text inside the input field
4. **Border Width** – Controls the thickness of the input field's border
5. **Font Size (px)** – Controls the size of the text inside the input field, measured in pixels
6. **Font Weight** – Controls the thickness/boldness of the text inside the input field
7. **Alignment** – Sets the text alignment inside the input field (e.g., left, center, right)
8. **Radius** – Controls the corner roundness (border-radius) of the input field
9. **Border Side** – Specifies which side(s) of the input field the border applies to

File Upload Setting



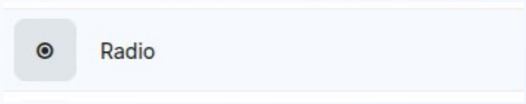


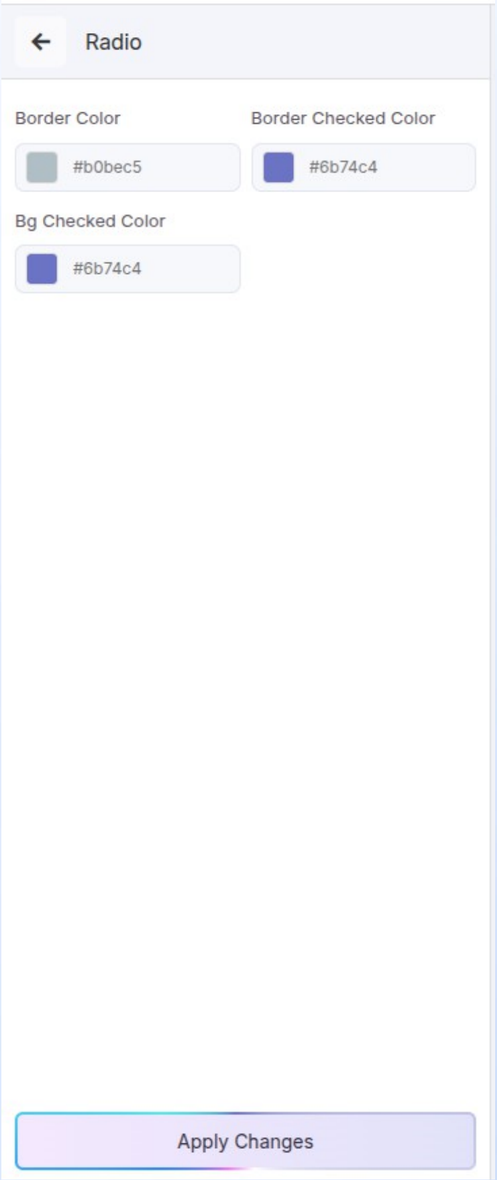
File Upload

When you click on the **File Upload** option under Element Style, you can configure the following settings:

1. **Active BG** – Sets the background color of the file upload area when active (e.g., during drag/hover/focus state)
2. **Active Color** – Sets the text/icon color when the file upload area is active
3. **Background Color** – Sets the default background color of the file upload area
4. **Border Color** – Sets the color of the file upload area's border
5. **Border Width** – Controls the thickness of the border
6. **Font Size (px)** – Controls the size of the text within the file upload element, measured in pixels
7. **Font Weight** – Controls the thickness/boldness of the text
8. **Radius** – Controls the corner roundness (border-radius) of the file upload box

Radio Setting



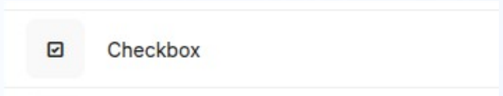


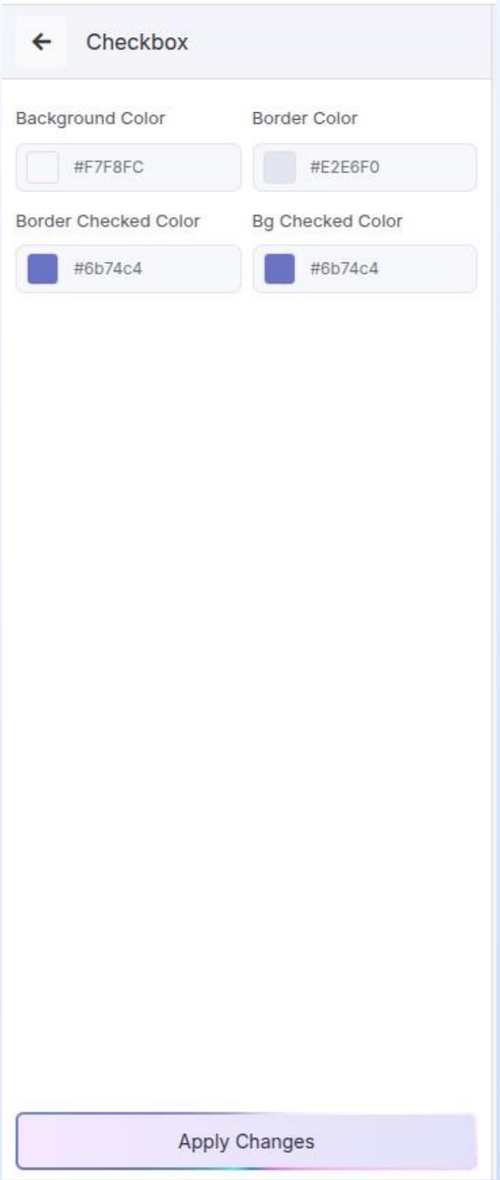
Radio

When you click on the **Radio** option under Element Style, you can configure the following settings:

1. **Border Color** – Sets the border color of the radio button in its default (unselected) state
2. **Border Checked Color** – Sets the border color of the radio button when it is selected/checked
3. **BG Checked Color** – Sets the background color of the radio button when it is selected/checked

Checkbox Setting



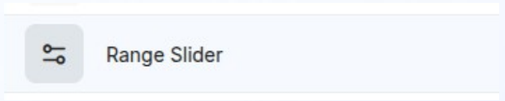


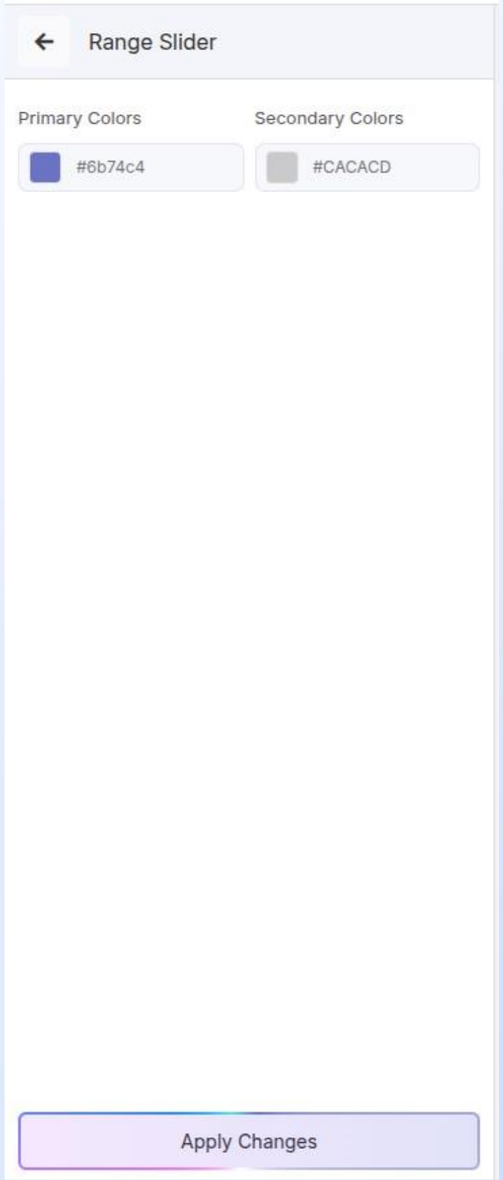
Checkbox

When you click on the **Checkbox** option under Element Style, you can configure the following settings:

1. **Background Color** – Sets the background color of the checkbox in its default (unchecked) state
2. **Border Color** – Sets the border color of the checkbox in its default (unchecked) state
3. **Border Checked Color** – Sets the border color of the checkbox when it is checked
4. **BG Checked Color** – Sets the background color of the checkbox when it is checked

Range Slider Setting



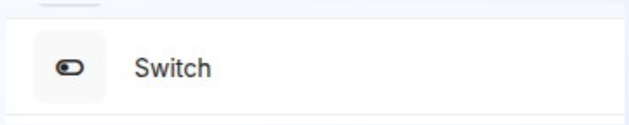


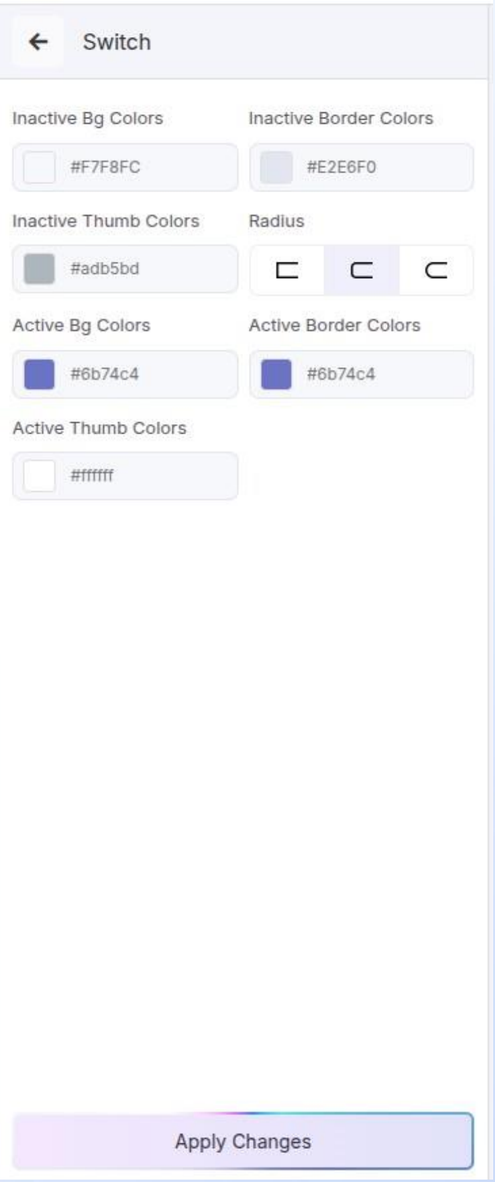
Range Slider

When you click on the **Range Slider** option under Element Style, you can configure the following settings:

1. **Primary Color** – Sets the primary color of the slider (typically the filled/active portion of the track and/or the handle)
2. **Secondary Color** – Sets the secondary color of the slider (typically the unfilled/inactive portion of the track)

Switch Setting



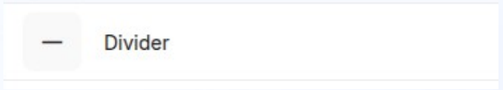


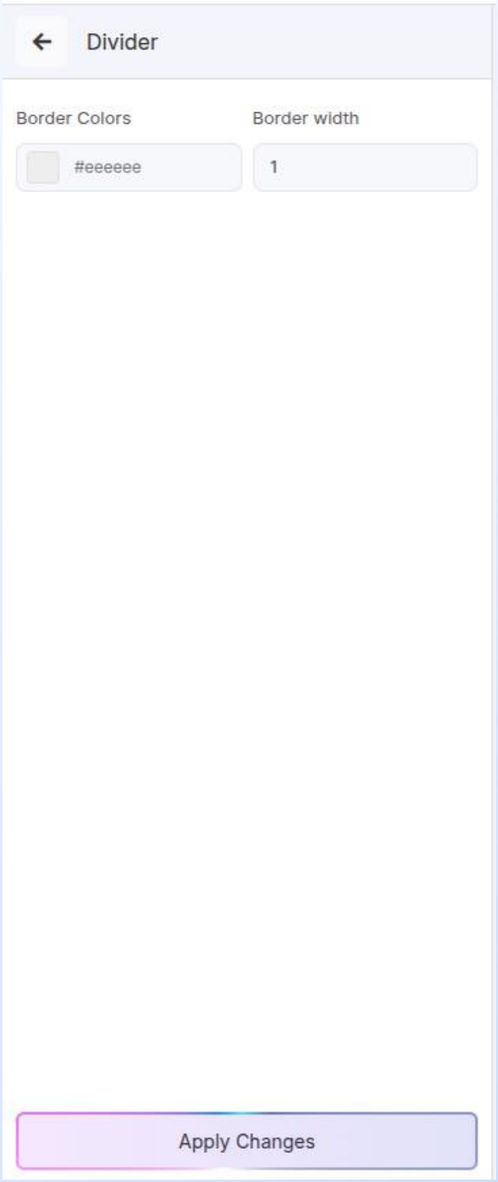
Switch

When you click on the **Switch** option under Element Style, you can configure the following settings:

1. **Inactive BG Color** – Sets the background color of the switch when it is in the inactive (off) state
2. **Inactive Border Color** – Sets the border color of the switch when it is in the inactive (off) state
3. **Inactive Thumb Color** – Sets the color of the thumb (toggle circle) when the switch is in the inactive (off) state
4. **Radius** – Controls the corner roundness (border-radius) of the switch
5. **Active BG Color** – Sets the background color of the switch when it is in the active (on) state
6. **Active Border Color** – Sets the border color of the switch when it is in the active (on) state
7. **Active Thumb Color** – Sets the color of the thumb (the toggle circle) when the switch is in the active (on) state

Divider Setting



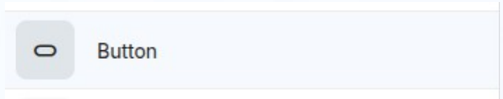


Divider

When you click on the **Divider** option under Element Style, you can configure the following settings:

1. **Border Color** – Sets the color of the divider line
2. **Border Width** – Controls the thickness of the divider line

Button Setting

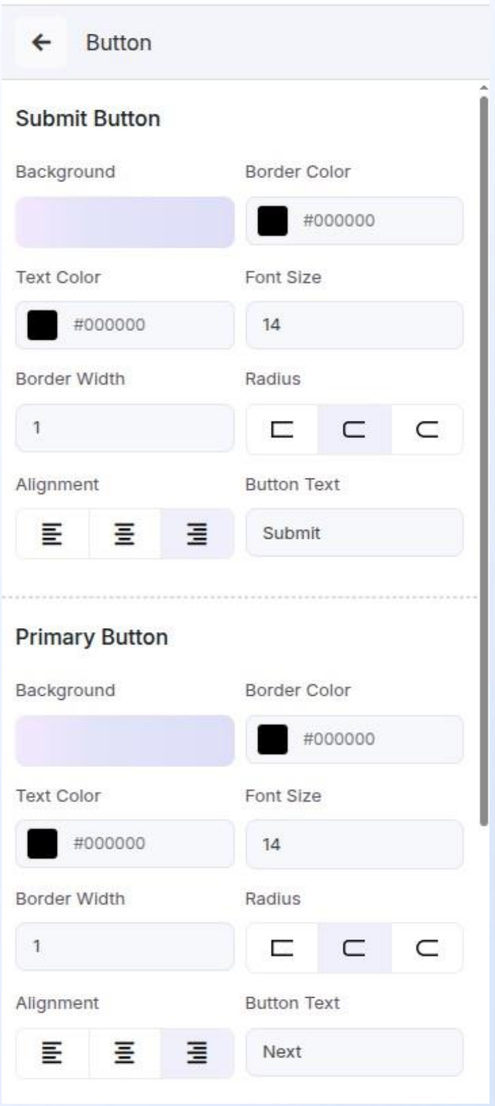


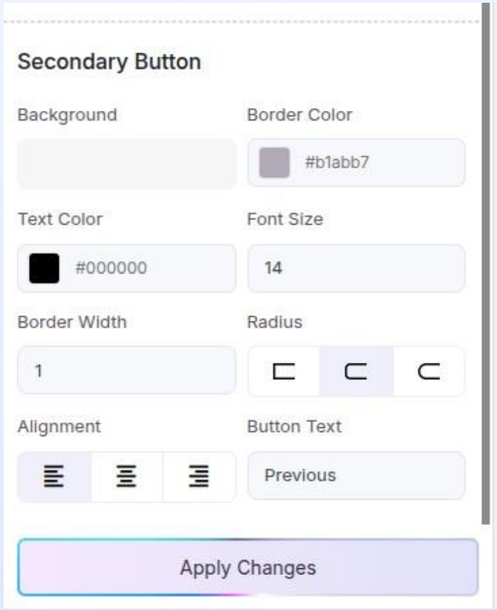
Button

When you click on the **Button** option under Element Style, settings are divided into **three button types**, each with its own set of configurable options:

1. Submit Button

- **Background** – Sets the background color of the submit button
- **Border Color** – Sets the border color of the submit button
- **Text Color** – Sets the color of the button text
- **Font Size** – Controls the size of the button text
- **Border Width** – Controls the thickness of the button border
- **Radius** – Controls the corner roundness (border-radius) of the button
- **Alignment** – Sets the positioning/alignment of the button (e.g., left, center, right)
- **Button Text** – Sets/edits the text displayed on the button (e.g., "Submit")





Button Setting-continued

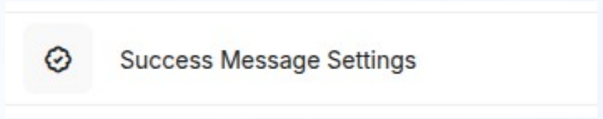
2. Primary Button

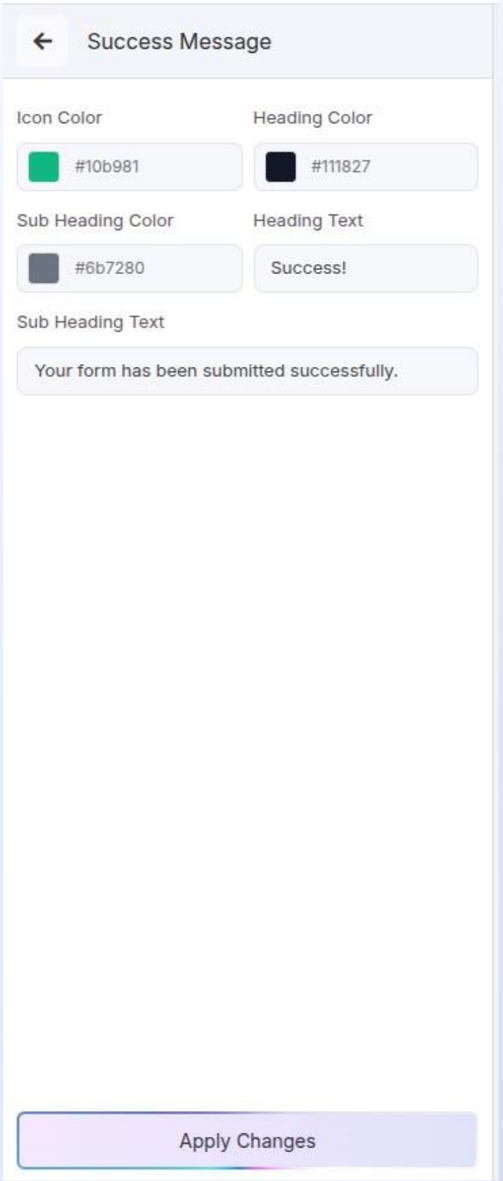
- **Background** – Sets the background color of the primary button
- **Border Color** – Sets the border color of the primary button
- **Text Color** – Sets the color of the button text
- **Font Size** – Controls the size of the button text
- **Border Width** – Controls the thickness of the button border
- **Radius** – Controls the corner roundness (border-radius) of the button
- **Alignment** – Sets the positioning/alignment of the button
- **Button Text** – Sets/edits the text displayed on the button (e.g., "Next")

3. Secondary Button

- **Background** – Sets the background color of the secondary button
- **Border Color** – Sets the border color of the secondary button
- **Text Color** – Sets the color of the button text
- **Font Size** – Controls the size of the button text
- **Border Width** – Controls the thickness of the button border
- **Radius** – Controls the corner roundness (border-radius) of the button
- **Alignment** – Sets the positioning/alignment of the button
- **Button Text** – Sets/edits the text displayed on the button (e.g., "Back" or "Previous")

Success Message Setting





Success Message Settings

The **Success Message** is the final message shown to the user after successful form submission. The settings available for this are:

1. **Icon Color** – Sets the color of the icon displayed in the success message (e.g., a checkmark icon)
2. **Heading Color** – Sets the color of the main heading text
3. **Sub Heading Color** – Sets the color of the sub-heading text
4. **Heading Text** – Sets/edits the main heading text (e.g., "Success!" or "Form Submitted")
5. **Sub Heading Text** – Sets/edits the sub-heading text (e.g., "Thank you for your submission")

Advanced Options

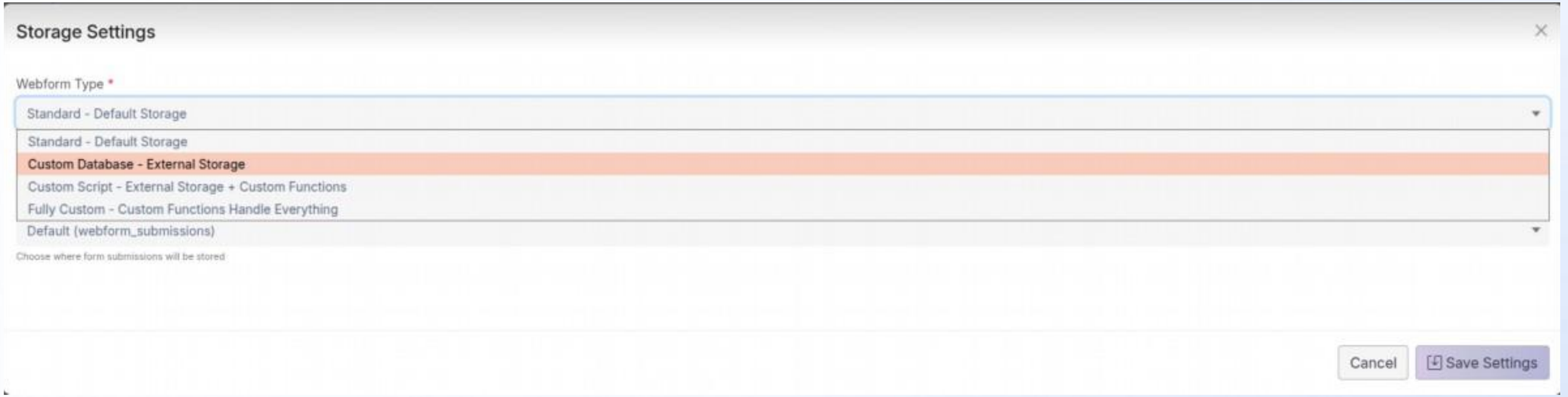


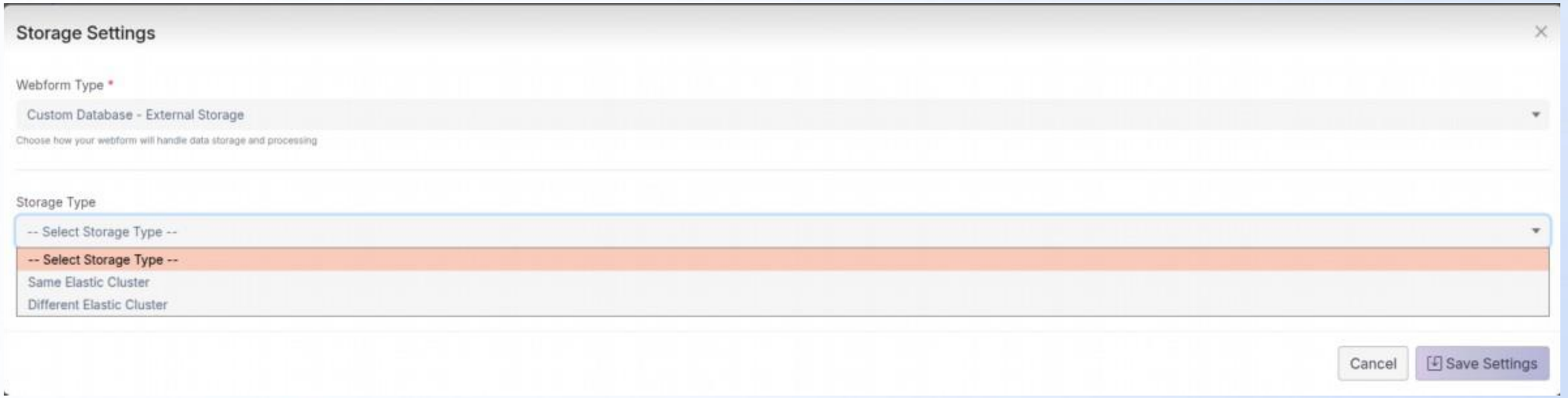
Top Right Buttons (Form Actions)

There are several buttons present on the top right side of the form:

1. **Preview** – Allows you to preview the form as it would appear to an end user, before publishing.
2. **Save** – Saves the current progress/state of the form being built.
3. **Storage** – Controls where form submission data is stored.
    - **By default**, when a form is submitted, the data is saved on the **same server** where the form was created/built.
    - **Apart from this default option**, other storage options are also available. The client can **change the storage destination** as per their preference in the **Storage Settings**.
4. **Publish** – Publishes the form, making it live and accessible (e.g., via a link or embed) for actual use/submissions.

Storage Settings





Storage Settings- Custom Database- External

Storage

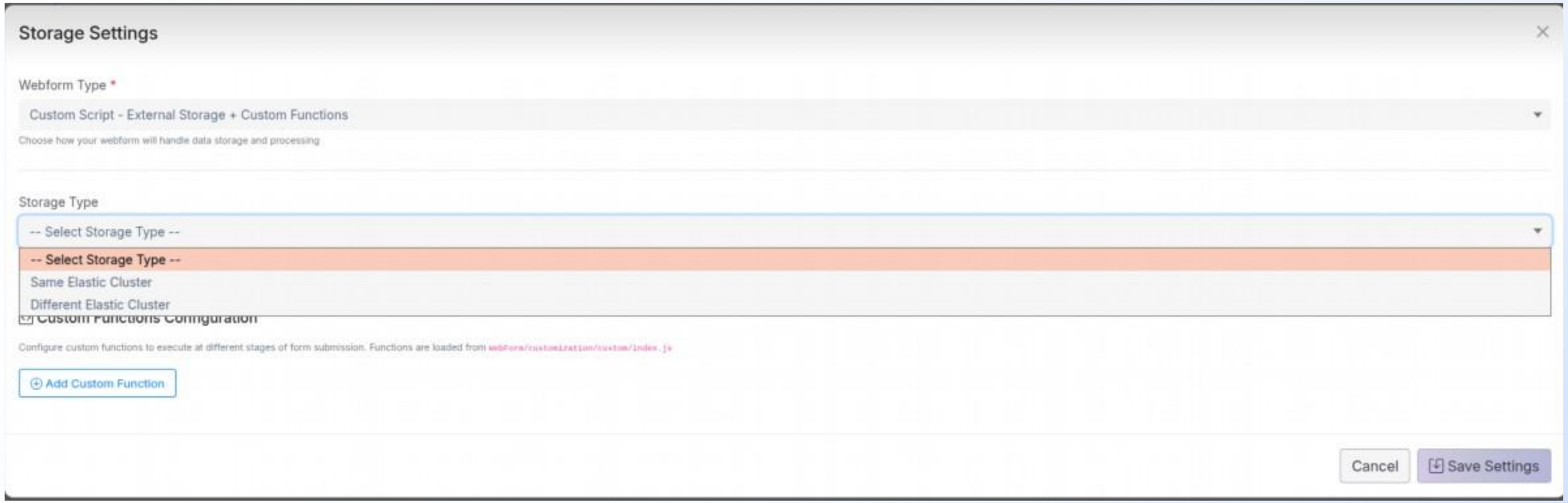
Controls where form submission data is stored.

- **By default**, when a form is submitted, the data is saved on the **same server** where the form was created/built.
- **Apart from this default option**, other storage options are also available. The client can **change the storage destination** as per their preference in the **Storage Settings**.

Storage Settings

1. **Web Form Type**
    - **Custom** – Allows form submission data to be stored **externally**, on a **personal/specific database** as required by the client, instead of the default server.
2. **Select Storage Type**
    - **Same Elastic Cluster** – Stores the form data on the **same Elastic cluster** currently being used (i.e., the default one).
    - **Different Elastic Cluster** – Allows the client to store form data on a **separate/different Elastic cluster**, as per their preference or infrastructure requirements.

Storage Settings- Custom Script - External Storage+Custom Functions

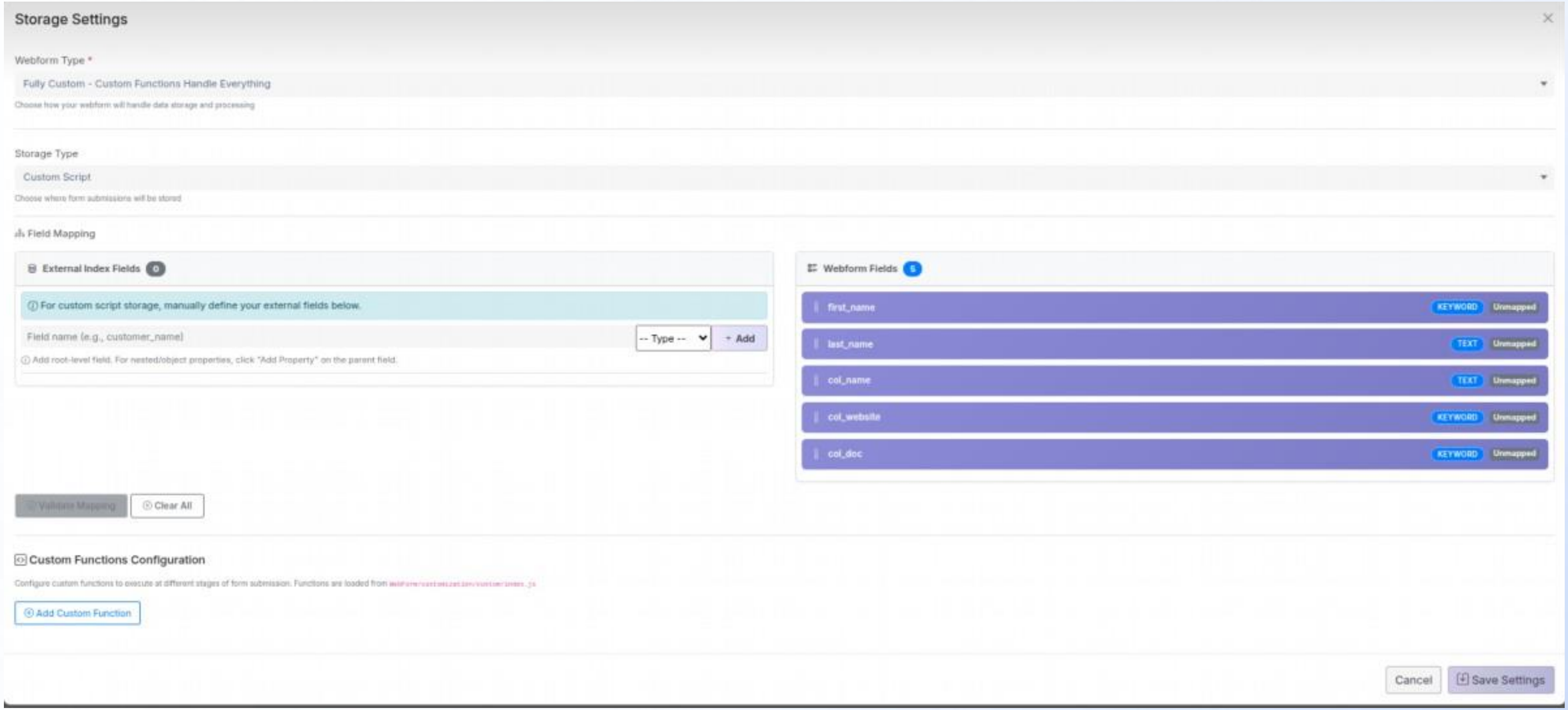


Custom Script (Settings - Developer Related)

Under Settings, there is a **Custom Script** option intended for **developer-related** customizations.

- This allows **additional/add-on functionality** to be implemented on the form, beyond the standard built-in options.
- The client can instruct their **developer** to write custom code/scripts here to make specific changes or add functionality **as per their requirements**.

Storage Settings- Fully Custom



Fully Custom

- This option means the form/functionality is **entirely custom-built by the client's own developer**, with nothing tied to the platform's default system.
- The platform provides the base, but the **implementation and logic are fully controlled externally** by the client's team.

Field Mapping

- Supports **1 to many** mapping- meaning **one field** can be mapped to **multiple fields/destinations** (e.g., one form field's data being sent to or associated with several places).

Custom Function Configuration

- Allows the client to configure **their own custom functions**, based on the **data they are inputting/putting in**.
- This gives flexibility to define specific logic or processing based on custom data requirements.

Responses

- (Section noted- further details to be added)

Filters

- Filters are dependent on **indexing**.
- **Important:** While creating the form, **indexing must be turned ON**; otherwise, **filters will not be available/functional**.