Mercury Beta: Help for Builders

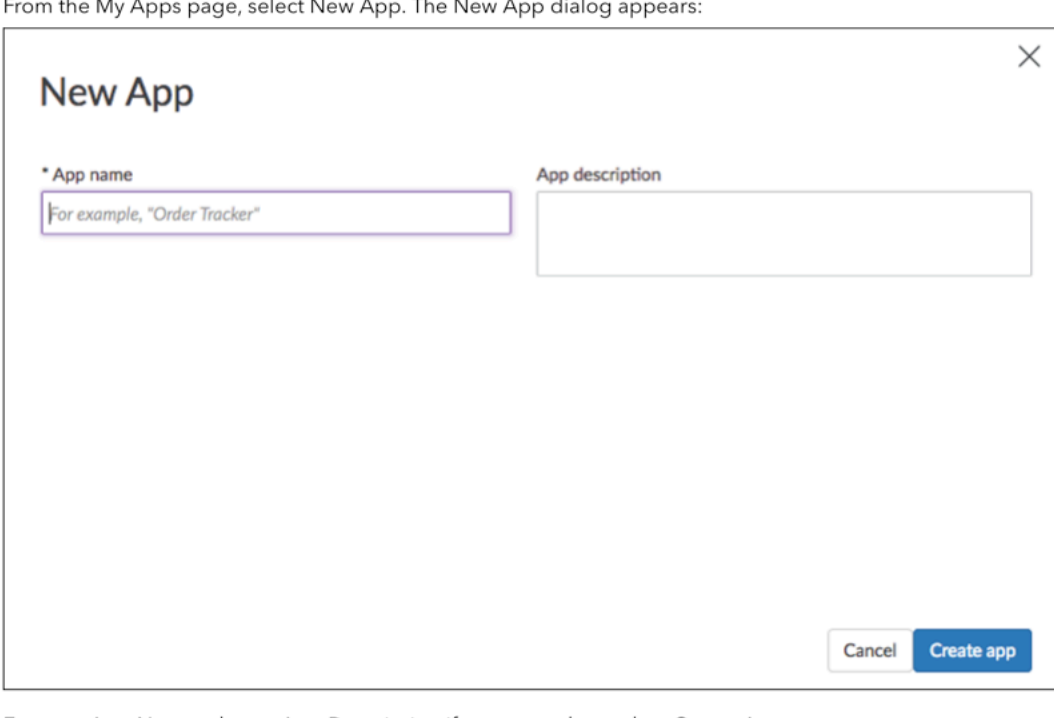
Welcome to the beta program for Mercury. We're glad you're here!

Here's the help for building and modifying an app in the Mercury Beta. The sections below explain all the things you can currently do to create and change your app.

Create a new app

To create a new app:

1. From the My Apps page, select New App. The New App dialog appears:



2. Enter an App Name, plus an App Description if you want, then select Create App.

Create a table

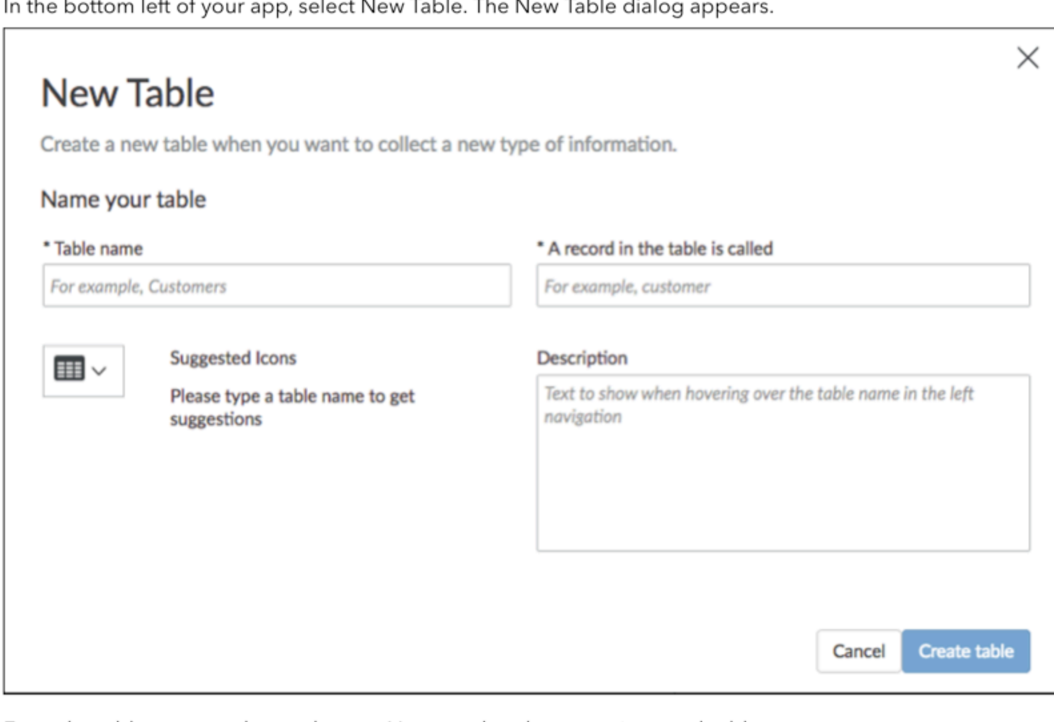
This section explains how to add a table to your app, including:

- Adding a new table
- Adding fields to the table and form

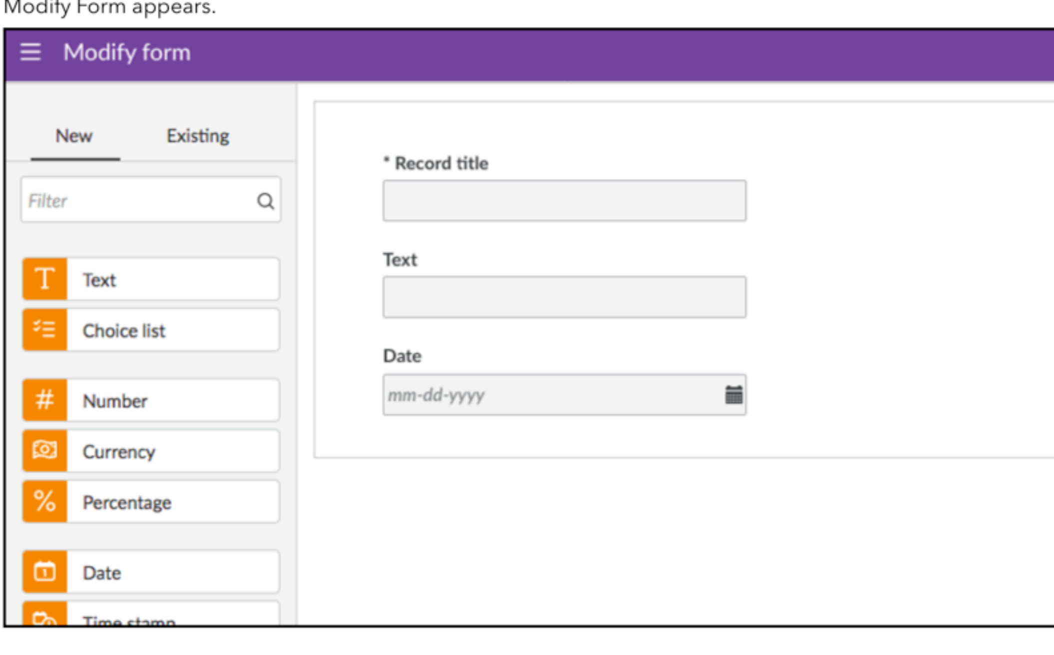
Adding a new table

Follow these steps to create a table in your app:

1. In the bottom left of your app, select New Table. The New Table dialog appears.



2. Enter the table name and record name. You can also choose an icon and add a description.
3. Select the Create Table button. A confirmation dialog appears letting you know your table is ready for you to add fields to collect information. Select the OK button. Modify Form appears.



Add fields to the table and form

You use the Modify Form page to add fields to the table and design the form for users to enter information. Each field you add to the form is a field in the table.

By default, a Record Title field appears on your form. This field is required, and each record value must be unique. You can edit the name of the field to something other than Record Title.

You can then add as many fields as needed. When creating your first table in an app, field types include:

Type	Users can...
Text	Enter text content
Choice list	Choose from a list
Number	Enter numbers without format
Currency	Enter numbers in a currency format
Percentage	Enter numbers in percentage format
Date	Enter a date
Time stamp	Enter a date and time
Time of day	Enter a time
Duration	Enter a length of time
Checkbox	Choose items from a checklist
User	Choose an app user from a list
URL	Enter a web page address
Email	Enter an email address
Phone	Enter a phone number

Keyboard shortcuts

While using Modify Form, you can use keyboard shortcuts to navigate.

Keyboard combination	Description
Windows: Ctrl+S Mac OS: Command+S	Save the form
Esc	While on the form, cancel With a field selected, deselect the field
Enter or Return	While on the New or Existing tab, add the selected field to the form While on the Form, select the field with focus
Shift+Arrow Up Shift+Arrow Down	With a field selected, move the field position on the form
Shift+Delete	With a field selected, remove the field from the form

Change table properties and settings

To change table properties and settings:

1. In your app, select the table you need to change, or select a report.
2. In the top navigation, select the settings icon. The Settings menu appears.
3. Select Table Properties & Settings. The Table Properties & Settings page appears.
4. You can change any or all of the following:
   - Table name
   - Record name
   - Icon
   - Description
5. To apply your changes, select the Apply button. If you want to cancel your changes, select Reset.

Delete a table

To delete a table:

1. In your app, select the table you need to change, or select a report.
2. In the top navigation, select the settings icon. The Settings menu appears.
3. Select Table Properties & Settings. The Table Properties & Settings page appears.
4. In the upper right of the page, select Delete Table. A confirmation dialog appears.
5. To confirm the deletion, type YES (in all capital letters) into the field, then select Delete Table.

Modify a form

To make changes to a form in your table:

1. Open any record in your app.
2. In the top navigation, select the settings icon. The Settings menu appears.
3. Select Modify This Form. Modify Form appears.
4. You can add or remove fields from the form in the same way as you did when you were creating the form originally. For details on how to use Modify Form and all the field types available, see the section above, Create a Table.

Link to another table

If your app has more than one table, you can modify the form to create links between tables so you can store and share information efficiently.

For example, if you are creating a maintenance request app for your apartment complex, you can store requests in one table and apartment building information in another table. When a maintenance request is started, the user can choose from a list of apartments, rather than manually entering information and storing it either repetitively or incorrectly.

To create a link between tables:

1. Select Get Another Record. The Get Another Record dialog appears.
2. Select the table you want, then select Add to Form. (Note that there is an optional advanced setting to choose a different association field if you want.)
3. The link appears on the form, so that users can select records from the other table while filling out the form in the app.

Modify a report

To make changes to an existing report:

1. Select a report. For steps on how to view a report, see the topic Using Reports.
2. In the top navigation, select the settings icon. The Settings menu appears.
3. Select Modify This Report. Modify Report appears.
4. On Modify Report, you can make changes to the report including:
   - Change the name
   - Add fields
   - Move columns
   - Hide columns (remove fields)
   - Sort and group
5. Select the Save button when you have finished making changes to your report. The sections below provide details on the types of changes you can make.

Change the name

At the top of Modify Report, the current name of the report appears. You can edit the report name here.

Add fields

On the left of Modify Report, a list of Hidden Fields appears. You can add any or all of these fields to your report by selecting them, one at a time. The field appears in the first column of the report.

Move columns

You can move the field columns on the report by dragging and dropping the column to the new position you want.

Hide columns (remove fields)

To hide a column, or in other words, remove a field from a report, select the down arrow icon on the column and select Hide This Column. The field appears on the list of Hidden Fields on the left.

Sort or group

You can sort or group a report by:

- Selecting the Sort & Group Icon
- Selecting the arrow on a report column

For details on how to sort and group a report, see the topic Sort or Group a Report.

Adding users

To add users to your app:

1. Select Users in the upper left. A list of all the users in the app appears.
2. In the upper right, select the plus icon. The Add Users dialog appears.
3. In the Select Users field, start entering a user name to search. Results appear as you type so you can select a user.
4. In the Assign Role field, choose the appropriate role for the user you are adding. The roles are explained in the table below.
5. Select Add. A confirmation dialog appears with options for sending the user an optional welcome message.
6. You can copy the app link, start an email, or both. When you are finished, click the X to close the dialog, or choose No Thanks.

Role	Description
Administrator	• Use the app • Add and edit records • Build and modify the app • Manage app users
Participant	• Use the app • Add and edit records
Viewer	Read information in the app
None	Cannot access the app

Removing users

To remove users from your app:

1. Select Users in the upper left. A list of all the users in the app appears.
2. Select one or more users you need to remove.
3. Select the remove icon at the top of the users list. A confirmation dialog appears.
4. Select Remove. A confirmation message appears that the user has been removed.