

Tap Forms 3 to Tap Forms 5



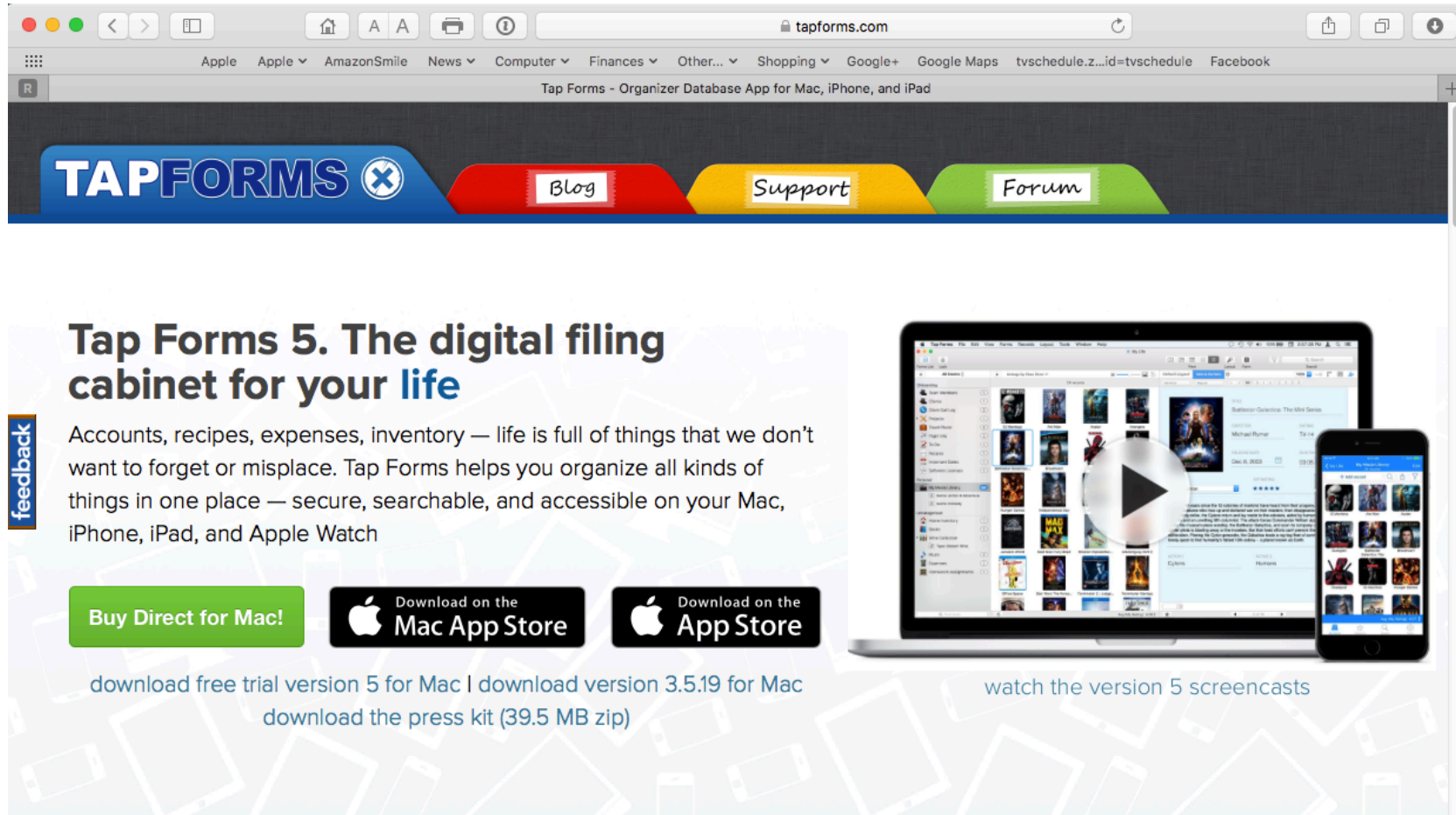
What is Tap Forms

- A database program than runs on your Mac, iPhone, iPod, iPad, and iWatch
- Can sync changes from one device to another
- Tap Forms 3 introduced in October 2014
 - Filemaker Inc. discontinued support of Bento in September of 2013
 - I did a MUG presentation on Tap Forms 2.2.2 in 2014
- Tap Forms 5 introduced in August 2016
- Tap Forms 5.1 introduced in April 2017
- Tap Forms for Mac and iOS available in App Store
 - Mac version costs \$49.99
 - Universal iOS version costs \$16.99


What's a DataBase

- A document with 1 or more forms (files)
- Each form has one or more records with the same layout
- Each form layout has one or more fields of various formats
 - Text
 - Number
 - Date
 - Time
 - Date & Time
 - Calculation
 - Checkmark
 - Contact
 - Email
 - File Attachment
 - Location
 - Note
 - Phone
 - Photo
 - Website
 - And others

Tap Forms Web Site



The image shows a browser window displaying the Tap Forms website. The browser's address bar shows the URL tapforms.com. The website's navigation bar includes the Tap Forms logo and three buttons: "Blog", "Support", and "Forum". The main content area features a large heading "Tap Forms 5. The digital filing cabinet for your life" and a sub-heading "Accounts, recipes, expenses, inventory — life is full of things that we don't want to forget or misplace. Tap Forms helps you organize all kinds of things in one place — secure, searchable, and accessible on your Mac, iPhone, iPad, and Apple Watch". Below this text are three buttons: "Buy Direct for Mac!", "Download on the Mac App Store", and "Download on the App Store". A video player is embedded on the right side of the page, showing a screenshot of the Tap Forms application interface on a laptop and a smartphone. The video player has a large play button in the center. Below the video player is a link that says "watch the version 5 screencasts".

TAPFORMS 

[Blog](#) [Support](#) [Forum](#)

Tap Forms 5. The digital filing cabinet for your life

Accounts, recipes, expenses, inventory — life is full of things that we don't want to forget or misplace. Tap Forms helps you organize all kinds of things in one place — secure, searchable, and accessible on your Mac, iPhone, iPad, and Apple Watch

[Buy Direct for Mac!](#) [Download on the Mac App Store](#) [Download on the App Store](#)

[download free trial version 5 for Mac](#) | [download version 3.5.19 for Mac](#)
[download the press kit \(39.5 MB zip\)](#)

[watch the version 5 screencasts](#)

Tap Forms Blog

The screenshot shows a web browser window displaying the Tap Forms Blog. The browser's address bar shows the URL "tapforms.com". The page features a navigation bar with the Tap Forms logo and three buttons: "Blog" (red), "Support" (yellow), and "Forum" (green). The main content area displays two blog posts. The first post is titled "Tap Forms 5.1 – Now with iCloud Sync!" and is dated April 28th, 2017. The second post is titled "Announcing Tap Forms Organizer 5 + Secure Database" and is dated August 2nd, 2016. On the right side of the page, there are several utility sections: a "Subscribe" button with a notification icon and the number "700", a "Blog Search" section with a search input field and a "Search" button, a "Search Forums" section with a search input field and a "Search" button, a "Blog Archives" section with a "Select Month" dropdown menu, and a "Forum Login" section with a "Log In - or - Register" button. A vertical "feedback" button is located on the left side of the page.

TAPFORMS [Blog](#) [Support](#) [Forum](#)

Tap Forms 5.1 – Now with iCloud Sync!

April 28th, 2017

Hey There, I'm happy to announce the immediate availability of Tap Forms 5.1! Tap Forms 5.1 has been in the works since I released Tap Forms 5.0. One of the most requested features was to bring back iCloud sync. So that's what I've done. Using Apple's CloudKit services, Tap Forms 5.1 now allows you to [...]

Posted in Uncategorized | 11 Comments »

Announcing Tap Forms Organizer 5 + Secure Database

August 2nd, 2016

Hey There, Many of you may already know about this since I sent out the promotional e-mail last night, but I've just announced the imminent availability of Tap Forms Mac and iOS version 5! On Thursday, August 4th, Tap Forms version 5 will become available for both Mac and now a universal version for iOS. [...]

[Subscribe](#) 700

Blog Search

Search Forums

Blog Archives

Blog Archives

Forum Login

[Log In - or - Register](#)

feedback

Tap Forms 5.1 Blog Details

Apple Apple AmazonSmile News Computer Finances Other... Shopping Google+ Google Maps tvschedule.z...id=tvschedule Facebook

Tap Forms 5.1 – Now with iCloud Sync! | Tap Forms Organizer

TAPFORMS Blog Support Forum

[← Announcing Tap Forms Organizer 5 + Secure Database](#)

Tap Forms 5.1 – Now with iCloud Sync!

Hey There,

I'm happy to announce the immediate availability of Tap Forms 5.1!

Tap Forms 5.1 has been in the works since I released Tap Forms 5.0. One of the most requested features was to bring back iCloud sync. So that's what I've done. Using Apple's CloudKit services, Tap Forms 5.1 now allows you to sync your documents between your devices using your iCloud account.

Tap Forms 5.1 is a free update for all Tap Forms 5.0 customers!

[Click Here to Watch the Tap Forms 5.1 Screencast Video](#)

New Stuff

- iCloud sync and Apache CouchDB sync support was added to the Sync Settings screen in addition to IBM Cloudant and Nearby sync.
- Greatly improved VoiceOver support.
- Touch Bar support for MacBook Pros.
- Import, Export, and Print Presets allow you to save and quickly retrieve different sets of settings.

feedback

Subscribe 700

Blog Search

Search

Search Forums

Search

Blog Archives

Blog Archives Select Month

Forum Login

Log In - or - Register

Tap Forms Support

The screenshot shows a browser window with the URL tapforms.com. The page features a navigation bar with 'Support' highlighted, and buttons for 'Blog', 'Support', and 'Forum'. A 'feedback' button is visible on the left. The main content area includes a 'For support issues, comments, or questions:' section with links to 'Tap Forms Screencast Videos' (Mac and iOS), 'ScreenCastsOnline Tap Forms (Mac)', and 'Contact' information (email, Twitter, Facebook). It also lists 'Mac version 3 manual' and 'Mac version 5 manual' with PDF download options, and an 'iPhone version manual (old)'. On the right, there are sections for 'Blog Search', 'Search Forums', 'Blog Archives' (with a 'Select Month' dropdown), and 'Forum Login' (with 'Log In - or - Register' button). A 'Subscribe' button with a '700' count is also present.

For support issues, comments, or questions:

Tap Forms Screencast Videos

1. [Tap Forms 5 Mac Screencasts](#)
2. [Tap Forms 5 iOS Screencasts](#)
3. [ScreenCastsOnline Tap Forms \(Mac\)](#)

Mac version 3 manual
(online and PDF download)

Mac version 5 manual
(online and PDF download)

iPhone version manual (old)

Contact

- ✉ support@tapforms.com
- 🐦 [@tapforms](#) (follow me)
- 📘 [tapforms](#) (like me)

Blog Search

Search Forums

Blog Archives

Blog Archives

Forum Login

[Log In - or - Register](#)

Subscribe 700






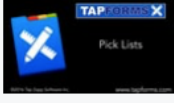
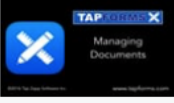



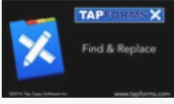




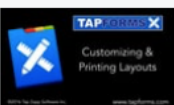

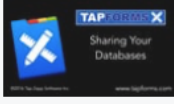
Frequently Asked Questions (version 5)

See the forum post here:

<https://www.tapforms.com/forums/topic/faq-about-the-tap-forms-5-upgrade/>

Frequently Asked Questions (version 3)

Tap Forms Videos

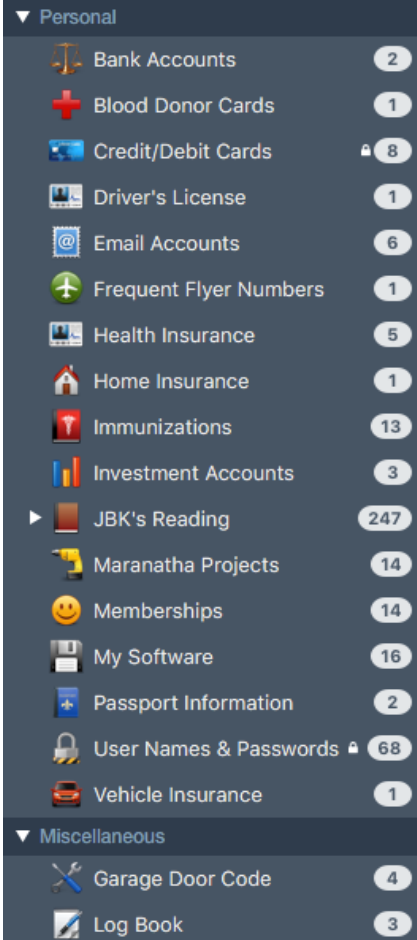
	Tap Forms 5.1 New Features from Tap Zapp Softwar...		Printing & Emailing Reports from Tap Zapp Softwar...		Setting up Sync from Tap Zapp Softwar...
	The Tap Forms 5 Tools tab from Tap Zapp Softwar...		Creating and Printing Labels from Tap Zapp Softwar...		Pick Lists from Tap Zapp Softwar...
	Managing Multiple Documents from Tap Zapp Softwar...		Sync with IBM Cloudant Mac & iOS from Tap Zapp Softwar...		Working with Photos from Tap Zapp Softwar...
	Creating & Editing Forms from Tap Zapp Softwar...		Find & Replace from Tap Zapp Softwar...		Working with Calculations from Tap Zapp Softwar...
	Mail Merge from Tap Zapp Softwar...		Creating Forms & Records from Tap Zapp Softwar...		Multi-User Sync from Tap Zapp Softwar...
	Customizing and Printing Layouts from Tap Zapp Softwar...		Tap Forms Organizer. ... cabinet for your life from Tap Zapp Softwar...		Sharing Your Database Documents from Tap Zapp Softwar...

What's Different in Tap Forms 3 and Tap Forms 5

- Tap Forms 3
 - Only one database document
 - Encryption done at the database or form field level
 - Single column and multi-column views
 - Syncing via iCloud Drive or Dropbox
- Tap Forms 5.0
 - Multiple database documents available
 - Encryption only at the database level
 - Added calendar view, map view, and photo grid view
 - Syncing via Wi-Fi (nearby) or IBM Cloudant— can be different for each database document
- Tap Forms 5.1 added
 - Syncing via iCloud Drive or Apache CouchDB
 - Touch Bar support for MacBook Pros

My Tap Forms 3 Document

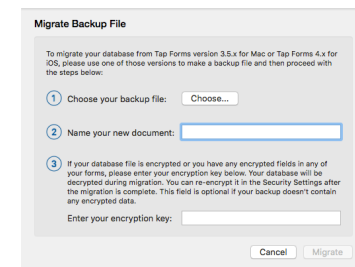
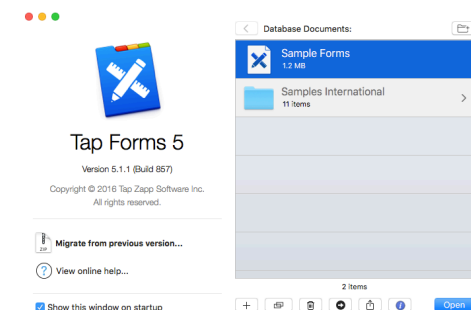
- Note that 2 of the forms have a lock icon indicating they are encrypted
- The number of records is also indicated on the right



Category	Record Count
Personal	
Bank Accounts	2
Blood Donor Cards	1
Credit/Debit Cards	8
Driver's License	1
Email Accounts	6
Frequent Flyer Numbers	1
Health Insurance	5
Home Insurance	1
Immunizations	13
Investment Accounts	3
JBK's Reading	247
Maranatha Projects	14
Memberships	14
My Software	16
Passport Information	2
User Names & Passwords	68
Vehicle Insurance	1
Miscellaneous	
Garage Door Code	4
Log Book	3

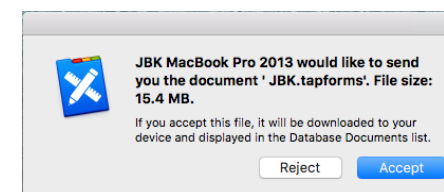
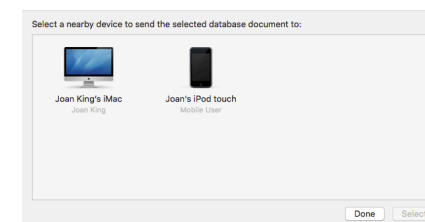
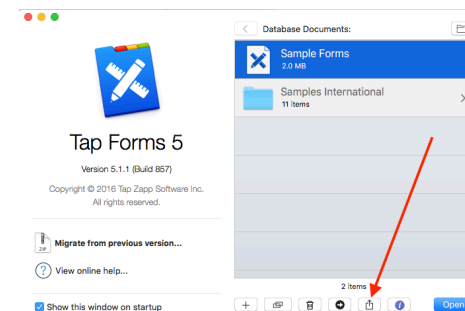
Converting from Tap Forms 3 to Tap Forms 5

- In Tap Forms 3
 - In the File menu click **Backup**
 - Confirm where the file will be saved
 - Click **Backup**
- In Tap Forms 5
 - Click **Migrate from a Previous Version...**
 - Choose the backup file you made
 - Name the new document
 - Supply encryption key if necessary
 - Click **Migrate**
 - Re-encrypt your database in Preferences



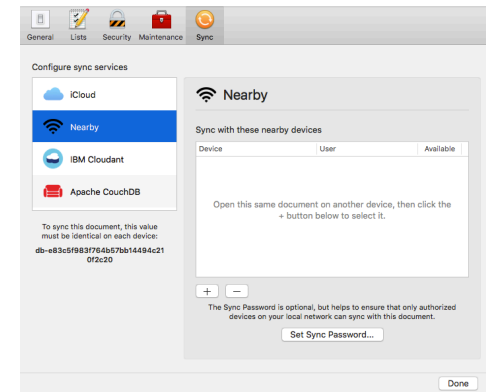
Sending a Document to Another Device

- Both devices must be within Wi-Fi range and have Tap Forms open
- Documents on both devices must be closed
- Select the document you want to send and click on the **Share** button at the bottom of the window
- Click on the image of the device you want to send to and then click **Select**
- On the receiving device click **Accept**



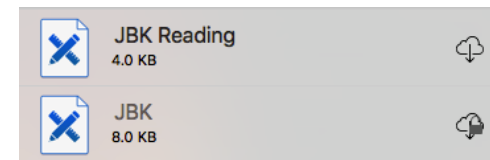
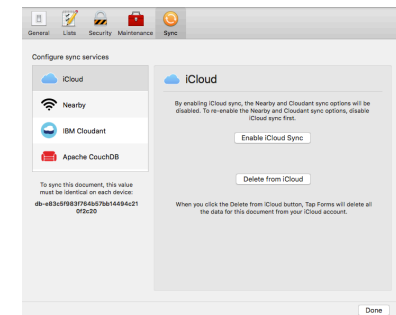
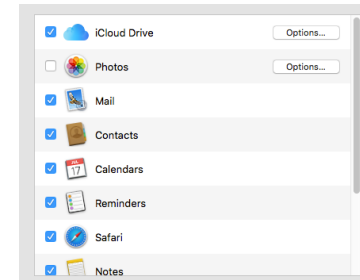
Nearby Syncing

- The document you want to sync must be on both devices
- Select the document you want to set up syncing for and open it
- Select **Preferences** from the Tap Forms menu and select **Sync**
- Select **Nearby** Syncing
- For Nearby syncing the other device must be on and have the same document open
- If the device isn't listed, click on the **+** button to add it
- Select the device and click **Done**



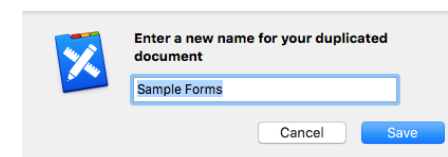
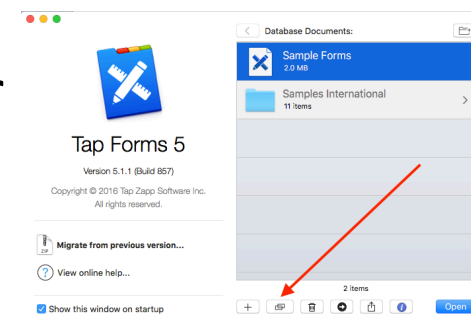
iCloud Drive Syncing

- Make sure that iCloud Drive is active in System Preferences for all devices
- Open the document you want to sync
- Select **Preferences** from the Tap Forms menu and select **Sync**
- Select **iCloud** syncing and click on **Enable iCloud Sync**
- The file will show up on your other devices with a cloud download indicator
- Open the file to do the initial download of the file

























Creating a New Database Document Using the Sample Forms Document










- Select the Sample Forms Document
- Click on the **Duplicate** icon at the bottom or select **Duplicate Document** from the File menu
- Enter the new name you want for the new document and click **Save**
- You can delete any of the provided forms you don't want
- Or you can export just the form templates you want from the original Sample Forms document and then create a new document and import the form templates you exported





Sample Forms

Business		
 Audio Dictation		(0)
 Business Accounts		(0)
 Calling Cards		(0)
 Client Call Log		(2)
 Clients		(2)
 Frequent Flyer Numbers		(0)
 Investment Accounts		(0)
 Software Licenses		(0)

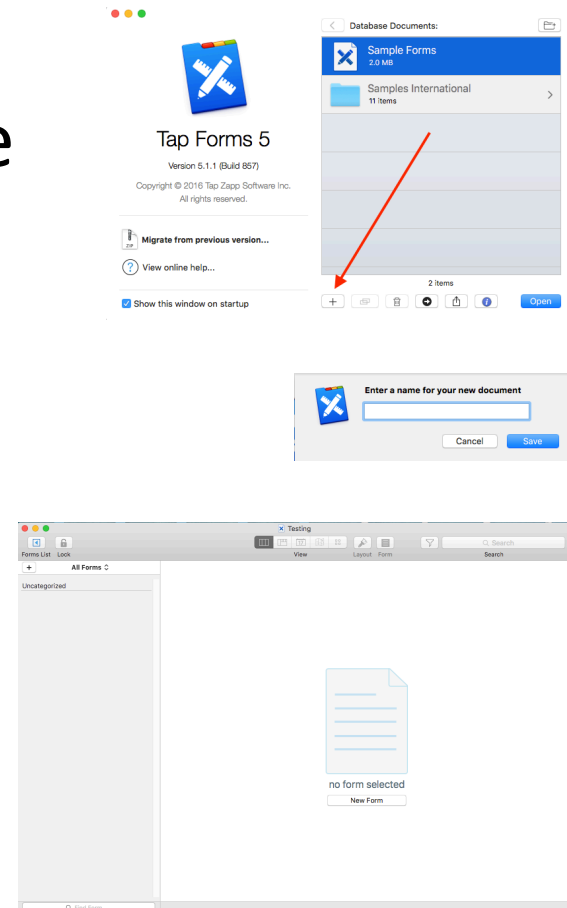
Personal		
 Bank Accounts		(0)
 Blood Donor Cards		(0)
 Credit & Debit Cards		(0)
 Daily Journal		(0)
 Driver's License		(0)
 Email Accounts		(0)
 Health Insurance		(0)
 Home Inventory		(2)
 Homework Assignments		(0)
 Important Dates		(0)
 Passport Information		(0)
 Personal Health Cards		(0)
 To Do		(2)
 Website Logins		(0)

Miscellaneous		
 Garage Door Code		(0)
 Home Insurance		(0)
 Log Book		(0)
 Loyalty Cards		(0)
 Memberships		(0)
▼  My Movie Library		(4)
<input type="checkbox"/> Genre: Action & Adventure		
<input type="checkbox"/> Genre: Comedy		
 Security Alarm Codes		(0)
 Serial Numbers		(0)
 Vehicle Insurance		(0)

Uncategorized		Hide
 Expenses		(1)
▼  Wine Collection		(1)
<input type="checkbox"/> Type: Dessert Wine		

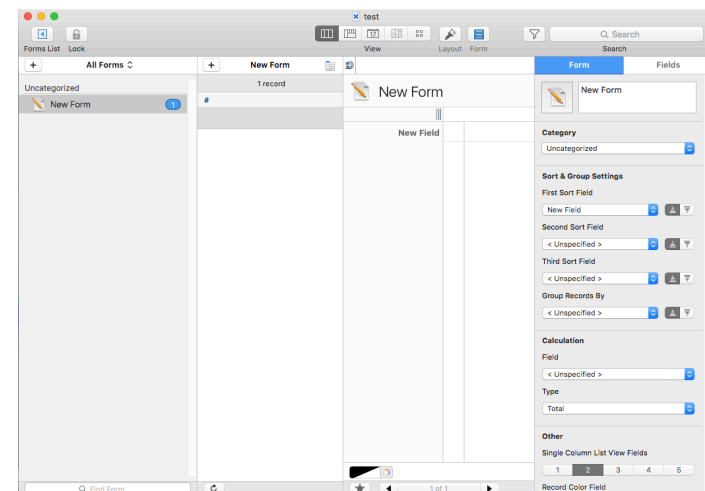
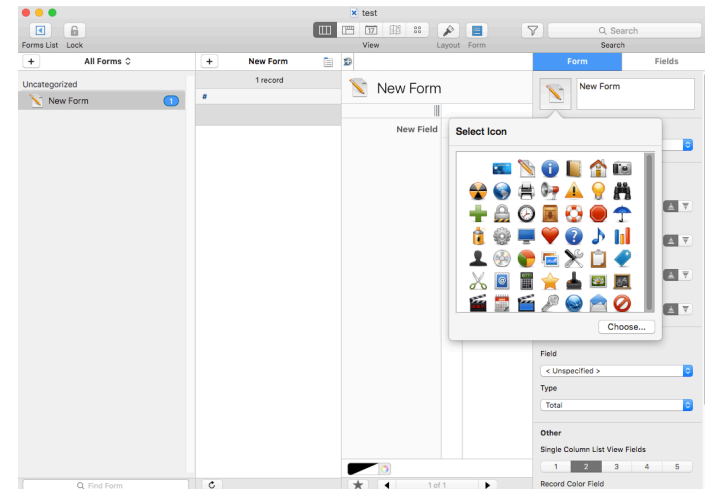
Creating a New Document from Scratch

- Click on the **Plus** sign or select **New Document...** from the File menu
- Provide a name for the new document and click **Save**
- You will now need to create a form for your new document
- Click on **New Form**



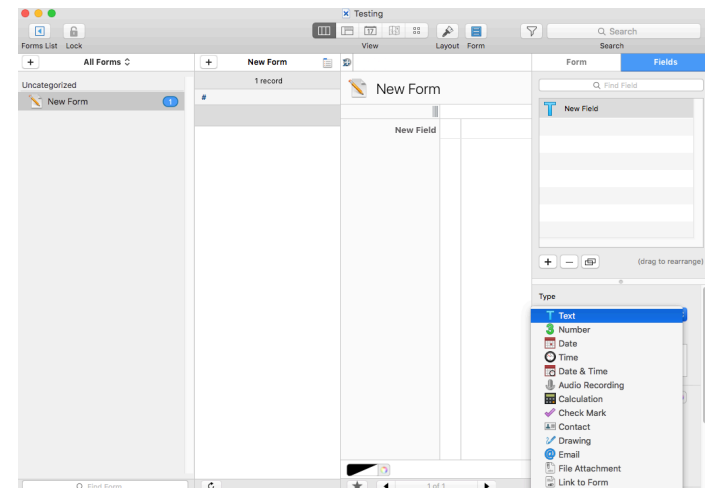
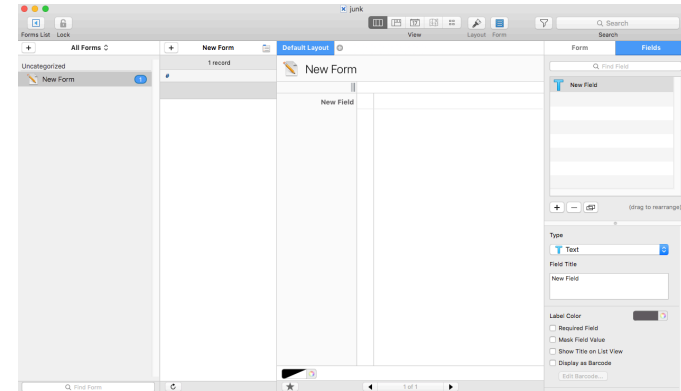
Creating a New Form

- Select the icon you want to use to identify the form
- Specify the name you want for the form
- Other items can be specified after fields are defined



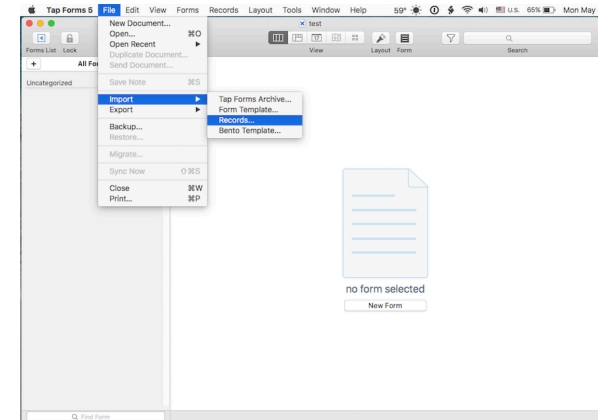
Defining Fields in the Form

- Click on the **Fields** tab and name the field you are creating
- Select the type of field you want to create
- Click the + sign to create each next field you want
- Create records and fill them in with the data you want



Importing Data to Create a Form

- You can import Excel XLSL files or CSV text files
- Select **Import Records** from the File Menu
- Select the file you want to import and supply the info about its format
- The first row of the file must specify the field names to use
- If you have date information, make sure you specify the correct format for the import
- You need to specify how each field is to be imported—default is text



Import Records

1 Choose a file to import: Choose... JBK's Reading.xlsx

Choose a folder of photos: Choose...

Choose a folder of attachments: Choose...

2 File encoding: Unicode (UTF-8)

Column delimiter: Comma ,

Date format: MM/dd/yyyy - 05/21/2017

Time format: No Value

3 Select a form to import into: New Form

JBK's Reading

4 Assign field types

Field Name	Field Value	Field Type
Author	A. J. Cronin	Text
Title	Shannon's Way	Text
Genre	Fiction	Text
Pages	313	Text
Started	40061.000000	Text
Finished	40065.000000	Text
Keeper	0	Text

Presets: < Unspecified > + -

Cancel Import

Printing Data

- Tap Forms supports printing in various formats
 - Individual records, 1 per page
 - Table of records in a list format
- You can create and print Bar Codes
- You can print labels using Avery layouts or create your own layout.

Excellent Problem Support

- Sent an e-mail to support@tapforms.com about a problem with export/import records on Friday at 2:14 pm
- Got immediate automated response at 2:14 pm
- Got personal response at 2:20 pm
- Started interaction to get problem resolved and also brought up second problem with map view
- By 4:02 pm I had sent a total of 8 messages and received 11 messages
- Problems were resolved
- Sent another message Saturday night at 11:11 pm and got a response at 11:19 pm

DEMO

