# Create and Manage Intake Forms

## Help Guide

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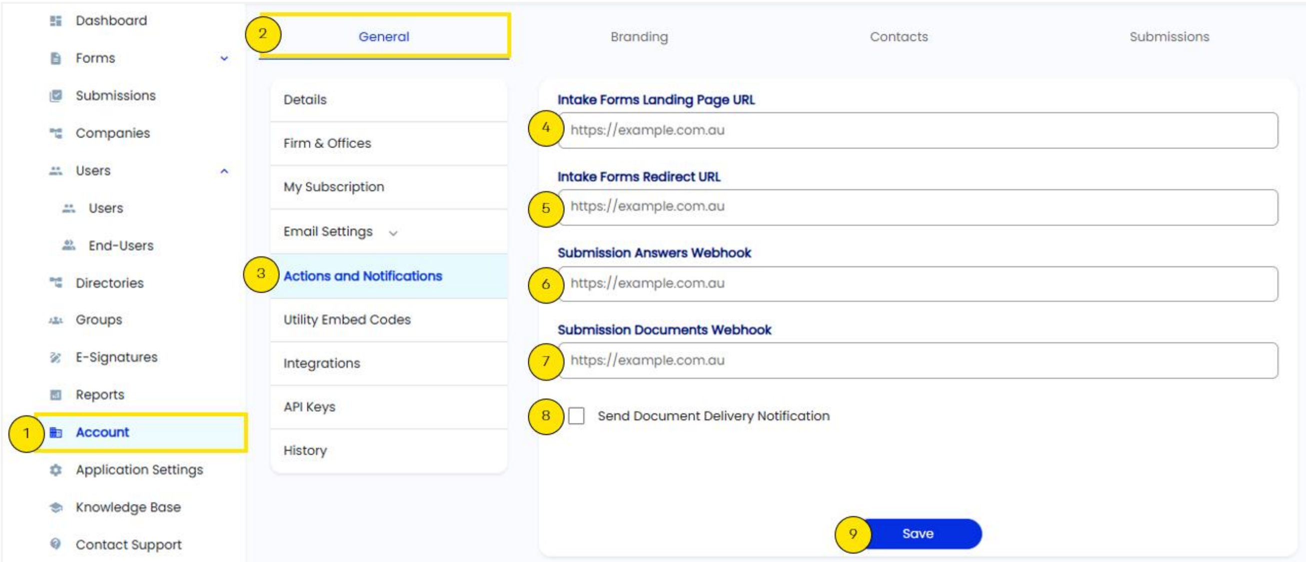
# 1. Create and Manage Intake Forms

## 1.1 Setting up a New Intake Form

An Intake Form allows individuals to enter their details via an online form. Smarter Drafter has an Intake Form creation feature to streamline the process.

1. In the **Smarter Drafter Pro App**, click **Account** in the navigation menu.
2. Click the **General** tab
3. Click **Actions and Notifications**.

This is where the **Intake Form** is set up.




This is what to enter in each field:

4. **Intake Form Landing Page URL.** This is the URL where the customer or client will access the form.

5. **Intake Forms Redirect URL.** After the customer or client completes the form and hits submit, they will be redirected to this page. It will probably have a "Thank you" message, or something similar.

6. The **Submission Answers Webhook** sends a JSON file that includes all the answers submitted by the end-user when they fill out a form. This allows other applications to receive and process the submitted answers automatically.

7. The **Submission Documents Webhook** is used to send generated documents after a user submission. When the necessary documents are generated based on the user's submission, this webhook sends them to other applications or services for further processing or storage.

**Note:** Overall, webhooks in Smarter Drafter Pro facilitate the seamless exchange of information, ensuring that submitted answers and generated documents are shared and utilised by other applications efficiently.

8. Tick the box to **send a document delivery notification**. Will notify the form filler when the generated document/s are delivered.

9. Click **Save** when all details are correct.

# 2. Managing the Intake Form

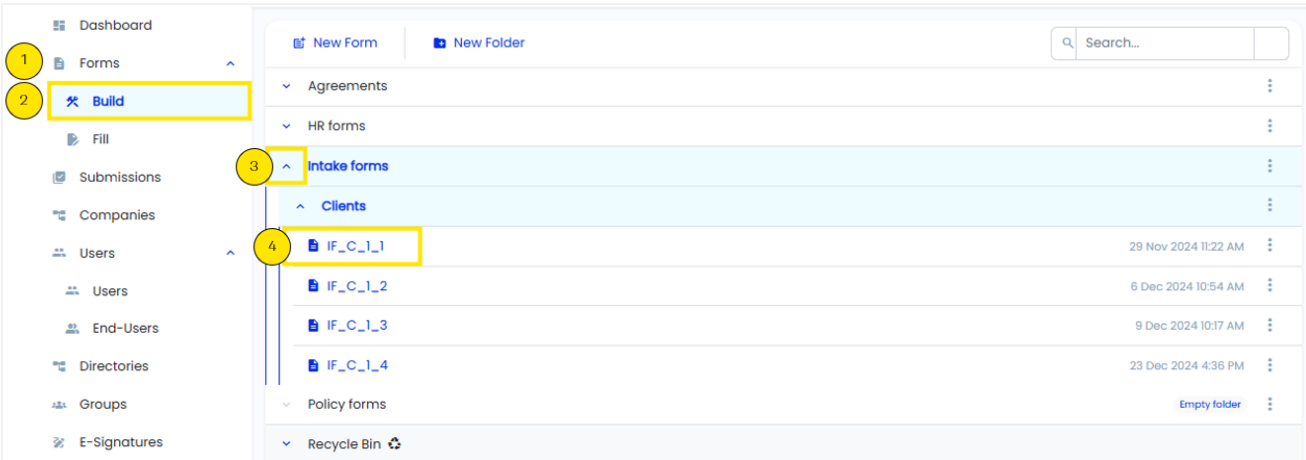
## 2.1 Branding and Colours

Refer to the [Branding and Logos Help Guide]() to set up the appearance of the form.

## 2.2 Designating an Intake Form

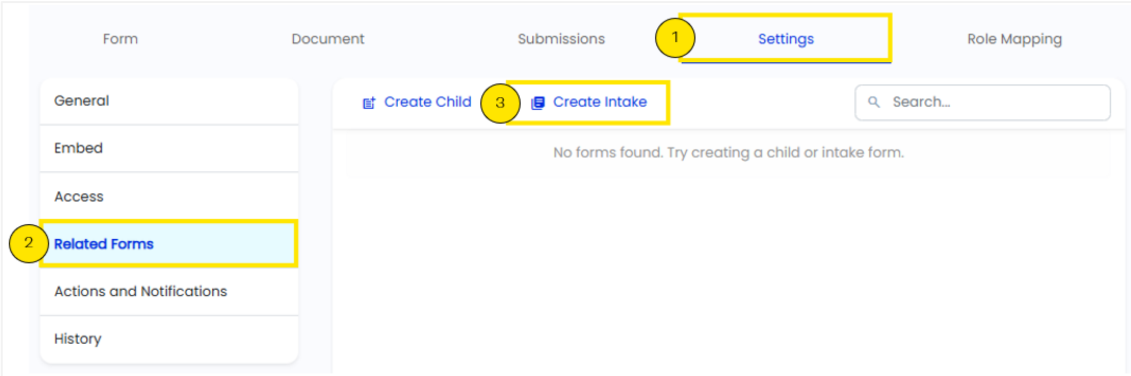
Open the desired intake form:

1. Click **Forms**.
2. Click **Build**.
3. Open the **folder** where the intake form is saved. In this example, the folder is called "Intake forms".
4. Click the required **form**.



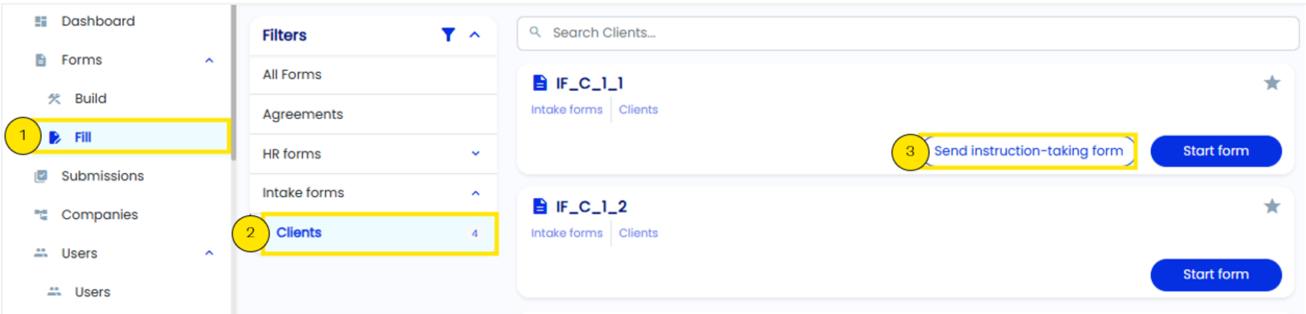
The form will now open in the Form Builder. We can create an Intake Form for the organisation.

1. Click the Settings tab.
2. Click Related Forms.
3. Click Create Intake.




## 2.3 Preview the Form

Test the form style settings. Click Forms > Fill in the navigation menu. Find the form that is designated as an Intake Form, (it can be found in its folder or under All Forms), and create a form by clicking Send instruction-taking form.



## 2.4 Test the Form

The form preview will open. You can check the colours and branding that you set in the settings.