# smarter drafter PRO

by tensis

# Embed Forms

## Help Guide

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# 1.  Embedded Forms

The embedded forms feature allows a form to be embedded into a website.

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**Note:** The process of embedding a form requires web development skills and is beyond the scope of this document.
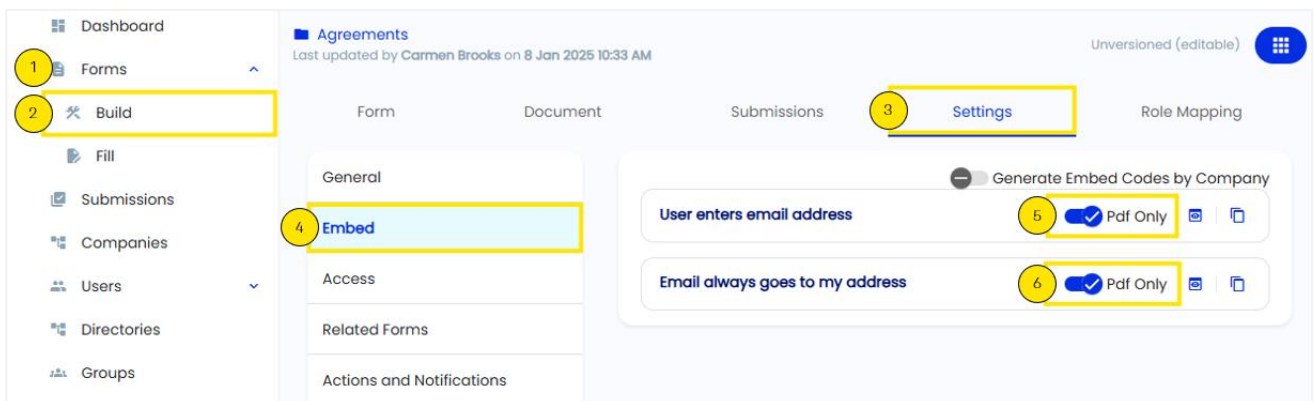
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This document provides guidance to set up an embedded form to function as required, after the form is built into a website.

## 1.1  Open the Form

To embed a selected form in a website, first navigate to the required form.

1. Click Forms.
2. Click Build and find the desired form in the folder structure.
3. When the form is open, click Settings.
4. Click Embed.



## 1.2  Set Up the Embedded Form

5. The **User enters email address** option generates an embedded form that can only be completed by the user who initiated the form. Use the toggle to determine whether the form will generate a DOCX version of the document, or only a PDF (by default).

6. The **Email always goes to my address** option will create an embedded form to be filled out by others but delivers an email to you, the form creator. You may opt to generate a DOCX version of the document, or only a PDF (by default).

## 1.3    Preview the Form and Generate the Code

7.    Click the Preview button on the desired form type to see a preview. Fill in the previewed form and review the output document to determine that the results are satisfactory.

8.    When the form output is as required, click the Copy Code button to copy the embed code to the clipboard. This code can be embedded in a website (web development skills are recommended).