smarter drafter PRO by tensis

File Uploads

Help Guide

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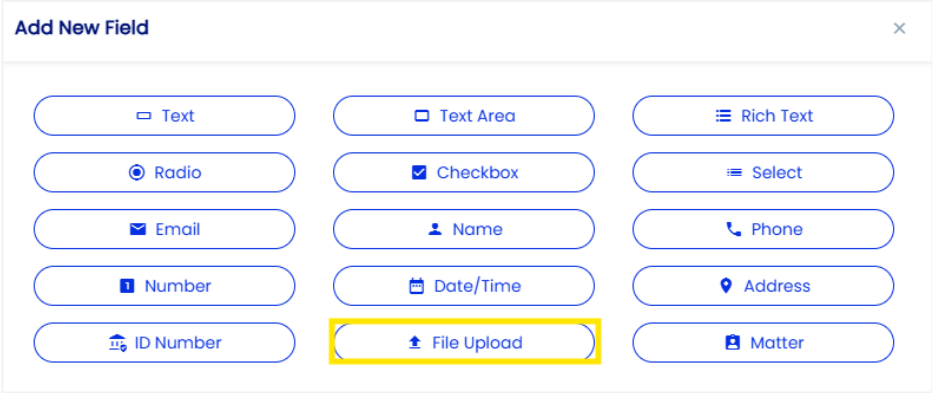
1. File Upload Fields in Forms

It's possible to allow form fillers to upload files when filling out a form. This feature is useful to collect copies of ID, or relevant supporting documentation.

To create a file upload field, add a new field to the form and select the **File Upload** field type. In this example, a form will be cloned, a new field added, and the **File Upload** field will be selected.

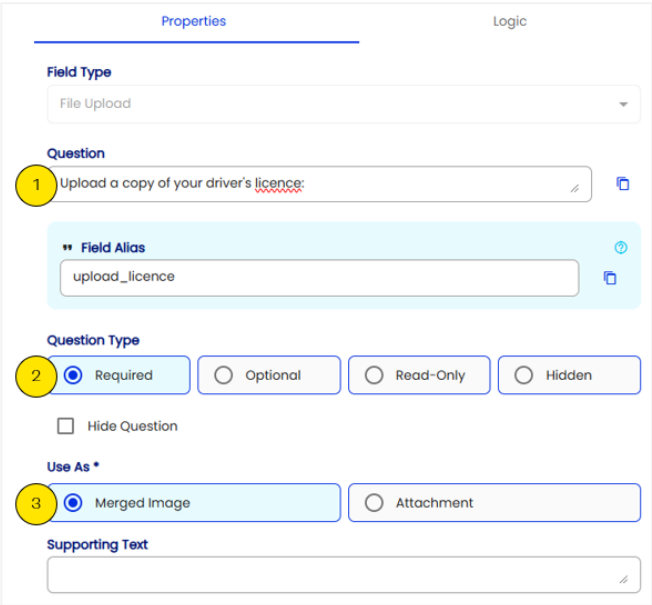


1.1 Create the File Upload Field

Add the **Question** to prompt the form filler on what file is required.

Determine if the upload is **Required** or **Optional** and select the appropriate button.

The **Use As*** feature gives two options. These are explored below.

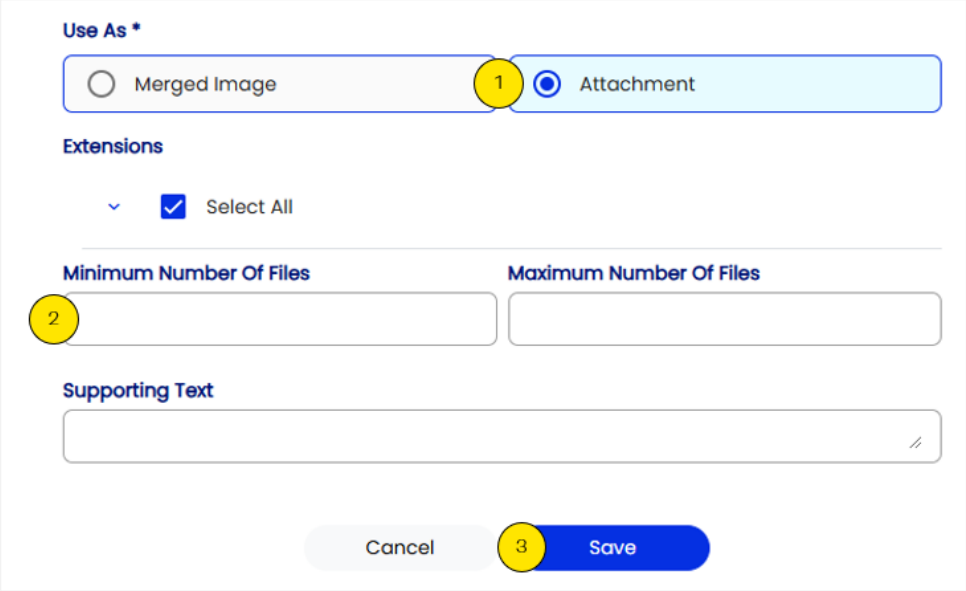


1.2 The Use As* Feature

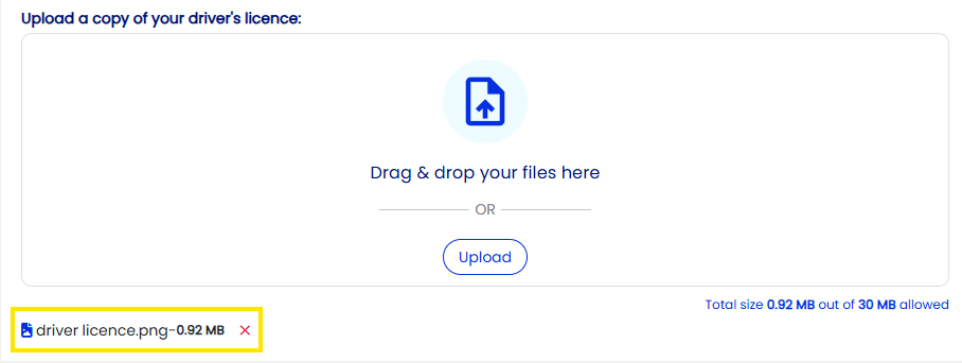
By selecting **Attachment**, the uploaded file will be generated separately and can be downloaded once the document has been submitted. This option does not allow the file to be inserted into the document and it doesn't provide a preview of the uploaded file to the form filler. The file name can be seen underneath the file upload window.

If the document needs to be downloaded as a separate document:

1. Select **Attachment**.
2. Set a minimum and/or maximum **number of files** (this is optional).
3. Click **Save**.

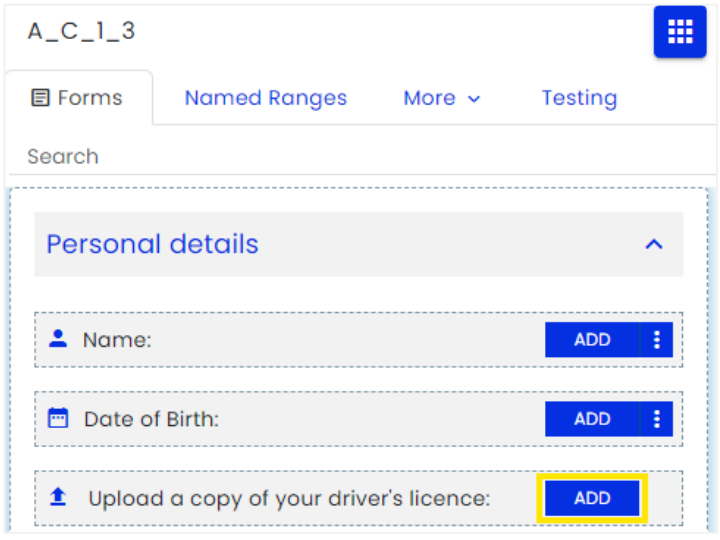


When the form is filled in, this is what the form filler sees:

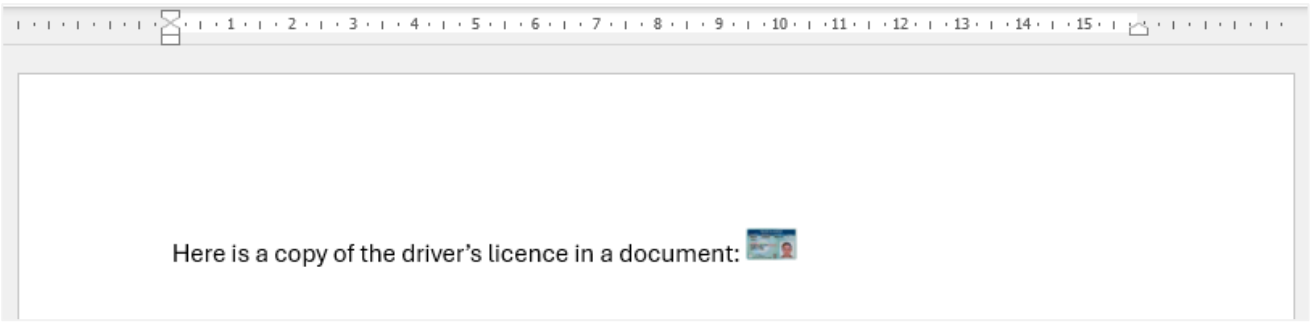


By selecting **Merged Image** in the **Use As*** field, a preview of the file is shown to the form filler in the form.

When the uploaded file is used as a **Merged Image**, the file can be inserted within the text of a generated document as a field. Simply add the image to the document template using the MS Word Smarter Drafter Word Add-In.



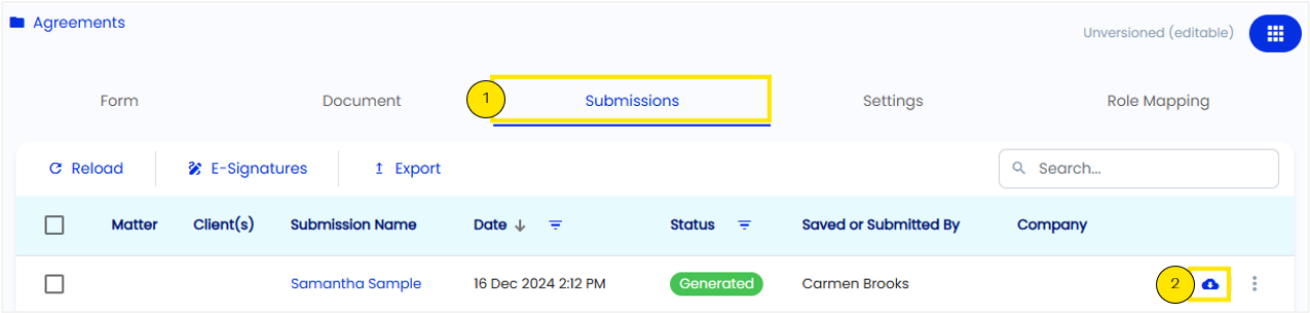
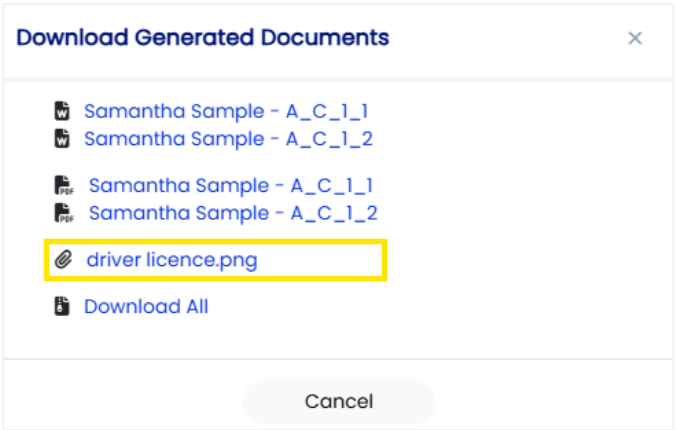
The Merged Image in a generated document looks like this thumbnail, (in this example, it's the driver's licence):



1.3 Download the File

A file uploaded with a form submission can be downloaded in the **Submission** tab of the Form Builder.

1. Click **Submissions**.
2. Click the cloud-shaped **download button**.



The image file is available to click for download in the list of available download options.