



Organising Forms

Help Guide

Published: 14 February 2025

Table of Contents

1.	Managing Forms and Folders.....	2
1.1	Move a Form to a New Folder.....	2
1.2	Create the New Form in the Destination Folder.....	3
1.3	The Form Opens.....	3
1.4	Delete the Original Form.....	3
2.	Delete a Folder.....	4

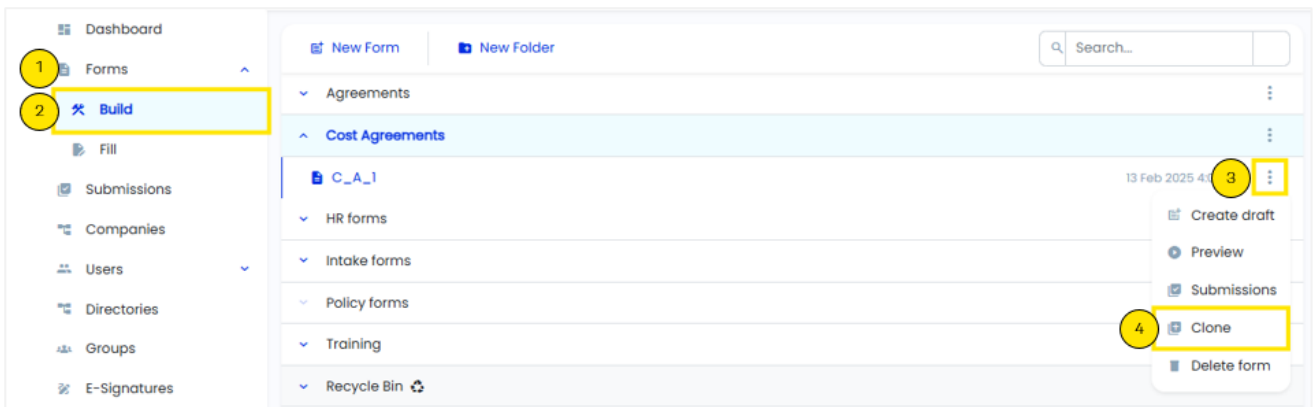
1. Managing Forms and Folders

To keep the collection of forms organised, it may be necessary to moved forms and delete folders. Follow the processes outlined to do it successfully.

1.1 Move a Form to a New Folder

To move a form to new folder, the process is to clone the form to the destination folder. To begin, find the form in the folder structure.

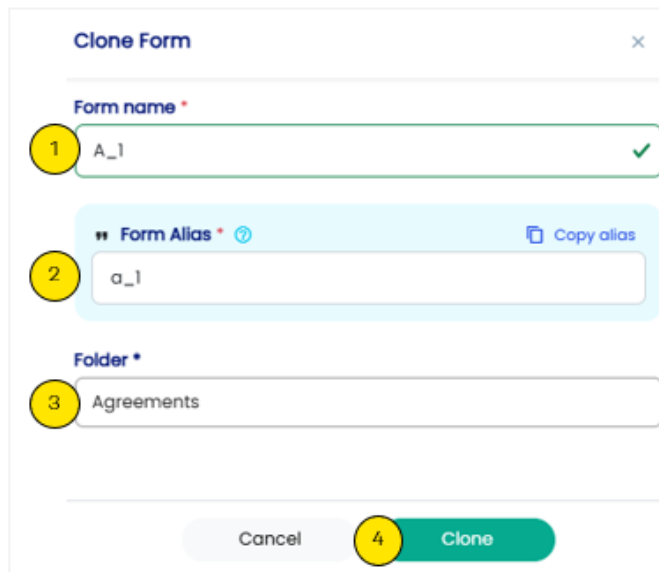
1. Click Forms.
2. Click Build. Open the folder and find the saved form.
3. Click the ellipsis (three vertical dots) on the form.
4. Click Clone.



1.2 Create the New Form in the Destination Folder

To create the new form:

1. Select a **Form name** that aligns with the naming convention in use.
2. Ensure the **Form Alias** is correct and reflects the form name.
3. Select the destination **Folder** to save the form.
4. Click **Clone**.



The image shows a 'Clone Form' dialog box with the following fields and actions:

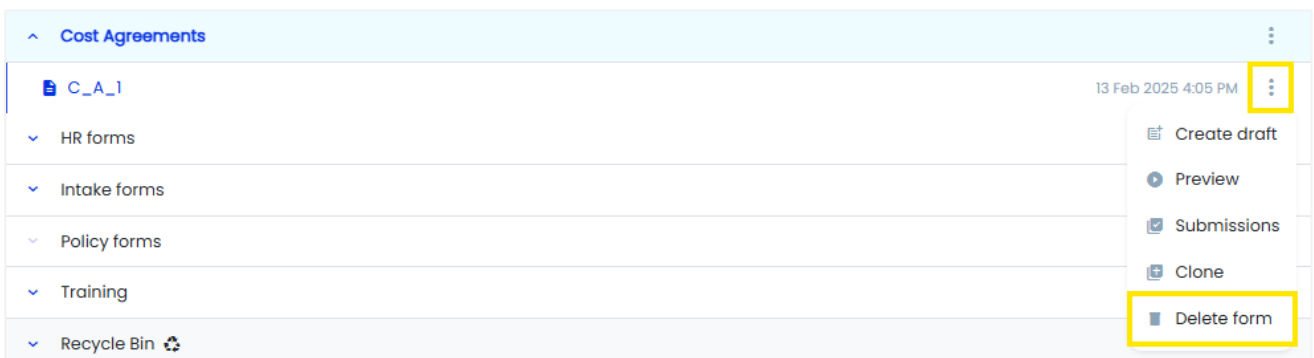
- Form name ***: Input field containing 'A_1' with a green checkmark. A yellow circle with the number '1' is next to it.
- Form Alias ***: Input field containing 'a_1'. A 'Copy alias' button is to the right. A yellow circle with the number '2' is next to it.
- Folder ***: Input field containing 'Agreements'. A yellow circle with the number '3' is next to it.
- At the bottom, there are two buttons: 'Cancel' and 'Clone'. A yellow circle with the number '4' is next to the 'Clone' button.

1.3 The Form Opens

The cloned form will open in the form builder. You can edit the form or close it.

1.4 Delete the Original Form

The form is now saved in the destination folder. In the form list, you can delete the original form, if it is not needed. Click the **ellipsis** on the form and click **delete**.

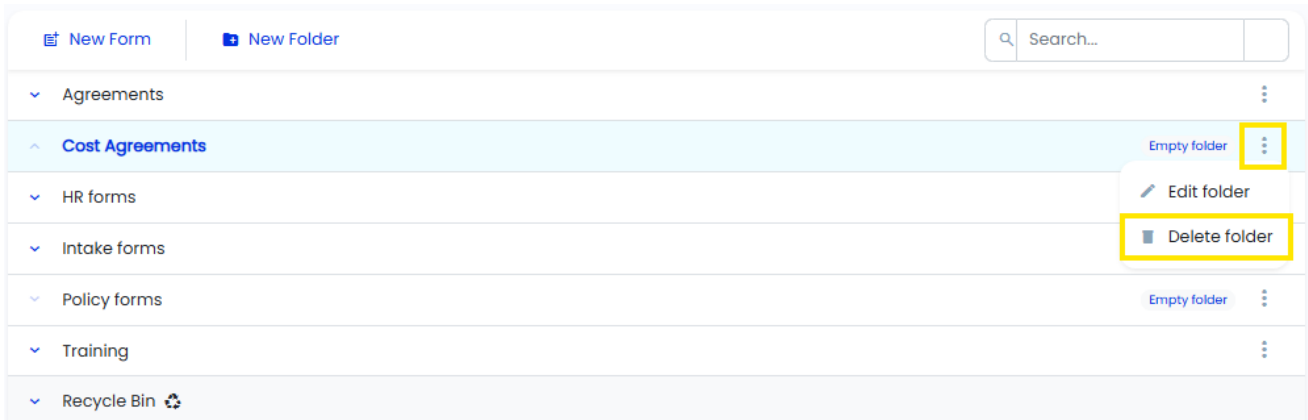


The image shows a list of forms under the heading 'Cost Agreements'. The first form is 'C_A_1', dated '13 Feb 2025 4:05 PM'. A yellow box highlights the ellipsis menu icon to the right of the form name. The menu is open, showing the following options: 'Create draft', 'Preview', 'Submissions', 'Clone', and 'Delete form'. A yellow box highlights the 'Delete form' option.

2. Delete a Folder

To delete a folder, use a similar process as used to delete a form:

1. Click the ellipsis beside the folder.
2. Click Delete folder.



The screenshot shows the Smarter Drafter interface with a list of folders. The 'Cost Agreements' folder is selected, and its context menu is open. The 'Delete folder' option is highlighted with a yellow box. The interface includes a search bar at the top right and a 'New Folder' button at the top left.

Folder Name	Actions
Agreements	⋮
Cost Agreements	Empty folder ⋮ Edit folder Delete folder
HR forms	
Intake forms	
Policy forms	Empty folder ⋮
Training	⋮
Recycle Bin 