



# Using Intake Forms

Help Guide

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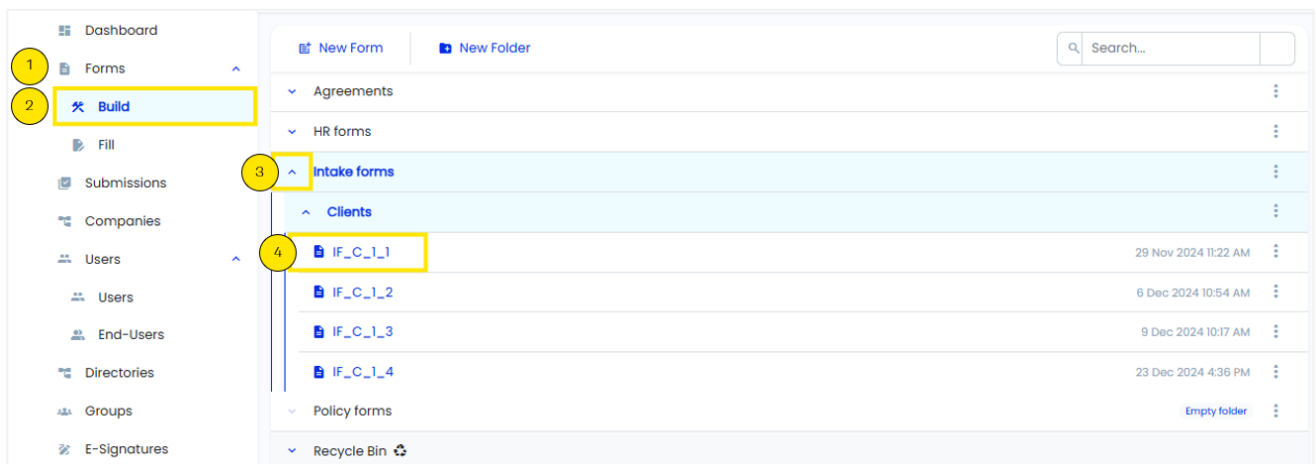
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# 1. Using Intake Forms

## 1.1 Designating an Intake Form

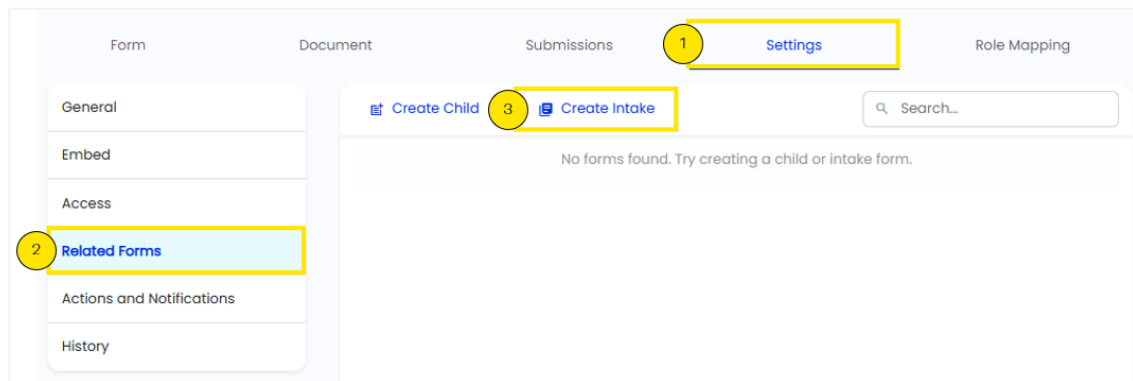
You can select from the forms in your collection to designate as an intake form for your organisation. To do this, start by opening the required form:

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

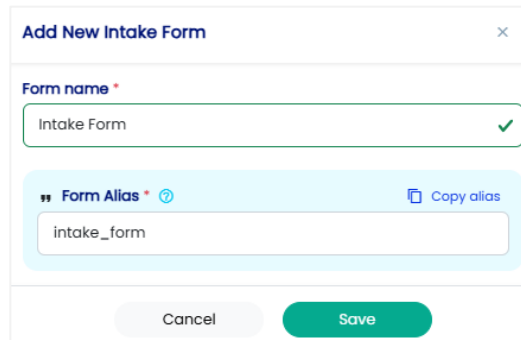


The form will now open in the Form Builder. We can designate it as an Intake Form for the organisation.

1. Click the **Settings** tab.
2. Click **Related Forms**.
3. Click **Create Intake**. This form is now designated as an intake form.



A pop up will appear, where you can give the form a new name (if required) and **save** it as an intake form.



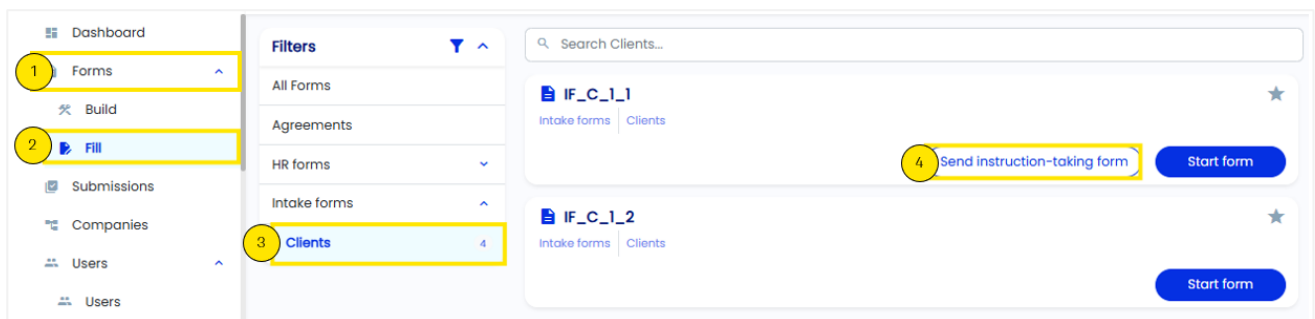
The screenshot shows the 'Add New Intake Form' pop-up dialog. It has a title bar with a close button (X). The form contains two input fields: 'Form name \*' with the value 'Intake Form' and a green checkmark, and 'Form Alias \*' with the value 'intake\_form' and a 'Copy alias' button. At the bottom, there are 'Cancel' and 'Save' buttons.

## 1.2 Preview the Form

Now that the form is designated, it's important to test the form and its style settings.

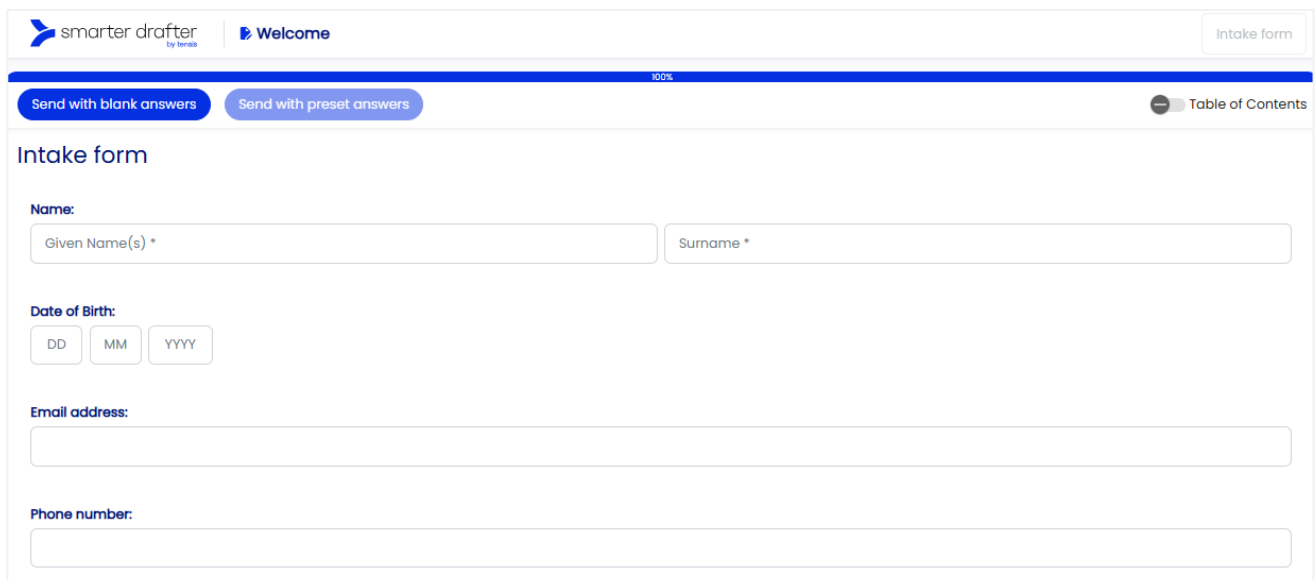
In the navigation menu:

1. Click Forms.
2. Click Fill.
3. Find the form that is designated as an intake form – in this example, it's in the Clients folder. It can be found in its folder or under **All Forms**.
4. Create a form by clicking **Send instruction-taking form**.



## 1.3 Test the Form

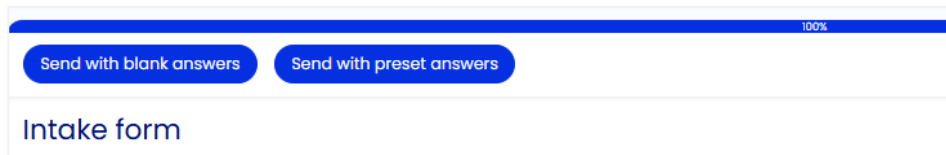
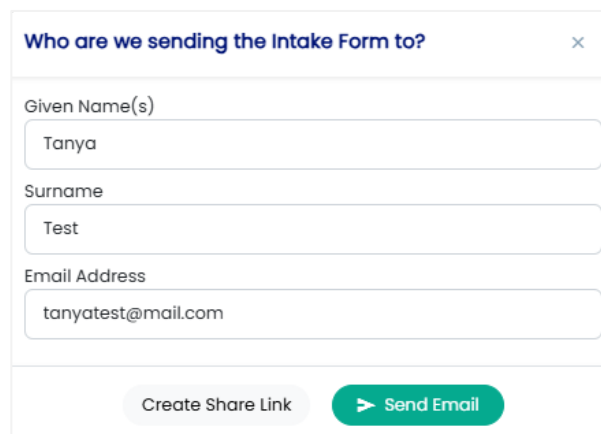
The form preview will open. You can check the colours and branding that you set in the settings. Fill in the form to test it.



## 1.4 Share the Form

In the top of the form, two buttons can be used to send the form to a recipient from who you need details. Select one of the buttons. If you send with blank answers, the recipient will get a blank form. If you send with preset answers the form will open for the recipient with the fields filled out by you.

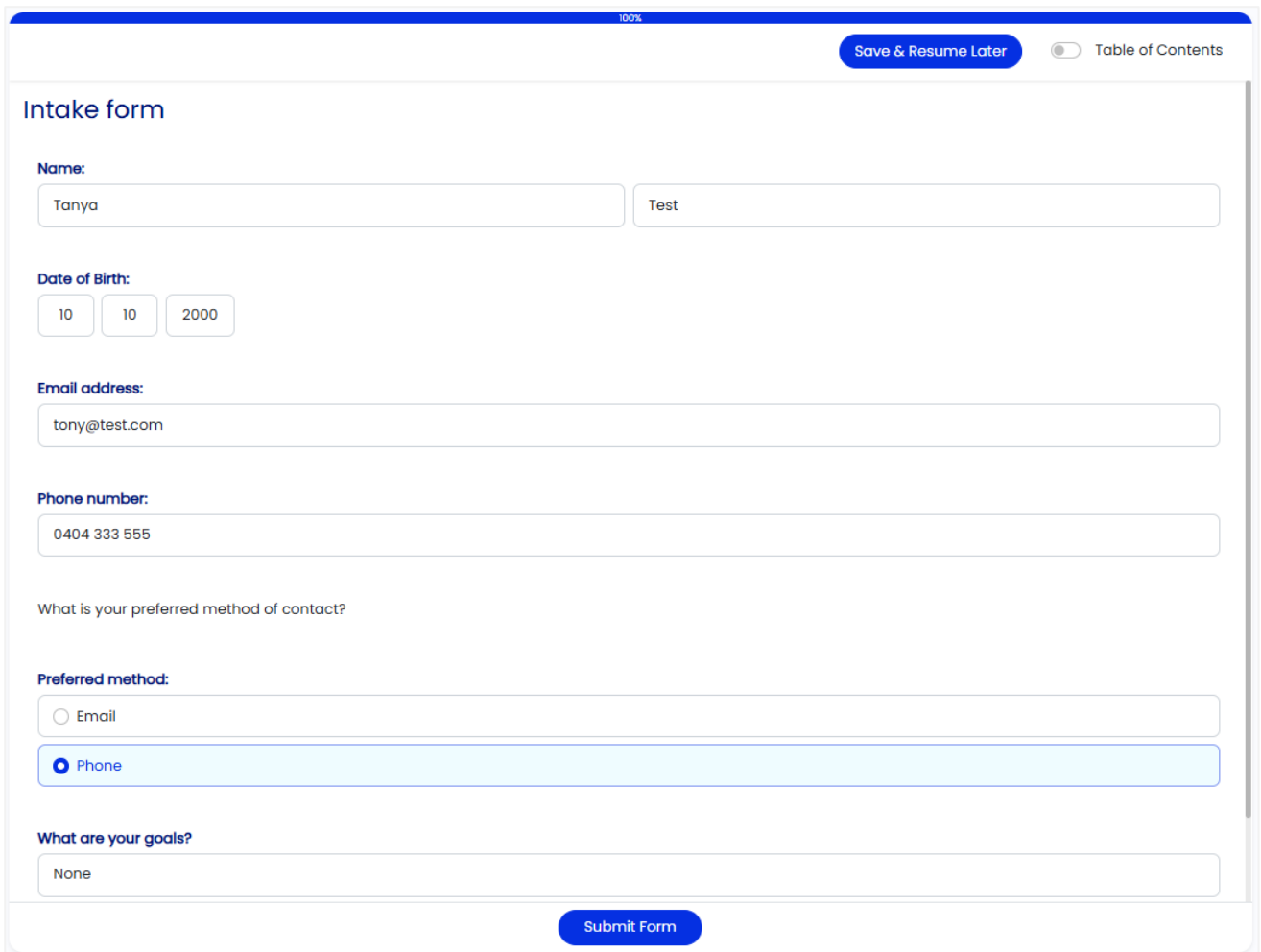
It is recommended that you send the form to yourself to test it.

A screenshot of the top part of a form interface. At the top right, there is a blue progress bar showing '100%'. Below it, there are two blue buttons: 'Send with blank answers' and 'Send with preset answers'. Below the buttons, the text 'Intake form' is displayed.A screenshot of a modal window titled 'Who are we sending the Intake Form to?' with a close button (x) in the top right corner. The modal contains three input fields: 'Given Name(s)' with the value 'Tanya', 'Surname' with the value 'Test', and 'Email Address' with the value 'tanyatest@mail.com'. At the bottom of the modal, there are two buttons: 'Create Share Link' and 'Send Email' (which is highlighted in green and has a right-pointing arrow).

## 1.5 Follow the Email Link

Open the email and review the wording. You may need to request changes from your administrator.

Follow the link to open the **Intake Form** and complete it. Click **Submit**.



The screenshot shows an 'Intake form' interface with the following fields and options:

- Name:** Two text input fields containing 'Tanya' and 'Test'.
- Date of Birth:** Three dropdown menus showing '10', '10', and '2000'.
- Email address:** A text input field containing 'tony@test.com'.
- Phone number:** A text input field containing '0404 333 555'.
- What is your preferred method of contact?** A question followed by a 'Preferred method:' section.
- Preferred method:** Two radio button options: 'Email' (unselected) and 'Phone' (selected).
- What are your goals?** A text input field containing 'None'.
- Submit Form** button at the bottom center.

## 1.6 Open the Submission

Open the **Submissions** list from the navigation menu.

You can now review the submission details by clicking the **Submission Name**.



	Matter	Client(s)	Submission Name	Document	Date ↓	Status	Saved or Submitted By	Company
<input type="checkbox"/>			Carmen B	IF_C_1_1	31 Jan 2025 4:06 PM	Submitted	Carmen B	