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Using Intake Forms

Help Guide

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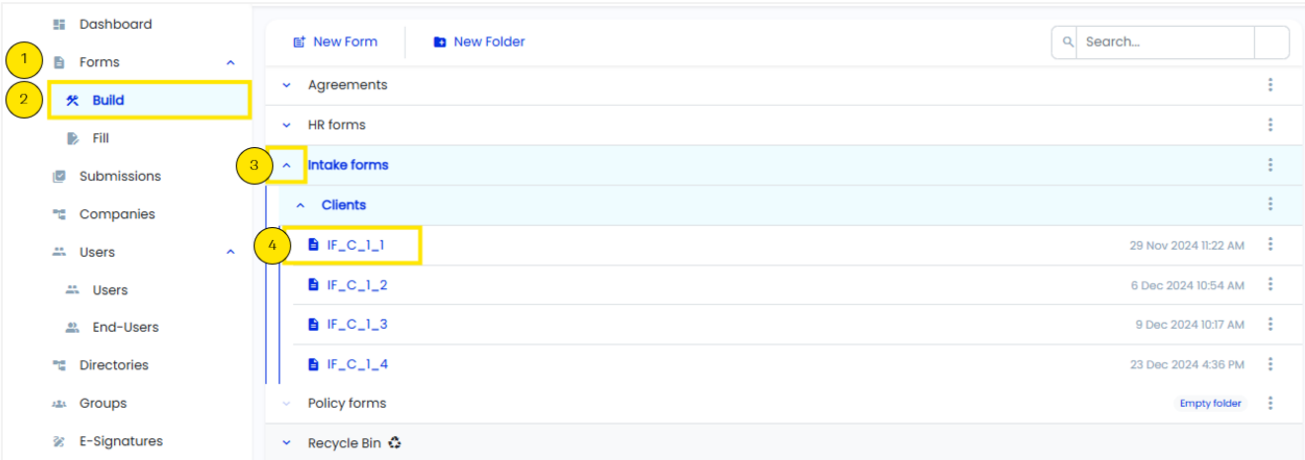
Table of Contents

1. Using Intake Forms

1.1 Designating an Intake Form

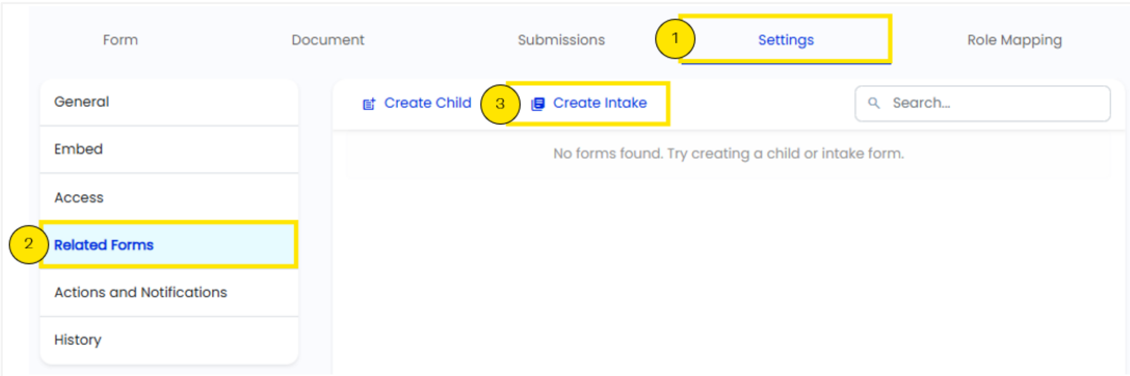
You can select from the forms in your collection to designate as an intake form for your organisation. To do this, start by opening the required form:

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**.

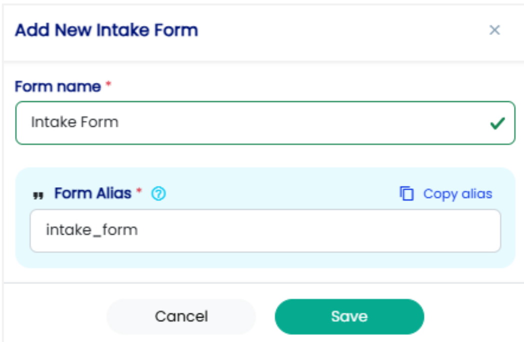


The form will now open in the Form Builder. We can designate it as an Intake Form for the organisation.

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.

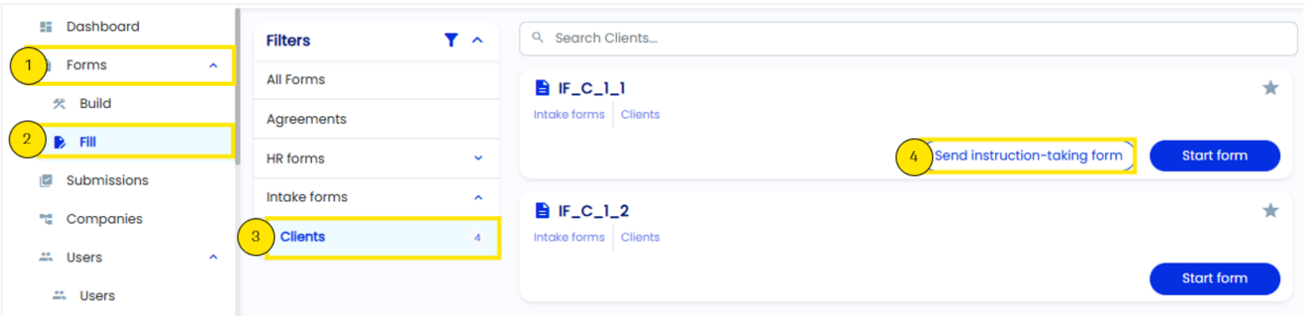


1.2 Preview the Form

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

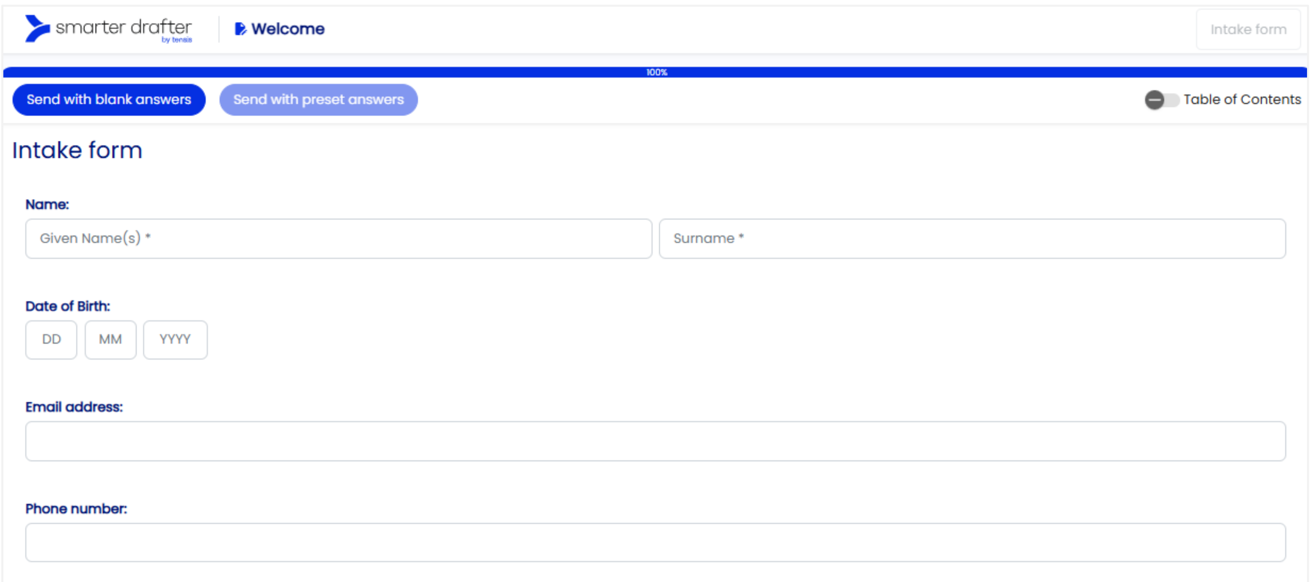
In the navigation menu:

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

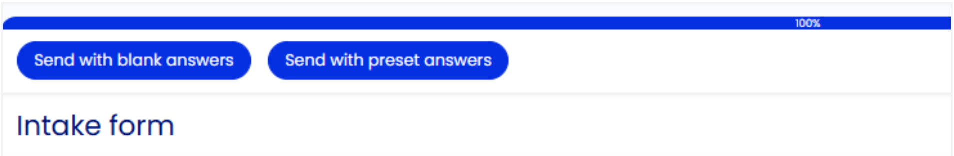
The form preview will open. You can check the colours and branding that you set in the settings. Fill in the form to test it.

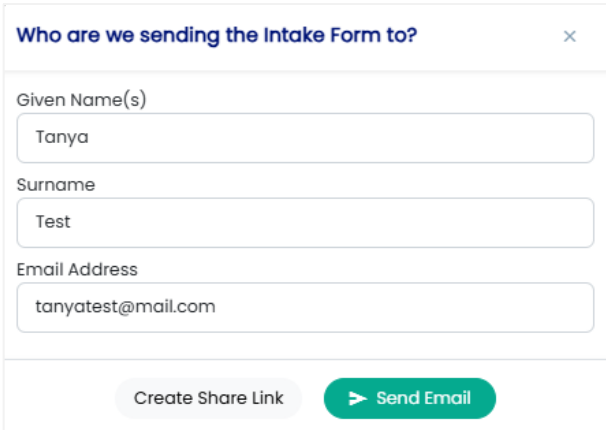


1.4 Share the Form

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.

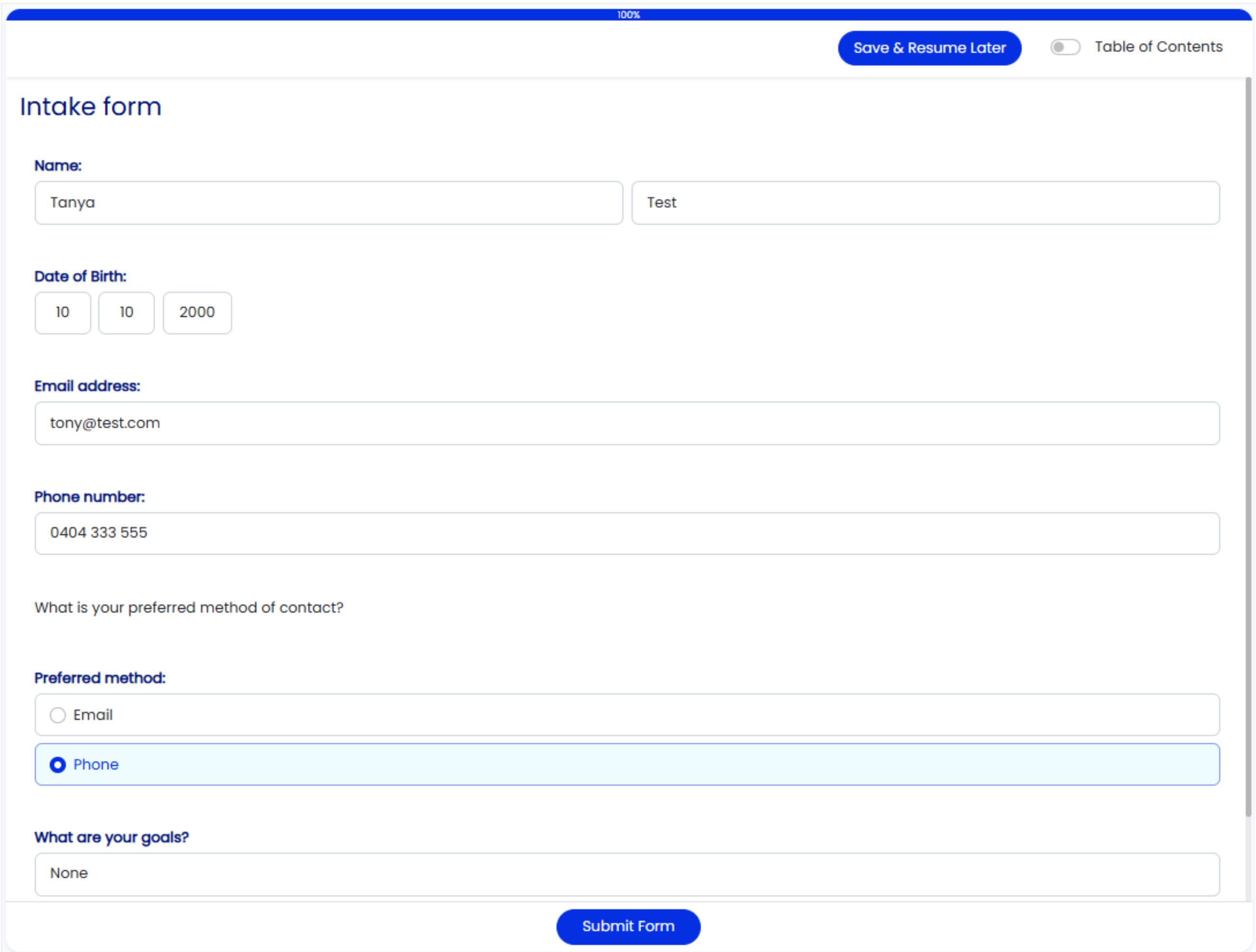




1.5 Follow the Email Link

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.



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.