smarter drafter PRO
by tensis

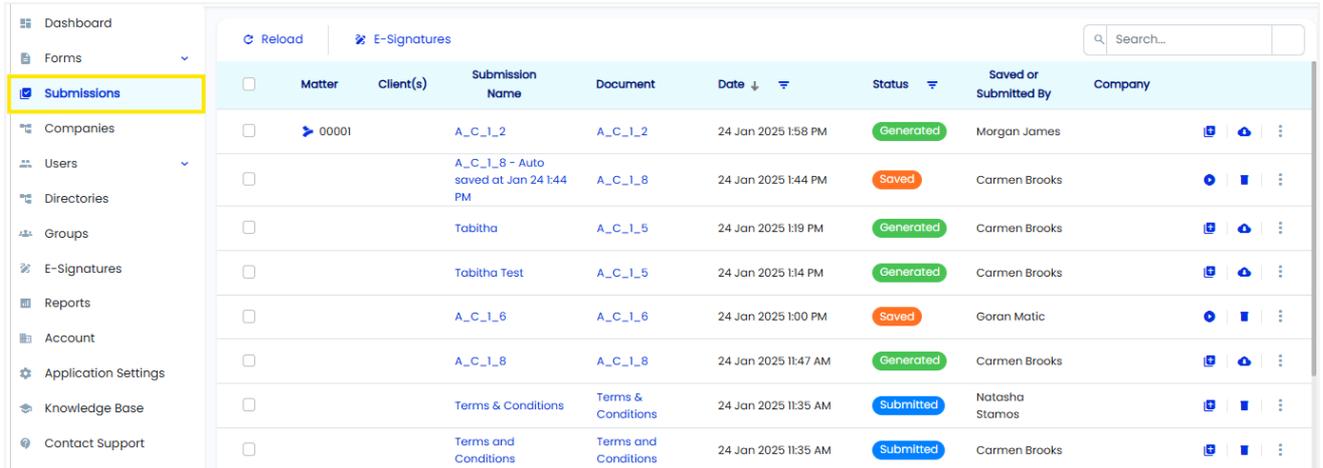# View and Manage Submissions

Help Article

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1. Submissions List

When a form is filled out and submitted, details of the submission are recorded in the **Submissions List**. To open the Submission List, click the **Submissions** button in the navigation menu.

1.1 Reviewing Submissions

The submission list has all the details about all form submissions. Each submission in the list has a **Status**.

1. **Generated** status indicates that a document has been generated. The document can be downloaded by clicking the cloud shaped download button.

2. A **Saved** status indicates that the form has been partially filled and saved. The **Resume** button (a circle with an arrow) enables you to reopen the form and continue filling it in.

3. To create a new document from a form that was previously generated, click the small, square **clone** button.

4. To **delete** the submission, click the small trash button.

1.2 Additional options

The **ellipsis button** (three vertical dots) offers options:

1. Click **View Details** to open a slide out panel that contains all the **Details** about the form filling.

2. Click **Open in builder** to open the form in the builder, where it can be edited for future form fillers.

3. Click **Edit Submission** to change the name of the **Submission** – this is useful to manage the list and ensure that your naming convention is followed.

4. Your **integrated systems** (which may differ from those pictured: iManage and NetDocuments) will be available here, to enable you to send the generated document to the required integrated system.

	Matter	Client(s)	Submission Name	Document	Date ↓ ≡	Status ≡	Saved or Submitted By	Company	
☐	➤ 00001		A_C_1_2	A_C_1_2	24 Jan 2025 1:58 PM	Generated	Morgan James		⊞ ☁ ⋮
☐			A_C_1_8 – Auto saved at Jan 24 1:44 PM	A_C_1_8	24 Jan 2025 1:44 PM	Saved	Carmen Brooks		≡ View Details
☐			Tabitha	A_C_1_5	24 Jan 2025 1:19 PM	Generated	Carmen Brooks		✎ Open in builder
☐			Tabitha Test	A_C_1_5	24 Jan 2025 1:14 PM	Generated	Carmen Brooks		✐ Edit Submission
☐			A_C_1_6	A_C_1_6	24 Jan 2025 1:00 PM	Saved	Goran Matic		● Send to iManage
☐			A_C_1_8	A_C_1_8	24 Jan 2025 11:47 AM	Generated	Carmen Brooks		nd Send to NetDocuments
									▯ Delete

Note: There may be submissions made with a form when it was in unversioned, draft and published states. To access a required submission, the relevant form in its relevant state must be selected.

1.3　Details Panel

When you click the **View Details** button (above) this panel will appear. It typically has three tabs: the Details of the submission including date and associated matter ID, the **Answers** tab where the form filler responses are found, and a tabl where you can view the **Form Templates** associated with the form.

There may be additional tabs, if there are named ranges or other features in the form. This panel will also appear if you click the **Submission Name** (above).

Fran Sample			✕
Details	Answers	Named Ranges	Form Templates
ID:		60e74e41-dd7f-267b-d7db-aef269b1f270	
Submission Name:		Fran Sample	✏
Document:		A_C_1_3	
Matter:		Not set	+
Date:		18 Dec 2024 12:45 PM	
Status:		Generated	
User Name:			
Email:			
Company:			

1.4   Answers Panel

If you click the **Answers** tab, you can access the answers that were filled into the form. There is an Export button which enables the download of a CSV file containing all of the answers.

Fran Sample   ✕

| Details | Answers | Named Ranges | Form Templates |

⇕ Export

1. Personal details

Are you an individual or a company?
Individual

Name:
Fran Sample

Date of Birth:
21 July 1981

Fourteen days after date of birth:
Tue Aug 04 1981 00:00:00 GMT+1000

Upload a copy of your driver's licence:
driver licence.png

What is your child's date of birth?
5 May 2015

Date the child turned 18:
5 May 2033

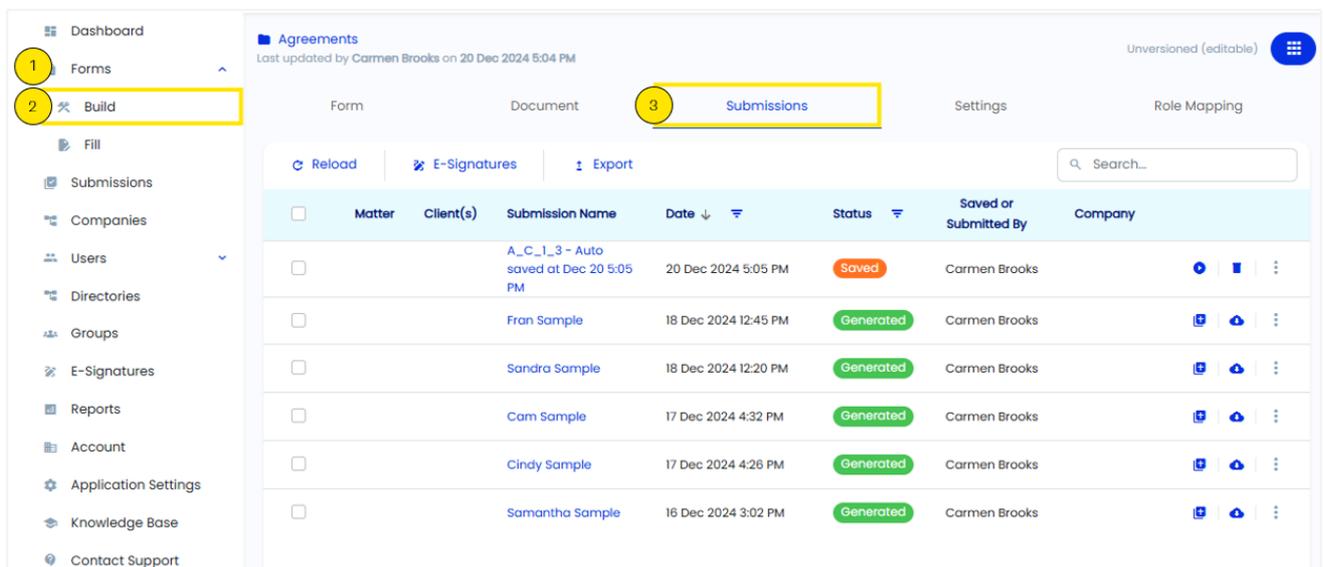**What is your preferred method of contact?**
Phone

Phone:
0405 222 444

What is you gender?
Female

What services are you interested in?
Support

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2. Viewing Submissions in the Form Builder

If a form is open in the form builder, the submissions associated with the form can be viewed from the **Submissions** tab.

1. Click **Forms** in the navigation menu.

2. Click **Build**. Select the required form from the **forms list** and open it in the form builder.

3. Click the **Submissions** tab. The details in this section are configured similarly to the Submissions List, but the items are related to the specific form.

2.1   Interacting with Submissions

1. When testing a form, use the reload button to refresh the submissions lists and access newly submitted forms.

2. Click **eSignatures** to open the eSigned documents collection in a new window.

3. Click **Export** to download a CSV file detailing the contents of the filled forms.

	Form		Document		Submissions		Settings		Role Mapping

| | ① ↻ Reload | ② ✏ E-Signatures | ③ ↕ Export | | | | | Q Search... |

	Matter	Client(s)	Submission Name	Date ↓ ▼	Status ▼	Saved or Submitted By	Company	
☐			A_C_1_3 - Auto saved at Dec 20 5:05 PM	20 Dec 2024 5:05 PM	Saved	Carmen Brooks		⊙ ▮ ⋮
☐			Fran Sample	18 Dec 2024 12:45 PM	Generated	Carmen Brooks		⬓ ☁ ⋮
☐			Sandra Sample	18 Dec 2024 12:20 PM	Generated	Carmen Brooks		⬓ ☁ ⋮
☐			Cam Sample	17 Dec 2024 4:32 PM	Generated	Carmen Brooks		⬓ ☁ ⋮
☐			Cindy Sample	17 Dec 2024 4:26 PM	Generated	Carmen Brooks		⬓ ☁ ⋮
☐			Samantha Sample	16 Dec 2024 3:02 PM	Generated	Carmen Brooks		⬓ ☁ ⋮

2.2   Auto-Saved Submissions

A form that has been automatically saved will have a submission name with details about the time the form was automatically saved.

	Matter	Client(s)	Submission Name	Date ↓ ▼	Status ▼	Saved or Submitted By	Company	
☐			A_C_1_3 - Auto saved at Dec 20 5:05 PM	20 Dec 2024 5:05 PM	Saved	Carmen Brooks		⊙ ▮ ⋮
☐			Fran Sample	18 Dec 2024 12:45 PM	Generated	Carmen Brooks		⬓ ☁ ⋮