

Create a form

Choose a template from the catalogue, review its documents and adopt it in the correct context.

6 min · Available with the Manage forms permission · 2026-09-21

Before you begin

- ✓ Open the correct scope before adopting the template.
- ✓ Prepare the details to insert into the form placeholders.

1

STEP 1 OF 3 · 2 MIN

Open Forms

Open Forms and check the working scope. Active forms contains current forms; Catalogue shows templates you can adopt.

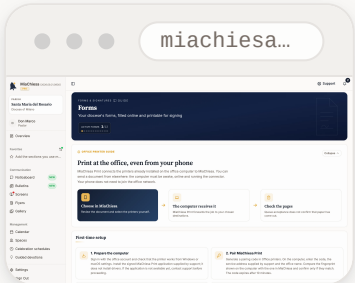


Fig. 1 The starting point separates active forms, catalogue, receipts, archive and submissions.

2

STEP 2 OF 3 · 2 MIN

Choose the template

Open Catalogue and compare the title, source, audience, document count and signature method. Preview opens the pack without creating anything.

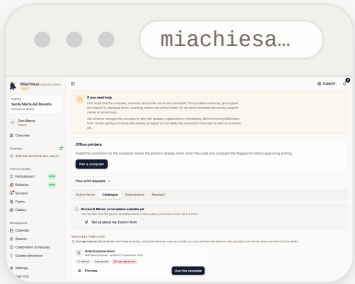


Fig. 2 Each card identifies its source, documents and signature method before adoption.

3

STEP 3 OF 3 · 2 MIN

Review the pack

Open Preview to read the included documents and where each one goes. Placeholders remain visible because scope details have not yet been applied.

Close the preview and select Use this template only after checking it: that button creates the form and opens the editor.

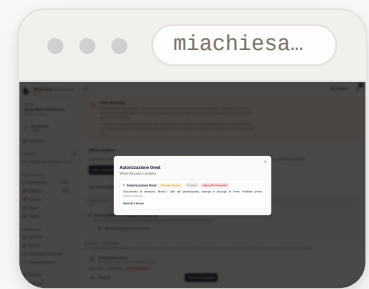


Fig. 3 The preview is read-only: the template has not been adopted and no form has been created.

What you have achieved

- ✓ You can review the complete pack before creating the form.

Troubleshooting

Use this template is unavailable



Check the Manage forms permission and that a scope is selected.