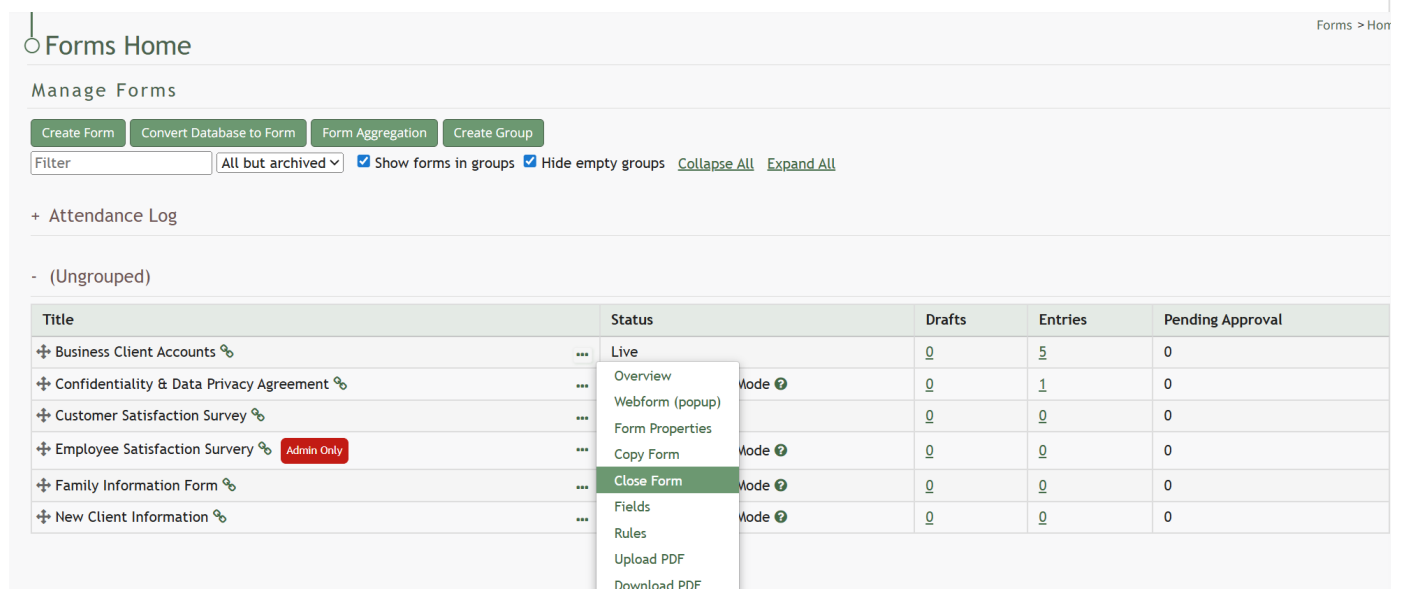


Archive a Form

To Archive a form, it cannot be live. You must close the form first.

How To: Close a Form

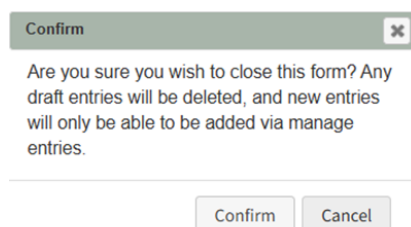
To close a live form, go to the Home Page of the Forms Module and click the three-dot icon to the right of the form that you wish to close. This opens the Form's context menu. Select "Close Form".



The screenshot shows the 'Forms Home' page. At the top, there's a 'Manage Forms' section with buttons for 'Create Form', 'Convert Database to Form', 'Form Aggregation', and 'Create Group'. Below these are filter options: 'Filter' (with a dropdown set to 'All but archived'), 'Show forms in groups' (checked), 'Hide empty groups' (checked), and links for 'Collapse All' and 'Expand All'. A '+ Attendance Log' link is also present. The main section is titled '(Ungrouped)' and contains a table of forms. The table has columns: Title, Status, Drafts, Entries, and Pending Approval. The forms listed are: Business Client Accounts (Live), Confidentiality & Data Privacy Agreement (Live), Customer Satisfaction Survey (Live), Employee Satisfaction Survey (Live, marked 'Admin Only'), Family Information Form (Live), and New Client Information (Live). A context menu is open for the 'Employee Satisfaction Survey' form, showing options: Overview, Webform (popup), Form Properties, Copy Form, Close Form (highlighted), Fields, Rules, Upload PDF, and Download PDF.

Title	Status	Drafts	Entries	Pending Approval
Business Client Accounts	Live	0	5	0
Confidentiality & Data Privacy Agreement	Live	0	1	0
Customer Satisfaction Survey	Live	0	0	0
Employee Satisfaction Survey	Live	0	0	0
Family Information Form	Live	0	0	0
New Client Information	Live	0	0	0

This opens the Close Form Confirmation Modal which states, "Are you sure you wish to close this form? Any draft entries will be deleted, and new entries will only be able to be added via manage entries."



The screenshot shows a modal window titled 'Confirm'. The text inside reads: 'Are you sure you wish to close this form? Any draft entries will be deleted, and new entries will only be able to be added via manage entries.' At the bottom, there are two buttons: 'Confirm' and 'Cancel'.

Select "Confirm" and an Update Status Modal appears stating, "The form is now closed."

Update Status



The form is now closed

Close

The status of the form will now show as closed in the Forms Table.

Forms Home

Forms > Home

Manage Forms

Create Form

Convert Database to Form

Form Aggregation

Create Group

Filter

All but archived



Show forms in groups



Hide empty groups

- (Ungrouped)

Title	Status	Drafts	Entries	Pending Approval
Branch Locations	Closed	0	2	0

To archive a closed form, go to the Home Page of the Forms Module and click the three-dot icon to the right of the form that you wish to archive. This opens the Form's context menu. Select "Archive Form".

Forms Home

Forms > Home

Manage Forms

Create Form

Convert Database to Form

Form Aggregation

Create Group

Filter

All but archived



Show forms in groups



Hide empty groups

Collapse All

Expand All

- Attendance Log

Title	Status	Drafts	Entries	Pending Approval
Attendance Log	Not Live - Preview Mode	0	0	0
Event Attendance Log	Not Live - Preview Mode	0	2	0

- (Ungrouped)

Title	Status	Drafts	Entries	Pending Approval
Business Client Accounts	Not Live - Preview Mode	0	5	0
Confidentiality & Data Privacy Agreement	Not Live - Preview Mode	0	1	0
Customer Satisfaction Survey	Not Live - Preview Mode	0	0	0
Employee Satisfaction Survey	Not Live - Preview Mode	0	0	0
Family Information Form	Not Live - Preview Mode	0	0	0
New Client Information	Not Live - Preview Mode	0	0	0

- Overview
- Webform (popup)
- Form Properties
- Copy Form
- Make form live
- Archive Form
- Fields
- Rules

Selecting "Archive Form" will open a confirmation modal stating, "Are you sure you wish to archive this form? Any draft entries will be deleted, no new entries will be added and the form will no longer be available to reference."

Confirm

Are you sure you wish to archive this form?
Any draft entries will be deleted, no new
entries will be able to be added and the form
will no longer be available to reference.

Confirm

Cancel

Select “Confirm” and an Update Status Modal will appear.

Update Status

The form is now archived

Close

Click the “Close” button and return for the Forms Home Page. The form will no longer be visible on the Home Page.

Revision #6

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