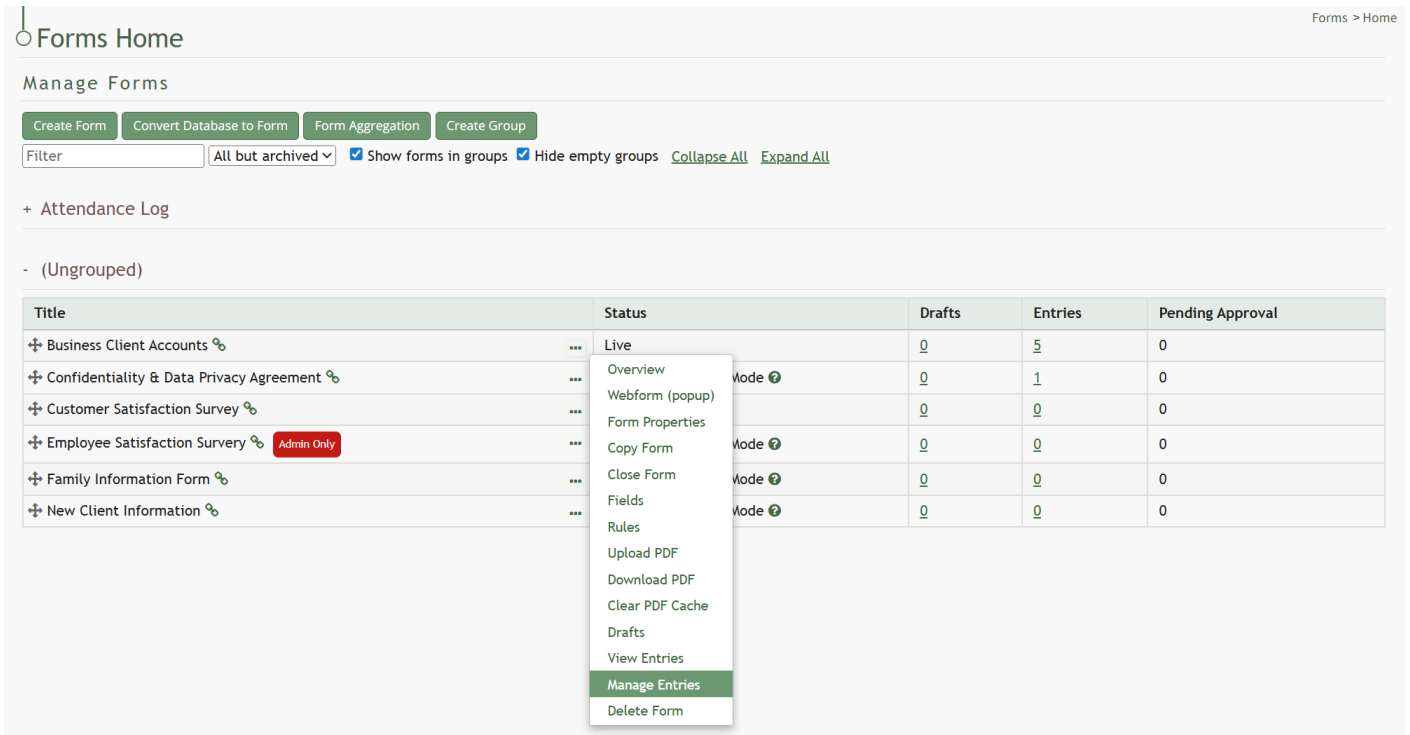


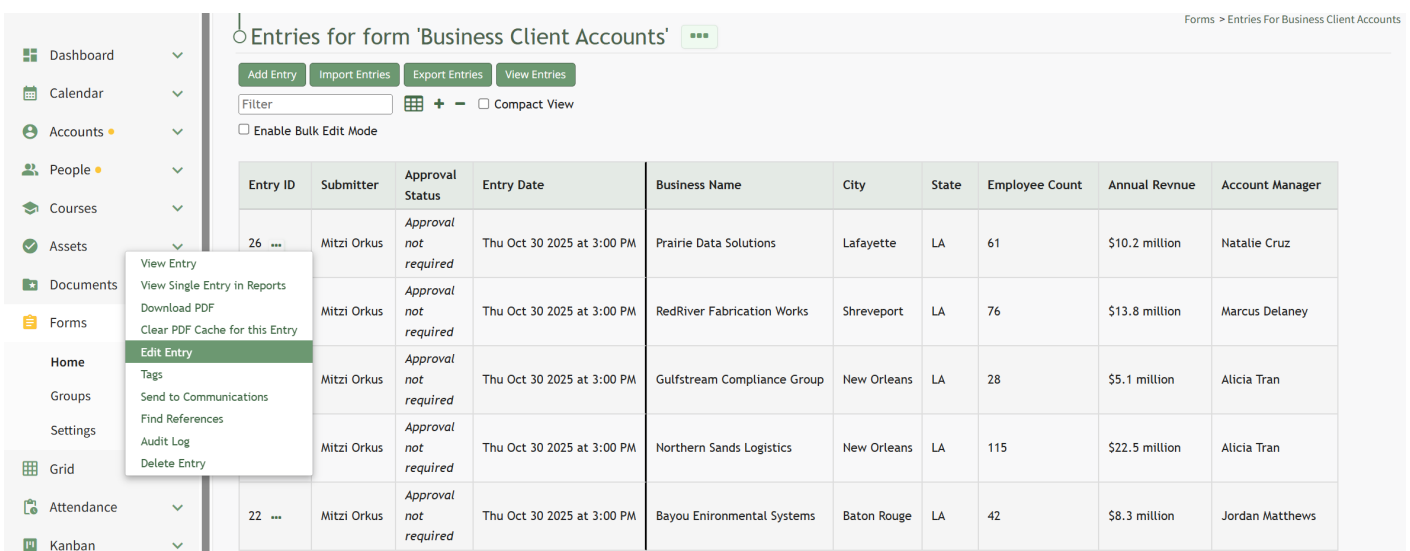
Edit a Form Entry

To edit a form entry, 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 edit an entry in. This opens the Form's context menu. Select "Manage Entries" from the context menu opening the Entries for (FORM NAME) Page.



The screenshot shows the 'Forms Home' page. At the top, there are buttons for 'Create Form', 'Convert Database to Form', 'Form Aggregation', and 'Create Group'. Below these are filter options: 'All but archived', 'Show forms in groups', and 'Hide empty groups'. A table lists several forms, including 'Business Client Accounts', 'Confidentiality & Data Privacy Agreement', 'Customer Satisfaction Survey', 'Employee Satisfaction Survey', 'Family Information Form', and 'New Client Information'. A context menu is open for the 'Business Client Accounts' form, listing options like 'Live', 'Overview', 'Webform (popup)', 'Form Properties', 'Copy Form', 'Close Form', 'Fields', 'Rules', 'Upload PDF', 'Download PDF', 'Clear PDF Cache', 'Drafts', 'View Entries', 'Manage Entries', and 'Delete Form'.

To the right of every Entry ID is a three-dot icon. Click the three-dot icon for the entry you wish to edit opening the Forms Entry Context Menu. Select "Edit Entry".



The screenshot shows the 'Entries for form 'Business Client Accounts'' page. It features a table with columns: Entry ID, Submitter, Approval Status, Entry Date, Business Name, City, State, Employee Count, Annual Revenue, and Account Manager. A context menu is open for the first entry (Entry ID 26), listing options like 'View Entry', 'View Single Entry in Reports', 'Download PDF', 'Clear PDF Cache for this Entry', 'Edit Entry', 'Tags', 'Send to Communications', 'Find References', 'Audit Log', and 'Delete Entry'.

Entry ID	Submitter	Approval Status	Entry Date	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
26	Mitzi Orkus	Approval not required	Thu Oct 30 2025 at 3:00 PM	Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz
	Mitzi Orkus	Approval not required	Thu Oct 30 2025 at 3:00 PM	RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
	Mitzi Orkus	Approval not required	Thu Oct 30 2025 at 3:00 PM	Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
	Mitzi Orkus	Approval not required	Thu Oct 30 2025 at 3:00 PM	Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
22	Mitzi Orkus	Approval not required	Thu Oct 30 2025 at 3:00 PM	Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews

Selecting "Edit Entry" from the Forms Entry Table opens the Edit Form Entry Modal.

Edit Form Entry #26



Business Name

Prairie Data Solutions

City

Lafayette

State

LA

Employee Count

61

Annual Revenue

\$10.2 million

Account Manager

Natalie Cruz

Make changes as desired to edit the entry and select the "Save" button.

Your edits will now show in the Forms Entry Table.

Revision #4

Created 2025-12-07 17:01:12 UTC by Mitzi Orkus

Updated 2026-06-08 15:01:32 UTC by Mitzi Orkus