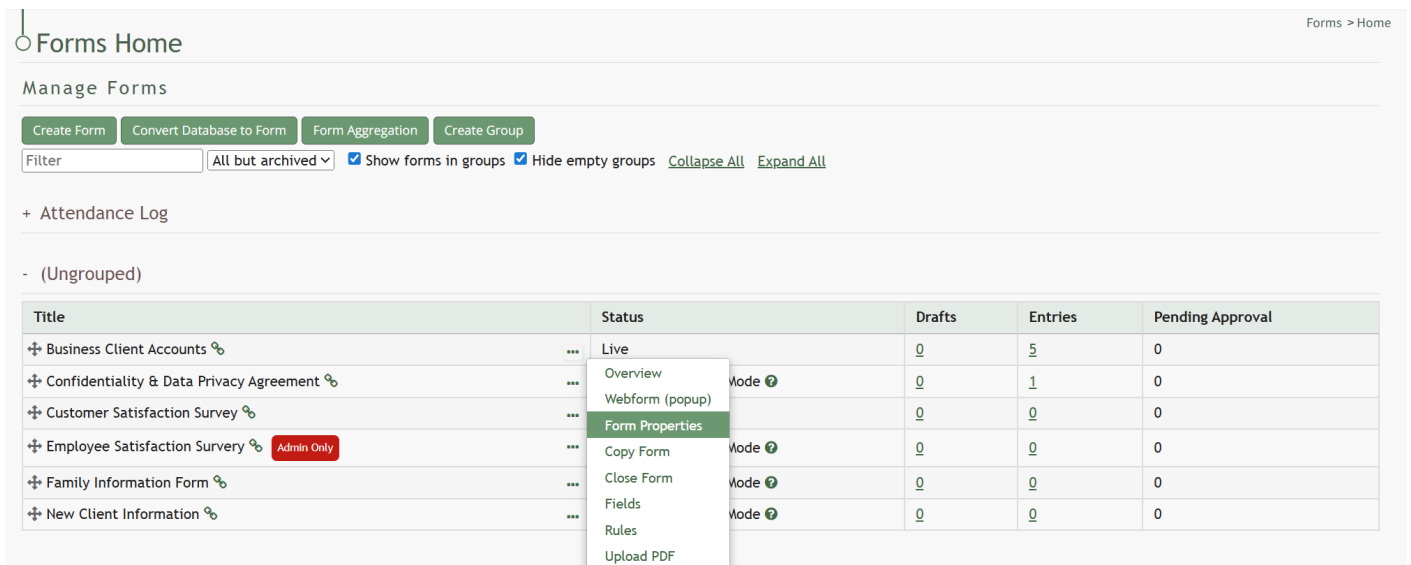


# Integrate Another Module Into a Form

To integrate another module into a form, go to the Home Page in the Forms Module. Click the three-dot icon to the right of the form you wish to edit opening the specific form's context menu. Select "Form Properties".



The screenshot shows the 'Forms Home' page. At the top, there's a breadcrumb 'Forms > Home'. Below it, a 'Manage Forms' section contains buttons for 'Create Form', 'Convert Database to Form', 'Form Aggregation', and 'Create Group'. There's also a filter input and several checkboxes: 'All but archived', 'Show forms in groups', and 'Hide empty groups', along with 'Collapse All' and 'Expand All' links. A '+ Attendance Log' link is visible. Below that, a '- (Ungrouped)' section contains a table of forms. The table has columns for 'Title', 'Status', 'Drafts', 'Entries', and 'Pending Approval'. A context menu is open over the 'Employee Satisfaction Survey' row, with 'Form Properties' highlighted. The table data is as follows:

Title	Status	Drafts	Entries	Pending Approval
+ Business Client Accounts	Live	0	5	0
+ Confidentiality & Data Privacy Agreement	Mode	0	1	0
+ Customer Satisfaction Survey	Mode	0	0	0
+ Employee Satisfaction Survey <span>Admin Only</span>	Mode	0	0	0
+ Family Information Form	Mode	0	0	0
+ New Client Information	Mode	0	0	0

This opens the Form Properties Modal.

### Form Properties ✕

Title \*  
Business Client Accounts

Notes

Tags  
Select Some Options

▼ **Basic Settings**

Group  
▼

Allow Public Entries

URL: <https://trainingground.kastrack.com/webforms/> \*  
Business-Client-Accounts

**PDF options for form entries that were not submitted via a PDF**

Use KAStrack Generated PDF

*When filling in an uploaded PDF for a form entry that was not submitted by PDF, you can use either the appropriate revision of the PDF (that was available at the time the form was submitted) or the latest revision of the PDF.*

Use the appropriate uploaded PDF revision

Allow integration with  
Select Some Options

*Note: The permissions in Advanced Settings only apply to users accessing this form via the forms module. When integrated with other modules, users automatically have access to view and add entries for relevant items in the module. Example: If no-one is allowed to view this form, but it is integrated to assets, then someone who can perform a task on an asset with this form attached can add an entry, and view any entries associated with assets they can access.*

► **Advanced Settings**

► **Form Styling**

Under the Basic Setting section, a dropdown menu follows “Allow integration With”. Select the modules you wish to integrate into the form.

Select “Save” and the form will now be visible within the modules selected.

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