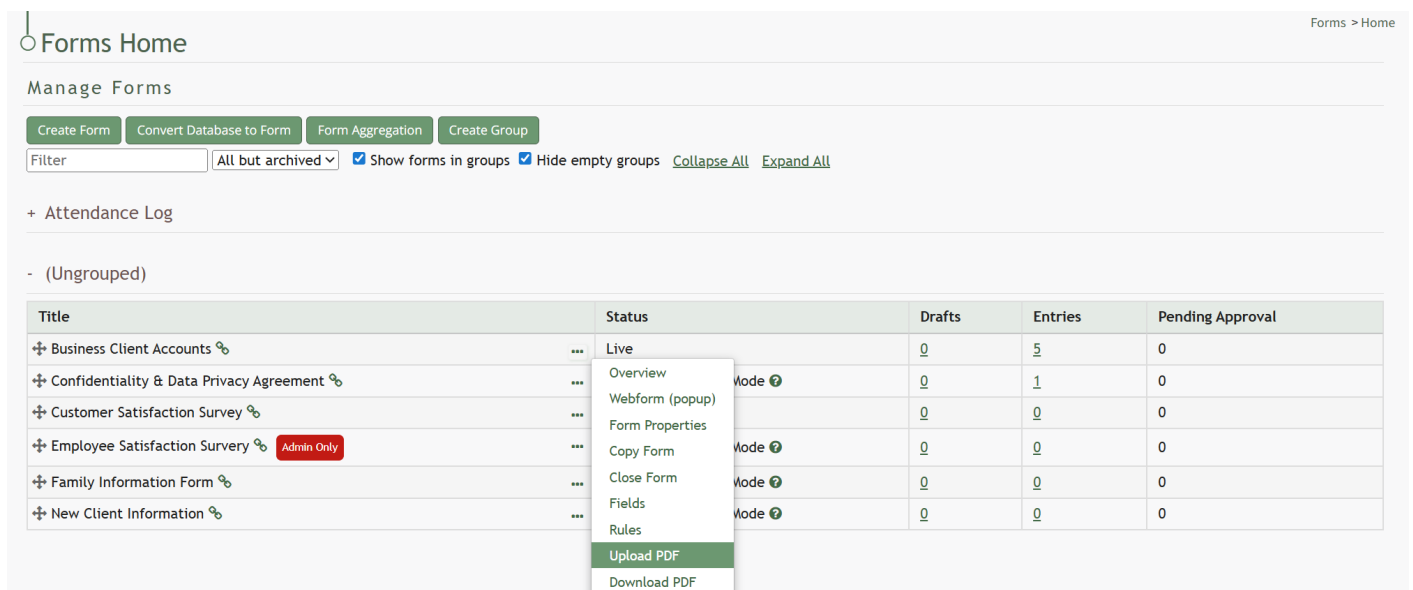


Upload a PDF Form (after Fields have been created)

Uploading a PDF allows an individual to create a customized output for form entries. In order to do so, the PDF must be created on Adobe Acrobat Pro (or comparable software) and have made use of form fields.

A PDF can be created and uploaded after a form is in use, however no additional fields can be created at this time.

To upload a PDF form to be used for form entry outputs, go to the Home Page of the Forms Module. Click the three-dot icon to the right of the form title opening the context menu and select “Upload PDF”.



The screenshot shows the 'Forms Home' interface. At the top, there are navigation buttons: 'Create Form', 'Convert Database to Form', 'Form Aggregation', and 'Create Group'. Below these are filter options: 'Filter', 'All but archived', 'Show forms in groups', 'Hide empty groups', 'Collapse All', and 'Expand All'. A section titled '+ Attendance Log' is visible. Below that, a section titled '- (Ungrouped)' contains a table of forms. A context menu is open over the 'Employee Satisfaction Survey' form, with 'Upload PDF' highlighted.

Title	Status	Drafts	Entries	Pending Approval
Business Client Accounts	Live	0	5	0
Confidentiality & Data Privacy Agreement	Overview	0	1	0
Customer Satisfaction Survey	Webform (popup)	0	0	0
Employee Satisfaction Survey	Form Properties	0	0	0
Family Information Form	Copy Form	0	0	0
New Client Information	Close Form	0	0	0
	Fields	0	0	0
	Rules			
	Upload PDF			
	Download PDF			

This will open the Upload PDF Form Modal.

Upload PDF Form for Business Client Accounts ✕

Note: Max file size is 524MB

No file chosen

Title *

Revision

Revision Date

Document is public

Document is a 360° photo

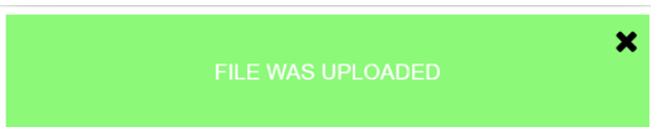
Document Owner(s) *

Select "Choose File" to retrieve the PDF from your personal device.

Input a title for the PDF or select the clickable "Use Filename" link to have the system use the filename as the title. The revision date will automatically show the current day, but can be altered. Select the appropriate checkbox if the document is to be public, or if it is a 360 degree photo.

You can select individuals or certification roles as the document owner(s).

Select "Save" and a confirmation modal will appear stating, "File was uploaded."



Revision #4

Created 2025-12-07 17:05:41 UTC by Mitzi Orkus

Updated 2026-06-08 15:15:13 UTC by Mitzi Orkus