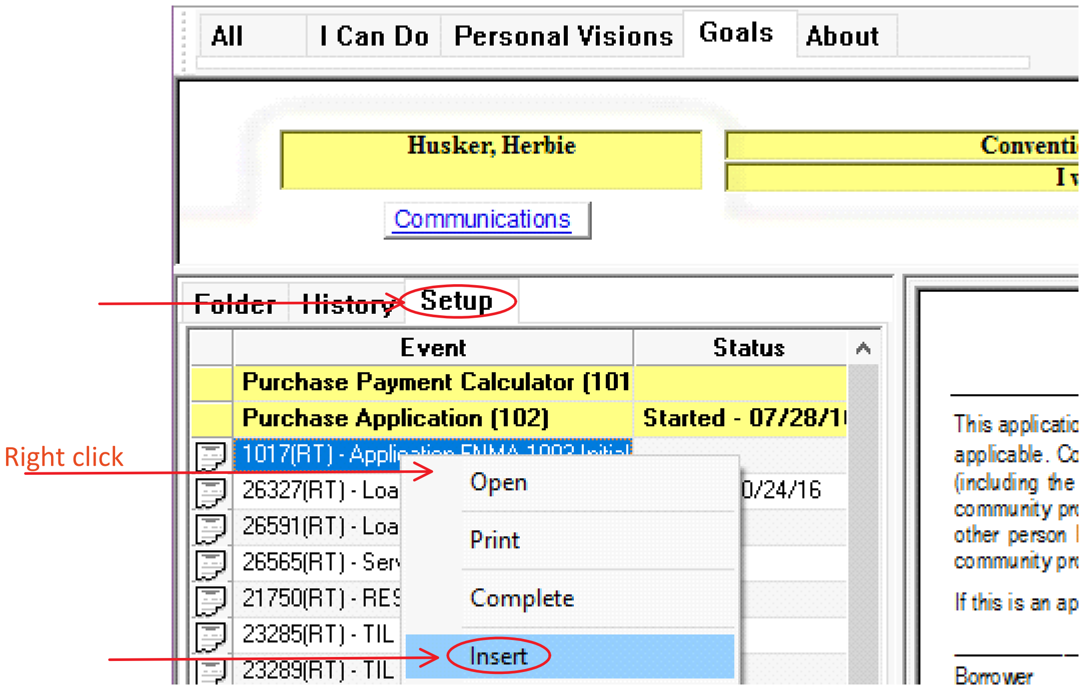
Inserting Forms

Wednesday, January 11, 2017 1:57 PM

Begin in a training or dummy loan, selecting the product or goal that you wish to add your form to. In the left had window, go to the "**Setup**" tab and ***right*** click anywhere <u>within the stage where you want the form to insert</u> and then select "**Insert**". In this example we are adding a form to the Purchase Application stage.



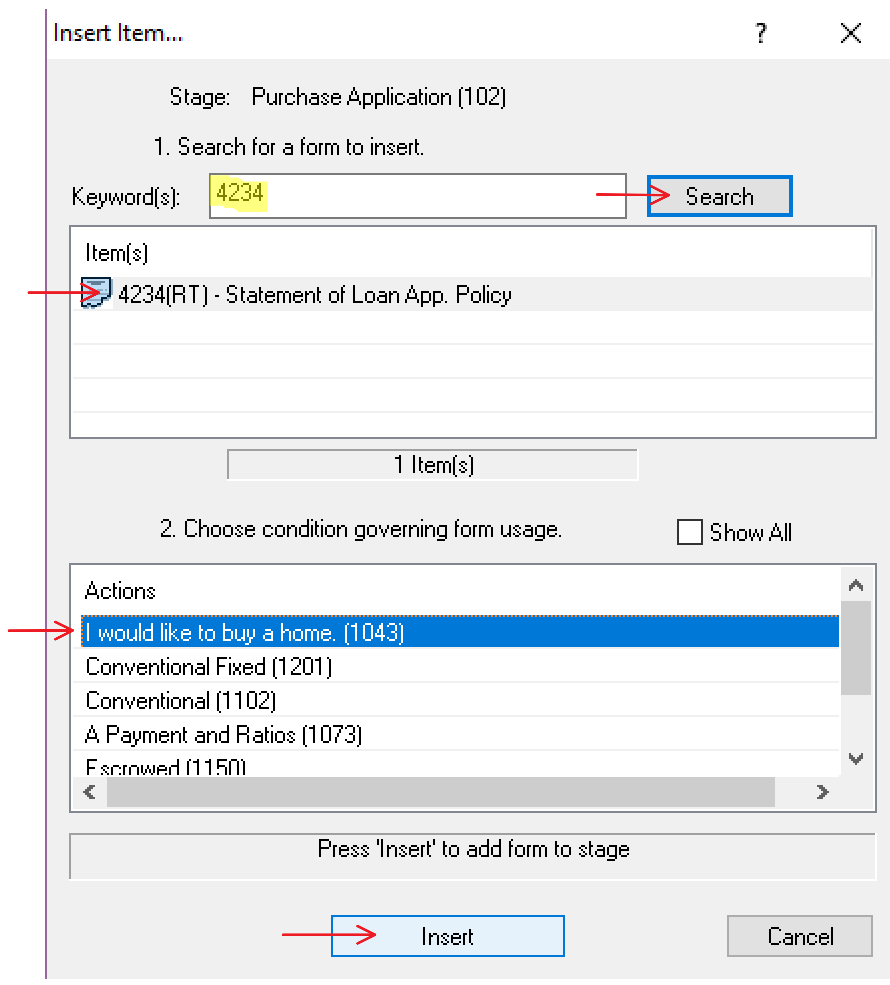
An "**Insert Item…**" dialog will load for you to identify the form and condition.

Type and enter the form number in the Keyword(s) box and then click "Search".

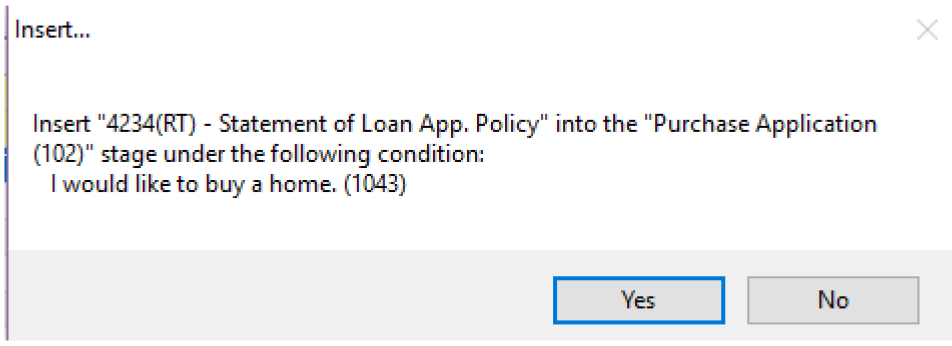
Click to highlight and select the Item in the top window.

Click the condition to identify when the form should appear. Consider whether you want the form to appear for the broader condition which would cover multiple types or, if you only want that form to appear in specific types.

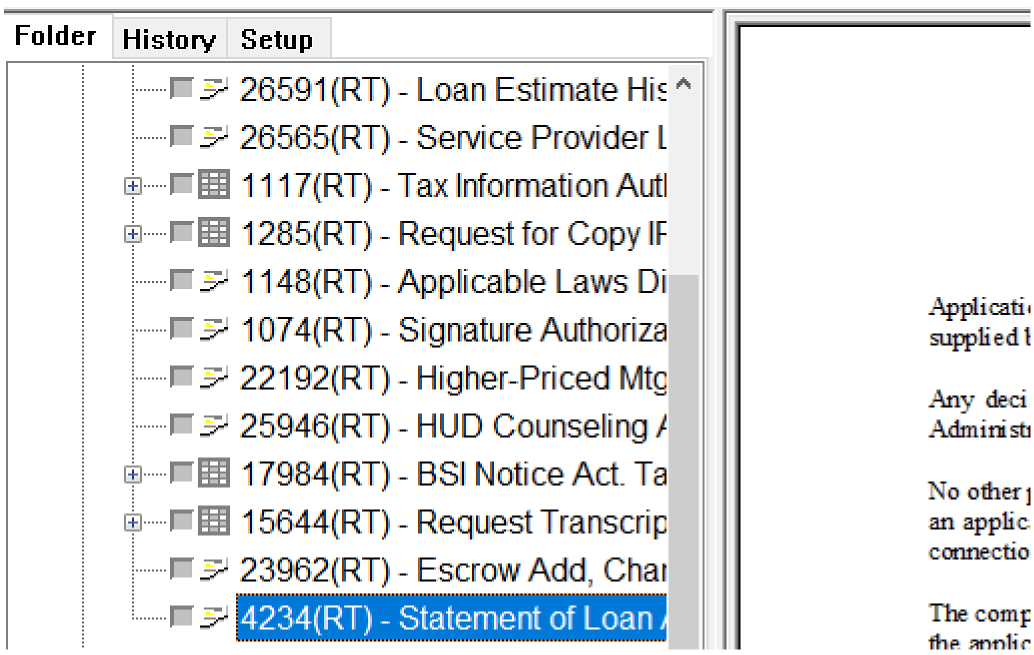
Click Insert.



A confirmation dialog will load for you to review the form number and conditions in which it will appear. Click "Yes" to insert.



Return to the "Folder" tab and verify the form now exists in your list of forms.



Refer to the help instructions on [how to reorder forms] if you wish to change the order.

Repeat the steps above in order to add the form to any/all applicable product types.