Template Administration

Download the PDF of this article.

In this Article

Related Articles

Overview

Templates are useful to speed up form creation or to help your users follow some guidelines or conventions when creating forms.

Requirements

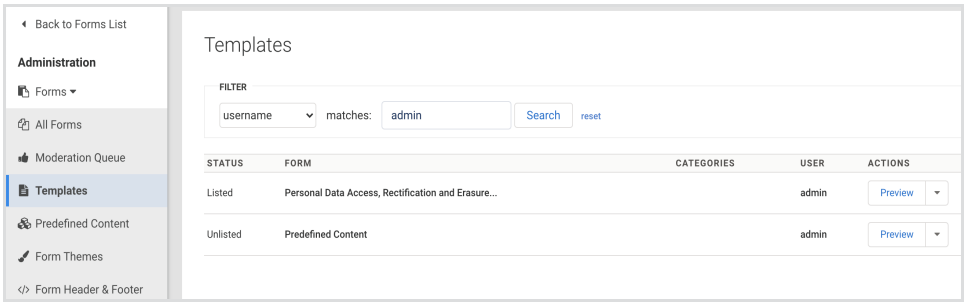
Team **Enterprise**

For information on upgrading, please contact our Sales Department at sales@formassembly.com.

Managing Templates

You can manage your templates by going to: **Admin Dashboard → All Forms → Templates.**

You may select templates to feature, or reject a template from the library using the "Remove from Library" link. Forms listed as templates are visible in the template library and can be used by any user. The form that is shared as a template remains usable under its owner's account.



Creating a Template

You can add forms as templates for your instance by going to: **Admin Dashboard → Forms →** ***select the form you want to use as a template*** **→ Edit Properties** and select **Listed as a Template**

An **administrator** may designate a form as a template.

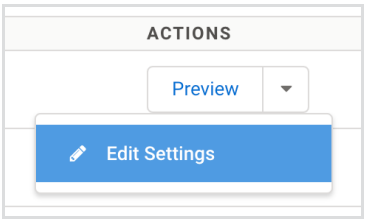
The **form creator** may make changes to the form at any time. Changes will affect new forms created from the template, but not existing forms (questions and sections present in the template are copied over when a new form is created).

Defining a Default Template

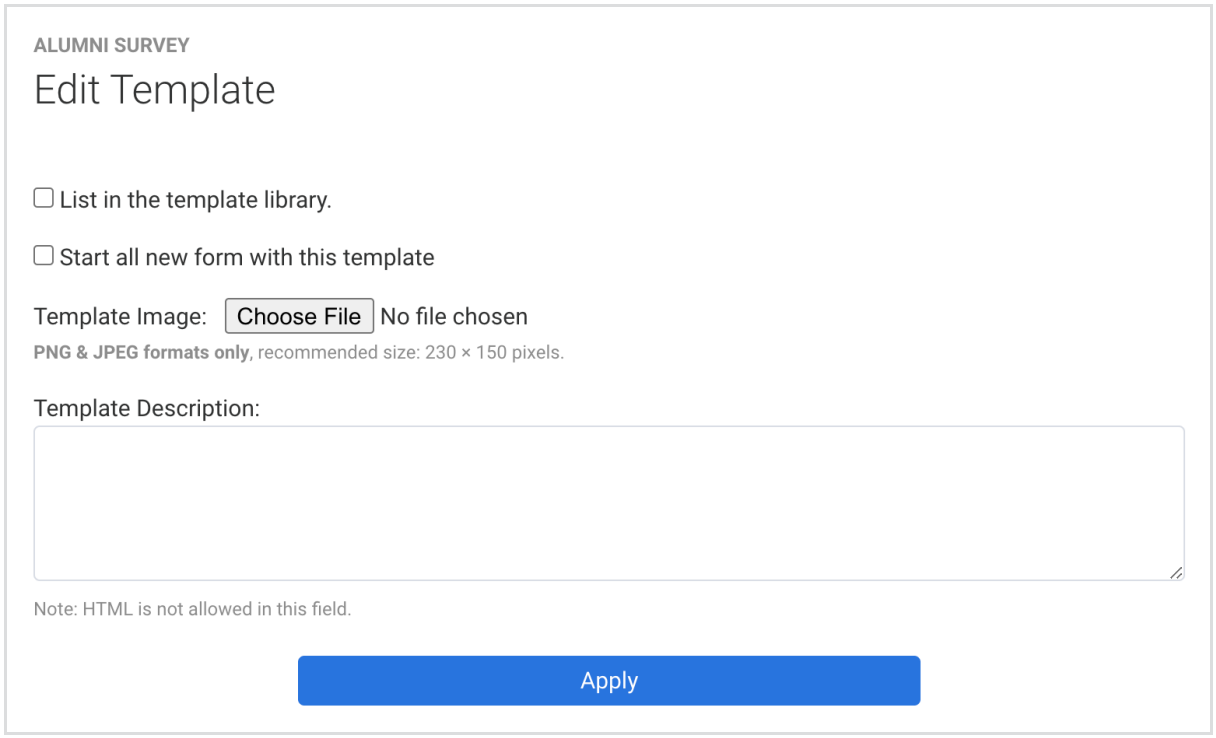
As an Administrator, you can select one template to be the default template for all forms. If no default template is set, all new forms will start without any styling (unless the form is created from a specific template).

To define the default template:

1. Find the form or use the search option on your **Templates** page.
2. On the right, expand the menu next to **Preview** and click **Edit Settings**.



3. From the Settings, you can choose to start all new forms with this template. You can also add any additional settings on this page.



Note: Setting a default template does not prevent a user from using a different template from the library.