

Build Forms in Seconds with the Template Library

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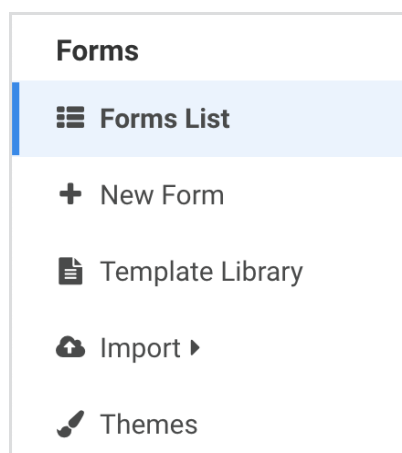
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Introduction

The Template Library is a valuable resource that showcases example forms that are provided by the FormAssembly team, or your FormAssembly administrator. Templates allow you to save time and streamline your form-building process. You can use the templates as they are, or they can be customized further to meet your form building needs.

Template Library

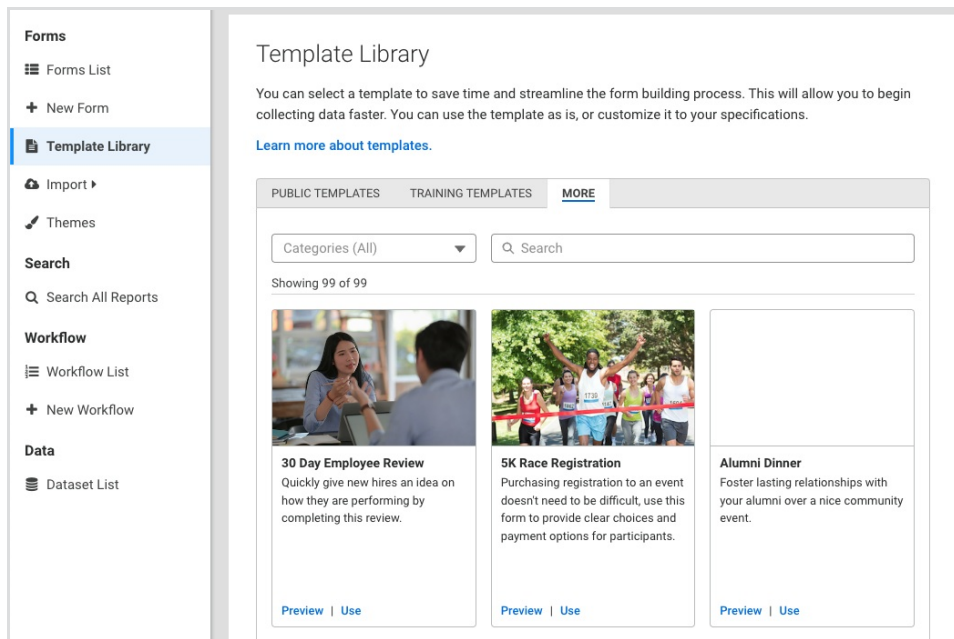
To find the template library, click the **Template Library** side navigation from the Forms List page.



Use a Template

To create a new form from a template:

1. Choose a template that best fits your needs.



2. **Preview** it first and customize it from there, or select **Use** to modify the form directly in the Form Builder.

3. **Save** the form to publish it and have it appear in your list of forms.

Template Search

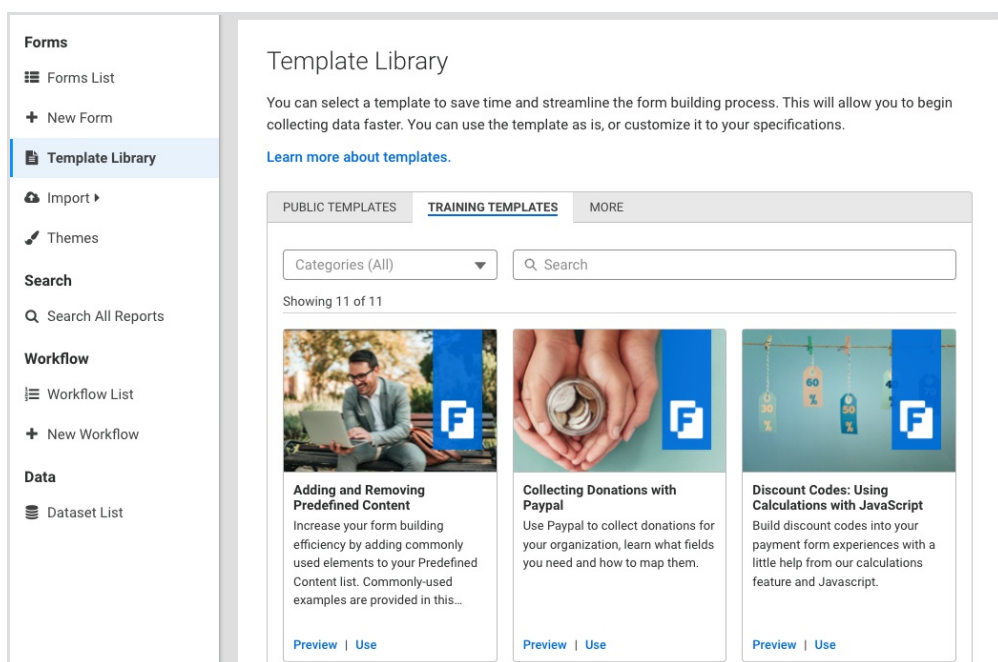
By using the search bar, users are able to locate specific templates within the library. Templates are also able to be filtered by selected categories. The following categories are currently available:

- Payment Connectors
- Salesforce
- Higher Ed
- Healthcare
- Education
- Compliance & Security

- Enterprise
- Non-profit
- Finance
- Human Resources (HR)

Training Guides

In your Template Library, you can select the "Training" tab to view a list of training guides provided by FormAssembly. These guides are forms that can be used to increase your FormAssembly knowledge and form-building skills! Save the form to your Forms List in the same way you would save a template. Once the guide appears in your list, you can follow the steps in the form to practice a particular skill. If you have any questions during the training process, please feel free to [reach out to our Support team](#) anytime.

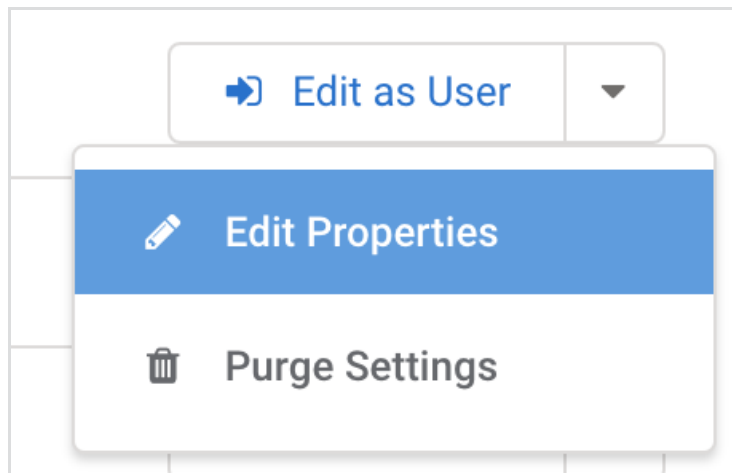


Administrator Templates

If you are an admin on a Team plan or higher, you can create templates to be added to your Templates Library.

Adding a Form to the Templates List

To add a form to the list of available templates, you can go to the **Admin Dashboard > Forms > All Forms** and locate the form using the search bar and filters. Once you have located the form you would like to turn into a template, open **Actions > Edit Properties**.



Scroll down until you see the **Listed as a Template** section and check the box labeled "Allow form to be used as a template to create new forms". When selected, the form is added to the Template Library as well.

LISTED AS A TEMPLATE
☐ Allow form to be used as a template to create new forms.

If you would like your users to be able to add their own forms to the Templates List, go to the **Admin Dashboard > Settings > User Roles** and select the User Role you would like to be able to nominate their own forms. In the Permissions for this User Role, check the following checkbox and then click "Apply":

☐ Can share form in the template library

Now, any users with this role will be able to open the Collaboration page on any of their forms and select to add their form to the list of available templates:

◀ Back to Forms List

Form

Summary

Build

View

Publishing

Responses

Options

Processing

Notifications

Connectors

Collaboration

WORKSHOP REGISTRATION ▾

Collaboration Options

TEMPLATES

ADD TO THE TEMPLATE LIBRARY?

☐ No

☒ Yes

Forms listed in the Template Library are available to all FormAssembly users. Your responses and processing options, however, **remain private**.

Please note that templates must be approved in order to be listed in the library. If you need to share your form with another user, use the 'Share' tab.

Apply

SHARING OPTIONS

This form is not currently shared.

Adding Templates to the Template Library

Forms added to the Templates list can be added or removed from the Template Library. To manage the templates, go to **Admin Dashboard > Templates**.

◀ Back to Forms List

Administration

Forms ▾

All Forms

Moderation Queue

Templates

Predefined Content

Form Themes

Form Header & Footer

Users ▶

Datasets

Announcements ▶

Logs ▶

Templates

FILTER

username ▾ matches: templates_library

Search reset

STATUS	FORM	CATEGORIES	USER	ACTIONS
Listed	30 Day Employee Review	Human Resources (HR)	templates_library	<div>Preview ▾</div>
Listed	5K Race Registration	Non-profit	templates_library	<div>Preview ▾</div>
Listed	Alumni Survey	Education	templates_library	<div>Preview ▾</div>
Listed	Apply for a Position	Human Resources (HR)	templates_library	<div>Preview ▾</div>
Listed	Appointment Request	Enterprise	templates_library	<div>Preview ▾</div>
Listed	Authorize Payment Form	Payment Connectors, Finance	templates_library	<div>Preview ▾</div>

Search for and edit any template listed. When editing a template, you can add a Template Image and a Description that will appear in the Template Library. You can also check or uncheck the **"List in the template library"** checkbox to add or remove the template from the Library.

Edit Template

☒ List in the template library.

☐ Start all new form with this template

Template Image:

Choose File

 No file chosen

PNG & JPEG formats only, recommended size: 230 × 150 pixels.

Template Description:

test template

Note: HTML is not allowed in this field.

Apply

Note: When adding a form to the Template List, it will also be automatically added to the Template Library.

FAQ

- If I list a form as a template and then update the form, does the template also update?
 - Forms that have been listed as a template can be updated and saved (changing the theme, for example), and the template will also be updated with no further action needed outside of saving the original form.
- What if I archive a form that is listed as a template?
 - If a form is archived when it is still listed as a template, the template will remain in the template library.
- What if my form, which is marked as a template, expires?
 - If a form is marked as expired in the Admin Dashboard > All Forms > Edit Properties and is also listed as a template, then it will be removed from the template library (this can be undone).
- If the owner has been deactivated, what happens to a template?
 - If a user who has been deactivated had a form that was listed in the template library, the template will be removed from the template library.
- Can I list a form as a template if it's used in a workflow?
 - Forms used in workflows can be listed as templates. However, they will NOT carry over the workflow to the template. Only the singular form will be listed.
 - In addition, a form that was created from a template can be used in a Workflow.
- What if I clone a template?
 - A cloned form will NOT carry over any settings, datasets, or workflows. Only the form itself.
 - A cloned form can also be listed as a template.
 - A cloned form can still be used in a workflow when listed as a template, just like the original form.
- Can templates be moderated?

- Yes, forms that use a template that contains sensitive information like credit card data can be sent to the moderation queue.
 - What happens if I transfer a form using the Form Transfer Tool?
 - Forms created from a template and then transferred through the Form Transfer Tool will behave the same as any other form transferred.
 - After being transferred, you will need to mark the form as a template again if you would like the form to be an available template in the new account.
 - The form will live in both the new location and the original location.
 - Themes and connectors will be transferred, but form settings, notification tabs, and response data will not. For a full list of what will and will not transfer, [please refer to the Form Transfer Tool documentation](#).
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