How To: Apply a Form Template

This tutorial will demonstrate how to apply a form template to a job. When a form template is applied to a job, specified merge fields will auto-fill with job specific information and can then be saved to the job under attachments.

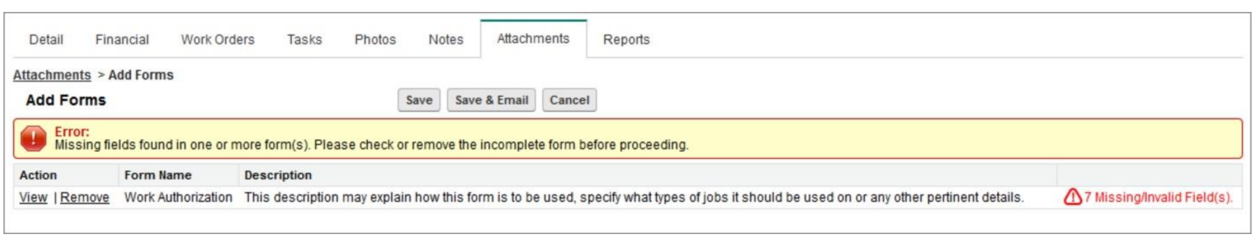
Apply a Form Template

1. Log in to the JobCheck Web Desktop as any user.
2. Open the job that you will be working on.
3. Click *Attachments*.
4. Select *Add Forms*.
5. Select the form you would like to apply → Click *Next*.
6. Click View to see a preview of the form with merge fields auto-filled.
7. Choose to *Save* or *Save & Email* the form.

All merge field data that is referenced in the form template must be existing/populated in the job for the form template to apply correctly.

When Form Errors Occur

If any of the form data is missing from the job file, you will receive an error message referring to missing fields.



1. Click *View* to see what data will need to be updated in the job prior to applying the form template.
2. Make any necessary changes/updates to the job file.
3. Return to *Attachments* to try again.

For more assistance with applying forms, please contact support at 1-877-277-9933.