How do we create a form with Templates

1. Overview

Creating a form using templates allows admins to quickly build forms in Bsharp Converse by using pre-defined structures. Templates help standardize form creation across different use cases while allowing edits before the form is finalized.

2. When to Use

Use this option when:

- You want to create a form using an existing structure
- You need standard forms for sales, HR, education, or marketing use cases
- You want to avoid creating forms manually from scratch
- You want to edit a pre-built form before assigning it to users

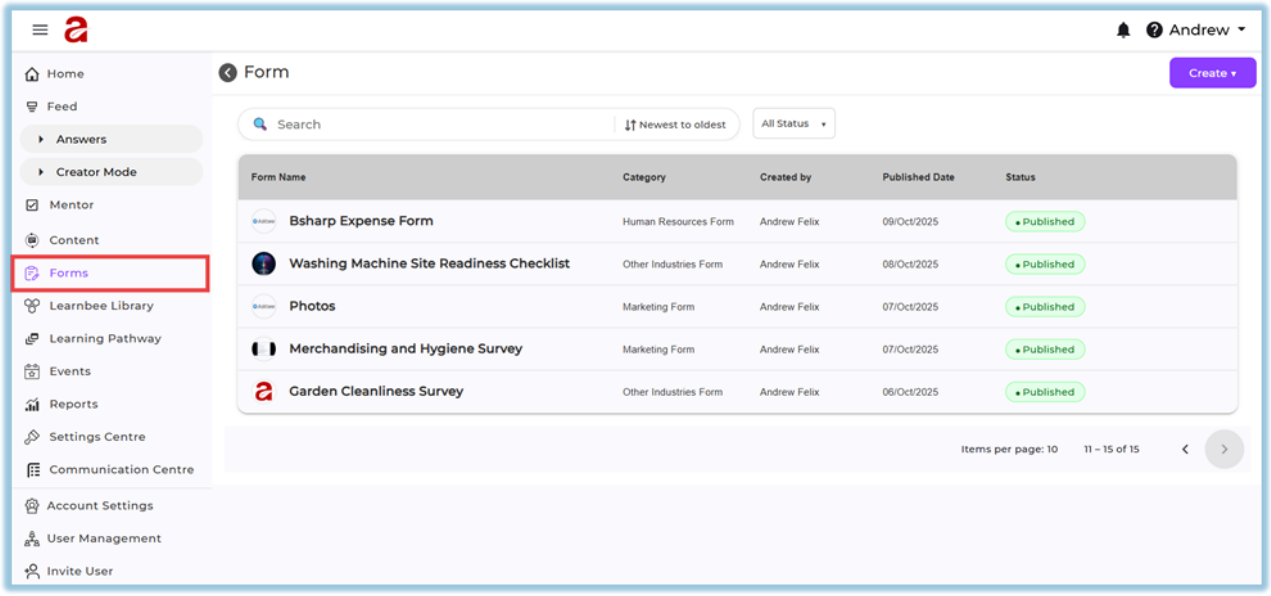
3. Concepts

- **Forms** – Data collection items created for users
- **Templates** – Pre-built form structures available by category
- **Form Categories** – Groupings such as Sales, Education, HR, Marketing
- **Form Builder** – Editor used to review and modify the template
- **Save** – Action used to store the created form

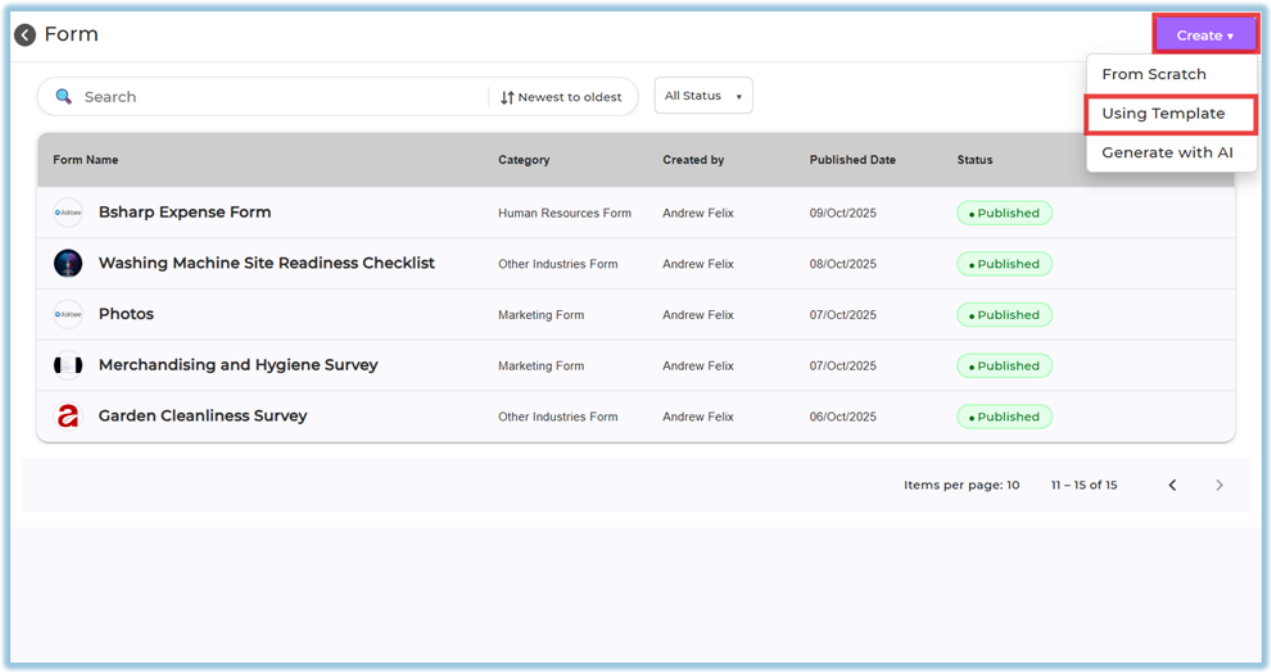
4. Set Up Guide

1. Open the menu and go to **Forms**.

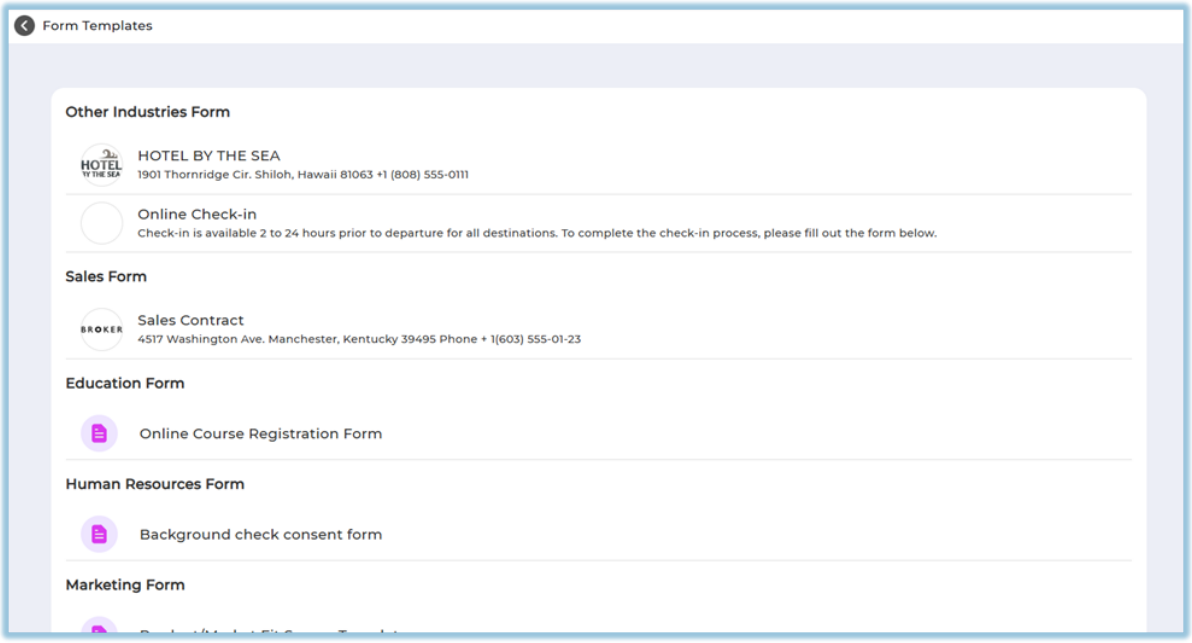
   https://converse.bsharpcorp.com/form_builder



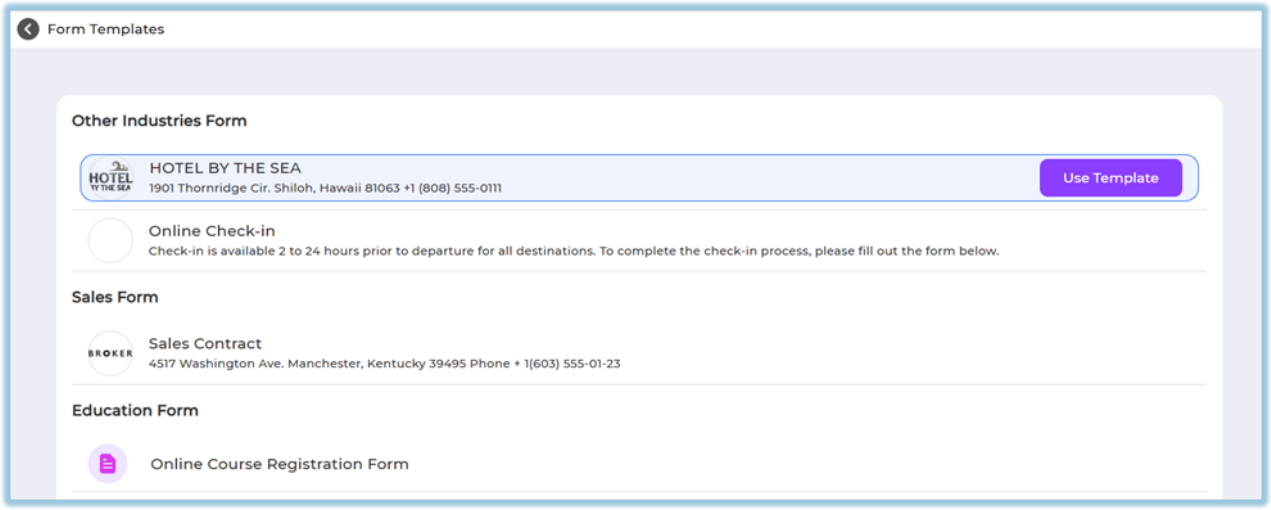
2. Click **Create** on the top-right corner.
3. Select **Using Template**.



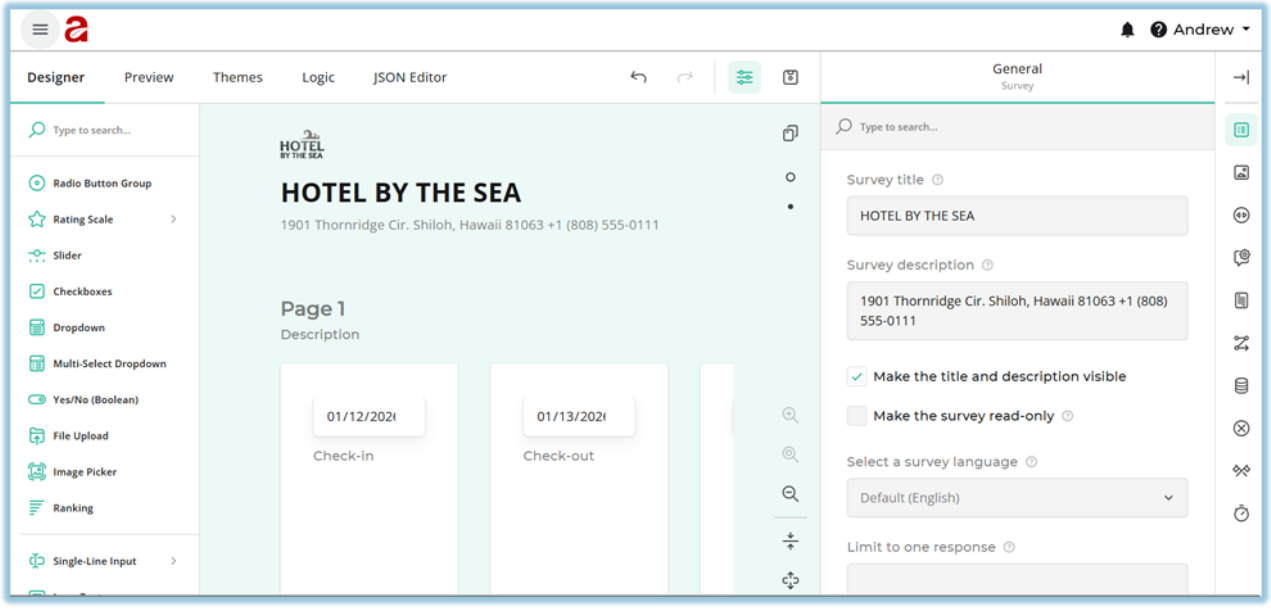
4. View the available template categories such as:
   - Other Industries Form
   - Sales Form
   - Education Form
   - Human Resources Form
   - Marketing Form



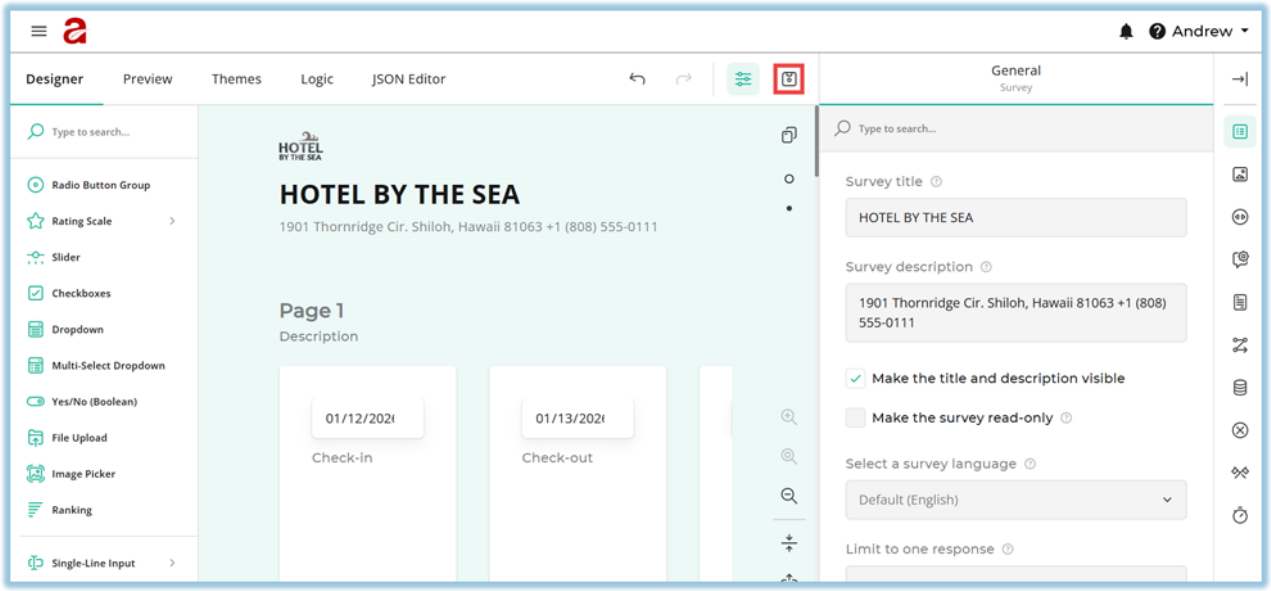
5. Choose a required template and click **Use Template**.



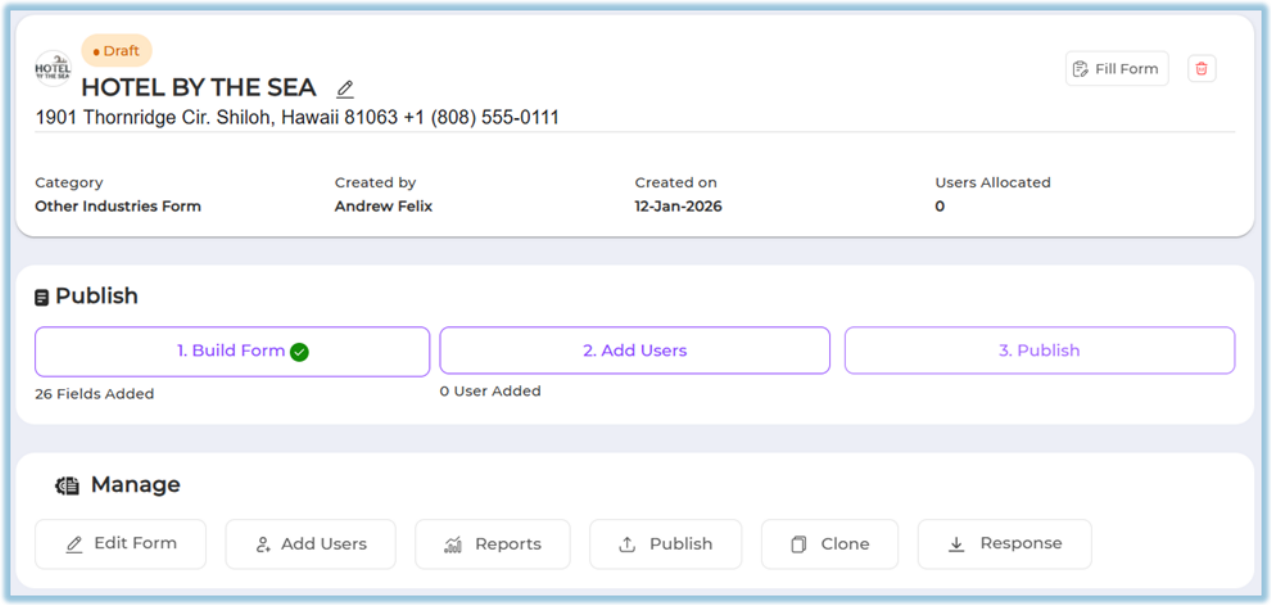
6. Review the form structure created from the template.
7. Edit the form fields if required (add, remove, or modify fields).



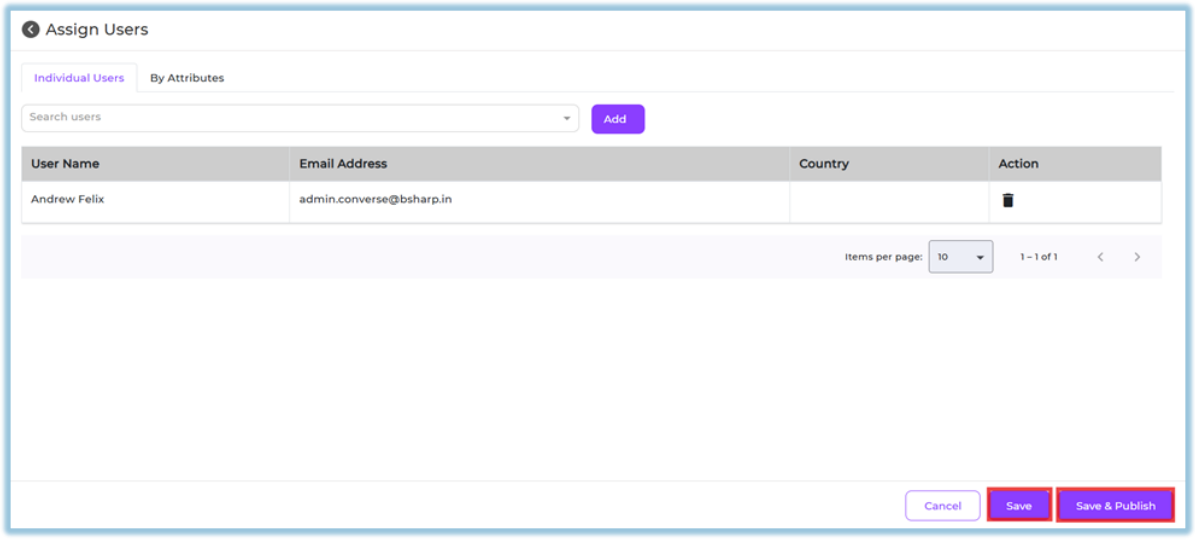
8. Click **Save** to save the form as a draft.



9. After saving, the form appears in the **Forms** list with **Build Form** completed.



10. Open the saved form and select **Add Users**.
11. Add users using one of the following methods:
    - **Individual Users** – select and add specific users
    - **By Attributes** – select attribute groups or create new attribute rules



12. Click **Save** to keep the form editable, or **Save & Publish** to publish the form.

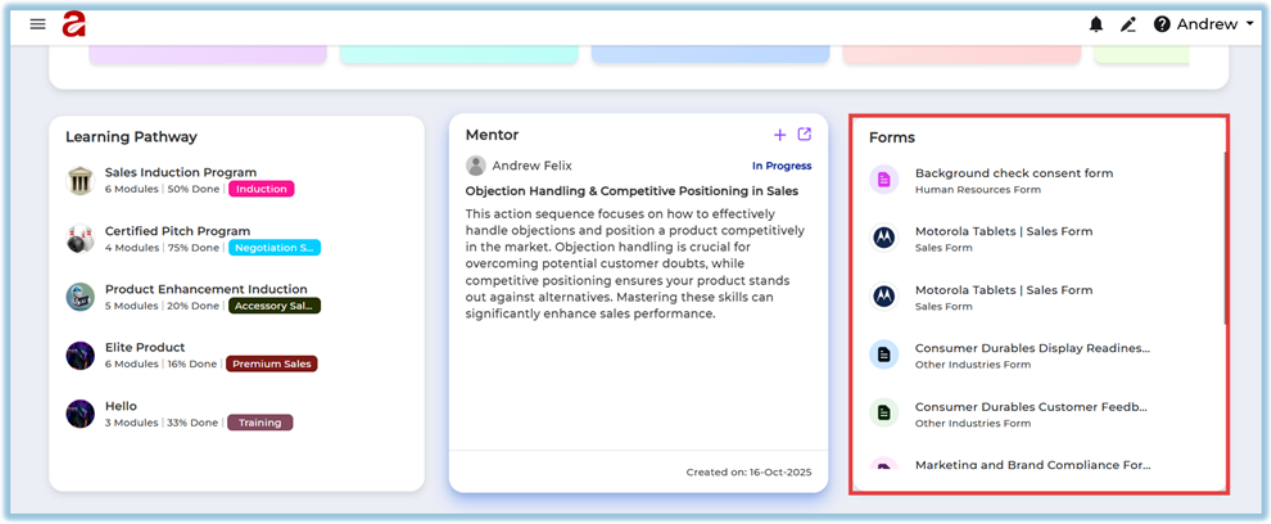
Note:

- Once a form is published, it **cannot be edited**.
- Saving without publishing allows you to return and edit later.

5. User View

If the form is assigned to users, it appears on the **Home page**.

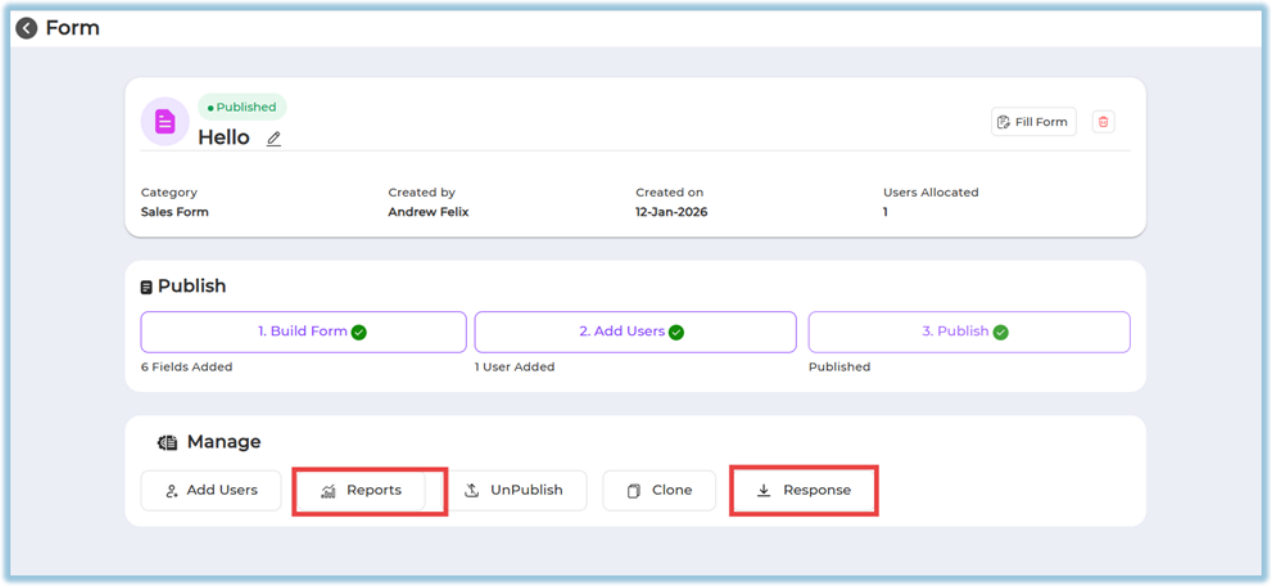
- Users scroll down on the Home page.
- Forms are visible under the **Forms** section.



- All assigned forms are listed in this section for easy access.

6. Reporting

- Form responses can be viewed after the form is published.
- Reports and responses are accessible from the **Manage** section of the form.
- Downloaded responses are available once users start submitting the form.



7. Best Practices

- Review and finalize all form fields before publishing
- Use templates to maintain consistency across teams
- Assign users carefully before publishing to avoid rework
- Save the form as draft if further edits are expected

8. Related Links / FAQs

Q: Can I edit a form after publishing?
No. Once published, the form cannot be edited.

Q: Where can users find assigned forms?
Users can find assigned forms on the Home page under the Forms section.

Q: Can I add users after publishing?
Yes. Users can still be added after publishing.

Q: What actions are available after publishing?
You can add users, unpublish, clone the form, view reports, and download responses.

9. Version Notes

Last Updated: 12 Jan 2026

Revision #9
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