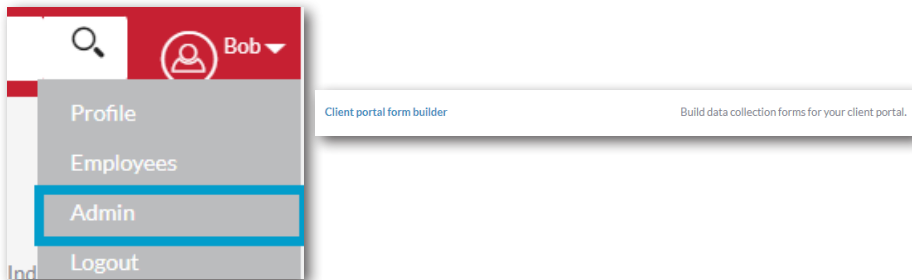


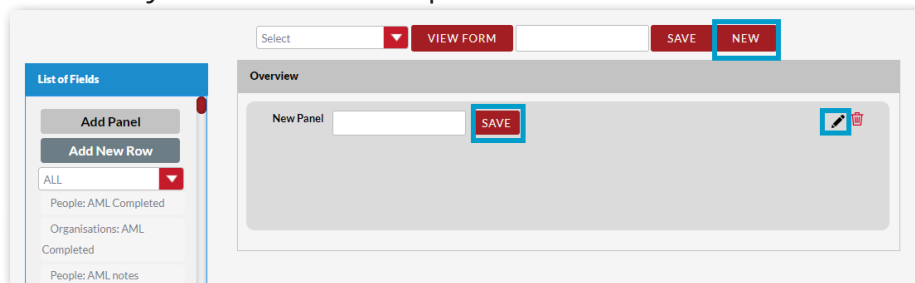
Visit support.fibrecrm.com for more info or contact your CRM Manager

Creating Client Take On Forms

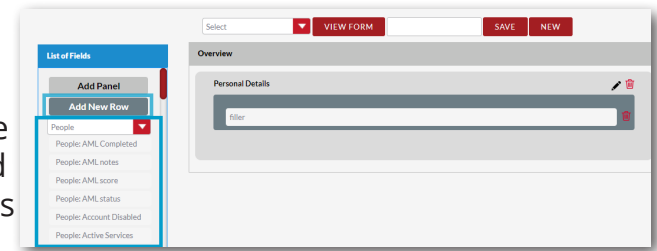
1. To be able to create a new Client Portal Take On form you need to be an admin user of the CRM. To create a form navigate to your username in the top right hand corner and in the drop down menu select **Admin**. Then scroll down to the **FibreCRM Modules** section and there select **Client Portal Form Builder**.



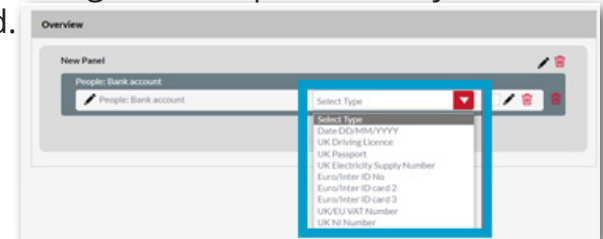
2. To create a new form press **New**. A panel will then be created. To build the form, first select the **Pen** icon to name the panel, each panel will be a section of the form for example; Driving Licence and then select **Save**. Use the **Pen** icon at anytime to rename a panel if needed.



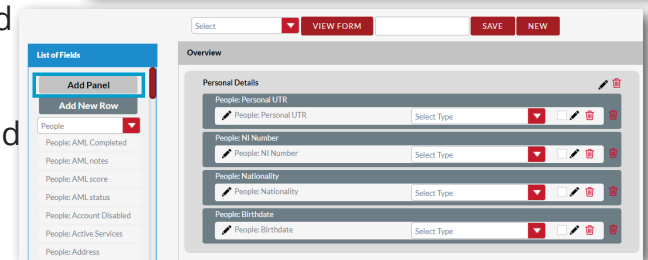
3. To add rows on a panel select **Add New Row** from the left hand side column. You can then choose your fields from the left hand column and drag them across to sit inside the row. You can add multiple rows to a panel.



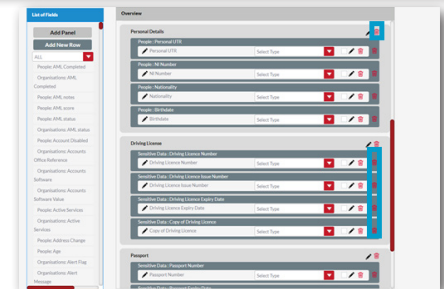
4. Next to each text field you will be given a dropdown that you could use to format the field. For example; a date field or a passport number. You do not have to select anything, and this list can also be added to if you want a specific format.



5. To add a new panel and row select **Add New Panel** on the left hand side this will add a new panel and row. You can drag and drop panels and rows to move them around the form.



6. The final results of the form will look better if you keep related fields in their own panel for example; Address, Personal Details, Driving Licence. Use the **Bin** icons to delete panels or rows.



7. Once you are happy with your form, name the form in the box at the top of page and select **Save**.

