



Saving Forms Reference Guide

This guide walkthroughs how to save Forms and Form Suites for frequent use

Saving Forms for Frequent Use

AddVantage allows you to save pre-filled QForms and Form Suites for frequent use, reducing the amount of time spent filling out forms with the same information. For example, if you have a client that regularly does ad hoc ACH disbursements to a beneficiary, you can have an ACH disbursement Form Suite saved and pre-filled with all the common information, and then simply change the amount being disbursed.

Select the form you want to use and fill out all fields based on your need. Any field you expect to change later, such as the **Amount** or **Transaction Description**, you may leave blank. **You can always edit pre-filled values on saved forms when you use them later!**

Once the form is filled out as needed, **go to the last page of the form** by clicking **Next** and then click **Save** at the bottom of the page – **Save** only shows up on the last page of the form!

SLOA APPROVED DATE 5 (32) [dropdown menu]
SLOA APPROVED BY 5 (33-1) [text input field]

[Queue] [Preview] [Clear] [Save] [Cancel]

A pop-up window will appear to let you name your saved form.

Enter an easy to recognize identifier in the **Form Suite Name** field – this is what will display to locate the form in AddVantage

Save Form Suite 'Client Initiated-OnPlatformCustody-ACH Adhoc-Donor IPS' As

Form Suite Name [JOHN VERMONT - BOA BANK]

Description [ACH AD HOC REQUEST]

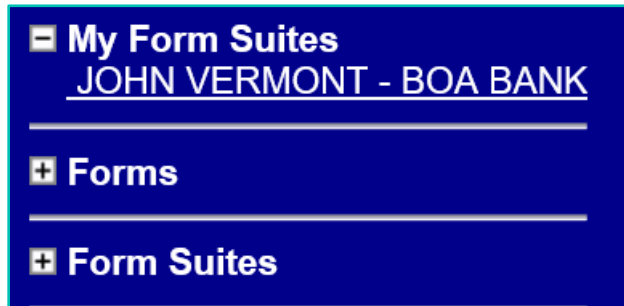
[OK] [Cancel]

Description can be used to provide a more detailed description for the saved form, such as the type of disbursement

After clicking **OK** to save the form, click to a different menu in AddVantage other than **QForm** (such as Investment or QMan) and then click back into **QForm** – you must exit and reenter the **QForm** menu to 'reset' it and see your newly saved form.



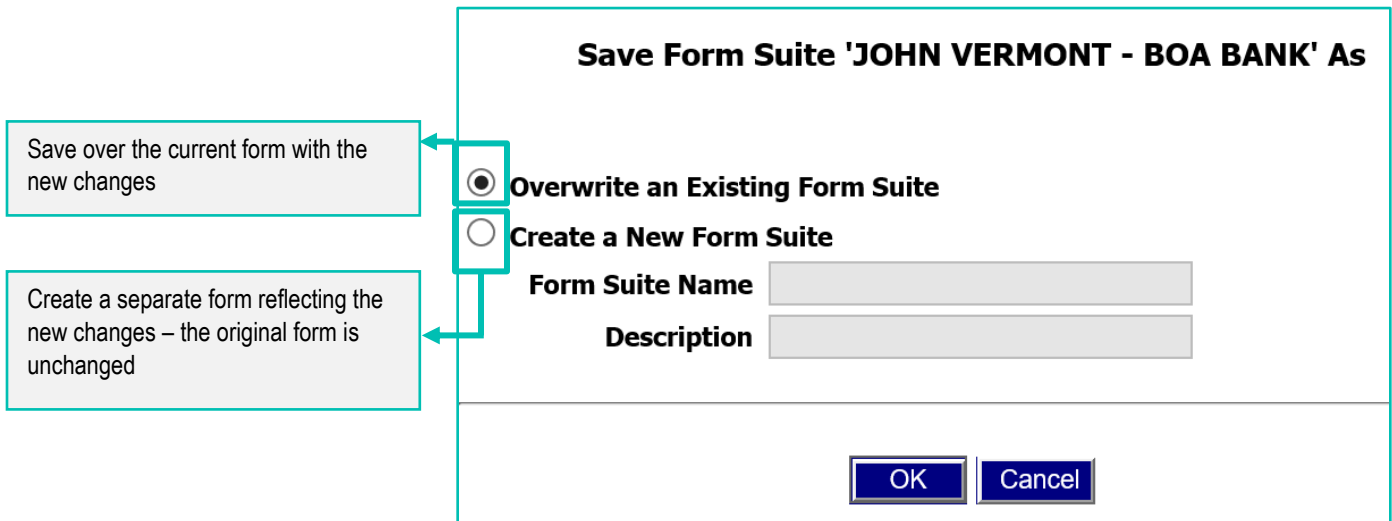
After resetting the **QForm** menu, you can locate it on the left side of the screen in either **My Forms** or **My Form Suites** respectively. Click on the **Form or Form Suite Name** to begin using your saved form.



If you ever need to edit a saved form, simply open it as shown before, then adjust as needed and go to the final page of the form to click **Re-Save**.

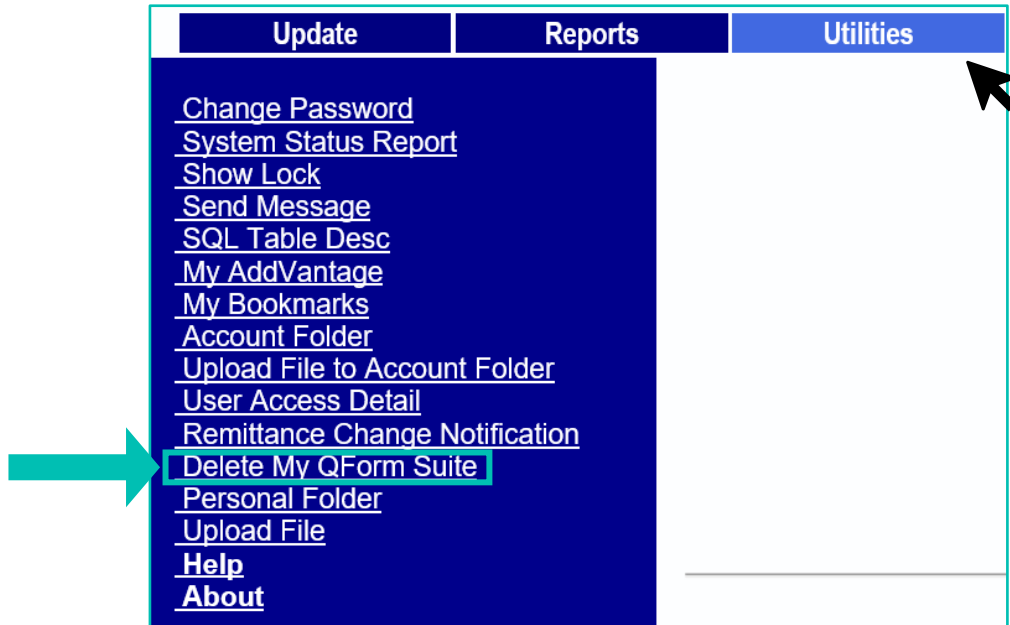


A new pop-up window will appear asking to either overwrite the existing saved form to update it with your changes or to simply create a new form based on the changes. If you select the latter option, you will create a new **Form Suite Name** and **Description**.





Finally, if you need to delete and saved forms you can easily do so from the **Utilities** menu. Once in **Utilities**, select either **Delete My QForm** or **Delete My QForm Suite**, respectively.



A new window opens allowing you to see a list of all your saved forms, which you can then select and click **OK** to delete the saved form.

