

Creating Favorite Forms Bundles in Docupace

Let our independence ignite yours." $\space{-1.5mu}$

My Favorite Forms is the solution to Groups within Laserapp allowing the user to create frequently used forms bundles for ease of selection when creating future Work Items.

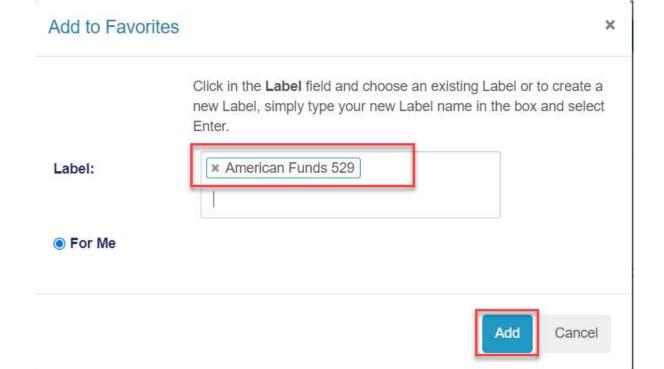
Search for the Forms

From the Form Library, utilize the Search feature on the left-hand side and enter criteria (e.g. company or other keyword) and click Search. You can also search by multiple companies at the same time.

Select checkboxes in front of the forms needed for that group (e.g. American Funds 529) and the click Add to Favorites.

✓ Select		X Cancel		Create New Add to		T avonico				
)	Co	mpany	Form Type	Form Name	Form Category	Form Provider	Version Date	Revision Date	Page
			AMERICAN FUNDS	New Account	COLLEGEAMERICA ACCOUNT APPLICATION (DIGITAL)	College Planning	Quik!	05/01/2021	05/24/2021	8
~		FUN	ERICAN		COLLEGEAMERICA ACCOUNT CHANGE REQUEST	College Planning	Quik!	01/01/2021	06/04/2021	6
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This allows the user to create a Favorite Bundle and name the Label.



In the future, choose Search and search by My Favorite Forms in the dropdown box, then choose the Label and click Search/Refresh. Forms can be selected and added to the Work Item.

My Favorite Forms 🗸	Select	t Cancel	Cre	ate New Add to	Favorites	
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