



Creating Favorite Forms Bundles in Docupace

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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.

The screenshot shows the Docupace Form Library interface. At the top, there are four buttons: 'Select', 'Cancel', 'Create New', and 'Add to Favorites'. The 'Add to Favorites' button is highlighted with a red box. Below the buttons is a table with the following columns: Company, Form Type, Form Name, Form Category, Form Provider, Version Date, Revision Date, and Pages. The table contains three rows of data, all of which are selected (checked) in the left-hand column. The first row is for 'AMERICAN FUNDS' with the form name 'COLLEGEAMERICA ACCOUNT APPLICATION (DIGITAL)'. The second row is for 'AMERICAN FUNDS' with the form name 'COLLEGEAMERICA ACCOUNT CHANGE REQUEST'. The third row is for 'AMERICAN FUNDS' with the form name 'COLLEGEAMERICA ACCOUNT OPTIONS'. The 'Add to Favorites' button is also highlighted with a red box.

	Company	Form Type	Form Name	Form Category	Form Provider	Version Date	Revision Date	Pages
<input checked="" type="checkbox"/>	AMERICAN FUNDS	New Account	COLLEGEAMERICA ACCOUNT APPLICATION (DIGITAL)	College Planning	Quikl	05/01/2021	05/24/2021	8
<input checked="" type="checkbox"/>	AMERICAN FUNDS		COLLEGEAMERICA ACCOUNT CHANGE REQUEST	College Planning	Quikl	01/01/2021	06/04/2021	6
<input checked="" type="checkbox"/>	AMERICAN FUNDS		COLLEGEAMERICA ACCOUNT OPTIONS	College Planning	Quikl	04/01/2021	05/06/2021	7

This allows the user to create a Favorite Bundle and name the Label.

Add to Favorites ✕

Click in the **Label** field and choose an existing Label or to create a new Label, simply type your new Label name in the box and select Enter.

Label:

For Me

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
✕ Cancel
Create New
☆ Add to Favorites

Clear
Refresh

Label

American Funds 529 ✕

Form Type

None Selected

Company

None Selected

Form Name

Form Name

Form Category

None Selected

Form Provider

None Selected

	Company	Form Type	Form Name	Form Category	Form Provi
<input type="checkbox"/>					
<input checked="" type="checkbox"/>	AMERICAN FUNDS	New Account	COLLEGEAMERICA ACCOUNT APPLICATION (DIGITAL)	College Planning	Quikl
<input checked="" type="checkbox"/>	AMERICAN FUNDS		COLLEGEAMERICA ACCOUNT CHANGE REQUEST	College Planning	Quikl
<input checked="" type="checkbox"/>	AMERICAN FUNDS		COLLEGEAMERICA ACCOUNT OPTIONS	College Planning	Quikl