



— HOW-TO GUIDE

EVERY FORM IN ONE PLACE

Build your forms once, file them in folders, and send each job only the forms it needs. Every submission lands back in one spot.

BUILD

Your forms, your way

DEPLOY

Only what each job needs

TRACK

Every submission in one place



WHAT'S ON THE FORMS PAGE

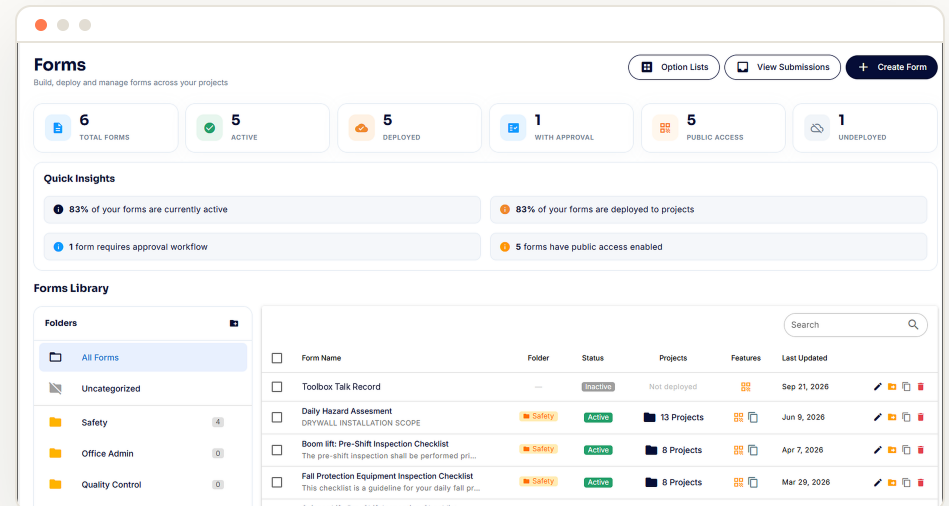
Forms live in two places. The **Forms page** is your master library, where you build every form, file it in folders and see all submissions. Each **project** has its own Forms tab where you import only the forms that job needs.

1 Two places for forms

3 Folders

2 Top bar and insights

4 The forms list



01

TWO PLACES FOR FORMS

FORMS

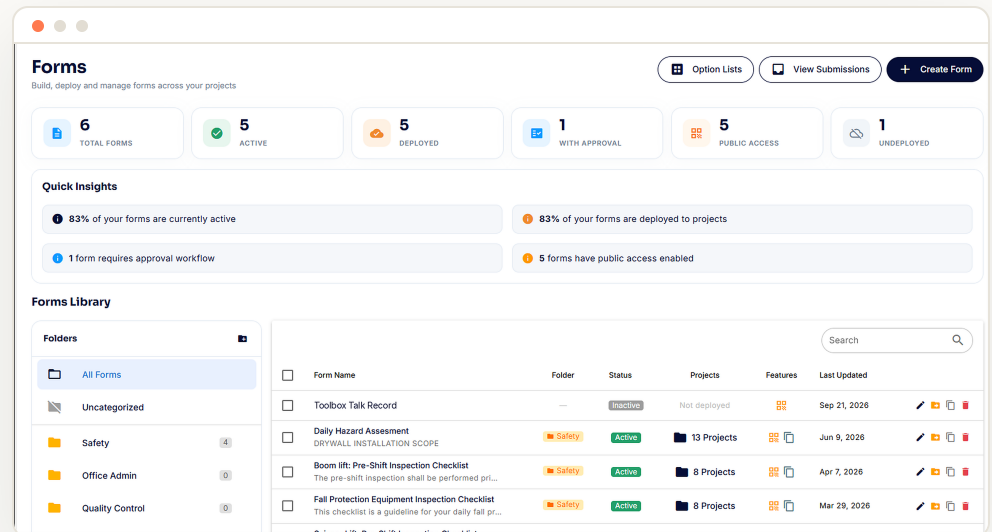
ADMIN

Set up once, then send each job just what it needs.

- 01 Forms page:** build every form, organize folders and view all submissions across your company.
- 02 Project Forms tab:** import forms from your library into that one job.
- 03** A job only needs a few forms. Keep the other hundred in the library, not cluttering the project.

WHY IT WORKS

Update a form in the library once and every project using it gets the same version.



02

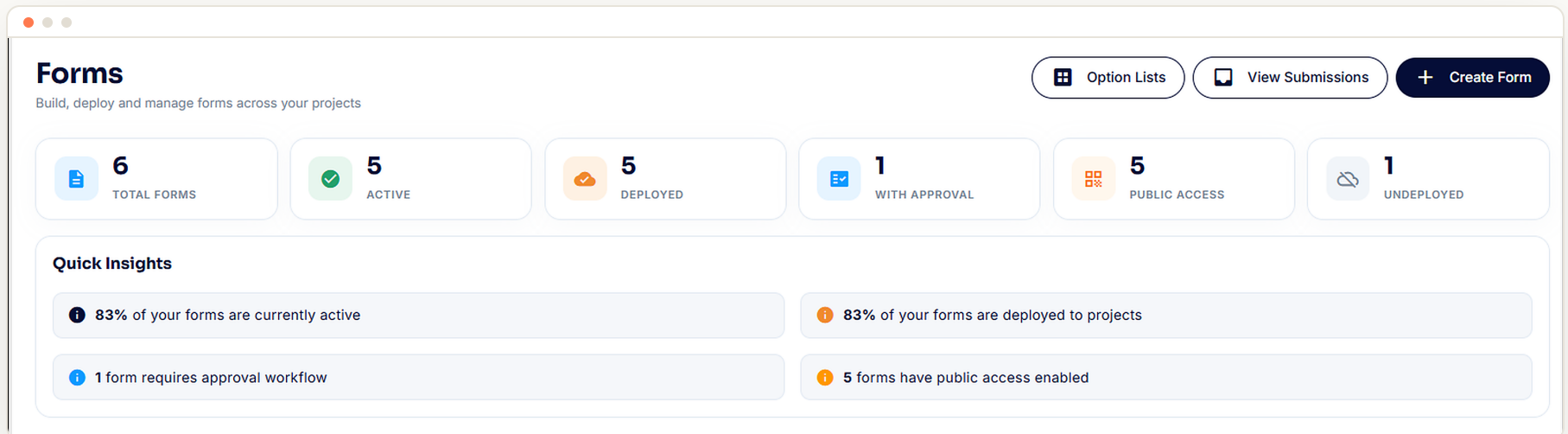
TOP BAR AND QUICK INSIGHTS

FORMS

ADMIN

See where your forms stand before you open one.

- 01 Option Lists, View Submissions and Create Form sit top right.
- 02 Six counters: Total, Active, Deployed, With Approval, Public Access and Undeployed.
- 03 Quick Insights turns those numbers into plain lines, like how many forms are deployed to projects.



03

FOLDERS

FORMS LIBRARY

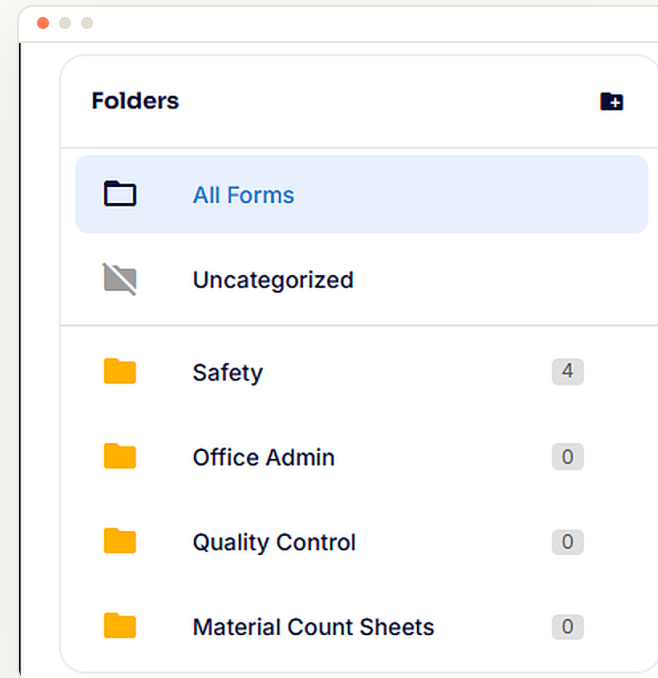
ADMIN

File forms the way your office thinks.

- 01 Press the **folder +** icon to make a new folder. Make as many as you want.
- 02 Folders like **Safety**, **Office Admin**, **Quality Control** and **Material Count Sheets**, each with its form count.
- 03 **All Forms** shows everything. **Uncategorized** holds forms not in a folder yet.

TIP

Folders matter later: in a project template you can add an entire folder, so new forms in it reach every job automatically.



04

THE FORMS LIST

FORMS LIBRARY

ADMIN

Every form, and where it's being used.

- 01 Each row shows the **folder**, **status** (Active or Inactive), how many **projects** it's deployed to, its **features** and when it was **last updated**.
- 02 **Search** finds a form by name.
- 03 Row icons: **edit**, **move to a folder**, **duplicate** and **delete**.

Search							
☐	Form Name	Folder	Status	Projects	Features	Last Updated	
☐	Toolbox Talk Record	—	Inactive	Not deployed		Sep 21, 2026	   
☐	Daily Hazard Assessment DRYWALL INSTALLATION SCOPE	 Safety	Active	 13 Projects	 	Jun 9, 2026	   
☐	Boom lift: Pre-Shift Inspection Checklist The pre-shift inspection shall be performed pri...	 Safety	Active	 8 Projects	 	Apr 7, 2026	   
☐	Fall Protection Equipment Inspection Checklist This checklist is a guideline for your daily fall pr...	 Safety	Active	 8 Projects	 	Mar 29, 2026	   
☐	Scissor Lift: Pre-Shift Inspection Checklist The pre-shift inspection shall be performed pri...	 Safety	Active	 7 Projects	 	Apr 7, 2026	   
☐	Field Level Hazard Assessment This purpose of this assessment is to identify '...	—	Active	 3 Projects	 	Jun 9, 2026	   
Records per page: 25 1-6 of 6							

— UP NEXT • PART 2

BUILD YOUR FIRST FORM

Part 2 walks through the form builder, step by step. Stuck on anything in Part 1? Send us an email and our team will get back to you.

support@subtradesoftware.com



SUBTRADE SOFTWARE LTD. • CALGARY, ALBERTA • SUBTRADESFTWARE.COM