



— HOW-TO GUIDE • PART 3

THE RIGHT FORMS ON EVERY **JOB**

Pull forms from your library into each project, then see who's filling them in, how often, and every submission on that job.



ADD

Only the forms the job needs

SHARE

QR code for the site

TRACK

Every submission, every crew

FORMS IN A PROJECT

Once your forms are built, the next step is your projects. Every project has its own **Forms** page: bring in only the forms that job needs, and track every submission on that job in one spot.

1 Open the project's forms

2 The project forms page

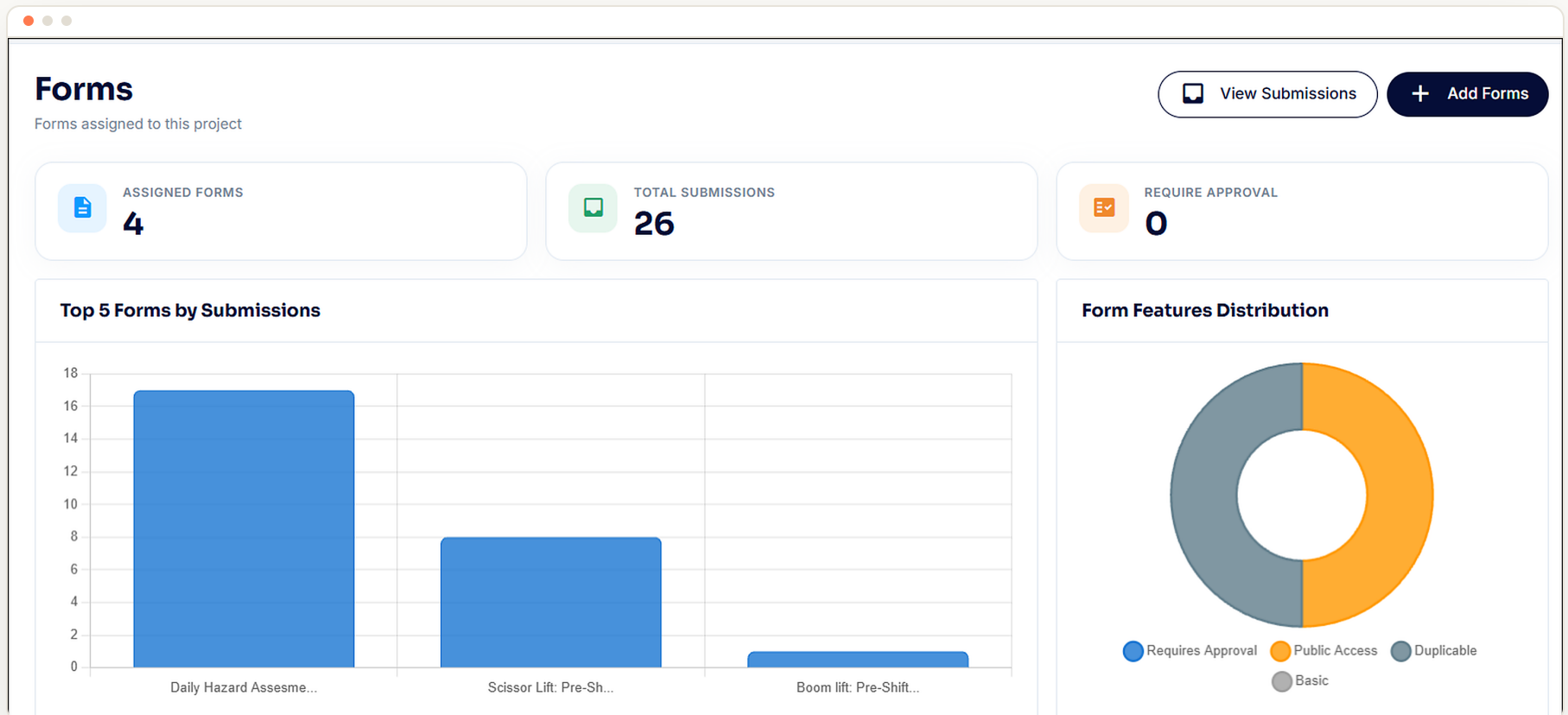
3 Add forms from the library

4 The project forms list

5 Project submissions

6 Team activity

7 Find any submission



01

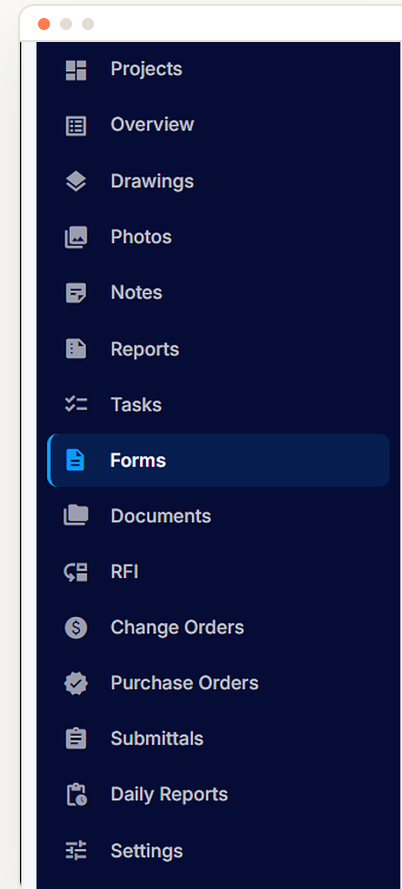
OPEN THE PROJECT'S FORMS

PROJECT

ADMIN

Every project has a Forms page of its own.

- 01 Open the project from your **Projects** page.
- 02 Press **Forms** in the project menu.
- 03 Only the forms you've added to this job show here. The rest stay in your library.



02

THE PROJECT FORMS PAGE

PROJECT FORMS

ADMIN

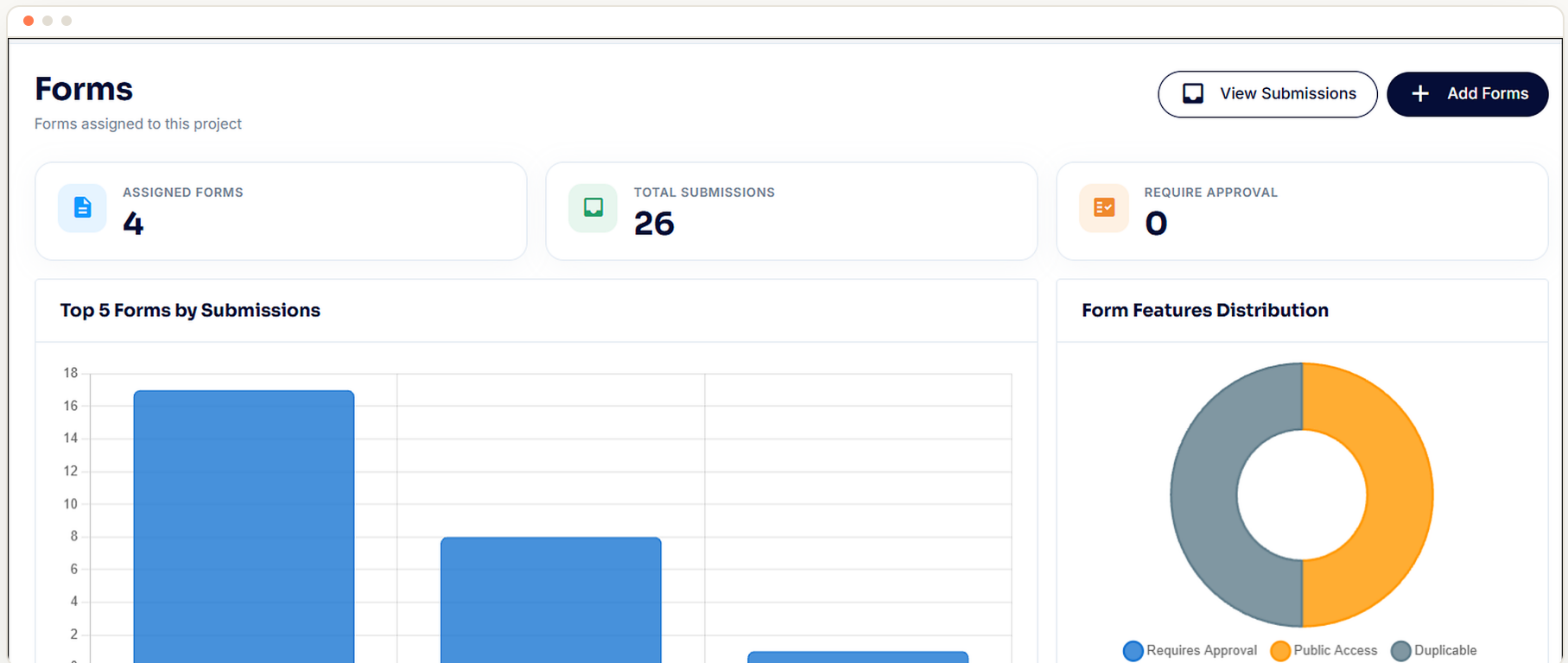
The job's forms at a glance.

01 Assigned Forms, Total Submissions and Require Approval for this job.

02 Top 5 Forms by Submissions shows which forms the crew uses most.

03 Form Features Distribution shows the mix of approval, public access and duplicable forms.

04 View Submissions and Add Forms sit top right.



03

ADD FORMS FROM THE LIBRARY

ADD FORMS

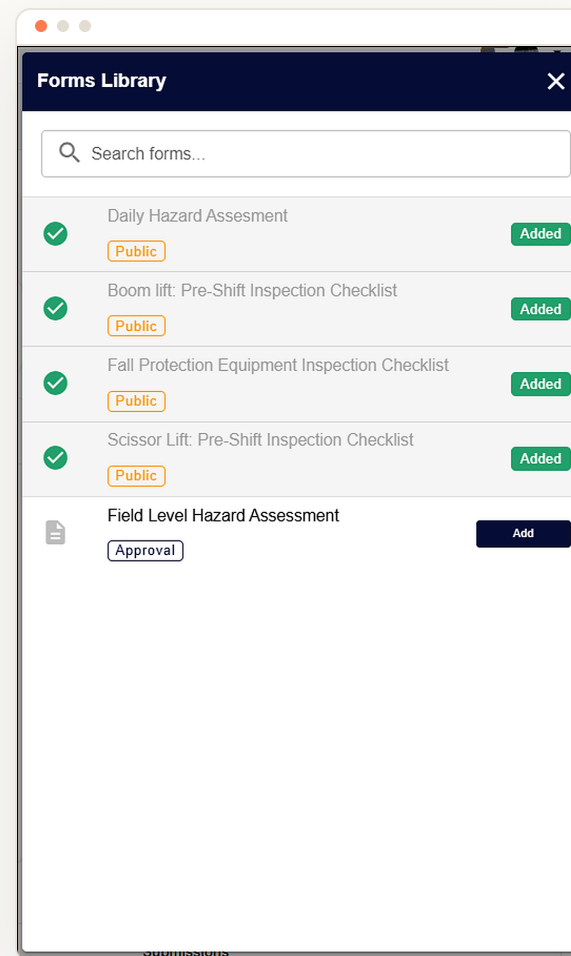
ADMIN

Bring in just what this job needs.

- 01 Press **Add Forms** to open your **Forms Library**. It lists every active form in your system.
- 02 Search by name, then press **Add** on each form the job needs.
- 03 Forms already on the job show a green check and **Added**.
- 04 Tags show each form's features, like **Public** or **Approval**.

TIP

Set up a project template with your usual forms (see the Project Dashboard guide) and new jobs start with them already added.



04

THE PROJECT FORMS LIST

PROJECT FORMS

ADMIN

Every form on the job and how much it's used.

- 01 Each form shows its **features**, like **Public** and **Duplicable**, and its **submission count** on this job.
- 02 The **QR code** opens the form's public link. Print it and post it on site so anyone can fill it in.
- 03 The **red minus** removes the form from this job. It stays in your library.

Project Forms				
Form Name	Features		Submissions	
Fall Protection Equipment Inspection Checklist This checklist is a guideline for your daily fall pr...	Public	Duplicable	0	QR Code -
Scissor Lift: Pre-Shift Inspection Checklist The pre-shift inspection shall be performed pri...	Public	Duplicable	8	QR Code -
Boom lift: Pre-Shift Inspection Checklist The pre-shift inspection shall be performed pri...	Public	Duplicable	1	QR Code -
Daily Hazard Assesment DRYWALL INSTALLATION SCOPE	Public	Duplicable	17	QR Code -

05

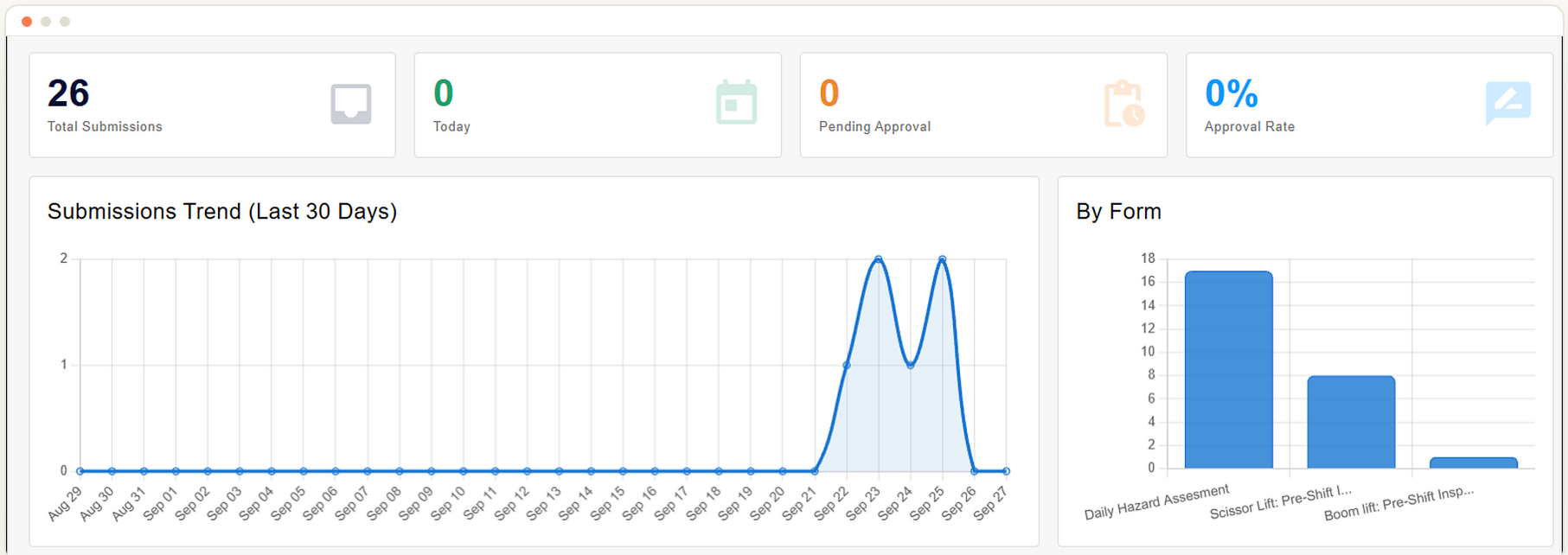
PROJECT SUBMISSIONS

[VIEW SUBMISSIONS](#)

[ADMIN](#)

Press **View Submissions** to see what's coming in.

- 01 Totals up top: **Total Submissions**, **Today**, **Pending Approval** and **Approval Rate**.
- 02 **Submissions Trend** shows the last 30 days, so you can spot the days nobody filled anything in. Use the filters to look at any other dates.
- 03 **By Form** shows which forms are getting done.
- 04 This is **this project only**. For every submission across the company, press **View Submissions** on the main Forms page.



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TEAM ACTIVITY

SUBMISSIONS

ADMIN

See who's filling in their forms, and who isn't.

- 01 **Top Submitters** ranks your crew by submissions, with when they last sent one.
- 02 **Inactive Members** shows who hasn't submitted anything.
- 03 **Top 5 Forms** lists the most-used forms on the job.

Team Activity		
User submission engagement		
4 active		
TOP SUBMITTERS		INACTIVE MEMBERS
1	Frank Vale 17 submissions Last: 1d ago	17 total
2	Mike Parsons 7 submissions Last: 2d ago	7 total
3	Jordan Dale Vance 1 submission Last: 1d ago	1 total
4	Sam Wheeler 1 submission Last: Jul 27	1 total

Top 5 Forms		
	Daily Hazard Assessment 17 submissions	17
	Scissor Lift: Pre-Shift I...	8
	Boom lift: Pre-Shift Ins...	1

07

FIND ANY SUBMISSION

FILTERS

ADMIN

Every submission on the job, one list.

- 01 Search, or filter by date range, person, form and approval status. Reset Filters clears them.
- 02 Each row shows the form, who submitted it, its status and the date and time.
- 03 Press a row to open the full submission.

Filters

Search submissions...

Date Range

Custom Range

Start Date

2026/01/01

End Date

2026/09/30

Approval Status

All

RESET FILTERS

Form	Submitted By	Status	Date
Daily Hazard Assesment DRYWALL INSTALLATION SCOPE	Jordan Dale Vance jordan@example.com	Submitted	Sep 25, 2026 8:05 am
Daily Hazard Assesment DRYWALL INSTALLATION SCOPE	Frank Vale frank@example.com	Submitted	Sep 25, 2026 7:58 am
Daily Hazard Assesment DRYWALL INSTALLATION SCOPE	Mike Parsons mike@example.com	Submitted	Sep 24, 2026 9:36 am
Daily Hazard Assesment DRYWALL INSTALLATION SCOPE	Mike Parsons mike@example.com	Submitted	Sep 23, 2026 8:03 am
Daily Hazard Assesment DRYWALL INSTALLATION SCOPE	Mike Parsons mike@example.com	Submitted	Sep 23, 2026 7:29 am
Daily Hazard Assesment DRYWALL INSTALLATION SCOPE	Frank Vale frank@example.com	Submitted	Sep 22, 2026 8:20 am

— UP NEXT • PART 4

REVIEW A SUBMISSION

Part 4 opens a submission and walks through reviewing and approving it. Stuck on anything in Part 3? Send us an email and our team will get back to you.

support@subtradesoftware.com



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