smarter drafter PRO
by tensis

Retiring Forms and Documents

Module 20 - Retiring Forms & Documents

Version 1.0

Table of Contents

1.   Retiring Forms

Forms moved to the recycle bin are available for 90 days. If the form hasn't been restored within 90 days, it will automatically be deleted without notice. We recommend moving forms to a retired folder so that you have the ability to restore them and more control of permanent deletion.

1.1   Retiring Forms

1.   Ensure you have a **retired folder in your form library**:

    >> Create a folder in your Smarter Drafter library in a miscellaneous area

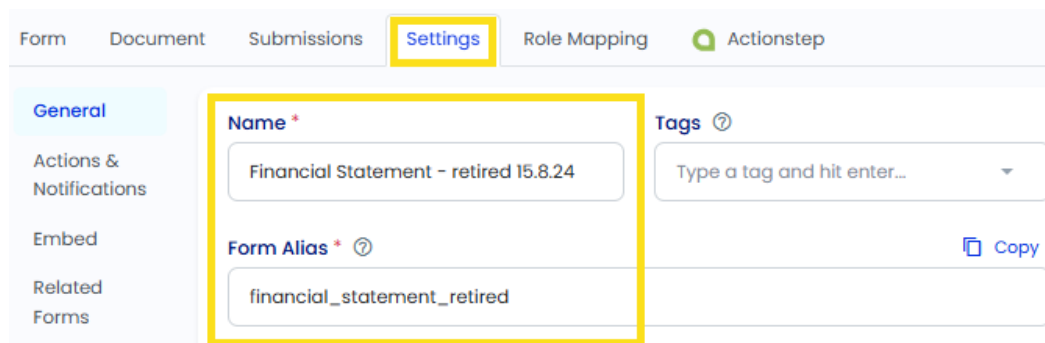   >> Name the folder e.g. zzRetired
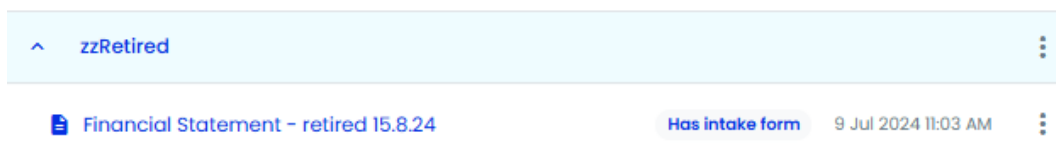
2.   **Rename** the form to add the suffix '**– Retired**' and retirement date:

    >> In the published version of the form, go to **Settings**

    >> Adjust the name to add the suffix '– Retired' and the retirement date

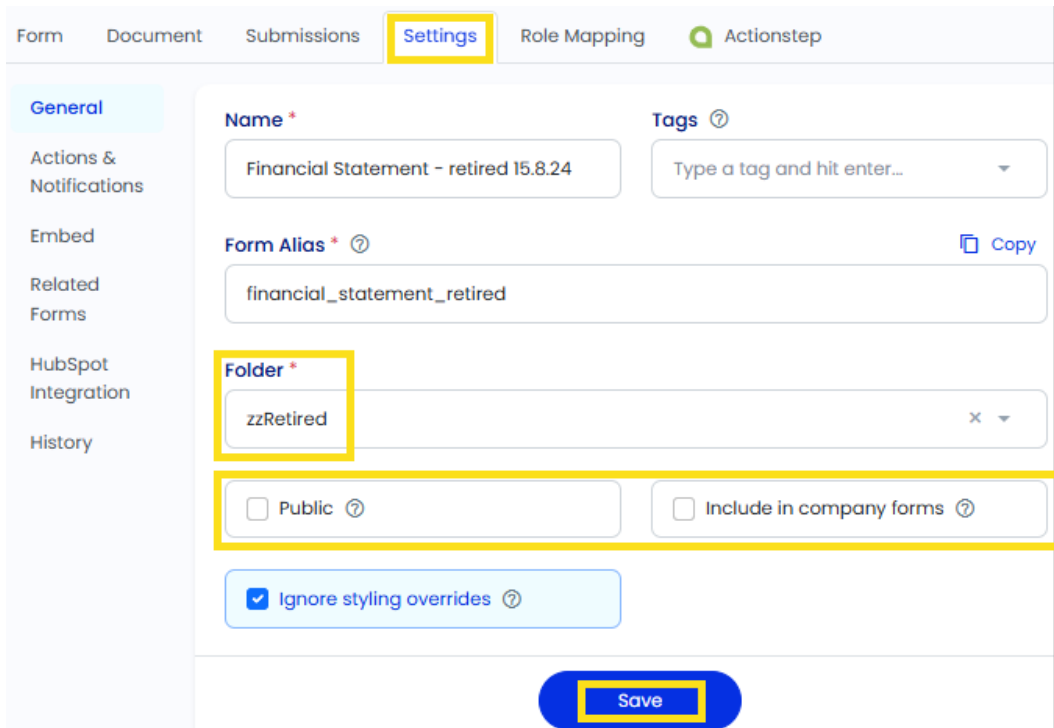   >> Adjust the form alias to add 'retired'

3.   Move the form to the zzRetired subfolder:

    >> in the published version of the form, go to **Settings**

    >> in the folder list, select the zzRetired folder

    >> click **Save**

4. Remove the form from the **public library**:

    >> In the published version of the form, go to **Settings**

    >> Untick **Public**

    >> Untick **Include in Company Forms**

    >> Click **Save**

1.2   Retiring Documents

5. If you keep a separate library of the Word templates, rename the relevant template to add the same suffix '**- Retired**' and the retirement date.

1.3   History Logs

6. If you keep a history log, create an update entry for the retirement of the form.