

# Onboarding Checklist: Forms with Text



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When getting started with Updox Forms and Text, make sure to follow this checklist to ensure your practice will be set up for long-term success.

1. Create user accounts under **Menu - Admin - Users** with [this guide](#).

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2. Watch this quick video on getting started with Forms:

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3. Review the Following Articles:

- [Creating Forms](#)
  - [Accessing Forms](#)
  - [Manage completed Forms](#)
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4. Set-up [templates](#) and review the most [common text template](#) to use with forms.

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