Sending Customer Level eForms

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You can upload a customer level eForm two different ways. Follow the steps below and choose the one that works best for you

1) Log into the customers page in question, click on the eForms tab below, add a name, description and select the eform from the templates drop down and click save

2) Click on the eForm number (in our example eForm 4162) and you will be transferred to the assignee screen and you can proceed with delivering the eForm to the recipient

3) If you prefer you can log into eForms, click on send template select the name, description, templates and customer and push save

4) You will be taken to the assignee screen and you can proceed with delivering the eForm to the recipient