

eForms: Templates

Last Modified on 01/23/2025 8:06 pm EST

Use this section to create and manage your templates. Below is more information about each tab.

Name	Description	Type	Integration	Data Type	PDF Backdrop?	Default	
Default Invoice	Default Invoice		Managely	Invoice	No	Yes	Copy
Default Credit	Default Credit		Managely	Credit	No	Yes	Copy
Default WorkOrder	Default WorkOrder		Managely	WorkOrder	No	Yes	Copy
Default Statement	Default Statement		Managely	Statement	No	Yes	Copy
Default Purchase Order	Default Purchase Order		Managely	PurchaseOrder	No	Yes	Copy
Default Proposal	Default Proposal		Managely	Proposal	No	Yes	Copy
UI			Managely	Proposal	No	No	Copy Design
Default Purchase Order - Copy	Default Purchase Order		Managely	PurchaseOrder	No	No	Copy Design
1 for sales rename	sales	Sales Contract	Managely	Proposal	Yes	No	Copy Design
sales 2	sale	Sales Contract	None	None	Yes	No	Copy Design
Pete Test Template	blah		Managely	Proposal	No	No	Copy Design
Security Contract w/ Payment Capture	Security Contract w/ Payment Capture	Sales Contract	Managely	Customer	Yes	No	Copy Design
Payment Authorization	Payment Authorization		Managely	Customer	No	No	Copy Design
Inspection - Sales Contract	Inspection - Sales Contract	Sales Contract	Managely	Customer	Yes	No	Copy Design

There are two tabs on the Templates page.

Templates

This tab is where you create and edit forms that can be used more than once.

Click the **Add Template** button:

Add Template [Close]

Name •

Description

Type

Integration

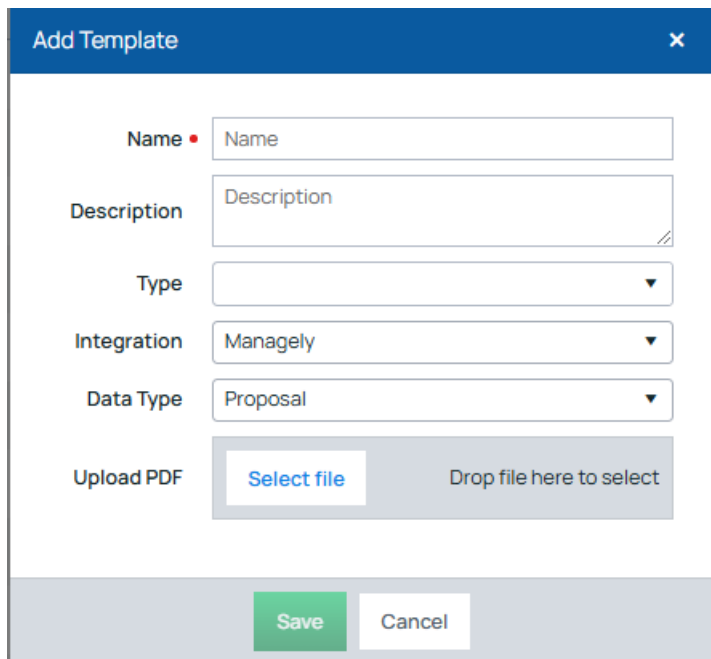
Upload PDF Drop file here to select

Name: Type a name for the template.

Description: Type a description for the template.

Type: Choose a type for the template.

Integration: Select an integration for the template. If you change the **Integration** to Managely, you can see the **Data Type** field:



The screenshot shows a modal window titled "Add Template" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Name:** A text input field with the placeholder text "Name".
- Description:** A larger text input field with the placeholder text "Description".
- Type:** A dropdown menu with a downward arrow.
- Integration:** A dropdown menu with "Managely" selected and a downward arrow.
- Data Type:** A dropdown menu with "Proposal" selected and a downward arrow.
- Upload PDF:** A section containing a "Select file" button and a grey area with the text "Drop file here to select".

At the bottom of the modal, there are two buttons: a green "Save" button and a white "Cancel" button with a grey border.

Templates with Data Type of Work Order

For Templates with the Managely Integration and the Work Order Data Type, the form shows a **Is Default?** switch. If this field is set to YES, there is another switch called **Apply to All Customers?** If this switch is set to YES, there is a blank field that opens a list where you can select any number of invoice/work order types that the default template will be applied to.

Edit Template ✕

Name •

Description

Type

Integration

Data Type

Is Default? YES NO

Apply to All Customers? YES NO

Select Work Order Types

- Service Call (comm)
- Fire Inspection
- Fire Alarm Installation
- CCTV Installation
- Take Over / Conversion
- Inspection
- CCTV Installation - Commercial

Packages

This tab allows you to group templates and send them as a group.

MANAGELY™

Customers Customer Search: name - cust #

? 🔔 👤 Thomas Utley

EF eForms ▼ Templates

🏠 Home
📁 Templates
⚙️ Setup
📊 Reports

Templates

Packages

+ Add Package
Send Package
NO Show inactive

Drag a column header and drop it here to group by that column

	Name	Description	Category	Integration	Data Type	
+	New boy	New boy		None	Proposal	✎ Edit 🗑 Delete
+	bv	v b		Managely	Customer	✎ Edit 🗑 Delete
+	Testing packages	bug 20476		Managely	Proposal	✎ Edit 🗑 Delete
+	Eric Northman	testing multiple forms		Managely	Proposal	✎ Edit 🗑 Delete
+	Shahed's eForms		Sales Contract	Managely	Proposal	✎ Edit 🗑 Delete
+	testttt	t	Sales Contract	Managely	Customer	✎ Edit 🗑 Delete
+	asdfasdfsdf	asdfasdf	Sales Contract	Managely	Proposal	✎ Edit 🗑 Delete
+	testy	test	Sales Contract	Managely	Proposal	✎ Edit 🗑 Delete

1 - 8 of 8 items
🔄 Refresh

← Collapse
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