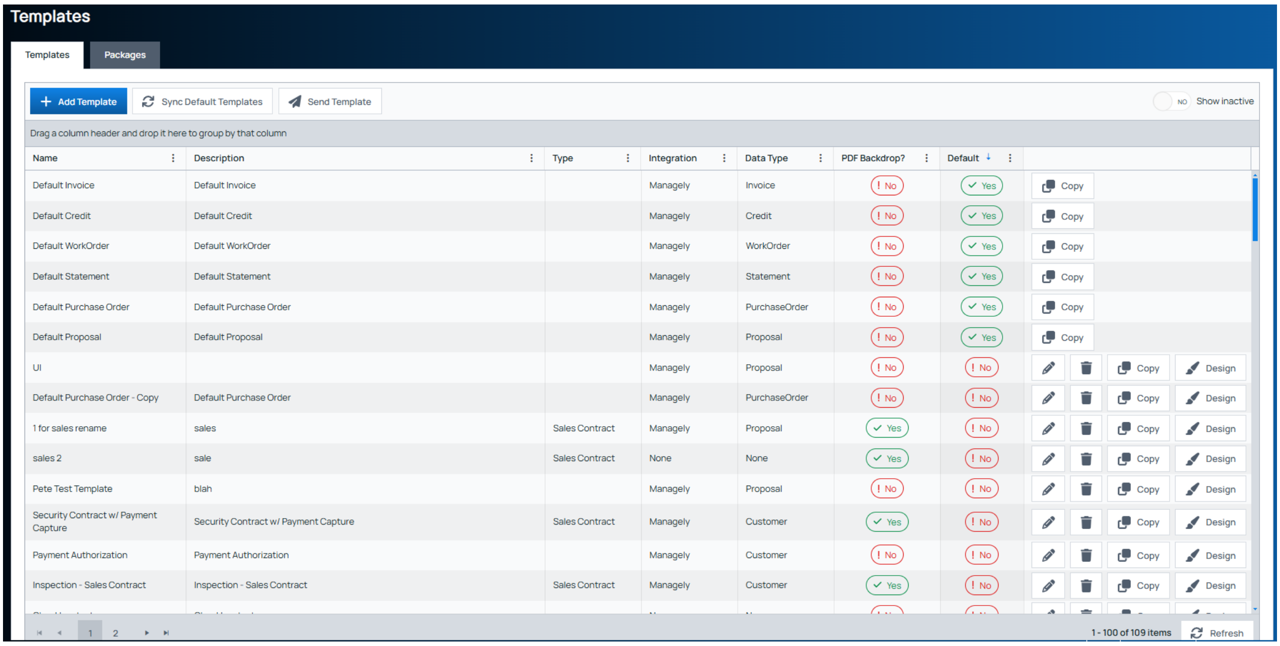
eForms: Templates

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.

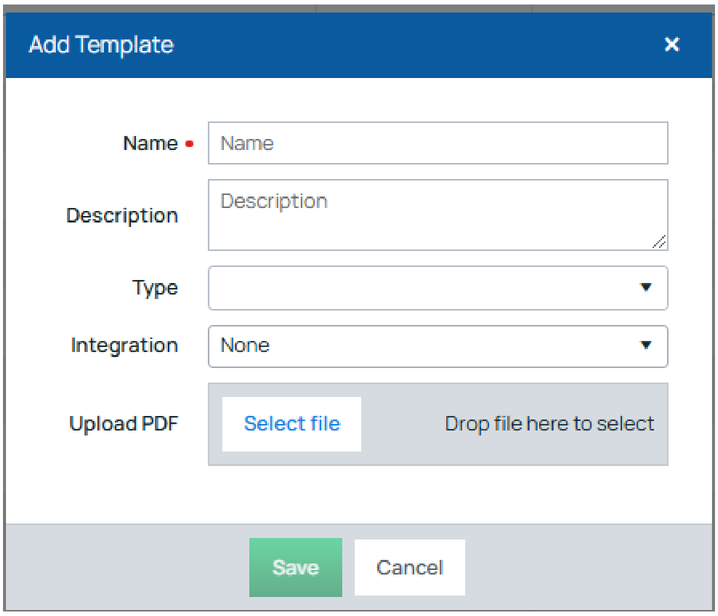


There are two tabs on the Templates page.

Templates

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

Click the **Add Template** button:

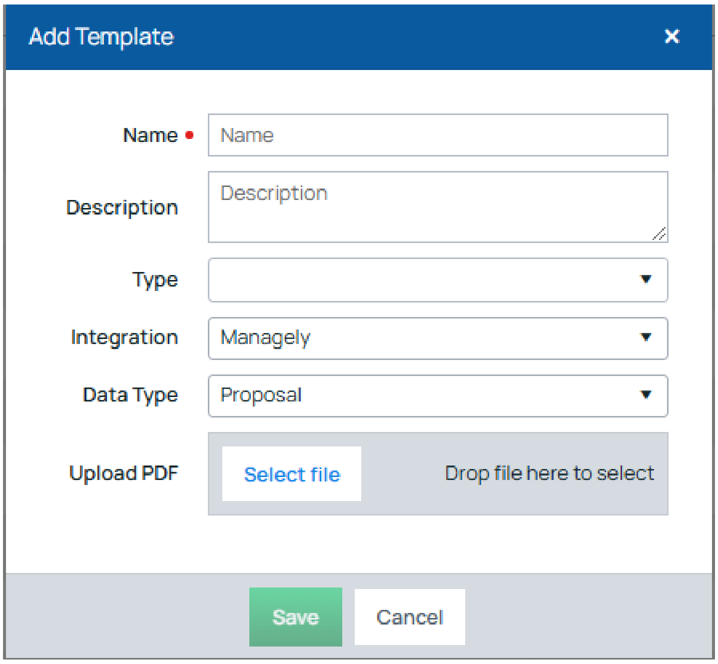


Name: Type a name for the template.

Description: Type a description for the template.

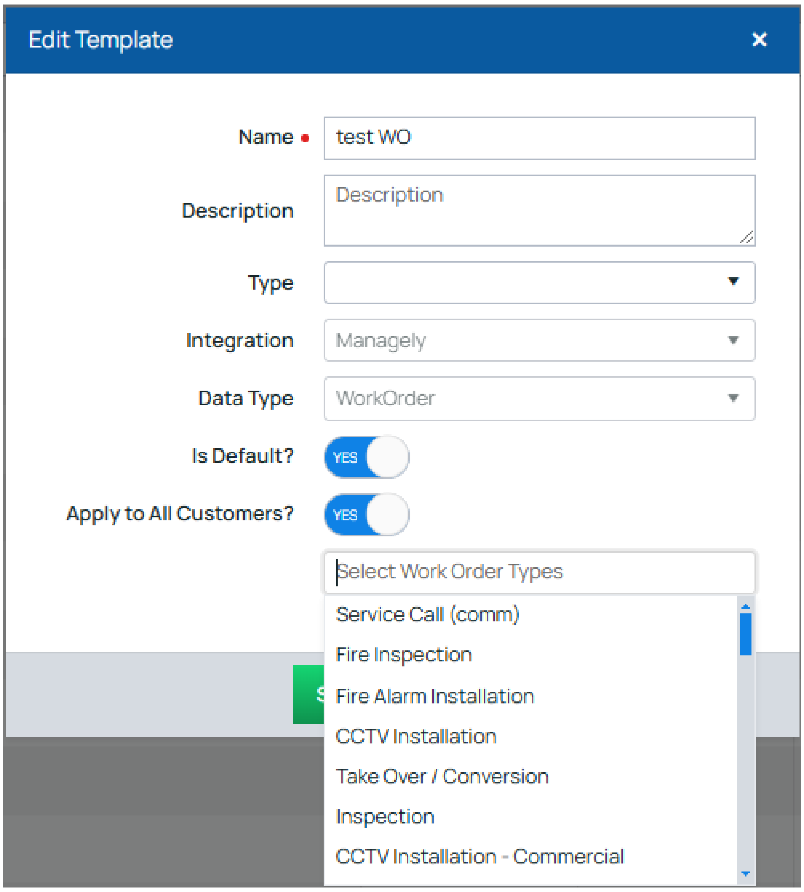
Type: Choose a type for the template.

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



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.



Packages

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