

# eForms: Templates

Last Modified on 12/16/2024 5:05 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	Edit, Delete, Copy, Design
Default Purchase Order - Copy	Default Purchase Order		Managely	PurchaseOrder	No	No	Edit, Delete, Copy, Design
1 for sales rename	sales	Sales Contract	Managely	Proposal	Yes	No	Edit, Delete, Copy, Design
sales 2	sale	Sales Contract	None	None	Yes	No	Edit, Delete, Copy, Design
Pete Test Template	blah		Managely	Proposal	No	No	Edit, Delete, Copy, Design
Security Contract w/ Payment Capture	Security Contract w/ Payment Capture	Sales Contract	Managely	Customer	Yes	No	Edit, Delete, Copy, Design
Payment Authorization	Payment Authorization		Managely	Customer	No	No	Edit, Delete, Copy, Design
Inspection - Sales Contract	Inspection - Sales Contract	Sales Contract	Managely	Customer	Yes	No	Edit, Delete, 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** [X]

**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 'Add Template' modal form contains the following fields and controls:

- Name:** Text input field with the value 'Name'.
- Description:** Text area with the value 'Description'.
- Type:** Dropdown menu.
- Integration:** Dropdown menu with the value 'Managely'.
- Data Type:** Dropdown menu with the value 'Proposal'.
- Upload PDF:** A button labeled 'Select file' and a grey area with the text 'Drop file here to select'.
- Buttons:** 'Save' (green) and 'Cancel' (white) buttons at the bottom.

## Packages

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

The screenshot shows the MANAGELY interface with the 'Packages' tab selected. The interface includes a top navigation bar with the MANAGELY logo, a search bar, and user information. A left sidebar contains navigation options: Home, Templates, Setup, and Reports. The main content area displays a table of packages with columns for Name, Description, Category, Integration, and Data Type. Each row includes 'Edit' and 'Delete' icons. The table is currently showing 8 items.

	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
+	asdfasdf	asdfasdf	Sales Contract	Managely	Proposal	Edit Delete
+	testy	test	Sales Contract	Managely	Proposal	Edit Delete

