

eForms: Templates

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This section is where you will create and manage your templates. Below is more information about each tab.

This screen is also at Setup > Other > Templates.

There are two tabs within the Templates section.

Templates

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

The screenshot displays the MANAGELY eForms interface. The top navigation bar includes the MANAGELY logo, a 'Customers' dropdown, a search bar for 'Customer Search: name - cust. #', and a user profile for 'Thomas Utley'. The left sidebar shows navigation options: Home, Templates (selected), Setup, and Reports. The main content area is titled 'Templates' and features two tabs: 'Templates' and 'Packages'. Below the tabs are buttons for '+ Add Template' and 'Send Template', along with a 'Show inactive' toggle. A table lists various templates with columns for Name, Type, Integration, Data Type, and PDF Backdrop?. The table contains the following data:

Name	Type	Integration	Data Type	PDF Backdrop?	Actions
Security Contract w/ Payment Capture	Sales Contract	Managely	Customer	Yes	Edit, Delete, Copy, Design
sales 2	Sales Contract	None	None	Yes	Edit, Delete, Copy, Design
Proposal Template - SF	Proposal	Managely	Proposal	Yes	Edit, Delete, Copy, Design
Proposal Template	Proposal	Managely	Proposal	Yes	Edit, Delete, Copy, Design
Proposal	Sales Contract	Managely	Proposal	No	Edit, Delete, Copy, Design
Managely Proposal	Welcome Letter	Managely	Proposal	No	Edit, Delete, Copy, Design

The footer of the interface includes the text '© 2022 Bold Group Enterprise Plus Best Security Version 5.3.6.28'.

Packages

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

- EF eForms
- Home
- Templates
- Setup
- Reports

Templates

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

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1 - 8 of 8 items Refresh

Collapse