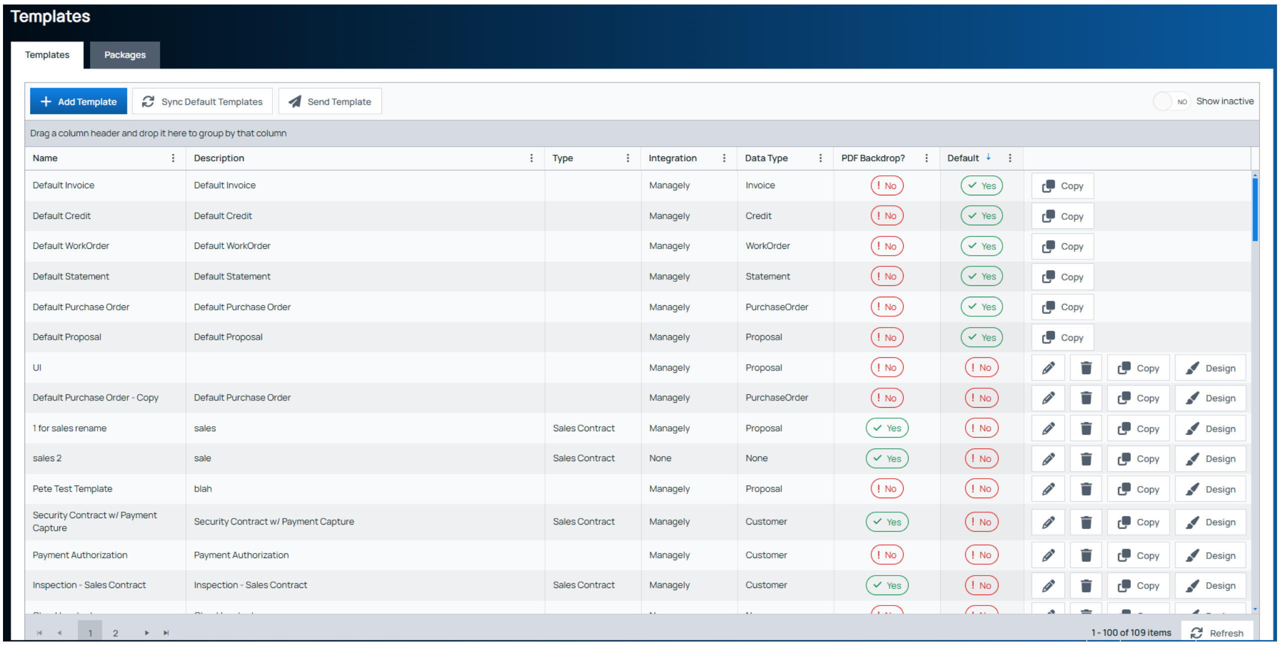
eForms: Templates

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.

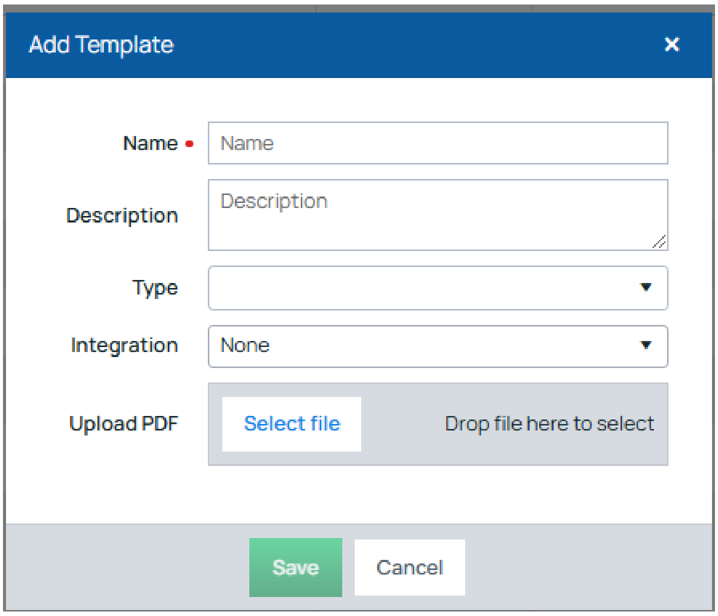


There are two tabs on the Templates page.

Templates

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

Click the **Add Template** button:

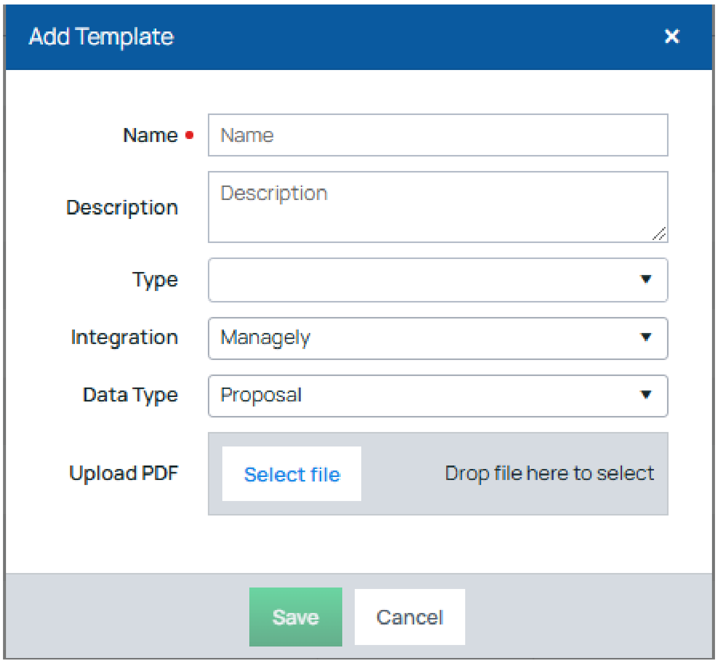


Name: Type a name for the template.

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:



Packages

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