Sending eForms from the Customer Account

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You can send eForms to customers to be digitally signed.

The templates used for eForms are categorized by their data type, so be sure to use a template from the correct data type. Here are the data types:

- **Proposal**: Use this data type for Proposals.
- **Customer**: This is great for eForms like Welcome Letters.
- **Site**: This is for site-specific eForms like inspections.
- **System**: This is for eForms that might be sent to your client's main office, like verifying their company details.

To better understand how to send a template from eForms, watch the **video.**