

Sending eForms from the Customer Account

Last Modified on 08/12/2024 1:18 pm EDT

With eForms, you will be able to send them to customers to be digitally signed.

Remember to Match the Data Type

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**.
