

# How to Design a Template

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## Add a new template

Begin a new template by clicking **+ Add Template**. Then, fill out the pop-up shown below and click **Save** to continue.

**Name:** Enter a title for the template here.

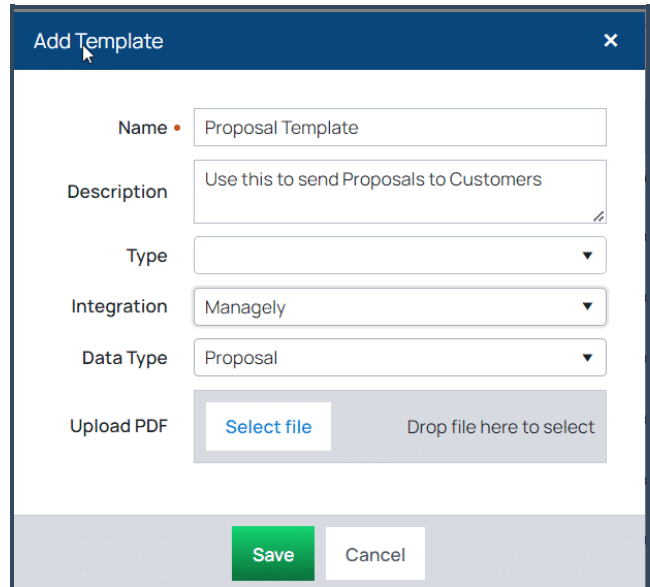
**Description:** Enter information about the template like what it's used for.

**Type:** This categorization is set at Setup > Other > Template Types to help you organize your templates.

**Integration:** This is where you choose which database to use in the template. Currently, Managely is the only one available.

**Data Type:** This lists the categories of data types available in the Managely Database. If you choose incorrectly, you will need to delete and start over.

**Upload PDF:** This allows you to upload a PDF of a paper form you already use as a background for the eForm.

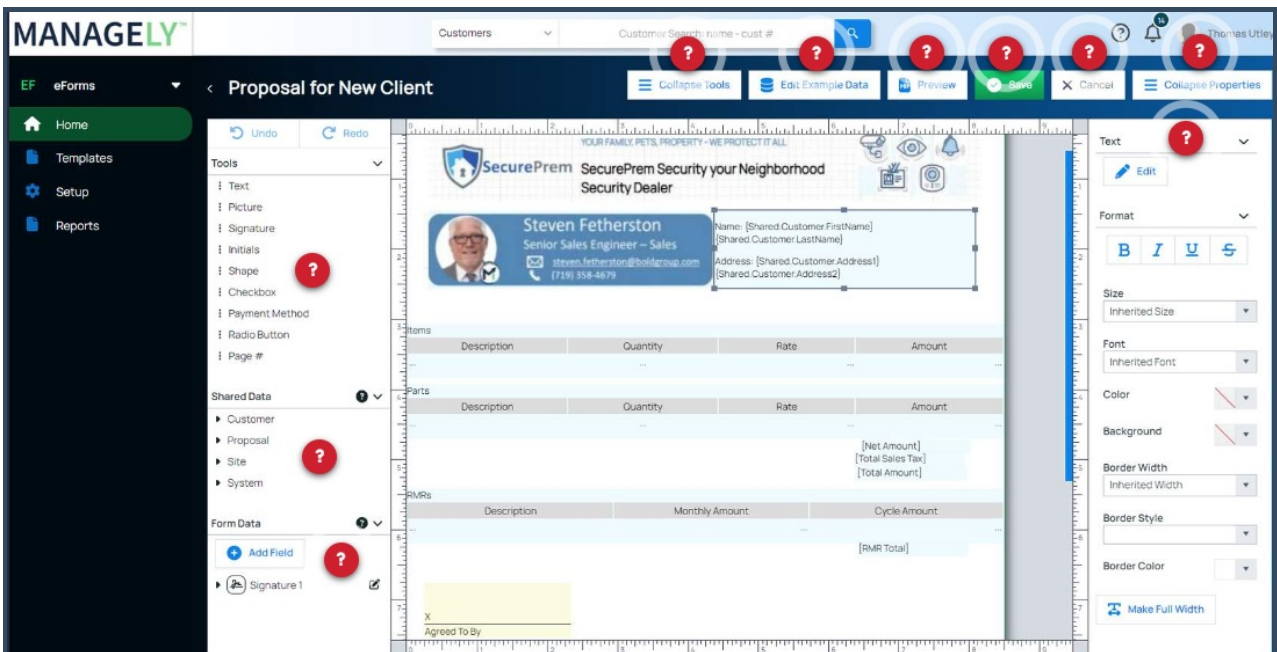


The 'Add Template' dialog box contains the following fields and options:

- Name:** Text input field containing "Proposal Template".
- Description:** Text input field containing "Use this to send Proposals to Customers".
- Type:** Dropdown menu (empty).
- Integration:** Dropdown menu containing "Managely".
- Data Type:** Dropdown menu containing "Proposal".
- Upload PDF:** A section with a "Select file" button and the text "Drop file here to select".

At the bottom of the dialog are "Save" and "Cancel" buttons.

## Parts of the Design Screen



The screenshot shows the MANAGELY design interface for a "Proposal for New Client". The main workspace features a grid background with a form for "SecurePrem Security your Neighborhood Security Dealer". The form includes a contact card for Steven Fetherston and three tables:

Items	Description	Quantity	Rate	Amount

Parts	Description	Quantity	Rate	Amount

RVRs	Description	Monthly Amount	Cycle Amount

Additional form elements include a signature line for "X Agreed To By" and a signature icon. The interface includes a sidebar with navigation options (Home, Templates, Setup, Reports) and a "Tools" panel with various form elements like Text, Picture, Signature, etc. A "Form Data" panel allows adding fields and signatures. A top toolbar contains "Collapse Tools", "Edit Example Data", "Preview", "Save", "Cancel", and "Collapse Properties". A right-hand "Text" properties panel offers formatting options like font, size, color, and background.

<p style="text-align: center;"><b>Tools</b></p>	<p>These tools will add blocks to the form. To use them, click and drag the name of the tool to where you want the part to be on the form.</p> <ul style="list-style-type: none"> <li>• <b>Text:</b> adds a part where text and auto-fill fields can be placed on the form. Great for filling in blanks on a PDF.</li> <li>• <b>Picture:</b> adds a logo or other graphic to the form.</li> <li>• <b>Signature:</b> adds an interactive signature field. Needs assigned when sent by email.</li> <li>• <b>Initials:</b> adds an interactive field for initials. Needs assigned when sent by email.</li> <li>• <b>Shape:</b> adds a horizontal line, vertical line, or a box. Great for dividing parts of the form.</li> <li>• <b>Checkbox:</b> adds an interactive checkbox with a label. <ul style="list-style-type: none"> <li>◦ Needs assigned when sent by email.</li> <li>◦ Multiple choices can be selected.</li> </ul> </li> <li>• <b>Payment Method:</b> adds a drop-down for the customer to choose from a list of their payment methods on file. Buttons to add payment methods are included.</li> <li>• <b>Radio Button:</b> adds a radio button with a label. <ul style="list-style-type: none"> <li>◦ Needs assigned when sent by email.</li> <li>◦ Only one choice can be selected.</li> </ul> </li> <li>• <b>Page #:</b> adds a field showing the page number of the total pages.</li> </ul>
<p style="text-align: center;"><b>Shared Data</b></p>	<p>This section contains auto-fill fields and pre-formatted blocks from parts of Managely that can be added to the form. Use the <b>Edit Columns Button</b> in the Properties Column on the right side of the screen to choose the columns for the shared data parts.</p> <p>Unformatted fields can also be added using the Text Tool.</p>
<p style="text-align: center;"><b>Form Data</b></p>	<p>These are the blocks that were selected in the tools to be filled out by the recipient of the form. They will need to be assigned before sending by email.</p> <p>The <b>Add Field</b> button allows you to create your own Form Data Field, but it will not be connected to other fields in Managely. It is typically used when an editable field is needed by either the sender or recipient and you can select if it is required for the sender or recipient to complete this field.</p>

<b>Collapse Tools</b>	This closes the left column that has the design tools and fields.
<b>Edit Example Data</b>	This allows you to change which proposal, contract, etc. that is being used for the preview.
<b>Preview</b>	This downloads a PDF example of your design.
<b>Save</b>	This saves your designed eForm.
<b>Cancel</b>	This button removes your unsaved design.
<b>Collapse Properties</b>	This closes the column on the right side used to add detail.
<b>PropertiesColumn</b>	<p>This column allows you to change the colors, sizes, etc. of the fields when they are placed on a form.</p> <p>For the commonly used <i>Text tool</i>, click the <b>Edit Button</b> to add text and auto-fill fields with Managely data.</p>

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