How to Design a Template

Last Modified on 08/12/2024 3:02 pm EDT

Add a new template

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

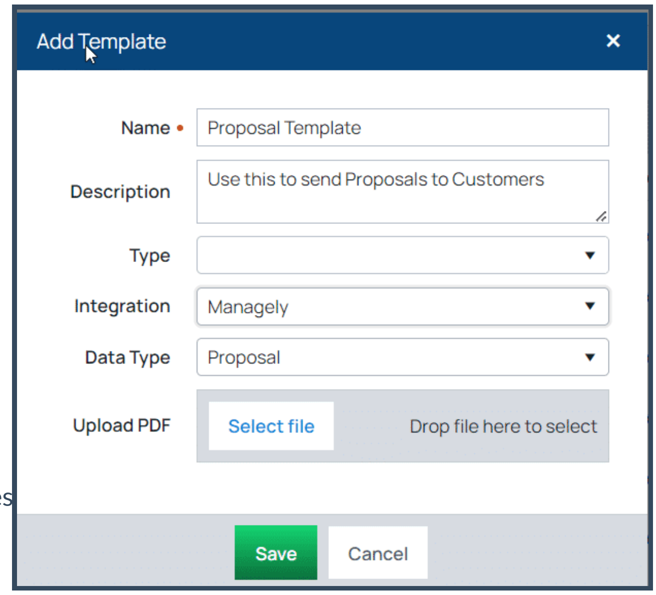
Name: Enter a title for the template here.

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.

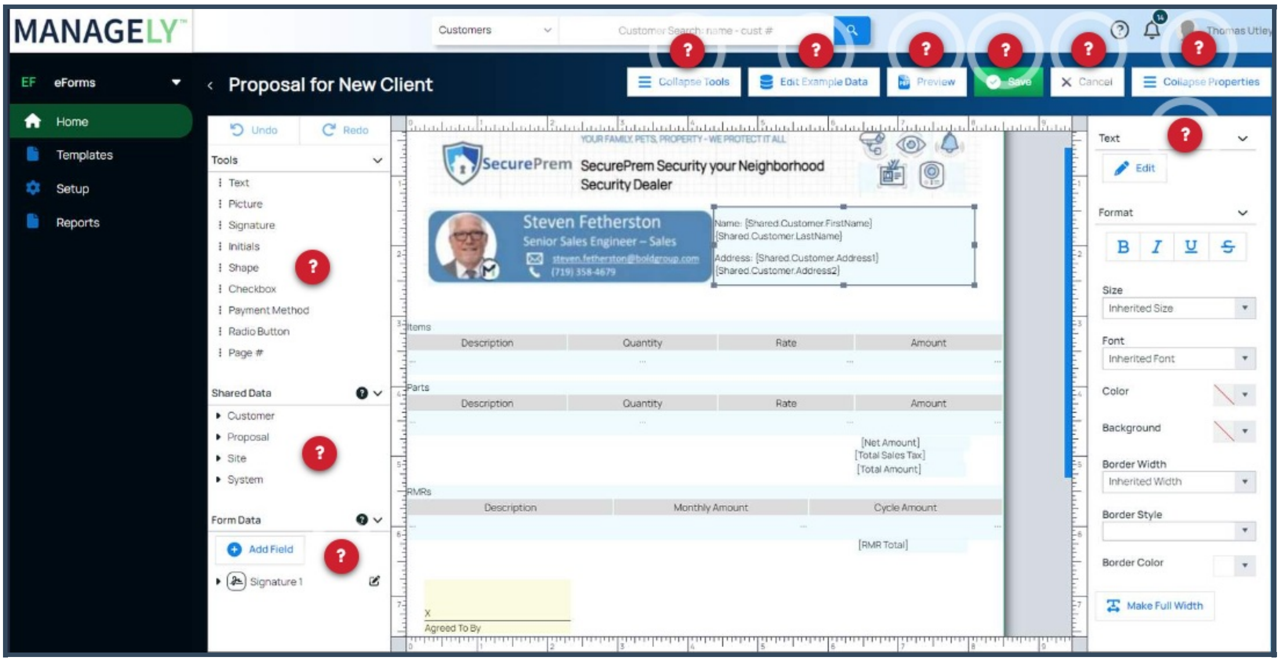
Integration: This is where you choose which database to use in the template. Currently, **Managely** is the only one available.

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.

Parts of the Design Screen



<table>
<tr>
<td>Tools</td>
<td>
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.

Text: adds a part where text and auto-fill fields can be placed on the form. Great for filling in blanks on a PDF.
Picture: adds a logo or other graphic to the form.
Signature: adds an interactive signature field. Needs assigned when sent by email.
Initials: adds an interactive field for initials. Needs assigned when sent by email.
Shape: adds a horizontal line, vertical line, or a box. Great for dividing parts of the form.
Checkbox: adds an interactive checkbox with a label.

Needs assigned when sent by email.
Multiple choices can be selected.

Payment Method: 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.
Radio Button: adds a radio button with a label.

Needs assigned when sent by email.
Only one choice can be selected.

Page #: adds a field showing the page number of the total pages.

</td>
</tr>
<tr>
<td>Shared Data</td>
<td>
This section contains auto-fill fields and pre-formatted blocks from parts of Managely that can be added to the form. Use the Edit Columns Button in the Properties Column on the right side of the screen to choose the columns for the shared data parts.
Unformatted fields can also be added using the Text Tool.
</td>
</tr>
<tr>
<td>Form Data</td>
<td>
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.
The Add Field 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.
</td>
</tr>
</table>

Collapse Tools	This will close the left column that has the design tools and fields.
Edit Example Data	This will allow you to change which proposal, contract, etc. that is being used for the preview.
Preview	This will download a PDF example of your design.
Save	This will save your designed eForm.
Cancel	This button will remove your unsaved design.
Collapse Properties	This will close the column on the right side used to add detail.
Properties Column	This column will allow you to change the colors, sizes, etc. of the fields when they are placed on a form. For the commonly used *Text tool*, click the **Edit Button** to add text and auto-fill fields with Managely data.