Clickable Fields on Templates

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These steps describe using clickable fields on templates.

- 1. Navigate to Templates & Forms > Templates.
- 2. Click the Add Template button.

Add Ter	nplate					×	
hat							
n	Name •	Assignal	ble Tem	plate			dro
	Description	Descript	ion				No
bice	Туре	Sales Co	ontract		×	•	No
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	Data Type	Contrac	t		,	•	No
posa	Upload PDF	Selec	t file		Drop file here to selec	t	No
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rk Order		Mana	agely		WorkOrder	- (i	No

- 3. Fill in the form and click **Save**.
- 4. The template is added to the template grid.
- 5. Find it in the grid and click **Design**.
- 6. Add different elements to the template, and notice that checkboxes and radio buttons can be configured to be required. Here are different element types from the Tools and Shared Data menus on the left. Required fields, and ones that require a signature show up in yellow:

< Assignable Templa	te E Collapse Tools	Edit Example Data 🕞 Preview 📀 Save 🗙 Cancel 🚍 Expand Prope
No Statements Partner Program Id Payment Methods Phone 1 Phone 1 Ext Plus 4 Portal Link	2 2 4 4 4 4 4 4 4 4 4 4 4 4 4	7 <u></u>
Priority Registration Key Sales Person Name Salesperson Id Show Open Invoices Sites State State	A signature element A signature element Required checkbox Non-required checkbox Add Payment Method Add Credit Card Add eCheck Add Credit Card Add eCheck Add echeck	d Radio button 1 d Radio button 2 s1]
Suppress Recurring Invoice Del Systems Term Zip Code	Systems System Number System Type Panel T	Type

- 7. Click the **Save** button and go back to the Templates screen.
- 8. Click the Send Template button.
- 9. A dialog form opens. Type a name and choose the template you created and a contract/customer (the depends on the type of template you created).
- 10. In the page that opens, find and click the **Assign** button in the Forms tab under Status.

< Sending As	signable Template		Send 2 Refresh 🕥 Histor	/
Details Name • Description Expires On • Push Data @ Push Document @	Sending Assignable Template Sending Assignable Template 6/21/2025	Email Subject • Body •	Sending Assignable Template B I U Format E E E E E @RecipientName, Please review and sign @DocumentName. Thank You, @SenderName	11
Forms Stages	Com Name			
8 Assign	Assignable Template	escription		Ô

- 11. The assignable form opens along with the Assignable Fields menu on the right.
- 12. You can click on either the radio buttons/checkboxes on the form itself. This also updates the same field under the Assignable Fields menu. Using the menu to check a field instead will also update the form.
- 13. Hovering over the element on the form shows a tooltip of the corresponding field in the menu.

Assignable Templa		E Collapse Signers Save	X Cancel E Collapse Fields
Stage 1 Recipients	A text element A signe ure element A signe ure element A signe ure element Required checkbox Checkbox Data1 Add Payment Method Add Payment Method Add Credit Card Add eCheck		Email Not Required Radio Button Data 2 Checkbox Data 2 Required Form Data Radio Button Data 1 Option 1 Option 2 Clear
	System Number System Type Panel Type		Checkbox Data 1 CM

14. All elements that require initials show in the menu in red before the initials are applied. Notice that mapped fields now display in the box (they previously showed up as blank boxes).

E Collapse Signers	Save	X Cancel E Collapse Fields					
		Assignable Fields 🗸 🗸					
		Assign All					
-		Required					
		Signature 1					
		Initials 1					
•		Radio Button Data 1					
		Checkbox Data 1					
0		Email					
		Not Required					
		Radio Button Data 2					
		Checkbox Data 2					
		Required Form Data 🗸 🗸					
_		Radio Button Data 1 Option 1					

- 15. The red boxes indicate that initials need to be applied. To do so, select a recipient from the right hand side, and either click the Assign All on the right-hand menu, or click on each initials box individually.
- 16. An element that has the initials applied to it is marked as having initials on the right-hand menu.

Assignable Template			Collapse Signers	Save	X Cancel	Collapse Fields
Stage 1 Recipients	Add Credit Card Add eCheck	Required Radio button 1 Non-Required Radio button 1 Required Radio button 2 Non-Required Radio button 2 Non-editable/required mapped field: [Address 1] Editable/required mapped field: [Email]	0		Assignable Fi Required Signature Joseph Initials 1 Radio Butt Checkbox Email Not Require Radio Butt Checkbox Required For Radio Butt	elds Assign All Assign All I I Marina On Data 1 Data 1 Data 2 Data 2 Data 2 Data 2 Data 1

17. When all initials are applied, the status of the form changes to Done, and the menu looks like this:

