

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.

The screenshot shows the 'Add Template' dialog box. The fields are as follows:

- Name:** Assignable Template
- Description:** Description
- Type:** Sales Contract
- Integration:** Managely
- Data Type:** Contract
- Upload PDF:** Select file button and Drop file here to select area.

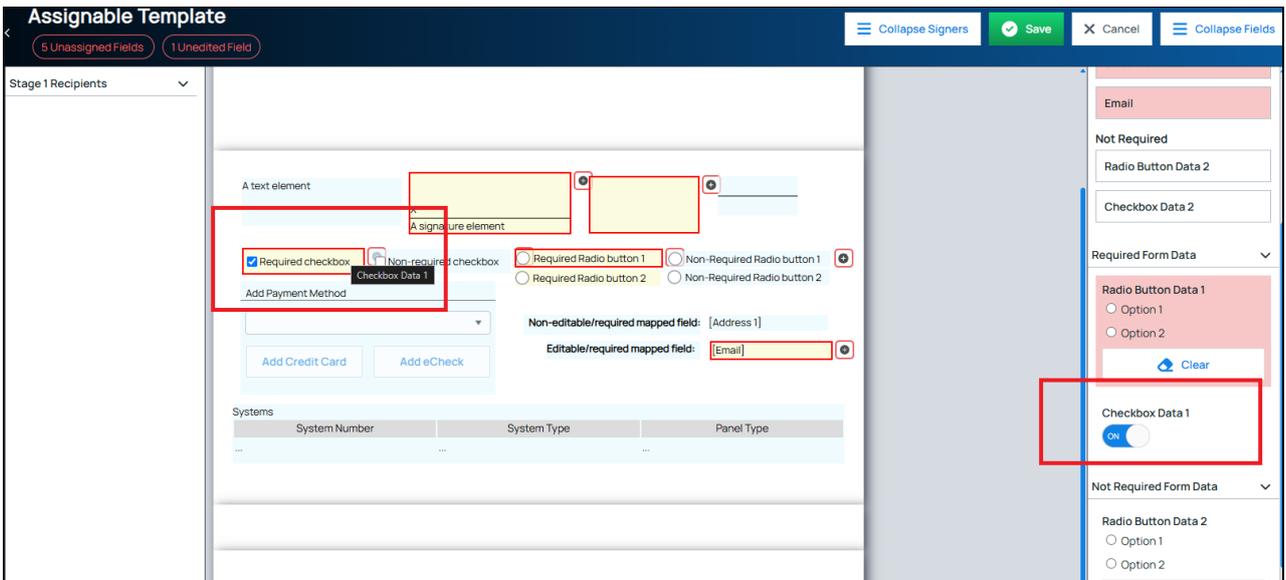
At the bottom of the dialog are **Save** and **Cancel** buttons.

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:

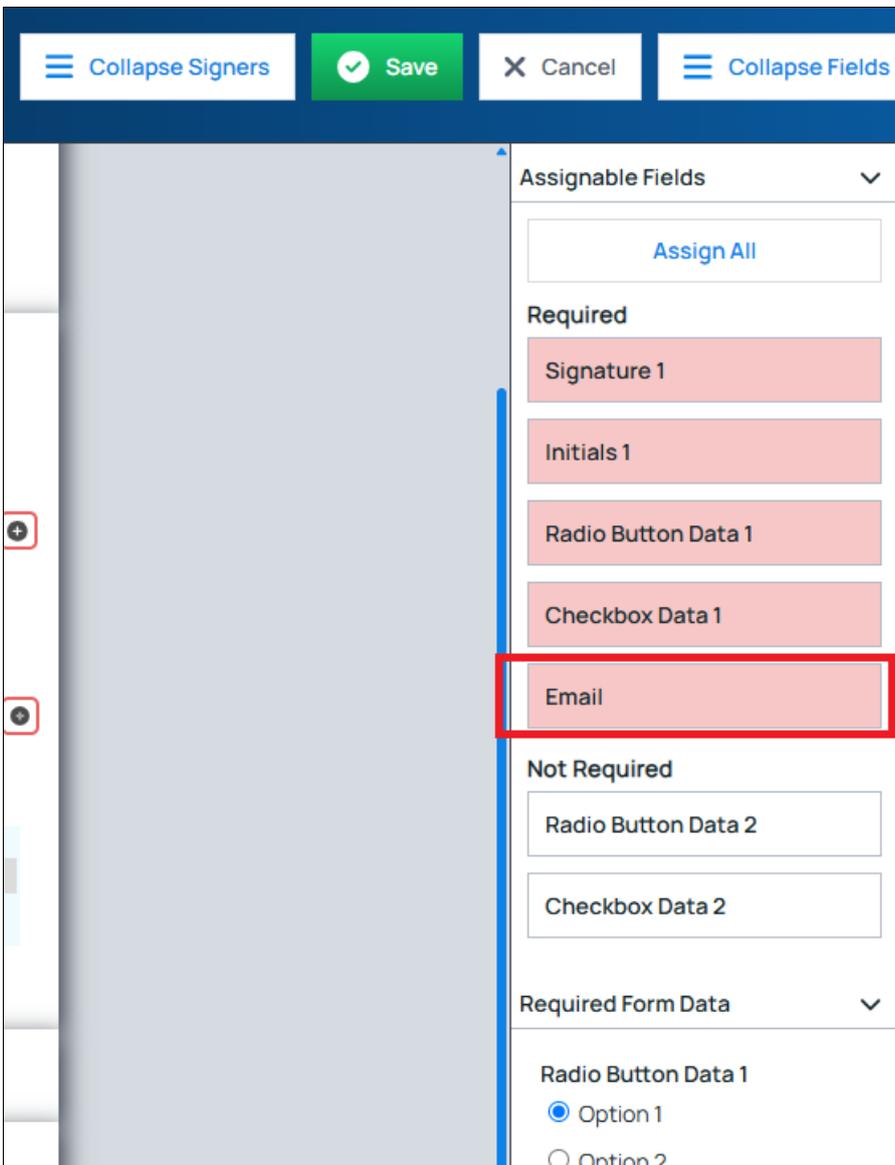
7. Click the **Save** button and go back to the Templates screen.
8. Click the **Send Template** button.
9. A dialog form opens. Type a name and choose the template you created and a contract/customer (the depends on the type of template you created).
10. In the page that opens, find and click the **Assign**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

Status	Form Name	Description
Assign	Assignable Template	

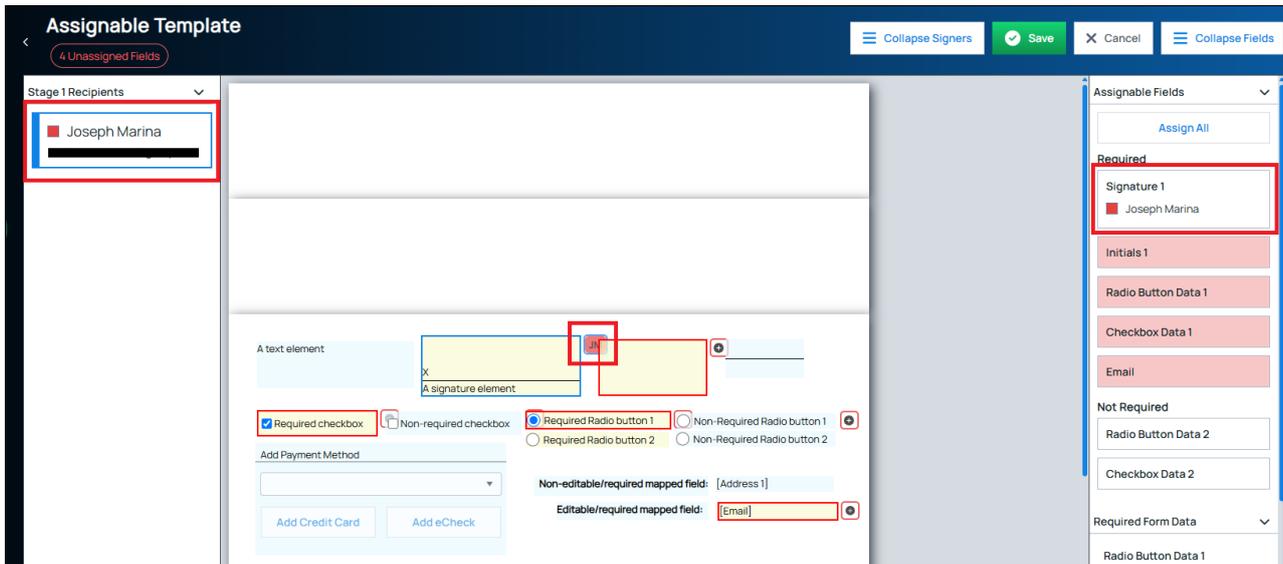
11. The assignable form opens along with the Assignable Fields menu on the right.
12. You can click on either the radio buttons/checkboxes on the form itself. This also updates the same field under the Assignable Fields menu. Using the menu to check a field instead will also update the form.
13. Hovering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



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).



- 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.
- An element that has the initials applied to it is marked as having initials on the right-hand menu.



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

Assignable Fields



Assign All

Required

Signature 1

Joseph Marina

Initials 1

Joseph Marina

Radio Button Data 1

Joseph Marina

Checkbox Data 1

Joseph Marina

Email

Joseph Marina

Not Required

Radio Button Data 2

Checkbox Data 2