Sending Customer Level eForms

04/29/2024 3:55 pm EDT

You can upload a customer level eForm two different ways. Follow the steps below and choose the one that works best for you

1) Log into the customers page in question, click on the Utilities tab below, click the eForms tab and push the add eForm button

2) Add a Name, Description, select a Template and Save

3) You will be taken to the assignee screen and you can send the eForm to the recipient

4) If you prefer you can do this from eForms by logging into eForms, click on the Send Template(s) button fill out the Name, Description, Templates, select the customer and save

5) You will be taken to the assignee screen and you can send the eForm to the recipient