Manage Templates

Form/Flow and control templates are managed by the Live Forms tenant admin. Forms/Flows can be published as templates by the tenant admin or by any designer user in the tenant but only the tenant admin can permanently remove templates from the database or add them to the New Forms Wizard. Template menu items are only accessible if you are logged into Live Forms.

Manage tenant :: mycompany (My Company Tenant)

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Manage Form and Flow Templates

Form/Flow Templates can be permanently removed from the database or forms can be added to the new form wizard which appears every time you create a new form by clicking the

icon on the Forms Home Page. Login as the tenant admin. Click **Manage Form/Flow Templates** or **Home** then **Templates** on the left sidebar.

You will see the list of published forms in a table with the following information:

- The name of the form/flow template and it's form/flow ID i.e.**ID: _J1XuIGF9EemFgY-al39GrA**.
- The description of the form/flow template that was entered when it was published.
  - The tenant admin can test the template by clicking

    (the Try icon)— the template displays as a fully functional form so you can enter and validate data before deciding whether you want to use it. Note the Try count in the Counts column will increase each time the Try icon is clicked.

  - The Create icon adds the template to an application by selecting it from the dropdown.
  - The tenant admin clicks the

    icon to remove the form/flow template from the database.
  - If the published form is not added to the New Form Wizard, clicking the

    icon will add it. Notice **Add to Wizard** changes to **Remove from Wizard**. Click this to remove the form template from the wizard. The New Form wizard is only available for Forms.
- The type of template - Form or Flow.
- The tags associated with the template when it was published.
- The categories the template was assigned to when it was published.
- The Install and download counts will increase each time an Installable template (selected by the frevvo global template administrator) is downloaded/installed from the frevvo website. The Try count increases each time the Try icon is clicked.
- The time/date when the template was published and the user id@<tenant name> who published it.

Form and Flow Templates

Name	Description	Type	Tags	Categories	Counts	Created By
BensenvilleLoanApplication ID: _yyTlwOqwEemIhJQqXNsWyA	No description provided Try Create Remove Add to Wizard	Form	loan, application		Install: 0 Try: 0 Download: 0	designer@frevvodocs on Oct 09, 2019 at 16:21 UTC
ClinicLocations ID: _wnqdMOqwEemIhJQqXNsWyA	No description provided Try Create Remove Add to Wizard	Form	clinic, locations		Install: 0 Try: 0 Download: 0	designer@frevvodocs on Oct 09, 2019 at 16:20 UTC
EOBWorkflow ID: _4-j2sOqwEemIhJQqXNsWyA	No description provided Try Create Remove	Flow	employee, workflow		Install: 0 Try: 0 Download: 0	designer@frevvodocs on Oct 09, 2019 at 16:21 UTC

Notice the Add the Wizard option is only available for forms. Workflows will not have this option.

This is how the New Form Wizard looks after the Expense Report, Vacation Request and Consultant Time Sheet templates forms are added.

SELECT A TEMPLATE

Blank
ConsultantTimeSheet
ExpenseReport
VacationReq

Template

Please select a template. Your new form will be initially created with fields from the selected template.

Finish

Manage Control Templates

Control Templates, added by designers in a tenant, can be deleted from the database by the tenant admin. Click **Manage Control Templates** on the tenant admin page. There you will see the list of published controls and can remove them one by one.

Control Templates

Name	Description	Categories
Last Name	Try Remove	
First Name	Try Remove	
SSN	Try Remove	
DOB	Try Remove	
Home Phone	Try Remove	