PERSONAL APP · FREE & PRO

How to use Tempified

From your first template to encrypted sync.

Tempified turns your repeated writing, like support replies, SOPs, order confirmations and intake scripts, into fill-in-the-blank templates. This guide covers every part of the personal app.

`app.tempified.online — your workspace`

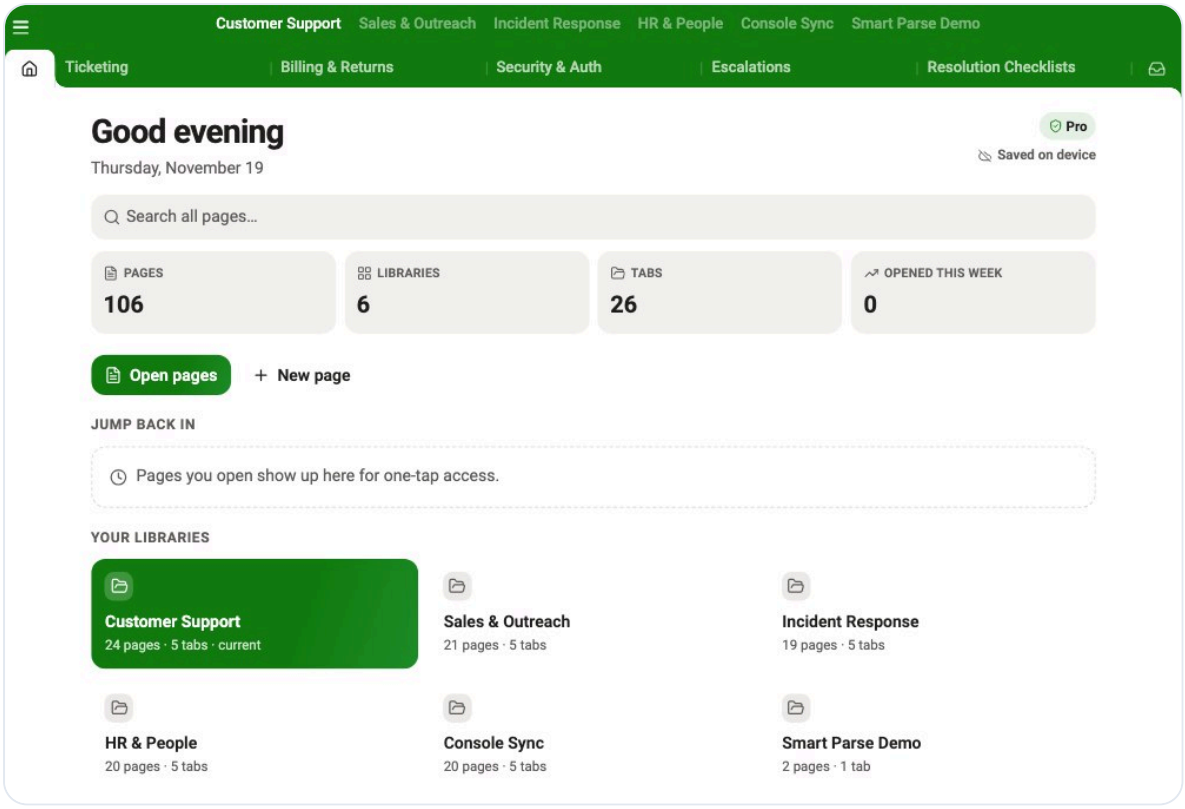
How it works, in three steps

Build once — write a template with dynamic fields in the Builder tab. **Fill in seconds** — in the Maker tab, fill the fields (or paste a whole record to auto-fill several at once) and watch the output render live. **Send it** — copy the result, or launch straight into email, SMS, Slack, Teams, WhatsApp, or a phone call, pre-filled with the rendered text.

The Home tab

Your dashboard: stats, recents, pinned, and libraries

Home is the tab you land on — a dashboard for the workspace, not another place to write templates. It surfaces what you actually reach for: stats, what you opened recently, what you starred, and every library you have, all in one glance.



Header & plan

A time-of-day greeting and today's date, with your plan badge (Free, Pro, or Team Console) at the right. On Pro, the badge sits above a sync status — **Synced 5m ago**, **Syncing…**, or **Sync issue** — that you can tap to sync right away, plus a **Version history** link for restoring an earlier backup.

Search

The search box at the top looks through every template in every library at once — title, tab, notes, and content — and shows the top eight matches. Click one to open it, or star it right from the results.

Stats

Live counts for **Pages** (templates), **Libraries**, **Tabs**, and **Opened this week** — a quick pulse on how the workspace is being used.

Quick actions

Open pages (the Maker), **New page** (the Builder), **Import a library**, and **Settings** — the things you do most, without digging through the menu.

Pinned & Jump back in

Star any template to pin it here permanently. Below that, **Jump back in** lists the eight templates you opened most recently (pinned ones aren't repeated), so the last thing you filled is always one tap away.

Libraries & Tabs

Every library you have, with its template and tab count. The current one is highlighted; clicking another switches to it everywhere and opens it in the Maker. **New library** adds one. Below that, the tabs in your current library appear as chips that jump straight to that tab in the Maker.

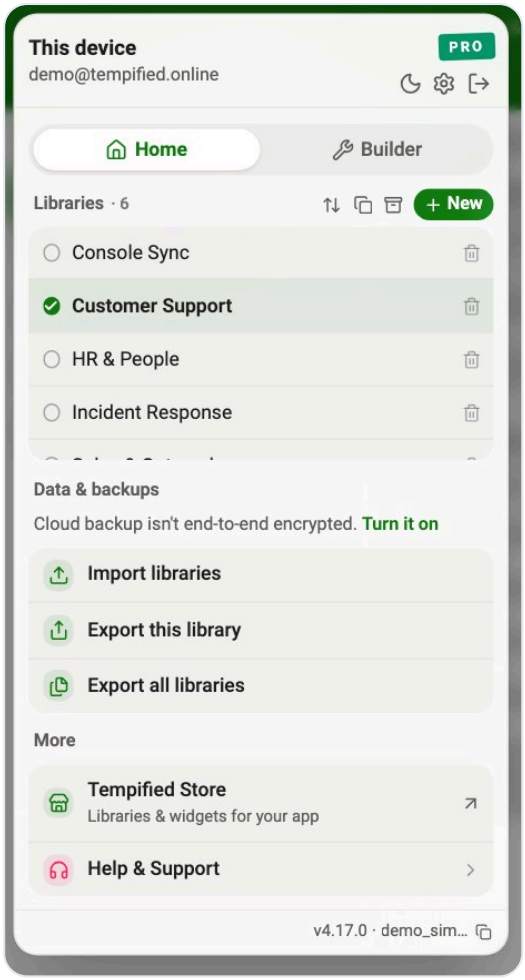
- **Get started in 3 steps** — a new, nearly empty workspace shows a short checklist (write a template, organize it into tabs, fill and copy it in the Maker) that ticks off as you go.
- **Console tools** — if your team has given you elevated Console access, shortcuts to the Console screens appear under the quick actions, with a red badge counting template requests waiting for review.
- **Tip of the day** — once the workspace is set up, a short tip about a feature you might have missed appears near the bottom and changes daily.
- **Plan footer** — Free shows what Pro adds, with an upgrade button. Pro shows whether end-to-end encryption is on for your cloud backup (tap to open Settings). Team Console notes that sync is managed by your team's plan.



The menu

Libraries, backups, and account

Tap the hamburger icon at the top left, any time, to open the menu. It's where libraries are managed, backups happen, and your account lives — everything that isn't a template itself.



Account

Name/email and plan, with quick icons for theme, Settings, and closing the menu. Free users get **Already have Pro? Sign In** here. **Sign out** clears this device's copy of your templates and cloud cache, so on Free export a backup first; on Pro everything comes back when you sign in again.

Home & Builder

Jump to the Home tab or the Builder — same as the header's buttons. On a workspace where you have elevated access, **Console tools** appear here too.

Libraries

Sortable, clonable, with a one-tap **+ New** and an **Archive** for anything deleted — recoverable for 30 days, or any time by a Workspace admin.

Data & Backups

Import JSON Library (one or several files), **Export** the current library, or **Export All** as one file per library. On Pro it also shows cloud sync and whether encryption is on, **Locked**, or ready to **Turn it on**. **Install PWA App** installs Tempified as its own app.

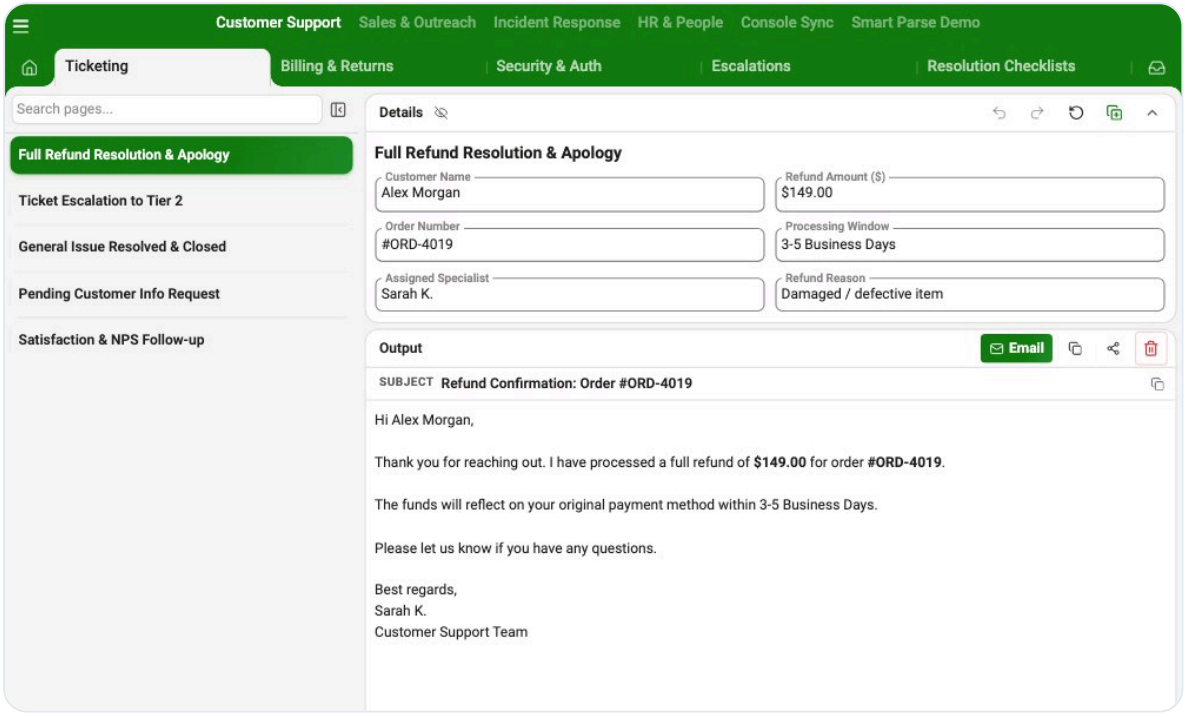
Help & Support

Chat straight with support from inside the app — no need to leave and find an email address. Your device ID sits at the bottom with a copy button, in case support asks for it.

The Maker tab

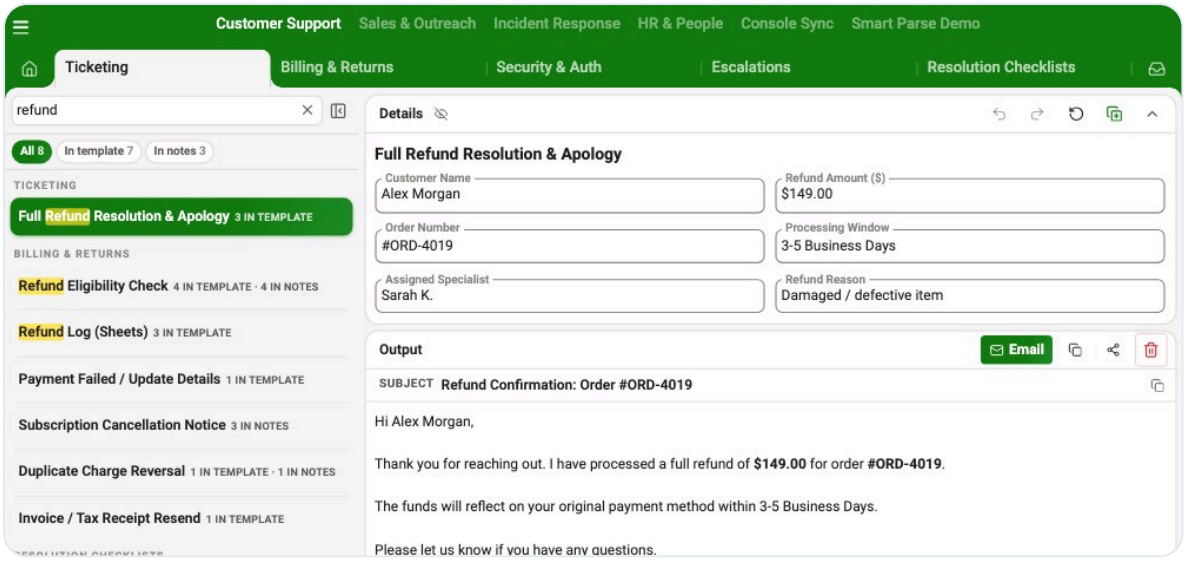
Fill in a template, get finished output

The Maker is where you use your templates every day. Pick a template, fill in its fields, and copy or send the finished text. Nothing here changes the template itself; that happens in the **Builder**.



In the default layout the template list runs down the left and **Output** takes the rest of the width. On a page without notes, **Details** sits above Output with its fields side by side (a field alone on its row takes the full width); on a page with notes it shares the left column with the list, and the notes go below Output. Change it under **Appearance → Layout** in Settings.

Finding a template



- **Tabs** along the top of the app split a library into groups; click one to see its templates, organized into sections.
- **Search** looks through every template's title, body, and notes. While you search, the **All**, **In template**, and **In notes** chips narrow where it looks and show how many matches each has.
- **Hover preview:** point at a template in the list to see its filled output and notes before you open it.
- An **amber dot** beside a template means its notes changed since you last read them.
- **Copy on click** templates copy themselves the moment you click them in the list.
- The list can collapse to a narrow rail, and opens again when you hover over it.

Filling in Details

- **Smart inputs:** each field matches its variable type. Phone numbers format as you type, dates and times get a picker, dropdowns get a list, and linked fields fill themselves from another field.
- **Auto-fill:** paste a whole record or a spreadsheet row into a paste box and several fields fill at once, with a toast saying how many were filled. If a date rule finds several dates, that field becomes a list of all of them with the first one picked — see Auto-fill from pasted text.
- **Repeatable blocks and optional sentences:** add another entry with **Add**, or tick a checkbox to include a sentence — see Repeatable blocks.
- **Recipient card:** templates with an action link can show the recipient (phone, email, or channel) as an editable field above the others. Email templates also show CC and the subject, with a **Copy subject** button and any subject-only fields right below it.

- Every field has its own copy button for grabbing just that value.
- Multi-line fields and Text Parse inputs stay compact. Hover to reveal the enlarge button, then open an expanded editor attached to the field. Your text stays in the same input.
- **Hide Details** folds the fields into a thin strip to give Output and notes more room; **Show Details** brings them back.

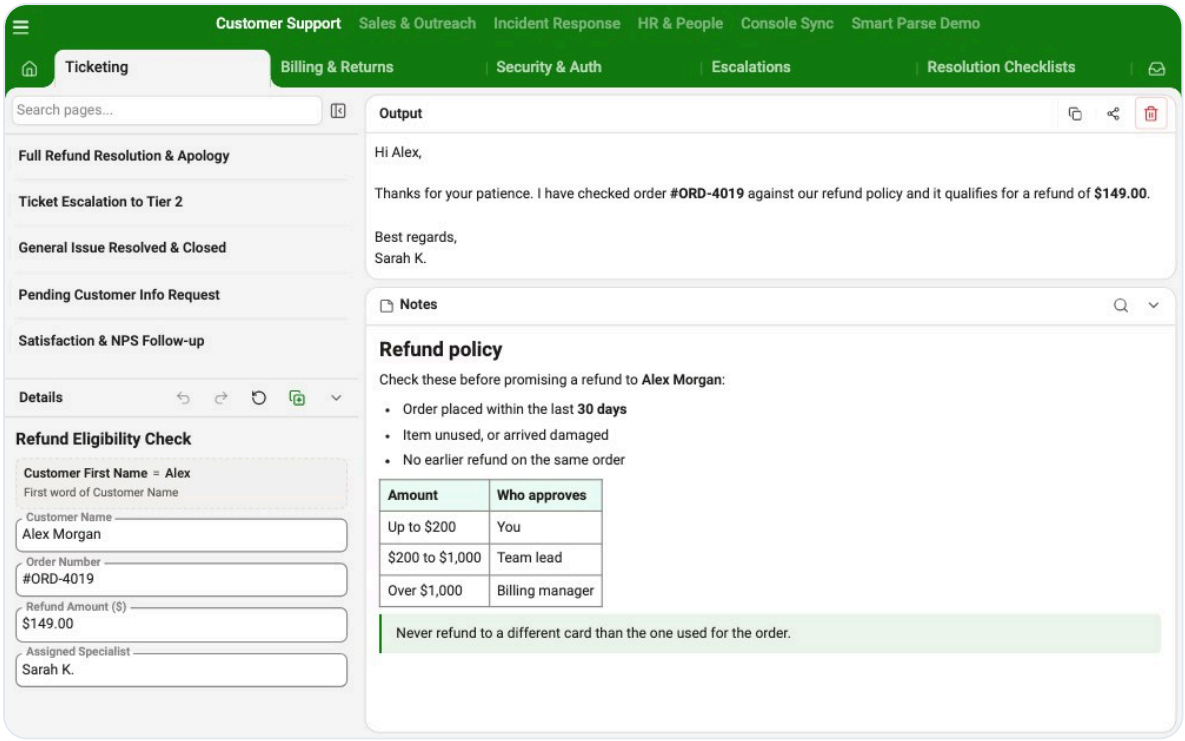
The toolbar

- Output updates automatically as you fill in the fields. **Fill in & copy**refreshes the template from the current fields and copies it in one click; there is no separate Fill in button.
- Toolbar actions start as icons. Hover or focus a button to reveal its label; Copy and Clear are icon buttons too.
- **Undo / Redo** keeps up to 50 Maker history entries, covering field values, output, and checklist state.
- **Clear fields** is double-guarded: press once to arm it, then Enter to confirm, so a stray click never wipes a half-filled form.

Output

- The finished text renders on its own a moment after you stop typing, and you can edit it directly before sending without changing the template. If you change a field after editing, a warning reminds you to refresh from the fields with **Fill in & copy** before using the text.
- **Copy** copies it with its formatting intact, ready to paste anywhere.
- **Send buttons** open Email, SMS, WhatsApp, Slack, Teams, RingCentral, a phone call, or a custom link with the message attached — see Sending your output.
- **Share (Pro)** sends someone a fill-only form for this template and collects their answers in **Responses**.
- **Page notes** appear beside the form, read-only, with a checkbox to confirm you've read them — see Page notes.
- **Spreadsheet output:** Sheets templates get a Grid/Text view, and sheet rows get their own **Copy row** button — see Sheet rows.

Reading notes



- A template's notes show read-only beside the form, with their formatting, tables, pictures, and links. Any variable in a note shows what you've typed into that field.
- Collapse the notes panel or drag its edge to resize it. The search box inside it jumps between matches with next and previous.
- Opening a template from a search with **In notes** highlights the matching words in its notes.
- On Team Console, tick **I have fully read and understand this topic** in the Notes header once you've read it. A tick stays until the note changes; then it asks again, for *the updated topic*, and the template gets an amber dot in the list.
- A template with notes but no body is a reference page: its notes take the whole Output area. More in Page notes.

Keyboard shortcuts

- `Enter` in a field does **Fill in & copy** (`Shift` + `Enter` adds a new line in a multi-line field).
- `Enter` anywhere outside a field copies the current output.
- `Cmd/Ctrl` + `Z` undoes; `Cmd/Ctrl` + `Shift` + `Z` or `Cmd/Ctrl` + `Y` redoes.
- After pressing **Clear fields** once, `Enter` confirms and `Esc` cancels.

Auto-fill from pasted text

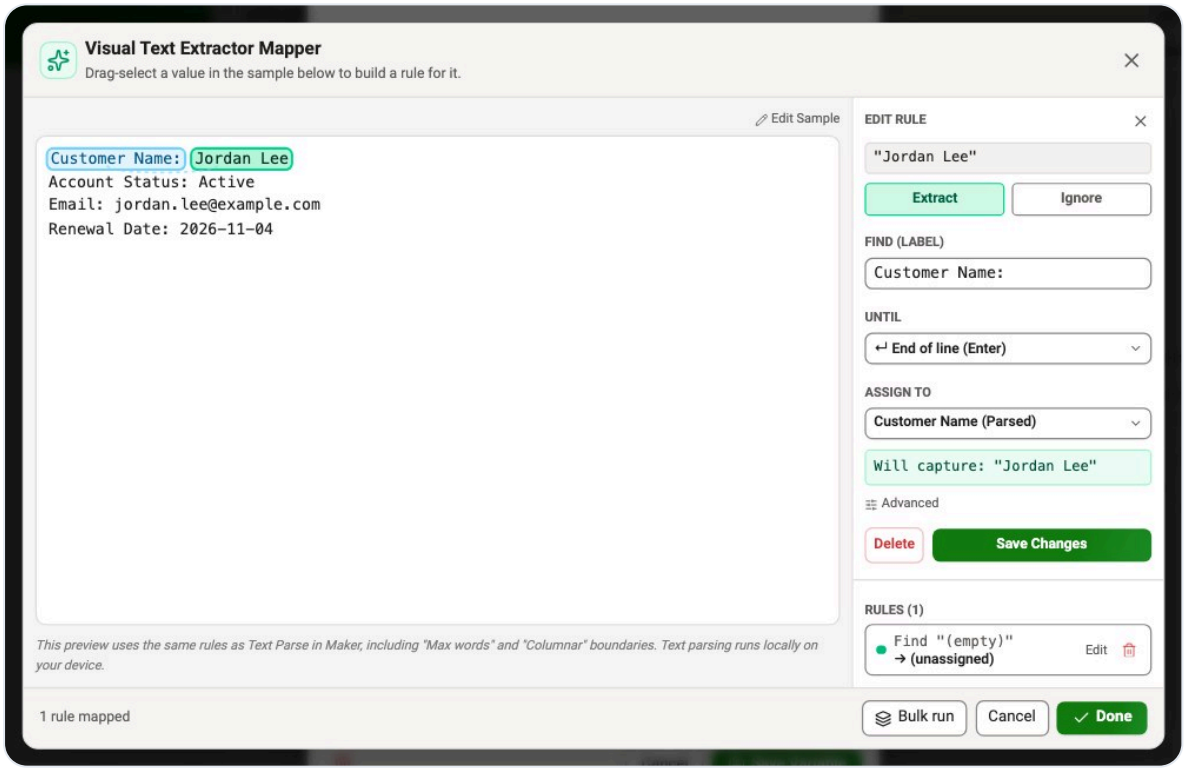
Paste a record, fill several fields at once

Tempified offers two powerful auto-fill extraction methods: **Text / Label Parsing** (for freeform emails, tickets, and CRM records) and **Excel / Spreadsheet Grid Extraction** (for tabular copy-pastes). Both populate multiple template fields in a single motion.

1. Text / Label Parser (Visual Rule Mapper)

Label-Based Extraction

Instead of writing matching rules by hand, paste a real example of the text you'll be extracting from and drag-select the value you want. The tool figures out the label to look for and where the value ends.



Blue = the label being searched for. Green = the value it captures. The dashed line connects them to the same rule.

1 **Paste a sample record**
Drop in one real example — a CRM ticket, email notification, or form submission.

2 **Drag-select a target value**
Highlight any word or phrase. Tempified auto-detects the label before it and where it ends.

3 **Assign to a variable**
Choose which template field should be filled by the captured value.

4 **Live preview verification**
The “Will capture” indicator validates that the extracted text matches formatting expectations.

Rule options

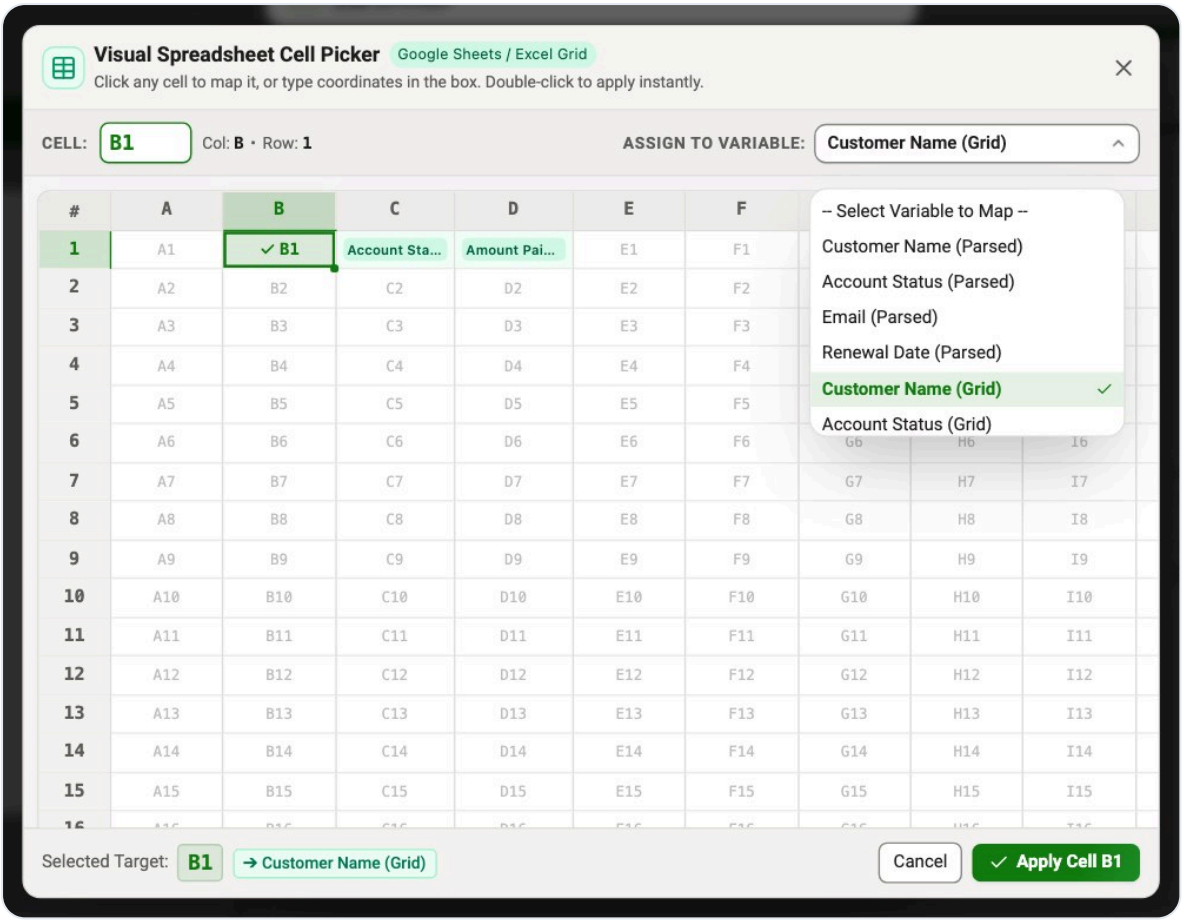
Each rule says which label to look for and where the value stops. Fine-tune it in the rule’s popover in the mapper:

- **Until:** end of the line, end of the next line, end of the line before, the next space, a comma, a period, the end of the text, or your own stop text. **Columnar block** reads a value laid out like a table cell, including lines that continue in the same column.
- **Skip matches:** when the label appears more than once, skip that many before capturing (0 takes the first).
- **Max words:** keep only the first few words of the value (0 means no limit).
- **Ignore rules:** mark text that should never be captured, such as a repeated footer or a signature, so other rules look past it.
- **Date and time rules:** instead of a label, find any date, time, or date-and-time in the text. When there are several, the Maker offers all of them in a list.
- The captured value is then formatted by the variable it fills — letter case, date format, data cleaning, and so on.

2. Excel / Spreadsheet Grid Extractor (Visual Grid Picker)

Spreadsheet Grid Mapping

When dealing with Google Sheets, Excel tables, or Airtable exports, copy the row and paste it directly. Tempified reads specific cell coordinates (e.g. `B1`, `C1`, `D1`) using the visual point-and-click cell picker with mandatory variable assignment.



Select a coordinate (e.g. B1), open the **Assign to Variable** dropdown to link your target field, and apply. The button remains locked until a valid variable is assigned.

1 **Click target cell coordinate**
Click any cell on the interactive matrix (e.g. B1, C1, D1) or type the coordinate into the Formula Box.

2 **Assign to Variable dropdown**
Choose which template field should receive this cell's value from the dropdown list. Mapping cannot be applied without an assigned variable.

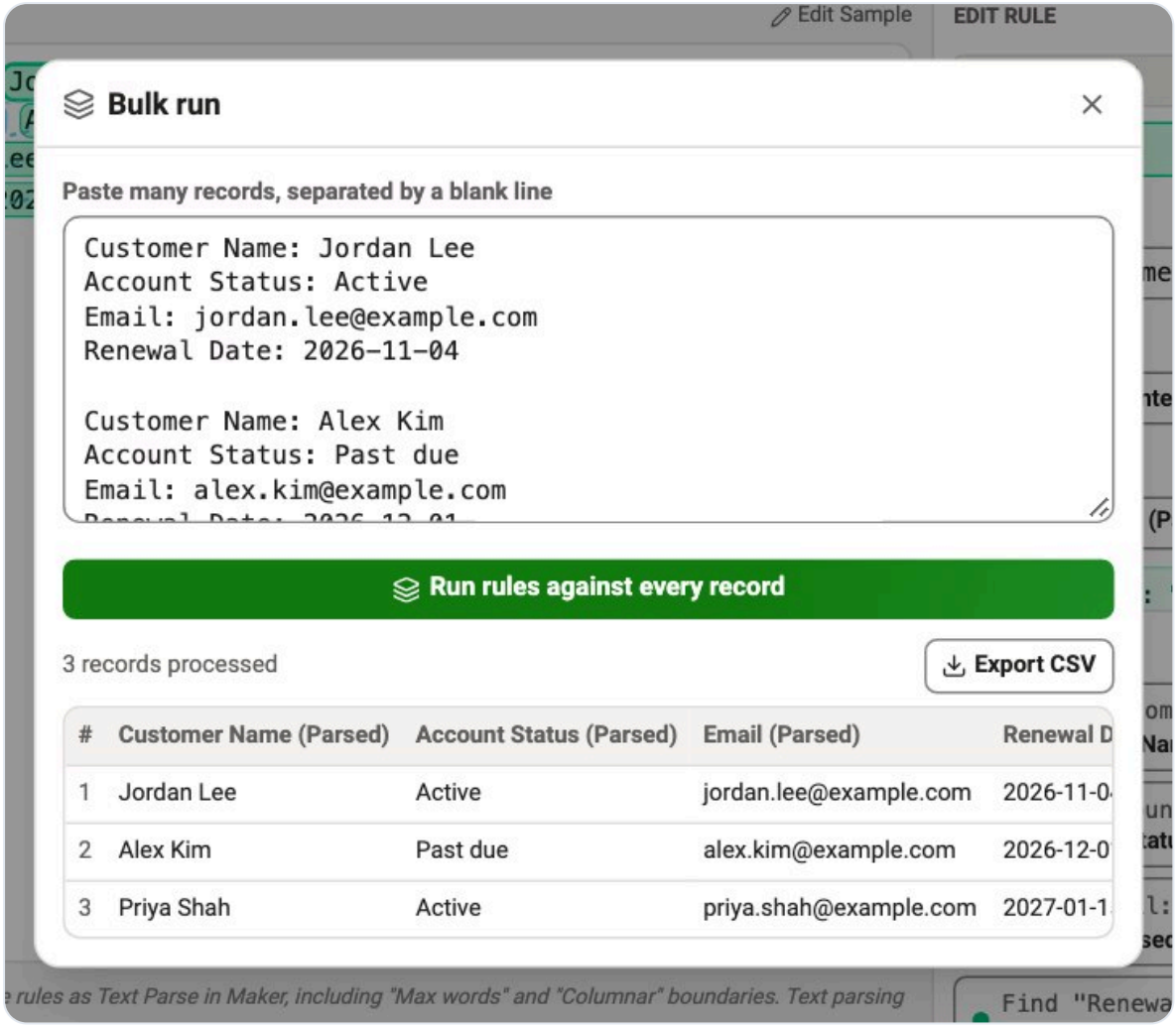
3 **Apply and map multiple cells**
Click "Apply Cell" to save the mapping. Add rows for every spreadsheet column your team needs in the final message.

4 **Fill fields from one spreadsheet paste**
In Maker, paste any copied row from Excel or Google Sheets — every mapped field populates instantaneously.

3. Bulk run

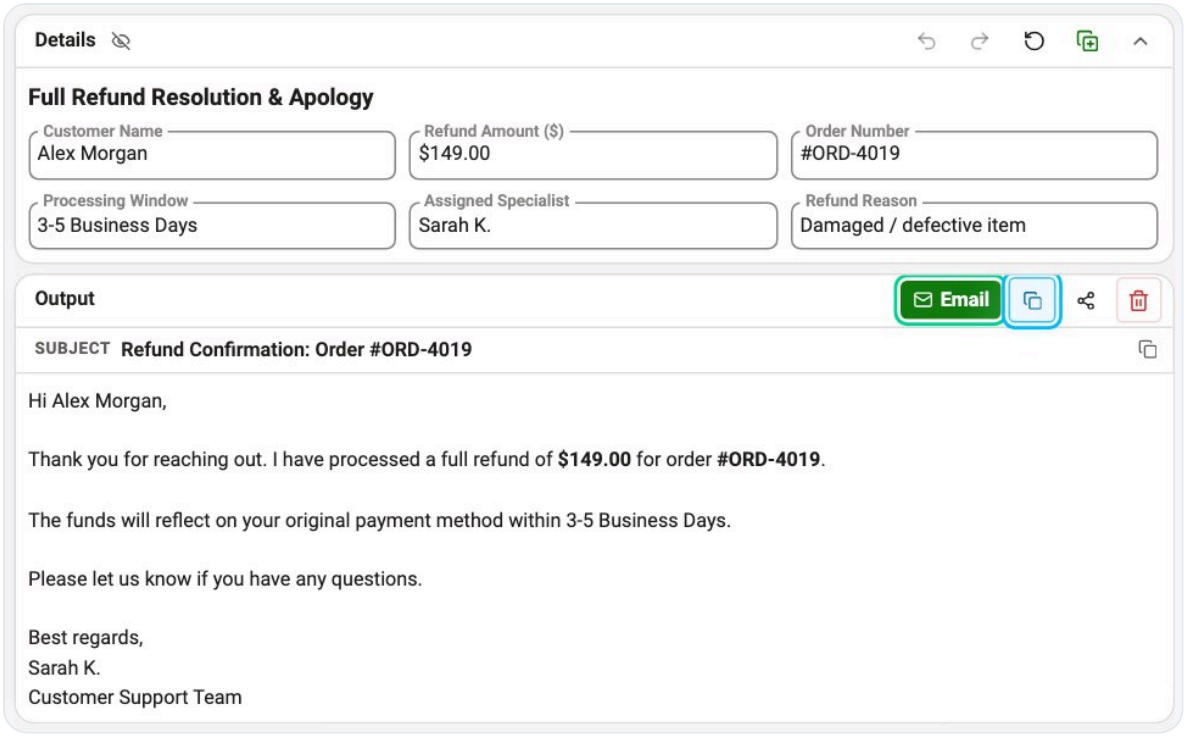
Got a stack of records instead of one? In the extractor mapper, open **Bulk run**, paste many records separated by a blank line, and run your rules against every record at once. Each record becomes a row with one column per mapped field, and **Export CSV** downloads the

lot for Excel or Google Sheets. Map at least one field first; Bulk run uses the same rules as a single paste.



Sending your output

Copy it, or launch straight into email or chat



Once a template is filled in, you can copy the result or send it straight to the app it's for. Send buttons are set up per template in the Builder under **Action links**.

Action link	What you set in the Builder
Email	To, CC, and Subject, each of which can include variables (for example `{{Customer Email}}`), plus optional subject rules.
SMS, WhatsApp, RingCentral, Phone call	The recipient's phone number, typed in or taken from a variable such as `{{Customer Phone}}`.
Slack	A channel or user ID (for example `C0123456789`), or a variable.
Microsoft Teams	The recipient's email or a channel, or a variable.
Custom link	A button label and any link or app protocol, with placeholders for the filled-in text and your variables.

What happens when you press send

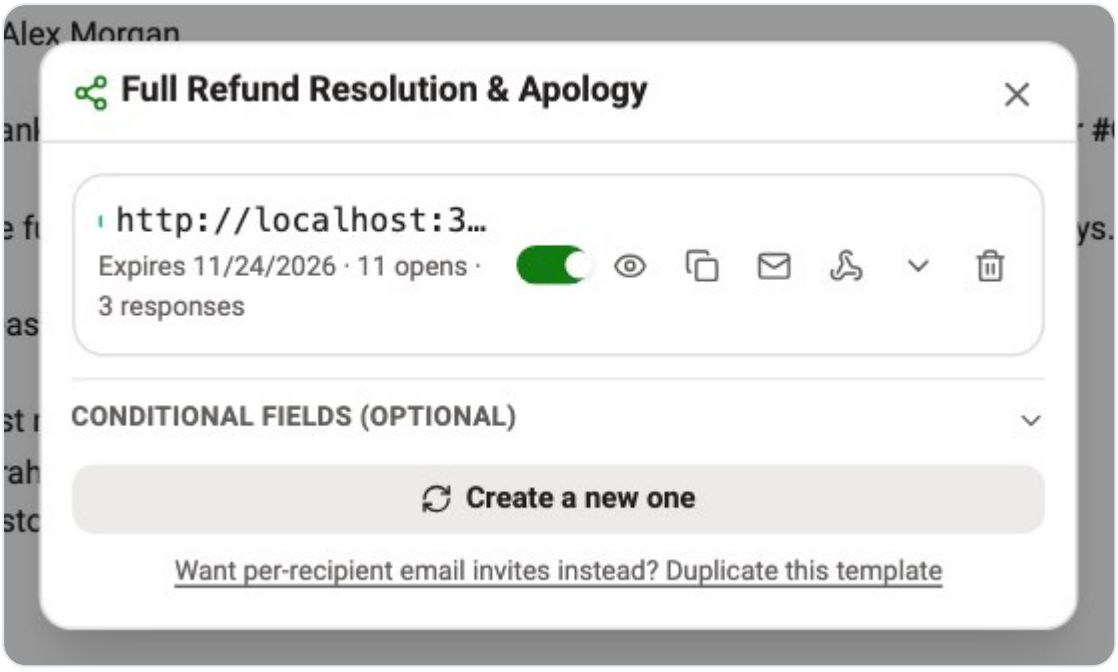
- **Attach in link:** the filled-in text goes into the message itself (an email body, a text message, a chat draft), ready for you to review and send.
- **Copy & open:** the text is copied with its formatting and the app opens, so you paste it where you want. Good for long or formatted messages.
- **Attach & copy other:** attaches this template's text and copies a different page you choose, for example a short SMS plus a longer note for your records.

- Review the output before sending. If a stale-output warning appears after you edit it manually, use **Fill in & copy** to regenerate it from the current fields.

- **One-Click Send Buttons:** Templates configured with Email, SMS, WhatsApp, Slack, MS Teams, RingCentral, or Phone Call show a dedicated launch button in the Output toolbar that opens the target app with your message attached (or copies it, if you chose *Copy template & open app* in the Builder). RingCentral opens the desktop app on a computer and the mobile app on a phone. If nothing opens — the app isn't installed on this device — you'll see a short notice saying so.
- **Rich & Plain Text Copy:** Click **Copy** to copy the fully formatted HTML and markdown output to your clipboard with one click, ready to paste into any editor.
- **Per-Field Quick Copy:** Hover over any variable input in the Details panel to copy its clean formatted value individually.
- **Recipient in Details:** Turn on **Show in Details** in the Builder and the recipient (phone number, email, or channel) appears at the top of the Details panel. If the recipient is a variable such as *Driver Phone Number*, you get that field to fill in, and the number you type is the one the send button uses.
- **Editable Output Canvas:** Make quick manual adjustments directly inside the live Output editor before sending, without modifying your base template structure.

Share a fill-only link (Pro)

Need someone else to fill in a template? Open it in the Maker and press **Share**. They get a simple web form with the template's fields — no account, no app — and their answers come back to you in **Responses**.



Public link or email invites

A **public link** is one link anyone can open, with an option to allow multiple responses. **Email invites** send each address its own single-use link, with an automatic reminder after 3 days (switch it off per invite, or resend one yourself). A template keeps the mode you pick first; duplicate it to use the other.

What the form shows

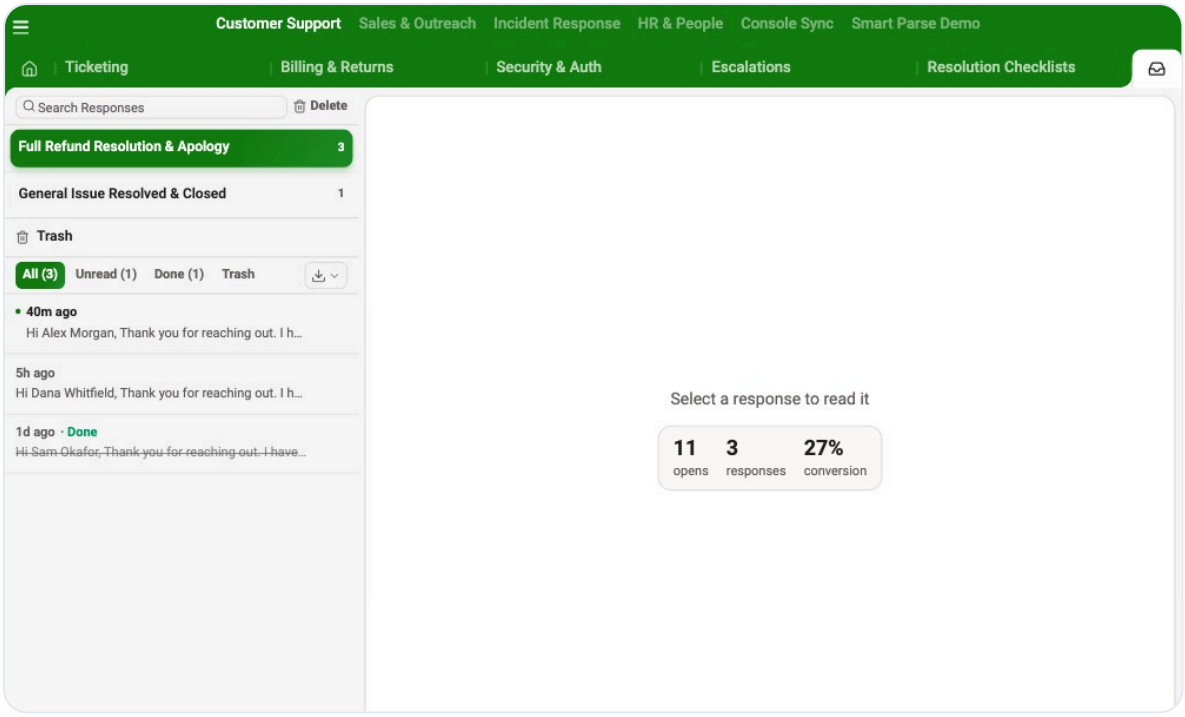
Text, dropdown, date, and time fields become form questions. Add a title and description, choose whether to show a preview of the template, and use **conditional fields** to show a question only when another answer equals a value. **Preview as recipient** shows exactly what they'll see.

Expiry and control

Links expire after 3, 7, or 30 days, a custom number of days, or never. Pause a link to stop new answers for a while, or revoke it permanently. Your logo and brand color from **Share Link Branding** in Settings appear on every public form.

Responses

The **Responses** tab in the header lists every shared template and its answers, with filters for All, Unread, Done, and Trash, and each link's opens, responses, and conversion rate. Search them, mark them read or done, delete them, copy one as text, or export them as CSV (for Excel or Google Sheets), JSON, or a readable text transcript. Deleted templates wait in Trash with their links and responses untouched until restored.

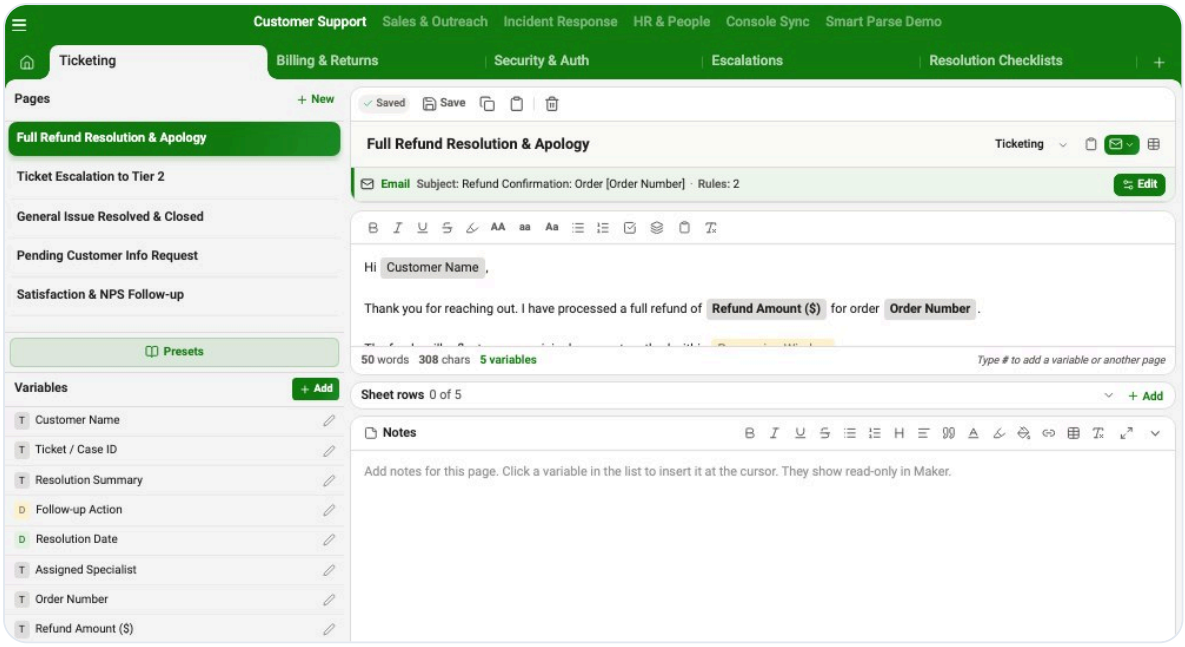


Webhook: add a webhook URL to a link and every new response is POSTed there as JSON, signed with an `X-Tempified-Signature` header so your server can check it came from Tempified. Share links aren't available on Team Console workstations.

The Builder tab

Where templates get written

The Builder is where templates are written and set up. Everything you do here shapes what the **Maker** shows: the fields people fill in, the buttons they get, and the notes they read.



Pages panel

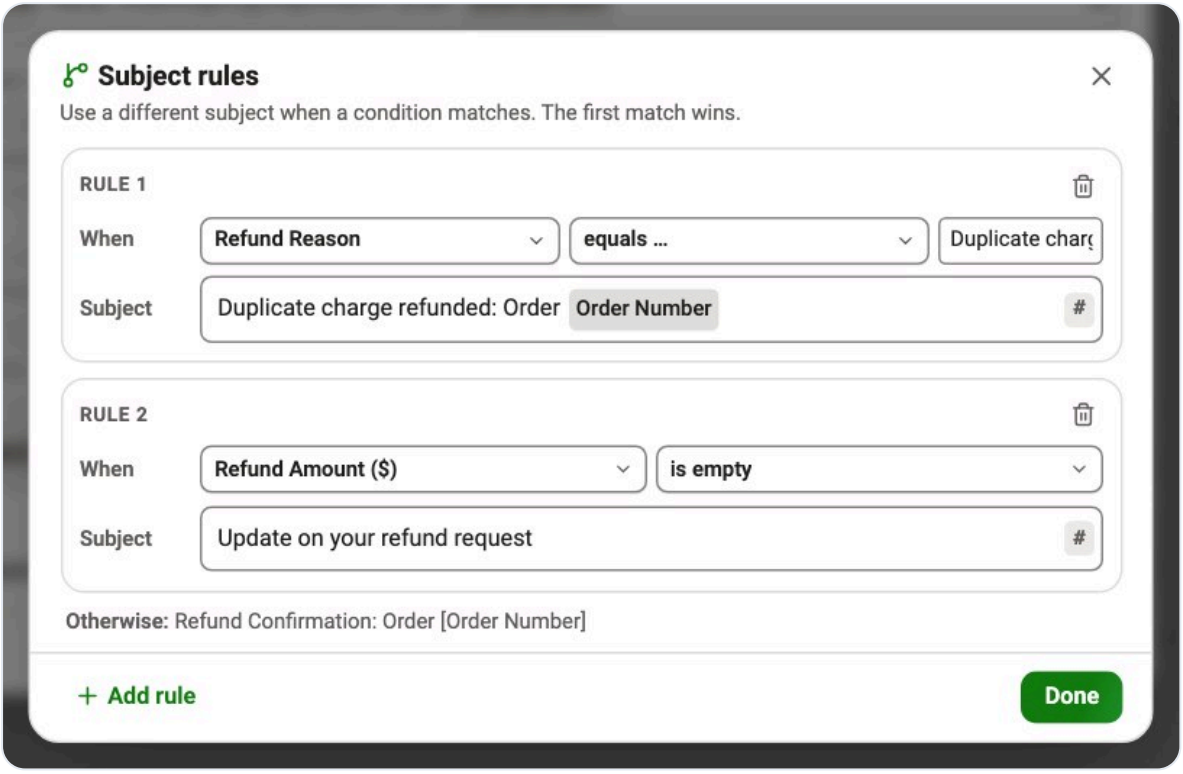
- Every template in the library, grouped by tab and section. Pick one to edit it, or start a new one.
- **Sections:** add one with **Add a section here**, double-click to rename it, and drag it to move it with its templates. Removing a section keeps its templates.
- **Select several** with `Cmd/Ctrl`-click to copy or delete them together. Each template also has **Duplicate** and **Delete**.
- Opening another template saves the one you were editing first, so switching never loses work.
- **Presets:** import ready-made, standardized templates with their variables already set up — see Organizing your templates.

The editor

- Click the page name to rename it, and use **Choose tab…** to put it in a tab.
- Write the body like a document. Type `#` or `{{` to insert a variable, or another page by reference. A list pops up as you type: use the arrow keys, then `Enter` or `Tab` to insert, or `Esc` to dismiss it.
- **Formatting toolbar:** bold, italic, underline, strikethrough, highlight, UPPERCASE / lowercase / Title Case, bulleted and numbered lists, and Clear formatting. A variable chip can take its own style too.
- A counter shows words, characters, and variables. Pictures don't go in the body; put them in the notes.

- **Save** with `Cmd/Ctrl` + `S`; the status shows *Saved* or *Unsaved*. `Cmd/Ctrl` + `B` / `I` / `U` apply bold, italic, and underline, and `Cmd/Ctrl` + `Z` / `Y` undo and redo (200 steps on Pro, 10 on Free).

Page options



- **Copy on click:** clicking this template in the Maker's list copies it straight away.
- **Optional** turns selected text into a sentence the Maker shows as a checkbox; **Repeatable** makes a part the Maker can add more than once — see Repeatable blocks.
- **Action links:** wire the template to Email, SMS, Slack, Teams, WhatsApp, RingCentral, or a phone call, with its own recipient, CC, and subject. Choose whether the recipient shows as an editable field in the Maker.
- **Subject rules** (email): use a different subject when a condition matches, for example when *Refund Reason* equals *Duplicate charge*. A condition can check that a field is filled in, is empty, equals or contains some text, is within a number of days or business days, or is before today. The first matching rule wins; otherwise the normal subject is used.
- **Custom links:** point the button at any link or app protocol (a ticketing tool, a CRM dialer, an internal portal), with the text placed in the link or copied while the link opens. It can even copy a different template.
- **Sheets** turns the template into a spreadsheet row; to add rows beside the text instead, use **Add** in the **Sheet rows** box under the editor — see Sheet rows.

- **Copy template code** copies the template's raw HTML.

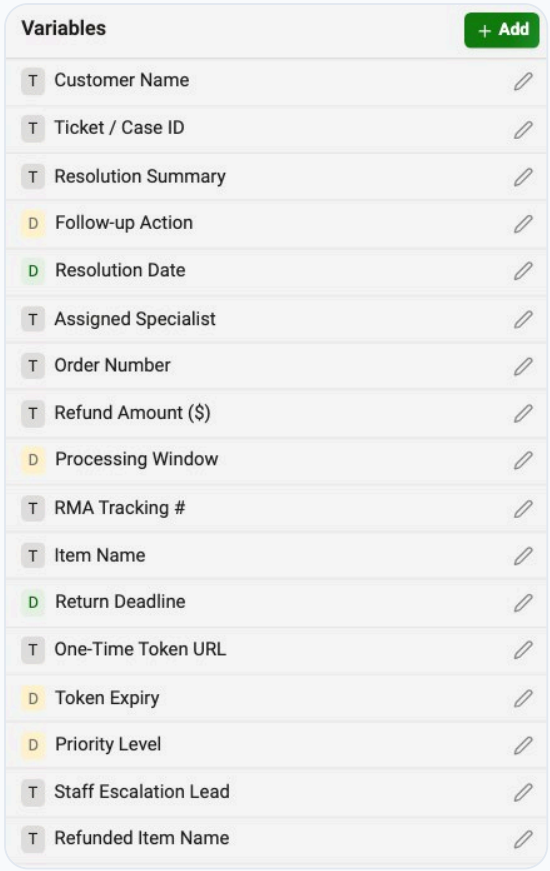
Variables and notes

- **Variables panel:** every field in the library, shared by all its templates. Add one with **Add a new variable** and pick from seven **variable types**; editing a variable updates every template that uses it.
- **Notes:** write the reference notes that sit beside the template in the Maker, with formatting, tables, pictures, and variables — see **Page notes**.
- **On Team Console**, if your admin has turned the Builder on for you, **Submit** sends your changes to them for review — see the **Console docs**.

Variable types

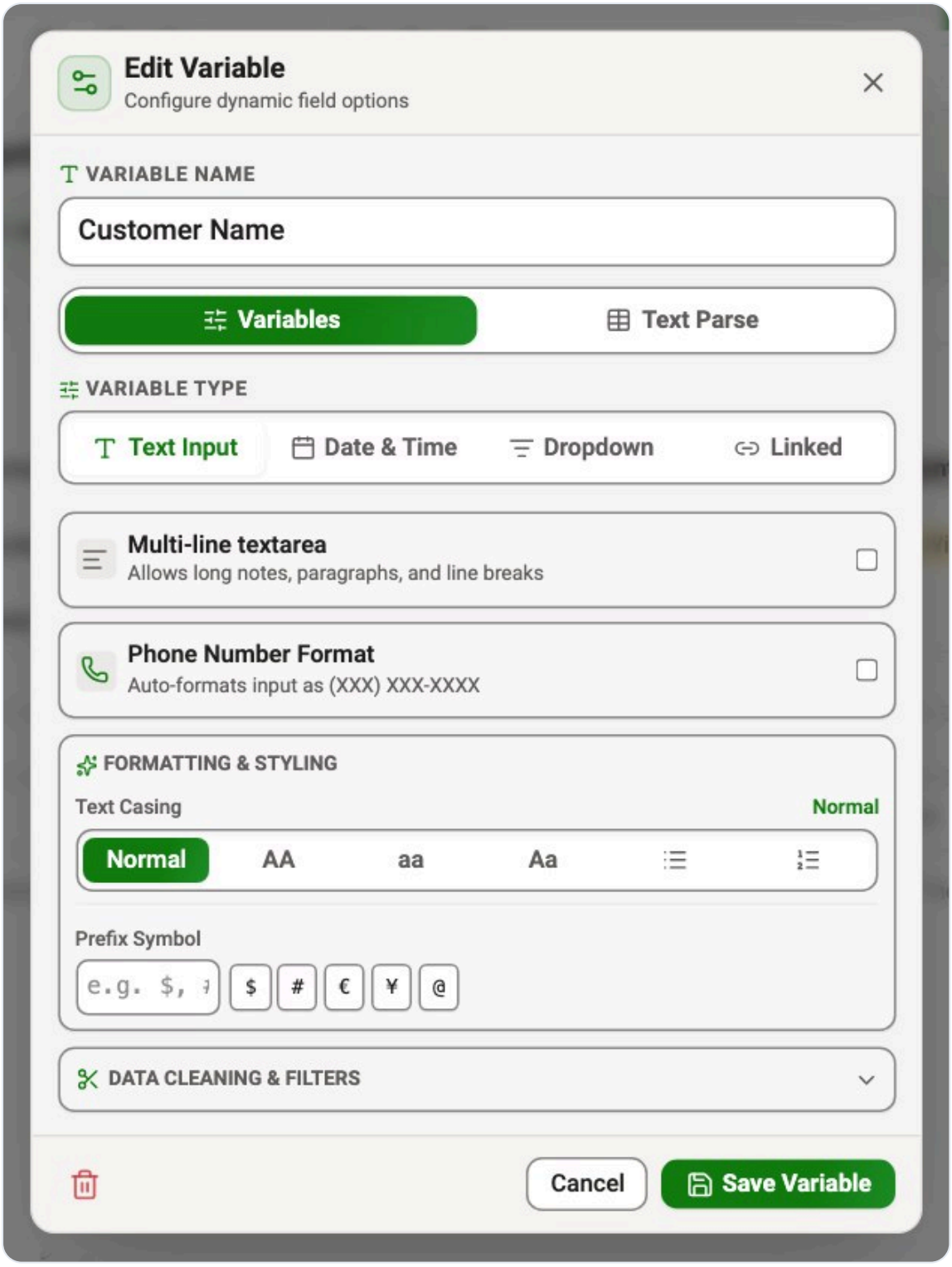
Seven kinds of fillable fields

Every dynamic field in a template is a **variable** — configured once in the Builder and reused across any template in the set. Tempified supports seven specialized variable types tailored for different data inputs, transforms, and automations.



Shared Variable Library

Every variable your team creates is saved into the active library and shared by all its templates. Updating a variable's formatting rules or options immediately reflects across every template referencing it.



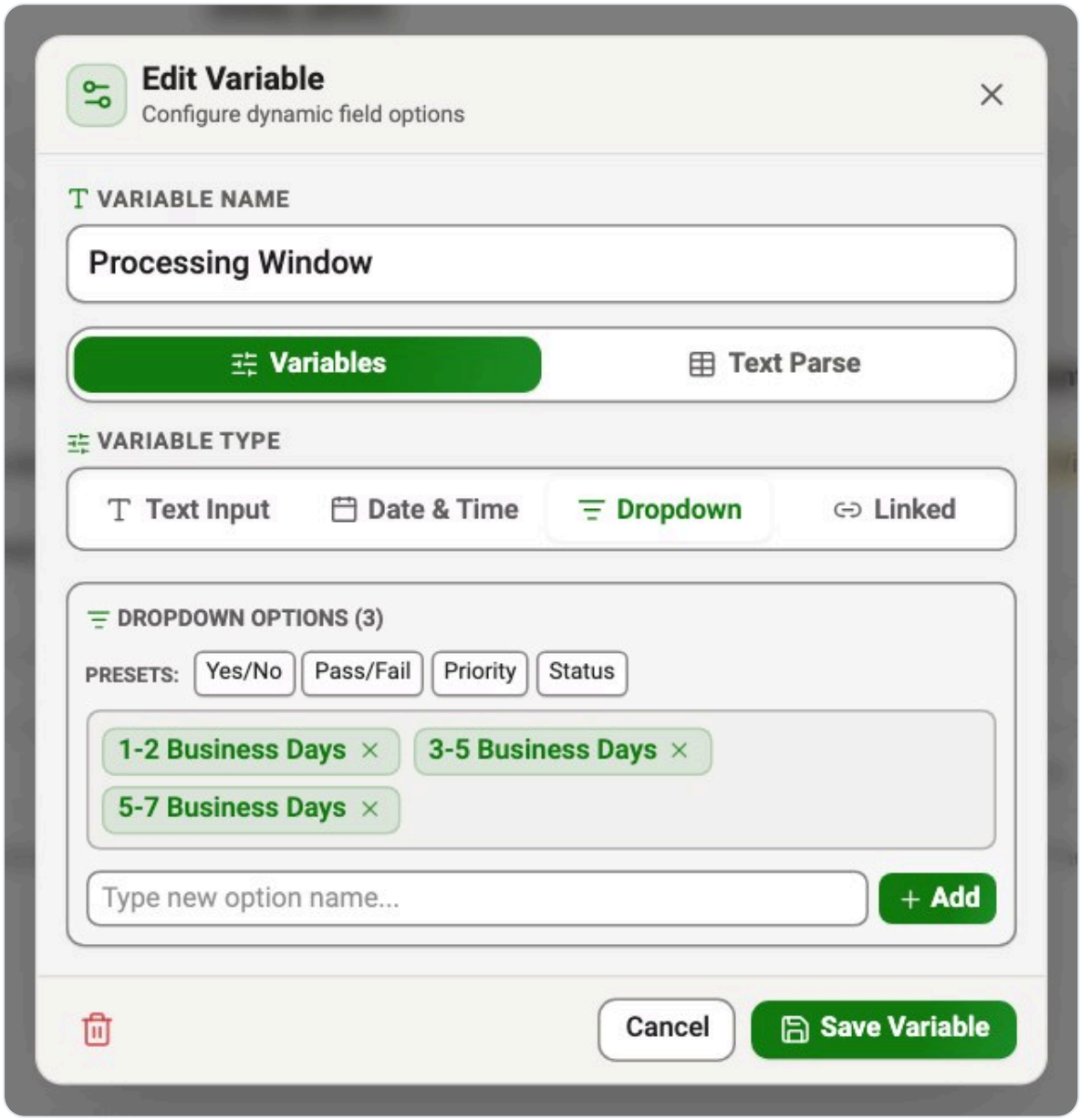
Type 1 · Freeform & Formatted Text

Text Variables

Used for names, IDs, notes, and custom messages. Text variables support rich transformations and formatting rules that apply automatically when the output is rendered.

- ✓ **Casing Transforms:** UPPERCASE, lowercase, or Title Case auto-formatting.
- ✓ **Multiline & Lists:** Preserve line breaks, convert to bulleted lists (•), or numbered lists.

- ✓ **Phone Number Format:** formats digits as `(XXX) XXX-XXXX` while you type.
- ✓ **Prefix Symbol:** put a fixed symbol such as $ or # in front of the value.
- ✓ **Multi-line textarea:** a bigger box for long notes, paragraphs, and line breaks.
- ✓ **Data cleaning:** *Clear Copy* removes leading zeros and trims spaces; *Clear Number* keeps digits only; *Exclude word from output* drops filler such as `N/A` or `None`.



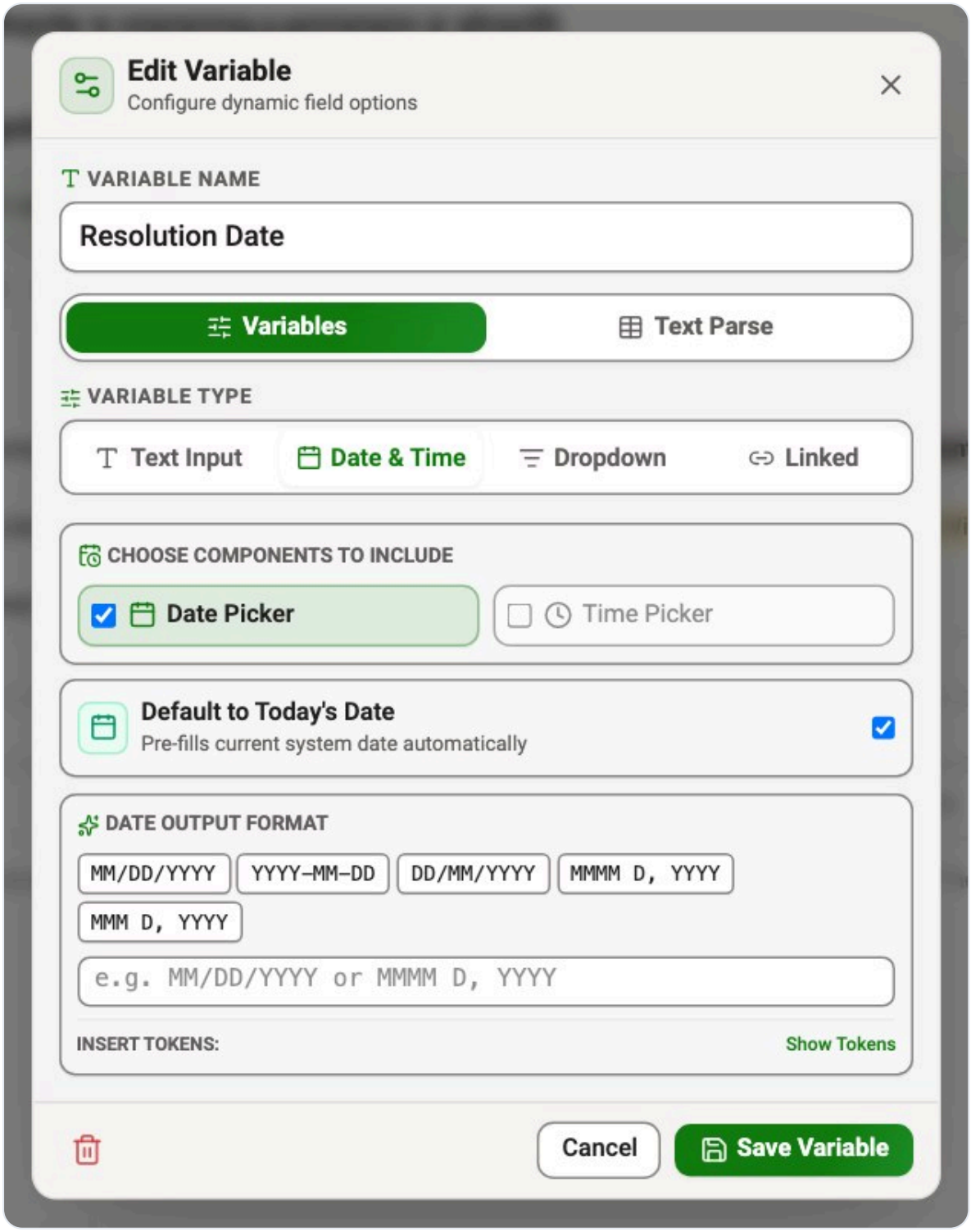
Type 2 · Fixed & Dynamic Lists

Dropdown Variables

Ensures consistent phrasing across your team by providing a pre-approved list of choices (priority levels, resolution codes, refund reasons, escalation tiers).

- ✓ **Searchable Picker:** type in the field to filter a long list, or type a value that isn't on it.

- ✓ **Option presets:** start from Yes/No, Pass/Fail, Priority (High, Medium, Low), or Status (Approved, Pending, Rejected), then add, remove, or rename options.
- ✓ **Filled by auto-fill:** extractor rules can fill a dropdown from pasted text like any other field.

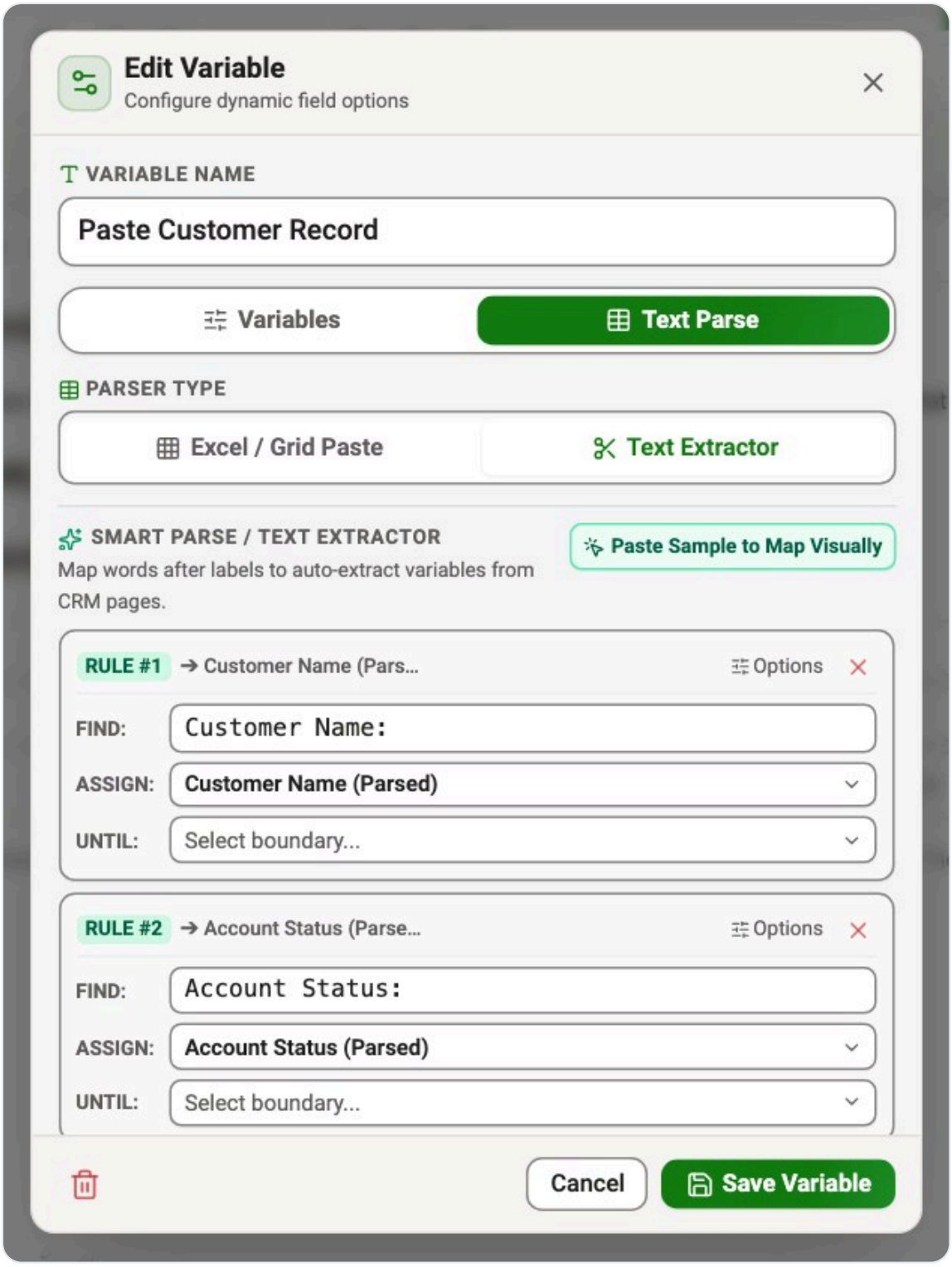


Type 3 · Timestamps & Calendars

Date & Time Variables

Date and time inputs with a calendar and time picker, and a display format you choose. A variable can hold a date, a time, or both.

- ✓ **Default to Today / Now:** Automatically sets today's date or current time on new template loads.
- ✓ **Date formats:** `YYYY-MM-DD`, `MM/DD/YYYY`, `DD/MM/YYYY`, `MMM D, YYYY`, `MMMM D, YYYY`, or type your own pattern.
- ✓ **Time formats:** 24-hour (`14:30`), 12-hour (`02:30 PM`), either with seconds.
- ✓ **Paste a date:** paste a date from another tool and Tempified reads it into the field; you'll see *Could not recognize date* if it can't.

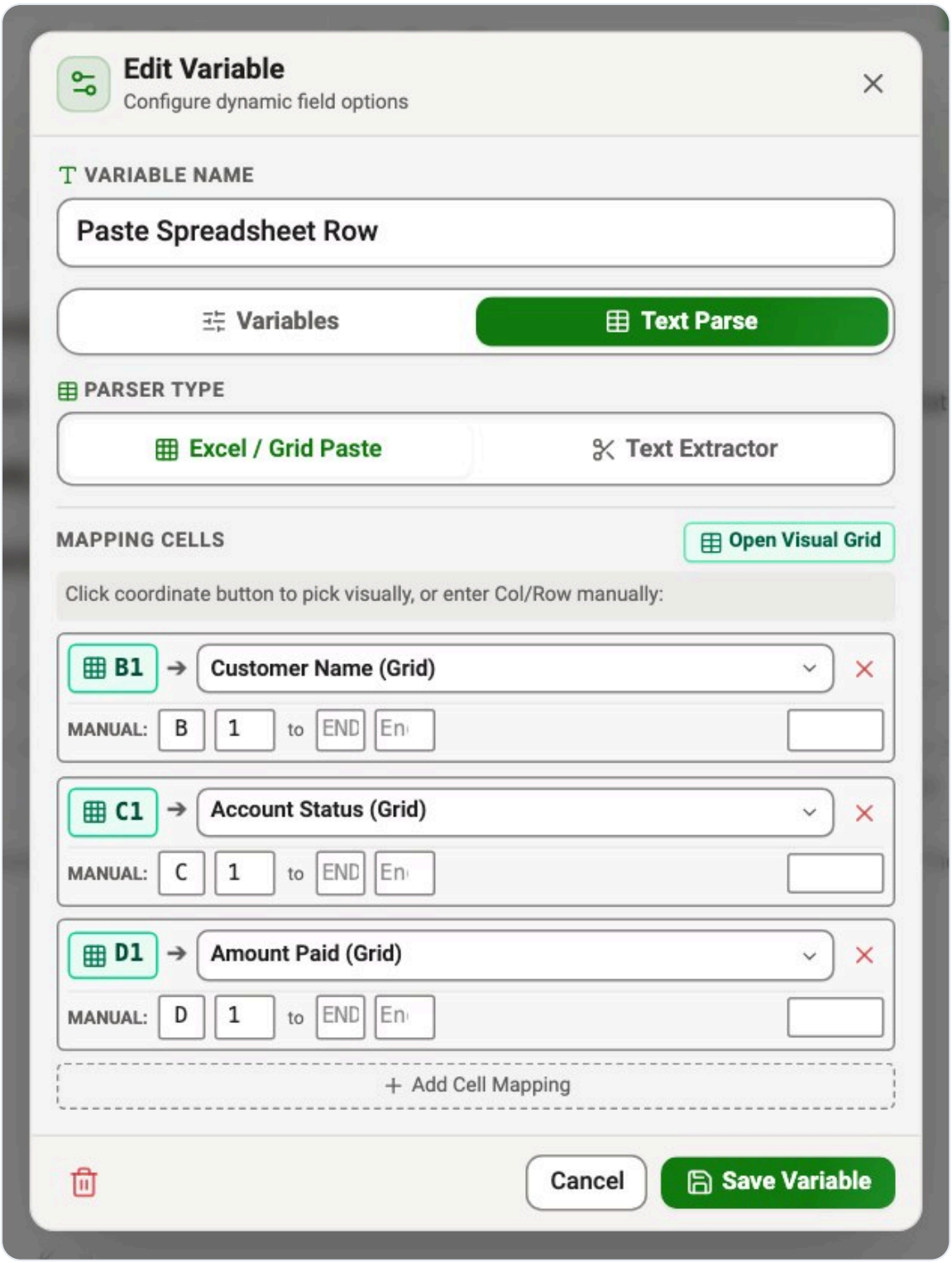


Type 4 · Smart Text Parsing

Text Extractor Variables

A single paste field that automatically finds and extracts multiple fields from freeform text, emails, CRM tickets, and error logs using taught anchor rules.

- ✓ **Multi-Variable Population:** One paste populates customer names, order numbers, amounts, and dates at once.
- ✓ **Start & Stop Rules:** Grab the text right after a label (e.g. `Order ID:`) up to a stopping point — the full rule options are under **Auto-fill from pasted text**.



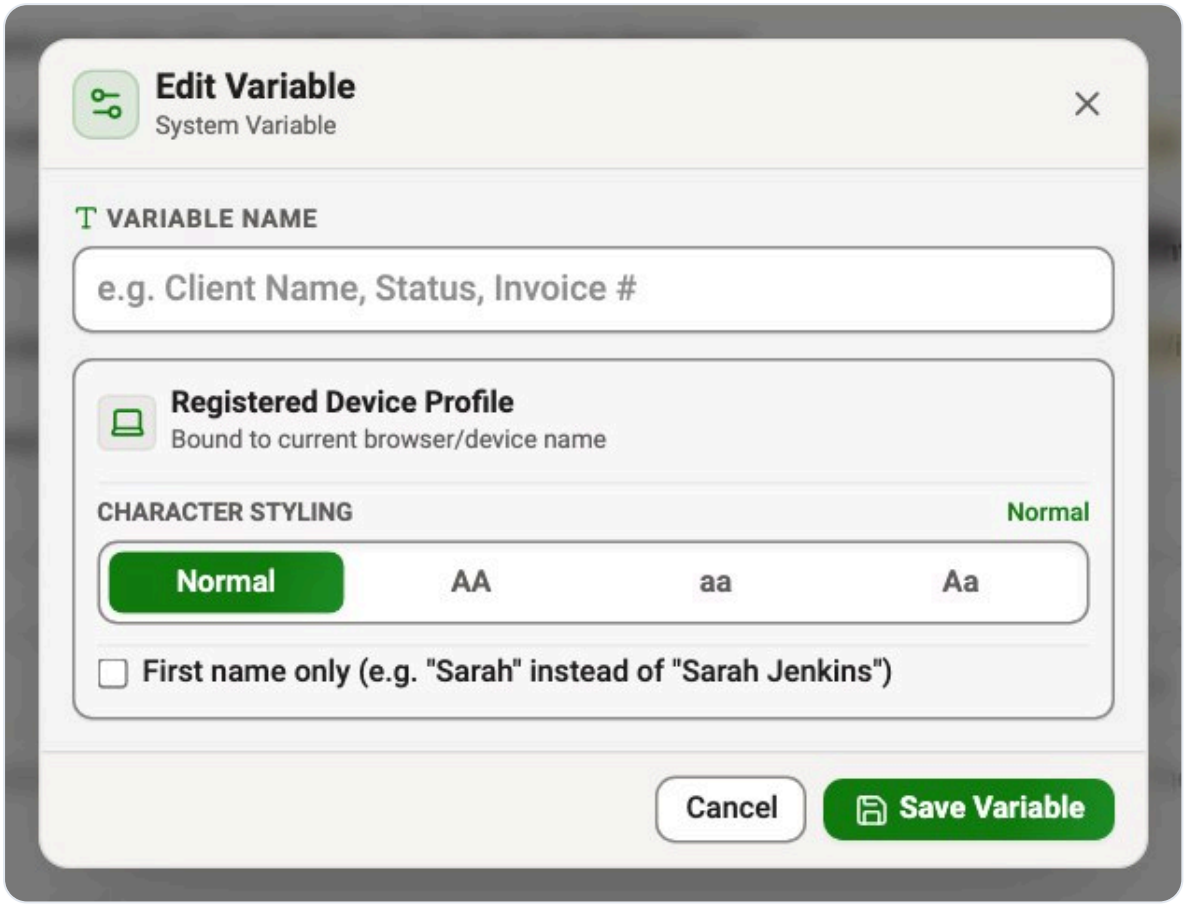
Type 5 · Spreadsheet Tabular Paste

Excel / Grid Variables

Map spreadsheet cell coordinates (e.g. `A1`, `B1`, `C2`) directly to your template fields using a visual grid picker.

- ✓ **Direct Copy-Paste:** Copy any row or table from Excel, Google Sheets, or Airtable and paste directly.
- ✓ **Visual Cell Mapper:** Point and click on spreadsheet cells in the visual preview to link them to variables.

✓ **Cell ranges:** give a start and end row or column to merge several cells into one field, joined by the separator you choose.



Type 6 · Workstation & Team Identity

Device Name Variables

A read-only signature variable that automatically resolves to the authenticated workstation name or agent identity assigned to the device.

✓ **Zero-Typing Signatures:** Team members never have to retype their name or agent ID in closing signatures.

✓ **Workspace governance:** Automatically synced from Tempified Console device approval metadata.

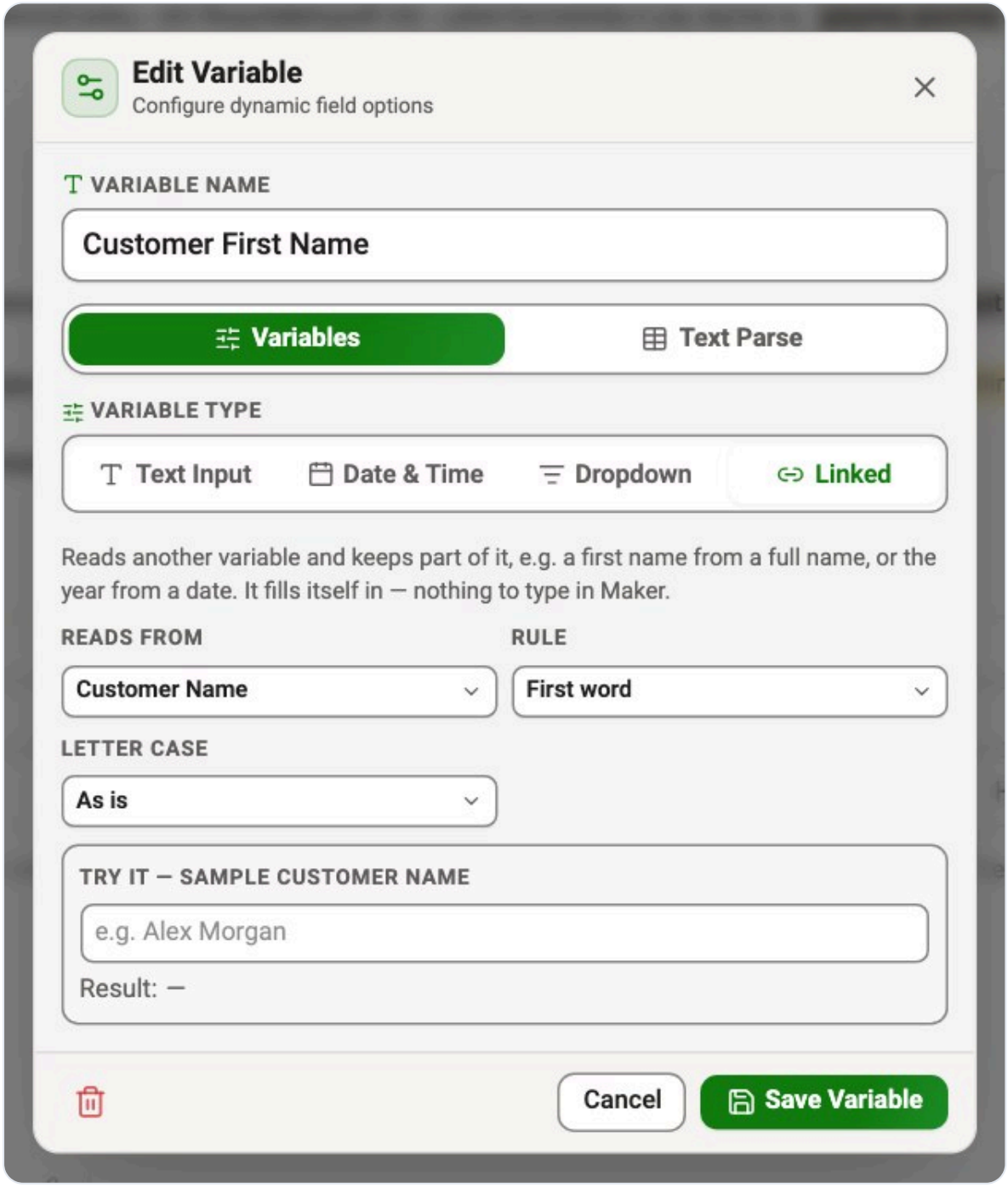
✓ **Shaping the name:** *First name only* turns “Sarah Jenkins” into “Sarah”, and letter case can make it UPPERCASE, lowercase, or Title Case.

Type 7 · Derived Values

Linked Variables

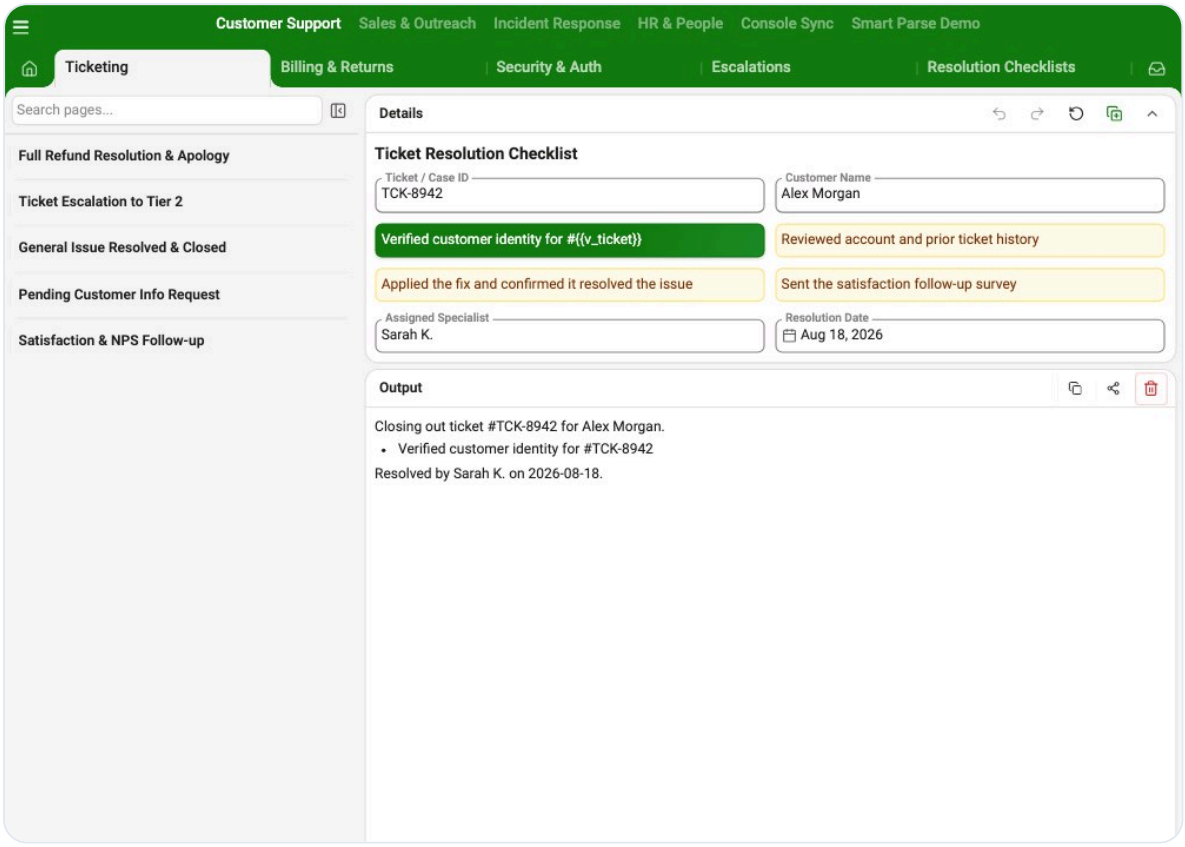
A linked variable has no field of its own. It reads another variable's value and applies a rule to it, so one thing you type can show up in several shapes. Fill in *Customer Name* once, and a linked *First Name* variable greets them by first name.

- ✓ **Word rules:** first word, last word, word number…, first or last characters…, text before or after a marker, initials.
- ✓ **Cleanup rules:** numbers only, letters only, the name or domain part of an email address, or your own custom pattern.
- ✓ **Date rules:** pull the year, month (as a number or name), or day out of a date field.
- ✓ **Formatting:** the result can take the same case and list formatting as a text variable.



Repeatable blocks & optional sentences

For templates that repeat or branch

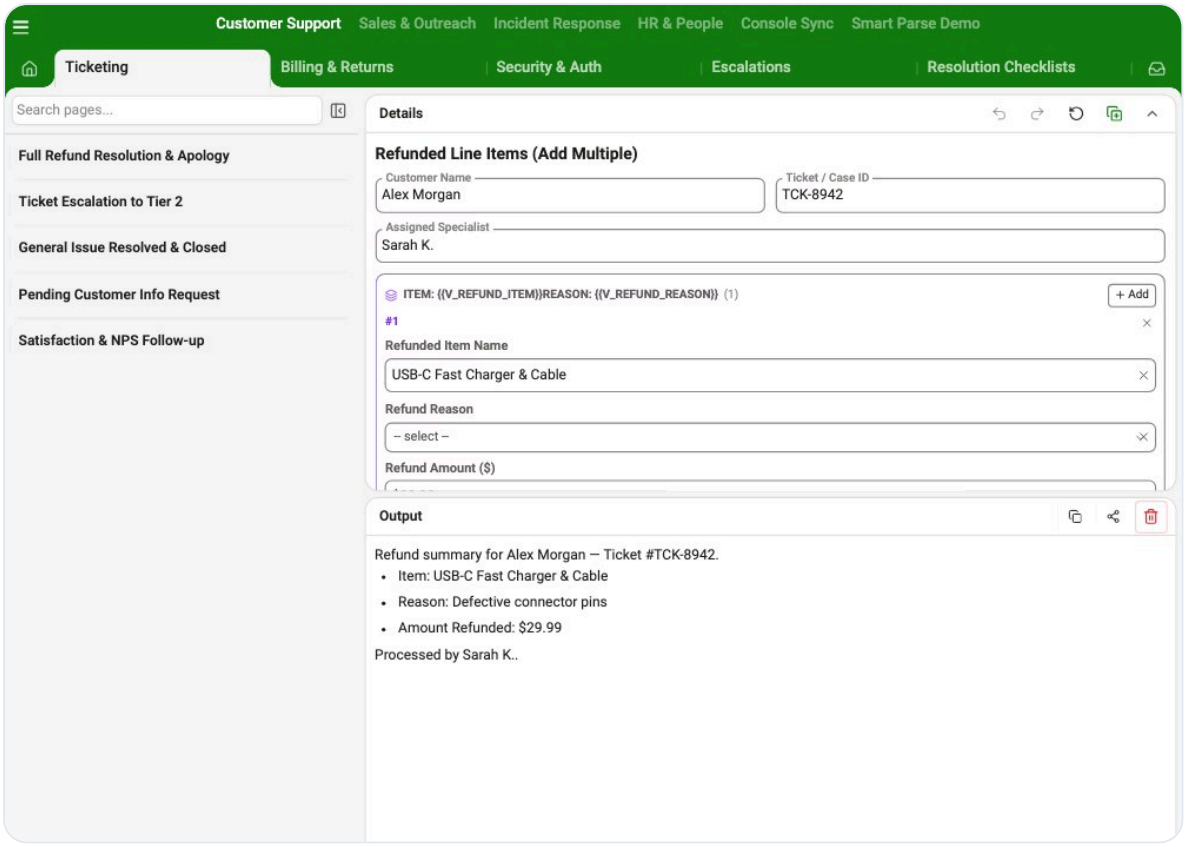


Conditional Output

Optional sentences

In the Builder, highlight a sentence or a bullet and press **Optional**. In the Maker it shows as a checkbox: tick it to include that line in the finished output, untick it to leave it out. The output updates as you click.

- ✓ **Dynamic inclusion:** Unchecked items are stripped cleanly without leaving blank gaps.
- ✓ **List-item support:** Works on standard body text, bullet lists, and numbered action items.



Dynamic Repeater

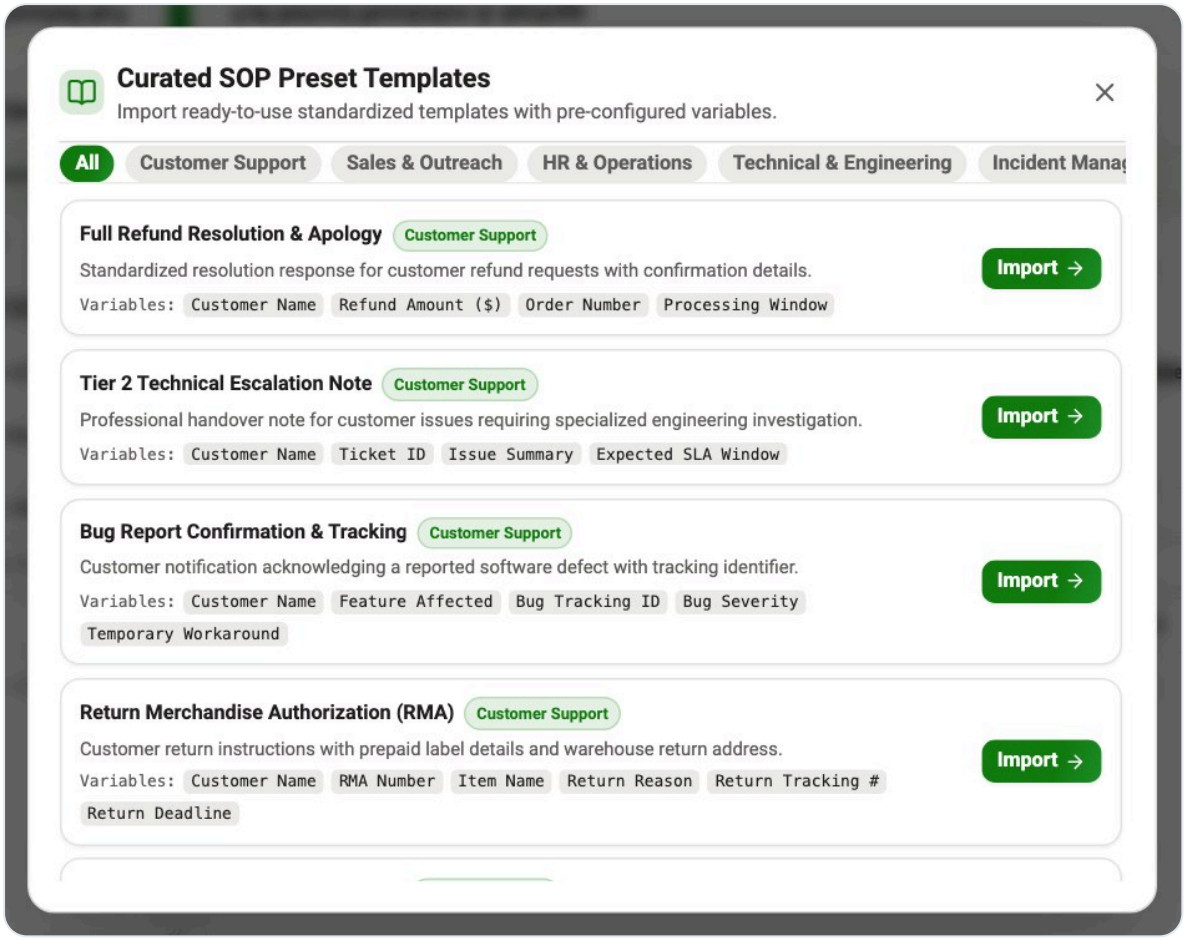
Repeatable blocks

In the Builder, select part of the template (or a bullet) and press **Repeatable**. In the Maker the block gets its own panel with an **Add** button: each click adds a numbered entry (#1, #2…) with its own copy of the fields inside, and the × removes one entry. A block with no entries is left out of the output entirely.

- ✓ **Multi-item entries:** Perfect for order line items, multiple stakeholders, and incident steps.
- ✓ **Independent removal:** Delete individual appended entries without affecting the base template.
- ✓ **Every field type works inside:** dropdowns, dates, auto-fill paste boxes, and grid pastes each fill just that entry.

Organizing your templates

Sets, tabs, sections, and ready-made presets



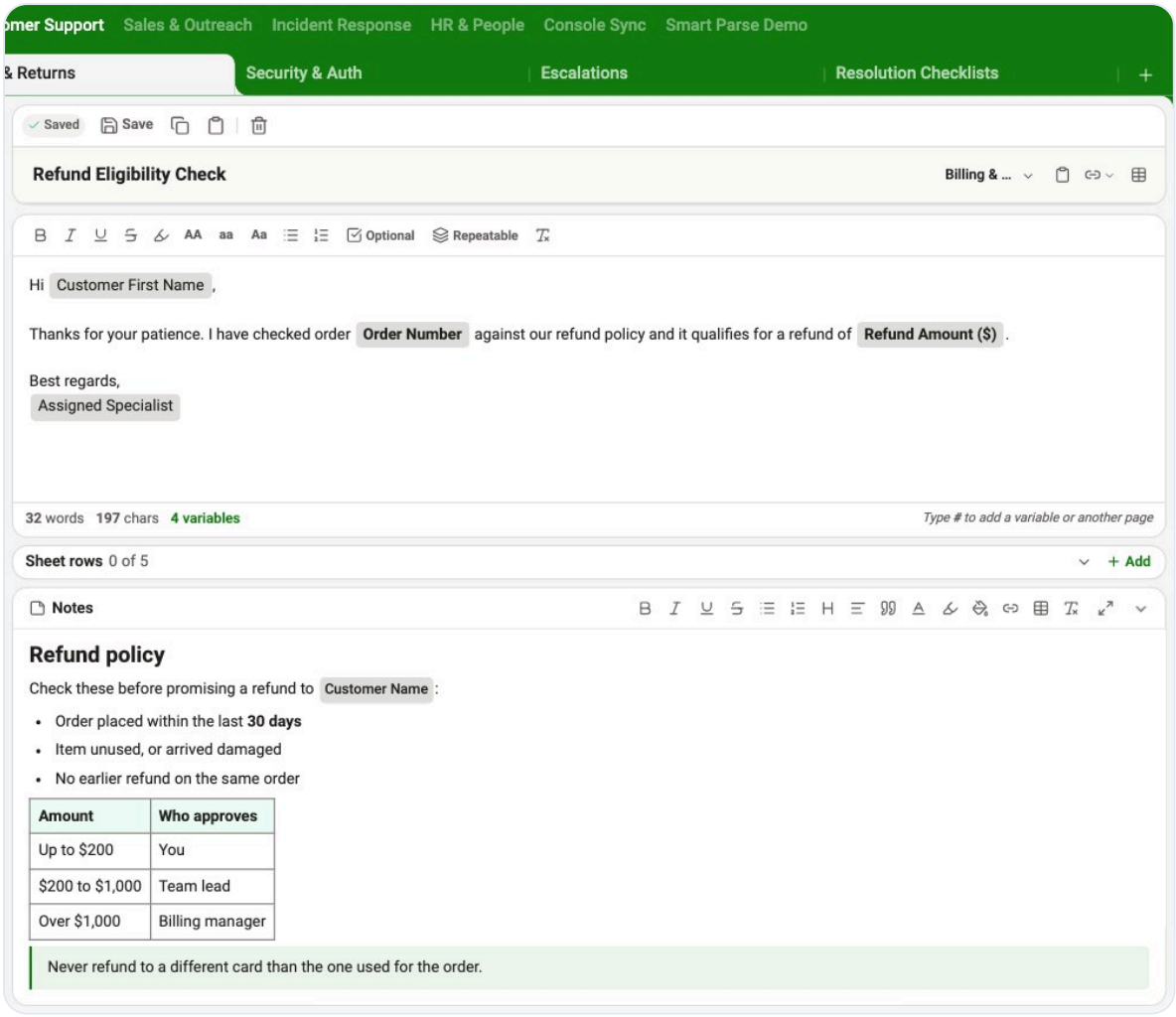
- **Libraries** are independent collections of templates and variables — keep a separate set per client, project, or workflow.
- Create, clone, reorder, and switch libraries from the menu. Double-click the current library's name in the header to rename it. Free and Pro both have unlimited libraries.
- Deleting a library moves it to the **Archive**, where it can be restored for 30 days.
- **Tabs** group a library's templates along the top. In the Builder, add one with **New tab…**, drag tabs to reorder them, and right-click a tab to rename or delete it; a deleted tab's templates move to **General**, which can't be renamed or deleted.
- The **Presets library** ships 17 ready-to-use templates across 5 categories: Customer Support, Sales & Outreach, HR & Operations, Technical & Engineering, and Incident Management.
- Each preset imports in one click, complete with its own pre-built fields and variables.
- A good starting point for a brand-new library, or for ideas on how to structure your own workspace.

- **Sections** group templates inside a tab; add, rename, and drag them in the Builder's Pages panel.
- **Export** a library (or all libraries, one file each) to a portable JSON file; **Import** one or several files back in at any time.
- Category tabs and full-text search keep a large library easy to navigate.

Page notes

Reference notes that sit beside a template

Every template can carry notes — the how-to, policy, or reference material that goes with it. You write them once in the Builder, and whoever fills the template in the Maker reads them right next to the form, without switching to another document.



Writing notes (Builder)

Open the **Notes** bar in the Builder and expand it to take the whole editor area (it does this on its own when you open a saved page whose template body is empty; a new page starts at half). You get headings and subheadings, bold, italic, underline, and strikethrough, text and highlight colors, line backgrounds, quotes, bulleted and numbered lists, alignment, and links. Paste a screenshot straight in; pictures belong in notes, not the template body.

Tables

Insert a table and add or delete rows and columns, color cells and their borders, and drag a column edge to resize it (double-click to fit). A note can be just a table or a picture.

Variables in notes

Click a variable in the list to insert it at the cursor, with your library's recently used variables at the top. In the Maker it fills with whatever has been typed into that field.

Reading notes (Maker)

Notes show read-only beside the form. Collapse or resize the panel when you need the room, and use the search box with next/previous match to find a line. Hovering another template in the list previews its notes too.

- **Read and understood (Team Console):** in the Notes header, tick **I have fully read and understand this topic**. If the note is edited later, it asks again, this time for *the updated topic*.
- **Updated notes are flagged (Team Console):** a small amber dot next to a template in the list means its notes changed since you last read them.
- **Notes-only pages:** leave the template body empty and the page becomes a reference page; its notes take the main area in the Maker.
- **Searchable:** Maker search looks inside notes (narrow it with **In notes**), and so does the search box on Home.

On Team Console, admins can see who has acknowledged each note in the Notes acknowledgements report.

Sheet rows

Output that pastes into separate spreadsheet cells

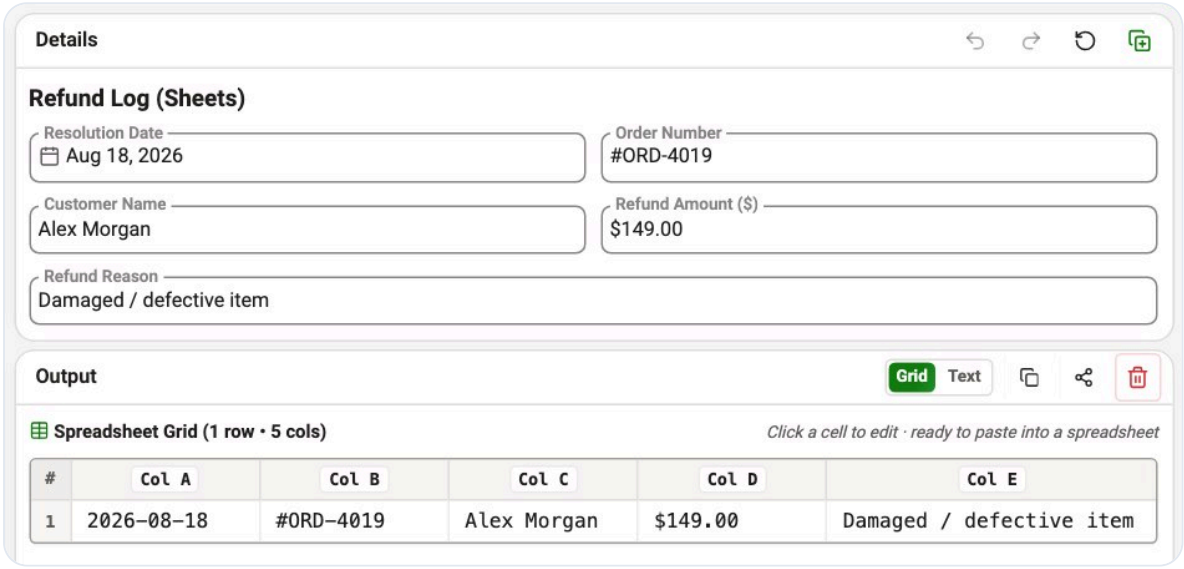
Some output belongs in a spreadsheet, not a message: a log line, a tracker row, a shipment record. Sheet output separates the values so one paste into Excel or Google Sheets fills a cell for each. There are two ways to set it up in the Builder, both on Pro.

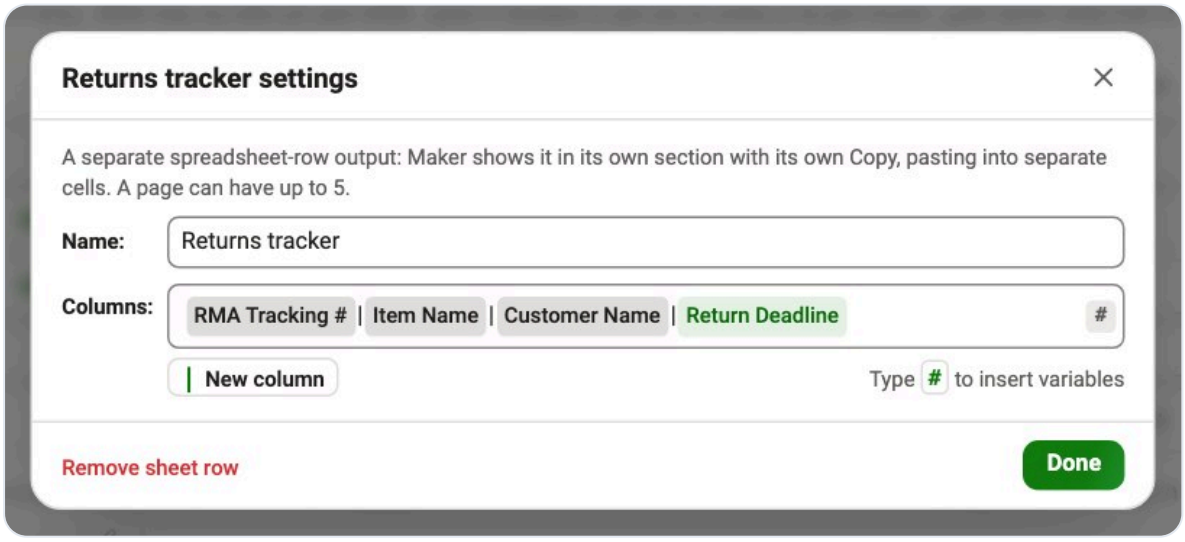
Sheets: the whole template is a row

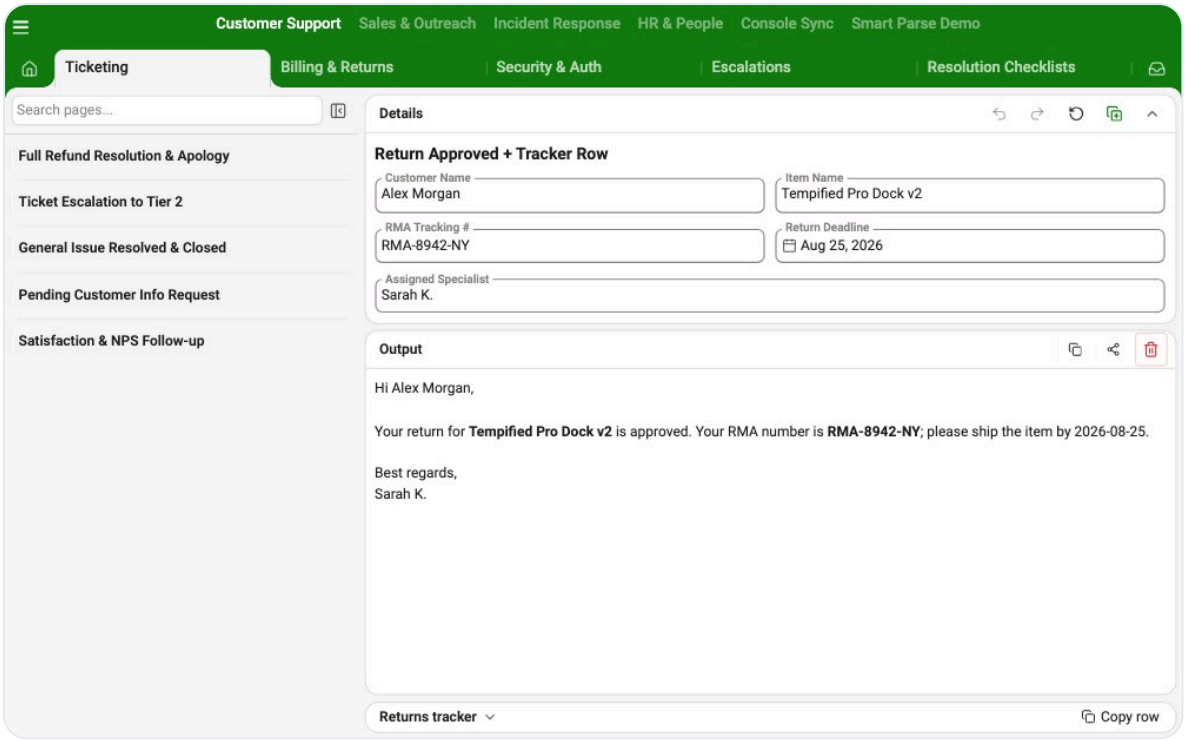
Turn on **Sheets** in the Builder toolbar and the template itself becomes a spreadsheet row. Separate the columns with the separator you choose (| by default); a live column ruler above the editor shows which column you're typing in.

Sheet row: a row next to your text

Keep the normal message and add a **Sheet row** alongside it, up to five per page (one for each sheet you log to). In each row's settings, name the row and add its columns (each can hold text and variables); the page's separator splits them. The Builder lists the rows in a **Sheet rows** box under the editor, and the Maker shows them in their own box under the output, each collapsed until opened, with its own **Copy row**.







- **In the Maker, Sheets templates** get a **Grid / Text** toggle that previews the row as a real table, and you can edit any cell right in the grid. The fields move to the top of the Output box, side by side, with the preview right below; the separate Details column only shows up if the page has notes.
- **A sheet row** appears in its own section under the output, under the name you gave it, with its own **Copy row** button.
- **Values stay in their cells:** a sheet row is split into columns before variables are filled, so a value that happens to contain the separator doesn't spill into the next cell.
- **Pasting** into Excel or Google Sheets puts each value in its own cell, in order.

Works offline

Install it, use it without a connection

Tempified is built from the ground up to run on your own device and work offline. Unlike traditional cloud apps that freeze or fail when your internet drops, Tempified fills templates, parses pasted text, and saves your work directly in your browser — keeping your workflow 100% functional on airplanes, remote job sites, or during unexpected internet outages.

1. Saved Right in Your Browser

Your templates, variables, preset libraries, and form entries are stored on your own device, in your browser's built-in storage. Every edit is saved instantly, with **no waiting on a remote database**.

2. Instant Launch, Every Time

After your first visit, the whole app — screens, fonts, icons, and features — is kept on your device. It opens instantly with no network delay, even with your Wi-Fi completely turned off.

3. Standalone Desktop & Mobile App

Install Tempified straight from Chrome, Edge, Safari, or Brave as a standalone desktop window on macOS, Windows, and Linux — complete with native dock/taskbar shortcuts and distraction-free framing.

4. On-Device Processing

Text parsing and template filling run entirely on your device, so confidential customer records, patient data, billing details, and internal notes are never sent anywhere to be processed. On the Free plan your templates and the data you paste never leave your browser; Pro cloud backup can be turned on and end-to-end encrypted, so we only ever store a scrambled copy we can't read.

How to Install Tempified for Offline Use

Installable App

Chrome & Brave
Click the **Install Tempified** icon in the address bar (or Menu → *Install Tempified*).

Microsoft Edge
Click the **App available** icon in the URL bar → click **Install**.

Safari (macOS & iOS)
Click **Share** → select **Add to Dock** (macOS Sonoma+) or **Add to Home Screen** (iOS).

What works while offline?

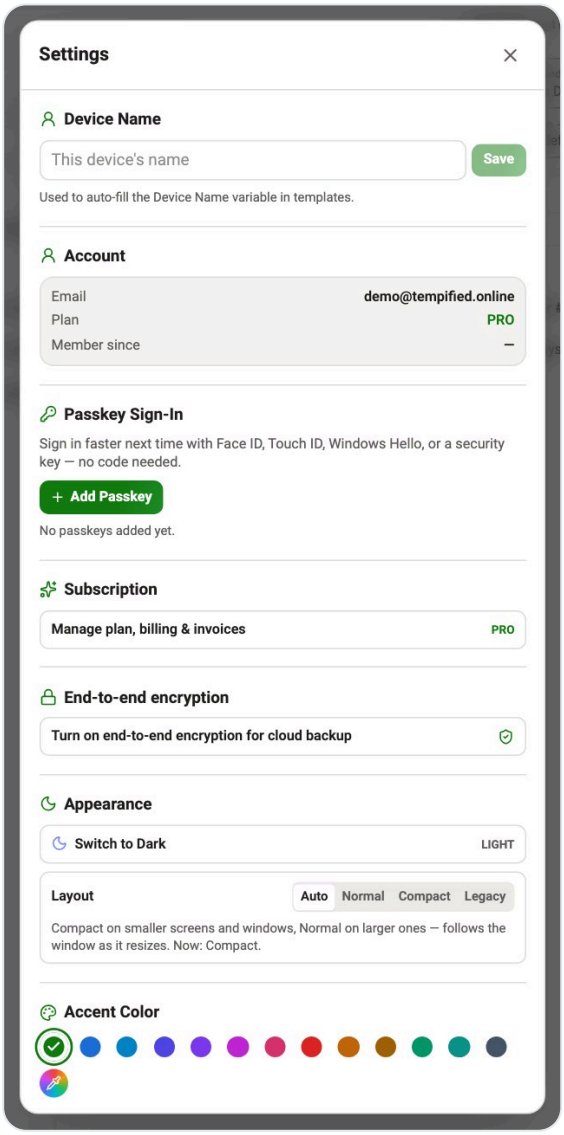
- **Full Maker & Builder:** Create, edit, clone, delete, and organize all templates and variables.
- **Auto-Fill & Text Parsing:** Paste Excel rows and customer data — extractors run 100% on your device.
- **Export & Import:** Download a complete workspace backup file, or load template files, offline.
- **History & Undo/Redo:** Step back and forward through every change to your entries and results.

- **Repeatable blocks & optional sentences:** Add/remove repeated sections and toggle interactive sentences freely.
- **Auto Team Re-sync:** Team computers automatically reconnect and pick up shared updates when the internet returns.

Settings & appearance

Device name, wallpaper, theme, widgets, and billing

Settings holds everything about how Tempified looks and identifies this device — open it from the gear icon at the bottom of the menu (tap the hamburger icon, top left). A light/dark toggle sits right beside it, for a one-tap switch without opening Settings at all.



Device Name

Names this workstation. It auto-fills the Device Name field in templates that use one, and on Team Console it's the name your admin sees in the device list — renaming here updates that record too.

Account

Your email, plan, and how long you've been a member — a quick at-a-glance summary of who's signed in on this device.

Passkey Sign-In

Add this device's Face ID, Touch ID, Windows Hello, or a security key as a passkey, so signing back in next time is a tap instead of typing a code.

Subscription & Billing (Pro)

Shows your current plan, price, and renewal date, plus every feature your Pro account unlocks. Manage your payment method and invoices, or cancel/reactivate auto-renew, all from the same panel. If a renewal payment fails, you keep Pro while the payment is retried. A banner under the header asks you to **Update payment**; Pro ends only if every retry fails.

End-to-end encryption (Pro)

One tap to lock your cloud backup to a key only you hold. Full walkthrough in End-to-end encryption below.

Appearance (light / dark)

Switch themes from Settings, or with the sun/moon icon in the menu bar. The choice is saved to this device and applies everywhere — Home, Maker, and Builder.

Maker layout

Auto (recommended) picks Compact on smaller windows and Normal on larger ones, switching as you resize. **Normal** puts the template list on the left and Output on the right, with Details above Output (or beside the list when the page has notes). **Compact** is Normal with tighter spacing, and it's also what phones use. **Legacy** is the original three columns side by side, and isn't optimized for newer features or small screens.

Wallpaper, blur & tint

In **Appearance → Wallpaper**, choose a JPG, PNG, or WebP up to 10 MB. A taller preview shows sample text and a miniature app layout. Adjust **Wallpaper blur** (0–24px) and **Wallpaper tint** (0–100%) with a live preview. The tint is white in light mode and black in dark mode; the colored header stays visible, with wallpaper behind the active tab. Images are resized to a maximum of 1920px and compressed before saving. The image and preferences stay in this browser for the current account or workspace, work offline, and do not sync to other devices. Image and save errors appear here in Settings. Use the trash icon to remove the wallpaper.

Accent color

Pick from built-in presets, or open the custom color picker to choose any hex value — buttons, the header, and highlights update live while you drag. Save as many custom colors as you like and switch between them. They're saved on this device, and on Pro they follow your account too.

Share Link Branding (Pro)

Put your own logo (an `https://` image link) and brand color (a hex value like `#059669`) on every public fill-in form you share. Click **Save** to apply it to all your share links at once; leave both blank to use the default look.

Widgets (Pro)

Your widgets are listed here, each with a switch to show or hide it, and **Manage widgets** opens the editor to create or change one. Full guide in Your own widgets below.

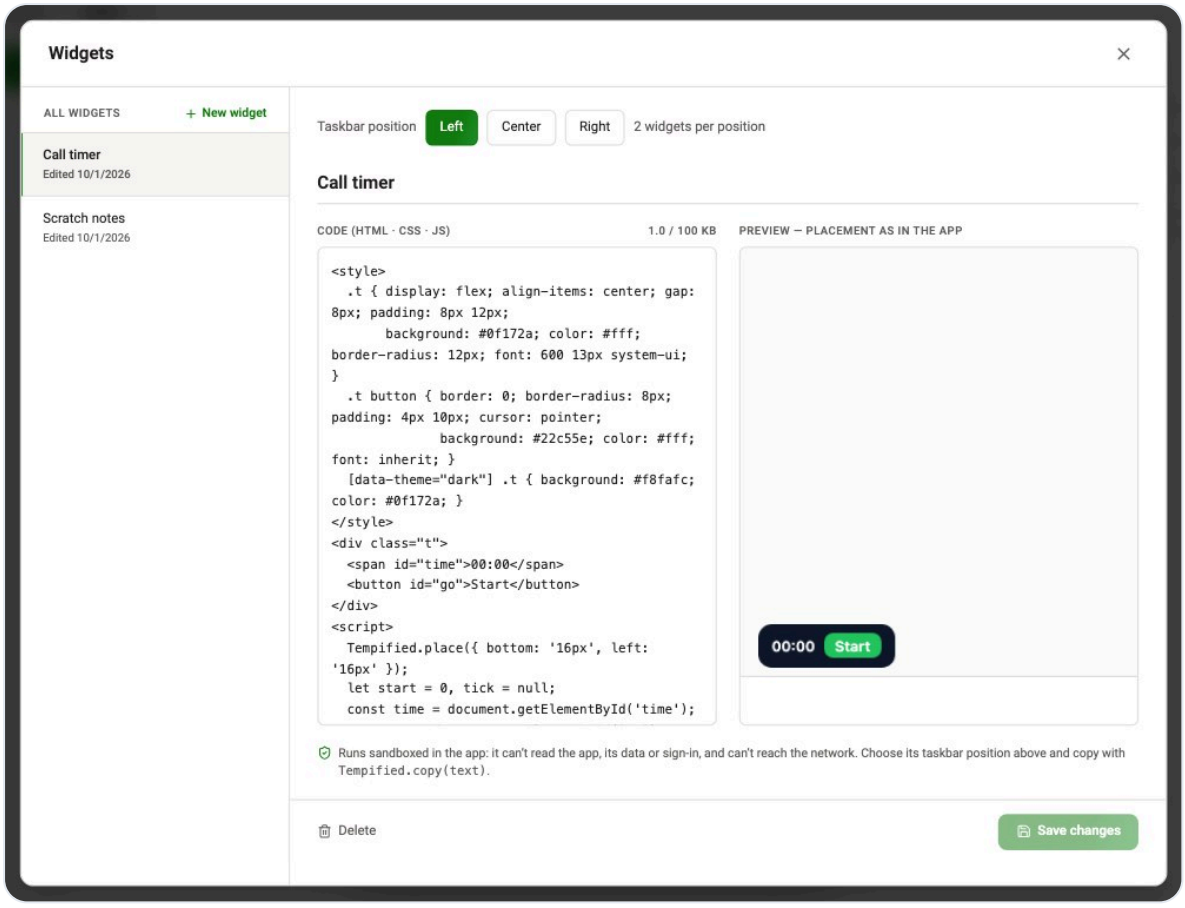
API Access (Pro)

Fill your templates from your own scripts. **Generate key** creates a personal API key — copy it right away, because it's only shown once — then call `POST /api/tools/fill` with `Authorization: Bearer <key>`. You can revoke the key at any time. Not available while end-to-end encryption is on, since the server can't read your templates to fill them.

Your own widgets

Small tools in the widget taskbar (Pro)

Widgets are small tools you write yourself — a call timer, a scratch pad, a click-to-copy phone number, a button that opens a web tool in a panel — available from the compact taskbar at the bottom of the app. Each is a snippet of HTML, CSS, and JavaScript, edited next to a live preview placed exactly as it will appear in the app. Widgets are part of Pro; on Team Console, your admin adds them for you instead (see the Team Console guide).



1 **Open the editor**

In **Settings**, scroll to **Widgets** and choose *Manage widgets*.

2 **Write it**

Choose *New widget*, give it a name, and write the code. The preview updates as you type and shows where it will sit in the taskbar: **Left**, **Center**, or **Right**. Each position holds at most two enabled widgets. The editor and Store check available space before adding one.

3 **Save it**

Create widget saves it to your account, and it appears in the app straight away — on every device you're signed in on. Close the editor with unsaved changes and it asks before throwing them away.

4 **Show or hide it**

Back in Settings, each widget has its own switch. Switching one off hides it everywhere without deleting it; switch it back on whenever you need it.

What a widget can call

CALL	WHAT IT DOES
`Tempified.place({ bottom, right, … })`	Legacy placement hint. The app manages taskbar alignment and keeps open windows within the screen edges.
`Tempified.copy(text)`	Copies text to your clipboard.
`Tempified.paste()`	Returns the clipboard text, so a widget can work with what you copied (empty if the browser refuses).
`Tempified.openPanel({ url, width, height, place })`	Opens a floating panel showing an HTTPS page in its own frame. The page can resize the panel to fit its content.
`Tempified.closePanel()`	Closes the panel. It stays loaded, so reopening is instant.
`Tempified.theme`	The app's current theme, `'light'` or `'dark'`.

A starter widget

A click-to-copy phone number in the bottom-left corner — paste it into a new widget and change the number to try it.

```
<button id="copy" style="padding:8px 12px;border:0;border-radius:10px;
  background:#059669;color:#fff;font:600 13px system-ui;cursor:pointer">
  Support line: 555-0100
</button>
<script>
  Tempified.place({ bottom: '16px', left: '16px' });
  document.getElementById('copy').onclick = () ⇒ Tempified.copy('555-0100');
</script>
```

Locked down by design

Widgets run in a sandbox with no internet access and no way into the app, your templates, or your sign-in — they only work with what you type into them. Panels load their page separately, never from Tempified itself. Add `[data-theme="dark"]` rules to your CSS and a widget follows the app's theme live.

Good to know

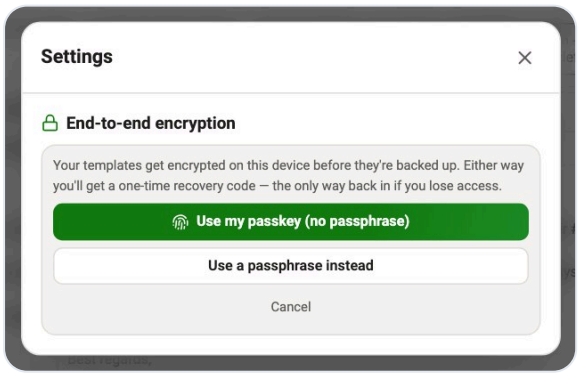
Save up to 20 widgets, each up to 100 KB of code. At most six can be enabled at once: two at each taskbar position. Open a widget from its circular icon and drag its window by the header; the icon stays in place, and your input is preserved when you close and reopen it. Widgets hide in Builder so they don't get in the way of editing.

End-to-end encryption

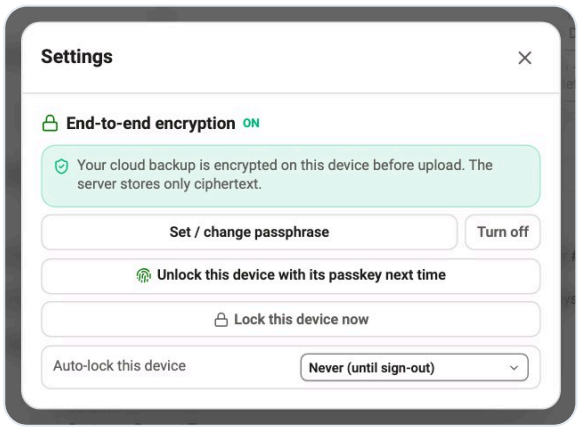
Lock your cloud backup to a key only you hold

On the **Pro** plan, your templates sync to the cloud so they follow you between devices. By default that copy is encrypted while it travels and while it's stored, but Tempified can still read it. Turn on **end-to-end encryption** and that changes: your templates are scrambled *on your device* before they leave it, and we only ever store a scrambled copy we can't open.

BEFORE — CHOOSING A METHOD



AFTER — TURNED ON



1 **Open Settings → End-to-end encryption**
It sits between Subscription and Appearance. Available on any active Pro account.

2 **Pick how you'll unlock it**
Use your passkey — Face ID, Touch ID, Windows Hello or a security key. Unlocking is a biometric tap, no passphrase to remember. Or choose a **passphrase** instead.

3 **Save your recovery code**
A one-time code is shown once. It is the only way back in if you lose your passkey or forget your passphrase — store it somewhere safe. We cannot show it again or reset it for you.

4 **That's it**
From that point on, everything synced is scrambled. Add more devices by setting up each one's passkey, or by entering your passphrase or recovery code there once.

Good to know

- **We hold no keys.** The passphrase and passkey secret never reach our servers. If you lose every unlock method *and* the recovery code, the cloud copy can't be recovered — that is the whole point: only you can open it.
- **Our support team can't read your templates.** They can still help with billing and account questions, but they have no way to open your encrypted workspace.
- **Local templates stay usable.** Encryption applies to the cloud backup. On a device you're signed in to, unlock once and it stays unlocked until you sign out. To lock it sooner, set **Auto-lock this device** to after 1, 8, or 24 hours idle.
- **Change your passphrase any time** with **Set / change passphrase** in the same panel; while it's locked, the section shows **Locked** until you unlock it.
- **You can turn it back off.** Disabling re-uploads a readable copy so the account keeps working on devices that never held the key.
- **Team Console is different.** A Console workspace is managed by your own team and is readable by that workspace by design, so it is not end-to-end encrypted.

Full details on how your data stays private are on the **Privacy & Security** page.

Plans & pricing

Starter, Pro, and Team compared

Choose the individual plan that fits your personal workflow — from a 100% free, on-device standalone tool to power-user Excel extraction and multi-device cloud backup. *(For multi-user team workspaces, see the Team Console documentation.)*

STARTER FREE

100% On-Device

Free Forever

$0 / forever · no credit card required

Ideal for individual test drives, quick daily snippets, customer replies, and 100% on-device private local use.

- **Unlimited** local templates, variables and libraries
- **Excel grid & smart text extractors**, Bulk run and sheet rows
- Maker undo / redo and your own accent color
- Standard Text, Date, Dropdowns & Dynamic Checklists
- Runs 100% on your device and works offline (no cloud required)
- 1-Click Copy with clean formatting output
- Standard JSON file backup import and export

Open Free App →

★ BEST VALUE · SAVE 16% ON ANNUAL

PRO PLAN

Single User Powerhouse

Pro Membership

ANNUAL (BEST VALUE)	MONTHLY (FLEXIBLE)
$1.67 / mo	**$1.99** / mo
$19.99/yr · 2 Mo Free	Cancel anytime

Built for professional Virtual Assistants, customer support agents, and freelancers who need Excel paste & continuous multi-device sync.

- **Everything in Starter** included
- **Cloud Backup & Multi-Device Sync** — with optional end-to-end encryption

- **Version history** — restore any of your last 30 saves
- **Your Own Widgets** — small tools that float in the app
- **Share Links & Responses** — send a fill-only form, collect the answers
- **API access & share-link branding** for scripted workflows
- **2 Device Slots** with instant self-service swapping

Get Pro Annual ($1.67/mo) | Get Pro Monthly ($1.99/mo)

Feature Comparison: Starter vs Pro

FEATURE / CAPABILITY	STARTER (FREE)	PRO PLAN
Custom Template Limit	**Unlimited (Local)**	**Unlimited + Cloud Sync**
Dynamic Variable Fields	**Unlimited**	**Unlimited**
Libraries & 17 Presets	Unlimited local libraries	**Unlimited Sets + Cloud Sync**
Excel / Spreadsheet Grid Extractor	Included	**Included**
Smart Text & Label Extractor	Included	**Included**
Multi-Device Encrypted Cloud Sync	On your device only	**Encrypted Cloud Sync**
Undo/Redo History	50 Maker entries	**50 Maker entries**
Share Links & Responses	—	**Included**
Device Licensing	1 Device (Local)	2 Devices (Self-Service Swap)

Managing a team?

On the Team Console plan, your members use this same app — but they sign in through a join link instead of creating their own account, and their libraries are pushed to them centrally. The **Team Console documentation** covers the member sign-in flow (device approval or email code) and Tempified Console for managing seats, devices, permissions, and shared templates.

FOR TEAM MEMBERS

How to join & use the app →

Join link, workstation name or email code, shared sets

FOR WORKSPACE ADMINS

Tempified Console →

Devices, seats & billing, permissions, template distribution