SOUC 2018

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SedonaOne eForms

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PERENNIAL SOFTWARE

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Table of Contents

eForms Overview

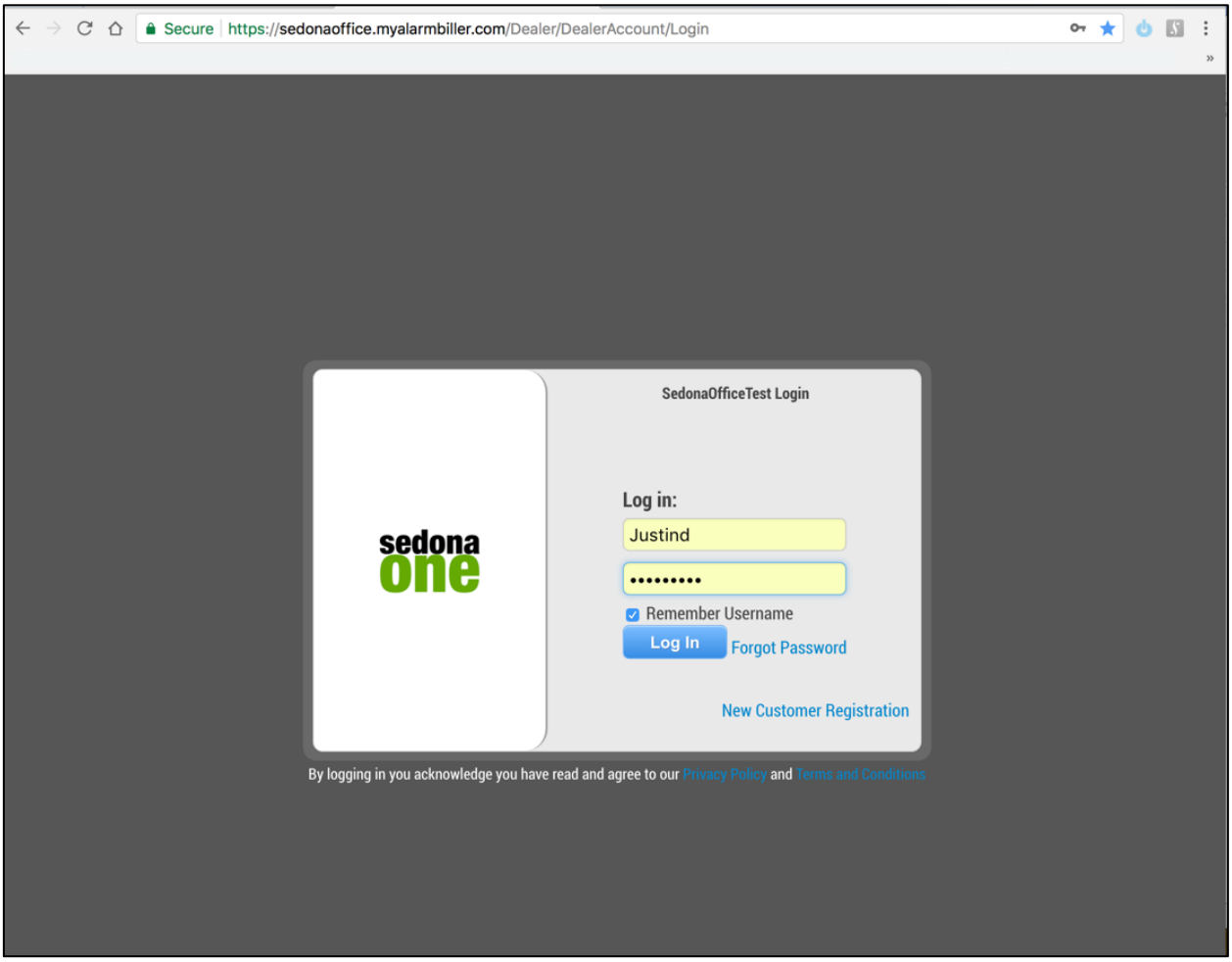
eForms application provides you with a user-friendly interface for the creation and delivery of e-documents and capturing of e-signatures. Access anytime, anywhere on any device using the cloud based application to replace all manual paper processes. eForms helps your business go digital at a time when paper is turning into a thing of the past.

This user guide provides information on all aspects of the eForms web application from logging in for the first time, create a template and delivering eForms.

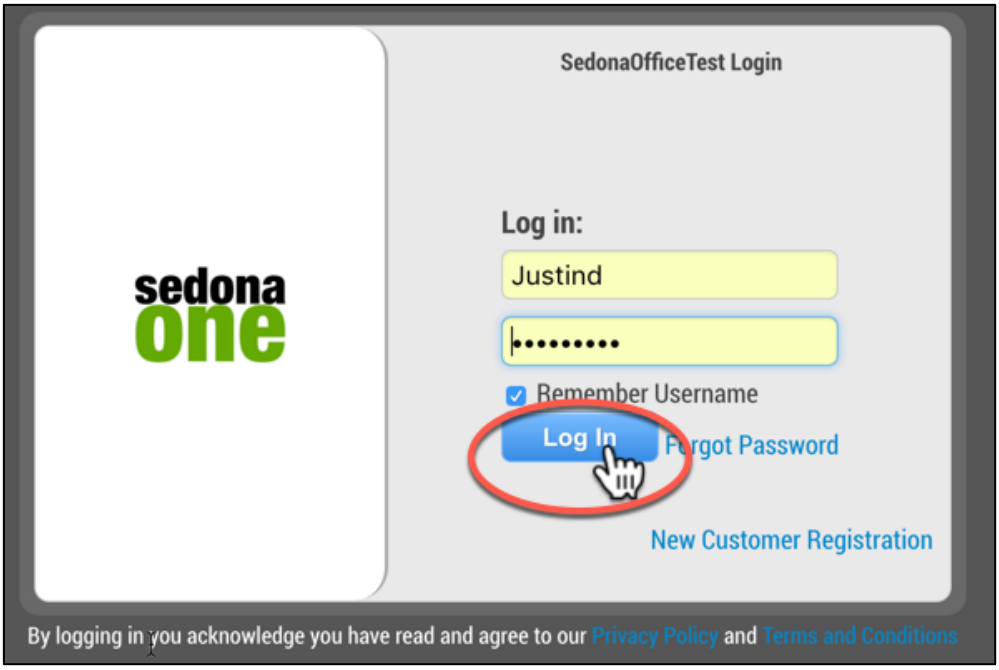
Launching eForms

When first launching eForms you will receive credentials for your company from the SedonaOne staff. You will receive a custom URL, username and default login. Below is the 3-step process to login successfully:

1. Open your internet browser and go to the custom URL provided by the SedonaOne staff. An example of the URL is **https://yourcompanyhere.sedonaone.com**. If you need access for your company please email **support@sedonaone.com**.
   The eForms Login page will look as below:



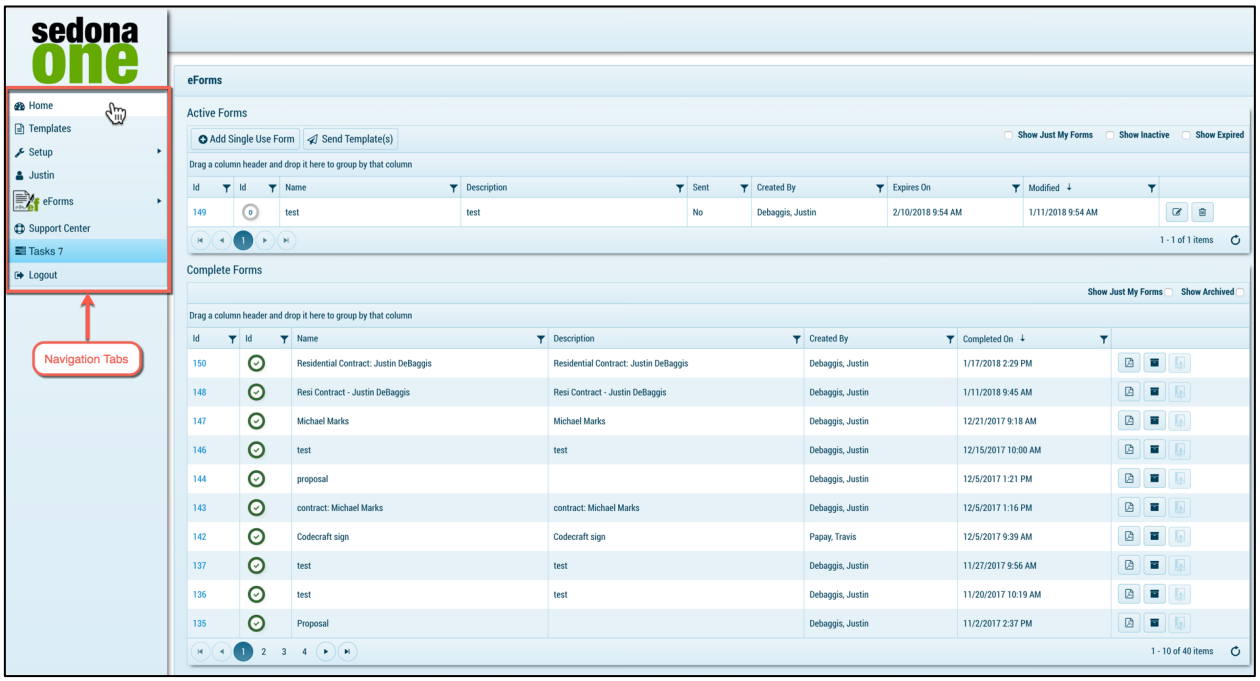
2. Type your username and password and click login. The username and password is first generated by the SedonaOne staff. If you have not received your credentials please email **support@sedonaone.com**.



3. When logging in for the first time you will need to reset your password. After the password is reset, re-enter your username and new password. Watch this video on logging into SedonaOne SedonaOne Login Process.

eForms Components

When you first log into eForms you are taken to the **Home** tab. This tab is the default when logging into the application. The **Home** tab gives you a quick glance of your signed and active forms.



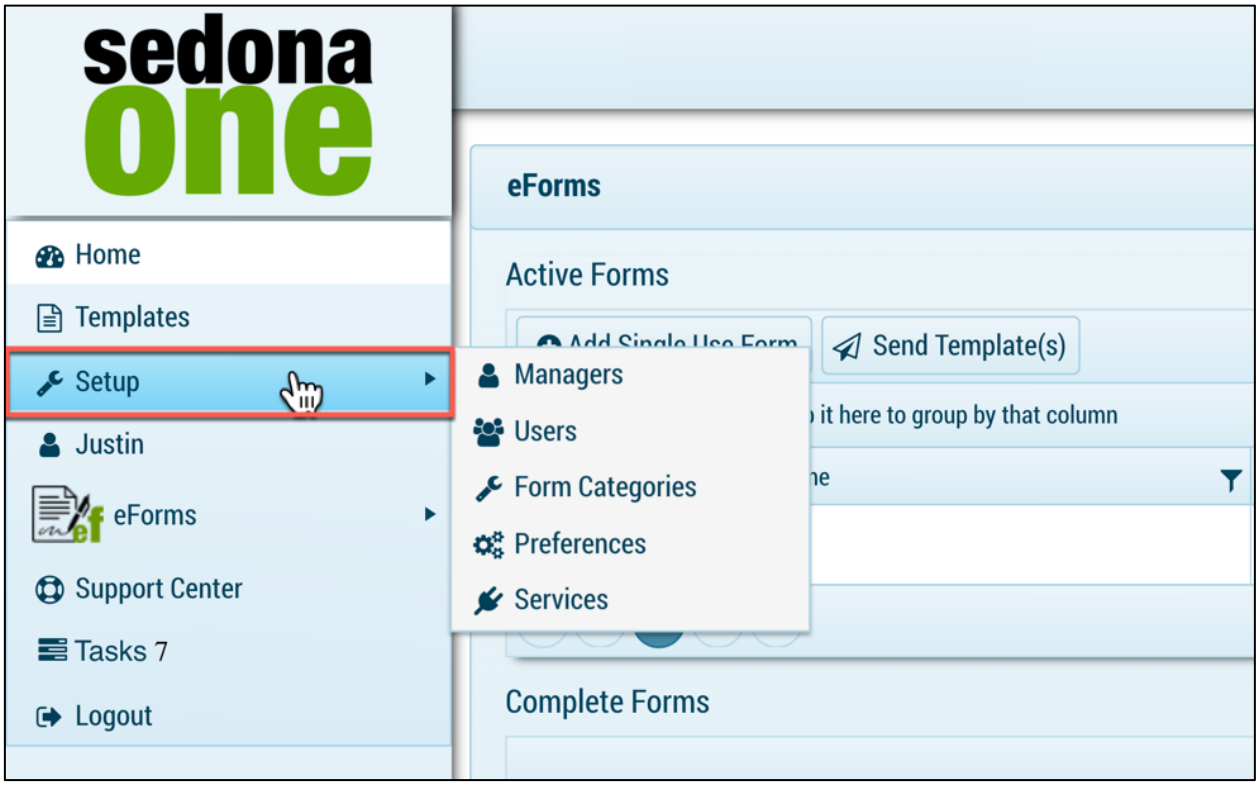
Navigation Tabs

These tabs are used to access different functions in eForms.
The Navigation Tabs are:

- **Home:** This tab provides access to **Active**, **Complete Forms**, the ability to send templates and single use forms.
- **Templates:** This tab provides access to your configured templates. Depending on your account access you may add, adjust or delete templates.
- **Setup:** This is the setup for your company and has specific customization for processes and drop-down fields.
- **User Name:** This tab provides access to your user account information such as site theme, email, etc.
- **Support Center:** This tab provides access to help guides and submitting a support ticket to the SedonaOne support team. Use this tab for any support requests.
- **Logout:** This tab allows you to log out of the application.

Setup

The setup tab allows you to customize the settings for users, customize drop-down fields and manage basic company information. The tabs provided in setup are listed below.



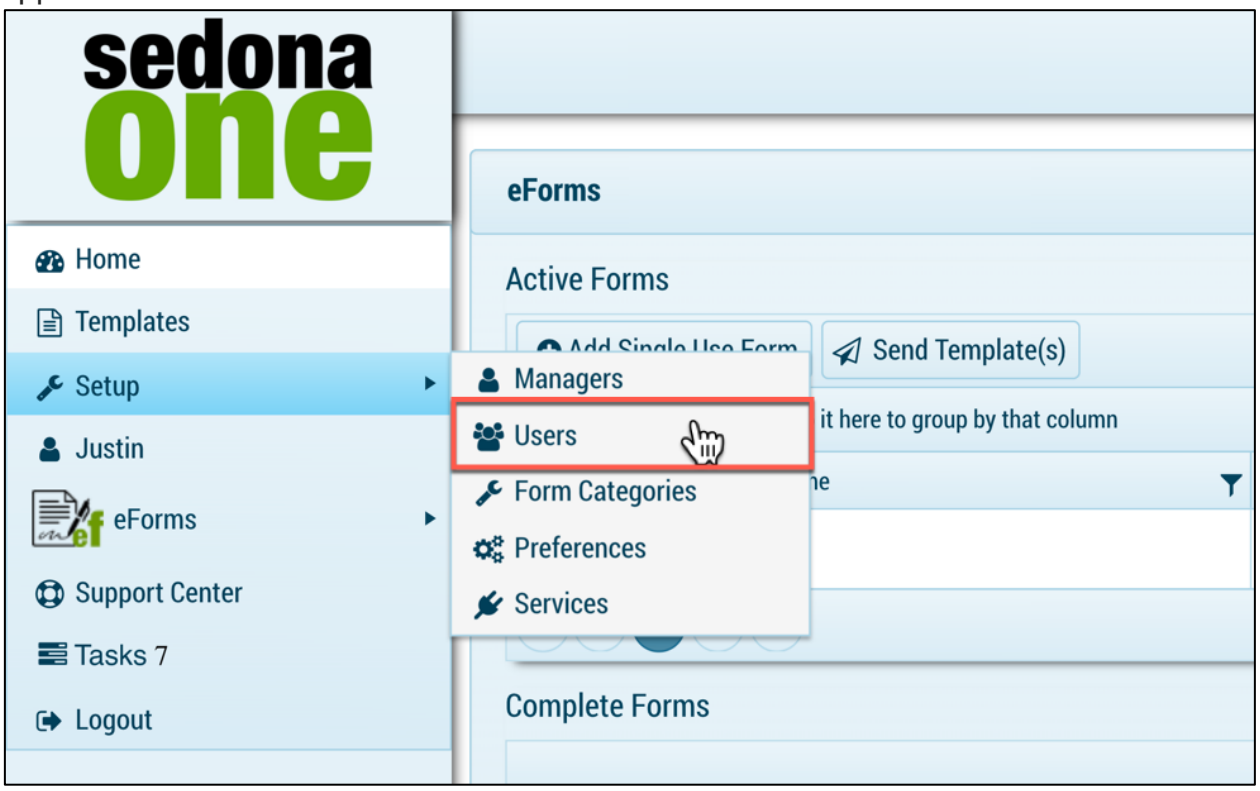
Setup Components

The setup tabs are:

- **Managers:** List all users that are managers and assign users under them.
- **Users:** Users whom will access the eForms application.
- **Form Categories:** Naming convention to help group and sort by form type.
- **Preferences:** Basic account setup for your company.

Users

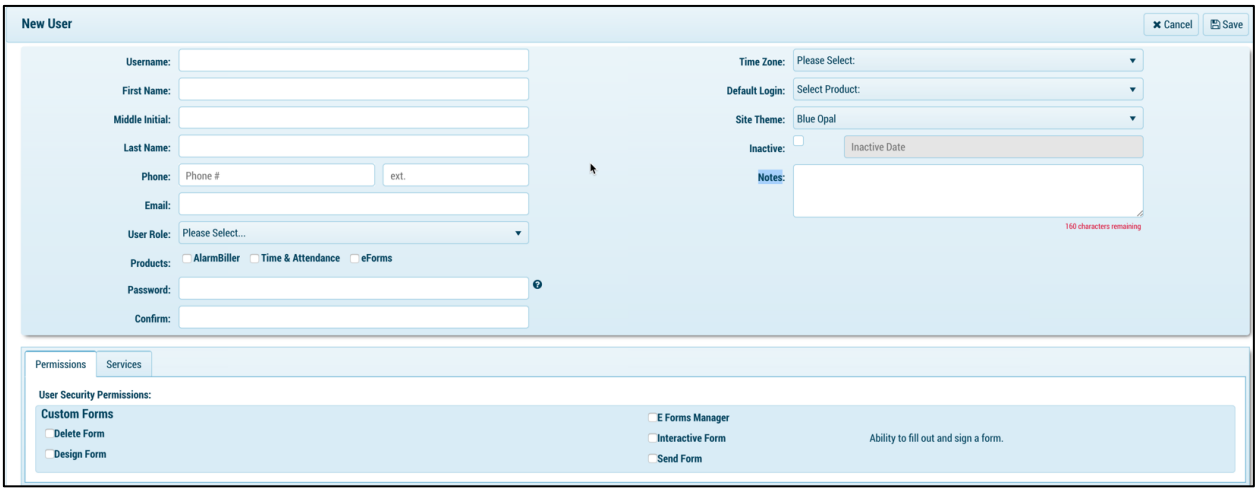
The users tab list all of your current users in eForms. The username is used to log into the system and each user will have a password that is assigned when the user is created. If the user is logged in you may view in the Users tab and see if they are in the application.



Adding a User

1. Navigate to **Setup** > **Users** as shown in the figure above.
2. Select + Add User.

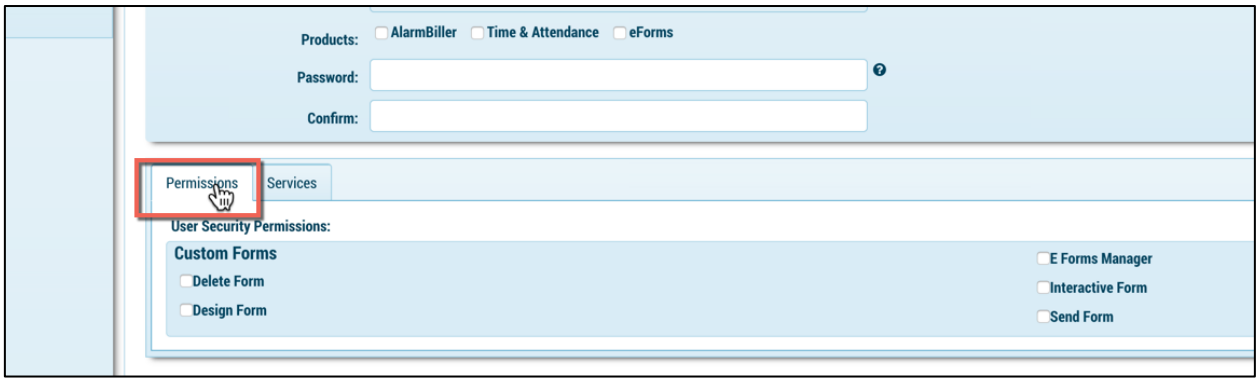
3. Fill out the following fields:



- **Username:** Unique username for the specific user that will be used to login the application.
- **First Name:** First name of user.
- **Last Name:** Last name of user
- **Phone:** User phone number.
- **Email:** Email address of user, this will be the email address completed forms will be sent to.
- **User Role:** Select the drop down for pre-set user roles. The user role will have permissions checked off in the permissions tab. The permissions may be overridden.

- **Products:** Check which products the user will be able to access. You may select more than 1 if you are utilizing multiple SedonaOne modules.
  Note: There is a cost associated with SedonaOne Modules, please contact *justind@perennialsoftware.com* for more information.
- **Password:** Password the user will use to login to the SedonaOne application. The user may reset after logging in for the first time.
- **Time Zone:** Select the appropriate time zone for the user.
- **Default Login:** If the user has access to multiple SedonaOne module's the application selected will be the default application that appears when the user logs in.
- **Site Theme:** Site theme will have different colors, font and display based on the theme you pick.
- **Inactive:** If checked this will inactivate the user.

User Security Permissions



- **Delete Form:** If checked the user will have the ability to delete templates and active forms.
- **Design Form:** If checked the user will have the ability to modify a template.
- **eForms Manager:** If checked the user will be able to be setup as a manager with user's underneath.
- **Interactive Form:** If checked the user will have the ability to fill out and sign a form.
- **Send Form:** If checked the user will have the ability to send a form.

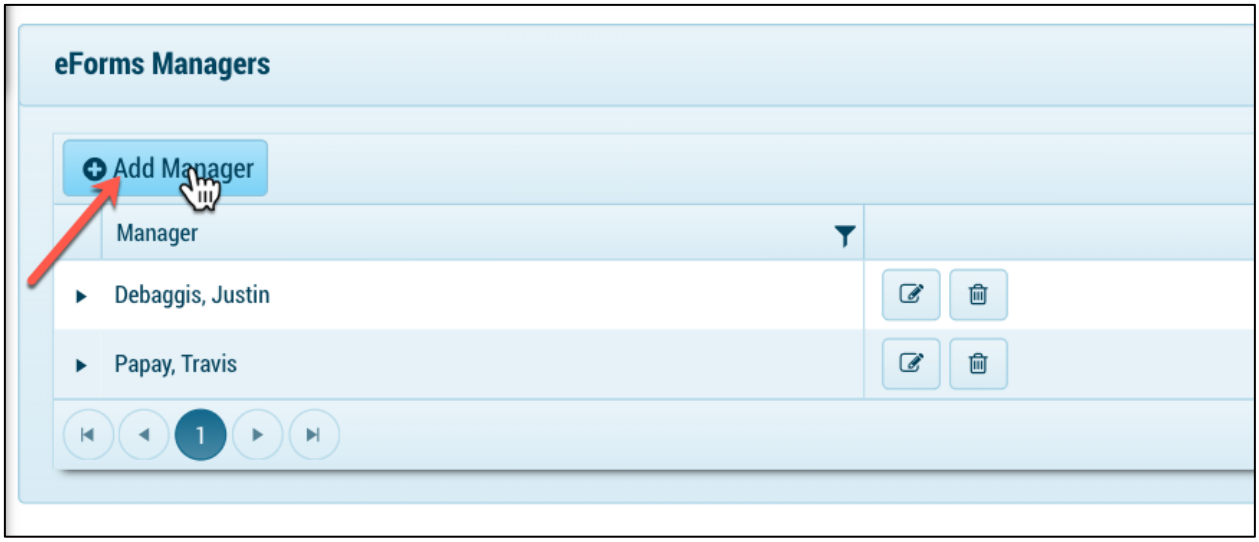
Note: When all of the fields are filled out, select save in the top right. You may now provide the URL, username and password you have set for your user to login.

Managers

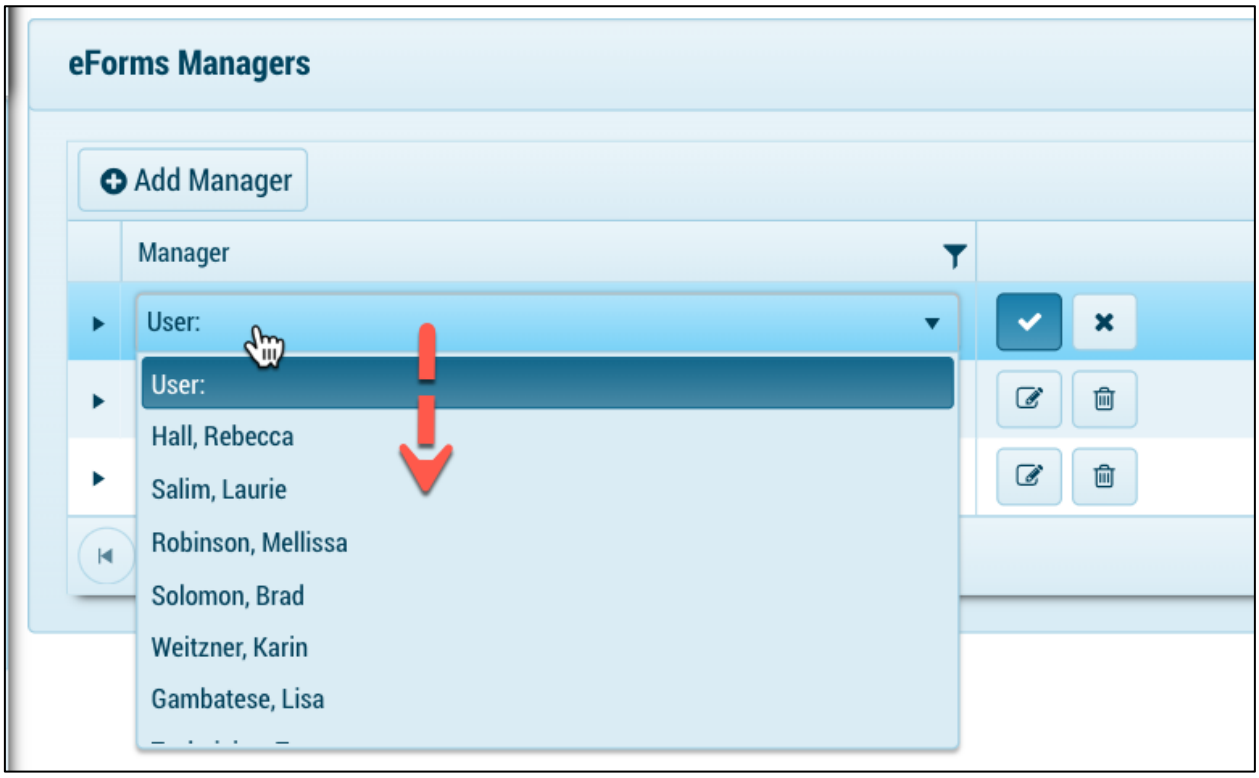
A manager role must be check off in the user under permission. A manager in eForms has the ability to oversee other users open & completed forms in the home screen. You may assign as many users as you would like under a manager role. You may also create multiple users as managers and may have a scenario where a user with a manager role oversees another user with a manager role.

Add a Manager

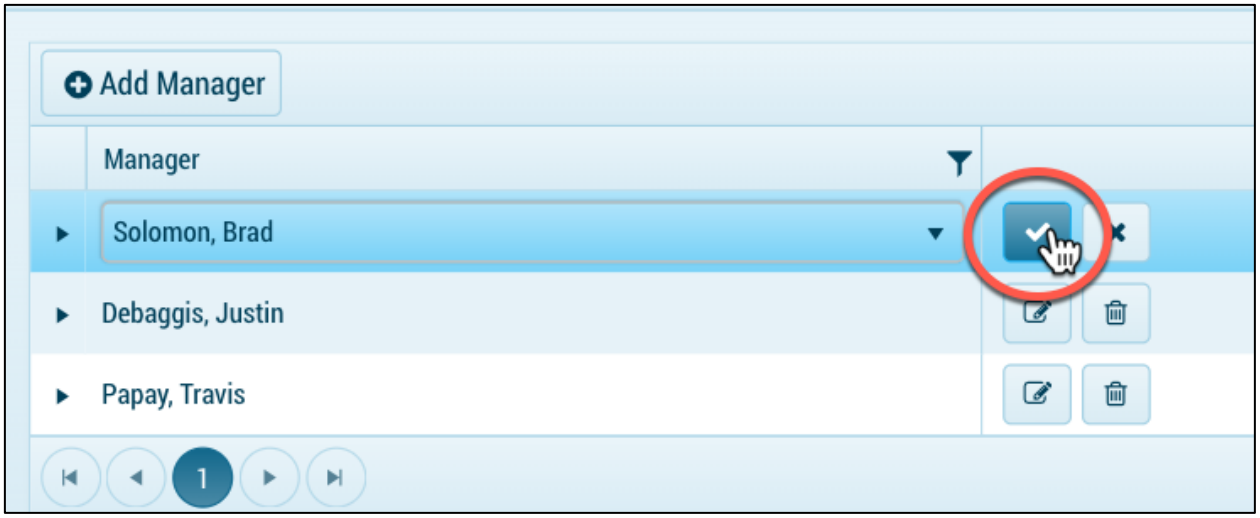
1. Navigate to **Setup** > **Managers**.
2. Select +Add Manager.



3. Select from the drop-down list and pick the manager.

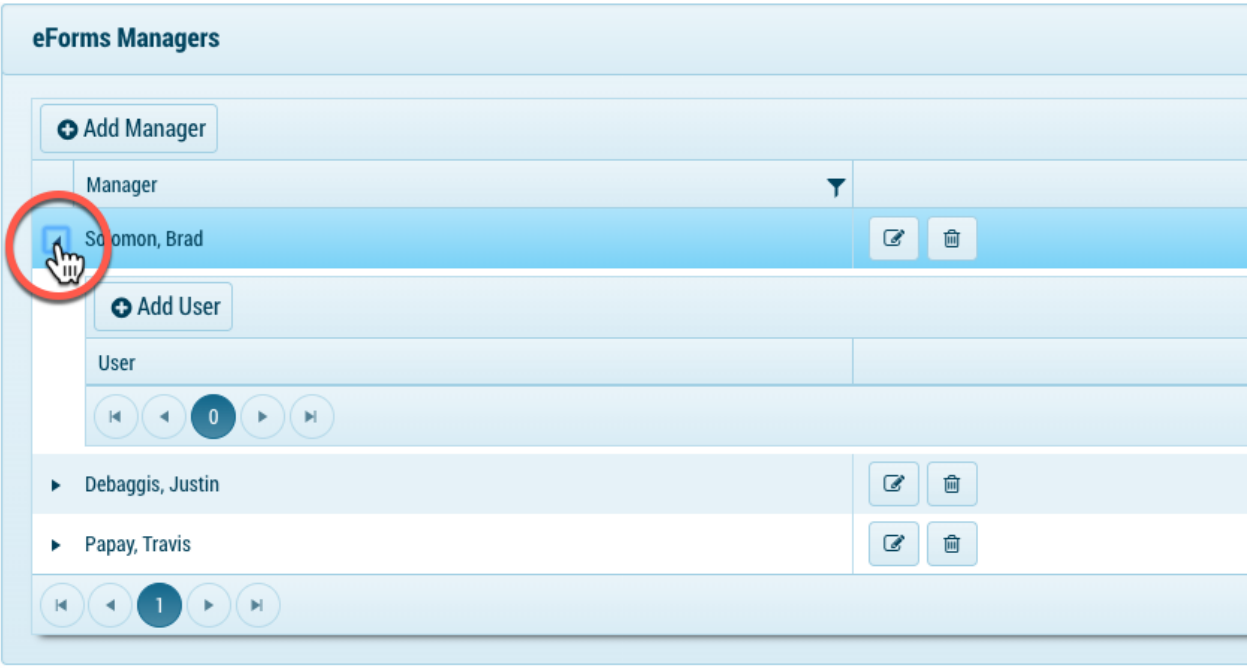


4. Select the  icon.

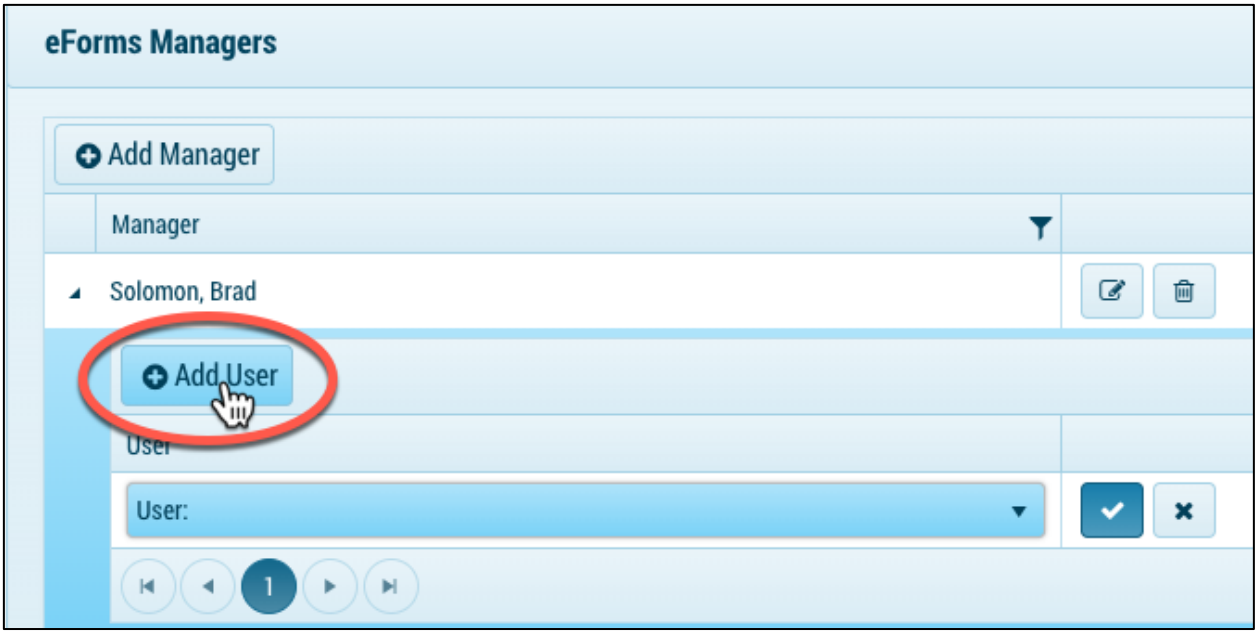


Assign a User to a Manager

1. Navigate to **Setup** > **Managers.**
2. Select the drop-down section next to the manager you would like to assign users.

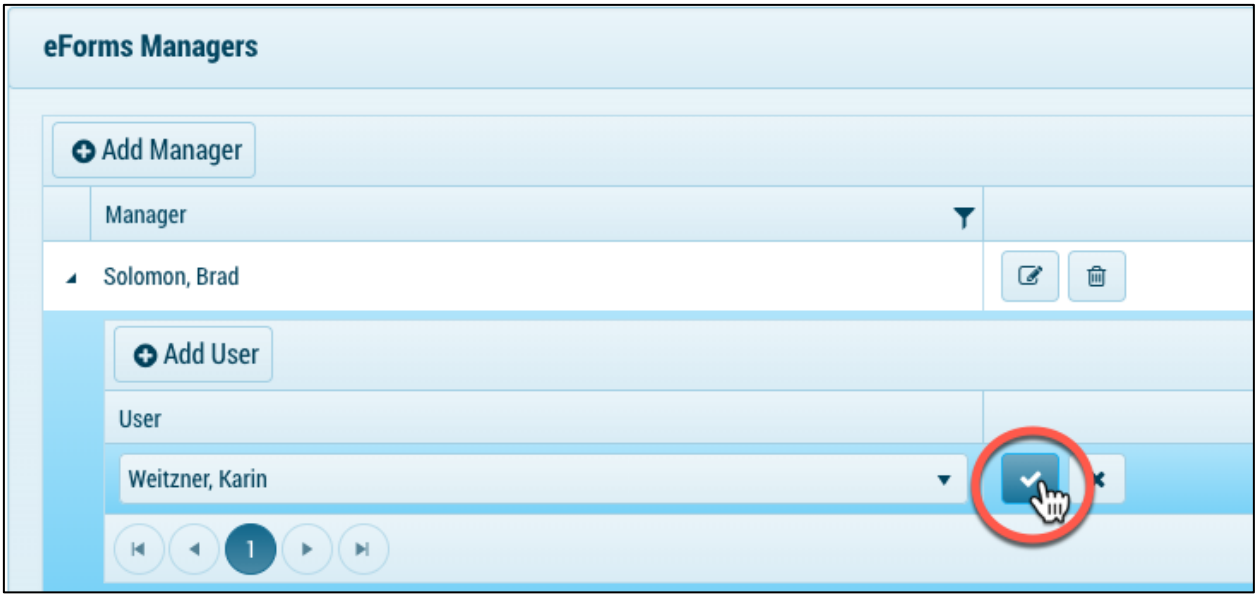


3. Select +Add User.



4. Select the appropriate user.

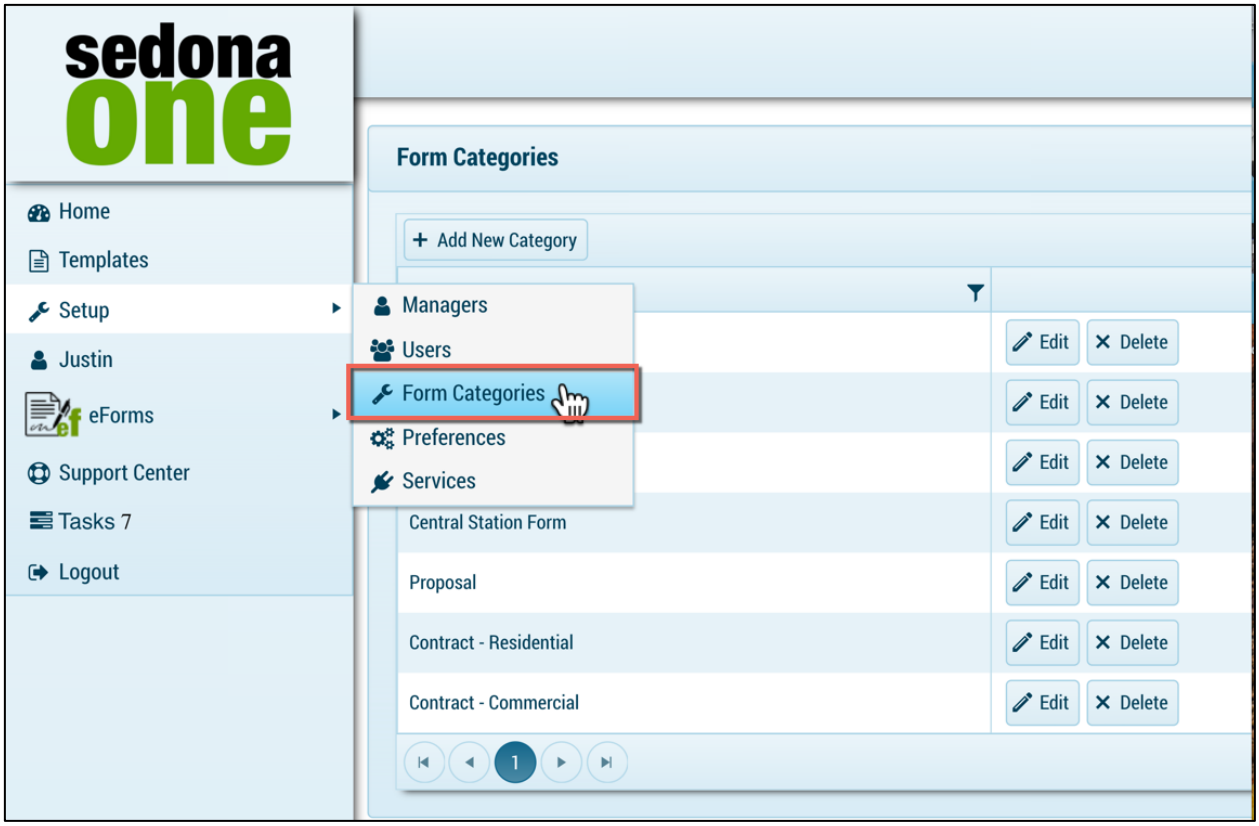
5. Select the  icon.



Note: For each user, you would like to assign to the manager repeat the steps listed above.

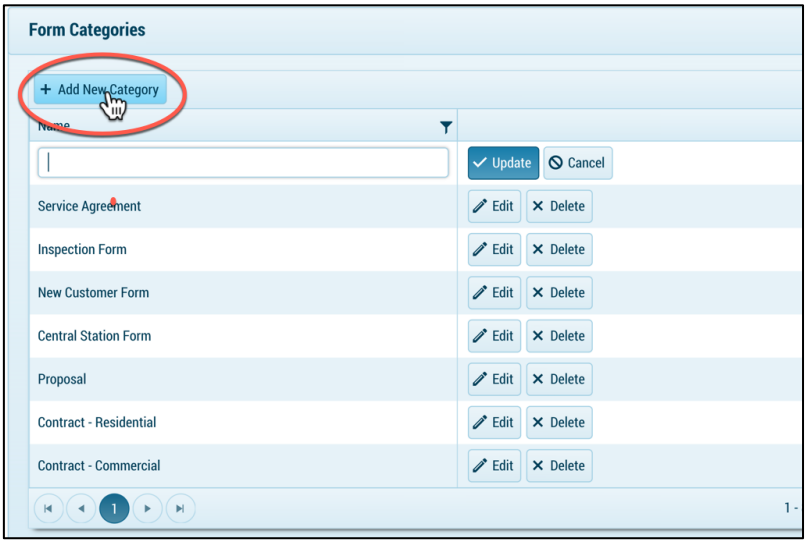
Form Categories

Form Categories are available to select when creating templates. They are used to assign to a specific form to assist with grouping like templates. For example, if you have 30 templates you may have them grouped with categories such as inspection, contracts, internal forms, etc. You may create as many categories as possible and filter in the templates tab by specific category.

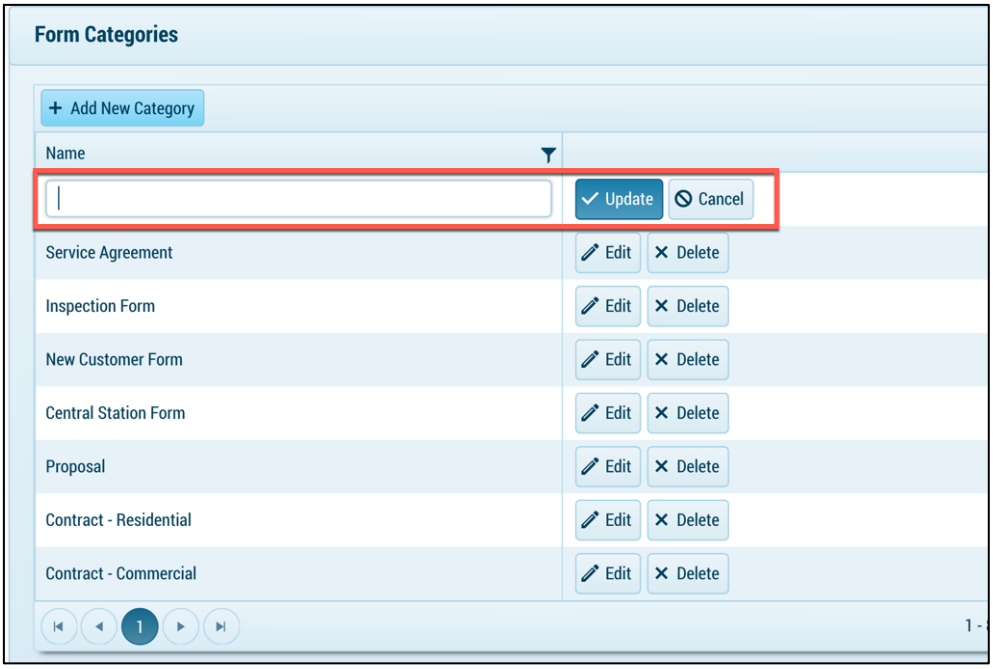


Add a Category

1. Navigate to Setup > Form Categories.
2. Select +Add New Category.



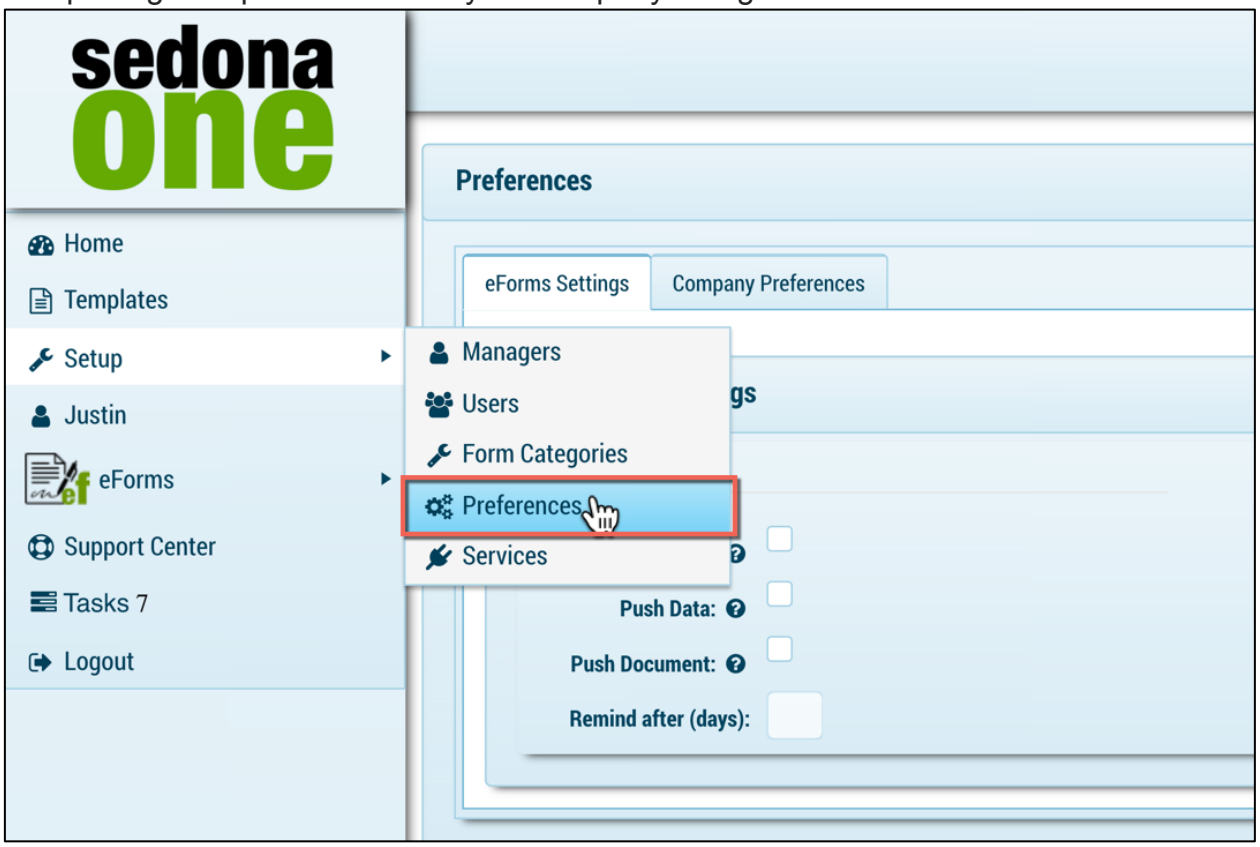
3. Name of the category that will appear in the drop down when add a template.



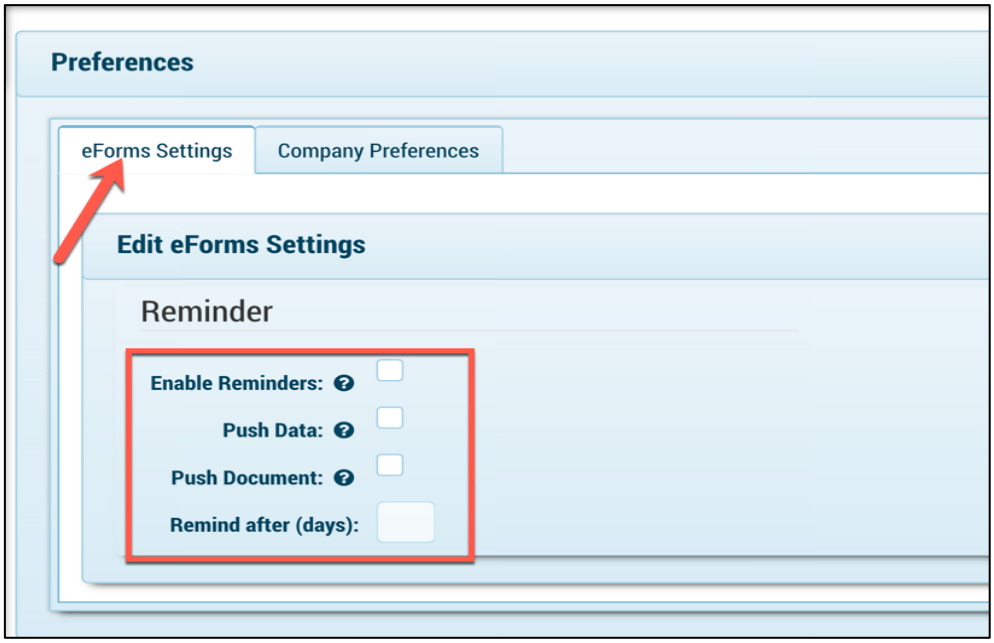
4. Select **Update** to add the new category.

Preferences

Setup the global preferences for your company and general information.



eForms Settings



- **Enable Reminders:** If checked a reminder email will be sent after a set number of days have passed with no activity from the recipient. The # of days is based on the number entered in **Remind after (days)** above. If this is not checked you may still manually send reminders for individual forms.
- **Push Data:** Push Data currently does not work for SedonaOffice customers.
- **Push Document:** When all recipients have completed a form, the completed PDF will automatically save as a document in the customer documents in SedonaOffice (SedonaDocs and SedonaAPI are required for this feature)
- **Remind after (days):** If enable reminders is checked this will be the number of days for reminders to be delivered.

Company Preferences

- **Address:** Company Address
- **Phone:** Companies Phone Number
- **Logo:** Upload your company logo or drag over **Select Files**. This will brand the eForms portal with your logo and emails to recipients.

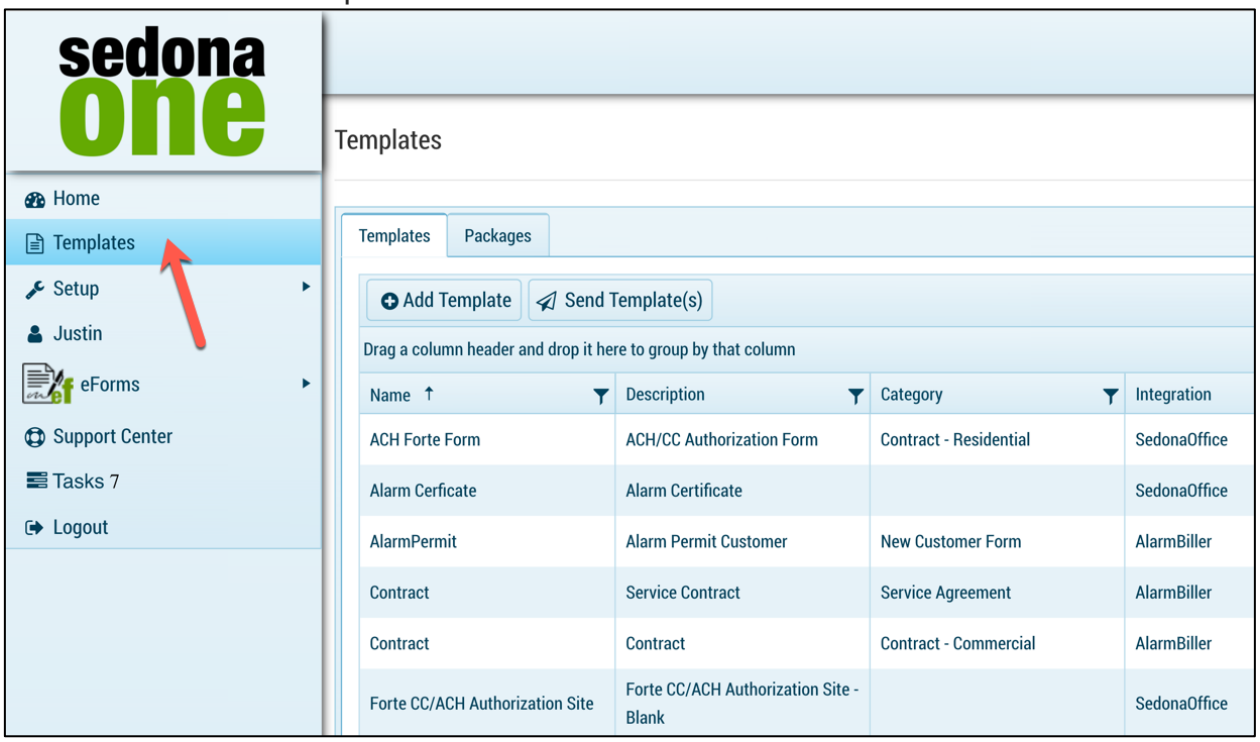
Note: Select save after any changes.

Services

The Services tab is to be used by the SedonaOne staff for API integrations.

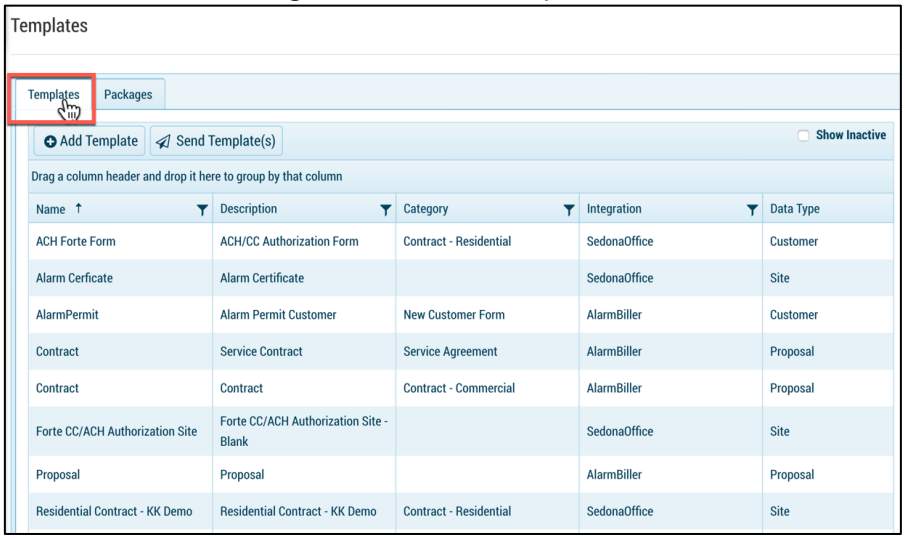
Templates

Templates are used to assist in streamlining the sending process when you send the same document frequently. Templates are created from uploading a PDF or using eForms WYSIWIG editor. When building a template, you add electronic fields to create an electronic document and also capture electronic signatures. You may create unlimited number of templates.



Templates Tab

The templates tab shows a list of all available templates in your library. To edit or design the form, select design next to the template.

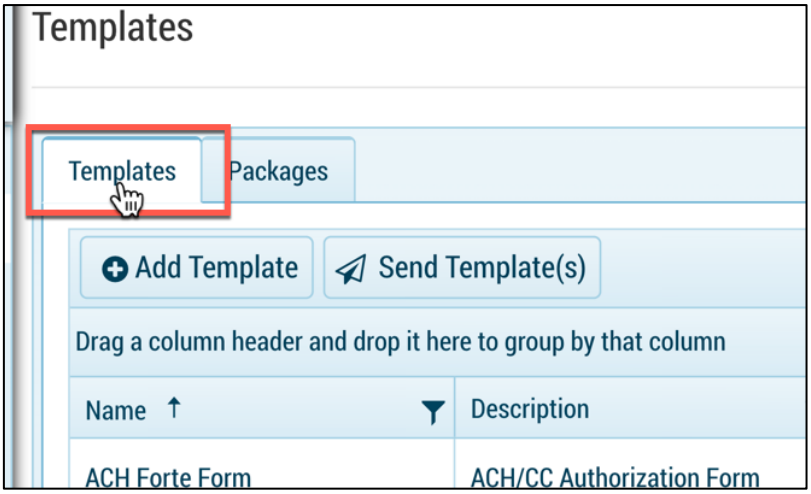


Templates Tab Fields

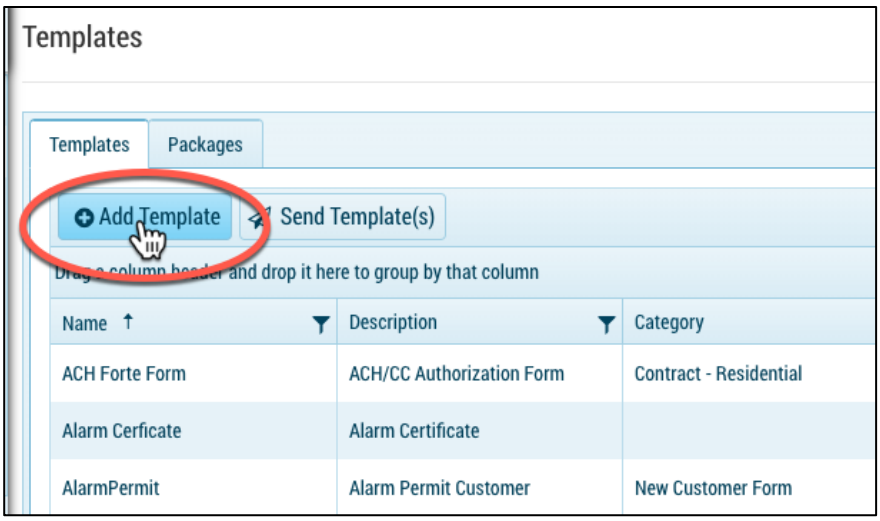
- **+ Add Template:** Select this button to add a new template.
- **Send Template:** Select to send a template electronically.
- **Name:** Name that was entered by the user to identify the template e.g. All-in-One Contract. When selecting a template to send the drop-down list will show the name of the template.
- **Description:** Description that was entered by the user to identify the template. This may be the same as the name or more detailed.
- **Category**: Category that was entered by the user to identify the template. The categories are created in setup discussed in the setup section of this document.
- **Integration:** If the template is integrated with SedonaOffice fields the integration will read SedonaOffice. If no integration is active the field will read none. The integration allows templates to integrate with SedonaOffice fields based on the data type. (Integration is only available for customer whom have purchased the SedonaAPI)
- **Data Type**: Fields in SedonaOffice (customer, site, system) that the template may integrate with.
- **PDF Backdrop?:** This will indicate whether the integration was activated for this template or not.
    - Yes: PDF was uploaded.
    - No: No PDF was uploaded.
- **Edit:** Select edit to change the name, description, or category for a template.
- **Copy:** Copy the template and make any adjustments to the copied template. We recommend selecting edit on the copied template and change the name.
- **Design:** Go into design mode for the selected template to make adjustments or add new fields.
- **Delete:** Deleting a template sets it as inactive.
- **Show Inactive:** Show inactive shows a list of all inactive forms.

Creating New Templates

1. Navigate to **Templates.**



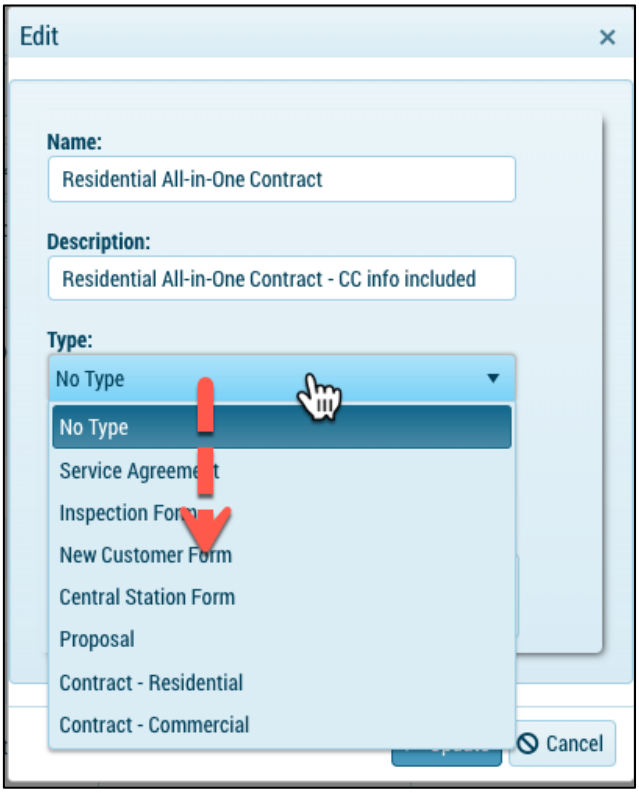
2. Select +Add Template.



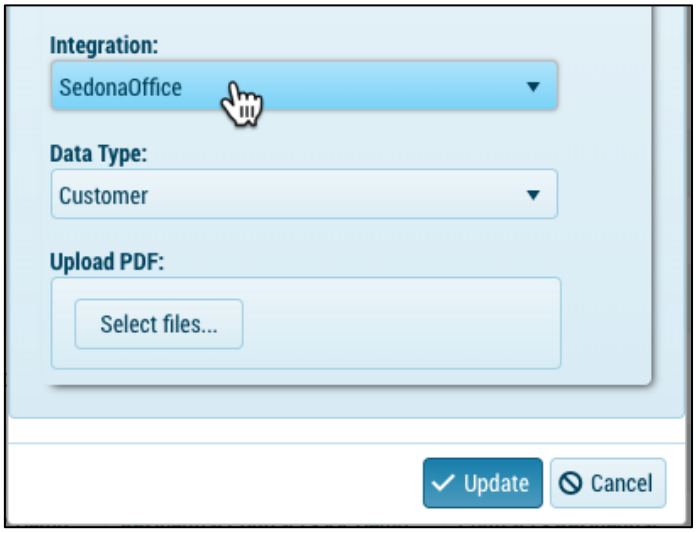
3. Enter in the name and description
   - **Name:** Name of your template (Residential All-in-One Contract)
   - **Description:** Description of your template may the same as the name or more detailed description of the form.

   Note: if you have multiple contracts for example, be descriptive with the naming so when sending the templates, you select the correct one.

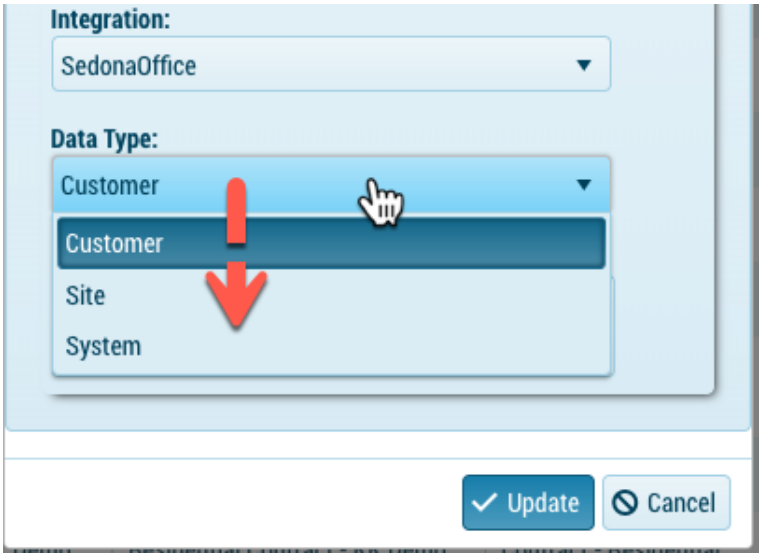
4. Select the type drop down lists (pulls from form categories created in setup).



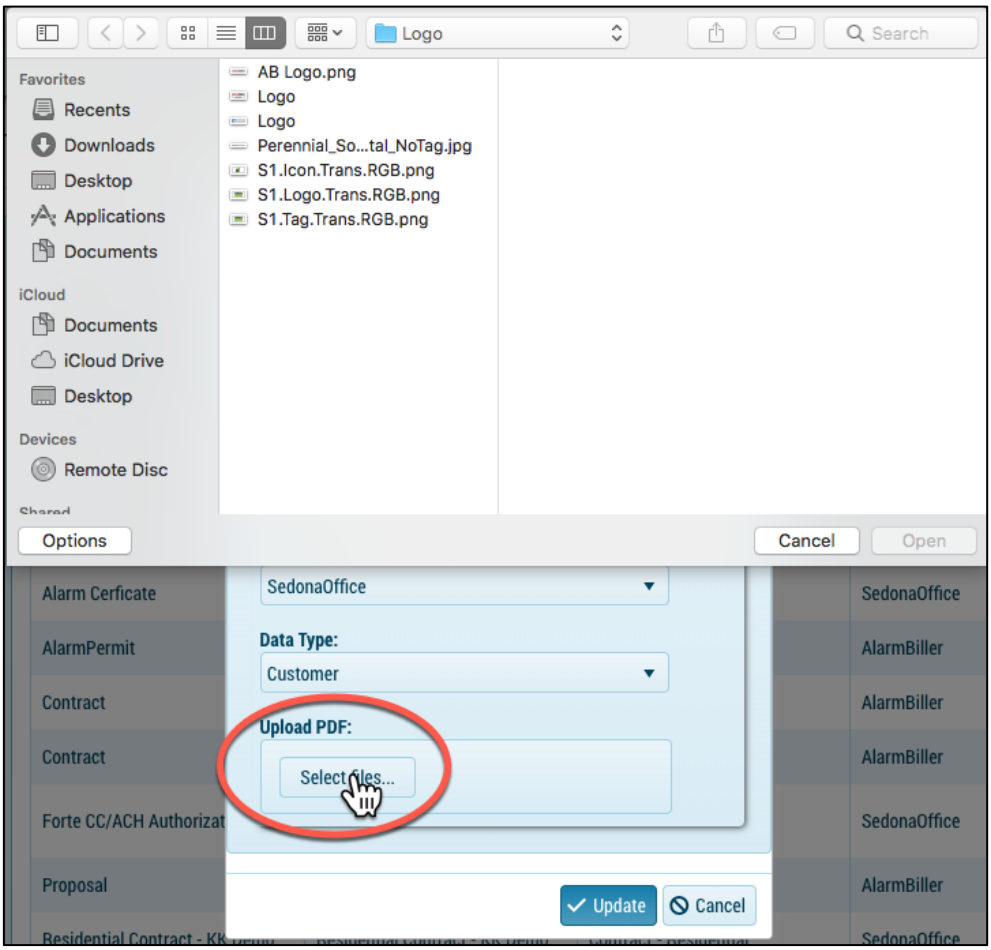
5. Select Integration and select SedonaOffice.
1. Note: If you have purchased the SedonaAPI and would like to integrate with SedonaOffice, select SedonaOffice (see SedonaOffice Integration for more details).



6. Select **Data Type** (appears only if integration = SedonaOffice) and based on the level selected you will have access to SedonaOffice fields. These fields can be assigned to a template and merge data onto the form when sending.
   - **Customer:** Provides shared SedonaOffice fields from the customer level.
   - **Site:** Provides shared SedonaOffice fields from the customer and site level.
   - **System:** Provides shared SedonaOffice fields from the customer, site and system level.

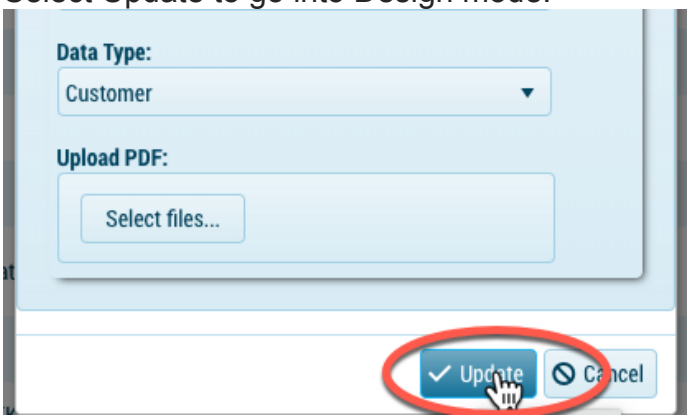


7. Select a PDF file from your computer by selecting select files or drag a PDF over **Select Files**. Once the file turns green and reads 100% you may select update to access design mode.



8. If no PDF is uploaded you will have the ability to use WYSIWYG editor to customize a template using a blank canvas.

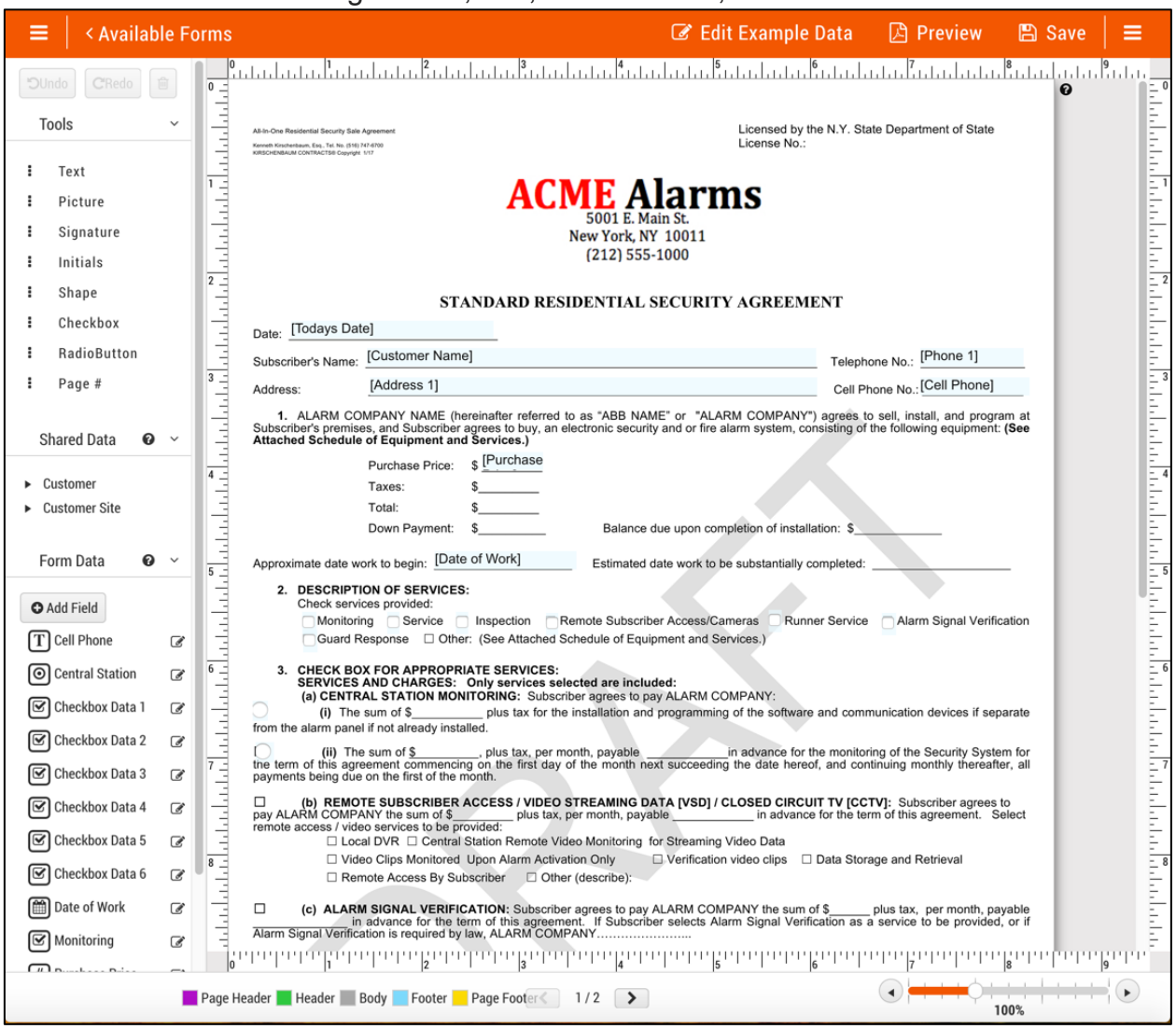
9. Select Update to go into Design mode.



Note: Whether you uploaded a PDF or are utilizing the WYSIWIG editor you will have the tools, form data options and shared data (if utilizing the integration) to design your template.

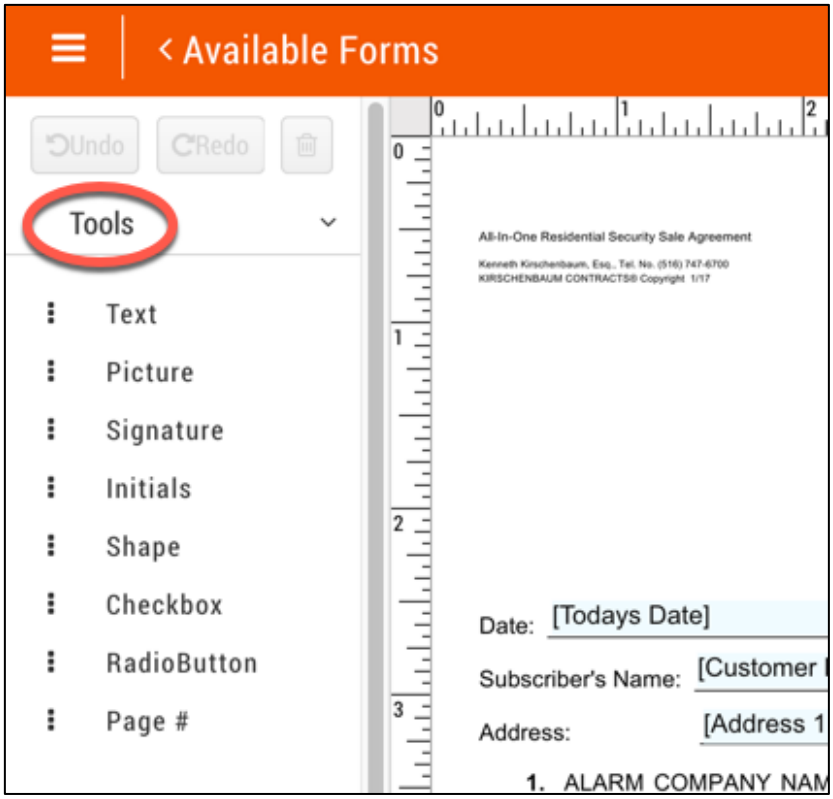
Design Mode

When you add a new template, you will automatically enter into design mode. Design mode allows you to interact with your form by merging shared data and creating electronic fields such as signatures, text, radio buttons, initials and much more.



Tools

Tools are quick start items that are commonly used on templates. Each item must be clicked and dragged onto the form. Once added look on the right of your form in the side bar for different options to customize the fields you dragged in.



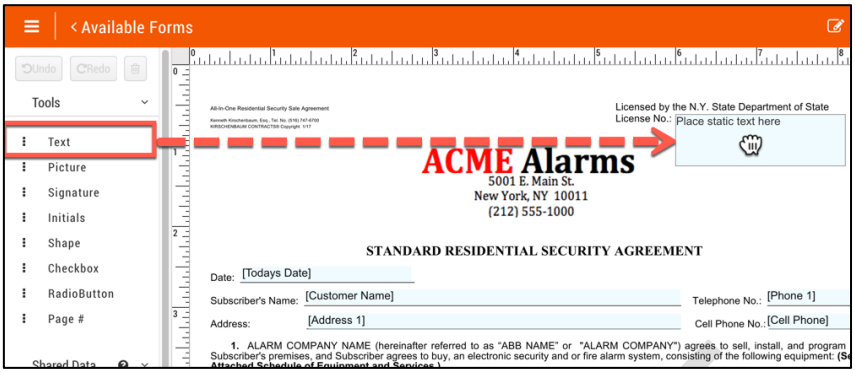
Tools Components

- **Text:** Text Box is used for adding static text that will be fixed on the form.

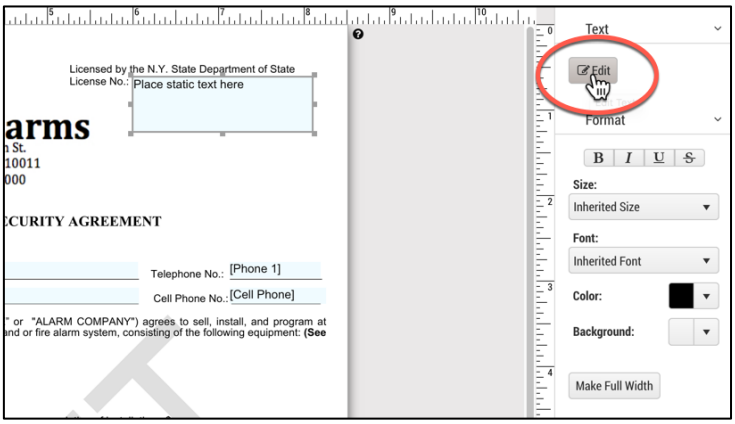
  Note: This is not an editable text field recipients will interact with!
- **Picture:** Picture allows you to add a new picture onto a form or access a library of previously used pictures.
- **Signature:** Signature is a required field for a recipient to sign electronically. Place this field were a recipient must sign the document. After added onto the form, it adds the field to **Form Data**.
- **Initials:** Initials is a required field for a recipient to enter initials. It captures and I.P. address and geolocation (if the user has it enabled). After added onto the form, it adds the field to **Form Data**.
- **Shape:** Shape is a straight line, that can be used to break apart text, underline text fields and any other customizations to your template.
- **Checkbox:** Checkbox is an optional field and can't be set as required. Once dragged into the form, it will add the item as a **Form Data** field in which you may label.
- **Radio Button:** A radio button can be made a required field and can be grouped with multiple buttons. Once dragged into the form, it will add the item as a **Form Data** field in which you may label.
- **Page #:** Page # allows you to list the page number for each page if you have multiple pages. This will be primarily used with the WYSIWIG Editor.

Adding a Text Box

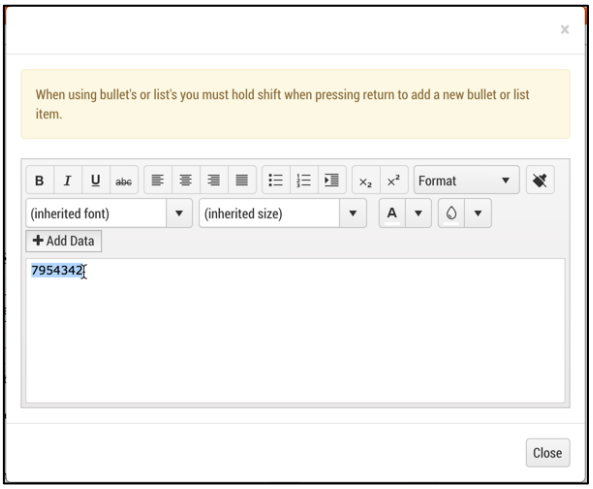
1. Click and drag **Text** from the tools section onto the template.



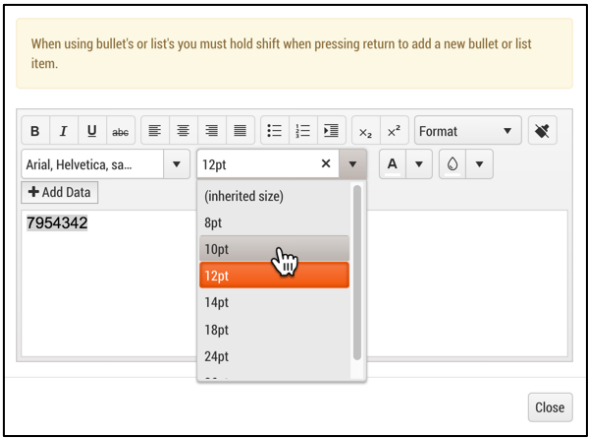
2. Select **Edit** in the right.



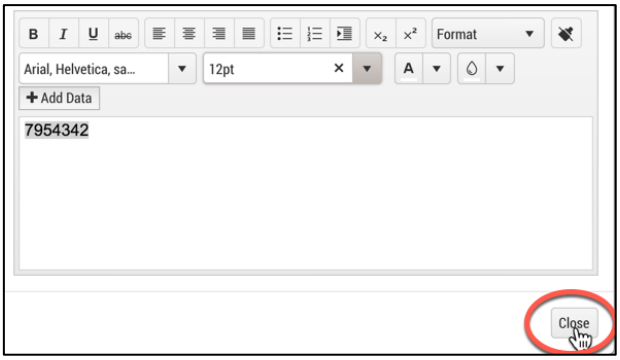
3. Type in the static text that will appear on the form.



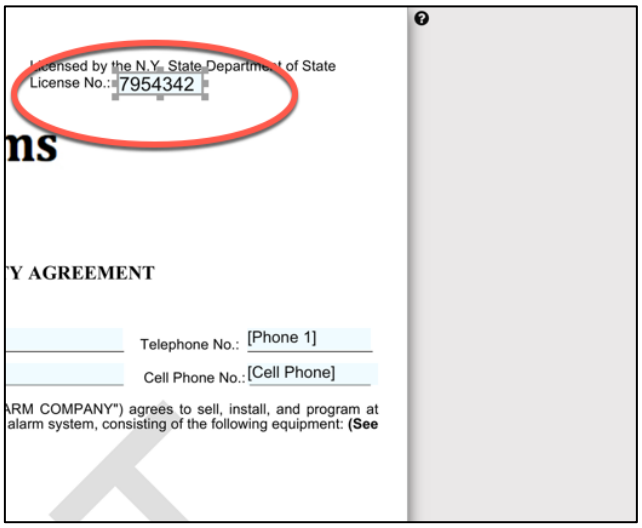
4. Format as needed (Bold, Underline, pick font, size, etc.).



5. Select **Close** in the bottom right.



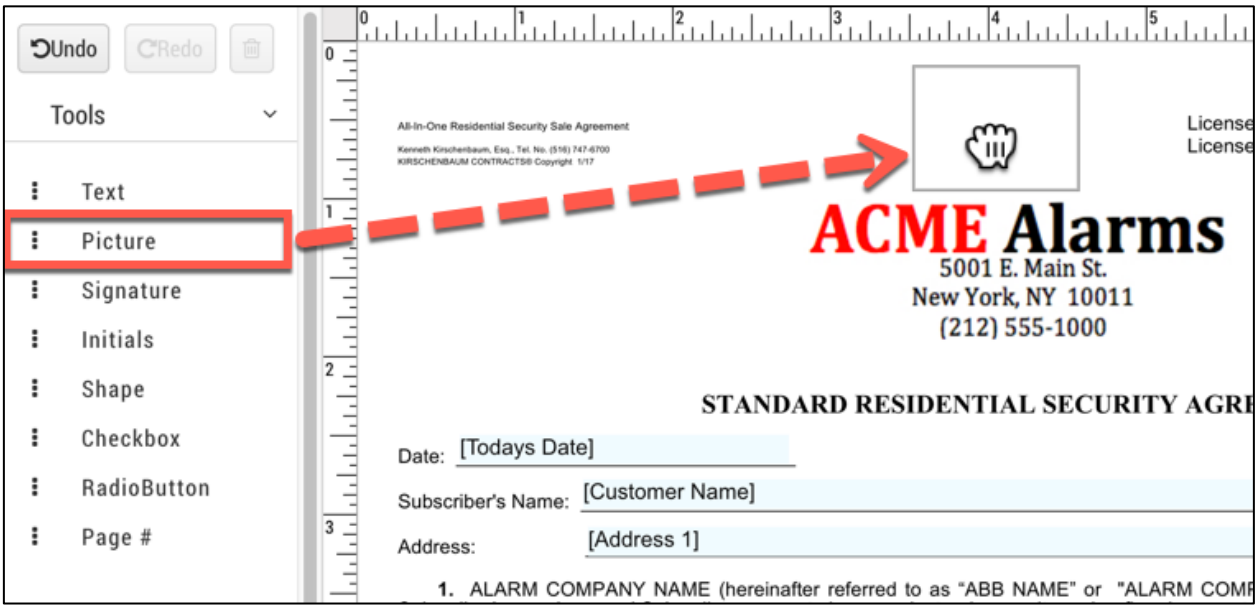
6. Drag the static text field to the correct location on the form.



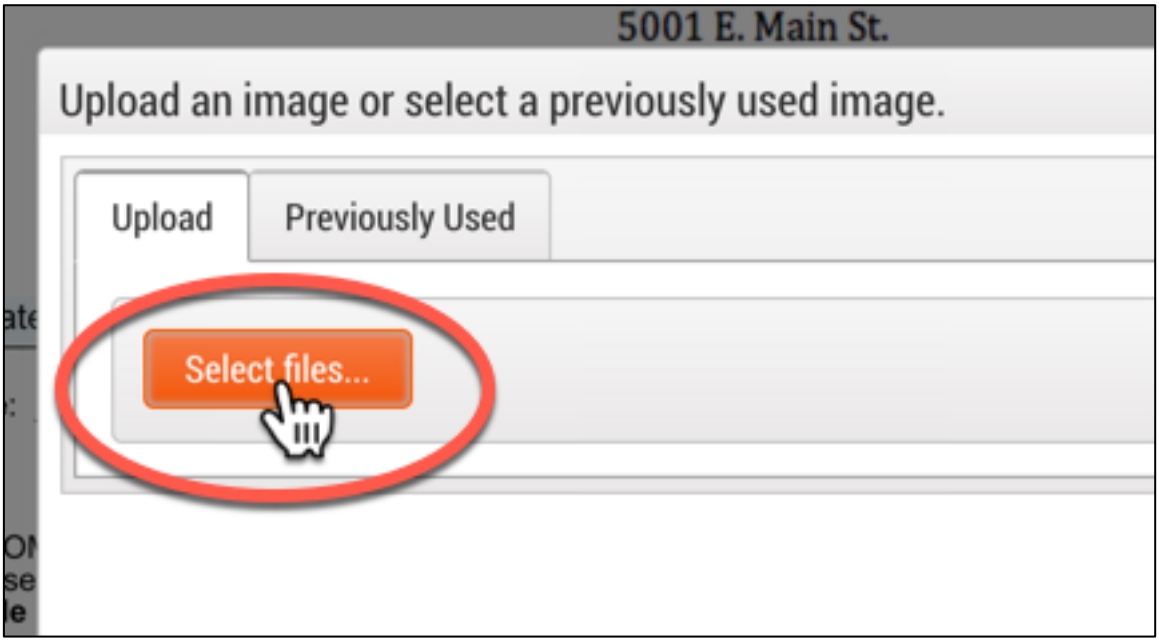
Note: The text field is not an editable text field. This is static text that will appear every time the template is delivered. If you want to create an editable text field refer to the Form Data section.

Add a Picture

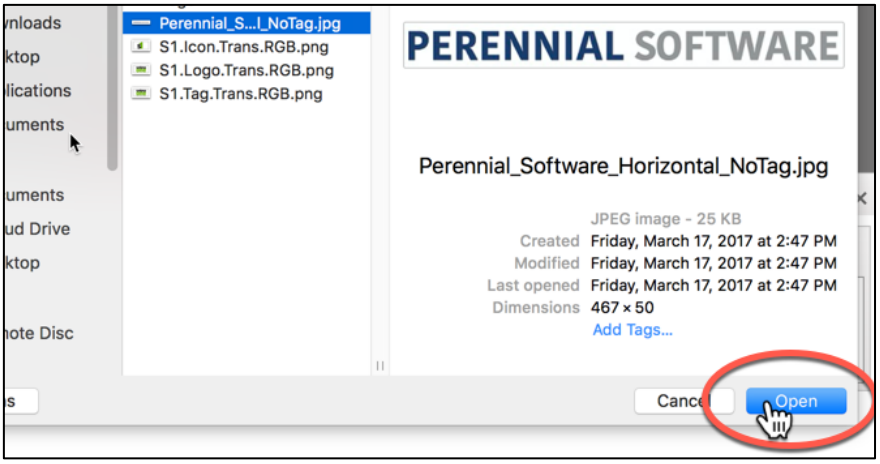
- Click and drag **Picture** from the tools section onto the form.



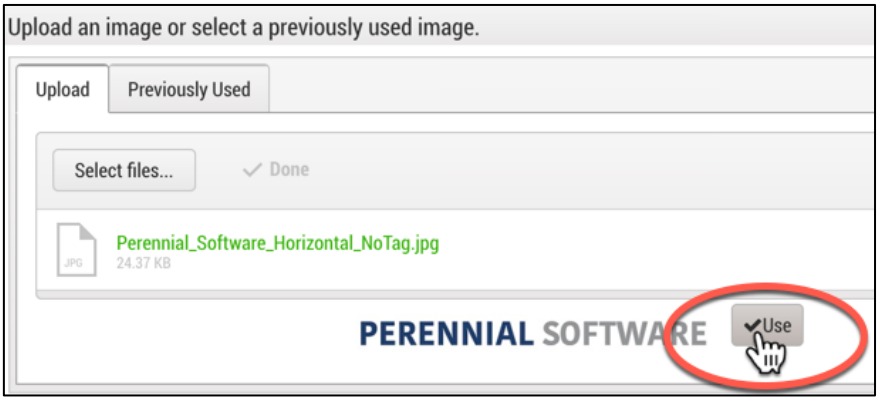
- Click Select files...



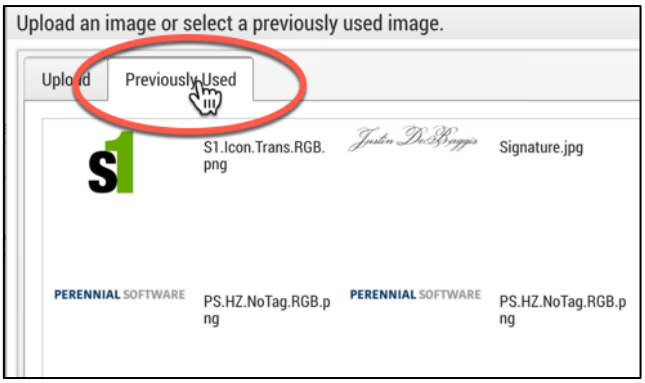
- Double Click on the image you would like to add or click and select **Open.**



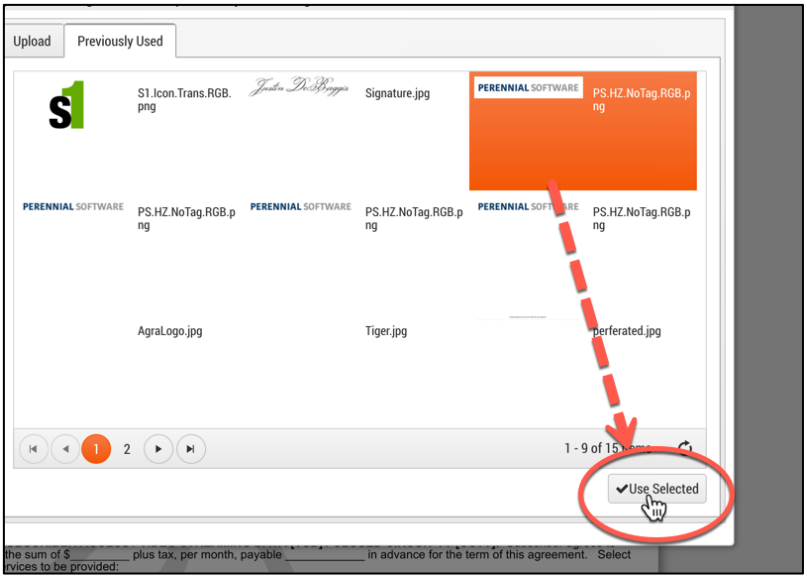
- Select **Use**.



- If you have previously uploaded a picture, select **Previously Used**.



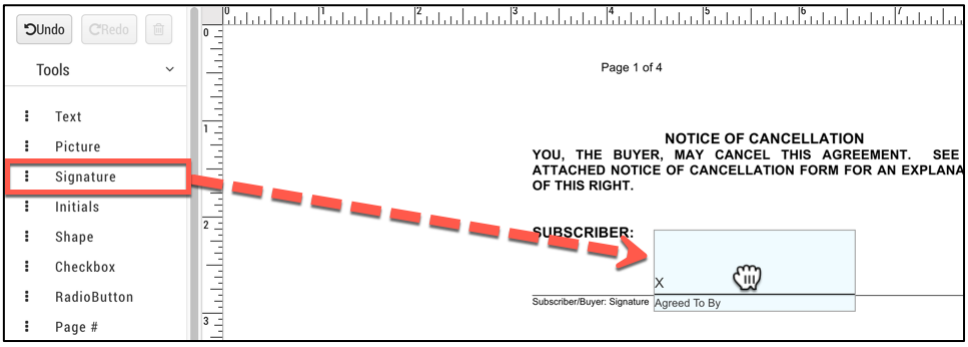
- Highlight the picture and select **Use Selected.**



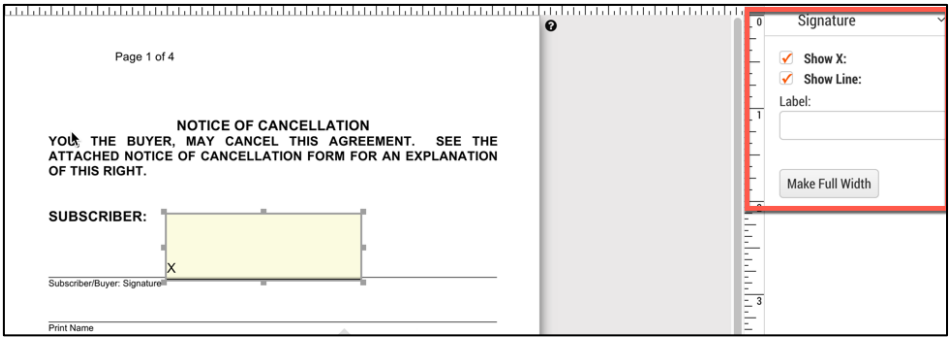
- Resize the picture as needed and drag to the correct location.

Add a Signature

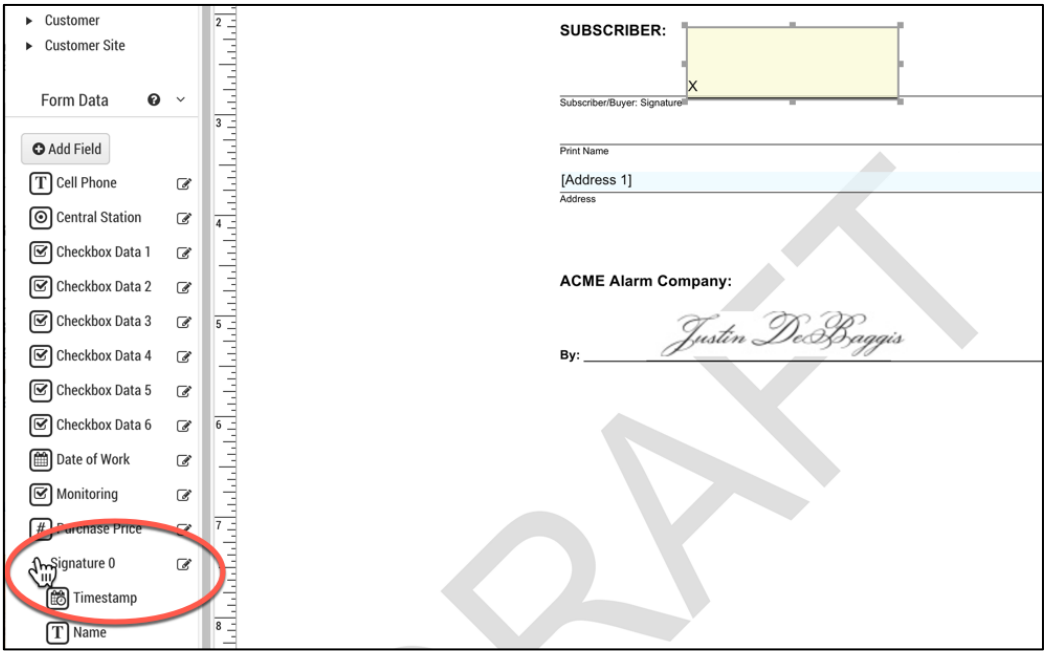
1. Click and drag **Signature** from the tools section onto the form.



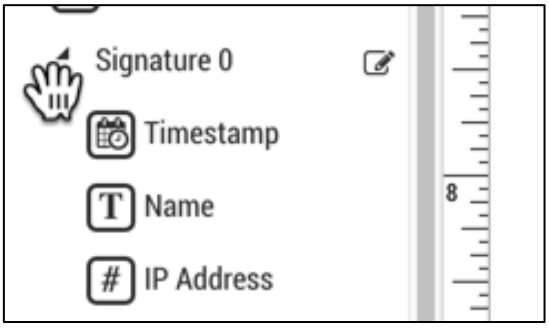
2. Navigate to the right panel and make adjustments as needed.
   Note: You may change the label under the signature, get rid of the x and the line.

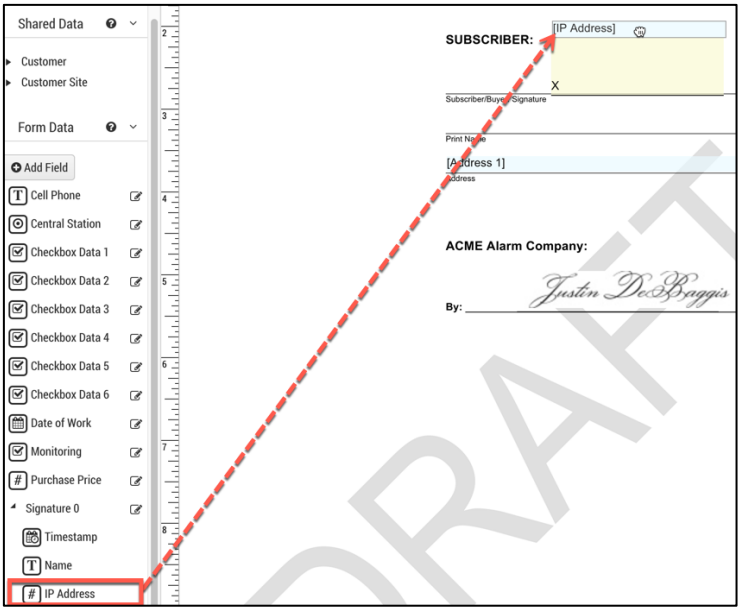


3. Navigate to Form Data and select the drop-down arrow.
   Note: When a signature field is added it creates a Form Data field.



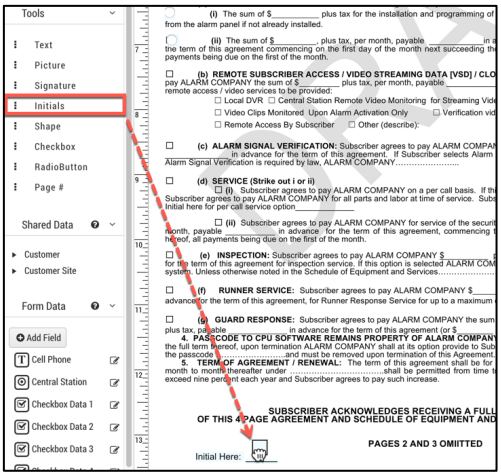
4. You may drag in the following fields and will automatically populate on the form. after the e-signature is captured:
   - **Time Stamp:** Date and timestamp the signature was captured.
   - **Name:** Name of the recipient assigned to the field whom signed .
   - **IP Address:** IP address of the device used to sign.



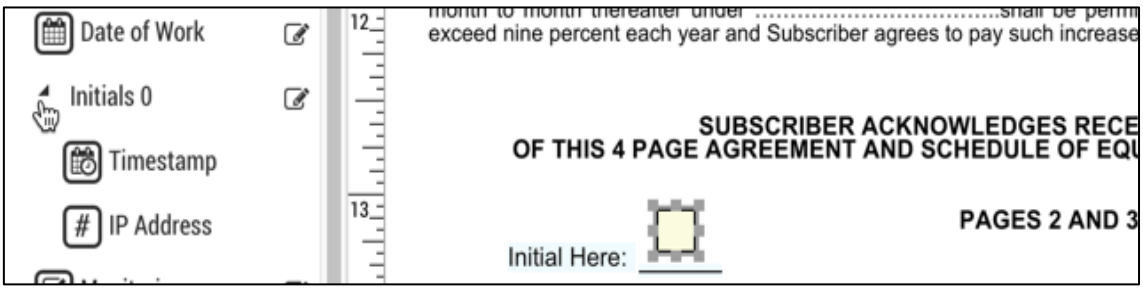


Add Initials

1. Click and drag **Initials** from the tools section onto the form.

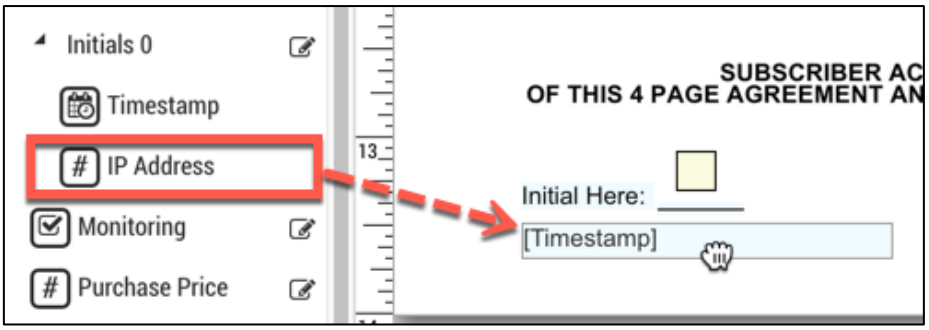


2. Navigate to **Form Data** and select the drop-down arrow.



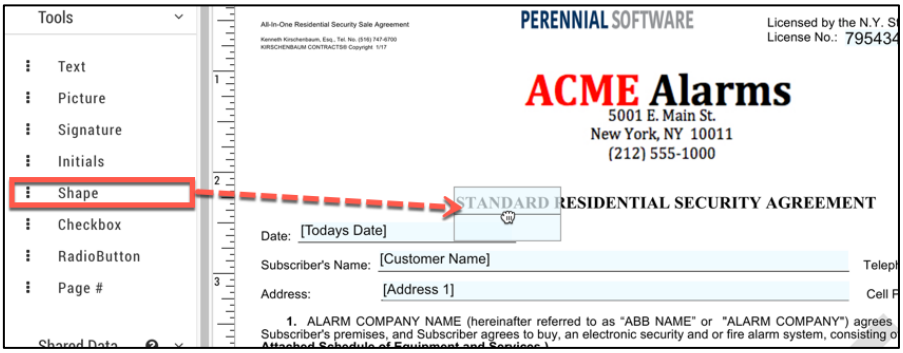
3. You may drag in the following fields and will automatically populate on the form after the e-initial is captured:

- **Time Stamp:** Date and timestamp the signature was captured.
- **Name:** Name of the recipient assigned to the field whom signed.
- **IP Address:** IP address of the device used to initial.

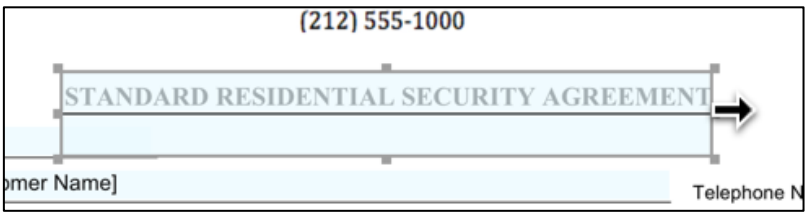


Add a Shape

1. Click and drag **Shape** from the tools section onto the form.



2. Size and position to your line.



Using Check Boxes and Radio Buttons

When adding fields to a document, there might be times when you want to let your recipient select options on the document and you might not be sure if you should use check boxes or radio buttons for the options.

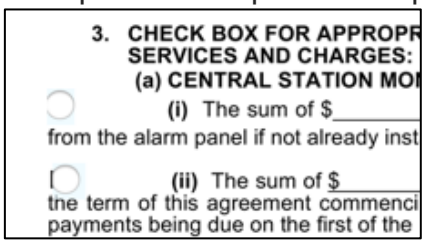
- Use check boxes in situations where a recipient can select one or more options from a list of options. They can also be used when you need a way to have a recipient select one option.
- Use radio button in situations where a recipient can only select one option from a list of options.

Check Boxes Example

The example below is a scenario where you would use check boxes. The fields are not required and you can have multiple selections.

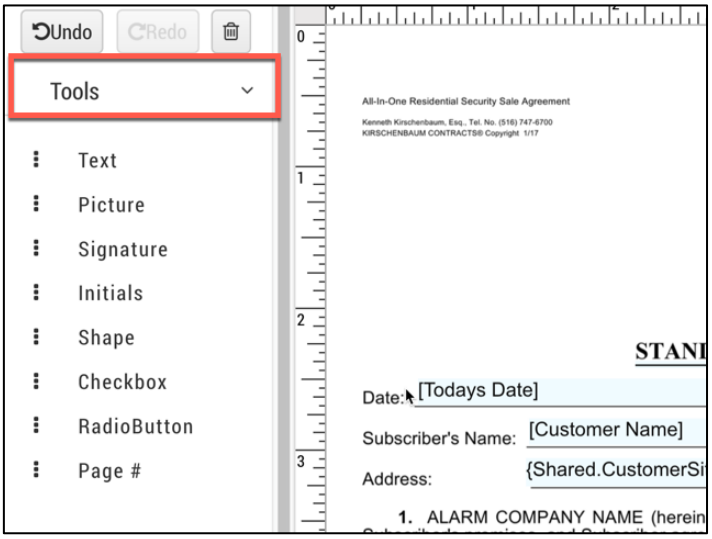
Radio Button Example

The example below is a scenario where you would use radio buttons. The recipient must pick either option 1 or option 2, but can't select both.

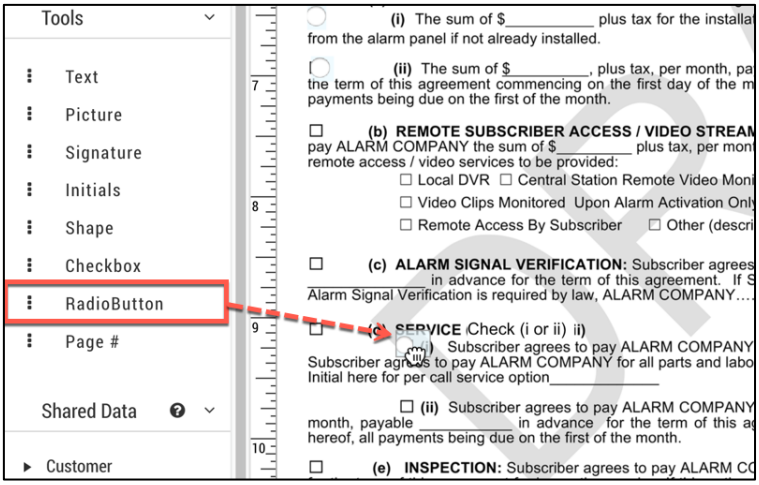


Adding a Radio Buttons from Tools

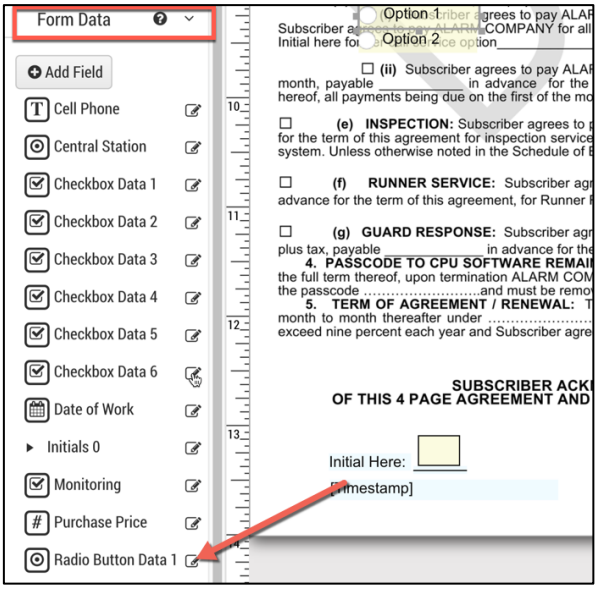
1. When in design mode on a template, navigate to **Tools.**



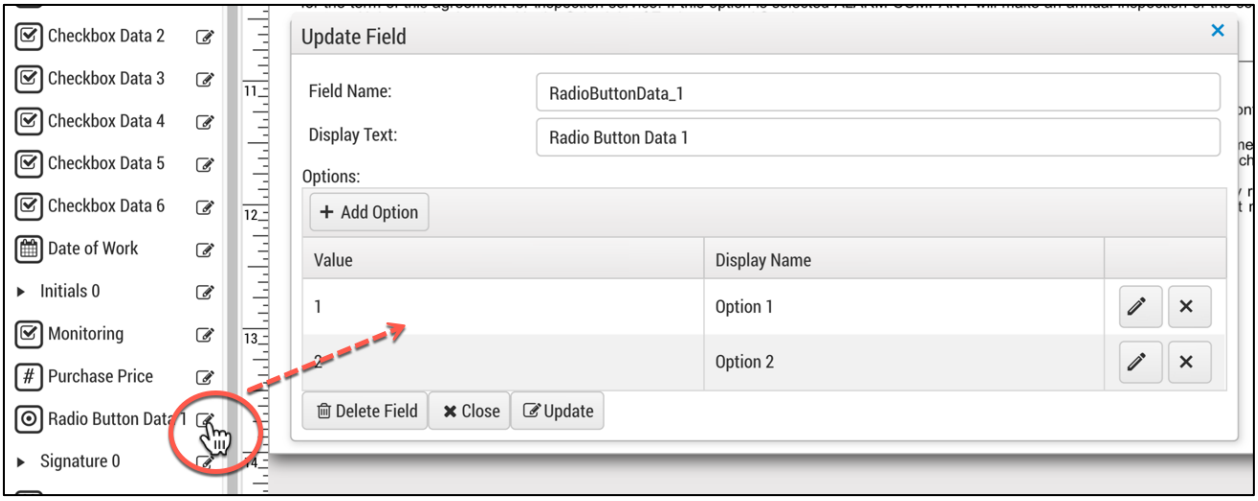
2. Click and drag **RadioButton** onto the form.



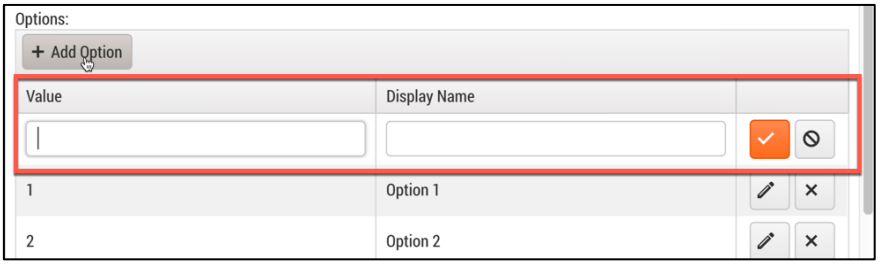
3. Navigate to **Form Data** and locate Radio Button Date #.



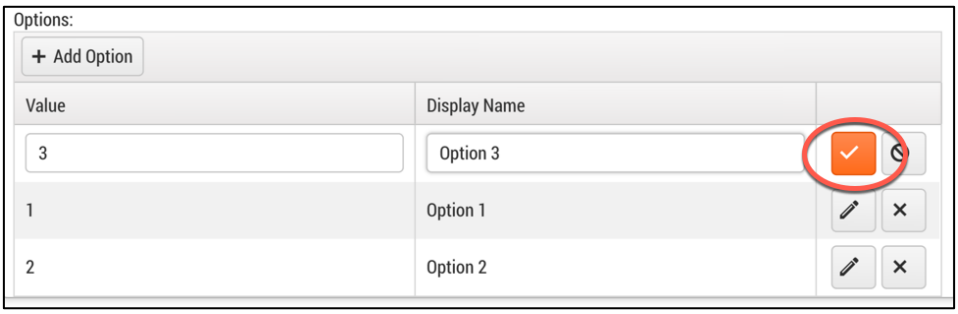
4. Select **Edit.**



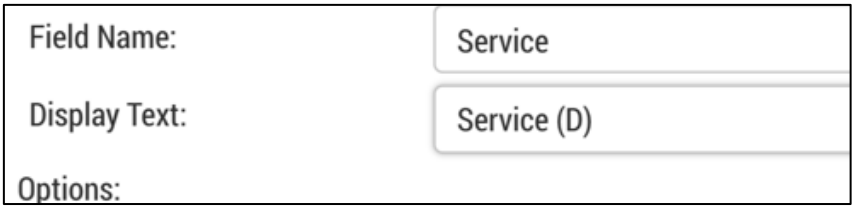
5. To add additional buttons to the grouping select **+ Add Option.**



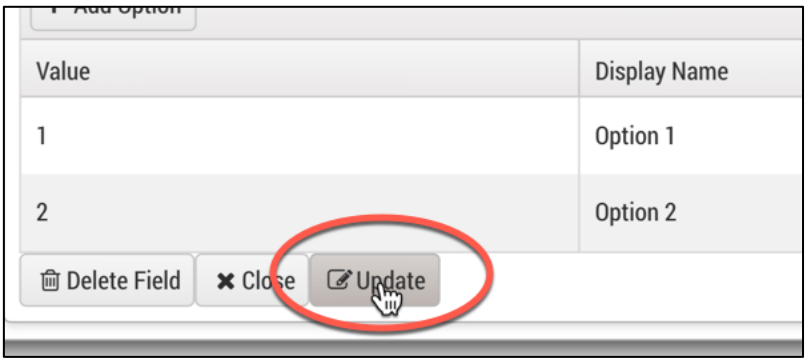
6. Enter a unique value (number in order) and a display name.
   Note: In this example, I recommend 0 or 3. If you enter a display name, you have the option to hide it.



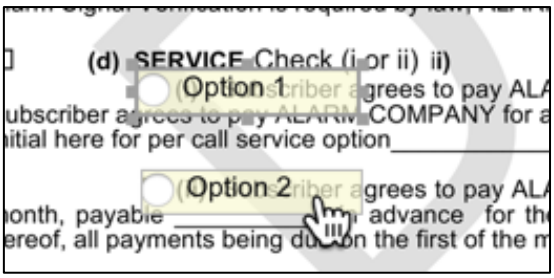
7. Adjust the **Field Name** and **Unique Name**. These fields should be labeled so they are easy to identify when sending the form. (This is optional)



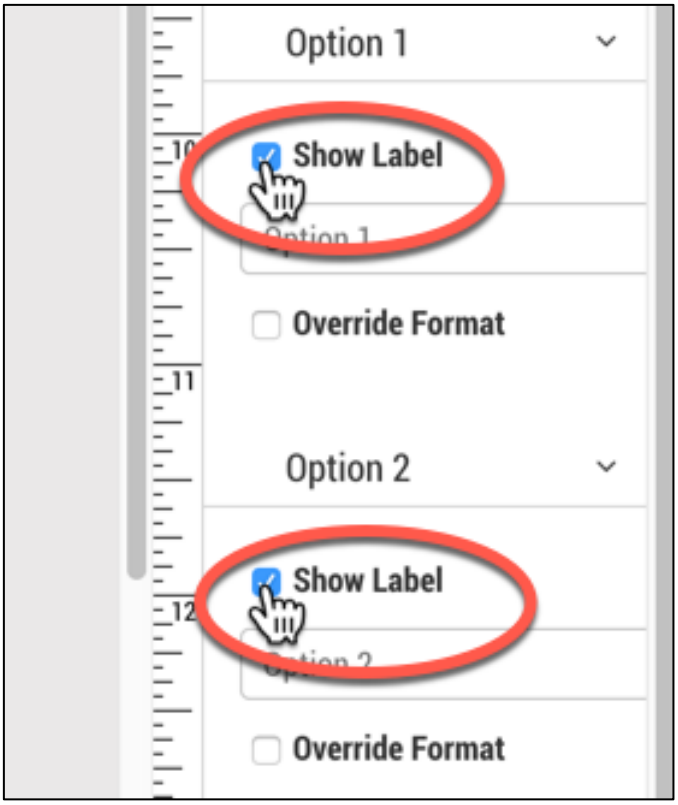
8. Select **Update.**



9. Select the field on the template.

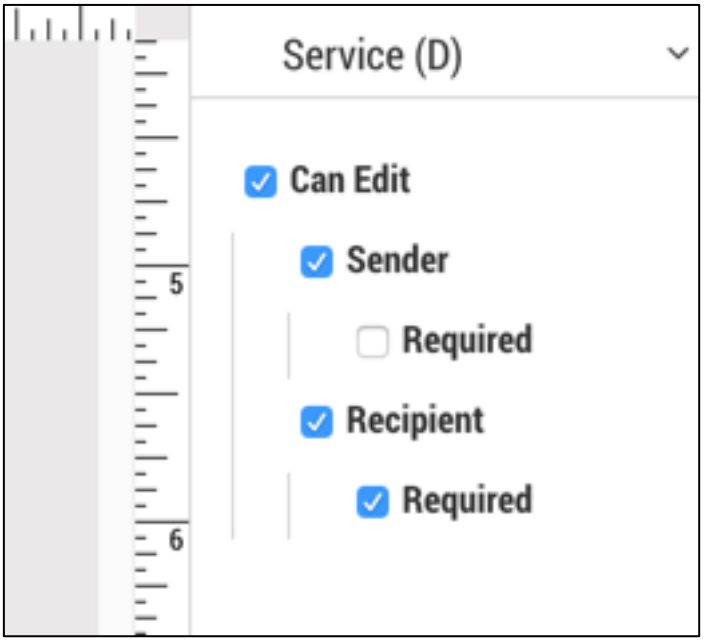


10. Navigate to the right side bar and uncheck **Show Label** to hide the label.

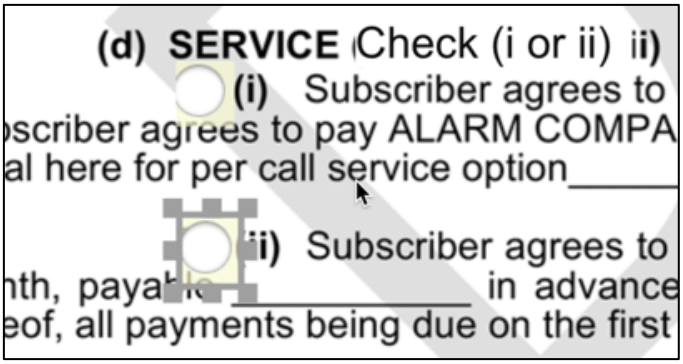


11. Navigate to the top of the panel on the right and select whom can edit the field and if the field is required.

    Note: This will can be set for most Form Data fields.

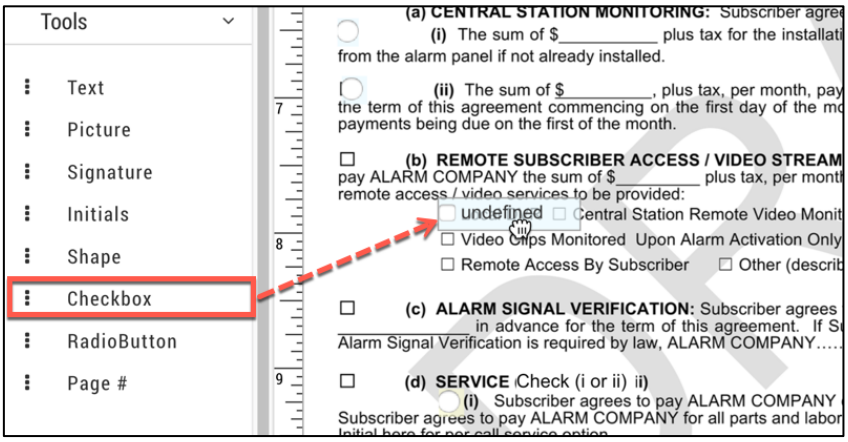


12. Resize the fields as necessary.

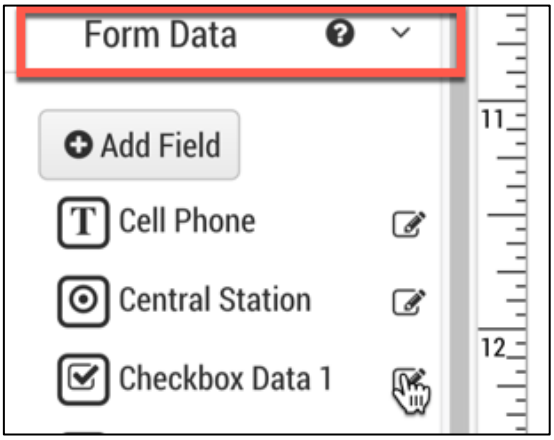


Adding Check Boxes from Tools

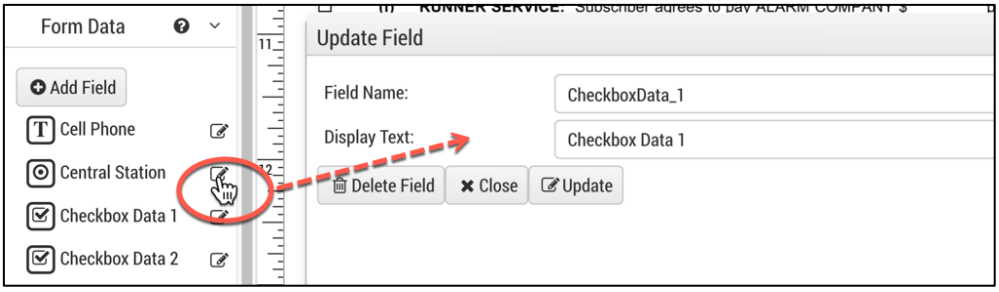
1. Navigate to **Tools**.
2. Click and drag **Checkbox** onto the form.



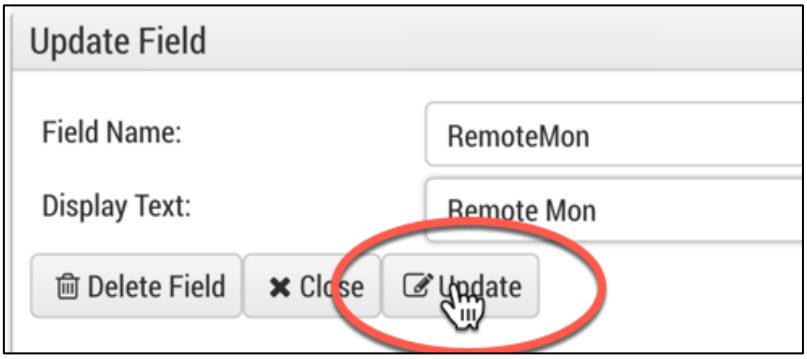
3. Navigate to **Form Data.**



4. Select **Edit**.



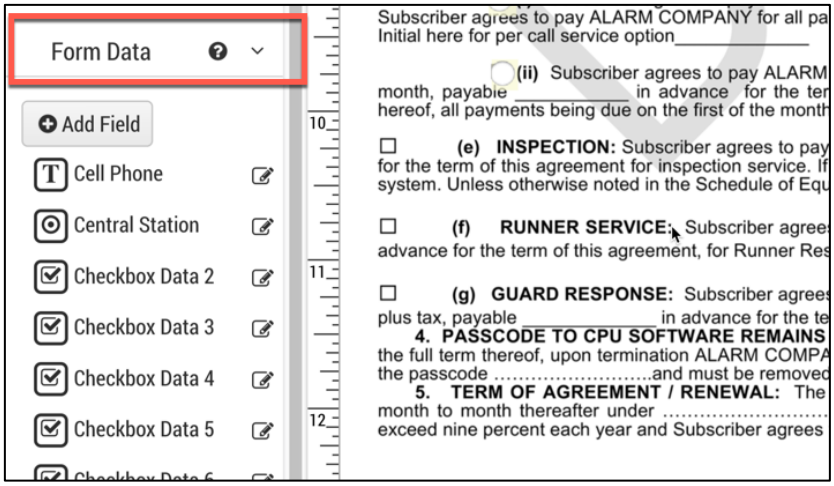
5. Adjust the **Field Name** and **Unique Name**. These fields should be labeled so they are easy to identify when sending the form. (This is optional)
6. Select **Update.**



7. Select the field and navigate to the right side bar.
8. Uncheck Show Label to hide the label

Form Data

Form Data are electronic fields that are form specific for the template you are working with. The fields are listed below with specifics on how to add on a form. When adding a field, you will select if the field can be edited, whom can edit and if it is required.

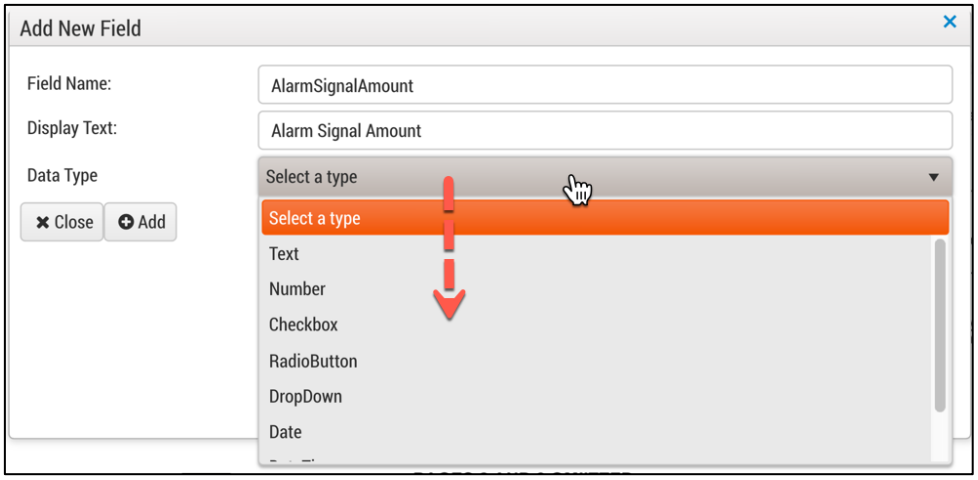


Adding a Form Data Field

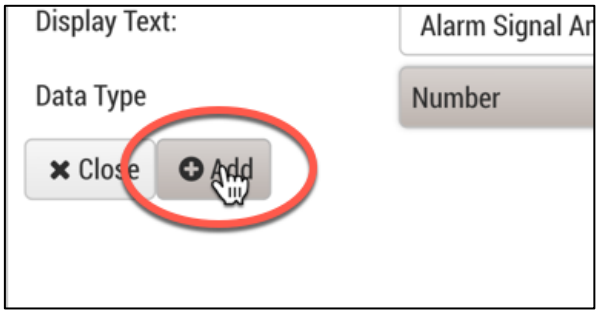
1. Select + Add Field.

2. Fill in the fields below:
   9. **Field Name:** Unique field name for the field, this should have no spaces. The field name for each data type should be unique.
   2. Note: For example, you may need three text fields for name, address and passcode and they need to be separate fields. You would add three form data text fields and they would all have separate form names.
   10. **Display Text:** This will appear when sending the form and recipients receiving.
   11. **Data Type:** Specific type of field you would like to create, see all of the data type options below.

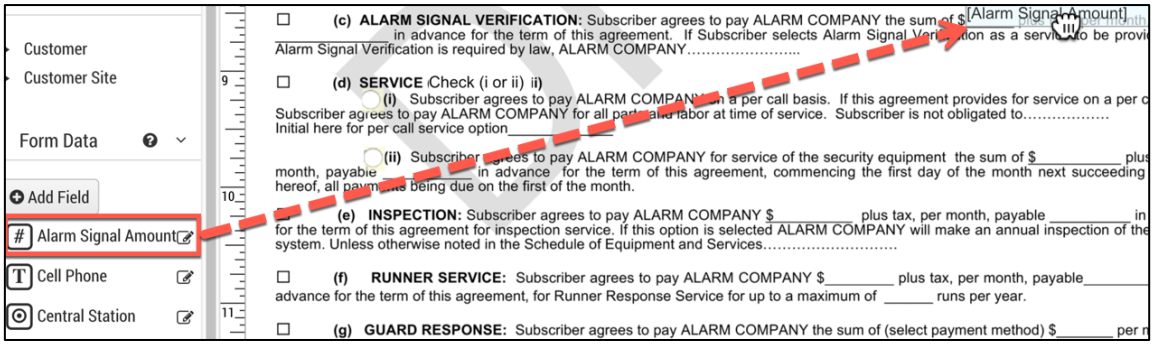
3. Click **Data Type** to select the type of field.



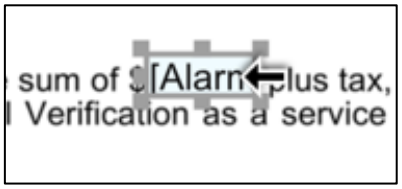
4. Select **+Add.**



5. Drag field onto template.



6. Resize the field to fit.



7. Select if the form is editable and whom can edit. See Edit of Fields for specifics.

Form Data - Data Types

Field Names for Form Data Must Be Unique! If for example you create a date field and use it at multiple locations on the form. The date entered will populate in every location. If the dates are unique you must create multiple form data date fields for each.

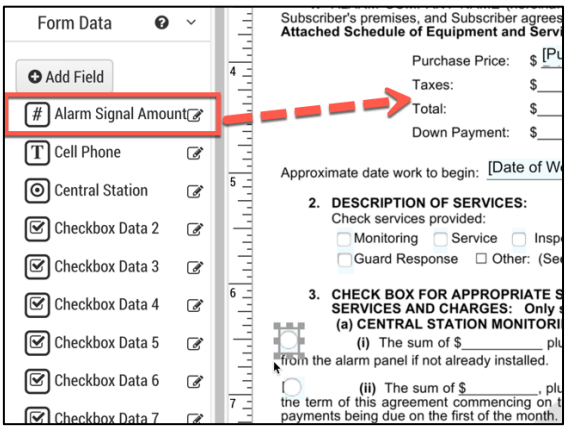
Below are the different types of fields:

- **Text:** Use this field to give your recipients or sender an electronic text field(s) to enter in text.
- **Number**: Use this field to give your recipients or sender an electronic number field to enter in a number. Only numbers are able to be entered into this field.
- **Checkbox**: Checkbox is an optional field and can't be set as required. Once dragged into the form, it will add the item as a form data field in which you may label.
- **Radio Button:** A radio button can be made a required field and can be grouped with multiple buttons. Once dragged into the form, it will add the item as a form data field in which you may label. The values should be unique and in order 1,2,3,4 etc.
- **Drop Down:** Use this field to give your recipients or sender a list of options they can select. The values should be unique and in order 1,2,3,4 etc.
- **Date**: Use this field to give your recipients or sender an electronic date field to enter in a date.
- **Date Time:** Use this field to give your recipients or sender an electronic date field to enter in a date and autofill the time.

Edit of Fields

When adding a **Form Data** field or **Shared Data** you will need to determine who can edit the field and if it is required.

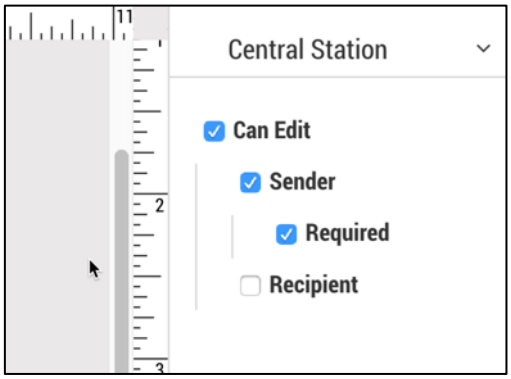
1. Drag in a field.



2. Navigate to the top right bar.

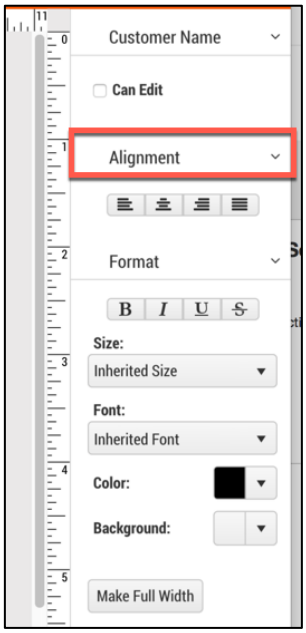
3. Select Can edit and follow the rules below.
    - **Can Edit:** The field can be edited.

- **Sender**: The sender can edit the field but is not required.
- **Required:** The sender can edit the field and is required or can't deliver the form.
- **Recipient**: The recipient can edit the field but is not required.
- **Required**: The recipient can edit the field and is required or can't complete the form.



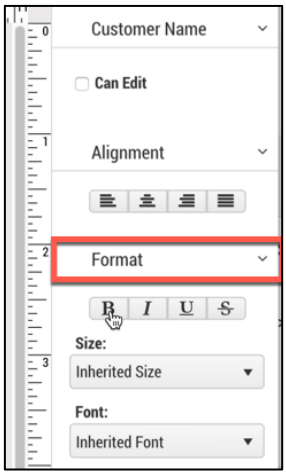
Alignment

Select the field on the template and navigate to the right-side bar. Select the alignment of the data entered into the selected field.



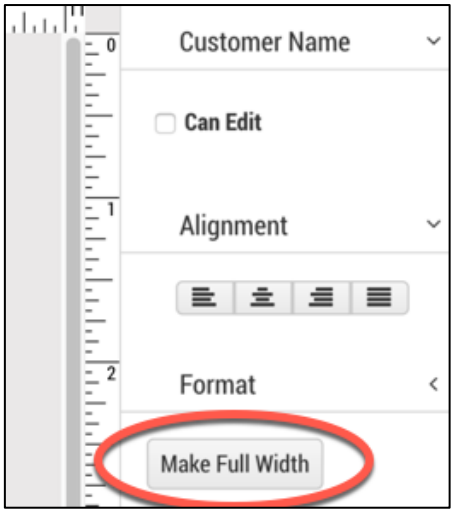
Format

Select the field on the template and navigate to the right-side bar. Format the selected field by selecting a font, size, font color, and background color.



Make Full Width

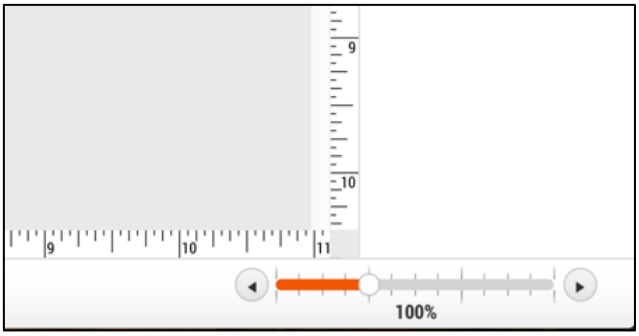
Select the field on the template and navigate to the right-side bar. When this button is clicked, the selected field will scale across the template.



Zoom

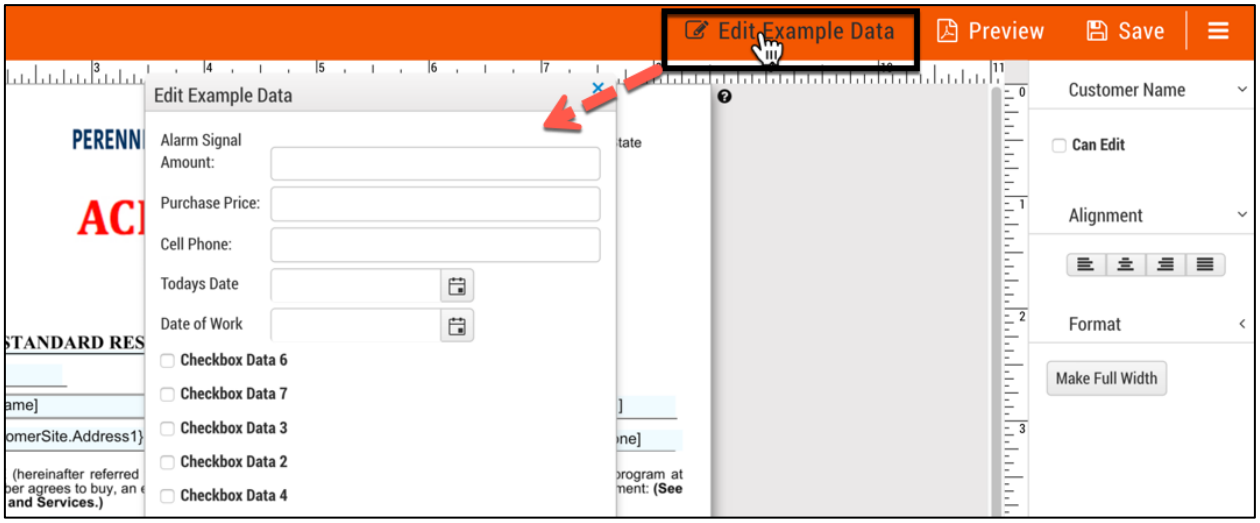
Allows the ability to zoom in and out of the form. This can come in handy when you have multiple fields grouped together and need to control spacing. The zoom is located in the bottom right of the template.
To Zoom in and out follow the instructions below:

1. Click the > button to zoom in > button to zoom out.



Edit Example Data

After **Form Data** fields are entered, fill in the fields with test data to view how it will appear on the finished template. After you enter in data for your fields you will need to follow instructions on how to Preview you form below.

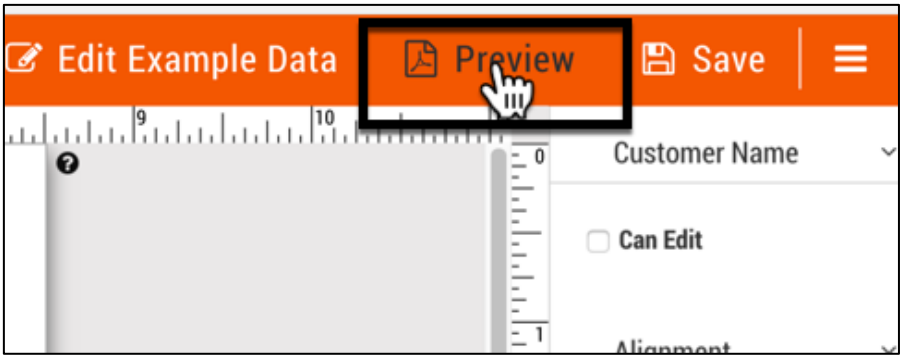


Preview

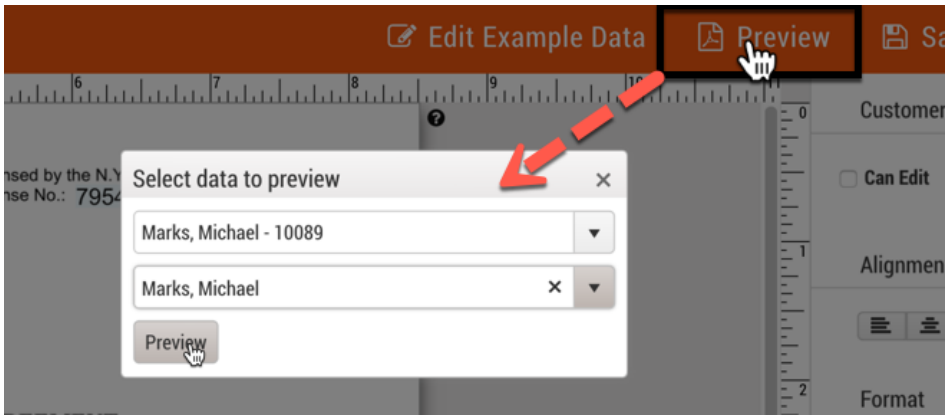
Click Preview to view a preview of what the template will look like when delivering. If example data is entered or **Shared Data** fields, this will populate the form so you can make sure alignment, size, font, placement, etc. are correct in the template.

This is great to also use the WYSIWIG editor to check in on the progression of creating your template.

1. Select Preview.



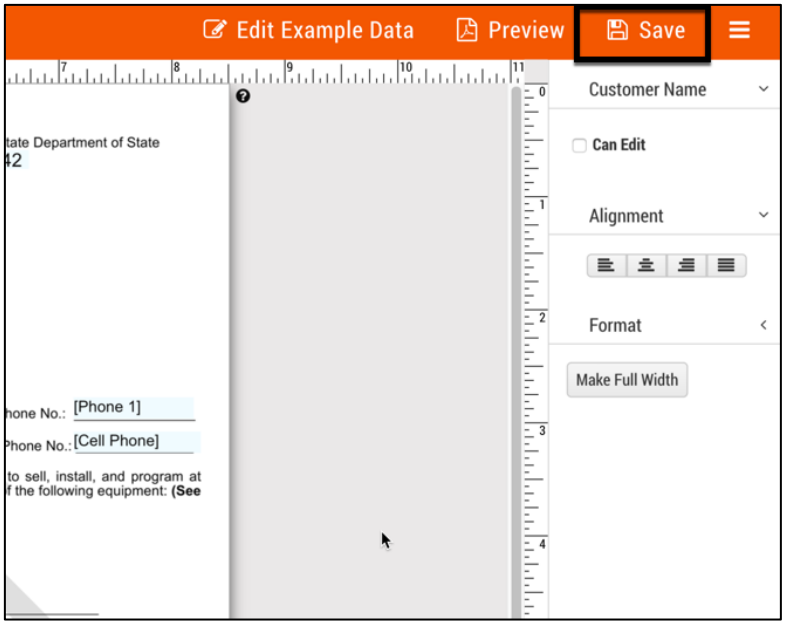
2. If the integration is activated select the customer, site or system



3. A PDF will download with what the finished template will look like.

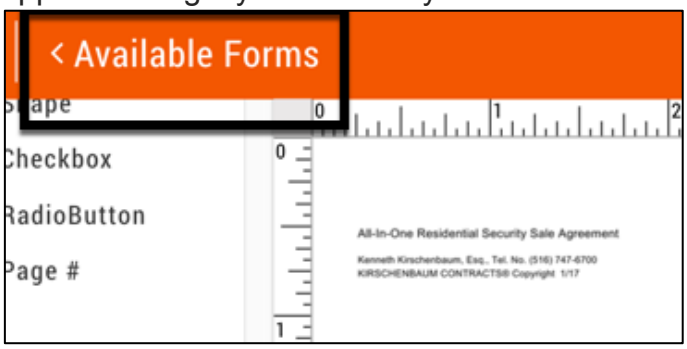
Save

Select Save periodically to save your work. It is wise to save this every 10 to 15 minutes to minimize the chance of disruption.



Available Forms

Click to go back to your **Templates** library. If you did not save a dialogue box will appear asking if you are sure you would like to leave without saving.

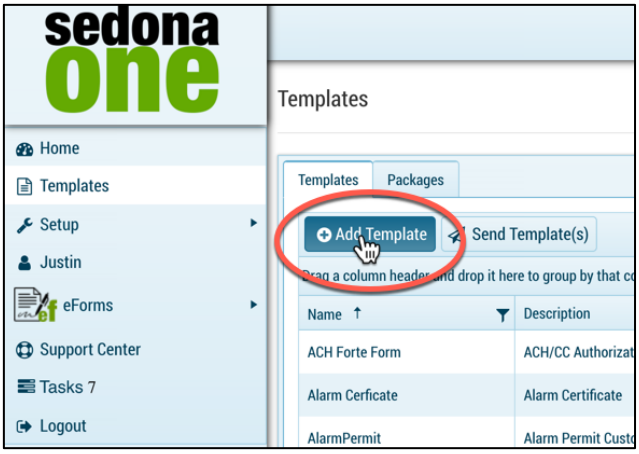


SedonaOffice Integration

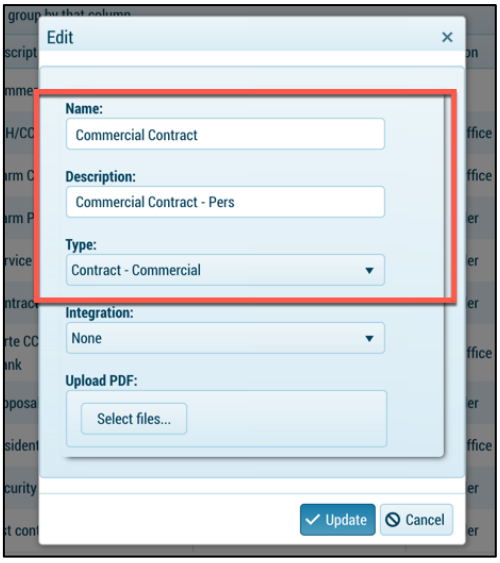
SedonaOffice integration is only available if the SedonaAPI was purchased and turned on. The integration allows for SedonaOffice fields to merge directly onto a template. After a template is completed the PDF document can be pushed to SedonaDocs.

Adding Template with Integration

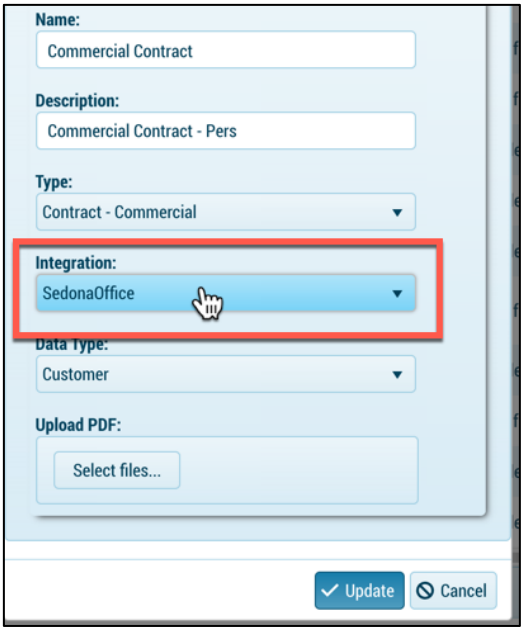
1. Navigate to **Templates.**
2. Select + Add Templates.



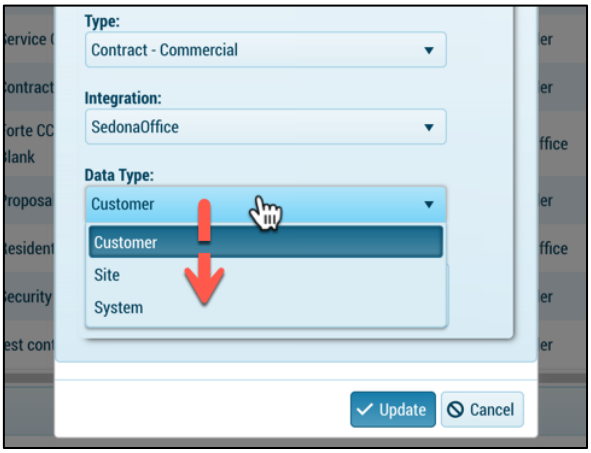
3. Enter in the name, description and type.



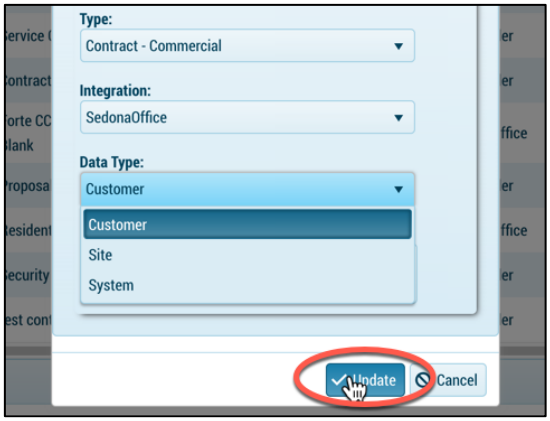
4. Select Integration: SedonaOffice



5. Data Type: Is this linked at the customer, site or system level.
   - **Customer:** Provides shared SedonaOffice fields from the customer level. Documents pushed back to the customer level.
   - **Site:** Provides shared SedonaOffice fields from the customer and site level. Documents pushed back to site level.
   - **System:** Provides shared SedonaOffice fields from the customer, site and system level. Documents pushed back to system level



6. Select **Update.**



Shared Data – Merging SedonaOffice Fields

Shared data is available only if the SedonaAPI was purchased and turned on. The fields that are available for the template are based on the data type selected when adding the template.

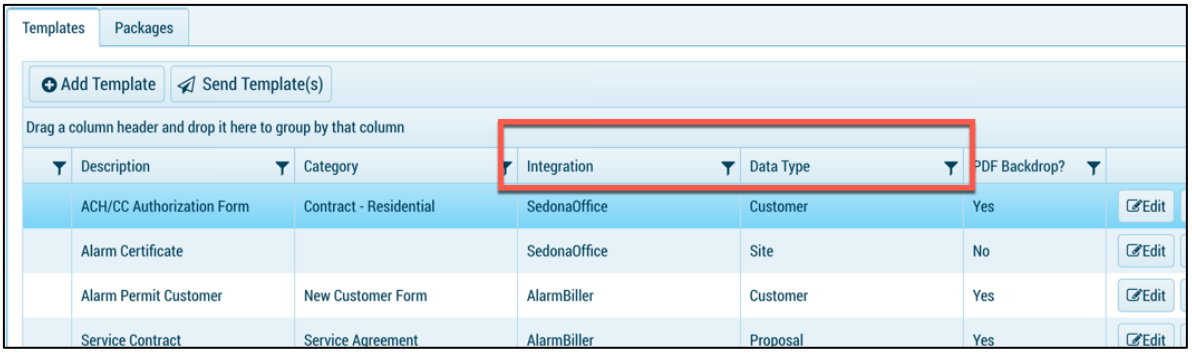
- **Customer:** List of fields available at the customer level in SedonaOffice
- **Site**: List of fields available at the site level in SedonaOffice
- **System**: List of fields available at the system level in SedonaOffice

Adding Shared Data on a Form

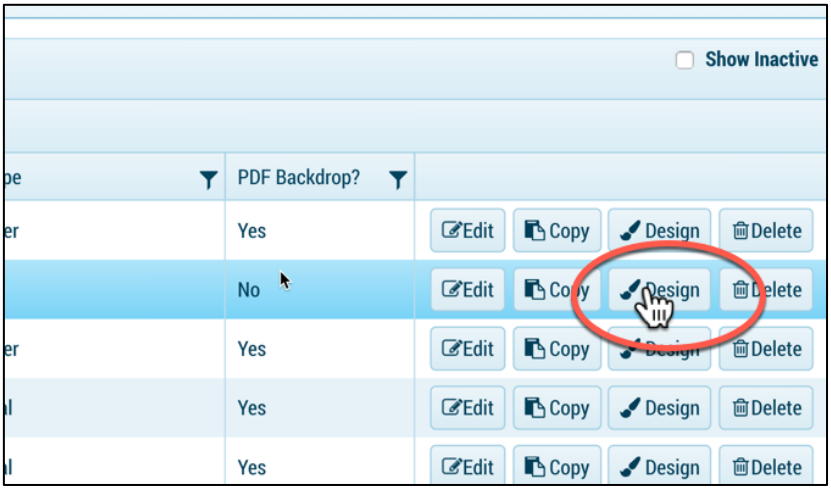
1. Navigate to **Templates.**

2. Navigate to an integrated form.

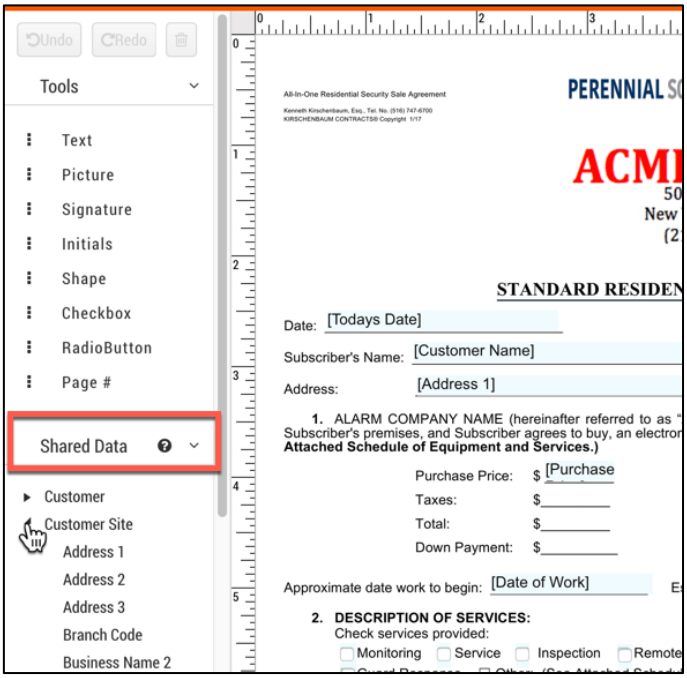
Note: Integration must equal SedonaOffice and Data Type must equal customer, site or system.



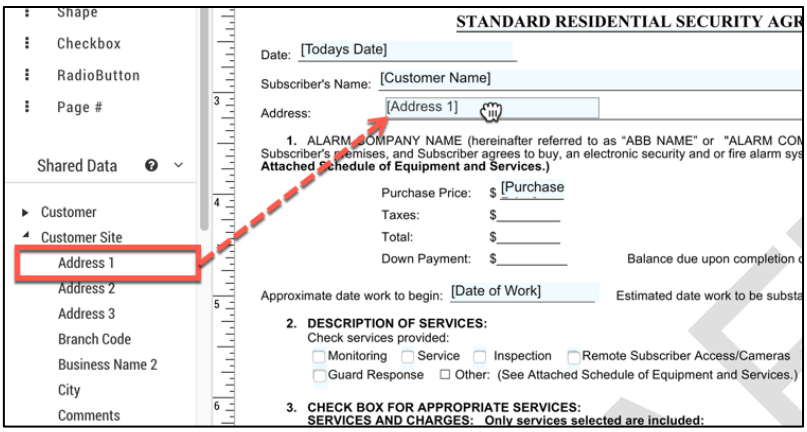
3. Select **Design.**



4. Click the drop down are on customer, site or system.

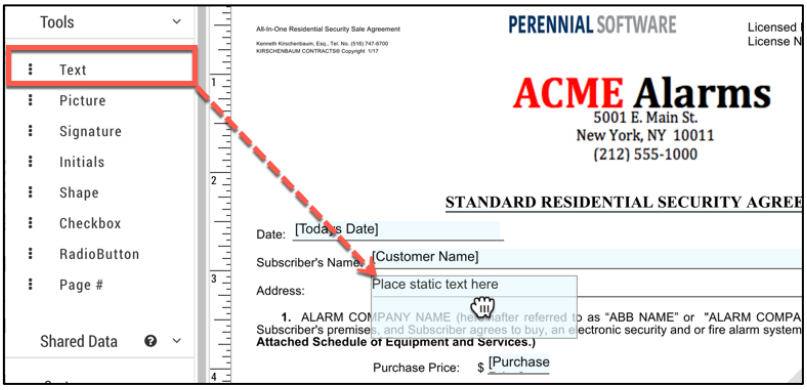


5. Click and drag the selected field onto the form.

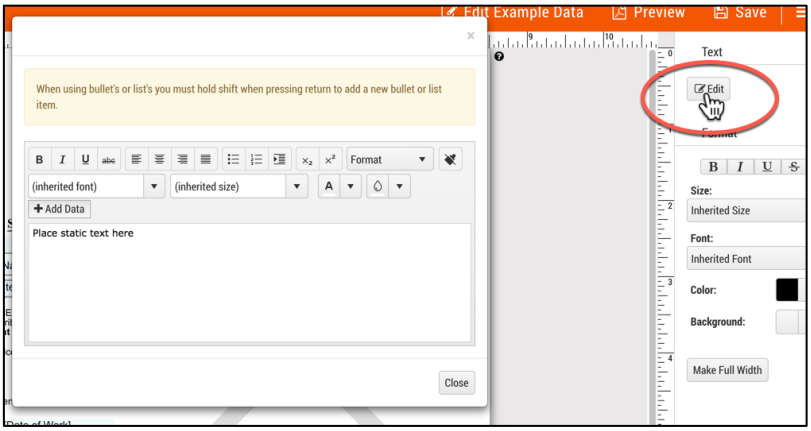


Shared Data in a Text Box

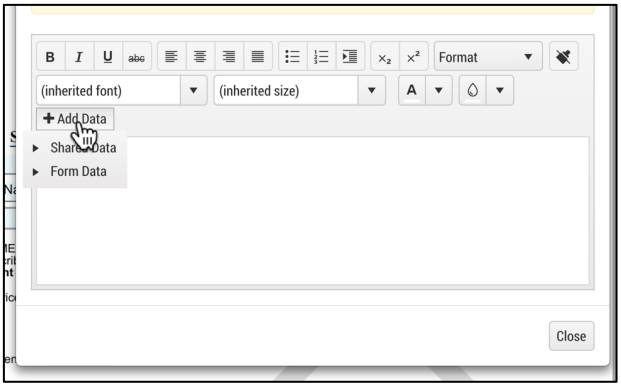
3. Drag a **Text Box** onto the form.



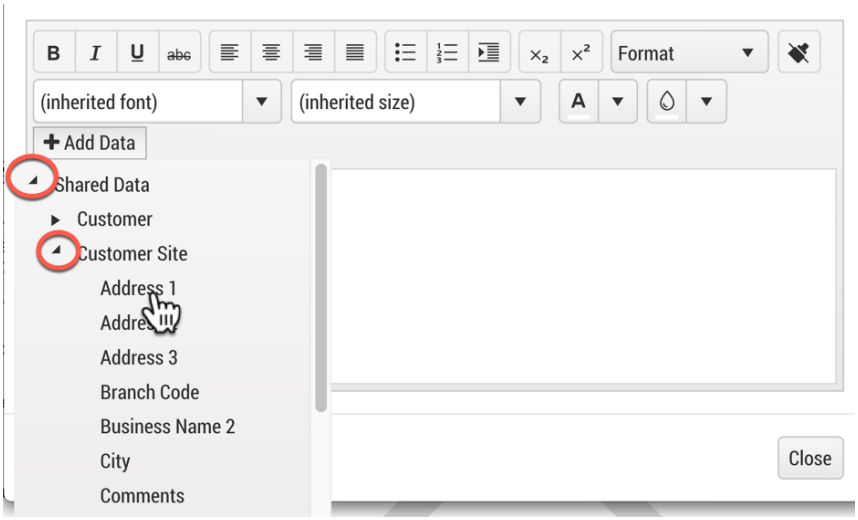
4. Select **Edit** in the top right .



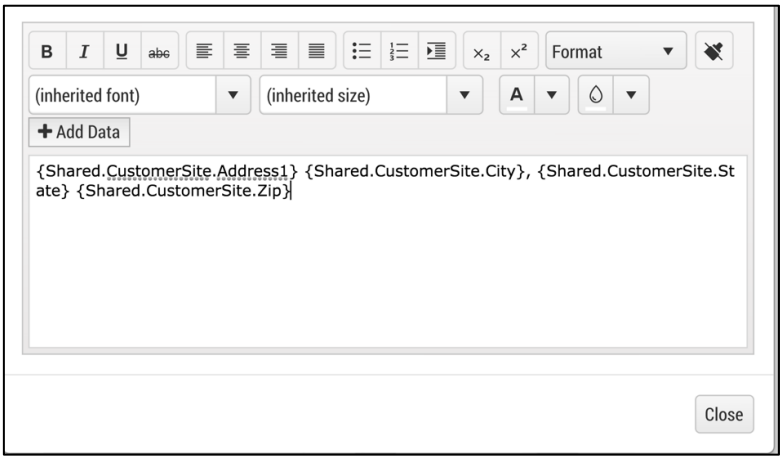
5. Select **+ Add Data**.



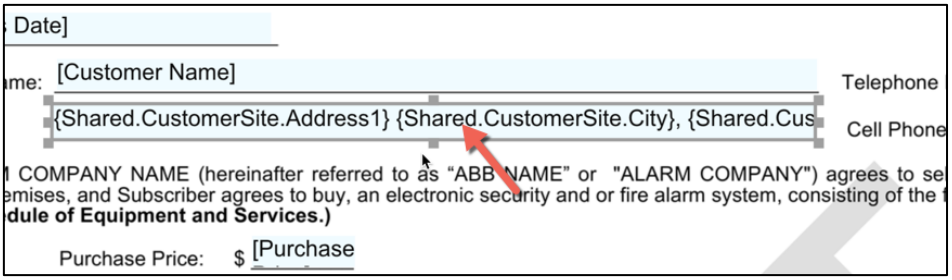
6. Select drop down next to shared data and click on the filed you would like to add.



7. Repeat process until you have added all the field and format the fields.



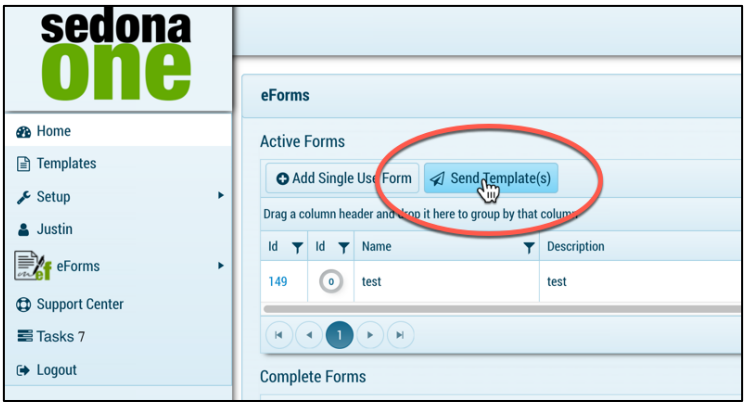
8. Select **Close**.



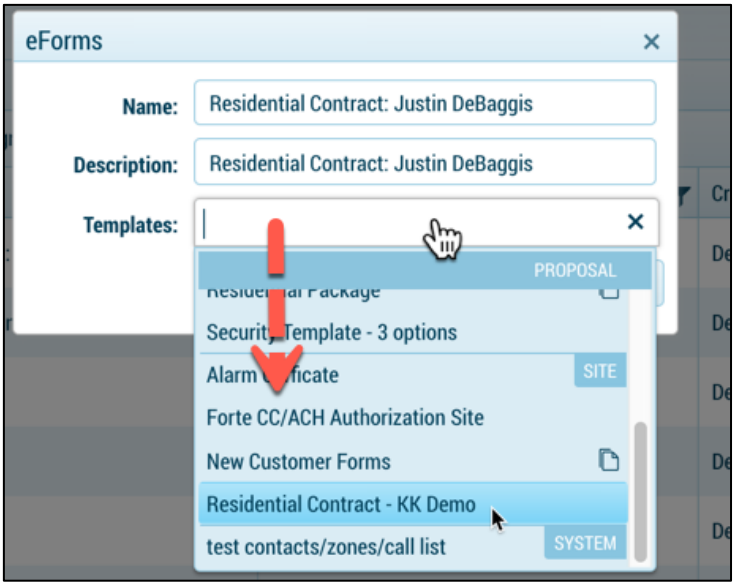
Sending Integrated templates

When sending a template with an integration with SedonaOffice and a data type selected you will have to pick a customer, site or system before you are able to deliver the form. If you have a form with data type of site you will need to select a customer & site before sending. If you have a contract for new clients for example and the customer will not be in the database yet, make sure you DO NOT integrate and select a data type. In this example leave the integration set as none.

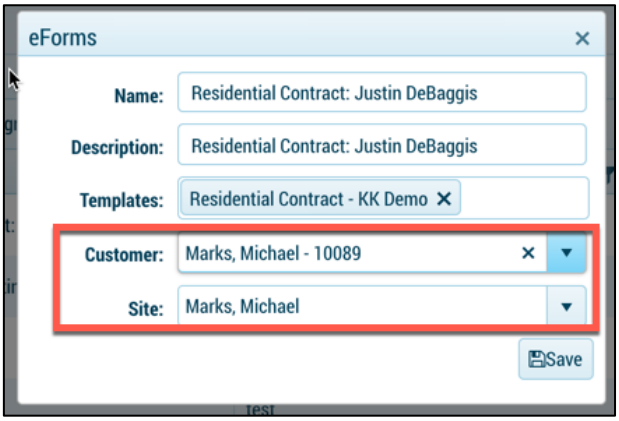
1. Select **Send Template(s).**



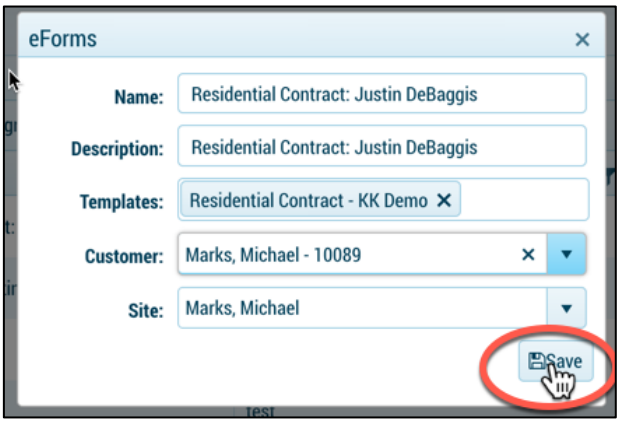
2. Fill in **Name**, **Description** and select the drop down to select the template.



3. Select the customer, site and system (dependent on the level of integration for the template).



4. Select **Save.**



SedonaDocs Integration

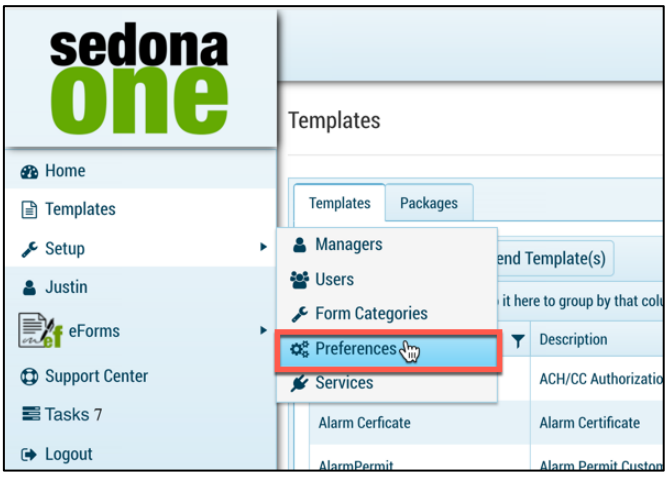
**SedonaDocs is Required*

When a form is completed and the template is integrated with SedonaOffice at the customer, site or system level the completed PDF will automatically save in documents based on the customer that completed. You can have the application automatically move it to SedonaDocs at the customer, site or system level. This is an option in setup, an if this is not checked off in setup you may manually push it.

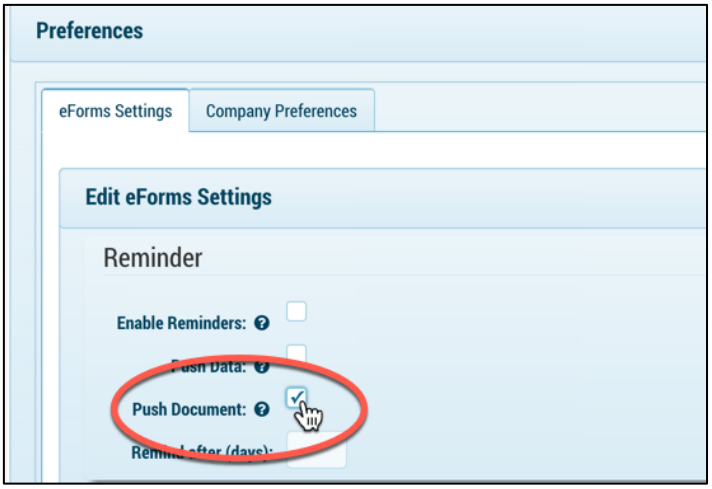
Auto push SedonaDocs

1. Navigate to **Setup.**

2. Select **Preferences**.



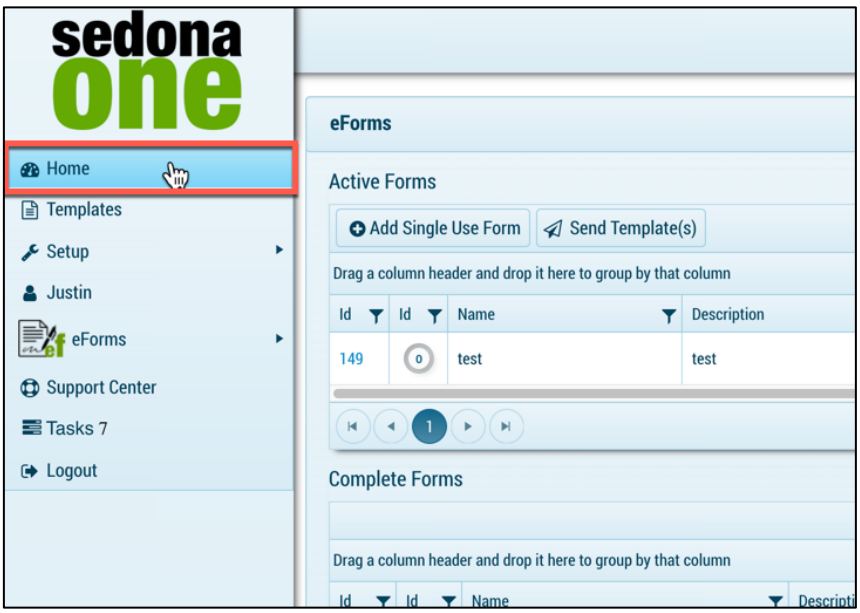
3. Check **Push Document**.



4. When all recipients have completed the resulting PDF will save in SedonaDocs at the customer, site or system level (dependent upon the data type for the template).

Manual Push to SedonaDocs

1. Navigate to the **Home Screen.**

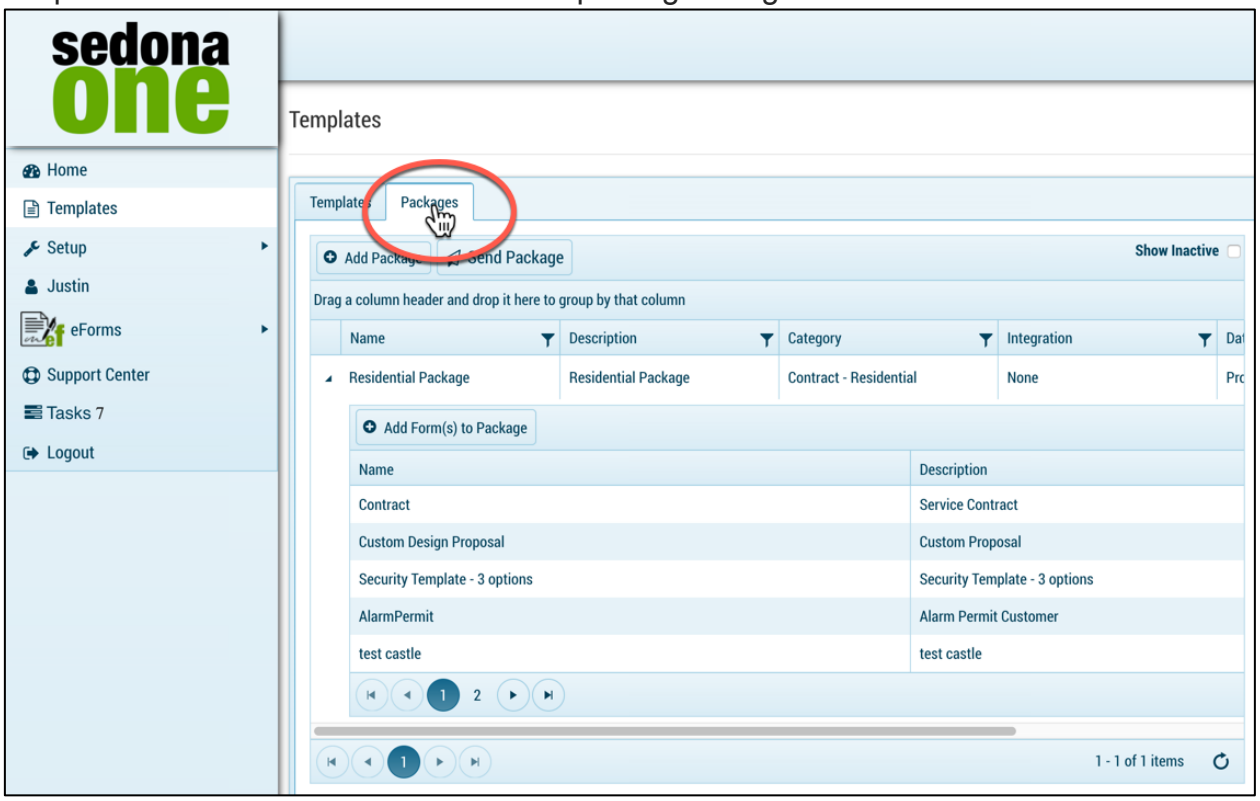


2. Locate the form under **Complete Form.**
3. To the far right of the document click the icon shown below to push the document to SedonaDocs at the customer, site or system level (dependent upon the data type for the template).

Note: If the document has already been pushed the icon for the completed eForm will be greyed out.

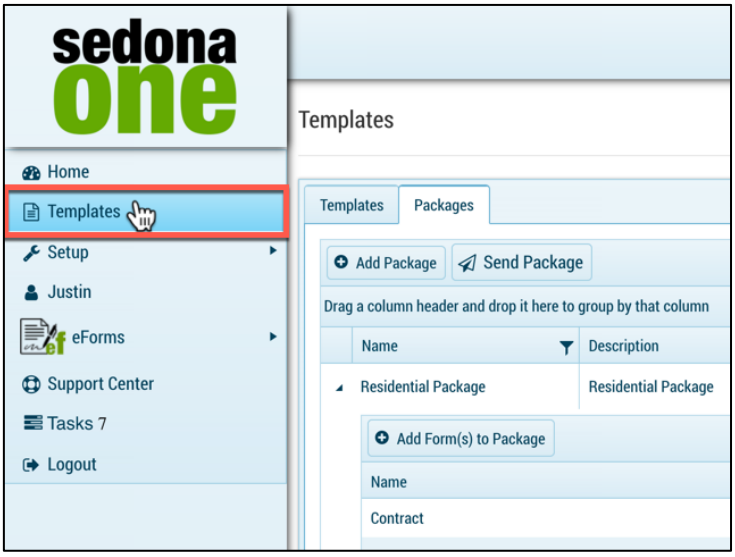
Packages

Packages are a group of templates from the templates library. When delivered the templates will be delivered in one email “packaged” together.

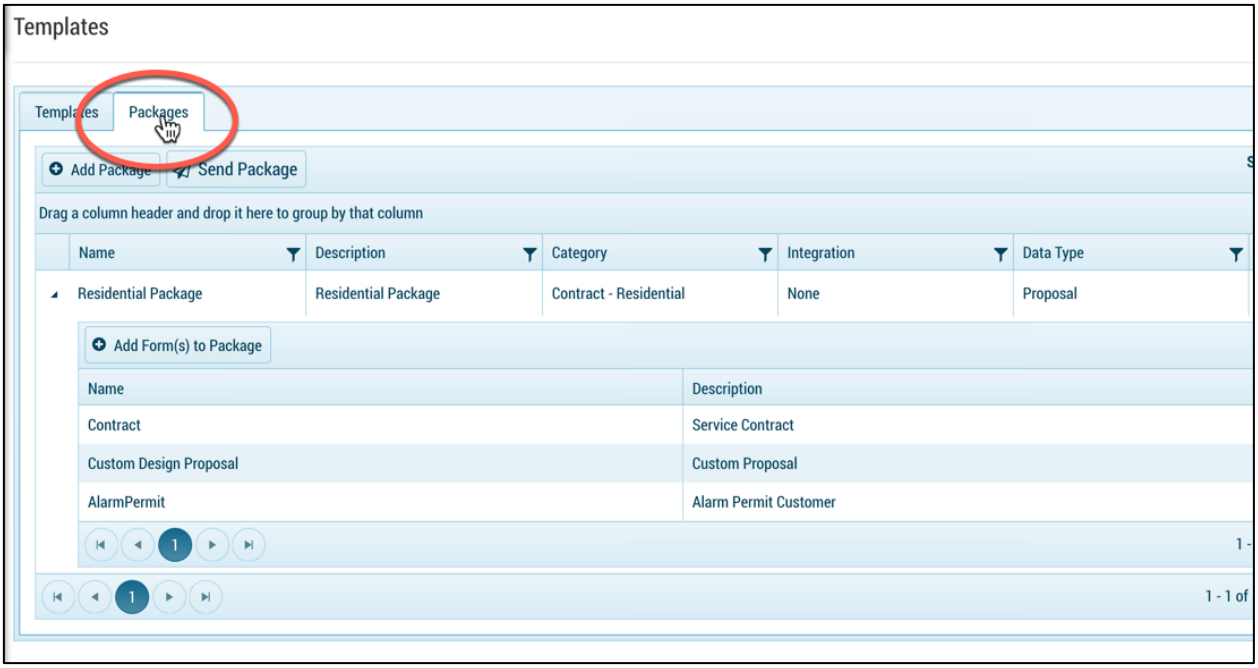


Creating Packages

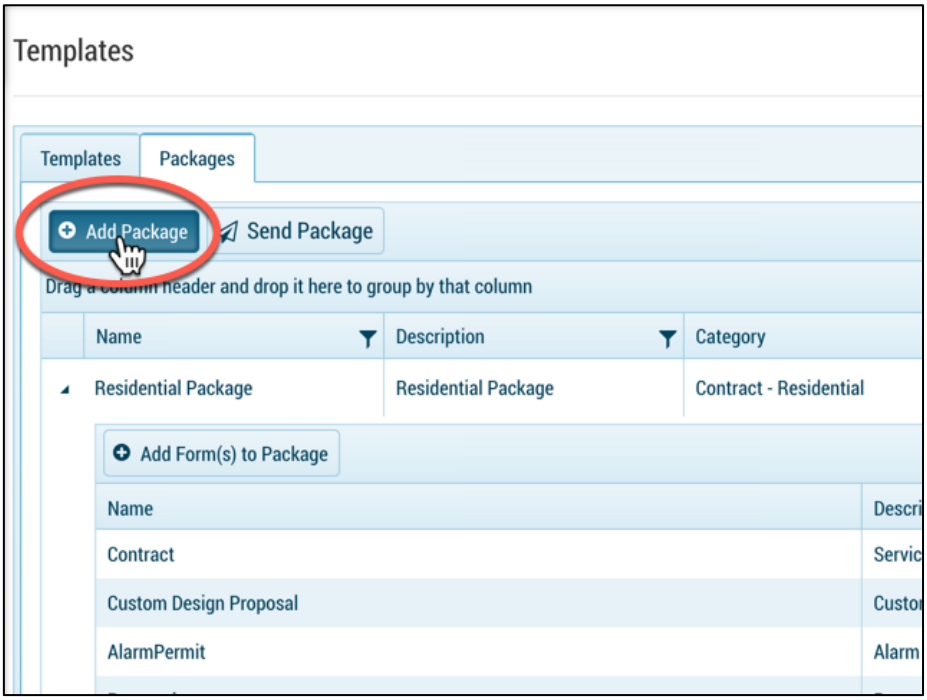
1. Navigate to **Templates.**



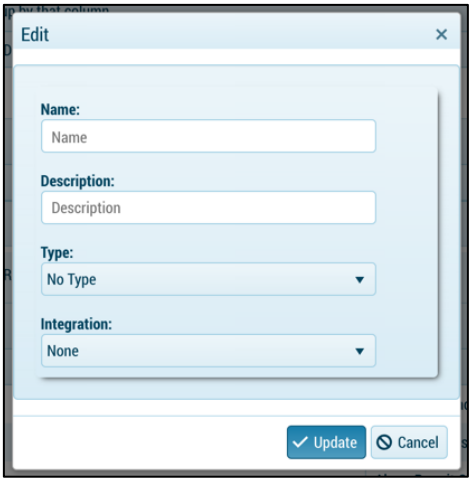
2. Select the **Packages** tab.



3. Select **+ Add Package.**

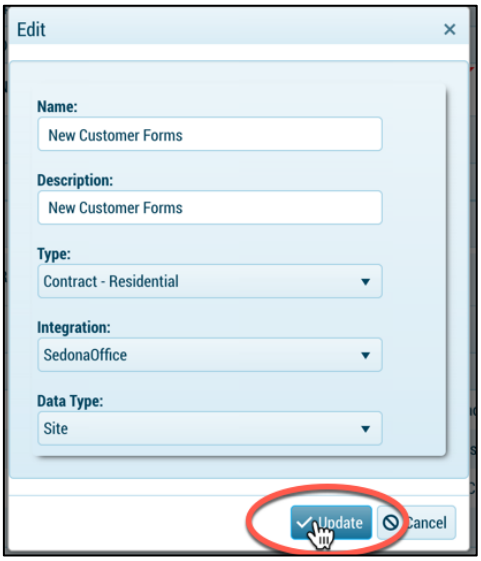


4. Fill in the required fields.

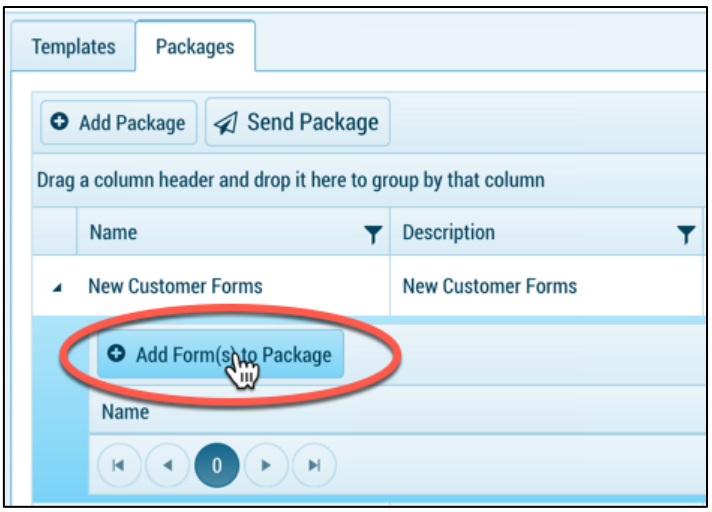


- **Name:** Name the user provided for the template e.g. All-in-One Contract. When selecting a template to send the dropdown list will show the name of the template.
- **Description:** Description the user provided for the template. This may be the same as the name or
- **Category**: Category the user assigned for the template. The categories are created in setup discussed in the setup section of this document.
- **Integration:** If the templates are integrated with SedonaOffice fields integration will read SedonaOffice. If no integration is active the field will read none. The integration allows templates to integrate with SedonaOffice fields based on the data type. (Integration is only available for customer whom have purchased the SedonaAPI)
- **Data Type**: Fields in SedonaOffice (customer, site, system) that the template may integrate with.

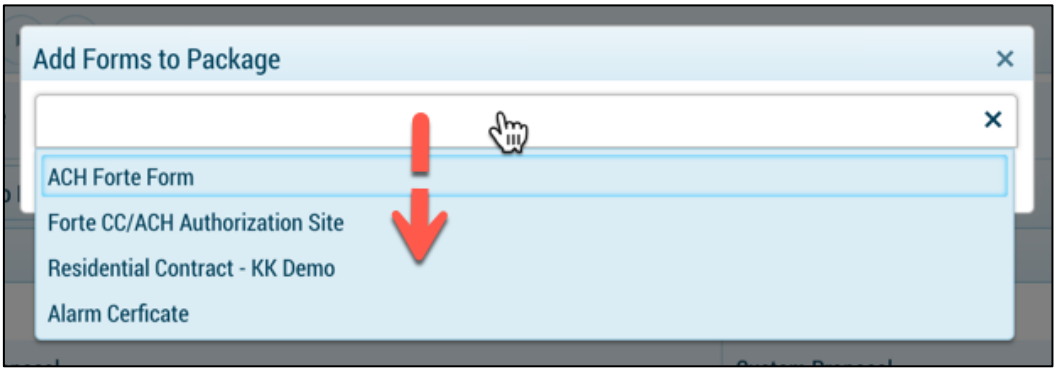
5. Select **Update.**



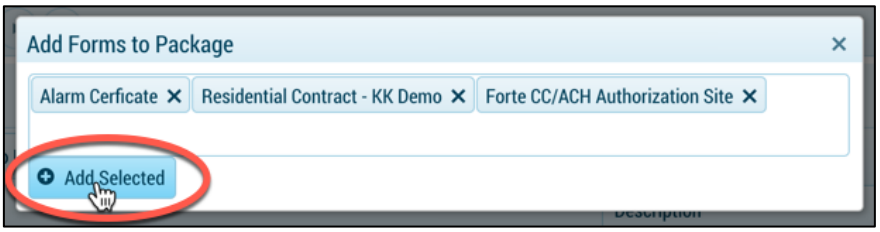
6. Select **+ Add Form(s**) to under the package.



7. Select for the drop-down and pick the from the list of templates that you would like to add to the package. You may add 1 or multiple templates.

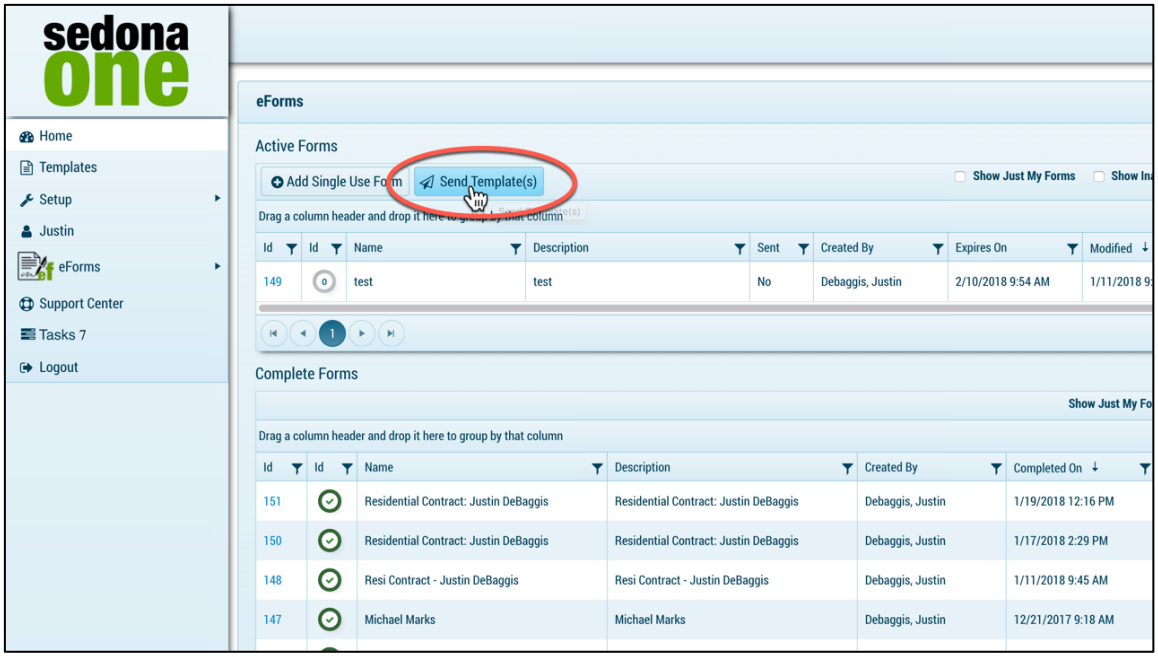


8. Select **+ Add Selected.**



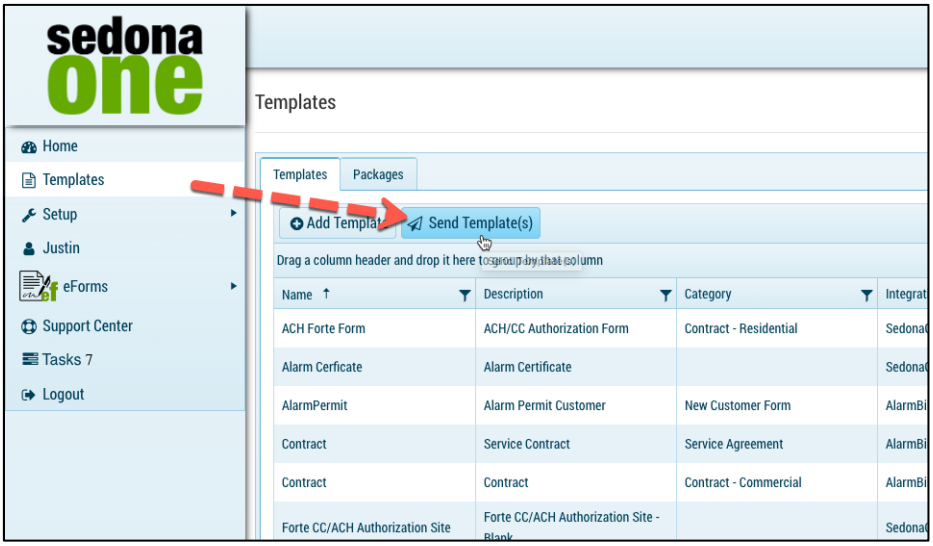
Sending Templates for Electronic Signing

A key feature in eForms is the ability to send the templates or single use forms for signing. This section provides step-by-step procedures for delivering documents. The steps to follow are listed below:

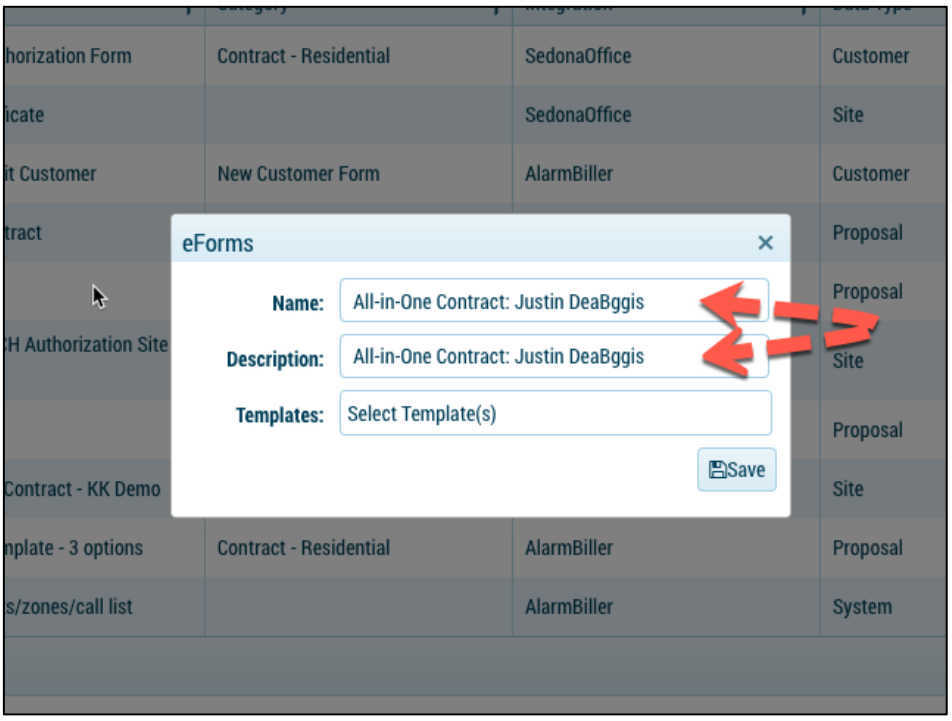


1. Navigate to **Home** or **Templates** tab.

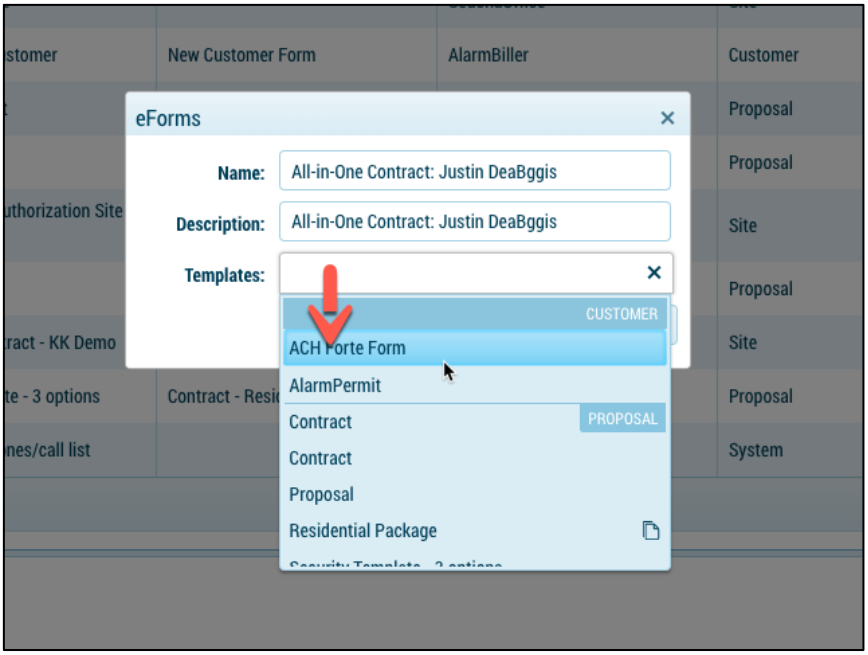
2. Select **Send Template**.



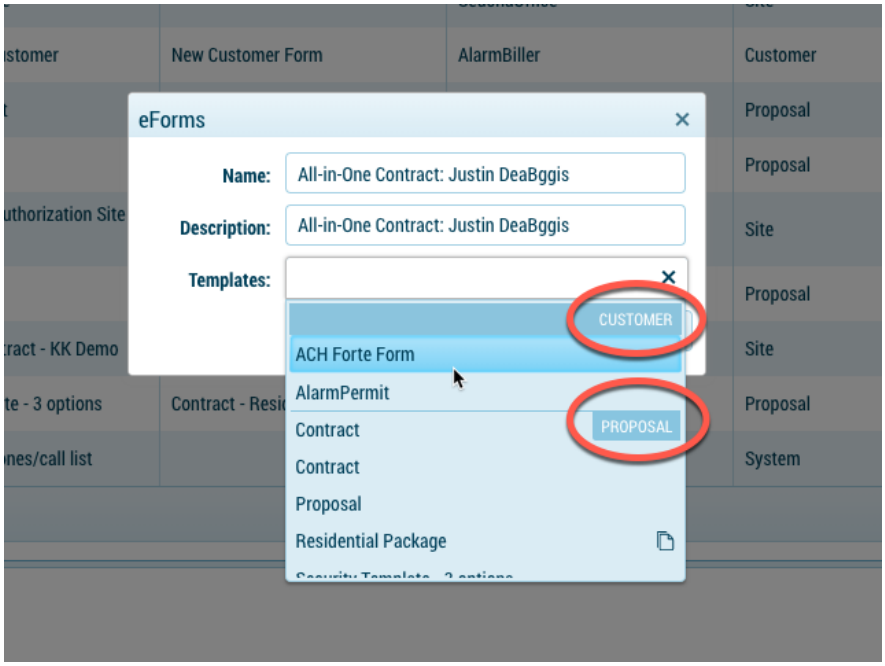
3. Enter in a **Name** & **Description.**



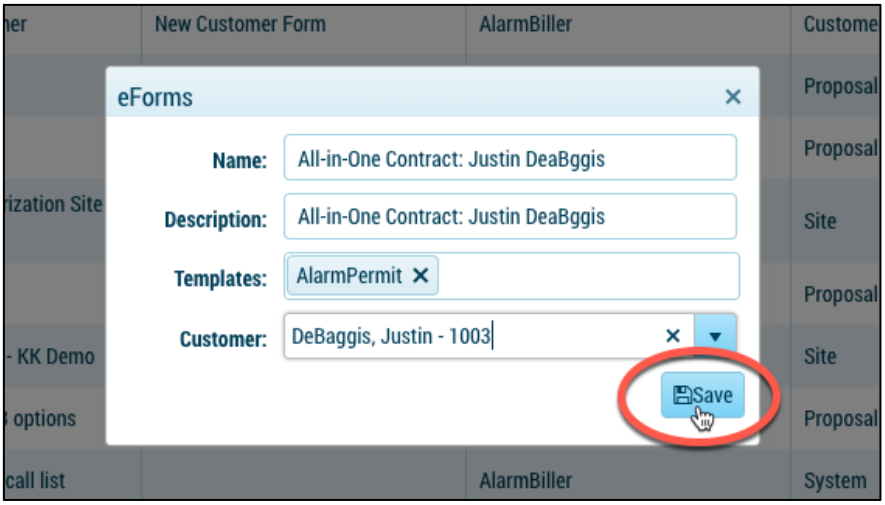
4. Pick a template by clicking in the white area next to **Templates**.



5. The level of integration will be listed in the top right.



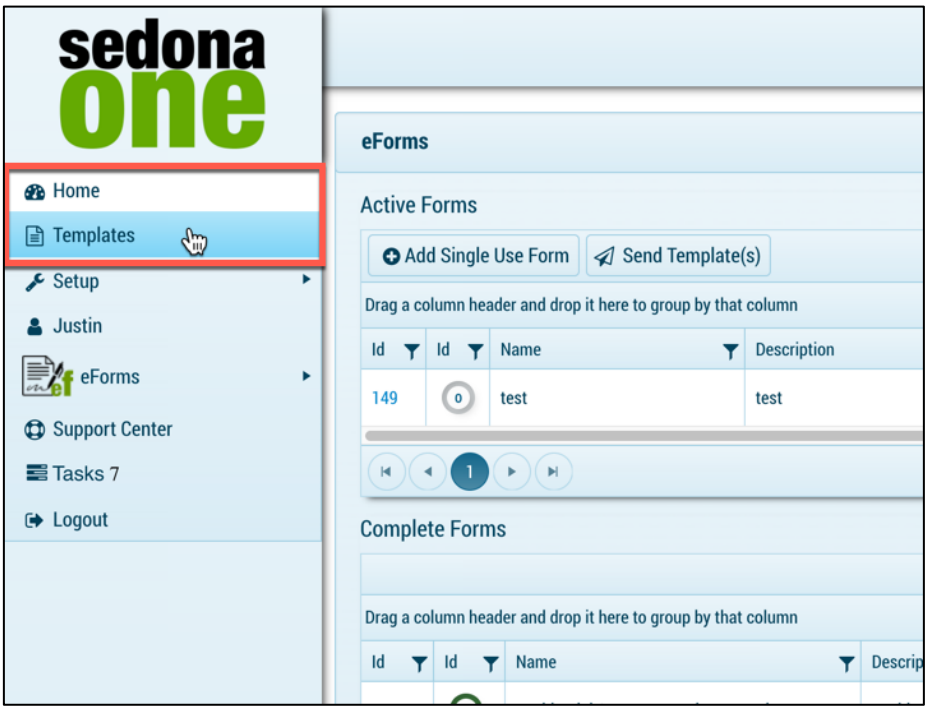
6. Select **Save.**



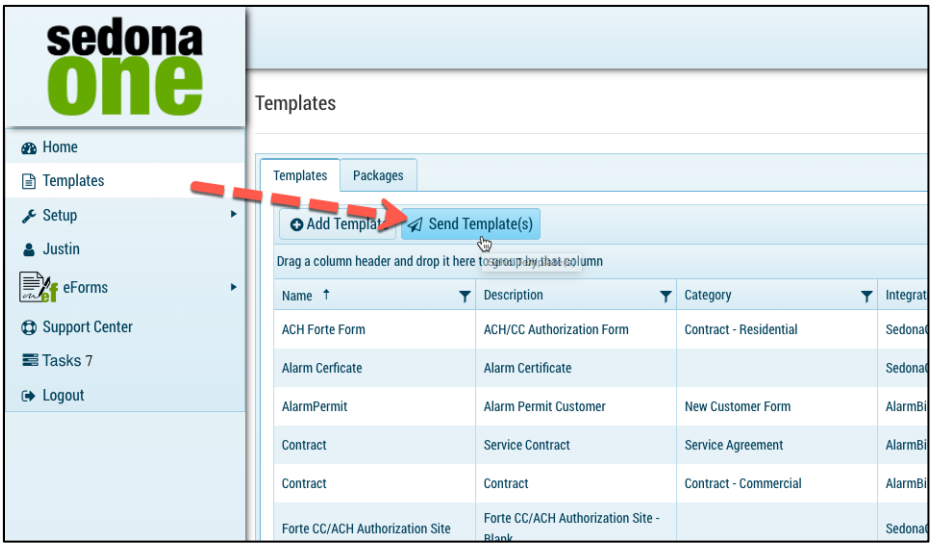
Note: If a form has no integration you will need to select Save. If a form with an integration is selected you will be prompted to select a customer, site or system.

Sending Packages

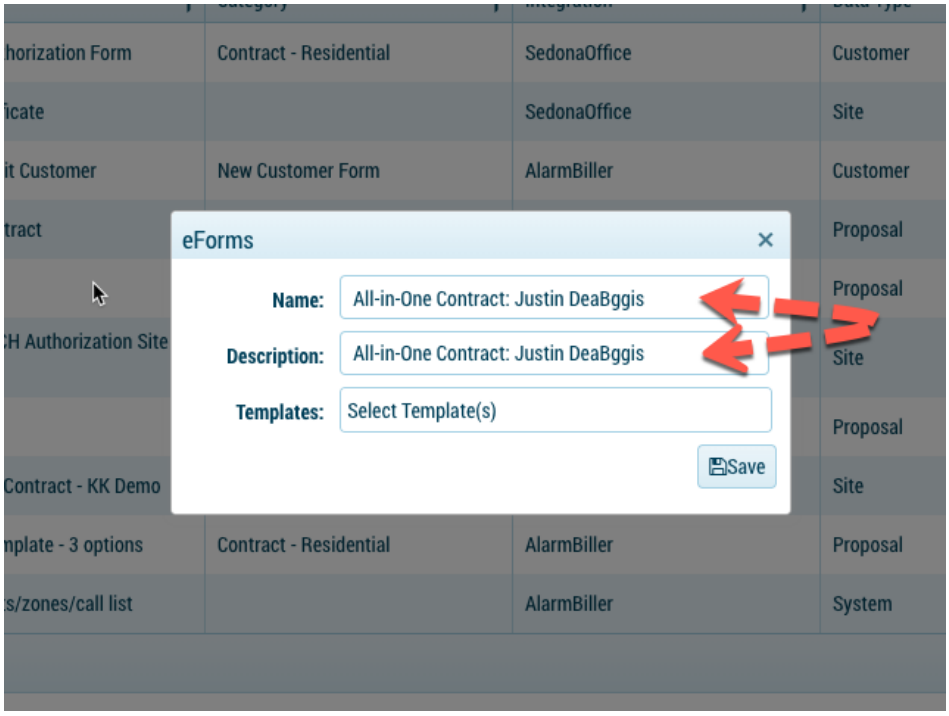
1. Navigate to **Home** or **Templates** tab.



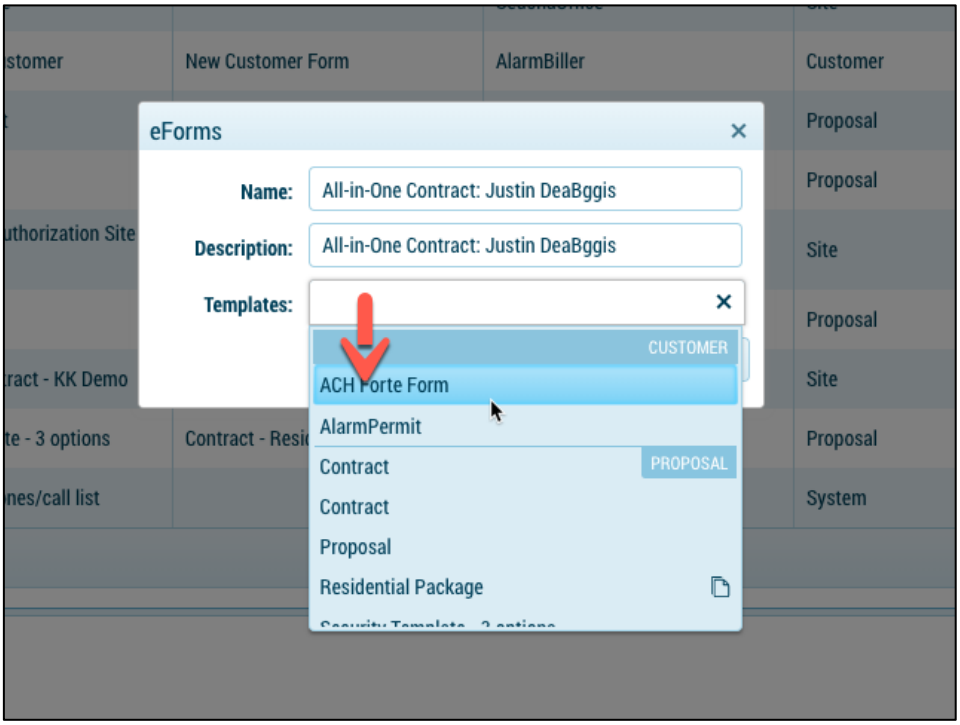
2. Select **Send Template(s).**



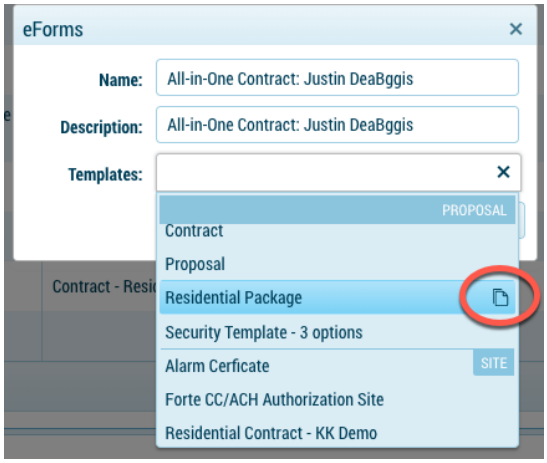
3. Enter in a **Name** & **Description.**



4. Pick a template by clicking in the white area next to **Templates.**

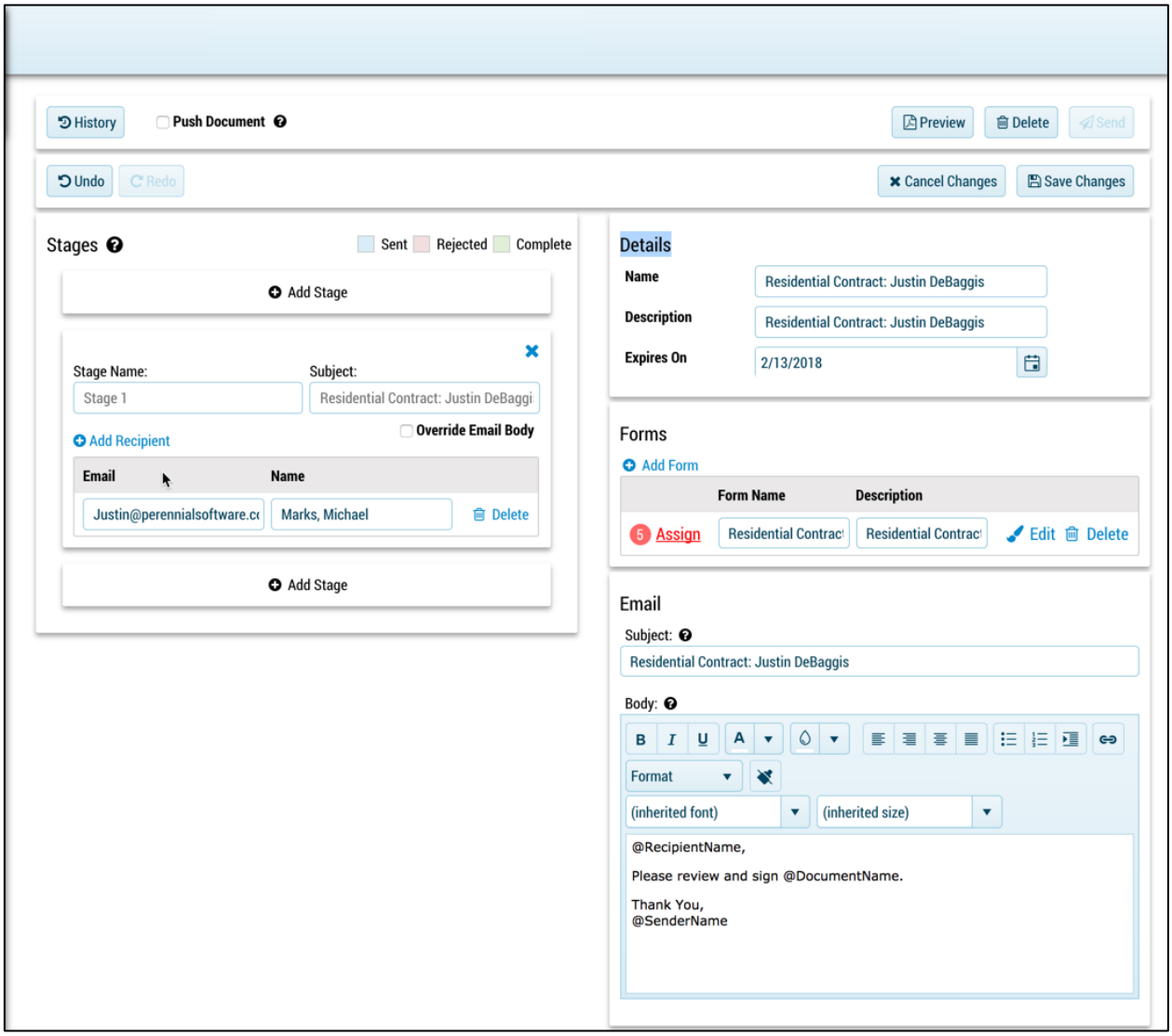


5. Select the template with the package icon.

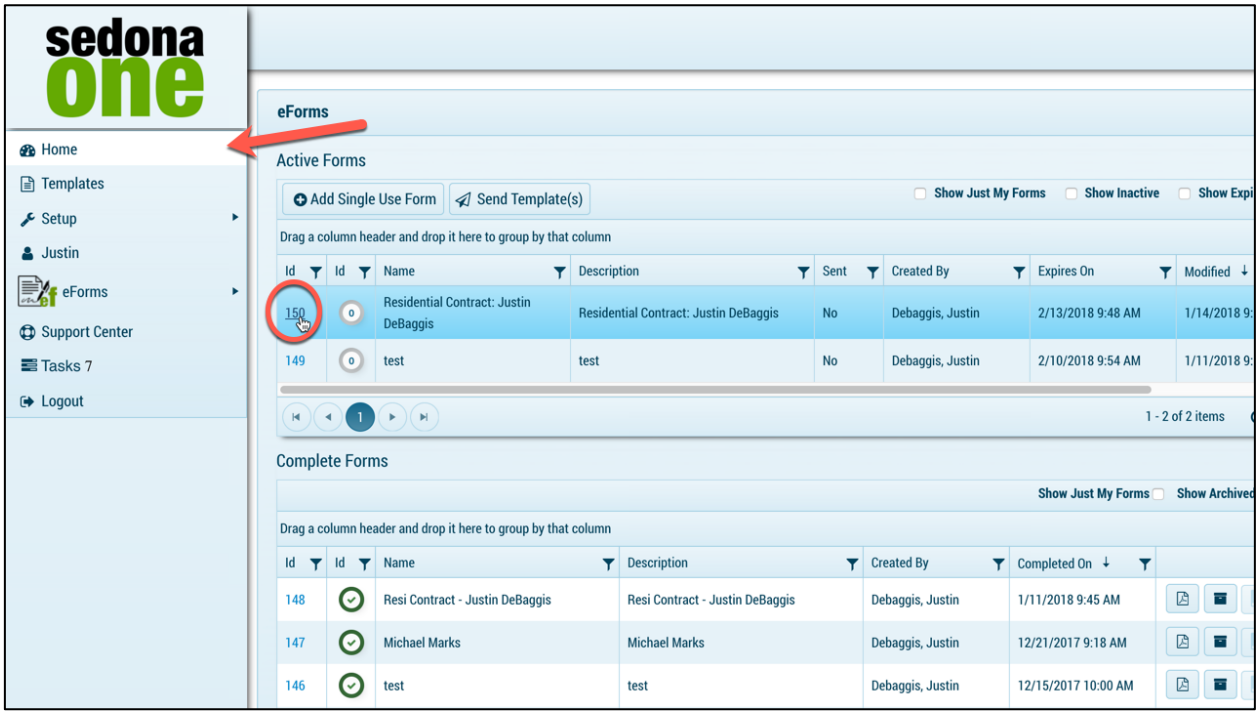


Note: You may also navigate to setup > templates > packages and select Send Package.

eForm Delivery Setup - Deliver System



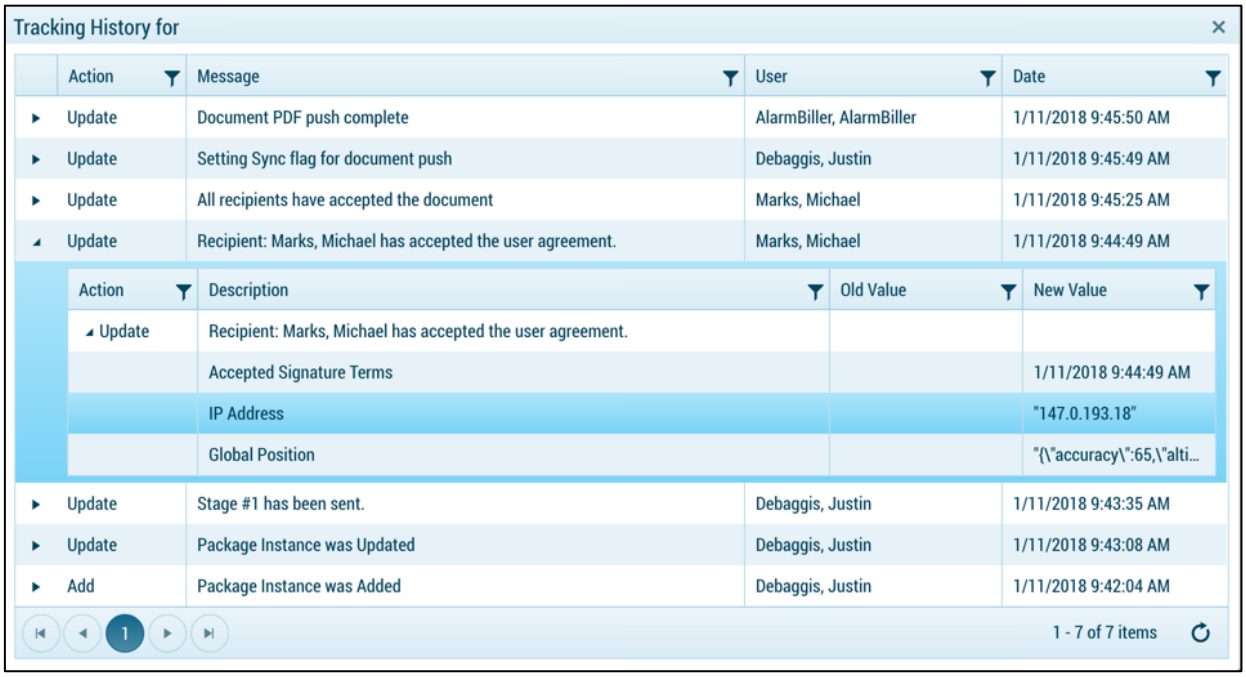
To access the eForm Delivery Setup navigate to the **Home** page and select the **Id** for the eForm Delivery Setup.



Note: You will automatically enter the eForm Delivery Setup when walking through the **create template** process.

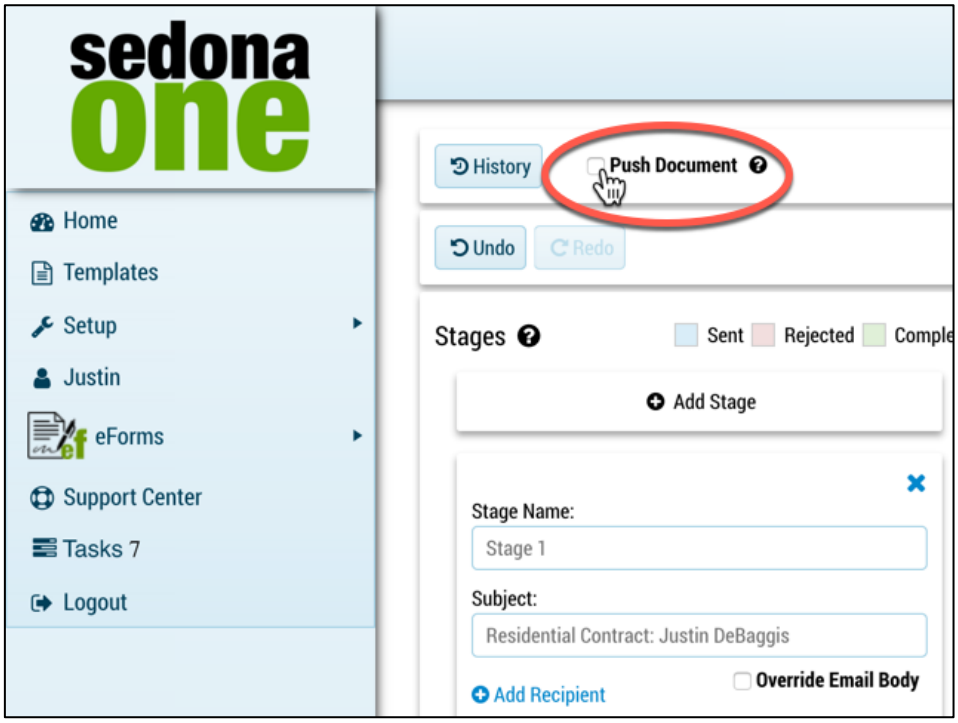
History

History will show all tracking history (audit trail) for this specific eForm Delivery Setup. Any changes made for this eForm Delivery Setup or recipient interaction will be logged in the History.



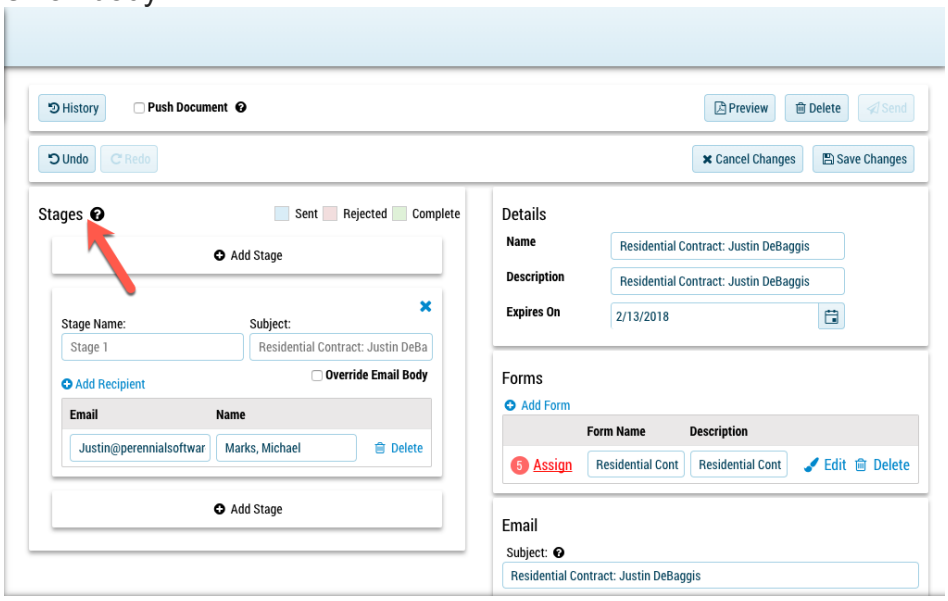
Push Document

This will be automatically checked if this button is checked in setup > preferences. This will only be utilized if the eForms being delivered have the integration with SedonaOffice selected. When checked, after all stages and eForms are complete, the finished eForms will automatically save as a PDF to the customers SedonaDocs. If this is not checked in setup you may manually check the button and select **Save Changes.**



Stages

Stages are workflow and define whom the eForm is going to be delivered too. If multiple stages exist the current stage must be 100% completed before the next stage is triggered. You can create as many stages as you would like. The completed eForms will not be sent to the recipients until each stage is 100% complete. If the SedonaOffice integration is activated the completed PDF will not save to SedonaDocs until each stage is 100% complete. Each stage can contain multiple recipients and custom text for the email body.



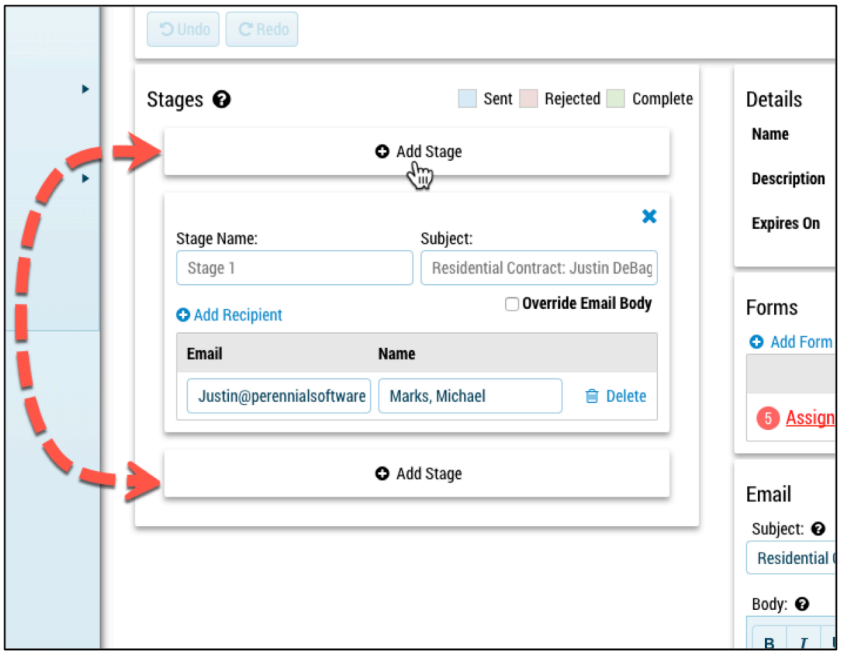
Stages Components

- **+ Add Stage**: Add a stage to the eForm Delivery Setup.
- **Stage Name**: The name of the stage is defaulted stage 1, stage 2, stage, 3 etc. This can be overridden by typing into the stage name. This is for internal use to identify which stage the eForm is in.
- **Subject:** The subject line for the email sent to the recipients in the stage. The recipient will be able to view this subject line.
- **Override Email Body**: If checked, you may enter custom text to the body of the email for the specific stage. If unchecked the default email body will be used in the bottom right of the eForm Delivery Setup.
- **Recipients**: Recipients whom may be assigned to eForm template fields to interact with the form. These may also be individuals whom are responsible to view the form only.
- **Delete:** This will delete the selected recipient.

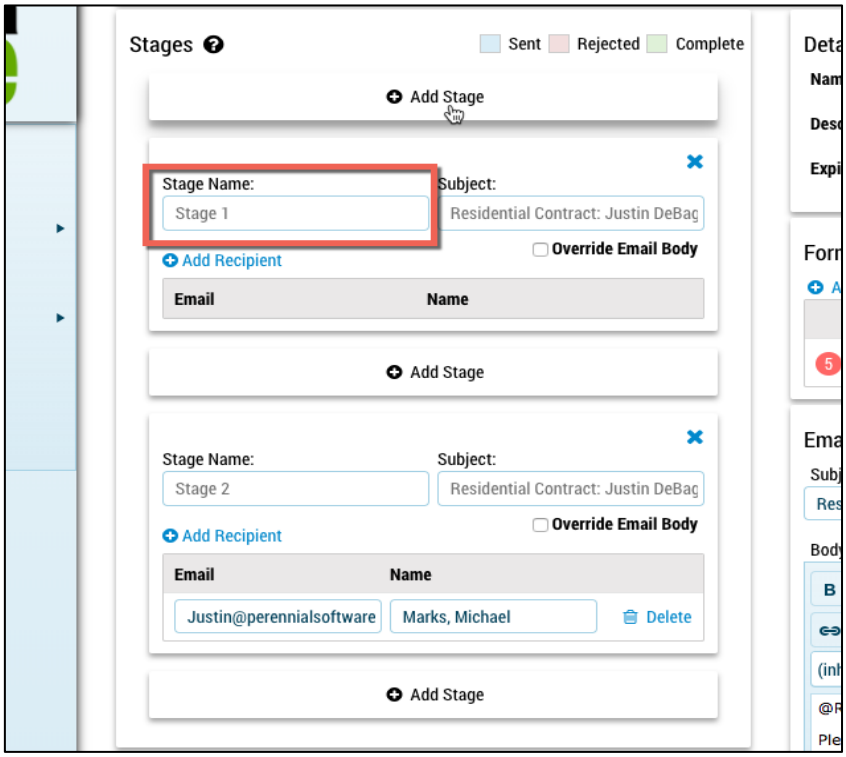
Adding Stages

To add a stage, follow the instructions below:

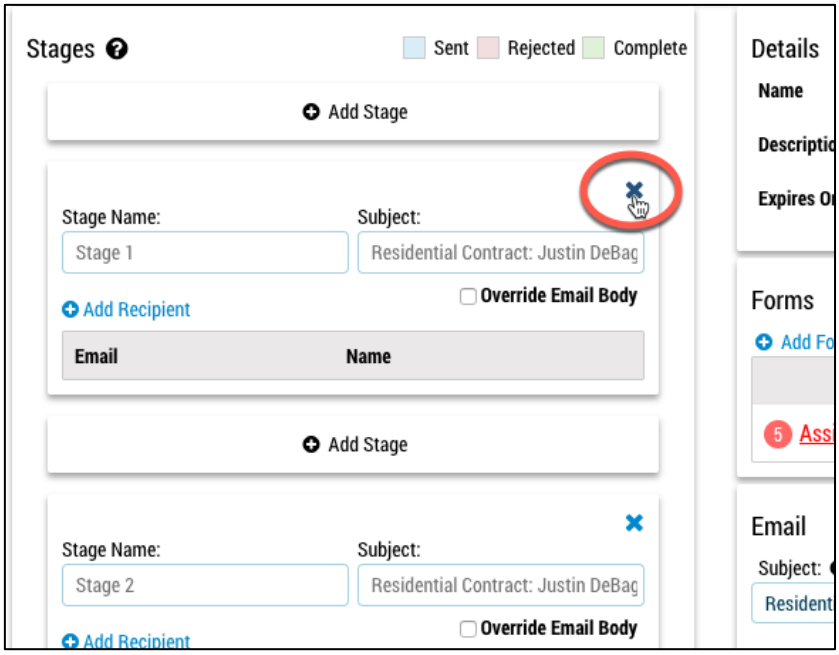
1. Click **+ Add Stage** before or after the current stage.



2. After a stage is added, the stage name will update based on the order.



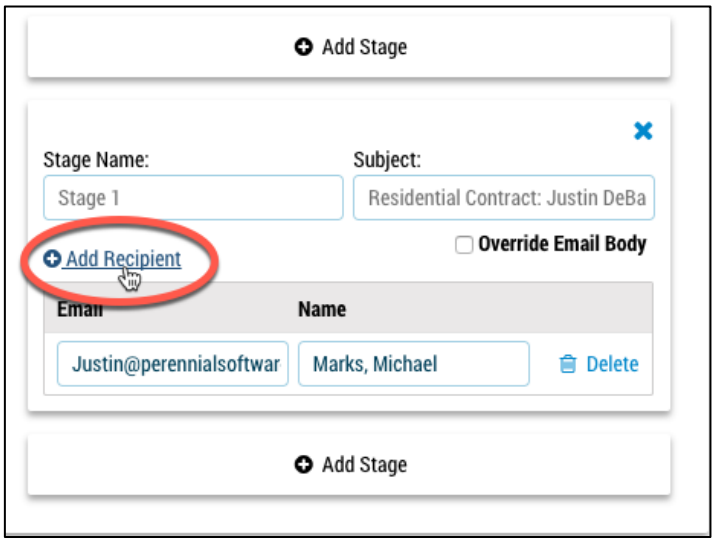
3. If the stage is not needed, select the **X** for the specific stage.



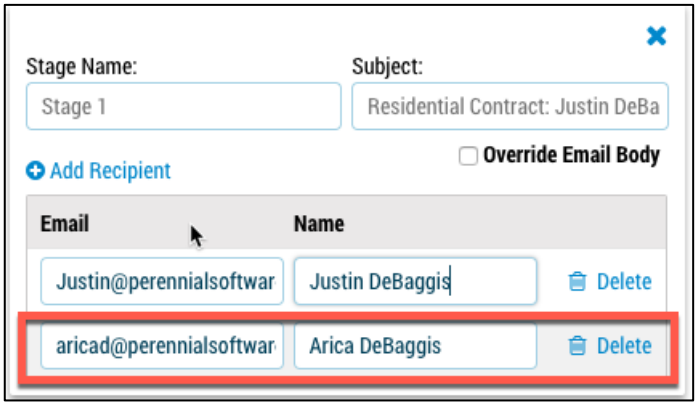
Adding Recipients

Once you pick the templates to send, you add the recipients who will receive, fill out or receive a copy of the eForm(s).
Below are instructions on how to add a recipient(s) for each stage:

1. Navigate to the appropriate stage
2. Select + Add Recipient



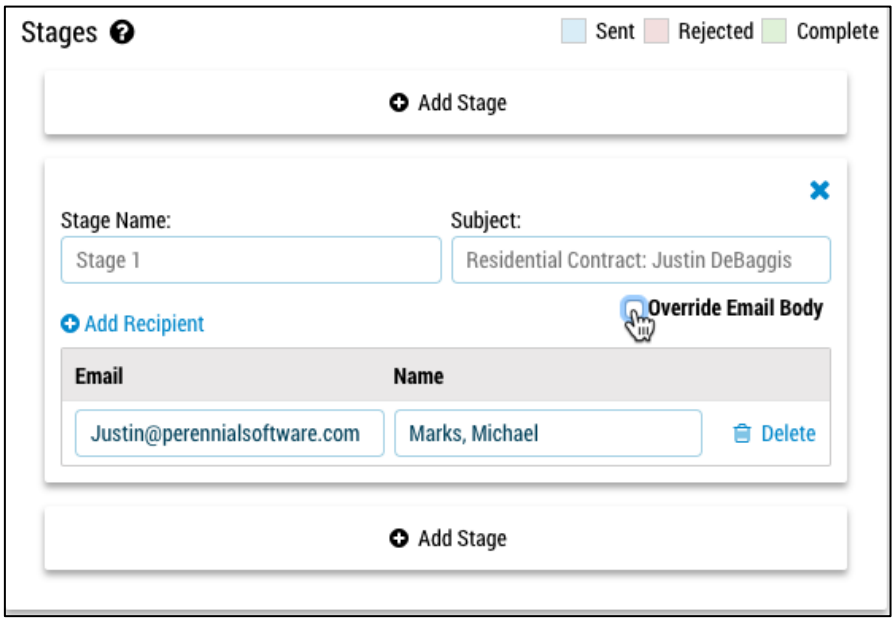
3. Type in the email address and name of the recipient



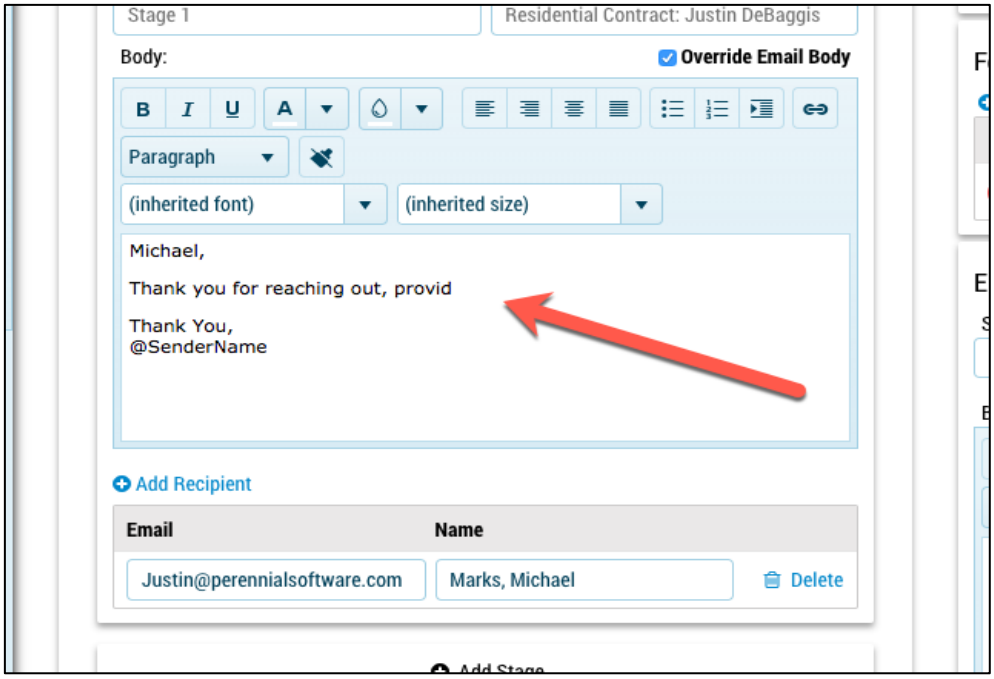
Custom Email Body

Below are instructions on how to customize the body of the email for each stage:

1. Navigate to the appropriate stage.
2. Check **Override Email Body**.

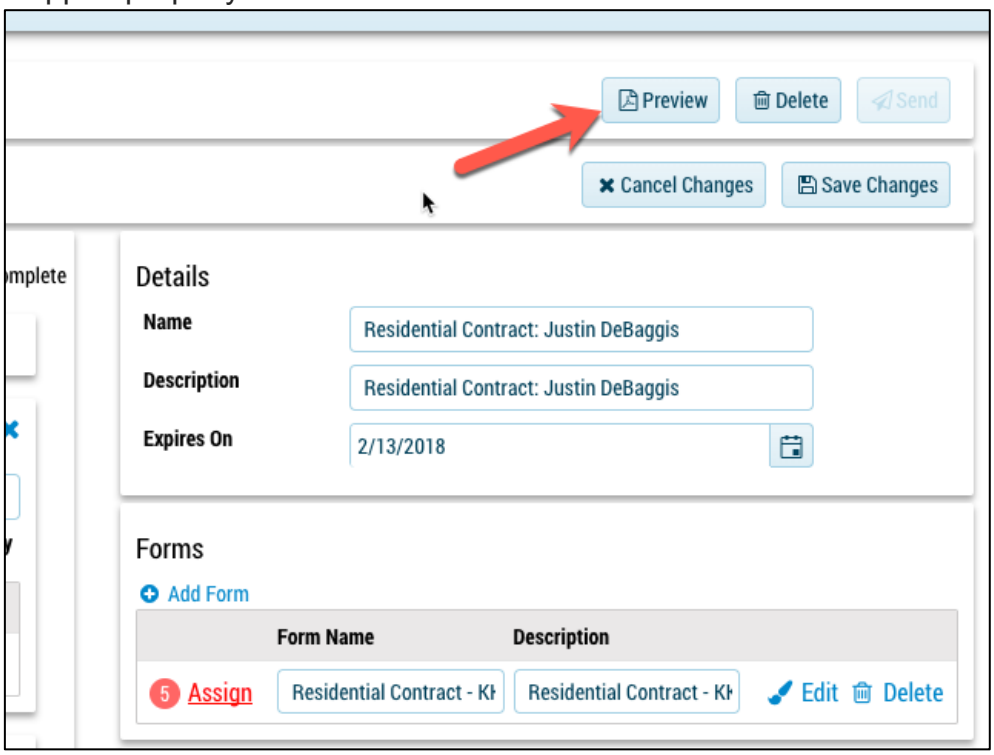


3. Type the custom message you would like to appear on the delivered body of the email for the eForm.



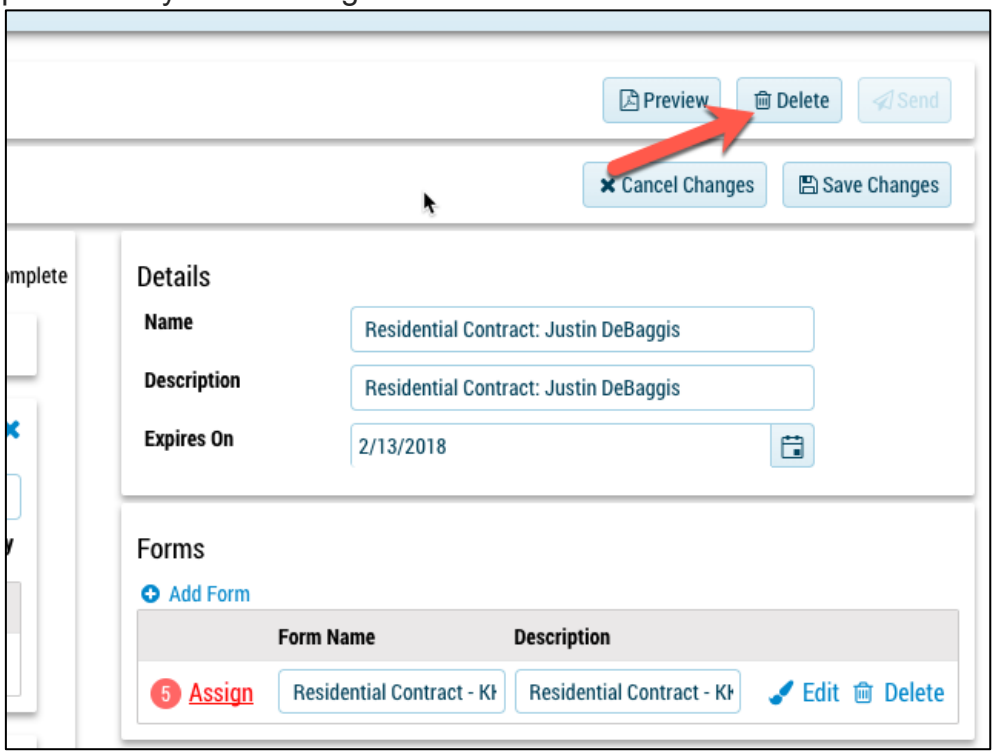
Preview

Selecting **Preview** will download a PDF of what the finished eForm will look like. This is helpful if you have merged data fields and you would like to make sure everything mapped properly.



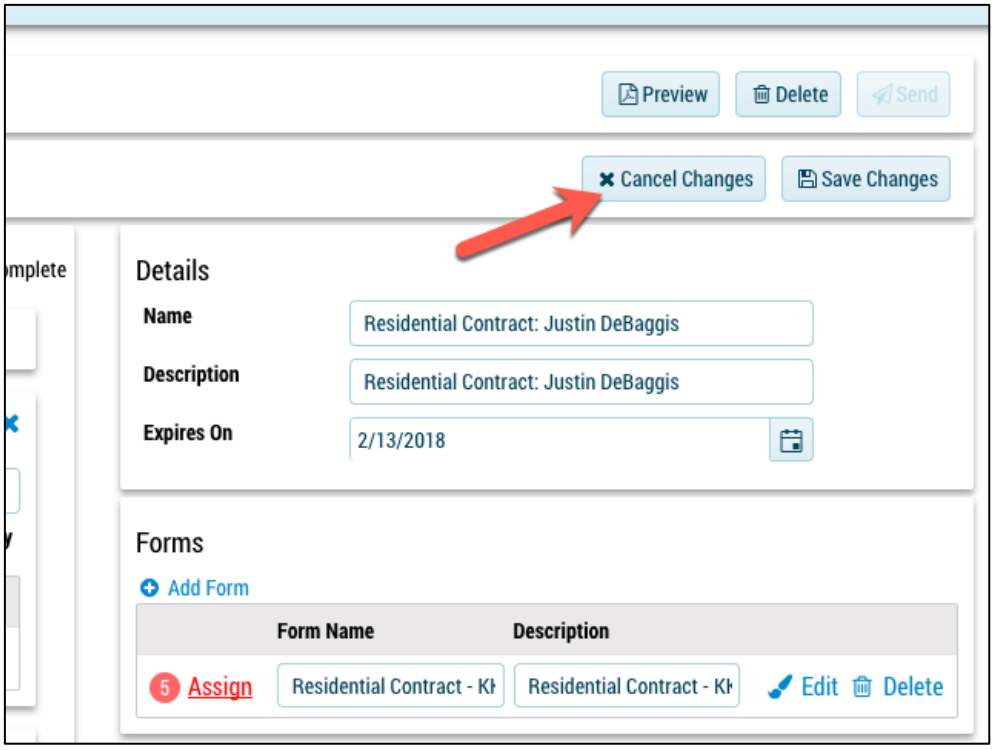
Delete

This will inactivate the form and will add it to the inactive queue on the home page. To permanently delete navigate to home > inactive and select the delete button.



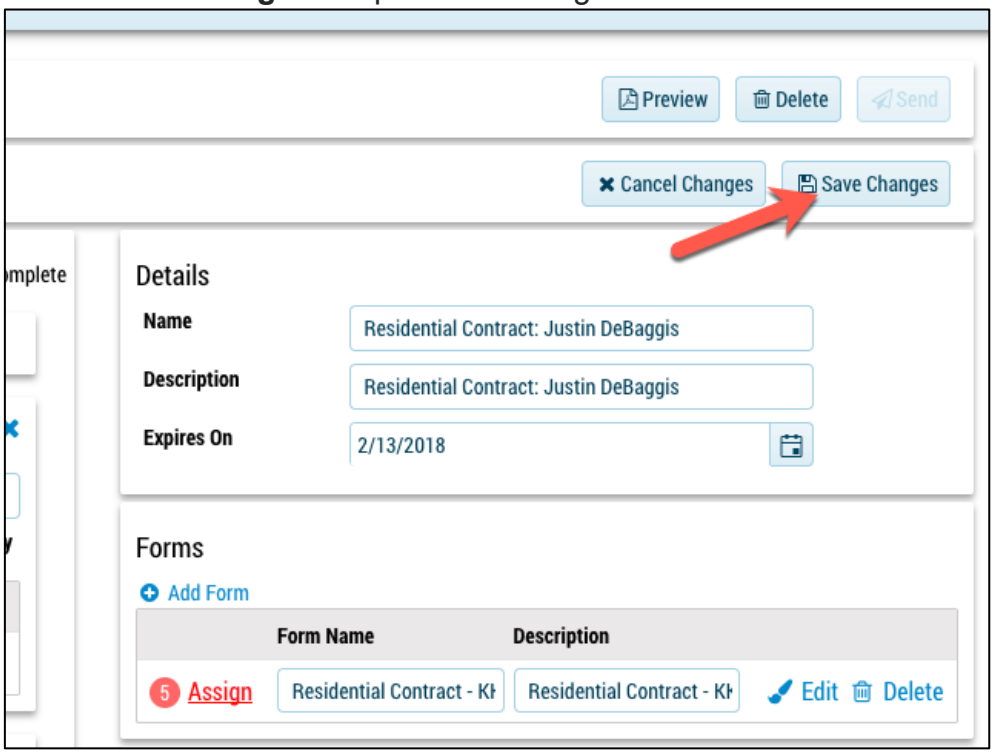
Cancel Changes

Select **Cancel Changes** to discard any changed made in the eForm Delivery Setup. For example, if you type in a custom email body, add multiple recipients and select cancel changes the previous changes will be lost.



Save Changes

Select **Save Changes** to save any changes you have made in the eForm Delivery Setup. For example, if you type in a custom email body, add multiple recipients and select **Save Changes** the previous changes will be saved.



Details Components

- **Name:** Name of the form is used internally. We recommend a somewhat detailed name to differentiate from other delivered eForms. This fields can be filtered and searched by in the **Home** screen.
- **Description:** Description of the form is used internally and can be the same as the name or add a deeper description. This fields can be filtered and searched by in the **Home** screen.
- **Expires on Date:** This date is when the eForm will expire and the recipient will no longer be able to access the form. Once expired this will go into the expired queue on the **Home** page.

Forms Components

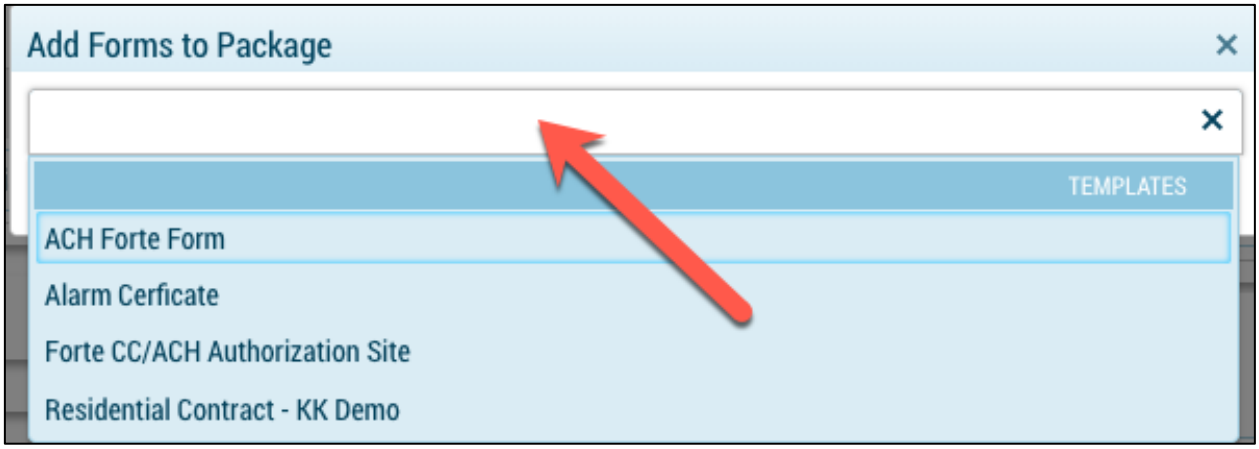
- **+Add Form:** this will show the library of eForms
- **Assign Recipients:** Assign the recipeints from your recipient list to the fields they will have access too in the specific eForm. If there are fields that sender must fill out, they will be available as well.
- **Edit:** Edit will allow you to edit the template for this one-off form. This will **not** update the global template in the Template tab.
- **+Add Form:** Pick from the Template library and turn this eForm Delivery Setup into a package
- **Delete:** Delete the eForm Delivery Setup and set it in the inactive queue

Add Additional eForms

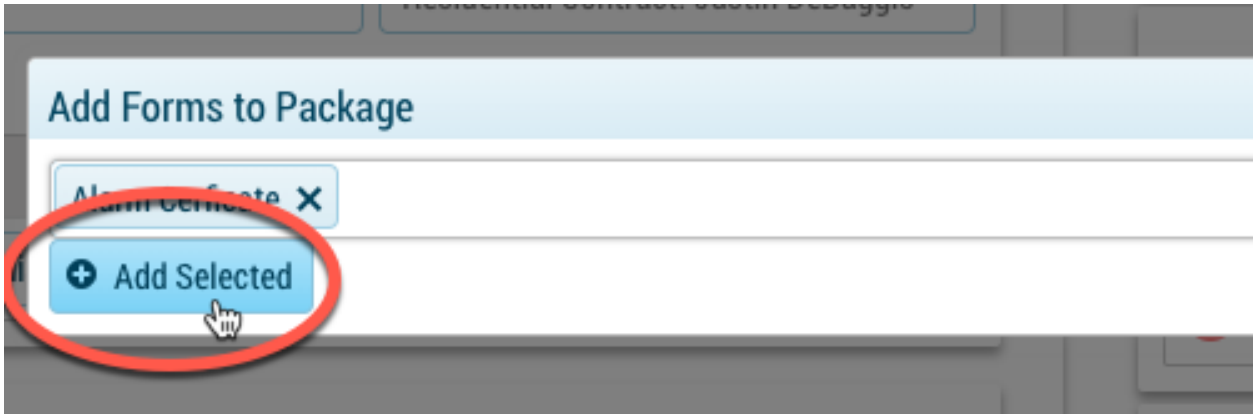
To add an eForm follow the instructions below:

1. Select **+Add Form.**

2. Pick from the drop down of the template to add.



3. Select **+ Add Selected**.



Assigning Recipient to Fields

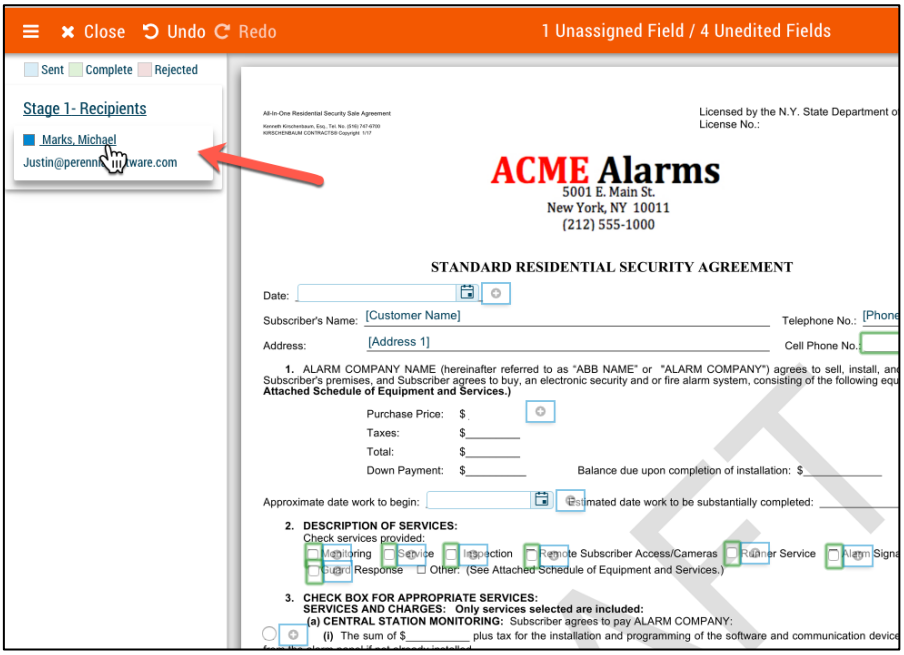
When selecting the assign button, the sender has two options. The first is to assign recipient(s) to assignable required/not required fields. The second is for the sender to fill out required/not required form data fields. When creating the template specific fields will be set as editable for the sender, recipient or both. They will also either be required/non-required determining if the eForm can be sent and completed.

Assign a recipient

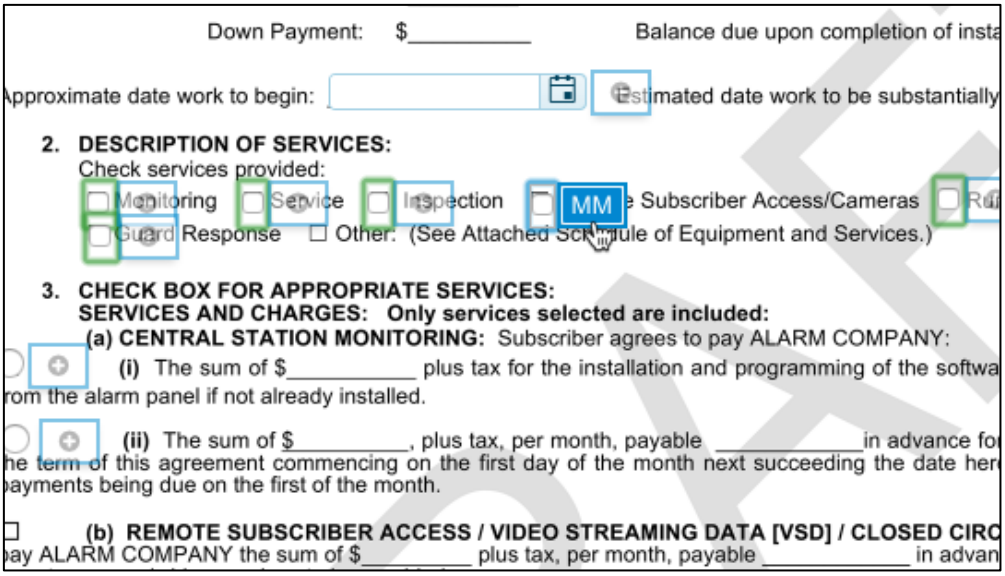
To assign a recipient to a field follow the instructions below:

1. Select the **# Assign** next to the eForm.

2. Select the recipient you would like to assign to a field(s).
   Note: There may be multiple recipients available to assign to fields.

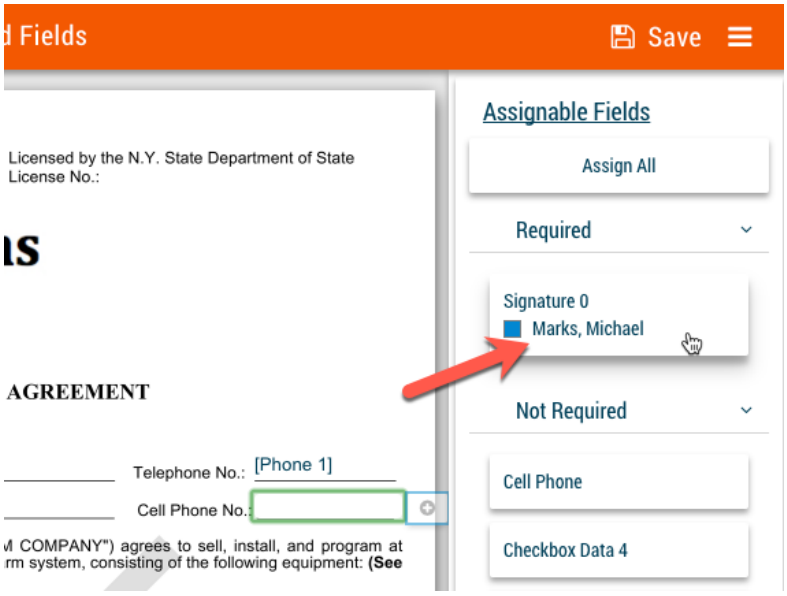


3. Assign directly on the template by clicking on the **+** button next to the field.



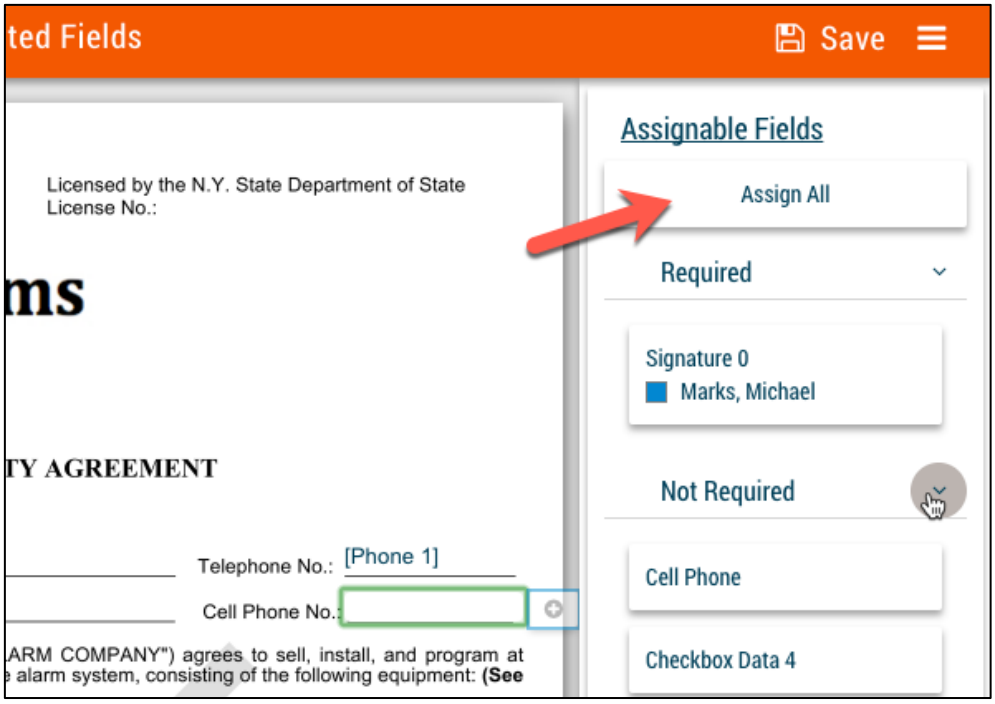
4. You may also assign on the side bar to the right labeled **Assignable Fields**.

5. Make sure the recipient is selected and click on the field.



6. You will be able to assign to **Required** and **Not Required** fields.

7. If you would like a recipient to have access to all assignable fields, select **Assign All.**

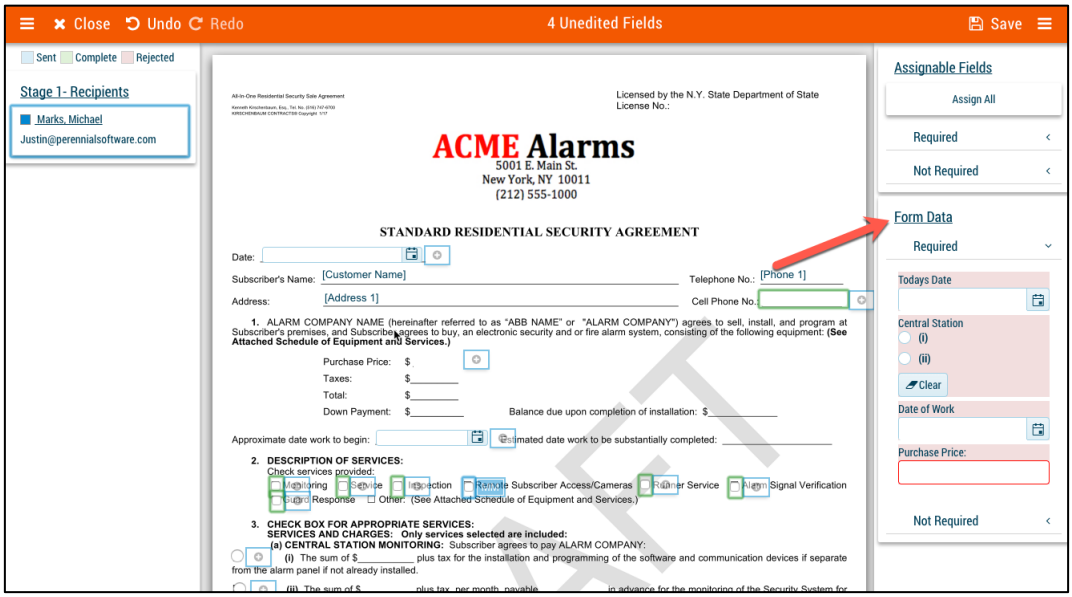


Important Note: If the field is not required like a check box and you do not want a recipient to interact with the field make sure you do not assign to that recipient.

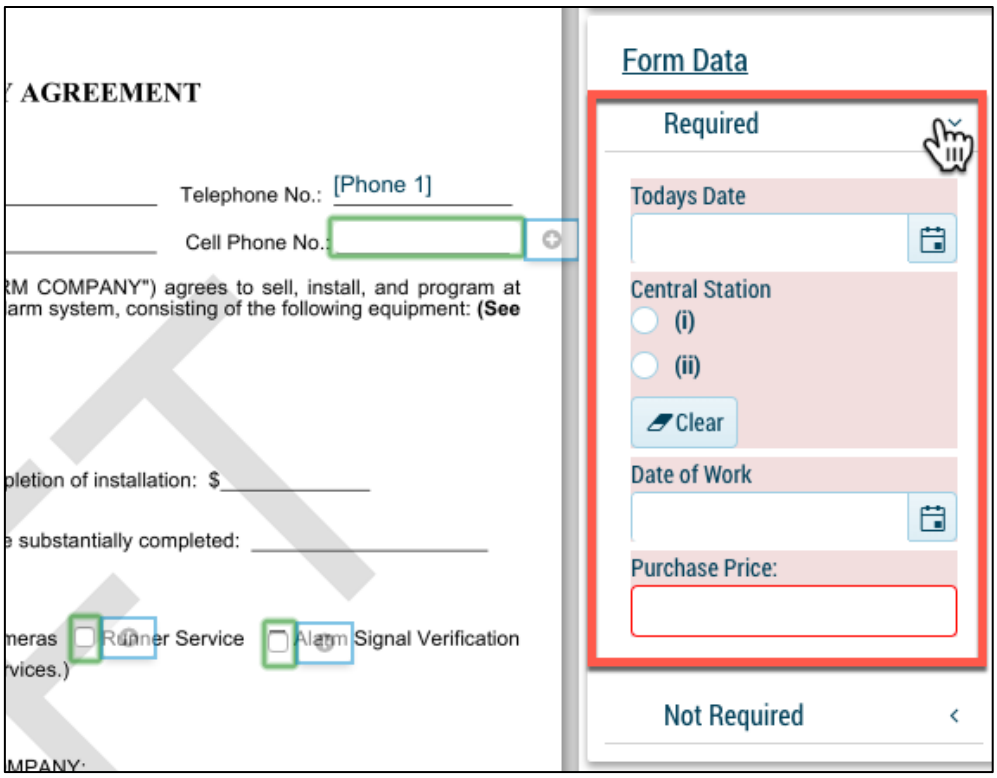
Sender - Fill out Editable Form Data Fields

Below outlines how a sender can fill out form data fields that are editable required or not required on a template:

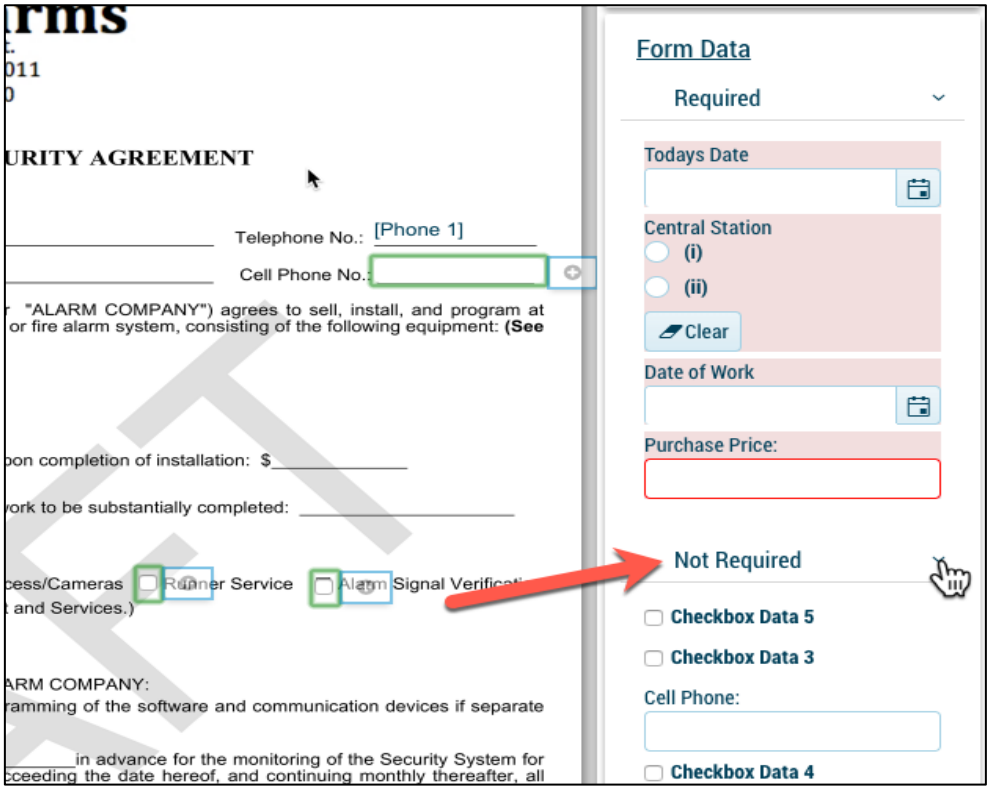
1. Navigate to the right of the form to view the required.



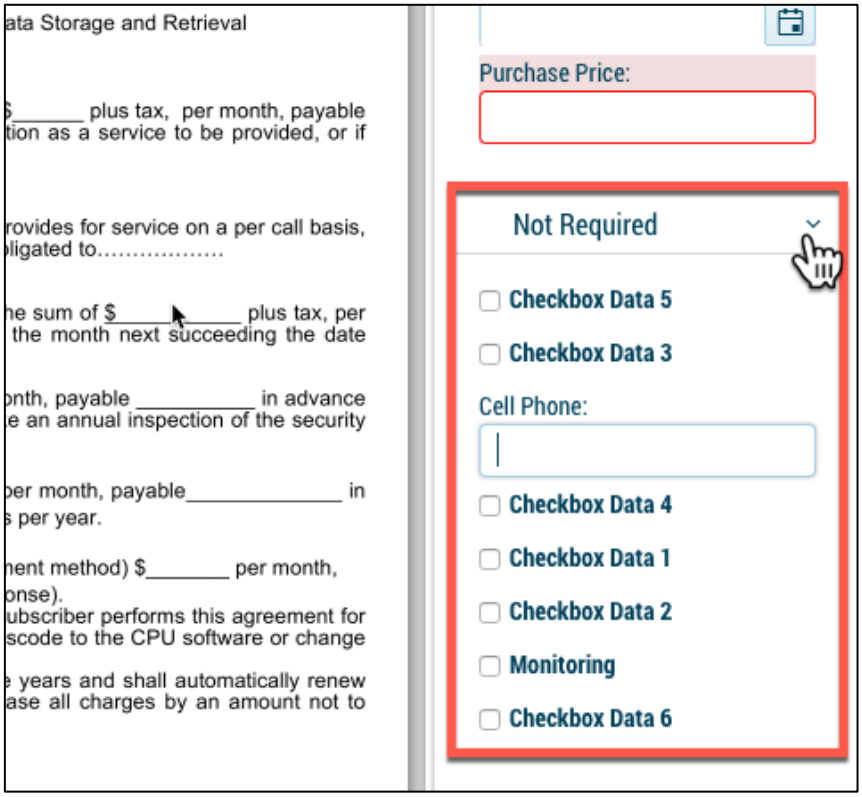
2. The required fields for the sender must be filled out in order to send the eForms.



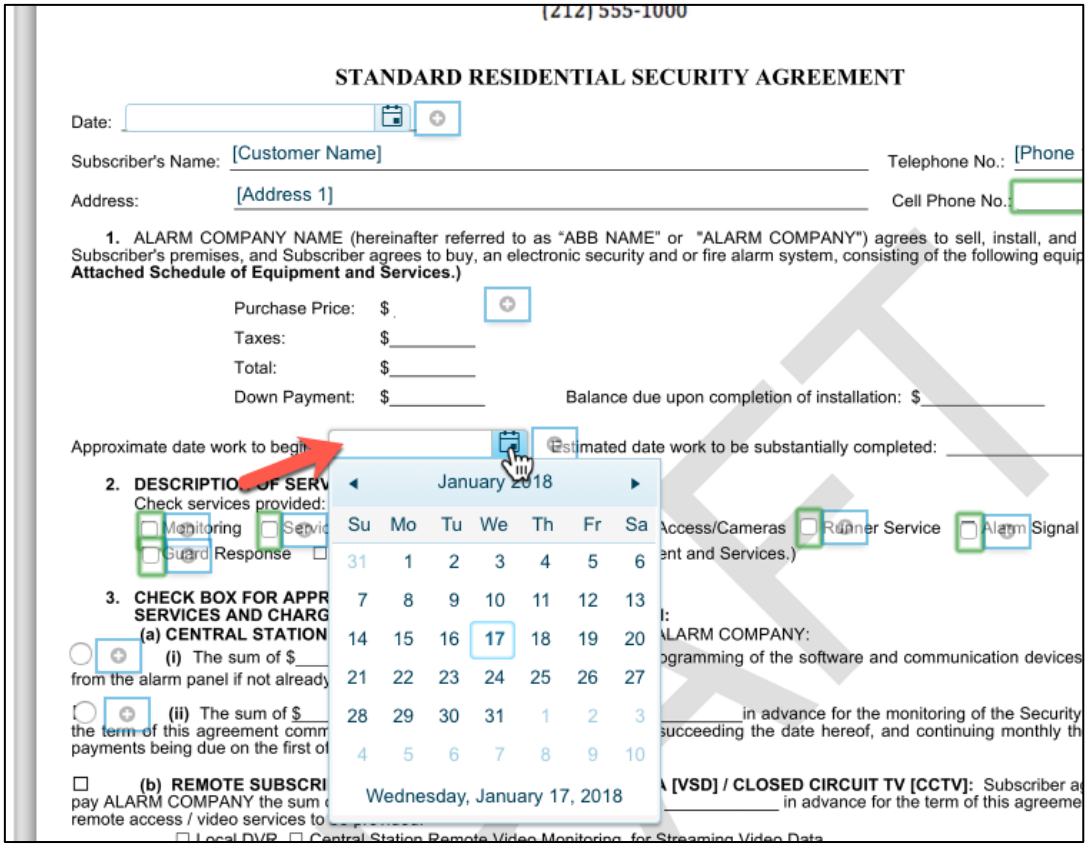
3. To view the not required fields select the drop down.



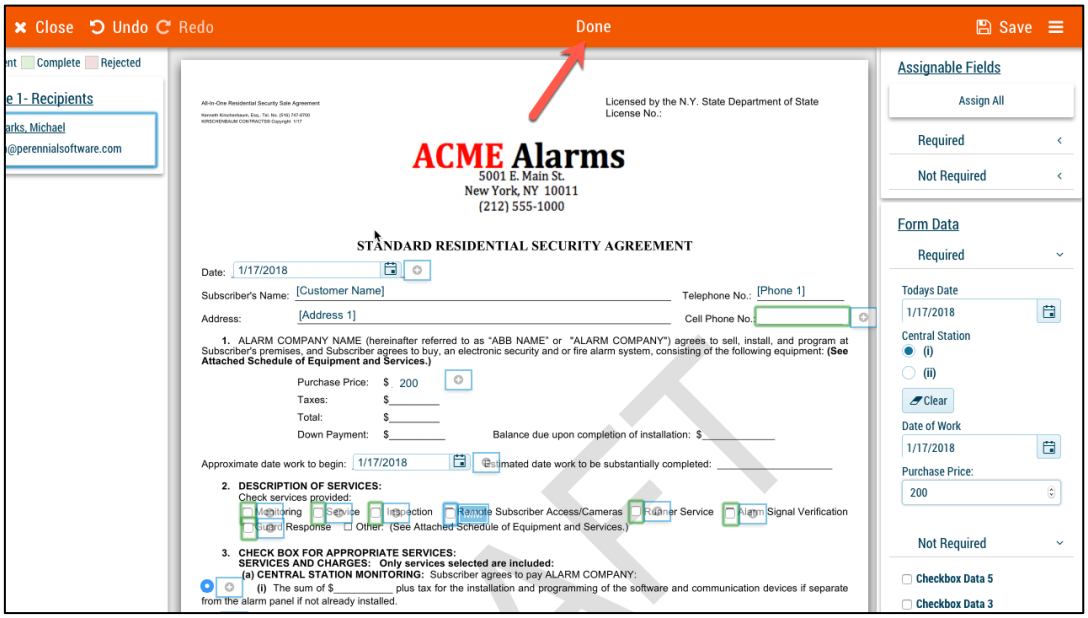
4. Not Required fields can be filled out by the sender but are not required for the form to be sent.



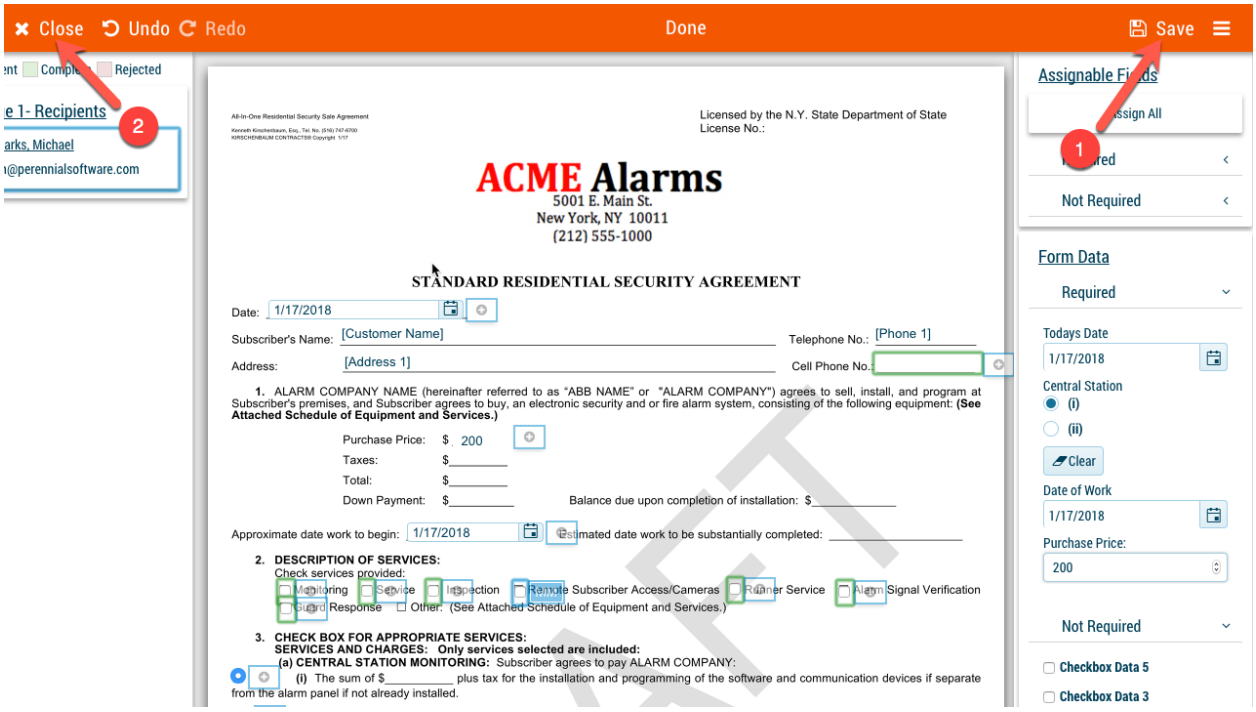
5. The sender may also fill out form data field directly on the template.



6. Once all Required Assignable Fields and Forms Data fields are filled out you will see Done at the top of the eForm.

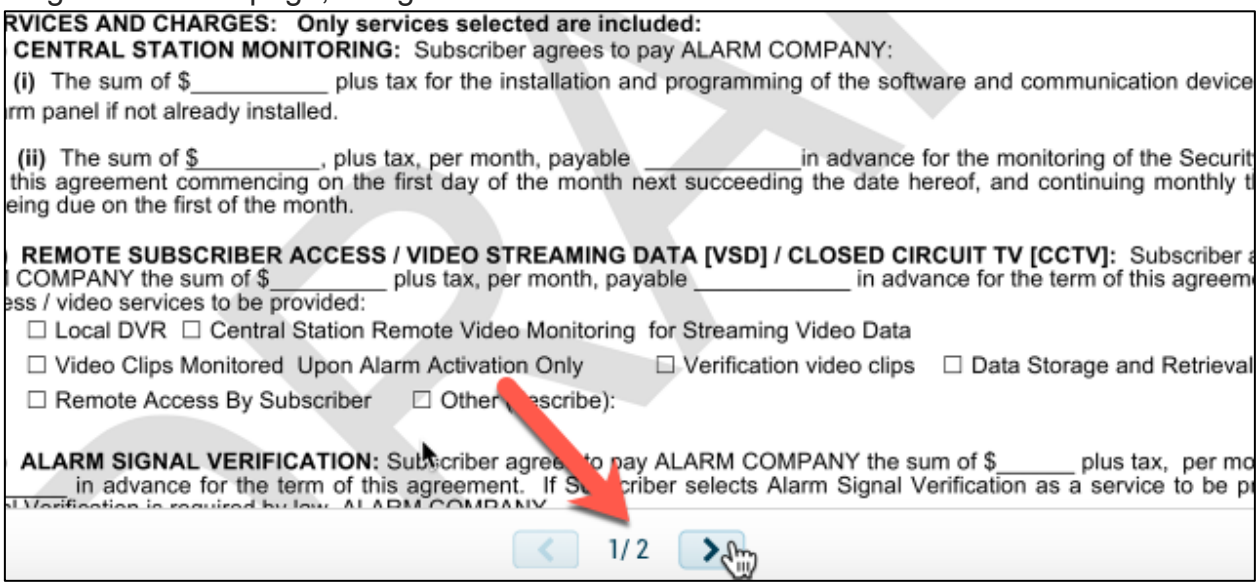


7. Select **Save** and **Close.**



Multiple Pages

To go to the next page, navigate to the bottom of the form and select the arrow **>.**

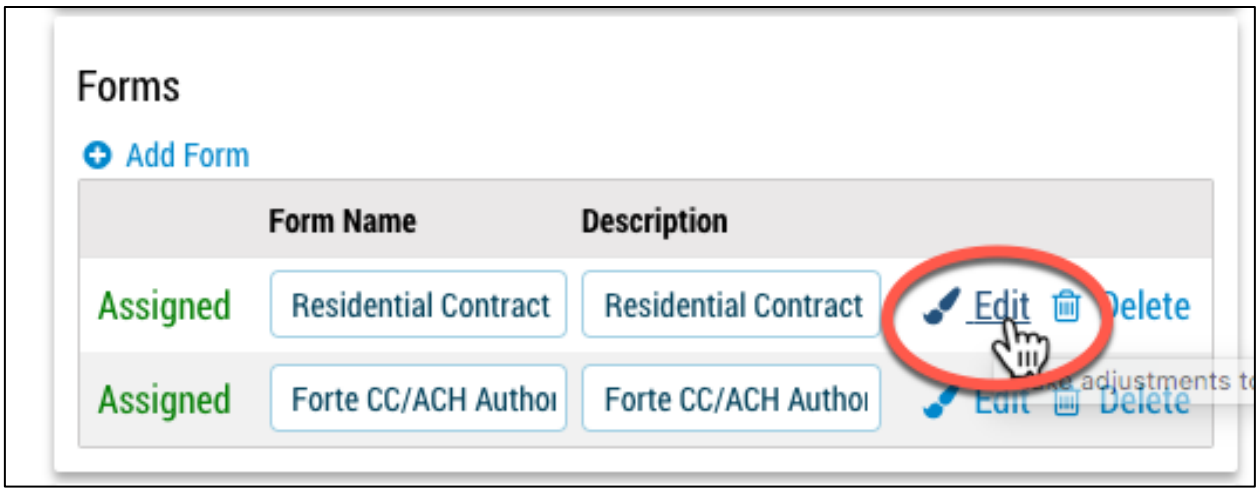


Edit an eForm

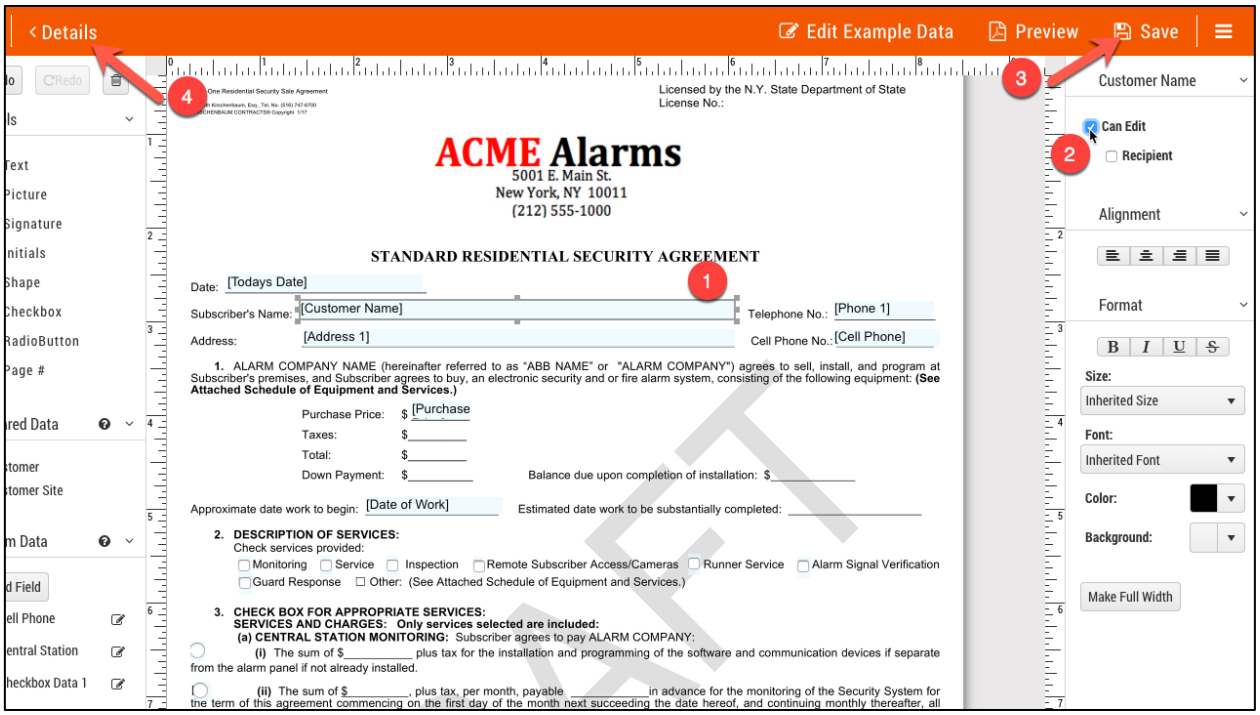
If you would like to make an adjustment to the template you will need to select edit. This will not edit the Template in your library only this instance your delivering to recipients.

To edit a eForm in the eForm Delivery Setup follow the instructions below:

1. Select **Edit** next to the appropriate form.

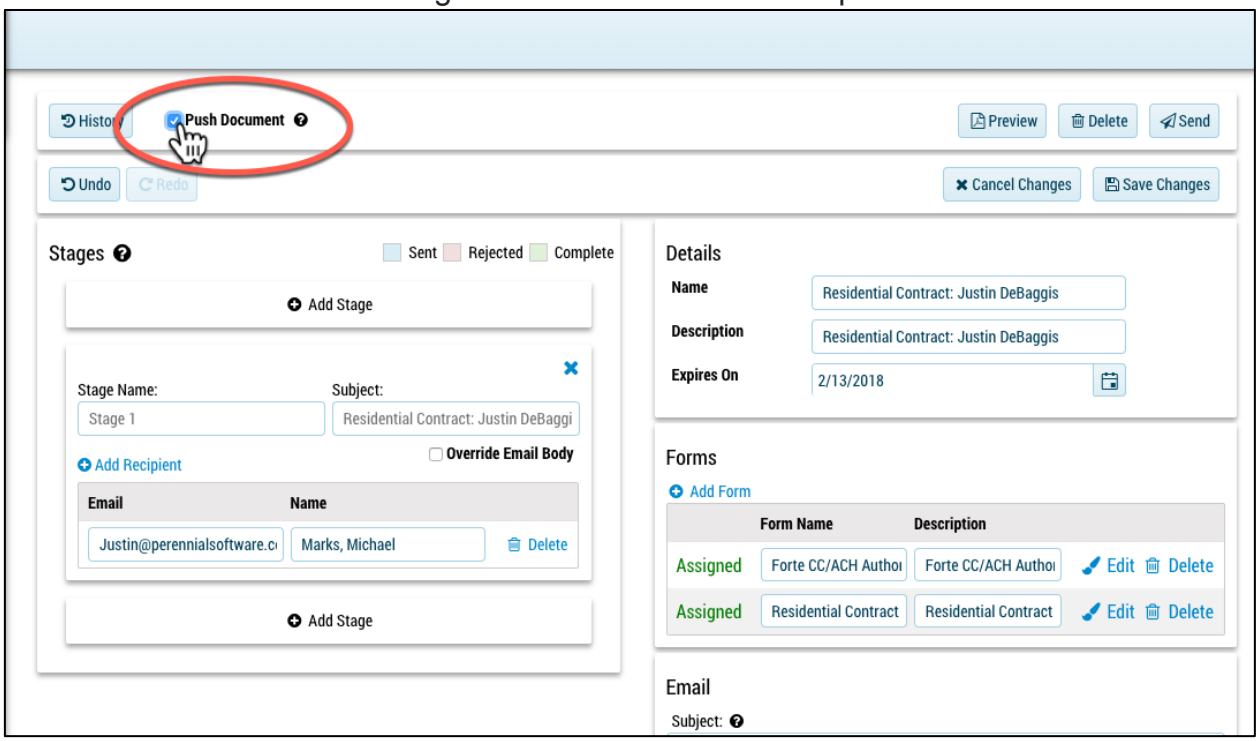


2. Make the adjustments to the template and select Save and Details to go back
Note: I provided an example below of a field I wanted to make editable for a recipient



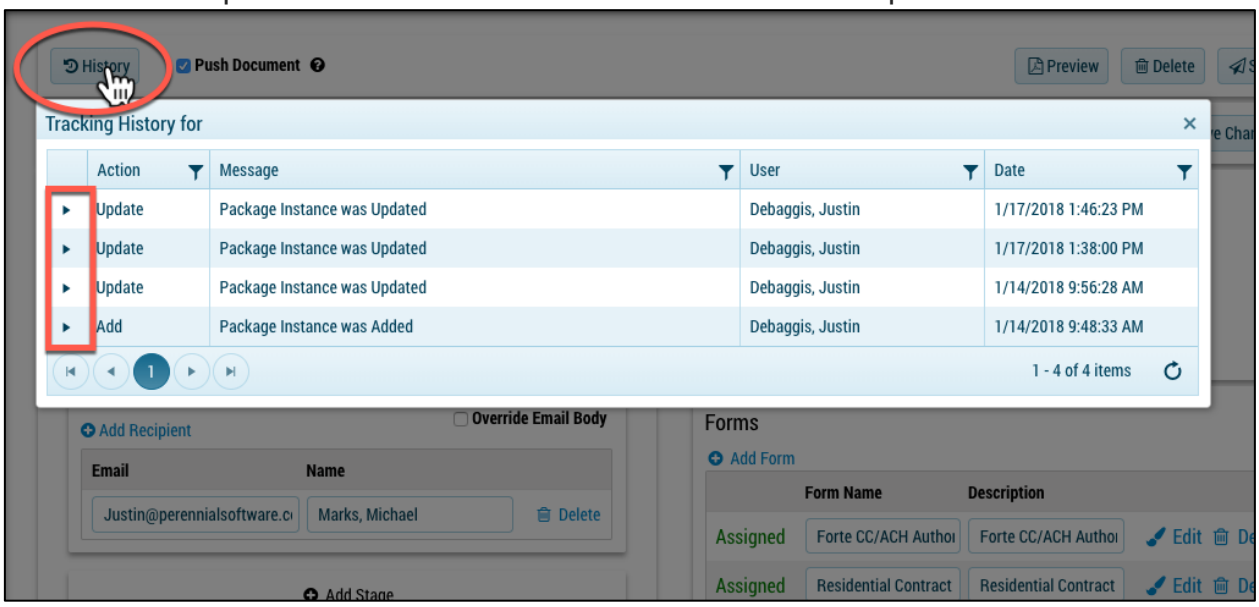
Push Document

If checked the document will automatically be saved to SedonaDocs for the customer selected. Based on the data type for the integration (customer, site and system) is what level the document will be saved at. If the button is not checked you may manually push the document on the Home Page after the eForms are completed.



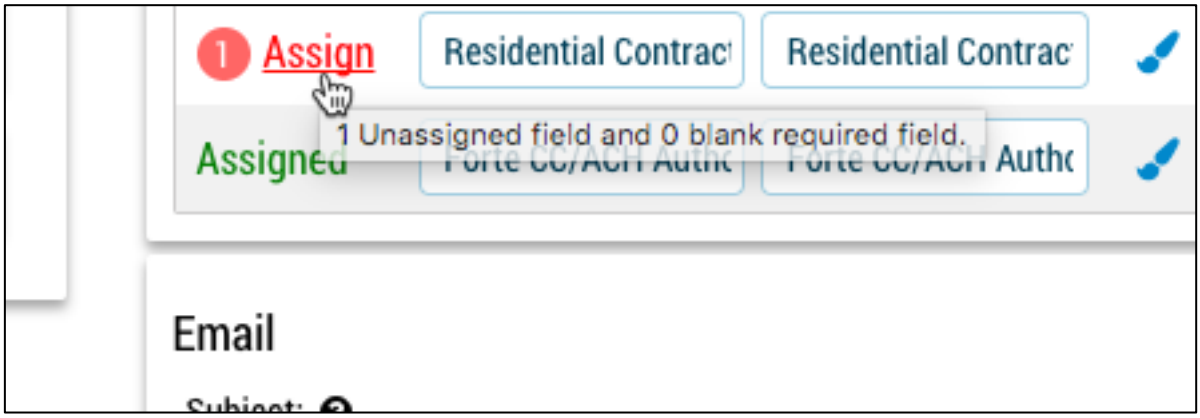
History

History will show an audit trail of any add, updates or interaction by a recipient or user. Click on the drop-down arrows next to the action to see more specific details.

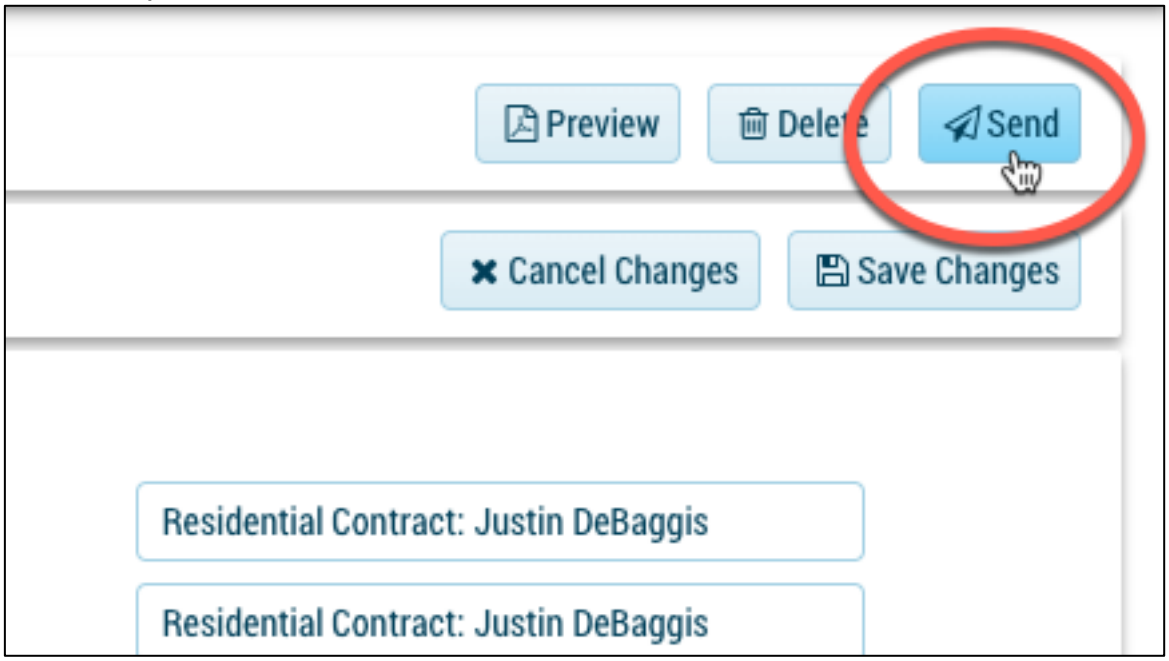


Send

Once all eForms are set at assigned you may send the eForm. If it is greyed out, you need to assign a recipient to an unassigned required field or fill in a required form data field.

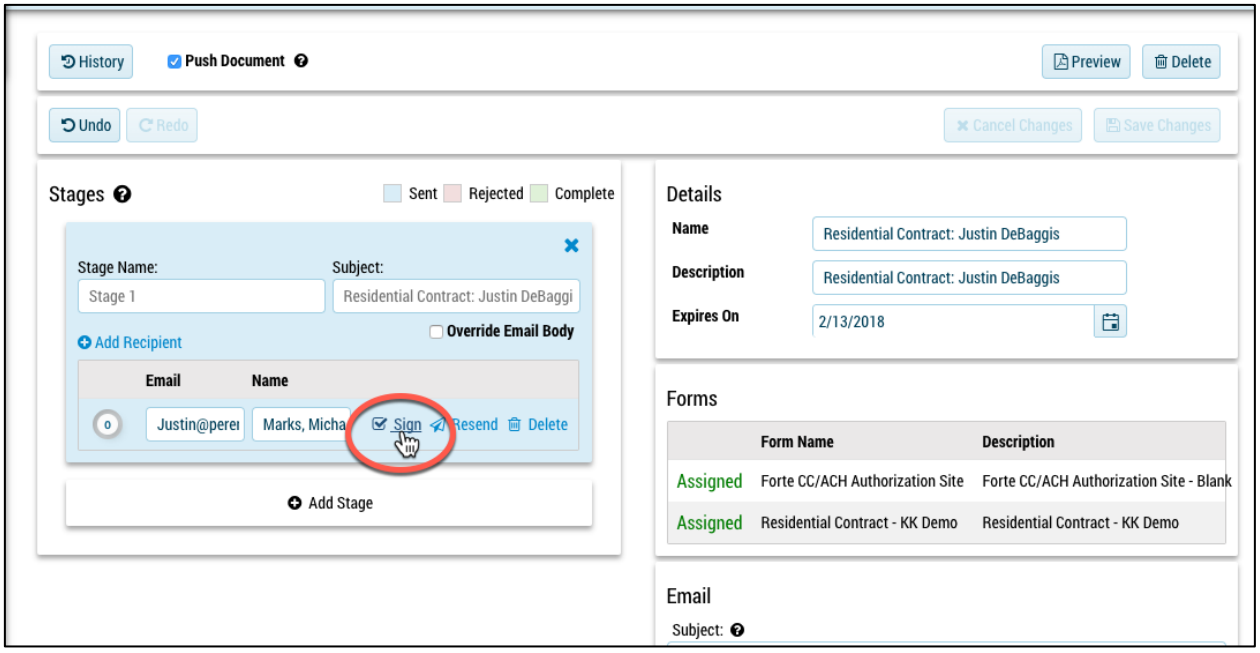


Once completed select **Send.**



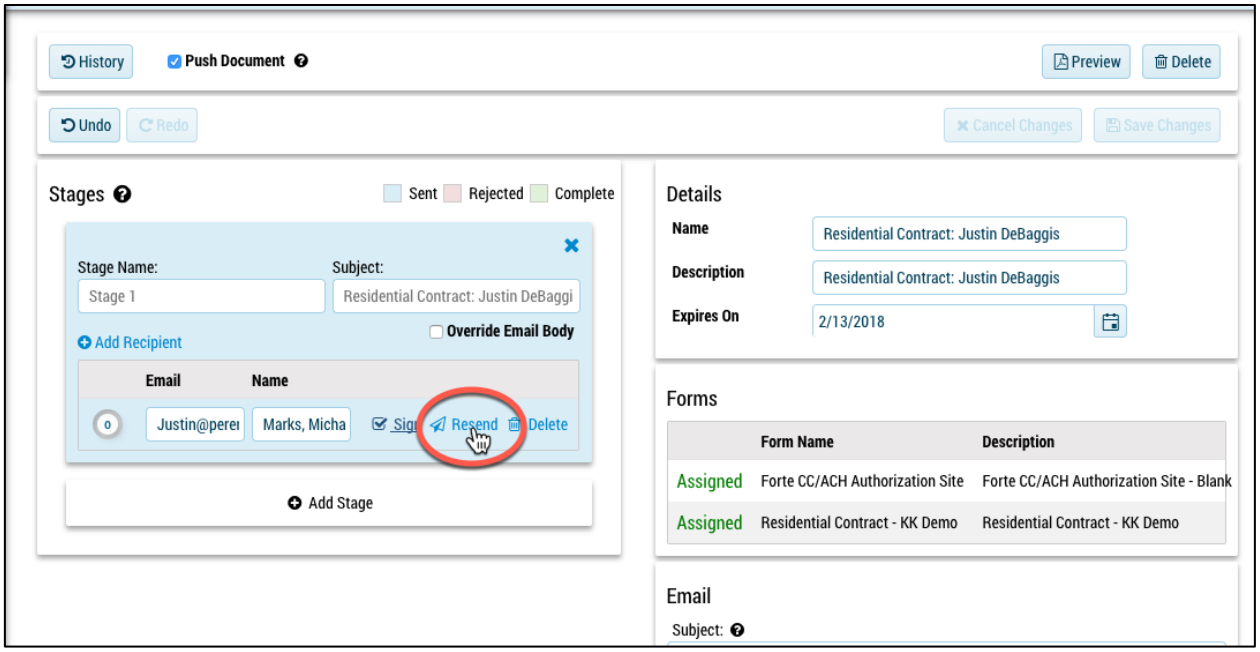
Sign Now

After the form is sent **Sign** will be available on the stage next to the recipient. If you are on site with the recipient select **Sign** to bypass the recipient having to wait for the email.



Resend

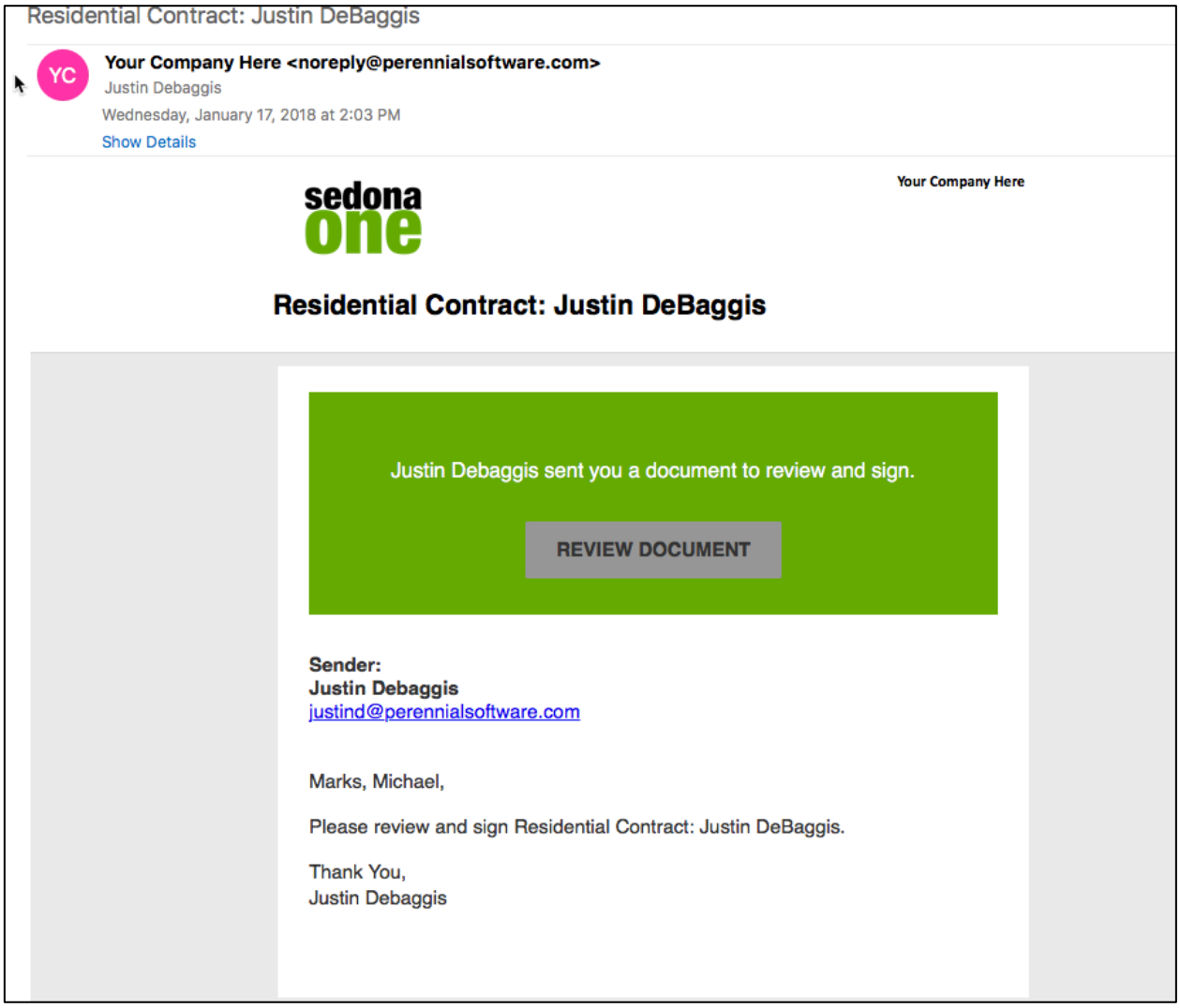
To manually resend the eForm to the recipient select **Resend** next to the stage and recipient.



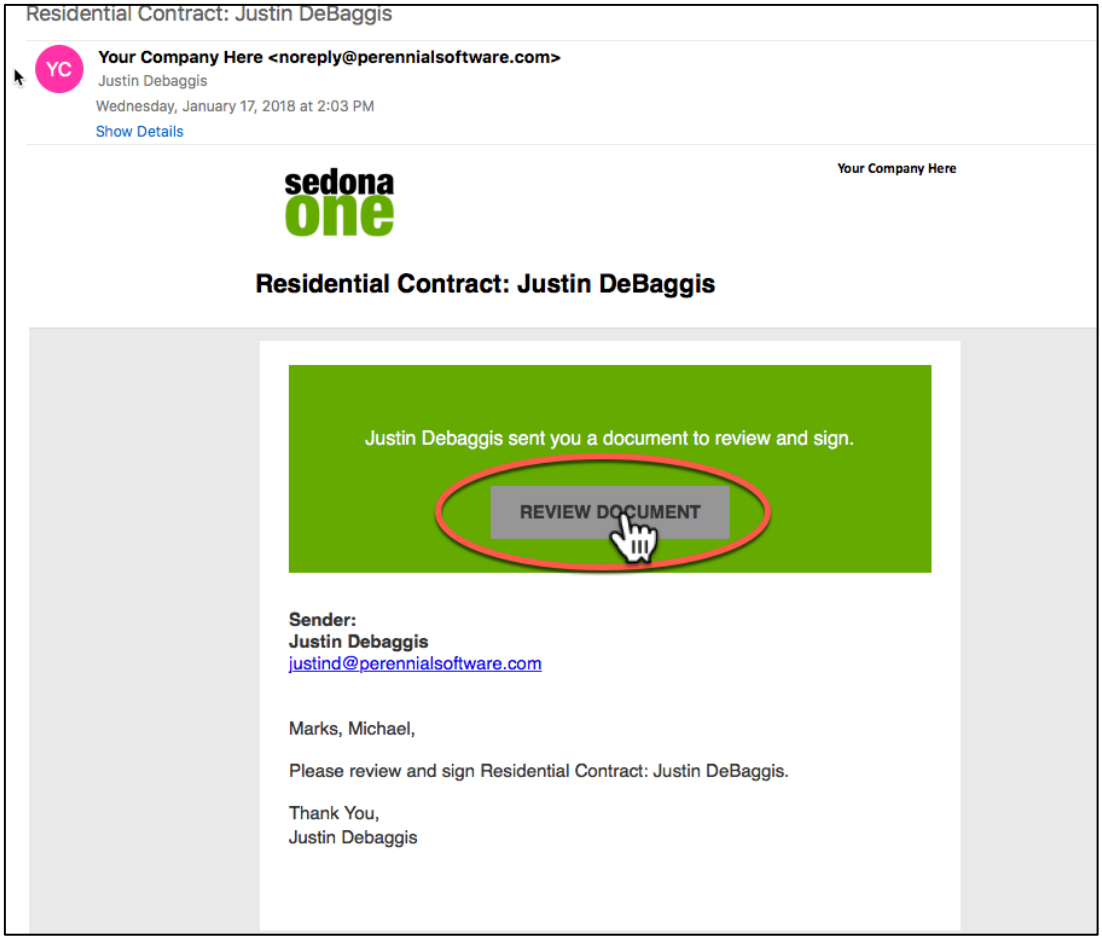
Recipient Completing Emailed eForms

If you select **Sign** you will be able to bypass the email process.

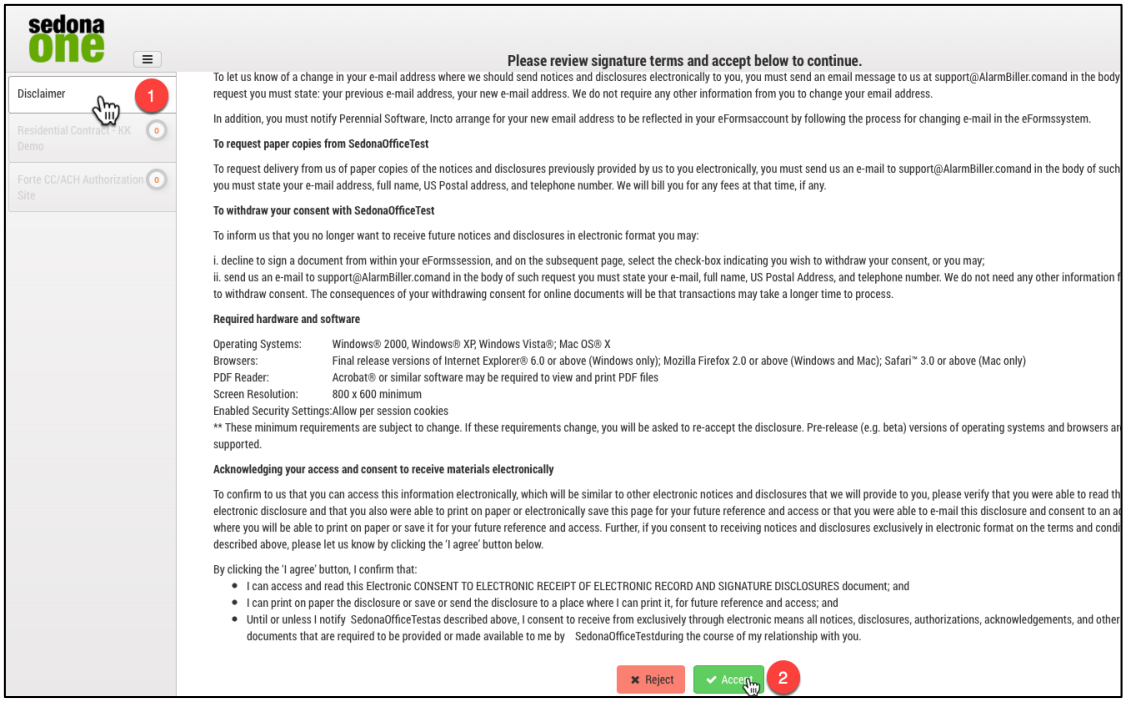
1. Recipient will receive emailed eForm.



2. Select **Review Document** to view the eForm(s) .

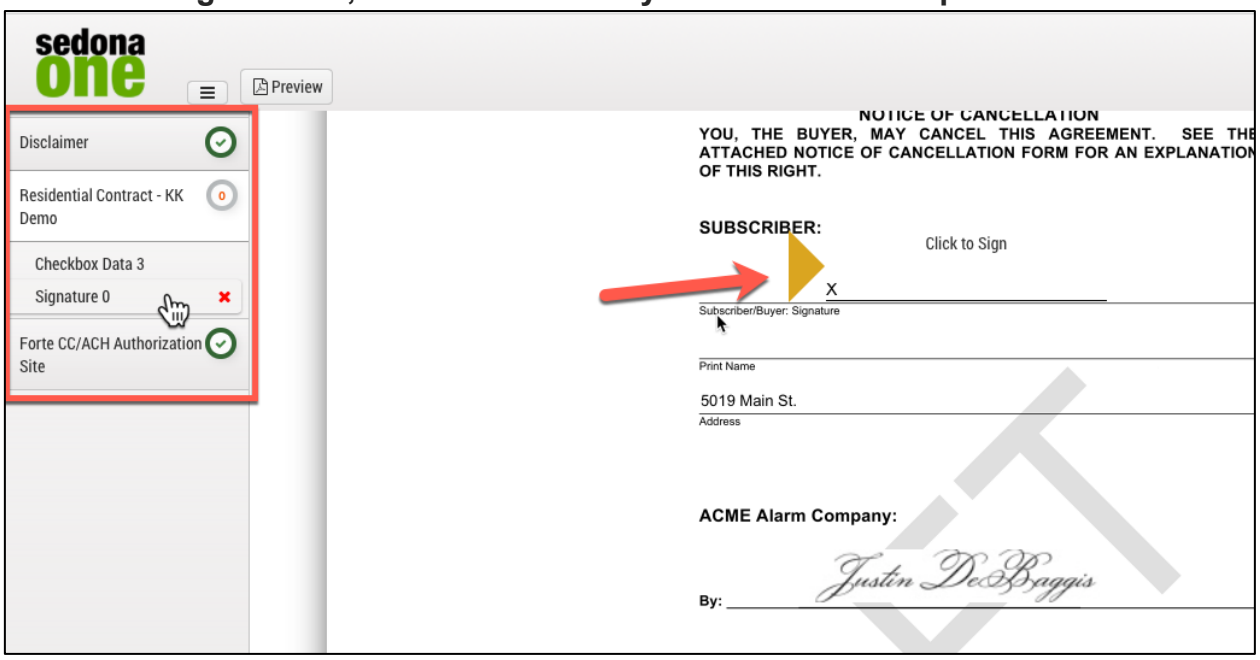


3. Navigate to the bottom of the electronic signing Disclaimer and click **Accept** to view the eForms



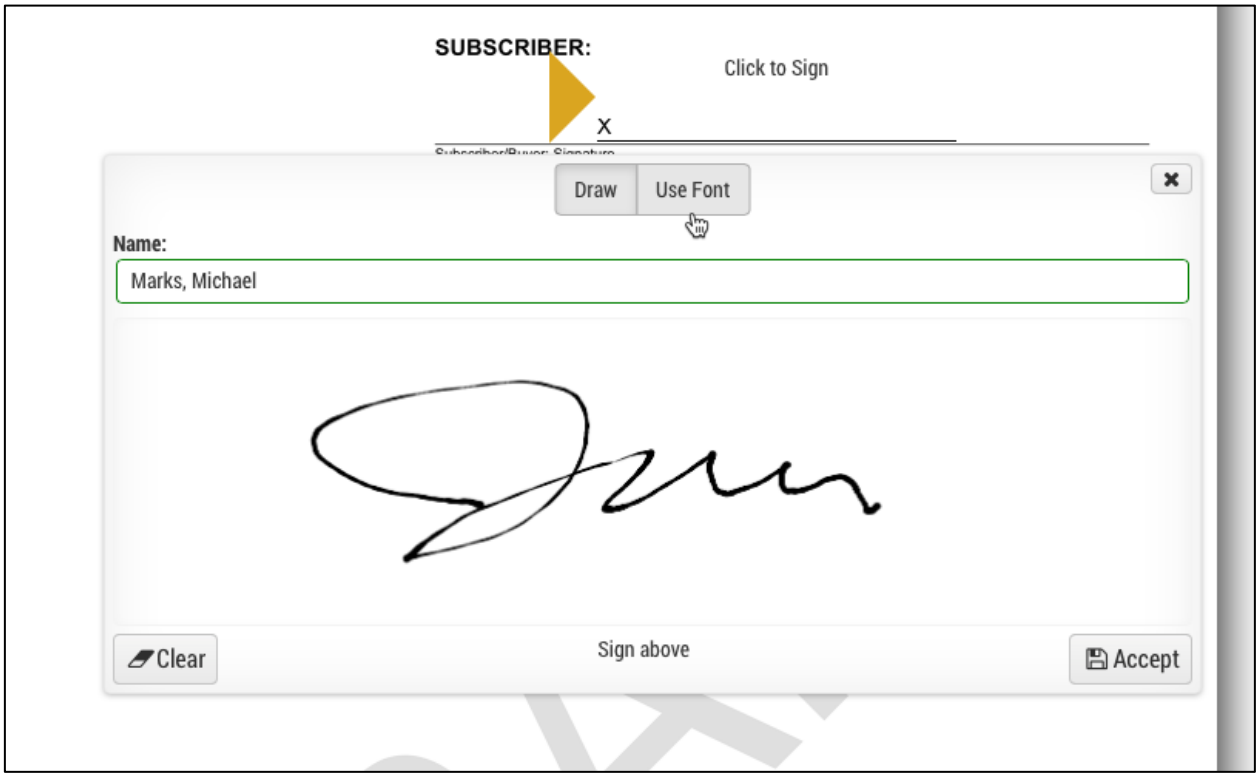
4. Select the eForm and field(s) on the left.

   Note: The required/not required field will be listed under the eForm. By clicking the field, it will automatically take them to the specified field.

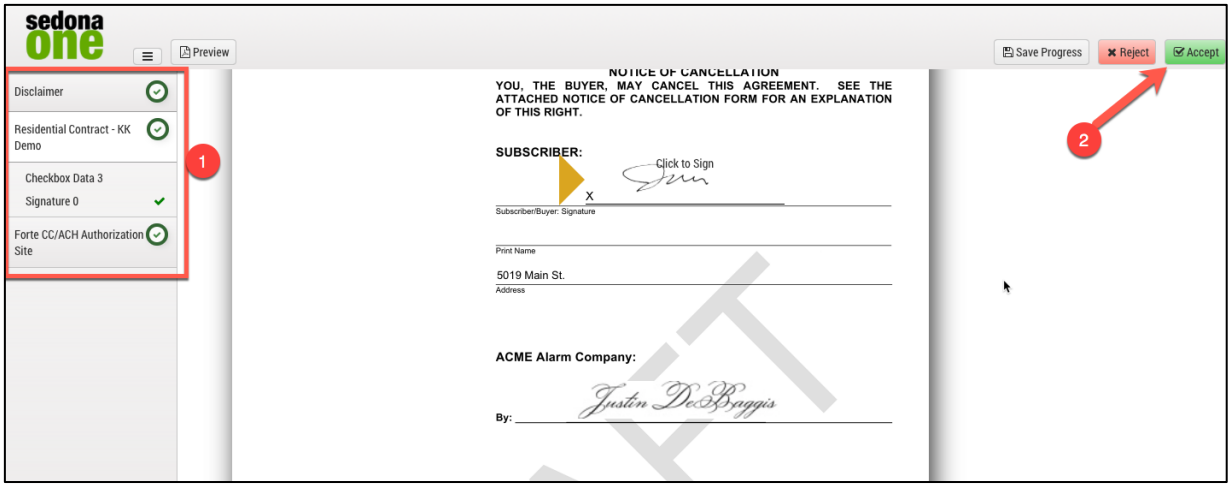


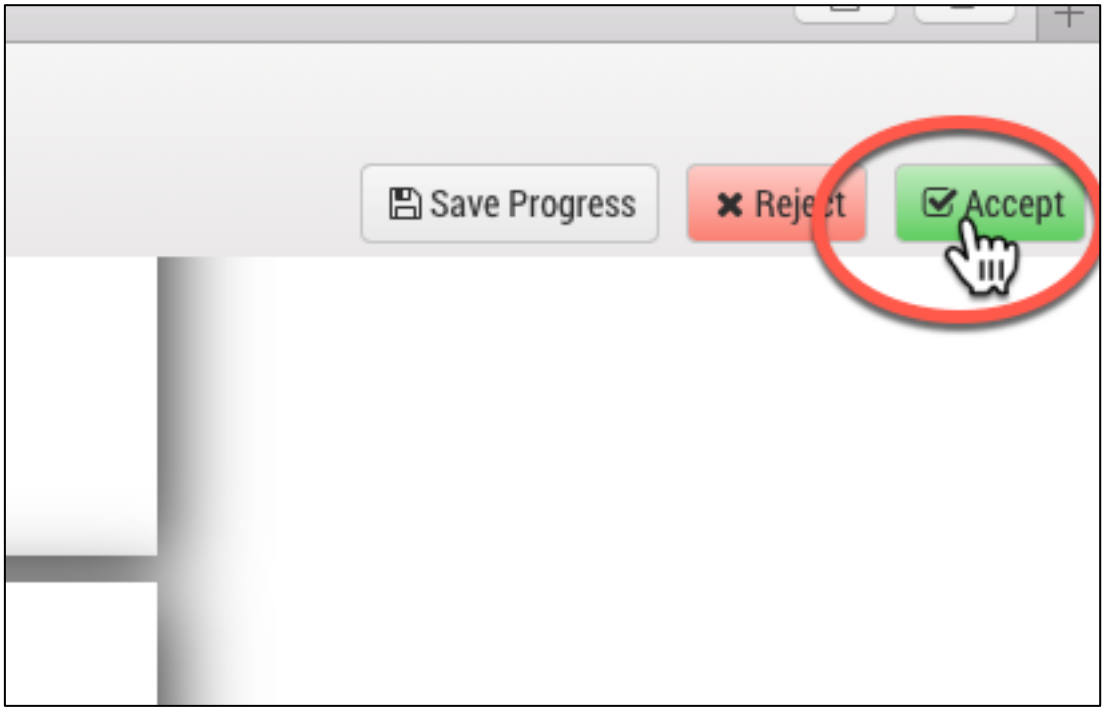
5. Click **Click to Sign** on the signature field.

6. Sign with finger/mouse or select **Use Font** to use a custom font for the signature.

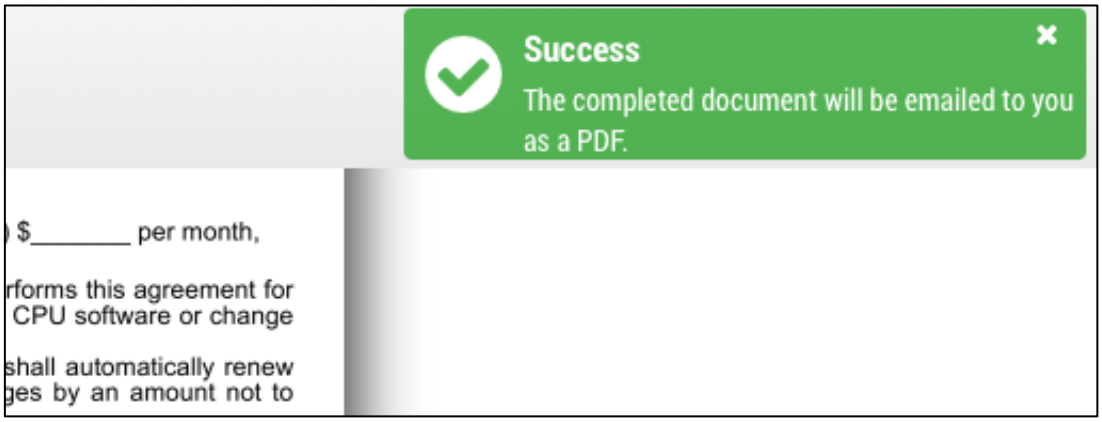


7. After all required fields are filled out a green **Accept** button will appear in the top right of the eForm.

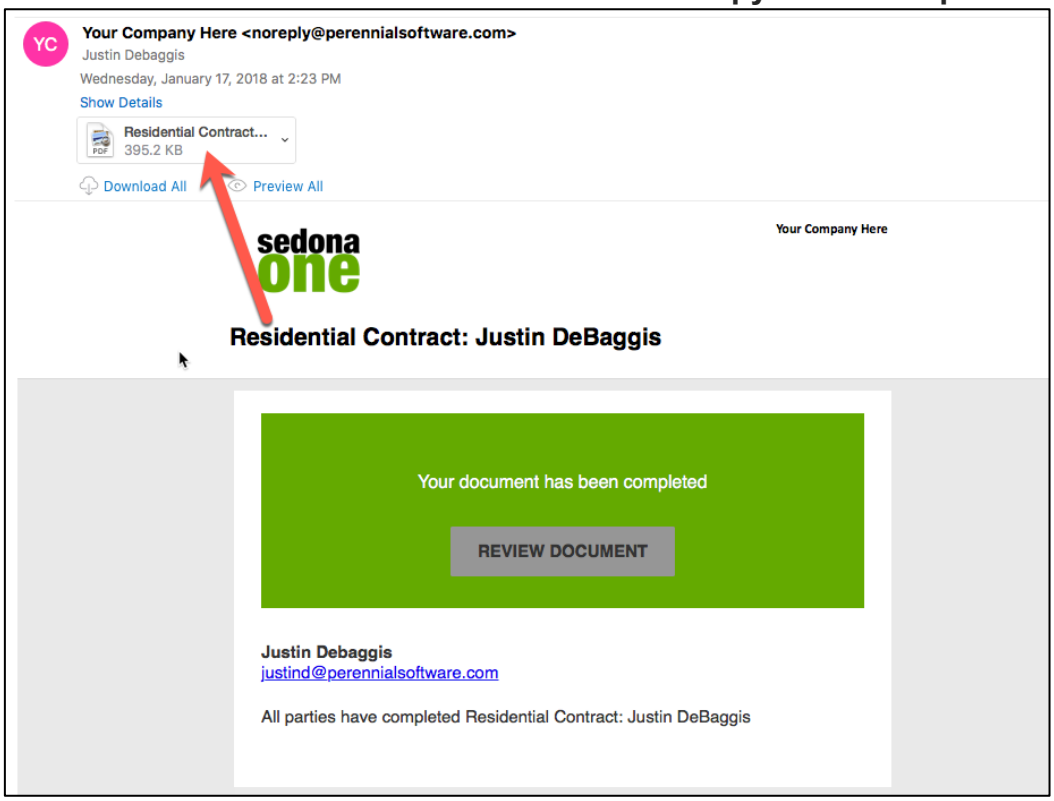




8. The completed document will be emailed to the recipient and sender.

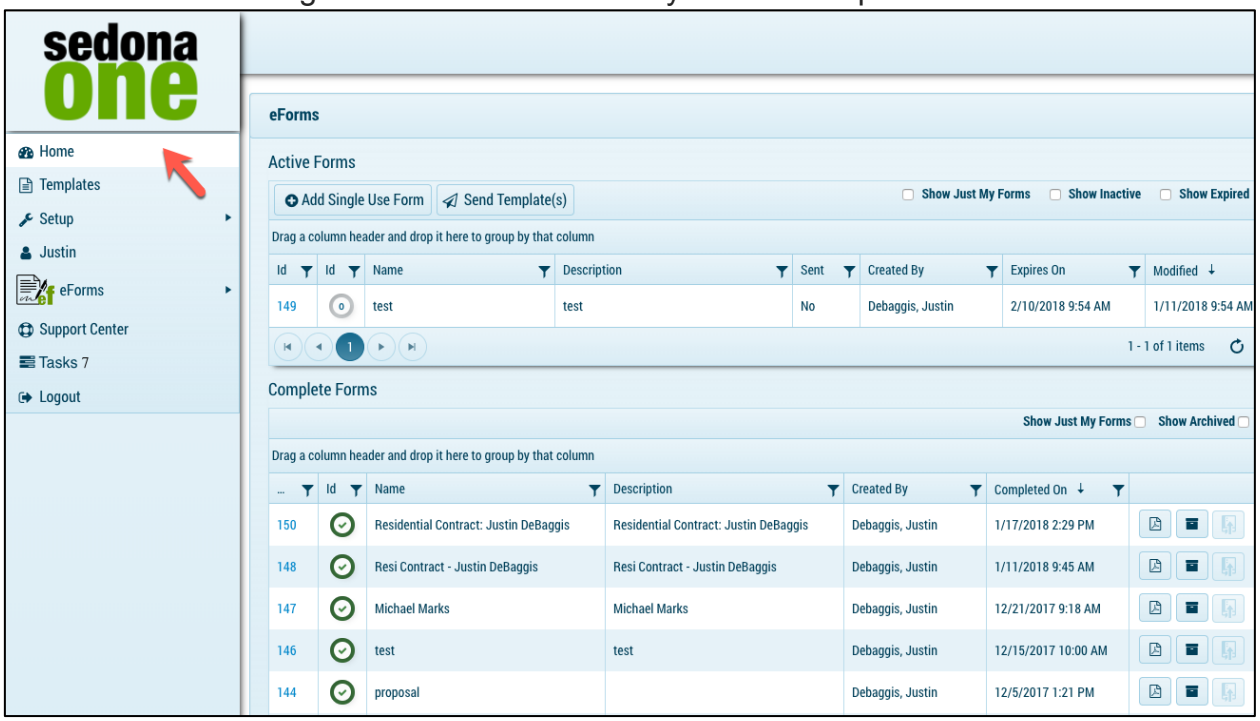


Important Note: After all stages and eForms are completed each recipient and sender will be notified with an email and PDF copy of the completed eForms.



Home

The **Home** screen is broken down into two main sections, active forms and complete forms. This view will allow the user to see forms that have been completed by customers and manage active forms that have yet to be completed.



Active Forms

Active forms are forms that I have sent to a recipient(s) and have not yet been 100% completed.

Active Forms Components

- **+Add Single Use Form:** This is used to send a one-off form that won't be saved as a template. For example: Sending a proposal for John Smith and you would like to send it out electronically.
- **Send Template:** One location to send templates from your template library.
- **Show Just My Forms:** If you are a manager and can view forms created by/delivered by other users, this filter will show only your forms.
- **Show Inactive:** Any forms that are deleted in the **Active Forms** are set as inactive.
- **Show Expired:** Any forms that are past the expired data are added to this queue.
- **Form ID:** 

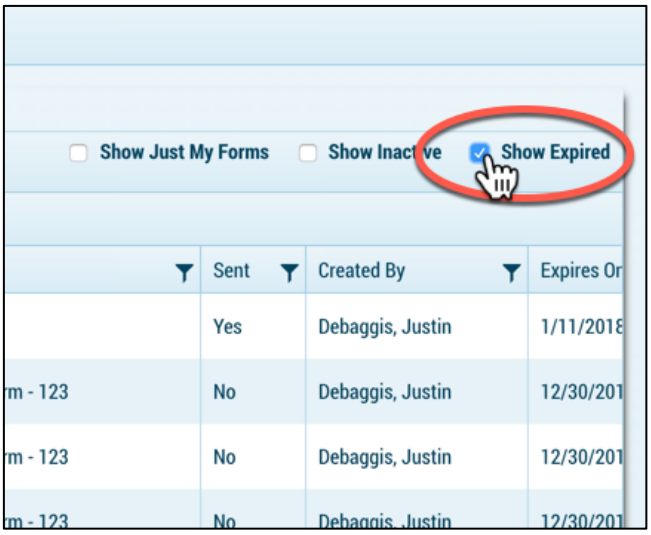
clicking this link will drill you into the eForm delivery setup for the selected form.
- **Edit:**  The edit button will allow you to edit the **Name** and **Description** of the form.

- **Delete:**  This will send the form to the inactive queue. To permanently delete check the inactive queue and delete.

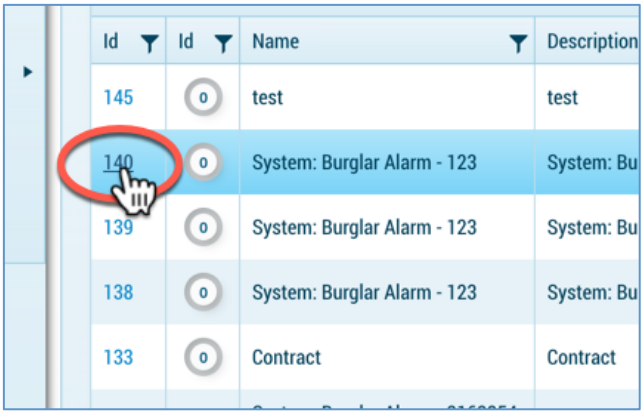
Change Expiration Date on Expired Form

1. Navigate to **Home** .

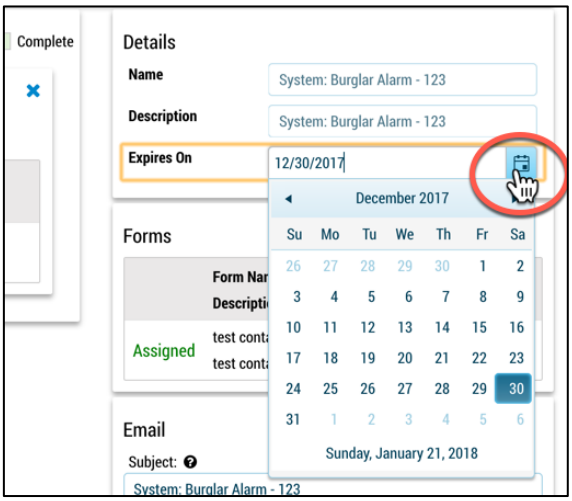
2. Select **Show Expired**.



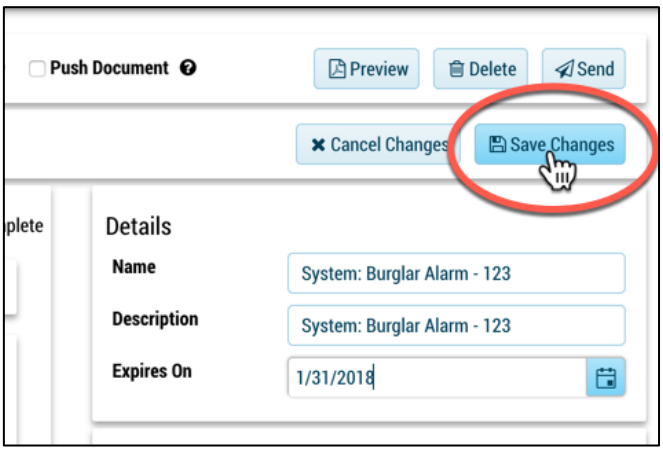
3. Click on the **ID** next to the form.



4. Click on the date icon in the **Details** section to change the date.



5. Select a future date.
6. Select **Save Changes**.



7. The form will now be moved to the **Active Forms** on the Home page.

Complete Forms

All eForms that have been 100% completed by all recipients and stages.

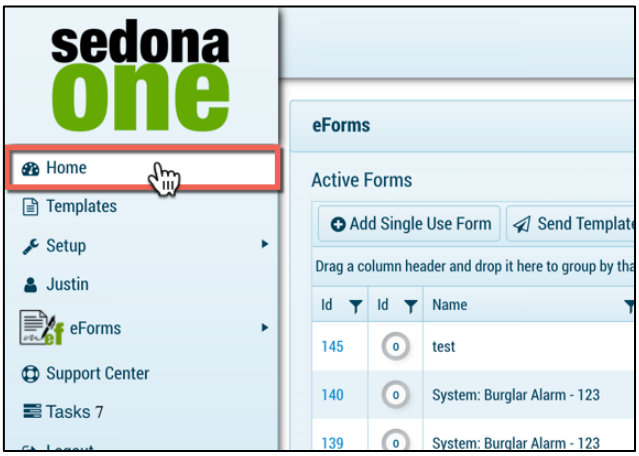
Complete Forms Components

- **Show Just My Forms:** If you are a manager and can view forms created by/delivered by other users, this filter will show only your forms.
- **Show Archived:** View all the archived forms that were completed and archived.
- **Archive:** Archive will take the completed form out of the **Complete Forms** section and send the document to the companies archived forms. eForms in the archive will exist in this database for the forever.
- **Push Document:**  Clicking the push document Icon next to your completed form will push the completed document to SedonaDocs. If the button is greyed out, either the template was not integrated or the document was already pushed.
- **Download PDF:**  To view the PDF copy of the completed form select the download PDF button next to the completed form.
- **Form ID:** 

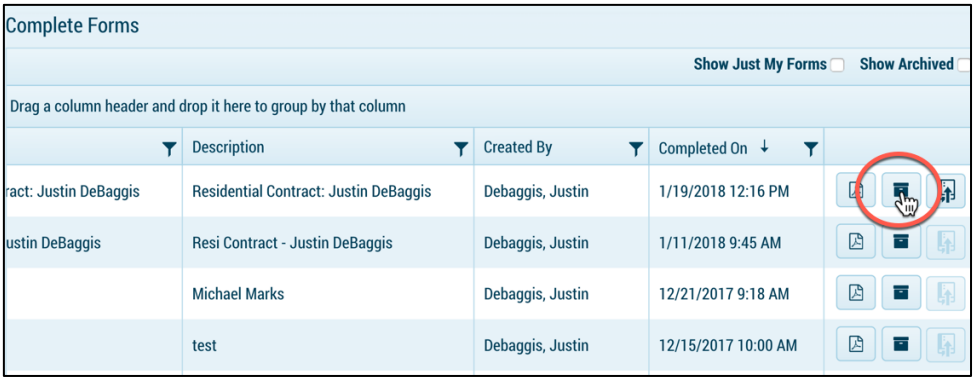
Clicking this link will drill you into the eForm delivery setup for the selected form. From here you can download the completed eForm and Signing Certificate.

Archive Documents

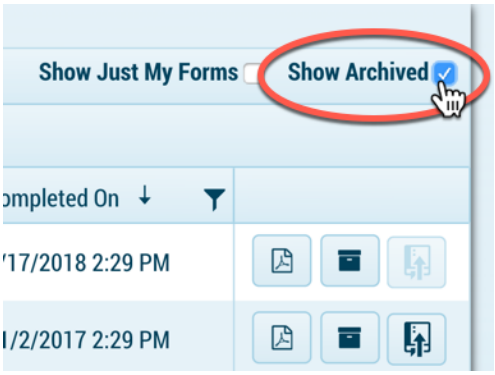
1. Navigate to the **Complete Forms** on the **Home** page.



2. Select the appropriate form.
3. Click the archive button.

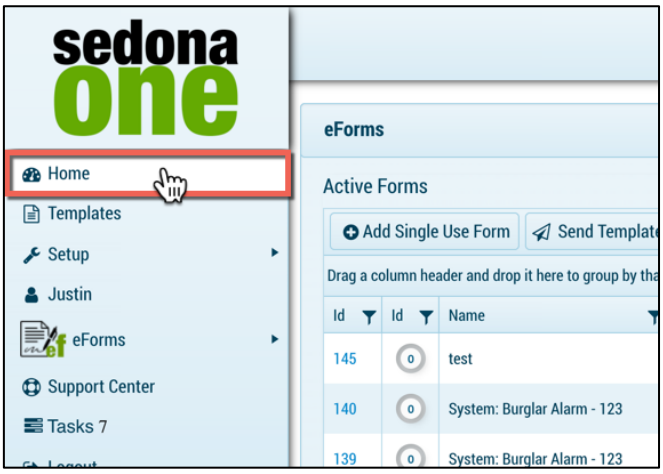


4. To view the archived documents select **Show Archived**.

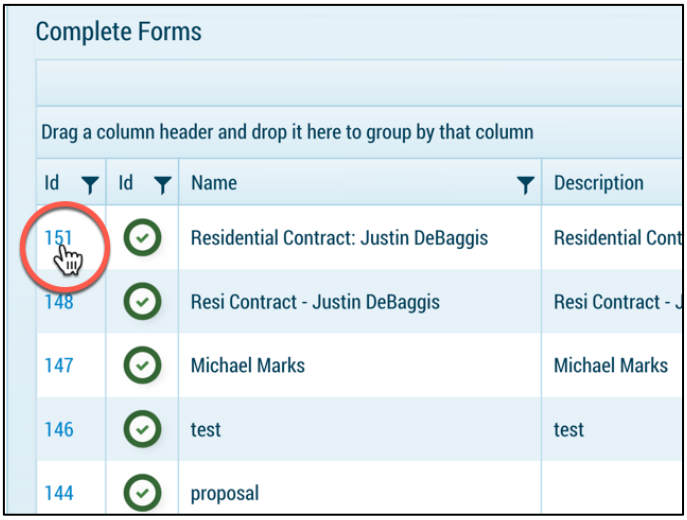


Download Completed Form and Signing Certificate

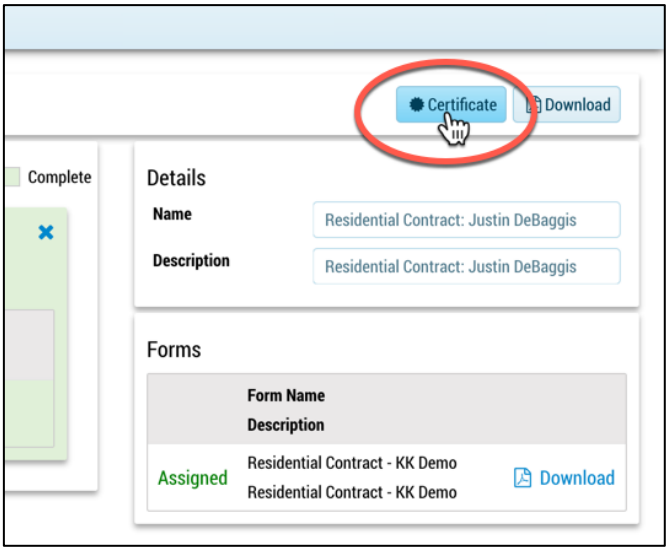
1. Navigate to the **Home** page.



2. Navigate to the **Complete Forms**.
3. Click on the form **ID**.



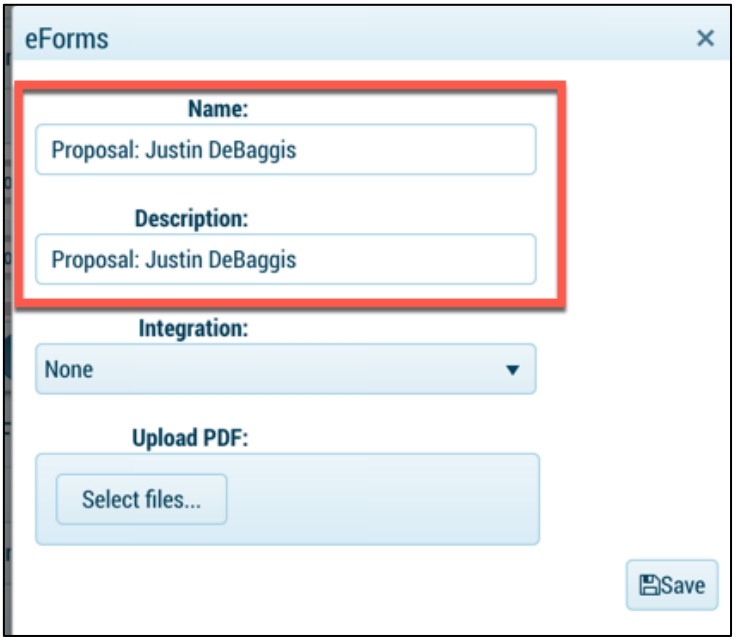
4. Select **Certificate** (signing certificate) and **Download** (completed eForms).



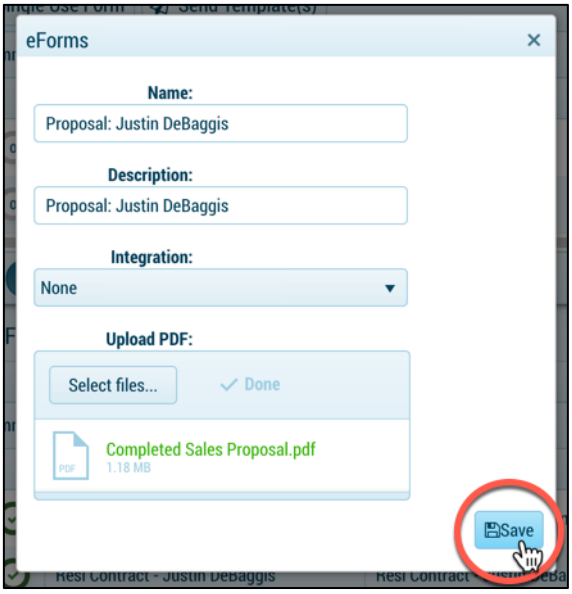
Add Single Use Form

1. Navigate to the **Home** screen.
2. Select **+Add Single User Form**.

3. Enter **Name** and **Description**.



4. Select Integration SedonaOffice (only if you want to integrate see [SedonaOffice Integration])
5. If integration selected, pick a data type
6. Upload a PDF or leave blank to use the WYSIWIG Editor
7. Select **Save**.



8. Follow steps outlined in Design Mode and Delivery Mode.