



SedonaOffice Users Conference
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SedonaOne eForms

Presented by:
Michael Marks & Justin DeBaggis

PERENNIAL SOFTWARE

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eForms Overview

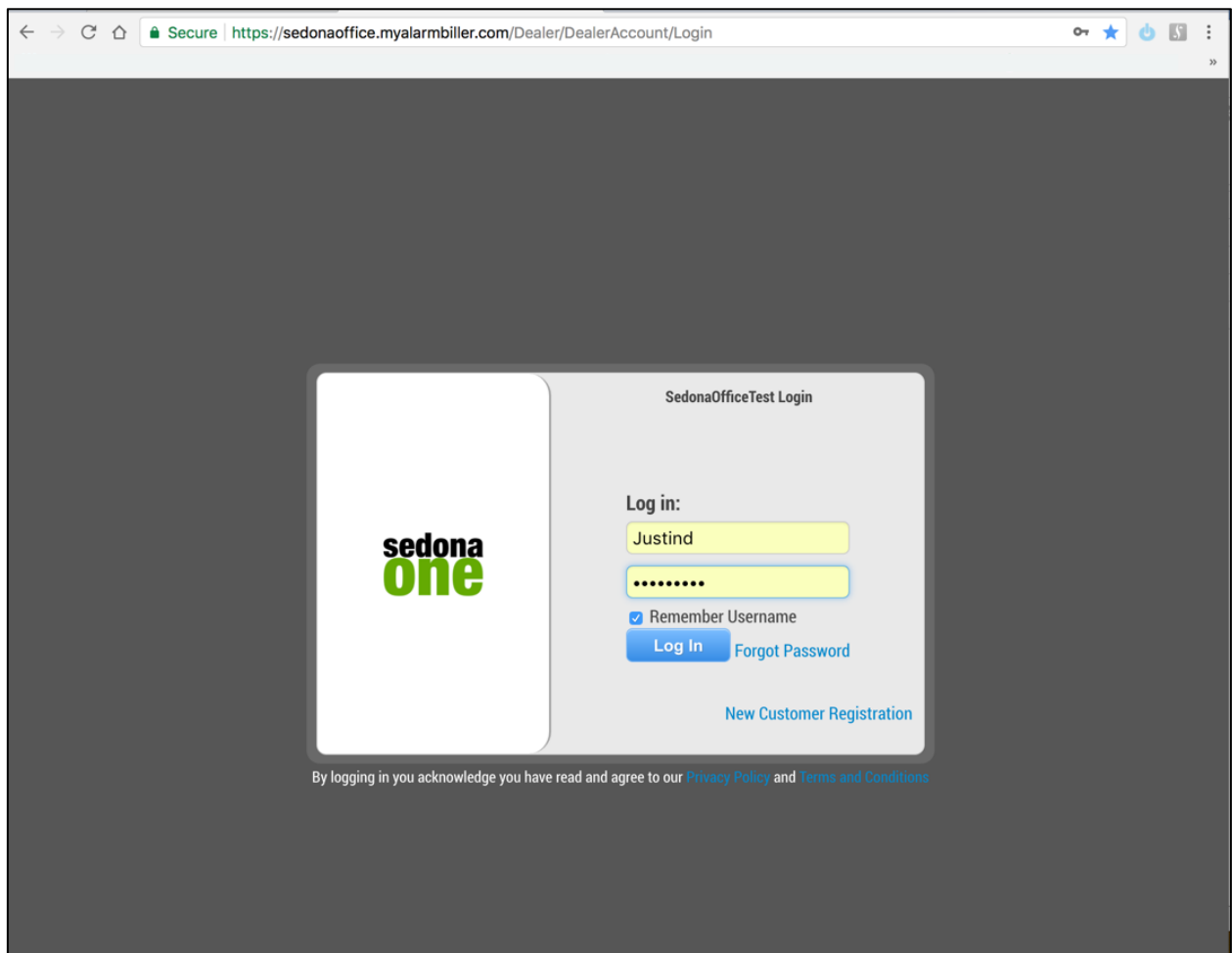
eForms application provides you with a user-friendly interface for the creation and delivery of e-documents and capturing of e-signatures. Access anytime, anywhere on any device using the cloud based application to replace all manual paper processes. eForms helps your business go digital at a time when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

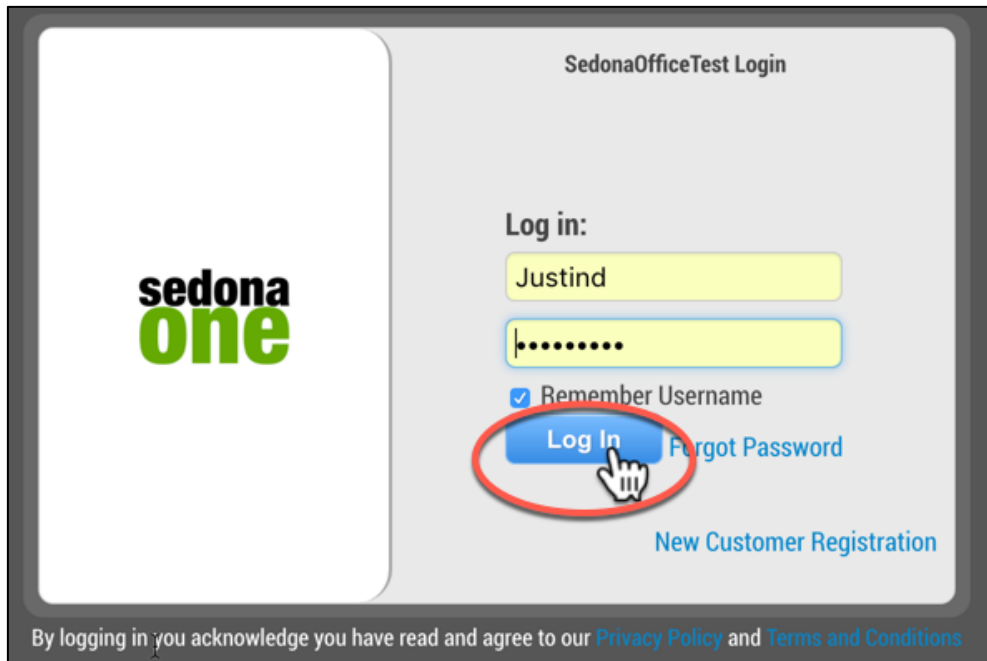
When first launching eForms you will receive credentials for your company from the SedonaOne staff. You will receive a custom URL, username and default login. Below is the 3-step process to login successfully:

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:



The screenshot shows a web browser window with the address bar displaying "Secure https://sedonaoffice.mylarmbiller.com/Dealer/DealerAccount/Login". The main content area features a login form titled "SedonaOfficeTest Login". On the left side of the form is the SedonaOne logo. The login section includes a "Log in:" label, a username input field containing "Justind", a password input field with masked characters "*****", a checked "Remember Username" checkbox, a blue "Log In" button, and a "Forgot Password" link. Below the login fields is a "New Customer Registration" link. At the bottom of the form, a small text line reads: "By logging in you acknowledge you have read and agree to our [Privacy Policy](#) and [Terms and Conditions](#)".

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.



The image shows the 'SedonaOfficeTest Login' interface. On the left is the 'sedona one' logo. On the right, under 'Log in:', there is a username field containing 'Justind', a password field with masked characters, and a checked 'Remember Username' checkbox. A red circle highlights the 'Log In' button, with a hand cursor pointing at it. To the right of the 'Log In' button is a 'Forgot Password' link. Below these is a 'New Customer Registration' link. At the bottom, a disclaimer states: 'By logging in you acknowledge you have read and agree to our [Privacy Policy](#) and [Terms and Conditions](#)'.

- 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.



The image shows the 'SedonaOne eForms' application interface. On the left is a 'Navigation Tabs' sidebar with links: Home (selected), Templates, Setup, Justin, eForms, Support Center, Tasks 7, and Logout. The main area is titled 'eForms' and contains two sections: 'Active Forms' and 'Complete Forms'. Both sections have a table of forms with columns: Id, Name, Description, Sent, Created By, Expires On, and Modified. The 'Active Forms' section shows one form with Id 149. The 'Complete Forms' section shows a list of completed forms, including 'Residential Contract' and 'Proposal'.

Active Forms						
Drag a column header and drop it here to group by that column						
Id	Name	Description	Sent	Created By	Expires On	Modified
149	test	test	No	Debaggis, Justin	2/10/2018 9:54 AM	1/11/2018 9:54 AM

Complete Forms						
Drag a column header and drop it here to group by that column						
Id	Name	Description	Created By	Completed On		
150	Residential Contract: Justin Debaggis	Residential Contract: Justin Debaggis	Debaggis, Justin	1/17/2018 2:29 PM		
148	Resi Contract - Justin Debaggis	Resi Contract - Justin Debaggis	Debaggis, Justin	1/11/2018 9:45 AM		
147	Michael Marks	Michael Marks	Debaggis, Justin	12/21/2017 9:18 AM		
146	test	test	Debaggis, Justin	12/15/2017 10:00 AM		
144	proposal		Debaggis, Justin	12/5/2017 1:21 PM		
143	contract: Michael Marks	contract: Michael Marks	Debaggis, Justin	12/5/2017 1:16 PM		
142	Codecraft sign	Codecraft sign	Papay, Travis	12/5/2017 9:39 AM		
137	test	test	Debaggis, Justin	11/27/2017 9:56 AM		
136	test	test	Debaggis, Justin	11/20/2017 10:19 AM		
135	Proposal		Debaggis, Justin	11/2/2017 2:37 PM		

Navigation Tabs

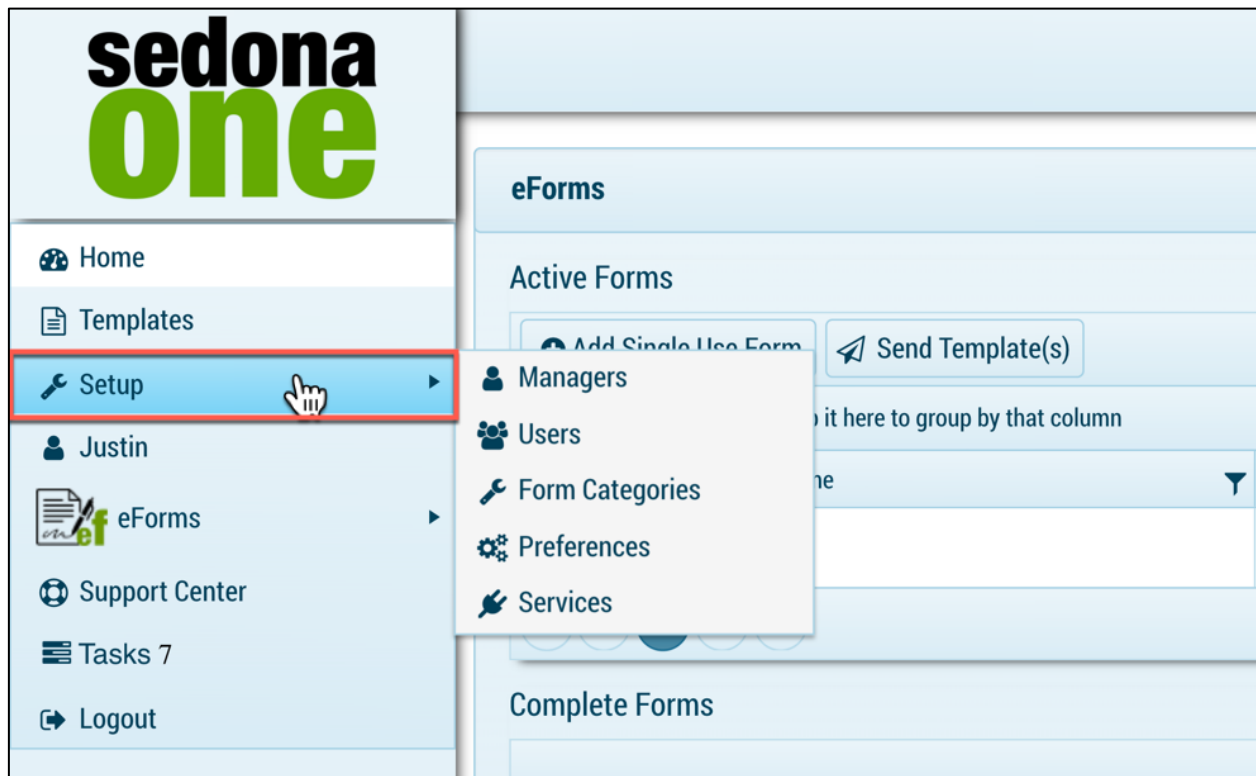
These tabs are used to access different functions in eForms.

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.



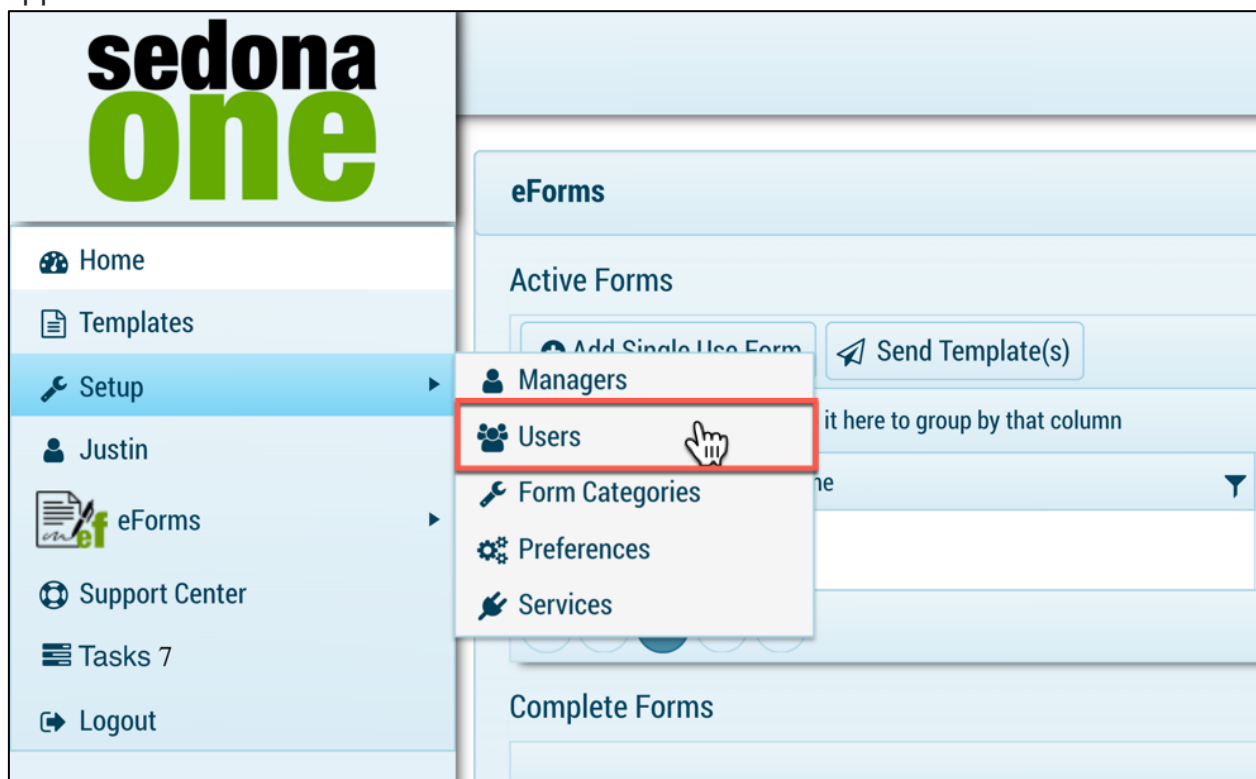
Setup Components

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.

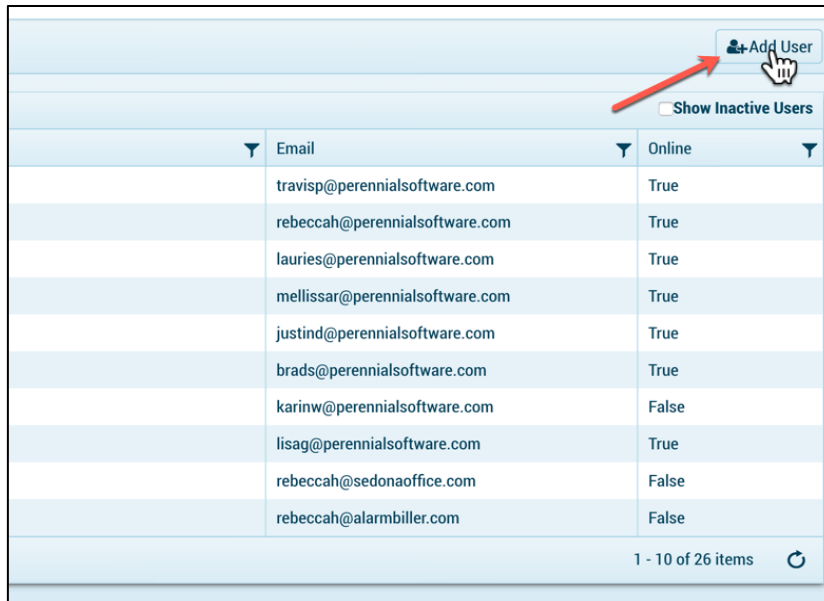
Users

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

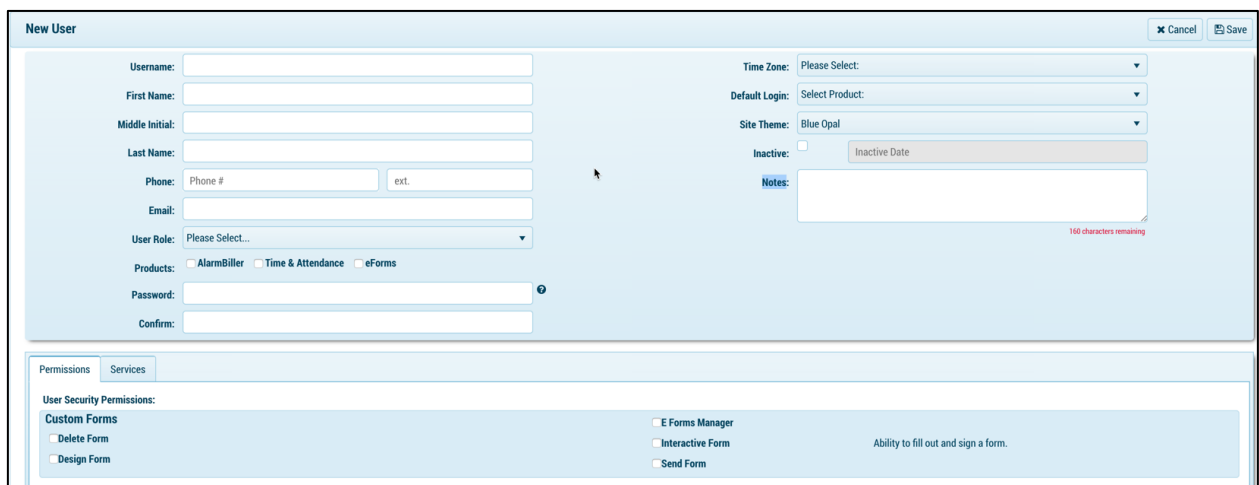
1. Navigate to **Setup > Users** as shown in the figure above.
2. Select + Add User.



Email	Online
travisp@perennialsoftware.com	True
rebeccah@perennialsoftware.com	True
lauries@perennialsoftware.com	True
mellissar@perennialsoftware.com	True
justind@perennialsoftware.com	True
brads@perennialsoftware.com	True
karinw@perennialsoftware.com	False
lisag@perennialsoftware.com	True
rebeccah@sedonaoffice.com	False
rebeccah@alarmbiller.com	False

1 - 10 of 26 items

3. Fill out the following fields:



New User

Username:

First Name:

Middle Initial:

Last Name:

Phone: Phone # ext.

Email:

User Role:

Products: ☐ AlarmBiller ☐ Time & Attendance ☐ eForms

Password:

Confirm:

Time Zone:

Default Login:

Site Theme:

Inactive: ☐

Inactive Date:

Notes:

100 characters remaining

Permissions Services

User Security Permissions:

Custom Forms

☐ Delete Form

☐ Design Form

☐ E Forms Manager

☐ Interactive Form

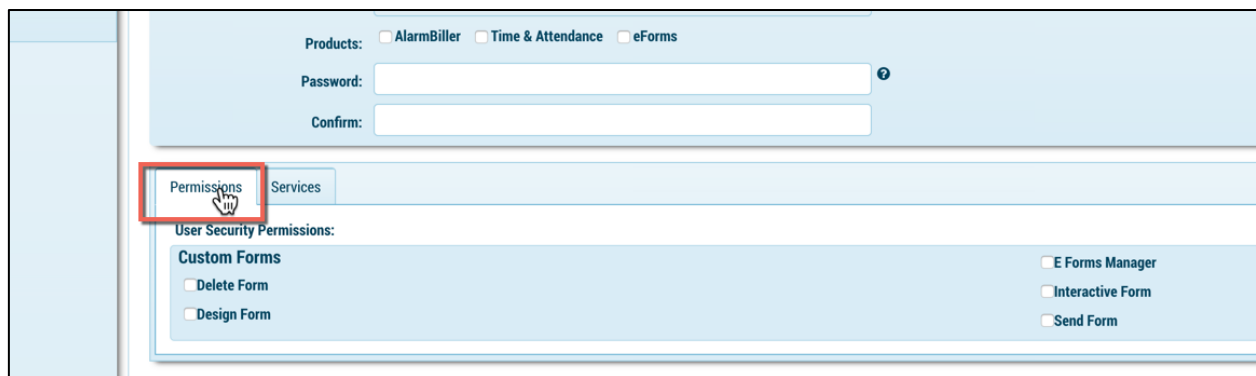
☐ Send Form

Ability to fill out and sign a form.

- **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



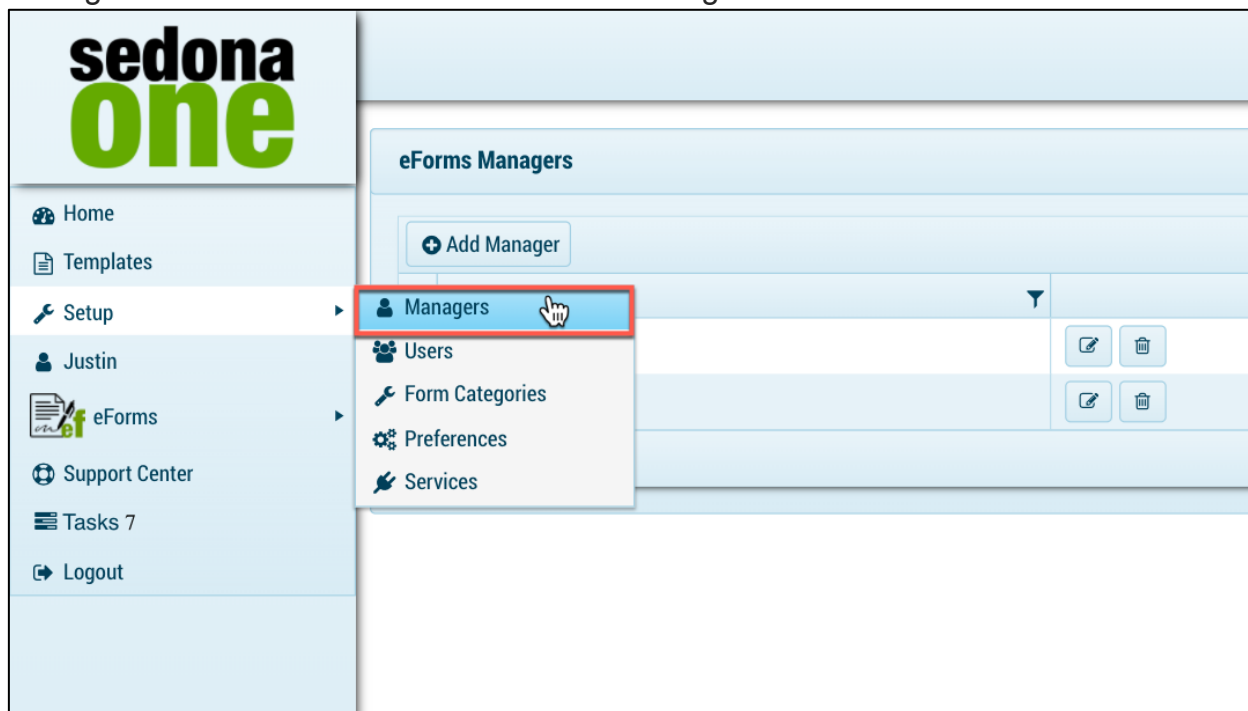
The screenshot shows the 'User Security Permissions' form. At the top, there are checkboxes for 'Products': AlarmBiller, Time & Attendance, and eForms. Below these are 'Password' and 'Confirm' input fields. A red box highlights the 'Permissions' tab, which is selected. Under the 'Permissions' tab, there are two sections: 'Custom Forms' and 'User Security Permissions'. The 'Custom Forms' section has checkboxes for 'Delete Form' and 'Design Form'. The 'User Security Permissions' section has checkboxes for 'E Forms Manager', 'Interactive Form', and 'Send Form'.

- **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.

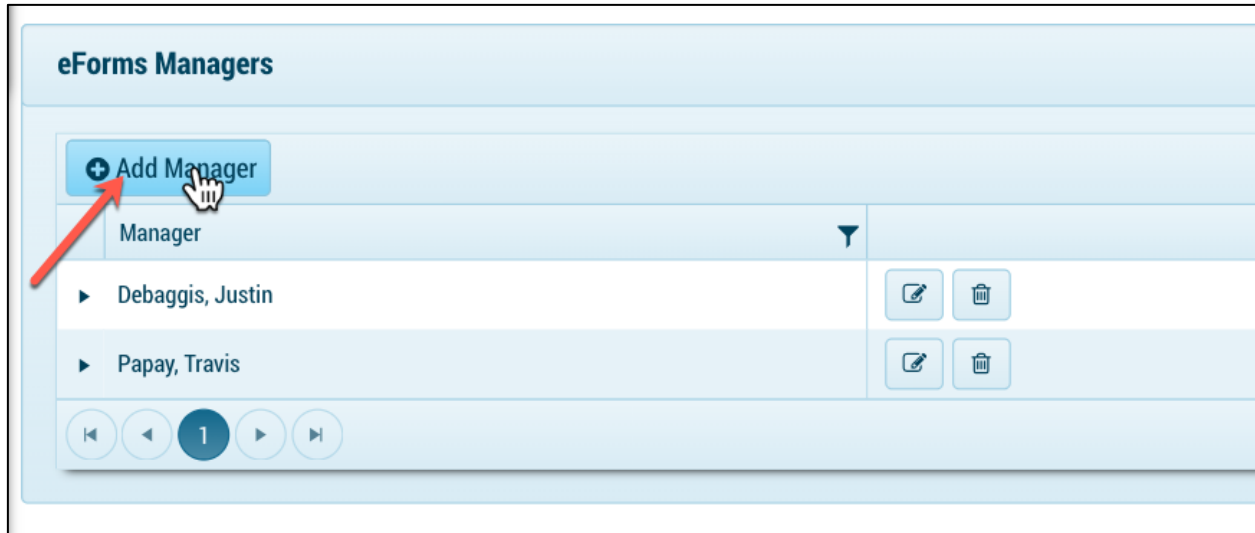
Managers

A manager role must be checked 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.

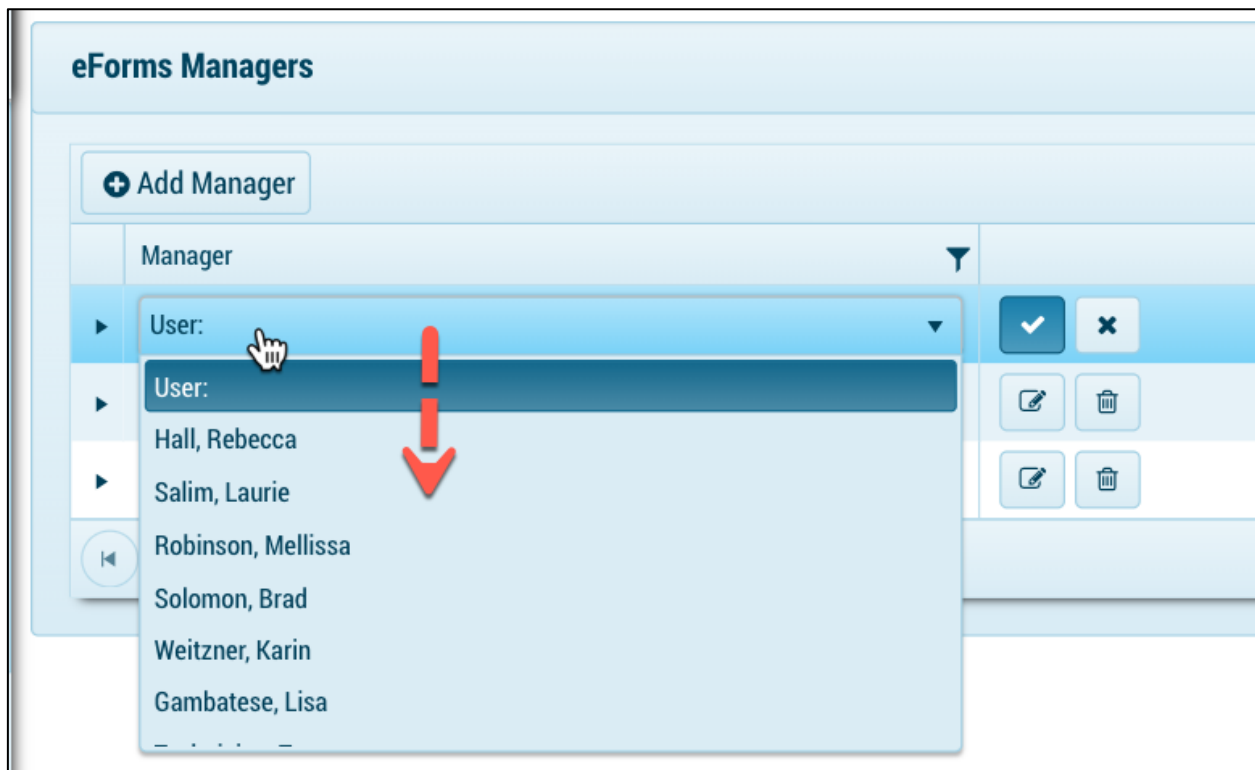


Add a Manager

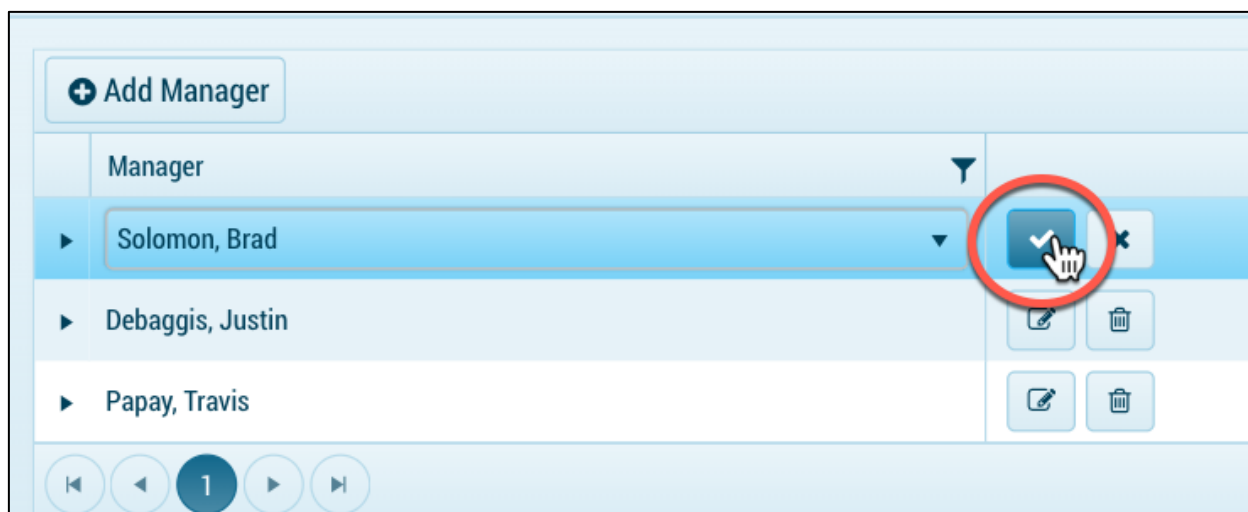
1. Navigate to **Setup > Managers**.
2. Select +Add Manager.



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

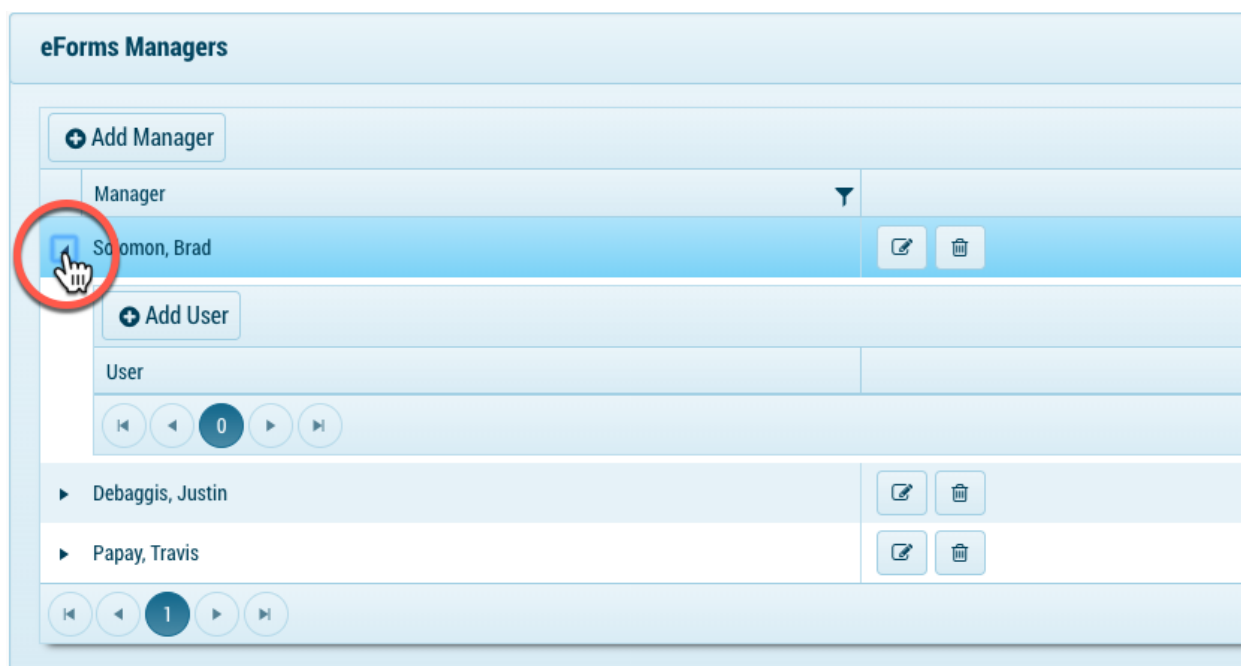


4. Select the  icon.

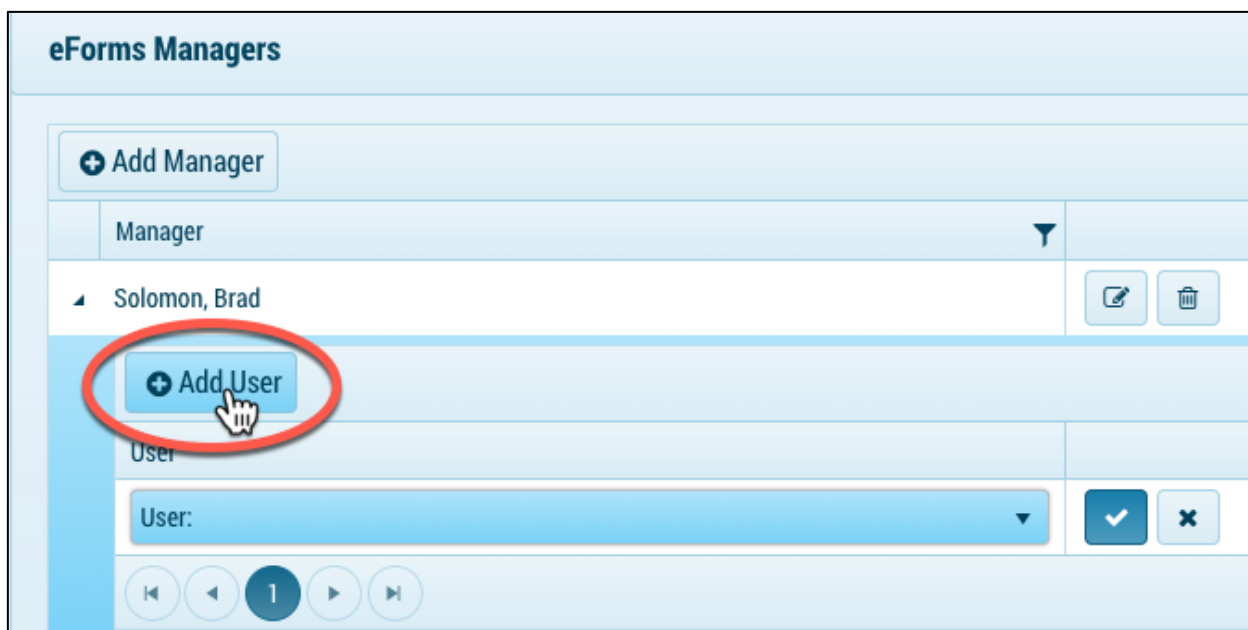


Assign a User to a Manager

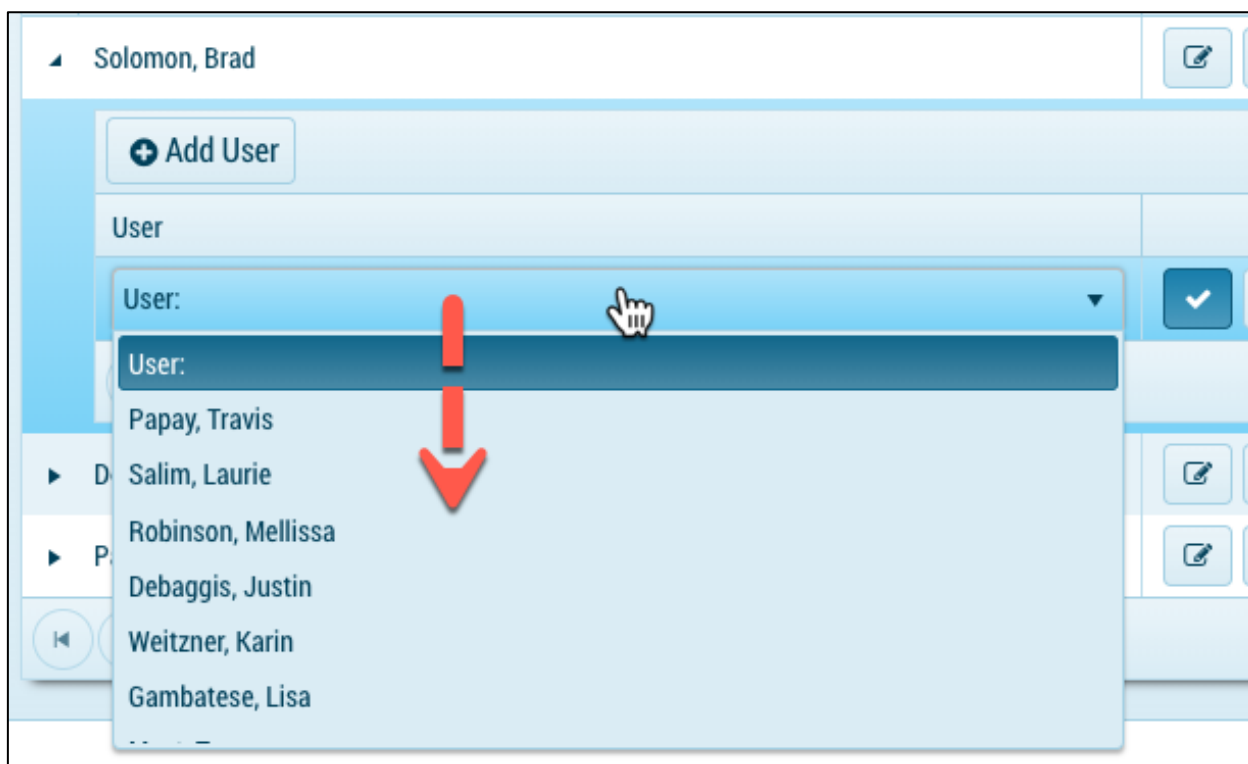
1. Navigate to **Setup > Managers**.
2. Select the drop-down section next to the manager you would like to assign users.



3. Select +Add User.



4. Select the appropriate user.



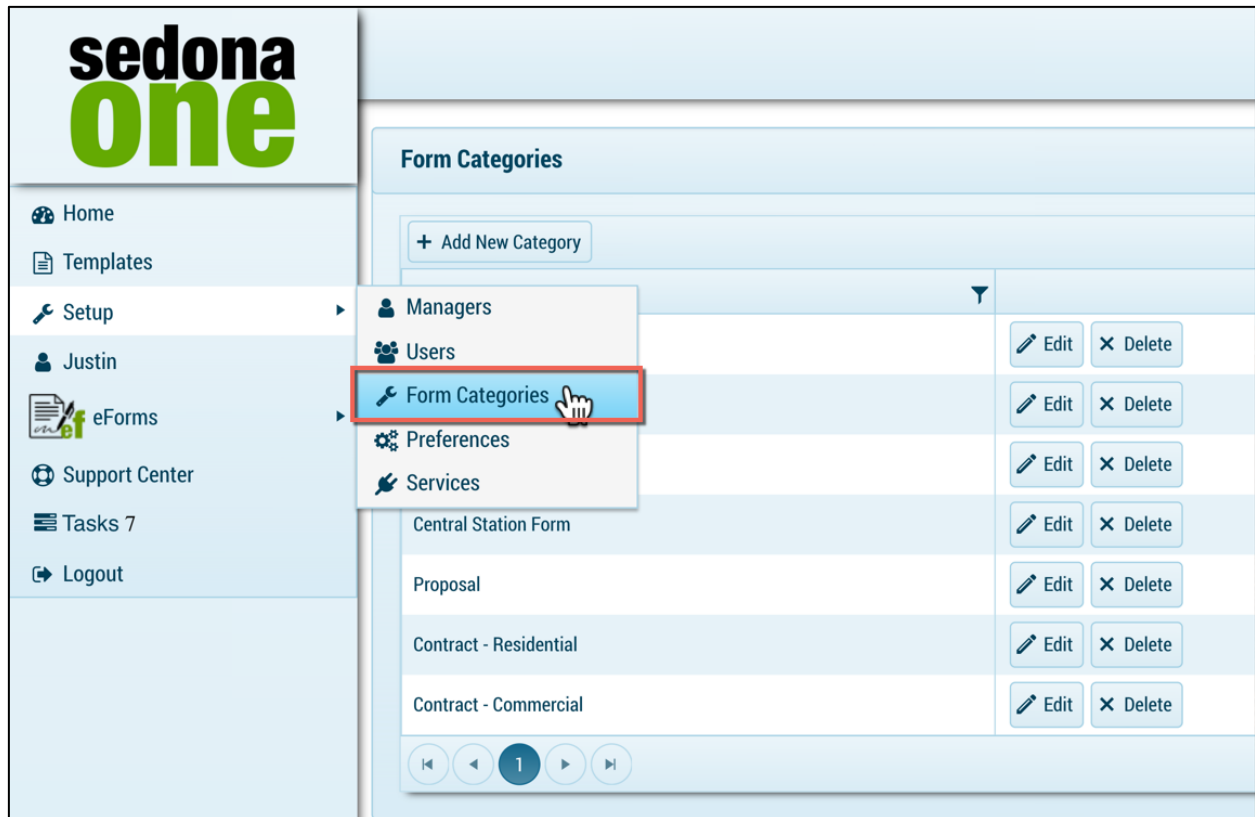
5. Select the  icon.

The screenshot displays the 'eForms Managers' interface. At the top, there is a header 'eForms Managers'. Below it, a section titled 'Add Manager' contains a table with one row for 'Solomon, Brad'. To the right of this row are icons for editing and deleting. Below the manager section, there is a section titled 'Add User' with a table for 'Weitzner, Karin'. A red circle highlights a checkmark icon in the rightmost column of the 'Add User' table, indicating the action to assign the user to the manager. At the bottom of the interface, there are navigation buttons: a left arrow, a right arrow, a button with the number '1', and another right arrow.

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

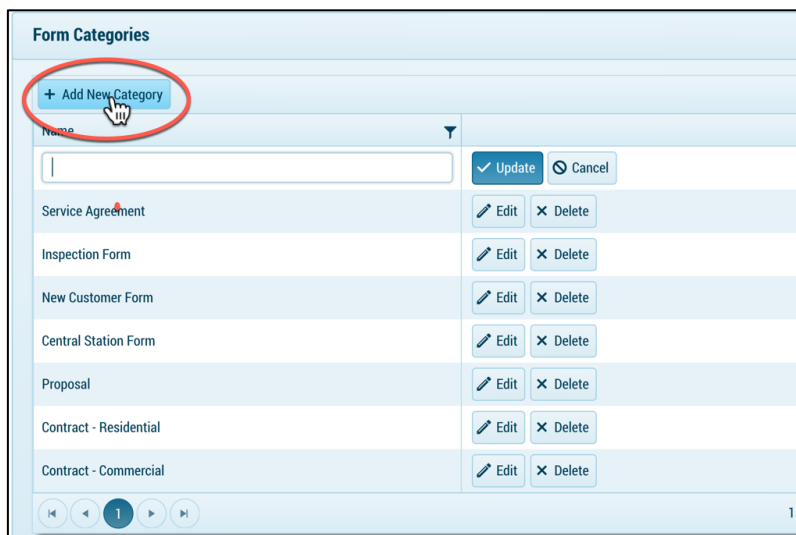
Form Categories

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.

Form Categories

+ Add New Category

Name 

Service Agreement	 Edit	 Delete
Inspection Form	 Edit	 Delete
New Customer Form	 Edit	 Delete
Central Station Form	 Edit	 Delete
Proposal	 Edit	 Delete
Contract - Residential	 Edit	 Delete
Contract - Commercial	 Edit	 Delete

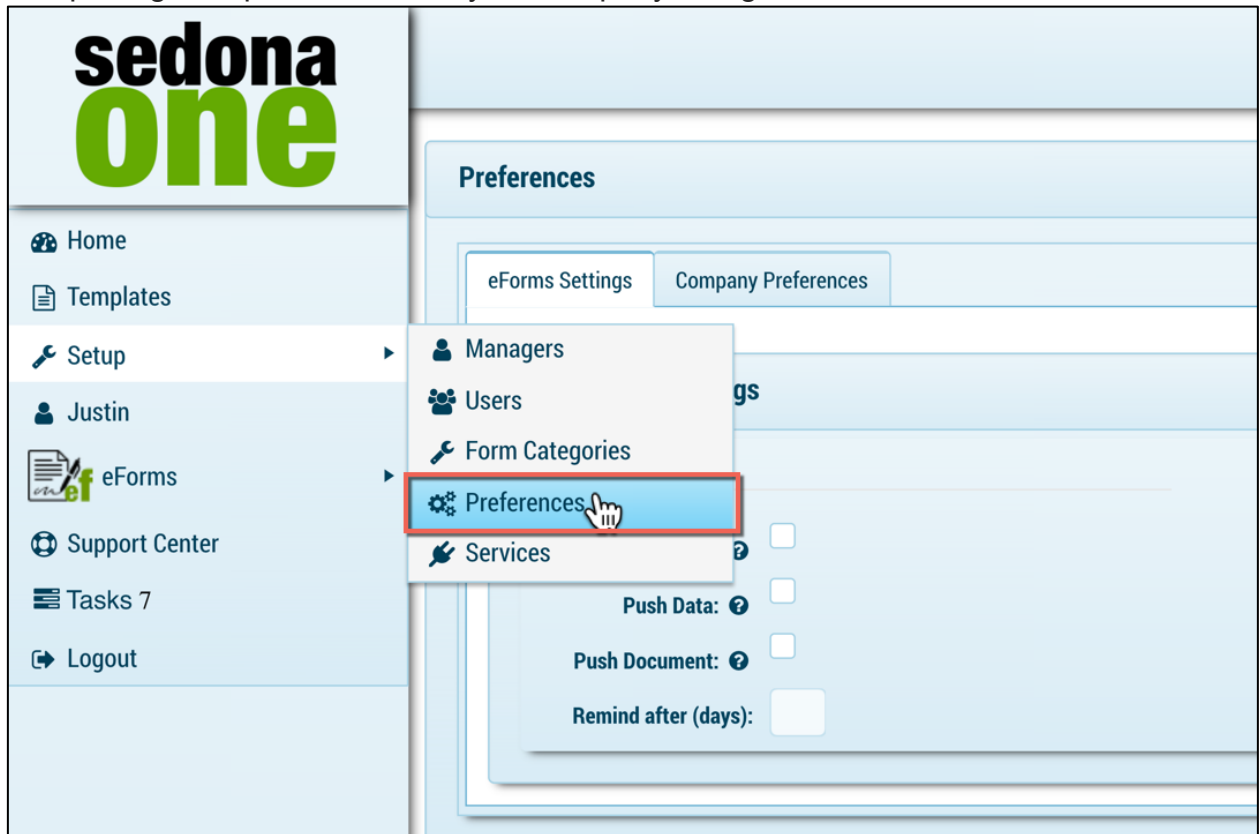
  1  

1 -

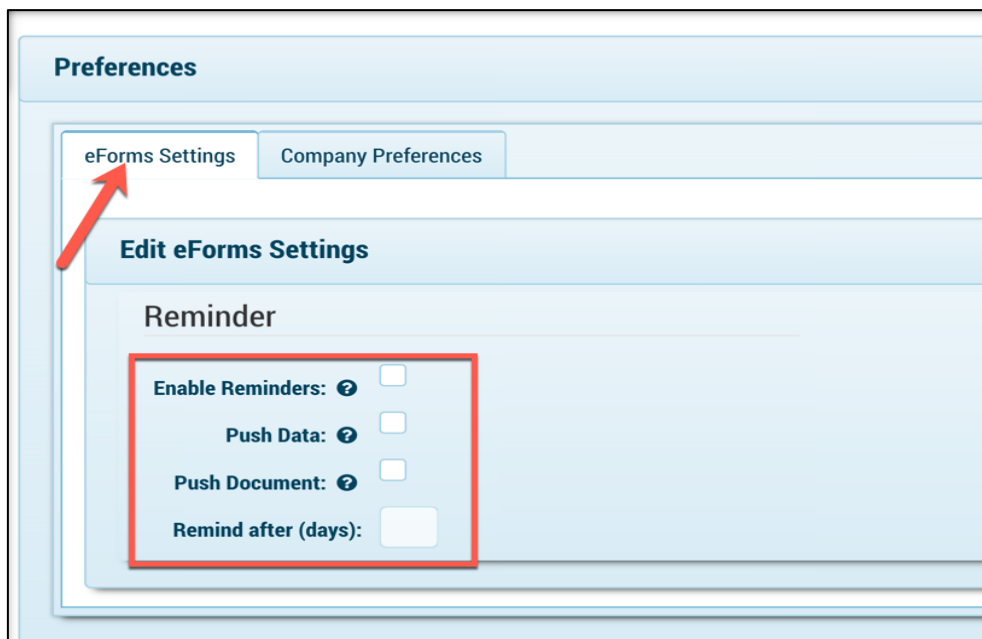
4. Select **Update** to add the new category.

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

The screenshot shows the 'Company Preferences' form in the SedonaOne eForms interface. The form is titled 'Edit Company Info' and has a 'Save' button in the top right corner. A red arrow points to the 'Company Preferences' tab. The form includes the following fields:

- Address:** 14785 Mulberry Rd.
- Address 2:**
- City:** Willoughby
- State:** Ohio
- Zip:** 44094
- Phone:** (440) 247-5602 ext.
- Phone 2:** (440) 247-5602 ext.
- Logo:** Select files...
- Logo Preview:** sedona one

- **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.

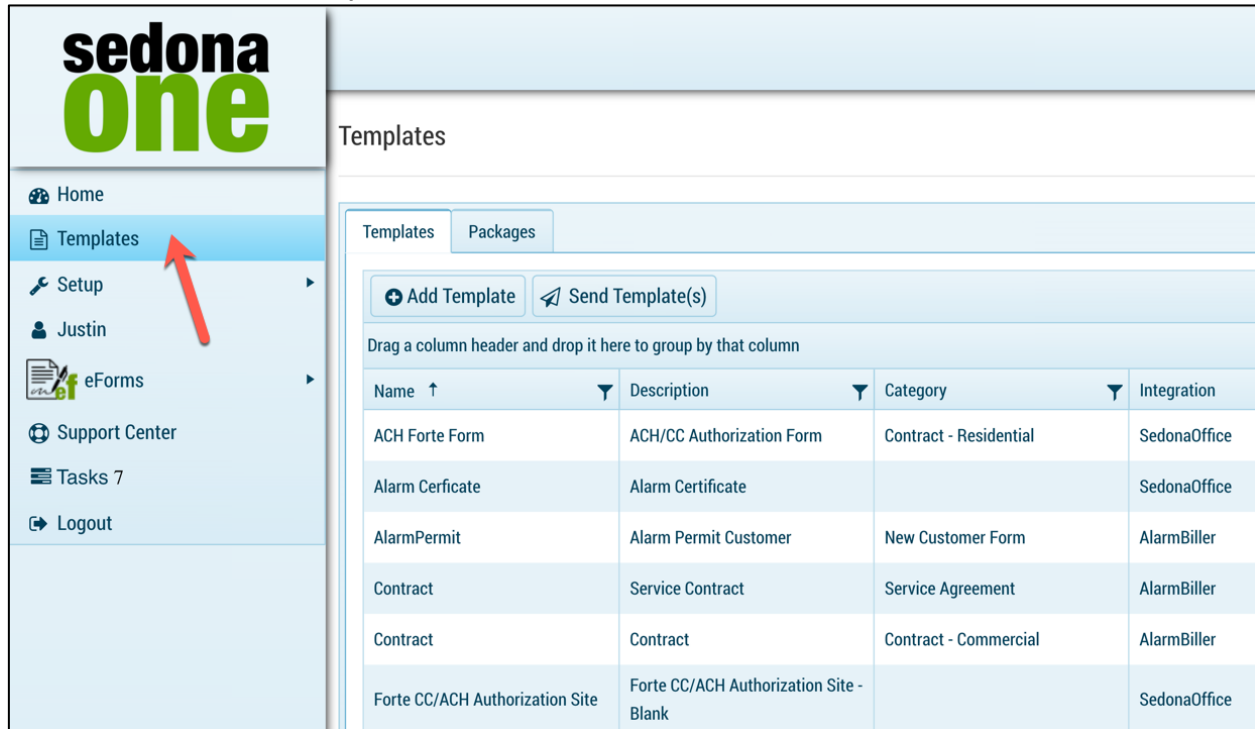
Note: Select save after any changes.

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.



sedona one

Home
Templates
 Setup
 Justin
 eForms
 Support Center
 Tasks 7
 Logout

Templates

Templates Packages

+ Add Template Send Template(s)

Drag a column header and drop it here to group by that column

Name ↑	Description	Category	Integration
ACH Forte Form	ACH/CC Authorization Form	Contract - Residential	SedonaOffice
Alarm Certificate	Alarm Certificate		SedonaOffice
AlarmPermit	Alarm Permit Customer	New Customer Form	AlarmBiller
Contract	Service Contract	Service Agreement	AlarmBiller
Contract	Contract	Contract - Commercial	AlarmBiller
Forte CC/ACH Authorization Site	Forte CC/ACH Authorization Site - Blank		SedonaOffice

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

Templates Packages

+ Add Template Send Template(s) Show Inactive

Drag a column header and drop it here to group by that column

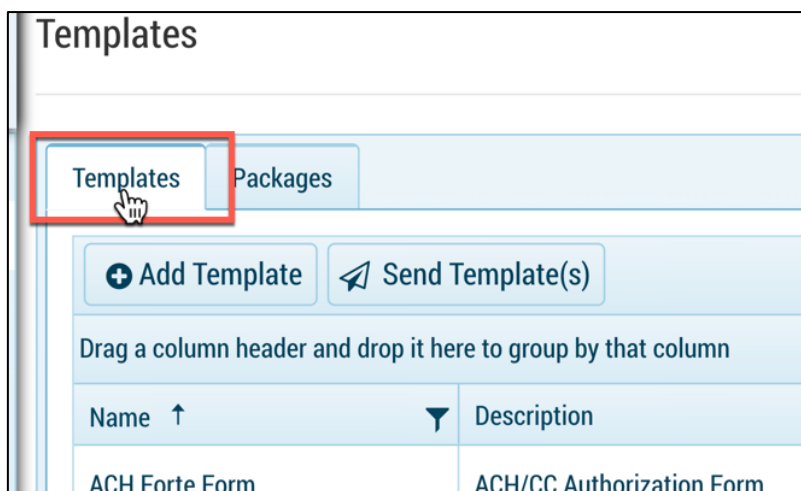
Name ↑	Description	Category	Integration	Data Type
ACH Forte Form	ACH/CC Authorization Form	Contract - Residential	SedonaOffice	Customer
Alarm Certificate	Alarm Certificate		SedonaOffice	Site
AlarmPermit	Alarm Permit Customer	New Customer Form	AlarmBiller	Customer
Contract	Service Contract	Service Agreement	AlarmBiller	Proposal
Contract	Contract	Contract - Commercial	AlarmBiller	Proposal
Forte CC/ACH Authorization Site	Forte CC/ACH Authorization Site - Blank		SedonaOffice	Site
Proposal	Proposal		AlarmBiller	Proposal
Residential Contract - KK Demo	Residential Contract - KK Demo	Contract - Residential	SedonaOffice	Site

Templates Tab Fields

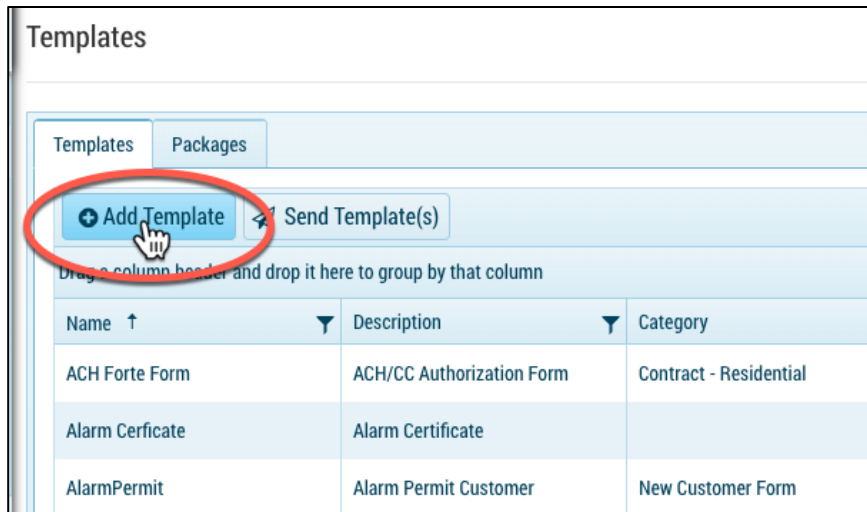
- **+ Add Template:** Select this button to add a new template.
- **Send Template:** Select to send a template electronically.
- **Name:** Name that was entered by the user to identify the template e.g. All-in-One Contract. When selecting a template to send the drop-down list will show the name of the 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.

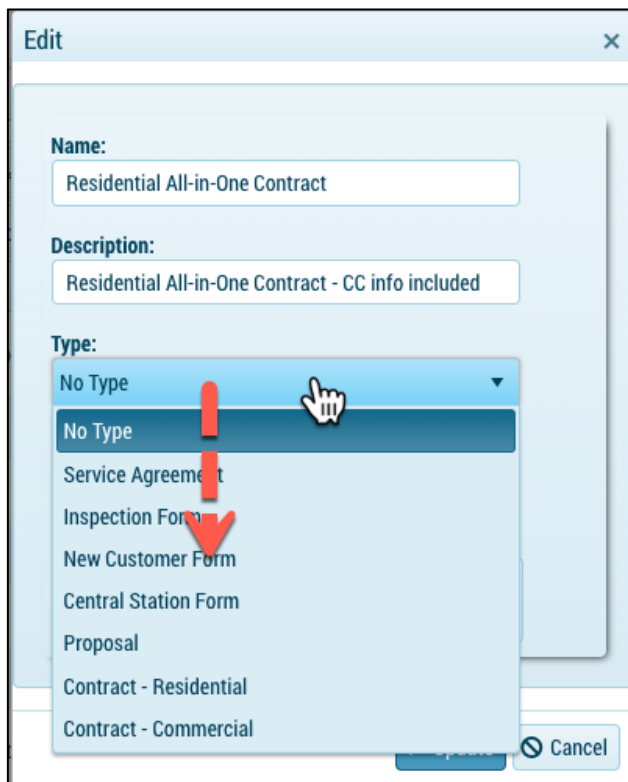


3. Enter in the name and description

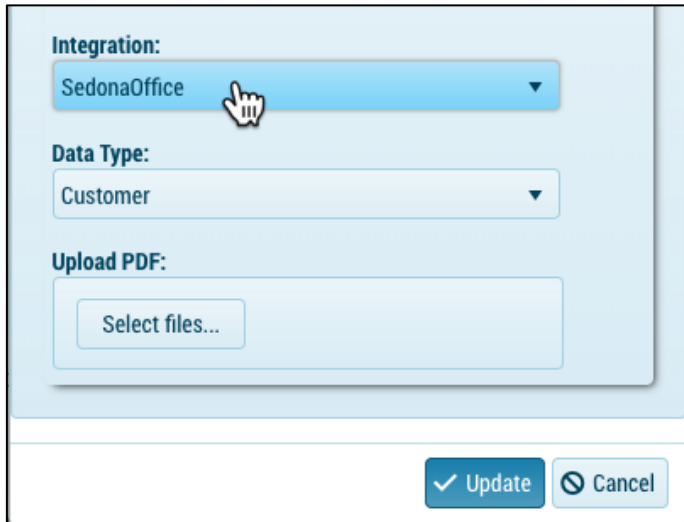
- **Name:** Name of your template (Residential All-in-One Contract)
- **Description:** Description of your template may be the same as the name or more detailed description of the form.

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).

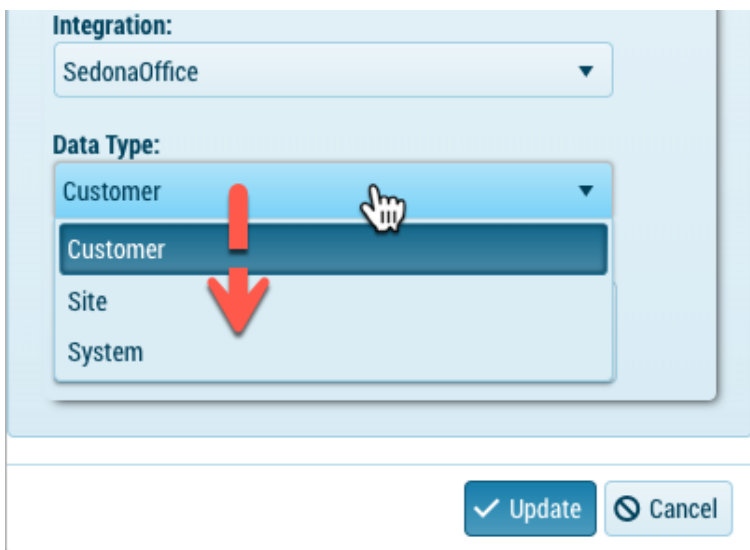


5. Select Integration and select SedonaOffice.
1. Note: If you have purchased the SedonaAPI and would like to integrate with SedonaOffice, select SedonaOffice (see SedonaOffice Integration for more details).



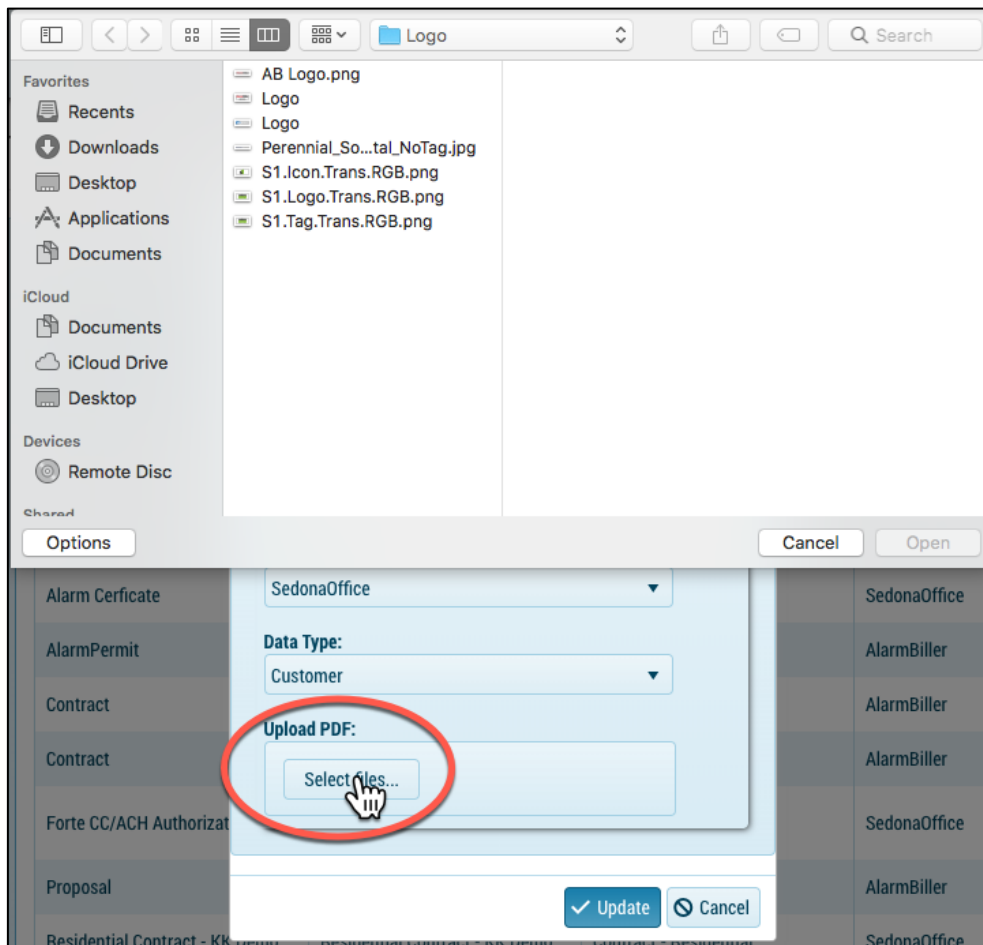
The screenshot shows a form with three sections: 'Integration:', 'Data Type:', and 'Upload PDF:'. The 'Integration:' dropdown is set to 'SedonaOffice' with a hand cursor pointing to it. The 'Data Type:' dropdown is set to 'Customer'. The 'Upload PDF:' section has a 'Select files...' button. At the bottom right are 'Update' and 'Cancel' buttons.

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.

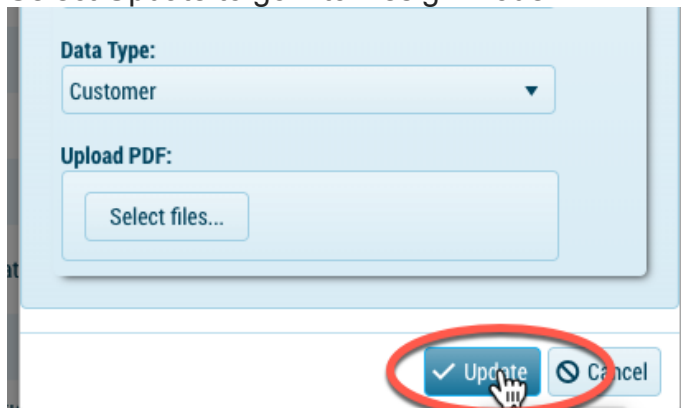


The screenshot shows the same form as before, but the 'Data Type:' dropdown menu is open, showing options: 'Customer', 'Site', and 'System'. A hand cursor is pointing to 'Customer', and a red arrow points down to it. The 'Integration:' dropdown remains set to 'SedonaOffice'. At the bottom right are 'Update' and 'Cancel' buttons.

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.

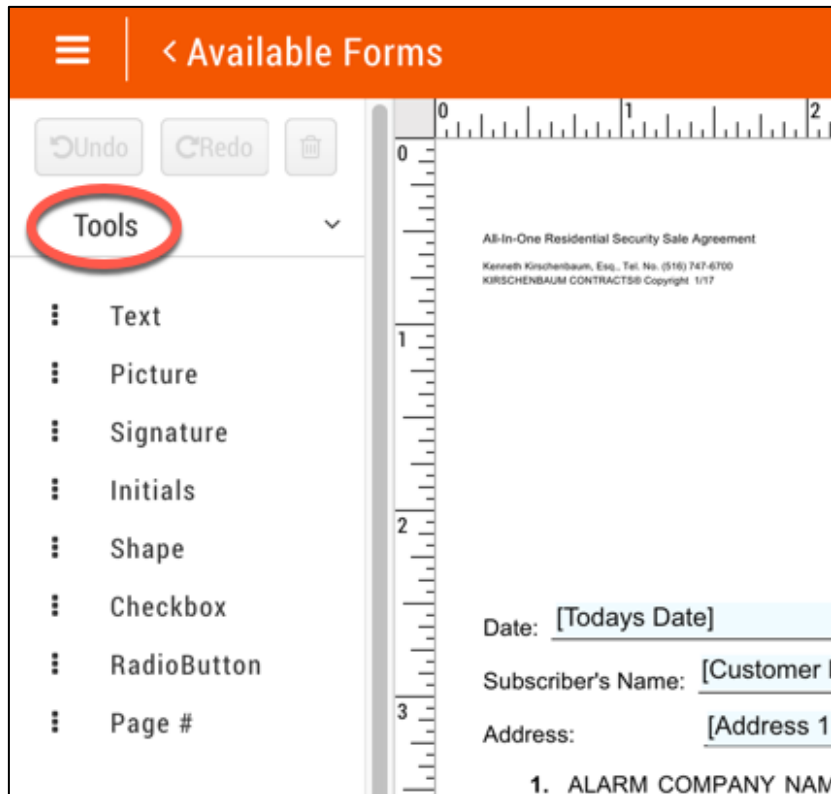
Design Mode

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.

The screenshot displays the SedonaOne eForms Design Mode interface. The top bar includes navigation options like '< Available Forms', 'Edit Example Data', 'Preview', and 'Save'. The main workspace shows a form titled 'STANDARD RESIDENTIAL SECURITY AGREEMENT' for 'ACME Alarms'. The form includes fields for Date, Subscriber's Name, Address, Telephone No., and Cell Phone No. It also has sections for 'DESCRIPTION OF SERVICES' and 'CHECK BOX FOR APPROPRIATE SERVICES'. The left sidebar contains a 'Tools' panel with options like Text, Picture, Signature, Initials, Shape, Checkbox, RadioButton, and Page #. Below the tools is a 'Shared Data' section with 'Customer' and 'Customer Site'. At the bottom is a 'Form Data' section with a list of fields including Cell Phone, Central Station, and various checkboxes. The bottom status bar shows 'Page Header', 'Header', 'Body', 'Footer', 'Page Footer', and a zoom level of 100%.

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.

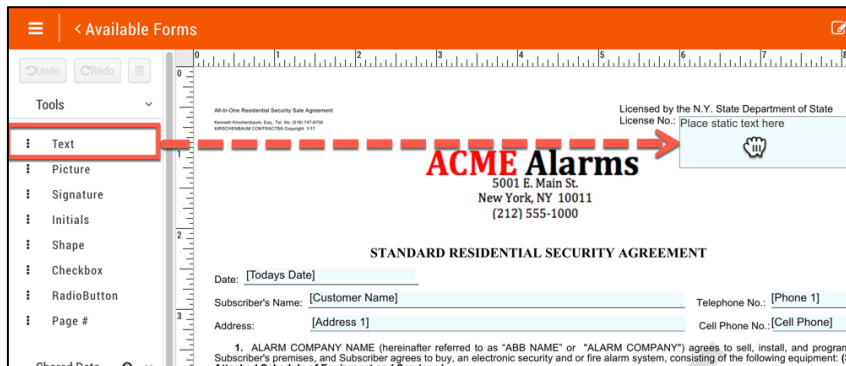


Tools Components

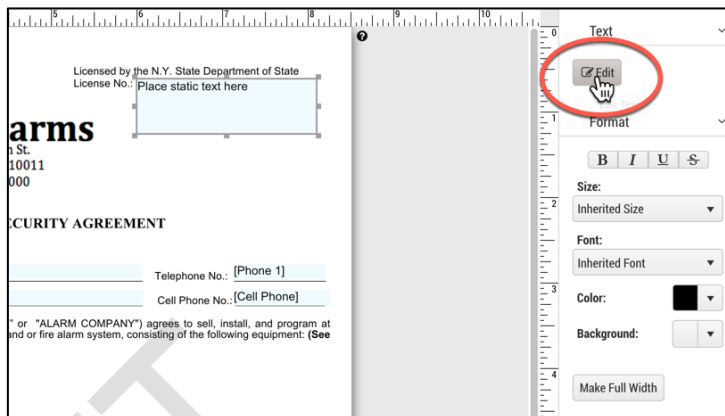
- **Text:** Text Box is used for adding static text that will be fixed on the form.
Note: This is not an editable text field recipients will interact with!
- **Picture:** Picture allows you to add a new picture onto a form or access a library of previously used pictures.
- **Signature:** Signature is a required field for a recipient to sign electronically. Place this field where 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

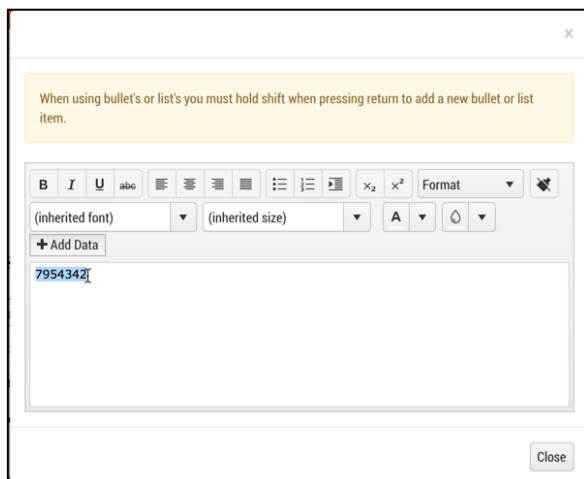
1. Click and drag **Text** from the tools section onto the template.



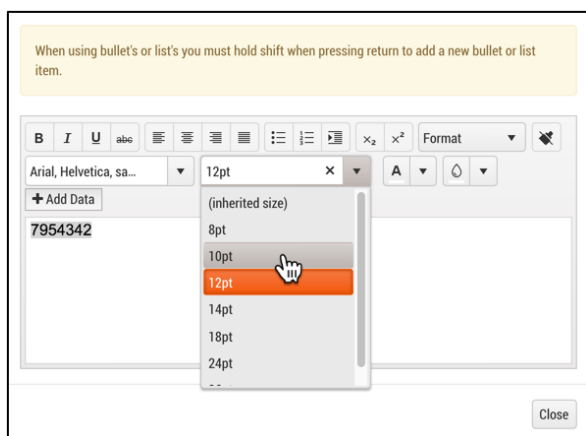
2. Select **Edit** in the right.



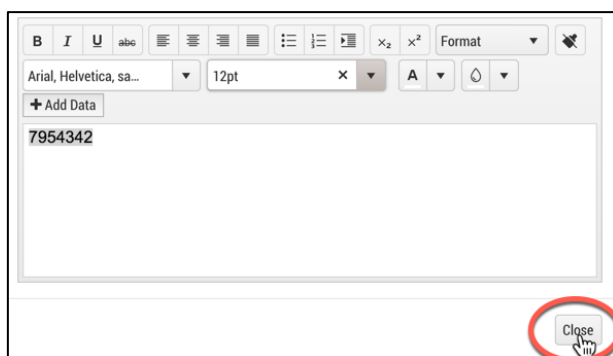
3. Type in the static text that will appear on the form.



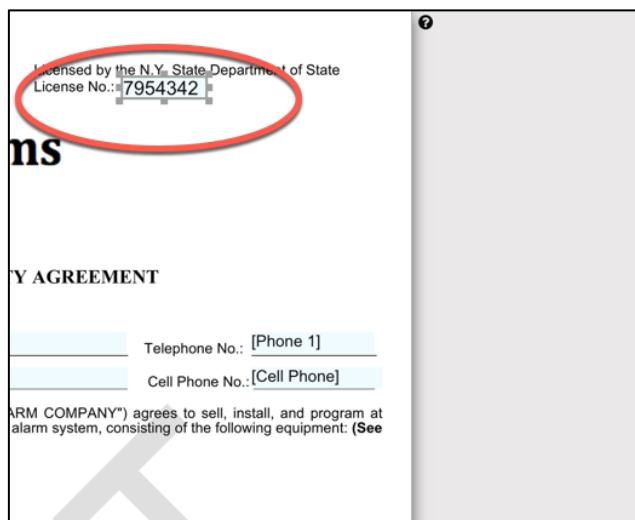
4. Format as needed (Bold, Underline, pick font, size, etc.).



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



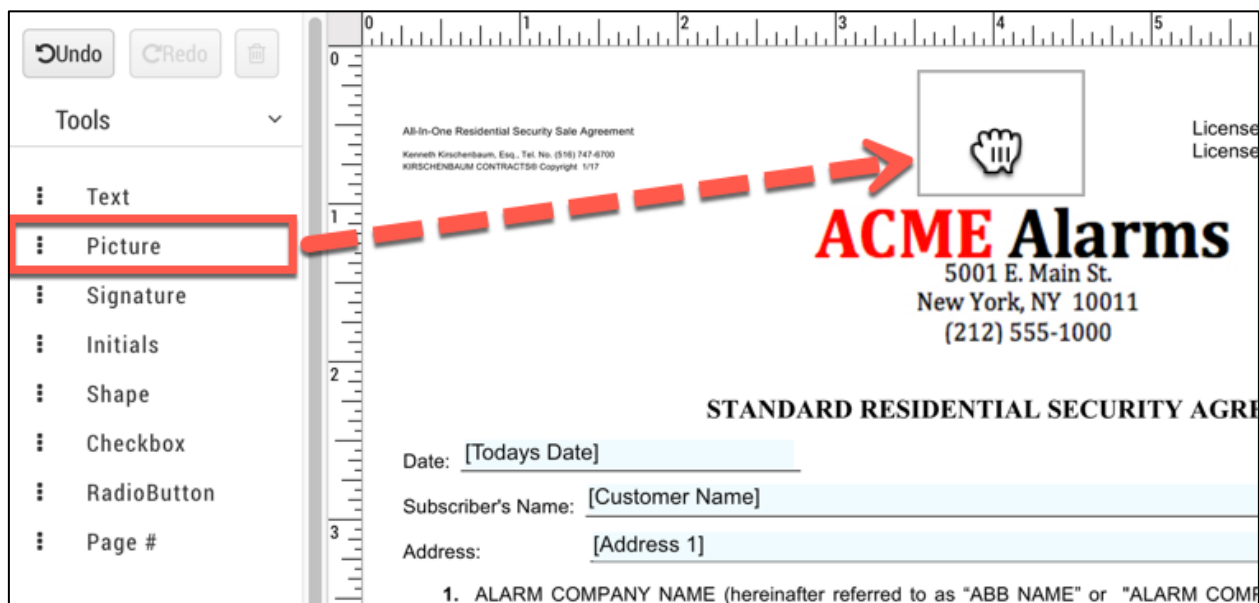
6. Drag the static text field to the correct location on the form.



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

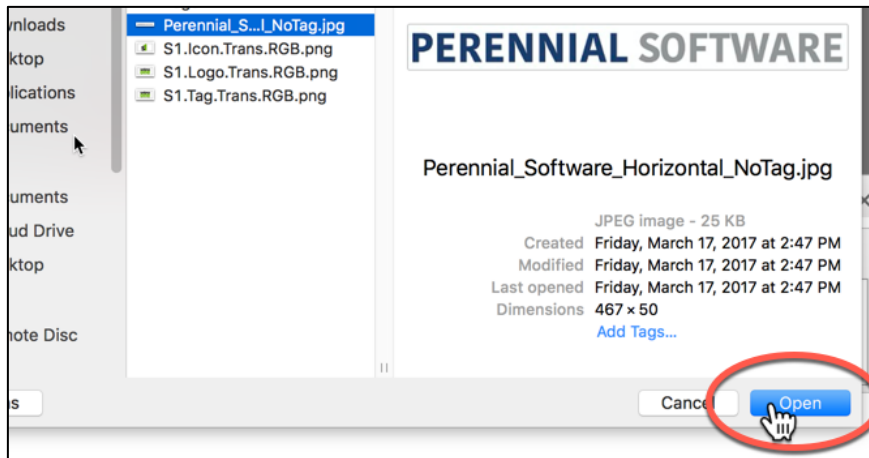
- Click and drag **Picture** from the tools section onto the form.



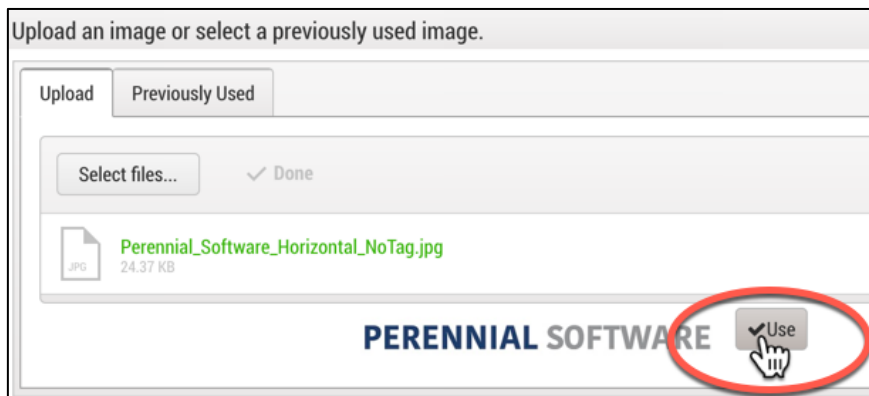
- Click Select files...



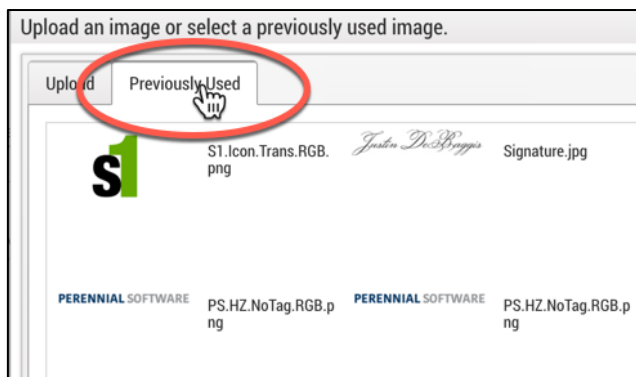
- Double Click on the image you would like to add or click and select **Open**.



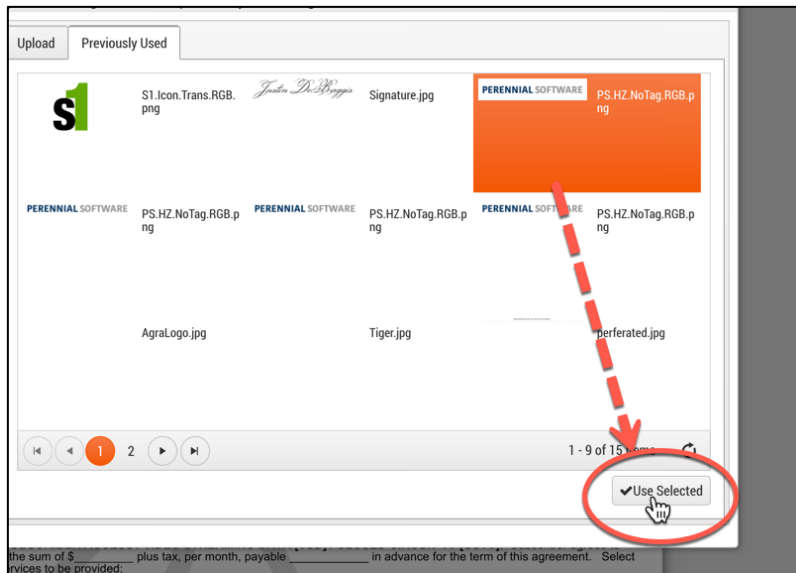
- Select **Use**.



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



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

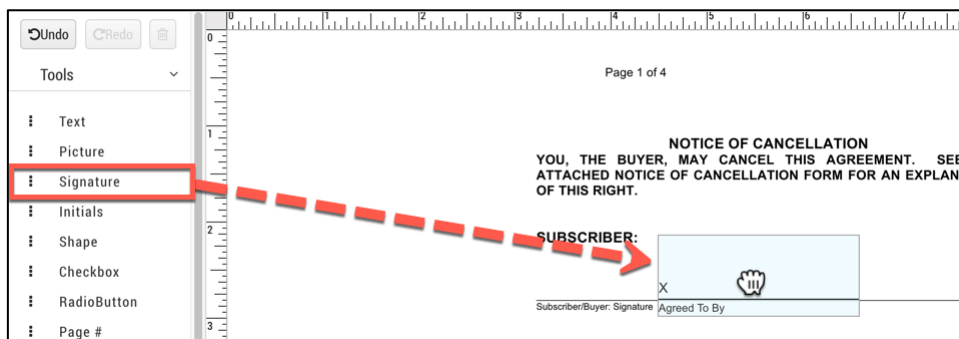


- Resize the picture as needed and drag to the correct location.



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.

Page 1 of 4

NOTICE OF CANCELLATION
 YOU, THE BUYER, MAY CANCEL THIS AGREEMENT. SEE THE ATTACHED NOTICE OF CANCELLATION FORM FOR AN EXPLANATION OF THIS RIGHT.

SUBSCRIBER:

Subscriber/Buyer: Signature

Print Name

Signature
☒ Show X:
☒ Show Line:
 Label:

 Make Full Width

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

Customer
 Customer Site

Form Data

Add Field

- Cell Phone
- Central Station
- Checkbox Data 1
- Checkbox Data 2
- Checkbox Data 3
- Checkbox Data 4
- Checkbox Data 5
- Checkbox Data 6
- Date of Work
- Monitoring
- Purchase Price
- Signature 0**
- Timestamp
- Name

SUBSCRIBER:

Subscriber/Buyer: Signature

Print Name

[Address 1]
 Address

ACME Alarm Company:

By: *Justin DeBaggis*

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.

Signature 0

Timestamp

Name

IP Address

Shared Data

Form Data

Add Field

Cell Phone

Central Station

Checkbox Data 1

Checkbox Data 2

Checkbox Data 3

Checkbox Data 4

Checkbox Data 5

Checkbox Data 6

Date of Work

Monitoring

Purchase Price

Signature 0

Timestamp

Name

IP Address

SUBSCRIBER: [IP Address]

Subscriber/Owner Signature

Print Name

[Address 1]

Address

ACME Alarm Company:

By: Justin DeBragis

Add Initials

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

Tools

Text

Picture

Signature

Initials

Shape

Checkbox

RadioButton

Page #

Shared Data

Customer

Customer Site

Form Data

Add Field

Cell Phone

Central Station

Checkbox Data 1

Checkbox Data 2

Checkbox Data 3

Initial Here:

PAGES 2 AND 3 OMITTED

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

Date of Work

Initials 0

Timestamp

IP Address

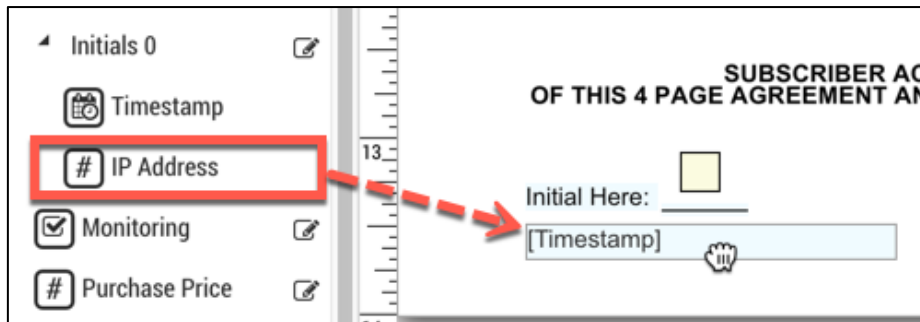
SUBSCRIBER ACKNOWLEDGES RECEIVING A FULL SCHEDULE OF THIS 4 PAGE AGREEMENT AND SCHEDULE OF EQUIPMENT AND SERVICES

Initial Here:

PAGES 2 AND 3 OMITTED

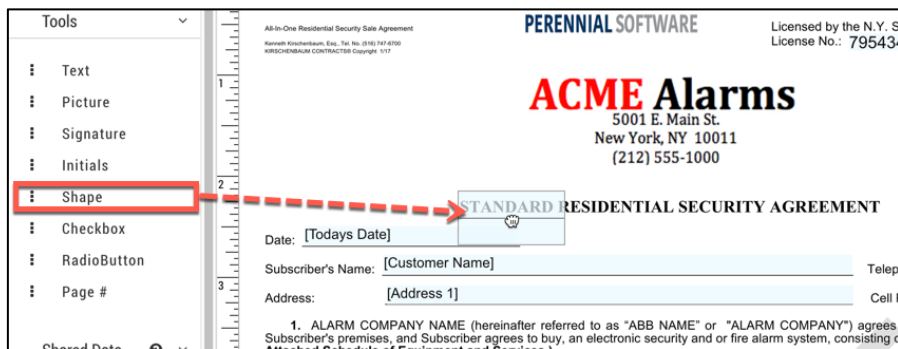
3. You may drag in the following fields and will automatically populate on the form after the e-initial is captured:

- **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.

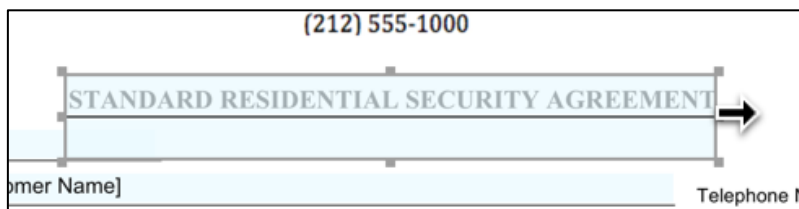


Add a Shape

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.

2. DESCRIPTION OF SERVICES:
Check services provided:

<input type="checkbox"/> Monitoring	<input type="checkbox"/> Service	<input type="checkbox"/> Inspection	<input type="checkbox"/> Remote Subscriber Access/Cameras	<input type="checkbox"/> Runner Service	<input type="checkbox"/> Alarm Signal Verification
<input type="checkbox"/> Guard Response	<input type="checkbox"/> Other: (See Attached Schedule of Equipment and Services.)				

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.

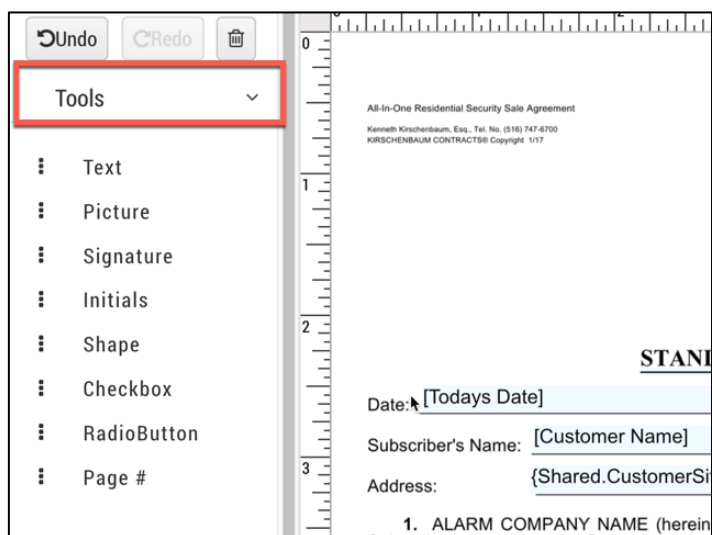
3. CHECK BOX FOR APPROPRIATE SERVICES AND CHARGES:
(a) CENTRAL STATION MONITORING

☐ (i) The sum of \$ _____
from the alarm panel if not already installed.

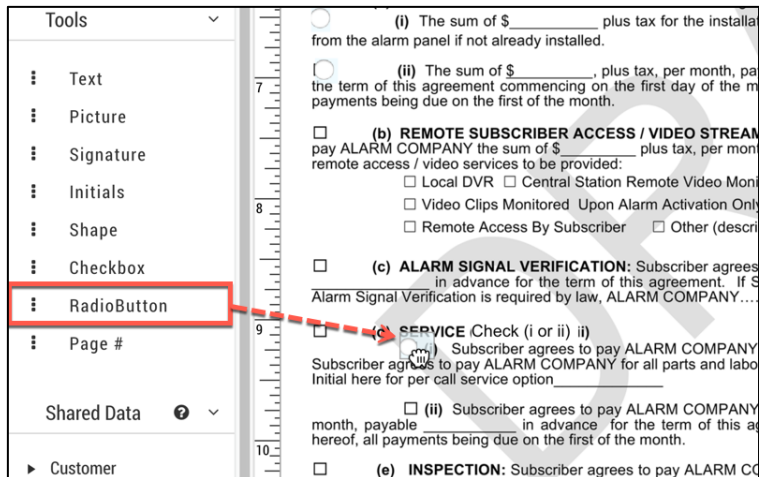
☐ (ii) The sum of \$ _____
the term of this agreement commencing on the first of the month of _____
payments being due on the first of the month of _____

Adding a Radio Buttons from Tools

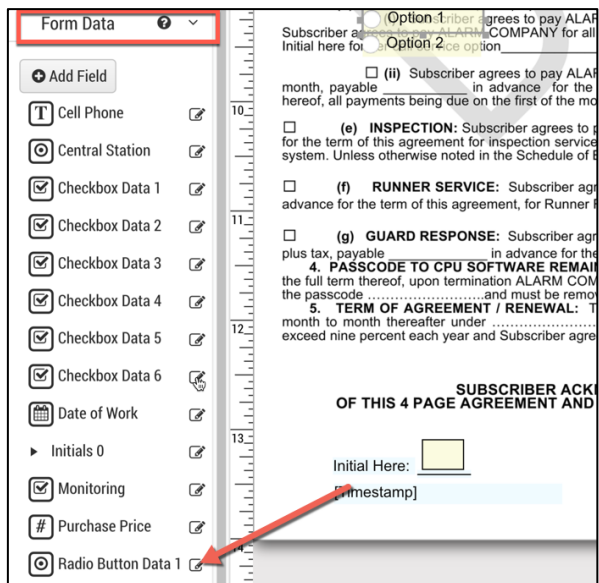
1. When in design mode on a template, navigate to **Tools**.



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



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



4. Select **Edit**.

Update Field

Field Name:

Display Text:

Options:

Value	Display Name	
1	Option 1	<input type="button" value="edit"/> <input type="button" value="x"/>
2	Option 2	<input type="button" value="edit"/> <input type="button" value="x"/>

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

Options:

Value	Display Name	
<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/> <input type="button" value="x"/>
1	Option 1	<input type="button" value="edit"/> <input type="button" value="x"/>
2	Option 2	<input type="button" value="edit"/> <input type="button" value="x"/>

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.

Options:




Value	Display Name	
3	Option 3	<input checked="" type="checkbox"/> <input type="button" value="x"/>
1	Option 1	<input type="button" value="edit"/> <input type="button" value="x"/>
2	Option 2	<input type="button" value="edit"/> <input type="button" value="x"/>

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)

Field Name:	Service
Display Text:	Service (D)
Options:	

8. Select **Update**.

Value	Display Name
1	Option 1
2	Option 2

 Delete Field  Close  Update

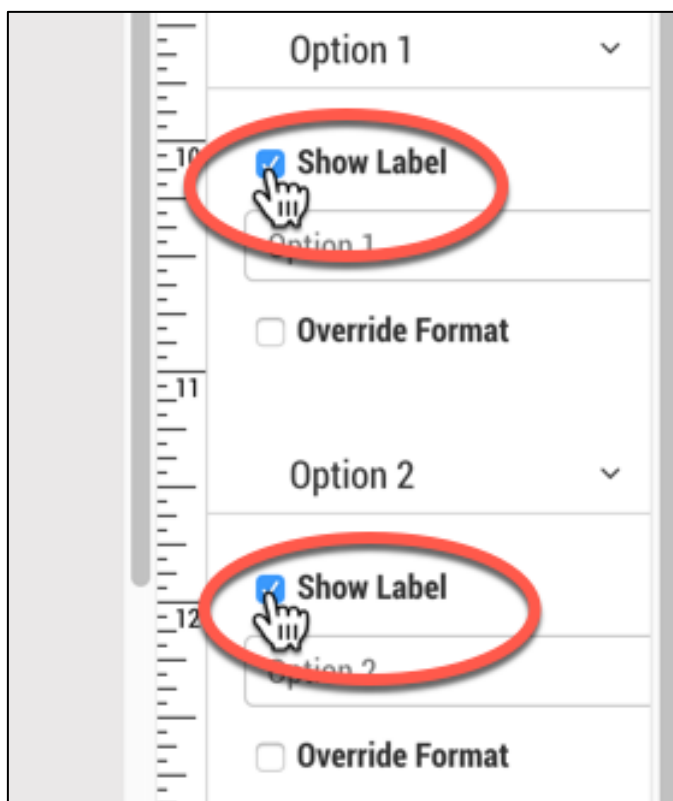
9. Select the field on the template.

(d) **SERVICE** Check (i or ii) ii)

☐ (Option 1) subscriber agrees to pay ALA
subscriber agrees to pay ALARIN COMPANY for a
initial here for per call service option _____

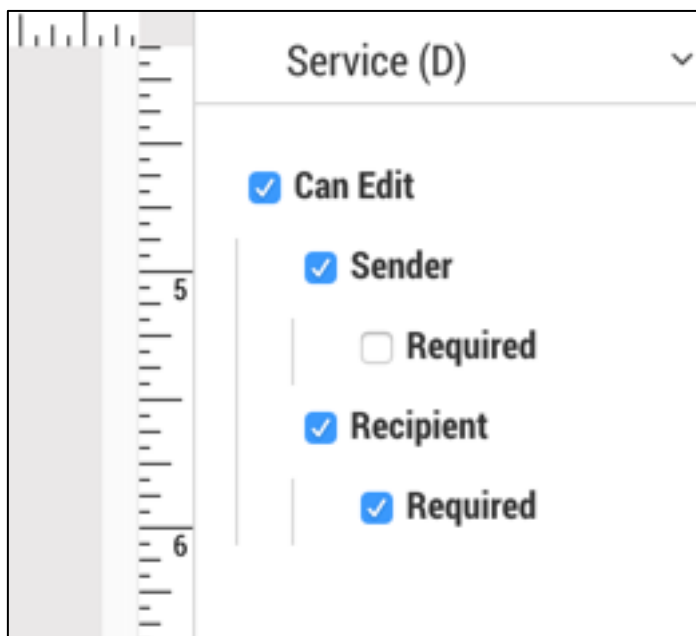
☐ (Option 2) subscriber agrees to pay ALA
month, payable _____ advance for the
ereof, all payments being due on the first of the m

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.

(d) **SERVICE** (Check (i or ii) ii)

☐ (i) Subscriber agrees to pay ALARM COMPANY for all parts and labor here for per call service option _____

☒ (ii) Subscriber agrees to pay ALARM COMPANY _____ per month, payable in advance of, all payments being due on the first of the month.

Adding Check Boxes from Tools

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

Tools

- Text
- Picture
- Signature
- Initials
- Shape
- Checkbox**
- RadioButton
- Page #

(a) **CENTRAL STATION MONITORING:** Subscriber agrees to pay ALARM COMPANY the sum of \$ _____ plus tax for the installation from the alarm panel if not already installed.

☐ (i) The sum of \$ _____ plus tax for the installation from the alarm panel if not already installed.

☐ (ii) The sum of \$ _____ plus tax, per month, pay the term of this agreement commencing on the first day of the month payments being due on the first of the month.

☐ (b) **REMOTE SUBSCRIBER ACCESS / VIDEO STREAM** pay ALARM COMPANY the sum of \$ _____ plus tax, per month remote access / video services to be provided:

☐ undefined ☐ Central Station Remote Video Monitoring

☐ Video Clips Monitored Upon Alarm Activation Only

☐ Remote Access By Subscriber ☐ Other (describe)

☐ (c) **ALARM SIGNAL VERIFICATION:** Subscriber agrees to pay ALARM COMPANY the sum of \$ _____ in advance for the term of this agreement. If Signal Verification is required by law, ALARM COMPANY _____

☐ (d) **SERVICE** (Check (i or ii) ii)

☐ (i) Subscriber agrees to pay ALARM COMPANY for all parts and labor here for per call service option _____

☒ (ii) Subscriber agrees to pay ALARM COMPANY _____ per month, payable in advance of, all payments being due on the first of the month.

3. Navigate to **Form Data**.

Form Data ? v

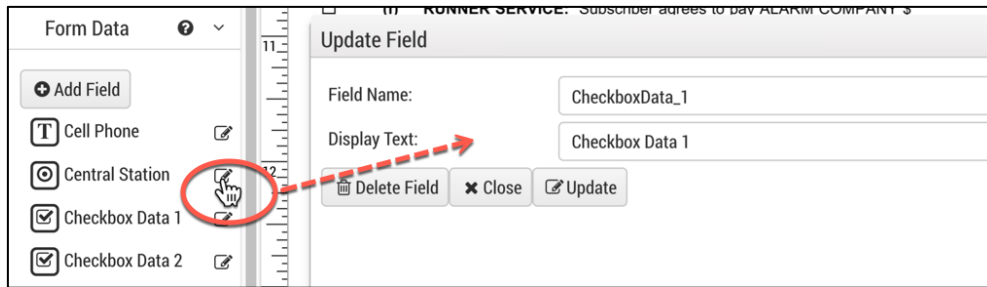
+ Add Field

Cell Phone

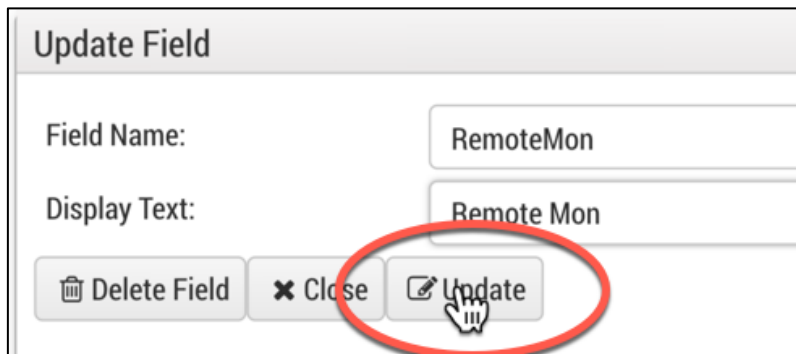
Central Station

☒ Checkbox Data 1

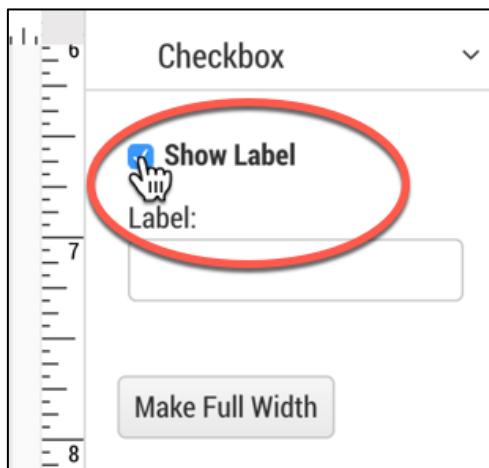
4. Select **Edit**.



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.

Subscriber agrees to pay ALARM COMPANY for all pa
Initial here for per call service option _____

(ii) Subscriber agrees to pay ALARM
month, payable _____ in advance for the ter
hereof, all payments being due on the first of the month

☐ (e) **INSPECTION:** Subscriber agrees to pay
for the term of this agreement for inspection service. If
system. Unless otherwise noted in the Schedule of Equ

☐ (f) **RUNNER SERVICE:** Subscriber agree
advance for the term of this agreement, for Runner Res

☐ (g) **GUARD RESPONSE:** Subscriber agrees
plus tax, payable _____ in advance for the te

4. PASSCODE TO CPU SOFTWARE REMAINS
the full term thereof, upon termination ALARM COMPA
the passcode _____ and must be removed

5. TERM OF AGREEMENT / RENEWAL: The
month to month thereafter under _____
exceed nine percent each year and Subscriber agrees

Adding a Form Data Field

1. Select + Add Field.

Form Data

+ Add Field

Cell Phone

Central Station

Checkbox Data 2

Checkbox Data 3

Checkbox Data 4

Checkbox Data 5

Checkbox Data 6

Checkbox Data 7

Add New Field

Field Name: _____

Display Text: _____

Data Type: Select a type

Close Add

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.

Add New Field

Field Name:

Display Text:

Data Type: **Select a type**

- Select a type
- Text
- Number
- Checkbox
- RadioButton
- DropDown
- Date

4. Select **+Add**.

Display Text:

Data Type:

5. Drag field onto template.

Customer

Customer Site

Form Data

Alarm Signal Amount

Cell Phone

Central Station

(c) **ALARM SIGNAL VERIFICATION:** Subscriber agrees to pay ALARM COMPANY the sum of \$[Alarm Signal Amount] in advance for the term of this agreement. If Subscriber selects Alarm Signal Verification as a service to be provided, Alarm Signal Verification is required by law, ALARM COMPANY.....

(d) **SERVICE** Check (i or ii) (i) Subscriber agrees to pay ALARM COMPANY on a per call basis. If this agreement provides for service on a per call basis, Subscriber agrees to pay ALARM COMPANY for all parts and labor at time of service. Subscriber is not obligated to..... Initial here for per call service option.....

(ii) Subscriber agrees to pay ALARM COMPANY for service of the security equipment the sum of \$..... plus tax, payable in advance for the term of this agreement, commencing the first day of the month next succeeding hereof, all payments being due on the first of the month.

(e) **INSPECTION:** Subscriber agrees to pay ALARM COMPANY \$..... plus tax, per month, payable in advance for the term of this agreement for inspection service. If this option is selected ALARM COMPANY will make an annual inspection of the system. Unless otherwise noted in the Schedule of Equipment and Services.....

(f) **RUNNER SERVICE:** Subscriber agrees to pay ALARM COMPANY \$..... plus tax, per month, payable in advance for the term of this agreement, for Runner Response Service for up to a maximum of runs per year.

(g) **GUARD RESPONSE:** Subscriber agrees to pay ALARM COMPANY the sum of (select payment method) \$..... per month

6. Resize the field to fit.

sum of \$[Alarm Signal Amount] plus tax, per month, payable in advance for the term of this agreement, commencing the first day of the month next succeeding hereof, all payments being due on the first of the month.

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.

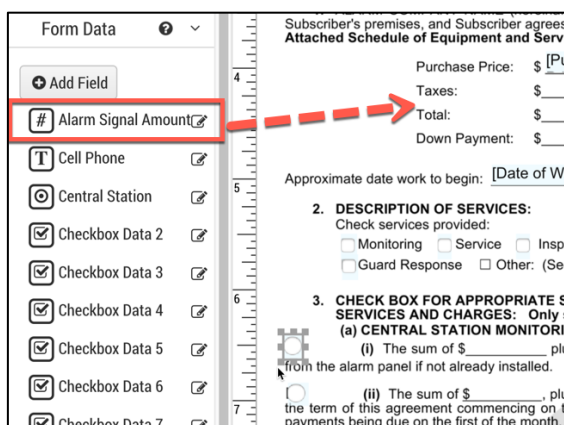
Below are the different types of fields:

- **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

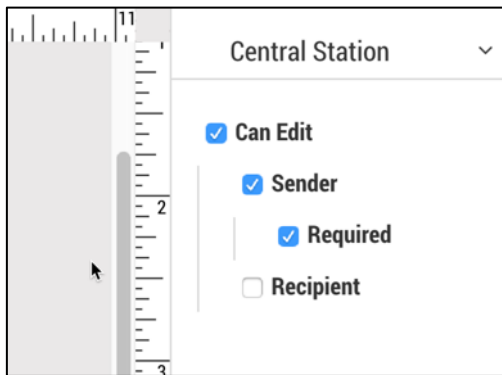
When adding a **Form Data** field or **Shared Data** you will need to determine who can edit the field and if it is required.

1. Drag in a field.



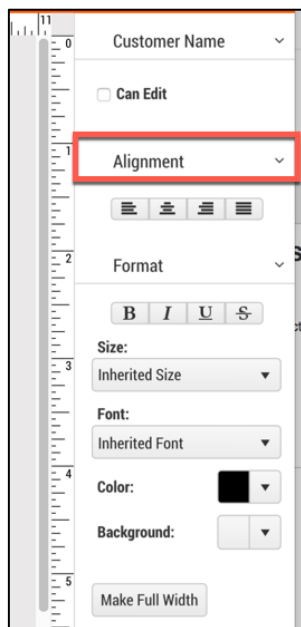
2. Navigate to the top right bar.
3. Select Can edit and follow the rules below.
 - **Can Edit:** The field can be edited.

- **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.



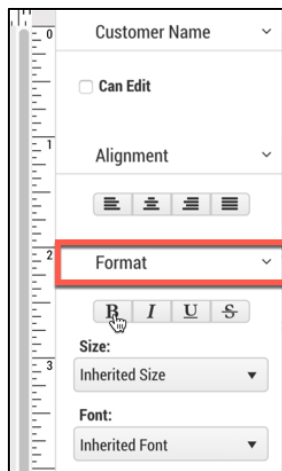
Alignment

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



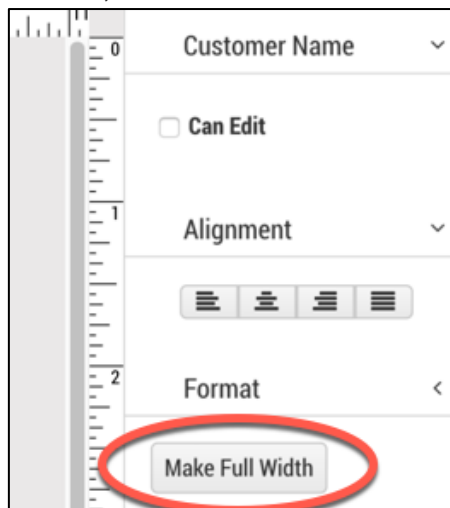
Format

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.

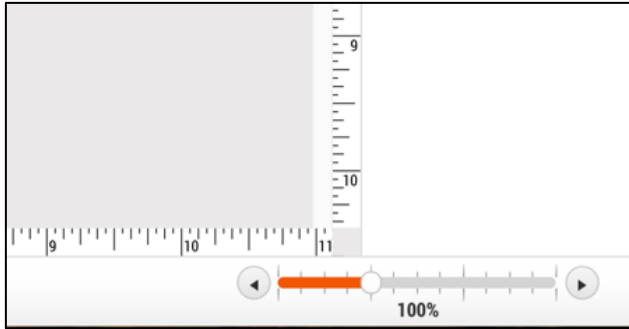


Zoom

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

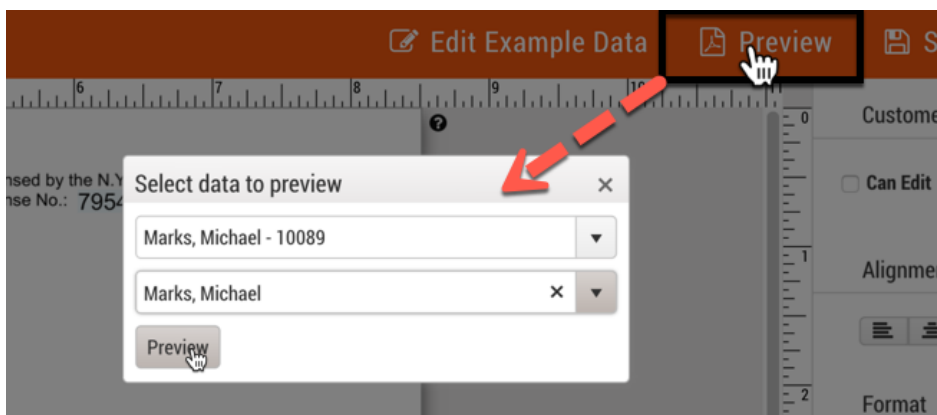
Click Preview to view a preview of what the template will look like when delivering. If example data is entered or **Shared Data** fields, this will populate the form so you can make sure alignment, size, font, placement, etc. are correct in the template.

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.

The screenshot shows the Microsoft Word ribbon with the 'Edit Example Data' tab selected. The 'Save' button is highlighted with a red box. The ribbon also shows 'Preview' and 'Edit Example Data' buttons. The document content is partially visible, showing a form with fields for 'Customer Name', 'Can Edit', 'Alignment', and 'Format'. The 'Make Full Width' button is also visible.

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.

< Available Forms

- Shape
- Checkbox
- RadioButton
- Page #

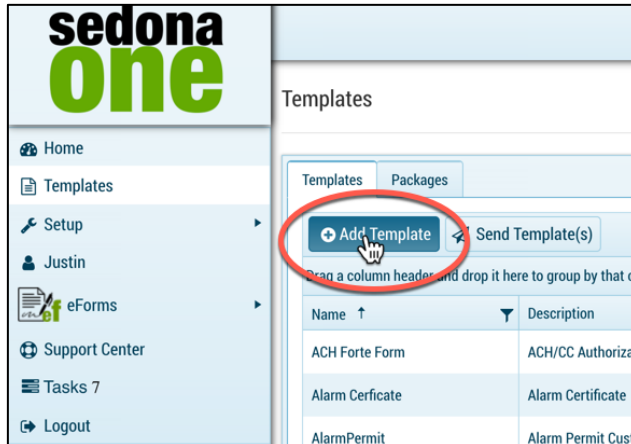
All-In-One Residential Security Sale Agreement
Kenneth Kirschenbaum, Esq., Tel. No. (516) 747-6700
KIRSCHENBAUM CONTRACTS® Copyright 1/17

SedonaOffice Integration

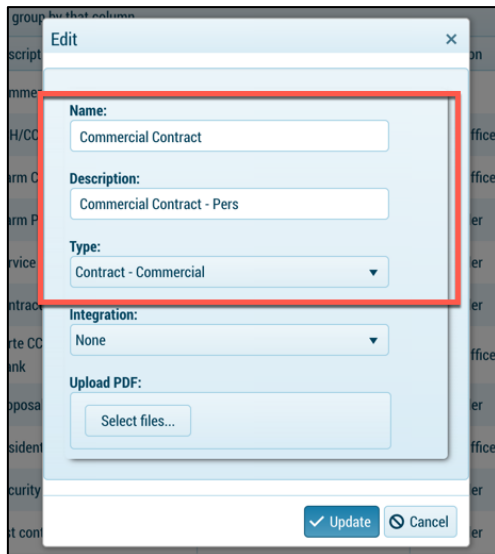
SedonaOffice integration is only available if the SedonaAPI was purchased and turned on. The integration allows for SedonaOffice fields to merge directly onto a template. After a template is completed the PDF document can be pushed to SedonaDocs.

Adding Template with Integration

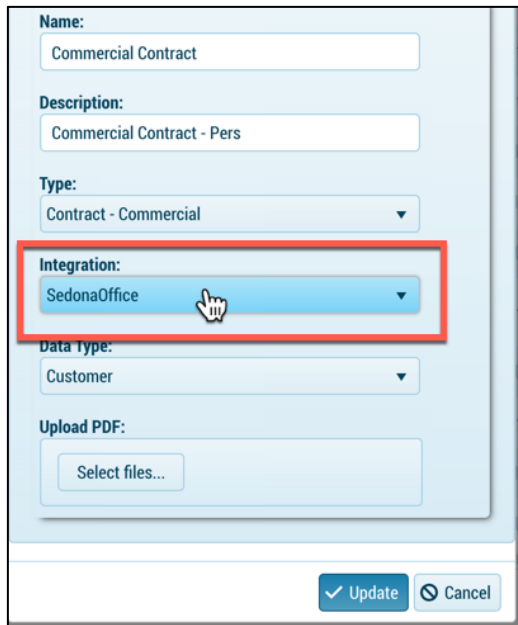
1. Navigate to **Templates**.
2. Select **+ Add Templates**.



3. Enter in the name, description and type.

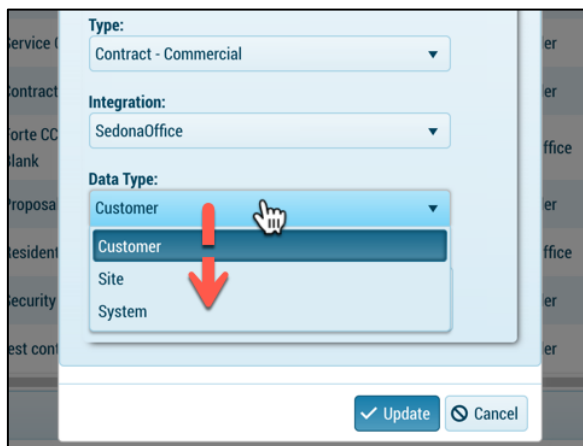


4. Select Integration: SedonaOffice

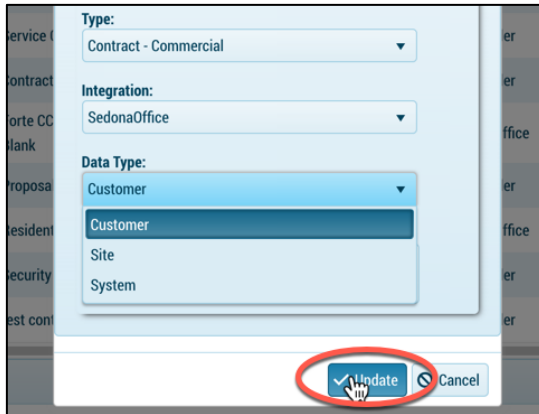


5. Data Type: Is this linked at the customer, site or system level.

- **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.

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

STANDARD RESIDENTIAL SECURITY AGREEMENT

Date: [Today's Date]

Subscriber's Name: [Customer Name]

Address: [Address 1]

1. ALARM COMPANY NAME (hereinafter referred to as "ABB NAME" or "ALARM COMPANY")
Subscriber's premises, and Subscriber agrees to buy, an electronic security and or fire alarm system
Attached Schedule of Equipment and Services.)

Purchase Price: \$ [Purchase Price]
Taxes: \$
Total: \$
Down Payment: \$ Balance due upon completion of

Approximate date work to begin: [Date of Work] Estimated date work to be substantial

2. DESCRIPTION OF SERVICES:
Check services provided:
☐ Monitoring ☐ Service ☐ Inspection ☐ Remote Subscriber Access/Cameras
☐ Guard Response ☐ Other: (See Attached Schedule of Equipment and Services.)

3. CHECK BOX FOR APPROPRIATE SERVICES:
SERVICES AND CHARGES: Only services selected are included:

Shared Data in a Text Box

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

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ACME Alarms
5001 E. Main St.
New York, NY 10011
(212) 555-1000

STANDARD RESIDENTIAL SECURITY AGREEMENT

Date: [Today's Date]

Subscriber's Name: [Customer Name]

Address: Place static text here

1. ALARM COMPANY NAME (hereinafter referred to as "ABB NAME" or "ALARM COMPANY")
Subscriber's premises, and Subscriber agrees to buy, an electronic security and or fire alarm system
Attached Schedule of Equipment and Services.)

Purchase Price: \$ [Purchase Price]

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

When using bullet's or list's you must hold shift when pressing return to add a new bullet or list item.

Place static text here

Edit

Format

(inherited font) (inherited size) A

+ Add Data

Size: Inherited Size

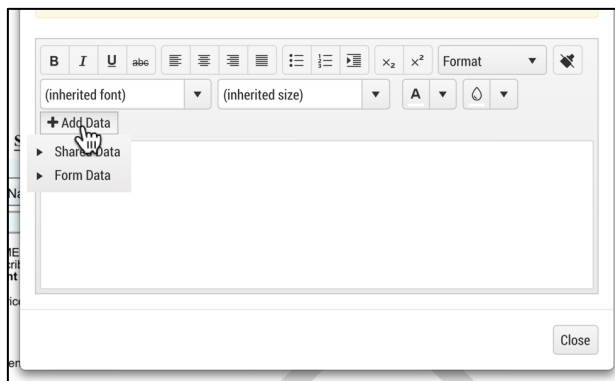
Font: Inherited Font

Color: [Color Picker]

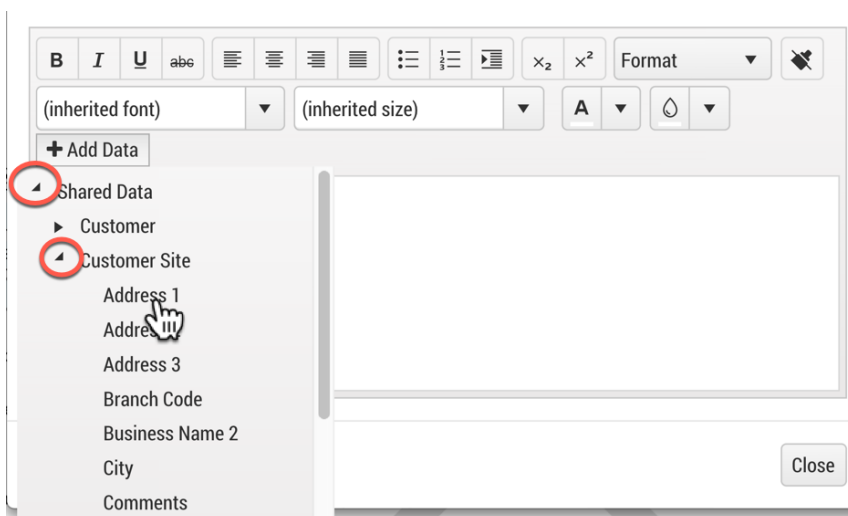
Background: [Color Picker]

Make Full Width

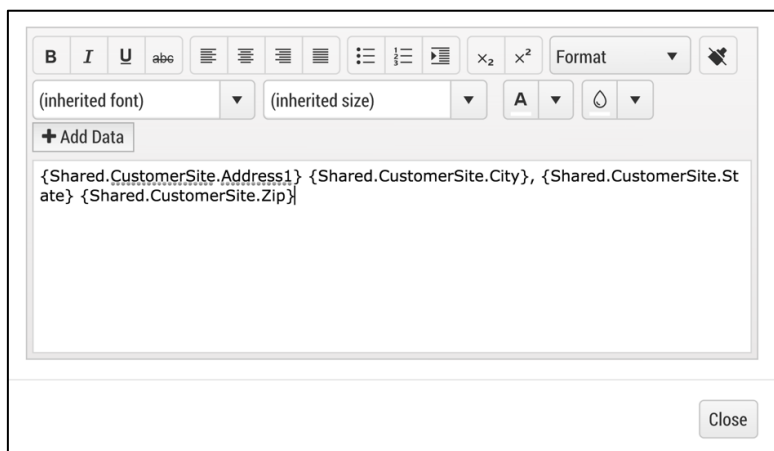
5. Select **+ Add Data**.



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



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



8. Select **Close**.

Date]

me: [Customer Name] Telephone

{Shared.CustomerSite.Address1} {Shared.CustomerSite.City}, {Shared.Cus Cell Phone

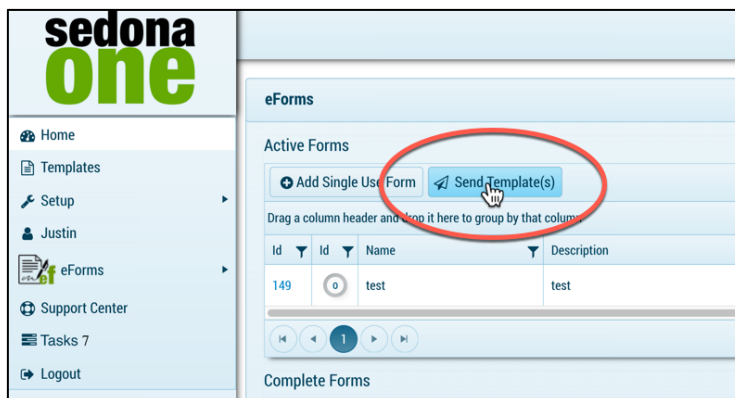
COMPANY NAME (hereinafter referred to as "ABB NAME" or "ALARM COMPANY") agrees to se
premises, and Subscriber agrees to buy, an electronic security and or fire alarm system, consisting of the
Module of Equipment and Services.

Purchase Price: \$ [Purchase

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.

The screenshot shows the 'eForms' window with the 'Templates' dropdown menu open. A red arrow points to the 'Residential Contract - KK Demo' option, which is highlighted in blue. Other options in the list include 'Residential Package', 'Security Template - 3 options', 'Alarm Certificate', 'Forte CC/ACH Authorization Site', 'New Customer Forms', and 'test contacts/zones/call list'. The dropdown is categorized with 'PROPOSAL', 'SITE', and 'SYSTEM' tags.

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

The screenshot shows the 'eForms' window with the 'Templates' dropdown closed. The 'Customer' field is set to 'Marks, Michael - 10089' and the 'Site' field is set to 'Marks, Michael'. Both fields are highlighted with a red rectangle. A 'Save' button is visible at the bottom right.

4. Select **Save**.

The screenshot shows the 'eForms' window with the 'Customer' and 'Site' fields selected. A red circle highlights the 'Save' button at the bottom right, with a hand cursor icon pointing to it.

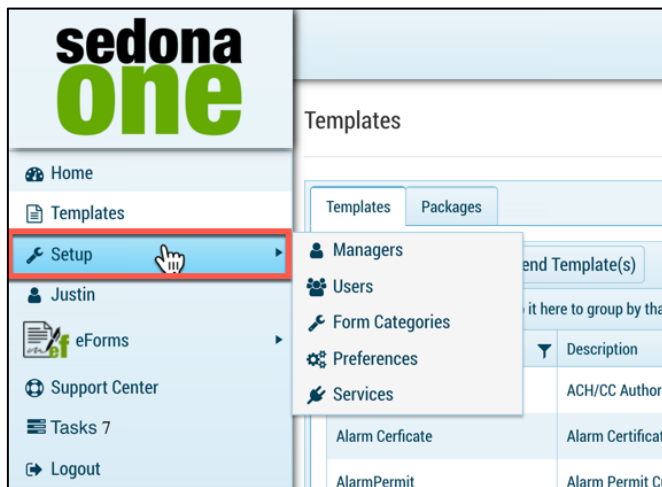
SedonaDocs Integration

**SedonaDocs is Required*

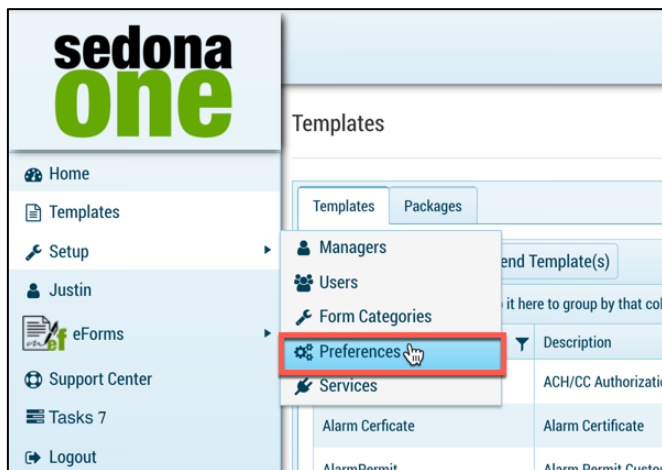
When a form is completed and the template is integrated with SedonaOffice at the customer, site or system level the completed PDF will automatically save in documents based on the customer that completed. You can have the application automatically move it to SedonaDocs at the customer, site or system level. This is an option in setup, and 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**.

The screenshot shows the 'Preferences' window with the 'eForms Settings' tab selected. Under the 'Edit eForms Settings' section, the 'Reminder' subsection is visible. The 'Enable Reminders' checkbox is unchecked. The 'Push Data' checkbox is also unchecked. The 'Push Document' checkbox is checked and circled in red. The 'Reminder (days)' field is set to 1.

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**.


The screenshot shows the SedonaOne eForms Home screen. The left sidebar contains the following menu items: Home (highlighted with a red box and a mouse cursor), Templates, Setup, Justin, eForms, Support Center, Tasks 7, and Logout. The main content area is titled 'eForms' and contains sections for 'Active Forms' and 'Complete Forms'. The 'Active Forms' section shows a table with one row: 'test' with ID '149'. The 'Complete Forms' section is currently empty.

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).

Complete Forms

Show Just My Forms ☐ Show Archived ☐

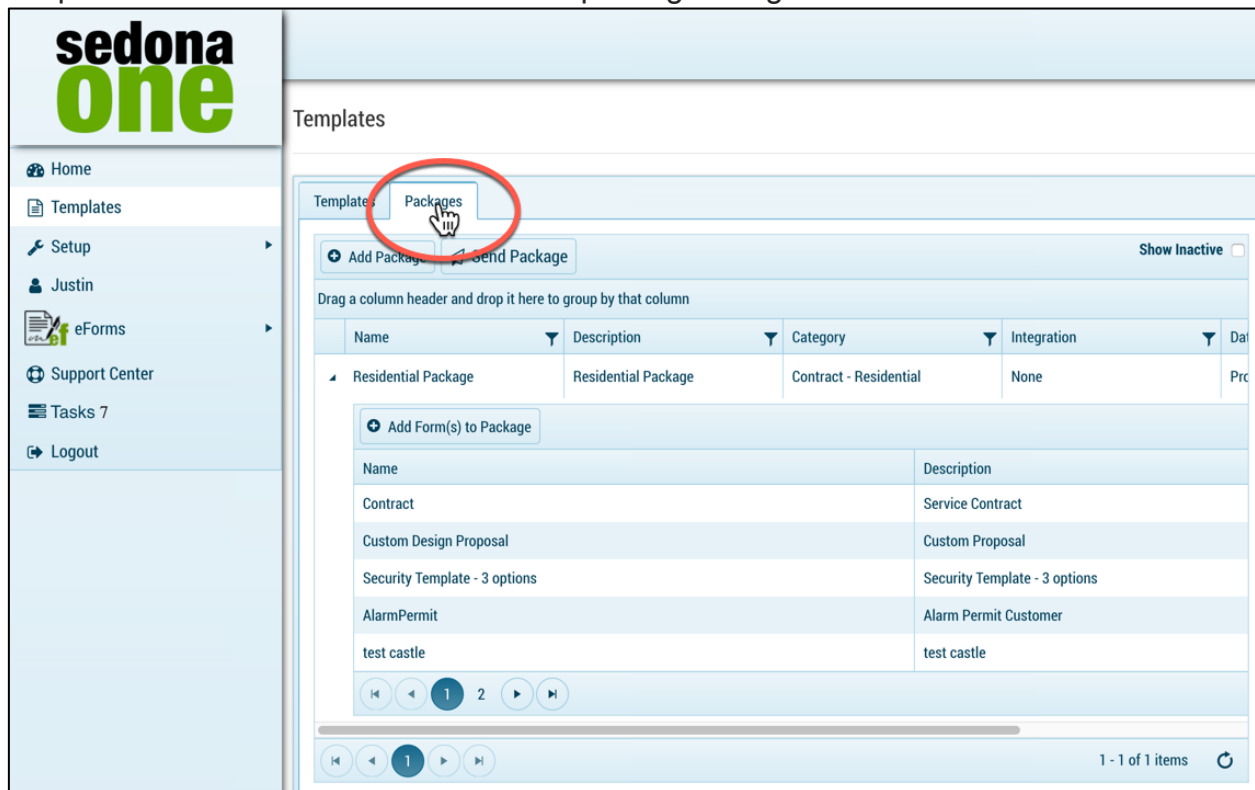
Drag a column header and drop it here to group by that column

Id	Id	Name	Description	Created By	Completed On	
151	✓	Residential Contract: Justin DeBaggis	Residential Contract: Justin DeBaggis	Debaggis, Justin	1/19/2018 12:16 PM	  
148	✓	Resi Contract - Justin DeBaggis	Resi Contract - Justin DeBaggis	Debaggis, Justin	1/11/2018 9:45 AM	  
147	✓	Michael Marks	Michael Marks	Debaggis, Justin	12/21/2017 9:18 AM	  
146	✓	test	test	Debaggis, Justin	12/15/2017 10:00 AM	  
144	✓	proposal		Debaggis, Justin	12/5/2017 1:21 PM	  

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

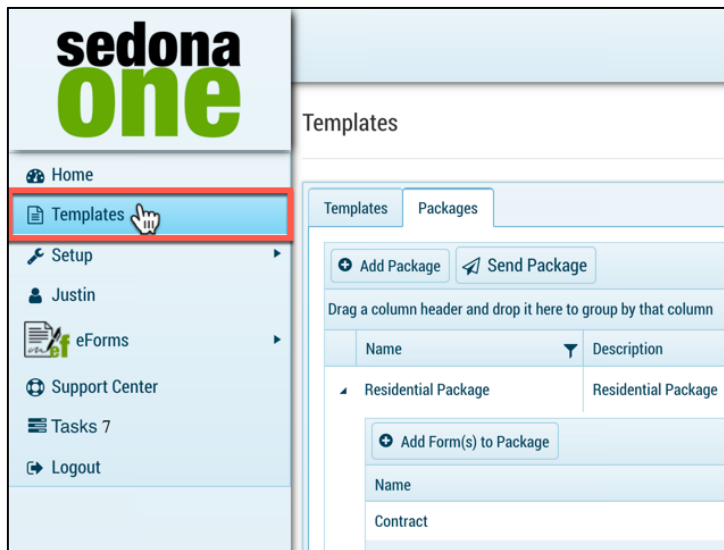
Packages

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.

Templates

Templates Packages

+ Add Package - Send Package

Drag a column header and drop it here to group by that column

Name	Description	Category	Integration	Data Type
Residential Package	Residential Package	Contract - Residential	None	Proposal

+ Add Form(s) to Package

Name	Description
Contract	Service Contract
Custom Design Proposal	Custom Proposal
AlarmPermit	Alarm Permit Customer

1 - 1 of 1

3. Select **+ Add Package**.

Templates

Templates Packages

+ Add Package - Send Package

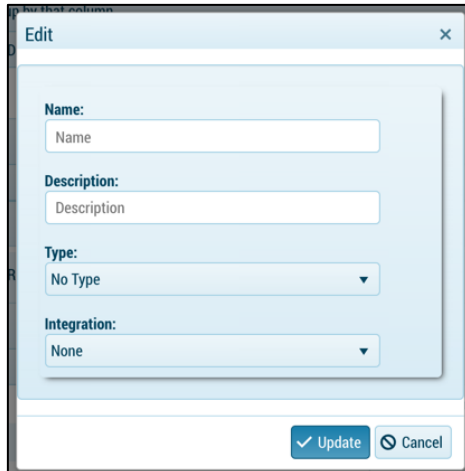
Drag a column header and drop it here to group by that column

Name	Description	Category
Residential Package	Residential Package	Contract - Residential

+ Add Form(s) to Package

Name	Description
Contract	Service Contract
Custom Design Proposal	Custom Proposal
AlarmPermit	Alarm Permit Customer

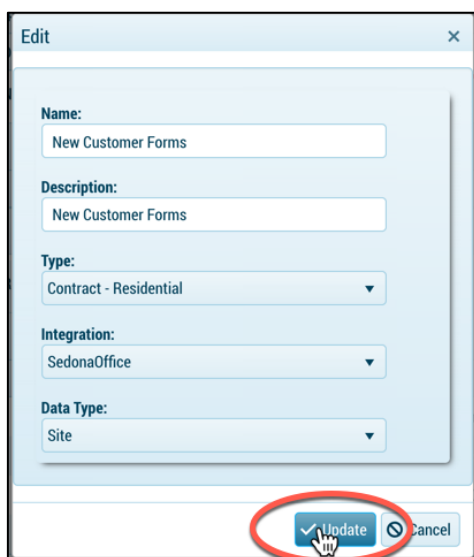
4. Fill in the required fields.



The screenshot shows a light blue 'Edit' dialog box with a close button (X) in the top right corner. It contains four labeled input fields: 'Name:' with a text box containing 'Name', 'Description:' with a text box containing 'Description', 'Type:' with a dropdown menu showing 'No Type', and 'Integration:' with a dropdown menu showing 'None'. At the bottom right are two buttons: 'Update' (with a checkmark icon) and 'Cancel' (with a circle and X icon).

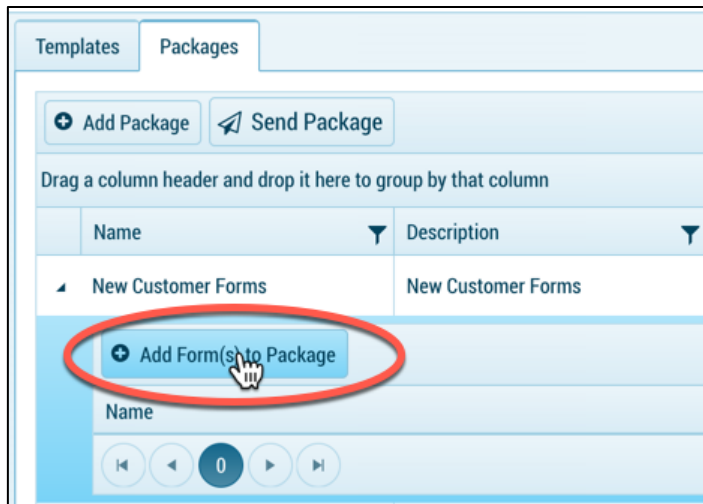
- **Name:** Name the user provided for the template e.g. All-in-One Contract. When selecting a template to send the dropdown list will show the name of the template.
- **Description:** Description the user provided for the template. This may be the same as the name or
- **Category:** Category the user 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**.

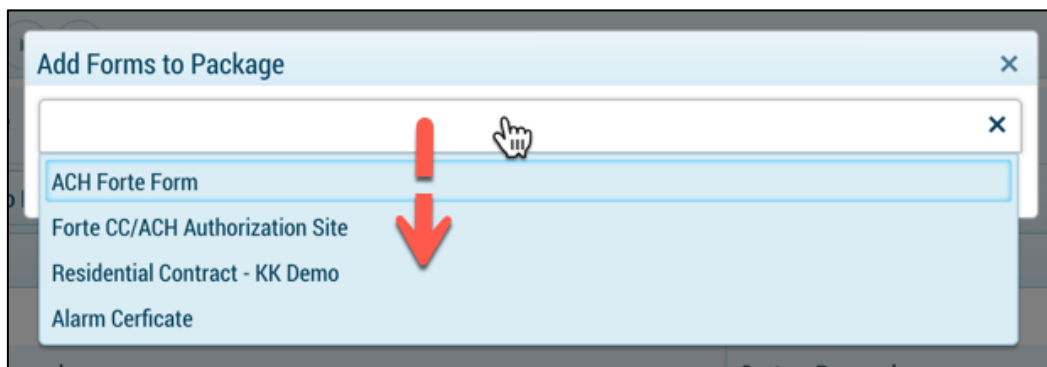


This screenshot shows the same 'Edit' dialog box, but now the fields are populated: 'Name:' is 'New Customer Forms', 'Description:' is 'New Customer Forms', 'Type:' is 'Contract - Residential', and 'Integration:' is 'SedonaOffice'. A new 'Data Type:' field has been added at the bottom with a dropdown menu showing 'Site'. The 'Update' button at the bottom right is circled in red, and a mouse cursor is clicking on it.

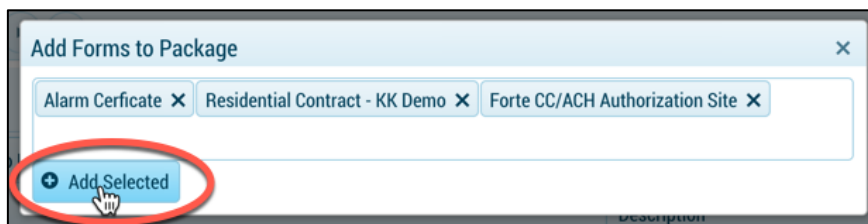
6. Select **+ Add Form(s)** to under the package.



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.

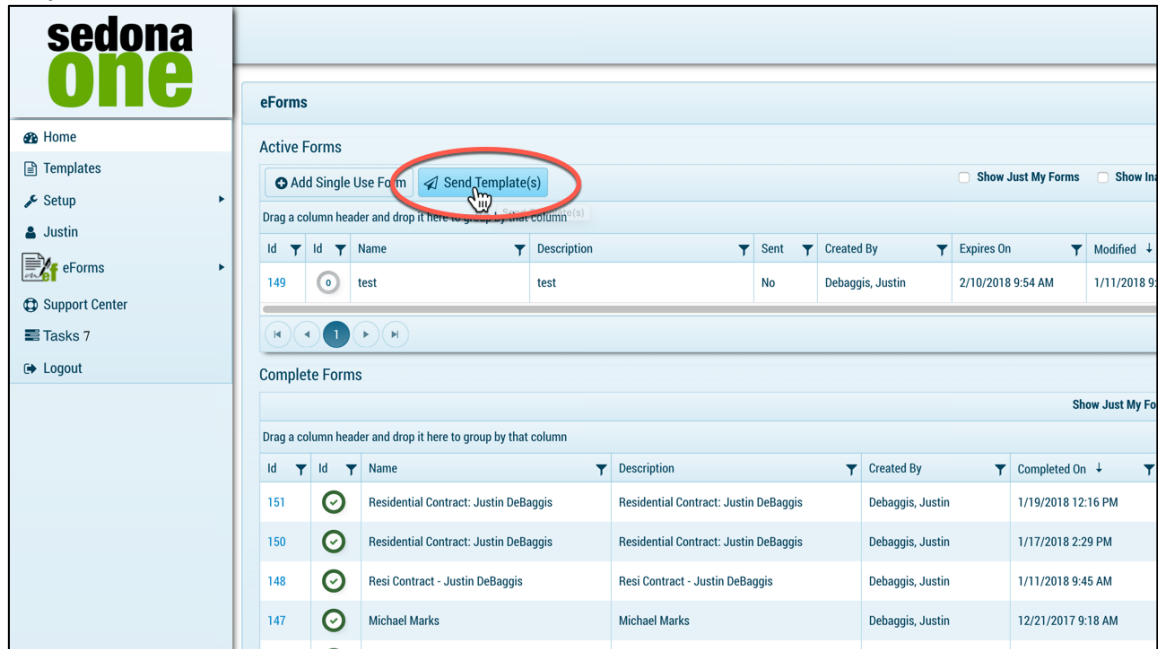


8. Select **+ Add Selected**.



Sending Templates for Electronic Signing

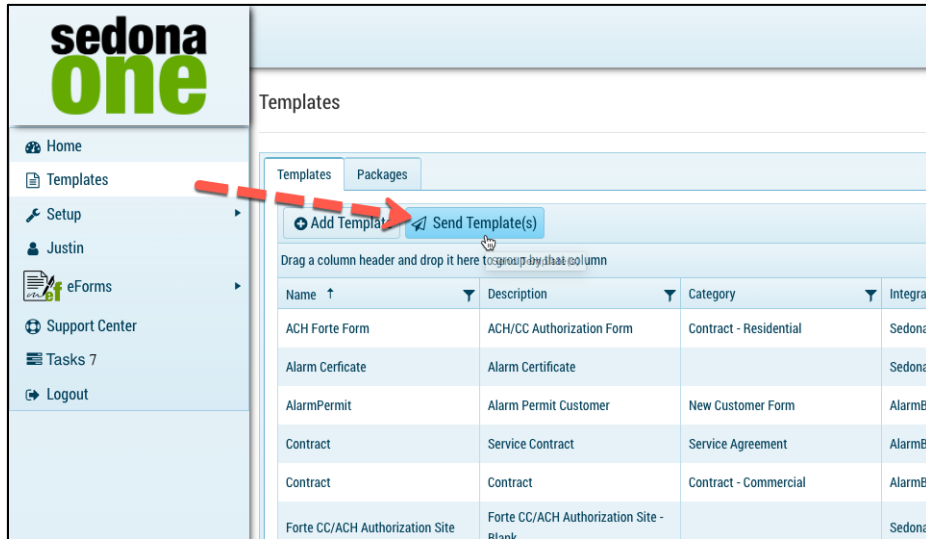
A key feature in eForms is the ability to send the templates or single use forms for signing. This section provides step-by-step procedures for delivering documents. The steps to follow are listed below:



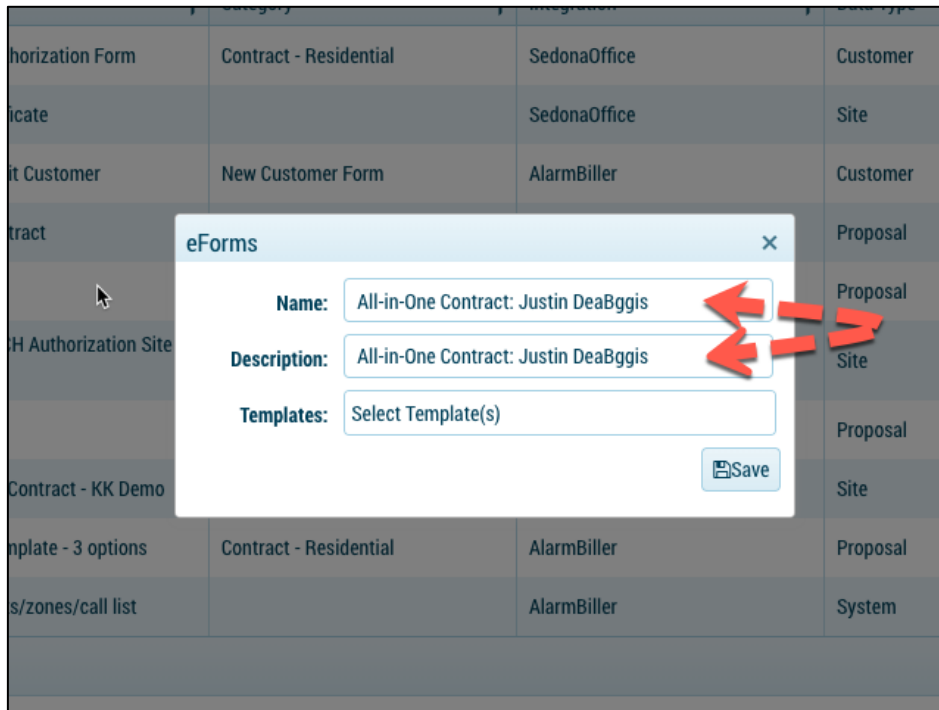
1. Navigate to **Home** or **Templates** tab.



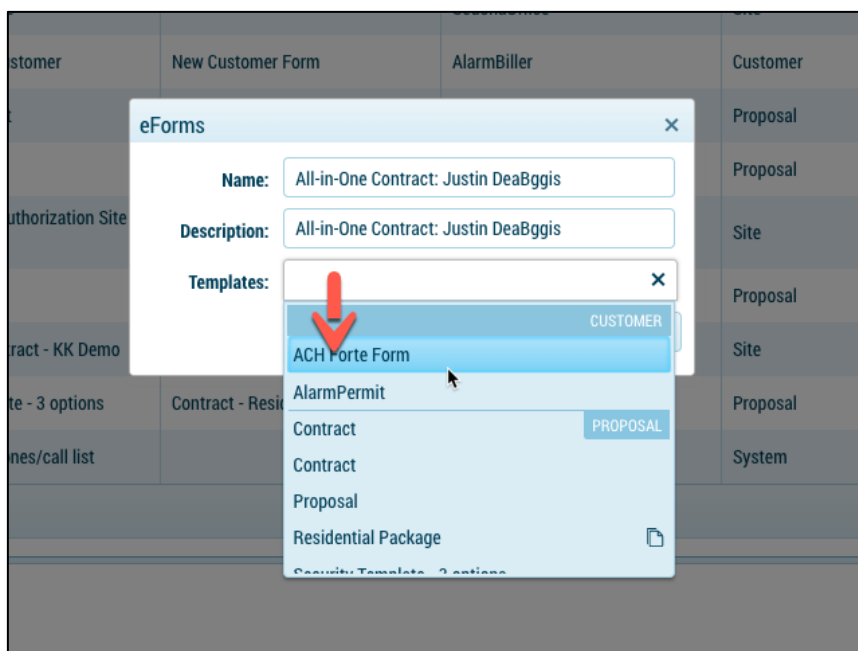
2. Select **Send Template**.



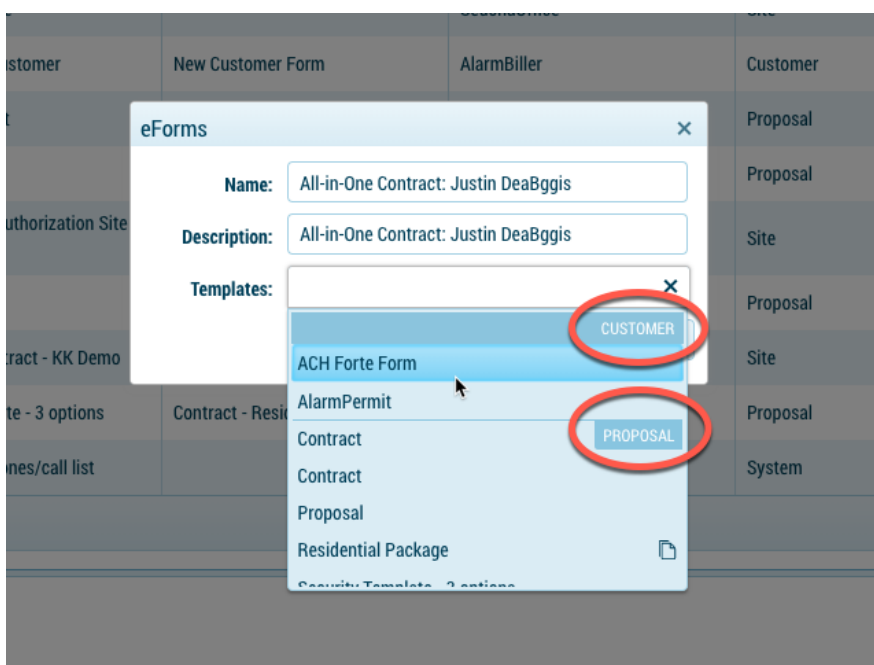
3. Enter in a **Name & Description**.



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**.

The screenshot shows a web application interface with a sidebar on the left containing menu items like 'New Customer Form', 'AlarmBiller', 'Customer', 'Proposal', 'Site', and 'System'. The main content area displays a form titled 'eForms' with the following fields:

- Name:** All-in-One Contract: Justin DeaBggis
- Description:** All-in-One Contract: Justin DeaBggis
- Templates:** AlarmPermit X
- Customer:** DeBaggis, Justin - 1003 X

A red circle highlights the 'Save' button at the bottom right of the form. A mouse cursor is pointing at the button.

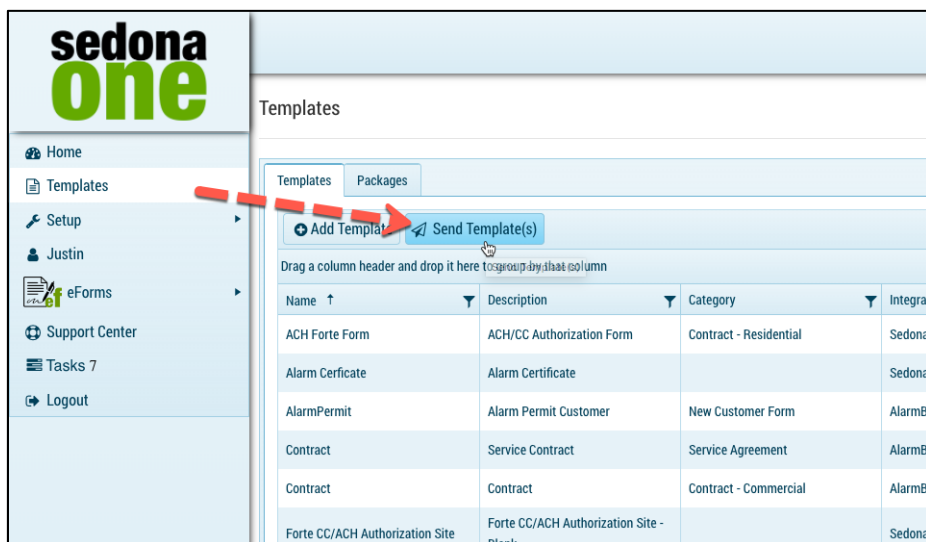
Note: If a form has no integration you will need to select Save. If a form with an integration is selected you will be prompted to select a customer, site or system.

Sending Packages

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



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



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

The screenshot shows a modal dialog titled "eForms" with a close button (X). It contains three input fields: "Name:" with the text "All-in-One Contract: Justin DeaBggis", "Description:" with the text "All-in-One Contract: Justin DeaBggis", and "Templates:" with the text "Select Template(s)". A "Save" button is at the bottom right. Red arrows point to the "Name:" and "Description:" fields. In the background, a table lists various forms and their categories.

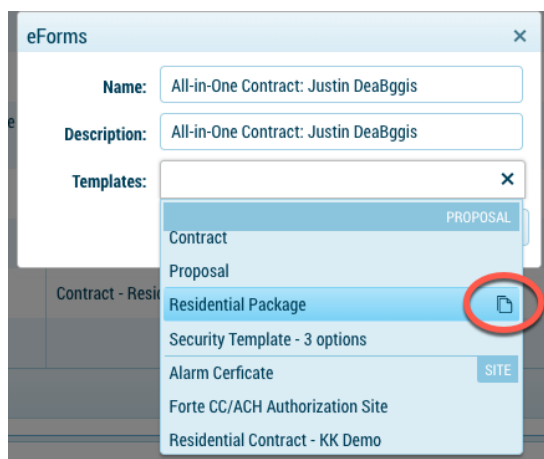
Form Name	Category	Integration	Form Type
Authorization Form	Contract - Residential	SedonaOffice	Customer
icate		SedonaOffice	Site
it Customer	New Customer Form	AlarmBiller	Customer
tract			Proposal
H Authorization Site			Proposal
			Site
			Proposal
			Site
Contract - KK Demo			Proposal
Template - 3 options	Contract - Residential	AlarmBiller	Proposal
s/zones/call list		AlarmBiller	System

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

The screenshot shows the "eForms" modal dialog with the "Templates:" dropdown menu open. A red arrow points to the "ACH Porte Form" option, which is highlighted. The dropdown menu also lists "AlarmPermit", "Contract", "Contract", "Proposal", "Residential Package", and "Security Template - 3 options". The "CUSTOMER" and "PROPOSAL" tabs are visible at the top of the dropdown. In the background, a table lists various forms and their categories.

Form Name	Category	Integration	Form Type
ustomer	New Customer Form	AlarmBiller	Customer
			Proposal
uthorization Site			Proposal
			Site
			Proposal
			Site
tract - KK Demo			Proposal
te - 3 options	Contract - Resi		Proposal
nes/call list			System

5. Select the template with the package icon.



The screenshot shows the 'eForms' application window. The 'Name' and 'Description' fields are both set to 'All-in-One Contract: Justin DeaBggis'. The 'Templates' dropdown menu is open, displaying a list of template options. The 'Residential Package' option is highlighted in blue, and a red circle is drawn around a document icon to its right. The list of templates includes: Contract, Proposal, Residential Package, Security Template - 3 options, Alarm Certificate, Forte CC/ACH Authorization Site, and Residential Contract - KK Demo. The 'PROPOSAL' and 'SITE' tabs are visible at the top of the dropdown menu.

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

eForm Delivery Setup - Deliver System

History ☐ Push Document ?

Preview Delete Send

Undo Redo

Cancel Changes Save Changes

Stages ? ☐ Sent ☐ Rejected ☐ Complete

Add Stage

Stage Name: Subject:

Stage 1 Residential Contract: Justin DeBaggi

Add Recipient ☐ Override Email Body

Email	Name	
Justin@perennialsoftware.cr	Marks, Michael	Delete

Add Stage

Details

Name Residential Contract: Justin DeBaggis

Description Residential Contract: Justin DeBaggis

Expires On 2/13/2018

Forms

Add Form

	Form Name	Description	
5 Assign	Residential Contrac	Residential Contrac	Edit Delete

Email

Subject: ?

Residential Contract: Justin DeBaggis

Body: ?

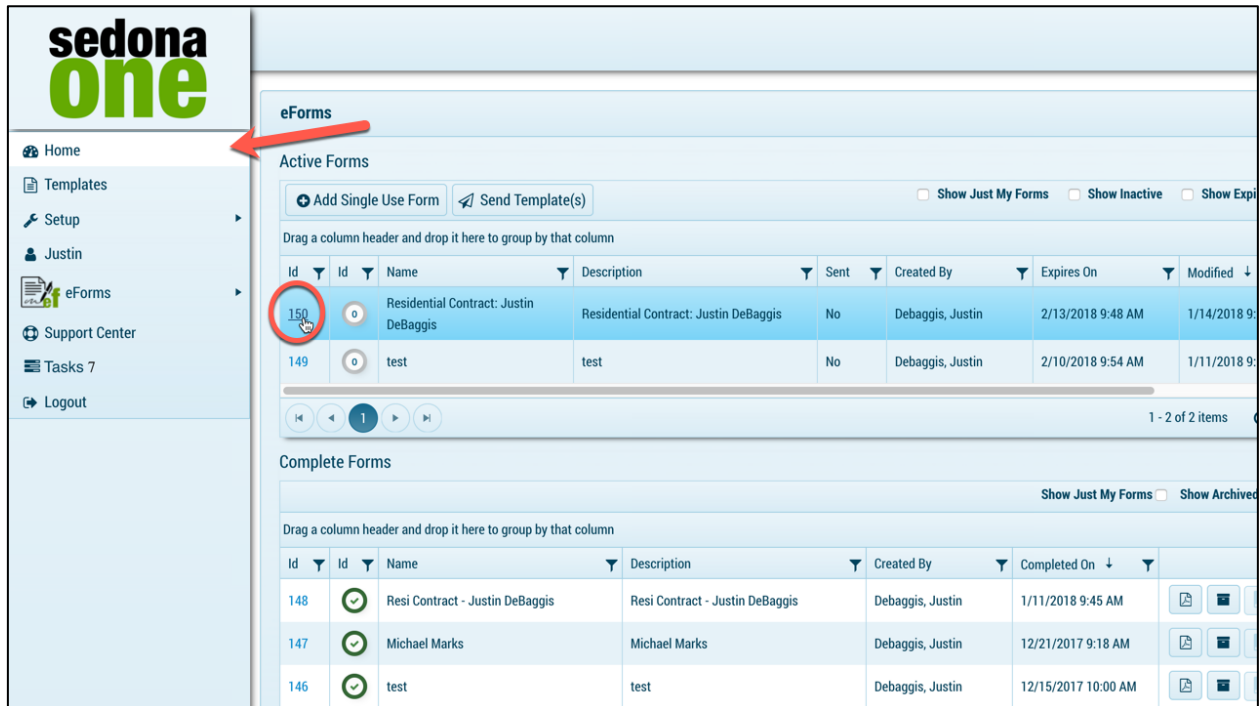
B I U A ▼

Format ▼

(inherited font) (inherited size)

@RecipientName,
Please review and sign @DocumentName.
Thank You,
@SenderName

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



The screenshot shows the SedonaOne eForms interface. On the left is a navigation menu with links: Home, Templates, Setup, Justin, eForms, Support Center, Tasks 7, and Logout. The main content area is titled 'eForms' and contains two sections: 'Active Forms' and 'Complete Forms'. The 'Active Forms' section has a table with columns: Id, Name, Description, Sent, Created By, Expires On, and Modified. The first row is highlighted in blue and has its 'Id' (150) circled in red. The 'Complete Forms' section also has a table with similar columns, showing three completed forms.

Id	Name	Description	Sent	Created By	Expires On	Modified
150	Residential Contract: Justin DeBaggis	Residential Contract: Justin DeBaggis	No	Debaggis, Justin	2/13/2018 9:48 AM	1/14/2018 9:48 AM
149	test	test	No	Debaggis, Justin	2/10/2018 9:54 AM	1/11/2018 9:54 AM

Id	Name	Description	Created By	Completed On
148	Resi Contract - Justin DeBaggis	Resi Contract - Justin DeBaggis	Debaggis, Justin	1/11/2018 9:45 AM
147	Michael Marks	Michael Marks	Debaggis, Justin	12/21/2017 9:18 AM
146	test	test	Debaggis, Justin	12/15/2017 10:00 AM

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.



The screenshot shows the SedonaOne eForms interface. On the left is a navigation menu with links: Home, Templates, Setup, Justin, eForms, Support Center, Tasks 7, and Logout. The main content area is titled 'eForms' and contains a 'History' button circled in red. Below the 'History' button are 'Undo' and 'Redo' buttons. The 'Stages' section shows a table with columns: Stage Name, Subject, and Add Recipient. The first row is 'Stage 1' with subject 'Residential Contract: Justin DeBaggis'.

Stage Name	Subject	Add Recipient
Stage 1	Residential Contract: Justin DeBaggis	<input type="button" value="Add Recipient"/>

Tracking History for ✕

Action	Message	User	Date
▶ Update	Document PDF push complete	AlarmBiller, AlarmBiller	1/11/2018 9:45:50 AM
▶ Update	Setting Sync flag for document push	Debaggis, Justin	1/11/2018 9:45:49 AM
▶ Update	All recipients have accepted the document	Marks, Michael	1/11/2018 9:45:25 AM
➤ Update	Recipient: Marks, Michael has accepted the user agreement.	Marks, Michael	1/11/2018 9:44:49 AM

Action	Description	Old Value	New Value
➤ Update	Recipient: Marks, Michael has accepted the user agreement.		
	Accepted Signature Terms		1/11/2018 9:44:49 AM
	IP Address		"147.0.193.18"
	Global Position		"(\accuracy\":65,\"alti...

▶ Update	Stage #1 has been sent.	Debaggis, Justin	1/11/2018 9:43:35 AM
▶ Update	Package Instance was Updated	Debaggis, Justin	1/11/2018 9:43:08 AM
▶ Add	Package Instance was Added	Debaggis, Justin	1/11/2018 9:42:04 AM

⏪

⏴

1

⏵

⏩

1 - 7 of 7 items ↻

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**.

The screenshot shows the SedonaOne eForms interface. On the left is a sidebar with navigation links: Home, Templates, Setup, Justin, eForms, Support Center, Tasks 7, and Logout. The main content area has a top bar with 'History' and 'Push Document' buttons, the latter of which is circled in red. Below this are 'Undo' and 'Redo' buttons. The 'Stages' section shows a legend for 'Sent' (blue), 'Rejected' (pink), and 'Complete' (green). There is an 'Add Stage' button. Below that, a form for adding a stage is visible, with fields for 'Stage Name' (containing 'Stage 1') and 'Subject' (containing 'Residential Contract: Justin DeBaggis'). There is also an 'Add Recipient' button and an 'Override Email Body' checkbox.

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.

The screenshot shows the 'Stages' configuration interface. A red arrow points to the '+ Add Stage' button in the 'Stages' section. The 'Details' section on the right contains fields for 'Name', 'Description', and 'Expires On'. The 'Forms' section on the right contains an 'Add Form' button and a table of forms. The 'Email' section at the bottom contains a 'Subject' field.

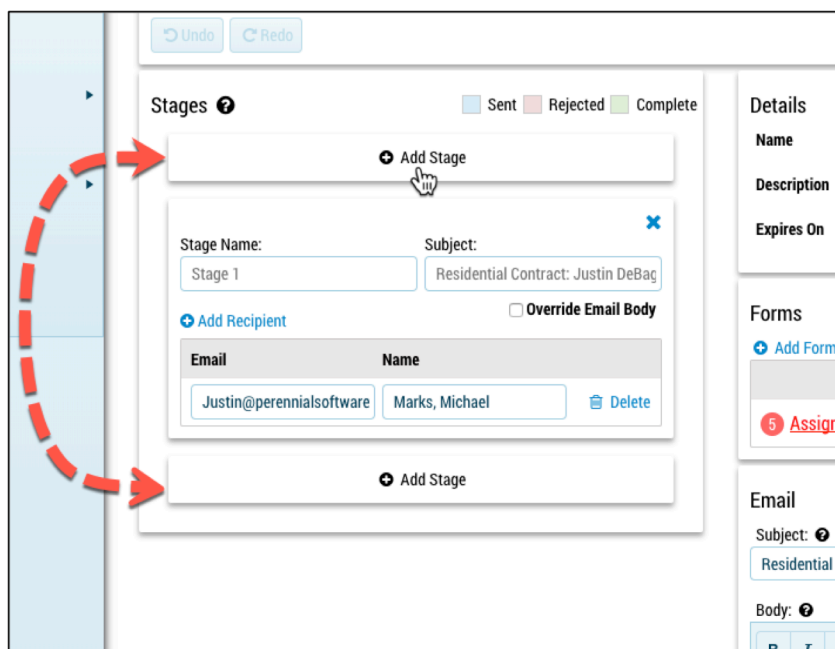
Stages Components

- **+ 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.

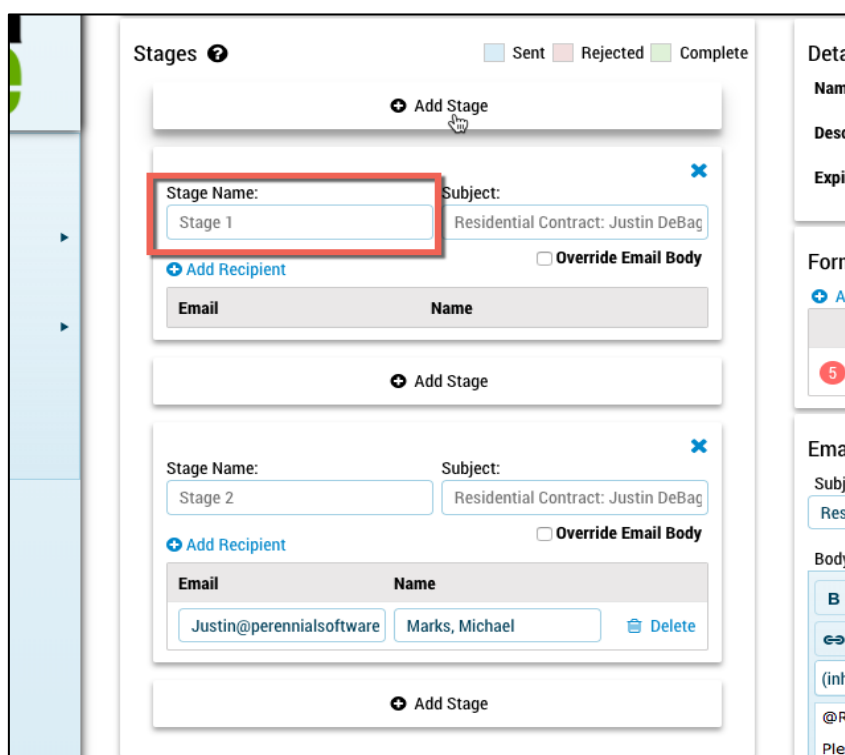
Adding Stages

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.

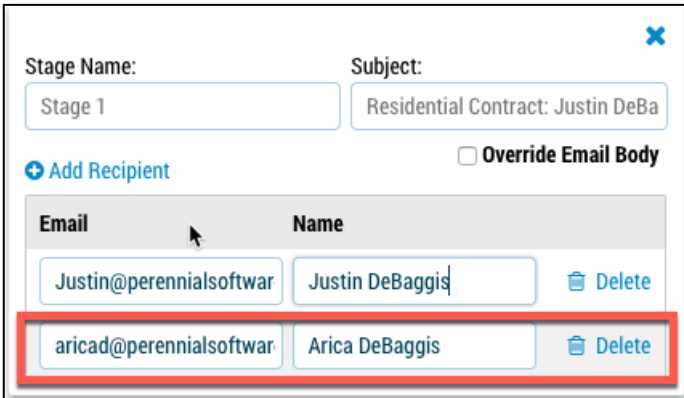
Adding Recipients

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



Stage Name: Stage 1 Subject: Residential Contract: Justin DeBa

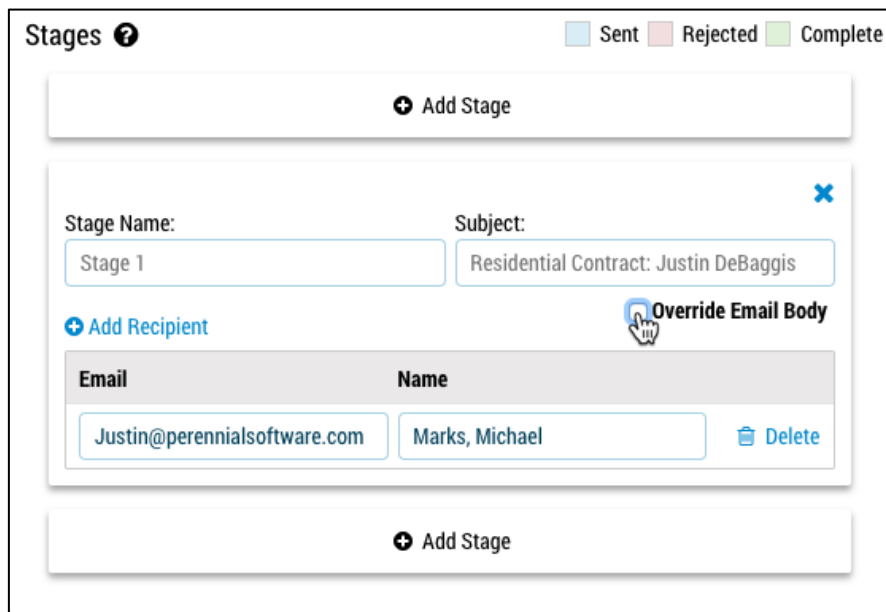
+ Add Recipient ☐ Override Email Body

Email	Name	
Justin@perennialsoftwar	Justin DeBaggis	Delete
aricad@perennialsoftwar	Arica DeBaggis	Delete

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**.



Stages ? Sent Rejected Complete

+ Add Stage

Stage Name: Stage 1 Subject: Residential Contract: Justin DeBaggis

+ Add Recipient ☒ Override Email Body

Email	Name	
Justin@perennialsoftware.com	Marks, Michael	Delete

+ Add Stage

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

Stage 1 Residential Contract: Justin DeBaggis

Body: ☒ Override Email Body

Rich text editor toolbar: Bold (B), Italic (I), Underline (U), Text Color (A), Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink.

Paragraph dropdown menu, Insert icon.

Font dropdown: (inherited font), Font Size dropdown: (inherited size).

Email body text:
Michael,
Thank you for reaching out, provid
Thank You,
@SenderName

+ Add Recipient

Email	Name	
Justin@perennialsoftware.com	Marks, Michael	Delete

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.

Buttons: Preview, Delete, Send, Cancel Changes, Save Changes.

Details

Name	Residential Contract: Justin DeBaggis
Description	Residential Contract: Justin DeBaggis
Expires On	2/13/2018

Forms

+ Add Form

	Form Name	Description	
5 Assign	Residential Contract - Kf	Residential Contract - Kf	Edit Delete

Delete

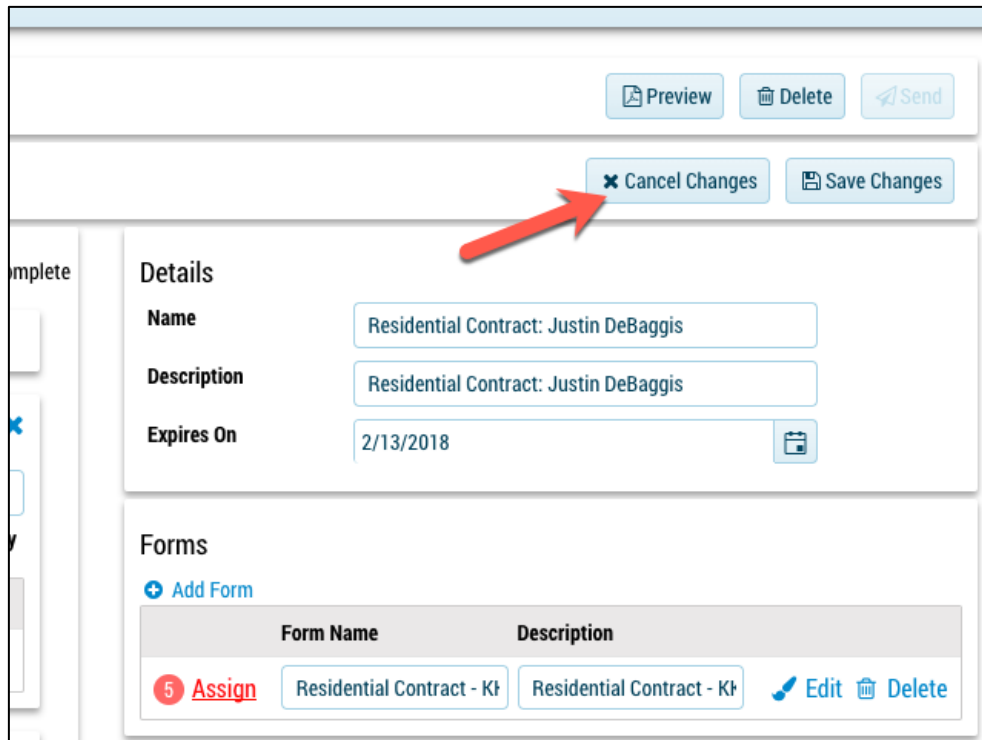
This will inactivate the form and will add it to the inactive queue on the home page. To permanently delete navigate to home > inactive and select the delete button.

The screenshot shows the SedonaOne eForms interface. At the top, there are four buttons: 'Preview', 'Delete', 'Send', and 'Cancel Changes'. A red arrow points to the 'Delete' button. Below these buttons are two more buttons: 'Cancel Changes' and 'Save Changes'. The main content area is divided into two sections: 'Details' and 'Forms'. The 'Details' section contains three fields: 'Name' (Residential Contract: Justin DeBaggis), 'Description' (Residential Contract: Justin DeBaggis), and 'Expires On' (2/13/2018). The 'Forms' section contains a table with two columns: 'Form Name' and 'Description'. The table has one row with the following data: 'Residential Contract - Kf' and 'Residential Contract - Kf'. To the left of the table, there is a red circle with the number '5' and the word 'Assign'. To the right of the table, there are two buttons: 'Edit' and 'Delete'.

Form Name	Description
Residential Contract - Kf	Residential Contract - Kf

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.



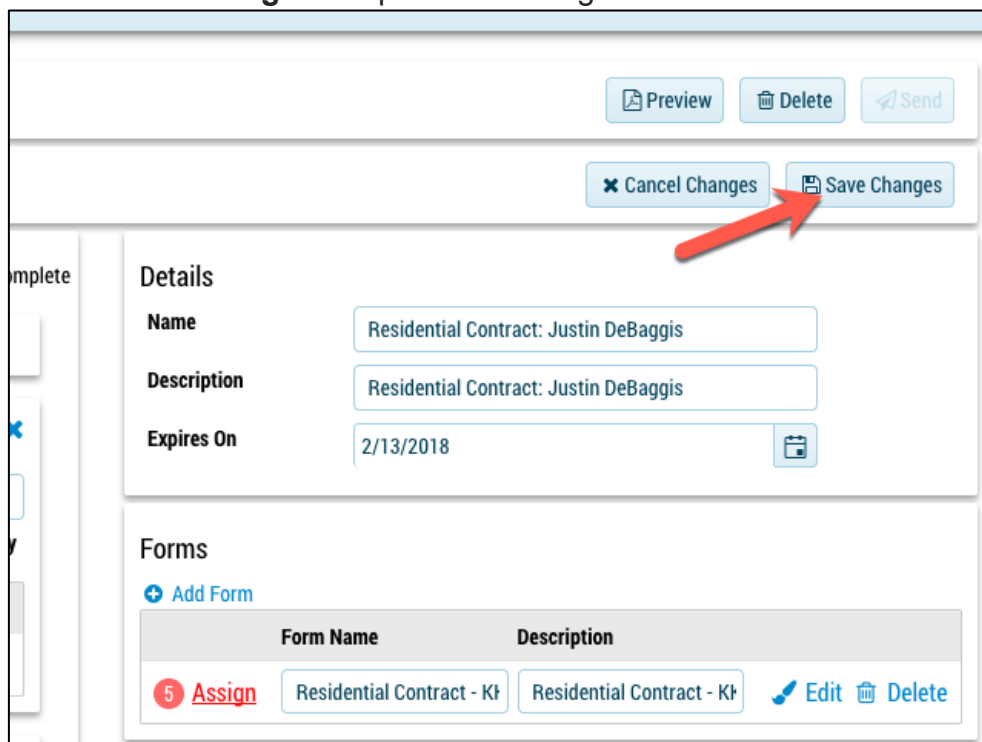
The screenshot shows the SedonaOne eForms interface. At the top, there are buttons for 'Preview', 'Delete', and 'Send'. Below these, there are buttons for 'Cancel Changes' and 'Save Changes'. A red arrow points to the 'Cancel Changes' button. The 'Details' section contains fields for 'Name', 'Description', and 'Expires On'. The 'Forms' section shows a table with columns 'Form Name' and 'Description', and a row for 'Residential Contract - Kt' with an 'Assign' button and 'Edit' and 'Delete' icons.

Details	
Name	Residential Contract: Justin DeBaggis
Description	Residential Contract: Justin DeBaggis
Expires On	2/13/2018

Forms	
Form Name	Description
5 Assign Residential Contract - Kt	Residential Contract - Kt

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.



The screenshot shows the SedonaOne eForms interface. At the top, there are buttons for 'Preview', 'Delete', and 'Send'. Below these, there are buttons for 'Cancel Changes' and 'Save Changes'. A red arrow points to the 'Save Changes' button. The 'Details' section contains fields for 'Name', 'Description', and 'Expires On'. The 'Forms' section shows a table with columns 'Form Name' and 'Description', and a row for 'Residential Contract - Kt' with an 'Assign' button and 'Edit' and 'Delete' icons.

Details	
Name	Residential Contract: Justin DeBaggis
Description	Residential Contract: Justin DeBaggis
Expires On	2/13/2018

Forms	
Form Name	Description
5 Assign Residential Contract - Kt	Residential Contract - Kt

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.

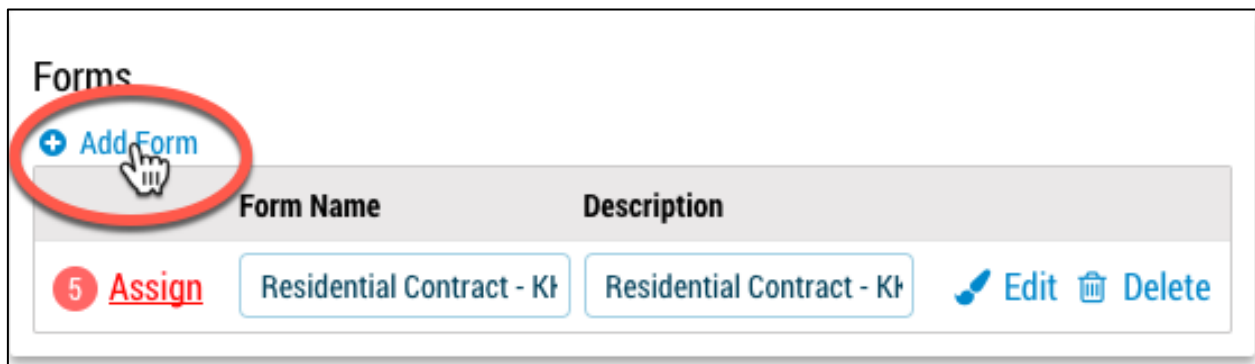
Forms Components



- **+Add Form:** this will show the library of eForms
- **Assign Recipients:** Assign the recipients 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

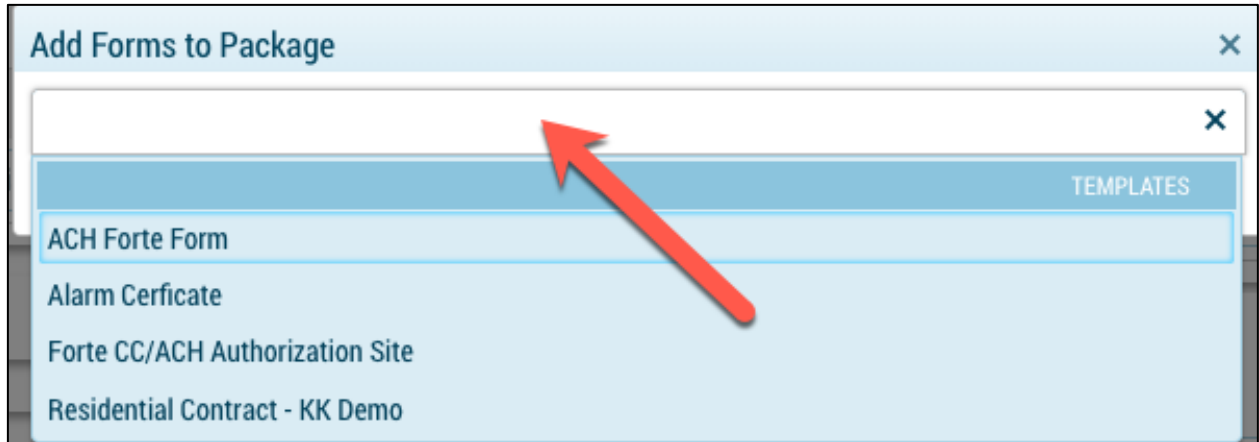
To add an eForm follow the instructions below:

1. Select **+Add Form**.

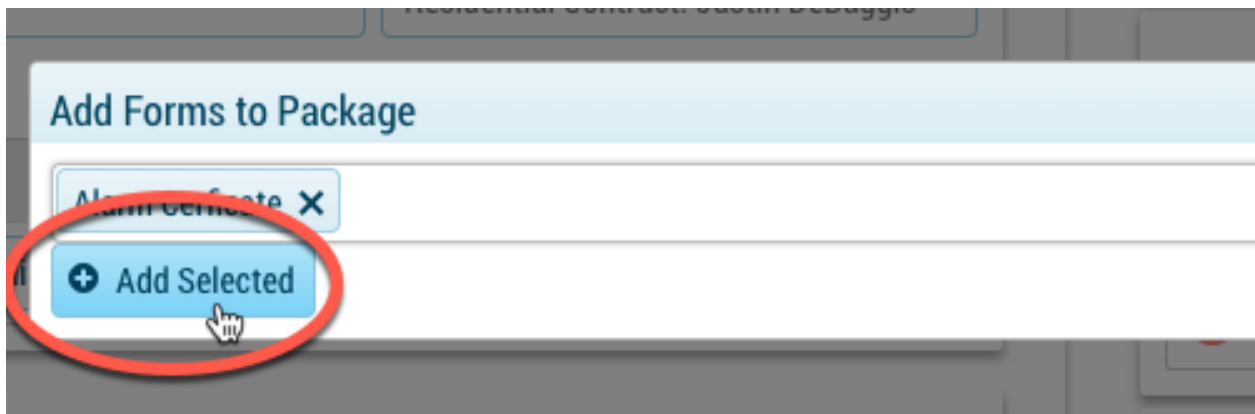


Forms	
Form Name	Description
5 Assign Residential Contract - Kt	Residential Contract - Kt   Edit Delete

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.

Forms

[+ Add Form](#)

Form Name	Description	
5 Assign	Residential Contract - Kt	Residential Contract - Kt Edit Delete
3 Assign	Forté CC/ACH Authoriza	Forté CC/ACH Authoriza Edit Delete

2. Select the recipient you would like to assign to a field(s).

Note: There may be multiple recipients available to assign to fields.

1 Unassigned Field / 4 Unedited Fields

Stage 1- Recipients

Marks, Michael
Justin@perenn...ware.com

ACME Alarms
5001 E. Main St.
New York, NY 10011
(212) 555-1000

STANDARD RESIDENTIAL SECURITY AGREEMENT

Date:

Subscriber's Name: Telephone No.:

Address: Cell Phone No.:

1. ALARM COMPANY NAME (hereinafter referred to as "ABB NAME" or "ALARM COMPANY") agrees to sell, install, and Subscriber's premises, and Subscriber agrees to buy, an electronic security and or fire alarm system, consisting of the following equipment and services:

Purchase Price: \$

Taxes: \$

Total: \$

Down Payment: \$ Balance due upon completion of installation: \$

Approximate date work to begin: Estimated date work to be substantially completed:

2. DESCRIPTION OF SERVICES:

Check services provided:

☐ Monitoring ☐ Service ☐ Inspection ☐ Remote Subscriber Access/Cameras ☐ Alarm Service ☐ Alarm Signs

☐ Guard Response ☐ Other: (See Attached Schedule of Equipment and Services.)

3. CHECK BOX FOR APPROPRIATE SERVICES:

SERVICES AND CHARGES: Only services selected are included:

(a) CENTRAL STATION MONITORING: Subscriber agrees to pay ALARM COMPANY:

(i) The sum of \$ plus tax for the installation and programming of the software and communication device

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

Down Payment: \$ _____ Balance due upon completion of installation: \$ _____

Approximate date work to begin: Estimated date work to be substantially completed:

2. DESCRIPTION OF SERVICES:
Check services provided:

☒ Monitoring ☒ Service ☒ Inspection ☒ MM Subscriber Access/Cameras ☒ Remote Access

☒ Guard Response ☐ Other: (See Attached Schedule of Equipment and Services.)

3. CHECK BOX FOR APPROPRIATE SERVICES:
SERVICES AND CHARGES: Only services selected are included:

☒ (a) **CENTRAL STATION MONITORING:** Subscriber agrees to pay ALARM COMPANY:

☒ (i) The sum of \$ _____ plus tax for the installation and programming of the software from the alarm panel if not already installed.

☒ (ii) The sum of \$ _____, plus tax, per month, payable _____ in advance for the term of this agreement commencing on the first day of the month next succeeding the date hereof, payments being due on the first of the month.

☐ (b) **REMOTE SUBSCRIBER ACCESS / VIDEO STREAMING DATA [VSD] / CLOSED CIRCLE MONITORING:** Subscriber agrees to pay ALARM COMPANY the sum of \$ _____ plus tax, per month, payable _____ in advance for the term of this agreement commencing on the first day of the month next succeeding the date hereof, payments being due on the first of the month.

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

1 Unassigned Field / 4 Unedited Fields Save

Licensed by the N.Y. State Department of State
License No.:

ACME Alarms
5001 E. Main St.
New York, NY 10011
(212) 555-1000

STANDARD RESIDENTIAL SECURITY AGREEMENT

or Name] Telephone No.: [Phone 1]

1] Cell Phone No.:

ACME (hereinafter referred to as "ABB NAME" or "ALARM COMPANY") agrees to sell, install, and program at the subscriber's request an electronic security and/or fire alarm system, consisting of the following equipment: (See attached Schedule of Equipment and Services.)

Price: \$

Down Payment: \$ _____ Balance due upon completion of installation: \$ _____

Approximate date work to begin: Estimated date work to be substantially completed:

Assignable Fields

- Assign All
- Required
 - Signature 0
- Not Required
 - Cell Phone
 - Checkbox Data 4
 - Monitoring
 - Checkbox Data 1
 - Checkbox Data 2

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

Assignable Fields

Assign All

Required

Signature 0
■ Marks, Michael

Not Required

Cell Phone

Checkbox Data 4

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License No.:

IS

AGREEMENT

Telephone No.: [Phone 1]

Cell Phone No.: []

ARM COMPANY") agrees to sell, install, and program at
rm system, consisting of the following equipment: (See

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

Assignable Fields

Assign All

Required

Signature 0
■ Marks, Michael

Not Required

Cell Phone

Checkbox Data 4

Licensed by the N.Y. State Department of State
License No.:

ms

TY AGREEMENT

Telephone No.: [Phone 1]

Cell Phone No.: []

ARM COMPANY") agrees to sell, install, and program at
e alarm system, consisting of the following equipment: (See

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

ed Fields

Save

Assignable Fields

Assign All

Required

Signature 0
Marks, Michael

Not Required

Cell Phone

Checkbox Data 4

Licensed by the N.Y. State Department of State
License No.:

ms

TY AGREEMENT

Telephone No.: [Phone 1]

Cell Phone No.: []

ARM COMPANY") agrees to sell, install, and program at
alarm system, consisting of the following equipment: (See

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.

Close Undo Redo

4 Unedited Fields

Save

Sent Complete Rejected

Stage 1 - Recipients

Marks, Michael
Justin@perennialsoftware.com

ACME Alarms
5001 E. Main St.
New York, NY 10011
(212) 555-1000

STANDARD RESIDENTIAL SECURITY AGREEMENT

Date: []

Subscriber's Name: [Customer Name] Telephone No.: [Phone 1]

Address: [Address 1] Cell Phone No.: []

1. ALARM COMPANY NAME (hereinafter referred to as "ABB NAME" or "ALARM COMPANY") agrees to sell, install, and program at Subscriber's premises, and Subscriber agrees to buy, an electronic security and or fire alarm system, consisting of the following equipment: (See Attached Schedule of Equipment and Services.)

Purchase Price: \$ []

Taxes: \$ []

Total: \$ []

Down Payment: \$ [] Balance due upon completion of installation: \$ []

Approximate date work to begin: [] Estimated date work to be substantially completed: []

2. DESCRIPTION OF SERVICES:
Check services provided:
Monitoring [] Service [] Inspection [] Remote Subscriber Access/Cameras [] Full-time Service [] Signal Verification []
Emergency Response [] Other: (See Attached Schedule of Equipment and Services.)

3. CHECK BOX FOR APPROPRIATE SERVICES:
SERVICES AND CHARGES: Only services selected are included:
a) CENTRAL STATION MONITORING: Subscriber agrees to pay ALARM COMPANY:
(i) The sum of \$ [] plus tax for the installation and programming of the software and communication devices if separate from the alarm panel if not already installed.
(ii) The sum of \$ [] plus tax, per month, payable in advance for the monitoring of the Security System for

Assignable Fields

Assign All

Required

Not Required

Form Data

Required

Today's Date

Central Station
(i)
(ii)
Clear

Date of Work

Purchase Price:

Not Required

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

AGREEMENT

Telephone No.: [Phone 1]

Cell Phone No.:

"ALARM COMPANY") agrees to sell, install, and program at
arm system, consisting of the following equipment: (See

pletion of installation: \$ _____

e substantially completed: _____

eras ☐ Runner Service ☐ Alarm Signal Verification
(ices.)

Form Data

Required

Today's Date

Central Station
☐ (i)
☐ (ii)

Date of Work

Purchase Price:

Not Required

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

Security

011

0

SECURITY AGREEMENT

Telephone No.: [Phone 1]

Cell Phone No.:

"ALARM COMPANY") agrees to sell, install, and program at
or fire alarm system, consisting of the following equipment: (See

on completion of installation: \$ _____

ork to be substantially completed: _____

cess/Cameras ☐ Runner Service ☐ Alarm Signal Verification
(t and Services.)

Form Data

Required

Today's Date

Central Station
☐ (i)
☐ (ii)

Date of Work

Purchase Price:

Not Required

☐ Checkbox Data 5

☐ Checkbox Data 3

Cell Phone:

☐ Checkbox Data 4

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

The screenshot displays a two-paneled interface. The left pane contains a document template with several lines of text, each followed by a blank line for input. The right pane is a form editor with a 'Not Required' section highlighted by a red border. This section contains a list of checkboxes: 'Checkbox Data 5', 'Checkbox Data 3', 'Checkbox Data 4', 'Checkbox Data 1', 'Checkbox Data 2', 'Monitoring', and 'Checkbox Data 6'. Above this list is a 'Cell Phone:' label and an empty text box. A mouse cursor is pointing at a dropdown arrow in the top right corner of the 'Not Required' section. Above the 'Not Required' section is a 'Purchase Price:' label and an empty text box.

ata Storage and Retrieval

\$_____ plus tax, per month, payable
tion as a service to be provided, or if

rovides for service on a per call basis,
ligated to.....

he sum of \$_____ plus tax, per
the month next succeeding the date

onth, payable_____ in advance
e an annual inspection of the security

per month, payable_____ in
s per year.

nent method) \$_____ per month,
onse).

ubscriber performs this agreement for
scode to the CPU software or change

e years and shall automatically renew
ase all charges by an amount not to

Purchase Price:

Not Required

☐ Checkbox Data 5

☐ Checkbox Data 3

Cell Phone:

☐ Checkbox Data 4

☐ Checkbox Data 1

☐ Checkbox Data 2



☐ Monitoring

☐ Checkbox Data 6

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

(212) 555-1000


STANDARD RESIDENTIAL SECURITY AGREEMENT

Date:  

Subscriber's Name: [Customer Name] Telephone No.: [Phone]

Address: [Address 1] Cell Phone No.:



1. ALARM COMPANY NAME (hereinafter referred to as "ABB NAME" or "ALARM COMPANY") agrees to sell, install, and program at Subscriber's premises, and Subscriber agrees to buy, an electronic security and or fire alarm system, consisting of the following equipment: (See Attached Schedule of Equipment and Services.)

Purchase Price: \$ 

Taxes: \$

Total: \$

Down Payment: \$ Balance due upon completion of installation: \$

Approximate date work to begin:   Estimated date work to be substantially completed:

2. DESCRIPTION OF SERVICES: Check services provided:

	Su	Mo	Tu	We	Th	Fr	Sa
<input checked="" type="checkbox"/> Monitoring							
<input checked="" type="checkbox"/> Service							
<input checked="" type="checkbox"/> Guard Response							

3. CHECK BOX FOR APPROPRIATE SERVICES AND CHARGES:

(a) CENTRAL STATION MONITORING: ☒ (i) The sum of \$ plus tax for the installation and programming of the software and communication devices if separate from the alarm panel if not already installed.

(ii) The sum of \$ plus tax for the installation and programming of the software and communication devices if separate from the alarm panel if not already installed.

(b) REMOTE SUBSCRIPTION: ☐ pay ALARM COMPANY the sum of \$ plus tax for the installation and programming of the software and communication devices if separate from the alarm panel if not already installed.

☐ Local DVR ☐ Central Station Remote Video Monitoring for Streaming Video Data

Access/Cameras: ☐ Runner Service: ☐ Alarm Signal Verification: ☐

ALARM COMPANY:

in advance for the monitoring of the Security System commencing on the date hereof, and continuing monthly thereafter.

[VSD] / CLOSED CIRCUIT TV [CCTV]: Subscriber agrees to pay in advance for the term of this agreement.

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

Close Undo Redo Done Save

Complete Rejected



1-Recipients

arks, Michael
@perennialsoftware.com

ACME Alarms
5001 E. Main St.
New York, NY 10011
(212) 555-1000

Licensed by the N.Y. State Department of State
License No.:


STANDARD RESIDENTIAL SECURITY AGREEMENT

Date: 1/17/2018  

Subscriber's Name: [Customer Name] Telephone No.: [Phone 1]

Address: [Address 1] Cell Phone No.:



1. ALARM COMPANY NAME (hereinafter referred to as "ABB NAME" or "ALARM COMPANY") agrees to sell, install, and program at Subscriber's premises, and Subscriber agrees to buy, an electronic security and or fire alarm system, consisting of the following equipment: (See Attached Schedule of Equipment and Services.)

Purchase Price: \$ 200 

Taxes: \$

Total: \$

Down Payment: \$ Balance due upon completion of installation: \$

Approximate date work to begin: 1/17/2018   Estimated date work to be substantially completed:

2. DESCRIPTION OF SERVICES: Check services provided:

	Su	Mo	Tu	We	Th	Fr	Sa
<input checked="" type="checkbox"/> Monitoring							
<input checked="" type="checkbox"/> Service							
<input checked="" type="checkbox"/> Guard Response							

3. CHECK BOX FOR APPROPRIATE SERVICES:

(a) CENTRAL STATION MONITORING: ☒ Only services selected are included:

(i) The sum of \$ plus tax for the installation and programming of the software and communication devices if separate from the alarm panel if not already installed.

(ii) The sum of \$ plus tax for the installation and programming of the software and communication devices if separate from the alarm panel if not already installed.

☐ Local DVR ☐ Central Station Remote Video Monitoring for Streaming Video Data

Access/Cameras: ☐ Runner Service: ☐ Alarm Signal Verification: ☐

ALARM COMPANY:

in advance for the monitoring of the Security System commencing on the date hereof, and continuing monthly thereafter.

[VSD] / CLOSED CIRCUIT TV [CCTV]: Subscriber agrees to pay in advance for the term of this agreement.

Assignable Fields

Assign All


Required <

Not Required <

Form Data

Required v

Today's Date

1/17/2018 


Central Station

☒ (i)

☐ (ii)

Clear

Date of Work

1/17/2018 

Purchase Price:

200

Not Required v

☐ Checkbox Data 5

☐ Checkbox Data 3

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

Close Undo Redo Done Save

Complete Rejected

1- Recipients

arks, Michael

@perennialsoftware.com

Assigned All

Not Required

Form Data

Required

Today's Date

1/17/2018

Central Station

(i)

(ii)

Clear

Date of Work

1/17/2018

Purchase Price:

200

Not Required

Checkbox Data 5

Checkbox Data 3

AB-In-One Residential Security State Agreement

ARMED-RESIDENTIAL, Inc. Tel No: (516) 767-0000

KRECHENBAUM CONTRACTORS Copyright 107

Licensed by the N.Y. State Department of State

License No.:

ACME Alarms

5001 E. Main St.

New York, NY 10011

(212) 555-1000

STANDARD RESIDENTIAL SECURITY AGREEMENT

Date: 1/17/2018

Subscriber's Name: [Customer Name] Telephone No.: [Phone 1]

Address: [Address 1] Cell Phone No.:

1. ALARM COMPANY NAME (hereinafter referred to as "ABB NAME" or "ALARM COMPANY") agrees to sell, install, and program at Subscriber's premises, and Subscriber agrees to buy, an electronic security and or fire alarm system, consisting of the following equipment: (See Attached Schedule of Equipment and Services.)

Purchase Price: \$ 200

Taxes: \$

Total: \$

Down Payment: \$ Balance due upon completion of installation: \$

Approximate date work to begin: 1/17/2018 Estimated date work to be substantially completed:

2. DESCRIPTION OF SERVICES:

Check services provided:

Monitoring Service Inspection Remote Subscriber Access/Cameras Runner Service Alarm Signal Verification

Signal Response Other: (See Attached Schedule of Equipment and Services.)

3. CHECK BOX FOR APPROPRIATE SERVICES:

SERVICES AND CHARGES: Only services selected are included:

(a) CENTRAL STATION MONITORING: Subscriber agrees to pay ALARM COMPANY:

(i) The sum of \$ plus tax for the installation and programming of the software and communication devices if separate from the alarm panel if not already installed.

(ii) The sum of \$, plus tax, per month, payable in advance for the monitoring of the Security System under this agreement commencing on the first day of the month next succeeding the date hereof, and continuing monthly thereafter on the first of the month.

REMOTE SUBSCRIBER ACCESS / VIDEO STREAMING DATA [VSD] / CLOSED CIRCUIT TV [CCTV]: Subscriber agrees to pay ALARM COMPANY the sum of \$ plus tax, per month, payable in advance for the term of this agreement for the following services to be provided:

Local DVR Central Station Remote Video Monitoring for Streaming Video Data

Video Clips Monitored Upon Alarm Activation Only Verification video clips Data Storage and Retrieval

Remote Access By Subscriber Other (describe):

ALARM SIGNAL VERIFICATION: Subscriber agrees to pay ALARM COMPANY the sum of \$ plus tax, per month, payable in advance for the term of this agreement. If Subscriber selects Alarm Signal Verification as a service to be provided, Alarm Signal Verification is required by law. ALARM COMPANY

< 1/2 >

Multiple Pages

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

SERVICES AND CHARGES: Only services selected are included:

CENTRAL STATION MONITORING: Subscriber agrees to pay ALARM COMPANY:

(i) The sum of \$ plus tax for the installation and programming of the software and communication devices if separate from the alarm panel if not already installed.

(ii) The sum of \$, plus tax, per month, payable in advance for the monitoring of the Security System under this agreement commencing on the first day of the month next succeeding the date hereof, and continuing monthly thereafter on the first of the month.

REMOTE SUBSCRIBER ACCESS / VIDEO STREAMING DATA [VSD] / CLOSED CIRCUIT TV [CCTV]: Subscriber agrees to pay ALARM COMPANY the sum of \$ plus tax, per month, payable in advance for the term of this agreement for the following services to be provided:

Local DVR Central Station Remote Video Monitoring for Streaming Video Data

Video Clips Monitored Upon Alarm Activation Only Verification video clips Data Storage and Retrieval

Remote Access By Subscriber Other (describe):

ALARM SIGNAL VERIFICATION: Subscriber agrees to pay ALARM COMPANY the sum of \$ plus tax, per month, payable in advance for the term of this agreement. If Subscriber selects Alarm Signal Verification as a service to be provided, Alarm Signal Verification is required by law. ALARM COMPANY

< 1/2 >

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.

Forms

[+ Add Form](#)

	Form Name	Description	
Assigned	Residential Contract	Residential Contract	Edit Delete
Assigned	Forte CC/ACH Author	Forte CC/ACH Author	Edit Delete

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

ACME Alarms
 5001 E. Main St.
 New York, NY 10011
 (212) 555-1000

STANDARD RESIDENTIAL SECURITY AGREEMENT

Date: [Today's Date]

Subscriber's Name: [Customer Name] Telephone No.: [Phone 1]

Address: [Address 1] Cell Phone No.: [Cell Phone]

1. ALARM COMPANY NAME (hereinafter referred to as "ABB NAME" or "ALARM COMPANY") agrees to sell, install, and program at Subscriber's premises, and Subscriber agrees to buy, an electronic security and or fire alarm system, consisting of the following equipment: (See Attached Schedule of Equipment and Services.)

Purchase Price: \$ [Purchase]
 Taxes: \$
 Total: \$
 Down Payment: \$ Balance due upon completion of installation: \$

Approximate date work to begin: [Date of Work] Estimated date work to be substantially completed:

2. **DESCRIPTION OF SERVICES:**
 Check services provided:
☐ Monitoring ☐ Service ☐ Inspection ☐ Remote Subscriber Access/Cameras ☐ Runner Service ☐ Alarm Signal Verification
☐ Guard Response ☐ Other: (See Attached Schedule of Equipment and Services.)

3. **CHECK BOX FOR APPROPRIATE SERVICES:**
SERVICES AND CHARGES: Only services selected are included:
 (a) **CENTRAL STATION MONITORING:** Subscriber agrees to pay ALARM COMPANY:
 (i) The sum of \$ plus tax for the installation and programming of the software and communication devices if separate from the alarm panel if not already installed.
 (ii) The sum of \$ plus tax, per month, payable in advance for the monitoring of the Security System for the term of this agreement commencing on the first day of the month next succeeding the date hereof, and continuing monthly thereafter, all

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.

The screenshot shows the SedonaOne eForms interface. At the top, there is a toolbar with buttons: 'History', 'Push Document' (circled in red with a hand cursor), 'Preview', 'Delete', and 'Send'. Below the toolbar are 'Undo' and 'Redo' buttons, and 'Cancel Changes' and 'Save Changes' buttons. The main area is divided into two panels. The left panel, titled 'Stages', has a legend for 'Sent' (blue), 'Rejected' (pink), and 'Complete' (green). It includes an 'Add Stage' button and a form for 'Stage Name' (containing 'Stage 1') and 'Subject' (containing 'Residential Contract: Justin DeBaggi'). There is also an 'Add Recipient' button and a table with columns 'Email' and 'Name'. The table contains one row: 'Justin@perennialsoftware.c...' and 'Marks, Michael'. The right panel, titled 'Details', has fields for 'Name' (Residential Contract: Justin DeBaggi), 'Description' (Residential Contract: Justin DeBaggi), and 'Expires On' (2/13/2018). Below this is a 'Forms' section with an 'Add Form' button and a table with columns 'Form Name' and 'Description'. The table contains two rows: 'Assigned' with 'Forte CC/ACH Authoi' and 'Assigned' with 'Residential Contract'. At the bottom, there is an 'Email' section with a 'Subject' field.


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.

The screenshot shows the SedonaOne eForms interface with the 'History' button circled in red. A modal window titled 'Tracking History for' is open, displaying a table of actions. The table has columns: 'Action', 'Message', 'User', and 'Date'. The actions listed are: 'Update' (Package Instance was Updated), 'Update' (Package Instance was Updated), 'Update' (Package Instance was Updated), and 'Add' (Package Instance was Added). The user for all actions is 'Debaggi, Justin'. The dates are: '1/17/2018 1:46:23 PM', '1/17/2018 1:38:00 PM', '1/14/2018 9:56:28 AM', and '1/14/2018 9:48:33 AM'. The modal window also shows a pagination bar with '1 - 4 of 4 items' and a refresh button. The background interface is dimmed, showing the same toolbar and panels as the previous screenshot.

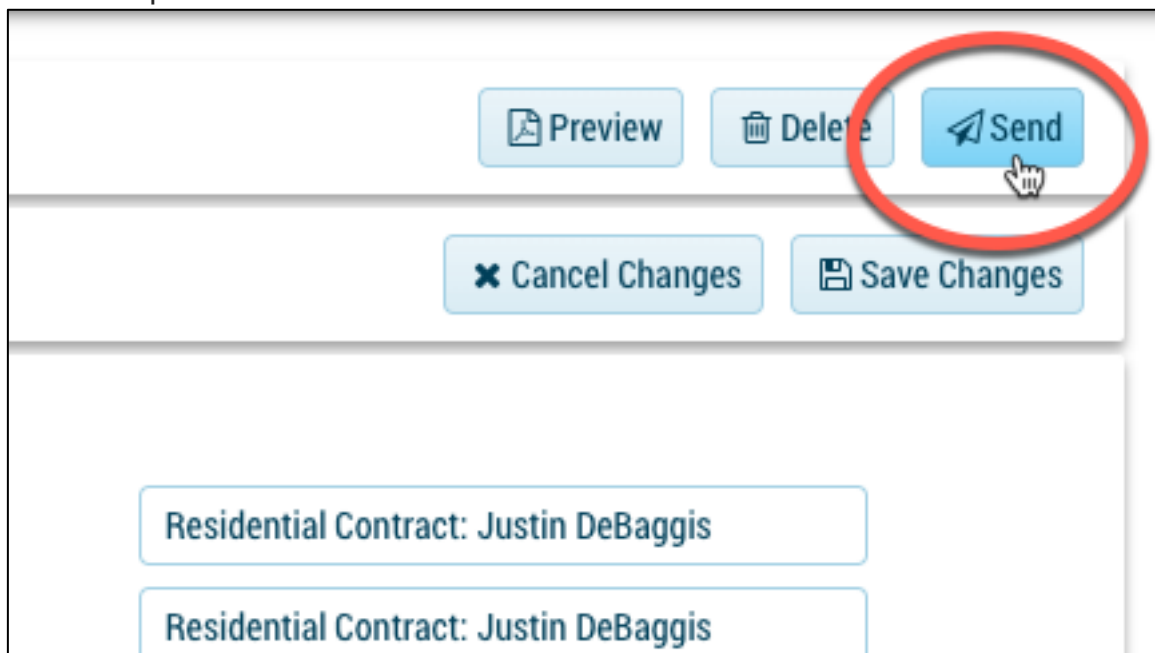
Send

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.



The screenshot shows the top section of the eForm interface. At the top, there is a red circle with the number '1' next to the word 'Assign' in red text. Below this, a green 'Assigned' status is visible. A tooltip message reads '1 Unassigned field and 0 blank required field.' The interface includes two buttons labeled 'Residential Contract' and two buttons labeled 'Forte CC/ACH Auth'. Below these, the word 'Email' is visible, followed by a 'Subject:' label and a small icon.

Once completed select **Send**.



The screenshot shows the bottom section of the eForm interface. At the top, there are three buttons: 'Preview', 'Delete', and 'Send'. The 'Send' button is circled in red. Below these are two buttons: 'Cancel Changes' and 'Save Changes'. At the bottom, there are two text boxes, both containing the text 'Residential Contract: Justin DeBaggis'.

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.

The screenshot shows the SedonaOne eForms interface. At the top, there are buttons for 'History', 'Push Document', 'Preview', and 'Delete'. Below these are 'Undo' and 'Redo' buttons, and 'Cancel Changes' and 'Save Changes' buttons. The main section is titled 'Stages' and includes a legend for 'Sent' (blue), 'Rejected' (red), and 'Complete' (green). A modal window is open for 'Stage 1' with the subject 'Residential Contract: Justin DeBaggi'. It has fields for 'Stage Name' and 'Subject', and an 'Add Recipient' button. Below this is a table with columns 'Email' and 'Name'. The first row shows 'Justin@perel' and 'Marks, Micha'. To the right of the table are buttons for 'Sign', 'Resend', and 'Delete'. The 'Sign' button is circled in red. Below the table is an 'Add Stage' button. To the right of the 'Stages' section is a 'Details' section with fields for 'Name', 'Description', and 'Expires On'. Below that is a 'Forms' section with a table of assigned forms. At the bottom is an 'Email' section with a 'Subject' field.

Form Name	Description
Assigned Forte CC/ACH Authorization Site	Forte CC/ACH Authorization Site - Blank
Assigned Residential Contract - KK Demo	Residential Contract - KK Demo

Resend

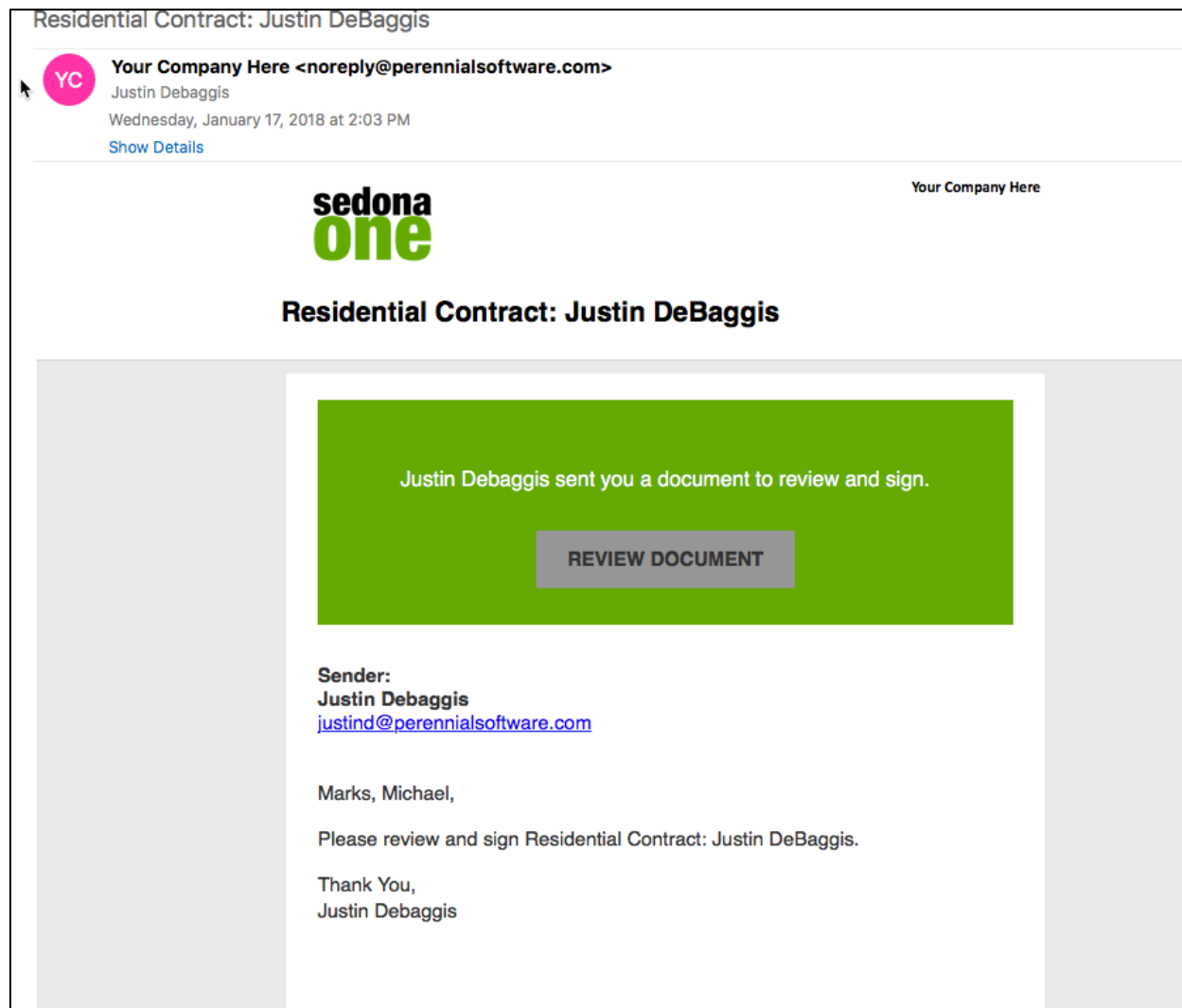
To manually resend the eForm to the recipient select **Resend** next to the stage and recipient.

This screenshot is identical to the one above, but with a red circle around the 'Resend' button instead of the 'Sign' button. The 'Sign' button is now disabled, indicated by a greyed-out icon.

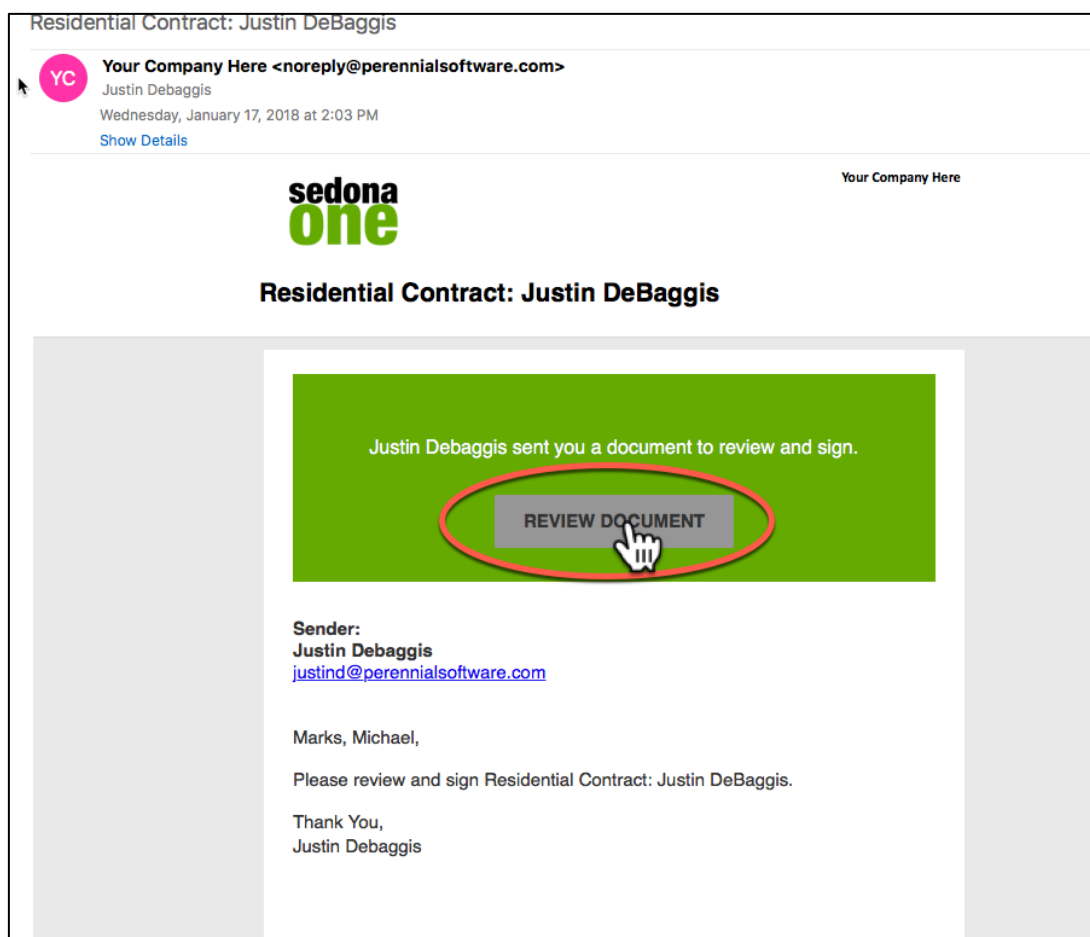
Recipient Completing Emailed eForms

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

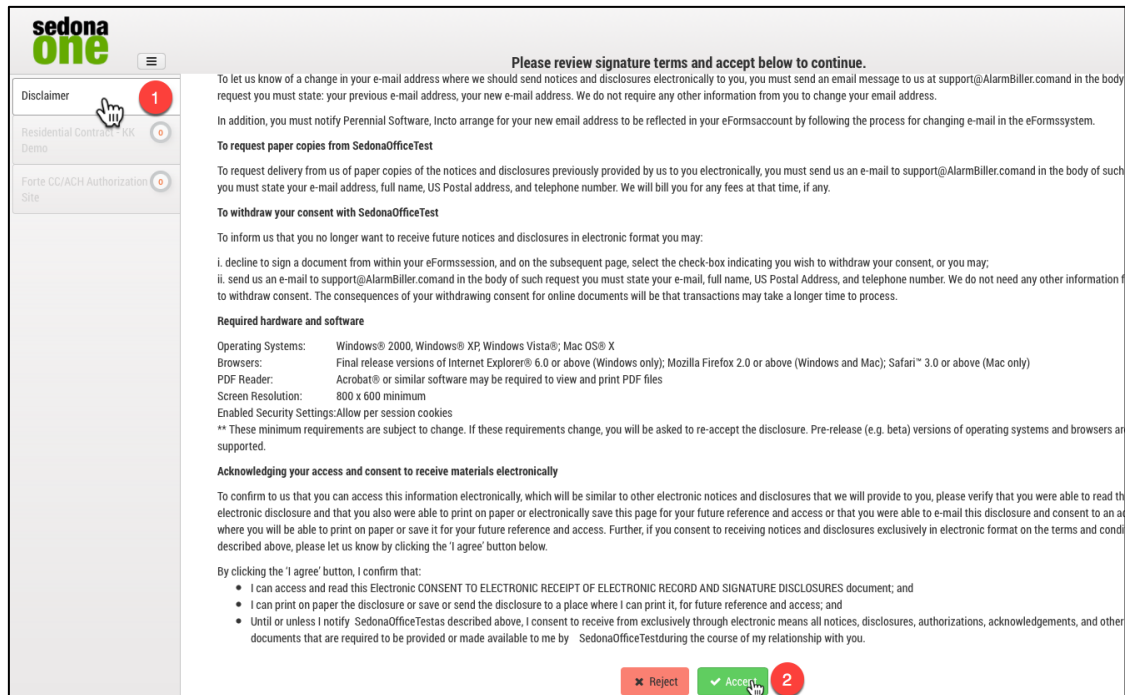
1. Recipient will receive emailed eForm.



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



sedona one

Disclaimer 1

Residential Contract - KK Demo 0

Forte CC/ACH Authorization Site 0

Please review signature terms and accept below to continue.

To let us know of a change in your e-mail address where we should send notices and disclosures electronically to you, you must send an email message to us at support@AlarmBiller.com and in the body of the request you must state: your previous e-mail address, your new e-mail address. We do not require any other information from you to change your email address.

In addition, you must notify Perennial Software, Inc to arrange for your new email address to be reflected in your eForms account by following the process for changing e-mail in the eFormssystem.

To request paper copies from SedonaOfficeTest

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an e-mail to support@AlarmBiller.com and in the body of such request you must state your e-mail address, full name, US Postal address, and telephone number. We will bill you for any fees at that time, if any.

To withdraw your consent with SedonaOfficeTest

To inform us that you no longer want to receive future notices and disclosures in electronic format you may:

- decline to sign a document from within your eFormssession, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- send us an e-mail to support@AlarmBiller.com and in the body of such request you must state your e-mail, full name, US Postal Address, and telephone number. We do not need any other information from you to withdraw consent. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process.

Required hardware and software

Operating Systems: Windows® 2000, Windows® XP, Windows Vista®, Mac OS® X

Browsers: Final release versions of Internet Explorer® 6.0 or above (Windows only); Mozilla Firefox 2.0 or above (Windows and Mac); Safari™ 3.0 or above (Mac only)

PDF Reader: Acrobat® or similar software may be required to view and print PDF files

Screen Resolution: 800 x 600 minimum

Enabled Security Settings: Allow per session cookies

** These minimum requirements are subject to change. If these requirements change, you will be asked to re-accept the disclosure. Pre-release (e.g. beta) versions of operating systems and browsers are not supported.

Acknowledging your access and consent to receive materials electronically

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please verify that you were able to read the electronic disclosure and that you also were able to print on paper or electronically save this page for your future reference and access or that you were able to e-mail this disclosure and consent to an address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format on the terms and conditions described above, please let us know by clicking the 'I agree' button below.

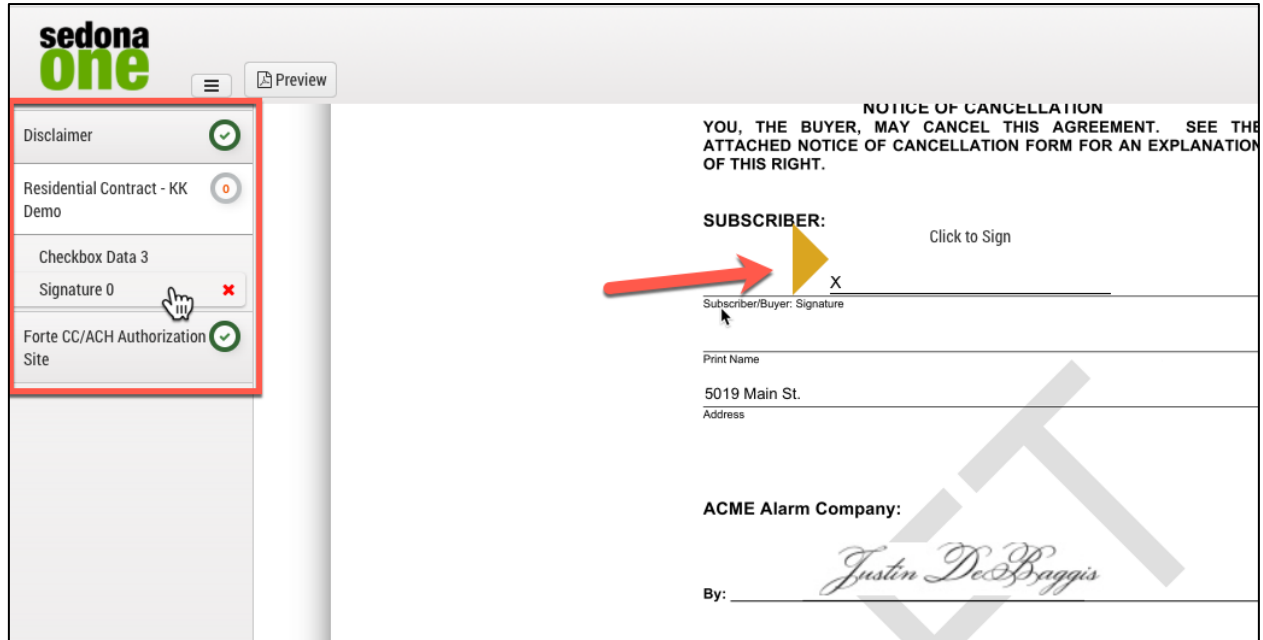
By clicking the 'I agree' button, I confirm that:

- I can access and read this Electronic CONSENT TO ELECTRONIC RECEIPT OF ELECTRONIC RECORD AND SIGNATURE DISCLOSURES document; and
- I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access; and
- Until or unless I notify SedonaOfficeTest as described above, I consent to receive from exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to me by SedonaOfficeTest during the course of my relationship with you.

2

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.



sedona one

Preview

Disclaimer 0

Residential Contract - KK Demo 0

Checkbox Data 3 0

Signature 0 1

Forte CC/ACH Authorization Site 0

NOTICE OF CANCELLATION

YOU, THE BUYER, MAY CANCEL THIS AGREEMENT. SEE THE ATTACHED NOTICE OF CANCELLATION FORM FOR AN EXPLANATION OF THIS RIGHT.

SUBSCRIBER:

Click to Sign

Subscriber/Buyer: Signature

Print Name

5019 Main St.

Address

ACME Alarm Company:

By: *Justin DeBaggis*

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



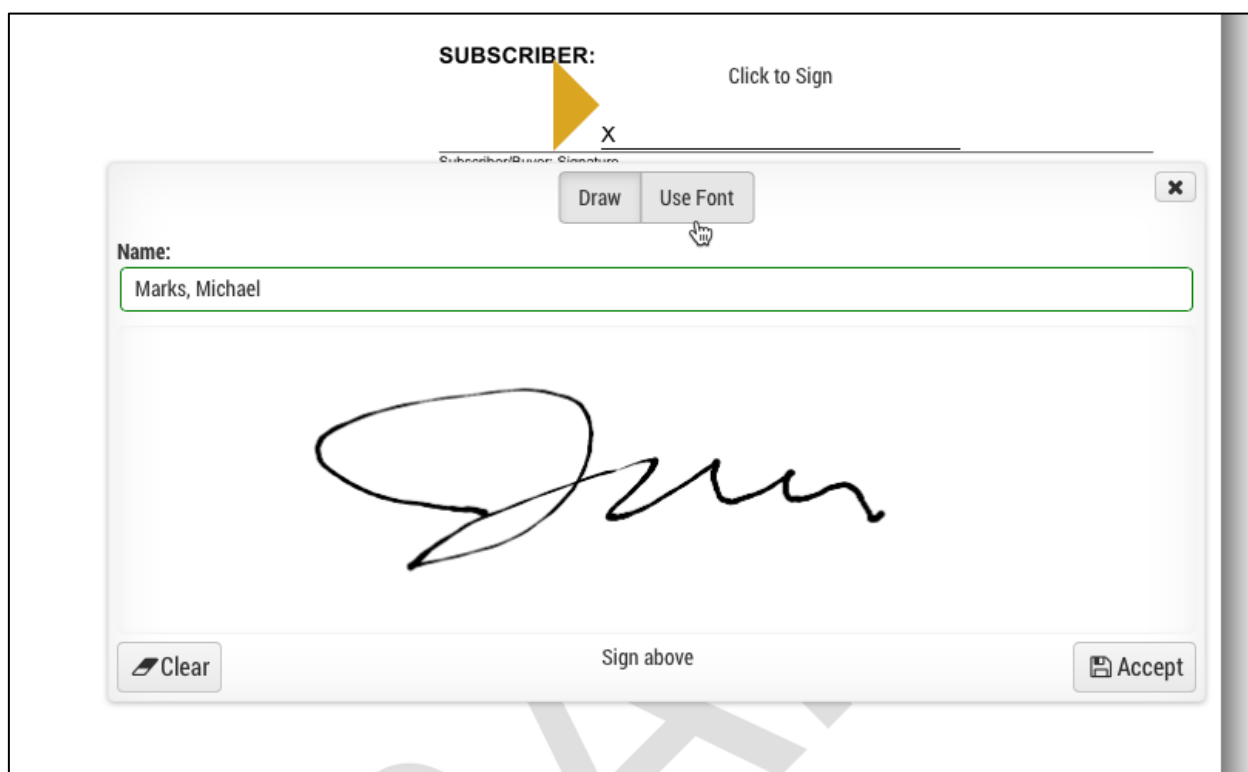
SUBSCRIBER:

Click to Sign

X

Subscriber/Buyer: Signature

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



SUBSCRIBER:

Click to Sign

X

Subscriber/Buyer: Signature

Draw Use Font

Name:

Marks, Michael

Clear Sign above Accept

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

sedona one

Preview

Disclaimer

Residential Contract - KK Demo

Checkbox Data 3

Signature 0

Forte CC/ACH Authorization Site

NOTICE OF CANCELLATION
YOU, THE BUYER, MAY CANCEL THIS AGREEMENT. SEE THE ATTACHED NOTICE OF CANCELLATION FORM FOR AN EXPLANATION OF THIS RIGHT.

SUBSCRIBER:

Click to Sign

Subscriber/Buyer: Signature

Print Name

5019 Main St.

Address

ACME Alarm Company:

By: Justin DeBuggis

Save Progress Reject Accept

Save Progress Reject Accept

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

Success

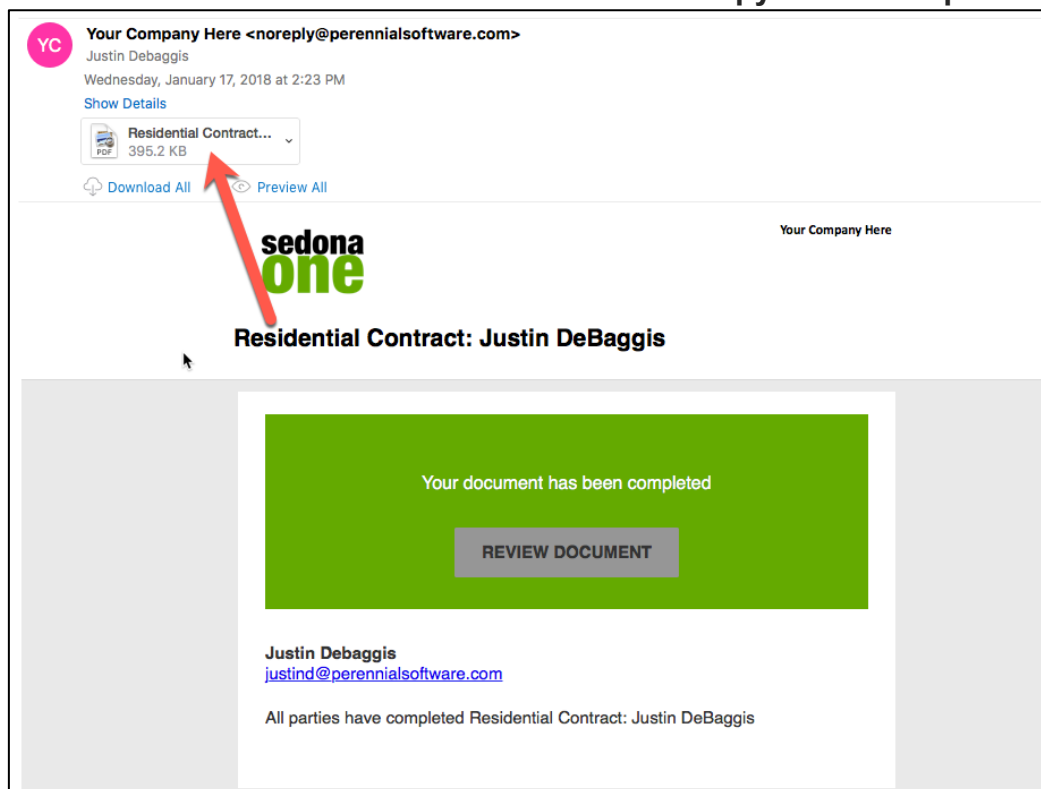
The completed document will be emailed to you as a PDF.

\$_____ per month,

forms this agreement for CPU software or change

shall automatically renew
ges by an amount not to

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.

sedona one

Home
Templates
Setup
Justin
eForms
Support Center
Tasks 7
Logout

eForms

Active Forms

+ Add Single Use Form Send Template(s) ☐ Show Just My Forms ☐ Show Inactive ☐ Show Expired

Drag a column header and drop it here to group by that column

Id	Name	Description	Sent	Created By	Expires On	Modified
149	test	test	No	Debaggis, Justin	2/10/2018 9:54 AM	1/11/2018 9:54 AM

1 - 1 of 1 items

Complete Forms

☐ Show Just My Forms ☐ Show Archived

Drag a column header and drop it here to group by that column



Id	Name	Description	Created By	Completed On
150	Residential Contract: Justin DeBaggis	Residential Contract: Justin DeBaggis	Debaggis, Justin	1/17/2018 2:29 PM
148	Resi Contract - Justin DeBaggis	Resi Contract - Justin DeBaggis	Debaggis, Justin	1/11/2018 9:45 AM
147	Michael Marks	Michael Marks	Debaggis, Justin	12/21/2017 9:18 AM
146	test	test	Debaggis, Justin	12/15/2017 10:00 AM
144	proposal		Debaggis, Justin	12/5/2017 1:21 PM


Active Forms

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

Active Forms Components

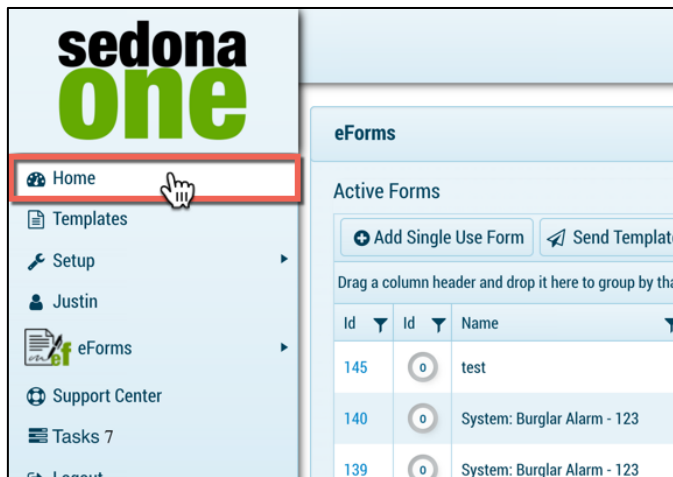
- **+Add Single Use Form:** This is used to send a one-off form that won't be saved as a template. For example: Sending a proposal for John Smith and you would like to send it out electronically.
- **Send Template:** One location to send templates from your template library.
- **Show Just My Forms:** 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.

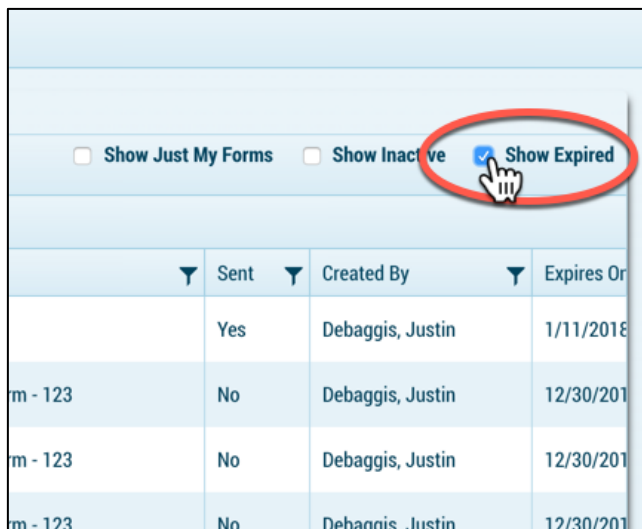
- **Delete:**  This will send the form to the inactive queue. To permanently delete check the inactive queue and delete.

Change Expiration Date on Expired Form

1. Navigate to **Home** .



2. Select **Show Expired**.



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

Id		Name	Description
145	<input type="radio"/>	test	test
140	<input type="radio"/>	System: Burglar Alarm - 123	System: Bu
139	<input type="radio"/>	System: Burglar Alarm - 123	System: Bu
138	<input type="radio"/>	System: Burglar Alarm - 123	System: Bu
133	<input type="radio"/>	Contract	Contract

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

Complete

Details

Name: System: Burglar Alarm - 123

Description: System: Burglar Alarm - 123

Expires On: 12/30/2017

Forms

Form Name: test cont

Description: test cont

Assigned

Email

Subject: System: Burglar Alarm - 123

December 2017

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Sunday, January 21, 2018

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

☐ Push Document

Preview Delete Send

Cancel Changes Save Changes

Details

Name: System: Burglar Alarm - 123

Description: System: Burglar Alarm - 123




Expires On: 1/31/2018

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.

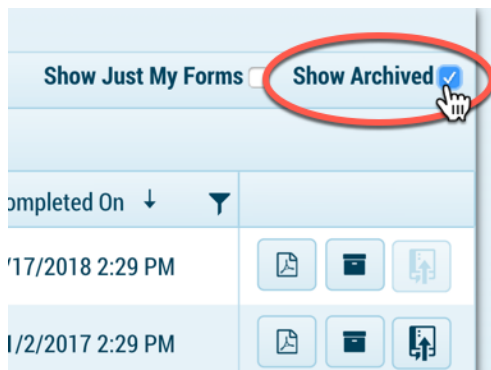
Complete Forms

Show Just My Forms ☐ Show Archived ☐

Drag a column header and drop it here to group by that column

	Description	Created By	Completed On	
Contract: Justin DeBaggis	Residential Contract: Justin DeBaggis	Debaggis, Justin	1/19/2018 12:16 PM	  
Justin DeBaggis	Resi Contract - Justin DeBaggis	Debaggis, Justin	1/11/2018 9:45 AM	  
	Michael Marks	Debaggis, Justin	12/21/2017 9:18 AM	  
	test	Debaggis, Justin	12/15/2017 10:00 AM	  

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**.

Complete Forms

Drag a column header and drop it here to group by that column

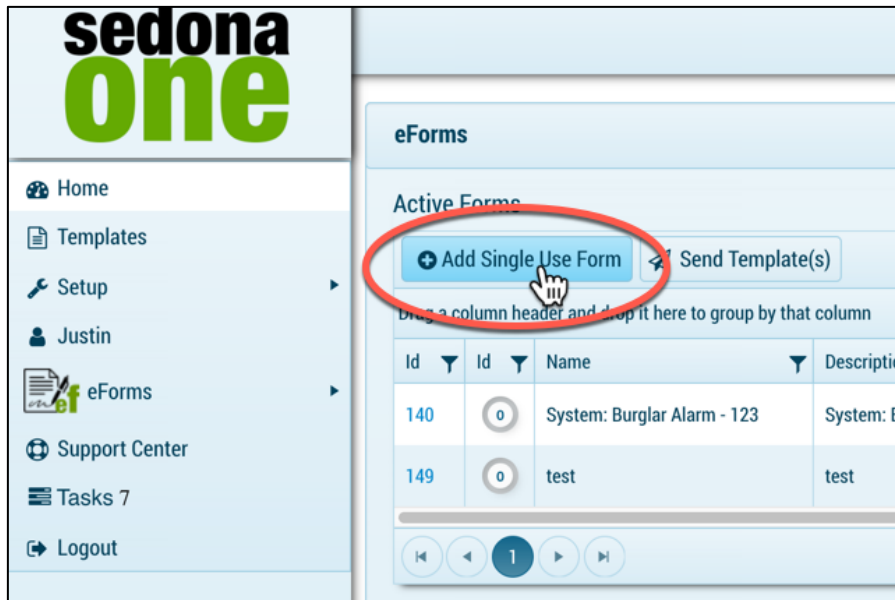
Id		Name	Description
151	✓	Residential Contract: Justin DeBaggis	Residential Cont
148	✓	Resi Contract - Justin DeBaggis	Resi Contract - J
147	✓	Michael Marks	Michael Marks
146	✓	test	test
144	✓	proposal	

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

The screenshot shows the 'Complete' tab selected on the left. The main area displays details for a form named 'Residential Contract: Justin DeBaggis'. At the top right, there are two buttons: 'Certificate' (with a gear icon) and 'Download' (with a document icon). Both buttons are circled in red. Below the details, there is a 'Forms' section with a table listing two forms, both labeled 'Residential Contract - KK Demo'. The first form is marked 'Assigned' in green. A 'Download' button is visible next to the second form.

Add Single Use Form

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



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

Name:
Proposal: Justin DeBaggis

Description:
Proposal: Justin DeBaggis

Integration:
None

Upload PDF:
Select files...

Save

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**.

eForms

Name:
Proposal: Justin DeBaggis

Description:
Proposal: Justin DeBaggis

Integration:
None

Upload PDF:

Select files... ✓ Done

Completed Sales Proposal.pdf
1.18 MB

Save

8. Follow steps outlined in [Design Mode](#) and [Delivery Mode](#).