SedonaOffice eForms

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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 help 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 to creating a template and delivering an eForm.

Launching eForms

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

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

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

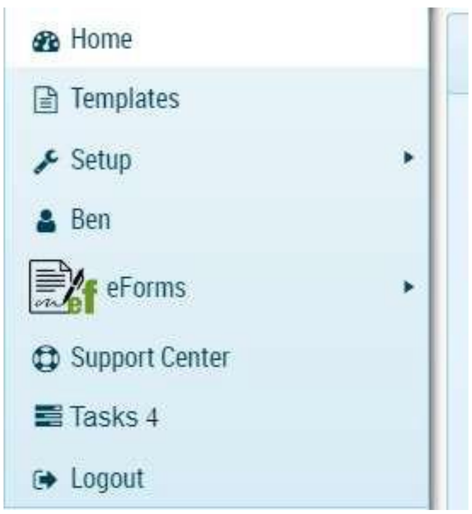
3. When logging in for the first time you will need to reset your password. After the password is reset, re-enter your username and new password. Watch this video on logging into SedonaOffice **Login Process**.

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 Following Figure provides an overview of the different sections in eForms. The different sections are described on the next page.

Navigation Tabs



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

- Home: This tab provides access to Active and Completed 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.
- Name: This tab provides access to your user account information such as site themes, email, etc.
- Support Center: This tab provides access to submitting a support ticket to SedonaOffice's 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 the setup are listed below.

Users

The Users tab lists 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.

How to Add a User

Select + Add User and fill in the following fields:

- Username: Unique username for the specific user that will be used to log in to the application.
- First Name: First Name of User
- Last Name: Last Name of User
- Phone: User's Phone Number
- Email: Email Address of User. This will be the email address completed forms will be sent to when this user sends a form, and the form is completed.
- User Role: Select the drop down for pre-set user roles. The user role will have permissions checked off and 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 SedonaOffice modules.
- Password: Password the user will use to login to the SedonaOffice 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 SedonaOffice modules 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. This is how you delete users.

User Security Permissions

- Delete Form: If checked the user will have the ability to Delete Templates and Active Forms
- Design Form: If checked the user will have the ability to modify a template.
- eForms Manager: If checked the user will be able to be set up as a manager with users 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.

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 log in.

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. 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

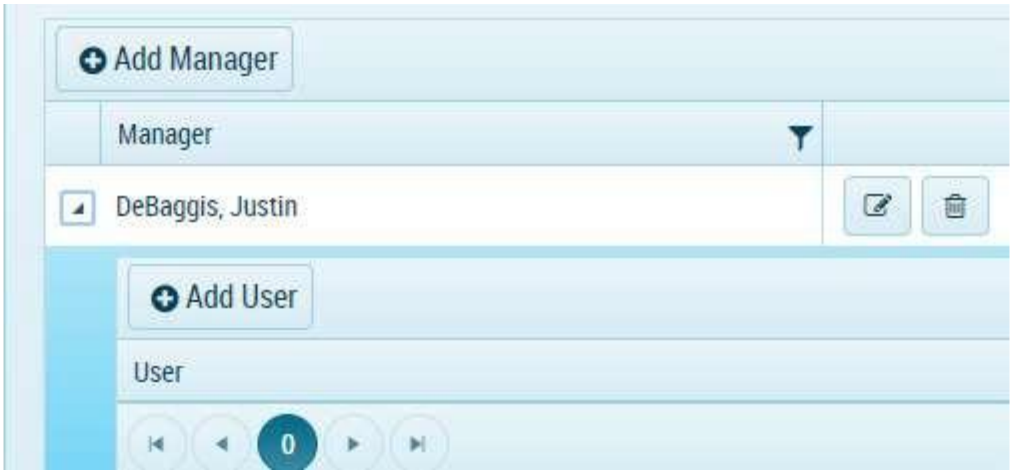
1. Select +Add Manager

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

3. Select the "Check icon"

Assign a User to a Manager

- Select the drop down section next to the manager you would like to assign users.



- Select +Add User
- Select the appropriate user
- Select the “picture icon”
- 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 assigning 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

Select +Add New Category

- Name: Name of the Category that will appear in the drop down when adding a template.

Select Update to add the new category

Preferences

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) below. 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 reminders are checked this will be the number of days for reminders to be delivered.

Company Preferences

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

Services

The Services tab is to be used by the SedonaOffice 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 the eForms WYSIWIG editor. When building a template, you add electronic fields to create a fillable document and capture electronic signatures. You may create an unlimited number of templates.

Templates Tab

List of all available templates in your Library

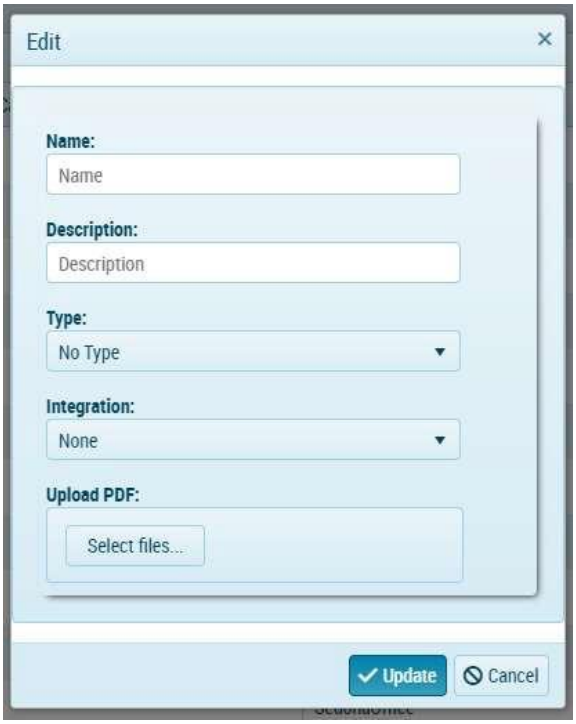
Templates Tab Fields

- **+ Add Template:** Select this button to add a new template
- **Send Template:** Select to send a template electronically
- **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 template is integrated with SedonaOffice fields, integration will read SedonaOffice. If no integration is active the field will read none. The integration allows templates to pull SedonaOffice fields based on the data type. (Integration is only available for customers who have purchased the SedonaAPI)
- **Data Type**: Fields in SedonaOffice (customer, site, system) that the template may integrate with. If integrated at the customer level, you will be able to pull customer level information into the form. If integrated at the site level, you will be able to pull site customer and site level information into the form. If integrated at the system level, you will be able to pull customer, site, and system information to the form.
- PDF Backdrop?
- Yes: PDF was uploaded, and fields were added on top of the PDF
- No: No PDF was uploaded, and template was designed using the WYSIWIG editor
- **Edit Button:** Select edit to change the name, description, or category for a template.
- **Copy Button:** Copy the template and make any adjustments to the copied template. We recommend selecting edit on the copied template and changing the name.
- **Design Button:** Go into design mode for the selected template to make adjustments or add new fields.
- **Delete Button:** Deleting a template sets it as inactive.
- **Show Inactive Checkbox:** Show inactive shows a list of all inactive forms, or forms that were deleted.

Creating New Templates

Select +Add Template

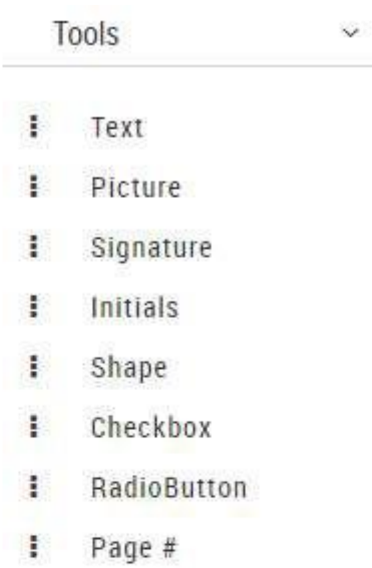
- **Name:** Name of your template (Ex: Residential All-in- One Contract)
- **Description:** Description of your template may be the same as the name or more detailed description of the form.
  If you have multiple contracts for example, be descriptive with the naming so when sending the templates, you select the correct one
- **Type:** The type drop down lists your "form categories" created in setup.
- **Integration:** If you have purchased the SedonaAPI and would like to integrate with SedonaOffice select SedonaOffice (see SedonaOffice Integration for more details)
- **Data Type:** (Appears only if Integration = SedonaOffice) Based on the level selected you will have access to SedonaOffice fields that can be assigned to a template and auto populate the form when sending.
- **Customer:** Provides SedonaOffice fields from the customer level
- **Site:** Provides SedonaOffice fields from the customer and site level
- **System:** Provides SedonaOffice fields from the customer, site, and system level
- **Upload PDF:** Select a PDF file from your computer or drag a PDF over Select Files. Once the file turns green and reads 100% you may select update to access design mode.
- **No PDF Uploaded:** If no PDF is uploaded you will have the ability to use WYSIWYG editor to customize a template using a blank canvas.



Select Update to go into Design mode. Whether you upload 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

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 for different options to customize the fields you dragged in.

Text Box

Text Box is used for adding static text that will be fixed on the form. To add a text box:

- Click and Drag *Text* from the tools section into the template
- Select edit in the right
- Type in the text and format as needed (Bold, Underline, pick font, size, etc.)

Picture

Picture allows you to add a new picture onto a form or access a library of previously used pictures. To 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
- Select Use
- If you have previously uploaded a picture, select *Previously Used.*
- Highlight the picture
- Select Use Selected

Signature

Signature is a required field for a recipient to sign electronically. Place this field where a recipient must sign the document. When added it adds the field to Form Data.

- Click and Drag *Initials* from the tools section onto the form.
- Navigate to Form data and select the drop-down arrow
- 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 who signed
- IP Address: IP address of the device used to sign

Initials

Initials are a required field for a recipient to enter initials. It captures an I.P. address and geolocation (if the user has it enabled). When added it adds the field to Form Data.

- Click and Drag *Initials* from the tools section onto the form.
- Navigate to Form data and select the drop-down arrow
- 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 who signed
- IP Address: IP address of the device used to initial

Shape

Shape is a straight line that can be used to break apart text, underline text fields and any other customizations to your template.

- Click and Drag *Shape* from the tools section onto the form.
- Size and position 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 into 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.

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.

Page

Page # allows you to list the page number for each page if you have multiple pages. This will primarily be used with the WYSIWIG Editor.

Form Data

Form Data are electronic fields that are form specific to 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, who can edit and if it is required.

Adding a Form Data Field

1. Select + Add Field
2. Fill in the fields below:
   - **Field Name**: Unique field name for the field, this should have no space. The field name for each data type should be unique.

- Example: You may need three text fields for name, address, and passcode. You would add three form data text fields and they would all have separate form names. Usually, you would have them separated such as: Name1, Name2, Name3, etc.
- **Display Text**: This will be the text that displays each field on the form and for the customer to see. This can contain spaces and can be the same as other fields.
- **Data Type:** Specific type of field you would like to create, see all of the data type options in the next section of this document.

3. Select Add
4. Drag field onto template
5. Select if the form is editable and who can edit it on the right. See All Edit of Fields for specifics.

Data Types

- **Text:** Use this field to give the sender or recipient an electronic text field(s) to enter in text.
- **Number**: Use this field to give the sender or recipient 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. See 'Using Check Boxes and Radio Buttons' in the tools area for more information.
- **Radio Button:** A radio button essentially acts as a grouping of checkboxes in which only one option can be selected. These can be made into a required field and can be grouped with multiple options.

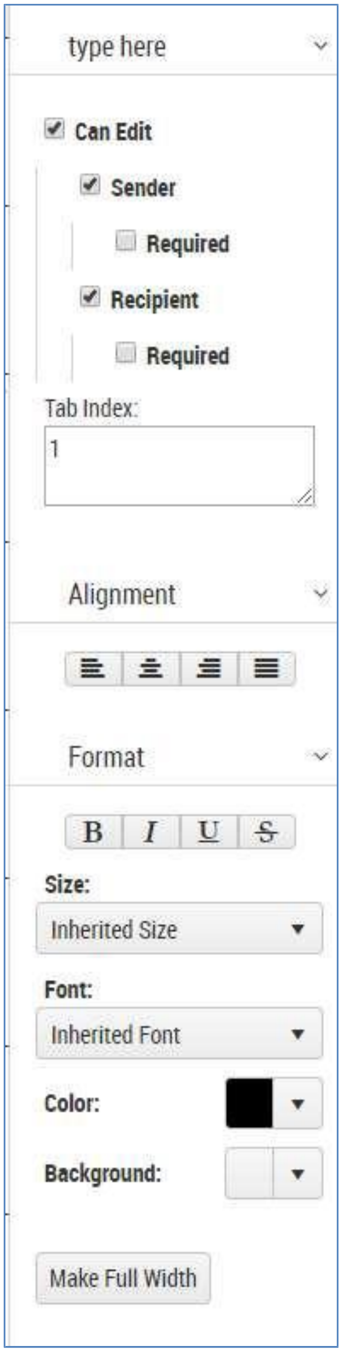
  Adding and Grouping Radio Buttons: To add a radio button, click on the 'add field' button, then type a field name and display name, and then select the data type of 'radio button' from the dropdown. You will then click on the 'add option' button for each option the customer has to pick from. You will be asked to enter a value and a display name for each option. The value will just be a sequential number pattern (i.e. 1 for the first options value, 2 for the second options value, etc.). The display name will be the name of the option.
- **Drop Down:** Use this field to give your recipients or sender a list of options they can select.

  Adding and Grouping Drop Down: To add a Dropdown, click on the 'add field' button, then type a field name and display name, and then select the data type of 'dropdown' from the dropdown. You will then click on the 'add option' button for each option the customer has to pick from. You will be asked to enter a value and a display name for each option.
  The value will just be a sequential number pattern (i.e. 1 for the first options value, 2 for the second options value, etc.). The display name will be the name of the option.

- **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.

All 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 the field
2. Navigate to the right side of the screen to view the options you have with editing this field
3. After selecting the 'Can Edit' checkbox, these rules will follow:

- Can Edit – The field can be edited
- Sender – The sender can edit the field but is not required
- Sender 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
- Recipient Required - The recipient can edit the field and is required or can't complete the form.

Tab Index
This field controls the order of the fields the recipient will be required to fill out. If a 1 is placed here, the recipient will first be prompted to fill this field out. If a 2 is placed, this will be the second field the recipient will be prompted to fill out.

Alignment

Select the alignment of the data entered into the selected field.

Format

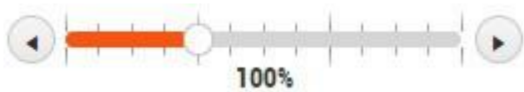
Format the selected field by selecting a font, size, font color, and background color.

Make Full Width

The selected field will scale across the template horizontally when this button is clicked.

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. To Zoom in and out follow the



instructions below:

Press the ‘>’ button to zoom in and the ‘<’ 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 your 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 a valuable tool when making a form with the WYSIWIG editor, as you can check in on the progression of what your template looks like.

1. Select Preview
2. If the integration is activated at a specific level, select an entity
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 20 to 30 minutes to ensure you don’t lose any progress you made.

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.

Design Mode – PDF Overlay

After uploading a PDF, the PDF will appear as a backdrop in design module. You will then create fillable fields and drag them onto the PDF.

Packages Tab

Packages are just a way to group multiple templates form your template library together. When sending a package 1 email will contain all the templates associated with the package. For example, contract, recurring authorization form and customer contact sheet.

SedonaOffice Integration

Adding Template with Integration

- Select + Add Templates
- Enter in the name, description and type.
- Select Integration: SedonaOffice
- Data Type: Is this linked at the customer, site or system level.
- **Customer:** Provides SedonaOffice fields from the customer level. Documents pushed back to the customer level.
- **Site:** Provides SedonaOffice fields from the customer and site level. Documents pushed back to site level.
- **System:** Provides SedonaOffice fields from the customer, site, and system level. Documents pushed back to system level

Shared Data

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. Click the drop down on customer, site, or system
2. Click and drag the selected field onto the form

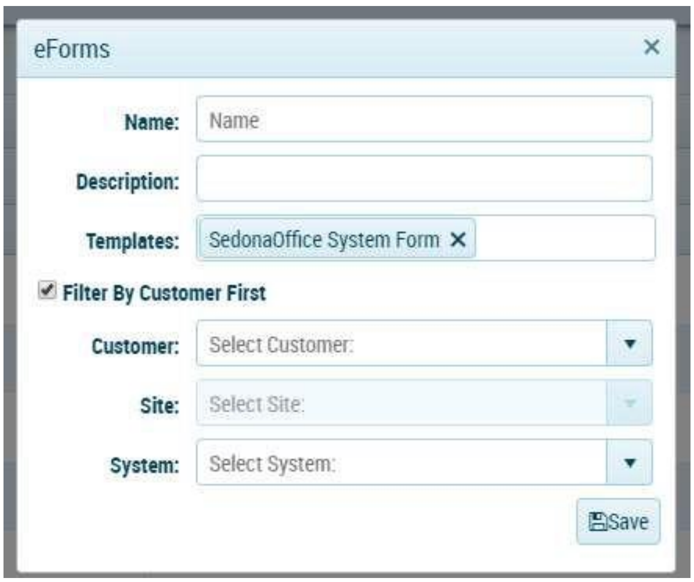
Shared Data in a Text Box

1. Drag a text box onto the form
2. Select edit in the top right
3. Select '+ Add Data' button
4. Select drop down next to shared data
5. Click on the filed you would like to add
6. Repeat process until you have added all the field
7. From here you can format the fields

Sending Integrated Templates

When sending a template that is integrated with SedonaOffice you will have to pick a customer, site, or system (depending on your data type) before you are able to deliver the form. If you have a form with data type of customer, you will just need to select a customer before sending. If you have a form with a data type of system, you will need to select a customer, site, and system before you can send the form.

> Tip: If you have a contract for new clients and the customer will not be in the database yet, make sure you DO NOT integrate when setting up the contract so that you won't have to select the customer before sending the form. In this example leave the integration set as none.



Select Send Template Select the customer, site and system (dependent on the level of integration for the template) Select Save

SedonaDocs Integration

*(*SedonaDocs is Required*)*

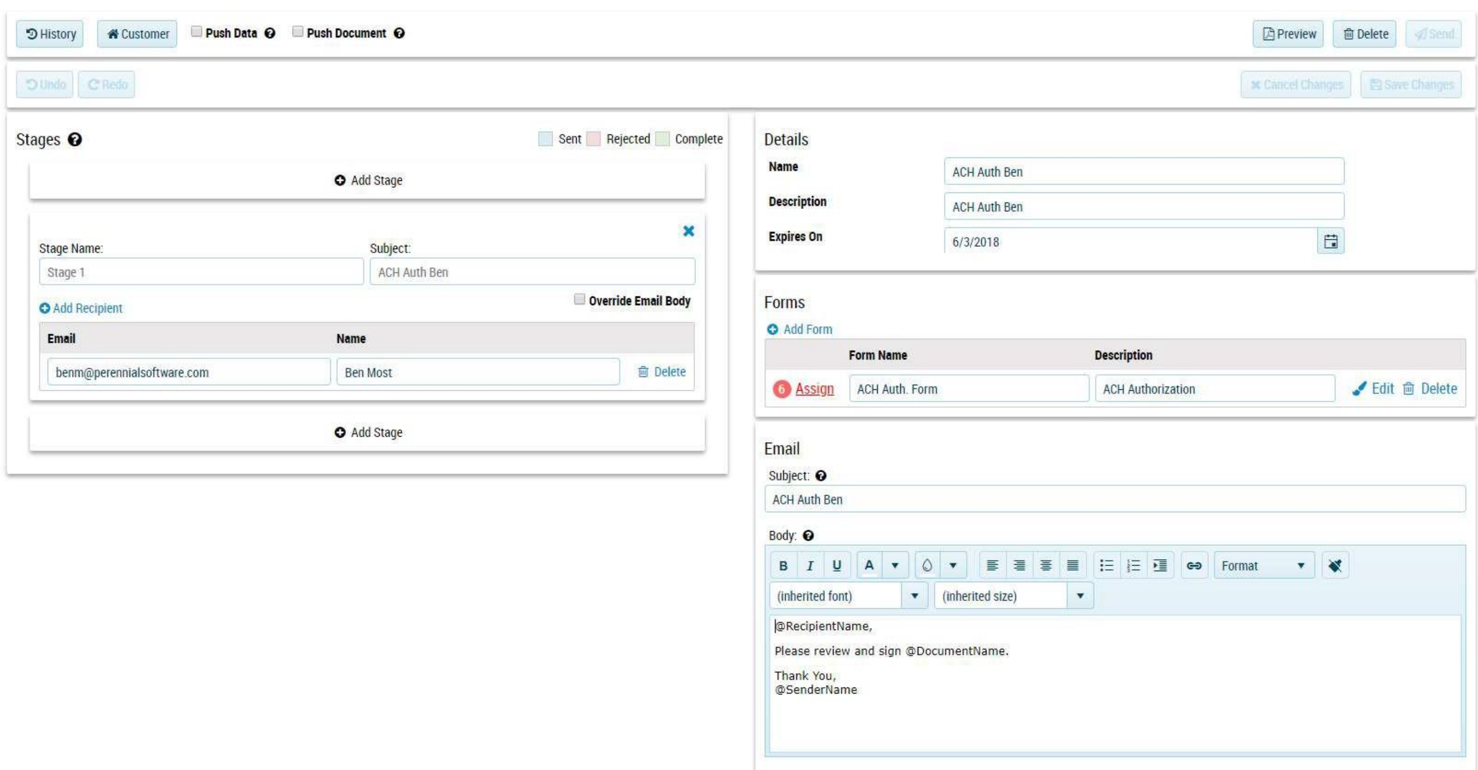
When a form is completed and the template is integrated with SedonaOffice at the customer, site, or system level, the completed PDF will automatically save in documents based on the customer that the document was attached to. The application can be set up to automatically push completed forms to SedonaDocs at the customer, site, or system level. To do this you will want to go to setup, then to preferences, and then check the 'Push Document' checkbox to have your completed forms automatically push to Sedona. Otherwise, you can manually push each document after it is completed by going to the home page and hitting the 'Push Document' button to the right of the completed forms. You can also open up those forms and hit the 'Push Document' button to accomplish this

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:

- Navigate to Home Screen or Templates Tab
- Select Send Template
- Enter in a name/description
- Pick a form
- Select Save

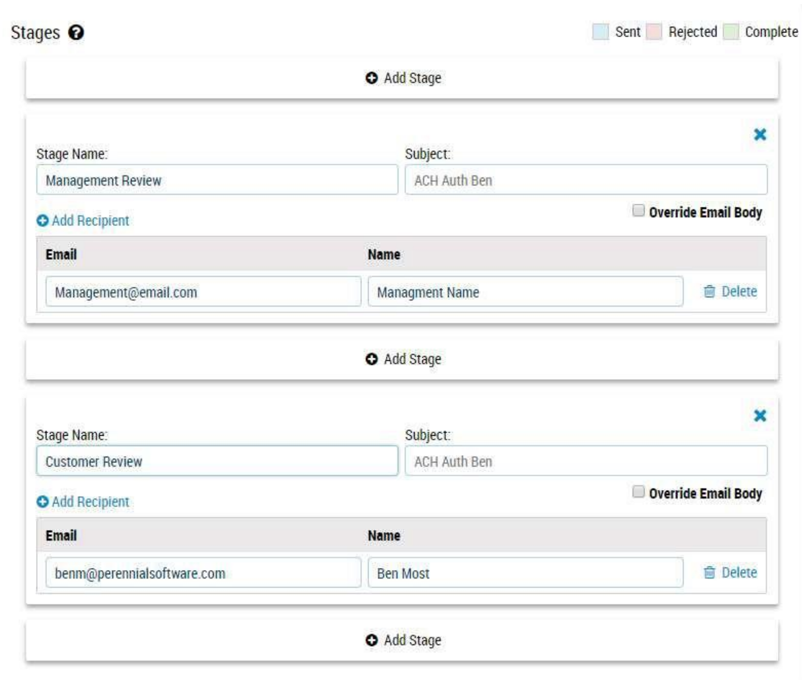
Sending Bay



The functions of this screen will be explained in the following pages

Stages

Stages provide an option for users to control the sending process. This is best explained by example: If you have a form that you would like management to take a look at before it gets sent to the customer, you would add a stage that would be sent to management before it gets sent to the recipient. It would look like this:



This was accomplished by hitting the 'Add Stage' button above the initial stage that appears, then entering a stage name, email, and name. What will happen in this instance is upon hitting send, an email will first go to 'Management@email.com'. They will then review the document and hit the accept button, then activating the next stage and sending the form to the customer.

- Stage Name – Description of what the stage is for
- Subject – Usually will just be left as the title of document. This will be the subject of the email that gets sent
- Override Email Body – If checked, you can control what the body of each email that gets sent includes
- Recipients – You can add as many recipients as you would like to a stage. These are the people that will be receiving an email. You will also be assigning these recipients to fill out specific portions of the form(s)

Expires on – The date that is placed in this field determines when the document expires, which means the form is no longer available for signing.

Forms

- +Add Form – This button allows you to add more templates to what you are sending
- Edit – This button allows you to edit the form in just this one instance. There are rare instances in which you may need to change the form slightly for a customer and, rather than creating a completely new form to accommodate this, you can edit the document in the sending bay before sending it
- Delete – This delete button will get rid of one of the forms being sent to the customer

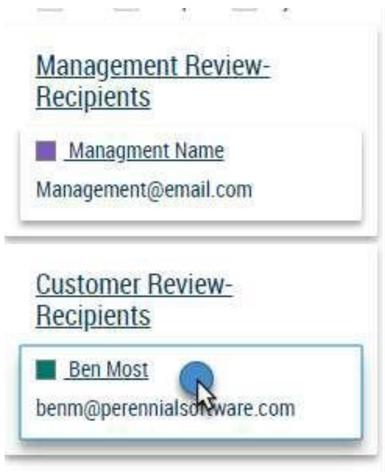
Assigning

This area is where the sender will be filling out their portion of the form and assigning the recipient to theirs. The assign button will show up as red initially (if there are fields that are required to be filled out). This indicates that you need to complete the assigning process before you can send the form. The send button will be greyed out until you complete this portion of the form.

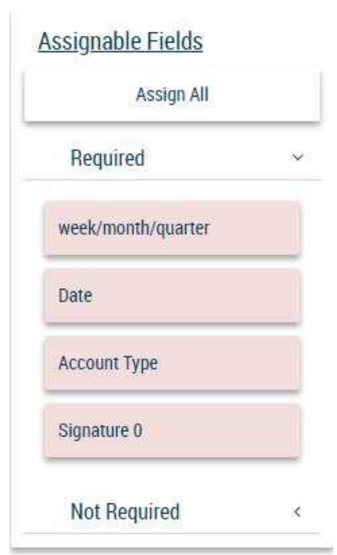
After you press assign, there are a couple of things you will need to complete:

Assigning Fields to Recipients

1. Click on the recipient on the left side of the screen



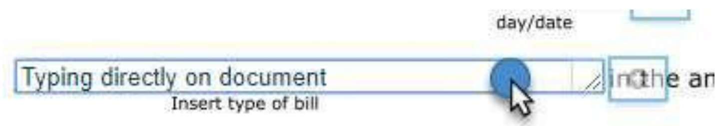
2. You can then either click on the '+' next to a field on the form itself to assign the recipient to it, or you can click on the field on the right-hand side of the screen.

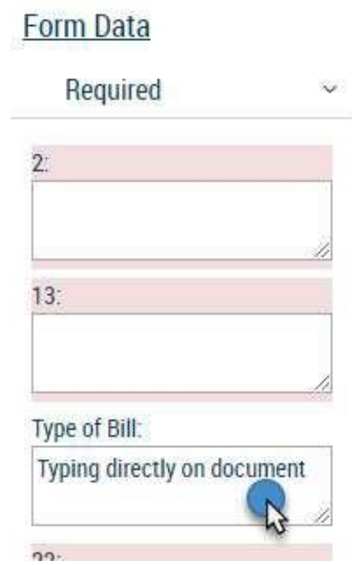


Tip: The 'Assign All' button provides an option to quickly assign all fields to a recipient. This will typically be used for forms with only one recipient. If there are more than one, you may have individual fields assigned to multiple recipients.

Filling Out Fields as the Sender

As the sender, you can either fill out fields directly on the form, or from the Form Data area in the lower right of the screen.





Tip: It is usually easier for the sender to fill out fields on the document itself rather than filling them out from the form data area

Preview
The preview button will allow you to take a look at what the document will look like for the customer before you send it to them

Delete
Press this button if you are no longer planning on sending the document and/or wish not to send it

Push Document
You will want to have this checkbox checked if you want the document to be pushed to the SedonaDocs area. This checkbox should be automatically checked for every form you send if you have the 'Push Document' checkbox selected in the setup under preferences

History
This button allows you to see all the history with this form from the time it was created to be sent, to the time it is completed with all edits in between

Send
Press this button when you have looked at everything and decide that the form is ready to be sent

Post Sending Options

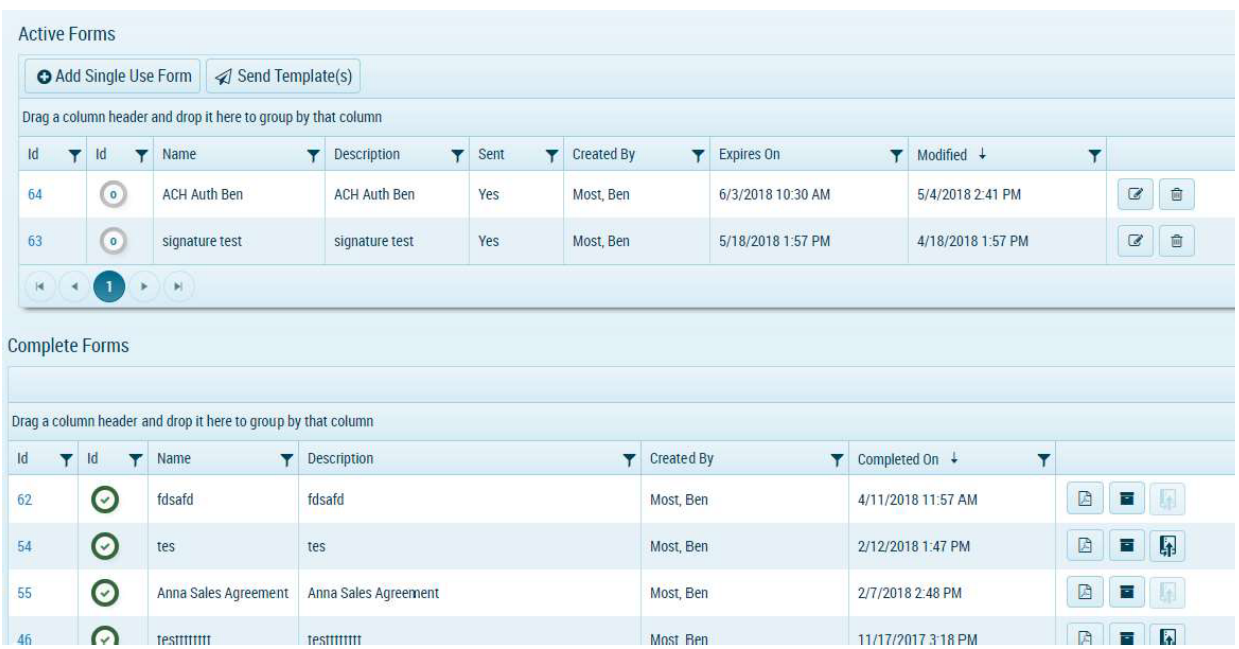
After you send the form, you will notice that a couple of options populate next to the recipient

Sign
After clicking on this, you can then allow the customer to sign what they would need to if they are with you. This is a quicker option for signing if the customer is with you than sending them the email, waiting for them to open up the email and sign

Resend
This option is here in case you need to resend the document to the customer for signing

Delete
This button will delete the recipient from the stage

Home



Active Forms
This area will show you all the forms that you have sent out but have not yet been signed. Click on the pencil button to make any changes you need to with the sent document. Click the trashcan button to get rid of that document

Complete Forms
This area shows you all the forms that have been received and signed by customers. The first paper button can be pressed to see a PDF of the completed document. The black box button can be used to archive the form. You can always see all your archived forms by clicking on the 'show archived' checkbox. Lastly is the 'Push Document' button. If you do not have the 'Push Document' checkbox in setup under preferences checked, then you can push a document manually to Sedona Docs with this button