AlarmBiller & SedonaOffice – eForms Guide

This document details how to setup and configure eForms within AlarmBiller. Proper configuration of these items ensures your contracts and communications are professional and automated.

Preparation

Prior to setting the configuration items, it is important to plan ahead. You should start by reviewing with your team and establishing the documentation standards for your organization.

eForms Overview

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

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 first launching eForms, you receive your credentials from your AlarmBiller/SedonaOffice support team. The team provides you with 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 your Support team. An example of the URL is https://yourcompanyhere.alarmbiller.com. If you need access for your company, please submit a service request at support.boldgroup.com.

2. The eForms Login page will look as below. Type in your username, password and click on Login. The initial username and password are generated by the Support team. If you have not received your credentials, please submit a service request at support.boldgroup.com.

3. When logging in for the first time, you are prompted to reset your password. After the password is reset, re-enter your user name and password.

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 at your signed and active forms.

The below listing provides an overview of the different sections in eForms. The different sections are described in detail on the following pages.

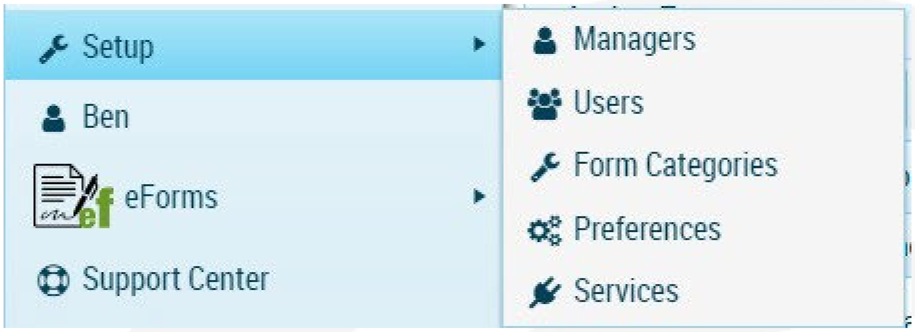
Navigation Tabs

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

- **Home:** This tab provides access to Active and Complete forms, the ability to send template 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.
- **eForms:** Links you back to AlarmBiller and other products.
- **User Name:** This tab provides access to your user account information such as site theme, email, etc.
- **Support Center:** This tab provides access to submitting a support ticket for assistance. 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.



Users

The Users tab lists all of the 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:

Select + Add User and fill in the following fields:

- **Username:** Unique username for the specific user that will be used to log into the application.
- **First Name:** First Name of User.
- **Last name:** Last Name of User.
- **Phone:** User's Phone Number.
- **Email:** Email address of User.
- **User Role:** Select from the drop down for pre-set User Roles. The User Role contains default permissions checked off and the permissions may be overwritten.
- **Products:** Check which products the User will be able to access. You may select more than one product if the user utilizes multiple modules.
- **Password:** Password that the user uses to log into the 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 modules, the application selected is 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. Be sure to set an inactive date.
- **Notes:** Pertinent information about the User.

User eForms Permissions

These establish what permissions the User may access.

- **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 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. The URL, Username and Password that have been set for the User to log in can now be provided to that User.

Managers

A Manager role must be checked off in the User under Permissions. A Manager in eForms allows the User to oversee open and completed forms in the Home Screen from other users. 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:

- Select Add Manager.
- Select the manager from the drop down list.
- Click the check icon to commit the Manager.

Assigning Users to a Manager:

- Click the arrow to expand the Manager details.
- Select Add User.
- Select the appropriate User.
- Click the check icon to commit the User to that Manager.
- Repeat for all Users to this Manager.

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:

- Select Add New Category.
- Enter a Name for the new Category.
- Click the check icon to commit the Category.

Preferences

Preferences set the standards for reminders and integrations for eForms.

eForms Settings:

- **Enable Reminders:** When selected reminder emails send to the customers based on the set number of days with no activity on a form.
- **Reminder after days** (found at the bottom of the page): Sets the number of days for the reminders to start. These repeat up until the expiration date when no action occurs on the form.
- **Push Data:** Links to the customer data found in your application. This allows push and pull of data.
- **Push Document:** Sends any completed documents to the customer's record.

Company Preferences:

This tab contains all the Company details used for sharing your Company information on Forms.

- **Address:** Company Address.
- **Phone:** Company Call back Telephone Number.
- **Logo:** Image of the Company logo for including on Forms.

Services

The Services Tab is used by SedonaOffice for API integration. This displays the endpoint for connection.

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 WYPSIWIG 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.

Template Tab Columns

The Templates Tab is a list of all available Templates in your library. The following details the data found there:

- **Add Template:** Adds a new Template.
- **Send Template:** Sends an existing Template.
- **Name:** Template name to identify the document. Please note, this field may not contain spaces.
- **Description:** A more detailed description of the document.
- **Category:** The form Category the Template should reside.
- **Integration:** The connection to the applicable automation system.
- **Data Type:** Fields with which the Template may integrate.
- **Yes/No:** If the PDF is loaded (Yes) or if the document was created in the WYSIWYG editor (No).
- **Edit Button:** Allows you to change the name and details of the Template.
- **Copy Button:** Allows you to make a copy of an existing Template.
- **Design Button:** Allow you to edit/update the content in the Template in the editor.
- **Delete Button:** Deletes the Template.
- **Show Inactive Checkbox:** Filters the list to include inactive Templates.

Creating New Templates

- Select Add New Template.
- Enter Name and Description. If you have multiple contracts for example, be descriptive with the naming so that when sending the templates, you select the correct one.
- Enter Type.
- Select Integration.
- Select the appropriate Data Type.
    - **Proposal:** Collects data found in a Proposal. Used with SalesAutomation.
    - **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.

Design Mode:

After creating your Template, you enter into Design Mode. If you are editing an existing Template, click the Design button to enter into Design Mode.

Tools

The Tools section contains all the static features you may add to your Form such as Text, Pictures, Shapes and page numbers. The Tools features that allow data entry without creating a separate data field are: Signature, Initials, Checkbox and Radio button.

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 your font, size, etc).

Picture

Picture allow 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 time stamp the signature was captured.
    - **IP Address:** IP address of the device used to sign.

Initials

Initials is a required field for a recipient to enter initials. It captures an IP 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 they will automatically populate on the form after the e-initial is captured:
  - **Time Stamp:** Date and time stamp 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 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 for the Template you are working with. The fields are listed below with specifics on how to add on a form. When adding a field, you will select if the field can be edited, whom can edit and if it is required.

Adding a Form Data Field:

1. Select Add Field.
2. Fill in the fields below:
   - **Field Name:** Unique field name for the field, this should have no spaces. 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 as such: Name1, Name2, Name3, etc.
   - **Display Text:** This will be the text that displays for each field on the form and for the customer to see. This can contain spaces and can be the same as the 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 whom can edit it on the right. See All Edit of Fields for specifics.

Data Types

- **Text**: Use this filed 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 Buttons**: A Radio Button essentially acts as a grouping of checkboxes in which only one option can be selected. These can be made 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 Drop Down, click on the 'add field' button, then type a field name and display name, and then select the data type of 'dropdown' from the Drop Down. 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.

- Drag in the field.
- Navigate to the right side of the screen to view the options you have with editing this field.
- 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:** When this button is clicked, the selected field will scale across the Template horizontally.
- **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 these instructions: 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 maie 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 Template 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 Mode. You will then create fillable fields and drag them onto the PDF.
- **Packages Tab:** Packages are just a way to group multiple Templates from 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.
- **Adding Shared Data on a Form:**
    1. Click on the dropdown on customer, site or system.
    2. Click and drag the selected field onto the form.
- **Shared Data in a Text Box:**
    - Drag a Text Box onto the form.
    - Select Edit in the top right.
    - Select '+Add Data' button.
    - Select dropdown next to Shared Data.
    - Click on the field you would like to add.
    - Repeat process until you have added all the fields.
    - From here you can format the fields.

Sending Templates for Electronic Signature

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:

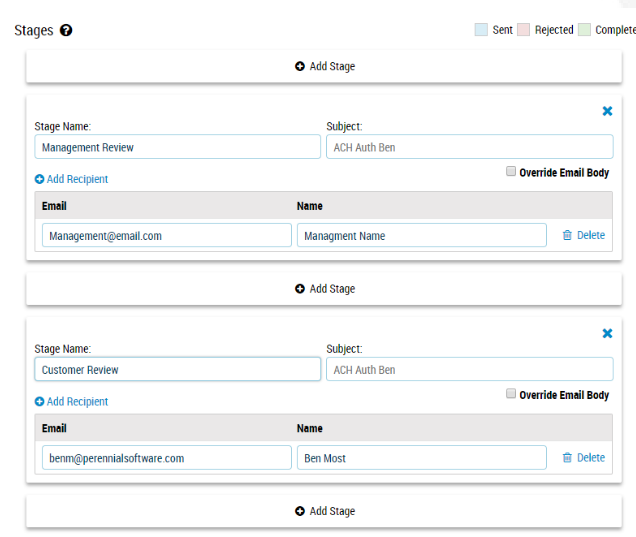
- Navigate to Home Screen or Templates tab.
- Select Send Template.
- Enter a name/description.
- Pick a form.
- Select Save.

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 look at before it gets sent to the customer, you would add a stage that would have the form sent to management before it gets sent to the recipient.

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, which will then activate the next stage and send the form to the recipient.



- **Stage Name:** Description of what the Stage is for.
- **Subject:** Usually will be just 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 desired to each 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 Date:

The date that is placed in this field determines when the document expires, which means the form is no longer available for signing. This defaults to 30 days from the current date.

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 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 Fields to Recipients:

- Click on the recipient on the left side of the screen.
- 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 in the right hand side of the screen.

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.

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 do not wish to send it.

Push Document:

You will want to have this checkbox enabled 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 reviewed everything and decided 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 rather 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 on 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 enabled through setup (under Preferences), then you can manually push a document to SedonaDocs with this button.