

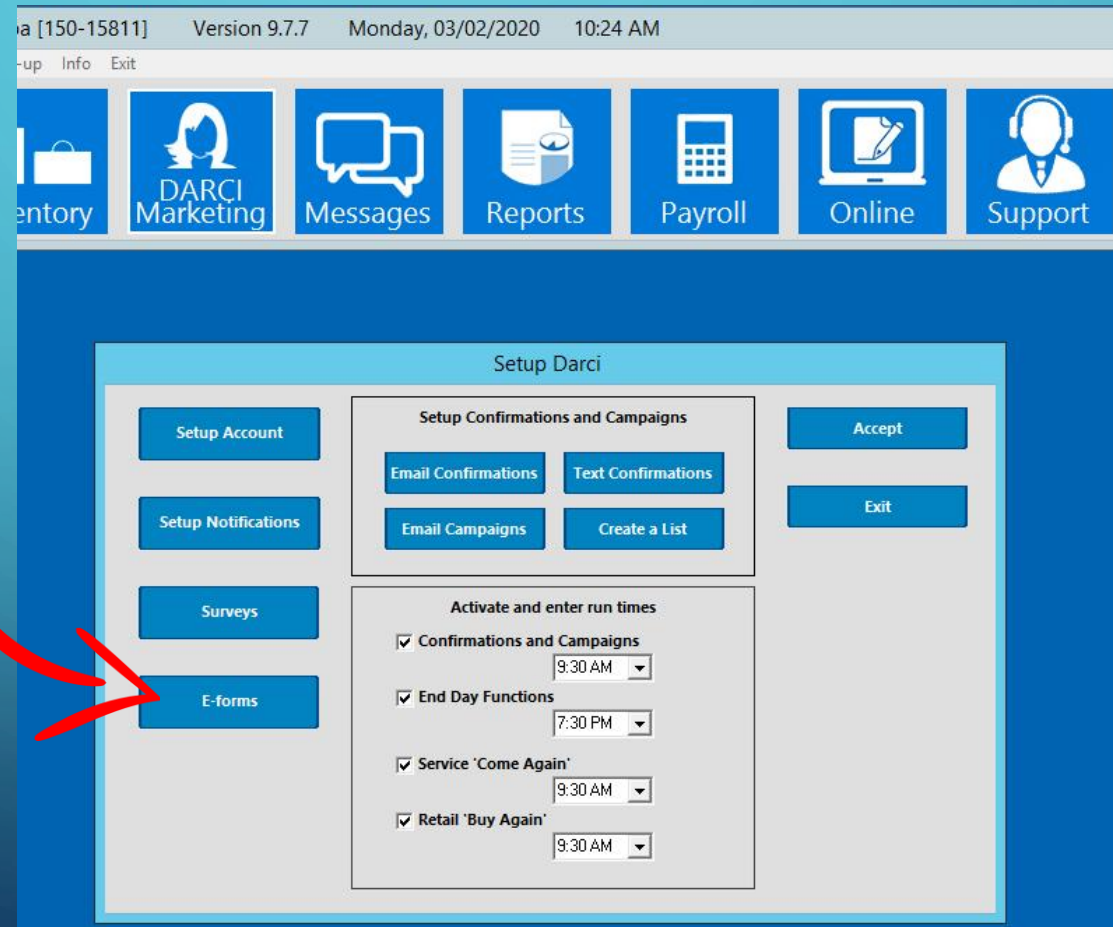


ELECTRONIC FORMS

BY PROSOLUTIONS SOFTWARE, INC.

STEP #1 - CREATE A FORM

- SELECT DARCI/MARKETING FROM THE MAIN MENU AND THEN PRESS THE BUTTON THAT SAYS E-FORMS



- START BY ENTERING YOUR FORM NAME. PROVIDE A SUBJECT LINE AND MESSAGE TO INCLUDE WITH THE FORM WHEN YOU SEND IT TO A CLIENT VIA E-MAIL.
- BEGIN ADDING QUESTIONS BY WRITING THEM INTO THE "ADD A QUESTION" FIELD. SELECT WHAT TYPE OF ANSWER YOUR QUESTION IS SEEKING (ex. "YES/NO" or "MULTIPLE CHOICE") AND CHOOSE WHETHER THE QUESTION WILL BE REQUIRED TO BE ANSWERED.
- ONCE A QUESTION IS COMPLETED, YOU MUST PRESS "SAVE QUESTIONS TO E-FORM." ONCE ALL YOUR QUESTIONS ARE COMPLETED, PRESS "SAVE E-FORM."

- YOU MAY ALSO INCLUDE AN INTRODUCTION OR TRAILER ON YOUR E-FORM TO INCLUDE INSTRUCTIONS FOR YOUR CLIENTS OR YOUR TERMS OF SERVICE.
- WHEN YOUR E-FORM IS FINISHED, SELECT "EMAIL TEST E-FORM" TO VIEW. IF YOU ARE SATISFIED, PRESS "EXIT."

Pro Salon Spa [150-15811] Version 9.7.7 Wednesday, 02/19/2020 12:38 PM

Inventory Reports Other Tools Set-up Info Exit

E-form

E-form Name
ProSo Test Form

New E-form Save E-form Email Test E-form Exit

E-form Email Subject Line
Your e-form is attached

E-form Email Message
Please be sure to fill out the attached e-form prior to your arrival for the service.

E-form Introduction
Please take the time to answer every question, thank you!

E-form Trailer
Thank you for taking the time to fill out the mandatory e-form.

Add a question to the E-form
Write your question here...

Answer is Required

Select what type of answer you want
Multiple Choice

Add choices

Add

Remove

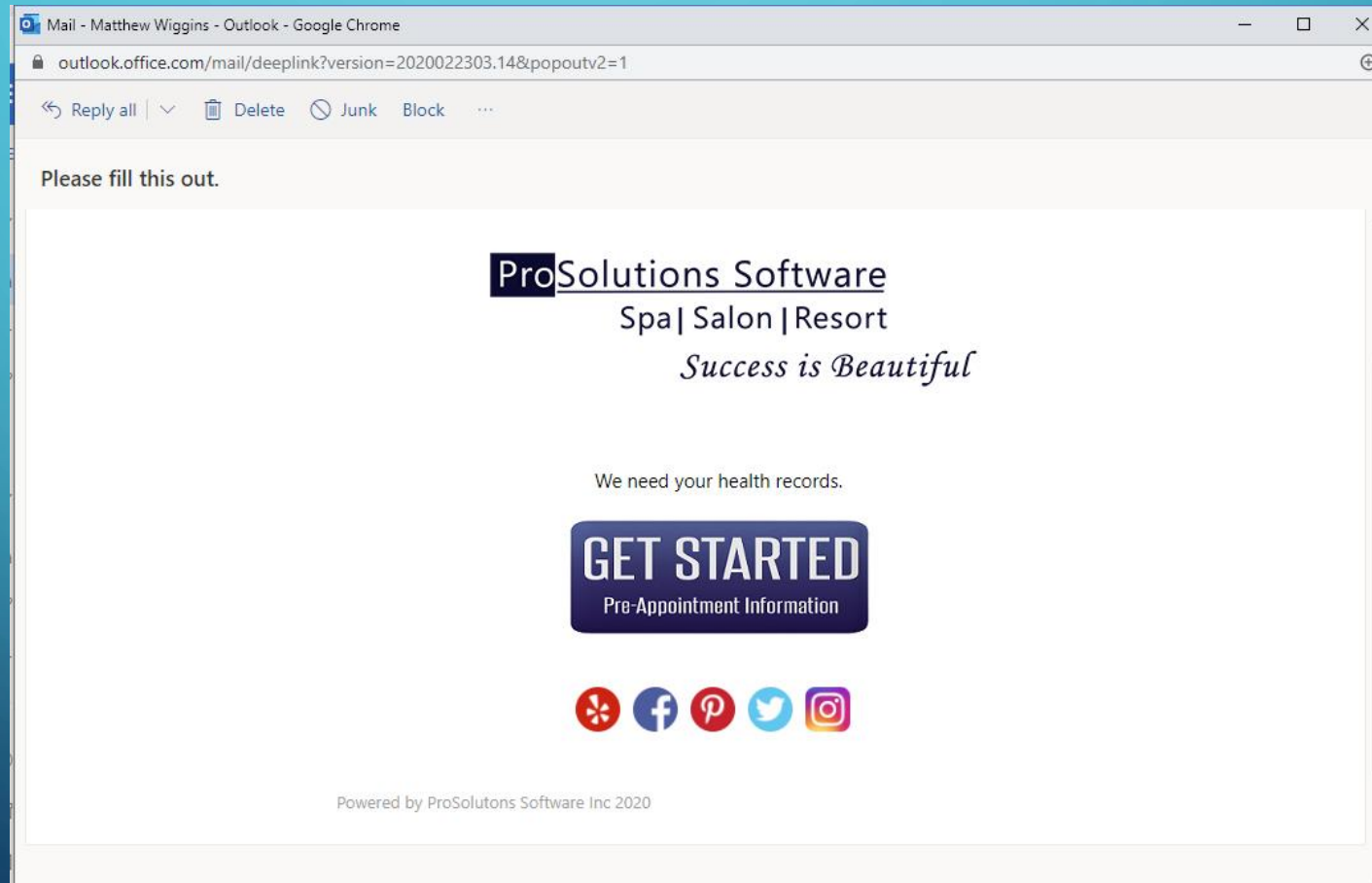
Save Question to E-form

do you smoke?
 When was your last last doctor's visit and what was it for?
 Do you have any type of rash? If so, where? Describe the severity.
 Please select which describes your skin best.

Remove Question from E-form

Online

- CHECK YOUR INBOX. YOUR TEST EMAIL WILL APPEAR WITH YOUR LOGO, SOCIAL NETWORKING ICONS, AND A “GET STARTED” BUTTON. THE SUBJECT AND MESSAGE OF THE EMAIL WILL ALSO BE INCLUDED.
- CONFIRM EVERYTHING APPEARS CORRECTLY AND PRESS "GET STARTED" TO VIEW YOUR E-FORM.



- ONCE YOU PRESS "GET STARTED" ON YOUR TEST EMAIL, YOU WILL SEE THE E-FORM YOU CREATED. (TEST FORMS SAY "NO NAME FOUND" FOR CLIENT. HOWEVER, WHEN A REAL E-FORM IS SENT, IT WILL INCLUDE THE CUSTOMER'S NAME AND YOUR LOGO / BUSINESS NAME.)
- REVIEW YOUR E-FORM AND CONFIRM THE QUESTIONS, INTRODUCTION, AND TRAILER (IF APPLICABLE) APPEAR AS YOU INTEND.

ProSolutions Software
Spa | Salon | Resort
Success is Beautiful

ProSolutions Software
Health

Client: NO NAME FOUND

this is the intro

do you smoke?

When was your last doctors visit and what was it for?

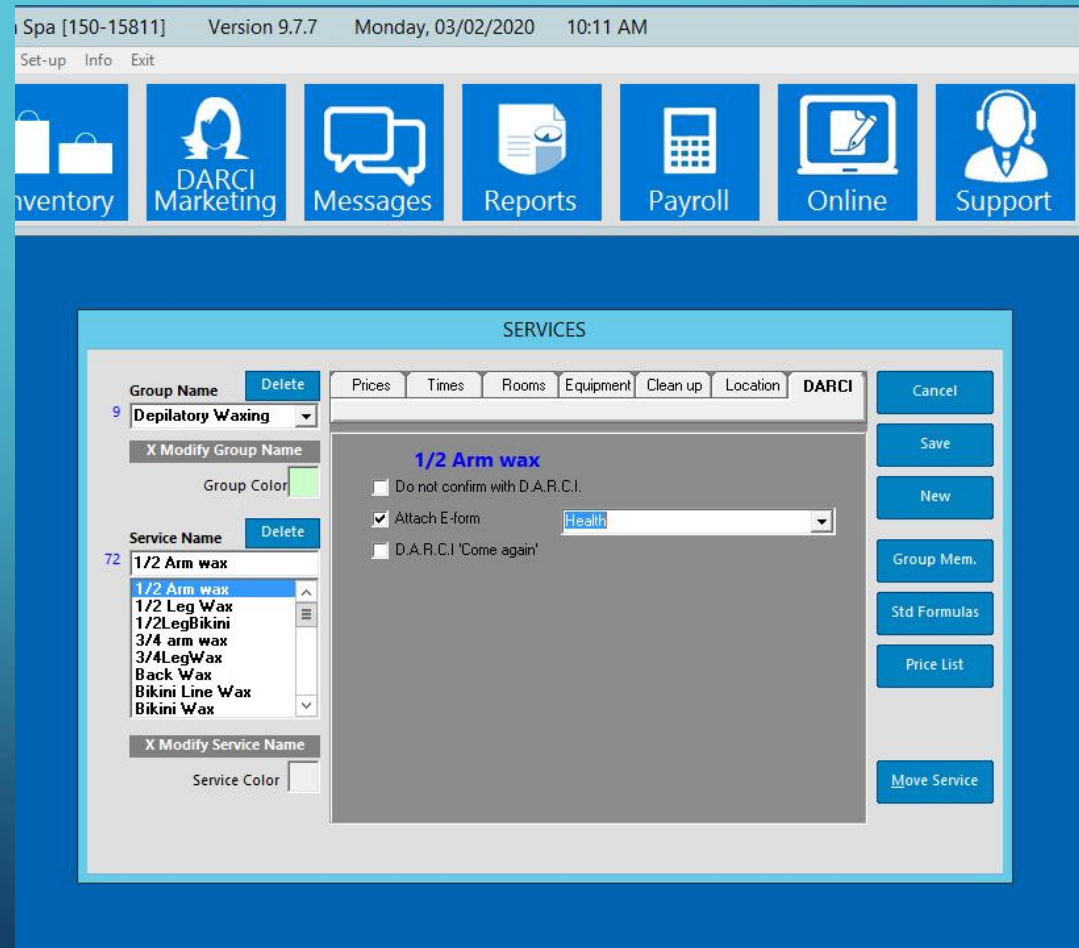
Do you have any type of rash?

Please select which describes your skin best.

this is the trailer

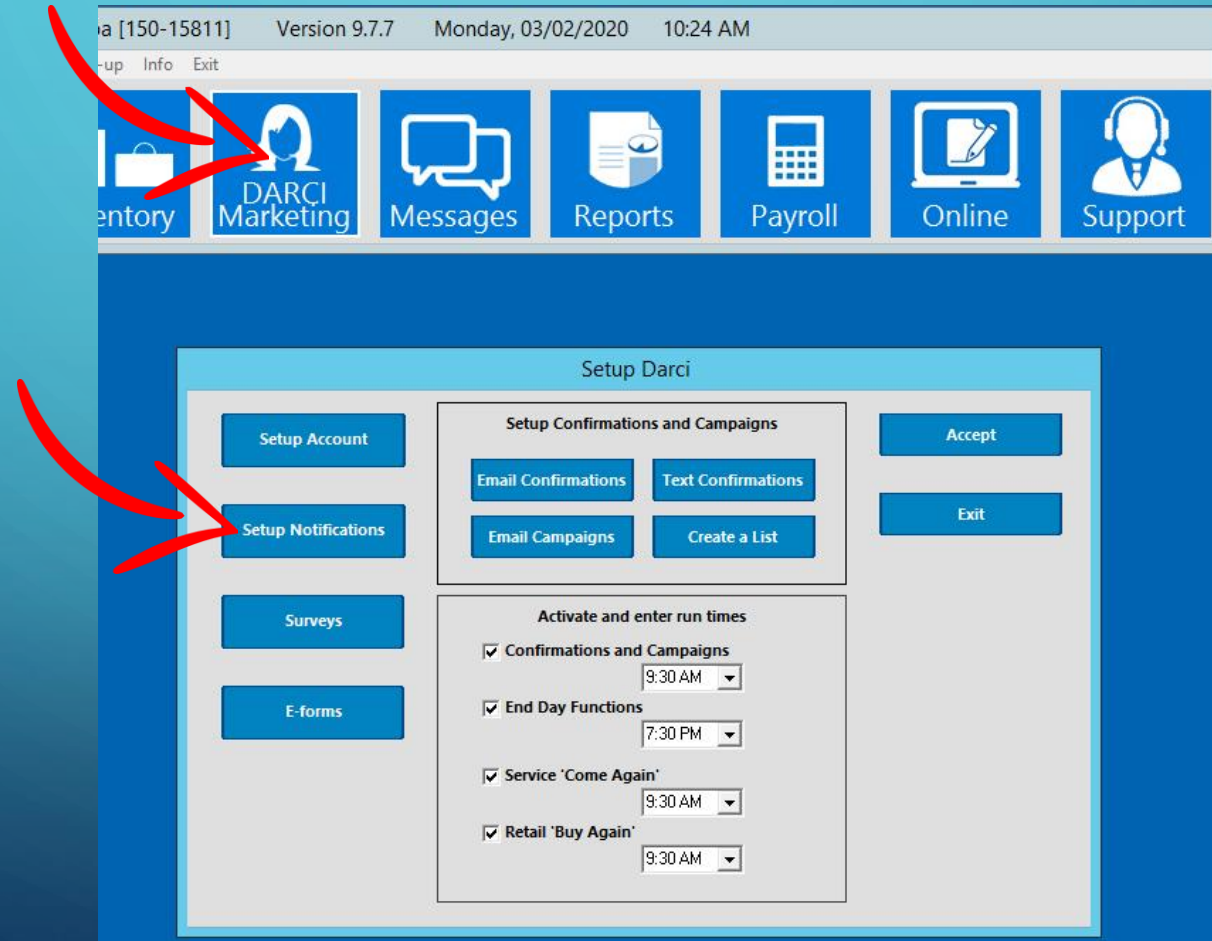
STEP #2 - ATTACH E-FORM TO A SERVICE

- FROM THE MAIN MENU SELECT SETUP < SERVICES AND CHOOSE A GROUP AND A SERVICE. THEN SELECT THE TAB LABELED “DARCI” AND CHOOSE “ATTACH E-FORM.” SELECT THE E-FORM YOU WOULD LIKE TO ATTACH TO THIS SERVICE. (YOU MAY ATTACH THE SAME E-FORM TO SEVERAL DIFFERENT SERVICES IF YOU WISH)



STEP #3 - SETUP NOTIFICATIONS

- ONCE YOU HAVE CREATED AN E-FORM, YOU MUST DECIDE HOW YOU WILL SEND THEM TO YOUR CLIENTS. TO START, SELECT “SETUP NOTIFICATIONS” IN DARCI.
- IF YOU ARE USING DARCI TO SEND EMAIL APPOINTMENT CONFIRMATIONS AND REMINDERS, THE E-FORM FOR THE SERVICE THEY REQUESTED WILL AUTOMATICALLY BE SENT WITH THOSE EMAILS.



- IF YOU WOULD LIKE TO HAVE YOUR FORM E-MAILED TO YOUR CLIENTS WHEN THEY BOOK AN APPOINTMENT, PLACE A CHECK NEXT TO “EMAIL CLIENT WHEN BOOKED/UNBOOKED” AND COMPLETE EACH MESSAGE BOX (OR YOU CAN USE OUR DEFAULT MESSAGES).
- IF YOU WOULD ONLY LIKE TO SEND BOOKING CONFIRMATIONS TO CLIENTS WHO HAVE BOOKED AN APPOINTMENT THAT REQUIRES AN E-FORM TO BE COMPLETED, SELECT "ONLY EMAIL CLIENT IF SERVICE HAS E-FORM REQUIREMENT.

Salon Spa [150-15811] Version 9.7.7 Monday, 03/02/2020 10:16 AM

Tools Set-up Info Exit

Inventory DARGI Mark DARGI NOTIFICATIONS e Support

When a cash payment is voided
 Email client when booked/unbooked
 Only Email client if service has E-form requirement
 When an operator's schedule hours are changed

Notification Message

Booking Message
 Thank you for scheduling your appointment on <DATE> at <TIME>.

Unbooking Message
 This is a confirmation that your appointment on <DATE> at <TIME> has been canceled. If this is a mistake please call us. Thank you.

Reschedule Message
 Your previous appointment on <OLDDATE> for a <SERVICE> has been rescheduled for <DATE> at <TIME>.

Save Exit

Enter any of the Key words below including the <> to insert the appropriate information into your messages. Only use <OLDDATE> in the Reschedule message.

<SERVICE> Service name
 <OP> Operator ID name
 <DATE> Current appointment date.
 <TIME> Current appointment time.
 <CL> Client's Name
 <PH> Business phone #
 <OLDDATE> Rescheduled from date.

Email closing report to Boss
 Email end-of-day report to Boss
 Email Sales Detail w/client names to operator

Save Cancel

- IF YOU WISH TO SEND AN E-FORM DIRECTLY TO THE CUSTOMER (WITHOUT IT BEING DONE AUTOMATICALLY BY DARCI WHEN CONFIRMING OR BOOKING APPOINTMENTS), OR WOULD LIKE TO VIEW A CLIENT'S COMPLETED FORMS, YOU CAN GO DIRECTLY INTO THE CUSTOMER'S FILE AND SELECT THE "E-FORMS" BUTTON.

CLIENT INFORMATION FOR MICHELLE BABCOCK

16722

First Name: Michelle Last Name: Babcock

Street Address: 12345 Main Street

City: Los Angeles State: CA Zip: 91342

Occupation: Administrator Birthday: 08/15 Anniversary: 02/14

Email Address: mattw@prosolutionsoftware.c Mailing Salutation:

Credit Card: Sv Dscnt: 10.00

Drivers License: Expires: Rt Dscnt: 0.00

Parents Name:

Cell: (310) 562-4673 Extn. GOLD Earned 7,222 Used 6,293

Home: Extn. BALANCE 929

Work: (800) 710-3879 Extn. 102

Referred By: Rf# 1 Main Operator: Angie

Attribute	First Visit	Last Visit
VF	04/02/18	01/20/20

Buttons: Series, OnAcct, GC Status, Rewards, Show Appts, Goto Appts, History, Set Popup, Formulas, Notes, In-Take, Tracking, Print, Message, Cancel, E-forms, Look Up, Save

Bottom Buttons: Pay by Check +, Confirm Text +, Confirm Email +, Email Receipts +, Text Promos +, Email Promos +

- TO EMAIL AN E-FORM DIRECTLY TO YOUR CLIENT, CHOOSE AN E-FORM FROM THE “E-FORMS” DROP DOWN MENU AND SELECT “EMAIL E-FORM.”
- IF YOU WOULD LIKE TO HAVE YOUR CLIENT FILL OUT THE FORM AT YOUR FRONT DESK, YOU CAN CHOOSE “COPY E-FORM URL” AND PASTE THE LINK INTO YOUR BROWSER.
- TO VIEW A CLIENT'S COMPLETED E-FORM(S), SELECT THE FORM FROM THE "COMPLETED E-FORMS" DROPDOWN LIST.

The screenshot displays the 'Client E-forms' application window. On the left sidebar, there is a section for 'E-forms' with a dropdown menu set to 'Health', and two buttons: 'Email E-form' and 'Copy E-form URL'. Below this is a 'Completed E-forms' section with an empty dropdown menu and an 'Exit' button. The main content area shows a form titled 'ProSolutions Software Spa | Salon | Resort' with the tagline 'Success is Beautiful'. The form content includes the text 'ProSolutions Software Health', 'this is the intro', and several questions: 'do you smoke?' with a dropdown menu, 'When was your last last doctors visit and what was it for?' with a text input field, 'Do you have any type of rash?' with a dropdown menu, and 'Please select which describes your skin best.' with a dropdown menu. The form concludes with 'this is the trailer'.

FOR ONE-ON-ONE TRAINING ON E-FORMS PLEASE CALL
(800) 710-3879 EXT. 128 TO BOOK YOUR TRAINING
APPOINTMENT.

