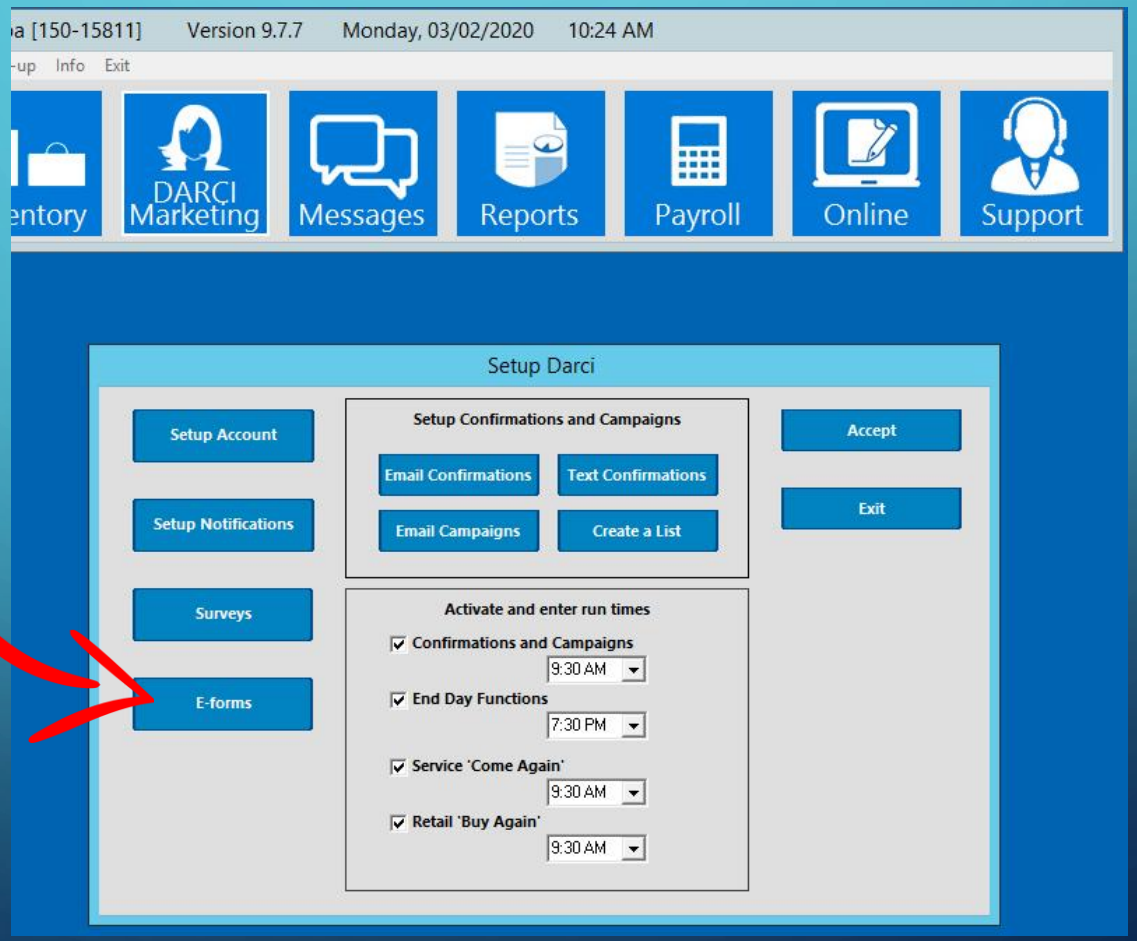
ELECTRONIC FORMS

BY PROSOLUTIONS SOFTWARE, INC.

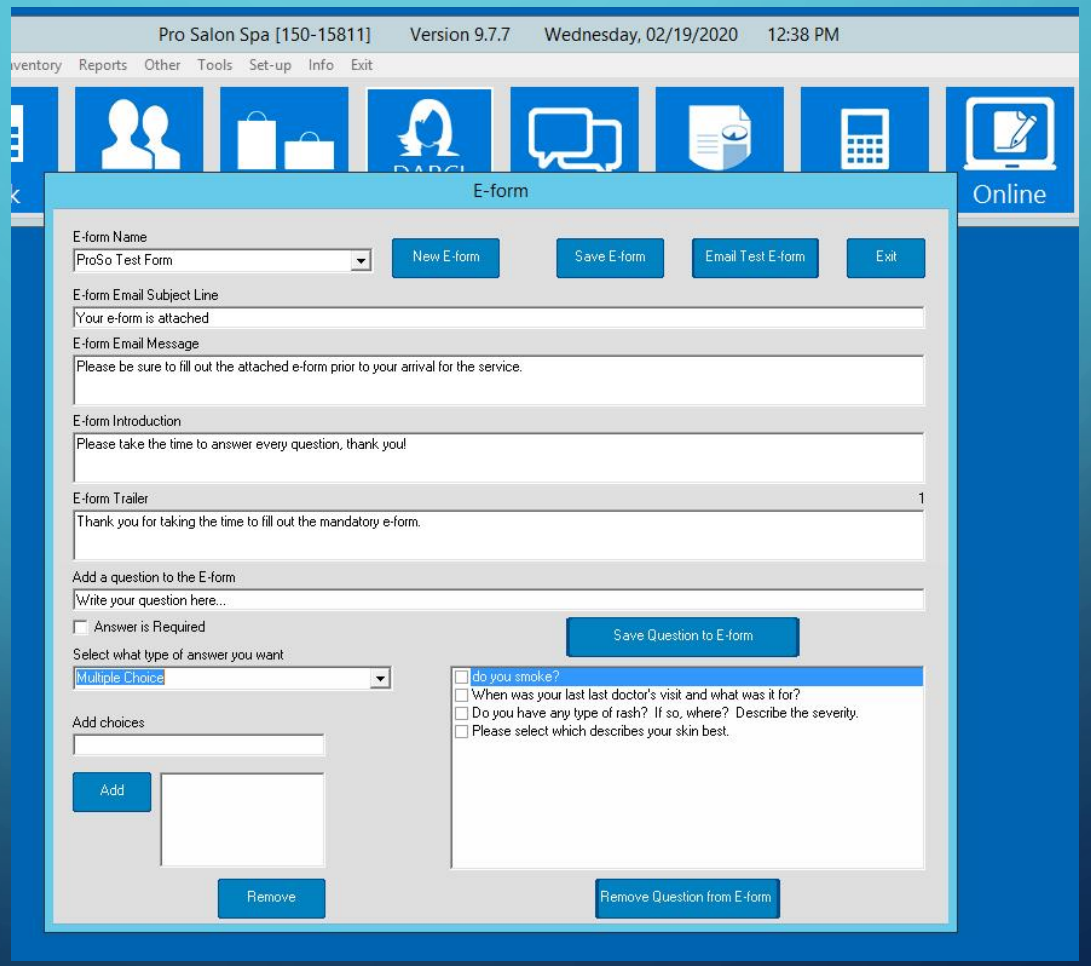
STEP #1 - CREATE A FORM

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

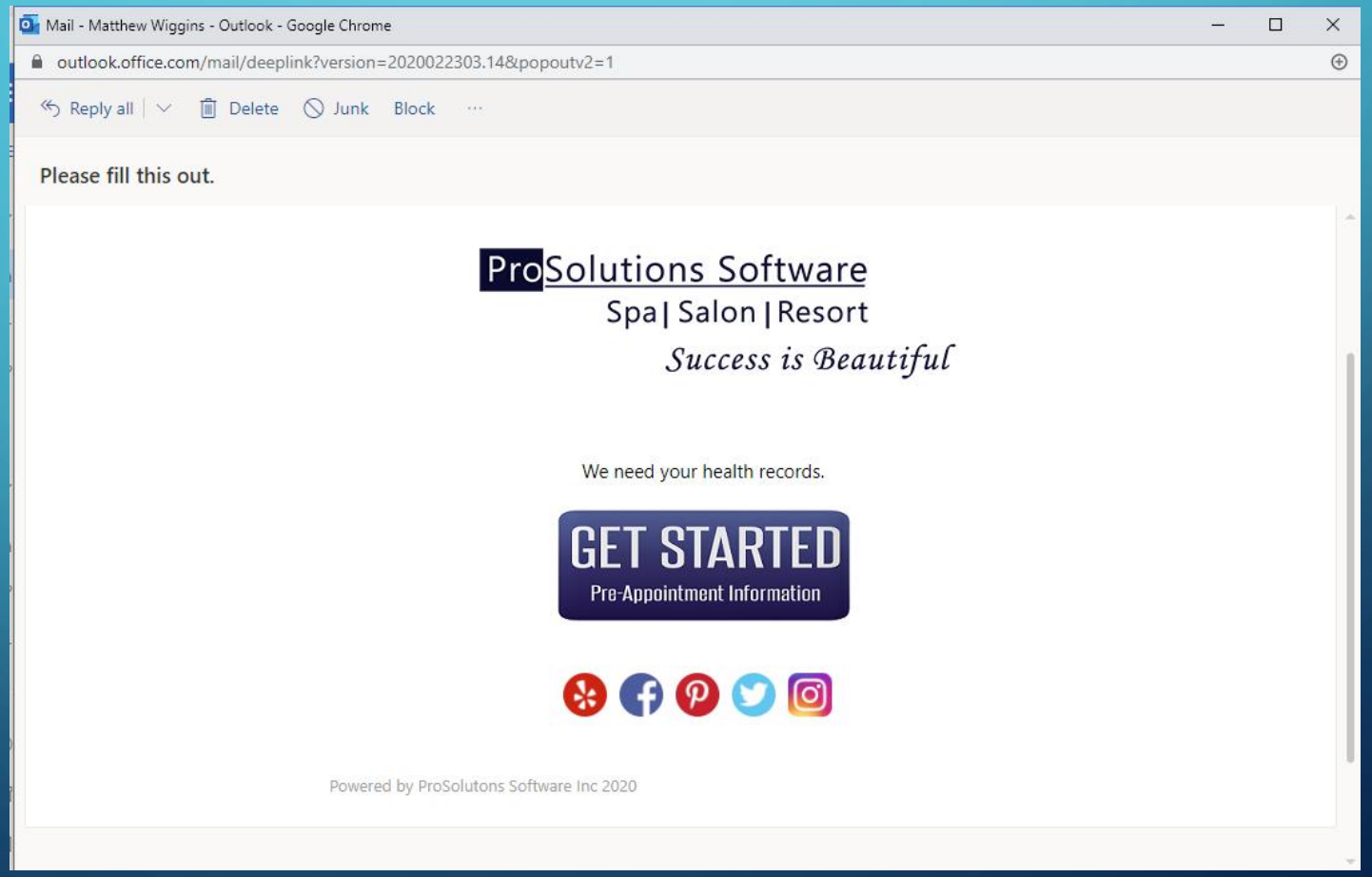


- START BY ENTERING YOUR FORM NAME. PROVIDE A SUBJECT LINE AND MESSAGE TO INCLUDE WITH THE FORM WHEN YOU SEND IT TO A CLIENT VIA E-MAIL.
- BEGIN ADDING QUESTIONS BY WRITING THEM INTO THE "ADD A QUESTION" FIELD. SELECT WHAT TYPE OF ANSWER YOUR QUESTION IS SEEKING (ex. "YES/NO" or "MULTIPLE CHOICE") AND 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.”

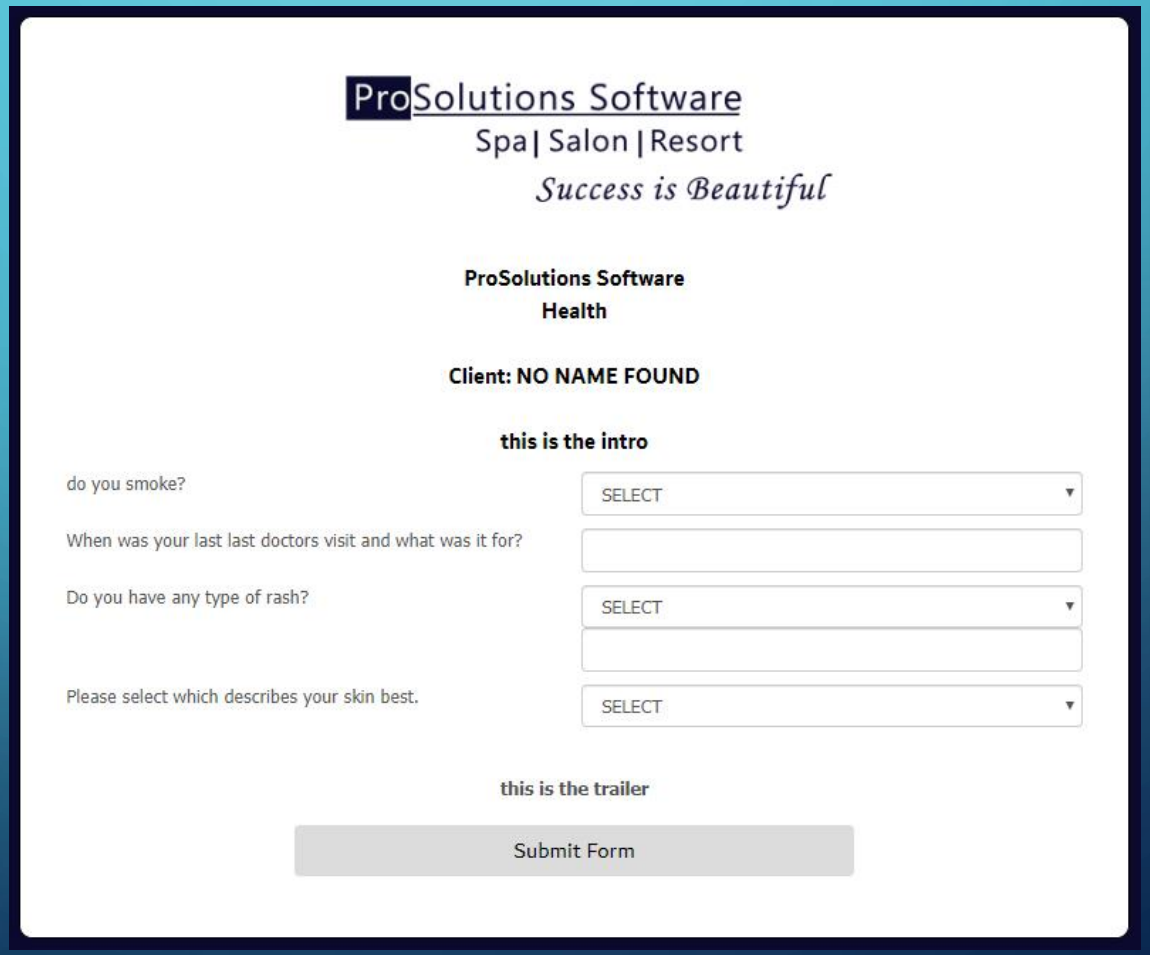
- YOU MAY ALSO INCLUDE AN INTRODUCTION OR TRAILER ON YOUR E-FORM TO INCLUDE INSTRUCTIONS FOR YOUR CLIENTS OR YOUR TERMS OF SERVICE.
- WHEN YOUR E-FORM IS FINISHED, SELECT “EMAIL TEST E-FORM” TO VIEW. IF YOU ARE SATISFIED, PRESS “EXIT.”



- 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.

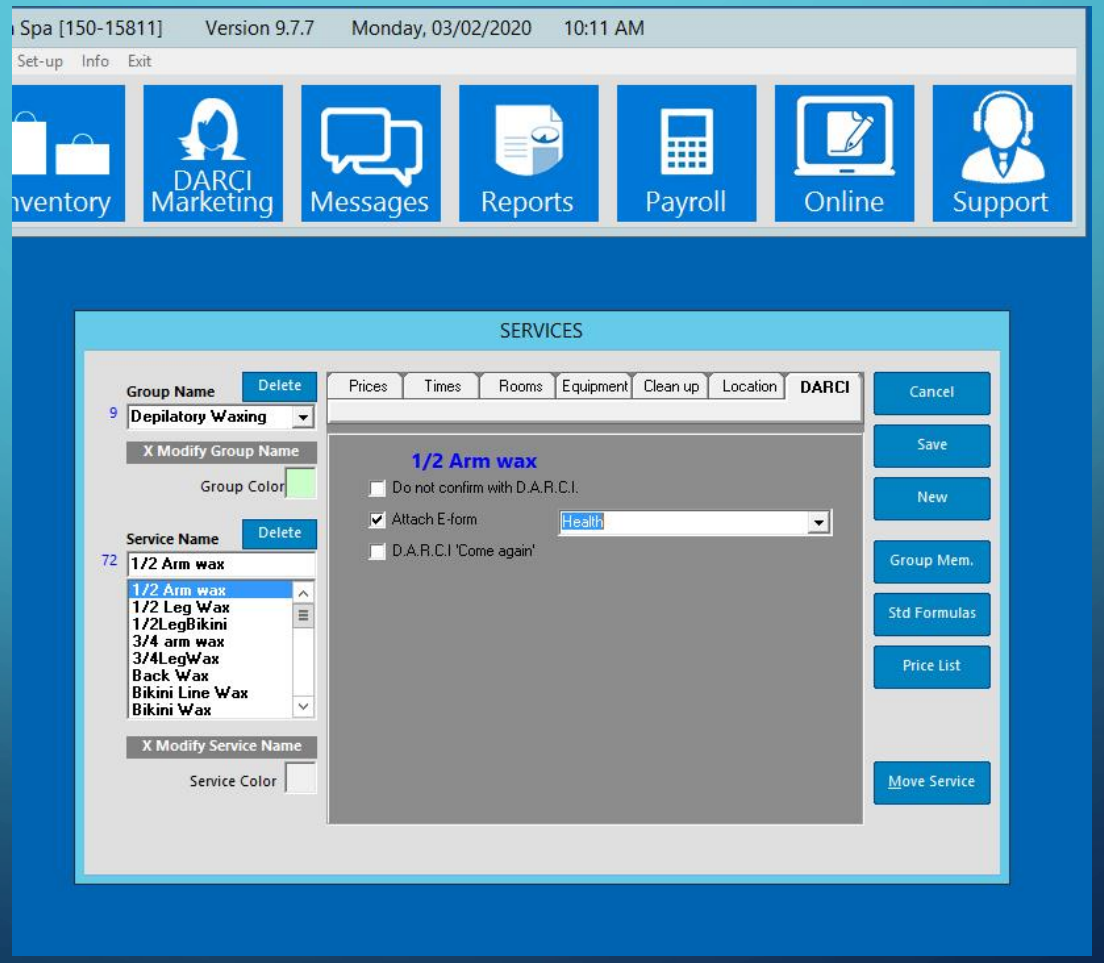


- ONCE YOU PRESS "GET STARTED" ON YOUR TEST EMAIL, YOU WILL SEE THE E-FORM YOU CREATED. (TEST FORMS SAY “NO NAME FOUND” FOR CLIENT. HOWEVER, WHEN A REAL E-FORM IS SENT, IT WILL INCLUDE THE CUSTOMER’S NAME AND YOUR LOGO / BUSINESS NAME.)
- REVIEW YOUR E-FORM AND CONFIRM THE QUESTIONS, INTRODUCTION, AND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

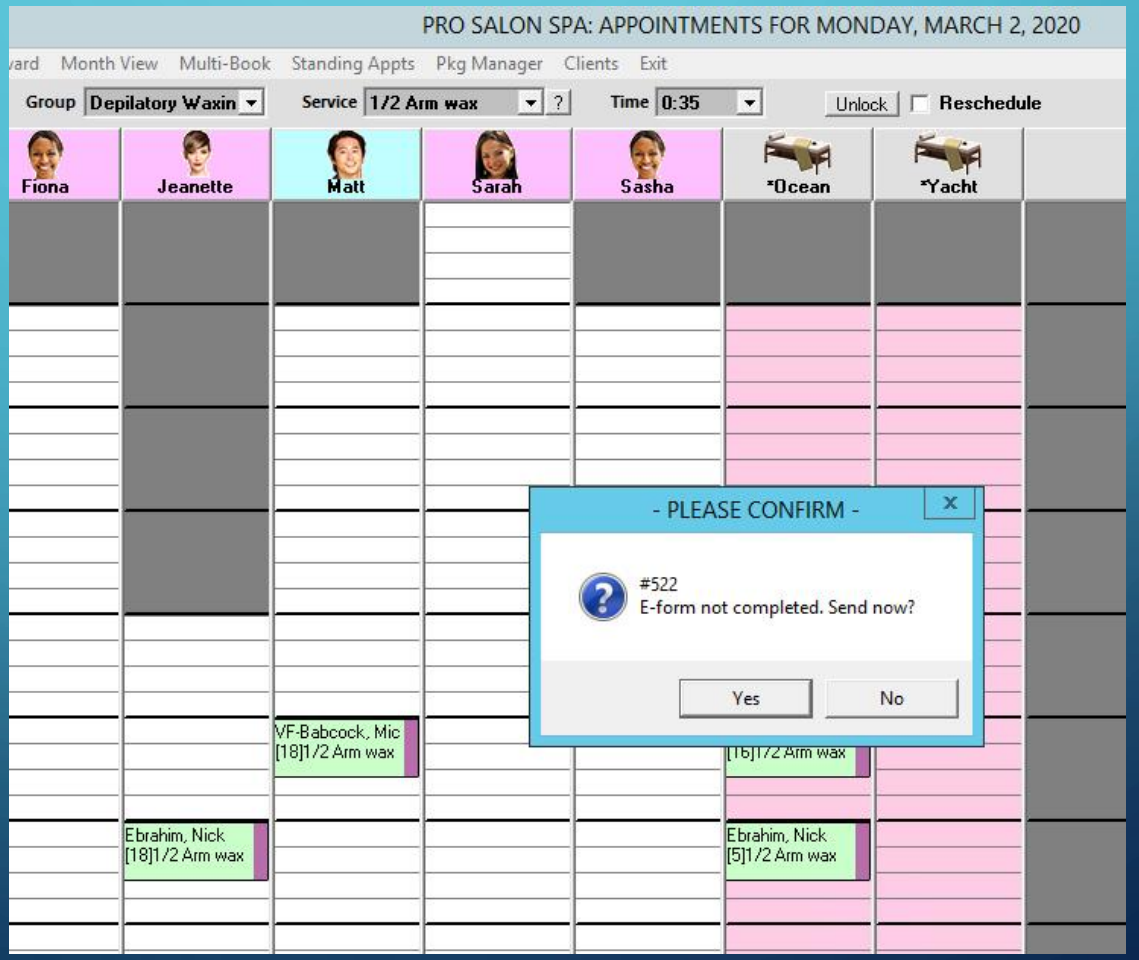


STEP #2 - ATTACH E-FORM TO A SERVICE

- 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)

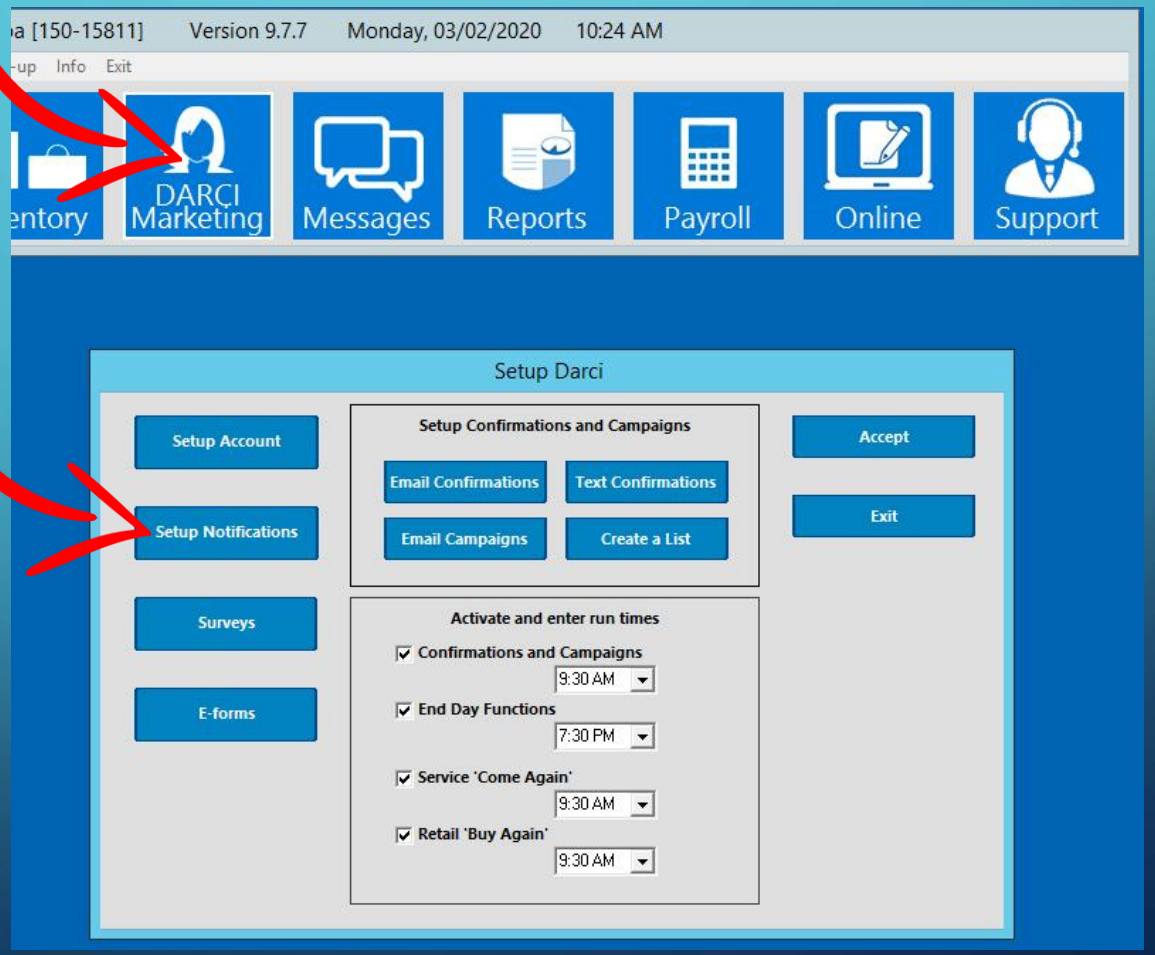


- ONCE YOU ATTACH AN E-FORM TO A SERVICE, THE FORM WILL AUTOMATICALLY BE SENT TO YOUR CLIENTS WHEN THEY BOOK AN APPOINTMENT (IF YOU SET UP NOTIFICATIONS SHOWN IN STEP #3). THE FORM WILL ALSO BE INCLUDED WITH ANY APPOINTMENT CONFIRMATIONS AND REMINDERS SENT BY DARCI.
- IF YOUR CLIENT HAS NOT COMPLETED YOUR E-FORM BEFORE THEIR APPOINTMENT, YOU WILL BE SHOWN THIS WINDOW (BELOW) WHEN YOUR SELECT "CHECK-IN." FROM HERE, YOU WILL HAVE THE OPTION OF SENDING THE E-FORM AGAIN AND HAVE THEM FILL IT OUT PRIOR TO HAVING THE SERVICE PERFORMED.

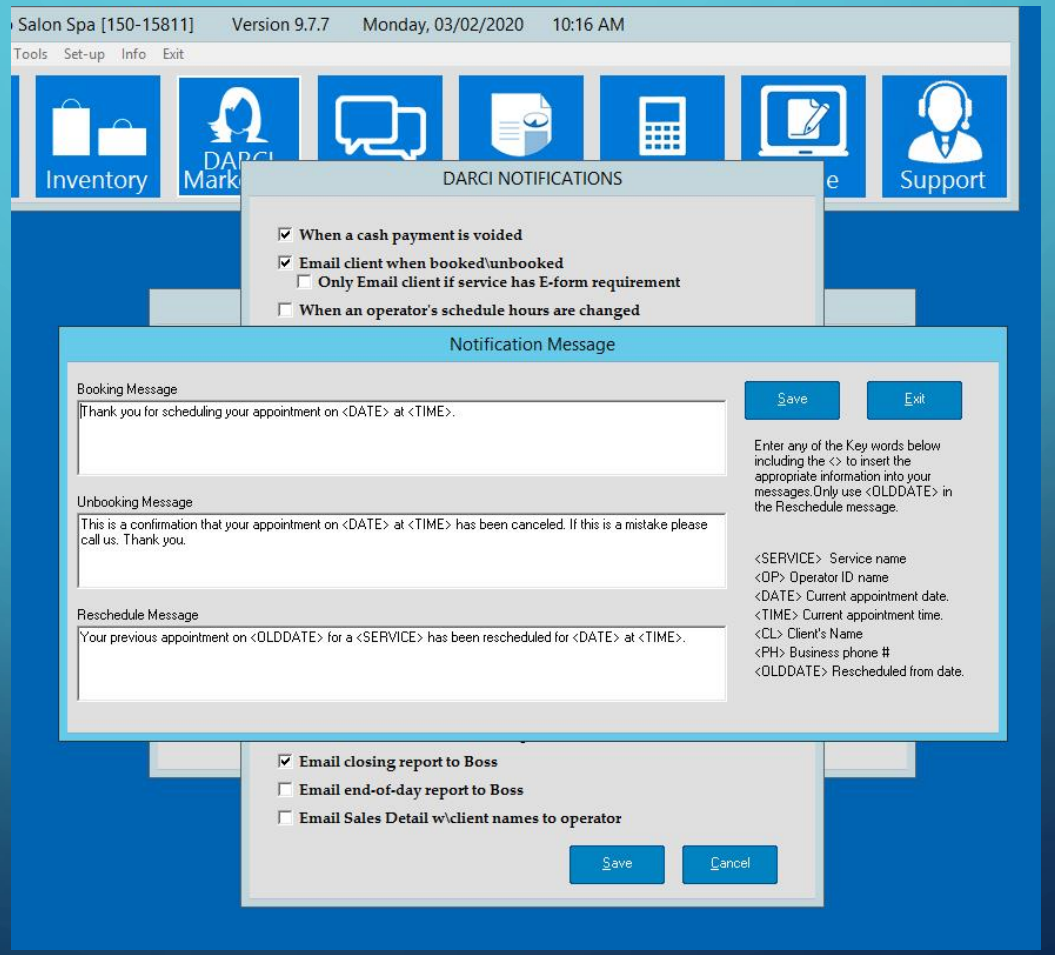


STEP #3 - SETUP NOTIFICATIONS

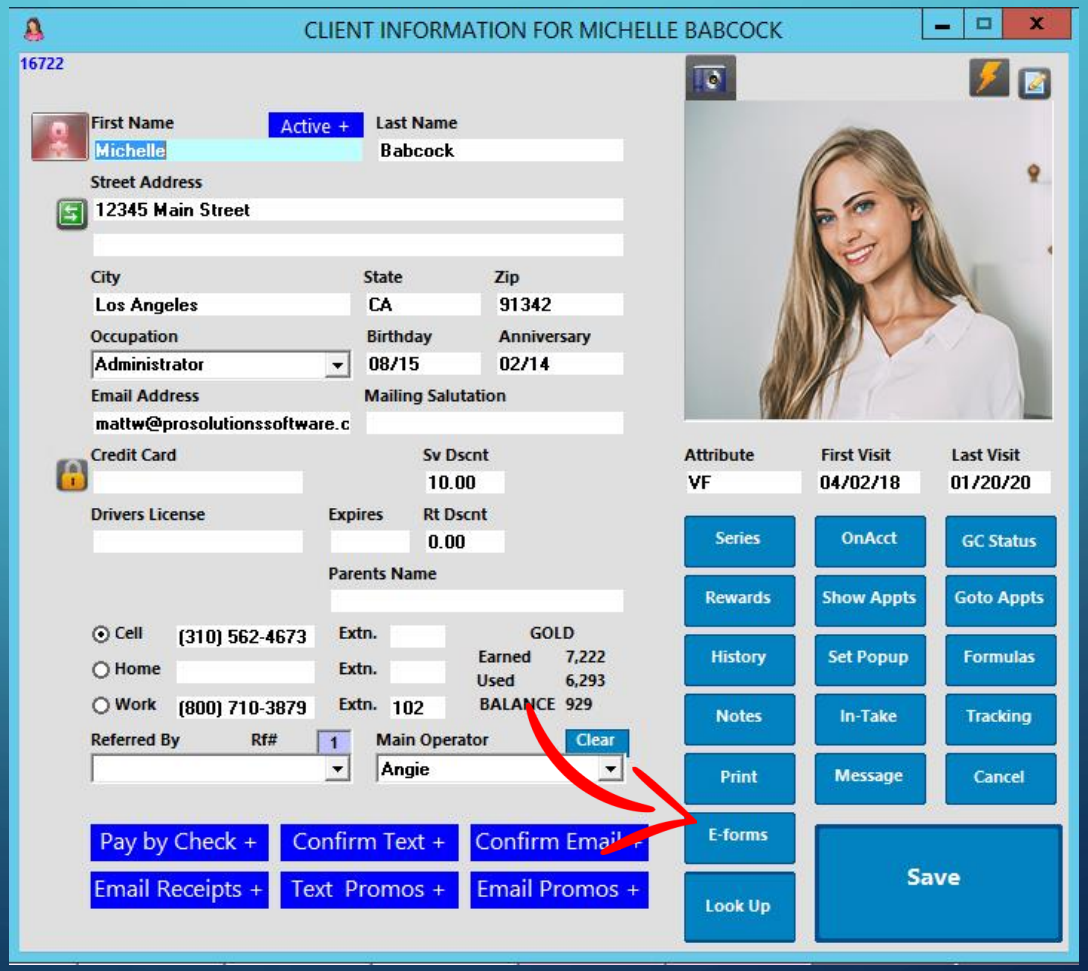
- ONCE YOU HAVE CREATED AN E-FORM, YOU MUST DECIDE HOW YOU WILL SEND THEM TO YOUR CLIENTS. TO START, SELECT “SETUP NOTIFICATIONS” IN DARCI.
- IF YOU ARE USING DARCI TO SEND EMAIL APPOINTMENT CONFIRMATIONS AND REMINDERS, THE E-FORM FOR THE SERVICE THEY REQUESTED WILL AUTOMATICALLY BE SENT WITH THOSE EMAILS.



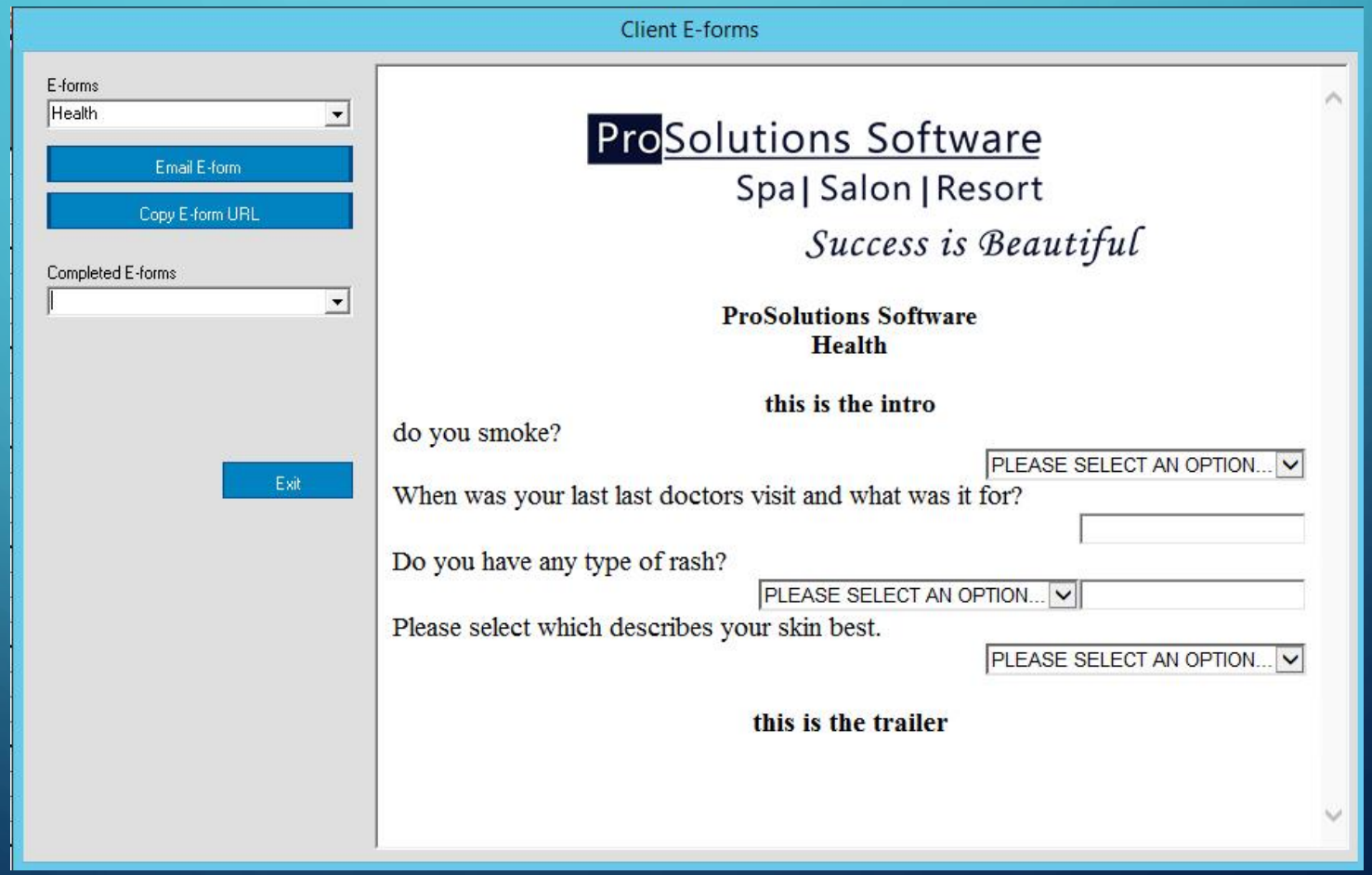
- IF YOU WOULD LIKE TO HAVE YOUR FORM E-MAILED TO YOUR CLIENTS WHEN THEY BOOK AN APPOINTMENT, PLACE A CHECK NEXT TO “EMAIL CLIENT WHEN BOOKED\UNBOOKED" AND COMPLETE EACH MESSAGE BOX (OR YOU CAN USE OUR DEFAULT MESSAGES).
- IF YOU WOULD ONLY LIKE TO SEND BOOKING CONFIRMATIONS TO CLIENTS WHO HAVE BOOKED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



- 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.



- 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.



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