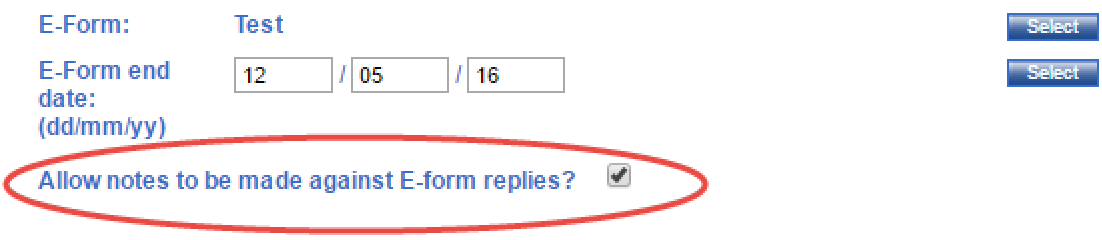
E-Forms Workflow Management Help Guide

- Create your E-Form as normal.
- Set up the E-mail, load recipients and enter a title as normal, and load the correct E-Form.
- Above the message area the tick box option to ‘Allow Notes’ is displayed, and **will** be ticked as a default. **Untick** the box **to remove** this feature from your E-Form. (Once unticked and the e-mail sent, this feature cannot be turned on for responses, so must be enabled when sending).



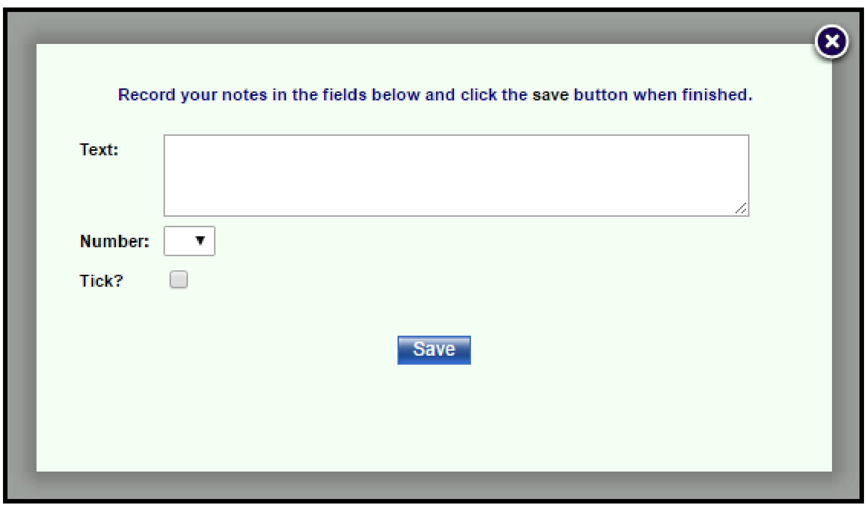
The ‘Allow Notes’ option

- Send the E-mail to recipients as you usually would.

- Once recipient responses have been received, click ‘Sent Messages’ and ‘Open Details’ to view E-Form responses.
- Once the E-mail Message modal window has loaded, notes can be added to responses. To do this, click the ‘Add Notes’ icon under ‘Actions’ on the far right-hand side.

The ‘Add Notes’ Icon

- The additional notes modal window will load.



The ‘Additional Notes’ Modal

There are three options for additional notes:

- A comments field for text
- Assigning a number to a response
- A tick box option

- Populate these fields for each response as necessary. The fields are untitled to allow Administrators flexibility when using them.

Note Text	Note Number	Note Tick	Actions
Reply received and processed	1	Y	

An Additional Notes Example

The additional notes can have a variety of uses. The number field can denote which administrator read the response, or can which stage of processing a response is at. The tick box can be used to show which responses have been completed and read, or possibly if tickets have been sent out for a production.