(a brief guide to)

PROPCO®
Webforms & E-Sign Enhancements

Early Access Version 21.0.3

28th Feb 2019

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Your feedback is important for us and vital for improving our service, please email your feedback on this user guide to manish@propco.co.uk

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Change Log

S.No	Details	Date	Changed by
1	Negotiations module renamed to Webforms	11th Feb 2019	Manish Sharma
2	i. Contents page updated ii. Screenshots updated to reflect new labels Iii. How it works section expanded and the whole process described with greater clarity iv. Audit Timeline – status types added v. Unapproved changes section added vi. Comments section expanded vii. Access Control section added	27th Feb 2019	Manish Sharma

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Introduction

We are really excited to introduce to you a new set of features to PropCo that will open up a new way for you to communicate with your clients that hitherto was not possible.

Traditionally, most communication that you engage in with your clients is via the traditional channels like phone, email, or in person which has to be recorded and processed manually. For instance, a Negotiator may be trying to win an instruction and has to update the System each time to record the progress. Sure, this works but has it's limitations. What if they don't record everything? Or the landlord doesn't respond to emails or can't be bothered to type up a response? Even once they have agreed to proceed, someone has to do all the admin to transfer the result of their communication to the system manually and then produce documents or process that information in some way. Mistakes can happen! The admin teams could change a key clause that might jeopardise the deal or the contract with your customer. Wouldn't it be nice, if you were able to surface just the right parts of the document to your clients via an online form that they can interact with, and the results reflected on the document templates for them to sign? That's exactly what we have done!

The **Webform** module therefore should be seen as a new form of communication that you can have with your clients can whatever the business context, e.g. when negotiating Terms of Business, Rent, Deposit adjustments etc. Additionally, we have enhanced the product to offer you greater flexibility when it comes to electronically signing documents. You would like the recipient to add a comments, fill something in, express choices via buttons or drop downs, or even sign offline with a wet signature? No problem, now you can do it through the enhancements we have made.

We hope you like these enhancements and we look forward to your feedback.

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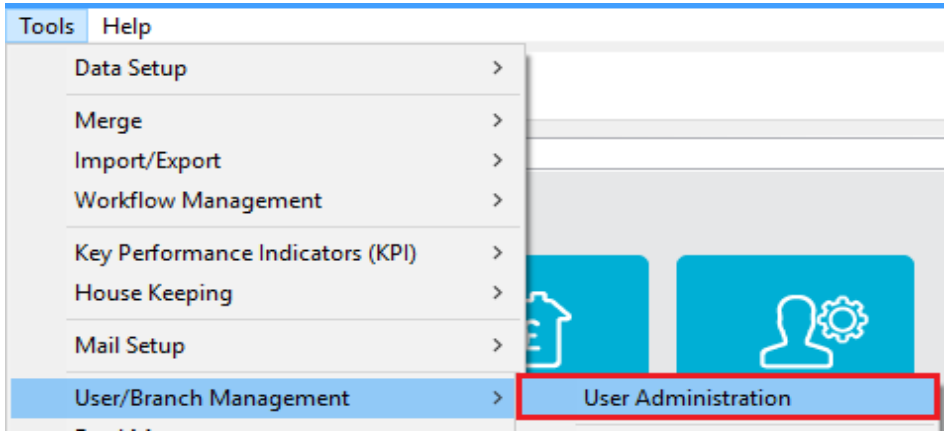
Setting up a Webform Template

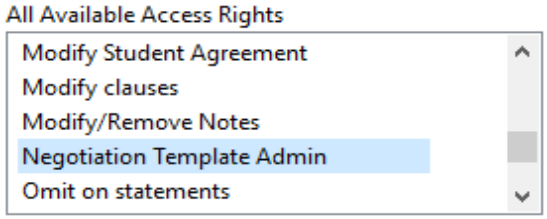
Creating a Webform Template

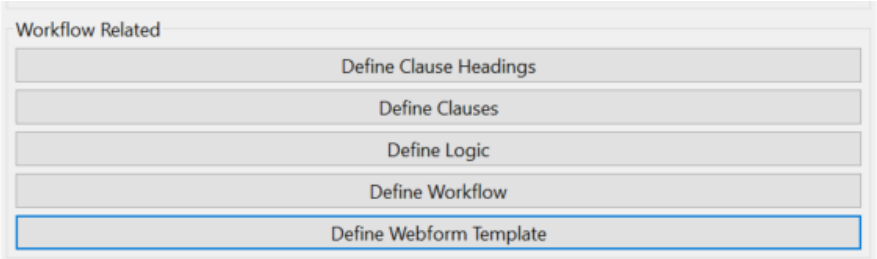
From Tools > User/Branch Management > User Administration

Click Define Webform Template

You need to have Administrator access or the relevant access permissions to access the User Admin Console, including the 'Webform Template Admin' permission.







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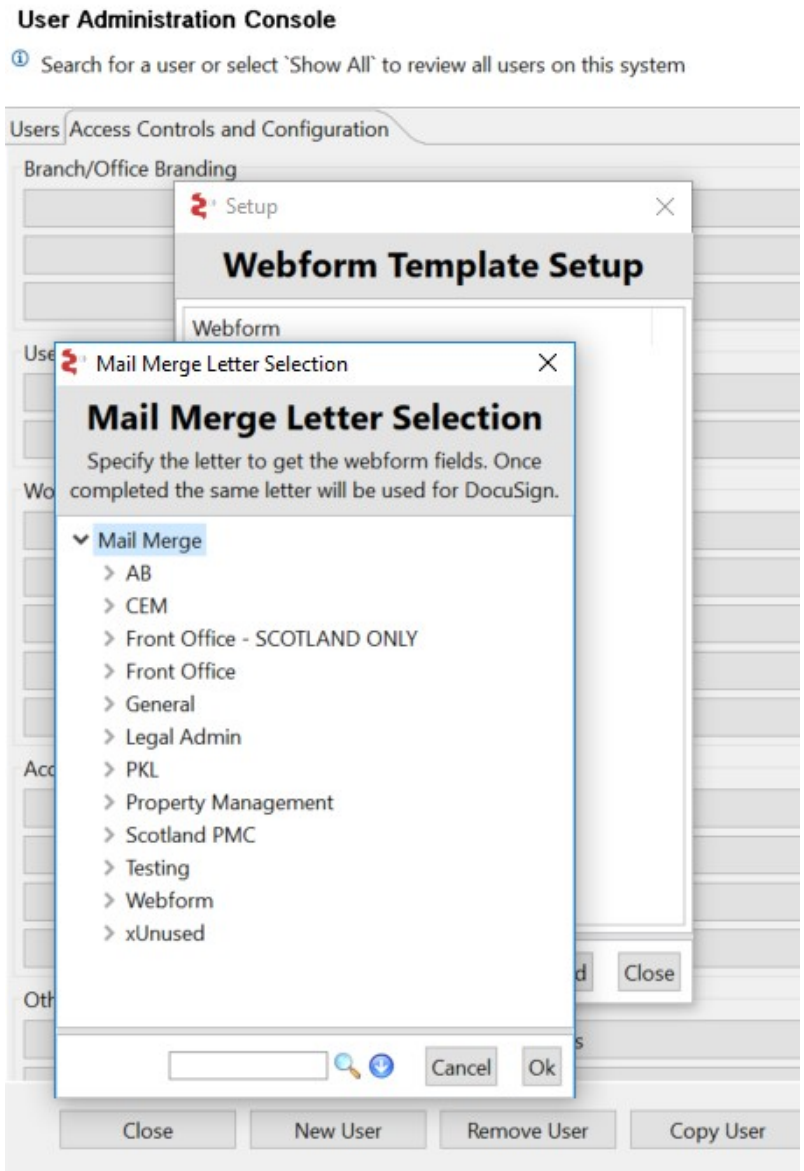
Setting up a Webform Template

Click Add;

Next, select a mail merge document that you want to create a Webform Template from



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Setting up a Webform Template

Letter name

Template name

Optional description

Merge field selector. Select the field and click Add

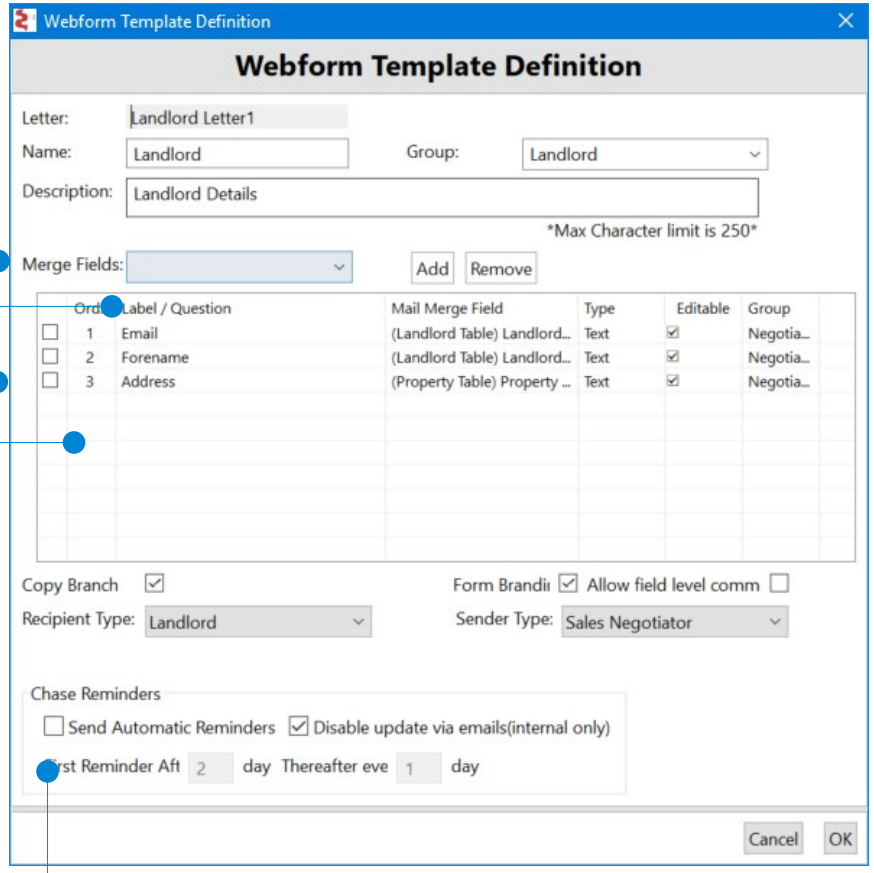
Label/Question: Label for the field on the web form

Tickbox: For selecting a merge field(s) for removal

Order: For defining the order of the fields on the web form

Copy Branch: Copies all responses from the recipient goes to the branch email address. Selected by default.

Recipient Type: Who the recipient for the web form is. e.g. Landlord, Tenant, Co-Tenant. Applicant, Guarantor, Contractor.



See 'Webform Chasing' section of the user guide

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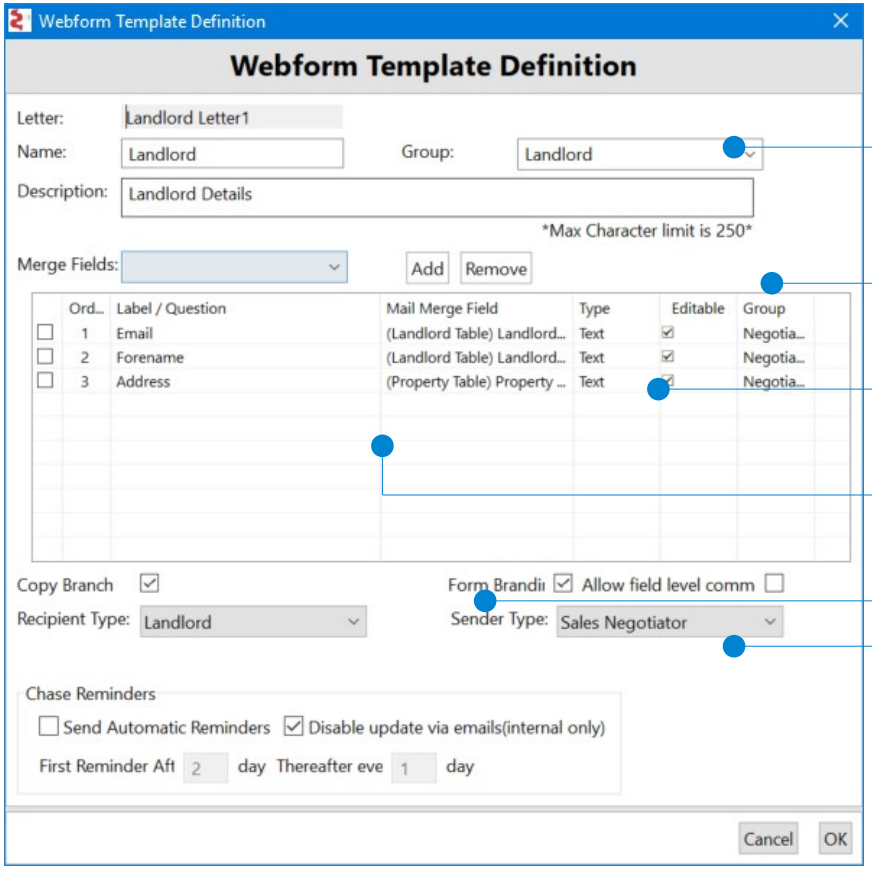
Setting up a Webform Template



Template Group: For organising templates into groups. Previously used group names can be selected by typing into the box.

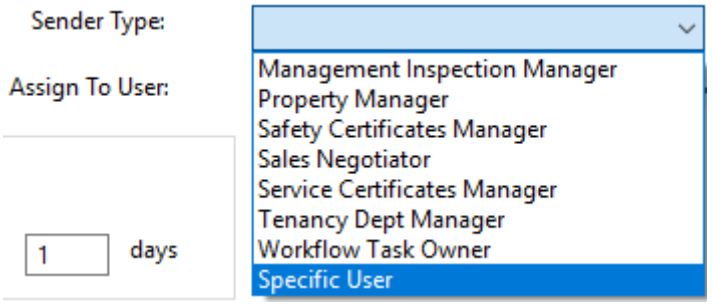
Field Group: For organising templates into groups. Additional groups can be added from Tools → Data Set up → User Lookup → Webform Field Group

Negotiable: Allows the sender & receiver to edit the field on the web form.

Merge Field: Displays the merge field name. Non-editable.

Form Branding: Uses the branch branding

Sender Type: For defining who sends th e web form to the Recipient and receives any responses. See options below.



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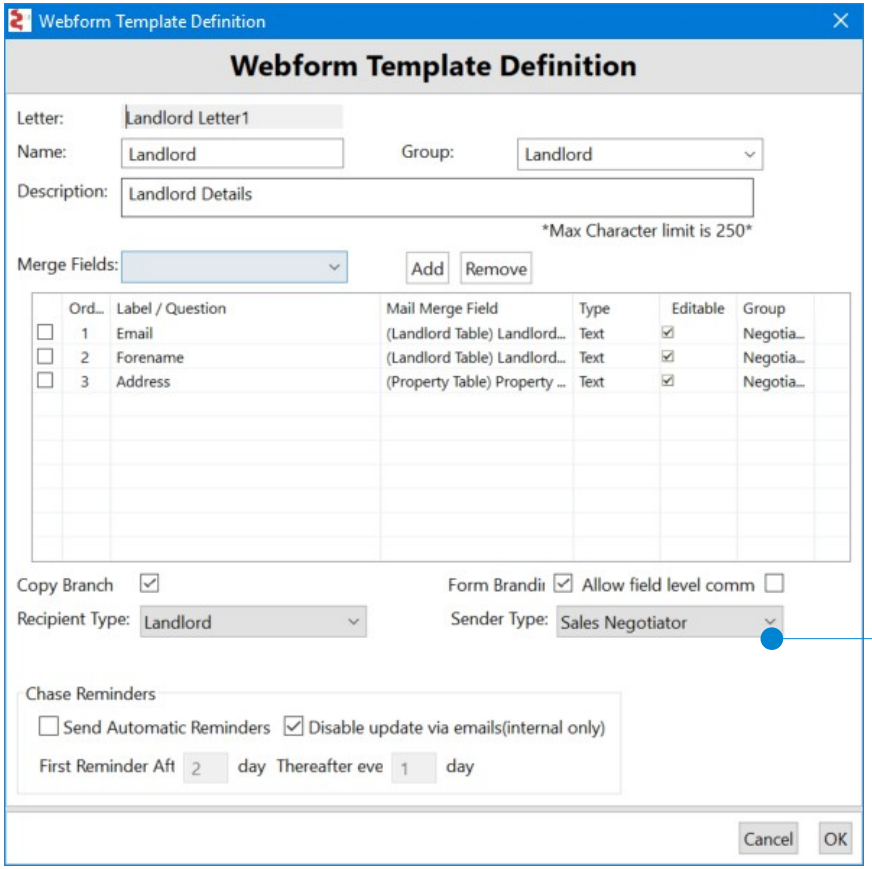
Setting up a Webform Template



Sender Types:

The following are picked up from User Assignments tab within the property record:

- Management Inspection Manager
- Property Manager
- Safety Certificates Manager
- Sales Negotiator
- Service Certificates Manager
- Tenancy Dept Manager

If any of these are blank, then the Sender defaults to the Property Manager and where property manager is not set, it will default to the Branch Manager. If Branch Manager is not specified then it would default to the user specified under System Options (new)

Where Webforms have been triggered via a workflow, the Sender can default to whoever owns the workflow task by using:

- Workflow Task Owner

Specific User option can be used for selecting a user from the list of users.

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How it works

Definitions:

“Level 1 (L1) Recipient” or “Sender” – is the member of staff who receives the Webform initially for them to review and modify, as appropriate. This could be a Negotiator, Property Manager, Workflow Task Owner, or any other PropCo User, for example.

“Level 2 (L2) Recipient” or “Recipient” - is someone whom the Sender forwards the form to for completing online. This could be a Landlord, Tenant (including Co-Tenant) , Applicant Guarantor or a Contractor.

Overview:

Webform process can be started either from an Entity (e.g. LL, TT, Applicant etc) in PropCo or via Workflow. The Webform created from a mail merge template on PropCo is first emailed to the L1 Recipient. The L1 Recipient then checks the form, edits if needed. They can either submit the form to the L2 Recipient for their review or Accept/Approve it on their behalf. If they decide to email it to the Recipient, they will receive an email with a link to the form. The Recipient can either make changes and send it back to the Sender for their review. This cycle can repeat any number of times.

Alternatively, the Recipient can accept the Form by clicking ‘Terms Agreed’. They will be asked to enter a One-Time Password (OTP) that’s sent to their registered mobile number and send the form to sender to Approve. Any changes made by one party are highlighted to another. Once Approved, the contents of the form are written back to the PropCo Database from where they can they can be reflected onto Mail Merge documents that are output in the normal way including E-Signature or used in any other process.

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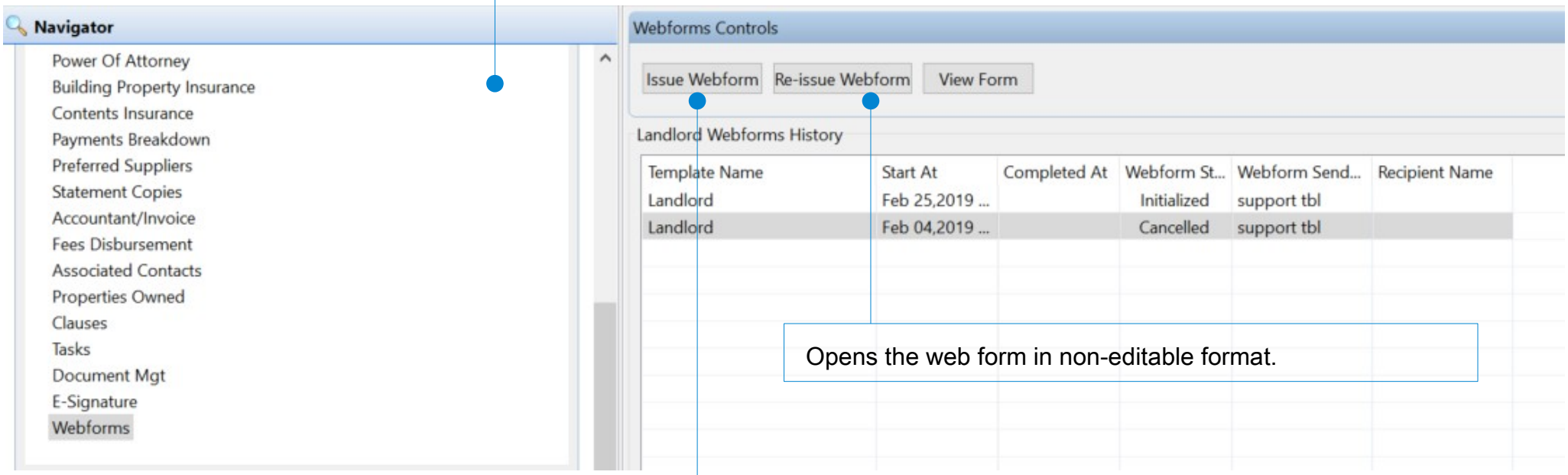
Webforms Tab

(Landlord, Tenant, Applicant, Contractor)

Link to the online form can be issued to the recipient by going to the relevant record e.g. Landlord, and then by clicking 'Issue Webform' under the Webforms tab



Opens the web form in non-editable format.

Cancel the previous Webform and start a new Webform using the same template.

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Issuing the Webform

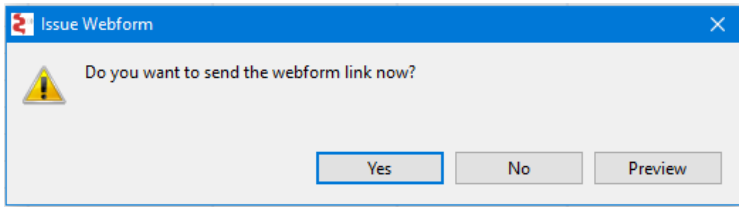
(to L1 Recipient/Sender)

Starting Webforms via Entity (e.g. Landlord)

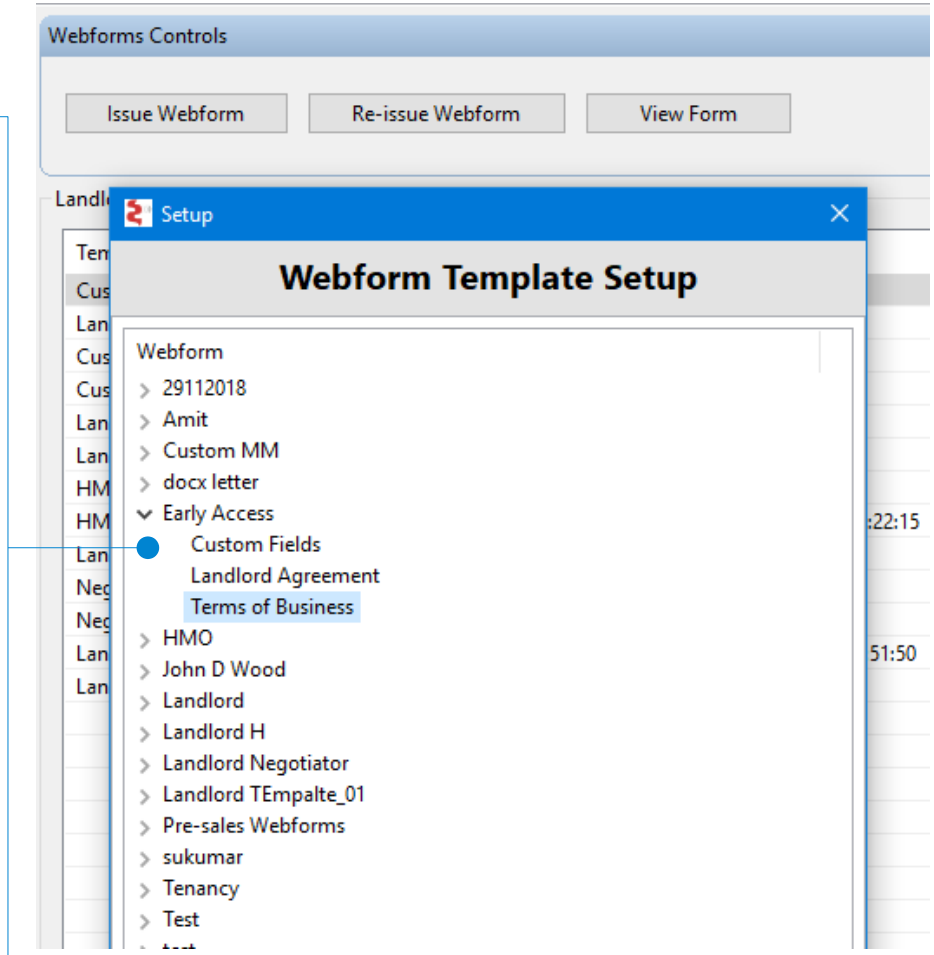
Step 1: Click Issue Webform

Step 2: Select a Template

Step 3: Click Yes



Nb: Use Preview to see what the form looks like before sending.



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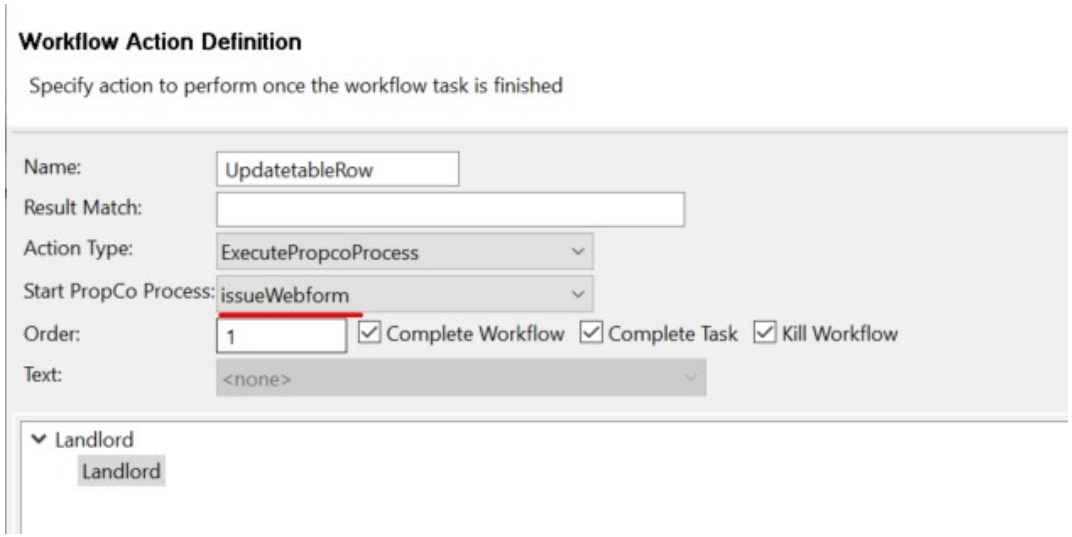
Issuing the Webform

(to L1 Recipient/Sender)

Starting Webforms via Workflow

This can be done by configuring the Workflow action to issue the webform within any workflow.

SETUP: Select Action Type as 'ExecutePropCoProcess' and select Action 'IssueWebform' in the Start PropCo Process drop down; then select the Webform template from the list below. Then, action the workflow as normal and the user will be prompted to issue the form link to the recipient when the go through the steps in the workflow.

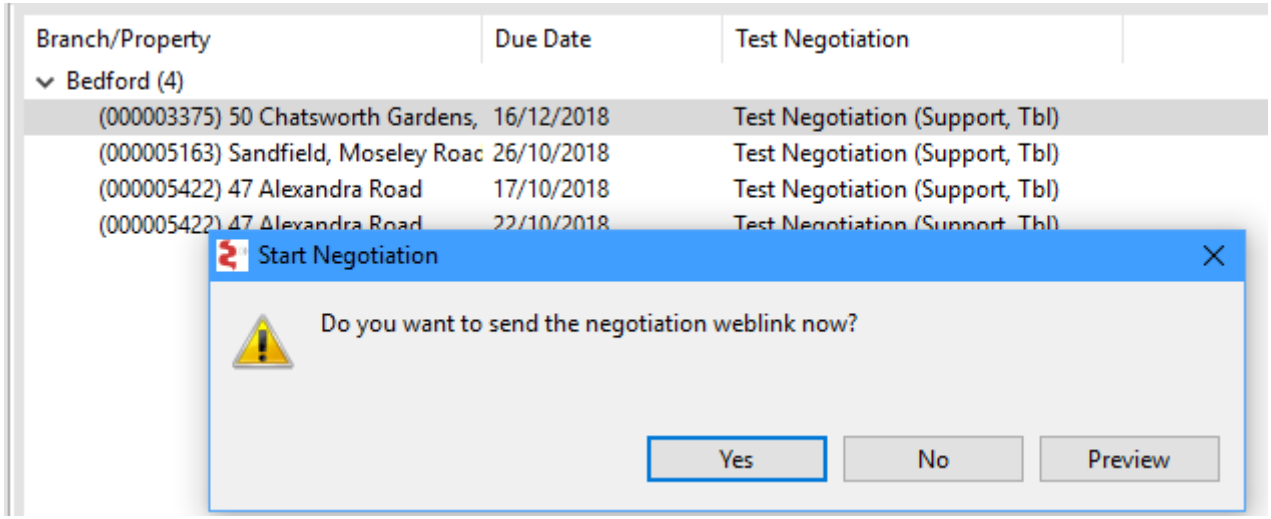


NOTE: A new workflow trigger has been added called WebformStatusChange which monitors any change in the webform's status.

Issuing the Webform

(to L1 Recipient/Sender)

Once the Workflow is started or reaches the appropriate stage when Webform is required, action Task and click Yes



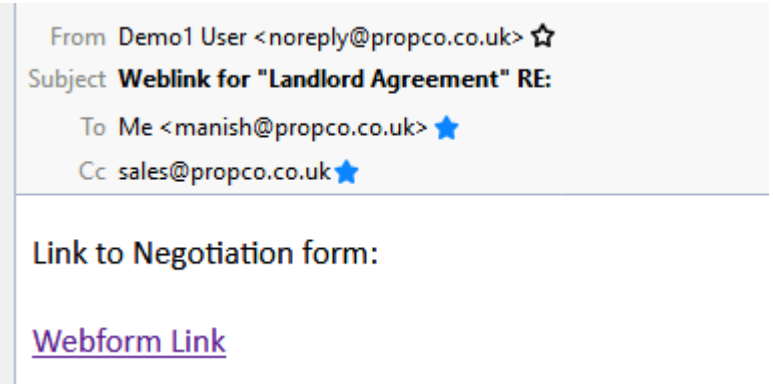
It is possible to see what the form looks like by clicking Preview

Issuing the Webform

(to L1 Recipient/Sender)

Whether triggered from the entity record or workflow, in either case a web link is emailed to the Level 1 Recipient (Sender) as per the Webform Template.

Example below.


From Demo1 User <noreply@propco.co.uk>
Subject **Weblink for "Landlord Agreement" RE:**
To Me <manish@propco.co.uk>
Cc sales@propco.co.uk

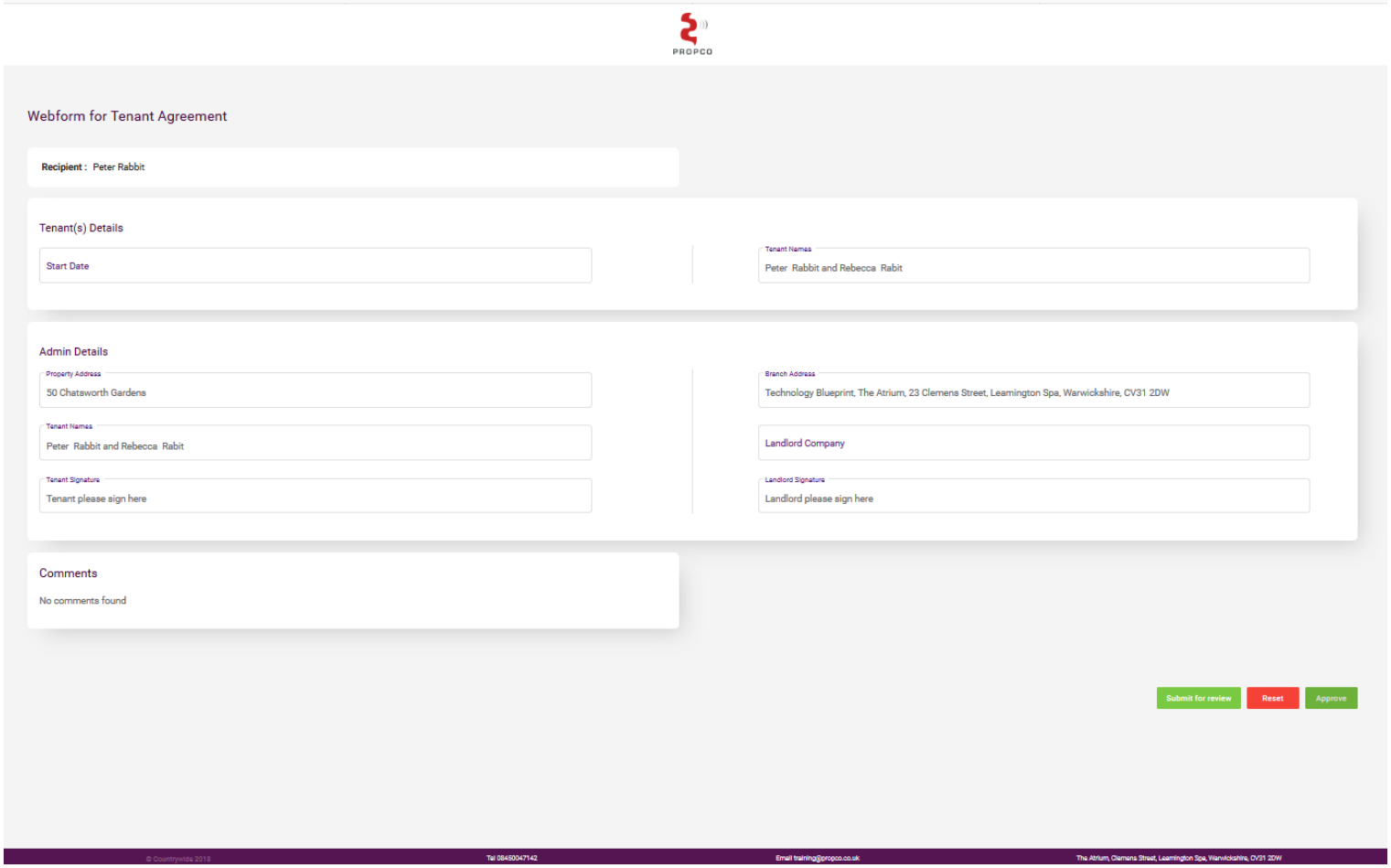
Link to Negotiation form:

Webform Link

The content of the email and format can be modified as required by TBL.

L1 Recipient/Sender's Options

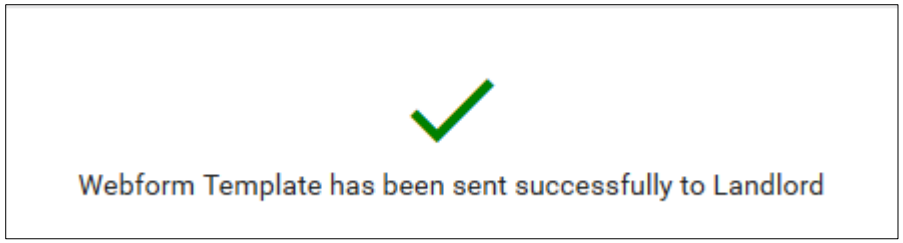
The L1 Recipient clicks the link and is taken to the web form – example below. They can either send the form to the L2 Recipient for review OR approve the form without sending it to the Recipient.



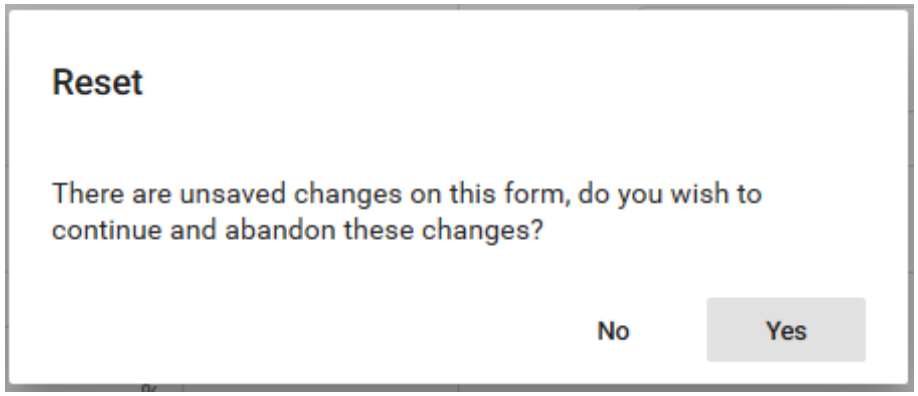
L1 Recipient/Sender's Options

Note the options available to Sender are:

Submit for review



Reset



Approve

See 'Approval Process'

Issuing the Webform

(to L2 Recipient)

When the L1 Recipient/Sender clicks ‘Submit for Review’, the L2 Recipient receives the form via email;

From Tbl Support <noreply@propco.co.uk>
Subject **Weblink for "Landlord Agreement" RE: 50 Chatsworth Gardens, Sydenham, , , Leamington Spa**
To Me <manish@propco.co.uk>

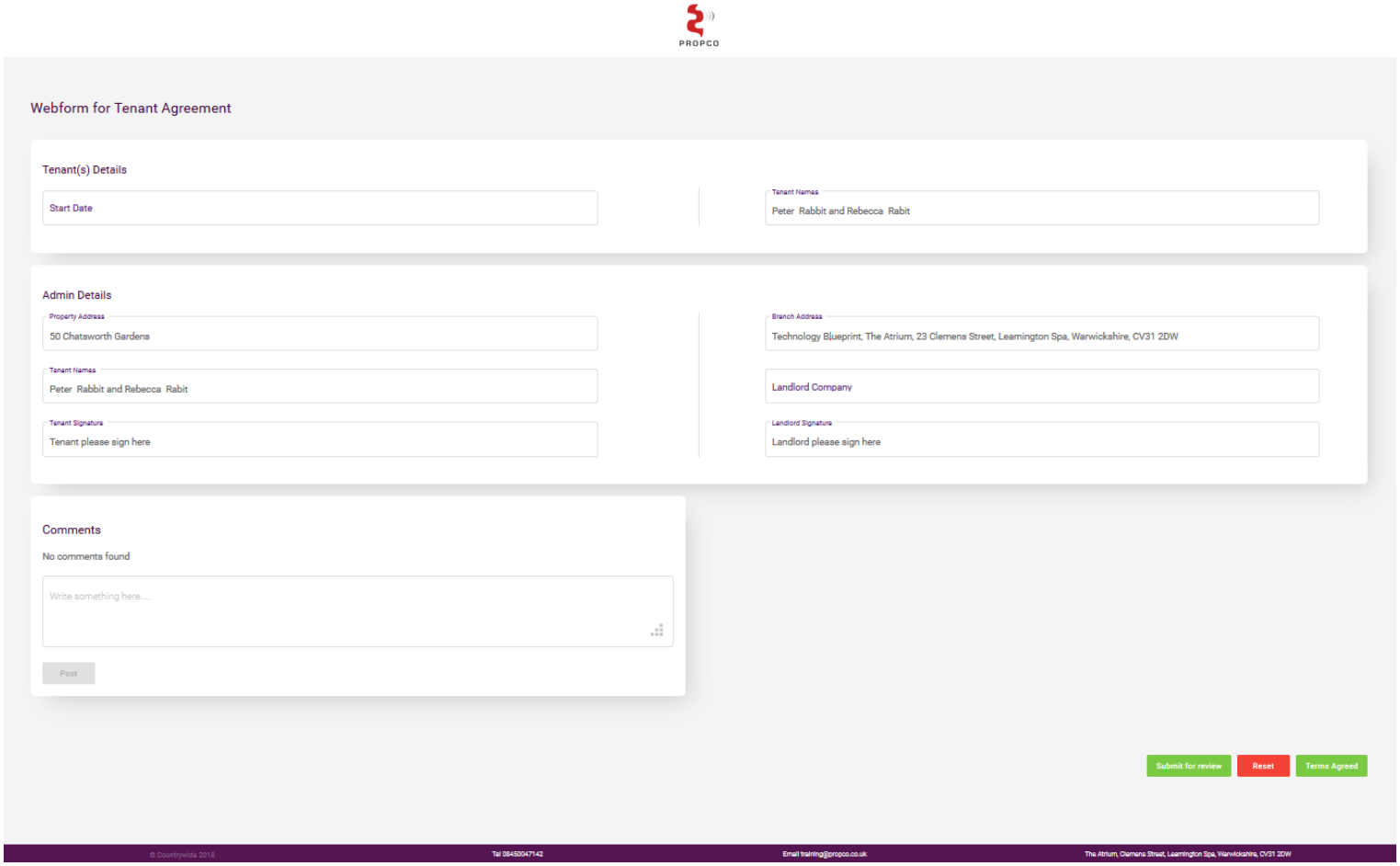
Dear Mr Another Landlord

As per the recent communication, you have received the below link from Demo Live for your consideration . Please click the link and take further action :
Webform Link

The content of the email and format can be modified as required by TBL.

L2 Recipient’s Options

The L2 Recipient receives the form via email and they can either edit it and submit it back to the L1 Recipient OR hit ‘Terms Agreed’ which indicates they are happy to proceed.

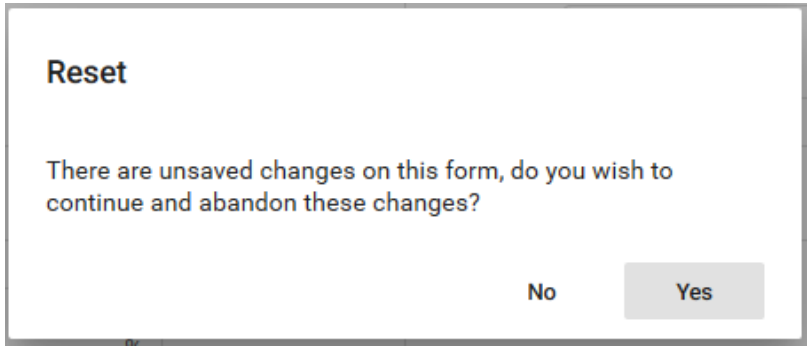


L2 Recipient's Options

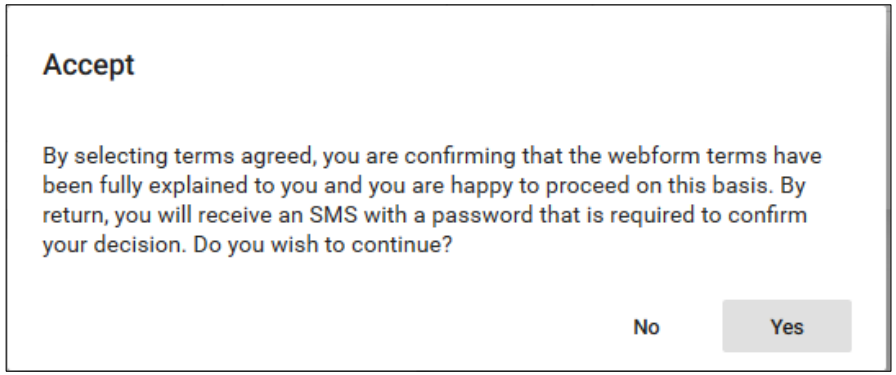
Note the options available to L2 Recipient are:

Submit for review

Reset



Terms Agreed



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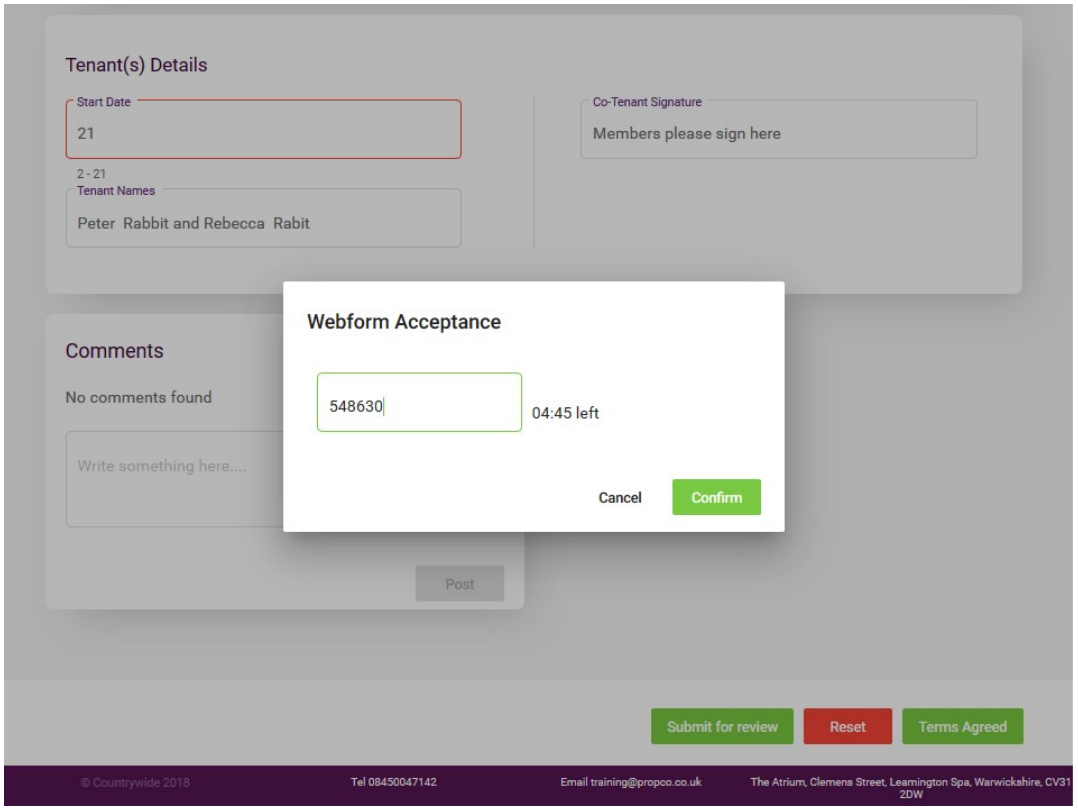
L2 Recipient's Options

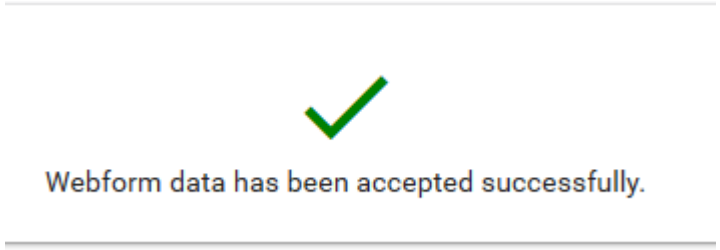
Terms Agreed

- Webform Acceptance

The L2 Recipient is asked to enter a One-Time-Password (OTP) sent to the registered Mobile number in order to accept the form.

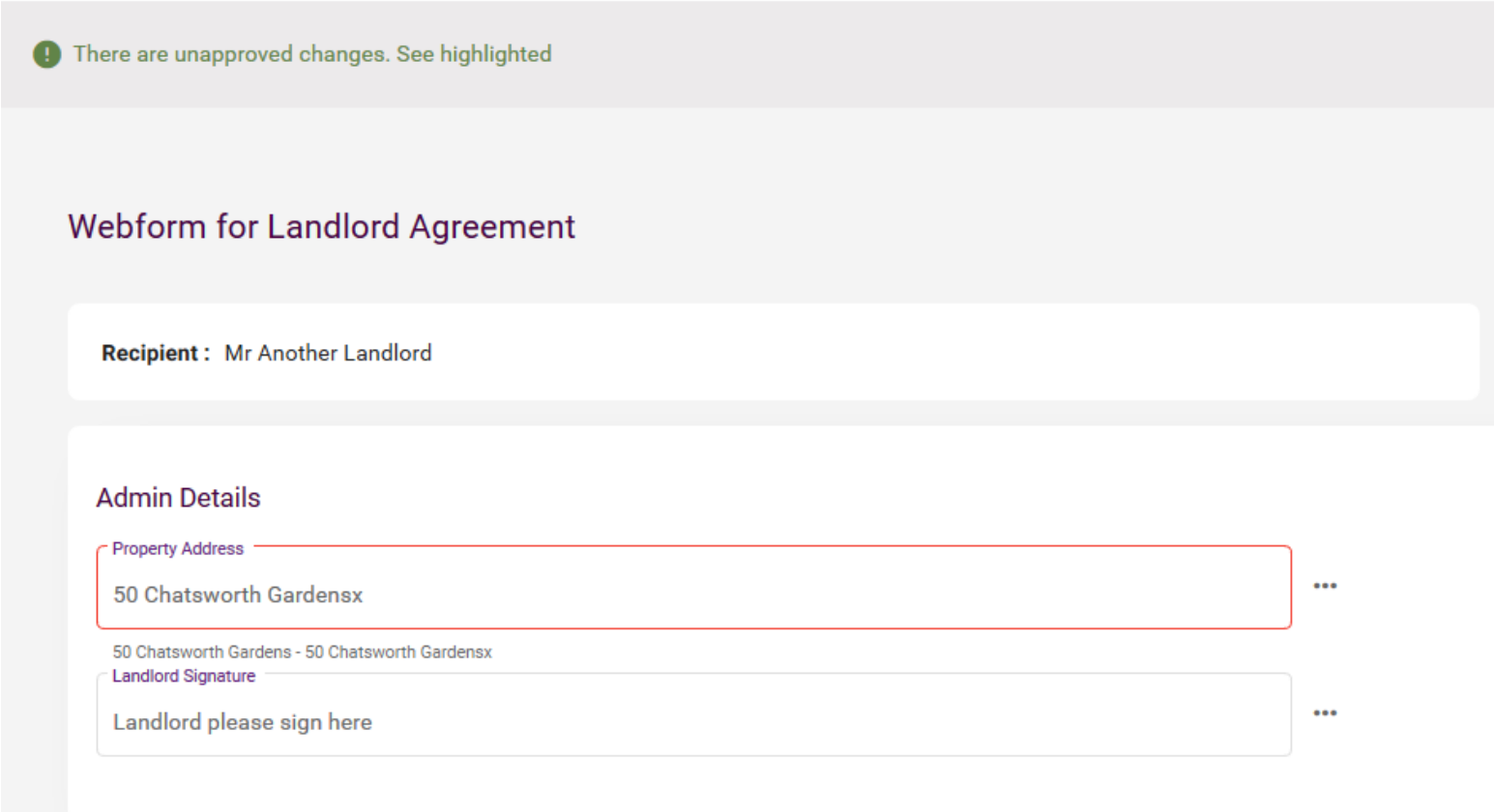


Once accepted the following message is shown:



Unapproved changes

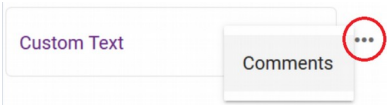
Each time one party makes a change in the form, the changes are highlighted to the other party as shown below:



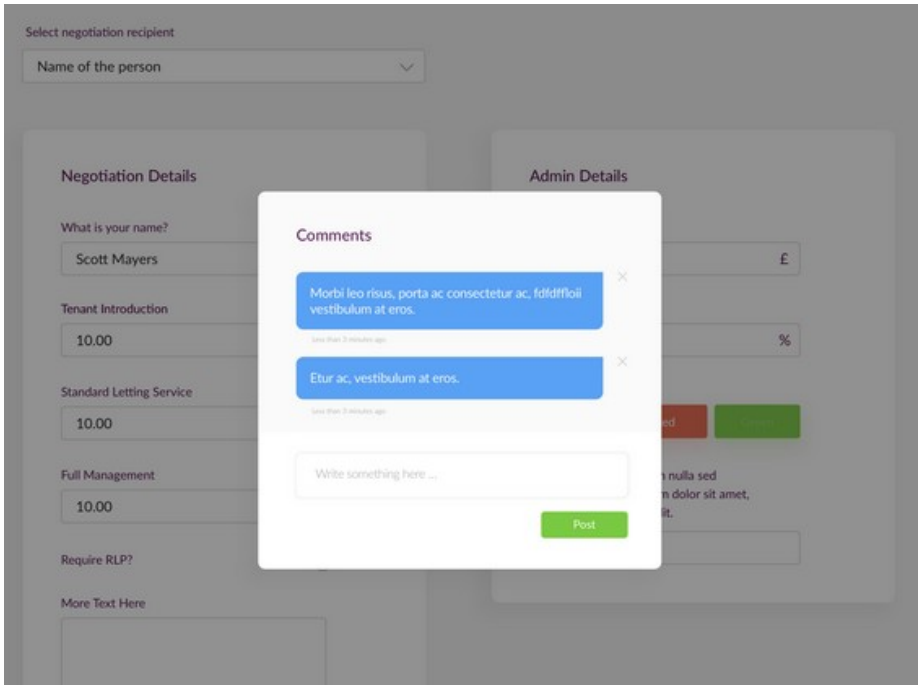
These changes must be approved by the other party by using the Submit for Review option or by clicking Accept (if sender is approving) or Terms Agreed (if recipient is approving)

Comments

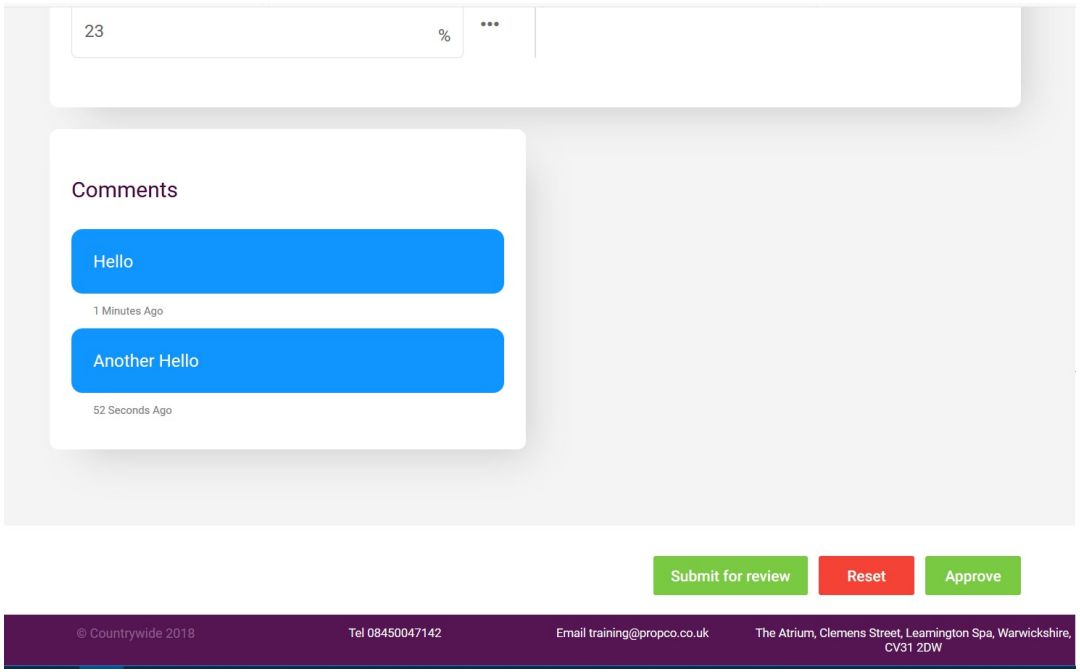
Two types of comments can be added to the webform – field level comments that a sender can add and are for internal use (recipients don't see them). These can be added by clicking on the 3 dots next to a field.



Field-Level Comments



Page-Level Comments



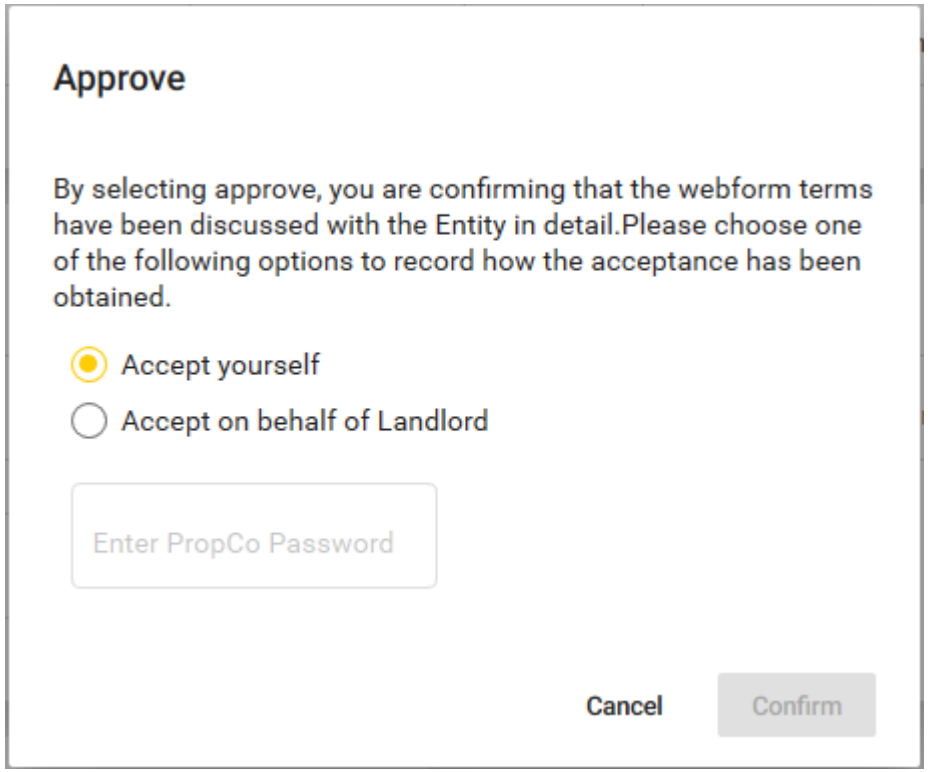
Field-level comments can be enabled or disabled through the template-level setting (Allow field level comments)
Recipient can add use the (Page-Level) Comments box to add a message for the sender as shown in the example above.

Approval Process

Approval is the final step in the process where the Sender finalises the form and the data from the form is transferred to the fields within PropCo from where it can then be used in any process.

Approve

- Accept yourself



This option can be used where there is no need to send the form to the L2 Recipient and the Sender wants to fill in and/or approve the form on Recipient's behalf. The Recipient may not have access to a device where they can access the form or are unable/partially able to fill it in themselves.

The L1 Recipient must fill in their PropCo password in order to Accept the form in this case.

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Approval Process

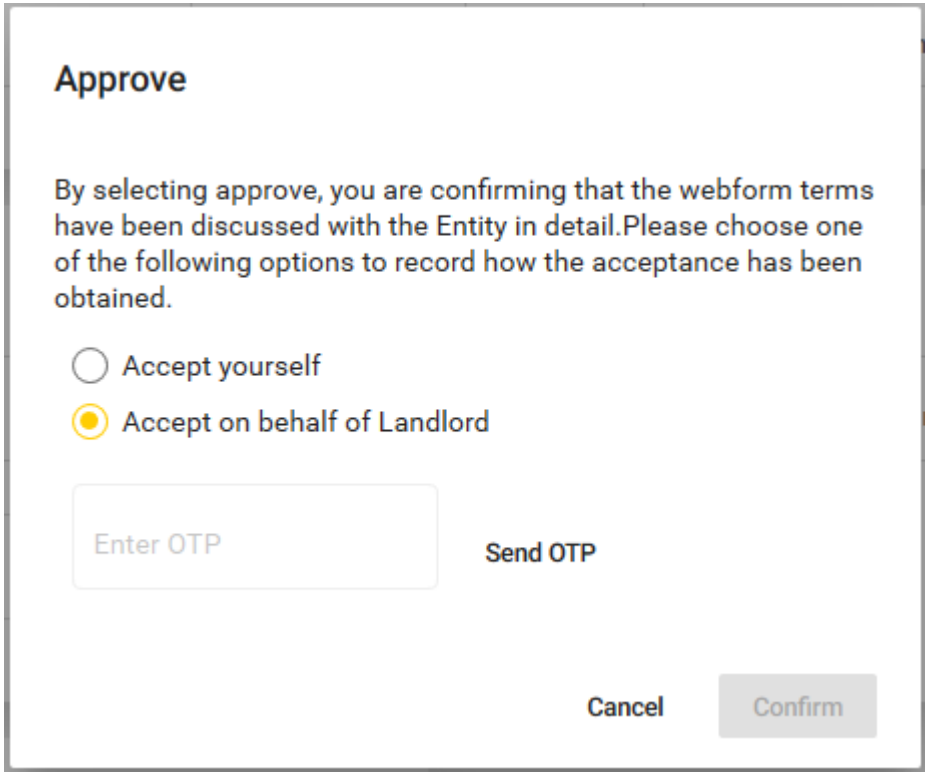
Approve

- Accept on behalf of Landlord

Alternatively, the Sender can accept on behalf of the Recipient but for added security they can send a One Time Password (OTP) to them which they will need to give to the Sender over the phone immediately. The password is valid for 5 minutes at a time. If it expires then the Sender can simply send another one.

Once accepted the following message is shown:

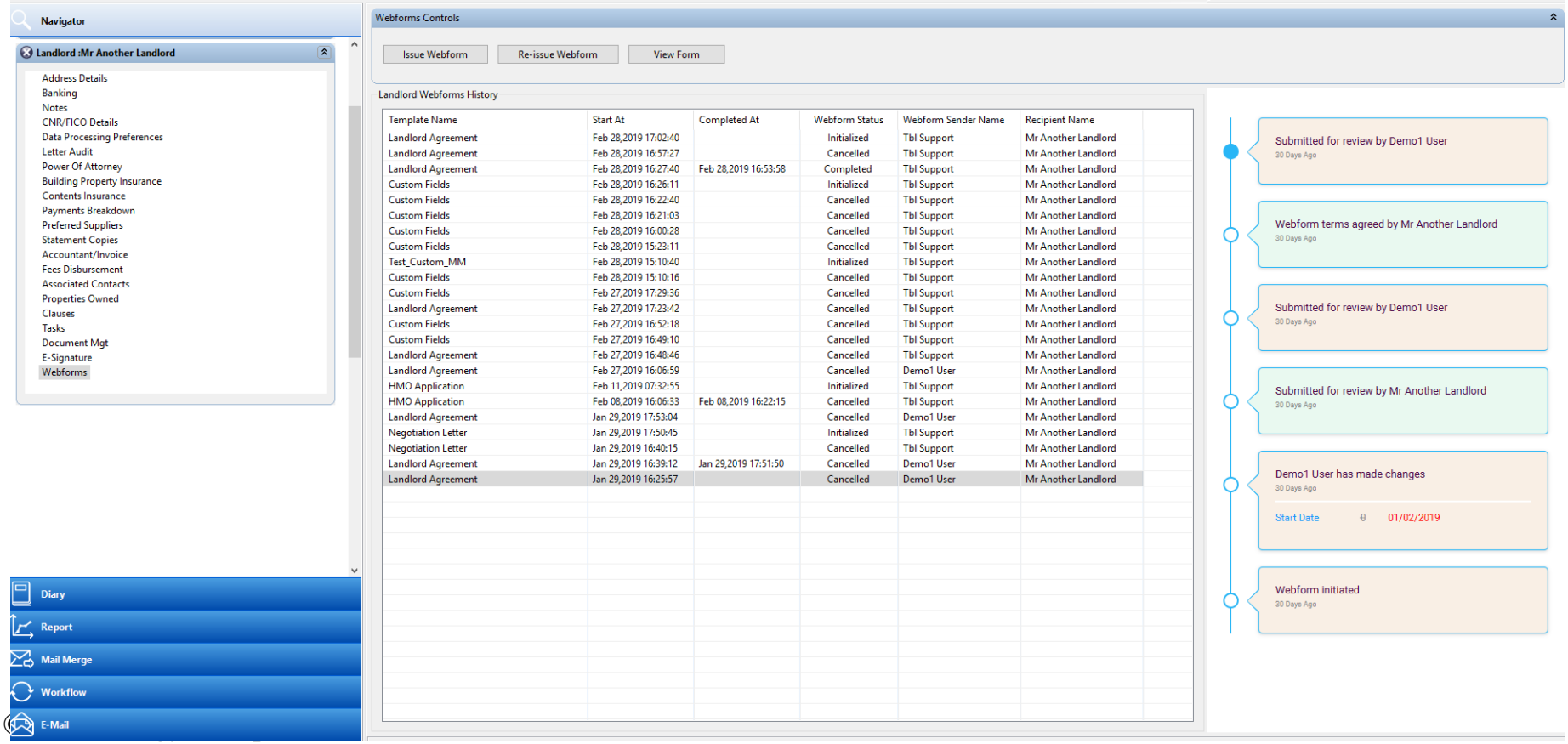
Webform data has been accepted successfully.



Audit Timeline

A timeline of events is automatically created and visible from the Webforms screen in the Landlord / Tenant record on PropCo. Select the Webform entry in the table on the left and the timeline is displayed on the right. Each Webform has a status which indicated where we are at with the process.

E.g: Initialised, Awaiting Response-Sender, Awaiting Response-Recipient, Completed, Cancelled

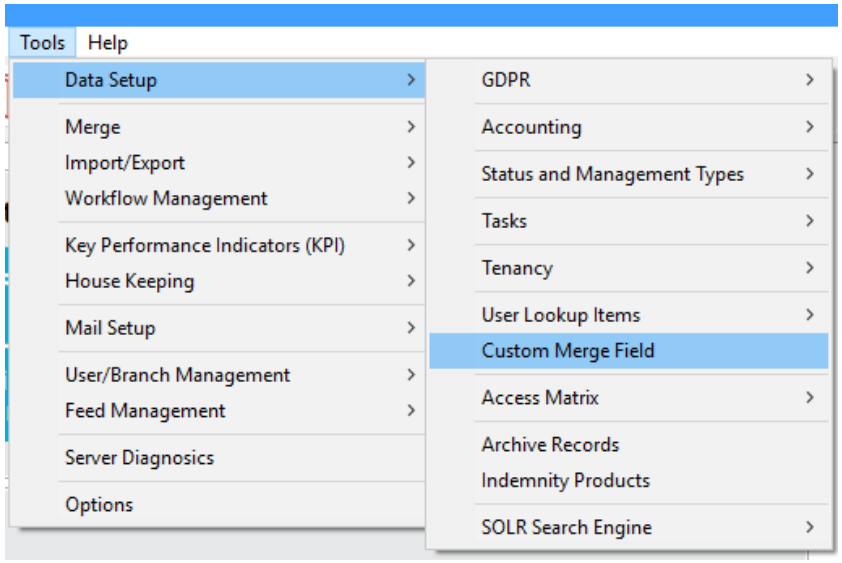


Template Name	Start At	Completed At	Webform Status	Webform Sender Name	Recipient Name
Landlord Agreement	Feb 28,2019 17:02:40		Initialized	Tbl Support	Mr Another Landlord
Landlord Agreement	Feb 28,2019 16:57:27		Cancelled	Tbl Support	Mr Another Landlord
Landlord Agreement	Feb 28,2019 16:27:40	Feb 28,2019 16:53:58	Completed	Tbl Support	Mr Another Landlord
Custom Fields	Feb 28,2019 16:26:11		Initialized	Tbl Support	Mr Another Landlord
Custom Fields	Feb 28,2019 16:22:40		Cancelled	Tbl Support	Mr Another Landlord
Custom Fields	Feb 28,2019 16:21:03		Cancelled	Tbl Support	Mr Another Landlord
Custom Fields	Feb 28,2019 16:00:28		Cancelled	Tbl Support	Mr Another Landlord
Custom Fields	Feb 28,2019 15:23:11		Cancelled	Tbl Support	Mr Another Landlord
Test_Custom_MM	Feb 28,2019 15:10:40		Initialized	Tbl Support	Mr Another Landlord
Custom Fields	Feb 28,2019 15:10:16		Cancelled	Tbl Support	Mr Another Landlord
Custom Fields	Feb 27,2019 17:29:36		Cancelled	Tbl Support	Mr Another Landlord
Landlord Agreement	Feb 27,2019 17:23:42		Cancelled	Tbl Support	Mr Another Landlord
Custom Fields	Feb 27,2019 16:52:18		Cancelled	Tbl Support	Mr Another Landlord
Custom Fields	Feb 27,2019 16:49:10		Cancelled	Tbl Support	Mr Another Landlord
Landlord Agreement	Feb 27,2019 16:48:46		Cancelled	Tbl Support	Mr Another Landlord
Landlord Agreement	Feb 27,2019 16:06:59		Cancelled	Demo1 User	Mr Another Landlord
HMO Application	Feb 11,2019 07:32:55		Initialized	Tbl Support	Mr Another Landlord
HMO Application	Feb 08,2019 16:06:33	Feb 08,2019 16:22:15	Cancelled	Tbl Support	Mr Another Landlord
Landlord Agreement	Jan 29,2019 17:53:04		Cancelled	Demo1 User	Mr Another Landlord
Negotiation Letter	Jan 29,2019 17:50:45		Initialized	Tbl Support	Mr Another Landlord
Negotiation Letter	Jan 29,2019 16:40:15		Cancelled	Tbl Support	Mr Another Landlord
Landlord Agreement	Jan 29,2019 16:39:12	Jan 29,2019 17:51:50	Cancelled	Demo1 User	Mr Another Landlord
Landlord Agreement	Jan 29,2019 16:25:57		Cancelled	Demo1 User	Mr Another Landlord

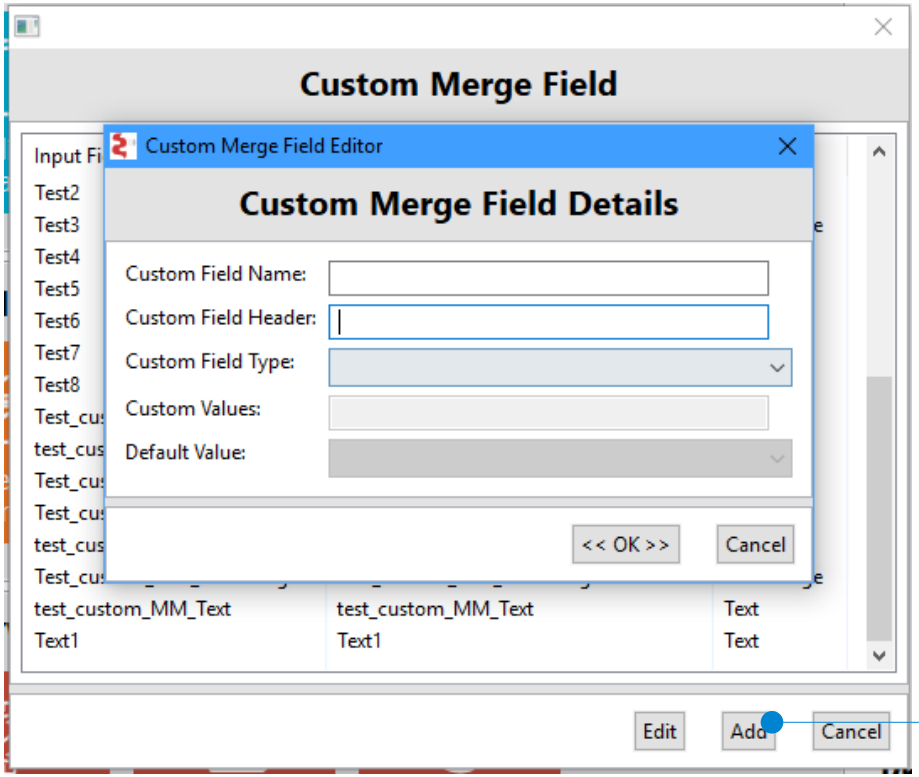
Custom Fields

The existing feature for creating Custom Merge Fields has been enhanced in this release. These fields can be added to the Mail Merge templates and in turn therefore be used on the Web Form. This has a significant advantage in that it allows you to capture data that is traditionally not stored in PropCo and wouldn't be currently possible without code change. Custom Fields can also be used to capture data from the Recipient and presented on Mail Merge documents that are signed electronically.

These additional data fields can be in the form of free text, amount, checkbox, radio buttons, percentage figures and drop-down options.



Custom Fields



Custom Field Name: How the field is identified

Custom Field Header: Field name for custom field as displayed in the mail merge document.

Custom Field Type:

- Text
- Numeric
- Combobox
- Percentage
- Currency
- Radio
- Combo
- Checkbox
- Input

Custom Values: For specifying values used with Radio buttons and Combo (drop-down). Simply, type in the values separated by comma. e.g. Yes, No, Not sure

Default Values: For specifying the default value from one of the list of Custom Values.

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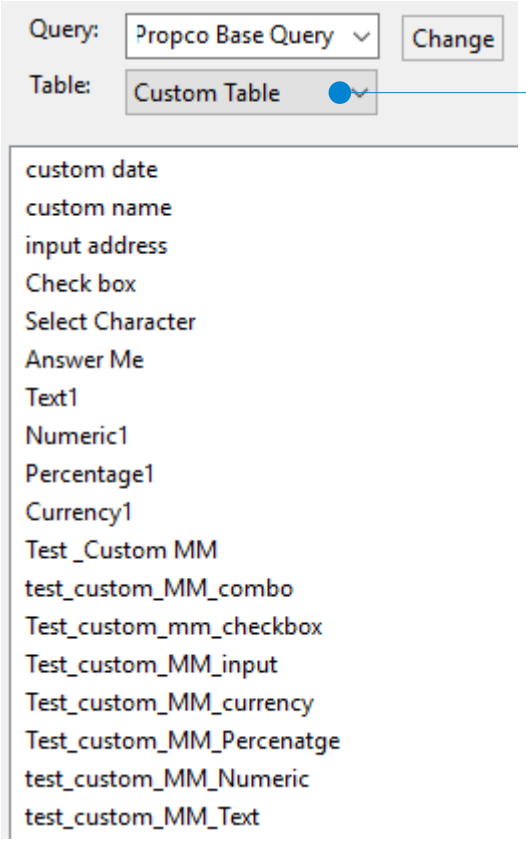
Custom Fields

Adding Custom Fields to Letter Templates:



To use a custom field in a letter template, edit the letter;

Then, select Custom Table;

All of the Custom Fields created as described in the previous slide will be displayed here;

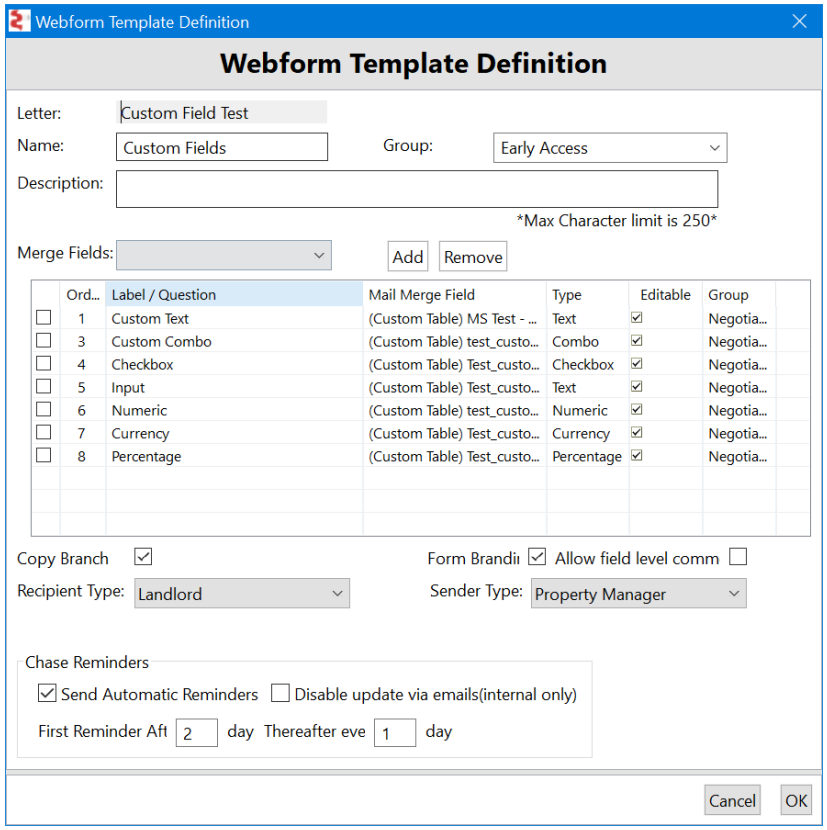
Add the field(s) to the letter template as desired.

Click Save/Close.

Custom Fields

Adding Custom Fields to Webform Template:

Open a Webform Template, select the Custom Field from the Merge Field drop down and then click Add



NB: Type will default to the type of Custom Field automatically

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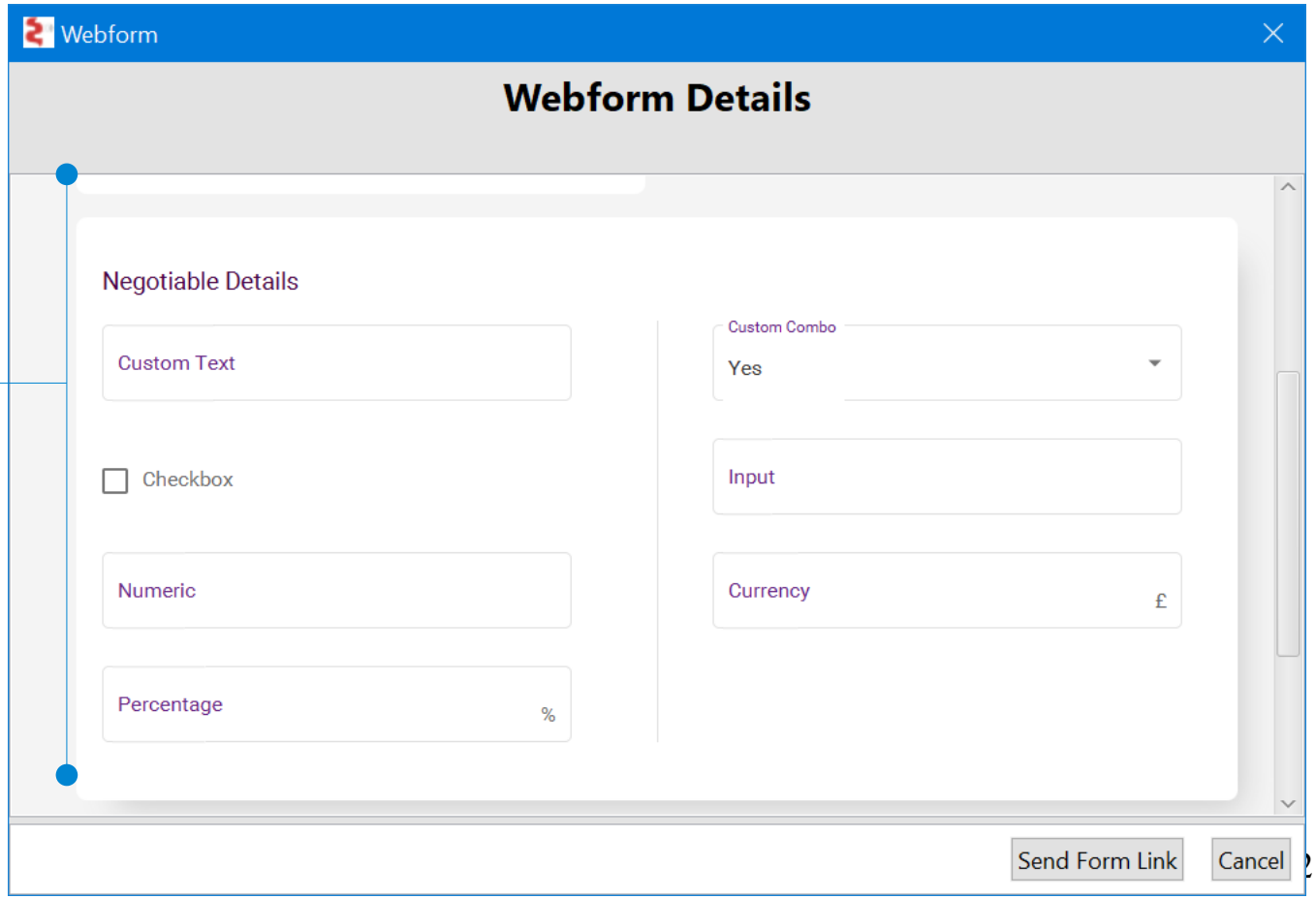
Custom Fields

Custom Fields on the Web Form

Custom Fields are displayed on the Web Form alongside any other merge fields in the system. Examples shown below.

Custom Fields



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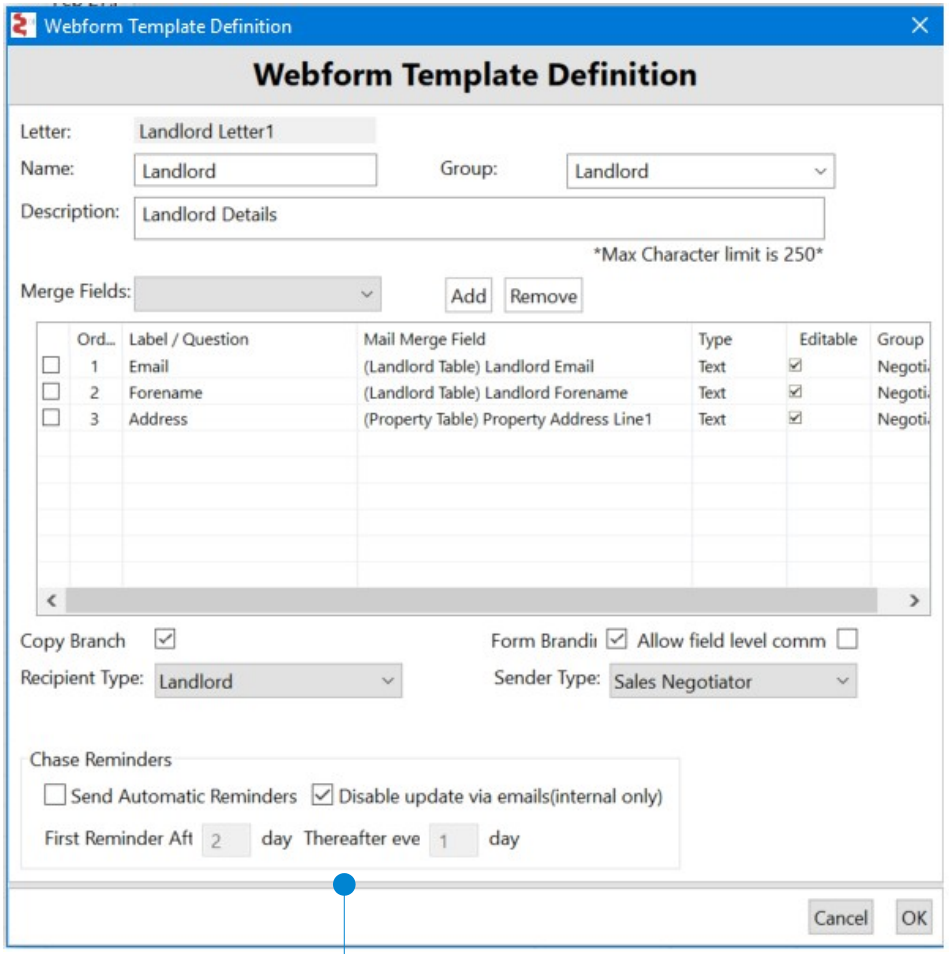
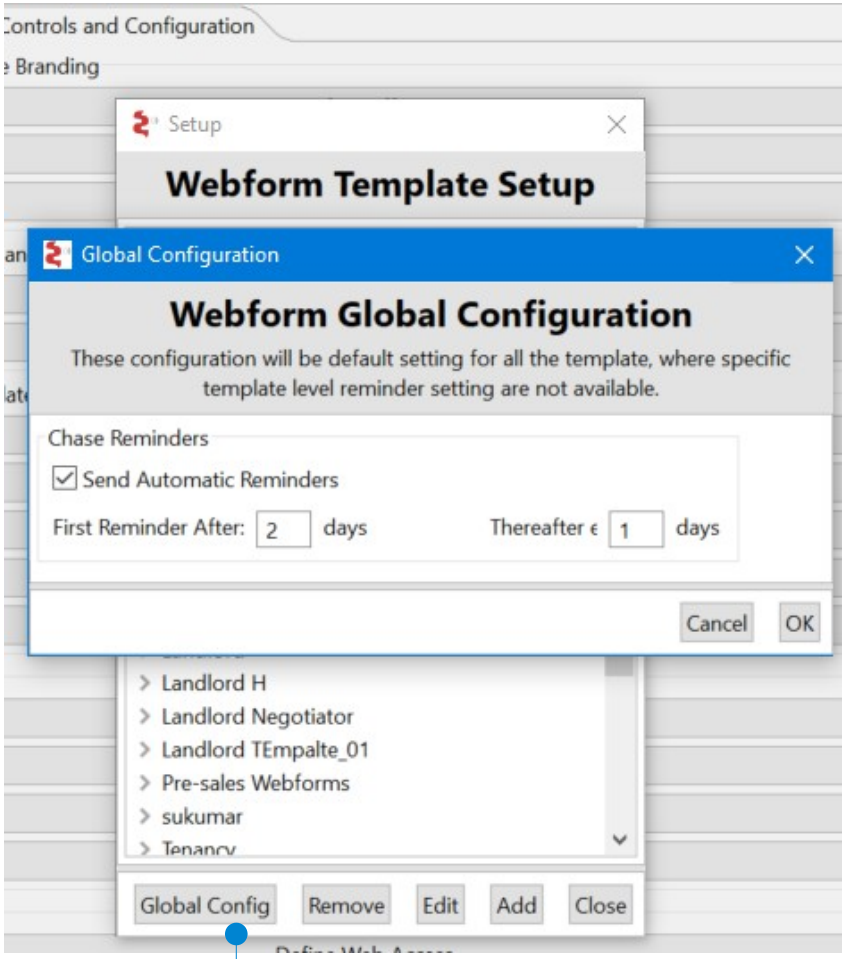
Automated reminders

Reminders can be configured at the Template Level as shown below



New Options to send a reminder to the Recipient if there is an action pending from them, or they have not Accepted the Webforms

Automated reminders



Webform Reminders can be configured globally for ALL Webform templates. These are used where template-specific reminders are not available.

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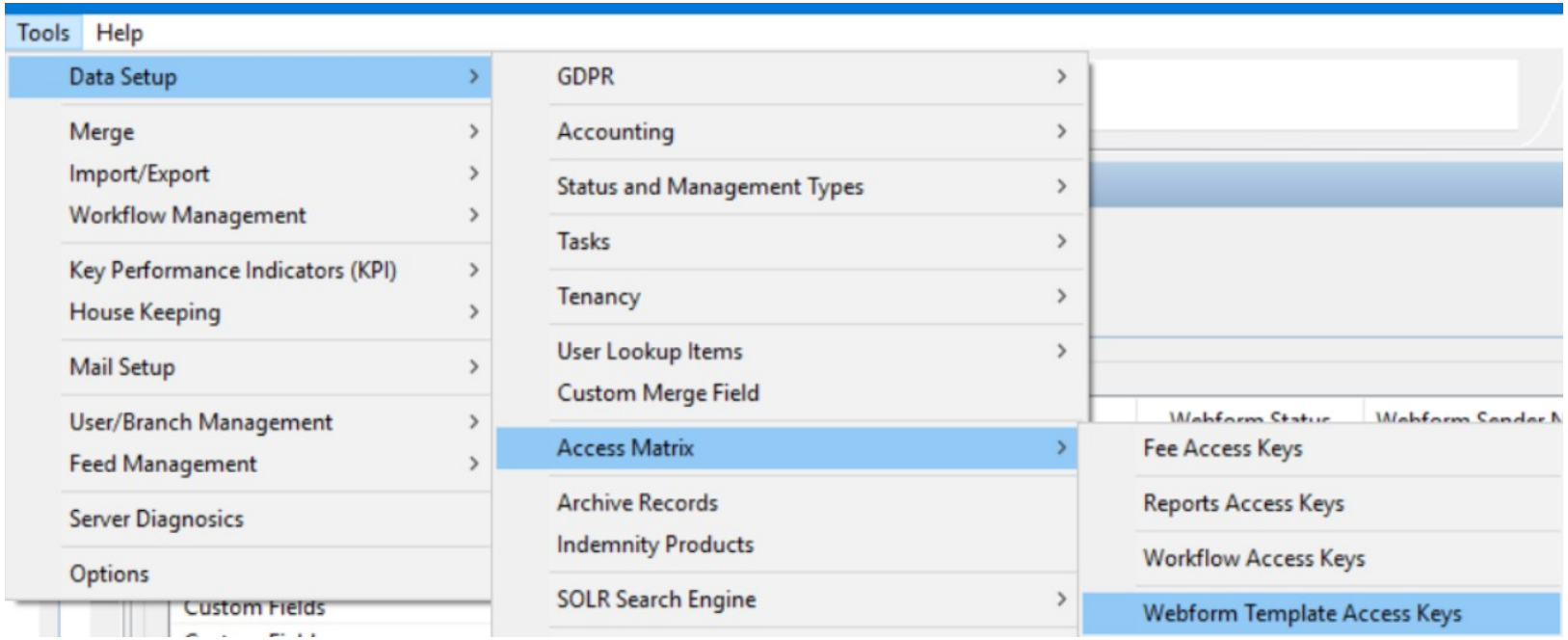
Access Control

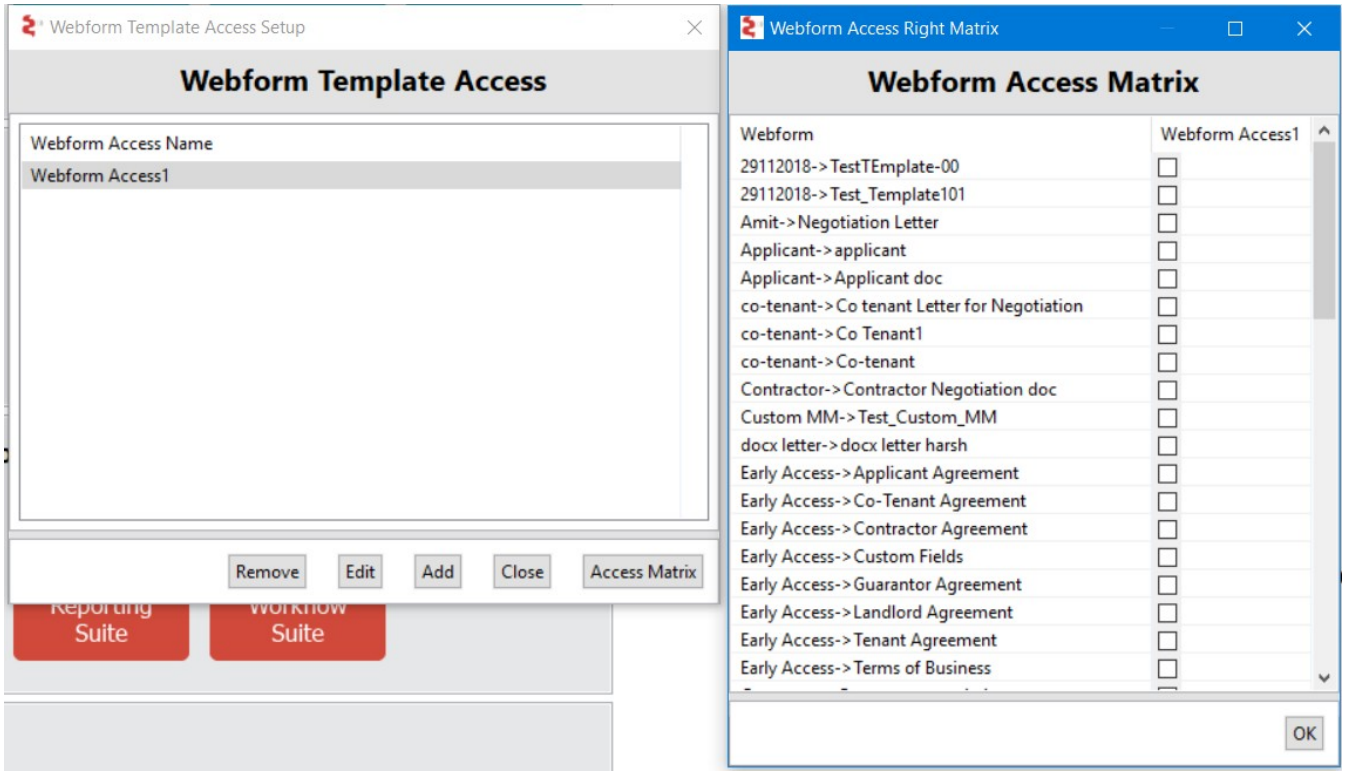
Access to Webform Templates can be controlled using the Access Matrix similar to how we control access to Letters, Reports & Workflows.

Browse to the location shown below;



Access Control

Create a new Access Key by clicking Add;
Select the newly created key and click Access Matrix;
Then, tick the templates you want to include in the access key.



The Access Key then needs to be assigned to the user via User Admin so they can see the templates.

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E-Signature Enhancements

Letter Details (#5284)

Letter Properties

Select Letter Type
- Is a standard letter
- Is an agreement letter
- Is utility letter

Details
- Letter Name: ESign_AST_FMng_Rent_Coll (Landlords
- Letter Filters
- Category: ESignature,Tenancy Agreements
- Description:
- Type: Microsoft Word (.doc)

E-Signature Signer Config
- Contractor Signer Scale
- Tenant Signer Scale
- Landlord Signer Scale
- Applicant Signer Scale
- Guarantor Signer Scale
- Co-Tenant Signer Scale

Options
- Is a template Letter
- Restrict Access
- Audit Letter
- Auto Delete Tag
- Audit Rename
- Upload via DocuSign
- Allow Sign Offline

Recipient
- Tenant
- Applicant
- Landlord
- Contractor

E-Signature Target
- Landlord
- Tenant
- Co-Tenant
- Applicant
- Guarantor
- Contractor

Esign Document Type
- None

IMail Target
- Landlord
- Tenant
- Co-Tenant
- Applicant
- Guarantor
- Contractor

Utility Settings
- Auto Print for utility during agreement creation
- Council Ref:
- Electricity:
- Gas Ref:
- Water Ref:

E-Sign Reminders
- Send Automatic Reminders
- First Reminder After: days Thereafter every: days

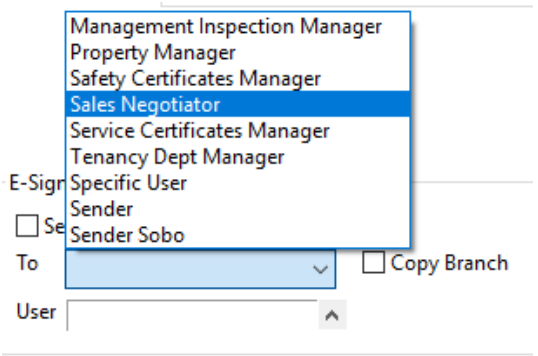
E-Sign Notifications
- Send Notifications
- To
- Copy Branch
- User

New option to allow the recipient to sign a DocuSign letter with a “wet” signature

Copy Branch: Send a copy of the envelop notification to the Branch

New options to set reminders for e-signature envelopes

New options to notify within the agency whenever the E-sign envelope status changes. See available options on the right:



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