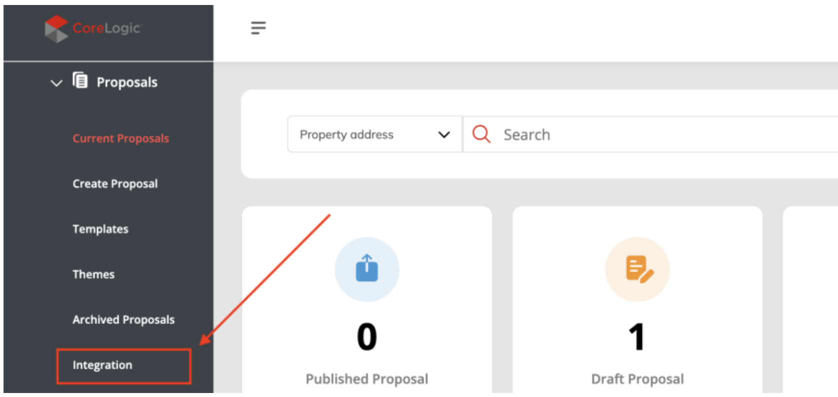
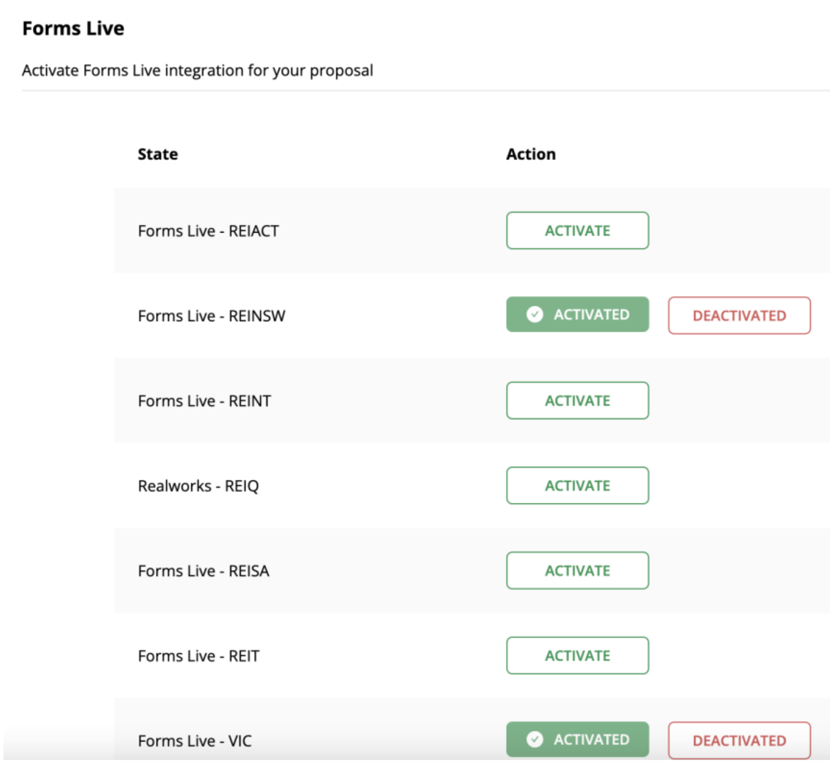
Steps to activate Forms Live from RP Proposals

1. The first step is for the user to log into RP Proposals. The user is initially taken to the current proposal page. From the left-hand panel of the Dashboard, the user can navigate to the 'Integration' page from where they will be able to activate the integration.



2. From the integration page, the user will find the option to activate their Forms Live integration for different states.



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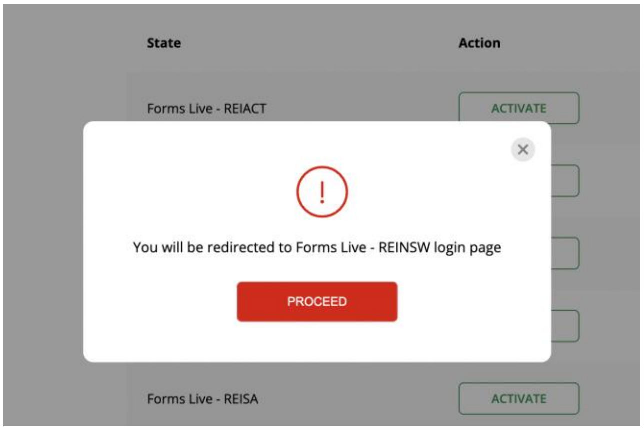
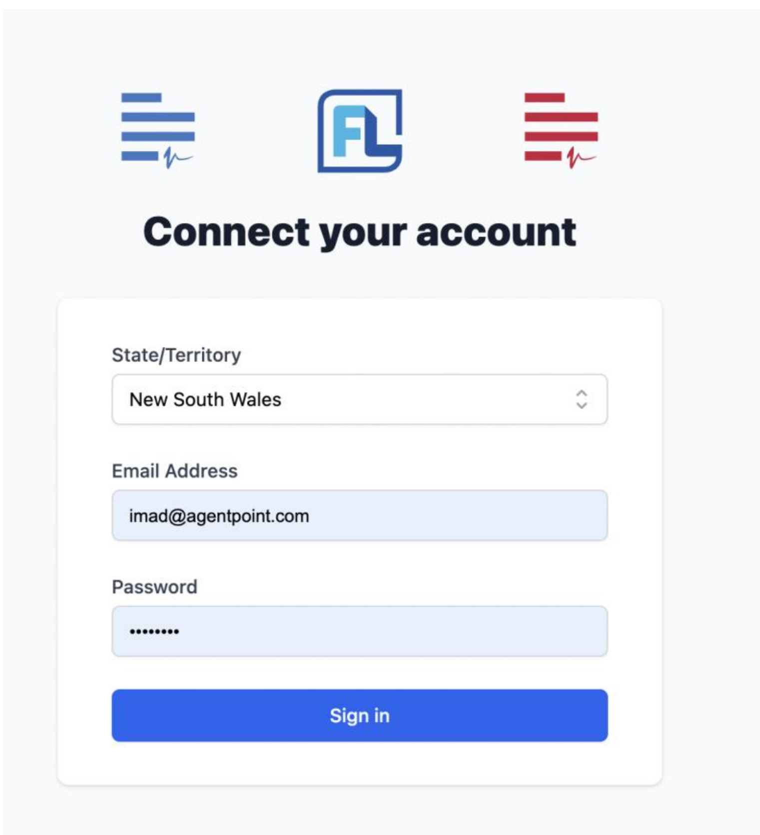
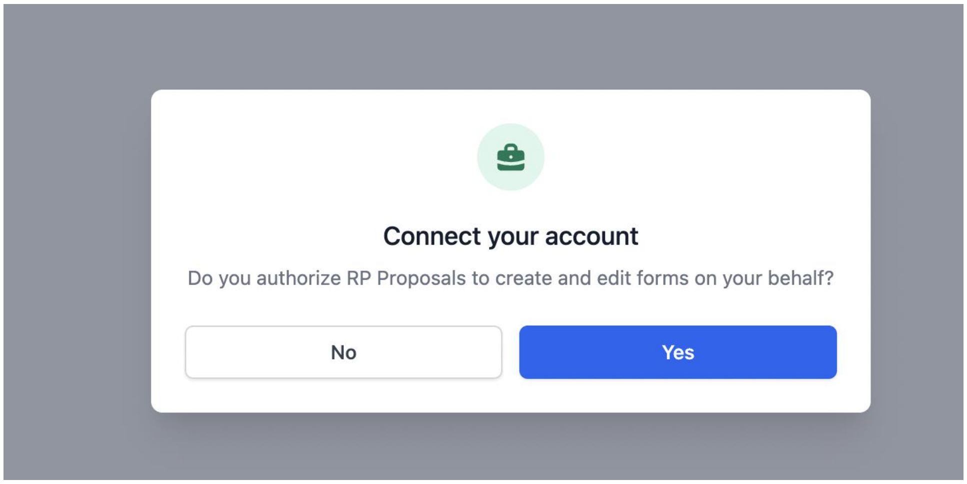
3. The User can click on the ‘Activate’ button for any specific state to activate the integration. It will then show a message to confirm to proceed



4. After clicking the proceed button, the user will be redirected to Forms Live authentication page and will need to input the credentials to connect the account



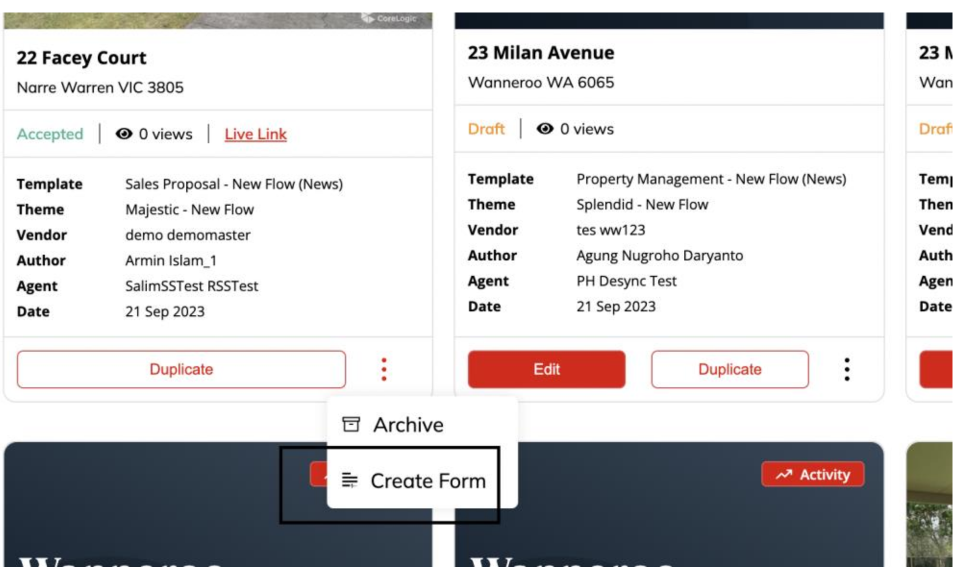
5. Once the credentials are entered, the user is prompted with a confirmation message



Once user's account is connected, the user will be redirected on the integration page of RP Proposals and will see the selected state as activated

Steps to create Forms in RP Proposals

6. From the left sidebar, the user can navigate to the 'Current Proposals' page. On this page the user will be able to view all the proposal cards in a tile view. For proposals with the status of **'Accepted' or 'Published'**, the user will be able to create a form by clicking on the 3-dot option on the proposal tile and selecting the 'Create Form' option.



7. In the create form window, the user will find **Account, Action, Template, Form Name, Type** which represents:

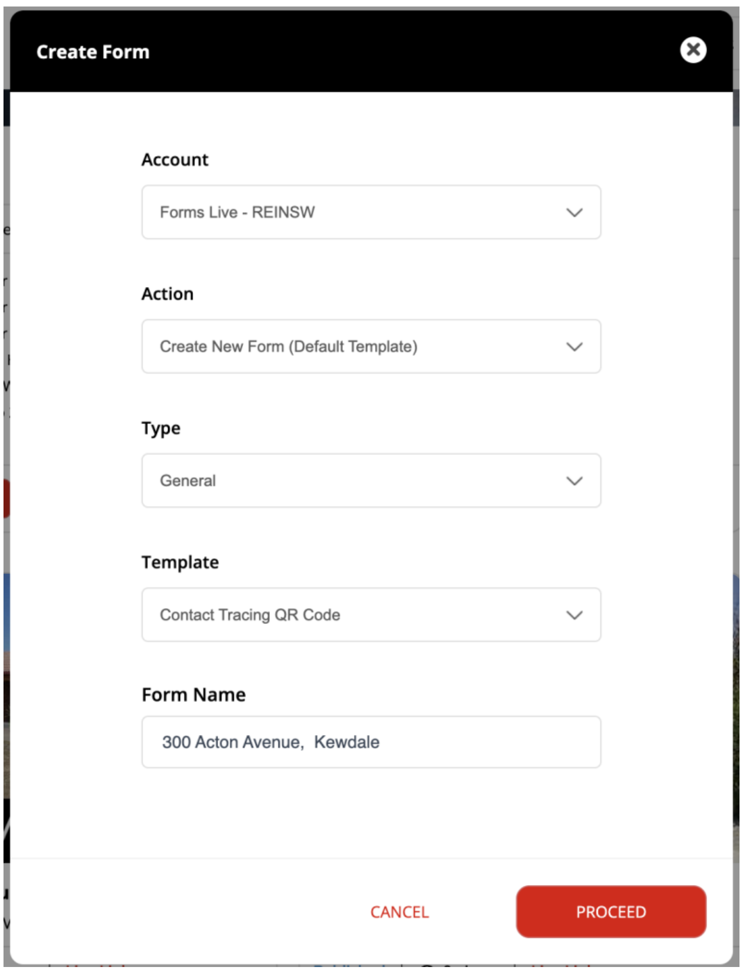
   Account: The state Account

   Action: Create new form - default template, custom template, view existing forms

   Type: Type of forms

   Template: Type of templates

   Form name: The Form name



8. Once all the fields are selected or populated, the user can then click on the ‘Proceed’ button that will redirect them to the Forms Live platform with prepopulating information from the proposal such as: Property address, Vendor name, Agent name

9. Users can come back to RP Proposals, and select an existing form created previously to modify that form with two options if needed: **Edit form**, **Re-merge and edit form(overwrite)**