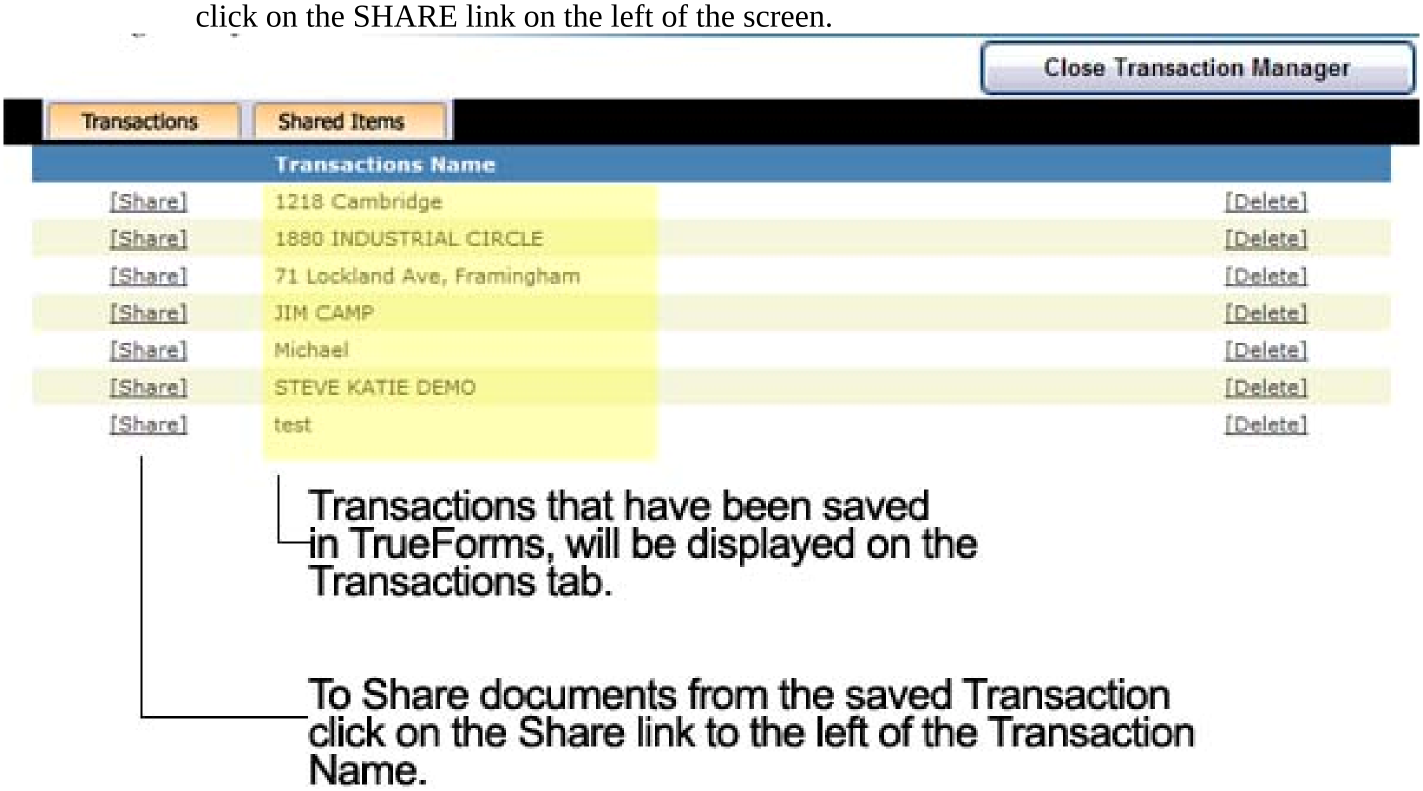
What is TrueFormShare™?
TrueFormShare is a separate module of the TrueForms Online program that allows non TrueForms users to collaborate or share a document that you, as a user, have created in the TrueForms Online program. You may give an outside party the rights to view or even edit (those areas that are editable) a form or contract that you have filled in and prepared in TrueForms.

Is TrueFormShare available to all TrueForms users?
TrueFormShare is a separate module that Is enabled in your TrueForms Online account after you purchase it. (TrueFormShare is included in certain organization platforms.)

How do I get into TrueFormShare?
Login to your TrueForms Online account as you normally would. After logging in your will see a button on the right hand side of your TrueForms console that says TRANSACTIONS. If you click on the Transactions button you will enter the TrueForms Document Manager -this is TrueFormShare.

How do I share a transaction with TrueFormShare?
Sharing documents with TrueFormShare is simple. You may invite an outside user (someone who does not have access to TrueForms) into a document by “sharing” the form or contract with them.

1) TRUEFORMSHARE DOCUMENTS
    a. Login to TrueForms Online
    b. Click on the TRANSACTIONS button
    c. You will see all the transactions listed that you have created in your TrueForms Online account.
    d. Choose the transaction that contains the form that you want to share with outside parties and click on the SHARE link on the left of the screen.

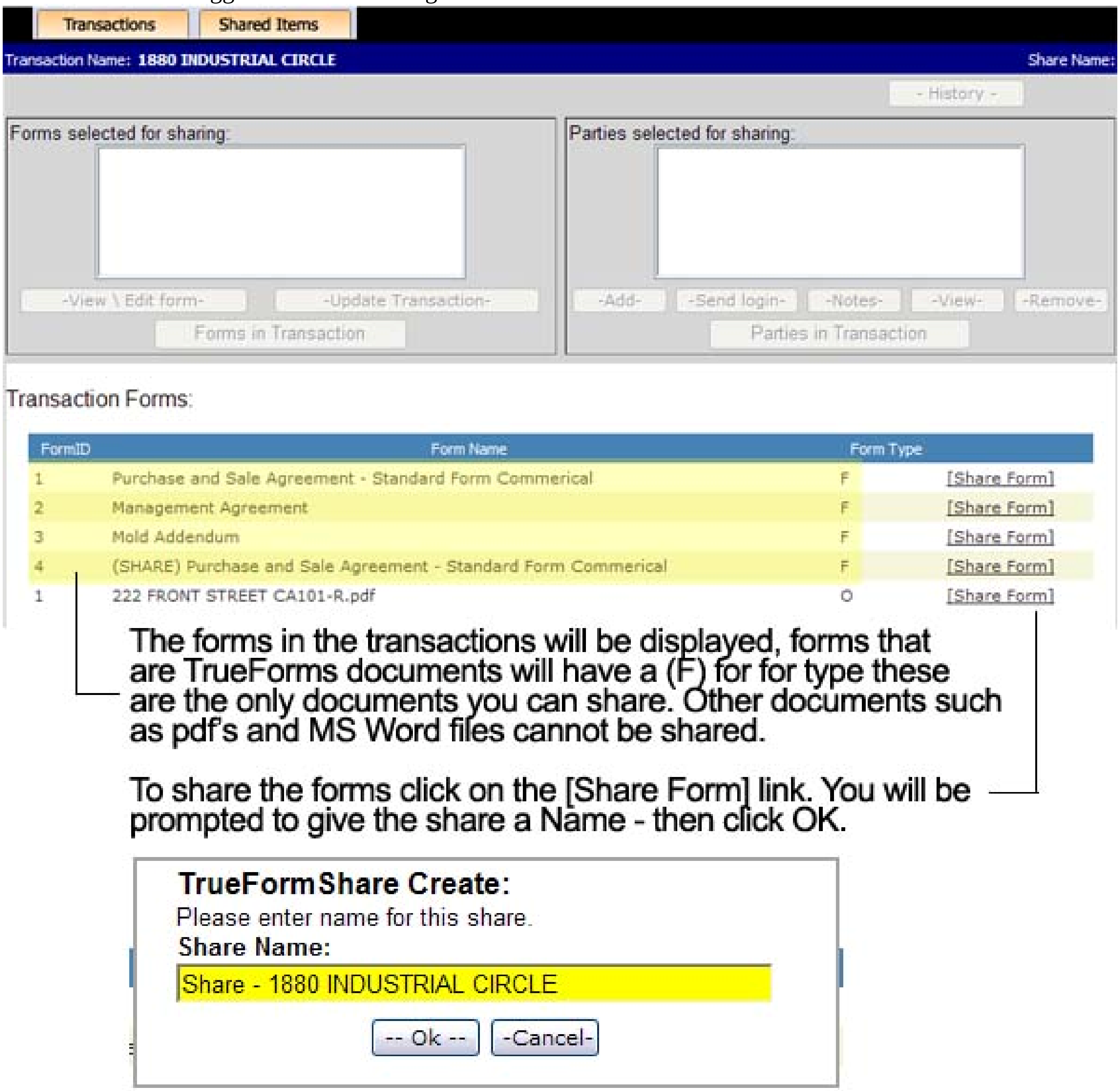


2) SELECTING A DOCUMENT TO BE SHARED

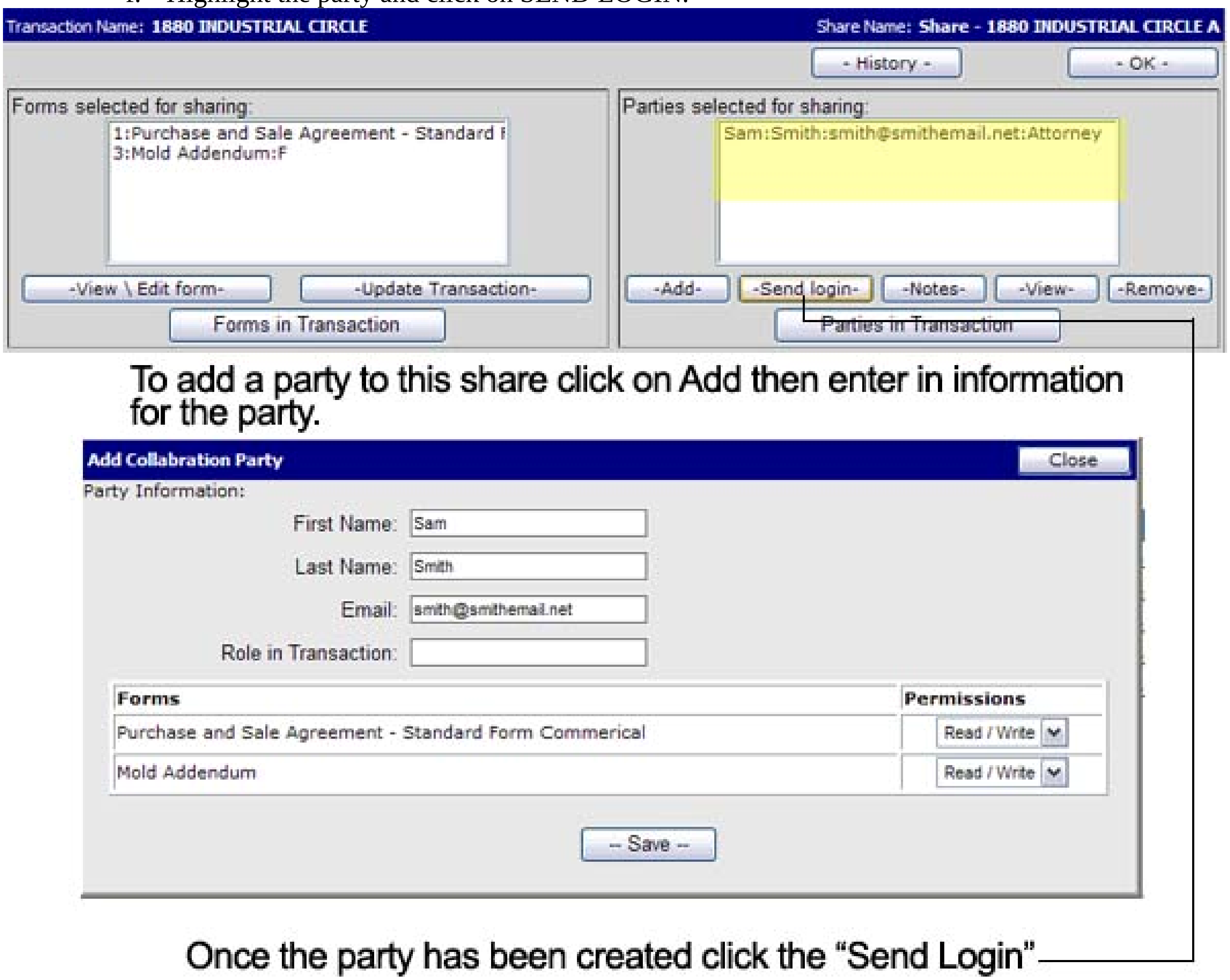
a. You will see a screen with two boxes titled: "Forms selected for sharing" and "Parties selected for sharing." Below these boxes you will see the forms that are in the transaction you selected.

b. Click on the Form you want to share and then click on the Share Form link to the right of the form title.

c. A dialog box will come up with the name of the new Shared Transaction. You may leave it with the suggested name or change the name -then click OK.



3) ADDING A PARTY AND SENDING THE SHARE INVITE
   a. The Form will show up under the Forms selected for sharing box. Click on the form to highlight (select it).
   b. Now click on the ADD button under the “Parties selected for sharing” dialogue box
   c. A box will come up with First Name, Last Name, e-mail and Role -fill these out.
   d. By default an invitee has permission to edit (read/write) the form. If you only want them to read the forms change their permissions to read only.
   e. Click on SAVE.
   f. Highlight the party and click on SEND LOGIN.



How do I know if the documents I've shared have been looked at or changed (edited)?
TrueFormShare has the ability to view HISTORY of the shared documents. Simply click on the SHARED ITEMS tab, go to the transaction and then click on VIEW. On the right hand side above the "Parties selected for sharing" box there is a HISTORY button. Click on the HISTORY button and you can see what has transpired.

How do I view/edit a shared document in a transaction?
Click on the SHARED ITEMS tab, go to the transaction and then click on VIEW. Under the "Forms selected for sharing" box you will see a button called -view \ edit form- click on that button to view changes and/or edit the shared form.

How do I update my Transaction with the info from the share?
Click on the UPDATE TRANSACTION button under the "Forms selected for sharing" box. This will move the shared item(s) back into the original transaction. Once this is done close the Transaction Manager and click on the green "Start TrueForms Online button". Open the Transaction and click on the Current Transaction tab the item(s) that were shared will be listed with a SHARE next to the form name.

Once the form(s) is back in the Transaction you can email the document in PDF format by clicking on File then send email.

What does the person I have invited to share get?
The Parties selected for sharing will receive a link to the share along with a username and password to login and access the form(s). Once logged in they will simply click on the form name, the plug-in will be installed and the form will open. The parties can make changes and save the document. Parties can also print and email the document(s) in PDF format only.