

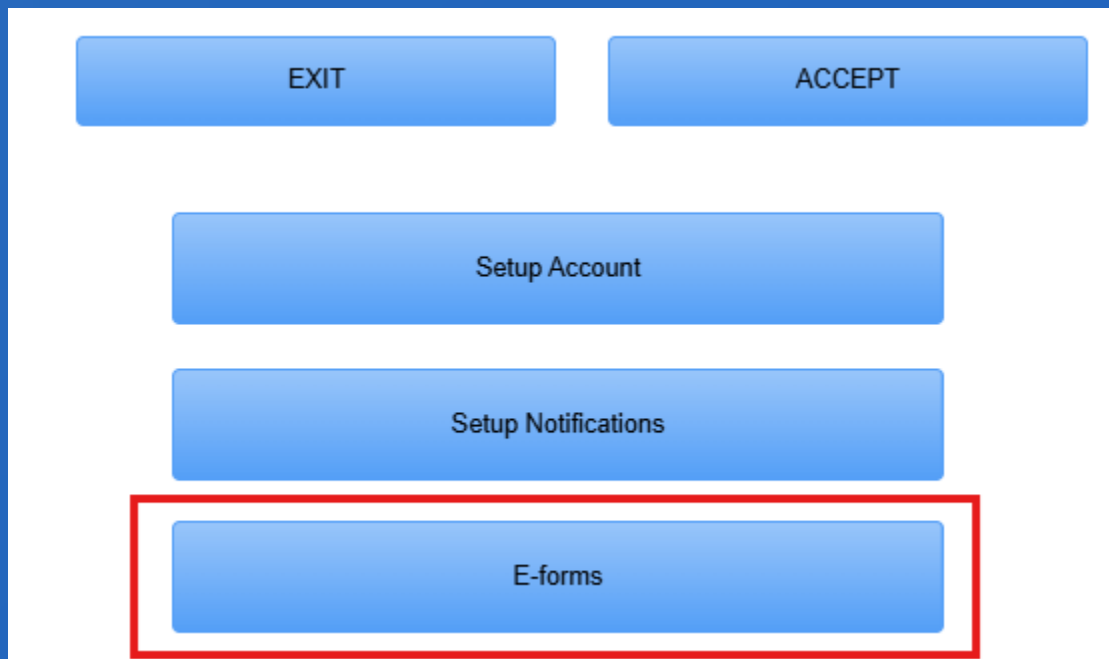
E-Forms

Below you will find the instructions on how to set up E-Forms in your Paired Plus software. While completing the setup, feel free to constantly save the E-Form so that you do not lose your progress if you need to walk away.

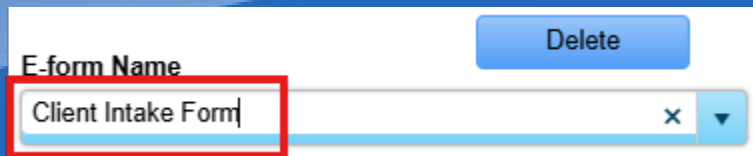
1. Click on the “DARCI” button on the right side of the home page.



2. Select the “E-Forms” button in the DARCI screen

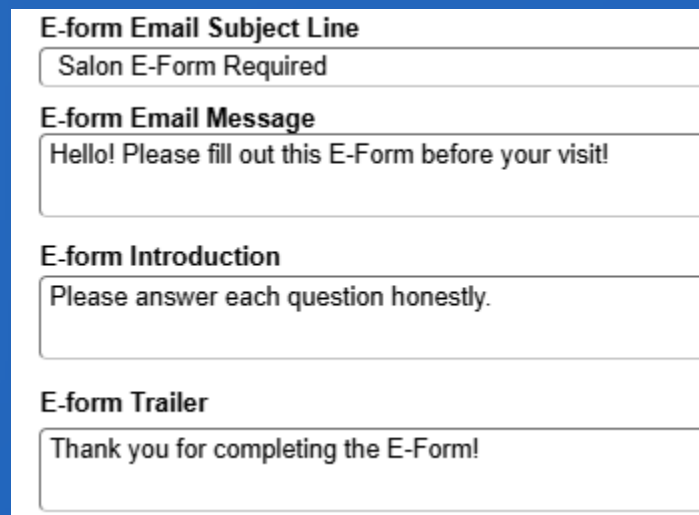


3. Enter the title that you want your E-Form to be named as in the first text box shown below, then click enter on your keyboard.



A screenshot of a web form titled "E-form Name" with a blue "Delete" button to its right. Below the title is a text input field containing the text "Client Intake Form". The input field has a light blue border and a small "x" icon on the right. A red rectangular box highlights the text "Client Intake Form" within the input field.

4. Enter the information that you want shown to your clients in the following text boxes. The E-Form introduction and trailer will be shown at the beginning and end of the E-Form itself.



A screenshot of a form with four sections, each with a text input field:

- E-form Email Subject Line**: The input field contains "Salon E-Form Required".
- E-form Email Message**: The input field contains "Hello! Please fill out this E-Form before your visit!".
- E-form Introduction**: The input field contains "Please answer each question honestly."
- E-form Trailer**: The input field contains "Thank you for completing the E-Form!".

5. Add your questions by typing in the question text box and choosing whether a client is required to answer. Next, you will select the type of question that is being asked.

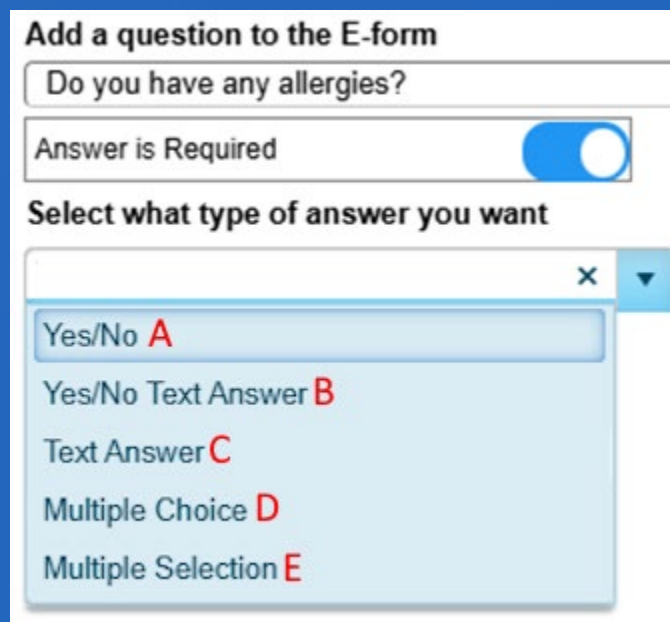
A. Yes/No

B. Yes/No Text Answer. (ie. Have you ever had a perm? If yes, when was your last perm?)

C. Text Answer. This allows the customer to type in their own answer.

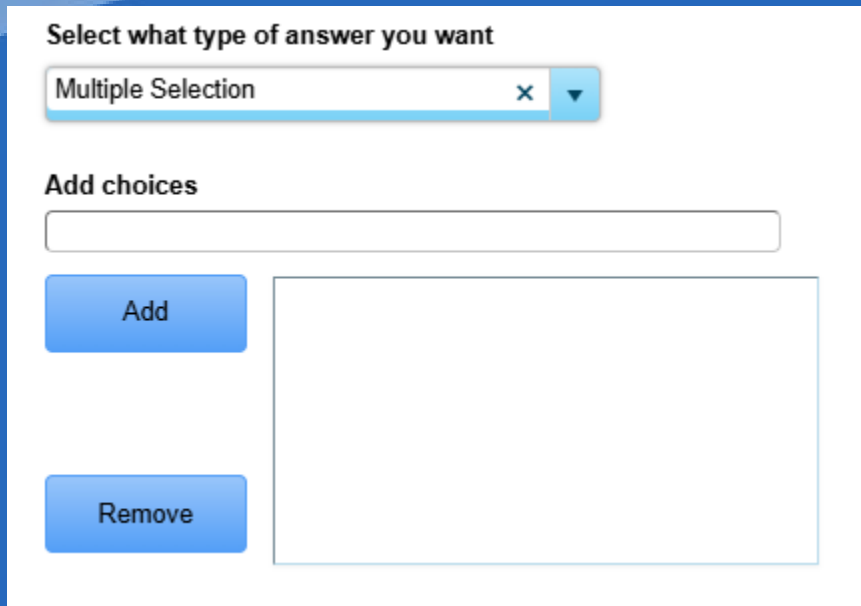
D. Multiple Choice. This allows the customer to choose 1 answer only from a multiple-choice drop-down list.

E. Multiple Selection. This allows the customer to choose multiple answers from the multiple-choice dropdown.



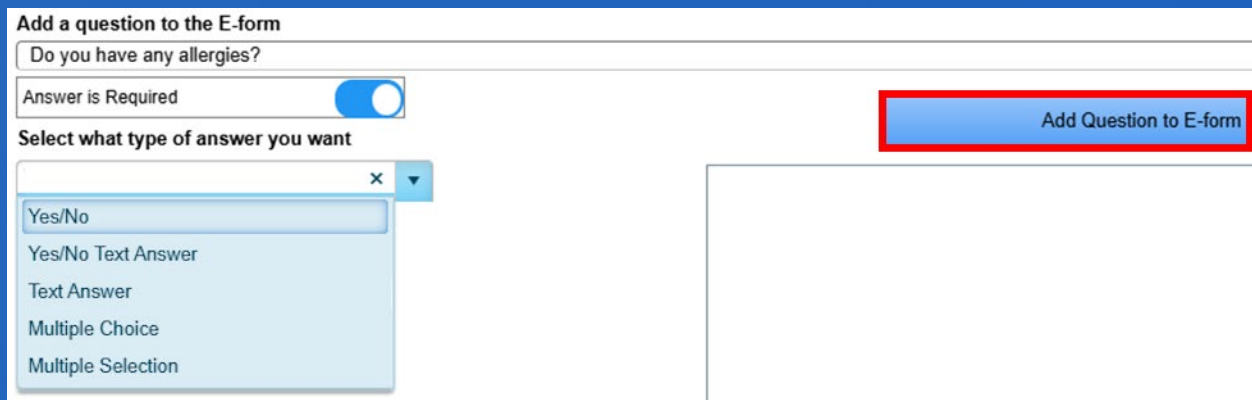
The screenshot shows a web interface for adding a question to an E-form. At the top, the title 'Add a question to the E-form' is displayed. Below it is a text input field containing the question 'Do you have any allergies?'. Underneath the question field is a toggle switch labeled 'Answer is Required', which is currently turned on. Below the toggle is a section titled 'Select what type of answer you want'. This section contains a dropdown menu with a list of options: 'Yes/No A', 'Yes/No Text Answer B', 'Text Answer C', 'Multiple Choice D', and 'Multiple Selection E'. The 'Yes/No A' option is currently selected and highlighted.

6. If you choose either 'multiple choice' or 'multiple selection' a secondary box will appear which will allow you to add choices. Type in a choice and then click 'add' to add it to the list.



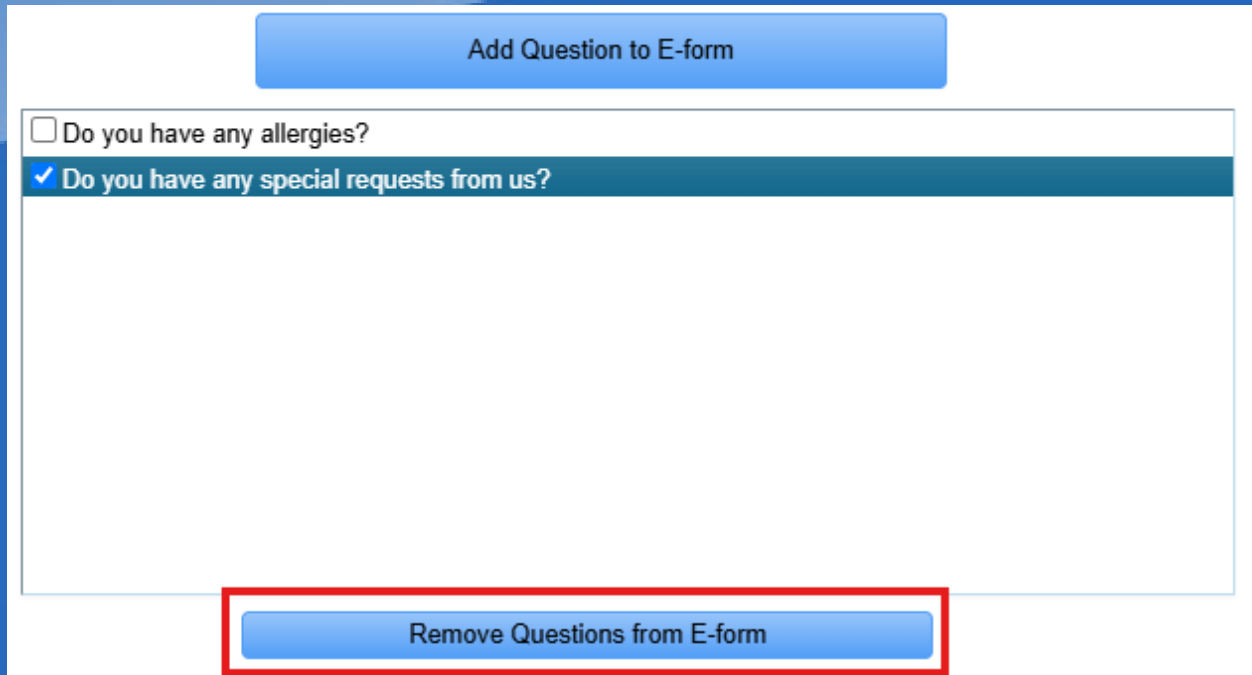
The screenshot shows a dialog box titled "Select what type of answer you want". At the top, there is a dropdown menu with "Multiple Selection" selected. Below this, the section "Add choices" contains a text input field. To the left of a large empty rectangular box are two buttons: "Add" and "Remove".

7. When you are done with your question click the "Add Question to E-Form" button.



The screenshot shows a dialog box titled "Add a question to the E-form". It contains a text input field with the question "Do you have any allergies?". Below this is a toggle switch for "Answer is Required", which is currently turned on. Underneath is another section titled "Select what type of answer you want" with a dropdown menu. The dropdown is open, showing options: "Yes/No", "Yes/No Text Answer", "Text Answer", "Multiple Choice", and "Multiple Selection". In the top right corner, the button "Add Question to E-form" is highlighted with a red rectangular border.

8. (Optional) Once you have added the questions you want, you can select any that you want to remove by clicking on them and clicking the remove button at the bottom.



The screenshot shows a web interface for editing an E-form. At the top is a blue button labeled "Add Question to E-form". Below it is a list of questions. The first question is "Do you have any allergies?" with an unchecked checkbox. The second question is "Do you have any special requests from us?" with a checked checkbox; this entire row is highlighted with a dark teal background. Below the list is a large empty white box. At the bottom is a blue button labeled "Remove Questions from E-form", which is highlighted with a red rectangular border.

9. On the right side of the E-Forms screen, you can turn on the "Send out with Darci" button. This will allow the E-Form to be attached to the customer's appointment reminder.



The screenshot shows a toggle switch labeled "Send out with Darci". The switch is currently turned on, indicated by a blue circle with a white dot inside.

10. You can choose the requirements of when the E-Form needs to be filled out below.

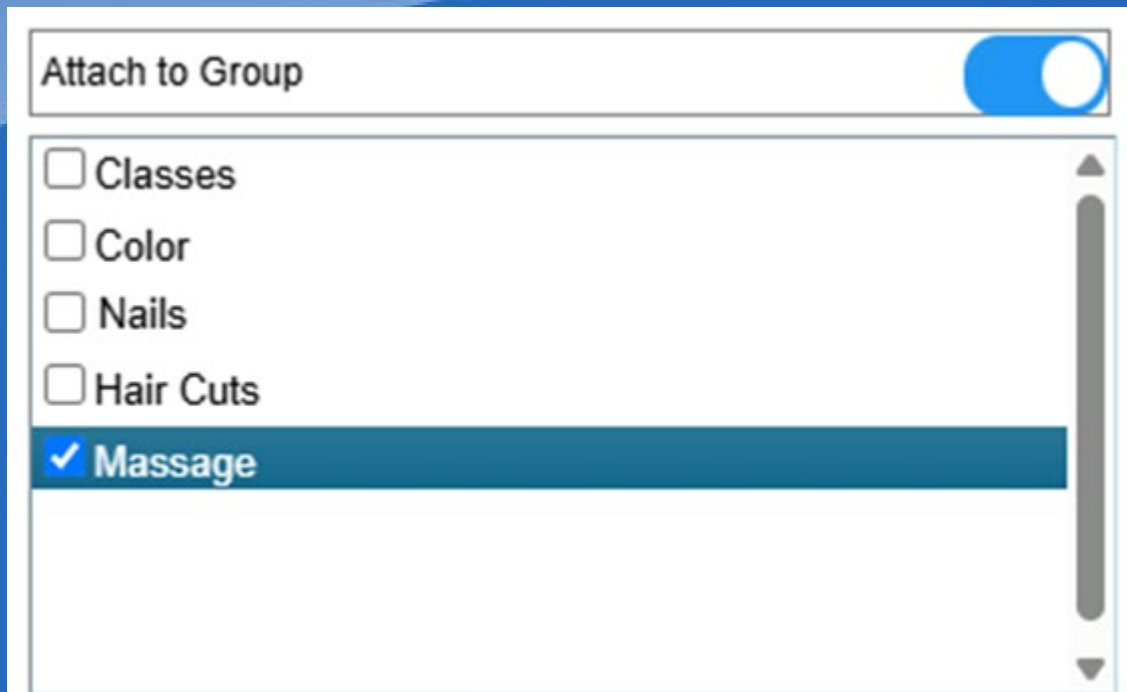
- a. "Required only once" means that a client must fill out this E-Form only one time, then their future appointments will not resend them the E-Form.
- b. "Required for each visit" will send the E-Form each time the client books the appointment.
- c. The "Required every..." option allows you to choose how long an E-Form will be valid. (ie. After this form is filled out, it will not send out again for another 12 months when it will need to be filled out again)

The screenshot shows a settings interface for E-Form requirements. It consists of three rows, each with a text label, a toggle switch, and a red letter label (a, b, or c). The first row is "Required only once" with a greyed-out toggle and label 'a'. The second row is "Required for each visit" with a greyed-out toggle and label 'b'. The third row is "Required every..." with a blue toggle and label 'c'. Below these rows are two dropdown menus: the first shows the number "12" and the second shows the unit "Month(s)".

Required only once	☐	a
Required for each visit	☐	b
Required every...	☒	c

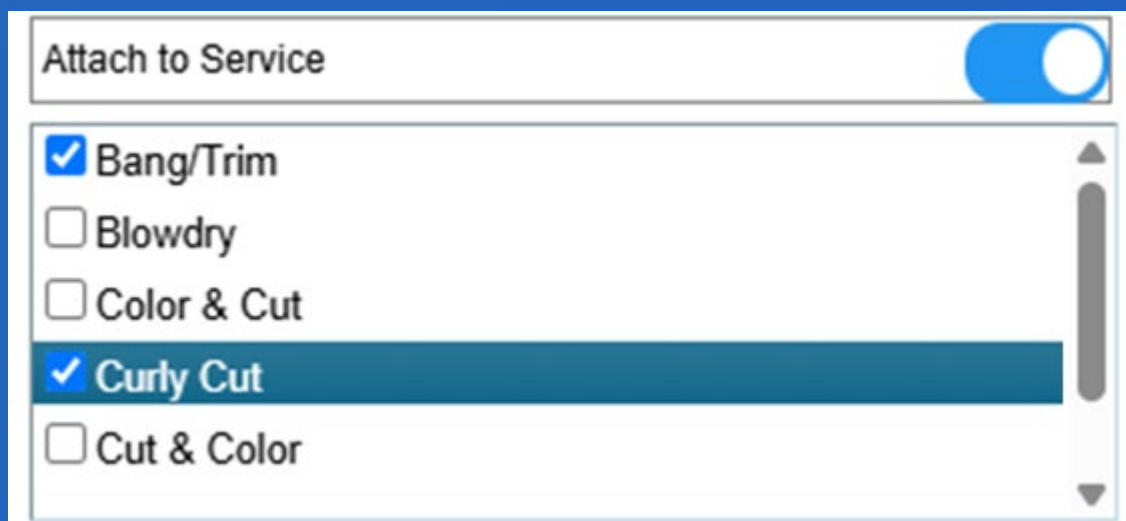
12 ▼ Month(s) ▼

11. Selecting 'Attach to Group' will send this form out any time any of the services within a whole group that are booked.



The screenshot shows a form titled "Attach to Group" with a blue toggle switch in the top right corner, which is currently turned on. Below the title, there is a list of services with checkboxes: "Classes", "Color", "Nails", "Hair Cuts", and "Massage". The "Massage" option is selected, indicated by a blue checkmark and a dark blue highlight bar. A vertical scrollbar is visible on the right side of the list.

12. Selecting 'Attach to Service' will send out just the specific individual services you've selected.



The screenshot shows a form titled "Attach to Service" with a blue toggle switch in the top right corner, which is currently turned on. Below the title, there is a list of services with checkboxes: "Bang/Trim", "Blowdry", "Color & Cut", "Curly Cut", and "Cut & Color". The "Bang/Trim" and "Curly Cut" options are selected, indicated by blue checkmarks and dark blue highlight bars. A vertical scrollbar is visible on the right side of the list.

13. Once your E-Form is set up, make sure to Save it by clicking the “Save E-Form” button at the top, and go ahead and email a test copy to yourself so that you can make sure it is exactly what you want!



14. And your E-Form is complete! Lastly, you'll want to see the client's completed forms. To check a client's filled out forms, you can go to a client's file by clicking the Clients button, searching for the client, then clicking the “E-Forms” button in the upper right.



15. If you need to send any additional E-Forms to a client for any reason, you can do so by choosing the E-Form in the drop down and sending it via E-Mail or text.

ClientEform

E-forms

Couples Massage Int... ▼

Email E-form

Text E-form

Copy E-form URL

Completed E-forms

▼

Exit



Message Intake Form

Guest Name: ***Required**

Enter your answer

Date of Birth:

Enter your answer

Suite #:

Enter your answer

FOR THE FACE: What are your skin concerns? ***Required**

Choose an option ▼

FOR THE BODY: What are your concerns? ***Required**

16. You can view completed E-Forms by choosing them in the dropdown then clicking “View completed E-Form”

ClientEform

E-forms

Exit

Completed E-forms

10/23/2025 : Couples ... ▼

Edit completed E-form

POIRED PLUS

Message Intake Form

Option: Stress
Option: Oily Skin
Option: Arthritis
Option: Discomfort
Option: Cellulite

Any Additional Comments?

Answer:

Signature:

Chris Portabello