**GOOGLE FORMS INSTRUCTION MANUAL:**

* There are three types of forms:
  + 1) Form (Form 1)for New Clients (NOT signed a retainer)
  + 2) Form (Form 2) for Existing Clients
  + 3) Appointment Scheduler
* Using **Forms 1 &2:**
* Log into Google Drive
* Use: [pmartinojr@gmail.com](mailto:pmartinojr@gmail.com)
* Password: Buzz0323
* Open Google Forms
* The Forms are split into two categories:
  + New Clients
  + Existing Clients
* Only those clients that have signed a retainer should fill out an existing client form
* We want to collect data using this form.
* The objective will be to use this data (i.e, cleint’s names, addresses, etc.) to automate documents.
* After someone has completed the form, click the responses tab.
* Click the Green symbol to view the results.
* Look to see which number on the left side the person filled in next to. Write this # down as we will use it for identification below.
* Then you will have a google sheet, on the google sheet go to File 🡪 Download as csv
  + Minimize this document.
* Open any of the following Word documents
* Go to tools, mail manager
* In the mail manager, go to #2 select recipients list.
  + Go 🡪 Get list, open data source
  + Open the file you just downloaded from google sheets
* The documents are pre filled with the values.
  + All you need to is go to the #5 tab of the Mail Manager (Preview Results).
  + Using the # you found above, use the arrow until you find the person/# you are looking for.
* Hit the <<ABC>> button to preview the results.
* Make sure all values are correct.
* Print document.
* **Using Forms 3: Appointment Scheduler:**
  + At the beginning of every week Attorney Martino will eliminate choices from the Google form of times that he is NOT available.
  + From here the form will leave open times that Attorney Martino can meet people.
  + You can use this form to either have clients schedule appointments in the officer; or
  + Schedule appointments over the phone from clients who call in.