# Morf Demo Script:

Grant Application

Aftia Morf / Doc Generation / Sign Demo

Setup

For this demo you'll need:

- MS Word with the Document Generation Add-on installed
- Power Automate with connections setup to your
    - Adobe PDF Services account
    - Adobe Sign Account
    - MS SharePoint account
- Internet access to reach https://www.getmorf.io/

Import the Power Automate Flow from MorfSampleGrantApplication_20220422201643.zip by going to My Flows in the Power Automate sidebar and clicking Import at the top of the page.
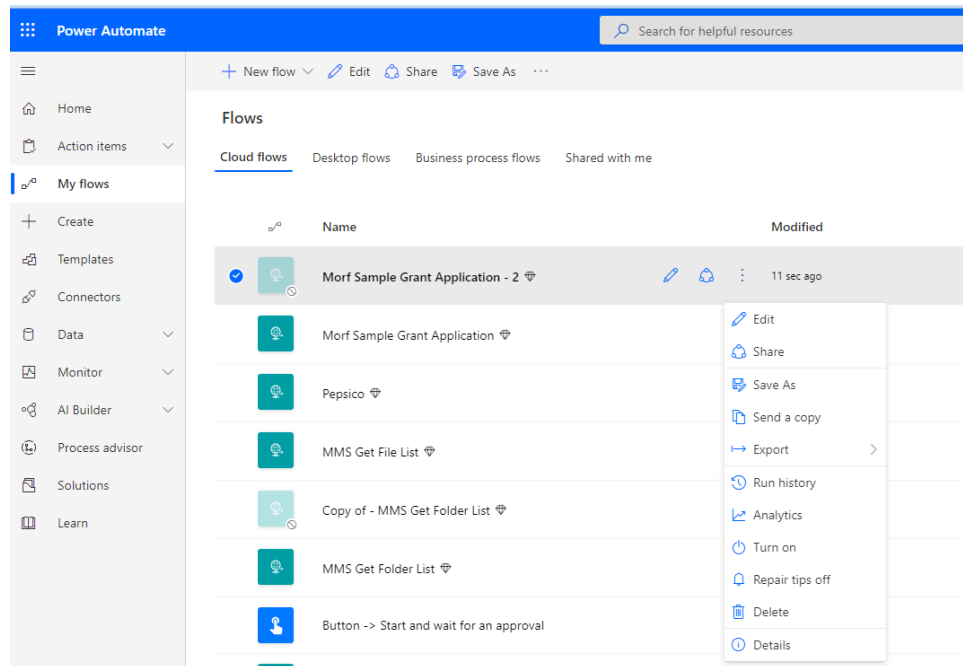

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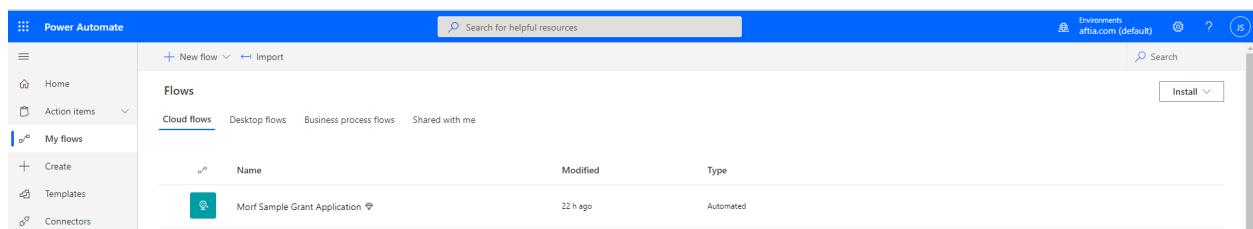
Select the file and setup the connections by clicking "Select During Import" for

- SharePoint Connection
- Adobe PDF Services Connection
- Adobe Sign Connection
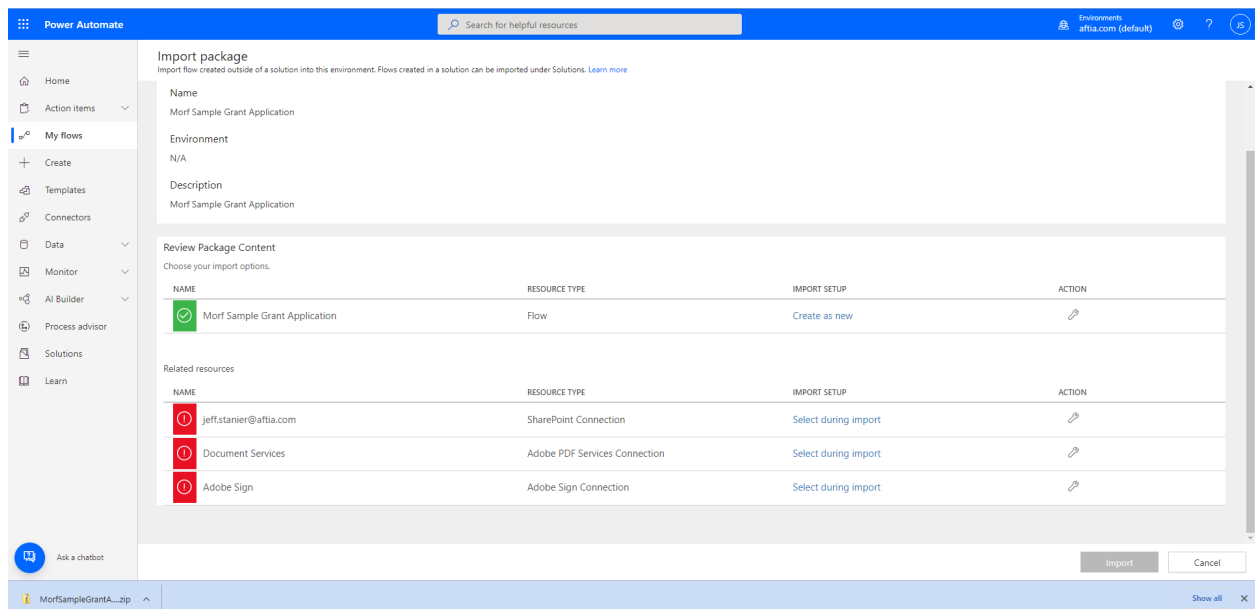
Then import the application. Under My Flows, select the Morf Grant Application you just imported and turn it on.

You are now ready to demonstrate building the Morf application.

Demo

Word Template

1. Open the edited Grant Application (GrantApplicationLMTemplate_Editted.docx) in Word
2. Open Document Generation tagger

   Click continue without JSON

   Create tags for

   - Author
   - Date
   - Organization.name
   - Organization.established
   - Organization.contact

   Insert author and date on the first page and Organization.name, Organization.established, and Organization.contact on the second page.

   NOTE: it doesn't matter what you name these fields. Call them foo and foo_bar if you like. The JSON payload from Morf will still match the document.
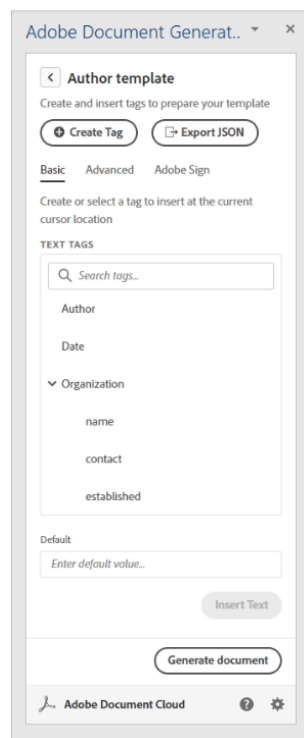
3. Scroll to the bottom of the document and insert an Adobe Sign tag for Signer 1 with the field type: Signature

4. Save the word document

5. Tell the customer that for demo purposes the rest of the document has already been tagged. It is that simple you just need to put some fields in with double curly braces by hand or using the Tagger.

6. Put the Word file into a SharePoint folder.

Conversion to Morf

1. Go to https://editor.getmorf.io/ and click on Convert. Select the Word document you previously tagged.
2. Show the audience that the Word tags have been turned into form fields!
3. Edit the Morf form in the left hand pane.
- Change the title to Grant Application

```
"head": {
  "title": "Grant Application",
  "logo": "https://tailwindui.com/img/logos/workflow-mark-indigo-600.svg"
},
```

Change the logo to the customer's logo (if you like)

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```
"head": {
  "title": "Grant Application",
  "logo": "https://customer.com//logo.svg"
},
```
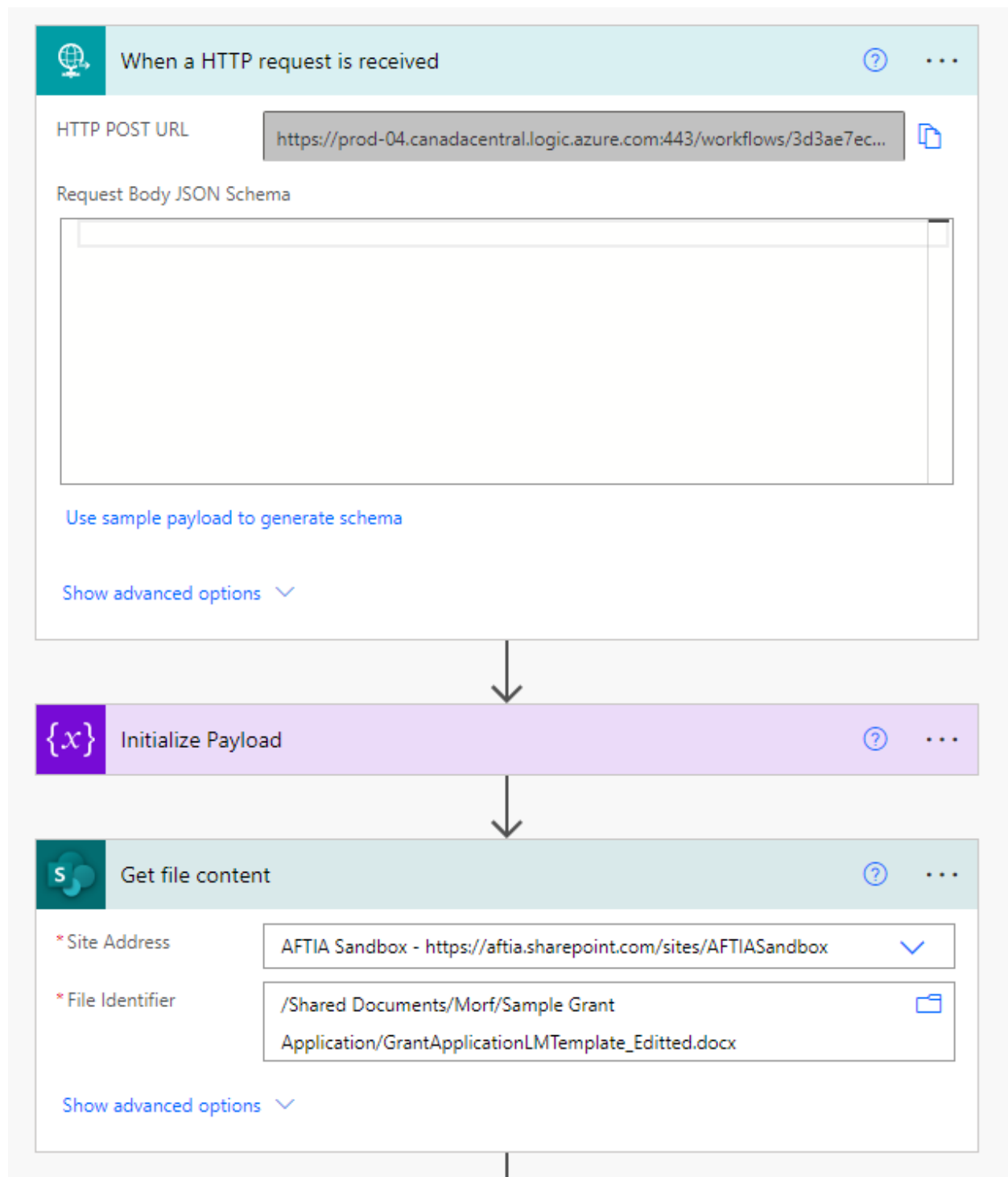
Change the Organization Goals field's type to textarea to make it a multiline field. You can skip this step too if you like

```
{
  "type": "textarea",
  "label": "Organization Goals",
  "bind": "Organization.Goals"
},
```

Show the customer that the changes happened in real time!

Open Power Automate

1. Edit the flow and copy the HTTP Post URL from the first step.

When a HTTP request is received

HTTP POST URL

https://prod-04.canadacentral.logic.azure.com:443/workflows/3d3ae7ec...

Request Body JSON Schema

Use sample payload to generate schema

Show advanced options ⌄

Initialize Payload

Get file content

* Site Address

AFTIA Sandbox - https://aftia.sharepoint.com/sites/AFTIASandbox ⌄

* File Identifier

/Shared Documents/Morf/Sample Grant
Application/GrantApplicationLMTemplate_Editted.docx

Show advanced options ⌄

2. While you are here make sure the Sharepoint step is using the word document you stored there earlier.
3. Explain to the customer the steps in the flow

4. Go back to your Morf form and edit the submit value under config. Paste the URL from Power Automate.

```
{
  "config": {
    "submit":
"https://prod-18.canadacentral.logic.azure.com:443/workflows/02afda634e0....",
    "successUrl": "http://getmorf.io,/",
    "theme": "",
    "externalId": ""
  },
```

Form Submission

1. Click the preview button in Morf.
2. Now fill out the form.   Fill out as much or as little as you like. Just be sure to enter an email address in the Organization email field.   This will be picked up by the Power Automate Flow, and the document will be sent there for signature. Click Submit

Signing

1. Open up the inbox of the email address you specified in the Morf Form. You should have an email from Adobe Sign waiting for you.
2. Open it up, show that the document is populated with the information captured in the Morf Form
3. Sign the document.

You are done. You just built an end to end application right in front of the customer's eyes. How kick-add is that?

Have questions? Contact jeff.stanier@afita.com

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