

# COSMETIC RELEASE FORMS APP SETUP GUIDE

The easy-peasy manual for setting up and making changes to CRF app.

This document is updated with every single update to CRF app.

CRF-SU-Doc v 1.0 • December 2017 • by Voluta Digital LLC

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## 1. Accessing CRF App Settings

1. Click on the little gear icon, bottom right.
2. Tap SETTINGS up top. Enter your password or the default 1234

The CRF SETTINGS area controls app admin permissions, enables cloud services for upload of your forms/databases and collects data to auto-populate your release forms. CRF requires minimum information to demonstrate functionality.

The minimum information required, perhaps to sample the app:

- Studio name
- At least one specialist name
- At least one cloud service enabled and linked

Vital Information:

(accurate completion will generate release forms that maximize your legal coverage)

[This section populates the final PDF release form generated by CRF.](#)

1. All local and state health codes that govern your studio. You might find these on your current release form. For updated codes, contact your attorney or local health department. (e.g. COMPLIES WITH 555-51C-5>55 CALIFORNIA CODE)
2. Proper spellings of all specialist legal names. Nicknames are not advised as this app will generate a legal document you may later need.
3. Studio address and contact information, including proper website URL, contact email and phone number.
4. Cloud service sign-in credentials, such as login name and password. For the current version of this app, we offer Google Drive, Dropbox, OneDrive and Box support. Instructions for obtaining and linking your cloud service follow.
5. Your studio logo loaded into your iPad library.

QUICKSTART LOGO TIP: Take a well-framed landscape-mode photo of your logo with your iPad. Edit the image in your favorite iPad image editor if you desire.

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## 2. Studio Options setup

### *Add your studio legal name*

This is the legal name of the studio. The studio legal name will auto-populate the LEGAL tab in CRF. This must be entered correctly with designations (such as LLC) in order to generate legally valid release forms.

PDF output: The PDF release forms generated by CRF will add the term STUDIO after the legal name you enter here.

### *Add specialist names*

Add specialist names by tapping this field. You can also delete them here.

PDF output: The names entered will appear on the PDF release form generated by CRF, so make sure spellings are correct.

### *Add studio logo*

Choose your studio logo from the iPad photo library. Clients will enjoy your logo throughout the app.

PDF output: The logo will NOT appear on the PDF at the top of the page. Instead, a solid legal heading will be generated from the other info you've added to CRF app.

### **QUICKSTART LOGO TIP**

Take a well-framed landscape-mode photo of your logo with your iPad. Edit the image in your favorite iPad image editor if you desire.

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### 3. Studio Vital Information setup

This section populates the final PDF release form generated by CRF.

#### *Add your studio legal name*

This is the legal name of the studio. The studio legal name will auto-populate the LEGAL tab in CRF. This must be entered correctly with designations (such as LLC) in order to generate legally valid release forms.

**PDF output:** The PDF release forms generated by CRF will add the term STUDIO after the legal name you enter here.

#### *Add your studio address/ city/ postal code*

This is the physical address of the studio, not the owner's home address, random PO Box, etc.

**PDF output:** This information will appear on the PDF at the top of the page.

#### *Add your studio phone number*

This is the official phone number of the studio.

**PDF output:** This information will appear on the PDF at the top of the page.

#### *Add your studio website*

This is the advertised URL of the studio.

**PDF output:** This information will appear on the PDF at the top of the page.

#### *Add your studio email*

This is an active email address that might be private to management. This can be an owner or studio support email address, one checked frequently.

**PDF output:** This information will appear on the PDF at the top of the page.

#### *Add your local or state codes*

These are the codes that govern the health of your studio. You might find these on your current release form. For updated codes contact your attorney or local health department. (e.g. COMPLIES WITH 555-51C-5>55 CALIFORNIA CODE).

Proper codes are the responsibility of your studio, not Voluta Digital LLC or affiliates.

**PDF output:** This information will appear on the PDF at the top of the page **BOLD AND CAPITALIZED**.

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## 4. Making a Sample Waiver for your Health Department

You will simply submit a sample form, as a client, which will upload to your cloud. You can share the link directly with the your health inspector via email, or you can print directly from your cloud.

### Set up your CRF app:

1. Make sure your CRF settings are PERFECT.
2. Open CRF, go to SETTINGS by tapping the little wheel, bottom left corner.
3. All of your specialist names, local health codes, etc.
4. Make sure all the clauses you want your clients to see--and the ones your health department demands, if any--are loaded into CRF in SETTINGS>Legal Clause Editor.
5. Make sure your health questions are the same as step two above.

### Make a sample client waiver:

1. Take an excellent FAKE ID photo, so it is nice and clear for them to read in the waiver you will print. We suggest that you use your own ID, just tape over private info. You want the health department to see the nice, clear ID photo in the sample waiver.
2. We suggest you name the client SAMPLE FORM FIRST NAME and SAMPLE FORM LAST NAME.
3. At the end, in the Specialist Notes Pane, add any inks, needles or disposables your health department requires, if any. If they don't require them, I would not add them. They don't need any ideas. :)

### Print your sample waiver:

1. Once your form is successfully submitted, mail them the link to it from your cloud. Or, if they need a printed copy, go to your computer connected to a printer.
2. Log into your cloud online by going to the .com of the cloud (https://www.google.com/drive/, etc).
3. Go into the folder that our app put on your cloud called Voluta Digital Cosmetic Release Forms. Your sample waiver will be there. Print it and hand it to them.

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## 5. Passcode Settings

Two passcodes control this app: one for management and one for specialists.

### Change the CRF Master Passcode

The default Master Passcode is 1234 and can be changed at will.

This code allows access to CRF SETTINGS and IN-APP PURCHASES screens. Intended for management only, limiting the information that specialists can access.

### Skeleton Code

The Master Passcode is also a skeleton key code that can be entered into all numeric keypads, so management does not have to know the specialist passcode. Easy to remember.

### Change CRF Artist Passcode

The default specialist passcode is 0000 (zeros) and can be changed by management at will.

Management chooses one passcode shared by all specialists. This allows specialists to access limited sections of the app. Artists need a passcode only to verify client database searching (for return clients), to add or update specialist notes and to sign the release form before uploading.. Artist passcodes do not allow access to admin features such as IN-APP PURCHASES or CRF SETTINGS.

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## 5. Cloud Services Settings

**IMPORTANT:** At least one cloud service must be enabled for this app to function.

Connect your existing Google Drive, Dropbox, OneDrive or Box cloud service

Open CRF, and it will ask for permission to access your cloud. Depending on the action of the cloud service, you may have to re-open CRF app once you connect. Note the green ON button for your service with an UNLINK option beneath. You're ready!

Obtain a cloud service.

Choose and set one up by visiting a cloud service website (info below). Once your cloud account is created, return to this app and select your cloud service and enter your new login name, email address and/or password. Depending on the action of the cloud service, you may have to re-open CRF app once you connect. Note the Green ON button for your service with an UNLINK option beneath. You did it!

CRF will automatically place a folder on your cloud called **Voluta Digital Cosmetic Release Forms**. All CRF waivers and settings backup files will be stored in this folder. To quickly find the folder on your cloud, login to your cloud via computer browser and search for the folder by name, or go to RECENT items.

### Supported Cloud Services

Thousands of our tests have proven that you will have great success storing and accessing your release forms using the following cloud services. **IMPORTANT!** CRF app only uses iCloud for one feature: Device Sync. Information about Device Sync is found in this document.

<p><a href="https://drive.google.com/">Google Drive: google.com/drive</a> Free account includes 15 GB cloud storage. If you have a Gmail address, then you have a Google Drive. (free storage: 30,000+ CRF release forms)</p>	<p><a href="https://dropbox.com/">Dropbox: dropbox.com</a> Free account includes 2 GB of cloud storage. (free storage: 4,000+ CRF release forms)</p>
<p><a href="https://box.com/">Box: box.com</a> Free account includes 10 GB cloud storage. (free storage: 20,000+ CRF release forms) HIPAA Compliance: Box provides--not for free-- the administrative, technical and physical safeguards to support your organization's compliance with HIPAA. See Box.com for price details.</p>	<p><a href="https://onedrive.live.com/">OneDrive: onedrive.live.com</a> Free account includes 5 GB of cloud storage. (free storage: 10,000+ CRF release forms)</p>

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## 6. Form Options Settings

Here you can configure CRF app to exchange more information with your clients. CRF can automatically send your clients their healing instructions, a copy of the waiver as they complete it, enable and program pop-up messages, require a second photo for double-sided IDs, and other handy features.

### Overview of configurable form options:

- Automatic Emailer
- Initial Popup
- Client Optional Notes
- Require Email
- Additional Form Options
- Require Second Picture of Gov't ID
- Capture Picture of ID

These features are explained in detail below.

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## 7. CRF Automatic Email feature

Configure CRF to automatically email your clients in two ways.

1. Enable CRF to automatically email clients a PDF copy of the waiver they submit for each session. Note that enabling this feature will automatically require email addresses from all clients.
2. Email PDFs to your clients that are stored on your cloud. Perhaps you would send your healing instructions or information required by your local health laws. Instructions for the simple construction of a PDF are below.

### *Gmail Address Required*

For now, only Gmail allows this feature to function smoothly. You'll need a Gmail address, which takes only minutes to achieve at Gmail.com. We are looking for other ways. Meantime, Gmail rules.

### *Gmail Account Settings*

1. Ensure that your iPad is connected to the internet for this setup. After setup CRF will function beautifully with no connection.
2. Slide "Enable Automatic Emailer" to green.
3. Enter your Gmail login information.

### *Email waivers to clients: CRF can automatically email waivers to clients*

1. Ensure that your iPad is connected to the internet for this setup. After setup CRF will function beautifully with no connection.
2. Slide "Email Waiver to Client" to green.
3. Add your waiver email subject and body text.

As the waiver is submitted to your cloud it will be sent to the email address provided by the client.

### *Email PDFs to clients: CRF can automatically email waivers to clients.*

1. Ensure that your iPad is connected to the internet for this setup.
2. Slide "Enable PDF attachment" to green.
3. Tap "Select PDF to attach". The Cloud File Selector will appear. Scroll to find your PDF and tap SAVE. You will see a dialog indicating the download of the PDF to CRF app and the title PDF will be displayed.
4. Add your PDF email subject and body text.

### *Make your own PDF documents: a tutorial*

1. Make your document in your favorite word processor, such as Google Docs, Pages or Word.
2. Go to Print or Export in that app and choose ".pdf". Dialogs will appear to help you do it right.
3. Upload that .pdf to your **Voluta Digital iPad Cosmetic Release Forms** folder in the cloud your waivers upload to.
4. Read the section **PDF EMAILER SETTINGS** above.

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## 8. Initial Popup and Client Notes Settings

### *Initial Popup Settings*

This setting controls the content that will pop up for the client as they begin use of CRF app. Here you might include any information that you require clients to know before their session. You could add a marketing message or any message you choose. The popup defaults to OFF upon download of CRF app.

*Enable/Disable Popup option:* Slide the button under INITIAL POPUP OPTIONS. Green means your message is live for the next client to use CRF app.

*Provide initial popup text:* Tap to enter text. You can type in your message or cut, copy and paste it from a document that you have open in another app by using the iPad OS cut/copy/paste feature.

### *Optional Client Notes*

Giving your clients a chance to be heard is priceless. Enabling the 'Client Notes' feature asks them to tell you anything that brings them comfort. Having this on your waiver--in writing--might serve to better connect with them. Slide to green and a pane will open for them stating "Client: what would you like to tell us?" They can tap "Skip" if they want to.

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## 9. Require Email Settings

CRF helps you connect with clients via email in two ways.

1. Request an email address for marketing purposes. (Asking permission makes for loyal followers.)
2. Require an email address for office use. (Perhaps to share information about aftercare, appointments, or legal disclaimers required by law.)

Slide to green to require email addresses. A pop-up will explain to the client why you are requiring email for official use in case they denied your request to receive marketing messages.

## 10. Additional Form Settings

CRF helps you to present a particular form or message to your clients as they complete their waiver. This is more than just a pop-up message. Perhaps your local health department requires your clients to read a lengthy document before service, but it's not exactly a legal clause or health matter. You can require the client to read the form, simply append it to the uploaded waiver without client viewing, or both.

*Add your additional form to CRF app*

1. Ensure that your iPad is connected to the internet for this setup. After setup CRF will function beautifully with no connection.
2. Slide "Enable Additional Form" to green.
3. Tap "Select PDF". The Cloud File Selector will appear. Scroll to find your PDF and tap SAVE. You will see a dialog indicating the download of the PDF to CRF app and the the title PDF will be displayed.
4. "Append to End of Waiver" and/or "Require Clients to Read" by sliding one or both to green to enable.

## 11. ID Photo Capture Settings

*Require Second Picture Of Government ID:* Slide to green to enable or disable.

Most government/military IDs have pertinent info on both sides, so a second photo is needed to capture it all. Enabling this feature means that when a client chooses "Gov't ID" they will be prompted to take two photos of their ID. Both will be added to the uploaded PDF waiver.

*Capture Picture Of ID:* Slide to green to enable or disable.

By default, CRF app is set to capture ID photos. In some cases--and countries--it is not common to carry or request photo ID. Other documents prove identity. Disable this feature and CRF will skip the ID photo capture, moving clients directly to data entry. We recommend in the USA that you capture that ID in case a question of legal identity arises in the future.

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## 12. Database Options

CRF app generates a database of all client info collected from the waivers they submit, EXCEPT health data. This database can be:

- viewed on your iPad
- exported as a financial report
- exported as a CSV file format spreadsheet
- backed up to your cloud
- restored from your cloud to the same or different iPads

### *Client List Viewer: Has this client ever used CRF app?*

This feature is designed to help you determine if a client has ever used CRF on any iPad in your studio, at any location. Mainly so they can enjoy the quick-resubmit feature of CRF. Also, so that you can reduce the amount of data that CRF stores in your iPad by deleting clients from your individual iPad(s). This feature is popular with studios that have multiple locations and are enjoying the CRF Device Sync option so that all clients can quickly resubmit waivers on any iPad, anywhere. This feature was requested by numerous studios, so viola!

1. Scroll through a list of all the clients stored on this device. This list represents all the forms submitted or saved onto this device. If you are using the Device Sync option, this list will also include forms saved or submitted from other iPads as well. You may delete clients from this device by selecting all the clients to delete then tapping the 'remove' button.
2. The client waivers are NOT REMOVED FROM YOUR CLOUD. They are simply removed from the device in your hand. Again, this was a requested feature, so you may not need it.

### *Financial Reports: Overview*

CRF can generate financial reports in full or sorted by employee, date range, or date range and employee. This exports a tidy CSV format spreadsheet for easy import to most any financial software. The report will land on your connected cloud in a folder called **Voluta Digital Cosmetic Release Forms**.

While completing session notes, the specialist can enter these financial datapoints: Amount Due, Deposit, Amount Paid, Total Tax and Payment Method, namely credit card, cash or gift certificate.

### *Generate and export Financial Reports*

1. Tap FINANCIAL REPORTS. The Financial Report Selector will appear. Tap the report you'd like to see and it will upload to your cloud in a folder called **Voluta Digital Cosmetic Release Forms**.
2. See that report on your cloud, titled by: Report name/date/time in 24 hour format.

Example: CRF\_AllFinancial\_07-03-2016 19\_02\_46.csv

Which means: CRF All Financial Report, July 3 2016, 7:02:46 seconds PM.

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### 13. Export, backup and restore your Client List or Database

#### Export Client List: KNOW THY CLIENTELE

Client details (non-health) exported via tidy spreadsheet (.csv format). GOLDMINES of information are trapped in your waivers! Learn your target market so you know what to paint, what to print, how many hoodies you should make and exactly who will buy them.

\*\*Included with the Unlimited Subscription

\*\*Offered as an in-app purchase for bundle users

#### Export your Client List Spreadsheet

Tap the EXPORT CLIENT LIST button. A handy progress bar will show your .csv file uploading to your cloud. Find the **Voluta Digital Cosmetic Release Forms** folder in your cloud via computer browser and open with your favorite spreadsheet editor. Now enjoy a gold mine of (non-health related) client data. Turn data into greater client satisfaction and money!

#### Backup and restore up your Client Database

There is no need for your return-clients fill out new forms from scratch if you switch iPads! Set CRF to back up and automatically synchronize an encrypted database of your clients to your cloud. If you switch iPads you can simply restore this database to the new iPad so your return clients can enjoy this time-saving feature on the new iPad. Your client database is a simple file, nothing too complicated for you to handle. We promise.

#### Backup your Return Client Database

*Note: This may take some time, depending on how many clients you take between backups. It's working just fine--don't panic. Watch the handy progress bar and believe in the power.*

Tap the BACKUP CLIENT DATABASE button. Confirm the backup, and the progress bar will indicate upload. CRF will tell you when it is complete.

You will see a file titled "CRF 01-11-2016 23\_17\_33" which means "mo-day-year hour\_minute\_second"

Success!

#### Restore your Return Client Database from the cloud to your iPad

Tap the RESTORE CLIENT DATABASE button.

1. Confirm that you want to restore.
2. Select the cloud service which stores your database file.
3. Scroll through the files to choose the "CRF mo-day-year..." backup you desire.

*Note: This may take some time, depending on how many clients you take between backups. It's working just fine, don't panic. Watch the handy progress bar and believe in the power.*

The progress bar will indicate a download, and CRF will tell you when it is complete.

Resume use of CRF and the easy re-submission of release forms by return clients.

They will thank you!

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## 14. Managing CRF App Health Items, Legal Clauses and Artist Tools

CRF encourages the full customization of the app to your studio needs. You will enjoy the option to edit the health questions and legal clauses you present to your clients. Also, you might like to--or be required by law to--keep track of the tools and pigments you use on every client. CRF makes it easy to add your own questions, clauses and tools or remove some of the handy defaults built right into CRF. This information is organized into completely customizable lists.

The following sections explain how to add, remove, edit and rearrange these lists:

- Health Questions/Items
- Legal Clauses/Items
- Artist Tools/Items

### *Health Questions/Items List Editor*

You have full control over the health questions you ask your clients. By default CRF app is loaded with many health questions enabled.. This aids you to set the app up quickly and get to work. If you would like to remove certain health questions or add your own, you can do so swiftly in the EDITORS settings.

Tap EDIT HEALTH QUESTIONS to add new health questions, remove unwanted questions, or restore the default health questions. From here on we will call health questions “items”.

### *Remove Health Items*

1. Tap EDIT HEALTH QUESTIONS, then tap on any item and a check mark will appear, indicating that you chose the item. Check multiple items if you prefer.
2. Tap REMOVE SELECTED button at the bottom of the screen. CRF app will ask you to confirm your choice.
3. Tap SAVE and your health list is updated for the next client to use CRF.

### *Add Health Items*

1. Tap EDIT HEALTH QUESTIONS, then tap ADD A NEW ITEM at the bottom of the screen.
2. A screen will appear for you to title your item, select a category for it, and to determine how the client should answer.
3. Enter this information and tap DONE. The new item will appear on the list you see before you.
4. Tap SAVE and your health list is updated for the next client to use CRF.

### *Rearrange Health Items*

1. Tap EDIT HEALTH QUESTIONS, then tap REARRANGE and your items will appear in a list with ‘handles’ on the far right of each field, which are stacks of lines. Place your finger on the handle and drag it up or down to the desired location relative to the other items. Once all items are arranged to your liking, tap DONE EDITING. Items will appear this way until you rearrange or reset them to default settings.

(continued)

#### **Edit Existing Items**

1. Tap EDIT HEALTH QUESTIONS, then tap on any item and a checkmark will appear, indicating that you chose the item.
2. Tap EDIT SELECTED ITEM
3. A text editor box and keyboard will appear. Once edited, tap OK. The updated item will appear on the list you see before you.
4. Tap SAVE and your items are updated for the next client to use CRF.

#### **Restore default Health Items**

If you decide to clear your questions and go back to those installed in CRF:

1. Tap RESTORE DEFAULT ITEMS
2. Confirm that you intend to wipe all items and return to the default list.
3. Tap SAVE and your health list is updated for the next client to use CRF.

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## **15. Legal Clause/Items List Editor**

You have full control over the legal clauses you present to your clients. By default CRF app is loaded with many legal clauses enabled, gathered from dozens of sources.. This helps you set the app up quickly and get to work. If you would like to remove certain legal clauses or add your own, you can do so swiftly in the EDITOR settings.

Tap EDIT LEGAL CLAUSES to add new clauses, remove unwanted clauses, or restore the default legal clauses.

#### **Remove legal clauses**

1. Tap EDIT LEGAL CLAUSES and tap on any clause and a check mark will appear, indicating that you chose the clause. Check multiple clauses if you prefer.
2. Tap REMOVE SELECTED button at the bottom of the screen. CRF app will ask you to confirm your choice, to prevent mistakes.
3. Tap SAVE and your legal clauses are updated for the next client to use CRF.

#### **Add a new clause**

1. Tap EDIT LEGAL CLAUSES, tap ADD A NEW CLAUSE at the bottom of the screen.
2. Tap to enter text. You can type in your clause or cut, copy and paste it from a document that you have open in another app using the iPad OS cut/copy/paste feature.
3. Once your clause is entered tap DONE.
4. Tap SAVE and your clauses are updated for the next client to use CRF.



(continued)

#### Rearrange clauses

Tap REARRANGE and your clauses will appear in a list with 'handles' on the far right of each field. Place your finger on the handle and drag it up or down to the desired location relative to the other clauses. Once all clauses are arranged to your liking, tap DONE EDITING. Clauses will appear this way until you rearrange or reset them to default settings.

#### Edit existing clauses

1. Tap on any item and a checkmark will appear, indicating that you chose the item.
2. Tap EDIT SELECTED CLAUSE.
3. A text editor box and keyboard will appear. Once edited, tap OK. The updated clause will appear on the list you see before you.
4. Tap SAVE and your clauses are updated for the next client to use CRF.

#### Restore default legal clauses

If you decide to clear your clauses and go back to those installed in CRF:

1. Tap RESTORE DEFAULT CLAUSES.
2. Confirm that you intend to wipe all clauses and return to the default list.
3. Tap SAVE and your clauses are updated for the next client to use CRF.

## 16. Artist Tools/Items List Editor

CRF app comes loaded with many popular tools we use everyday. You can add to or remove from the default lists as you wish. We are working to add more tools and common brands but it may take a while to get agreements with manufacturers. We encourage you to add your own tools AND to give us feedback about what you want to see loaded default in CRF app so we can tell manufacturers!

The current lists of tools in CRF that you can edit are:

-pigments, blades and cartridge needles

Below is an example of how to alter your tattoo pigment list. The instructions will apply to all other specialist tool lists you need to edit as well.

#### Example: Editing pigment list

Click here to add new pigments, remove unwanted pigments, or restore the default pigment list.

##### REMOVING pigment:

1. Scroll to find the pigment you wish to remove, aligning it center screen.
2. Tap REMOVE pigment button at the bottom of the popup. CRF app will ask you to confirm your choice.
3. Tap DONE and the pigment will no longer appear on your pigment list.
4. Tap SAVE and your pigment list is updated for the next specialist to use CRF.

(continued)

**Example: Adding pigment**

1. Tap ADD pigment at the bottom of the popup.
2. A screen will appear asking you to title your pigment brand, color family, and color of the new pigment.
3. Enter this information and tap ADD pigment.
4. Tap DONE. The new pigment will appear on the list you see before you.
5. Tap SAVE and your pigment list is updated for the next specialist to use CRF.

**Example: Restoring default pigments**

If you decide to clear your pigments and go back to those installed in CRF:

1. Tap RESTORE DEFAULT pigments
2. Confirm that you intend to wipe all items and return to the default list.
3. Tap SAVE and your pigment list is updated for the next client to use CRF.

## **17. Device Options Settings**

### **Slideshow Options**

You can load your images into your iPad and CRF app will display them in a gorgeous rolling slideshow for use in your lobby or tattoo stations. Here you can:

- enable the slideshow
- set the timeout period before a slideshow starts
- set the delay between shown images
- select the iPad Photos app album containing your slideshow images.

1. Load images into your iPad. You can do so in a variety of ways outside of the scope of this tutorial. Easily summoned on YouTube.
2. Choose when you want the slideshow to begin after the last use of CRF, how long you want each image to show on screen, and which album you wish CRF to pull images from.
3. Tap DONE. Your slideshow will begin shortly, but not mid-waiver.

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## Screen Orientation Options

Here you make choices about how you want CRF app to appear on your iPad.

- Auto-Rotate: As the iPad is turned in hand, CRF app adjusts automatically to fit the screen.
- Fixed Portrait/Upright: Taller than wider. Choose this if you want CRF to stay this way.
- Fixed Landscape/Sideways: Wider than taller. Choose this if you want CRF to stay this way.

## Device Sync

One of the best features of CRF is the return-client, quick-resubmit feature. The iPad recalls the first waiver that the client submitted at their first session. The client reviews the information to see if any has changed, and if not they simply sign again and the form is complete. No need to complete a lengthy new form each time. This saves endless hours of human potential and gets them from door to service much faster.

Device sync is helpful when you are using multiple iPads to serve CRF to your clients. You might need one iPad at each of five studio locations, or five iPads at your busiest studio. To ensure that any client can enjoy the quick-resubmit feature on any iPad they approach, Device Sync is automatic and ready.

[Device Sync utilizes iCloud, and is the only aspect of CRF that utilizes iCloud. Read that again.](#) This is not related to the cloud that stores your waivers. iCloud is only used to enable Device Sync. This will take a few minutes to set up but you only have to do it just once for each device and CRF will repay you in countless hours saved.

### A note on sync timing and patience...

Device Sync works best if you avoid rapidly enabling and disabling the feature. Your devices will sync soon....or maybe later. Many factors determine speed of sync. The size of your client database, speed of your connection, and how long it takes the interwebs way up there to connect and play nice. Could take seconds, might take until morning. You can peek at the sync by checking the Database Viewer in the Database Options pane in CRF Settings. This feature is worth the wait! Thanks for your patience. The next section will tell you how to set up Device Sync.

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## Setup Device Sync

1. Gather your Apple ID login credentials, such as login email address and password. You need the login for the Apple ID associated with the credit card you have on file with Apple that allows you to purchase content from iTunes and the App Store. This is probably a business credit card belonging to your studio.
2. On **EACH iPad** that you wish to Device Sync: Go to the Settings App on the iPad. In the pane on the left, scroll down to iCloud.
3. Enter your Apple ID login credentials. Authorization dialogs may appear, many of which you can dismiss. (almost every time you login to your Apple ID, it checks you for security).
4. In the pane on the right, tap the iCloud Drive field. You will see a list of apps that wish to use your iCloud drive to auto-sync information. Be sure that the app icon for CRF, called 'Blading Forms' has a slider set to green. *Reminder: CRF app only uses iCloud for this one feature, Device Sync. Not to store your waivers. See CRF Settings for compatible cloud services.*
5. Open CRF app and enter SETTINGS.  
Scroll down to Device Options, then tap Device Sync Options.
6. Slide to green to Enable Device Sync. Viola! In just a few minutes, depending on your connection speed, your iPads will recall your client waivers on any synced device using that Apple ID/iCloud. Automatically!

## Backing Up / Restoring Device Settings And Restoring Subscriptions

Once you set up your CRF app just the way you want it, with all of your specialist, legal clauses, logos and the tedious legal bits, you want to back that info up so that you won't have to re-enter it for each iPad you add to your studio (for Unlimited Subscription users), or after you upgrade iPads. CRF app will make a tidy file of this info and store it as a backup on your cloud for easy re-download later. *This is wildly popular feature and we encourage you to take the time upfront to use it!*

### Backup your CRF app Settings

Tap the BACKUP DEVICE SETTINGS button. Confirm the backup, and the progress bar will indicate upload. CRF will tell you when it is complete. You will see a file on your cloud with the extension of 'App Settings.enc' Success!

### Restore your CRF app Settings from the cloud to your iPad

Tap the RESTORE DEVICE SETTINGS button.

1. Confirm that you want to restore.
2. In the Cloud Selector, select the cloud service which stores your CRF Settings file.
3. Scroll through the files to choose the 'CRF...App Settings.enc' file you desire.  
A download progress bar will appear and, upon completion, your logo, settings, clauses and health question data points will be restored to your iPad.
4. Enable the slideshow and select the iPad Photos app album containing your slideshow images. Enjoy!

(continued)

### **Restore your *Unlimited Subscription***

If you subscribe to the UNLIMITED SUBSCRIPTION or feature of our apps, you will easily be able to transfer your subscription to a new or upgraded iPad.

1. Tap RESTORE SUBSCRIPTIONS
2. You will be prompted for your Apple ID password.
3. Once entered, your valid subscription will be activated on the new device. You can go to the IN APP PURCHASES screen to verify.

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