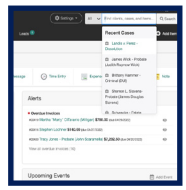
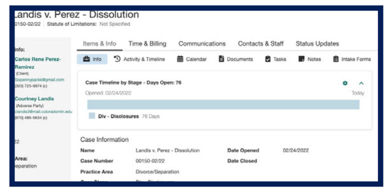
How to Send an Intake Form

This is just a quick instructional guide on sending a form. These can be incredibly helpful once a case has just started or even during a case to ensure all the relevant details are collected. Use them while you are meeting with a client or send them a form as a follow up after a meeting. Follow the steps below to see how to keep that process ticking along! You can also watch this guide here: *joneslawcolorado.com/dashboard*

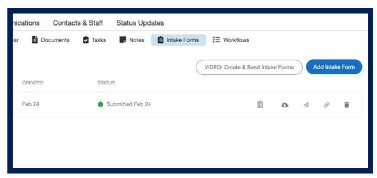
Steps to Follow

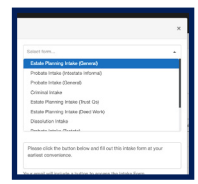
- Head over to the client's case profile and click first on info and then intake.



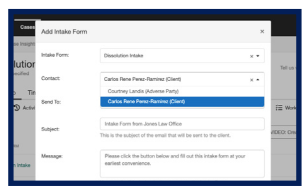


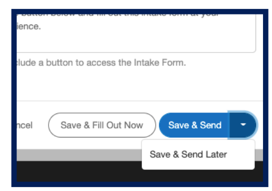
- Click add in the top right and then from the drop down menu chose a form that best fits the case.



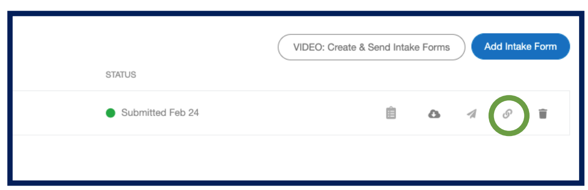


- Ensure you select the correct client to send it to, and then send by email, or fill out then and there!





- Quick note: you can also save the form and copy a link to it and write your own email with the link inside.



- That's that! Good job!

Concluding Thoughts

These forms, while helpful in ensuring we have the same details collected for every case, are actually the backbone of our document automation process. For every document you generate that automatically fills in details from the client profile these forms put those details in the profile in the first place. It makes them incredibly important and something that we need to have every client complete - or complete for them.