

**Leaflet<sup>®</sup> Platform<sup>™</sup>**  
**SHAREPOINT**  
**SETUP & USER GUIDE**

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## **1 LEAFLET INTEGRATION WITH SHAREPOINT**

Leaflet Corporation enables law firms, practice groups or individual lawyers to take all or part of the questionnaire that drives any Document and publish it out to clients. Each questionnaire published out in this fashion is called a “Leaflet.” Such Leaflets are mainly auto filled and available for use with limited efforts required thereafter. Any of the clients who have been granted access to a Leaflet can use it and submit their Documents and then generate as many versions as required for any Document.

Leaflets are flexible, mobile interviews that you extract from your automated forms and share with anyone who might request documents from you. Leaflets are easy to create and customize.

Leaflet leverages technology to create automated templates (No Programming Required), and Clause Libraries for document drafting. Leaflet enables collaboration between teams and clients with Microsite Portals, configurable workflows, and automated approval processes. Leaflet’s Document Automation Platform fits seamlessly into existing environments and integrates into leading DM, CRM, CLM, and eSignature solutions.

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## **2 WORKING THOUGH LEAFLET & SHAREPOINT**

Documents can be moved from Leaflet platform to SharePoint by working though different sites. We will learn how to do so in the below sections.

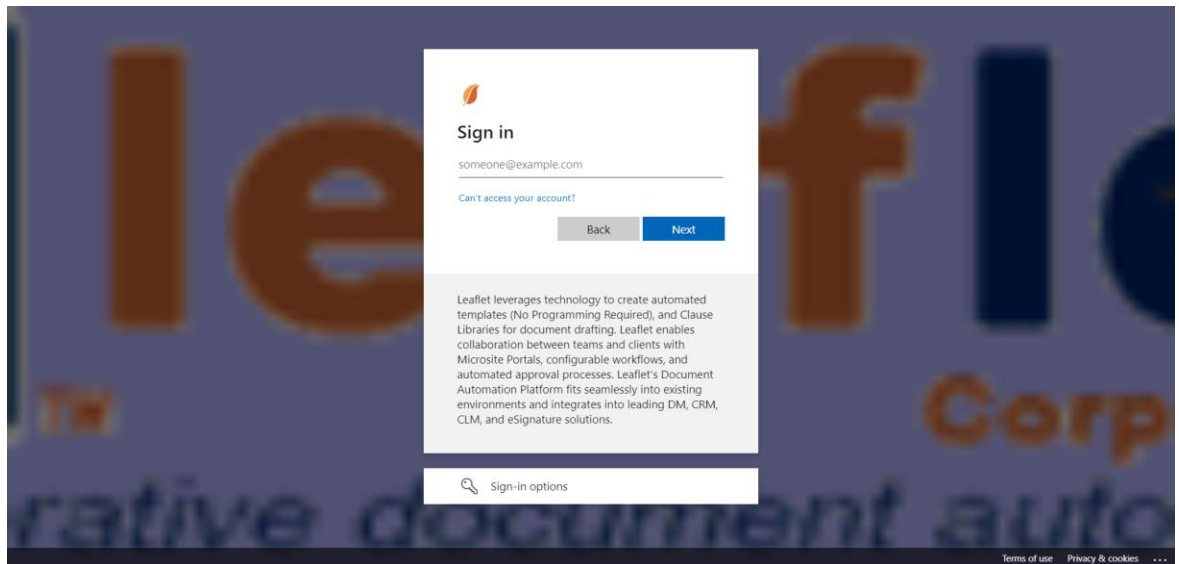
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### **2.1 SHAREPOINT LOGIN**

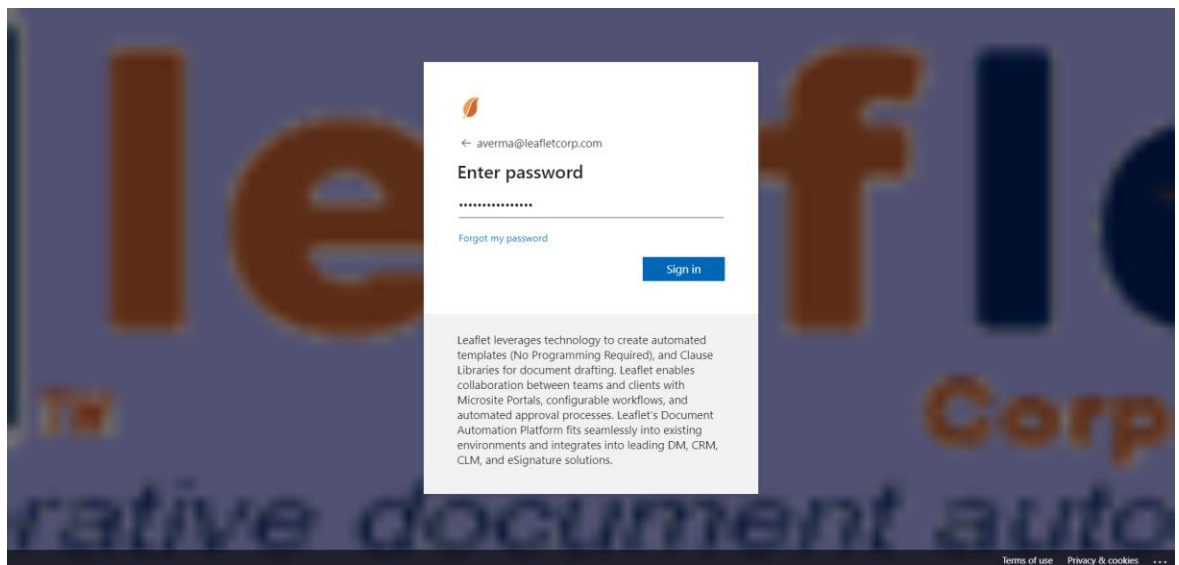
Log in SharePoint from:

<https://leafletcorp0.sharepoint.com/>

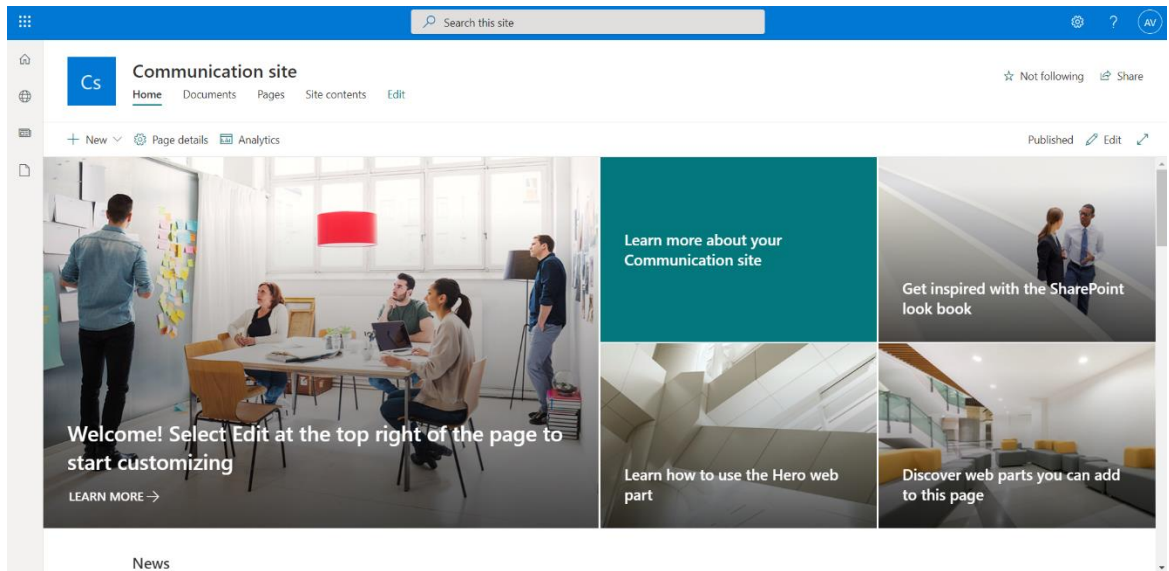
Provide Email Address and select Next.



Then enter Password and hit Sign in.



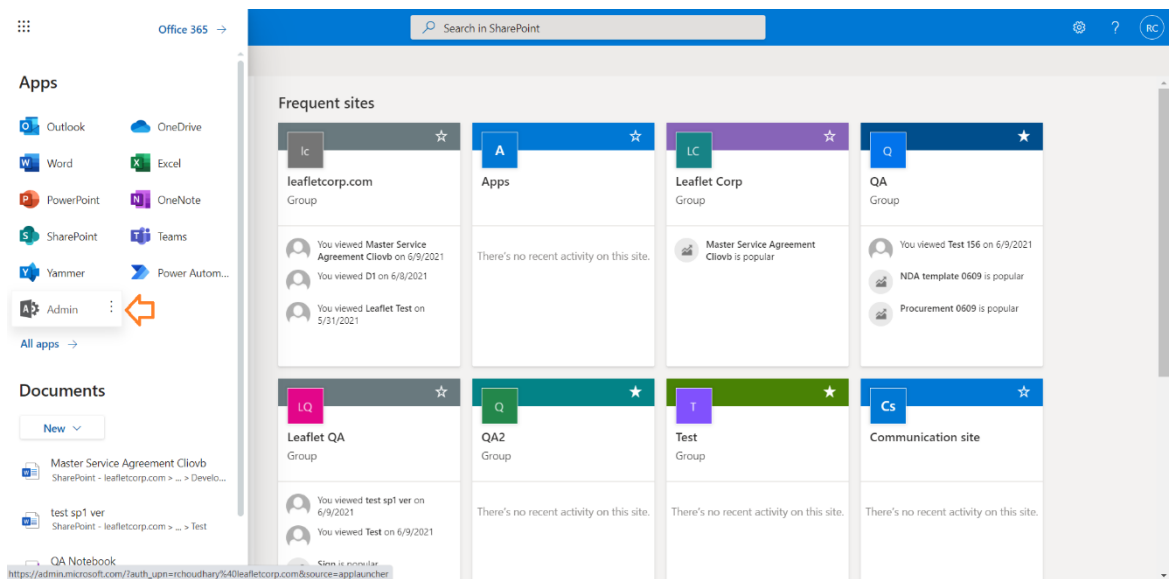
After logging in the screen appears like below:



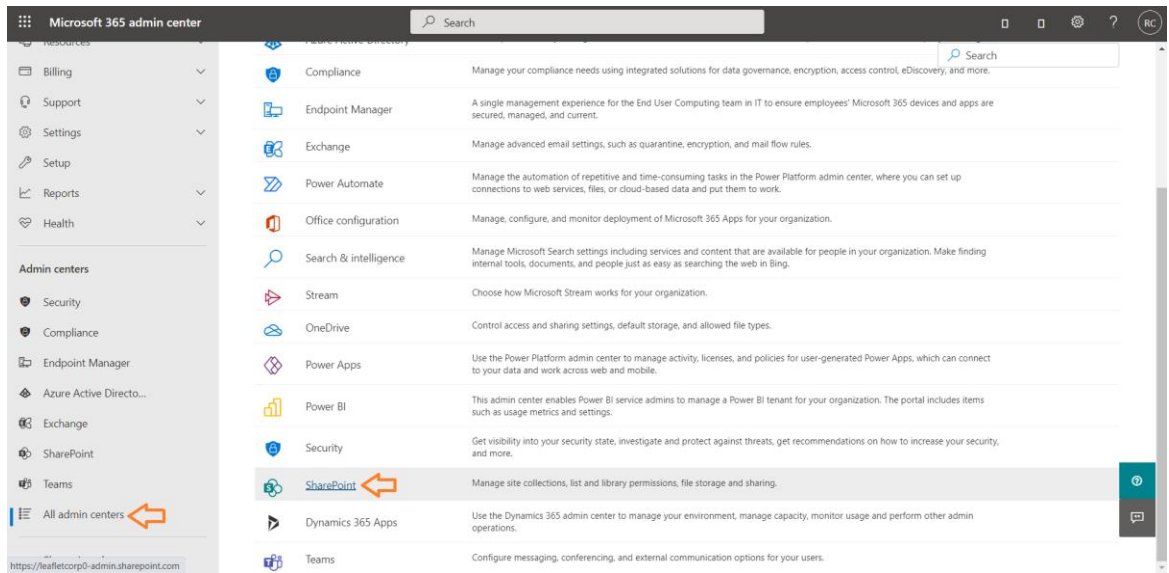
## 2.2 SHAREPOINT ADMIN SETUP

To integrate Leaflet and SharePoint, admin setup is required. Follow below steps to setup:

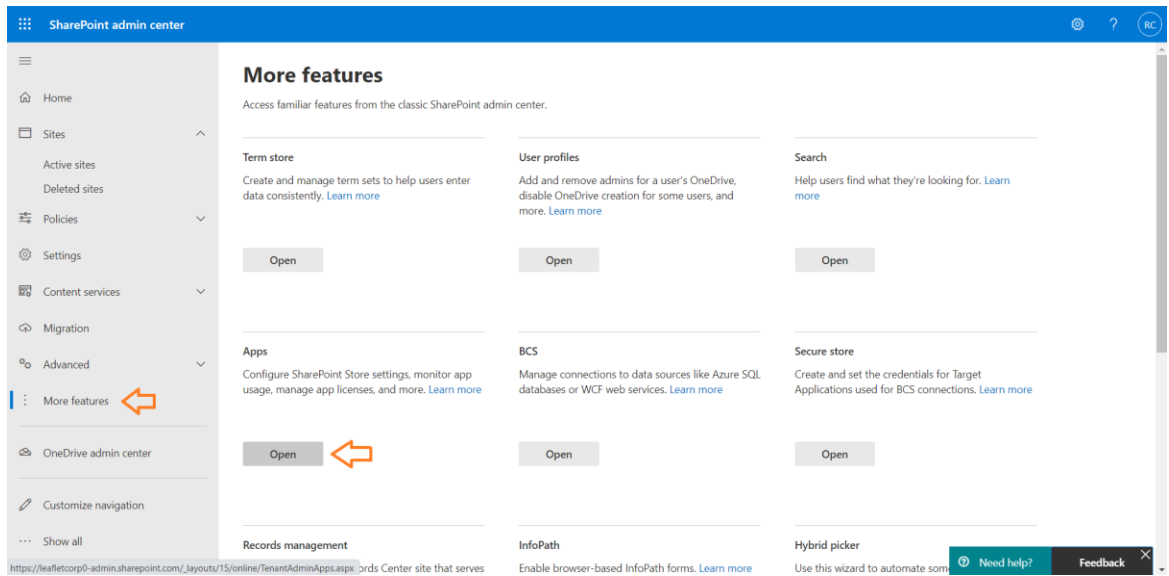
### 1. Open Admin from SharePoint Home page.



### 2. This takes you to Microsoft 365 admin center. There from menu drop down select "All admin centers". From All admin centers select "SharePoint" admin center.



3. In SharePoint admin center from menu drop-down select “More Features”. And from More Features window open “Apps”.



4. Now select “App Catalog”.

## Apps

### App Catalog

Make apps available to your organization and manage requests for apps. An app catalog is required to disable Store purchases for end users.

### Purchase Apps

Purchase apps from the SharePoint Store.

### Manage Licenses

Manage licenses for apps purchased from the SharePoint Store.

### Configure Store Settings

Manage app acquisition settings including turning off purchases for end users in the SharePoint Store.

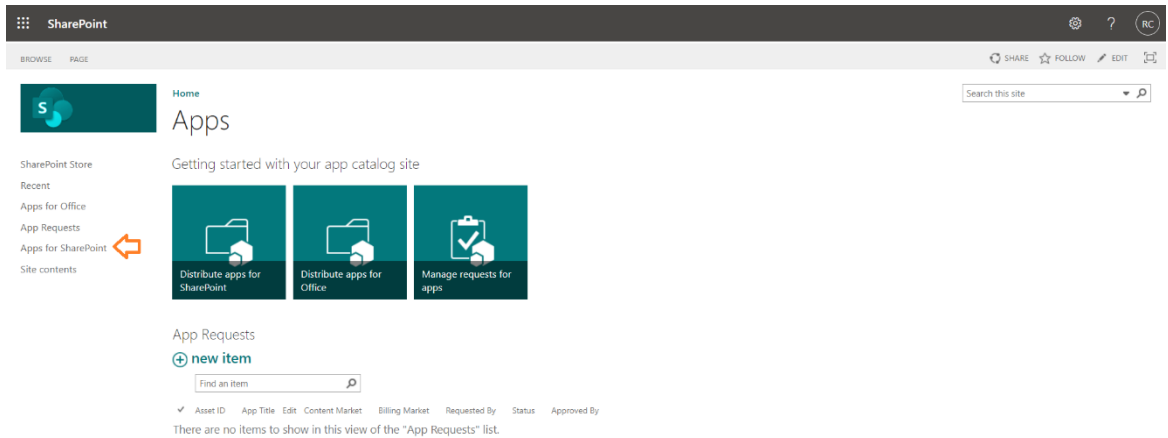
### Monitor Apps

Track usage of applications and review errors.

### App Permissions

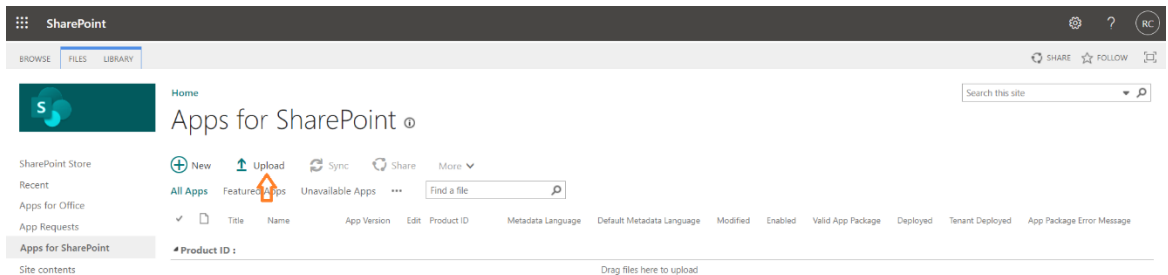
Manage app access to this tenant.

## 5. In App Catalog from left panel select “Apps for SharePoint”.

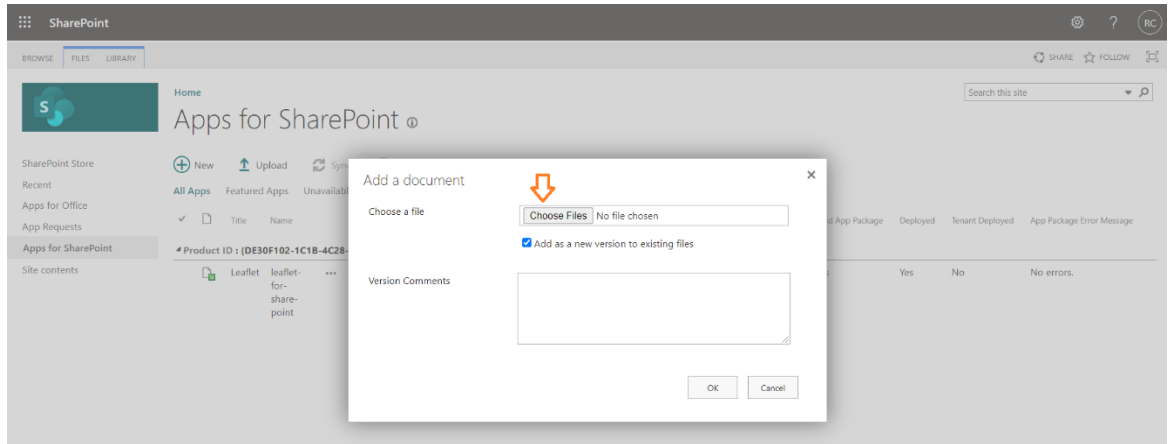


The screenshot shows the SharePoint App Catalog interface. The left-hand navigation pane is visible, with "Apps for SharePoint" selected and highlighted by an orange arrow. The main content area displays "Getting started with your app catalog site" with three tiles: "Distribute apps for SharePoint", "Distribute apps for Office", and "Manage requests for apps". Below this, there is an "App Requests" section with a "new item" button and a search bar. A table header is visible at the bottom, including columns for "Asset ID", "App Title", "Edit", "Content Market", "Billing Market", "Requested By", "Status", and "Approved By".

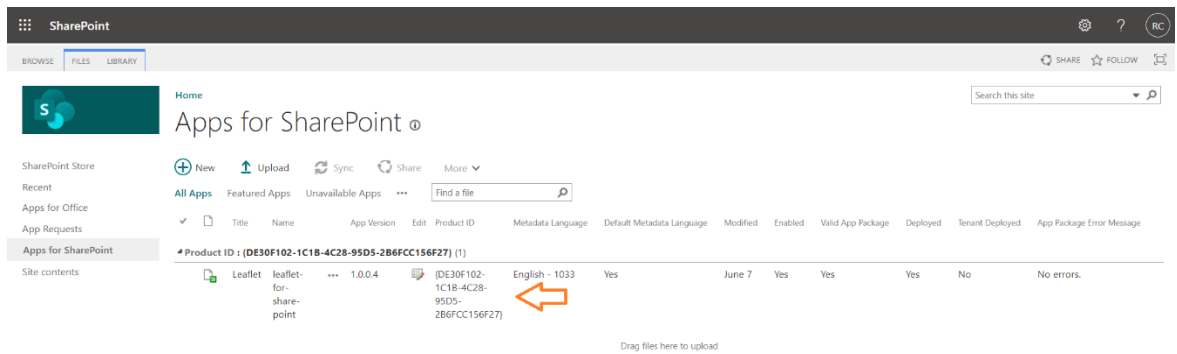
## 6. Now Upload the SharePoint package file shared. Select “Upload”.



The screenshot shows the SharePoint App Catalog interface with the "Upload" button highlighted by an orange arrow. The left-hand navigation pane shows "Apps for SharePoint" selected. The main content area displays "All Apps" with a search bar and a table header. The table header includes columns for "Title", "Name", "App Version", "Edit", "Product ID", "Metadata Language", "Default Metadata Language", "Modified", "Enabled", "Valid App Package", "Deployed", "Tenant Deployed", and "App Package Error Message". Below the header, there is a "Product ID" field and a "Drag files here to upload" area.

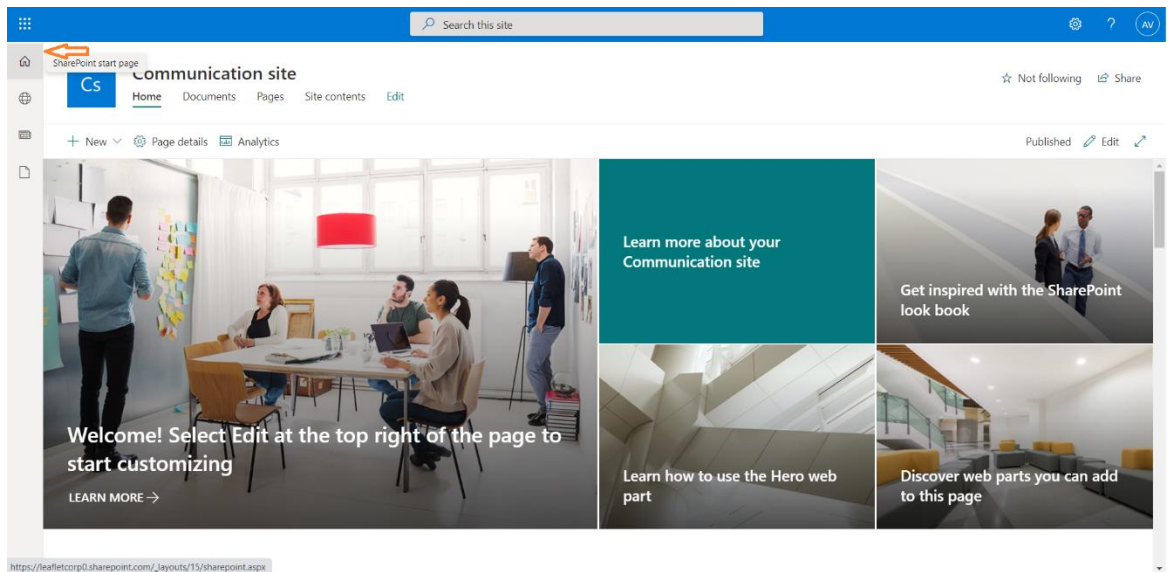


7. Now your SharePoint package installation is done. And you are all set to work.



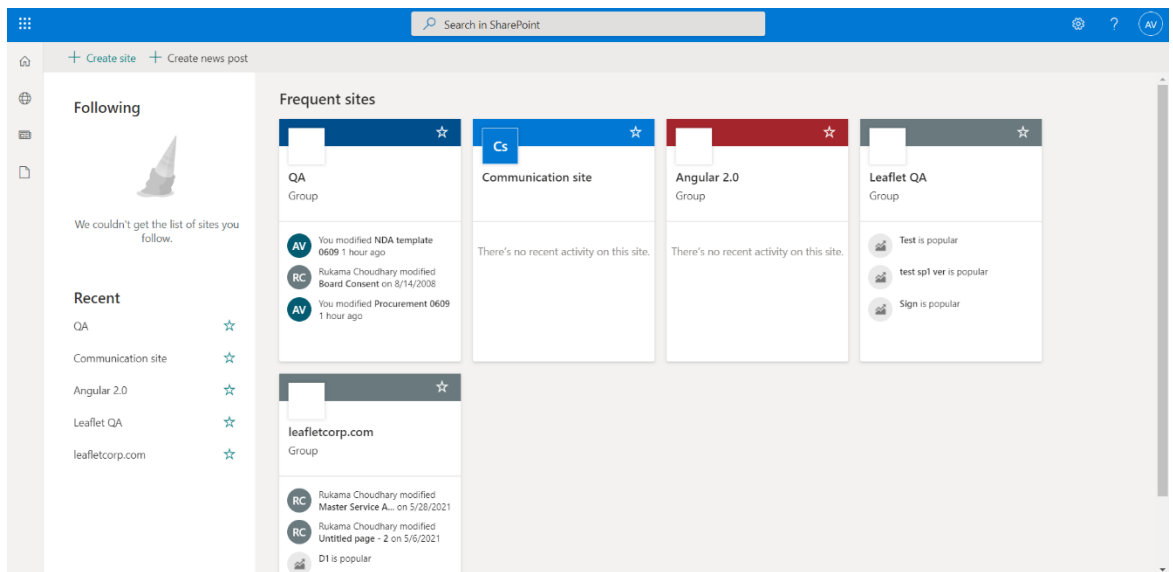
## 2.3 SITE CREATION

1. Go to SharePoint start page.

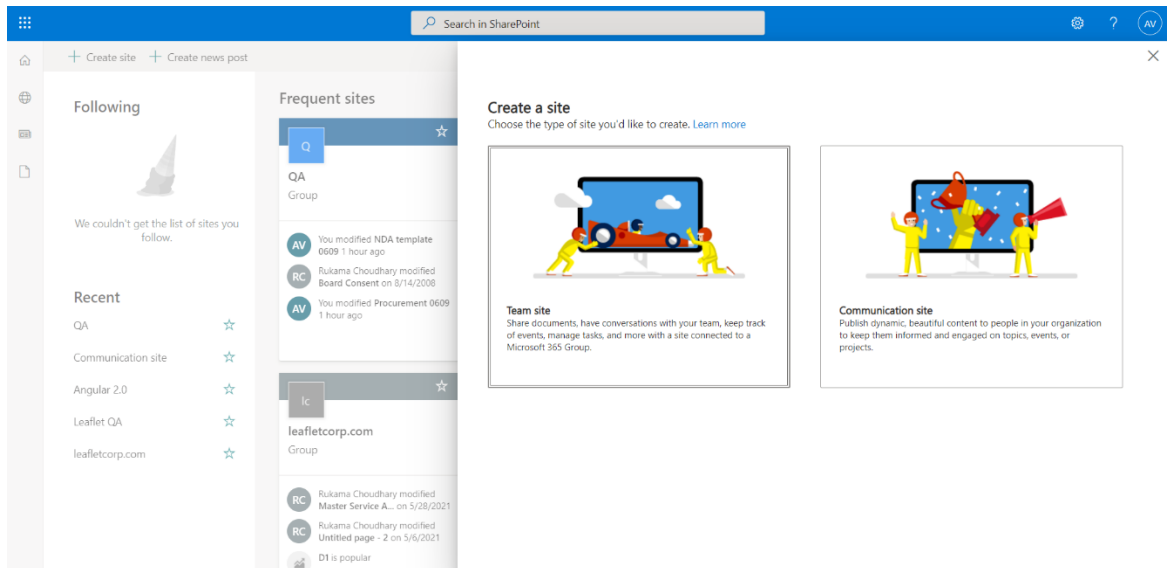




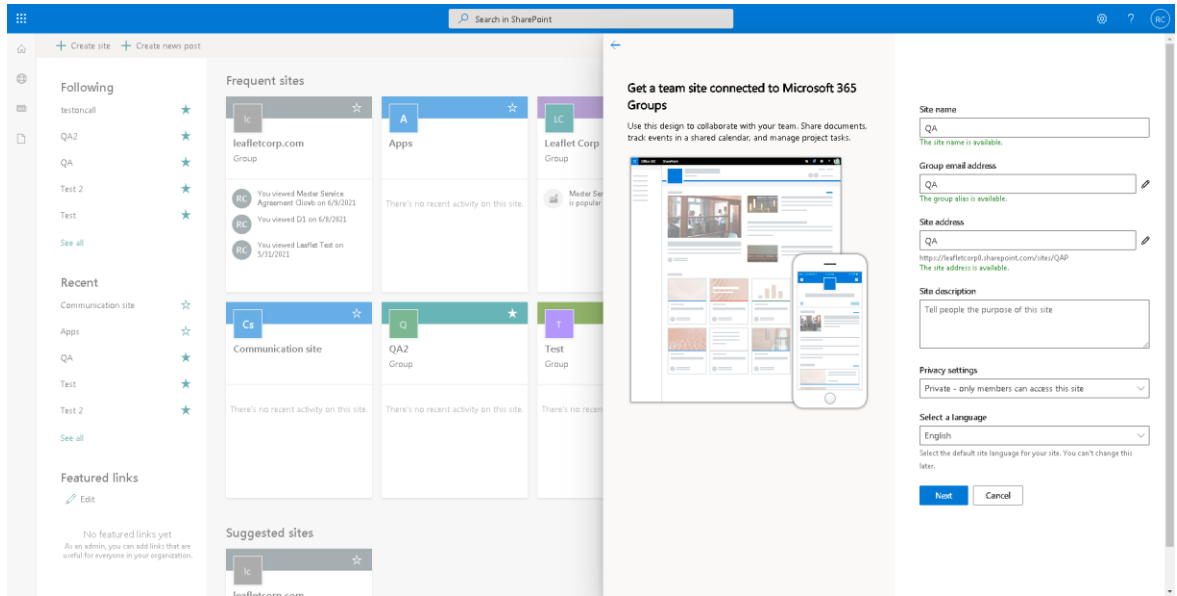
## 2. On start page click on “+Create Site”.



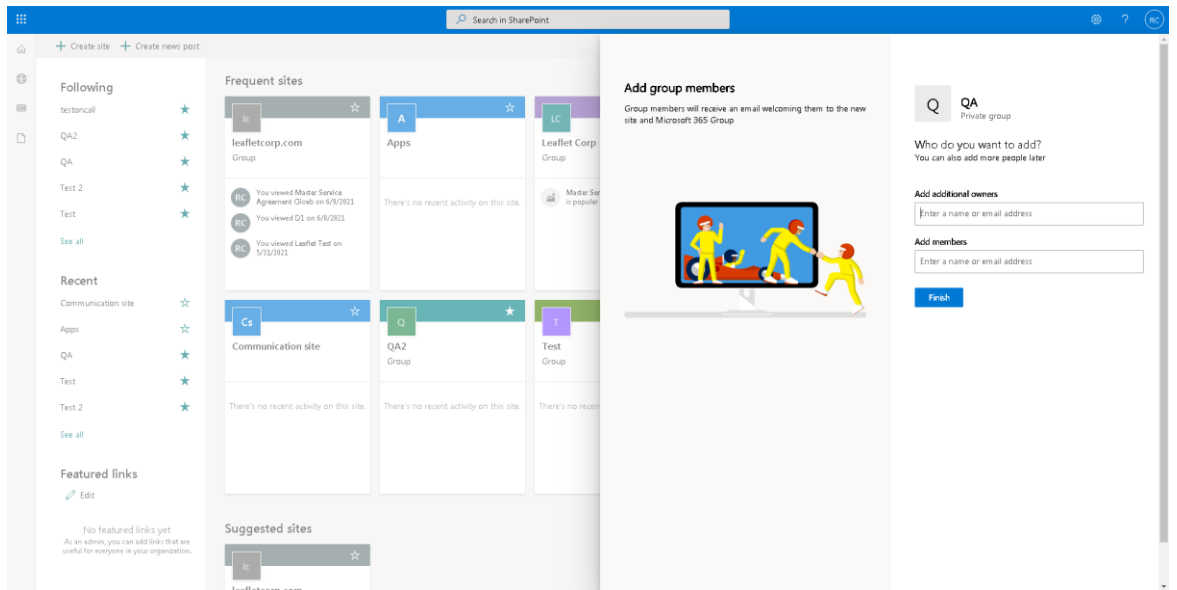
## 3. Select Team site.



## 4. Provide all the details and hit Next.



5. Add additional owners/ members and select Finish.

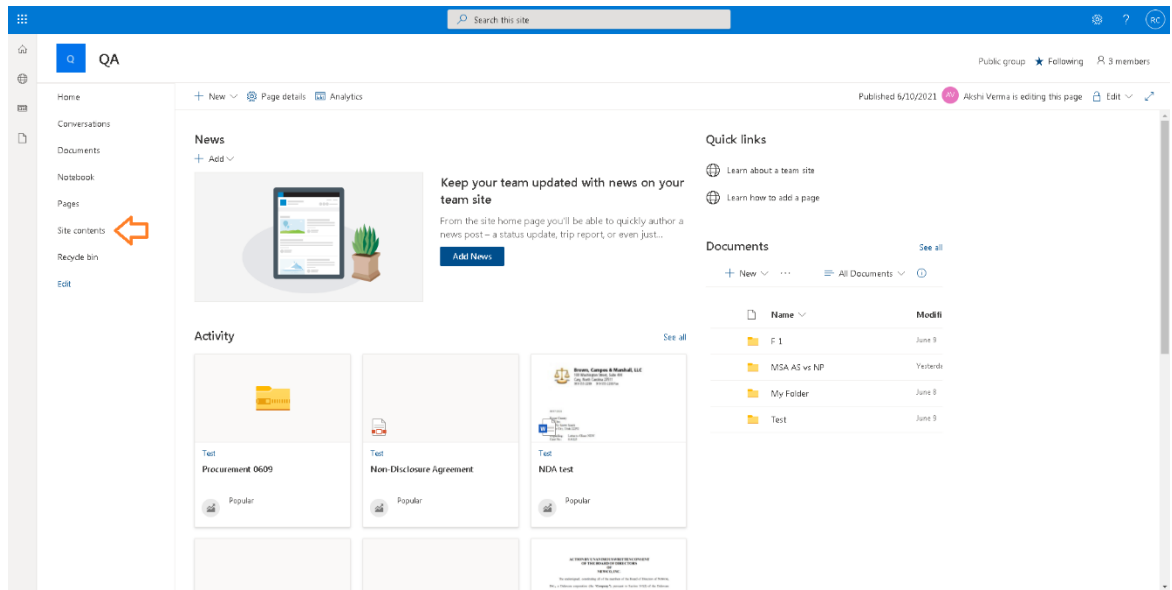


6. Once created it is available on SharePoint start page.

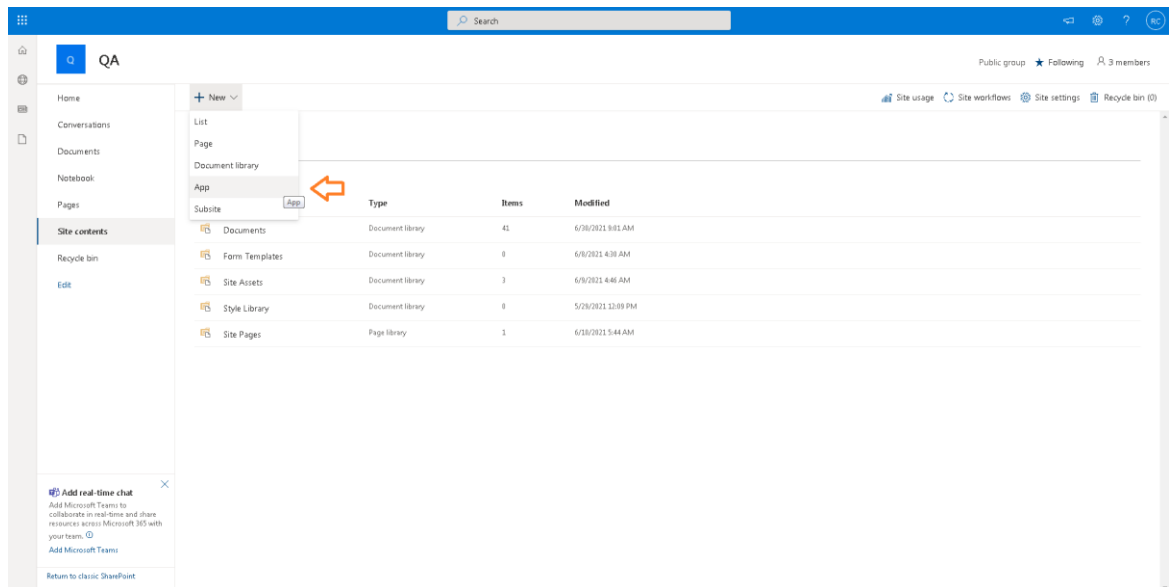
## 2.4 SETUP LEAFLET LINK

Open the site created (as mentioned in above section). Now follow the below points:

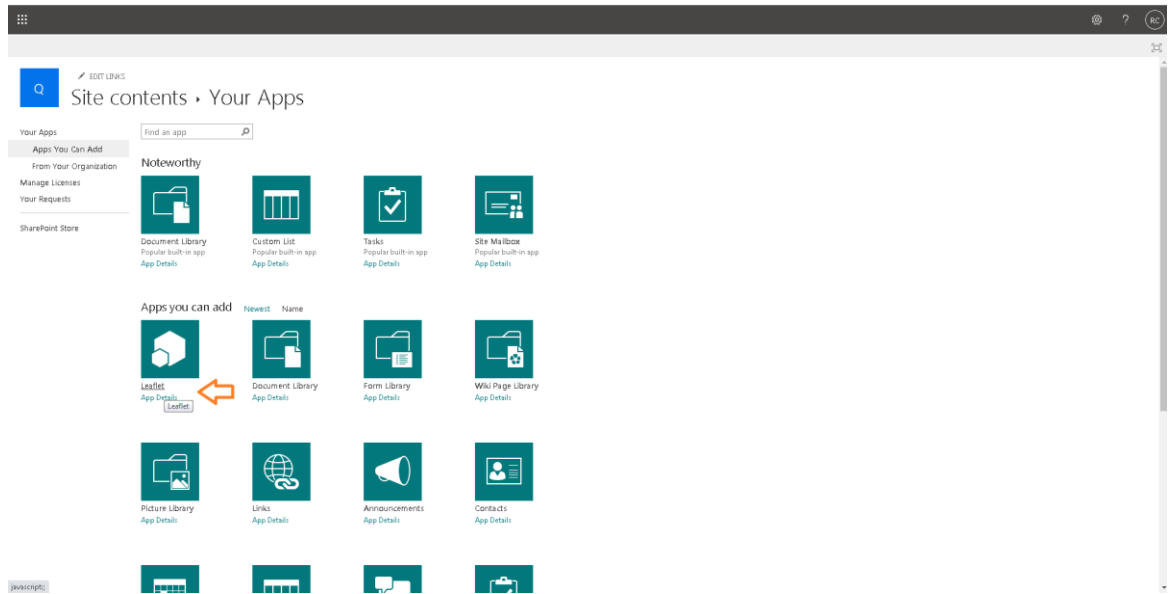
1. In this Site go to "Site Contents".



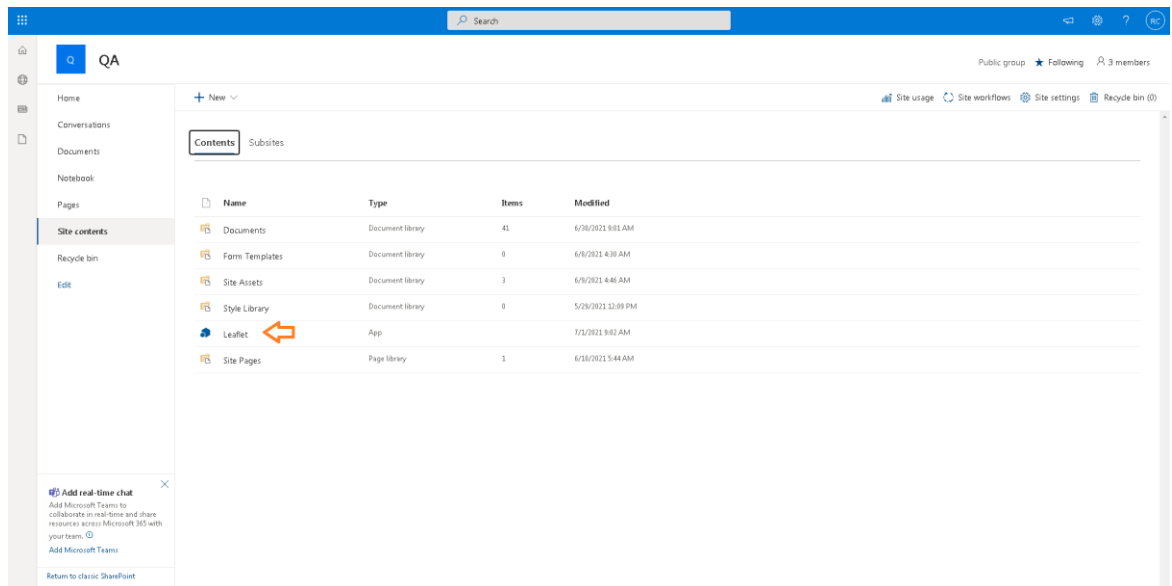
2. Select New. From New drop-down menu select “App”.



3. Select Leaflet App.



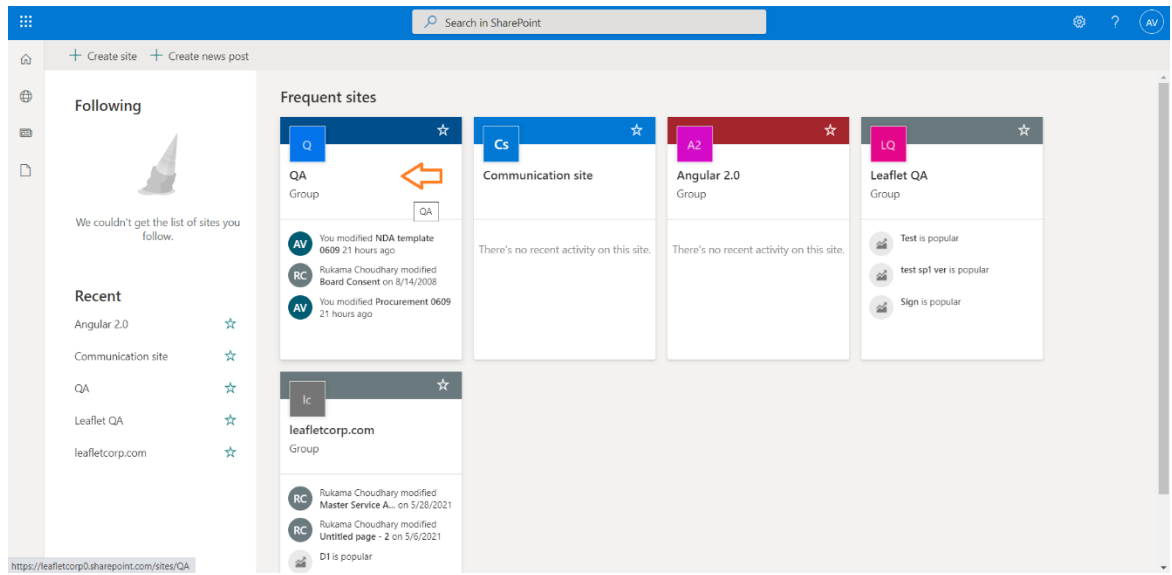
- Refresh the screen. Then you can see an active Leaflet app is added to Site Contents.



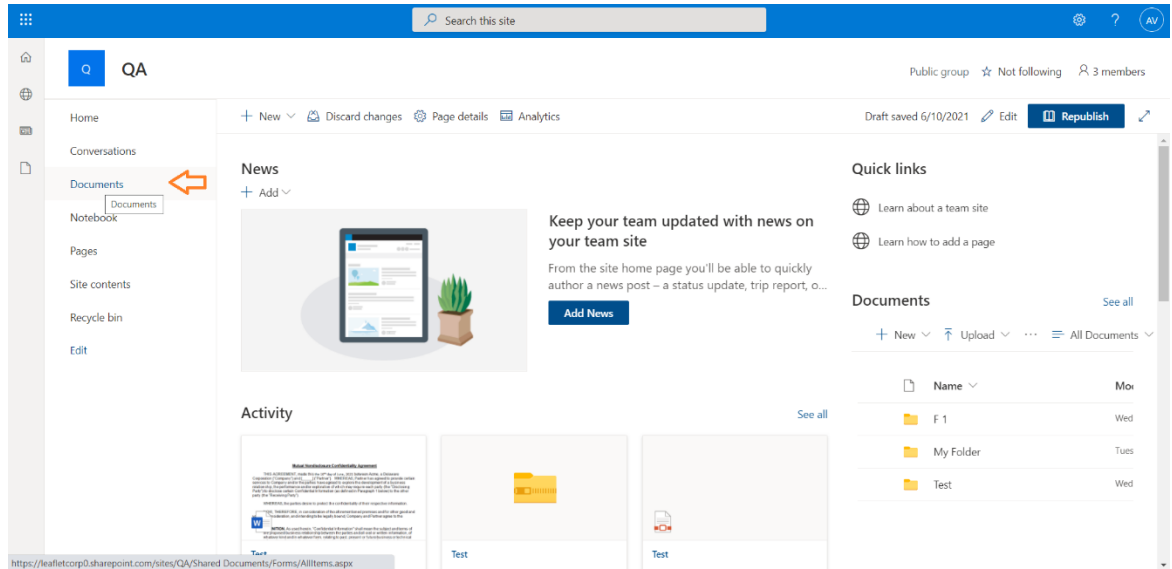
## 2.5 CREATE FOLDER

Once your site is created, create a folder in Documents of your site. Follow below steps.

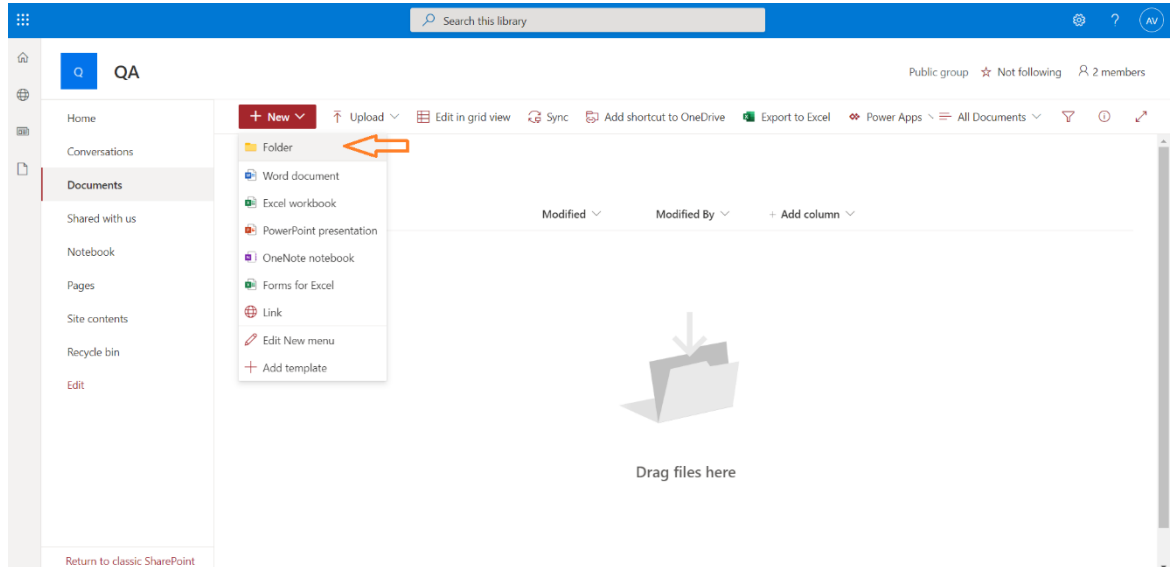
- Click on your site box on SharePoint start page.



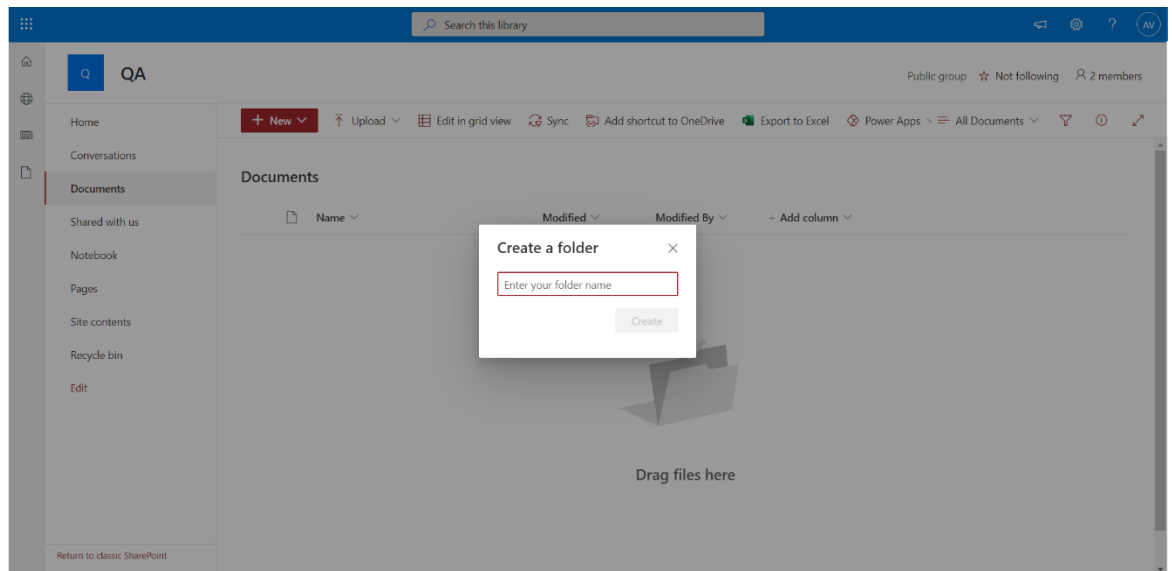
## 2. Go to the Documents of your site.



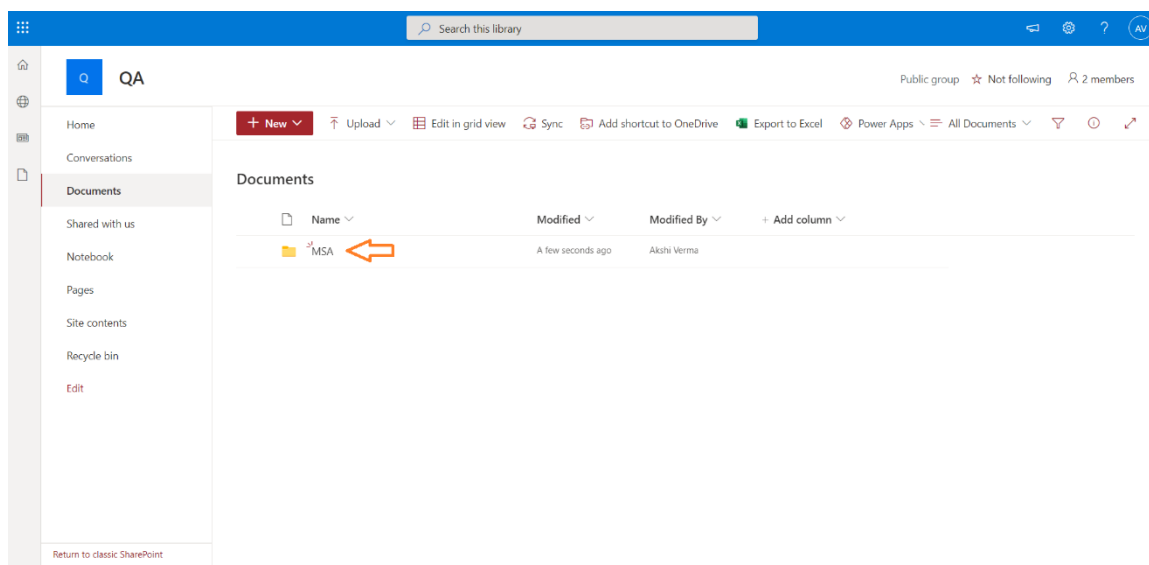
3. In Documents create a folder by clicking on “+New” drop-down menu.



4. Provide your folder name and hit Create.



5. Your folder is ready and is available in documents now.



## 2.6 ACCESS LEAFLETS

Various documents can be created under Leaflets. At one place all the Leaflets can be viewed. Basically we need to fill a questionnaire based on the document and such is then generated and a ready agreement is obtained and is available on SharePoint. Execution through this is easy, concise and time saving.

Thereafter, concise list is available for user. Hence manages all the documents, from their start till end. And also enables to keep a regular check in a much easy and concise form.

Leaflets through SharePoint can be accessed via the following tabs:

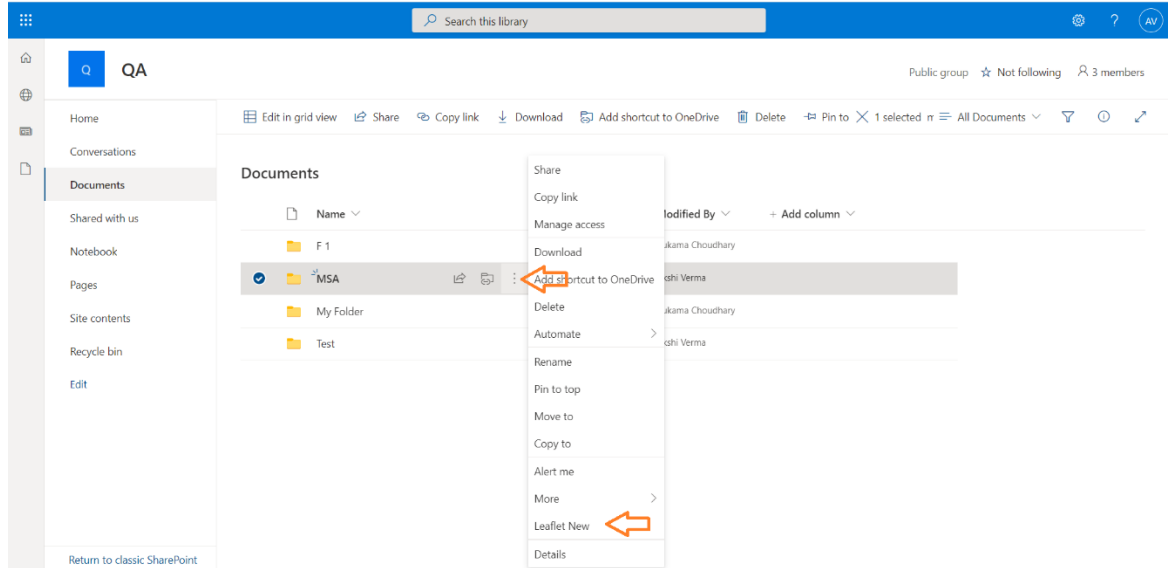
1. Leaflet New: Which is a new document generation.
2. Leaflet Edit: To edit the submitted agreement on basis of questionnaire.
3. Leaflet Customize: To Customize your agreement live wherein all the changes you are making can be seen live on your agreement.

### 2.6.1 LEAFLET NEW FROM SHAREPOINT

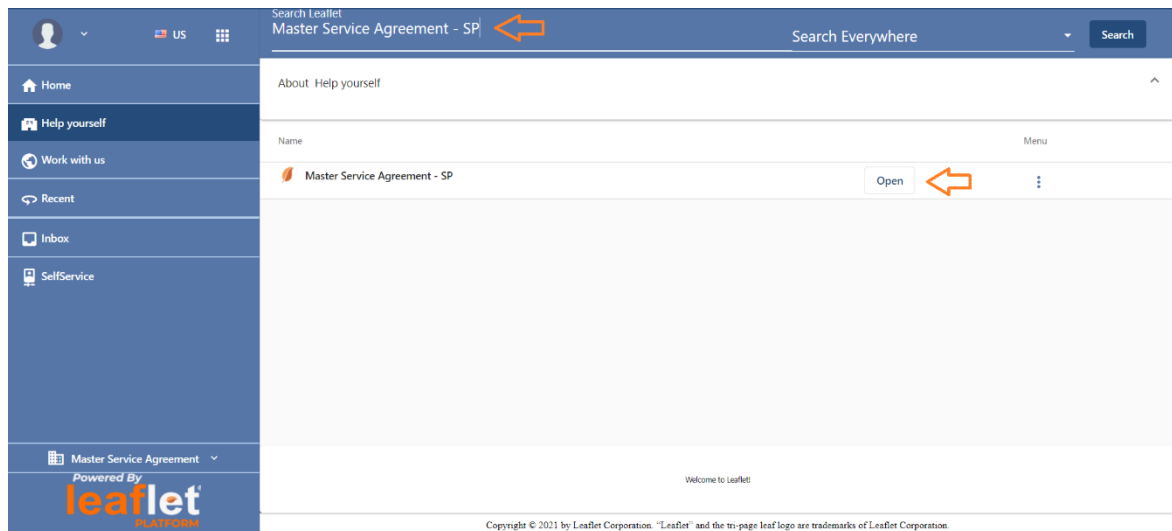
In the [SharePoint](#) we have a button of “Leaflet New” click on this button. This redirects to Microsite Module (where we have all questionnaires ready

to be filled in and get a full prepared document) on Leaflet application. This is to get your new document ready. Follow the below steps to export/upload from Leaflet Application to SharePoint:

1. Once your folder is created in Section [2.3](#), from your folder drop down menu select Leaflet New button.

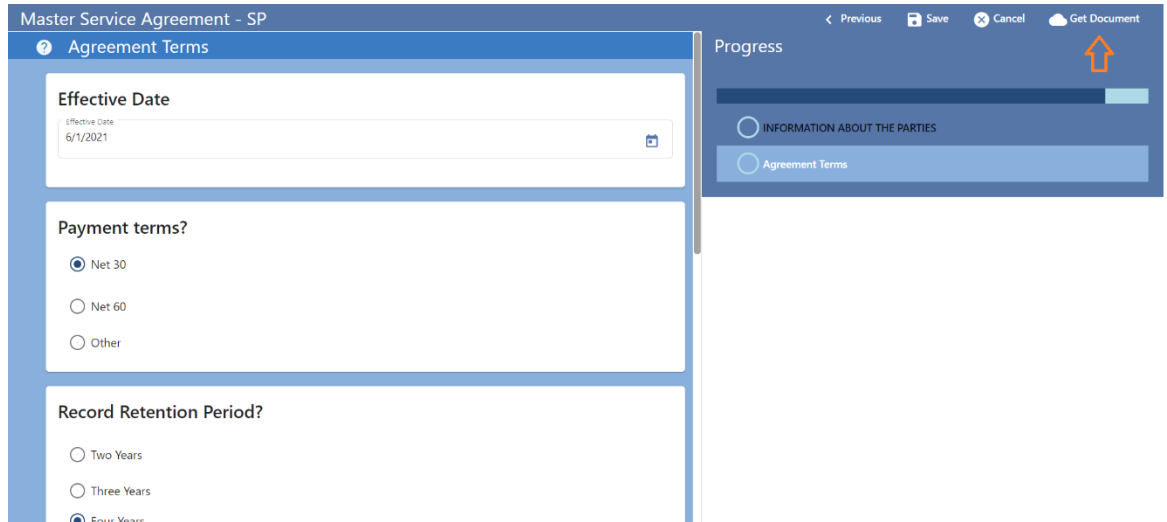


2. This takes us to Microsite Module on Leaflet application. Which appears as below. You can type in your Leaflet/document name on top search bar (as shown in below image)/ scroll to your document and hit open provided next to Leaflet/document name.



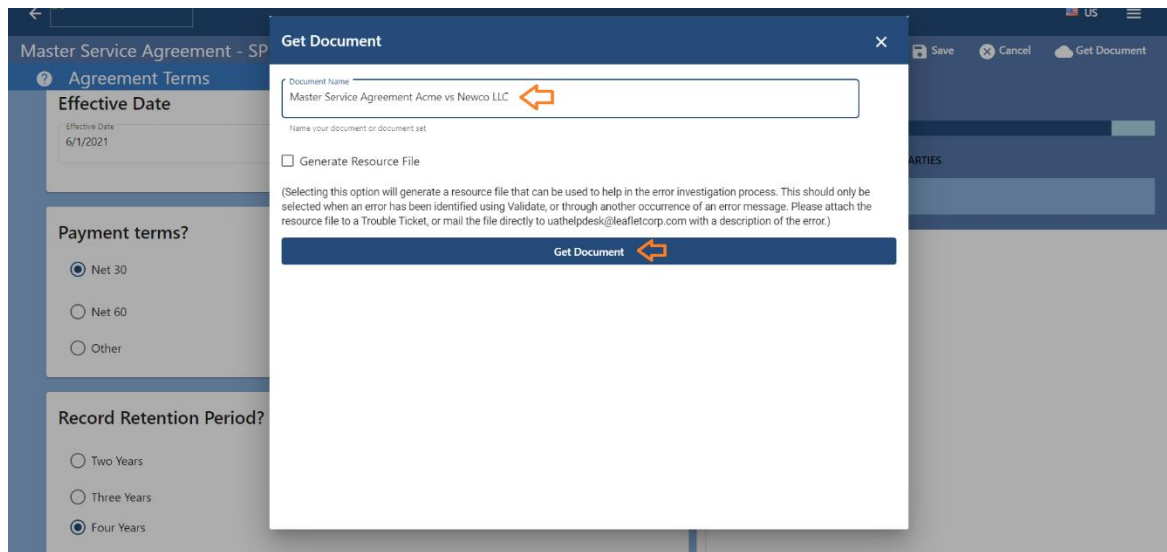


3. Your document questionnaire appears. Fill in the questionnaire fields. Once done hit Get Document button on top right.



The screenshot shows a web form titled "Master Service Agreement - SP" with a "Progress" bar on the right. The form is divided into sections: "Agreement Terms", "Effective Date", "Payment terms?", and "Record Retention Period?". The "Effective Date" field is filled with "6/1/2021". Under "Payment terms?", the "Net 30" radio button is selected. Under "Record Retention Period?", the "Four Years" radio button is selected. The "Progress" bar shows "INFORMATION ABOUT THE PARTIES" as the first step and "Agreement Terms" as the current step. At the top right of the form, there are buttons for "Previous", "Save", "Cancel", and "Get Document".

4. In Get Document pop up window provide document name and hit Get Document button.



The screenshot shows the "Get Document" pop-up window overlaid on the questionnaire form. The window has a title bar with "Get Document" and a close button. It contains a "Document Name" field with the text "Master Service Agreement Acme vs Newco LLC" and a red arrow pointing to it. Below the field is a checkbox labeled "Generate Resource File" which is unchecked. A note below the checkbox reads: "(Selecting this option will generate a resource file that can be used to help in the error investigation process. This should only be selected when an error has been identified using Validate, or through another occurrence of an error message. Please attach the resource file to a Trouble Ticket, or mail the file directly to uahelpdesk@leafletcorp.com with a description of the error.)". At the bottom of the window is a "Get Document" button with a red arrow pointing to it. The background form is dimmed.

5. Once the process is complete the document is ready to Preview, Download, Email, View Summary, Send for e-Sign and Customize.

[← Back to library](#)

Your Documents are Ready [View Summary](#) [Send for eSign](#) [Customize](#)

Files

 Master Service Agreement Acme vs Newco LLC

[Download](#) [Email](#) [Preview](#)

6. Click on “Back to Library”. Submitted contract is now available

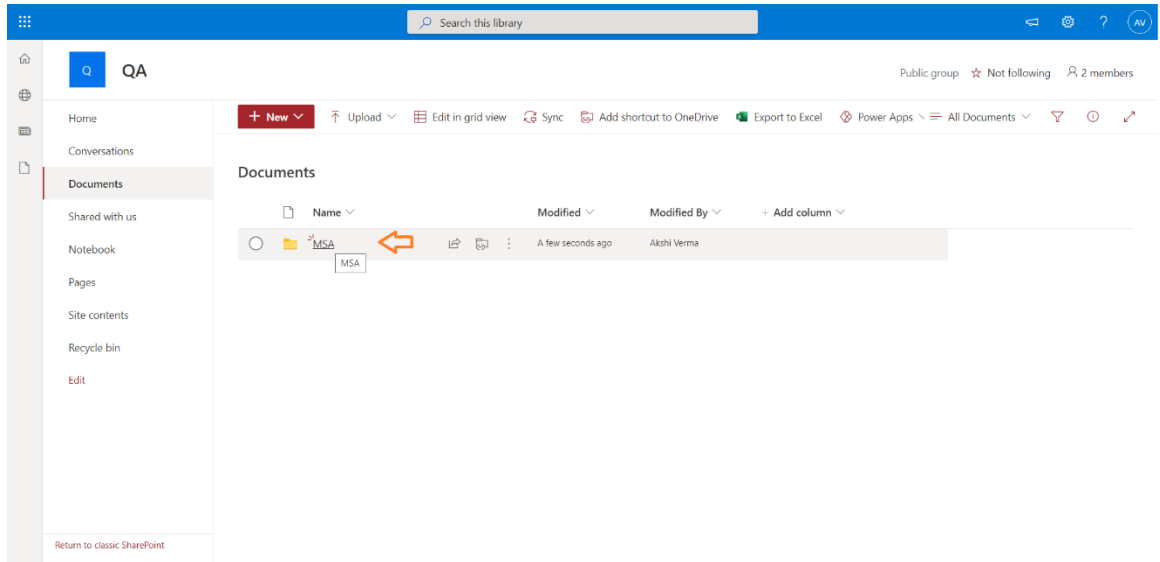
in Recent on [Leaflet Applications](#) and  
in your Folder on [SharePoint](#).

Go to Recent Queue.

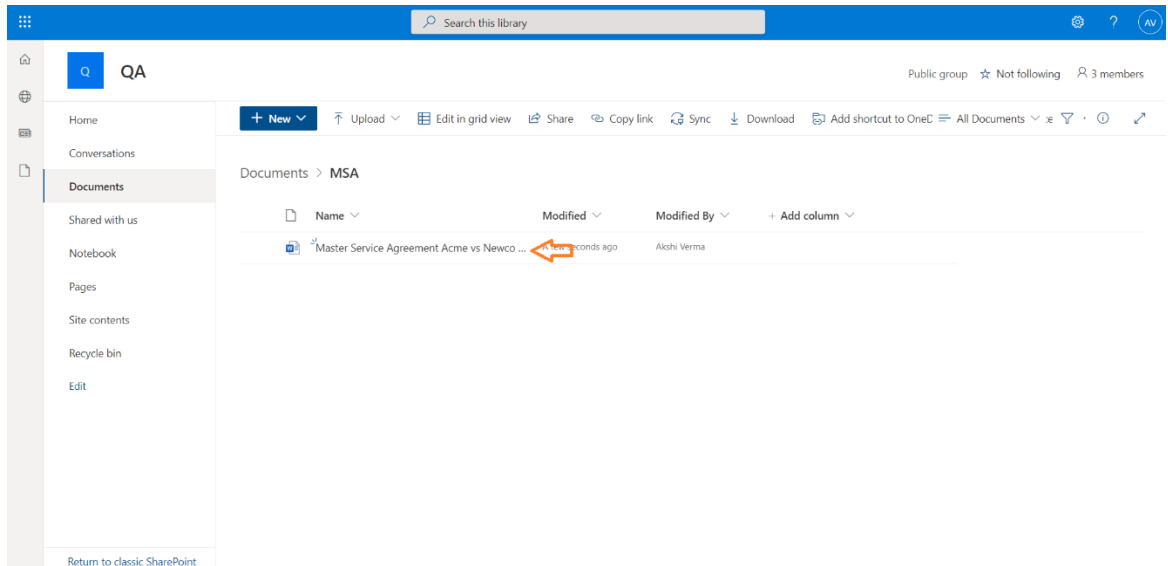


Document Name	Status	Menu
 Master Service Agreement Acme vs Newco LLC 	Assembled	⋮
 NDA template 0609 v2	Assembled	⋮
 MSA ZIP	Assembled	⋮
 MSA PDF	Assembled	⋮

On SharePoint, go to

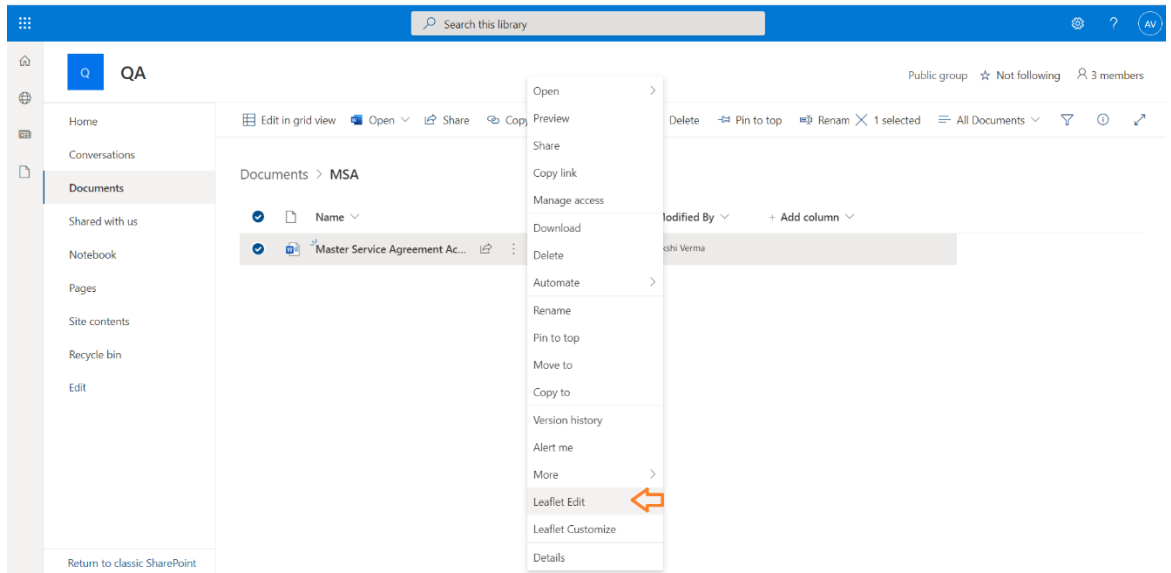


Open your folder, document is ready and available here.

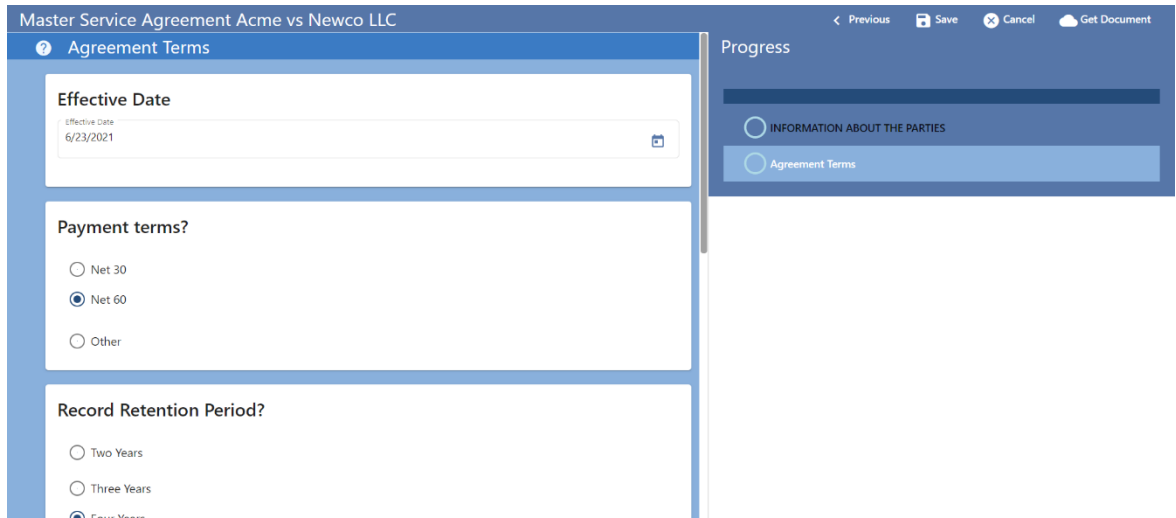


## 2.6.2 LEAFLET EDIT FROM SHAREPOINT

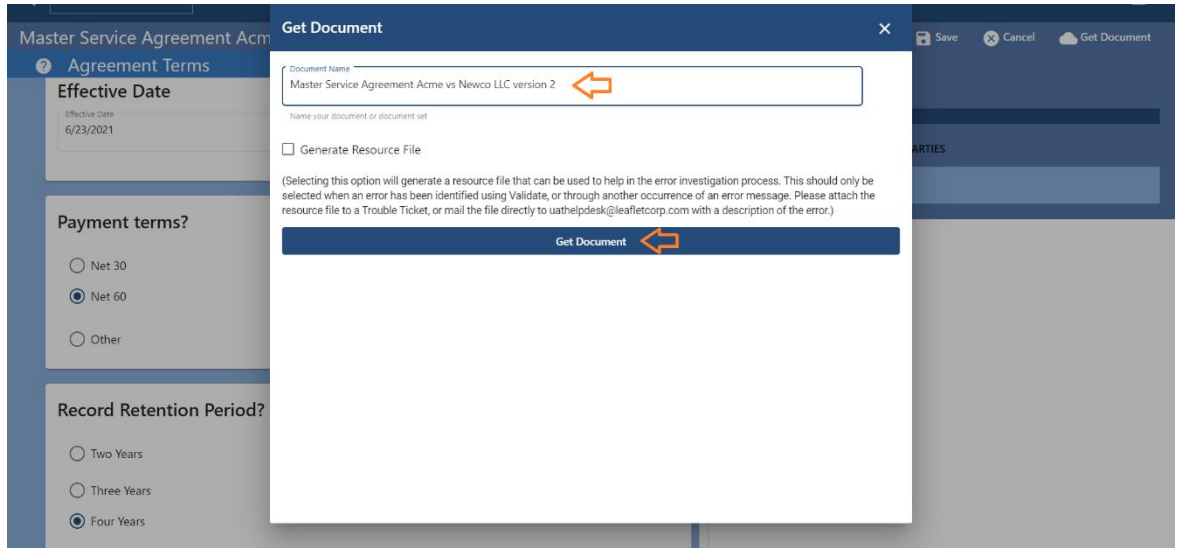
1. Click on the context menu of your document. Select Leaflet Edit.



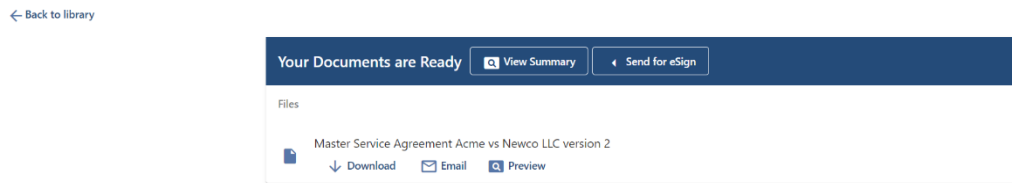
2. This redirects to Leaflet Application, Microsite Module/ Portal. And edits your document questionnaire. Make all the necessary changes required.



3. Hit Get Document. In Get Document pop up window again hit Get Document button.



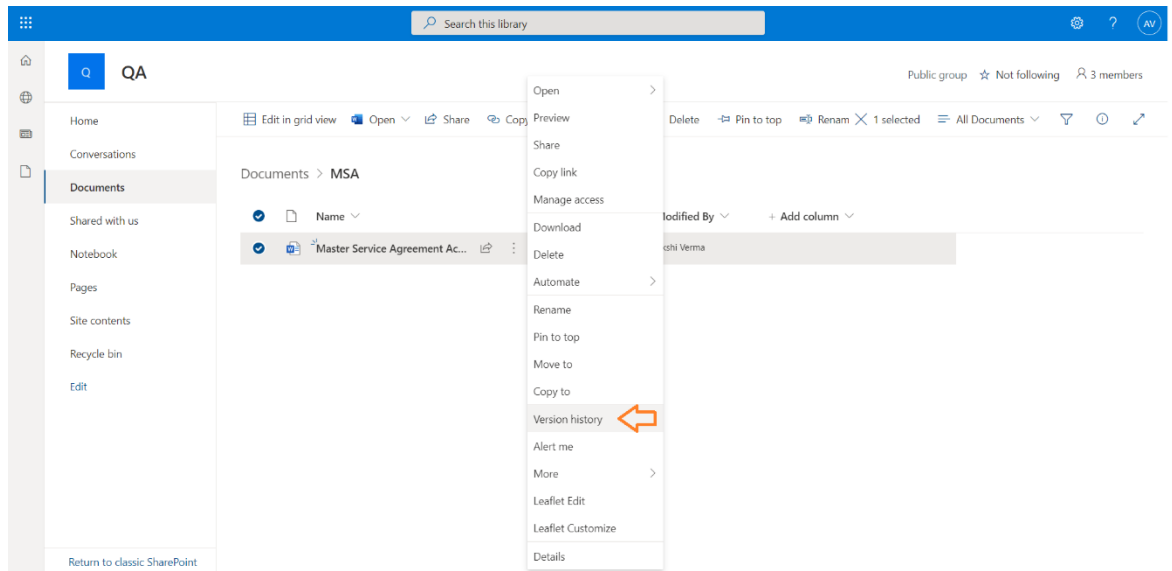
4. Once the process is complete the document is ready to Preview, Download, Email, View Summary, Send for e-Sign and Customize.



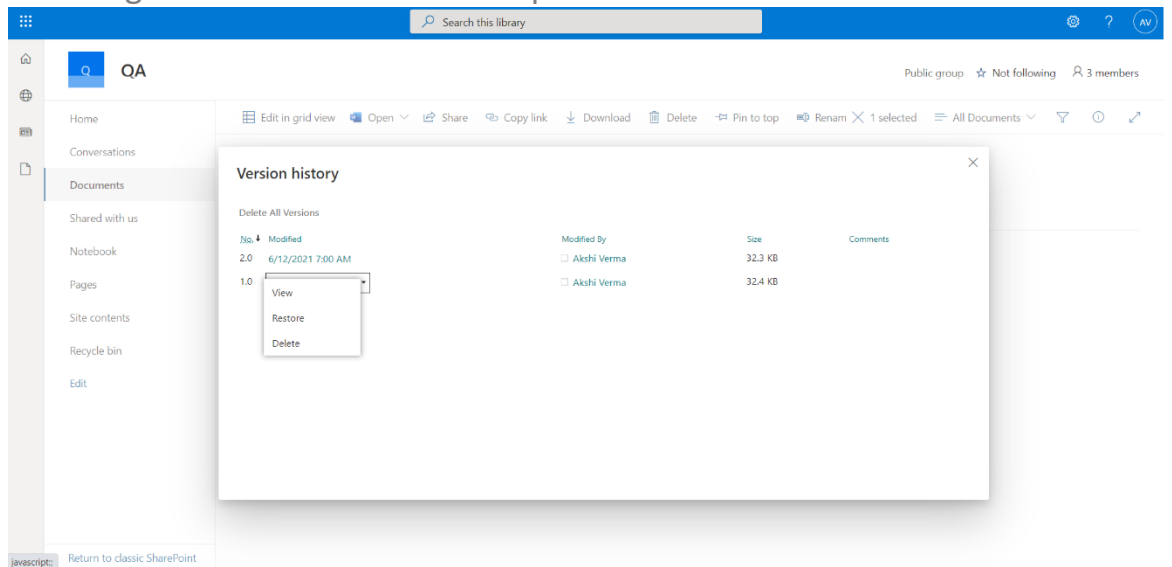
#### 2.6.2.1 VERSION HISTORY

After submitting the document through Leaflet Edit, as it is edited version so now user can see previous and new versions both on SharePoint. (i.e. all the versions)

1. Open your folder on SharePoint. There from your context menu drop-down of your document, select Version history.

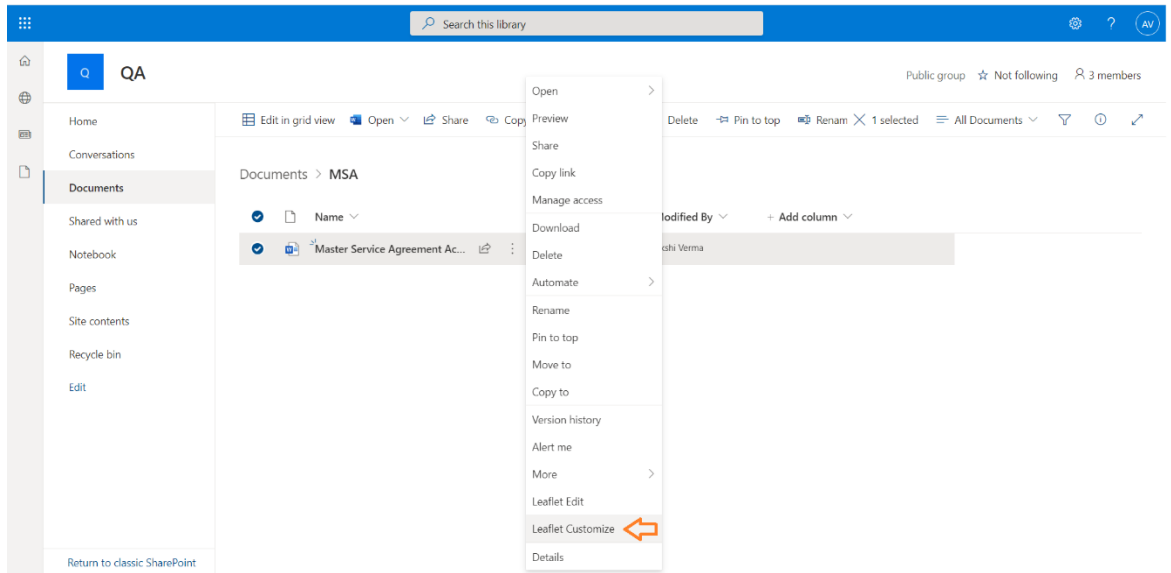


2. All the versions are available here. Previous version can be Restored by selecting Restore from version drop-down menu.

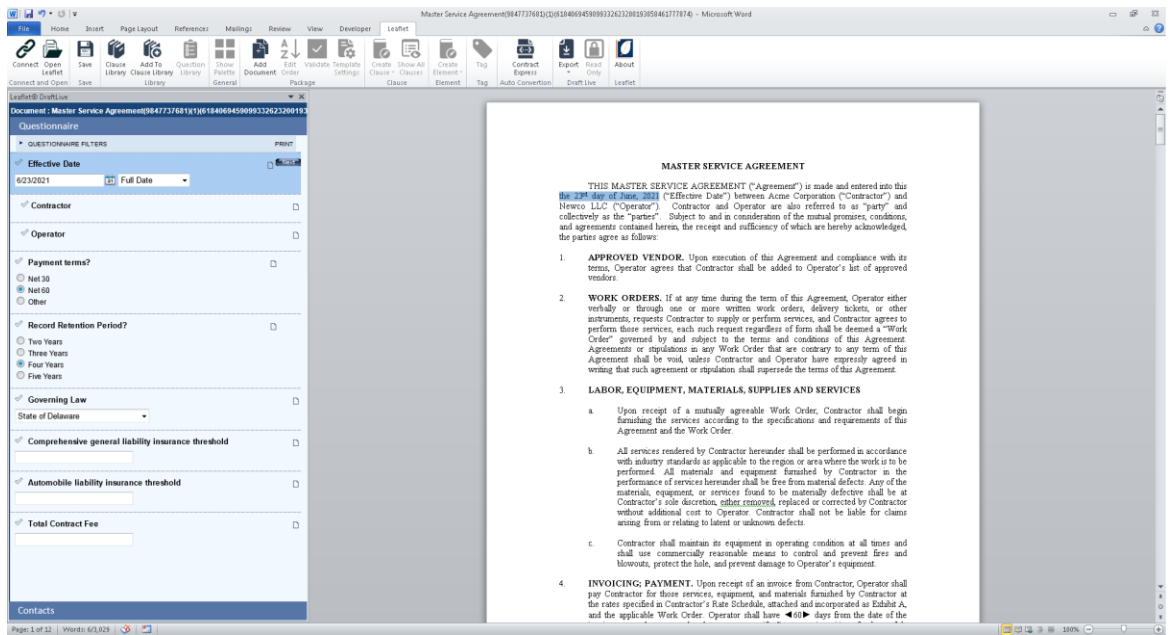


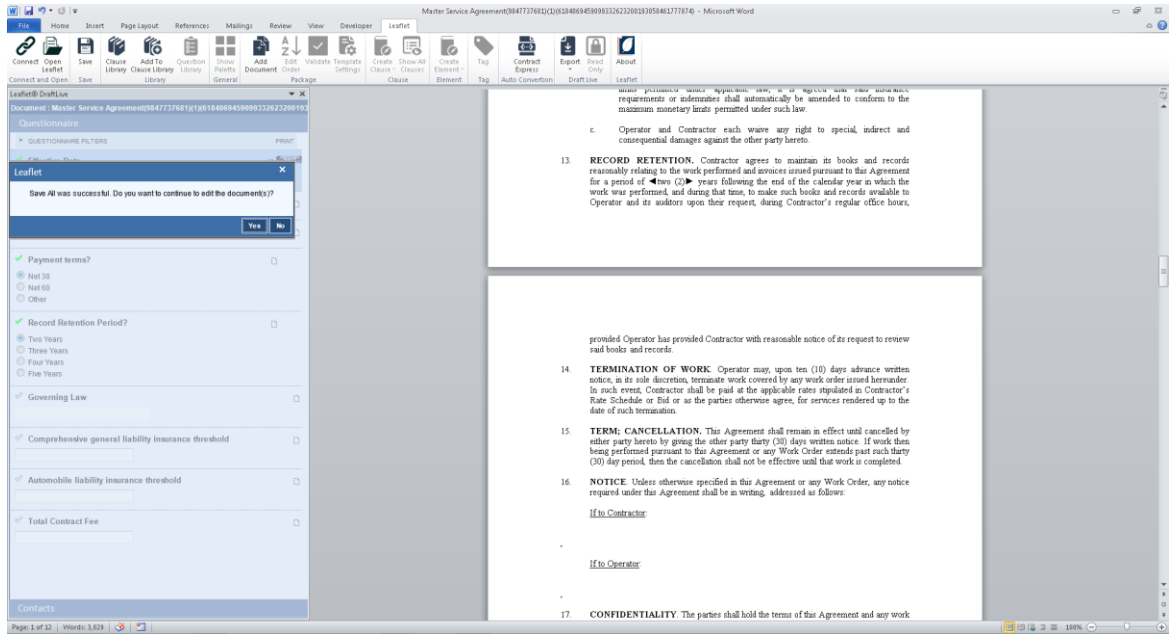
### 2.6.3 LEAFLET CUSTOMIZE FROM SHAREPOINT

1. Click on the context menu of your document. Select Leaflet Customize.



2. This document is opened in word format using Leaflet Customize. Make all the necessary changes required. And hit Save.

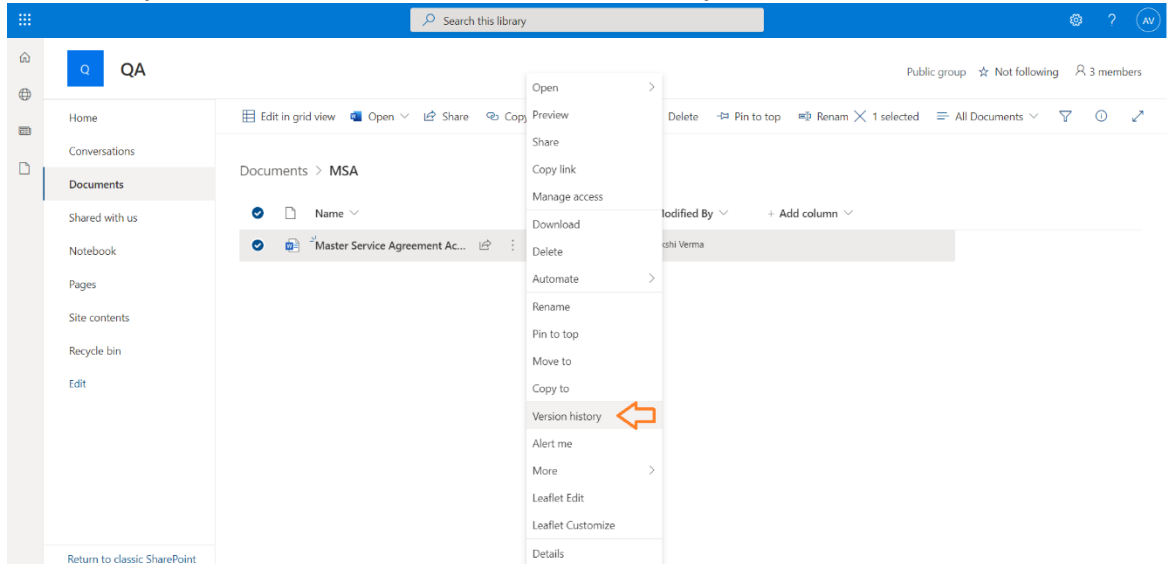




### 2.6.3.1 VERSION HISTORY

After saving the document in Leaflet Customize, as it is also edited version so now user can see previous and new versions both on SharePoint. (i.e. all the versions)

1. Open your folder on SharePoint. There from your context menu drop-down of your document, select Version history.



2. All the versions are available here. Previous version can be Restored by selecting Restore from version drop-down menu.



Search this library

QA

Public group ☆ Not following 3 members

Home Edit in grid view Open Share Copy link Download Delete Pin to top Rename 1 selected All Documents

### Version history

Delete All Versions

No.	Modified	Modified By	Size	Comments
3.0	6/12/2021 7:43 AM	<input type="checkbox"/> Akshi Verma	36.5 KB	
2.0	6/12/2021 7:00 AM	<input type="checkbox"/> Akshi Verma	32.3 KB	
1.0		<input type="checkbox"/> Akshi Verma	32.4 KB	

View  
Restore  
Delete

Return to classic SharePoint