leaflet Corporation
collaborative document automation

Leaflet® Platform™

TEAMS

SETUP & USER GUIDE

leaflet Corporation
collaborative document automation

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1 LEAFLET INTEGRATION WITH TEAMS

Leaflet 2.0 has integrated Microsoft Teams with its platform.

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.

2 WORKING THOUGH LEAFLET & TEAMS

Teams:

Teams are a collection of people, content, and tools surrounding different projects and outcomes within an organization.

- Teams can be created to be private to only invited users.
- Teams can also be created to be public and open and anyone within the organization can join (up to 10,000 members).

A team is designed to bring together a group of people who work closely to get things done. Teams can be dynamic for project-based work (for example, launching a product, creating a digital ship room), as well as ongoing, to reflect the internal structure of your organization (for example, departments and office locations). Conversations, files and notes across team channels are only visible to members of the team.

LEAFLET & TEAMS:

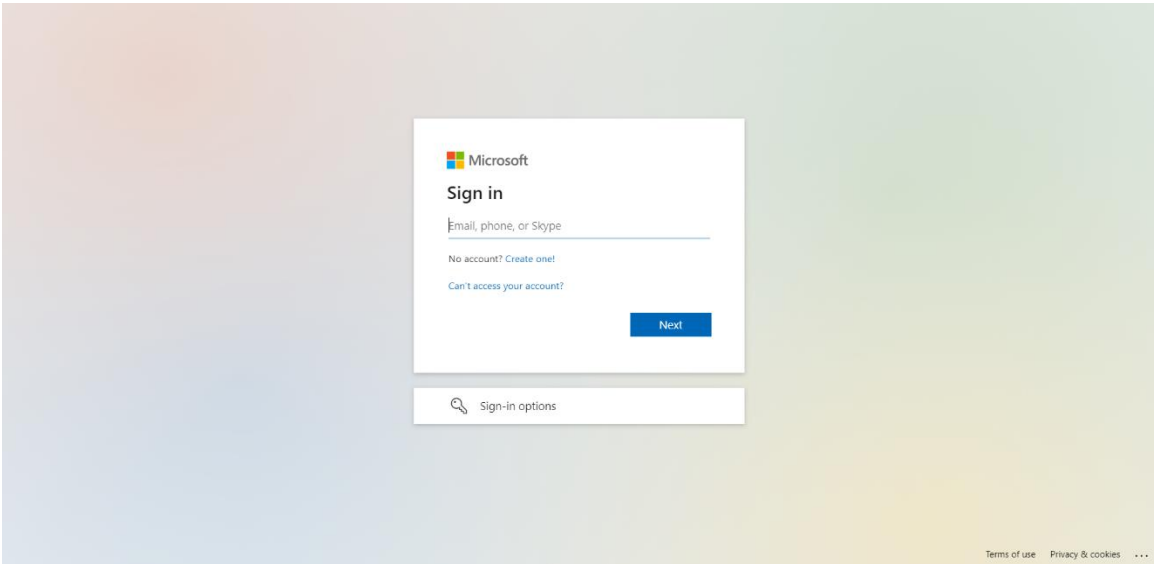
Documents can be moved from Leaflet platform to Microsoft Teams by working though different teams/channels. We will learn how to do so in the below sections.

2.1 TEAMS LOGIN

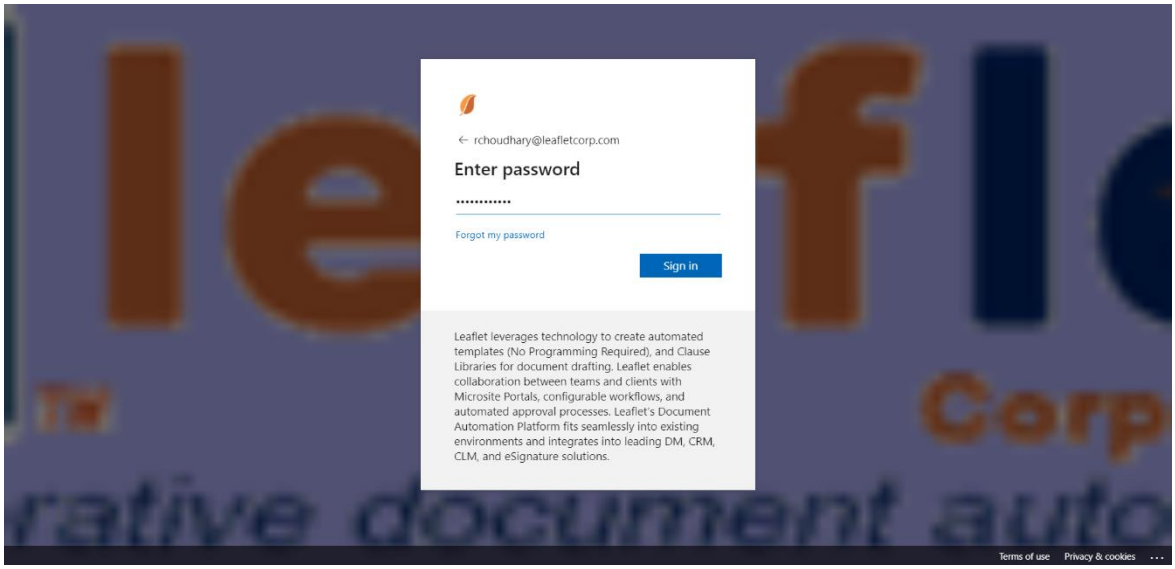
Log in Teams from:

https://teams.microsoft.com/

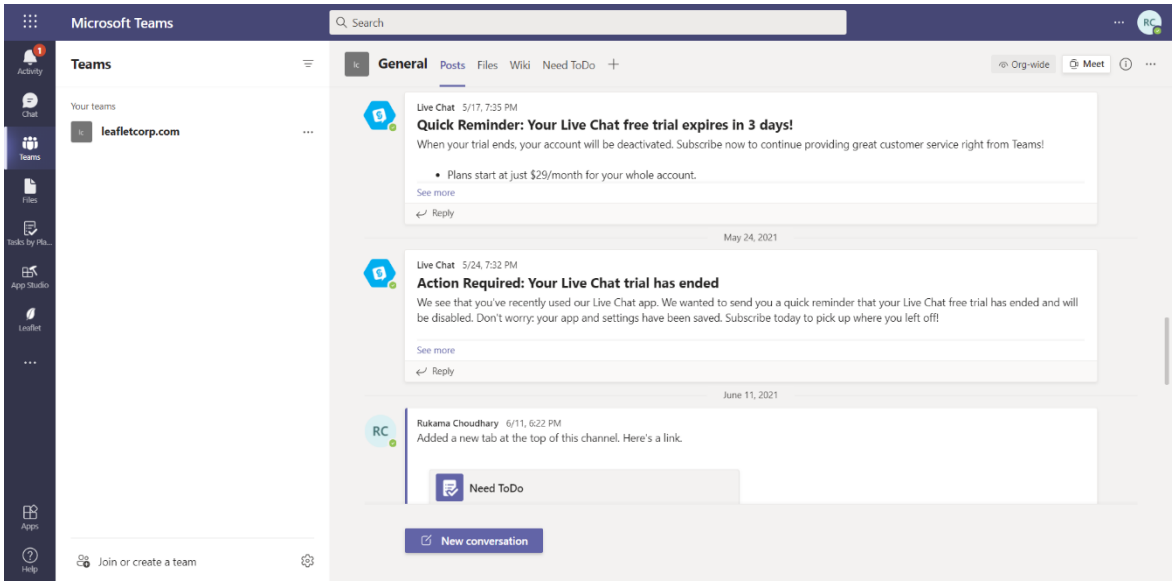
Provide Email Address and select Next.



Then enter Password and hit Sign in.



After logging in the screen appears like below:

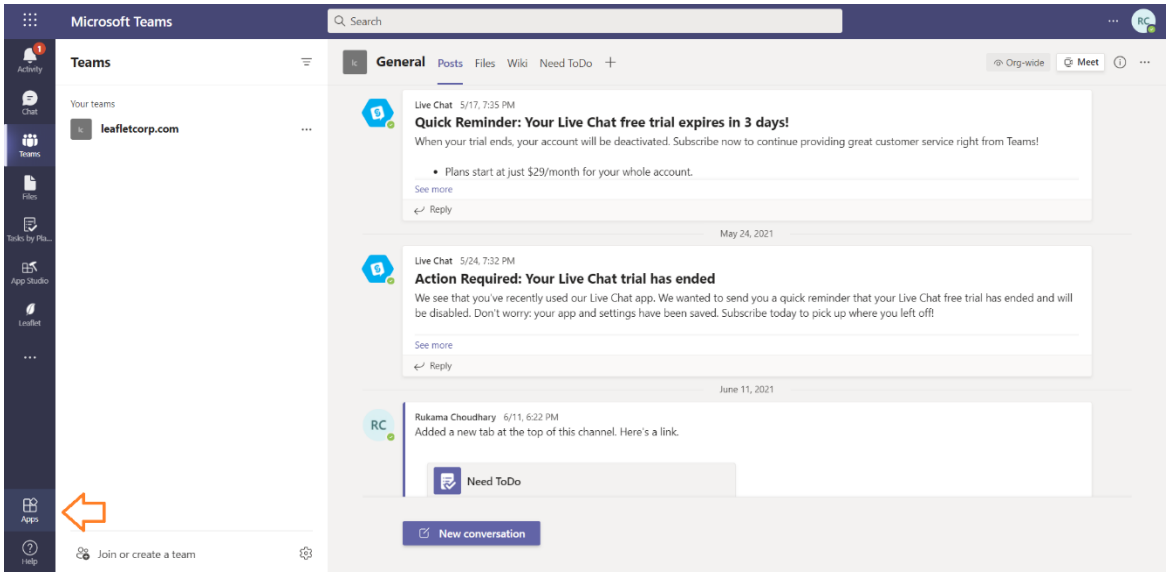


2.2 TEAMS SETUP

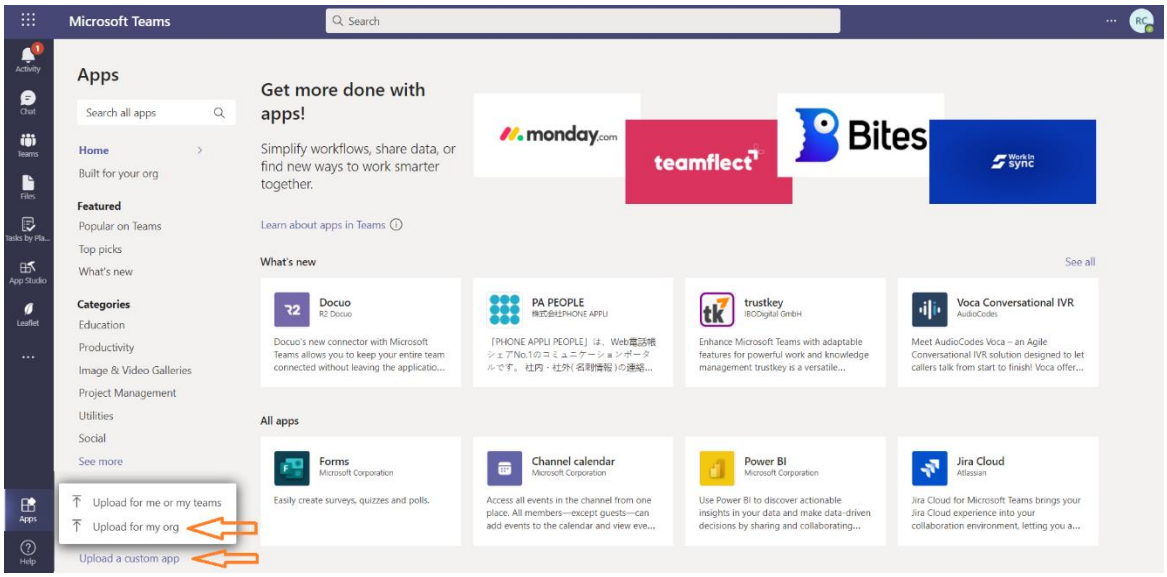
To integrate Leaflet and Teams, setup is required. This is a two step procedure. First uploading the custom app. Second submitting the app to the catalog.

2.2.1 UPLOADING THE CUSTOM APP

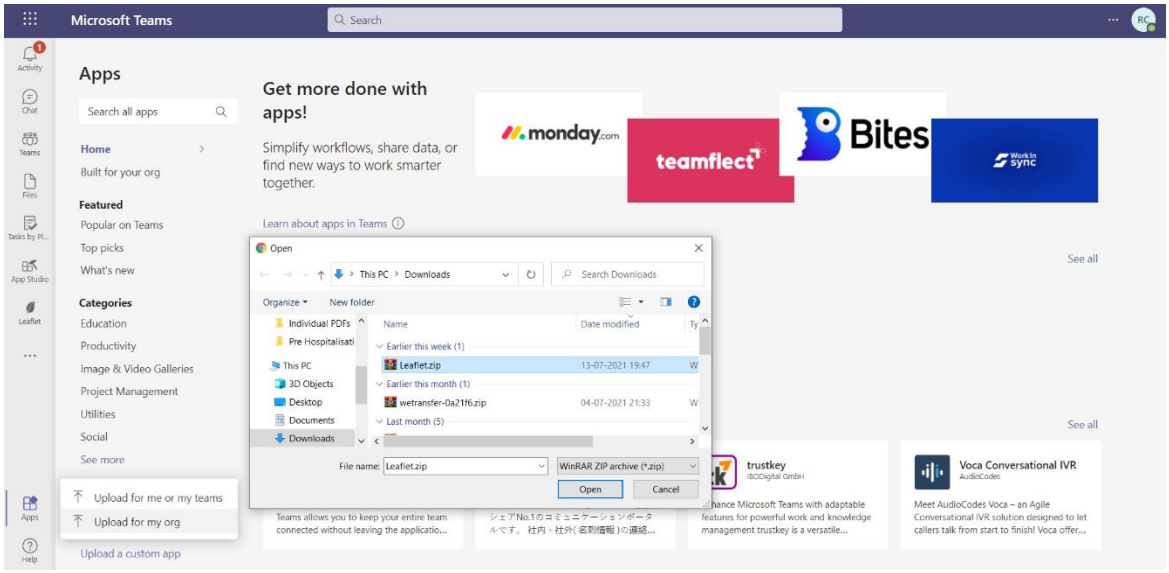
1. Open Apps from Teams.



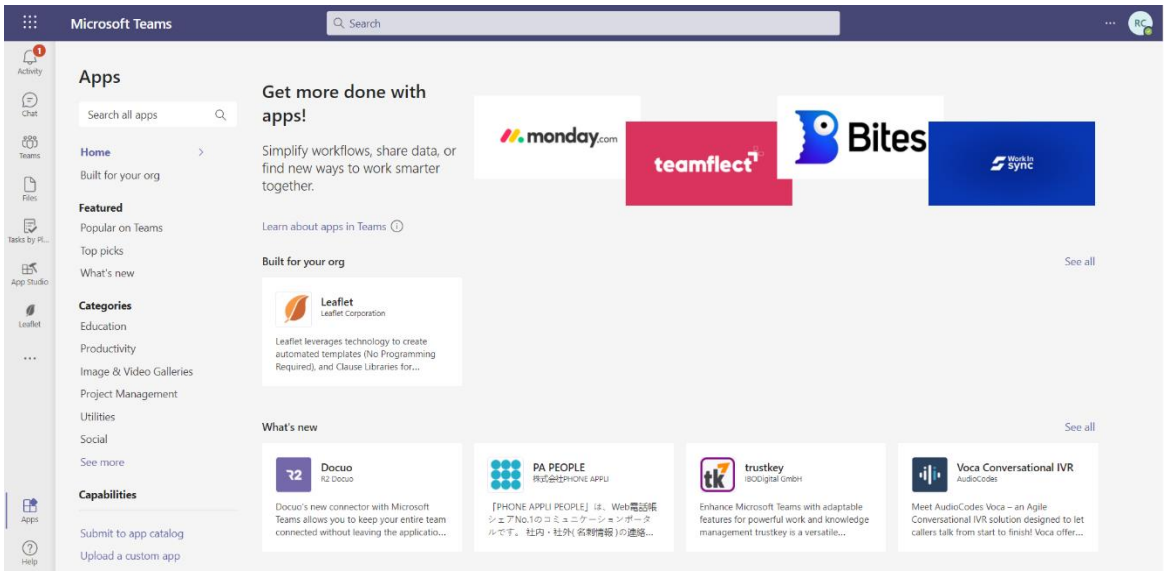
2. Select ‘Upload a custom app’. And from menu select ‘Upload for my org’.



3. From the pop-up select the Leaflet App package file. And click on Open. The selected App package will get uploaded.

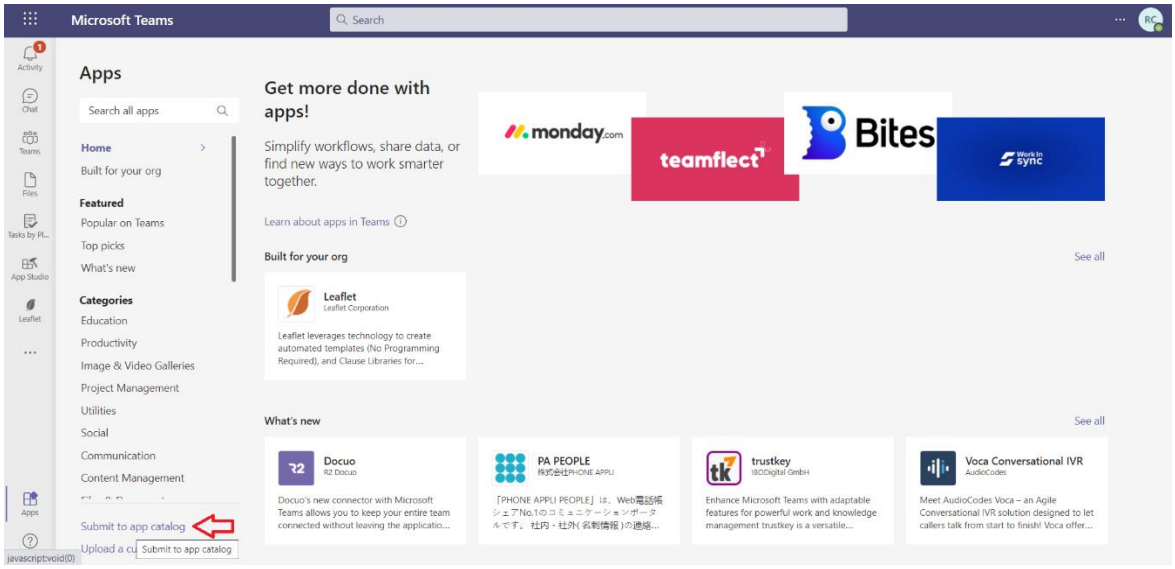


4. After App package is uploaded. It appears as below.

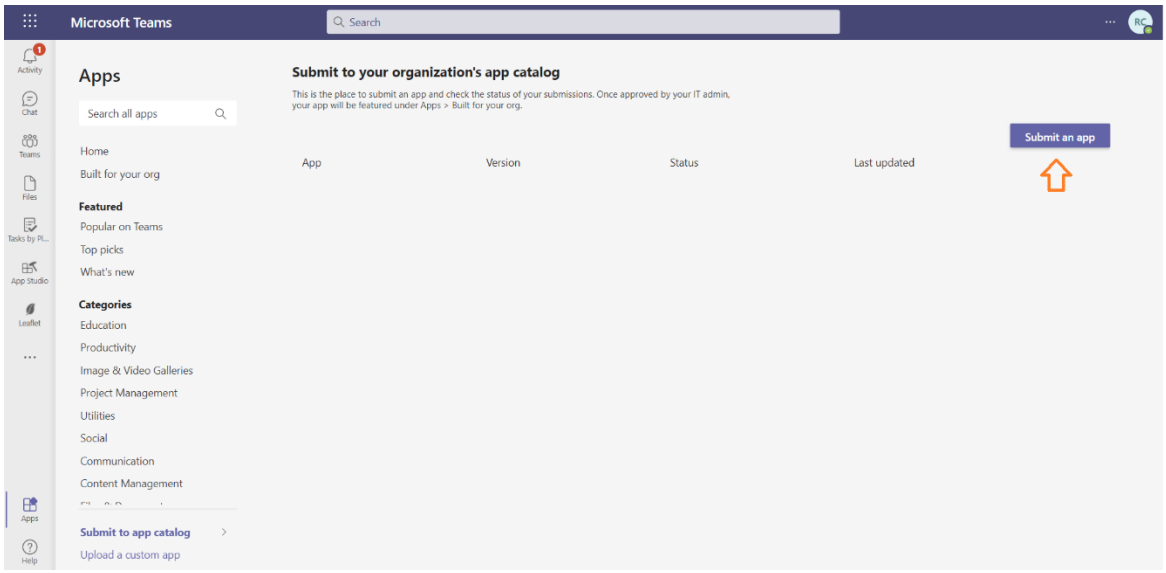


2.2.2 **SUBMIT TO APP CATALOG**

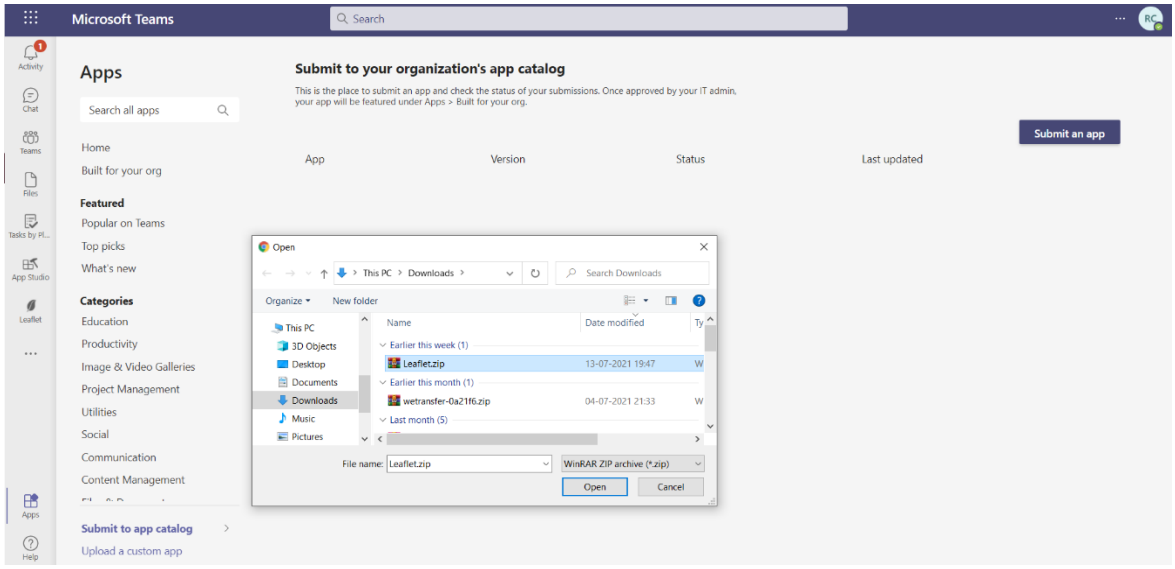
1. In Apps from left panel select ‘Submit to app catalog’.



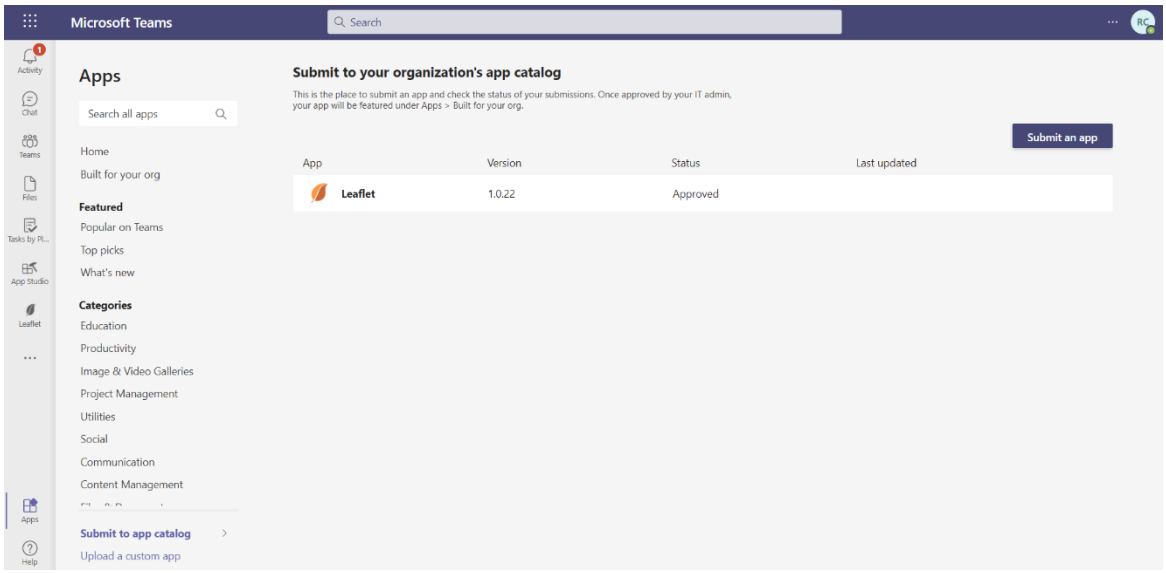
2. Select ‘Submit an app’.



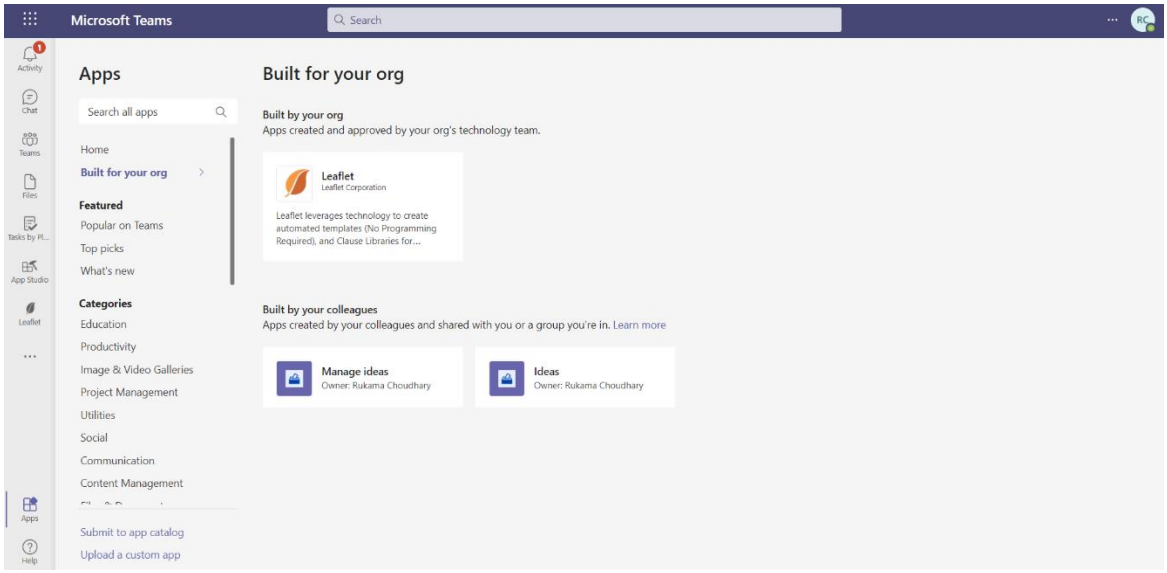
3. From the pop-up select your App. And click on Open.



4. Once submitted and approved it appears as below.



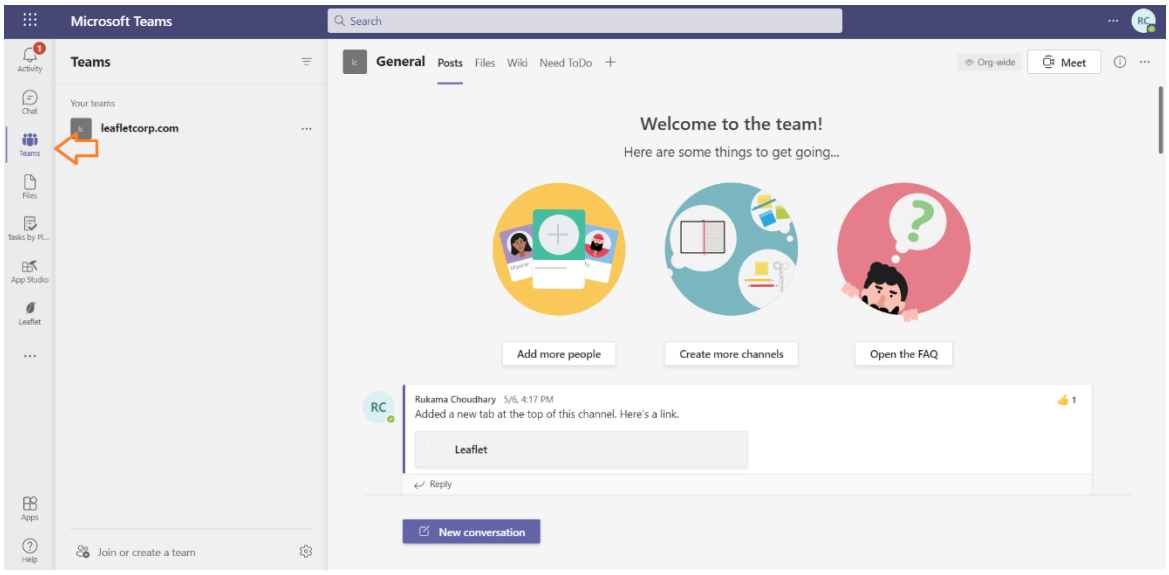
5. Once it is approved in above step then it also appears in ‘Apps > Built for your org’



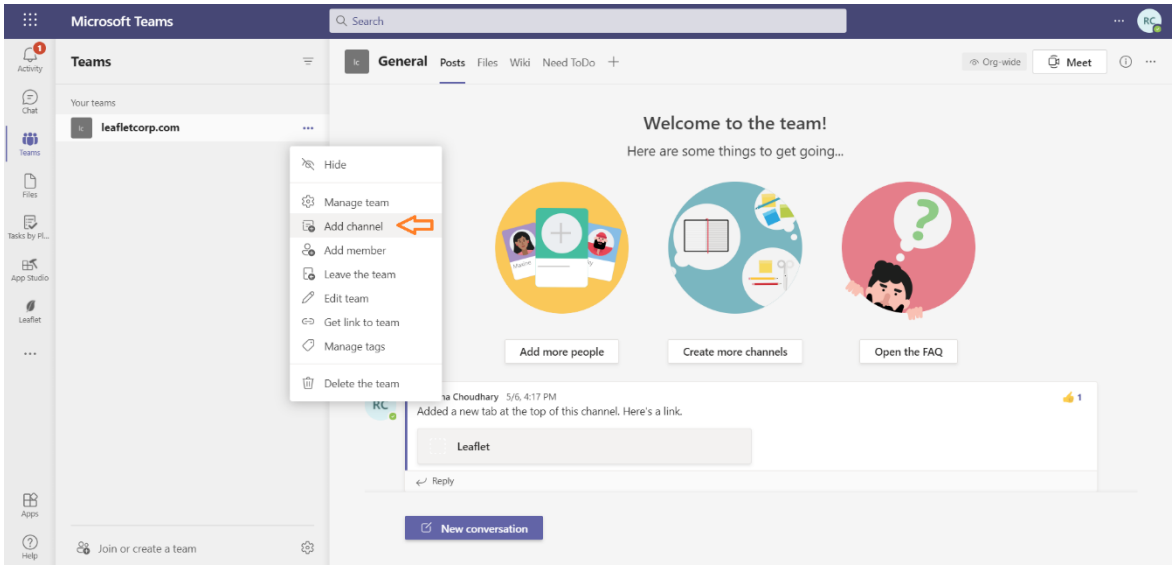
2.3 CHANNEL CREATION ON TEAMS

In a Team there can be multiple Channels. Channels are dedicated sections within a team to keep conversations organized by specific topics, projects, disciplines—-whatever works for your team! Files that you share in a channel (on the Files tab) are stored in SharePoint.

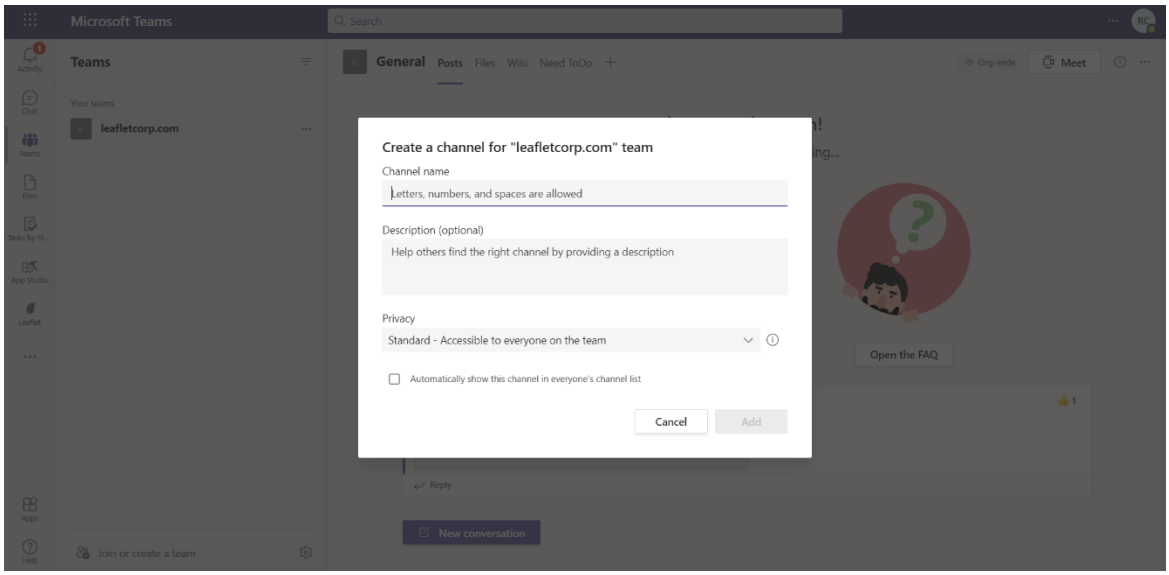
1. Go to Teams from left panel.



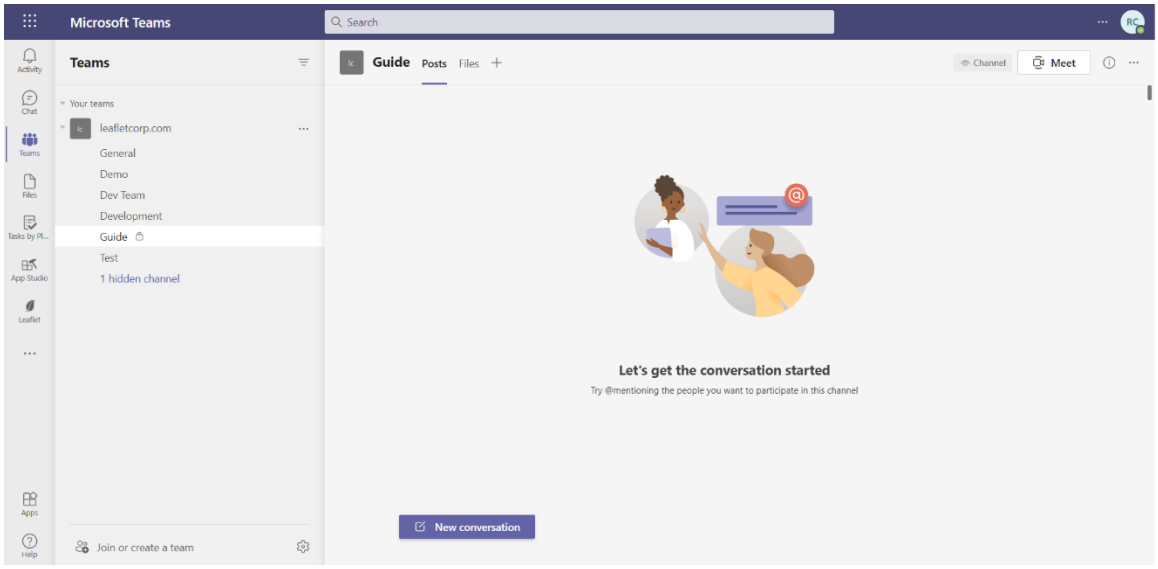
2. In your desired Team (if more than one), from context menu drop-down select ‘Add channel’.



3. In the pop up provide all the details of Channel. After providing details click on ‘Add’ button. Now your Channel is added to your Team.



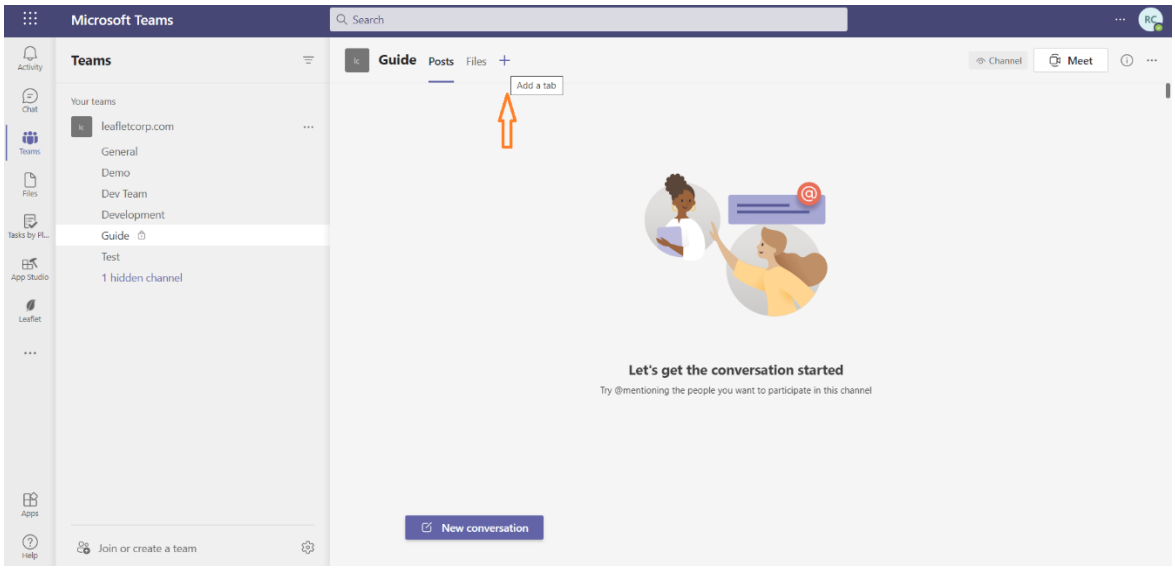
4. Once Channel is created it appears as below.



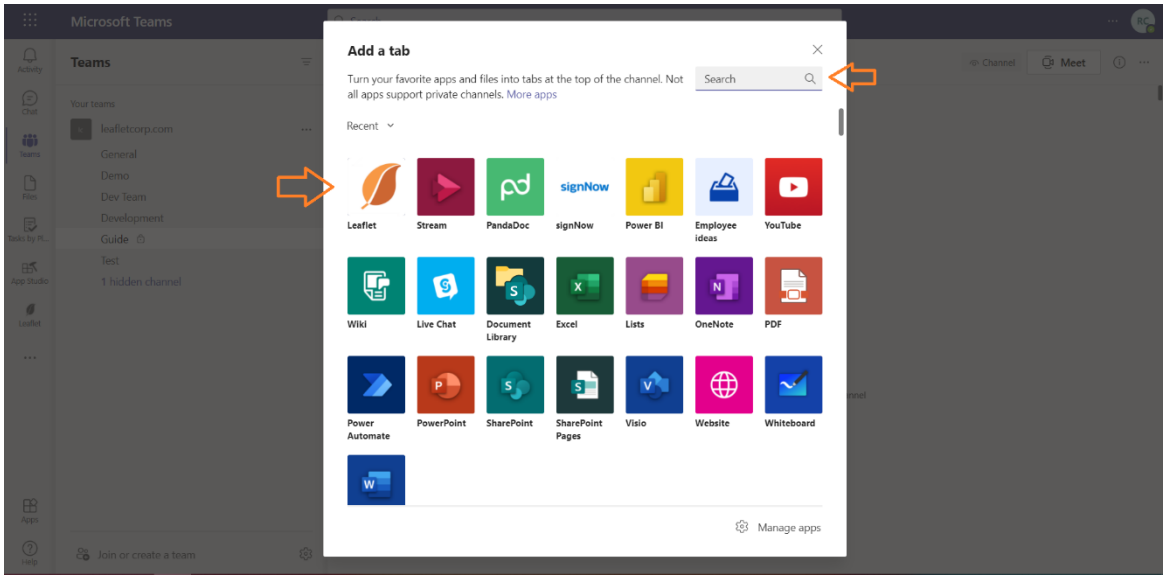
2.4 ADDING LEAFLET TO TEAMS IN CHANNEL

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

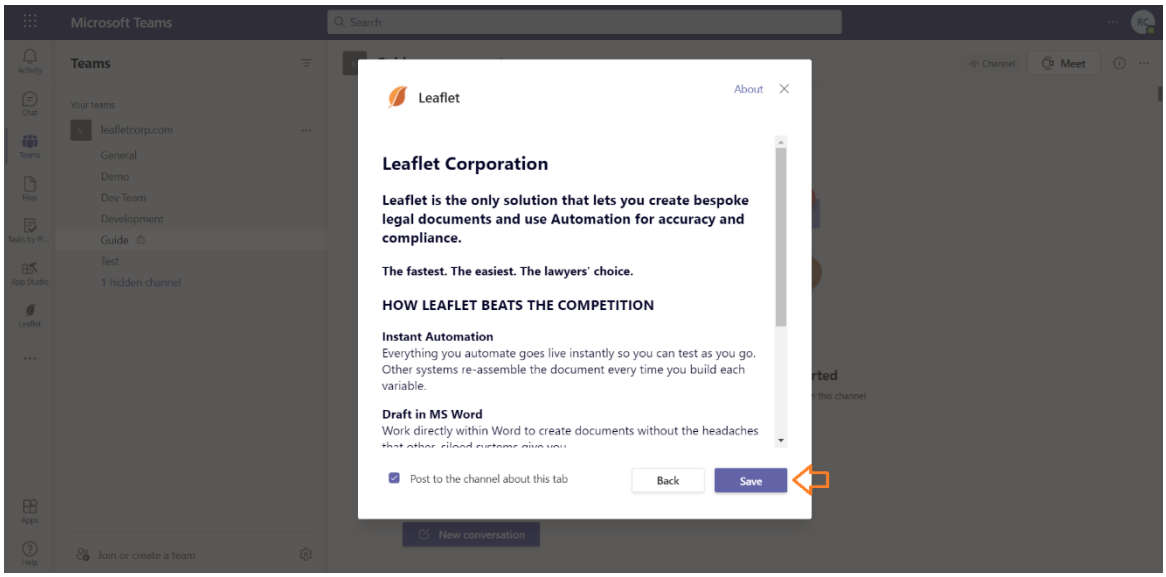
1. Click on '+' (Add a tab) button in your channel.



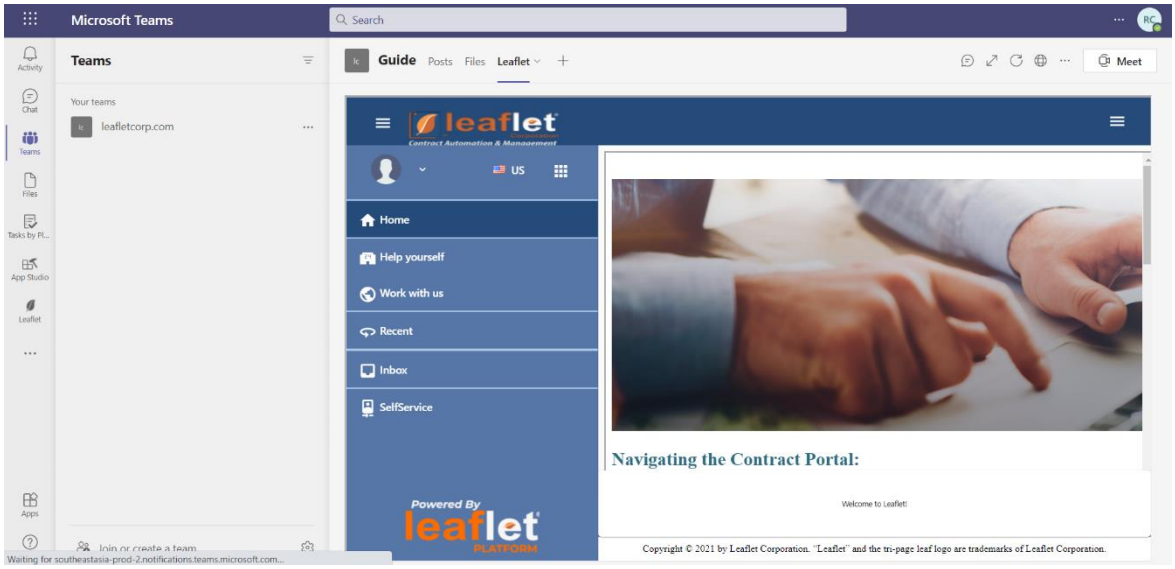
2. Either search 'Leaflet' in search bar or select directly by scrolling and finding Leaflet App.

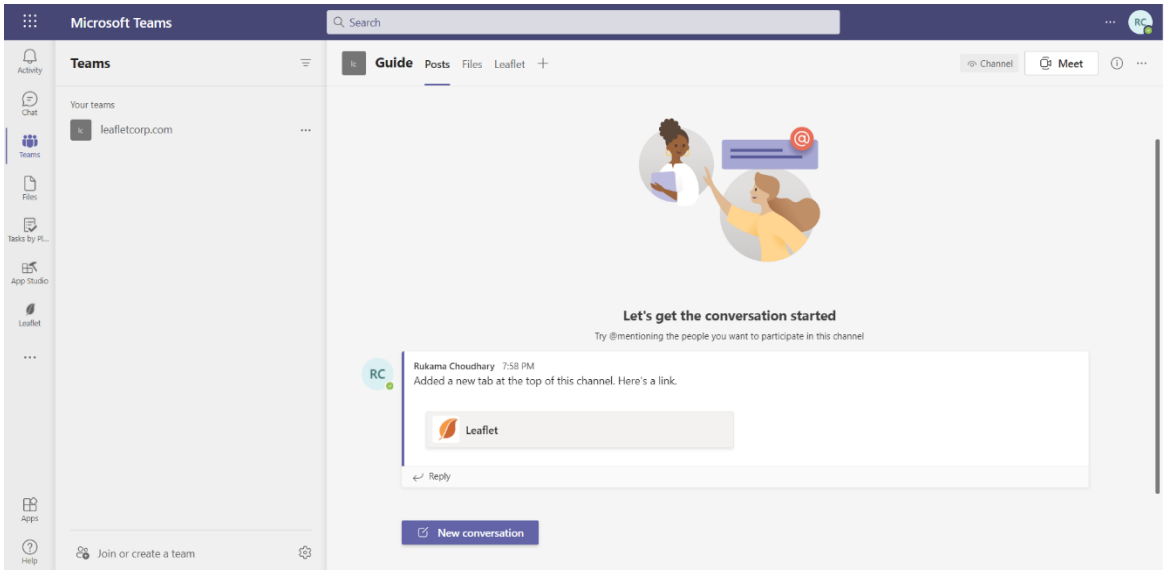


3. In the pop up it asks for the permission to get the App in your channel. Click on ‘Save’ button.



4. After adding Leaflet it appears as below



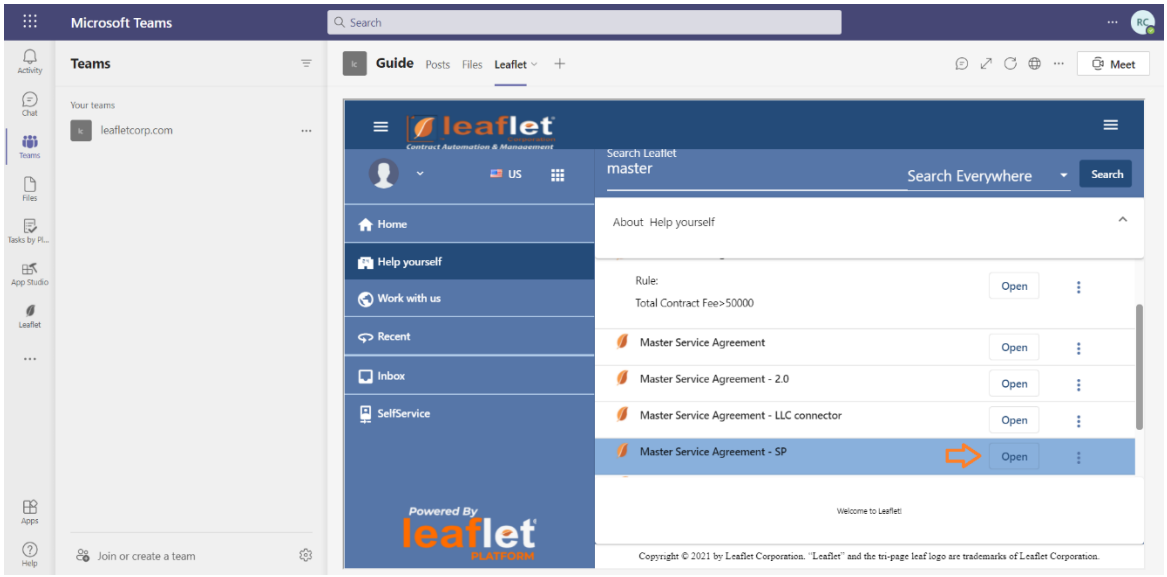


2.5 LEAFLET SUBMISSION

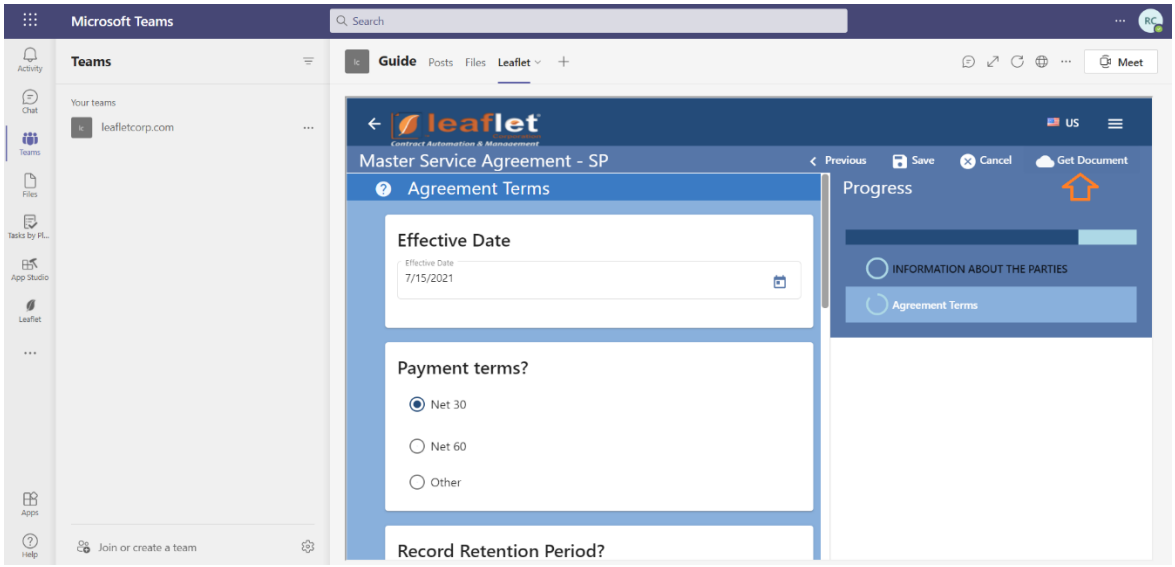
Various documents can be created under Leaflets. At one place all the Leaflets can be viewed. Basically we need to fill a questionnaire based on the document and such is then generated and a ready agreement is obtained and is available on Teams. Execution through this is easy, concise and time saving.

Once Leaflet is added to your Channel, any Leaflet can be used and submitted to Teams. Follow the below steps:

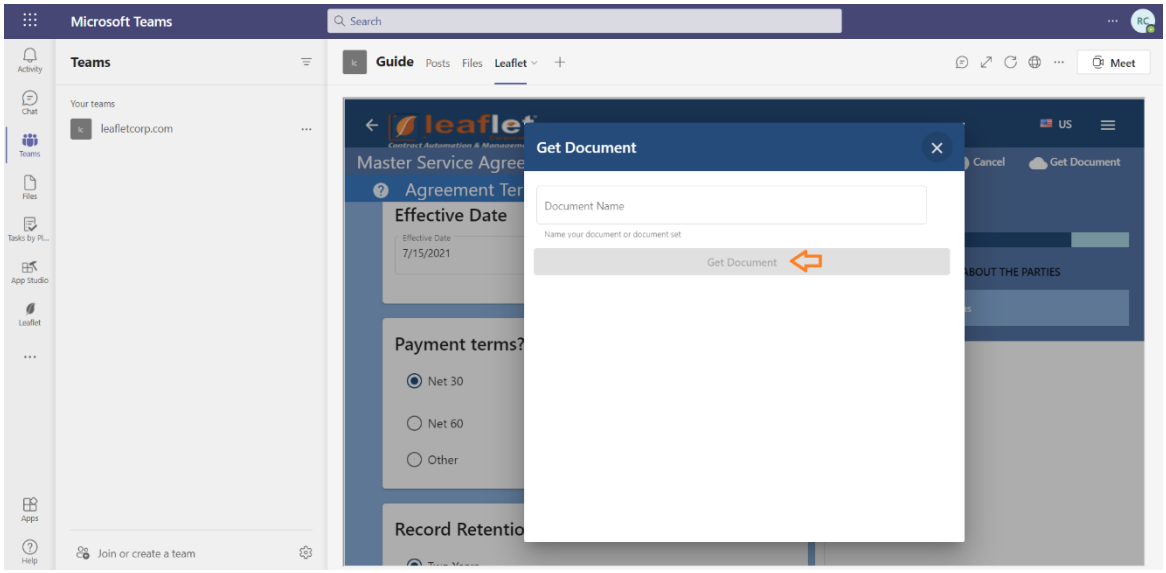
1. In the Leaflet tab on your Channel, open any desired Leaflet.



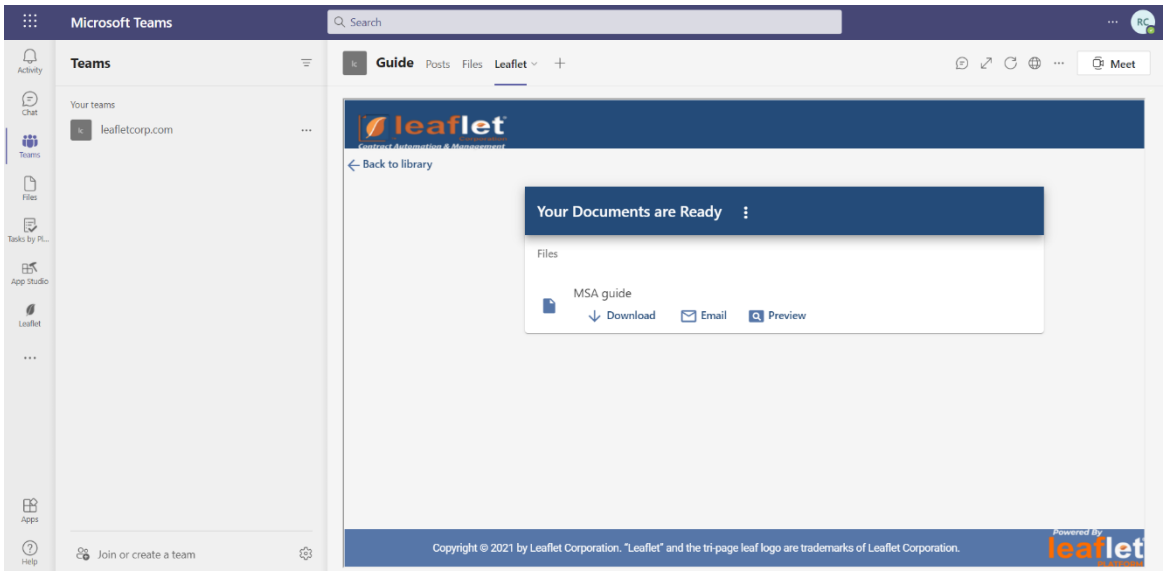
2. Fill in questionnaire and hit the Get Documents button.



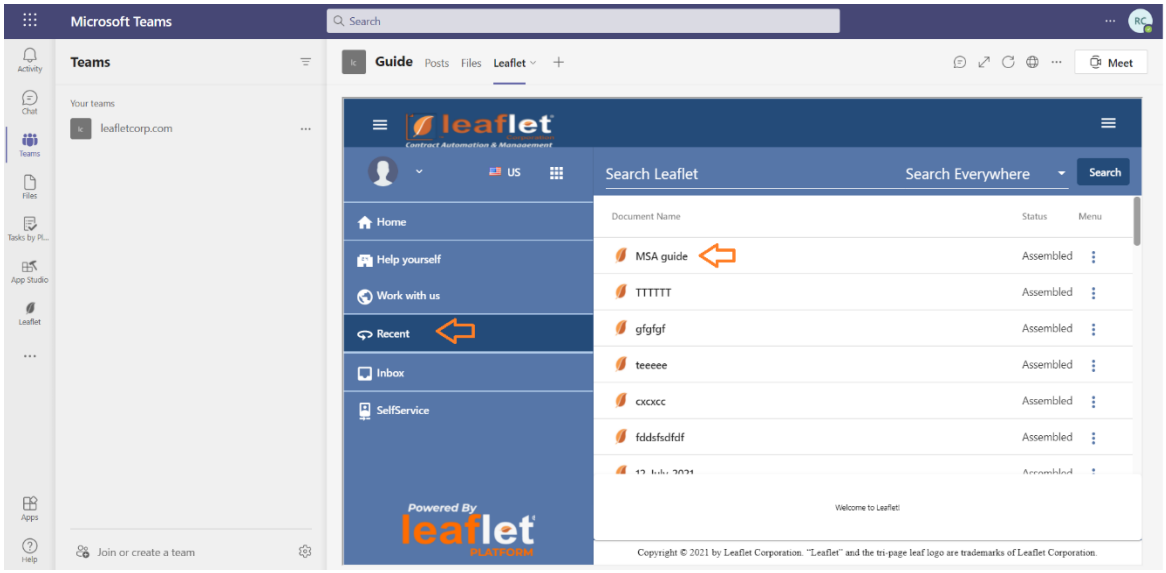
3. Provide the document name and click “Get Document”.



4. Once Leaflet is submitted it appears as below. Click on ‘Back to library’ on top left of Leaflet window.



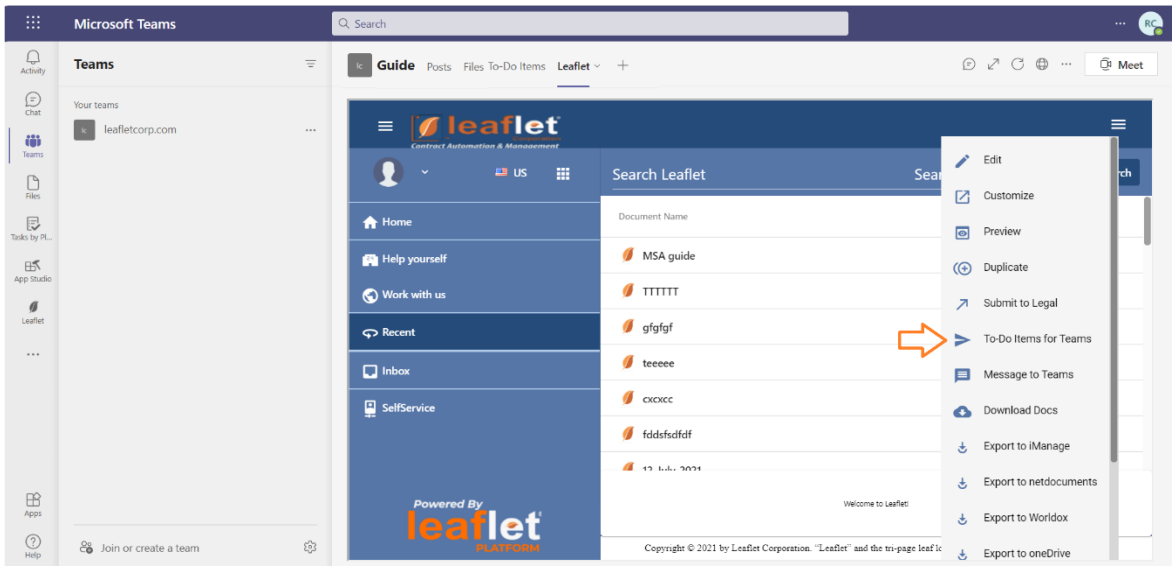
5. After the document is generated, you can access it from your Recent Queue.



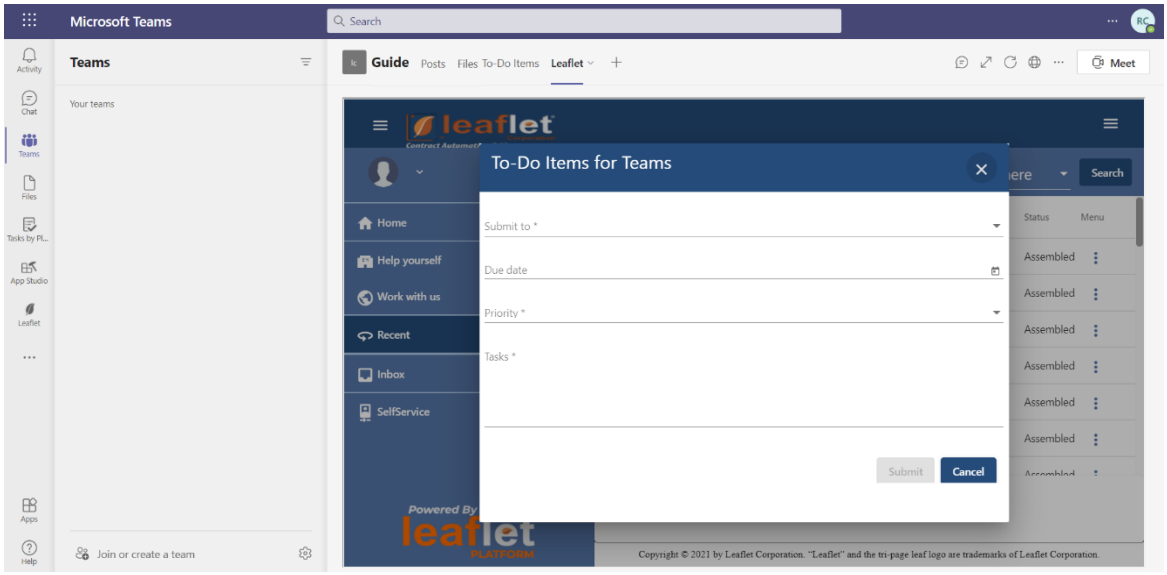
2.6 TO-DO ITEMS

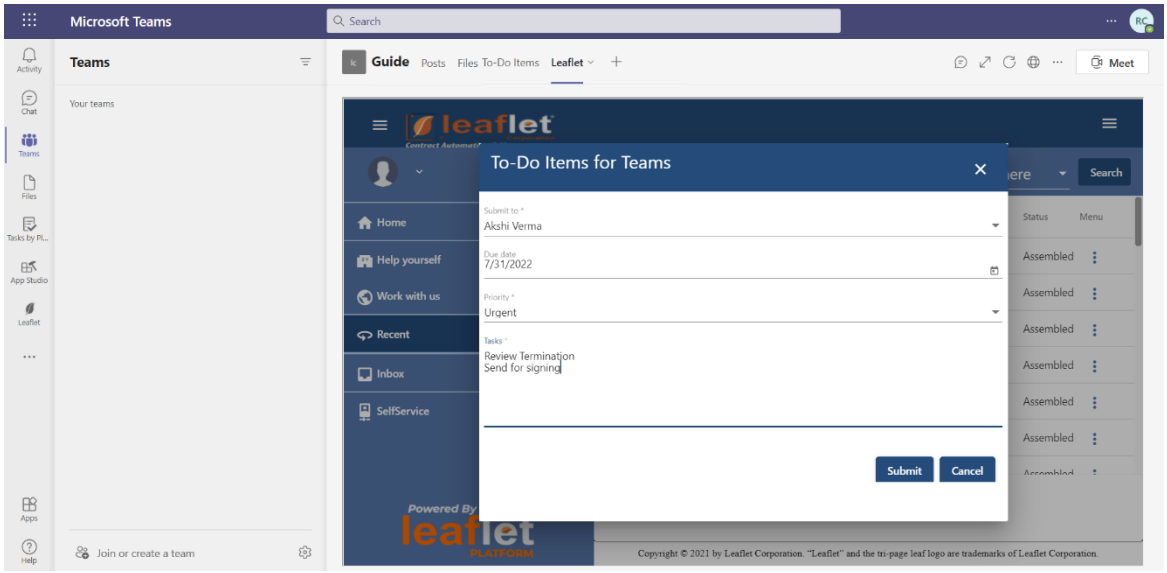
A list of To-do items can be created to keep track of all the to-do things/ tasks in your bucket list. You can track your progress, its priority, start date, due date, add any notes, create a checklist for it, add attachments, comments etc. Follow below steps to create your list:

1. Select context menu drop-down of your Leaflet from Recent Queue.

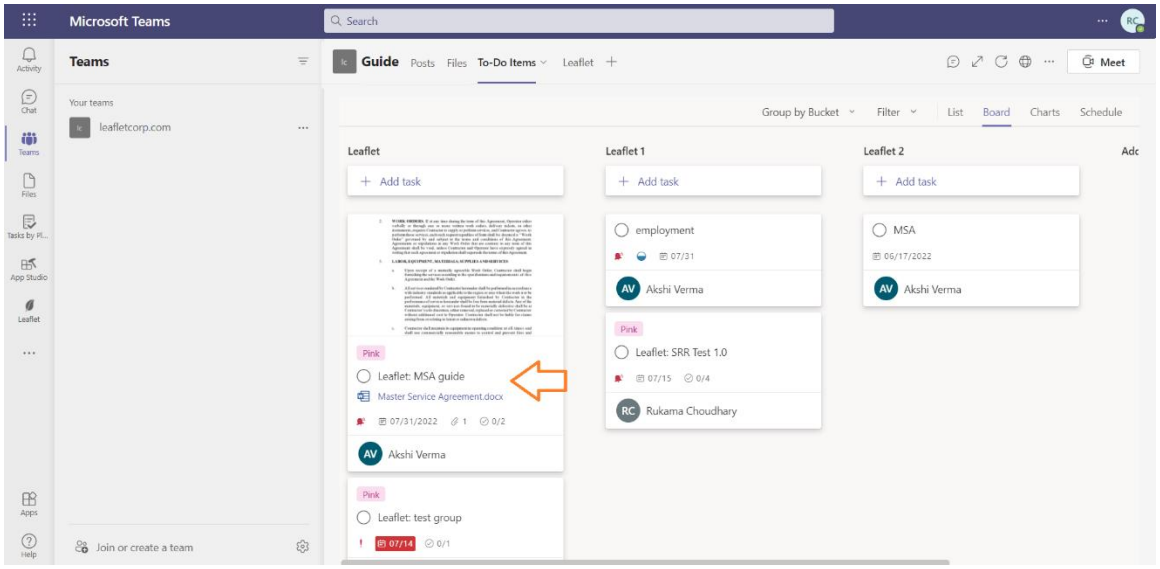


2. Select ‘To-Do Items for Teams’. Fill in all the details in the pop-up. And hit submit.





3. Go to 'To-do items', there this item is visibly added to the bucket.



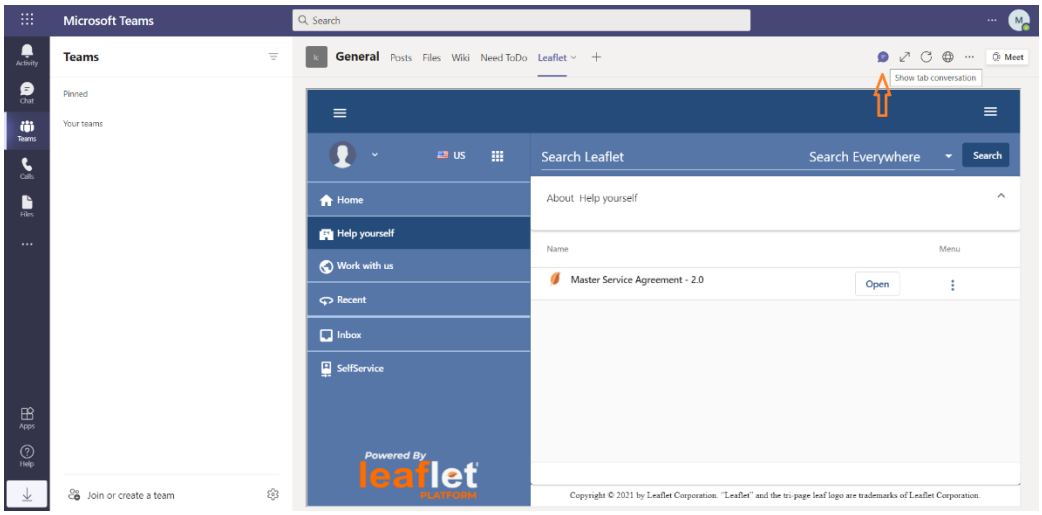
2.7 MESSAGE TO TEAMS

Messages can be sent to team by two ways: Messages icon in Leaflet tab (all messages here can be related to Leaflet) and other from Posts tab. Follow the below steps:

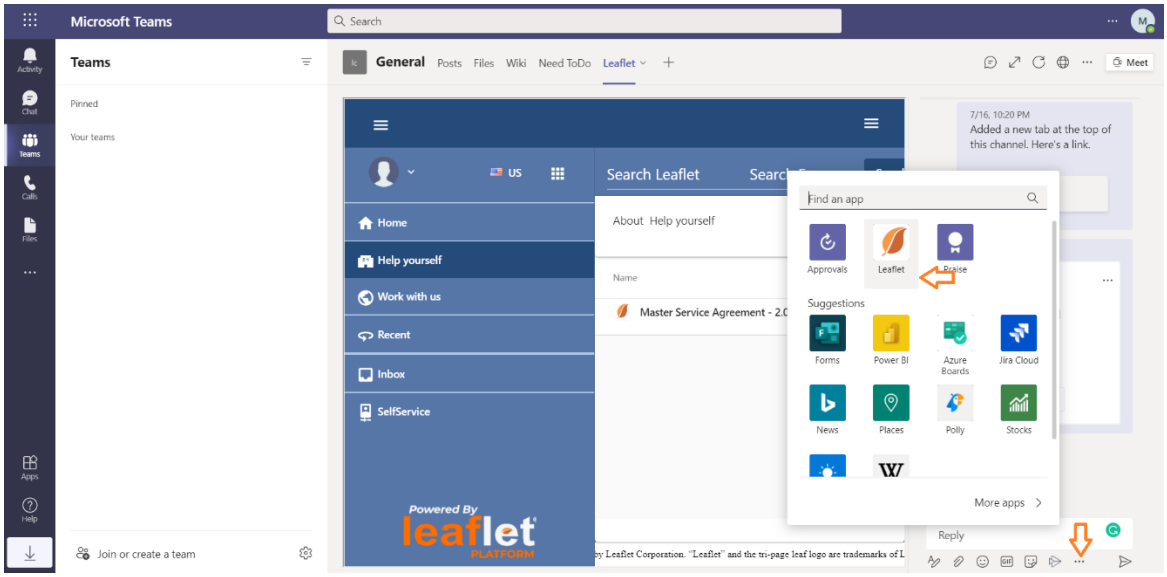
2.7.1 MESSAGES IN LEAFLET TAB

Conversation can take place easily while user is on Leaflet window. A leaflet can be send for review, edited, customized etc from here. Follow the below steps:

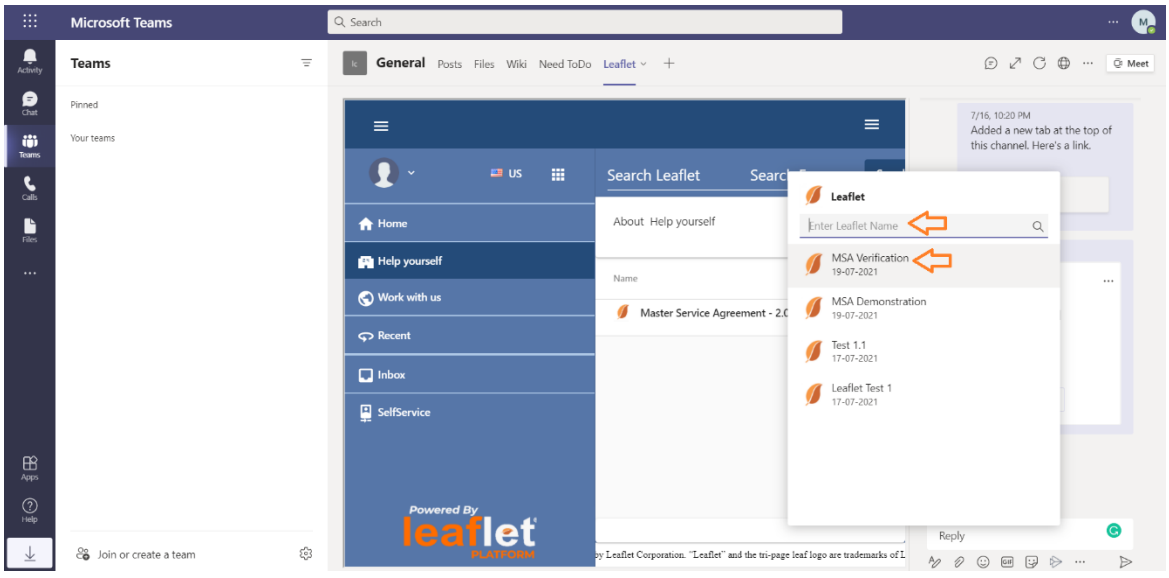
1. Click on the conversation icon on top right. (as indicated in below image)



2. Conversation panel opens up. Click on three dots at bottom and select Leaflet app icon.

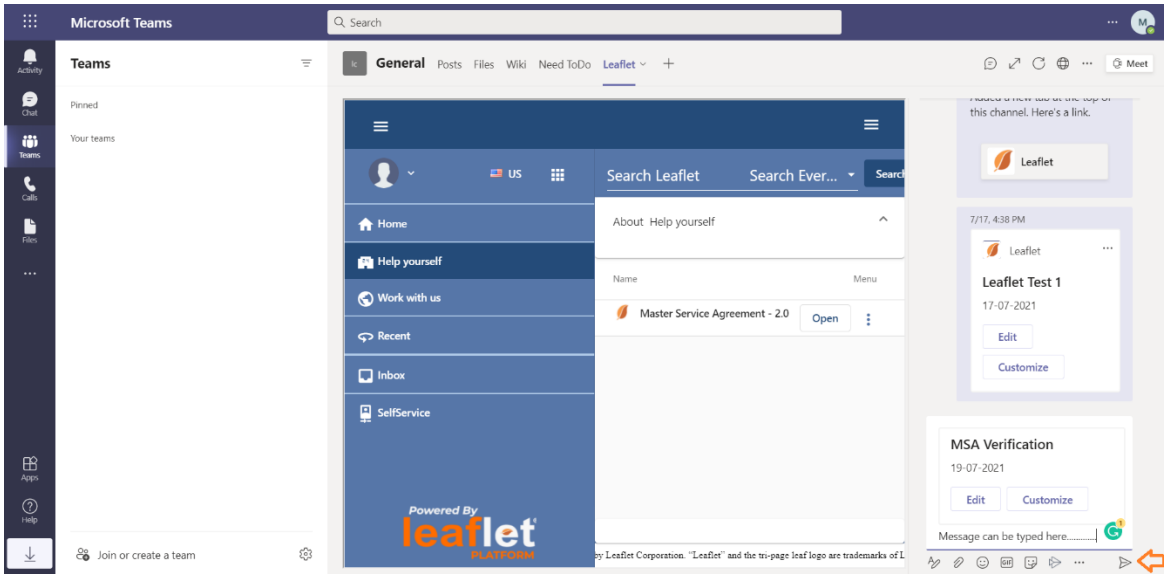


3. User can type in the Leaflet/Document name on top in this small pop-up window. Else can also scroll and select desired Leaflet/Document.

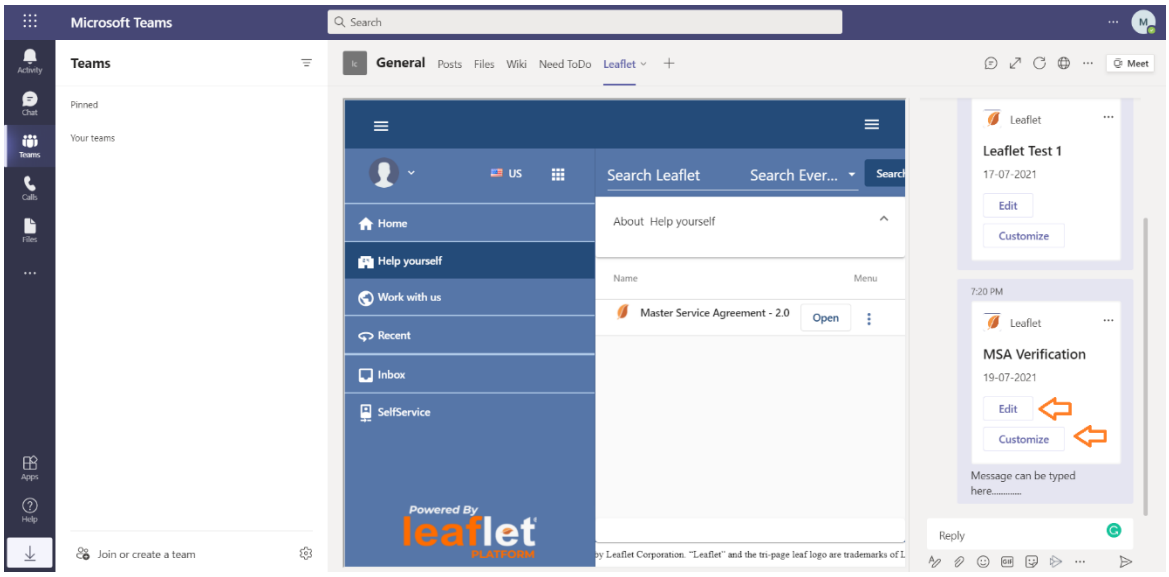


4. Once Leaflet/Document name is selected it appears to be sent. There along with it, user can type in the message as required. And then select the send icon.

button

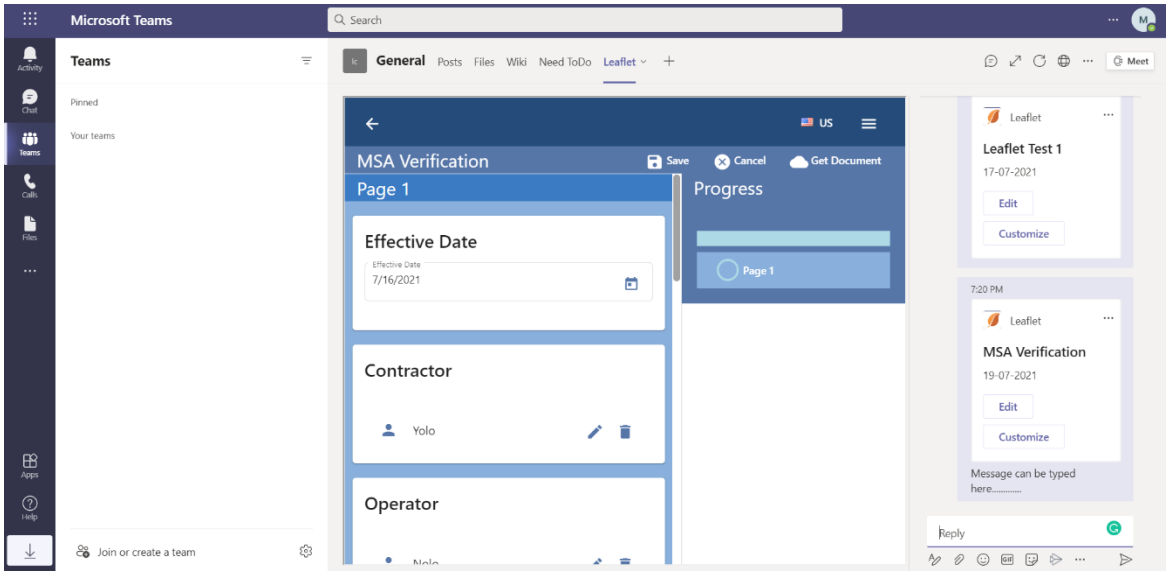


5. The sent Leaflet consists of three things mainly:
   Edit Button
   Customize button
   Message



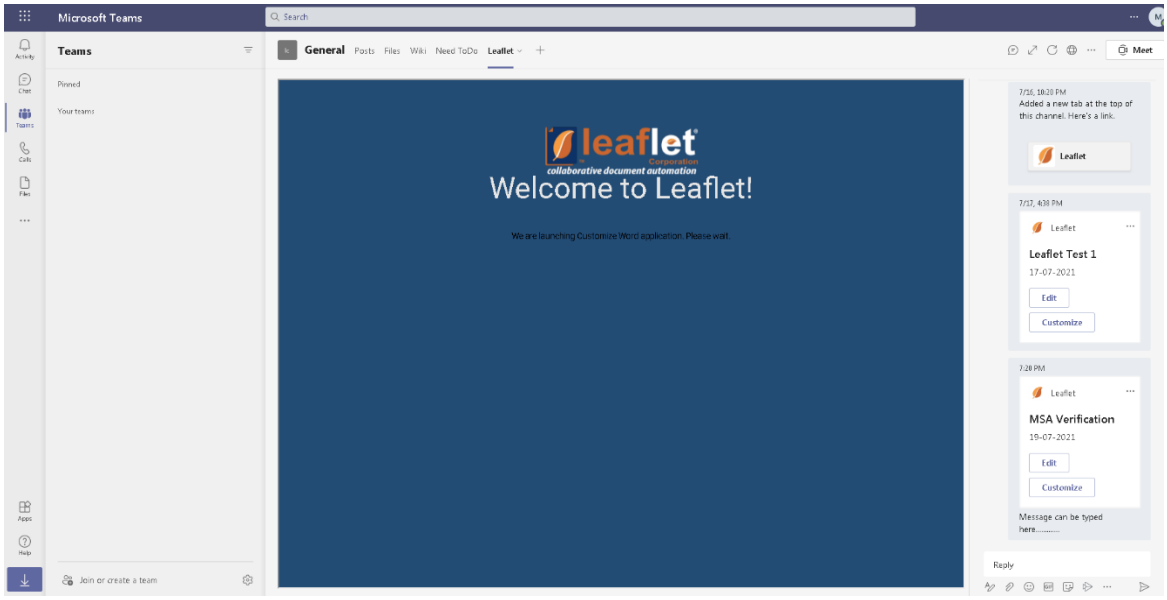
2.7.1.1 Editing the Leaflet

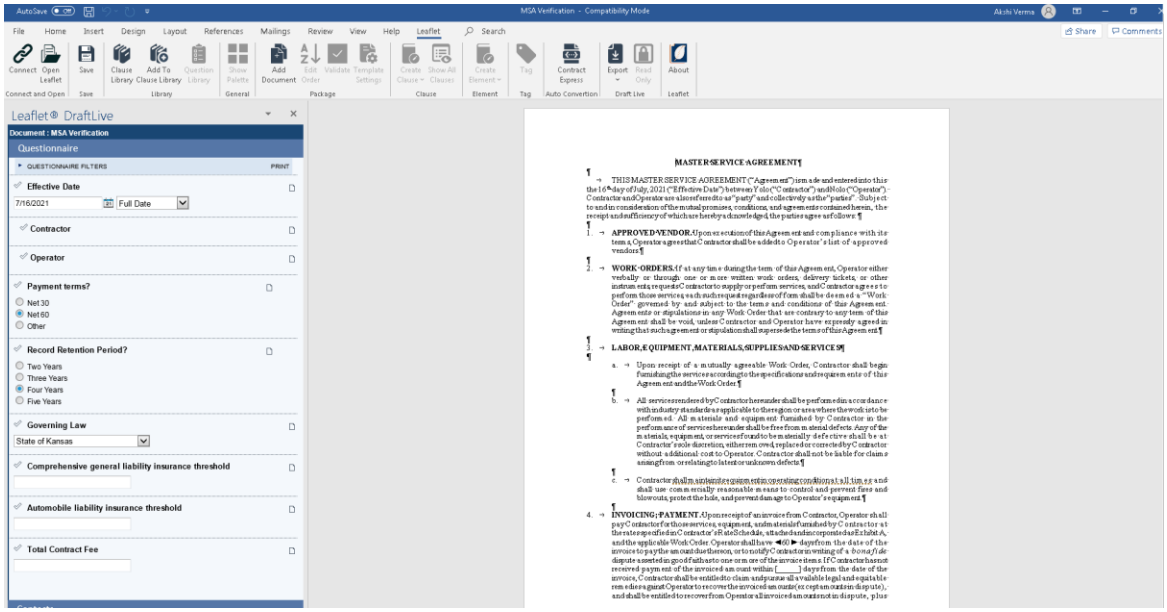
Edit button provides the user a very useful feature of editing the questionnaire and make all the necessary changes as required. Once user clicks on Edit button, the Leaflets questionnaire opens up (as shown below). Once user is done click on Get Document. And now a edited version of document is ready.



2.7.1.2 Customize the Leaflet

Customize button provides the user a very useful feature of editing the document live. User can make all the necessary changes which can be seen reflecting on document. Once the user clicks on Customize button below screen appears. And after that document opens as word file having the questionnaire on left panel. Make all the changes to questions as required. Save the document. Once done it can be exported at same time by using Export button on Leaflet ribbon in word file. (refer the second image below)

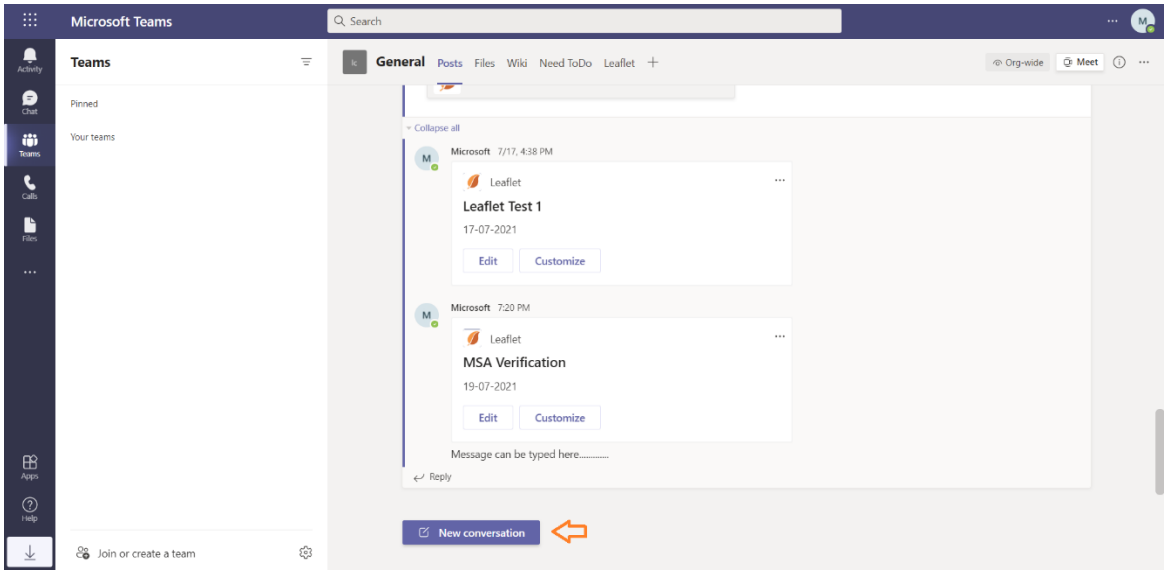




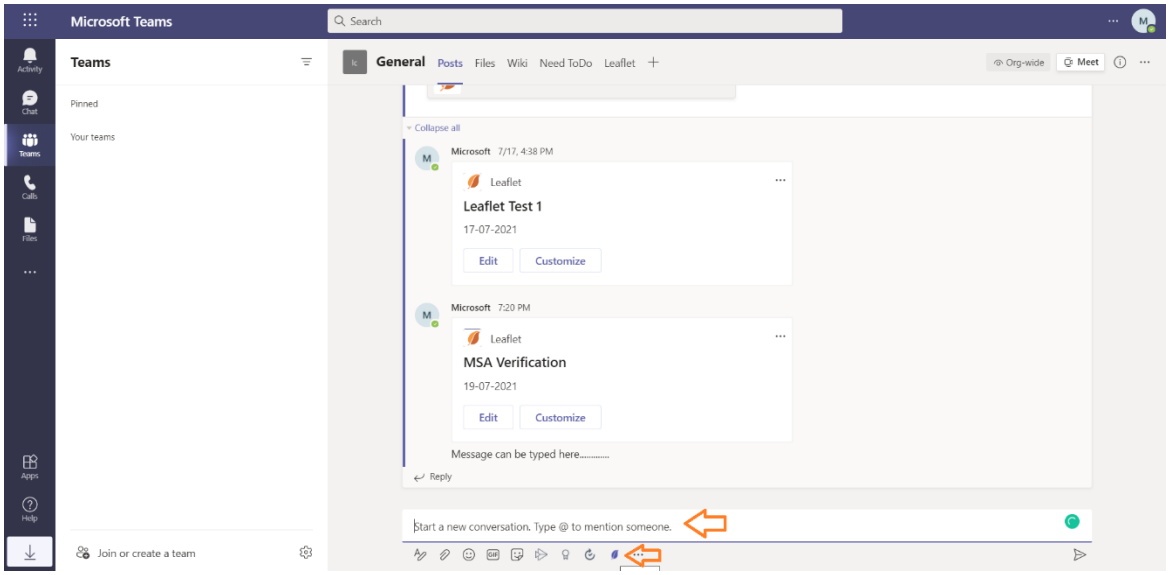
2.7.2 **MESSAGE TO TEAMS**

Messages can be sent through Posts tab. Here all the conversation can take place other than on Leaflet as well. A new conversation each time can also be initiated by clicking on “New Conversation” button. Follow the below steps:

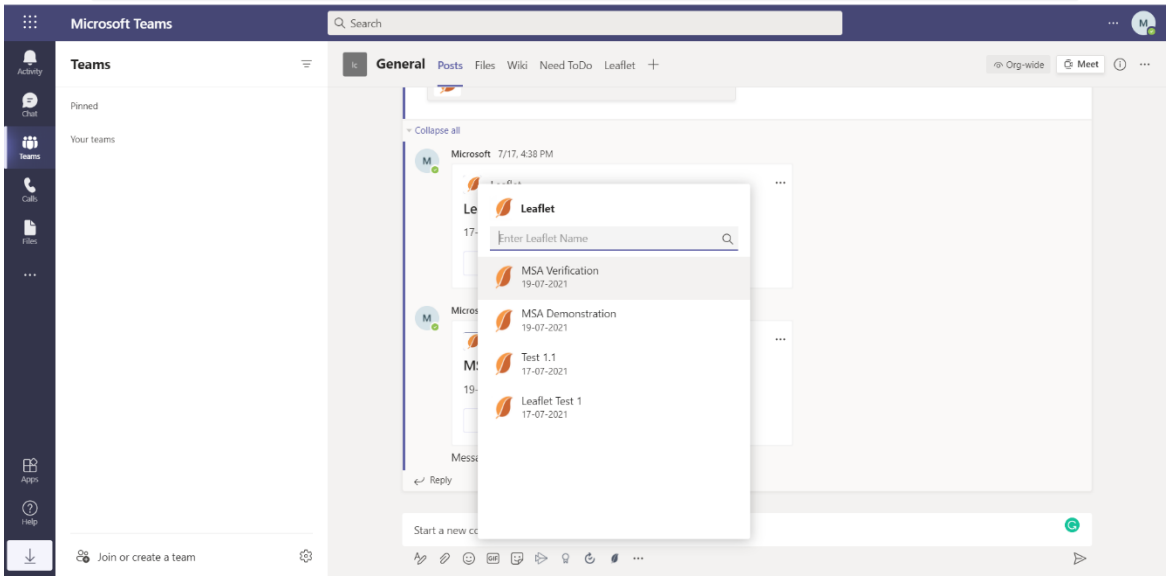
1. Click on “New Conversation” button to initiate a new conversation.



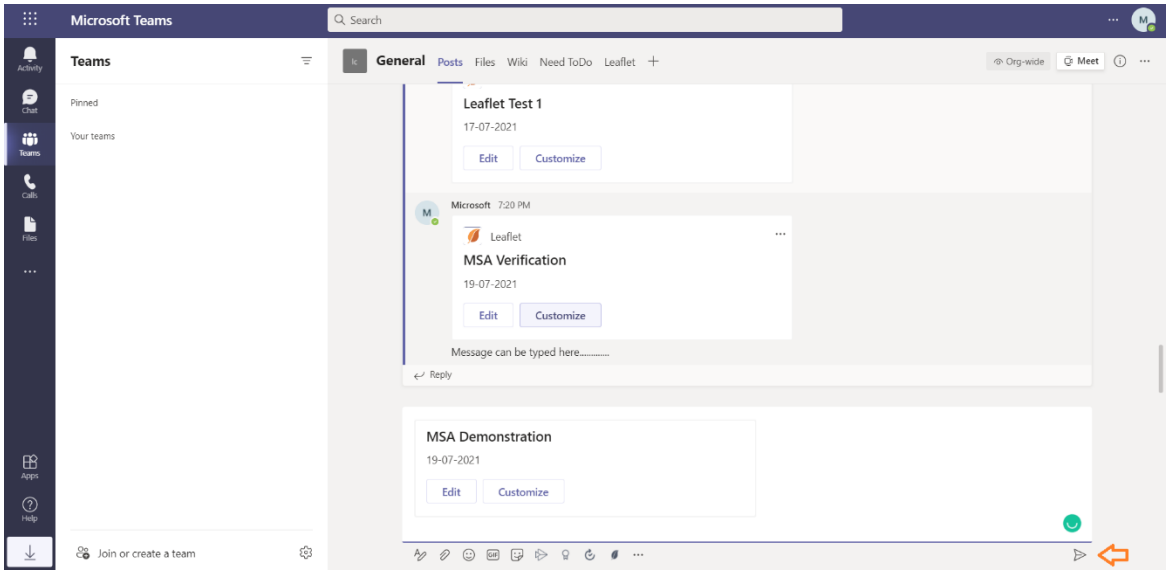
2. Type in the message and send. Or type in message and click on Leaflet icon to attach the Leaflet as desired.



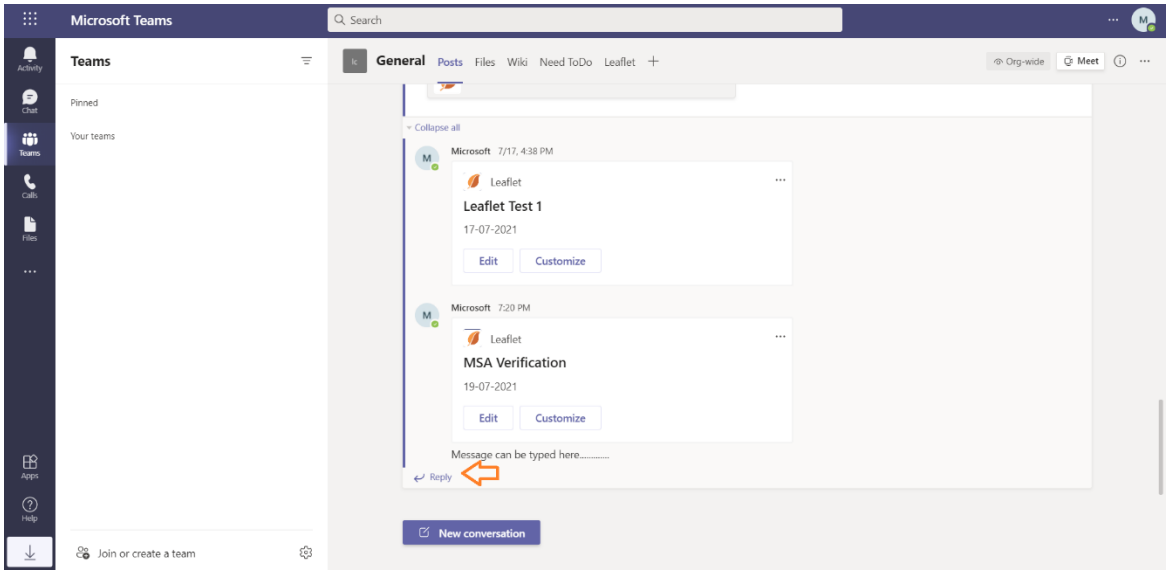
3. Leaflet pop-up window appears. User can type in the Leaflet/Document name on top in this small pop-up window. Else can also scroll and select desired Leaflet/Document.



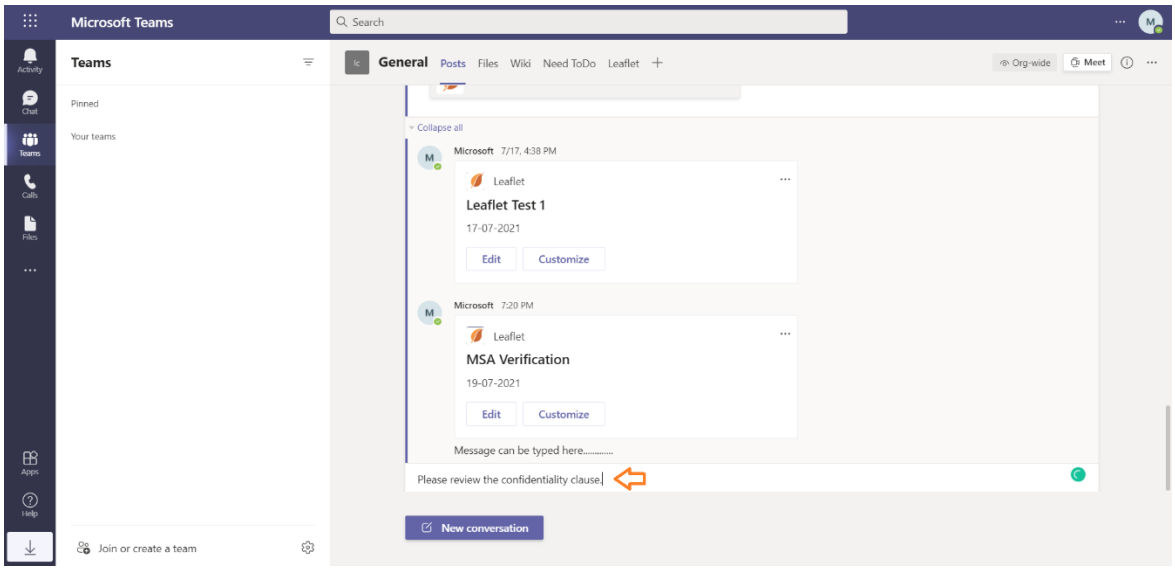
4. Once done click on Send button.



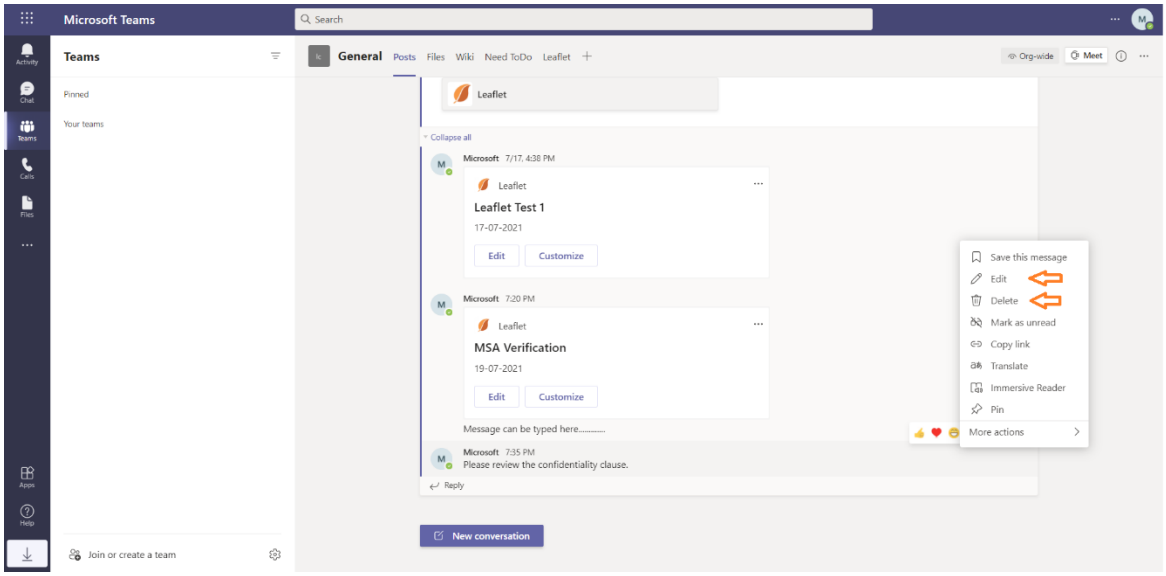
5. User can continue on same conversation by clicking on ‘Reply’ (as indicated below).



6. Type in the message and send.



7. Reply sent can be edited/ deleted etc by using the context menu of each reply sent.


Microsoft Teams
Search
Teams
Pinned
Your teams
Join or create a team
General
Posts
Files
Wiki
Need ToDo
Leaflet
Org-wide
Meet
Leaflet
Collapse all
Microsoft 7/17, 4:38 PM
Leaflet
Leaflet Test 1
17-07-2021
Edit
Customize
Microsoft 7:20 PM
Leaflet
MSA Verification
19-07-2021
Edit
Customize
Message can be typed here.....
Microsoft 7:35 PM
Please review the confidentiality clause.
Reply
New conversation
Save this message
Edit
Delete
Mark as unread
Copy link
Translate
Immersive Reader
Pin
More actions