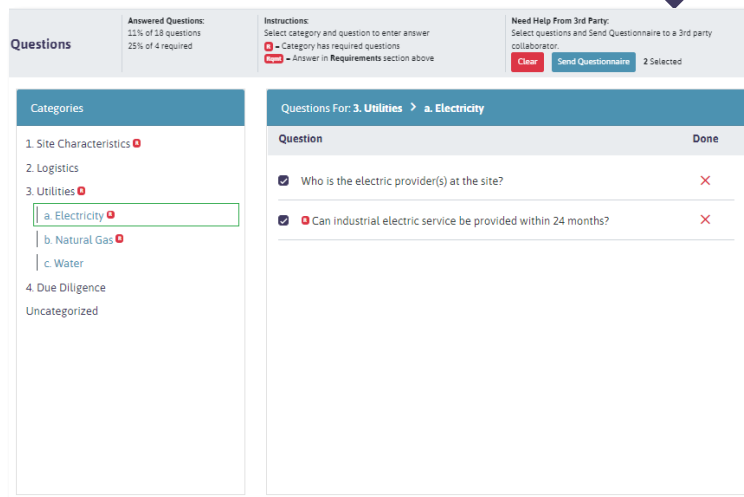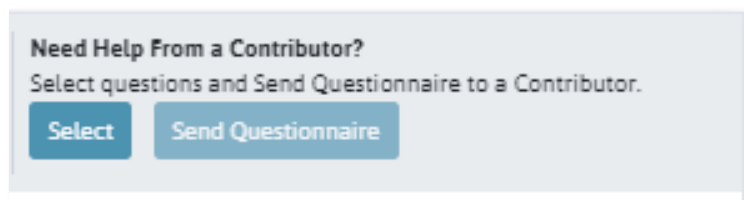# How to Invite Contributors to Assist with Property Responses

A Step-by-Step Guide

Selecting Questions and Inviting Contributors

1. Need Help from 3rd Party– If you are working on a property and need help with responses to certain questions, this tool allows Participants to select questions to send to a 3rd party recipient (Contributor) for collaboration.

2. To Select Individual Questions:

a. Questions – Click "Select" in the Need Help From a 3rd Party tool found in the top-right corner of the Questions section of the property record. Checkboxes will then be displayed for selection.

b. Selections - Click the checkbox next to the question(s) you require assistance with from the Contributor, then click "Send Questionnaire."

3. To Select All Questions:

a. **Questions –** Click "Select" in the Need Help From a 3rd Party tool found in the top-right corner of the Questions section of the property record, then click "Select All." Lasso will automatically select all questions in the project. Once ready, click "Send Questionnaire."

4. To Select Categories:

a. **Questions –** Click "Select" in the Need Help From a 3rd Party tool found in the top-right corner of the Questions section of the property record.

b. **Selections –** Click a primary category then a secondary category to display the questions assigned to the secondary category. Click "Select Category" found in the Questions header above. Lasso will automatically select all questions assigned to the secondary category. Once ready, click "Send Questionnaire."

Note: Once you've selected a secondary category, you can continue to select additional secondary categories to send to the Contributor in the same Questionnaire.

Questionnaire Wizard

1. Name – Enter a name for your Questionnaire, then click on the "2" at the top of the popup to proceed to the next step. Clicking on the numbers at the top of the popup allows you to navigate the Questionnaire Wizard.

2. Questions – Confirm the list of questions includes all the questions you would like the Contributor to provide responses to.

a. To Remove Questions - Click on the X next to questions you wish to remove.

Note: If you need to add more questions, click "Cancel" at the bottom of the popup and create a new Questionnaire.

3. Recipient – Select the recipient you wish to send the Questionnaire to by either selecting an existing Participant or Contributor, or by creating a new Contributor.

a. To Add an Existing Contributor or Participant – Enter data into the provided fields, click "Search," then click "Add" to add the recipient.

b. To Add a New Contributor – Complete the required the fields, then click "Add New User" to add the recipient.

4. Options – Options provides a draft of the email notification the Contributor will receive when invited to complete a Questionnaire.

Note: The Subject and Message Body fields include default entries but can be edited by the user. Click on the checkboxes next to "Share the project description with the recipient?" and "Select project attachments to share with the recipient" if you wish for the Contributor to view these details about the project.

5. Review – Review the details of your questionnaire.

a. Save For Later - Allows you to save a draft of your Questionnaire to be completed at a later time.

b. Send Questionnaire - Send the Questionnaire to the Contributor. An email will be sent with a link to complete the Questionnaire.

Note: At any time, you can click the numbers above to return and update information in any section of the Questionnaire prior to sending.

Contributors: Accepting Invitation to Questionnaire
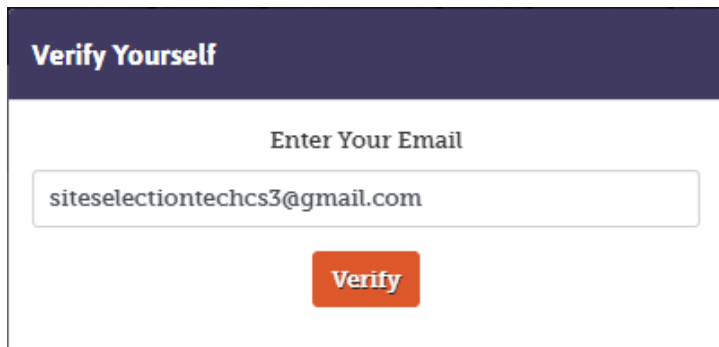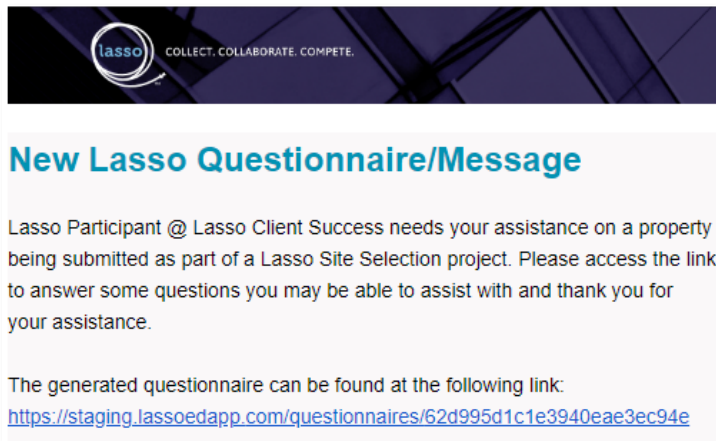
1.   Email Invitation – If you are invited to participate in a Questionnaire, you will receive an email from Lasso App at lassoedapp.com. To accept the email invitation and proceed with the Questionnaire, click the link within the email for the next steps.

2.   To Verify:

a.   As a Contributor – If you receive an invitation to complete a Questionnaire and are not registered for Lasso, enter the email address your invitation was sent to, to verify and receive access.

b.   As an Existing Participant – If you have previously registered for Lasso, you will be asked to login with your existing credentials and will be redirected to the Questionnaire.

Contributors: Completing a Questionnaire

1. Questionnaire Details – Review the Project information, including the Project Description and Project Attachments, if applicable.

2. Question List – The Question List consists of all questions that have been requested by the Participant to be completed by the Contributor. Click on a question to expand and submit a response. Once done, click "Save" to save your responses.

Note: Questions can be expanded to enter a response by clicking on each question individually, or by clicking on the "+" and "-" buttons to the right of the Question List.

3. Complete My Questionnaire – Click "Complete My Questionnaire" to notify the Participant you have finished submitting your responses.

Note: Contributors can access the Questionnaire at any time prior to completion. Confirm you have submitted as many responses as possible prior to completing the Questionnaire.

Participants: Reviewing and Updating Contributor Responses

1. **Questionnaires** – When viewing a Project Property, Participants can scroll down below the Questions section to review any Questionnaires sent to Contributors.

2. **Status** – A Questionnaire's status is indicated based on the Contributors activity.

   a. **If Sent**, an invite has been sent to the Contributor but they have yet to submit any responses to the Questionnaire.

   b. **If Reinvited**, multiple invites have been sent to the Contributor but they have yet to submit any responses to the Questionnaire.

c. **If Working**, the Contributor has accepted the invitation and is actively submitting responses to the Questionnaire.

d. **If Finished**, the Contributor has completed the Questionnaire and provided as many responses as possible.

3. **Actions**

a. **View** – Allows Participants to view a Questionnaire and responses submitted at any time. Participants can update or add responses

b. **Delete** – Allows Participants to delete a Questionnaire, effectively expiring the Questionnaire link for the Contributor. Responses saved by the Contributor will remain intact following the deletion of a Questionnaire.

4. **Viewing Questionnaires** – Click "View" to be redirected to the Questionnaire. Participants are encouraged to review and update responses as needed. Click "Go to Property" in the top-right corner to return to the Project Property screen.

Note: Responses submitted to a Questionnaire will update automatically upon a Participant refreshing their screen. Alternatively, Participants can click on the Answers button above the Categories header found in the Questions section of the Project Property screen.

Congratulations, you have successfully collaborated on a project.
Thank you for your participation.