

Electronic forms processing with PerfectForms

Make electronic forms and capture form-based information for automated, advanced processing using PerfectForms in connection with Document Locator.

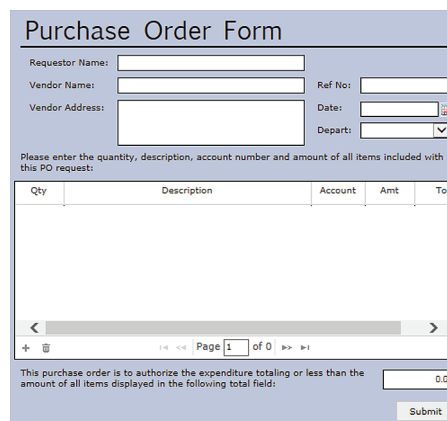
PerfectForms makes it easy to create electronic forms of all types, from the simple to the sophisticated. Information is conveniently captured directly from users, eliminating all need for manual data entry or scanning later on. Everything is imported directly into Document Locator and can be used to kick-off document form-driven workflows.

- Build and deploy electronic forms to capture information
- Automate form-based business processes
- Make simple or sophisticated forms without knowing any HTML or writing any code

Forms drive efficiency

Forms drive business activities of all kinds. From Accounting, to HR, to Quality and Compliance, forms are an organized way to collect information from people. Whether employees are filling out purchase order request forms, vendors are submitting change order forms, or customers are updating status forms; forms of all types help standardize how information is received and processed.

Electronic forms are a more efficient alternative to processing paper-based forms. Electronic forms save time in the capture of data and improve the efficiency of processing after data is received. Individuals self-submit their own data into the form electronically, eliminating the need for manual data entry of information that is received. Information is captured directly into the document management system, where it is immediately available for electronic reviews and approvals. There's less risk of delays, fewer data entry errors, and the chance of losing information is virtually eliminated.



Electronic forms are a more efficient alternative to paper-based forms processing.

Benefits

- **Electronic forms**
Create electronic forms of all types and make them available online or offline.
- **Advanced processing**
Capture a permanent record in the document management system, and process form submissions in sophisticated workflows.

Solutions

Customize forms for use in every area of business. Here are some examples:

- Work orders
- Change orders
- Admissions
- Inspections
- Applications
- Performance reviews
- Expense reporting
- Time sheets
- Incident reporting
- Purchase requisitions
- Purchase orders

(800) 298-1172
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Easy form building in PerfectForms

- Create forms with an easy “What You See Is What You Get” (WYSIWYG) form builder
- Drag and drop individual form objects to create custom forms
- Embed video, captcha, and other form objects
- Design forms with logos, images, and colors to reflect your own brand
- Publish forms online or internally

The PerfectForms form builder makes it easy to build electronic forms of all types.

The power of forms and document management

Capturing form submissions directly into document management multiplies the advantages of electronic forms processing. Once a form entry is submitted, form data can be used to automatically generate a PDF file – a permanent record inside the document management system. The file can be searched, placed into workflows, managed according to records policies for compliance, and more.

- Capture form data directly in Document Locator
- Render form data as PDF files, creating a permanent record in the document management system
 - Search and retrieve PDF form submission files
 - Route form submission files in automated workflows for document-style reviews and approvals
 - Manage form submission files according to records policies, in compliance with regulations and audit controls
 - View reports and monitor form submissions and form processing workflows

Related Features

- **Document Workflow**
Automate business processes.
- **Notification Subscriptions**
Set actions based on subscribed events.
- **Records Management**
Maintain compliance using records policies.
- **Searching**
Instantly locate documents based on full-featured search technology.
- **Review and Approval**
Route submissions for electronic reviews and approvals.