

Web eForms Add-on

Docsvault's eForms add-on allows customers to create web based forms within their DMS system to collect and process various information and to create dynamic documents. You can now handle electronic forms in a secure, effective and efficient way without having to use the old manual ways of filling out paper forms. Easily create custom forms with various field types like text boxes, drop down lists, radio buttons, checklists as well as preformatted fields like address, phone#, signatures, etc. and share them within and outside your organization for workflow and data collection purposes. Get notified about new form submissions and set a corresponding workflow process in motion immediately. Moreover, repetitive documents like contracts, lease, agreements, etc. can now be created automatically just by filling out few necessary form fields.

With eForms, you can simplify your business processes by gathering critical data quickly and more effectively. This helps you lower the cost of handling collected data. What's more, you can promote a "greener environment" in your organization by having a seamless and paperless data collection process.

Highlights

- ✓ Drag & Drop Web Form Builder – Build Forms within minutes. No programming knowledge needed
- ✓ Add your logo and brand your forms easily
- ✓ Easy Embed options available to host the form on your website or simply share the link with your users
- ✓ Responsive Design allows perfect view of your forms on Desktop browsers as well as smart phones and tablets
- ✓ Custom submit behavior to display desired button text, unique submission IDs, email confirmations, etc.
- ✓ Use multiple types of preformatted field controls and validations to make data collection intuitive and error free
- ✓ A formula control table enables users to make simple on form calculations to create simple expense reports, simple orders, etc. It can also be used for collecting data in a tabular format

Solutions

- *Better Processes*
Improve collection and processing of information and requests. Auto create complex and length documents with the simplicity
- *Improved Intelligence*
Improve intelligence of departments, product and other aspects of your business with gathered intelligence and analytics
- *Security & Control*
Stay on top of collected critical information with notifications and controlled access.

Related Features

- *Document Profiling*
Set custom index fields and enter index values when creating a folder or importing a document for easy categorization, search and retrieval.
- *Document Capture*
Capture data from various sources and store it in a centralized location for easy organization and management.

- ✓ Simple arithmetic calculations can be performed on any numeric fields
- ✓ Option to auto populate current date in the 'Date' field
- ✓ Assign a predefined date format for a Date field
- ✓ Formula can be set on a 'Date' field to add numbers of days.
- ✓ Protect your forms from spam bots with CAPTCHA option.
- ✓ Special Terms & Conditions and Signature controls make it possible to get authorizations using mouse, digital pen, finger, etc. on any device.
- ✓ Allow users to upload files along with their forms.
- ✓ Drop any Docsvault profile index field onto your eForms. Supports text, numerical, date, static lists as well as Users/Groups index fields.
- ✓ Allow saving of uploaded files only without creating a main form document on form submission
- ✓ Create a custom message or redirect users to another page on your website for increased user engagement and conversion.
- ✓ Create Field Rules to dynamically hide/show specific fields and set values based on value selected in another field on your form
- ✓ Receive instant email notifications on form submission
- ✓ Convert forms to PDF documents on the fly and use captured data to index, name and store the document
- ✓ Create dynamic Word, Excel and PDF documents based on captured data. Excellent for creating repetitive documents.
- ✓ Preview individual entries in detail. Share comments and discuss the data collaboratively with your team
- ✓ Preview all your entries and use search criteria to browse through your entries faster
- ✓ Export and download your data into any popular format for further analysis. Export collected entries in xls, doc, pdf or csv formats
- ✓ Create custom reports based on submission entries
- ✓ Preserve a log of all data along with date, time stamp, user name, related documents etc.
- ✓ Usage & Entries Analytics – View the usage statistic for your forms. View the report by day, month, or year
- ✓ Easily manage the staff in charge of your forms. Involve different teams from your organization in the data gathering and analysis process
- ✓ Trigger automatic workflows on form submissions
- ✓ Secure access to any form based on users and/or their groups
- ✓ Set Form accessibility by setting expiry dates as well as 7 days availability on schedule with specific times for each day

What It Means For You?

Docsvault's Web eForm add-on is a versatile tool that can transform your outdated paper-centric forms process into an electronic and paperless process. You can not only design and create electronic forms in a span of few minutes but also organize the crucial data securely in your Docsvault document management system for easy access, retrieval and analysis.

The benefits and uses of Docsvault's Web eForm add-on are endless as you can now use the gathered information not only for faster and more accurate processes but also for intelligent data analysis.

What's more, you can seamlessly integrate these forms with your Docsvault document management software and thus support major compliance and security mandates.

Easy Form Management

You can now handle forms as easily as you would your regular documents. Simple online form creation tools give you the power to share forms using links or seamlessly embed your forms on your own website.

Intelligent Report Generation

What is the point of having accumulated data when you can't create reports that can benefit your business processes? Docsvault allows you to query your forms data in many different ways and export out results for further reporting so that your e-forms translate into e-intelligence. Customized reports can also be shared with others using simple share links.

Fast Facts

1. You can save forms as PDF for record keeping purposes as well as collect form data for future analysis
2. Once submitted, process your forms for further approvals and reviews in a workflow for quick decision making.
3. Map form filed values to form document's profile in Docsvault
4. Route workflows to dynamic users automatically based on user selected value on the form
5. Notify different users about form submissions based on selected values on the form