Xpertdoc | Better documents. Faster.
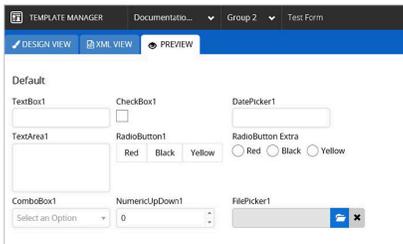
Xpertdoc Smart Forms
The Better, Faster, Guided Digital Form Solution

Web-based, Dynamic Data Capture

Xpertdoc's intuitive Smart Forms are responsive, web-based or embedded data capture forms that enable your customers to easily enter and submit their information electronically, through a better, faster and guided process.

By exchanging manual, paper-based and error-prone processes for a digital version, you benefit from lowered resource costs, improved internal efficiencies and memorable customer experience.
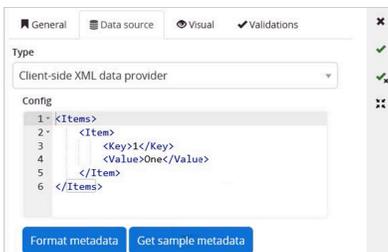
Smart Forms' Key Features

Configurable Web Forms
Configure functions such as data fields, check-off options, dropdown menus, date pickers, and sub forms. Fields and options can be tagged as mandatory and be accompanied by dynamic in-process guidance.

Advanced Business Rules
Configure logic-based business rules to control information presentment; relevant options are displayed based on input provided by customers.
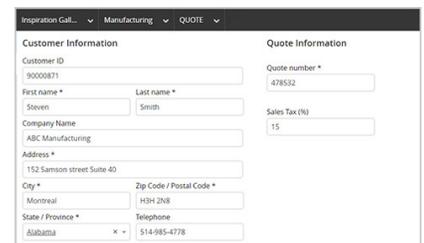
Dynamic Data Sources
Link dynamic lists of data – products, pricing, options, etc. – pulled from your enterprise core systems to dropdown menus embedded in Smart Forms.

Dynamic Data Capture
Captured data can be directly fed into your enterprise core systems, such as Microsoft Dynamics 365/CRM, ERP, CPQ, Excel, policy administration, and more. Auto-completing fields can pull input stored in connected systems.

Embedded Multimedia Content

Incorporate informative multimedia content to explain and promote additional products and services, options, etc.
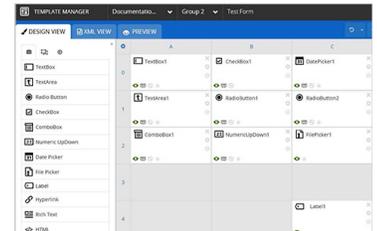
Work in Progress Saving

You can work on a Smart Form, save your progress intermediately and continue at a later time until form completion.

Responsive Design

Leveraging HTML5, Smart Forms are responsive and easily accessed with any mobile device or computer. Your customers can start a data capture process from one device and finish on another, in a seamless and consistent experience.

Intuitive Design Interface

Build Smart Forms tailored to your needs using an intuitive design interface that leverages drag and drop capability.

Integrated e-Signature

Capture electronic, legally-binding signatures in minutes, on any device, with native e-signature support.

Omni-channel Delivery

You can deliver completed Smart Forms through your customers' preferred channel, including email, HTML, SMS, fax, and print.

Xpertdoc™
Better documents. Faster.

Contact us at **info@xpertdoc.com**, **1-866-961-9111** or **+32 52 52 27 70**.

www.xpertdoc.com