



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 faster, better 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.

Customer Information

Customer ID
90000871

First name * Steven Last name * Smith

Company Name
ABC Manufacturing

Address *
152 Samson street Suite 40

City * Montreal Zip Code / Postal Code * H3H 2N8

State / Province * Quebec Telephone 514-985-4778

Improve user/customer experience with quick and easy information entry

Boost internal efficiencies with digital, streamlined data capture process

Reduce costs associated with paper-based form processing

SMART FORMS' POWERFUL FEATURES



Configurable Web Forms

Configurable functions include 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 to simplify the process.



Dynamic Data Sources

Dynamic lists of data pulled from enterprise core systems can be linked to dropdown menus embedded in Smart Forms, ensuring accurate information such as products, pricing, options, etc. is displayed.



Dynamic Data Capture

Captured data can be directly fed into enterprise core systems, such as Microsoft Dynamics 365/CRM, ERP, CPQ, Excel, policy administration, and more. Auto-completing fields can pull input stored to make entering information faster, easier and error-free.



Embedded Multimedia Content

Incorporate informative media content to clarify, explain and promote additional products and services, or available options.



Omni-channel Delivery

Completed Smart Forms can be delivered via omni-channel options, including email, HTML, SMS, fax or print, ensuring customers receive the outputs through their preferred communication channel.



Advanced Business Rules

Logic-based business rules can be configured to control information presentation based on input provided by customers. Relevant options are displayed, reducing confusion and improving customer experience.



Intuitive Design Interface

Featuring an intuitive design interface and "drag n' drop" capability, Smart Forms can be built and tailored quickly and easily.



Responsive Design

Leveraging HTML5 for a responsive experience, Smart Forms are easily accessed with any mobile device or computer. A data capture process can be started from one device and finished on another, providing a seamless and consistent experience.



Work in Progress Saving

Work on Smart Forms can be saved intermediately and continued at a later time until form completion.



Integrated e-Signature

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