



Dynamic Forms Solution - White Paper

V.1.2

Keren Haberman

Contents

Why Dynamic Forms Solution?	3
Benefits Provided by the Dynamic Forms Solution	4
Key Features of Dynamic Forms Solution	5

Why the Dynamic Forms Solution?

Organizations depend on the efficient movement of information to run their businesses effectively. Inefficient business processes and manual data collection can lead to reduced productivity and costly delays. Because business information moves quickly, business users find that their paper trail needs to move just as rapidly. For organizations to optimise information processing, they need the right tools to efficiently automate their existing processes and react quickly to changes. This is a primary objective of the Dynamic Forms Solution.

Dynamic Forms enable organizations to easily collect information through application and online forms and process the requests in accordance with defined business procedures. It eliminates the need for data entry workers keying in data from paper forms and operators no longer need to decipher handwriting.

The objective is to simplify and accelerate the collection of data and to automate the processing of that information. The Dynamic Forms solution presents users with forms that are familiar to them and allows them to fill out and submit the information electronically. This provides better control and tracking, and accelerates the delivery and processing of higher quality information.

Dynamic Forms Solution Benefits

- ✓ **Reduce Costly Paper Handling and Manual Routing**
Paper based forms are costly to print, store, distribute, mail, and process. Automation of form processing ensures that there is no disconnect between the form and the business process required for that form.
- ✓ **Track, Audit, and Process Awareness**
Instant access to current and prior activity, including completed forms and electronic signatures, ensures that authorized users have immediate access to the information they need to assist in the everyday decision-making processes. Having visibility into the forms entire lifecycle reduces cost, improves quality, and speeds-up the flow of vital business processes.
- ✓ **Accelerate the Delivery of Form-Based Information**
CRM Workflows automatically route completed forms to the appropriate users for review/approval.. The routing can interact with external systems and provides automated email notifications and personalized task lists.
- ✓ **Reduce Errors and Improve Accuracy**
Pre-population of form fields from the CRM application enables users to input only the required data. Fewer areas to populate reduces errors and form field validation ensures accuracy.
- ✓ **Expedite the Collection of Quality Information**
Presenting users with Dynamic Forms that are similar to their paper-based predecessors eases participation in the form completion process and improves the quality of the information collected. Integrated form help, field pre-population and instant validation improve the end-user experience and reduce expensive support calls
- ✓ **Integrate with the Microsoft CRM Dynamics Suite**
The Dynamic Forms Solution is fully integrated with Microsoft CRM Dynamics. As a fully integrated solution, Dynamic Forms brings data that was once populated manually and filed externally to one central place. Data can be searched, accessed and reviewed in a quick and intuitive manner.
- ✓ **Work Offline**
The Dynamic Forms Solution can be available even if there is no Internet connection. Users working outside an office environment can continually populate Dynamic Forms, accept Electronic Signatures, save the form as a PDF, etc.

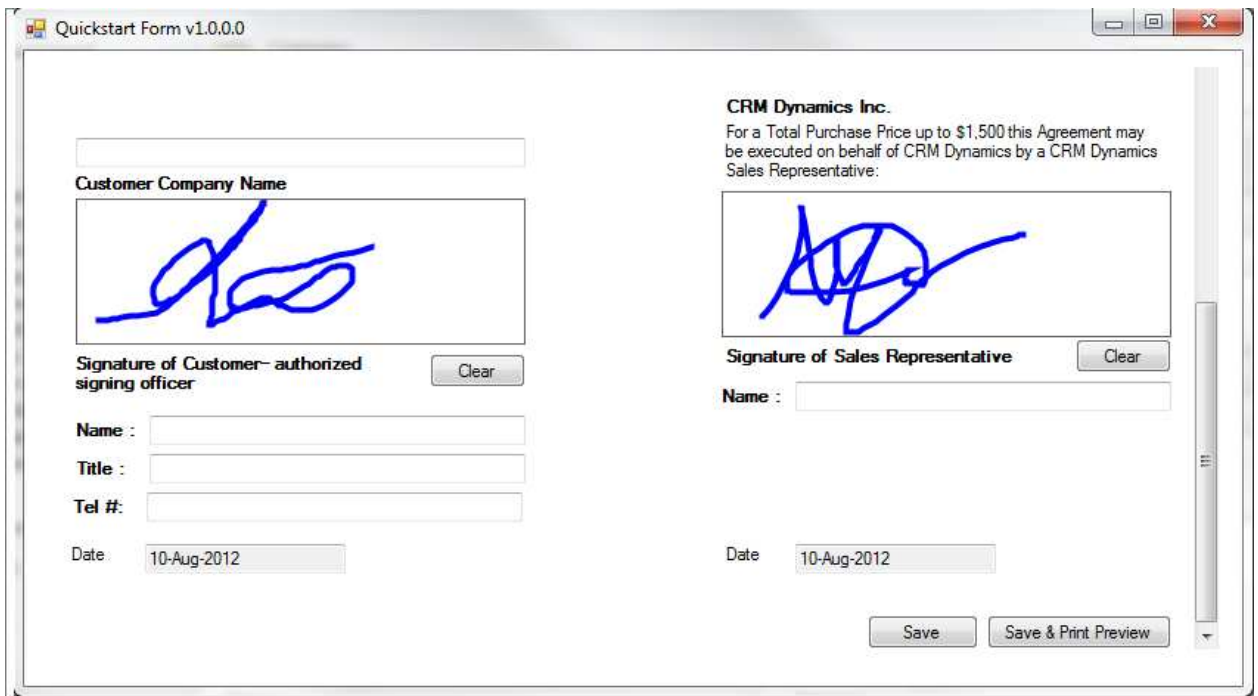
An important business benefit of the Dynamic Forms Solution is its ease-of-use and rapid deployment. Presenting users with forms they are already familiar with and leveraging email to drive process automation eliminates the need for costly training. Context sensitive forms, embedded help, and form segment isolation further eases in the simplicity, acceptance and deployment of the Dynamic Forms Solution.

Key Features of the Dynamic Forms Solution

- **Electronic Signature Capture**

Dynamic Forms Electronic Signatures brings the convenience of signature capture to any PC, tablet, or mobile device without the requirement of external hardware.

Customers can sign agreements, managers can authorize completed form, etc.

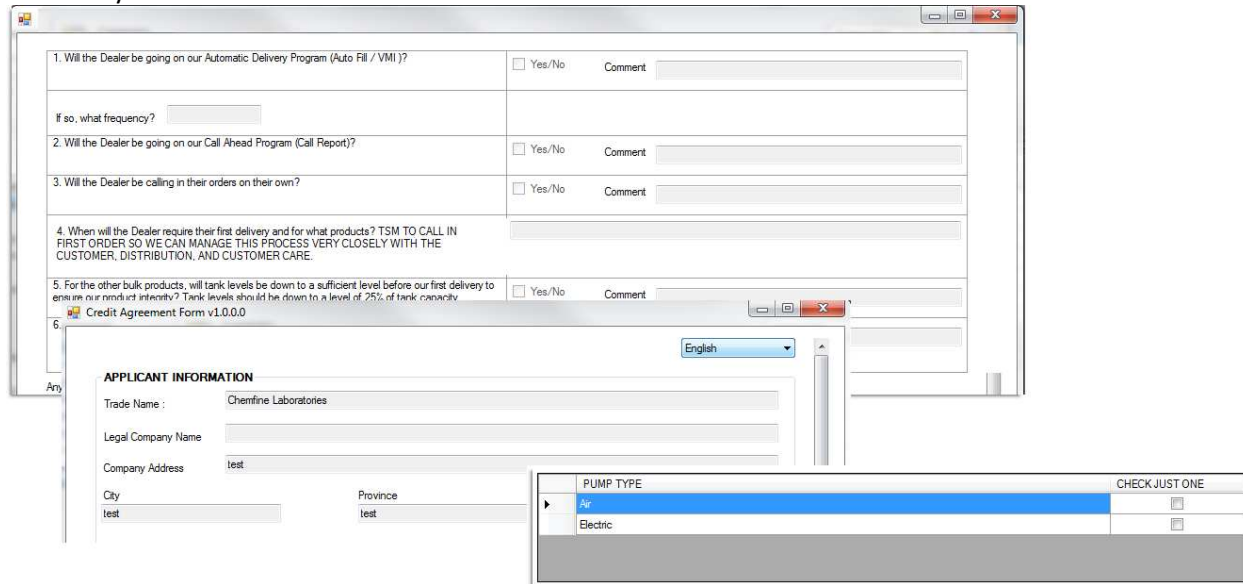


The screenshot displays a web-based form titled "Quickstart Form v1.0.0.0". The form is divided into two main sections for signature capture. On the left, under the heading "Customer Company Name", there is a text input field, a signature capture area containing a blue ink signature, and a "Clear" button. Below this are fields for "Name:", "Title:", and "Tel #:". At the bottom left, a "Date" field is populated with "10-Aug-2012". On the right, under the heading "CRM Dynamics Inc.", there is a block of text: "For a Total Purchase Price up to \$1,500 this Agreement may be executed on behalf of CRM Dynamics by a CRM Dynamics Sales Representative:". Below this is another signature capture area with a blue ink signature and a "Clear" button. Underneath is a "Name:" field. At the bottom right, a "Date" field is populated with "10-Aug-2012". At the very bottom of the form are two buttons: "Save" and "Save & Print Preview".

- **Flexible Field Format**

Dynamic Forms supports various field entry and display formats (free form text, Y/N questions, date specific fields, check-boxes, etc.). Data can be validated and automatically populated (where applicable) for a quicker response and more reliable data:

CRMD: Dynamic Forms Solution



The screenshot shows a dynamic form window with several sections:

- Section 1:** "1. Will the Dealer be going on our Automatic Delivery Program (Auto Fill / VMI)?" with a Yes/No checkbox and a Comment field.
- Section 2:** "2. Will the Dealer be going on our Call Ahead Program (Call Report)?" with a Yes/No checkbox and a Comment field.
- Section 3:** "3. Will the Dealer be calling in their orders on their own?" with a Yes/No checkbox and a Comment field.
- Section 4:** "4. When will the Dealer require their first delivery and for what products? TSM TO CALL IN FIRST ORDER SO WE CAN MANAGE THIS PROCESS VERY CLOSELY WITH THE CUSTOMER, DISTRIBUTION, AND CUSTOMER CARE."
- Section 5:** "5. For the other bulk products, will tank levels be down to a sufficient level before our first delivery to ensure our customer's interests? Tank levels should be down to a level of 25% of tank capacity" with a Yes/No checkbox and a Comment field.
- Section 6:** "6. Credit Agreement Form v1.0.0.0"

Below these sections is an "APPLICANT INFORMATION" section with fields for Trade Name (Chemfine Laboratories), Legal Company Name, Company Address (test), City (test), and Province (test). A dropdown menu is open, showing "PUMP TYPE" with options "Air" and "Electric", and a "CHECK JUST ONE" column with checkboxes.

- Offline Access**
 Dynamic Forms are designed to support offline access. Using the Windows Dynamic Forms version, users can continue accessing forms even if there is no Internet connection.
- Save, Print, Send**
 Forms can be saved in various formats, emailed and attached to the CRM record:

