

Capture Information, Digitally Transform and Automate PDF Forms

XEROX DOCUSHARE
PDF FORMS ADD-ON
CAPABILITY

Revolutionize the way you work with forms with Xerox® DocuShare® Flex.

Despite their central role in an estimated three-quarters of business processes, * PDF forms can be as frustrating today as they were 20 years ago. Redundant, time-consuming, error-prone — have you stopped to ask if there must be a better way of doing things?



Paper forms and manual data entry may be the norm in most organizations. But they don't have to be. It's time to update forms to meet the demands of the modern workplace—with a paperless process that's as streamlined and efficient as the rest of your business.

PDF FORMS FOR XEROX® DOCUSHARE® FLEX

PDF forms for Xerox® DocuShare® Flex is an optional add-on designed to transform your processes by eliminating the time, costs and inefficiencies of paper forms and manual data entry.

- Replace static, error-prone paper PDF forms with fully digital PDF Forms
- Create completely paperless processes for everyday business activities such as requests and approvals, purchase orders, onboarding and submitting applications
- Create slick, personalized, mobile-friendly PDF forms with comprehensive and intuitive design and publishing tools
- Capture data and attachments from employees, customers, and other users accurately with a complete audit trail
- Submit forms from the office or on the go, enabling mobile work processes
- Re-populate information to new forms by chaining them together, automatically triggering a next process—such as following new employee onboarding by ordering a laptop

HERE ARE SOME OF THE RESULTS WE'VE HELPED OUR CLIENTS ACHIEVE:

At a public university, students gain efficiency with online forms.



7x more applications for student services are now submitted annually



60% of files submitted via mobile device



Less manual data entry and fewer mistakes have improved the university's data and improved user experience



No more waiting to submit an application—students have more time

xerox™

Let's automate your approach to forms.

Filling out forms doesn't need to be a headache. With our solution, you can digitize a process in days, go paperless and make data collection effortless.

Create a Webform to automate a process—in a snap.

Drag-and-drop fields to move them easily up and down, arranging them on the form.

Data Sources – Add auto-fill fields and picklists of data values from CRM, ERP, and other company systems.

Palette – Select items to build and style your forms, such as checkbox types, messages, images and logos.

Using PDF forms to design and style forms for your unique business requirements will help users fill out forms more efficiently to trigger the right processes.

The screenshot shows a software interface for editing a form template. At the top, it says 'EDIT FORM TEMPLATE' and 'Files / Files / Form Templates / ABC PO Sample'. Below that, it indicates 'Step 2 of 3: Build the form.' The main area is divided into three sections: 'DATA SOURCES' on the left, 'PALETTE' at the bottom left, and the form preview on the right. The 'DATA SOURCES' list includes 'Purchase Order ID', 'Purchase Total', 'Status', 'Request Date', 'Customer ID', 'Customer Name', 'Customer Phone', 'Customer Address', and 'Customer Contact'. The 'PALETTE' contains various form elements like Dropdown, Radio, Checkbox, Section, Repeat, Tabs, Panel, Table, Message, Link, Trigger, Signature, Form Viewer, Text, TextArea, Date, EMail, Money, Phone, Quantity, Number, T/F, Image, PageBreak, and ComboBox. The form preview shows a 'Purchase Order' form with fields for 'Purchase Order ID', 'Purchase Total', 'Status', 'Request Date', 'Customer ID', 'Customer Name', and 'Customer Phone'. A 'print' button is visible above the form. The bottom of the interface has buttons for 'Test Form', 'Save Form', 'Cancel', 'Previous', and 'Next'.

DESIGNED WITH THE WAY YOU WORK IN MIND, PDF FORMS FOR XEROX® DOCUSHARE® IS AS INTUITIVE AS IT IS EFFECTIVE.

Now, with PDF forms, create exactly the forms you want:

- Customize them with your company logo
- Add design elements
- Quickly define fields that capture data
- Define picklists of options
- Use data lookup of values from an ERP or data system, such as customer ID or purchase order number
- Chain forms together to start a different process based on options selected

Quickly capture critical content, enforce business rules, and empower your employees to automate processes to adapt to new requirements for digitization and efficiency.

WE CAN HELP IMPROVE THE WAY YOU WORK.

Let us put our experience in automation and our technology expertise to work accelerating your processes, enhancing efficiency and making it less tedious to fill out forms.



TRANSFORM YOUR WORKPLACE.

Stem the tide of documents flooding your office and enhance how you work with document capture, document automation, and cloud-based sharing made easy. Agile and adaptive, **Xerox® DocuShare® Flex** Content Management Platform can help organizations of any size achieve lower costs and higher results.

Learn more at: xerox.com/ecm

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