



Eforms Wizard

The Vaultview E-Form Wizard is an interactive application, a user interface that guides the user through business processes such as [new account opening](#), new employee on-boarding, or any process that uses several forms to complete a given procedure.

The Wizard uses E-Forms to replace multiple hardcopy forms through business rules logic. These E-Forms function as templates consisting of data fields. Each space or blank on the form or check box becomes a data field. As the form is completed, data is entered into each field. The resulting data can then be pushed to any CRM, ERP, or other Line of Business application



Features	Benefits
Pre-population	Form fields can be pre-populated using key reference data to pull related data from multiple databases
Business rules	Prevents creation of erroneous and incomplete documentation
Database integration	Data pulled from existing databases using account number or other fields will eliminate data entry errors and increase efficiency
Application integration	Data pushed to existing databases will eliminate redundant data entry and provide close integration with existing line-of-business applications
Direct uploading	Forms not needing customer signature can be uploaded directly into electronic workflows
Signature flexibility	Forms requiring customer signature(s) can utilize electronic signatures or can be printed, signed, scanned and uploaded to electronic workflows; these forms may also be saved as PDFs, emailed to the customer for signature, and returned for scanning into the archive
Flexibility	Accept, reject or reassign single or bulk workflow tasks
Design customization	Customize the look and feel
Fast	Gathers client information and existing database information simultaneously
Cost reductions	Reduces scanning, printing, shipping, and supply costs