

what's new ?

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What is it: Email link to form is a workflow step that emails a URL link to a non-system profile user allowing them to become part of the required workflow. The URL link allows the form participant to log-in to the form and complete the form section designed for their input and electronically sign it. When the user completes their needed input, the form continues through the workflow cycle.

Who needs it: Customers with forms needing outside actions/information after the initial form submission. Example: College Financial Aid forms needing parental input after student submission; CPA Forms needing customer signature after tax preparer completion.

what's improved ?



What is it: Live Scan enables rapid scan and attaching of supporting paper based documents such as personal records, invoices, and contracts to be viewable during a form workflow and archival.

What is new: Scanning interface now has batch scan mode for easy multiple document scanning.

Who needs it: Customers with forms that require supporting documentation at any step of the workflow process. Example: HR-Onboarding requirements including proof of citizenship, drivers license; Loan application forms requiring personnel tax records, appraisal documents, etc.



Live Pay

What is it: Live Forms payment portal transfers your customer to a payment processor portal such as Herring Bank or PayPal for a secure payment process and full payment reporting. Live pay form control communicates with the payment portal and returns needed payment receipt information to the form.

What is new: Updates to Live Pay to accommodate payment processor security updates.

Who needs it: Customers with forms requiring payment processing to automate the business process. Example: Sumer camp registration form; request for college transcripts; goods or service order forms.

<http://www.dbsgroup.net/live-forms/>

