

DocStar Forms

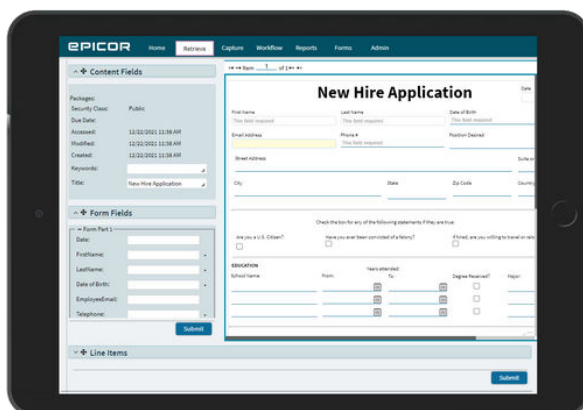
Goodbye, paper forms. Hello, smart workflow.

Any Form, Anywhere, Any Time

Paper forms that are scanned or re-keyed into your database cause loss of data, efficiency, and profitability. Fillable PDFs help bridge the gap between paper and true e-forms, but without real-time workflow integration, you're missing out on a truly paperless process. With DocStar Forms, easily build custom forms with drag-and-drop technology—no need for IT, complex coding, or expensive third-party resources. Your teams can access DocStar Forms on any device, and integration with your existing line of business software allows for automated notifications of workflow assignment to help ensure faster, more efficient processing across every department.

Easy to Use, Secure Forms Processing

Once your form has been published, it can be updated and edited (with the proper permissions) and data can be imported from other line-of-business systems and then routed to the right person, at the right time, eliminating mistakes, enabling completeness of information, and reducing operational costs.



Web-browser interface enables form design and entry on your choice of devices.

- Remove the cost of printing, storing, and distributing pre-printed forms—and the waste of obsolete forms
- Complete forms faster and easier with automatic formatting, calculations and data validation
- Shorten approval cycle times with workflow routing via email
- Integrate data with core business systems to eliminate data entry errors and improve productivity

+ DocStar® Forms

Benefits

Easy to use drag-and-drop forms builder

Auto-populate data from other systems

Permission-based security

Automated email alerts for form status

Workflow triggers automated processes

Send forms to external users for completion

Integration with any ERP and CRM system

Ability to apply JavaScript to perform complex calculations

Group related forms for guided, efficient entry

Do Much More Than Just Fill in the Blanks

Field Validation features enforce required field entries and more. You can enter conditions to be evaluated, like summing line-item prices and displaying a total, or true/false conditions that require additional detail filled in when a box is checked. It has conditions you can set up to control the appearance or behavior of fields based on the contents of other fields. As an example, let's say an employee is filling in a computer hardware/software request form from their IT department and chooses "Hardware." A dropdown menu can display a static list of IT-approved hardware choices, or it could even be a live lookup list to an ERP or another data source.

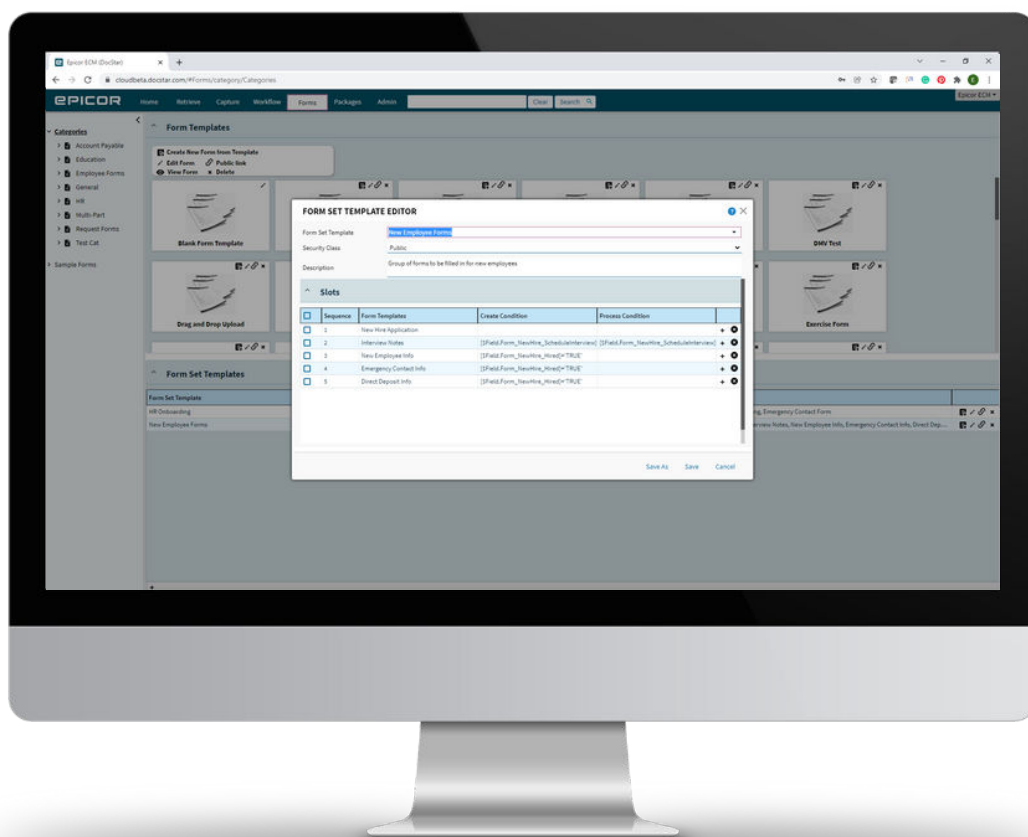
Keep It Organized

You can build Form Sets, a group of forms that can be filled in together for rapid entry; for example, onboarding documents for Human Resources such as new employee info, emergency contact info, direct deposit info, and the like. You can set the sequence in which the forms appear and help create conditions to decide which form should be

presented next, for example, if a new hire declined insurance coverage, don't present forms related to insurance. Fields can be synchronized across forms so that, for example, the person filling in the form only needs to enter their phone number once and it will appear on all the forms.

Sign on the Dotted Line

After the form or form set has been filled in and the user clicks the Submit button, the form can be programmed to present a signature box that the user can fill in with a mouse or another input device. Their signature is then stored on the form. This particular Form Signature feature serves the purpose of acknowledging receipt and form completion. For increased signature security and validation, an optional DocStar Connector for DocuSign® eSignature is available, which works within DocStar Forms. eSignature uses Public Key Infrastructure (PKI) to allow the highest levels of security and universal acceptance and allow multiple parties including external non-DocStar users to participate in a signing ceremony.



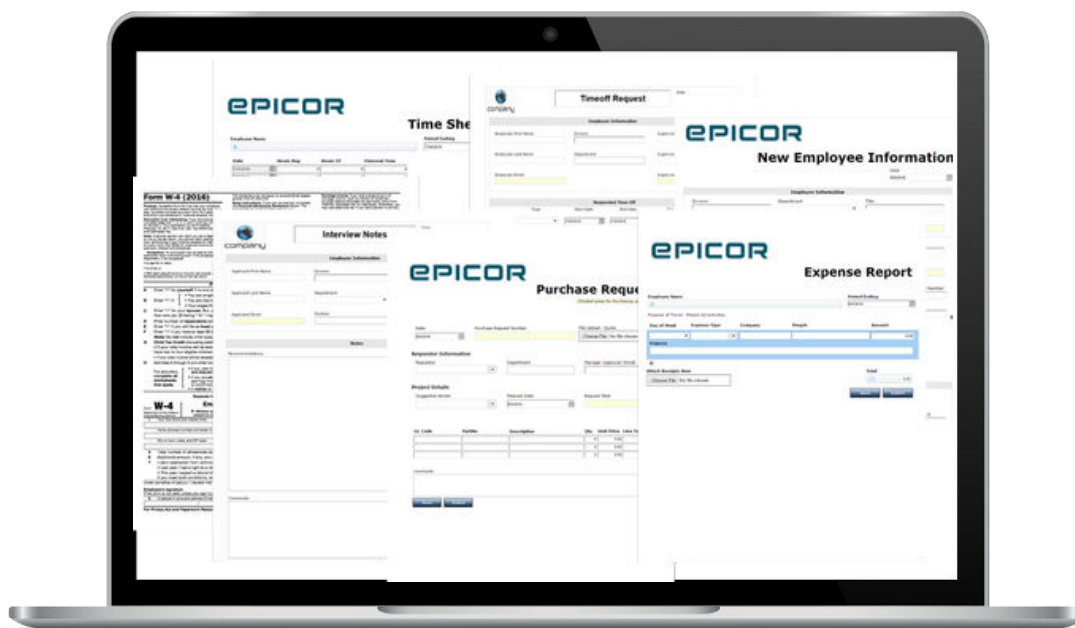
Form Sets provide guided entry through a collection of related forms.

Sample Forms Included

- Purchase request
- Time-off request
- Expense report
- Time sheet
- Interview notes
- New employee info
- W4

Requirements

Form Sets, Form Signatures, and Field Validation are features available in Forms 2.0 and higher, which requires DocStar Version 19.1 or higher. DocuSign eSignature capability in DocStar requires the purchase of a license or subscription for the DocStar Connector for DocuSign eSignature. Additionally, while DocuSign is always free to users signing documents, DocuSign charges users for premium features like requesting signatures from others, custom branding, signer authentication, and more.



An assortment of form template examples is provided.

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We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

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