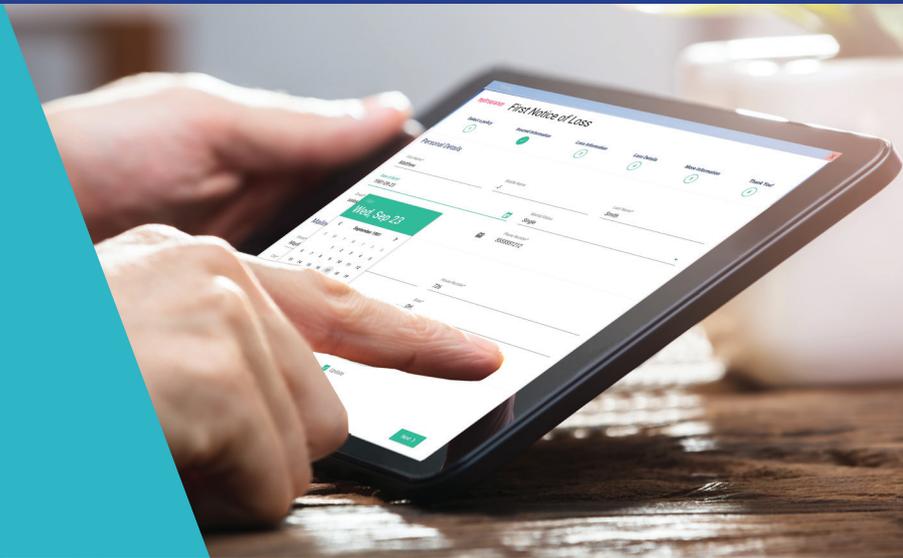# callvu

SMART DIGITAL FORMS

CallVU's Smart Digital Forms enable organizations to automate their customer workflows, onboarding processes and data collection, so that these journeys are efficient and digitized, whilst still consistent with existing processes.

Automate Your Business Processes

Forms are often the most important aspect of the customer's digital journey. Bureaucratic and time consuming, the slow manual processes of static documents can result in laborious back-and-forth processes and high rates of customer abandonment.

Dramatically streamlining and easing the process of outbound sales, client onboarding and customer management, CallVU's Smart Digital Forms provide automated, dynamic and powerful tools for constructing digital forms, processes and workflows. Whether the objective is to promote a sale, enhance enrollment or provide proactive customer care, digital forms reduce the hurdles involved in completing processes. Customers can view the entire process for getting a job done, in self-service directly on their smartphone or over a shared session with an agent. Customers can upload supporting documentation, provide digital signatures and complete a form between different devices or programs without losing data.

Simplifying all types of digital process management, CallVU's Smart Digital Forms achieves greater results in sales, support, and operations, while qualitatively enhancing customer satisfaction.

Solution Offerings

Simplify customer onboarding

Automate service tasks

Simple drag and drop functionality

Convert legacy forms

Share forms across digital channels

Scan documents and upload images

Publish forms in any format

Save & continue later functionality

Multi-signature compatibility

BENEFITS

Easy and User-Friendly
New forms can be created using a simple 'drag-n-drop' feature or by using purpose-built templates

Converts Legacy Forms
Existing forms can be converted to different formats, so they're optimized to whichever device is being used

Dynamic and Responsive
Forms can be created and filled out across multiple platforms (web, tablet, smartphone). They can be published in multiple formats, be it web forms, mobile wizards or PDFs

Secure
Forms can be saved and transferred safely with masking capability

Single-Source Publishing
Once a smart digital form is filled out, it is accessible from across all channels, allowing for a seamless continuity of service

Enhanced Support
The smart form can be integrated with the agent portal, so that the customer and agent can work through a form together

The Smart Digital Forms module is part of CallVU's Digital Customer Engagement Platform which includes Collaboration and Content Sharing, Visual Conversational IVR, Visual IVR, and Management & Analytics modules.
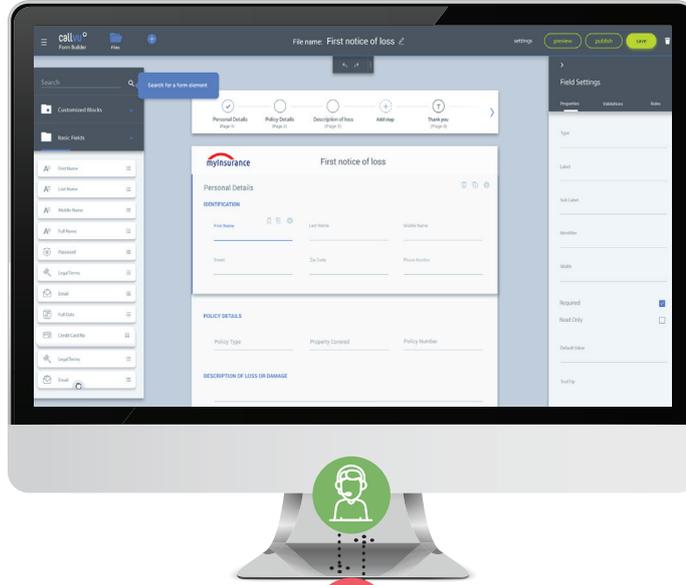
callvu

Revolutionize Operational Processes with Smart Digital Forms

CallVU's Smart Digital Form solution is ideal for enterprises who are seeking to expedite their organizational processes while dramatically improving the quality of their customer service. Organizations can easily create new forms or update existing ones, transition from paper or rigi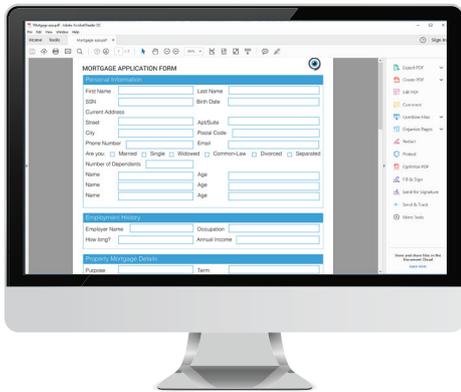d PDFs to a fully dynamic form-generation and distribution tool. They can publish complete forms over any device, even during a live call. Smart Digital forms are available as a stand-alone solution, or can be used to complement CallVU's product suite, by enabling a coherent digital process that can be completed in real time.

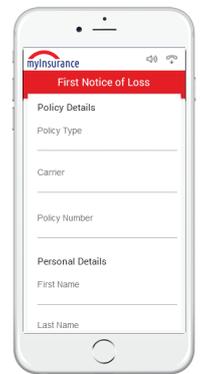### Single Source Publishing

Form Builder

Example of publishing varieties

PDF displayed on a computer

Mobile wizard displayed on a tablet

Web browser displayed on a mobile phone

Features

- Edit existing forms or create new versions
- Easy Drag & Drop functionality
- Wide variety of editing capabilities
- Provide instructional filling-in tips
- Conditional field visibility
- CRM synchronized auto-fill
- Multiple signatories
- Auto-save
- Stop and continue later functionality
- Upload a drop down list of field value options
- Accessibility enhancement for visual impairment

Technical Specifications

- Web service installed on premise or on cloud
- Forms created over this service are published to the Agent Portal or available over any webs services managed by the client.
- Runs on secure multi-layered architecture

About CallVU

CallVU addresses the business need of diverting customers to digital self-service. Taking advantage of CallVU's Digital Engagement Platform, our customers can reduce pressure put on contact center agents, ensure higher usage of digital content and offer enhanced customer experience.

For further information about CallVU solutions and services contact:
Email: info@callvu.com | Website: callvu.com