

SMART FORMS



Smart Form Toolkit allows you to configure personalized DocLink UI for collecting data used to process and approve your documents, quickly see related documents, and even generate new ones.



DOCUMENT CREATION

Users can create documents that are indexed and submitted directly to the DocLink repository. The user can also browse related files and index them into DocLink at the same time.



DOCUMENT PROCESSING

Users can enter information into a Smart Form to assist in the processing and/or indexing of a DocLink document. The user can also easily see a list of related documents.



COMMON USE: NEW VENDOR REQUEST

When you need to have a new vendor setup in your ERP, use a Smart Form to generate the request which can be routed for approval and handling with related backup documents.

“DocLink has created some unexpected operational efficiencies and oversight for us. We’re able to break down and understand business processes that we’ve never had any visibility into before.”



COMMON USE: CARD STATEMENTS

Import credit card CSV data and transform it into individual statements for each cardholder. Statements are immediately indexed and, after coding and approval, the transaction data can be imported directly into the ERP.



COMMON USE: HR ONBOARDING

The onboarding process has many steps and associated documents. Use a Smart Form to enter and track data and to quickly view and capture additional documentation for employee files.



COMMON USE: EXPENSE REPORT

Capture receipts and use a Smart Form to create an expense report. Immediately capture it into DocLink and, after coding and approval, import its data directly into the ERP, eliminating errors and duplicated data entry.