COLLECT MORE DATA WITH FORMS

FORMS 2016 TECHNOLOGY FEATURE

Forms offers increased flexibility and an intuitive way of getting more information into Therefore™. One key benefit is the faster, more reliable entry of information into the system. By providing a familiar look and feel for users and a structured format, Forms makes it easy to input, process, and measure relevant, validated data.

CANON SEE IMPOSSIBLE

WHY FORMS?

The concept for form functionality arose from several different market needs. In essence, Forms can provide a way to get validated data into Therefore™ to take advantage of its information workflow and analytics tools. For example, hosted Forms can automate the collection and saving of external data into Therefore™, without any additional input. By designing highly customized forms directly in Therefore™, administrators save time by not needing to configure other tools for passing form data to the archive. Users benefit from more efficient data input, and simple mobile data entry is guaranteed.

TECHNOLOGY CONCEPT

Starting with Therefore™ 2016, administrators will be able to design highly customized forms in the Therefore™ Solution Designer. A Therefore™ Form is a visualization of an index data dialog designed using the expanded category designer, which now includes options for adding images, colors, fonts, and more. The forms concept is based around two levels of access: authenticated and unauthenticated. Authenticated users are those with a Therefore™ log-in and license. They can access, complete, and submit forms using either the Therefore™ Navigator or Therefore™ Web Access. Unauthenticated users are external parties who don't have a Therefore™ log-in; they can enter and submit data by accessing a Therefore™ form hosted on a public website.

USE FORMS: CUSTOMER SATISFACTION SURVEY

In today's competitive and interconnected market, companies must be highly attuned to their customers' needs and reactions. Dissatisfied customers lead not only to decreased sales, but also to negative publicity and a damaged company reputation.

In order to measure Key Performance Indicators (KIPs) related to customer experience such as staff reaction times, product quality, and net promoter score, the company in the diagram below has decided to collect and analyze this information using forms created in Therefore™.

After a customer has received an order or service, a link to a satisfaction survey is sent out. In this scenario, the survey is a Therefore™ form hosted on an external website. The customer can enter data into the form, even as an unauthenticated user. Once the data is submitted, a workflow can be started to review each case. More importantly, in this scenario a report has been configured to collect the results of the survey and regularly send them to the head of the customer service department for analysis.

By using this functionality, this valuable data is secure, traceable, and centrally archived. The company can maintain a clear overview of the KPIs it's achieving and those areas that need improvement. From a user perspective, filling out the survey is simple and quick, resulting in higher customer participation.

Customer Purchase → Survey Sent to Customer → Submit → Store in Therefore™ → Process Data → Measure KPIs

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