

# FormIQ Intelligent Docs Product Guide



FormIQ's Intelligent Documents solution combines the power of digital forms and electronic signatures, creating a seamless and efficient process for generating, managing, and executing documents. Merge data into agreements and applications, ensuring accuracy and ease of use.

- **Enhance Accuracy** - Minimize errors by automatically merging form data into documents.
- **Streamline Workflows** - Combine form filling and signature processes into a single, efficient workflow.
- **Increase Productivity** - Reduce time spent on document creation and execution, freeing up resources for other tasks.
- **Ensure Compliance** - Maintain compliance with a secure, transparent, and auditable process.
- **Gain Insights** - Leverage real-time analytics to make informed business decisions.

## FormIQ Intelligent Documents Product Overview:



**Configurable Forms**



**Dynamic Document Generation**



**Enterprise Level Security**



**Integrated E-Signature Solution**

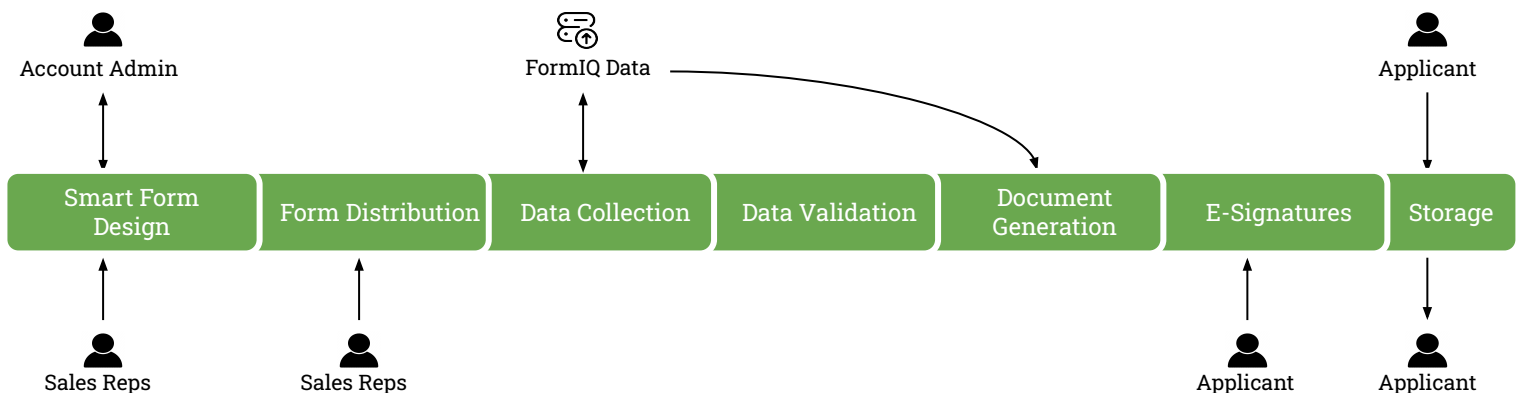


**Mobile-First User Interface**



**Cloud-Based Platform**

## FormIQ Intelligent Docs Workflow



Revolutionize your document management with FormIQ's Intelligent Documents solution. Contact us today to learn more or schedule a demo [www.formiq.ai](http://www.formiq.ai)

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## Benefits and Features

### Integrated Form & ESignature Solution

Combine custom digital forms with secure electronic signatures in a single workflow.

### Data Merge Capabilities

Automatically populate documents with data collected from digital forms, reducing manual entry and administrative errors.

### Dynamic Document Creation

Create dynamic documents that adapt based on user input and predefined rules.

### Secure Signature Execution

Ensure documents are signed securely with robust authentication and encryption protocols.

### Audit Trail and Compliance

Maintain a comprehensive audit trail for all document activities to meet legal and compliance reporting requirements.

### Customizable Templates

Design and store application and agreement templates for frequently used documents, streamlining the creation process.

### Workflow Automation

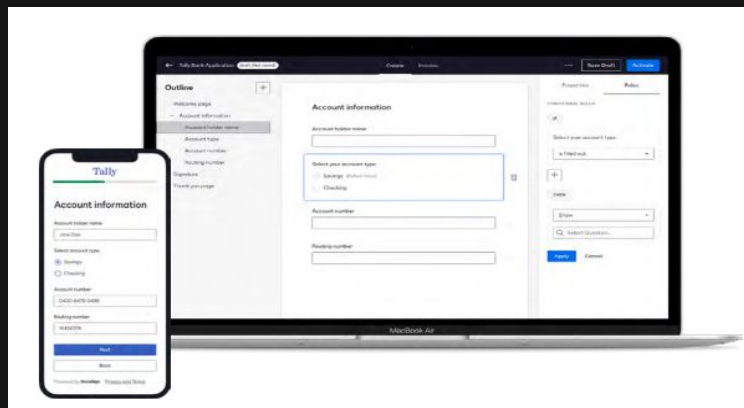
Automate the review and approval process, ensuring documents are completed efficiently.

**Get Started with FormIQ's Intelligent Docs Solution!**

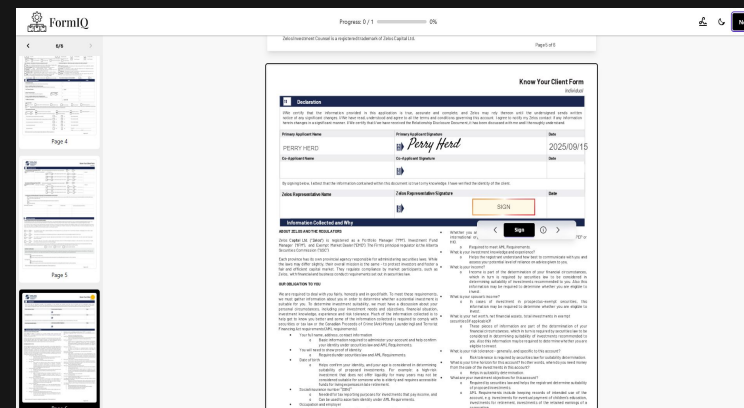
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FormIQ



ID	Client	Managing Team	Issued On	Account Status	Outstanding
104	Melanie Wells Approved Client - Institutional (melanie.wells@formiq.ai)	DEMO	Wed Jul 16, 2025 05:53:49	Completed, verified	—
103	Andrew Inatt Approved Client - Institutional (andrew.inatt@formiq.ai)	ANDR	Tue Jul 15, 2025 17:56:00	Completed, verified	—
102	Andrew Clientatt Approved Client - Institutional (andrew.clientatt@formiq.ai)	ANDR	Tue Jul 15, 2025 16:57:18	Completed, verified	—
118	Oliver Hillman Client - Institutional (oliver.hillman@formiq.ai)	DEMO	Tue Jul 15, 2025 11:02:06	Outstanding, under review	Complete Review
117	Melvin Capp Client - Institutional (melvin.capp@formiq.ai)	DEMO	Tue Jul 15, 2025 04:02:24	Outstanding, under review	Register New Review
116	Alice Country Client - Institutional (alice.country@formiq.ai)	DEMO	Tue Jul 15, 2025 05:48:16	Outstanding, under review	Client Signature
115	Martina Davis Client - Institutional (martina.davis@formiq.ai)	DEMO	Tue Jul 15, 2025 05:39:08	Outstanding, under review	Register New Review
114	Ann Swin Client - Institutional (ann.swin@formiq.ai)	DEMO	Tue Jul 15, 2025 05:05:19	Outstanding, under review	Complete Review
113	Kin Ferguson Client - Institutional (kin.ferguson@formiq.ai)	DEMO	Thu Jul 10, 2025 11:10:56	Outstanding, under review	Register New Review



ID	Name	Managing Team	Issued On	Account Status	Outstanding
101	Randy Orton Registered Representative	DEMO	2025-05-11 01:52:11	Completed, verified	—
100	Curtis Jackson Registered Representative	DEMO	2025-05-11 00:06:12	Completed, verified	—
099	Andrew Remy Registered Representative	DEMO	2025-05-10 17:06:21	Completed, verified	—
098	Riley Cynn New Account	DEMO	2025-05-10 04:19:37	Completed, verified	—
097	Vladimir Dorena New Account New Account	DEMO	2025-05-04 23:56:00	Completed, verified	—
096	Michael Goodrich Registered Representative	DEMO	2025-05-02 04:21:16	Completed, verified	—
095	Mark Nicksen New Account	DEMO	2025-05-02 06:59:52	Completed, verified	—
094	Gilbert Bing Compliance Supervisor	DEMO	2025-05-02 04:21:01	Completed, verified	—
093	Mark Michaels Registered Representative	DEMO	2025-05-02 04:25:46	Completed, verified	—
092	Harriet Grayson New Account	DEMO	2025-05-02 04:21:09	Completed, verified	—