

FormIQ Smart Forms Product Guide



FormIQ's Smart Forms solution revolutionizes data collection with custom digital forms, providing a user-friendly and efficient alternative to manual PDF workflows and traditional paperwork. Configure, distribute, and manage data collection with dynamic forms that adapt to your business needs.

- **Improve Data Accuracy** - Reduce errors with interactive forms that guide users through the correct input process.
- **Enhance User Experience** - Provide a seamless and convenient form-filling experience on any device.
- **Increase Efficiency** - Automate routine tasks and streamline data collection, saving time and resources.
- **Gain Insights** - Analyze form responses in real-time to make informed business decisions quickly.
- **Ensure Compliance** - Introduce process visibility, audit trails, and centralized storage.

FormIQ Smart Forms Product Overview:



Configurable Forms



Intelligent Business Logic and Rules



Data Synchronization



Integrated E-Signature Solution

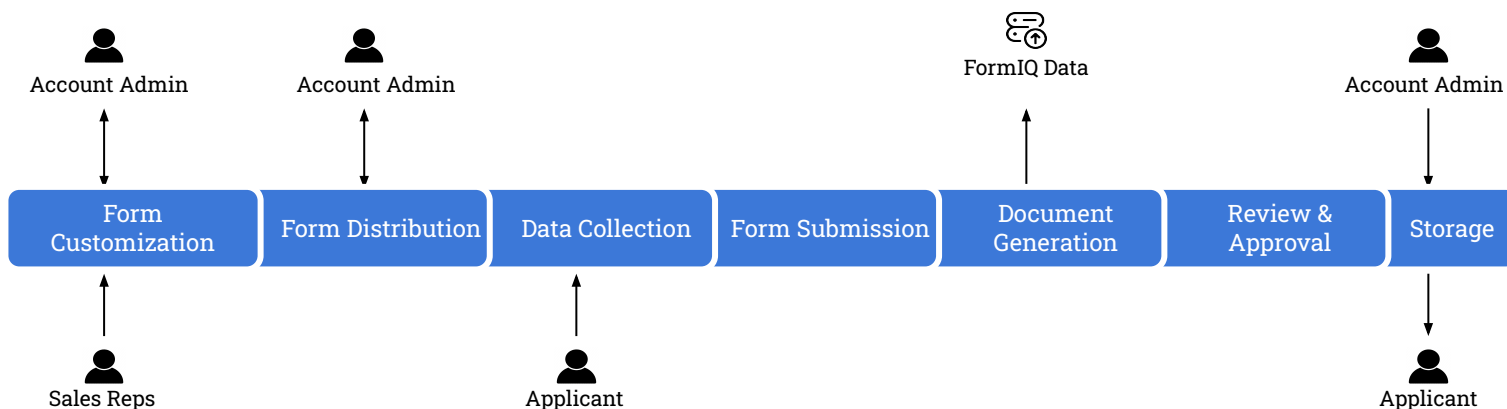


Mobile-First User Interface



Cloud-Based Platform

FormIQ Smart Forms Workflow



Transform your data collection process with FormIQ's Smart Forms solution. Contact us today to learn more or schedule a demo www.formiq.ai

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Benefits and Features

Custom Form Builder

Easily create custom forms with a drag-and-drop interface, tailored to your specific requirements.

Conditional Logic and Rules

Implement conditional logic to create interactive forms that adapt based on user responses, improving data accuracy.

Mobile-Responsive Design

Ensure forms are accessible and easy to use on any device, enhancing user convenience.

Real-Time Data Collection

Collect and analyze data in real-time, providing instant insights and feedback.

Automated Workflows

Automate follow-up actions based on form submissions, such as sending confirmation emails or triggering approval processes.

Secure Data Storage

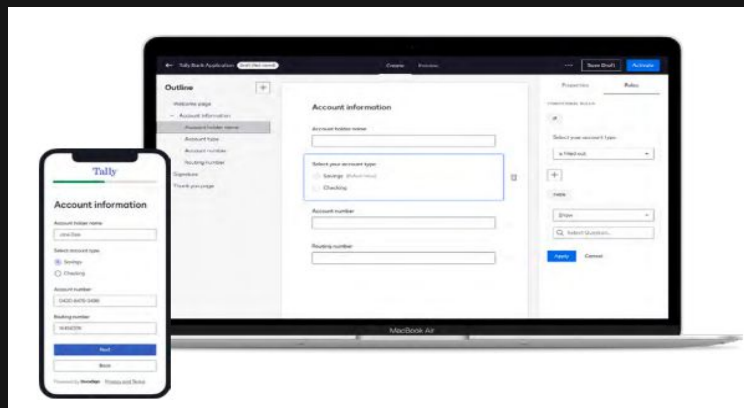
Protect sensitive information with centralized, secure data storage and compliance with data protection regulations.

Integration Capabilities

Integrate with various third-party applications like CRM and ERP systems to streamline workflows and enhance productivity.

Get Started with FormIQ's Smart Forms Solution!

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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	—
918	Oliver Hillman Client - Institutional (oliver.hillman@formiq.ai)	DEMO	Tue Jul 15, 2025 11:02:06	Outstanding, under review	Complete Review
917	Melvin Capp Client - Institutional (melvin.capp@formiq.ai)	DEMO	Tue Jul 15, 2025 04:02:24	Outstanding, under review	Complete Review
916	Alida Crouley Client - Institutional (alida.crouley@formiq.ai)	DEMO	Tue Jul 15, 2025 05:49:16	Outstanding, under review	Client Signature
915	Marina Davis Client - Institutional (marina.davis@formiq.ai)	DEMO	Tue Jul 15, 2025 05:39:08	Outstanding, under review	Complete Review
914	Ann Swin Client - Institutional (ann.swin@formiq.ai)	DEMO	Tue Jul 15, 2025 05:05:19	Outstanding, under review	Complete Review
913	Kin Ferguson Client - Institutional (kin.ferguson@formiq.ai)	DEMO	Thu Jul 10, 2025 11:10:56	Outstanding, under review	Complete Review

Progress: 0 / 1 (0%)

Section: Know Your Client Form

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Form Fields:

- First Name: [Text Field]
- Last Name: [Text Field]
- Phone Number: [Text Field]
- Email Address: [Text Field]
- Company Name: [Text Field]
- Job Title: [Text Field]
- Relationship: [Text Field]
- Signature: [Text Field]
- Date: [Text Field]

Buttons: [Sign], [Cancel]

ID	Name	Managing Team	Issued On	Account Status	Outstanding
001	Randy Orton Registered Representative	DEMO	2025-05-11 01:52:11	Completed, verified	—
002	Curtis Jackson Registered Representative	DEMO	2025-05-11 00:06:12	Completed, verified	—
003	Andrew Inatt Registered Representative	DEMO	2025-05-10 17:06:21	Completed, verified	—
004	Riley Cyns New Account	DEMO	2025-05-10 04:19:57	Completed, verified	—
005	Victor Deane New Account New Account	DEMO	2025-05-04 23:56:00	Completed, verified	—
006	Michael Goodrich Registered Representative	DEMO	2025-05-02 04:21:16	Completed, verified	—
007	Mark Nicksen New Account	DEMO	2025-05-02 06:59:52	Completed, verified	—
008	Gilbert Bing Compliance Supervisor	DEMO	2025-05-02 04:21:16	Completed, verified	—
009	Mark Michaels Registered Representative	DEMO	2025-05-02 04:25:46	Completed, verified	—
010	Herbert Grayson New Account	DEMO	2025-05-02 04:21:16	Completed, verified	—