



Toplevel

Electronic Business Forms

Toplevel Computing

An overview of the benefits of computerized electronic forms.

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What is an electronic form?

An electronic form is a computerized version of a paper form. It will usually appear on the screen looking like your familiar old friend the paper form.

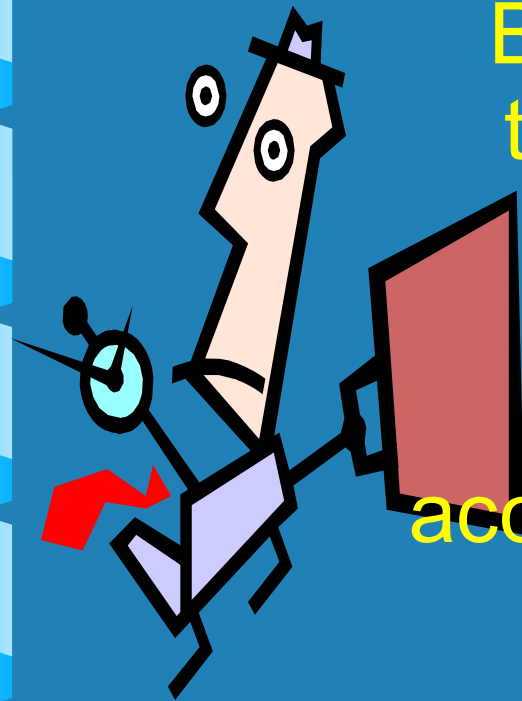
And it will print out looking like the paper form too - except that the information filled in on the form will be typed on instead of handwritten, making it more legible.



Who mainly uses "e-forms"?

E-Forms are used by all types of companies - anywhere a paper form could be used.

But they are especially relevant to heavily-regulated areas, and businesses who must keep accurate records to protect themselves in case they are accused of failing to follow proper procedures.



E-Form Applications Included

- Medical Records
- Expenses
- Timesheets
- Financial Records
- Application Forms
- Claim Forms, e.g. insurance
- Safety Procedures

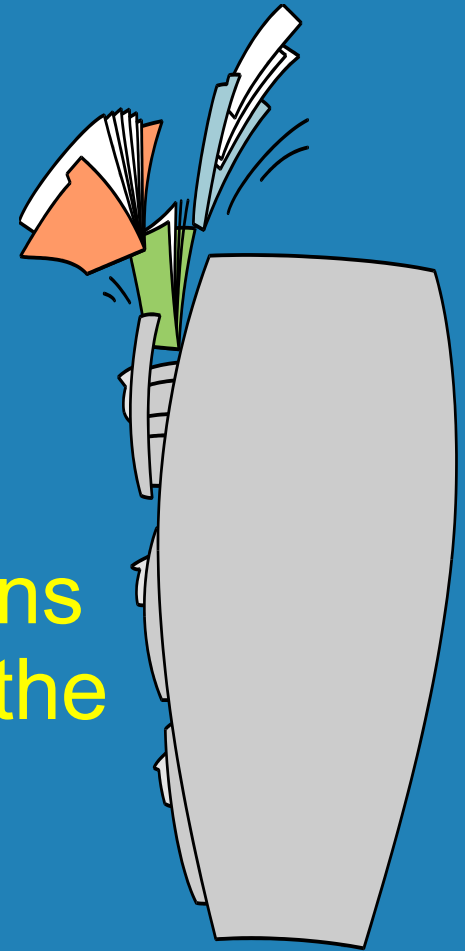
E-Form Applications Included

- Manufacturing Procedures
- Job Progressing
- Quality Control
 especially BS5750 / ISO9000
- Surveys

How they work

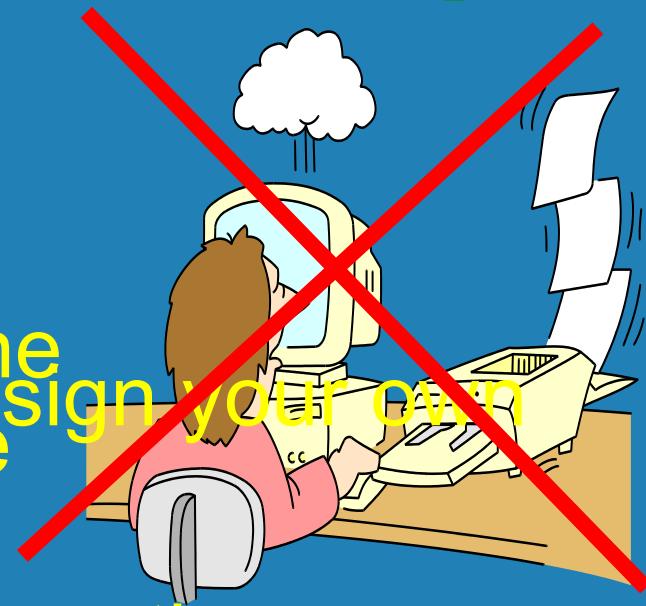
Traditionally businesses have circulated paper forms around the office and stored the completed forms in filing cabinets.

Electronic forms pass round the office on your computer screens instead. And they are filed in the computer.



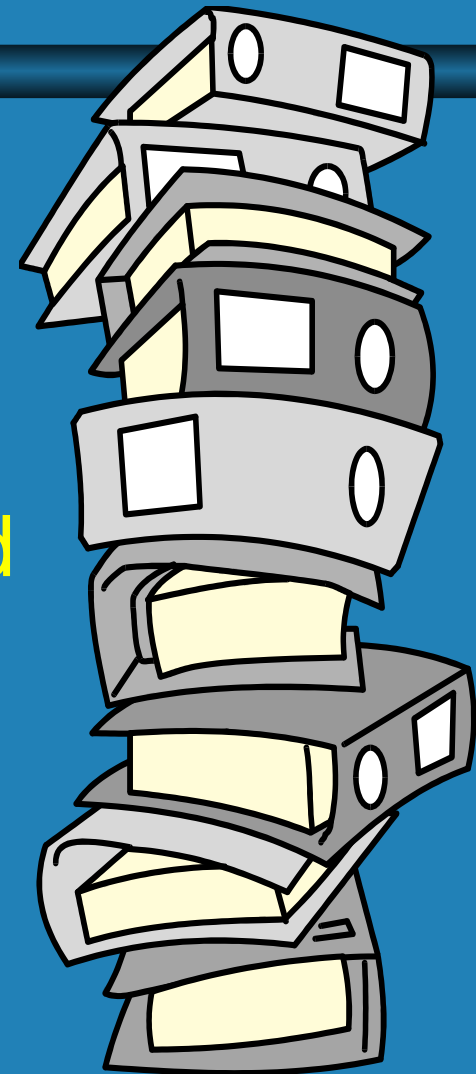
Saving Money & Trees

- You save trees, and costly paper, because you don't have to print the forms.
- Because the forms are in the computer the form can be altered at any time; for example to add another question.



Saving Money & Trees

- You no longer have to order and keep forms in bulk.
- And you don't have to throw away a whole box of old forms, just because you need to add extra questions to the form!
- You can save a lot of money.



Accuracy & Error Reduction

- “E-forms” can be set up to check the data entered onto them is right.
- For example your timesheet form can be set up to permit only certain project codes.
- Your credit application form can be set up to insist on two references.

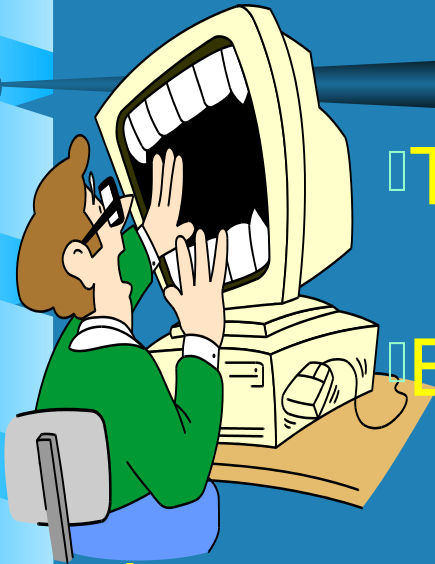
Accuracy & Error Reduction

- “E-forms” can be set up to fill in some answers for people.
- So an order form can work out the total cost.
- An invoice can automatically copy the delivery address from the invoice address.

Accuracy & Error Reduction

- “E-forms” can also help staff to carry out their work correctly.
- A loan application can be set up to remind staff that special procedures are needed for loans over £100,000.
- This form may need to go to a more senior manager for approval.

Staff familiarization



- Training can be a big problem with unfamiliar new computer systems.
- Because “e-forms” takes familiar paper procedures and computerizes them, staff find it familiar and easy.
- As far as they are concerned they're just doing the same job, but now the forms are on screen not on paper.



Where the data is stored

- You can have the data put into a file on the computer.
- That way staff can search through it easily afterwards.
- To do this they bring the form back into view and look out the one they want on screen.

Modernizing your print

- Electronic forms can also be set to pick up data from files already in the computer.
- So you can print attractive, modern forms out to send to your customers, even if the data is stored in an old system which itself is very unfriendly!

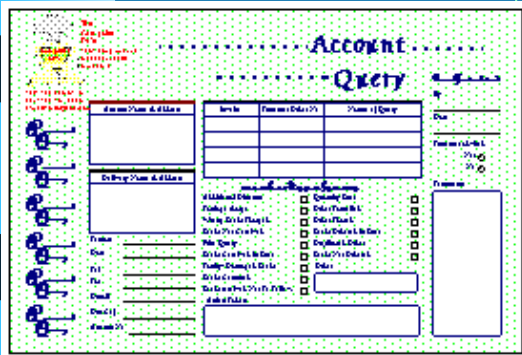
PROFORMA GOODS INVOICE

Invoice To:
Ship To:
Invoice No.:
Order No.:
Quantity:
Description:
Unit Price:
Amount:

PRO

Grid layout for items with columns for description, quantity, price, and amount.

Modernizing your print



- Because the electronic forms system picks up data from your old system you don't have to replace the entire system.
- Instead you just use the e-forms to improve the appearance of your printed data.
- This saves money and time redeveloping “legacy” systems.

Internal Forms

- “E-forms” are great for internal forms, they make businesses run smoothly.
- We’ve given a few examples in this presentation so far.

External Forms

- ▣ Some e-forms systems can now help you send forms *outside* your company.
- ▣ This adds a whole new dimension.
- ▣ Forms for customers, suppliers and prospects become part of the system.



External Forms

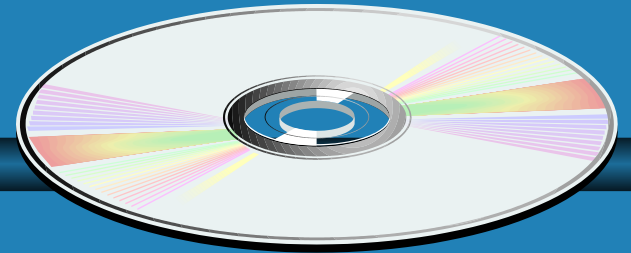
Examples of these are:-

- Order forms
- Surveys
- Application forms

External Forms

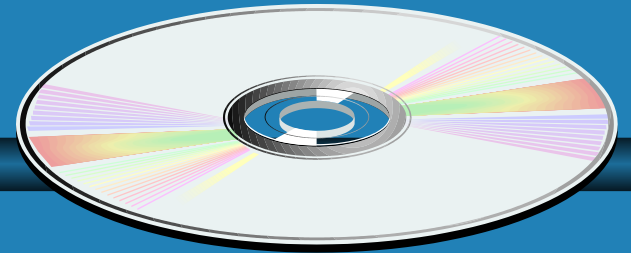
- Any customer with a PC can be given one of your forms to fill.
- And if you and the customer have an email link, e.g. over the internet, he can send the form data back to you electronically.
- No REKEYING!
- Better Customer Contact!

What's on the CD?



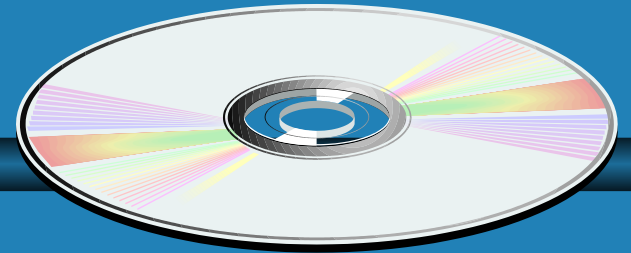
- The CD has a very simple “e-forms” application you can implement yourself.
- It contains some ready made forms for common business tasks.
- They can be automatically modified to contain your name, address and logo.

What's on the CD?



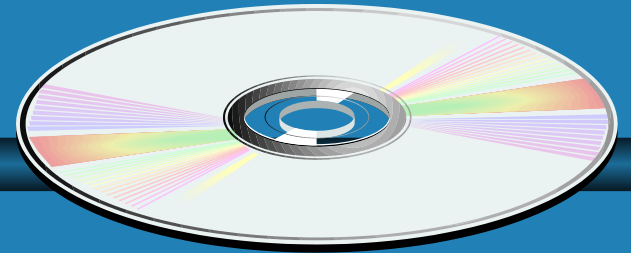
- This CD is licensed for up to 5 users to fill in and print any of the forms.
- This is a simple application, which can be set up in a few minutes.
- All the forms are predefined.
- The form data is kept simply in “contents” files on the PC; not in databases.

What's on the CD?



- There's no ability here to send forms from screen to screen electronically either.
- The CD's designed to let your staff fill in and print the forms.
- Use the CD to give you an idea of how easily your staff can start using electronic forms.

What's on the CD?



We hope you'll decide you'd like to implement a fuller e-forms system. For example with :-

- your own custom form layouts
- links to your own databases
- ability to send forms from screen to screen via email



About Toplevel

Toplevel was founded in 1984. The company specializes in electronic forms software. And we're a British company too.

Please call Evaluation Support on 01453 758248 if you would like further advice on electronic forms or information on our OfficeForms electronic forms product.

About Toplevel



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And finally. . . .



**Thank you for viewing the presentation
We hope you found it useful and
interesting**

The End