

WHAT IS PERFORM ?

Novidea provides all financial services organizations with PerForm, a fully automated forms filling and processing platform. PerForm enables the customer to populate with a click of a button multiple PDF forms of his own design or of 3rd parties including customers, business partners and vendors. It offers the customer an easy way of populating both new and preexisting forms without requiring these forms to be altered to match the structure of the data source. These forms can be from different providers and can differ from each other in terms of structure, layout and content. Built using Force.com, PerForm can populate forms with data taken from the Salesforce CRM or from any Force.com application. PerForm saves the valuable resources required by the manual filling out of forms while reducing both human error and paperwork. This in turn improves the overall productivity of the firm.



Paperless and Greener organizations:

PerForm replaces the traditional method of working with forms. By populating the data directly to electronic PDF forms, PerForm reduces significantly the need to work with printed forms. Using PerForm and electronic forms helps you to save storage space, make documentation and information sharing easier, boost productivity and minimize environmental damage.

Reduce staff and material costs

PerForm eliminates the time-consuming and repetitive task of filling out forms and replaces it with a cost-cutting single-entry process. Connecting with new business partners and supporting new types of forms is done quickly and without increasing your staff resources.

Better customer service

By eliminating the manual processing of forms, PerForm significantly reduces the operational time required to process customer requests. This in turn improves customer service, increases overall customer satisfaction and secures more new business.

Simple to use

PerForm is a fully wizard based product, which means that no coding is involved on the customer side in any of the tasks related to our product. With no need for technical knowhow, this application is suitable for the end user through a system of simplified mapping and populating wizards.



"At TheAutoMoto, efficiency is just as important to us as sales. Rather than filling out the same forms day in and day out PerForm has supplied us with a solution that allows us to automatically populate those forms with data from our CRM. With PerForm, documents such as Bills of Lading and New Dealer Applications are populated with just a click of a button rather than having them filled manually."

Stephan Attar
President
TheAutoMoto Corporation



Seamless integration with Salesforce

As a native Force.com application, PerForm provides seamless integration with Salesforce which means that it can populate any Salesforce object and related objects to your electronic PDF forms.

Fill multiple forms using a single data source

Using PerForm's multiple selection feature you can easily fill out multiple PDF forms of different layout and content using the same data source retrieved from Salesforce. This useful feature serves a wide range of business scenarios including multiple customer plans enrollment and bidding for quotes processes.

Flexible approach to support all of your form filling requirements

PerForm is provided with a variety of ready to use components that can support any specific requirement related to the automatic populating of your forms. In the real world data is rarely assigned to your forms in exactly the same way that it is stored in your back office systems. Therefore, PerForm provides ready to use components to support those cases where you need the data populated in formats that support any form's specifications.

Straight-through processing

PerForm includes a variety of capabilities designed to simplify and expedite the forms filling process. For example with PerForm's tables support you can fill out an entire table with multiple rows and columns in the target form using a single definition. This feature and many others will get you up and running with PerForm in short order.

For more information contact us at:

info@novideasoft.com
Phone: +1 857 254 8397
or visit www.novideasoft.com