

# Simplify Complex Forms with Interactive, Step-by-Step Guidance

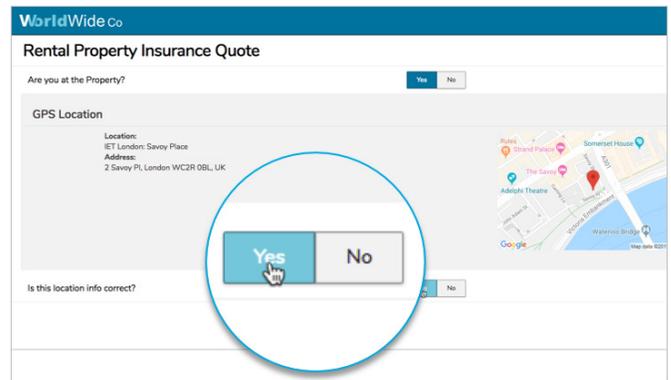
Forms are essential tools for collecting customer information and conducting business. But when you need complex information from a signer, captured from one or multiple forms, traditional paper or a PDF form is an invitation to frustration, errors, and support calls.

DocuSign Guided Forms provides a step-by-step experience to help your signers easily complete long or complex forms through questions that adapt based on previous answers. The result is a faster, friendlier experience for your signers, with fewer errors and less friction.

- Improve the customer experience with mobile friendly forms tailored for device, location, and signer preferences
- Save time and reduce errors by pre-filling forms with data from existing systems or documents
- Ask only relevant questions based on current data, prior answers, and/or dynamically calculated values
- Reduce abandonment rates with an intuitive, efficient process
- Deploy and maintain Guided Forms without depending solely on IT teams, resulting in faster time-to-market

## Better together with DocuSign eSignature

When a signer completes filling out the guided form, the answers are automatically inserted into a signature-ready agreement in DocuSign eSignature. Both products are part of the DocuSign Agreement Cloud and are seamlessly pre-integrated. That means faster time to results for you.



Streamline the data collection process through an adaptive interview based on your signer's preferences, device, and location.

## Key capabilities

### Fast and easy setup

Empower business users with simple drag-and-drop tools for designing intuitive and interactive digital experiences.

### Context-driven question generation

Skip questions, or ask different or additional questions, based on device, location, personal preferences, existing data, or answers to prior questions.

### Dynamic data population and enrichment

Bring in existing data from line-of-business systems and systems of record to pre-fill answers or return calculations.

### Mobile and user-friendly

Deliver responsive forms that resize themselves on mobile devices. Allow signers to save work in progress and finish it later, whenever or wherever it suits them.

### Universal connectivity

Leverage and deliver captured data in meaningful ways, e.g., to populate or update data sources, trigger workflows, or automate other business processes.

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## Ready for the next step?

If you are interested in using Guided Forms, please reach out to your Account Manager or call DocuSign's sales team at +1 877-720-2040.

For more information, visit the [Guided Forms web page](#).

## Use cases

Applications

Enrollment forms

Sales contracts

Change orders

Account servicing forms

Tax and other request forms

Claims processing

Dispute processing

Customer/employee onboarding

## Customers

San Diego Airport Authority

Southern Glazer's Wine and Spirits

UFCU

Vanguard

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### About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, over a million customers and hundreds of millions of users in over 180 countries use the DocuSign Agreement Cloud to accelerate the process of doing business and simplify people's lives.

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