

Simplify complex forms with interactive, step-by-step guidance.

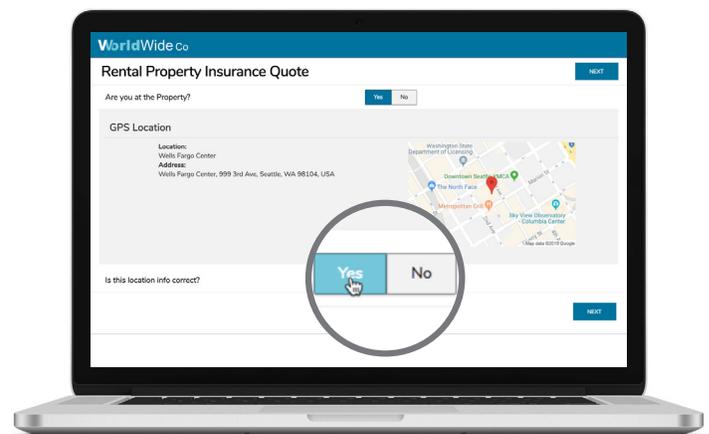
Forms are essential tools for collecting customer information and conducting business. But when you need complex information from a signer, captured from one or multiple forms, traditional paper or a PDF form is an invitation to frustration, errors, and support calls.

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.

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

Tri-counties Regional Center

UFCU

BECU

Vanguard

Philadelphia Insurance Companies

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, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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