

FlowForma Engage

EMPOWERING YOU TO ENGAGE EXTERNAL USERS IN YOUR BUSINESS PROCESSES

An award-winning Office 365® App, FlowForma® addresses your digital transformation needs by empowering business users to automate business processes with speed and flexibility, no matter what the complexity.

Sitting on the SharePoint® platform, the FlowForma Process Automation tool incorporates forms, workflow, document generation and much more, all in one place.

A proven no-code, logic only approach enables business users and Heads of Departments to quickly implement any process online. Examples range from employee onboarding to insurance policy renewals and product innovation, which increase organizational efficiency and productivity, while driving positive customer experiences.

The FlowForma Engage Add-On adds new functionality to the fundamental product features, by enabling organizations to engage external users, allowing them to submit forms and participate in workflows.

Re-Imagining External Processes

Imagine enabling external parties such as suppliers, customers and external stakeholders (including the general public) to input to your business processes? It would probably make your life a lot easier!

External processes typically have a high return on investment in an organization. However, they often involve a lot of functional compromises and require technical teams to construct and maintain.

It's with this in mind, that we innovated FlowForma Engage, a tool to enable your external users to securely and seamlessly complete steps within your business processes.

Sample Use Cases

- *Customer feedback* - allow your customers to give you feedback on your services
- *Supplier onboarding* - onboard your suppliers efficiently, ensuring that all the necessary data is captured before internal processing
- *External approvals* - allow people outside of your organization to view and approve data and documents
- *Contractors/subcontractors* - allow contractors to get onboarded and input to

processes rapidly

- *Police vetting* - allow people and businesses to be vetted before doing business with you
- *Contractor agreements* - request and record contractual agreements
- *Tender response management* - seamlessly manage responses, scoring and selection

How it Works

FlowForma Engage is a service that allows external stakeholders (e.g. suppliers, clients, even the general public) to access forms using a unique web link, that can be placed on a public website or sent in an email.

You can design processes using our no-code tool so that any step can be made accessible externally.

Engage process steps can be made anonymous or securely assigned to a specific user, using their Microsoft, Gmail or Facebook account details. When a user is completing an assigned step, they must log in to their relevant provider before FlowForma will allow them access to the step - as if they were part of your internal team, but without the need for them to have direct access to your Office 365 environment!

Example Real-World Scenarios

• Tender Process

The Challenge

A process recognized by all companies and dreaded by most, is the ever-challenging tender process. From enabling suppliers to submit their proposals and the scoring team to score suppliers seamlessly and accurately it can be a tedious task.

The Solution

With the example below, you can quickly understand how this process can be simplified.

Using FlowForma Secure Access, you can issue a tender to a specific email address for review with a unique link for the supplier to use to send in their response. When the supplier clicks on the link, the system first requests them to log in to their account (e.g. Gmail account). As soon as the log in is successful, the system displays a form allowing them to submit their response. The response is then assessed and scored by the procurement team, with maybe an additional secure step in the process for the supplier to answer queries!

Of course, a full audit trail is maintained automatically by FlowForma Process Automation throughout the entire process.

• eVetting/Police Checking

The Challenge

For many organizations, vetting of their staff or volunteers can often be a legal requirement or simply a high priority for the organization. Police vetting can often be a very slow and manual process.

The Solution

Using FlowForma Engage you can set up a form which is publicly available, empowering volunteers or interviewees to get police vetted by entering information via a public form, accessible using a URL which can be placed on your public webpage or included in an email.

The information is validated at point of entry, and forwarded on to internal resources to process in subsequent steps.

Secure access can also be used in the same process to allow third party vetting agencies access to later steps in the process.

The transition between steps is seamless and all of the information captured during the process is held in one place, whether through the external or internal process steps.

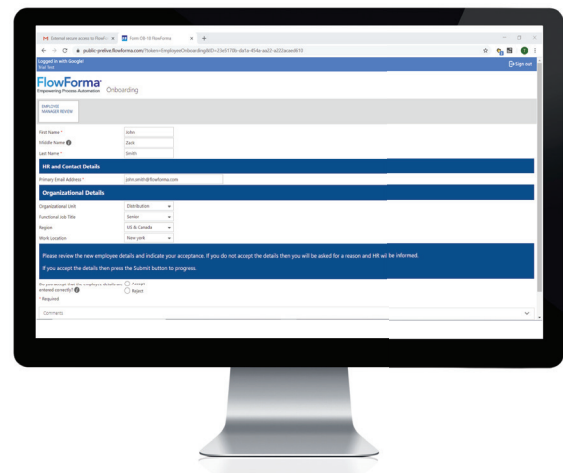


Fig 1: Secure Engage Step Example

Your Options

There are two options when availing of FlowForma Engage:

Option 1: Anonymous Forms

This option allows external users to launch a new form, or complete a step assigned to anonymous users. The system automatically presents the form in the user's web browser where they can complete the data and submit the form for processing by your internal team.

To access the form the user simply needs a link, which can be placed on your public website or sent via email.

This option is particularly suitable for processes that are initiated by the public (e.g, eVetting, visitor access, applications for products/ services).

Option 2: Secure Access

This option allows you to assign steps to individuals using their Microsoft, Gmail or Facebook email addresses. Most importantly, it does not require the user to have any direct access to your Office 365 environment (no Active Directory user account within your tenancy, therefore no need for additional security to maintain!).

This option is perfect for known external parties (e.g. client and supplier onboarding, tenders, supplier quotations, business Partner interactions).

It is, of course, possible to use both options in the same environment to facilitate, for example, anonymous client service applications followed by a secure client onboarding process and subsequent client service requests. All of these processes can be linked together, so that a complete 'cradle to grave' record of client interactions can be recorded and reported on.

Please note FlowForma Engage is available for Corporate or Enterprise + plans only.

About FlowForma

Dedicated to empowering business managers to deploy processes smarter, without any coding required, FlowForma is recognized for revolutionizing the traditional BPM market. A team of business and process transformation experts, they are passionate about innovating intuitive and affordable process automation tools for Office 365. It serves its 150,000 users from its Boston, London and Dublin offices.

A Microsoft Gold partner, it's multinational customers like, Aon, Uniphar, Grant Thornton and Grafton Group highlight how FlowForma's process automation tools are unconstrained by sector.

For further information, visit www.flowforma.com