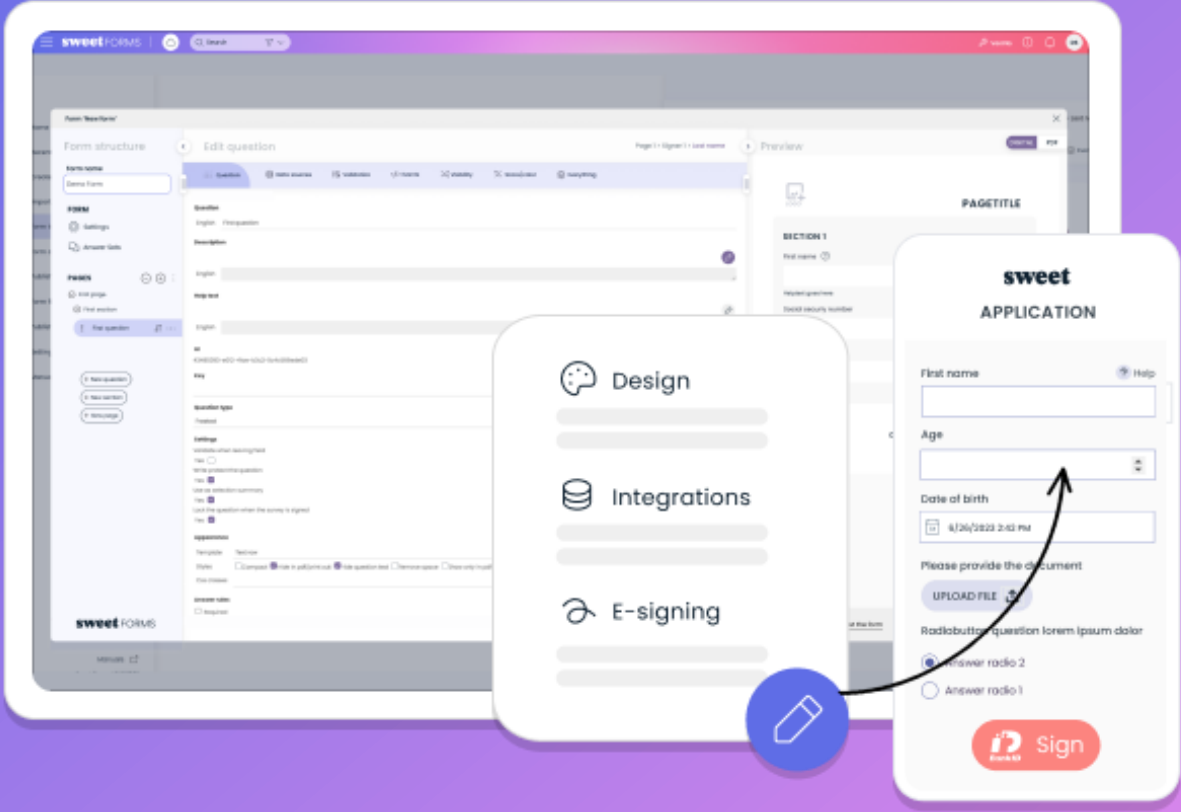


sweet FORMS

PRODUCT SHEET



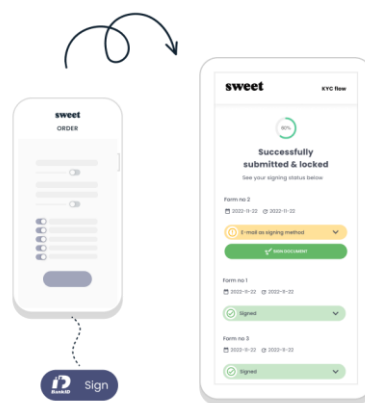
The story of Sweet Forms

We developed Sweet Forms to solve numerous of needs in a fast developing climate back in 2013. We knew that our customers spent

hours and hours to collect data from their customers, in ways that were very inefficient and had a great number of manual steps. Some customers used paper forms to collect customer information for processes like KYC, AML or to sign agreements or documents. What they complained about was the time it took to get the answers back, how they needed to ask for additional information, or call the customer with questions where they were missing answers. When they finally got all the answers, in the right format, they had to manually validate it before inputting the information into the CRM or case management system. As you might have already figured, we saw a potential to make this a bit sweeter.

We developed Sweet Forms where data could be collected digitally in the first place, and by doing so we could help the respondents to provide the right answers directly, and the need for additional information or manual validation disappeared. Several paper forms could easily be transformed into one digital form, with visibility rules that made the form appear tailored for the respondent based on their answers. As digital signing became the thing, the processes has never been this easy. The user experience leveled up and increased and on the other side the administration decreased. It was a win-win for our customers, and our customer's customers.

Today Sweet Forms is rarely used stand alone, we combine it with our rule's engine, Sweet Automation. For those who need a CRM or case management solution, we offer Sweet CRM. This combination creates true magic and gives you the opportunity to automate the way you send out, validate, handle responses and create automated processes from start to end. This saves you manpower, reduces troubles, and frees up time for your colleagues to work on more value-creating tasks.

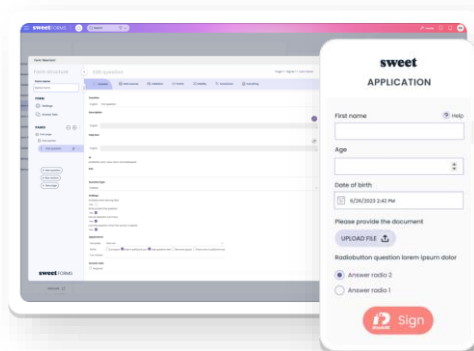


Working with forms



Sweet Forms

Experience the revolution of paperless forms with our cutting-edge digital form solution. Say goodbye to cumbersome paper forms and embrace the power of user-friendly online forms that streamline data collection with speed and consistency. How do we make it possible? We empower you with the ability to create and customize your own digital forms effortlessly. With this powerful tool at your hands, we guarantee reduced response times for forms, agreements and surveys, delivering an enhanced customer experience. Moreover, you'll save valuable time on administrative tasks and achieve way better data quality. It's not just a sweet spot, it's the real deal.



**Save time | Increase efficiency | Shorten the process | Get the right data
Increase conversion rate | Reduce time to market | Integrate | Automate**

When should online forms be used?

When you need to request information and/ or a signature that you are going to manage, read or store digitally - Sweet Forms is the platform. The use cases are many, but some of our customers use Sweet Forms

- For **onboarding** new customers, where client information and/or digital signing is needed
- To start a **service/ support** process by filling in an online form
- For **applications or agreements**, often in combination with e-sign
- For **internal processes** that requires structured, digital information together with clear instructions
- For **surveys** where you want to collect and analyze responses

Sweet offers a smart digital forms tool that empowers you to take control of your data collection processes in an automated way.

Sweet Forms

Onboarding – one of our most appreciated use cases



A form flow with three different forms as part of a onboarding process with e-signing

Onboarding new customers

Sweet Forms allows you to create a fully digital process to collect customer crucial data for onboarding your clients. The Form Designer is a Do It Yourself (DIY) form builder tool where the structure, layout and behavior is decided by you. By utilizing Sweet Forms to gather information, you can guide the customers from the start using field validation, informational text, third-party data providers, and integration with external data sources that can pre-populate the form. When the form (or forms!), is completed you can use e-sign for one or multiple parties to seal the deal. If there are attachments for the respondent to read, it's easy to upload them as part of the package.

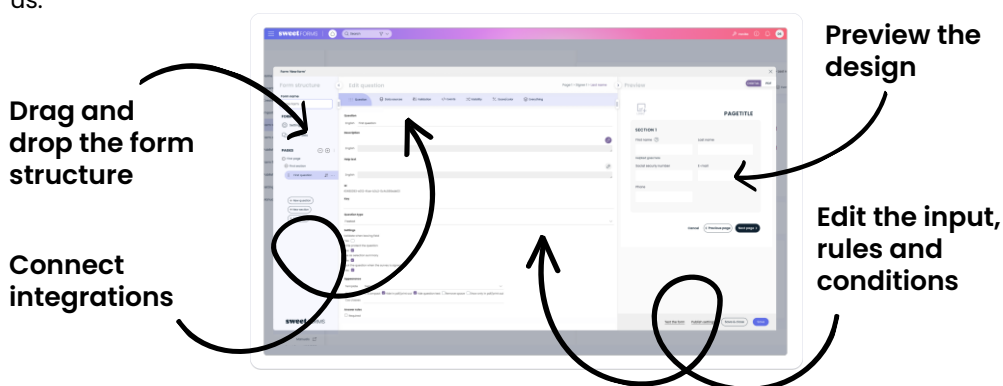
The benefits include obtaining accurate answers in the correct format that you can easily manage, saving time for both you and your customers. We suggest you define the process in our platform **Sweet Automation** where you can automate the whole process, from distribution to sending reminders or managing the responses according to predefined rules. When the rules are built, you do not need to evaluate the form answers manually, the platform evaluates the answers for you for 100 % consistency and way fewer manual steps. Onboarding customers has never been smoother.

Creating your Sweet Forms

Create/
design

Design

Customize the form structure, the format and the layout yourself. With Sweet Form Designer you can create and manage all your forms and go from paper to digital in a snap. For the full styling experience use CSS and any form can be styled your way to matching your graphical profile with logos, fonts and colors. We can offer you expertise and guidance, and there is no need-to-know CSS when you have us.



Question types

The selection of question types to choose from are many to allow you to ask the question as you like it and get answers in a correct format. These are the question types we support: Free text, multiple choice, single choice, date and time, date interval, file upload, matrix, number, score, code group and dynamic list question.

Rules

Ever came across forms with irrelevant questions and instructions like "If B, jump to question 100"? With visibility rules, you can make a generic form feel tailored to each respondent.

Pre-fill form with information

Connect data sources to automatically fill in known information, from your CRM, an external data provider or any other system or platform of yours.

Bundle several forms

Bundle multiple forms together and distribute them as a package using Form Flow. It's the simplest way to send and guide respondents to respond to multiple forms. Finish it all with e-sign if you like!

Use digital forms

Distribute

Publish

The access to a form can be limited to internal system users, defined individuals or groups, or publicly available and published on the web – it's up to you and your needs.

Security and authentication

When managing sensitive information, we suggest adding a layer of authentication to be able to open forms and answers. With our partners Scrive and Signicat, we offer authentication solutions to safeguard your forms, allowing only authorized individuals access. Your data remains protected, and you can spare yourself from headache.

Send out

The forms are easy to distribute if you don't want to publish them on the web, simply send a link to the respondent. This can of course be automated by using Sweet Automation to send the forms, once or regularly.

Remind

Reminder

Do you need to send a friendly reminder to collect answers or get a signature? Sweet Automation can handle it for you, unless you want to do it yourself. Simply set the desired timing and save yourself time and frustration.

Respond

Responsiveness

Can the form, agreement or survey easily be filled in on the shaking bus? Yes, of course. The online forms are responsive and give you the flexibility of opening it from anywhere and any device. But, Sweet Forms is not that keen on Internet Explorer – sorry, not sorry!

Sign

Digital signing

Join the digital signing revolution. Today, digital signatures hold the same legal validity as handwritten ones. Through partnerships with renowned e-signing providers like Scrive and Signicat, we offer secure and valid options for digitally signing your forms. Embrace the efficiency and peace of mind that come with secure digital signatures.

Digital Forms

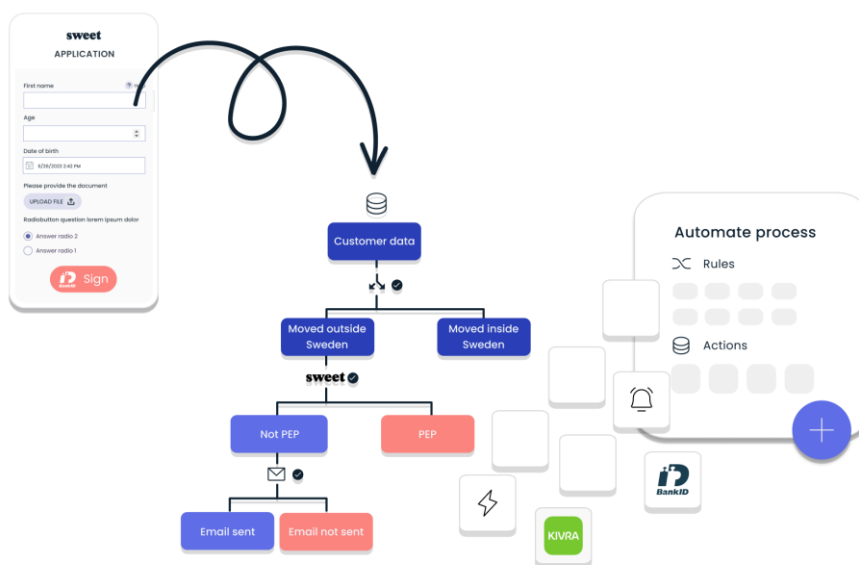
Handle responses

Handle responses

We help you streamline the handling of form responses to ensure ease and efficiency. Define automated actions for each form to ensure answers are directed to the right place and stakeholders are notified using Sweet Automation together with forms. Our highly praised Sweet Automation helps you automate the entire journey, including rules based on answers. Even if not fully automated or requiring human review, we optimize each step for time savings and improved effectiveness.

Response format

Do you need the form answers as PDF? That's available out of the box! Also, if the form is signed using e-sign we can provide you the verification of it.



Validation of data

Ensure data accuracy by automating the validation process. Use our rules engine and external information providers or use the pre-defined validation library to automatically validate customer-provided data directly, like personal numbers or phone numbers. By incorporating validation steps into your digital process, you reduce the need for time-consuming manual checks and can trust the quality of the answers.

Digital Forms

Follow-up

You can easily find how many times a certain form has been opened, and finished. All the form answers can be exported to create reports or dashboards. Sweet Forms in combination with Sweet Performance gives tremendous follow-up possibilities where the statistics of a form can be summarized and visualized. We highly recommend you use the insights and answers in a way that helps your business to grow and develop.



The product provides our business with the ability to autonomously automate and digitize customer journeys without the need for IT department assistance.

Carl Lönndahl

Director of Pension Business, Nordnet

Nordnet has increased their conversion rate a lot since the implementation of Sweet Forms together with our rules- and automations engine Sweet Automation. Also, they have saved 65 full time employees early! By being able to make adjustments and new implementations themselves, the time to market is short.

[Read more](#)

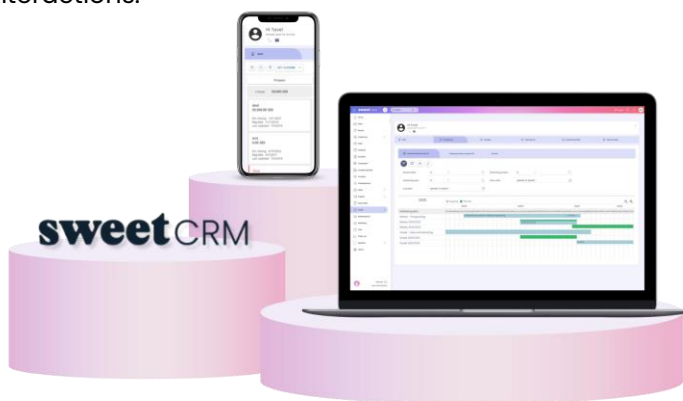
sweet

Follow-up

Sweet add-ons - CRM

When our customers come to us, they often have an issue collecting and managing information effectively. This often involves labor-intensive manual steps, delays in retrieving crucial data, the tedium of data input into the CRM, and the struggle to maintain consistency. At Sweet, we understand these issues all too well, having encountered them countless times. Fortunately, we know just how to fix them!

Sweet Forms and Sweet CRM offer a transformative solution for businesses seeking to overcome information management challenges. By automating processes, ensuring data accuracy, and simplifying customer management, you can streamline your customer journey and pave the way for business growth. Experience the Sweet advantage and unlock the full potential of your customer interactions.

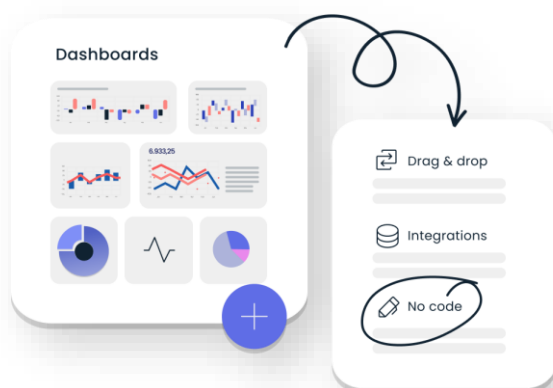


Key features

- **360° Customer view:** Sweet CRM provides a comprehensive 360° view of your customers. It consolidates all relevant data, including forms, files, agreements, support cases, interactions, and sales opportunities, into one centralized place.
- **Customer onboarding:** After onboarding a new customer, Sweet CRM ensures that the customer's information is seamlessly integrated into your CRM system. This integration simplifies the continuation of your customer journey.
- **Case management:** With Sweet CRM, you can treat each form response as an individual case and efficiently manage these cases step by step. This feature streamlines your case management process, from distribution internally, to communication and process management.

Sweet add-ons – Performance

Do you want to keep track of every form answer, or do you want to get monthly reports in an easy-to-use dashboard? Sweet offers real-time dashboards and monitoring: Stay up to date with our dynamic dashboards and real-time monitoring capabilities. Track key metrics, visualize data with customizable graphs, and gain invaluable insights into your operations.



Key features

- **Do It Yourself:** Sweet's user-friendly interface empowers you to take control. Customize your dashboards and graphs according to your unique needs, putting you in the driver's seat of your performance analysis.
- **Response Tracking:** Keep a close eye on your form responses with our comprehensive follow-up tools. Identify trends, spot opportunities, and make data-driven decisions that drive growth.
- **KPI Setup and Measurement:** Define and measure your Key Performance Indicators (KPIs) effortlessly. Sweet simplifies the process, ensuring you're always aligned with your business objectives.
- **Seamless Insights Sharing:** Collaboration is a breeze with Sweet. Share your insights easily with your team, fostering a data-driven culture that fuels innovation.
- **Multi-source Data Integration:** Sweet isn't limited to one data source. Integrate data from multiple sources to get a holistic view of your performance landscape, allowing for more informed decisions.

Sweet functionality

Online forms or digital forms

The power of having forms digital are many, availability is one – you can access it, complete and send it whenever you want. Also, if you need to tweak it that's easily done and can be up and running directly. That we save mother nature's resources is another plus.



Form designer

The form designer is the one creating the form, deciding what questions to ask, how they look, if any logic should be applied and styles the actual form and PDF, it's also possible to use html or CSS. But, no need to be an actual designer to create forms, everyone can do it!

Digital signing

The power of having forms digital are many, availability is one – you can access it, complete and send it whenever you want. Also, if you need to tweak it that's easily done and can be up and running directly. That we save mother nature's resources is another plus.



Authentication and permission

Authentication can be required in many steps of the process, to open and view the form, to fill in the form, to create the form or to view the responses. Would you like two-factor-authentication that's available as well as mobile bank ID.

Validation and rules

Create validations of input format, length or type to make sure you get the right answers in the first place. Top it with visibility rules or to further customize your needs, and to make it as neat as possible for the respondents.

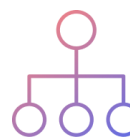


Integrations & API

Sweet can connect with third-party tools and services, including CRMs, analytics platforms, and other applications. Of course, we have an API that makes it all easier.

Automation and rules engine

Sweet Automation is the tool where you can create simple or very advance business rules and processes – fully automated. By using automation to manage your customer journeys, or the process around it, you will save time and increase your competitive advantage.



Analytics and reporting

Gain valuable insights into the effectiveness of your campaigns with detailed analytics and reporting. Track metrics like open rates, click-through rates, conversion rates, and revenue attribution to optimize your marketing strategies.

Integrations

Authentication & E-signing

scribe.

Scrive is one of our main partners, providing authentication and e-signing services for our Sweet Forms solution, use the integration to ensure integrity and security.

Information provider

roaring

Roaring is offering company and person information to assist in populating and validating data in conjunction with our Digital Forms or CRM, ensuring accuracy and seamless data collection.

Digital mailbox



Kivra provides a secure digital mailbox as a replacement for your physical mailbox. With our integration, we can assist you in sending secure mails, agreements or documents directly to Kivra.



As one of our trusted partners, Signicat offers complementary solutions for authentication and e-signing for Sweet Forms. This integration ensures integrity and security of your data.

Document storage

Synkzone

Safe storage and authentication solutions for Sweet Forms and CRM. Keep your files and documents safe in an encrypted storage zone.

API

Don't you find the integration you're looking for? Integrate it using our API. You can read the documentation [here](#).

Security and Compliance

Authentication

We offer a diverse range of authentication options tailored to meet your specific needs for securing your data. You can choose to login using username and password, adding two-factor authentication or using an authentication provider. See integrations for specific connections.

User access controls

We provide various user levels, ranging from basic users to administrators, each with different access rights and privileges. Your assigned user level will determine the extent of access you have within the system and if you can create forms, read responses and files or not.

GDPR

Our solutions are fully compliant with the current regulations outlined in the General Data Protection Regulation (GDPR). We prioritize the security and privacy of your data, and our platform includes built-in features to support anonymization or deletion of data as well as the ability to tag sensitive information. With our GDPR-compliant solutions, you can trust that your data is handled in accordance with high privacy standards.

Information security

At Sweet, we prioritize the security of your data and we are proud to be ISO 27001 "Information Security Management" certified. With our well-established processes, we ensure that your data is always handled and managed securely. Data and information security are of utmost importance to us, and we go above and beyond to safeguard your valuable information.



Infrastructure & Storage

Set up

Our set-up model is easy, it's a digital platform with a cloud first storage strategy (but we can help you set it up locally when required.)

- Azure Cloud, either shared or separate cloud
- On-premise

The form templates

The form templates are stored within the platform and can be accessed by form administrators (Form Designers) in the form solution.

Form answer

The answers are stored within the solution and can by default be accessed by users of the system, and by the link to the form answer. It's possible to change the settings for the access control, from limited to fully accessible. The form answers can for example be limited to only being accessible for Form Designers, or by using the link to the answer during a certain period.

Files uploaded to the form

Files that are attached/uploaded to forms can be accessed by all users via the Selection menu.

Digitally signed documents

When using an external e-signing provider, they store the final and signed version of the form in their e-signing platform. We could also provide the signed PDF from the signing provider in Sweet.

External storage

If your data is very sensitive, we suggest you store your data in your own database, or in a cloud storage provider with your requested level of security. We collaborate closely with our partner Synkzone who are experts in storing sensitive files, documents or forms with strict user access controls divided into encrypted zones.

Are you ready to get started with Sweet?

Contact us



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