WEOKIE Federal Credit Union Makes PDF Forms Work on All Devices

Case Study 8/15/2022

- Sales Contact Form Link
- Jim.Healy@FormRouter.com
- 919-454-1447

CONTENTS

1. PROBLEM OVERVIEW 3
1.1. Problem 1: Securely Capture PDF Forms into a SQL Server 3
1.2. Problem 2: Make PDF Forms Work on all Devices 3
2. SOLUTION 4
2.1. FormRouter Account 4
2.2. PDF to HTML5 Rendering 4
3. RAPID BUILD 5
4. WEOKIE FORM EXAMPLES 6

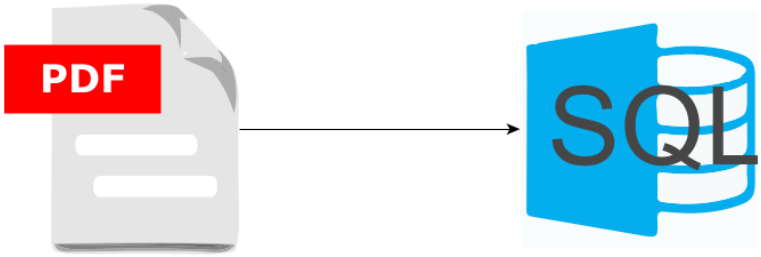
1. PROBLEM OVERVIEW

WEOKIE Federal Credit Union is one of the largest financial institutions in Oklahoma with over $1.2 billion in assets. They offer financial services to cover home/commercial bank accounts, loans, credit cards, investment, and insurance products.

1.1. Problem 1: Securely Capture PDF Forms into a SQL Server

WEOKIE, like many other credit unions, require internal communication via forms. To reduce paper, to eliminate the rekeying of data, to increase data accuracy, and to have an open standard archive format, fillable PDF forms were selected.

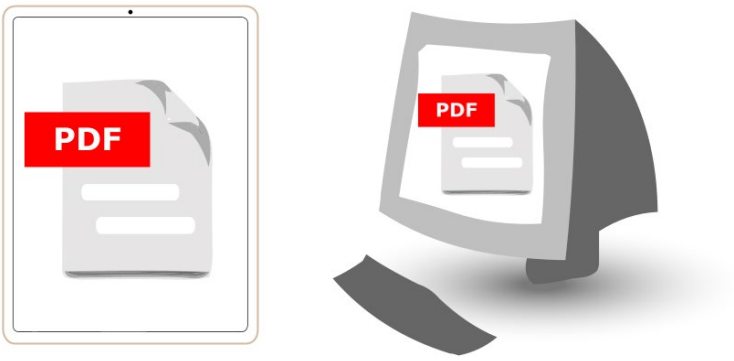
Submitted forms were required to route directly into an on-premises SQL Server.



1.2. Problem 2: Make PDF Forms Work on all Devices

Unfortunately, PDF forms require all users to have a copy of Adobe® Acrobat® or Reader® installed on a PC. Forms must be downloaded to the desktop, opened, fill out, then saved.

The requirement to use Adobe Software and the lack of ability to simply fill and submit a PDF form from the Web Browser created support issues and inefficiencies.

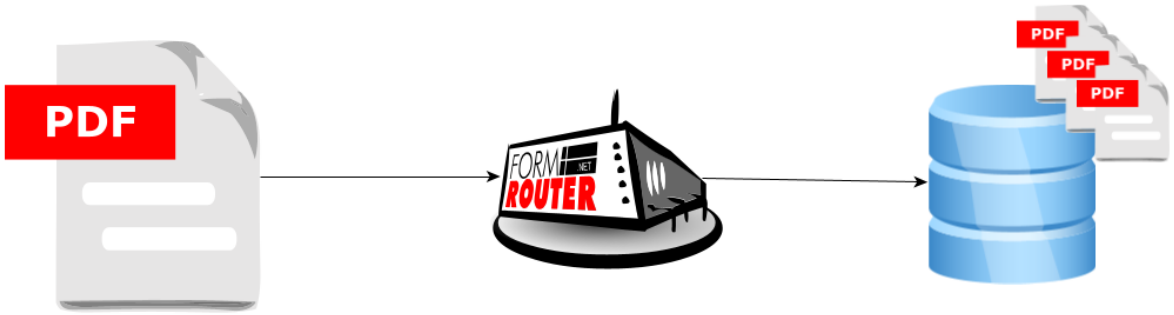


2. SOLUTION

A single FormRouter Account with the ability to render PDF forms as HTML5 to work in all Web Browsers on all major devices.

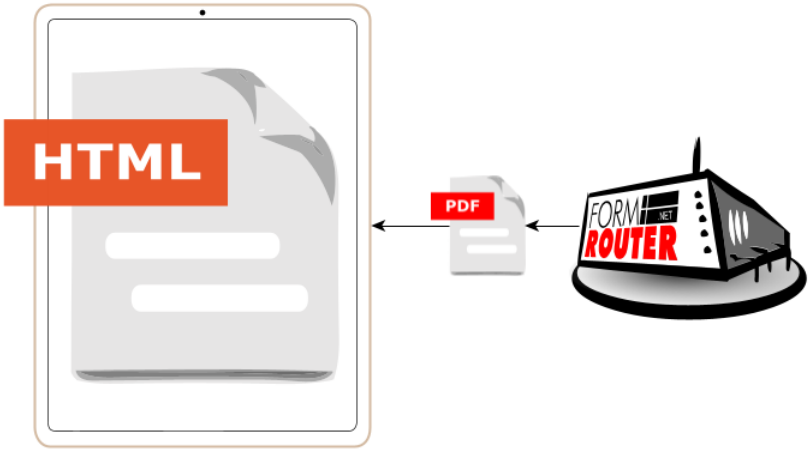
2.1. FormRouter Account

A FormRouter Account provides a place to securely submit an unlimited number of different forms into a single database. FormRouter supports: PDF, HTML and Excel form formats. Databases supported: SQL Server, SharePoint, Access, Excel, SalesForce.com and many more.



2.2. PDF to HTML5 Rendering

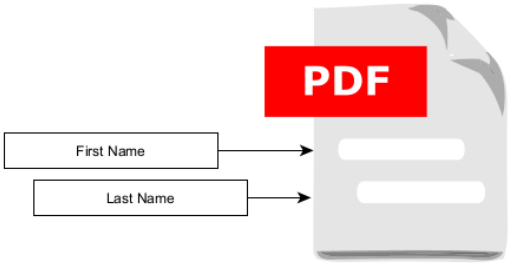
Built into FormRouter is the ability to render PDF forms as HTML5 in a Web Browser. This allows PDF forms to be filled out and submitted from all major devices (including iPads & Tablets). When data is passed through the router it may be combined with the original PDF form to pass a filled PDF to a database.



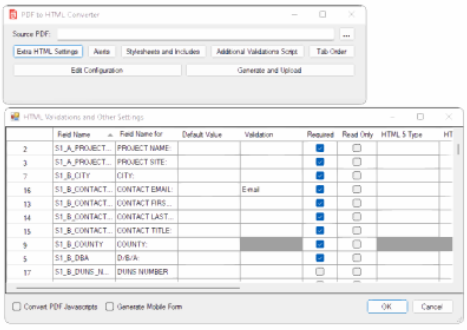
3. RAPID BUILD

The setup is simple and requires no programming (unless advance interactivity is required in forms)

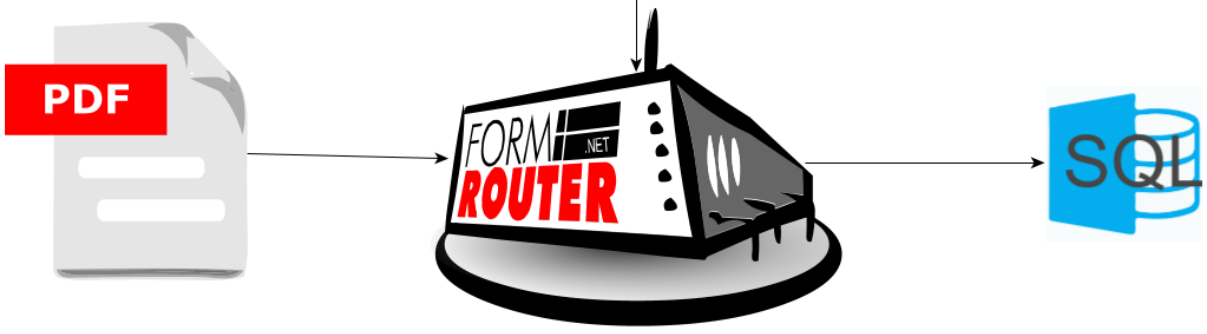
Step 1: Add Fillable Fields to PDF Forms in Adobe Acrobat
Step 2: Open PDF Form in FormRouter's PDF2HTML Conversion Tool (to configure required fields etc.)
Step 3: Upload Form to Router & Test Form



STEP 1



STEP 2



STEP 3

4. WEOKIE FORM EXAMPLES

This is just a short list of a growing number of forms WEOKIE Federal Credit Union uses FormRouter for:

- ABUSIVE MEMBER REPORT FORM
- ACH STOP PAYMENT REQUEST ORDER FORM
- CREDIT BUREAU REPORT CORRECTION FORM
- CHECK/DEBIT CARD DISPUTE FORM
- COACHING SALES 101 REPRESENTATIVE FORM
- COMPLAINT REPORT FORM
- CONFERENCE SUMMARY REPORT
- COUNTERFEIT NOTE RECEIVED FROM
- CREDIT CARD MERCHANT DISPUTE FORM
- (CTR) INFORMATION FOR CURRENCY TRANSACTION REPORT FORM
- (CUNA) MEMBER REFERRAL FROM CREDIT UNION STAFF FORM
- DIRECT DISPUTE FORM
- DONOR CONTRIBUTION (FOUNDATION) FORM
- EMPLOYEE EXIT CHECKLIST AND TERMINATION REPORT FORM
- REFERRAL FORMS
- GENERAL LEDGER TRANSACTION REQUEST FORM
- GPS ORDER FORM
- LOAN CHECKLIST FORM
- MONETARY INSTRUMENT LOG (MIL) FORM
- NAME TAG REQUEST FORM
- OUTGOING COLLECTION FORM
- REMOTE ACCESS REQUEST FORM
- REQUEST FOR INTERNAL TRANSFER
- STOP PAYMENT CANCELLATION FORM
- STOP PAYMENT ORDER FORM
- SUSPICIOUS ACTIVITY REPORT (SAR) FORM
- SUSPICIOUS BEHAVIOR FORM
- UCC FINANCING STATEMENT (UCC-1) FORM
- WIRE TRANSFER FORM