# Can I Do This with Fluix?

**Quick Answers on Anything Fluix** 



## Forms, Tasks & Documents

Can I design my own forms from scratch?

Can I use my existing fillable PDFs as forms?

Can my team use Fluix offline via mobile app?

Can my team get automatic reminders to complete their recurring forms & tasks?

YES

You

Can

Can my team add personal notes along with submitted forms?

Can I easily capture and send photos?

Can | create a custom approval process for how forms are handled?

Can I send forms or custom-designed reports to my clients or others when a process is completed?

Can I design a fully automated process, with multiple forms and approvals required for different stages in the process?



## Forms, Tasks & Documents

Can 1 set up forms and tasks that only certain members of the team can see?

Can | archive a flattened PDF of each completed form to Sharepoint/ Dropbox/Google Drive or other cloud software?

Can i send forms and tasks to my team to complete?

Can | use Fluix with external partners like customers and contractors with just a link, a text message, or a QR code?

YES

You

Can

Can | attach files, documents, and notes to forms and tasks?

- Can | set up an unlimited number of forms for different processes with Fluix?
- Can | apply conditional logic to automatically route forms for approval to different people based on some criteria?



# Data, Reports & Integrations

YES You Can

Can Lsend data from completed forms to other software my team uses?

Can I use data from another source (like a CRM) to pre-fill a form?

- Can | be sure Fluix is compliant with data protection security standards in order for us to connect our storage to it?
- Can I see everything that's happening in my account on a single screen or dashboard?

Can | pre-fill a form with data from another form that was submitted?

Can | use Fluix seamlessly with Zapier, Make, Workato, or other no-code and automation solutions?

Can I connect Power BI or Tableau so I can graph and chart our data?



### **Account Administration**

Can you-help me set up my processes in Fluix?

Can I connect Fluix to other systems like our CRM, Slack, etc.?

Can I use Fluix on iOS and Android devices?

Can I have a customer support manager assigned to me?

Can | separate each of my projects into different Fluix accounts?

Can- add/remove users at any time?

Can | trust my data's security in Fluix?

Can | get rid of Docusign or Hellosign completely to use Fluix?

Can I maintain HIPAA compliance using Fluix?

Can | use our organization's Single Sign-on?



YES You Can