



# **Quick Start Guide**

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## Purpose

**ExpressAbility Document Filler** automatically builds completed forms by merging data from a provided data source into fillable fields. This is made possible using a mapping methodology, whereby detected source and destination fields are chosen from a dropdown and saved by a user.

This project may serve as a standalone application, but is intended to be modified to meet the needs of your organization and specific use case.

## Components

#### **Document Library**

The Document Library consists of uploaded PDFs consisting of fillable form fields. Any PDF uploaded to your Document Filler library can be filled with data from a data source. Note that fillable PDFs sometimes have field names (field identifiers) that are named in a way that is not particularly user-friendly.

#### **Mapping Set**

A Mapping Set is the user-defined mapping between your data source fields (the source) and the document's form fields (the destination). A single PDF in the library can have multiple Mapping Sets, supporting differing source file data arrangements (column names and column ordering).

#### My Filled Forms / Build Events

My Filled Forms is where all of your (user-specific) document build processes are located. Within a specific build process detail page, completed/filled forms can be viewed or downloaded.

## How to Use - Step by Step Guide

#### Summary:

- 1. Upload fillable PDF file to the Document Library
- 2. Create a Mapping Set: Upload a reference data source file and map fields
- 3. Launch a form population process and upload data source file
- 4. Watch progress and view results from My Filled Forms tab

### 1. Upload fillable PDF File to the Document Library

#### Document Filler (Portal Folder) > Form Library Tab > + Add Form button



Filler			
Form Library My Filled Forms			
			+ Add Form
			く つ ※ 回:
DOC ID 🔱 FORM NAME	MODIFIED DATE	CREATED BY	

Upload a PDF that has fillable form fields.

locument Name		
lescription.		
	1	
	Drag file here	
	OF	
	CHOOSE FILE	
	PDF form to the Document Library. Then, create a Mapping S	

## 2. Create a Mapping Set: Upload a Reference Data Source File and Map Fields

Document Filler (Portal Folder) > Form Library Tab > (Right Click Form Library Item) > Create Mapping

#### -OR- After adding a new Form Library item, click the button "Create Mapping" button.

Upload a Template Reference file – this is an Excel file that provides the same structure (exact same column names) as the data source you intend to use to populate the form. This could be the data source Excel file itself.

	$\Box$ ×
Create New Data File Mapping	
Upload Template Reference File	
Excel xlisx file that has the same column order and column names as the data source you wish to use to popu forms. NOTE: This can be the data source file.	ate
Drag file here	
or CHOOSE FILE	
Skip - I don't have a reference template	đ

Name the Mapping Set, and then select a Source Field for each PDF field that you wish to populate with data (Form fields are on the LEFT, Data source fields are on the RIGHT). To test selections prior



to saving, you can click "Generate First Row Preview" and the form viewer will preview selected mappings for your review.

**NOTE:** Some PDF forms do not have clearly named fields. Trial and error may be needed to fill the correct fields with the correct data. Use of the "Generate First Row Preview" functionality makes this refinement possible.

Mapping Set Name				Generate First Row Preview
Description		Form 426 - Request for 1 / 2	- 91% +   🕄	৩ <b>± ল</b> :
Doc Field	Source Field	Form REVENUE 426 Request for Refund of Taxes or Fees		Reset Form Print Form
print				Telsphone Number
print Name Print		E-mail Address	City I am \$	State Zip Code requesting a refund in the amount of (optional)
Telephone Number		Preferred Method of Contact: Phone E-mail Under penalties of perjury, I declare that the information Signature	n provided on this form and any attache	ed supplement is true, complete, and correct.
Mailing Address		Approved refunds are payable to the person "legally ob Select the box that applies to the type of refund you ar I understand that I must submit the items listed in the	re requesting.	
City	•	"Unit" as referenced in this form refers to motor vehicle <b>180-Day Credit:</b> Purchased, or contracted to pur a. Missouri Tile Receipt - a legble cory for the	e, trailer, boat or outboard motor.	within 180 days before or after the purchase.
State	•	<ul> <li>b. Property completed and signed Bill of Sale (F</li> <li>c. Proof of ownership from your previous state (i.e., original registration receipt or certified til</li> </ul>	form 1957) or Notice of Sale (Form 5 of residence if you sold the vehicle on	(049) for the unit that was sold; and
Zip Code	•	Local Tax: Overcharged on my local tax rate.     a. Missouri Title Receipt - a tepble copy of a traw Waiver, a statement for     the city (if you live in the city limits) and count	om the county or city collector, or a pe	es and fees paid; and ersonal property tax receipt verifying
Email Address	•	Bascinded Sate: Returned a unit to a dealer wi a. Missouri Title Receipt - a tepible copy for the b. Non-interrest statement from the ionholder (if y c. Statement from the seller of dealer indicating	unit that was purchased showing tax ou have a lienholder); and g the sale was rescinded. The stateme	es and fees paid; ent must include the date the unit
Amount of Refund		was returned, the amount of the purchase pr	ice returned to the buyer, and the rea	ison the unit was returned.
Switch Source				Save

#### 3. Launch a Form Population Process and Upload Data Source File

Document Filler (Portal Folder) > Form Library Tab > (Right Click Form Library Item) > Populate Form with Data

Create Mapping Delete Document Edit Document Populate Form with Data View Document

Upoad the Excel file data source to be used to populate the selected PDF.

**NOTE:** If checkboxes (Boolean fields) exist in your PDF form and you desire to populate these fields, it is required that you represent this data in a specially formatted way in your data source (Excel file). These fields should be populated with text/string values as follows: [TRUE] or [FALSE] –include the capital case and the square brackets. Errors will result from trying to populate checkbox fields with data in other formats.

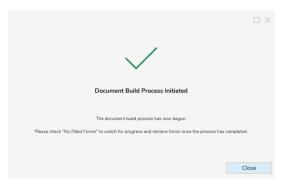


Upload Excel File with Data to Fill PDF
Select Excel File (XLSX)
Drag file here or CHOOSE FILE
TIPS:
-Only the first Worksheet is used in the uploaded Excel file.
-Use (TRUE) or (FALSE) values in spreadsheet for checkboxes in PDF forms. If this is not used, an error will result for that row during the form filling process.
Cancel Next

Select the previously created/configured Mapping Set you wish to use for this Document Build Process and click "Use Selected".

Select	Mapping Set					
						٩ Ð :
	MAPPING ID	NAME	CREATED BY		CREATED ON D	ATE
1	DOCM000021	My MO 426	admin@decisions.com		6/26/2024 12:19	PM
				Car	cel	Use Selected

Verification that the Document Build Process has been initiated should display.



4. Watch Progress and View Results From My Filled Forms Tab Document Filler (Portal Folder) > My Filled Forms Tab > (Click on the Build Job)



Check the status of your build process.

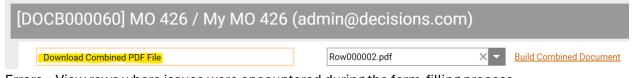
✓	Completed
<ul> <li>Image: A start of the start of</li></ul>	Completed with Errors
0	Canceled

Form Library	Filled Forms	_				Q Q X I
BUILD ID	$\downarrow$	FORM	MAPPING	STATUS	START	END
✓ DOCB000060		MO 426	My MO 426	Completed	7/18/2024 3:26 PM	7/18/2024 3:26 PM

#### Build Process Details Interface Functionality

- 1. Each generated file can be downloaded individually by Row number.
- 2. Viewer allows display of the generated PDF. Select the document in the drop down above the viewer area.
- "Build Combined Document" link will initiate a back-end process to generate a single PDF document containing all generated documents combined into one. This operation can consume significant server resources (memory, CPU) for large volumes of PDFs and PDF with many pages.

Once the combining process has completed, a new link will appear, "Download Combined PDF File."



4. Errors—View rows where issues were encountered during the form-filling process.

#### **Build Process Details Interface:**

505000000 WIO 420	/ My MO 426 (admin(	decisions.com)	s 100 % Com
	Rowl	00002.pdf × Build Combined Document	
Generated Files	^   _	Form 425 - Request for Refund of Ta 1 / 2 - 100% + 3	± e :
Row000002.pdf	Download	Form 426 - Request for Refund of Ta 1 / 2   - 100% + 1 🕄 👌	± 0 :
Row000003.pdf	Download		
Row000004.pdf	Download	Reset Form	Print Form
Row000005.pdf	Download		
Row000006.pdf	Download	426 Request for Refund of Taxes or Fees Paid on Vehicle or Marine	
Row000007.pdf	Download	}	
Row000008.pdf	Download	Name (Print) John Smith (8, 1, 5) 5	5 5.1 2 3 4
Row000009.pdf	Download	Mailing Address City State	Zp Code
Row000010.pdf	Download	123 Maple Ave Kansas City MD E-mail Address I am requesting a return i	64101
Row000011.pdf	Download	True \$ 2500	n the amount of (optional)
Row000012.pdf	Download	Preferred Method of Contact: Phone E-mail	
Row000013.pdf	Download	Under penalties of perjury, I declare that the information provided on this form and any attached supplement is true	e, complete, and correct.
Row000014.pdf	Download	Signature Date (MMD	0/11111
Row000015.pdf	Download	· · · · · · · · · · · · · · · · · · ·	
Row000016.pdf	Download	Approved refunds are payable to the person "legally obligated to remit the tax." In the motor vehicle context,	that is the purchaser.
Row000017.pdf	Download	Select the box that applies to the type of refund you are requesting.	
Row000017.pdf Row000018.pdf	Download	I understand that I must submit the items listed in the applicable section to avoid my refund claim being denied. "Unif" as referenced in this form refers to motor vehicle, trailer, boat or outboard motor.	
Row000019.pdf	Download	180-Day Credit: Purchased, or contracted to purchase, a unit and sold a different unit within 180 days before	of after the purchase
Row000019.pdf	Download	Intervent Partnase, or contracted to partnase, auntant social american write any better a. Missouri Title Receipt - a legible copy for the unit that was purchased showing taxes and fees paid; b. Property completed and signed Bit of Sale (Form 1957) or Notice of Sale (Form 5049) for the unit that	
Row000020.pdf		c. Properly completed and signed bit of sale ( <u>corn spice</u> ) of holde of sale ( <u>corn spice</u> ) of the trite that is a proof of ownership from your previous state of residence if you sold the vehicle on an out-of-state title (i.e., original registration receipt or certified the record from your previous state).	was sold; and
How000021.pdf	Download	p.m., original registration receipt or cardinal title record from your previous state).	
Errors	Doumland	Local Tax: Overcharged on my local tax rate. a. Missouri Tale Receipt - a leable copy for the unit that was purchased showing taxes and fees paid; and	



## Who is ExpressAbility?

ExpressAbility is a US-based partner that specializes in helping clients maximize the value of the Decisions platform for their business. Succeeding with no-code/low-code solutions requires strategic thinking and execution.

By partnering with ExpressAbility, you gain instant access to a team of experts who will ensure you achieve optimal results with the Decisions platform. Get ready to unlock new levels of success with our guidance!



Years in Business	21
Years as a Decisions Partner	11
Geography	Based in the Midwest (St. Louis)
	Employees throughout the US
Practice Lead	Jason Drinen (jdrinen@expressability.com)
Website	https://www.expressability.com

#### Services

**Staff Augmentation**—Instantly expand your team with expert developers and unlock the potential of Decisions by building hard-hitting solutions quickly.

**Coaching and Mentorship**—Ongoing assistance with architecture, best practices, and team enablement to make your Decisions implementation a success.

Schedule a consultation today!



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