

Build, Maintain and Share Your Business Data in One Place

Populate your online database while enforcing data health and structure in a secure manner with the Forms app built on the Pitchly Platform.

Custom Forms Ensure Up-to-Date Data Create custom forms based on who you need information from. Whether it's clients, colleagues, or knowledge experts in external departments, you can create forms designed for your specific needs. First, create one or more databases in Pitchly from scratch or using existing data by connecting your SQL server or importing an Excel file(s) (one Excel worksheet = a database). The data will populate into the Pitchly Platform and is available to search, filter, and cross-reference. Use the data to make strategic decisions and create data-infused PowerPoint slides for inclusion in pitches, pitchbooks, marketing flyers, brochures, team reports, or any other business task requiring recursive data.

How it Works

Create Forms

- Select which fields need populated and hide the rest.
- Adjust the order of form fields by relevance and necessity.
- Field types enforce database structure (dropdown, number, currency, date).
- Incorporate your firms branding, color, and fonts.
- Write instructions regarding why they are completing the form.

Share With Your People

- Email the form straight away through the Forms app.
- Create a schedule to send forms automatically on a weekly or monthly basis.
- Share the form anywhere you'd like by using a secure unique hyperlink.
- To create urgency, set an expiration date for completing the form.

Verify Your Permissions

- Set up automatic reminders to compile submissions as frequently as required.
- Allow direct submissions to quickly build your database.
- Regulate who can approve and edit form submissions, to maintain accuracy.
- Set up user notifications for when submissions are ready for approval.
- Easily view submissions arranged by pending, rejected or approved.

New Form

Add new records to your database quicker than e

NEW RECORD*

DATE

RECORD #*

ATTACHMENT*

Click

REFERENCED DATABASE*

Pro Tip: Select only the fields pertinent for the recipient to enter, ensuring a quicker response time.

Time-Saving Benefits

No more formatting, structuring data

The Forms app enforces data structure and format ensuring form submissions are consistent with the database. No longer will you have to reformat five different values sent to you for the same field by five different contributors. You'll have consistent currency and date formats, too. With drop-down and checkbox options, you won't have to manually change submissions to populate field entries correctly.

Security Benefits Without a Login

Anyone can contribute. While the Pitchly Database allows for custom user settings and permissions, the Forms app doesn't require a login for submission. Whether the person completing the form is from inside or outside of your organization, the individual can complete the form with a secure public URL link. The approval settings allow you to determine which submissions require review before recording to the database.

Digital Asset Management Benefits

The Forms app allows users to attach and upload files (images, documents, videos, etc.) to a record in the database, which creates a process to store digital assets and files with corresponding database records. For example:

- Clients can upload logos and headshots for testimonials.
- Onboarding employee forms can include their driver's license photo and other documents required to set them up for payroll and benefits.
- Contracts can be saved for vendors, partners and clients.

Build a Library of Forms for What's Next

Build as many forms as your business requires. The Forms app helps maintain your data's health, making it useable for what's next. Whether marketing needs client testimonials, sales needs deal information, or operations needs project close-out data, the Forms app ensures the data is there when you need it.

No more copy and paste

Do you gather information by emailing questions, sending fillable PDFs, Word docs, or sharing spreadsheets? Then, do you spend considerable time copying and pasting data into your database fields? The Forms app gathers information with a simple, intuitive design, anyone can easily use without any training.



Public Link

Share via Email

Send On

Expire On

Scheduled Reminders after days
Each remind date is based on when the invite or previous reminder was sent.

Limit to one response

Active Invites

 info@pitchly.com - One Response Limit
date submitted for response

Share a public URL link via email to instruct users to complete the form. Schedule the email and set an expiration date, if necessary.

See Pitchly in Action

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[SCHEDULE DEMO](#)