

# STREAMLINING ONLINE DOCUMENT COMPLETION USING AN API

Using PDFfiller's Intuitive API, Compliance Management's clients can complete and submit documents directly from their website.

# Who

Compliance Management, LLC offers online safety training and tracking as well as serving as a hiring platform.

“Let’s say a manufacturer has to train their employees on lockout/tagout, machine guarding, blood-borne pathogens, and so forth, we do all of that online for them,” said Colton McKinney, president of Compliance Management, LLC. The company also helps clients with incident reporting and online OSHA 300 log completion. Moreover, “another component of our software is actually a hiring platform, which includes all of the steps to hire a simple employee to do a manual labor-type job: the application, the I9, the W4, any custom documents that they would need to fill out and sign for employment in their state or by their employer,” McKinney said.



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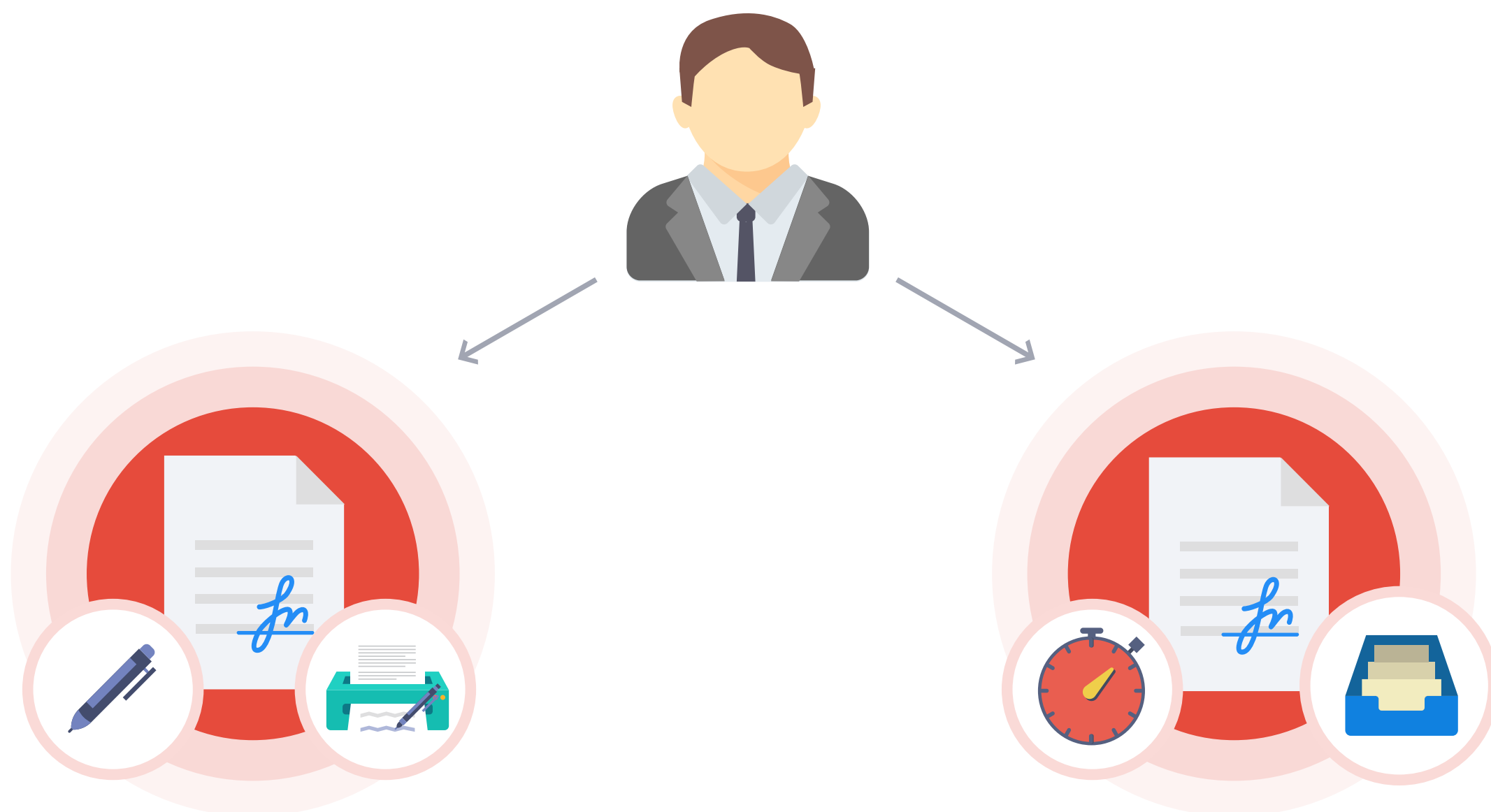
[www.osha.gov](http://www.osha.gov)

Compliance Management integrates the expertise of three strategic partners with years of experience in operating industrial businesses, interactive online services and safety training. Combining these disparate areas of expertise makes Compliance Management a unique and powerful service to outsource the training, tracking and hiring processes.

Colton McKinney, Compliance Management’s president, is the third in a line of family members who have started, acquired, developed or sold companies in industries including sawmilling, pallet manufacturing, fastener distribution and more. With generations of experience, the McKinney family runs the day-to-day operations of Compliance Management, bringing a body of knowledge of these specific industries to the company’s work.

# The Problem

Much of Compliance Management's work demands the completion of documents. There are a number of documents that are used throughout the tracking and hiring processes and making these quick and easy to complete was an important part of Compliance Management's benefit to clients. Digital documents can be completed faster and are easier to store if they are managed correctly – Compliance Management was looking for a solution to this problem. And moreover, they were searching for a more powerful replacement for traditional web forms.



“We didn’t have anything in-house that could do it,” said McKinney, referring to the digital completion and transmission of documents. And “we have to have highly customizable documents because any client could say, ‘put this document online,’ so we have to be able to upload that, put fillable fields in that document, and then use the API to auto-fill those fields. And there are very few [applications] that can do that.”

PDFfiller proved to be the powerful solution they were looking for.

# The Solution

PDFfiller has been a fundamental component of Compliance Management's client services since the company's conception and is, said McKinney, an integral part of the company's digital document workflow.

Powered by the PDFfiller API, Compliance Management's clients can now complete and submit fillable forms directly through the company's website. The PDFfiller REST API allowed Compliance Management to build an application that interacts with PDFfiller so clients can complete documents and add electronic signatures without ever leaving Compliance Management's website. The API has also made it easier for the company to collect and collate submitted information.

The PDFfiller API has the ability to integrate powerful document management features directly into business applications, meaning it is now possible for Compliance Management to collect completed forms through PDFfiller from various parties from within their own online system. PDFfiller's API also integrates easily with market-leading ISVs including CRM, CPQ, Practice Management and other SaaS application providers. Cloud-native, white label APIs enable the seamless integration of PDFfiller's powerful document management features directly into any website or software package.

Compliance Management is using PDFfiller on a daily basis. "We have probably 500 employees on the system now and we have signed another thousand and we're also doing demos [and intending to add new users in the near future]," said McKinney.

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PDFfiller's API integrates with Compliance Management's own API to provide quick and seamless document completion and transmission from clients to Compliance Management's servers where they are stored.

"[When] a company comes to us and says 'Hey, we want to set up your system'. We'll say, 'great, we'll set your application up and then when you hire your employee, the documents they need to fill out and sign -- the W9, the I9 and any others you want them to sign -- we'll put online," said McKinney. "And then we autofill [documents using] PDFfiller from [within] our application and [then users] can fill out the rest of the information and sign it, and then that saves to PDFfiller."

For Compliance Management, connecting their API with PDFfiller's and providing a seamless digital document workflow for clients is simple and makes the document completion process faster and easier than ever before:

First, Compliance Management makes digital documents fillable using PDFfiller's proprietary drag and drop wizard to add smart fields to digital forms. "We put [custom smart] boxes [in the webform] and in some of the blanks, we actually fill in that information as we're generating the PDF from our system to the API," McKinney said. This means that all of the submitted information is automatically added to the document.

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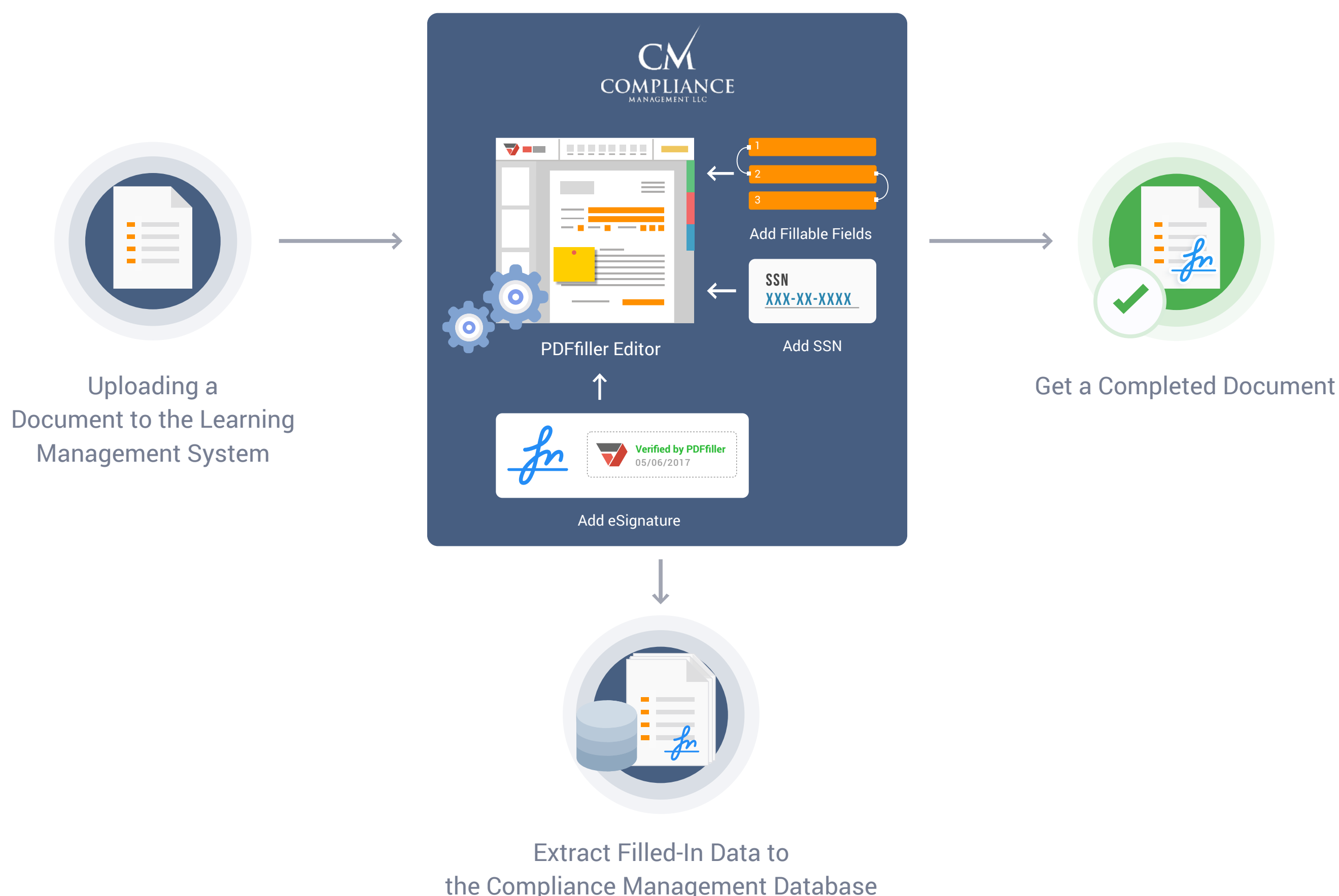
– Colton McKinney, President

After the forms have been uploaded, they are accessible to clients through Compliance Management's website. "We provide a link from our system to the PDF. [Clients] get links to PDFfiller to fill out the document and then once it generates the final PDF, it's on our system."

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Once completed, the “online webform that we use for our application... goes to our Cold Fusion platform [an LMS]. That information then goes from our API to PDFfiller’s API, which writes it to the fillable fields that we’ve put on the PDFfiller document,” said McKinney, describing the document completion process.



PDFfiller “has been working excellently,” McKinney said, providing “more customization” than the alternatives and allowing users to quickly and easily complete documents which are sent instantly from Compliance Management’s website through PDFfiller and into their servers.

Moreover, because of PDFfiller's emphasis on security, government documents containing personal data that are received and stored by Compliance Management are always secure. "It helped that PDFfiller had all the security requirements that we needed because there are government documents going back and forth on there and they do have some personal information," McKinney said.

Advanced security features include PIN protected folders, two-factor authentication, and redundant backups. PDFfiller is HIPAA and SOC II Type 2 compliant so Compliance Management can be sure that their documents are secure, while other companies can be sure that they meet safe-practice guidelines.

With a "very" helpful customer service team, McKinney said, Compliance Management was able to get a bespoke digital document solution integrated quickly enough that they could build their company around PDFfiller. Since then, they have seen the company grow as PDFfiller helped them facilitate the submission and transmission of huge numbers of documents.

## Conclusion

PDFfiller is the easiest way for businesses to integrate digital documents into their client-facing online services. PDFfiller is an easy to use digital document solution that makes it simple to have forms completed online through their integrated API. PDFfiller's intuitive document management platform allows users to add information and even signatures electronically, meaning that it can serve as a comprehensive solution to a business's digital document workflow.

"Yes, [I would] absolutely [recommend PDFfiller] for a company that would use it to generate documents fairly regularly and for a company that is just looking for a solution to fill out PDFs online," said McKinney.