

Engaging Business Partners in Compliance Procedures

Instead of receiving documentation from business partners via email for manual review and archiving, streamline and control the process using a SnapForm.

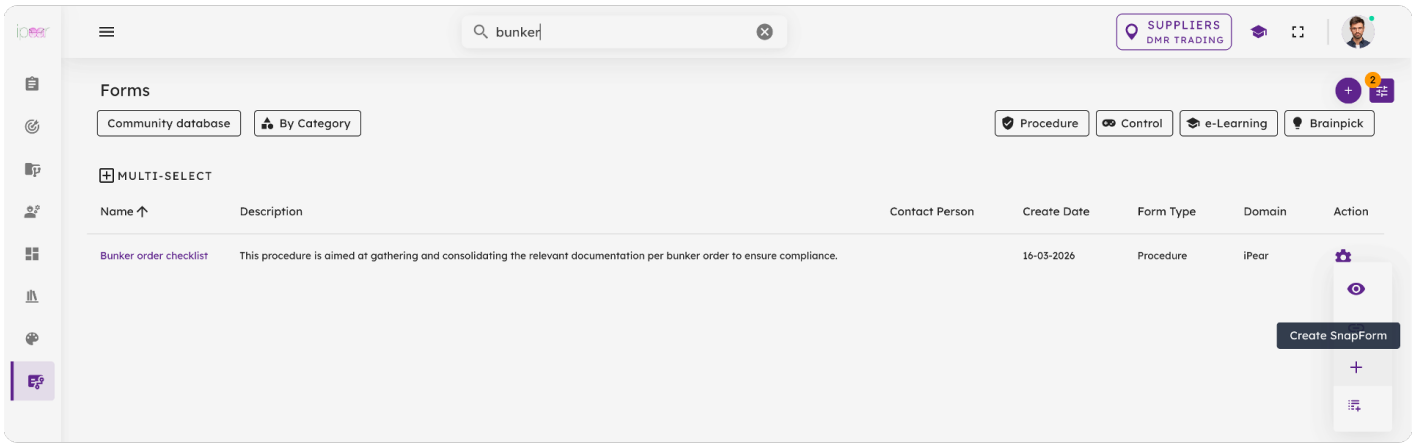
Start by defining which documents are required per order. Then include control questions that allow your business partner to confirm upfront the checks you would normally perform upon receipt of the documentation. For example:

The screenshot displays the SnapForm builder interface for a 'Bunker order checklist'. The interface is divided into three main panels:

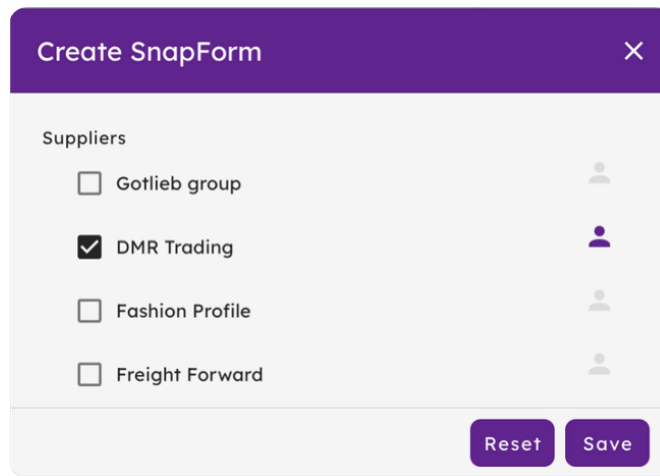
- Form Elements:** A sidebar on the left containing various form components: Radio Button, Checkbox, Text Field, Text Area, Dropdown, Date Field, and File Upload.
- Form Structure:** The central panel showing a hierarchical tree of the form. The root is 'Bunker order checklist', which contains:
 - 1. Order number (Text Field)
 - 2. Customs status of the Product (Radio Button)
 - 21. Other relevant documentation (File Upload)
 - 22. Notes (Text Area)
 - 23. Full quantity bunkered? (Radio Button)
 - Yes (Radio Button)
 - 24. Full quantity BGD accounted for by BDN(s)? (Radio Button)
 - Yes (Radio Button)
 - No (Radio Button)
 - No (Radio Button)

- Live Preview:** A panel on the right showing a preview of the form with 26 fields. It includes:
- Order number (Text Field)
- Q - Customs status of the Product (Radio Buttons for T1 (non-Union), T2 (Union), Both)
- Other relevant documentation (File Upload)
- Q - Notes (Text Area)
- Q - Full quantity bunkered? (Radio Button for Yes)

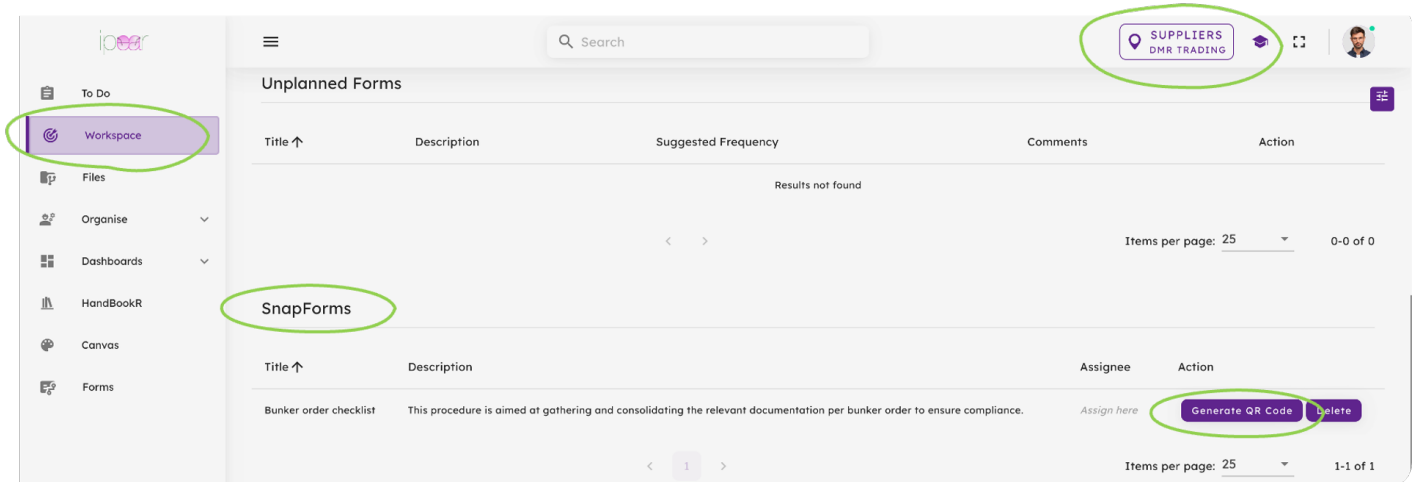
Once the setup is completed, publish it as a SnapForm.



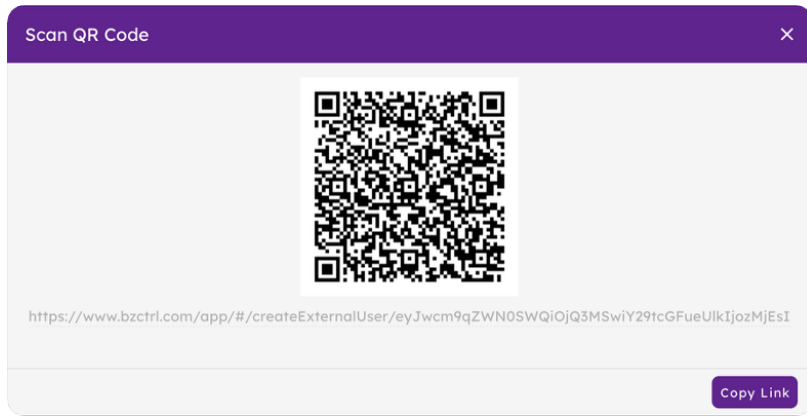
Link the SnapForm to the relevant Workspace, in this case the Workspace for **DMR Trading**.



The SnapForm is now available under the **DMR Trading** Workspace.

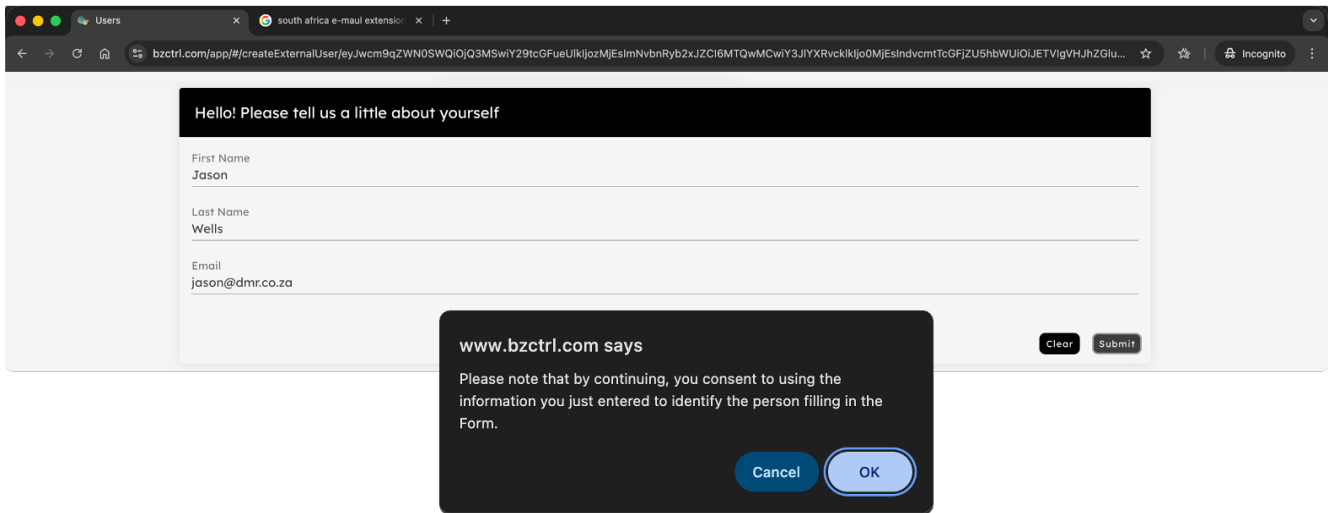


Here you can generate the QR code or URL for the SnapForm.



Share this URL or QR code with your business partner, in this case your contact at DMR Trading.

Each time the QR code or URL is used, a new Form instance is automatically created in the **DMR Trading** Workspace. DMR Trading will only have access to the submitted Forms, while your organization can manage and review them directly within the BzCtrl. environment.



Jason from DMR Trading will see the Form as an External User, without requiring access to the BzCtrl. environment itself.

DMR-01

bzctrl.com/ipear/#/todo/ipe-SAF-IPM-SUP-DMR-01?external=true&eu_code=s2c740d5-91af-4eb1-8475-23c25ce98c6d

pears

To do > Details

Bunker order checklist

This procedure is aimed at gathering and consolidating the relevant documentation per bunker order to ensure compliance.

Order number
SARS 4321

Q - Customs status of the Product

T1 (non-Union)

T2 (Union)

Both

Notification e-mail to Customs

Select or drag file(s) from your computer

• Customs notification.eml

Bunker Guidance Document (BGD)

Select or drag file(s) from your computer

• Scan BGD 5000.pdf

MRN Re-Export declaration
20SA12345678901234

| Type | Key | Status | Priority |
|------|--------|--------|----------|
| | DMR-01 | | None |

Assignee
 Jason Wells

Reporter
 James Bishop

Due Date
None

Reminder Date
None

Progress
None

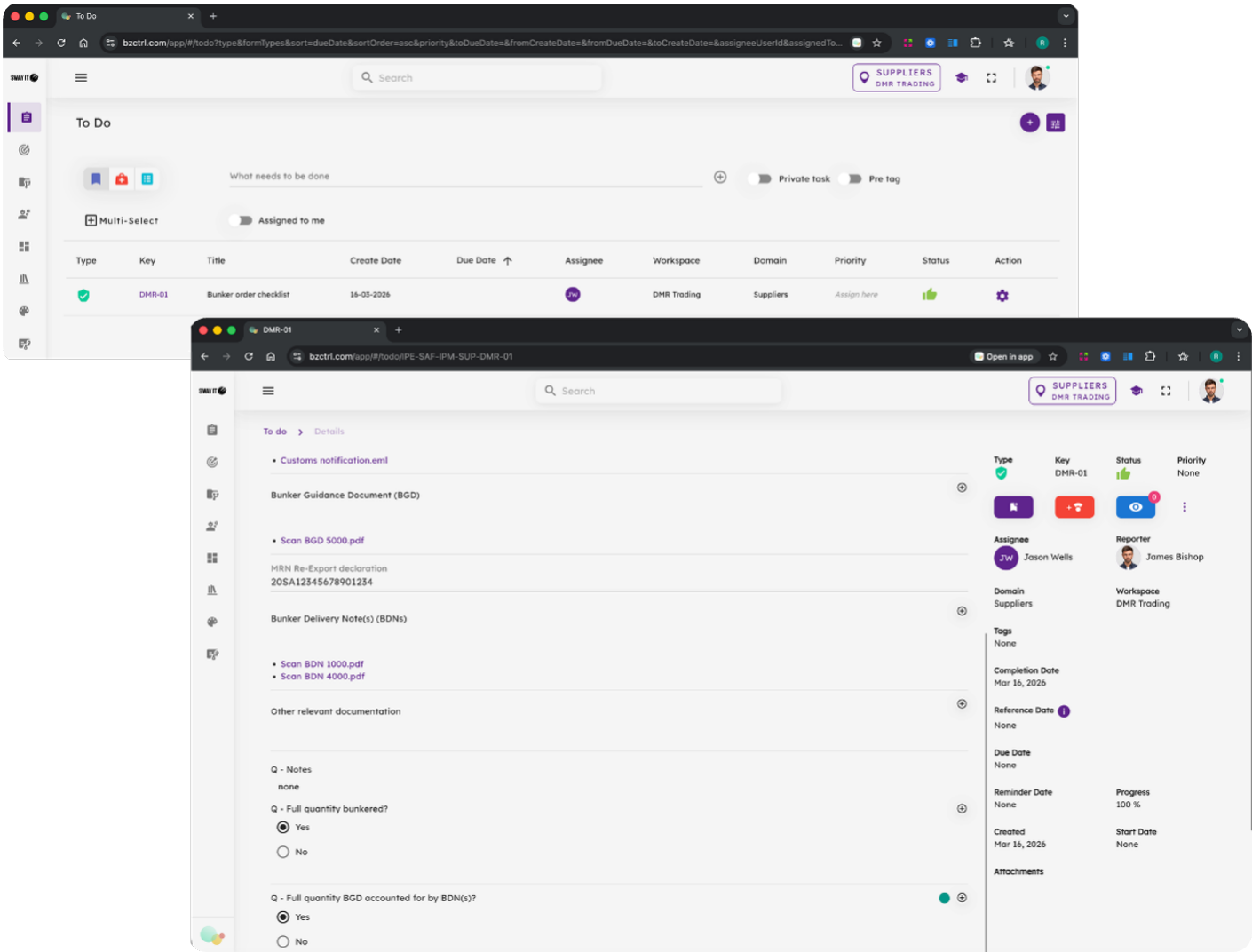
Created
Mar 16, 2026

Attachments

Select or drag file(s) from your computer

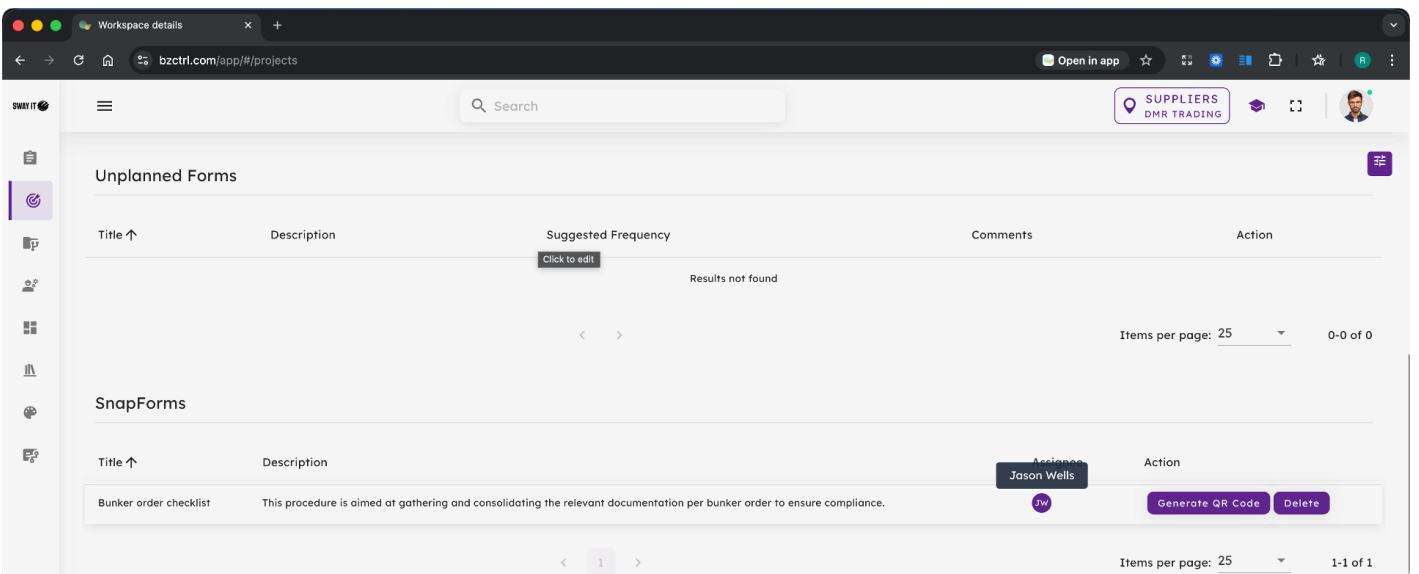
Reset Save Done

The company retains full access to all Forms, allowing it to monitor status and verify completeness and accuracy of the submitted information.

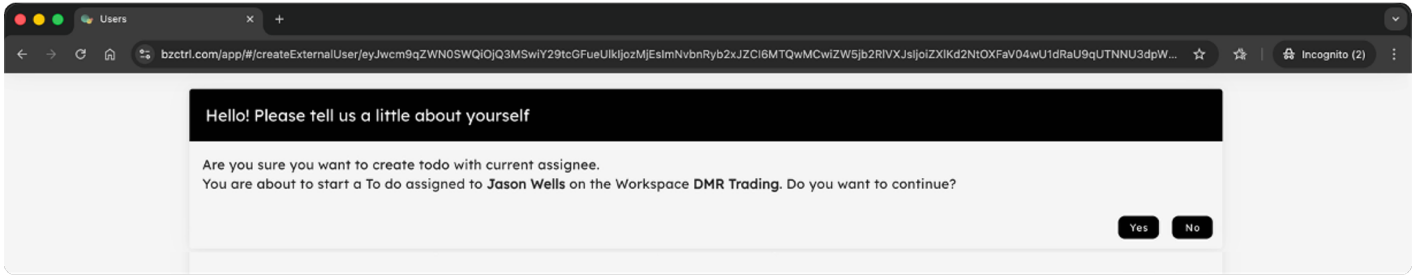


That's it! Everything is automatically and properly archived, including all relevant attachments.

Note that if it is already known that Jason or a specific group of users will be using the SnapForm, this can also be configured directly in advance.



This avoids the need to include full details each time the SnapForm is used; instead, usage can simply be confirmed.



Revision #8

Created 16 March 2026 09:51:26 by Remy Sway

Updated 28 May 2026 22:00:11 by Remy Sway