



5 Mobile Forms for HVAC Businesses

Two mobile devices displaying the goformz app. The tablet in the background shows a "WORK ORDER" form with fields for Company Name, Email, Address, Phone, Job Number, and Service Date. The smartphone in the foreground shows an "Invoice" form with fields for Company Name, Address, Phone, Email, First Name, Last Name, Sales Rep Name, Work Order #, Address, Job Start Date, Job End Date, City, State, Zip Code, Description of work completed, and a table for labor and materials. Both forms have a "Complete" button at the bottom.

Introduction

These five mobile forms are essential to every modern HVAC business.

While all of them share the same benefits of faster and more accurate data collection, instant submission of completed forms to the office and vastly improved record keeping, they also each have their own unique benefits and uses.

Feature Icons



Text Fields



Sketches



Checkboxes



Required



Images



Signature Fields



Cloud Storage



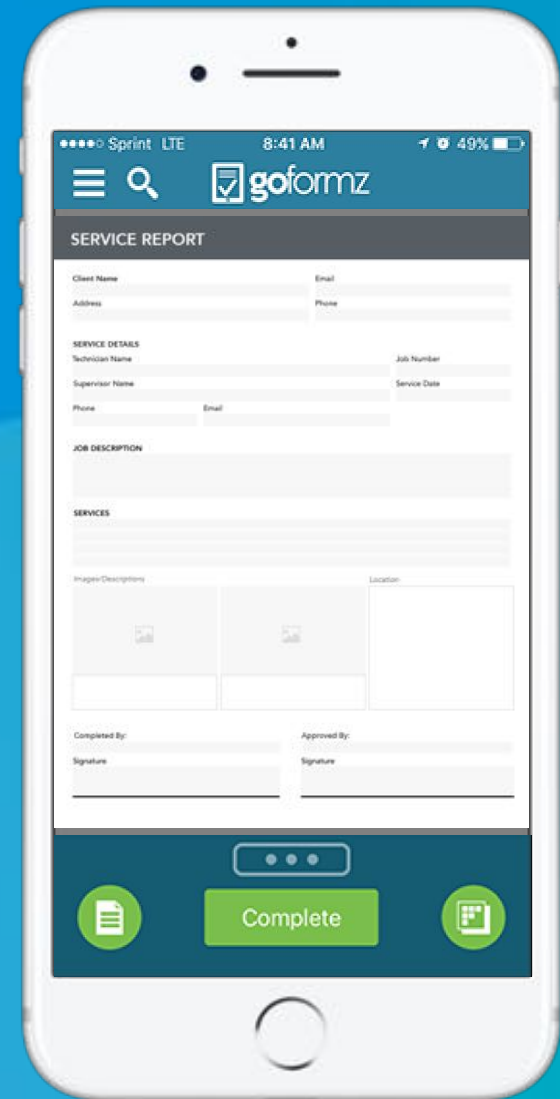
Date Fields



Drop Downs



GPS & Maps



Using Mobile Forms

Using a tablet or phone to fill out forms (aka mobile forms) is a powerful way to kickstart your digital transformation — allowing teams to work more efficiently, without sacrificing accuracy.

Some mobile forms can be app-like in appearance, while others are identical, digital versions of your existing forms and documents — which are great for minimizing training and avoiding disruptions to your day-to-day workflows. With GoFormz, you can easily toggle between these two 'views' to suit your needs (e.g. app-like forms are better for smaller screens) With mobile access to your documents, forms can be dispatched to field teams, completed from anywhere (even offline), and accessed instantly by the backoffice for immediate processing and analysis.

With intuitive features to guide data input, mobile forms can help your team reduce redundancies and errors, while expediting form completion and processing. These digital documents allow for the inclusion of new data types (like Images, Maps and Sketches) and simplified signature capture. Automated calculations ensure that totals and quotes are always accurately tallied.

Work Orders

Digital work orders improve the efficiency and accuracy of HVAC project detail collection, while elevating client-facing professionalism.

Mobile Form Work Orders allow for rapid documentation of project parameters, and instant document shareability with stakeholders. Forms can be instantly routed and emailed to key-players using Automated Workflows.

The image shows a tablet displaying a 'WORK ORDER' form from the goformz application. The form is organized into several sections: 'Company Info' with fields for Company Name, Address, Email, and Phone; 'CLIENT INFO' with fields for Name, Address, Phone, Job Number, and Service Date; 'JOB DESCRIPTION' with a large text area; 'LABOR & SERVICES' with a table for Hours, Rate, and Total; 'MATERIALS & PARTS' with a table for Quantity, Price, and Total; and 'EQUIPMENT & TOOLS' with a table for Hours, Rate, and Total. At the bottom, there is a signature line, a summary section for 'Total Labor & Services', 'Total Materials & Parts', 'Total Equipment & Tools', and a 'TOTAL' field.

KEY FEATURES



Date Field



Text Fields



Signatures



Auto-Email



Cloud Storage

Service Reports

With digitized Service Reports, project progress, updates and obstacles can be easily documented and stored in the Cloud.

Using Dynamic Field Properties (DFP's), users are only shown fields in the form that are relevant to specific job operations — streamlining field work completion and improving data accuracy. Digital Field Reports can also capture new data types (like Images, Sketches and Maps) to better communicate project progress.

The image shows a tablet screen displaying a 'SERVICE REPORT' form. The form is titled 'SERVICE REPORT' and has a 'goformz' logo at the top. It includes several sections: 'Client Name', 'Email', 'Address', 'Phone'; 'SERVICE DETAILS' with 'Technician Name', 'Job Number', 'Supervisor Name', 'Service Date', 'Phone', and 'Email'; 'JOB DESCRIPTION'; 'SERVICES'; 'Images/Descriptions' with two image upload boxes; 'Location'; 'Completed By' with a signature line; and 'Approved By' with a signature line.

KEY FEATURES



Images



Date Field



Sketches



GPS/Maps



Cloud Storage



Auto-Calculations

Quotes

Strike while the iron's hot — capture prospective clients as soon as possible with instantly generated digital Quotes.

Leverage Automatic Calculations to ensure Quote accuracy, and rapidly capture client approval with Digital Signatures. Completed Quotes can then be immediately shared with clients and team members.

The image shows a tablet displaying a digital quote form from 'goformz'. The form is titled 'QUOTE' and includes the following sections:

- Client Information:** Fields for Client Name, Email, Address, and Phone.
- TEAM DETAILS:** Fields for Technician Name, Job Number, Supervisor Name, Service Date, Phone, and Email.
- JOB DESCRIPTION:** A large text area for describing the job.
- MATERIALS & PARTS:** A table with columns for Quantity, Price, and Total.
- EQUIPMENT & TOOLS:** A table with columns for Hours, Rate, and Total.
- Other Fees:** Fields for Other Fees, Taxes, and Estimated Costs.
- Signatures:** Fields for 'Completed By:' and 'Signature'.

KEY FEATURES



Auto-Email



Date Field



Signatures



Auto-Calculations



Drop Downs



Cloud Storage

Invoices

Invoices tie together the original Work Order, and the description of the work completed, and their resulting expenses.

With automatic calculations, tally accurate project hours, materials and associated costs instantaneously. With custom workflows, notify team members when an invoice has been paid (or if an issue with payment has occurred), saving you significant time and money. With Cloud storage, both clients and team members can easily reference Invoice details.

The image shows a tablet displaying the goformz mobile app interface for creating an invoice. The screen is titled "Invoice" and features the goformz logo at the top. The interface includes several input fields for company and job information, a table for line items, and a summary section at the bottom.

Company Information:

- Company Name
- Address
- Phone
- Fax
- Email

Job Details:

- First Name
- Last Name
- Sales Rep Name
- Work Order #
- Address
- Job Start Date
- Job End Date
- City
- State
- Zip Code

Description of work completed:

Table:

| DATE | DESCRIPTION | RATE | HOURS | TOTAL |
|------|-------------|------|-------|-------|
| | | | | |
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| | | | | |
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| | | | | |
| | | | | |

Summary:

- Sub Total
- Other Fees
- Taxes
- Total Amount Due

KEY FEATURES



Auto-Calculations



Date Field



Signatures



Cloud Storage

Onsite safety should remain a constant priority across every operation. Simplify compliance with easy to complete checklists, instantly available once completed.

KEY FEATURES



2:53 PM

55%

Jobsite Safety Checklist

Client Name

Client Name

Project ID Number

Supervisor

Email

EMPLOYEE INFORMATION

First Name

Last Name

Employee ID Number

Title

Department

| SAFETY PROCEDURES | COMPLETED | NOTES |
|---|--|-------|
| Small description related to a specific safety measure that is being evaluated. | <input type="checkbox"/> YES <input type="checkbox"/> NO | |
| Small description related to a specific safety measure that is being evaluated. | <input type="checkbox"/> YES <input type="checkbox"/> NO | |
| Small description related to a specific safety measure that is being evaluated. | <input type="checkbox"/> YES <input type="checkbox"/> NO | |
| Small description related to a specific safety measure that is being evaluated. | <input type="checkbox"/> YES <input type="checkbox"/> NO | |
| Small description related to a specific safety measure that is being evaluated. | <input type="checkbox"/> YES <input type="checkbox"/> NO | |
| Small description related to a specific safety measure that is being evaluated. | <input type="checkbox"/> YES <input type="checkbox"/> NO | |
| Small description related to a specific safety measure that is being evaluated. | <input type="checkbox"/> YES <input type="checkbox"/> NO | |
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| Small description related to a specific safety measure that is being evaluated. | <input type="checkbox"/> YES <input type="checkbox"/> NO | |
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| Small description related to a specific safety measure that is being evaluated. | <input type="checkbox"/> YES <input type="checkbox"/> NO | |
| Small description related to a specific safety measure that is being evaluated. | <input type="checkbox"/> YES <input type="checkbox"/> NO | |
| Small description related to a specific safety measure that is being evaluated. | <input type="checkbox"/> YES <input type="checkbox"/> NO | |

Notes regarding weather, vehicles or additional concerns:

SIGNATURE

Signature

Date

Conclusion

Improving HVAC efficiency and accuracy is an ever-evolving task. With simplified documentation, improved accuracy and rapid responsiveness via mobile forms, your operation can run more efficiently (without stretching your budget).

Using powerful digital features like Images, GPS Coordinates, Cloud Storage and Signatures, HVAC documents can be instantly accessed and rapidly completed, so your team can focus on completing their work.

To read about some of our HVAC and Field Service customer success stories, visit <https://www.goformz.com/customers>.

GoFormz allows you to capture data electronically with mobile forms that look exactly like your current paper forms.

1



Upload your existing forms and documents

2



Make them smart with better data

3



Complete forms and docs anywhere, anytime

4



Store and review your data online

Thank You

Request a Free Demo and Sign Up for a Free 14-Day Trial:
www.goformz.com

