eBook

7 Reasons Why Smart Mobile Forms Are Better Than Fillable PDFs

Sales Form

Company Name

Address   City   State   Zipcode

Phone   Email

Sales Rep

Name   Phone   ID Number

Email   Service Date

Customer Info

First Name   Last Name   Phone

Address   City   State   Zipcode

Signature

goformz

Sales Form

Company Name

Address   City   State   Zipcode

Phone   Email

Sales Rep

Name   Phone   ID Number

Email   Service Date

Customer Info

First Name   Last Name   Phone

Address   City   State   Zipcode

Signature

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Introduction

As smartphones and tablets become increasingly prevalent in the workplace, teams are now compelled to transition their conventional paper-based methods into digital versions to facilitate the evolution of a mobile workforce. In fact, Statista Research Department forecasts that the population of mobile workers in the United States alone will increase from 78.5 million in 2020 to 93.5 million by 2024.

As businesses across the globe work to modernize their teams and processes, many companies adopt fillable PDFs as a straightforward method of converting their paper forms into electronic documents. These PDFs can be completed on a tablet or smartphone using dedicated apps, but the resulting electronic document often remains just as inflexible and frustrating as the original paper version, offering nothing more than a static snapshot of information. It lacks the vital element of being 'smart.'

Smart, mobile forms combine the simplicity of your existing document with the power and flexibility of digital tools. These forms can be accessed and used on any device. Unlike traditional forms, smart mobile forms are stored in the Cloud and can be equipped with automations and process management systems. This makes managing forms and extracting meaningful insights from your data far more efficient and seamless.

Let's delve deeper into the power and potential of mobile forms, and explore how your business can benefit from replacing its fillable PDFs.
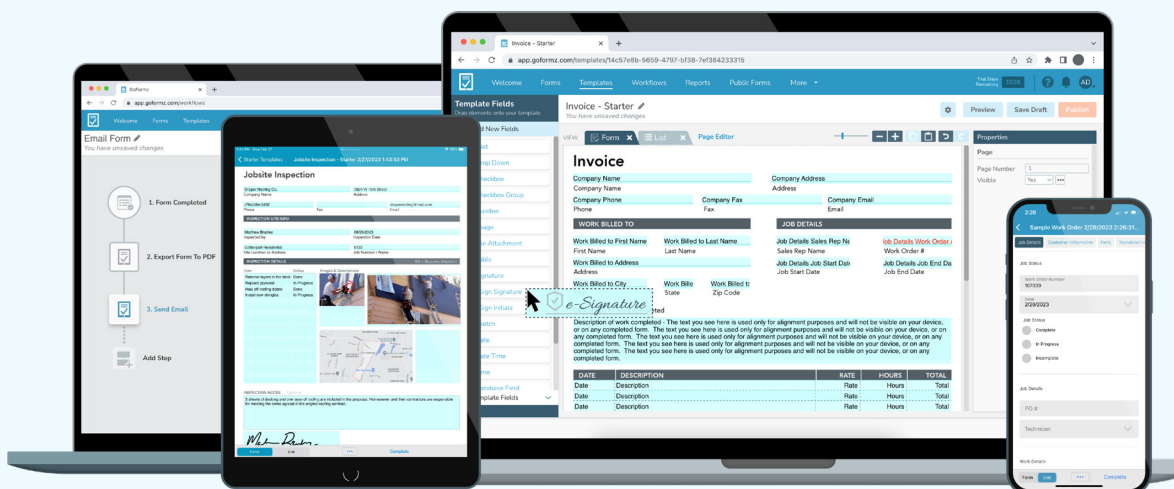
What Are Smart Mobile Forms?

Smart mobile forms transcend the limitations of ordinary flat e-documents (like fillable PDFs and basic web forms). These digital forms present a remarkable fusion of convenience and functionality, providing user-friendly forms on your mobile device that mirror the appearance of traditional paper versions. Most importantly, they deliver an efficient, interactive, and powerful user experience, that requires no retraining, code, or IT support. Different providers will offer varying options and features, but top-tier solutions should make it easy to find all the functions for your business needs.
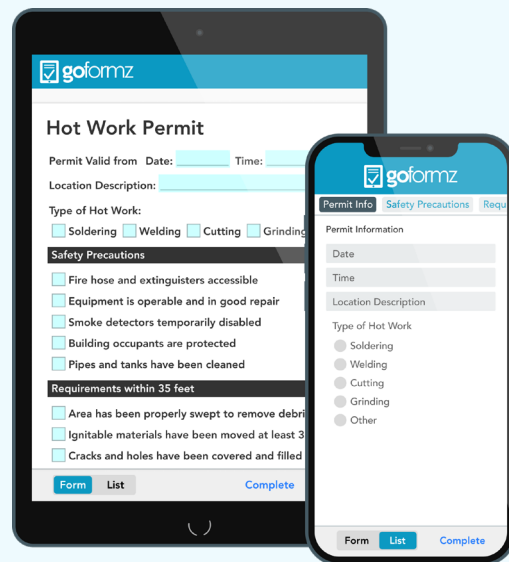
Here are the defining characteristics of best-in-class smart mobile forms:

- » They look identical to your paper forms or fillable PDFs
- » They are mobile-friendly and computer-friendly
- » They work offline, regardless of your location
- » Form data is instantaneous, searchable, and accessible in real-time
- » They empower users to collect new types of information such as *GPS*, *Images*, *Sketches*, *eSignatures*, *Barcodes*, and more
- » They automate *Calculations* and increase the speed of data entry with features like *Conditional Logic*
- » Collected data is searchable and shareable
- » Data and documents are automatically stored in the Cloud
- » Forms and data can be easily connected with other business systems such as CRMs, ERPs, HR platforms, and workflow solutions

In this eBook, we'll dive into the seven key differences between fillable PDFs and smart mobile forms, and discuss how digital forms will deliver extraordinary value to your business and users.

7 Reasons You'll Succeed With Mobile Forms

#1: Fill out Forms From Your Preferred Devices, Anywhere, at Any Time!

#2: Make Your Forms Dynamic

#3: Capture New Types of Information

#4: Embrace Automation

#5: Access and Route Completed Forms in Real-Time

#6: Connect Your Data to Your Existing Tech Stacks

#7: Dispatch Forms Pre-Populated With Data

#1 Fill Out Forms From Your Preferred Devices, Anywhere, at Any Time!

While fillable PDFs technically allow completion from any device, they lack an intuitive user experience that simplifies the form-filling process. Meanwhile, smart mobile forms offer a native, device-compatible solution, enabling your team to generate, fill out, and complete forms from any location using their preferred mobile devices.

Unlike pinching and zooming your way through PDF form fields, smart mobile forms provide a user-friendly, mobile-optimized viewing mode. With GoFormz, users can toggle between their original form formatting and a small-screen optimized viewing mode, where they swiftly enter information into an app-like, index of fields.
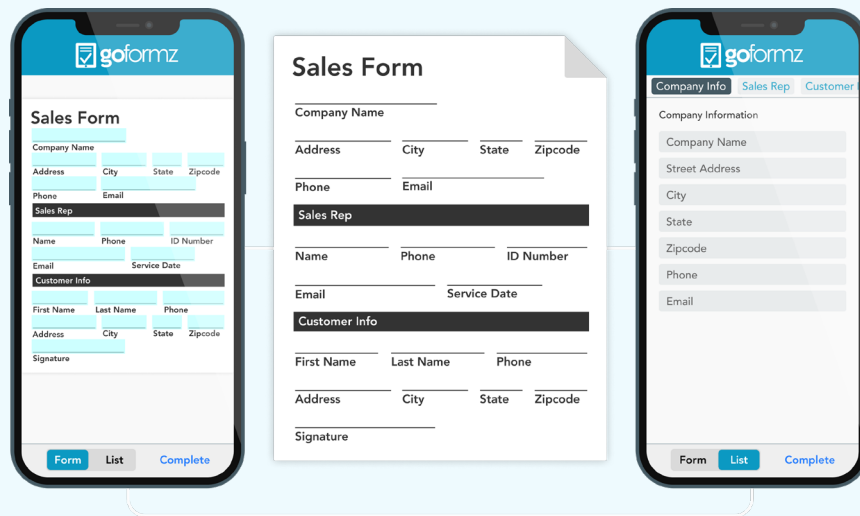
Finally, smart mobile forms provide the added advantage of real-time access to forms without the need for internet connectivity. Unlike fillable PDFs, which rely on an internet connection to access electronic documents on a mobile device, the most reliable mobile forms providers allow users to access and work on mobile forms from anywhere, regardless of internet availability. This ensures uninterrupted productivity and efficiency even in areas with limited or nonexistent internet access.

"One of the things we've really enjoyed about GoFormz is it's not platform-centric. It works on Android, it works on iOS, and it even works on Kindle." - Erin Rigby, I.T. Specialist, ALLWEST Testing & Engineering

#2 Make Your Forms Dynamic

While fillable PDFs sometimes offer basic annotation capabilities for forms, smart mobile forms take these capabilities to the next level. These dynamic forms can automate *Calculations*, seamlessly include *DataSources* to pre-fill corresponding fields accurately, and incorporate dynamic features, such as conditional if-then logic, for specified fields.

For example, if you are a field service professional who travels to hard-to-reach job sites, you can easily access a mobile form from your device, that automatically calculates field values for you and enforces the collection of highly accurate data through intuitive, *Conditional Logic*. In situations where it is cost-prohibitive to travel back to sites to re-gather information, it is crucial that you capture all the data needed while in the field, and don't spend more time than you have to doing calculations or entering incorrect data. This can also help limit your employees' time in potentially hazardous areas, as well as minimize time spent in the field compiling numbers or searching for client background information. Not to mention, your team will no longer be burdened by cumbersome binders of damage-prone paper documents.

While fillable PDFs may serve as useful annotation or presentation tools for completed or multi-media projects, smart mobile forms have emerged as true workhorses for data collection. They excel in streamlining complex processes and significantly enhance efficiency in form-filling and data management, making them a valuable asset for businesses and field teams alike.

> *"We saw an instant change in the quality of the data coming in. The conditional logic helped our project managers make sure all the right questions were answered and all the data was filled in before submitting a form." - Anthony Krake, Environmental Safety and Quality Management, Alpine Painting and Sandblasting Contractor*

#3 Capture New Types of Information

Fillable PDFs rely on static text input, typically limited to alphanumeric characters. However, smart mobile forms open up a world of possibilities by harnessing the full potential of your device's native resources, such as its camera and GPS location. This capability allows you to include a wide array of valuable, digital data types directly in your forms, such as *Images*, *Sketches*, *GPS* coordinates, and *File Attachments*. The result is a more dynamic and comprehensive form-filling experience, enabling users to capture and record diverse types of data effortlessly and accurately.

This gives you the ability to be more precise and thorough, creating more accurate documentation compiled of richer data. For example, as a field service professional performing an initial work order or job estimate, a mobile form gives you the added ability to record essential site details, instantly capture GPS locations, and take pictures of specific areas requiring additional attention. You can even sketch diagrams and highlight relevant areas on the images to capture a more comprehensive project description.

All this information is automatically stored as data within your form. Gone are the days of carrying a separate camera, estimating GPS locations, and later attaching this information to your rigid PDF documents. With a smart mobile form, you can conveniently capture pictures with your tablet, gather pinpointed GPS data directly from your device, and seamlessly integrate all the relevant details for more exhaustive and accurate documentation. This streamlines and strengthens communication, while ensuring that crucial data is efficiently captured in real-time, all in one place.

"We include pictures on our forms every day and I really like the file attachment field where we can attach additional files to the form." - Andrew Balavage, North Idaho Construction Services Manager, Budinger & Associates

#4 Embrace Automation

One of the most remarkable features of smart mobile forms is their ability to automate even the most mundane tasks. Completed forms can trigger *Automated Workflows* to perform various actions automatically, such as auto-emailing completed forms to colleagues, clients, partners, and more, uploading completed forms into Cloud storage, creating a new form, and much more. In contrast, once a fillable PDF is completed, it remains static, requiring manual efforts for any further routing or data analysis.
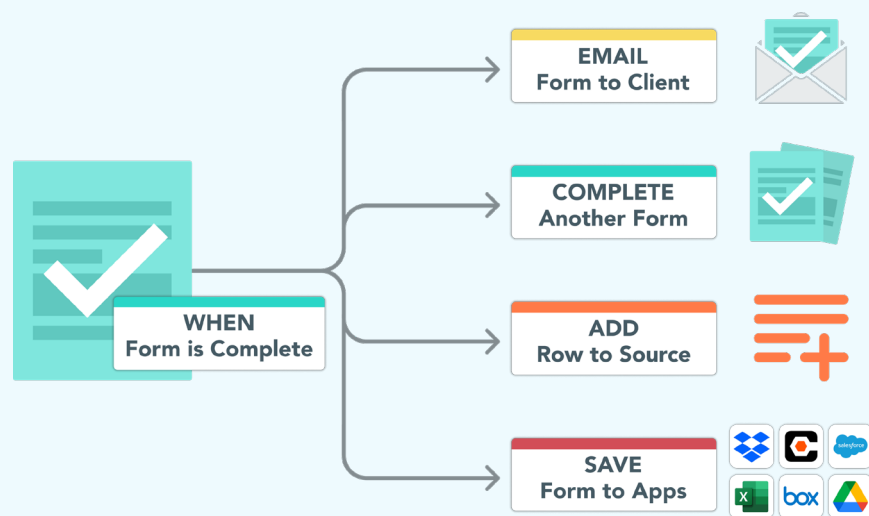
Automated Workflows go beyond just emailing and storing data. These workflows can be scheduled to perform automatic updates to spreadsheet rows, analytic dashboards and reports, and other key business process systems, all directly from the captured form data. Alternatively, static fillable PDFs are limited in their ability to extract specific data without the need for manual rekeying of information into designated areas or platforms.

The automation offered by smart mobile forms simplifies and expedites processes, reducing the need for manual intervention and streamlining communication and data management. This functionality adds a layer of efficiency to your business, enabling your team to focus on more business-critical tasks.

"The guys can fill out the electronic forms in a reduced time frame, and no longer have to fill out and physically mail or ship them to the main office." - Gary Ramsey, Specialty Asset Manager, Crux Subsurface Inc.

#5 Access and Route Completed Forms in Real-Time

Smart mobile forms offer a compelling advantage: the ability to access input data instantly, enabling your operation to swiftly respond to emerging obstacles. With immediate access to critical data, your business can enhance its agility, improving efficiency and elevating data quality. On the contrary, static fillable PDFs require manual data re-entry and often introduce delays in data extraction due to manual form delivery.
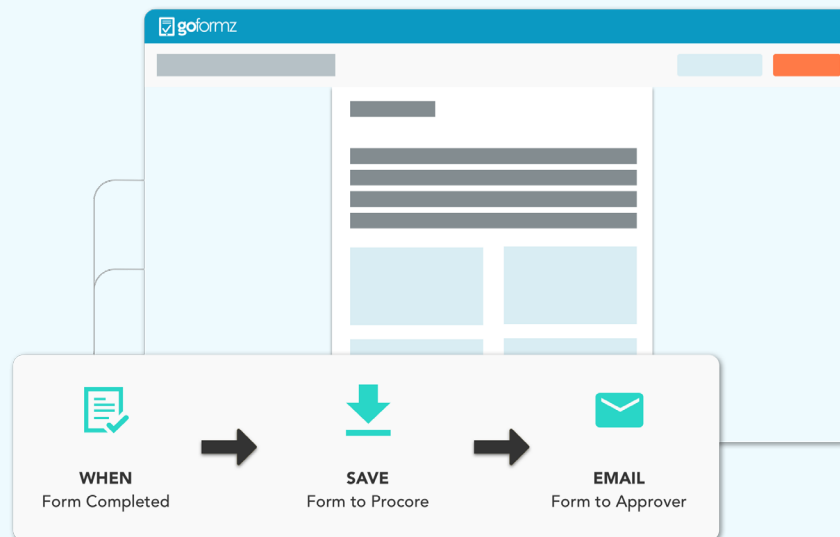

To illustrate the advantage of smart mobile forms, consider a work-related accident on a job site. For example, a site superintendent equipped with a mobile device can instantly complete a mobile incident report in real-time. This immediate response empowers the business to act swiftly, ensuring prompt action to prevent similar incidents from occurring again.

However, if the site superintendent lacked access to a smart mobile form and had to document the report on a standard PDF form, that would introduce multiple opportunities for delays. Any delay could create additional obstacles in processing the incident, leading to prolonged response times and increased challenges in addressing the issue effectively. The real-time capability of smart mobile forms proves invaluable in critical situations, providing businesses with the ability to respond promptly and take proactive measures to maintain a safe and efficient working environment.

#6 Connect Your Data to Your Existing Tech Stacks

Unlike fillable PDFs, which may only be uploaded to Cloud storage or attached to records in other software applications, smart mobile forms offer a more extensive range of functionalities through robust integration capabilities.

Smart mobile forms not only store the forms and data but also make them readily available to other critical business systems. Businesses often integrate smart mobile form systems with various other tech stacks, such as CRMs, ERPs, and HR systems. These seamless integration capabilities enhance data sharing and accessibility across various departments, streamlining workflows, and maximizing the value of captured information within the organization.
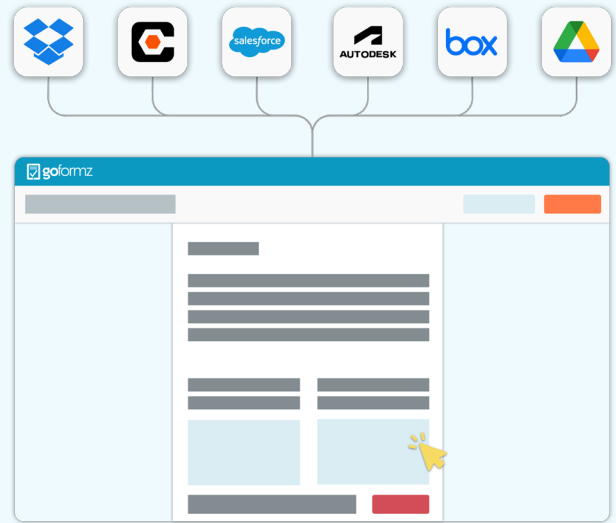
While fillable PDFs rely on manual storage and lack the ability to extract specific information, smart mobile forms offer advanced capabilities. With mobile forms, you can effortlessly extract specific data points and store it in individual files according to your preferences. For instance, if a work order includes *Images, Sketches*, updated client information, and other job-related details, the smart mobile form allows you to route the images to a specific client folder, while the sketches can be directed to another file within the same client folder, designated for a colleague's review. This powerful functionality ensures data organization is seamless and tailored to match your unique business needs.

> *"Many of the fields in GoFormz are mapped to a Salesforce case. So when GoFormz syncs back into Salesforce all of this is automatically imported and used to update that case. It has really helped us significantly, especially since we are growing so fast and needed something scalable."* - Gordon Doleschall, Operations Director, ChartWorld

#7 Dispatch Forms Pre-Populated With Data

With smart mobile forms, you have the remarkable capability to dispatch forms to field teams, pre-populated with information from connected databases and applications. For example, mobile forms can be dispatched with data pre-filled from Procore records or Salesforce objects. This powerful functionality significantly expedites form completion while enhancing the accuracy and comprehensiveness of the captured data. By leveraging data from connected systems, smart mobile forms streamline the form-filling process, eliminating the need for redundant data entry and minimizing opportunities for errors.
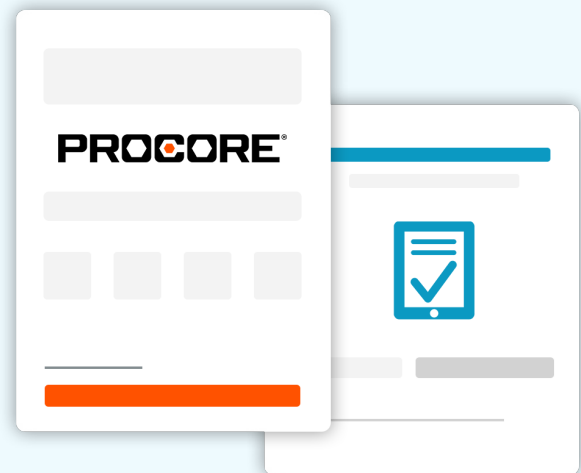
A stagnant fillable PDF, however, requires repetitive data entries, leading to slower form-filling processes and a higher likelihood of human error. The efficiency and accuracy provided by smart mobile forms make them a superior choice, ensuring a more seamless and error-free form completion experience for users.

> *"The GoFormz and Procore integration has definitely improved our workflow. More importantly, perception is key in our business. It's something we've been able to sell to our clients, this Balmain & Care process."* - Mick O'Connell, Construction Manager, Balmain & Co.

Why Choose GoFormz for Mobile Forms?

GoFormz is the only mobile forms provider capable of preserving the original look and feel of existing paper forms or rigid PDFs, with the added functionality of an online form. This capability empowers your business to retain its branding, streamline user adoption, and adhere to specific formatting demands.

By offering a user-friendly, drag-and-drop form builder, GoFormz ensures a streamlined form-building experience for all users, regardless of their technological proficiency (no code required). This intuitive interface enables businesses to effortlessly create customized mobile forms that cater precisely to their unique requirements.
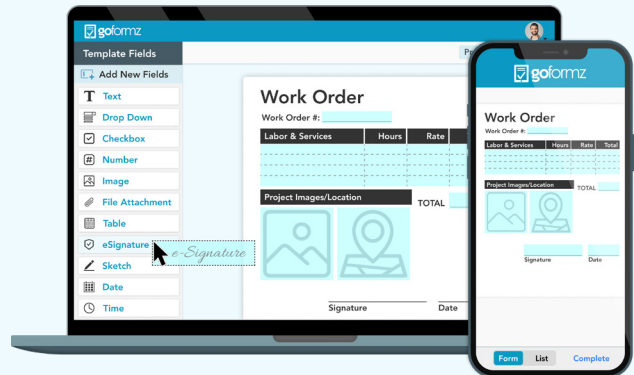
Mobile forms can be equipped with various data types like *Barcodes, GPS, Sketches, Images, eSignatures, Instant Calculations*, and even easy-to-use form *Logic* to enrich data collection. GoFormz also provides an alternative viewing mode designed for mobile devices called *List View*, which empowers form creators to create forms from scratch without requiring a pre-existing form.

Whether you're simply looking to transform your fillable PDFs into smart mobile forms or require a solution to help your business transition into a mobile workforce, GoFormz can simplify your work life in numerous ways:

» Eliminating obstacles in data collection, resulting in substantial time, cost, and resource savings

» Generating a constant stream of accurate and reliable data across all connected systems

» Enhancing communication and collaboration between departments, remote facilities, and customers, leading to enhanced productivity in the workplace

» Streamlining previously manual processes like manual form delivery and rekeying information through powerful automation capabilities
…and so much more!

Additional Resources

If you found this eBook helpful and are looking for additional reasons as to why mobile forms are better than fillable forms or are simply looking for further information to kickstart your digital transformation journey, contact our team or check out the helpful resources listed below:

Helpful Blogs

> » Don't Settle for a PDF When You Need a Digital Form
> » How to Convert Your PDF Form Into A Fillable Web Form
> » How to Easily Convert Your PDFs Into Fillable Online Forms
> » 5 Reasons to Convert Your PDFs into Online Fillable Forms

Customers Who Switched from Fillable PDFs to Mobile Forms

> » Reynolds Machinery
> » Lennon, Smith, Souleret Engineering, Inc.

Other Valuable Resources

> » How to Convert Your PDFs Into Fillable Forms
> » How Mobile Forms Work