

7 Forms for Small Businesses



Introduction

Ready to modernize your operations? This eBook reviews seven mobile forms that will digitally transform your small business. Regardless of your preferred mobile device, business size or budget, these forms will be instrumental in elevating your digital success.

Running a small business requires an all-hands-on-deck approach—and often feels like you could use an extra pair. It's time for your documents to do the heavy-lifting. Adopting mobile forms into your workflow and daily routines allows your team to rapidly conquer to-do lists, seamlessly collaborate and quickly respond to customer inquiry.

Invoice

Proudly present your customers with professional, automated billing documents. Expedite payment processing with modernized and digital billing—keeping projects on track, payments well documented and key-players informed. With a variety of available features you can rest easy knowing your invoices will always be accurate, detailed and prompt.

SMALL BUSINESS BENEFITS

- ✓ **Get Organized:** Store documents in the Cloud for automatic record keeping that you can access from anywhere, anytime.
- ✓ **Save Time:** Avoid time-consuming manual handoffs; leverage streamlined, automated workflows—delivering invoices instantly, and resulting in faster processing.
- ✓ **Stay Informed:** Keep team members in-the-know with triggered alerts that notify involved parties of payment processing progress.

KEY FEATURES

- ✓ Auto Calculations
- ✓ Automated Workflows
- ✓ Pre-Populated Fields

The image shows a tablet displaying a mobile application interface for creating an invoice. The app is titled 'goformz' and shows a form with the following sections:

- Company Information:** Fields for Company Name, Address, Phone, Fax, and Email.
- WORK BILLED TO:** Fields for First Name, Last Name, Address, City, State, and Zip Code.
- JOB DETAILS:** Fields for Sales Rep Name, Work Order #, Job Start Date, and Job End Date.
- Description of work completed:** A large text area for describing the work.
- Table:** A table with columns for DATE, DESCRIPTION, RATE, HOURS, and TOTAL.
- Payment Terms:** A field for entering payment terms.
- Sub Total:** A field for the subtotal.
- Other Fees:** A field for other fees.
- Taxes:** A field for taxes.
- Total Amount Due:** A field for the total amount due.

Timesheet

Relying on scribbled math, bulletin boards and hand tallied hours for pay cycle data is clumsy work. Keeping track of employee hours is simple with mobile forms. With the GoFormz Employee Timesheet, hours are automatically tallied and instantly submitted to payroll upon completion. Employees and management alike gain further insight into staff hours with access to timesheets anywhere, on any device.

SMALL BUSINESS BENEFITS

- ✓ **Streamline Approvals:** Automate workflows to instantly deliver timesheets to supervisors or payroll, as soon as forms are completed and signed by employees.
- ✓ **Cut the Clutter:** Mobile forms and Cloud storage allows you to avoid mountains of timesheets and to reduce storage demands and costs.
- ✓ **Simplify Calculations:** No need to manually crunch numbers—save time and avoid human error with auto-calculations.

KEY FEATURES

- ✓ Auto Calculations
- ✓ Automated Workflows
- ✓ Signature Fields
- ✓ Document-level Tags

The screenshot shows the GoFormz Employee Timesheet mobile application interface. At the top, the status bar displays the time as 2:04 PM and the battery level at 54%. The app header includes the GoFormz logo and navigation icons. The main form is titled "Employee Timesheet" and contains several sections:

- Company Information:** Fields for Company Name and Address.
- Contact Information:** Fields for Phone, Fax, and Email.
- EMPLOYEE INFORMATION:** Fields for First Name, Last Name, Start Date, Email or Phone, Department, and End Date.
- PAY PERIOD:** A section for recording time worked, featuring a table with columns for Date, Day, Job Description, Time In, Time Out, and Hours.
- Summary:** Fields for Total Hours, Wage Rate, and Earned Wage.
- Signatures:** Fields for Employee Name, Supervisor Name, Employee Signature, and Supervisor Signature.

At the bottom of the screen, there are three dots indicating a multi-page form structure.

Employee Evaluation

Growing your business means increasing your workforce—don't let vital staff records slip through the cracks. With this mobile form, record keeping and performance management becomes seamlessly scalable. Secure Cloud storage allows your business to accumulate confidential records, without risking sensitive data.

Design performance metrics as unique as your staff with customizable measurements, so you can keep track of employee growth, hindrances and feedback as you see fit.

SMALL BUSINESS BENEFITS

- ✓ **Scalable Performance Tracking:** Rapidly reference past evaluations to better track growth. Augment performance assessments with past notes of growth and areas for improvement.
- ✓ **Expand Freely:** As your business grows, access synced data from new locations, keeping new management teams informed.
- ✓ **Measure Accurately:** One size does not fit all—customize your evaluations with unique parameters to best record employee growth.

KEY FEATURES

- ✓ Access Forms from Anywhere
- ✓ Customer Performance Measurements
- ✓ Likert Scale

The screenshot shows a mobile application interface for 'Employee Evaluation' by goformz. The form is structured as follows:

- Header:** goformz logo, time (2:05 PM), and battery status (54%).
- Employee Information:** Fields for Company Name, Address, Phone, Fax, and Email.
- EMPLOYEE INFORMATION:** Fields for First Name, Last Name, Employee ID Number, Title, and Department.
- REVIEWER INFORMATION:** Fields for First Name, Last Name, and Title.
- PERFORMANCE MEASURE:** A table with columns for 'PERFORMANCE MEASURE', 'RATING', and 'NOTES'. The 'RATING' column contains a Likert scale with five options: Poor, Fair, Average, Good, and Excellent, each with a corresponding icon.
- REVIEWER SIGNATURE:** A section for the reviewer's signature and date.

Work Order

Never miss a detail. Used to gather important customer information and project details required to complete a job, the mobile Work Order form is crucial to success. Empower your team to collect and deliver vital project information with powerful features and automated workflows (keeping key-players informed and updated).

The screenshot shows a mobile application interface for a 'WORK ORDER' form. The top bar includes the 'goformz' logo and the time '3:03 PM'. The form is divided into several sections: 'Company Name' with fields for Name, Address, Email, and Phone; 'CLIENT INFO' with fields for Name, Address, Phone, Email, Job Number (1032), and Service Date (2016-09-23); 'JOB DESCRIPTION' with a large text area; 'LABOR & SERVICES' with a table with columns for Hours, Rate, and Total; 'MATERIALS & PARTS' with a table with columns for Quantity, Price, and Total; 'EQUIPMENT & TOOLS' with a table with columns for Hours, Rate, and Total; and a final section for 'Approved by' with a signature field and a summary of totals: Total Labor & Services, Total Materials & Parts, Total Equipment & Tools, and a grand TOTAL.

SMALL BUSINESS BENEFITS

- ✓ **Rapidly Gather Data:** Simplify data collection. Record crucial project details (e.g. request date, description, etc.) efficiently from a phone or tablet, and instantly access the data in real time.
- ✓ **Access Orders Anywhere:** Don't let paper-based orders tie you down—mobile forms allow team members to access Work Order details from the office or on the go.
- ✓ **Accurate & Rapid Calculations:** With automated calculations, deliver accurate project metrics efficiently, and eliminate the risk of human error.

KEY FEATURES

- ✓ Auto Calculations
- ✓ Date Fields
- ✓ Descriptive Fields (i.e. Job Description, Materials)
- ✓ Signature Fields

Sign-In Sheet

Keep track of your business visitors with centralized, searchable record keeping and Cloud based storage. Easily capture important visitor details with dynamic fields and enforce legal processes with electronic signatures. Alert key-players of visitor arrivals and departures with triggered alerts—keeping your team responsive and informed.

SMALL BUSINESS BENEFITS

- ✓ **Centralize Your Record Keeping:** Document important visitor contact information. With secure Cloud storage, access historic visitor records and details anytime, anywhere.
- ✓ **Locate Records Quickly:** Reduce visitor-processing stumbling blocks with searchable data and organizational tools. Painlessly reference past visit information across various locations.
- ✓ **Cut Costs:** Reduce administrative costs. Eliminate paper forms and significantly curtail demands for storage space and administrative time.

KEY FEATURES

- ✓ Alerts
- ✓ Signature Field
- ✓ Date Fields
- ✓ Descriptive Fields (i.e. reason for visit, etc.)

The image shows a tablet displaying the 'Visitor Sign-In Sheet' app. The interface is clean and professional, with a teal header bar containing the 'goformz' logo and navigation icons. Below the header, there are several input fields for visitor information: 'Company Name', 'Address', 'Phone', 'Fax', and 'Email'. The main part of the screen is a table with the following columns: 'DATE', 'NAME', 'REASON FOR VISIT', 'TIME IN', 'SIGNATURE', 'TIME OUT', and 'SIGNATURE'. The table is currently empty, with only the header row visible. At the bottom of the screen, there is a 'Thank you for visiting' message. The tablet's status bar at the top shows the time as 2:06 PM and the battery level at 54%.

Project Proposal

Rapidly provide prospective clients with professional, impeccably branded digital proposals, easily capture client signatures and securely store forms in the Cloud.

With auto-calculations, estimate project costs quickly, while avoiding manual calculation errors. Swiftly locate proposal details with digital searchability. Automatically route approved proposals to key-players.

SMALL BUSINESS BENEFITS

- ✓ **Reduce Human Error:** Prevent mathematical errors, empty fields and basic mistakes. Use field-level rules, auto-calculations and required fields.
- ✓ **Refine Your Brand Image:** Present prospective clients with professional, uniquely branded documents, reflective of your business. Change your logo, background image and form visuals as you see fit.
- ✓ **Prevent Disputes:** Ensure involved parties sign off on job specs and requirements (including terms & conditions), to safeguard your business from misunderstandings and operational snafus.

KEY FEATURES

- ✓ Signature Field
- ✓ Descriptive Fields (i.e. Terms and Conditions)
- ✓ Required Fields
- ✓ Auto Calculations

The screenshot shows a mobile application interface for creating a 'Job Proposal'. The top navigation bar includes the 'goformz' logo and the time '9:39 AM'. The form is divided into several sections:

- Company Information:** Fields for Company Name, Address, Phone, Fax, and Email.
- Customer Information:** Fields for Sales Rep, First Name, Last Name, Address, City, State, Zip, and Service Date.
- Job Details:** Fields for Job Description and Terms & Conditions (marked as optional).
- Cost Breakdown:** Two tables for 'LABOR & SERVICES' and 'MATERIALS, EQUIPMENT & PARTS', each with columns for Hours, Price, and Total.
- Project Images:** A section for uploading images, with a 'TOTAL' field for the overall project cost.
- Signatures:** Fields for 'SUBMITTED BY' (Name, Date, Signature) and 'APPROVER' (Name, Date, Signature).

Customer Feedback Form

With this mobile form, processing and responding to customer inquiry is a breeze.

Immediately respond to customer concerns with meaningful, current information, routed directly to managers and customer service reps. Use automation and real-time data to streamline communications with clients.

SMALL BUSINESS BENEFITS

- ✓ **Encourage Customer-Centric Communication:** Auto-route customer submitted forms to relevant departments, and vice-versa.
- ✓ **Respond to Customers In Real-Time:** Quickly address developing customer concerns with the ability to pull real-time data, anywhere.
- ✓ **Put Incidents In Context:** Gain further visibility into customer inquiry and concerns with Likert scale ratings, text fields for comments, and GPS data that time stamps where and when a customer filed their complaint.

KEY FEATURES

- ✓ Auto-Routing
- ✓ Real-Time Data
- ✓ GPS Data & Maps
- ✓ Likert Scale & Custom Ratings
- ✓ Time Stamps
- ✓ Signature Fields

9:42 AM 62%

goformz

Customer Feedback Form

Company Name _____ Address _____
Phone _____ Fax _____ Email _____

CUSTOMER INFORMATION

First Name _____ Last Name _____ Email _____ Phone _____
Address _____ City _____ State _____ ZIP Code _____

COMPLAINT/FEEDBACK LOCATION & TIME

GPS Map _____ Date: 2017-03-08 _____
Time: 9:41 AM _____

PLEASE DESCRIBE IN DETAIL THE NATURE OF YOUR COMPLAINT

PLEASE EXPLAIN WHAT ACTIONS CAN BE TAKEN TO HELP RESOLVE THIS ISSUE

WHO WAS YOUR COMPLAINT ORIGINALLY REPORTED TO

HOW WOULD YOU RATE OUR BUSINESS'S RESPONSE TO YOUR CONCERNS

Poor Fair Average Good Excellent

ADDITIONAL NOTES

Print Name _____ Signature _____

Conclusion

As a small business, it's difficult to prioritize customer satisfaction, employee development, and your bottom line—luckily, with powerful, versatile mobile forms, it doesn't have to be. Empower your documents to do more with your data. Using GoFormz, automate your operations with mobile forms, to better respond to customer, staff and monetary needs—without adding to your workload.

With GoFormz you can build new forms as well as create identical, digital versions of your legacy paper forms; keeping your branding personal and familiar, while opting for a more professional and modern form solution.

The image displays two versions of a 'Work Order Report' form for 'AXIS MOBILITY'. On the left is a physical paper form, and on the right is a digital version shown on a tablet. Both forms are identical in layout and content.

AXIS MOBILITY
12345 Main St.
Suite 1202
San Diego, CA 92109
(800) 867-5309

Work Order Report

Company Name: _____
Phone: _____
Address: _____
City: _____ State: _____ ZIP: _____
PO #: _____
Technician: _____

WORK ORDER #: _____ DATE: _____
JOB STATUS: Completed In Progress Incomplete

Reported Problem

Parts Used

Mfg.	Part Number	Description	Quantity	Unit Price	Total Price

Discount Level: _____ Discount: _____ Subtotal: _____
Tax Rate: _____ Tax: _____ Adjusted: _____
Total: _____

Hours

Technician Name	Start Time	End Time	Regular Hours	Overtime Hours	Total Hours

Job Totals: _____

Customer Signature: _____
Technician Signature: _____

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

