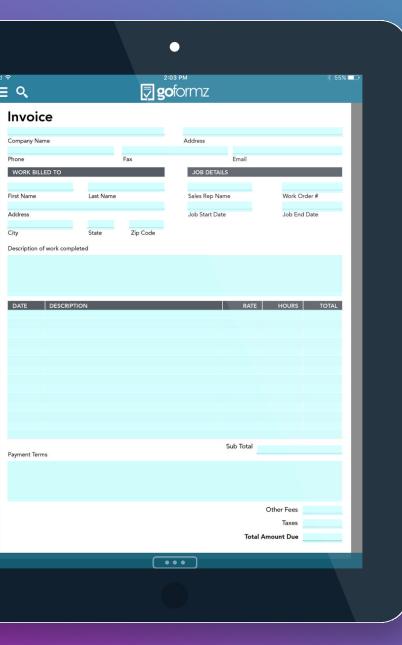




## Introduction

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.



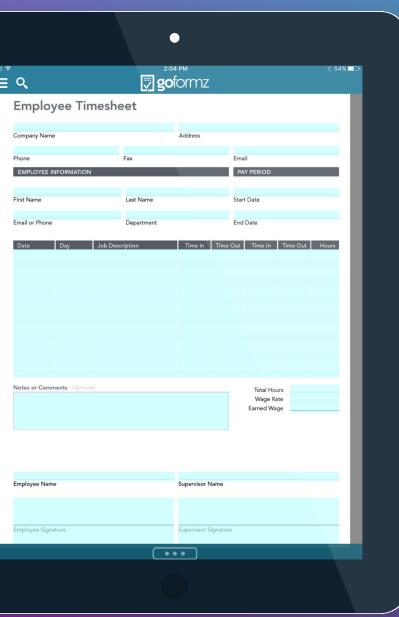
### Invoice

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 keyplayers 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.

- Auto Calculations
- Automated Workflows
- Pre-Populated Fields



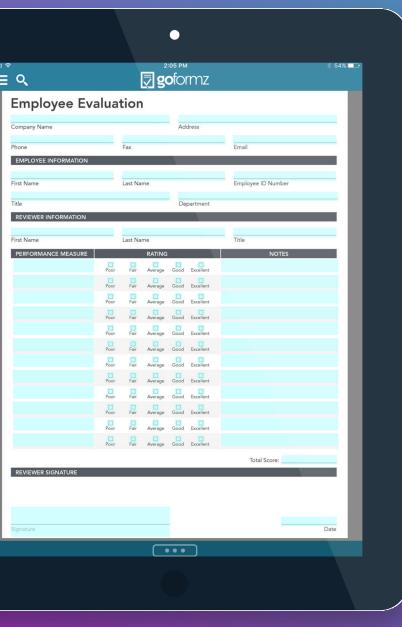
### Timesheet

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.

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



# **Employee Evaluation**

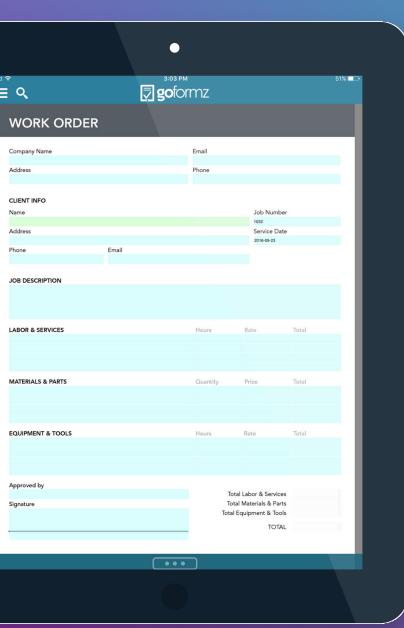
Growing your business means increasing your workforce—don't let vital staff records slip through the cracks. With this mobile form, record keeping and performance management becomes seamlessly scalable. Secure Cloud storage allows your business to accumulate confidential records, without risking sensitive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

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



## 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).

### **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 downmobile 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.

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



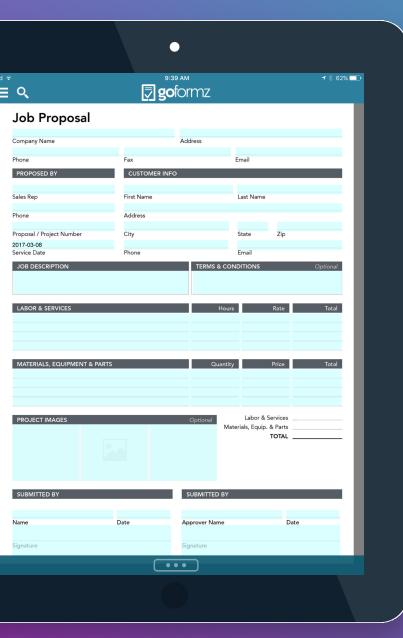
# Sign-In Sheet

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.

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



# Project Proposal

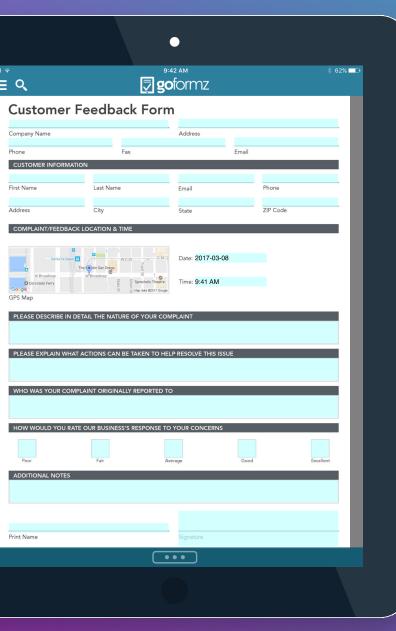
Rapidly provide prospective clients with professional, impeccably branded digital proposals, easily capture client signatures and securely store forms in the Cloud.

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.

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



# 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.

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

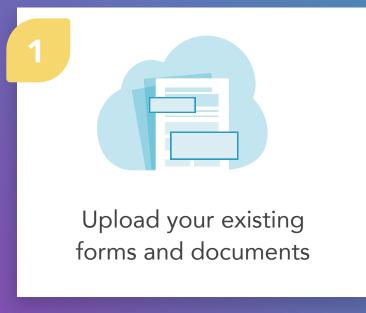
## Conclusion

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.

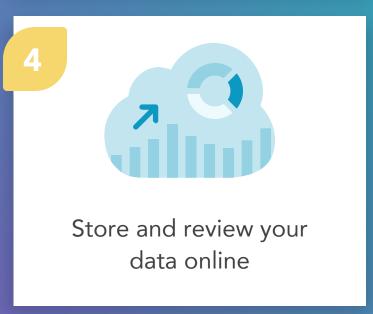


# GoFormz allows you to capture data electronically with mobile forms that look exactly like your current paper forms.









# Thank You

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

