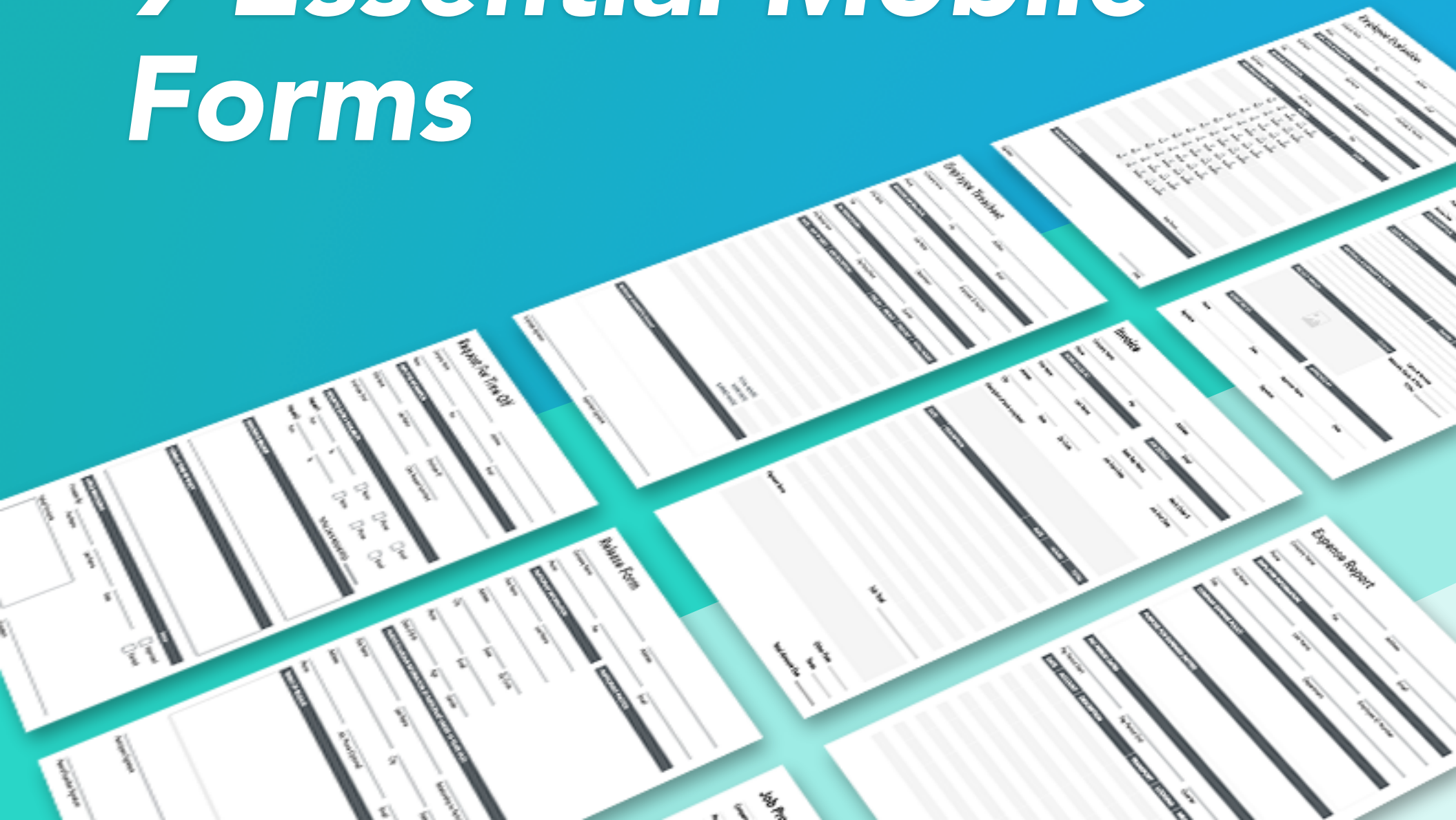


9 Essential Mobile Forms



Introduction

Digitizing your forms and using them on mobile devices can transform your business and improve your bottom line. This eBook reviews nine essential mobile forms that many businesses are using today. Whether you use these forms on a tablet, phone or even on a desktop computer, they modernize your day-to-day business tasks and help you save both time and money.

In this eBook we break down the details of each form and highlight the characteristics, benefits and advantages of using a mobile device to fill out these forms. We also focus on the key features that make each form practical, efficient, and powerful.

KEY FEATURE LEGEND



Signature Fields



GPS & Maps



Automatic Calculations



Secure Cloud Storage



Smart Workflow Logic

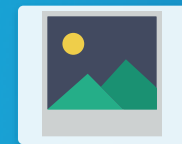


Image Fields

Work Order

Work orders record important details about job requests and services. This form can be particularly critical for businesses with highly detailed projects as it captures specific information that will later be used for billing.

MOBILE FORM BENEFITS

- ✓ Automatically calculates totals and grand totals
- ✓ Securely stored in the Cloud
- ✓ Form and Data are easily searchable (for future review)
- ✓ Accessible on any mobile device

CRITICAL INFORMATION

- ✓ Request date
- ✓ Customer details
- ✓ Job description
- ✓ Prices related to product or service
- ✓ Total cost
- ✓ Signature (blanket authorization)

The image shows a tablet displaying the 'goformz' mobile app interface for a 'WORK ORDER' form. The form is organized into several sections:

- Company Info:** Fields for Company Name, Address, Email, and Phone.
- CLIENT INFO:** Fields for Name, Address, Phone, Email, Job Number (1032), and Service Date (2016-09-23).
- JOB DESCRIPTION:** A large text area for describing the job.
- LABOR & SERVICES:** A table with columns for Hours, Rate, and Total.
- MATERIALS & PARTS:** A table with columns for Quantity, Price, and Total.
- EQUIPMENT & TOOLS:** A table with columns for Hours, Rate, and Total.
- Summary Section:** Includes a signature line, a line for 'Approved by', and a section for totals: Total Labor & Services, Total Materials & Parts, Total Equipment & Tools, and a grand TOTAL.

FEATURES



Request For Time Off

This form is used by employees to formally submit requests for time off of work. It is a key part of the request & approval process and serves as a useful record keeping solution. Using a mobile version makes the process more efficient, avoiding administrative headaches caused by vacation snafus and last-minute coverage drills.

MOBILE FORM BENEFITS

- ✓ Calendar picker for easy date selection
- ✓ Total days requested are automatically calculated
- ✓ Upon completion, form is Immediately available for approval (no need to physically hand-in form to office)
- ✓ Faster processing time due to instant submission (approve in seconds)
- ✓ Effective record-keeping

CRITICAL INFORMATION

- ✓ Thorough employee information
- ✓ Requested time-off details, dates and reasons
- ✓ Posted company time-off policy
- ✓ Approver's signature and comments

The image shows a tablet displaying a mobile version of the 'Request For Time Off' form. The form is titled 'Request For Time Off' and includes the following sections:

- Company Information:** Fields for Company Name, Address, Phone, Fax, and Email.
- EMPLOYEE INFORMATION:** Fields for First Name, Last Name, Employee ID, Employee Email, and Date Request Submitted.
- REQUESTED DATES & AVAILABILITY:** Two request entries (Request 1 and Request 2) with 'From' and 'To' date pickers, and checkboxes for 'None', 'Phone', and 'Email'. A 'TOTAL DAYS REQUESTED' field shows '0'.
- REASON FOR REQUEST:** A large text area for the employee to provide details.
- COMPANY TIME OFF POLICY:** A large text area for the company's time-off policy.
- OFFICE PROCESSING:** Fields for 'Processed By' (First Name, Last Name, Date) and checkboxes for 'Approved' and 'Denied'. A 'Status Comments' field is also present.

The form is displayed on a tablet, and the status is currently 'Approved'.

FEATURES



Sign-In Sheet

These forms track office visitors and capture important details that are valuable for record keeping - they can even notify individuals when visitors arrive. With these mobile forms you can also learn a great deal about the type and profile of your visitors. Reduce paperwork, enforce legal process and simplify record keeping.

MOBILE FORM BENEFITS

- ✓ Improves record keeping by centralizing visitor records in the Cloud
- ✓ Visitor data is easily searchable
- ✓ Reduces administrative costs (no physical storage or paper use)
- ✓ Sends alert to the person being visited with details regarding the visit
- ✓ Alerts when visitors have not checked out

CRITICAL INFORMATION

- ✓ Visitor details and credentials
- ✓ Reason for visit and who is being visited
- ✓ Visitor check-in and check-out times (with signature)

2:06 PM 54%

goformz

Visitor Sign-In Sheet

Company Name _____ Address _____

Phone _____ Fax _____ Email _____

DATE	NAME	REASON FOR VISIT	TIME IN	SIGNATURE	TIME OUT	SIGNATURE

Thank you for visiting

FEATURES



Employee Timesheet

Timesheets track the total hours an employee has worked during a pay cycle. Many time tracking solutions in the market claim to automate and ease this process, yet are expensive & overly complicated. A mobile form timesheet is an effective and affordable way to automate processing and for your employees to track their hours.

MOBILE FORM BENEFITS

- ✓ Automatically tallies total hours worked
- ✓ Accessible from any employee mobile device
- ✓ Automated validations prior to form submission
- ✓ Instantly submitted to payroll administrators when completed

CRITICAL INFORMATION

- ✓ Employee information
- ✓ Pay period start and end dates
- ✓ Daily entries (date, day of week, job details, time in/time out)
- ✓ Daily total hours
- ✓ Pay period total hours
- ✓ Earned wage details
- ✓ Employee and supervisor name and signature

The image shows a tablet displaying a mobile application interface for an 'Employee Timesheet'. The app is branded with 'goformz'. The form is divided into several sections:

- Company Information:** Fields for Company Name, Address, 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 specifying the pay period.
- Timesheet Table:** A table with columns for Date, Day, Job Description, Time In, Time Out, and Hours. The table is currently empty.
- Notes or Comments:** A text area for optional notes.
- Total Hours, Wage Rate, Earned Wage:** Fields for calculating the total hours and wage.
- Signatures:** Fields for Employee Name, Supervisor Name, Employee Signature, and Supervisor Signature.

FEATURES



Employee Evaluation

These forms document employee performance levels and are an essential part of the feedback and review process. Each evaluation provides a snapshot in time, recording valuable measurements and work performance details. They are critical for the development of personnel and to communicate feedback and guidance.

MOBILE FORM BENEFITS

- ✓ Customizable performance measurements
- ✓ Easy-to-fill-out Likert scale, tied to points system
- ✓ Secure and confidential Cloud based storage
- ✓ Automatic calculations for fast and accurate scoring

CRITICAL INFORMATION

- ✓ Employee and reviewer information
- ✓ Performance measurements
- ✓ Ratings and scores
- ✓ Feedback notes
- ✓ Reviewer signature and date

The image shows a tablet displaying a mobile form titled "Employee Evaluation" from the "goformz" app. The form is organized into several sections:

- Employee Information:** Fields for Company Name, Address, Phone, Fax, Email, 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 multiple rows for performance metrics.
- Rating:** A Likert scale for each performance measure, with options: Poor, Fair, Average, Good, and Excellent.
- Notes:** A column for additional feedback notes.
- Reviewer Signature:** A section for the reviewer's signature and date.

The tablet's status bar at the top shows the time as 2:05 PM and battery level at 54%.

FEATURES



Expense Report

These forms track work-related expenses that employees submit for reimbursement. They typically require including proof of purchase, like receipts. Traditional paper expense reports can quickly turn into a disorganized pile of stapled slips of papers that are tedious to compile and review. These reports streamline & optimize the process.

MOBILE FORM BENEFITS

- ✓ Directly include images of receipts on form (no need to track paper receipts)
- ✓ Automatic and accurate totals
- ✓ Instantly submitted for approval upon completion

CRITICAL INFORMATION

- ✓ Employee information and details
- ✓ Company expense policy
- ✓ Notes related to itemized expenses
- ✓ Expense item details (date, description, type, and totals)
- ✓ Proof of purchase

The image shows a tablet displaying the goformz Expense Report form. The form is titled 'Expense Report' and includes the goformz logo. It has several sections: 'Company Name', 'Address', 'Phone', 'Fax', 'Email', 'EMPLOYEE INFORMATION' (First Name, Last Name, Employee ID Number, Title, Department), 'COMPANY EXPENSE POLICY', 'PURPOSE FOR EXPENSES (NOTES)', 'PAY PERIOD DATES' (Pay Period Start, Pay Period End, Quarter), and a table for itemized expenses. The table has columns for DATE, ACCOUNT, DESCRIPTION, TRANSPORT, LODGING, MEALS, OTHER, and TOTAL. At the bottom right, there is a 'TOTAL:' field. A small note at the bottom left says '(Receipt Images Next Page)'. The tablet's status bar at the top shows the time as 2:05 PM and battery level at 54%.

FEATURES



Jobsite Inspection

Inspection forms are used to evaluate work areas. These visual examinations assess, identify and record conditions to maintain a safe working environment. Mobile forms ensure that this process is both accurate and thorough, and empower inspectors to complete the forms in a timely and efficient manner.

The image shows a tablet displaying the 'goformz' Jobsite Inspection form. The form is titled 'Jobsite Inspection' and includes the following sections:

- Company Information:** Fields for Company Name, Address, Phone, Fax, and Email.
- INSPECTION SITE INFO:** Fields for Inspected by, Inspection Date, Site Location or Address, and Job Number / Name.
- INSPECTION DETAILS:** A table with columns for Item, Status, and Images & Descriptions. The table has 10 rows. A legend indicates 'RA = Requires Attention'.
- INSPECTION NOTES:** A large text area for notes, with an 'Optional' label.
- Signature and Date:** Fields for the inspector's signature and the date.

MOBILE FORM BENEFITS

- ✓ Easily include images in the form (using mobile device's camera)
- ✓ Augment images with easy-to-fill-in text boxes for greater detail
- ✓ Instantly submits the form to appropriate personnel for expedited processing

CRITICAL INFORMATION

- ✓ Inspection site/object information
- ✓ Inspector details
- ✓ Images and descriptions
- ✓ Overall notes section
- ✓ Inspector signature and date

FEATURES



Invoice

These forms are used to bill customers for services performed and products sold, itemizing key details. Mobile forms accelerate processing times, accurately calculate totals and clearly communicate line items. Use these forms to increase payment cycles, modernize the billing process and improve record keeping.

MOBILE FORM BENEFITS

- ✓ Instantly sent to customer when project is complete
- ✓ Generates accurate totals
- ✓ Automatically saves a copy of the invoice for record keeping

CRITICAL INFORMATION

- ✓ Customer information and details
- ✓ Job or project specifics
- ✓ Description and details of work completed and products sold
- ✓ Itemized costs and line items
- ✓ Payment terms and conditions
- ✓ Total amount due

The image shows a tablet displaying a mobile invoice form. The form is titled "Invoice" and features the "goformz" logo. It includes sections for "WORK BILLED TO" (Company Name, Address, Phone, Fax, Email) and "JOB DETAILS" (First Name, Last Name, Sales Rep Name, Work Order #, Address, Job Start Date, Job End Date, City, State, Zip Code). Below these is a large text area for "Description of work completed". A table with columns "DATE", "DESCRIPTION", "RATE", "HOURS", and "TOTAL" is provided for itemizing work. The bottom section includes "Payment Terms", "Sub Total", "Other Fees", "Taxes", and "Total Amount Due". The tablet's status bar at the top shows the time as 2:03 PM and battery level at 55%.

FEATURES



Release Form

Release forms document agreements and permissions for an activity between two parties. For example, photographers use them to document permissions to use images of their models (to share and sell photos of them, etc). Be more thorough and organized by using mobile forms for these contracts.

MOBILE FORM BENEFITS

- ✓ Accessible on any mobile device
- ✓ Uses device's camera to quickly add image of participant directly on form
- ✓ Signature of participant captured instantly
- ✓ Stored in Cloud for later retrieval

CRITICAL INFORMATION

- ✓ Participant information (Signee)
- ✓ Participant photo
- ✓ Participant signature
- ✓ Terms of release
- ✓ Parent/Guardian information & signature (if participant is not yet 18 years old)

FEATURES



Conclusion

Digitizing a form unlocks a whole new level of functionality that can transform the way your business functions. Forms on mobile devices can be powerful tools. The 9 forms represented in this eBook play vital roles across various business scenarios. These forms only scratch at the surface of what you can expect once you implement mobile forms. We hope they inspire you to explore the benefits of what mobile forms can bring to your organization.

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



Mobile Forms

Just upload your current forms and we mobilize them to work on any iOS or Android device.



Electronic Data

No more digging thru archives —get full access to all of the data you capture on every mobile form.



Reports

Monitor your operations and analyze your business with easy-to-use online reports in GoFormz.



Collaboration

Workflow and notifications keep everyone informed and ensure procedures are followed.



Workflow

Accelerate the flow of information and automate steps in your workflow.



Integrate

Use the GoFormz API to integrate data with your other business systems in real time.

Thank You

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



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