



eBook

Guide to Building Great Mobile Forms with 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 _____

The image shows a tablet displaying the same "Sales Form" as the desktop version. The form is adapted for a smaller screen, with fields for "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", and "Signature". The GoFormz logo is visible in the top left corner of the tablet screen.

www.goformz.com

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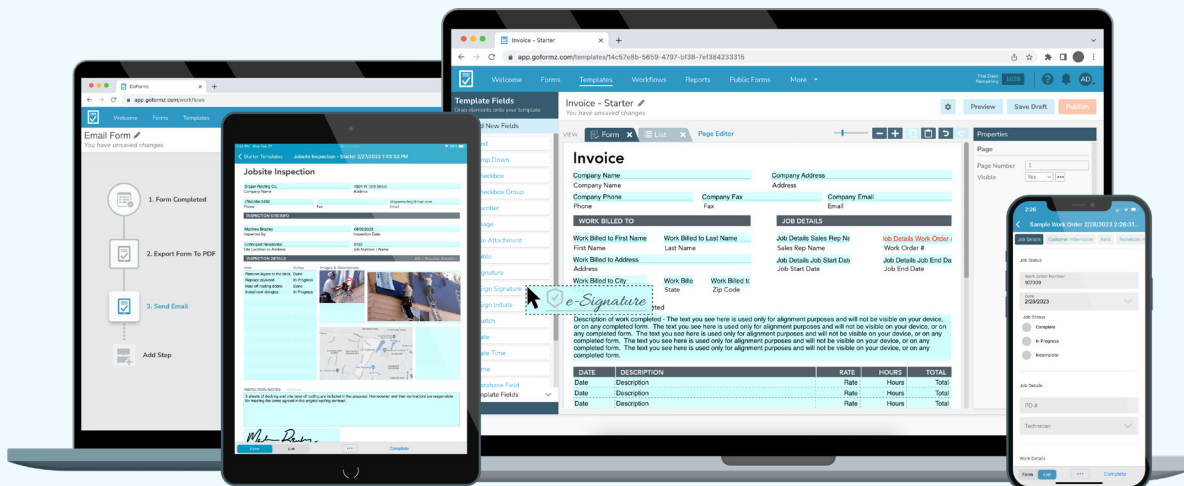
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Introduction

Welcome to the ultimate guide to building great mobile forms with GoFormz! In an increasingly mobile-driven world, creating effective and user-friendly digital forms for smartphones and tablets is essential for any business. Whether you find yourself documenting work on a job site, facilitating a classroom activity, or even just simply working from your car, how you interact with mobile forms on your device can significantly impact your overall experience.

Mobile forms can range from simple contact forms and [sign-in sheets](#) to complex permits and lengthy contracts. Regardless of their complexity, the success of these documents hinges on the set up of your digital forms design and functionality.

In this eBook, we'll delve into how to craft exceptional mobile forms, including best practices, feature and functionality considerations, and helpful resources you can leverage to facilitate your transition to digital forms and data collection. Whether you're well-versed in digital forms or seeking to modernize your outdated processes, this guide will empower you with the tools necessary to build mobile forms that not only enable your users to gather data efficiently, but also seamlessly deliver that information wherever it needs to go. By the end of this eBook, you'll be ready to craft mobile forms that excel in today's mobile-first world. Let's get started!



Build a Mobile Form in Three Easy Steps

The image shows a tablet displaying a mobile form titled "Order Form" with the goformz logo at the top left. The form is divided into two main sections: "ORDER DETAILS" and "BILLING INFORMATION".

ORDER DETAILS

Order No. [input]
Order Date [input]

BILLING INFORMATION

Bill to: Name/Company [input]
Bill to: Address [input]

Description	Quantity	Unit Price	Unit Total
[input]	[input]	[input]	[input]
[input]	[input]	[input]	[input]
[input]	[input]	[input]	[input]
[input]	[input]	[input]	[input]

Discount Rate [input] Subtotal [input]
Tax Rate [input] Discount [input]
 Tax [input]
 Grand Total [input]

Additional Comments or Instructions [input]

Name (Print) [input] Signature [input] Date & Time [input]

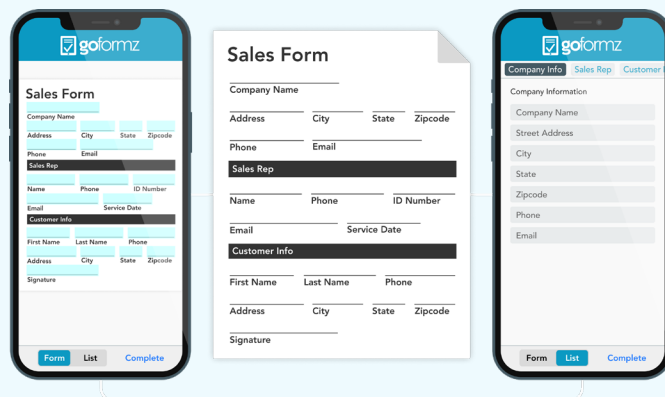
Step 1: Upload an Existing Form or Start From Scratch

Step 2: Add Fields to Your Template and Customize Them

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Step 1: Upload an Existing Form or Start From Scratch

Creating user-friendly mobile forms is a straightforward process, requiring just a few simple steps. If you already have a form that you'd like to use, you can effortlessly upload it to the GoFormz platform and make edits within our *Template Editor*, accessible under *Form View*. Alternatively, if you wish to build a form from scratch, you can do so using our *Template Editor* in *List View*.



What is the difference between Form View and List View?

Form View offers an interface that looks just like your original form, ensuring a seamless experience for users. *List View* is an additional, optional viewing mode that presents an app-like index of form fields, simplifying the process of completing forms on smaller mobile devices and screens. If both views are configured for your form, you can easily switch between *Form* and *List View* as needed within the mobile app.

Upload an Existing Form

1. Log in to GoFormz from a computer.
2. Navigate to the 'Templates' tab and choose 'Build' (located in the upper right-hand corner).
3. When asked if you have an existing form to upload, select the following option, 'Yes: Upload my PDF'.
4. When prompted, upload the PDF file of your existing form. Your uploaded form will then load in the *Template Editor*.

Build a Form From Scratch

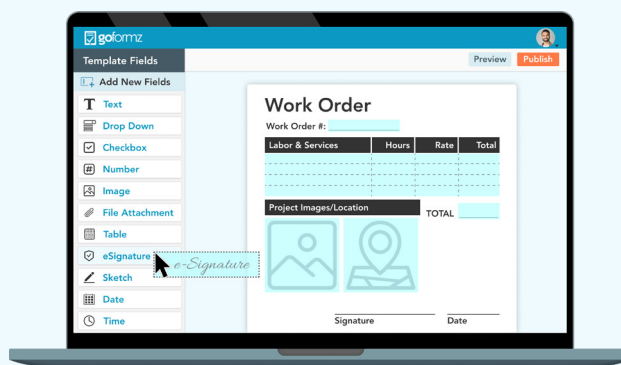
1. Log in to GoFormz on your desktop.
2. Navigate to the 'Templates' tab and choose 'Build' (located in the upper right-hand corner).
3. When asked if you have an existing form to upload, select 'No: Start from scratch'.
4. You will be directed to the *List View* builder within the *Template Editor*, where you will add fields to your *Template* in a list-like structure.

Step 2: Add Fields to Your Template and Customize Them

Now it's time to add form fields to your *Template* and tailor them precisely to your business requirements. For both *Form View* and *List View*, the process of adding a form field is simple.

To add a field to your *Template*:

1. Navigate to the *Template Fields* section, to the left of your uploaded form. Under 'Add New Fields', locate the field you would like to add (e.g. *Text*, *Signature*, or *Image*) and drag it onto your newly digitized form.
2. Adjust the size and location of your field using your cursor.



To customize the properties of a field on your *Template*:

The *Properties Panel* provides you with the capability to modify the basic properties of each form field, such as specifying whether the field should be required or hidden, adjusting the color of specific fields, incorporating *Conditional Logic*, and even enabling *Calculations* to enhance the customization of your form. To adjust these properties, do the following:

1. With your field selected, navigate to the *Properties Panel* (to the right of your uploaded form). In the 'Name' property, add a name for your field – this will help keep your form fields organized so you can easily locate, edit, and report on specific fields.
2. Now, customize your field's formatting properties.
3. Next, add logic and requirements to your field.

To learn more about customizing your field's formatting, logic, or requirements, [check out this article](#).

ProTip: Establish a consistent naming convention for your fields. Field names are used not only within the *Template Editor* but also throughout GoFormz features and tools, including *Reports* and *Workflows*.

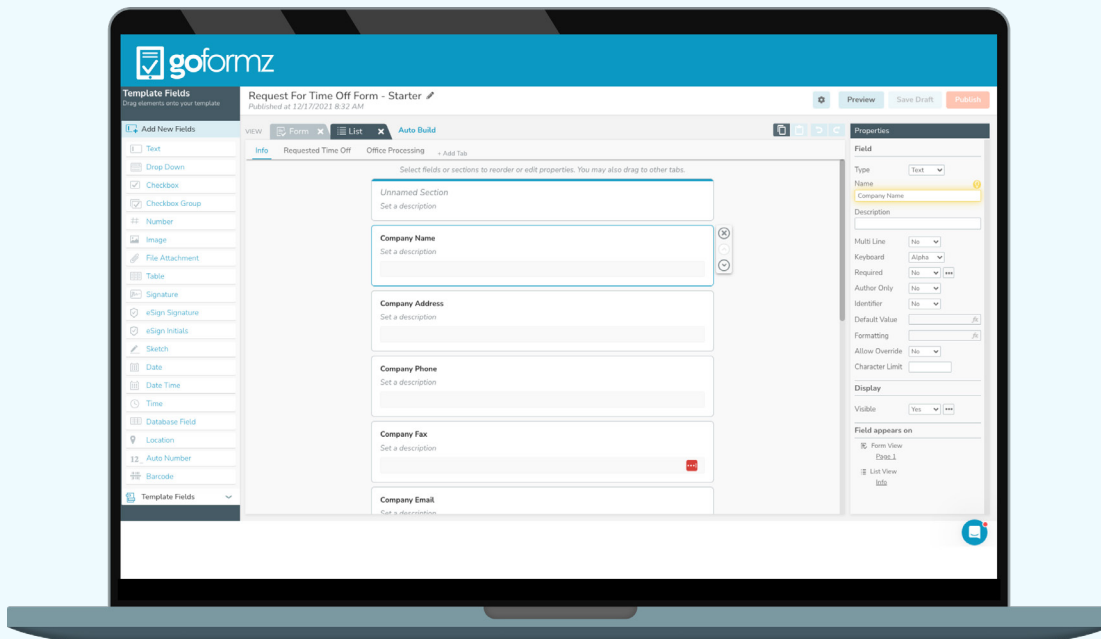
To delete a field from your *Template*:

If you wish to only delete the field from being visible on your *Template*, simply select the field on your *Template* and click 'delete'. To delete a field from your *Template* entirely, navigate to the 'Template Fields' section, in the lower, left-hand corner of the *Template Editor*. Here you can select a field name and hit 'delete' on your keyboard to completely delete the field.

When working in *List View*:

When working in *List View*, you will follow the same instructions listed above, however you will be adding fields to a 'List-Like' *Template*, arranged in a single column down the page.

In *List View*, you will have the option to organize your fields within Tabs and Sections. You can create Tabs for categorizing specific information, such as Company Info and Participant Info. Adding a Tab is a straightforward process. Just locate the 'Add Tab' button positioned at the top of your screen beneath the *List View* module.



Step 3: Save, Publish, and Test Your Template

The final step is to save, publish, and test your form *Template*. After you've finished building your form, click 'Save' in the upper right-hand corner of your screen.

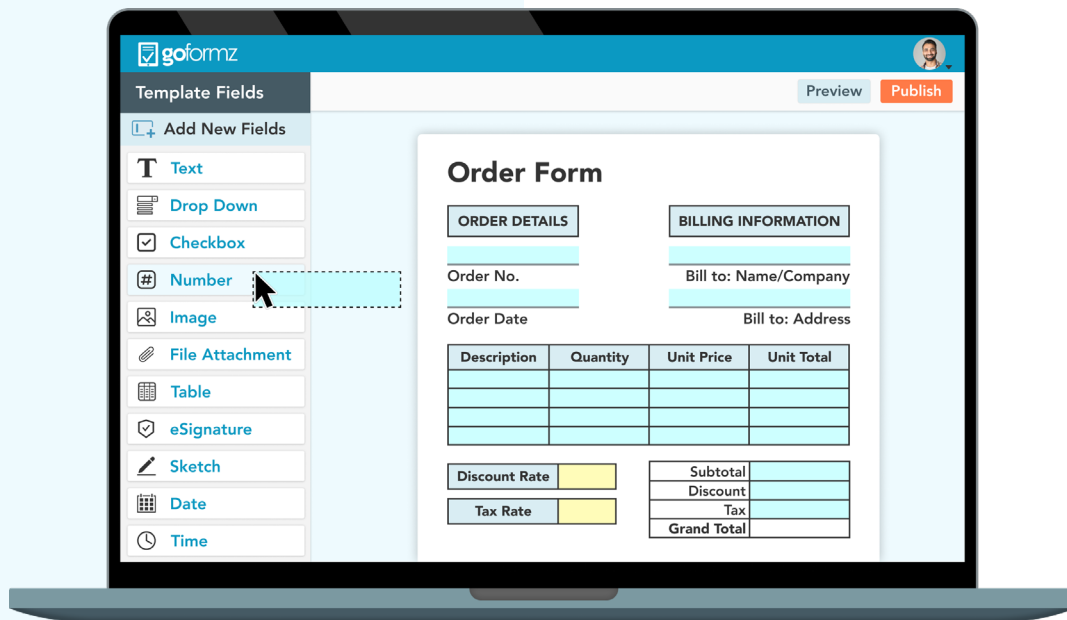
Next, select 'Preview' - in this mode, you can test your form fields to make sure they look and behave the way you need. For instance, you can test a calculation or a *Required* field. When ready, choose 'Test Complete' and 'Close Preview'.

If you are satisfied with your *Template*, you can then click 'Publish.' You can now use your *Template* to generate and fill out forms on your mobile devices or online.

The screenshot displays the GoFormz software interface for editing a form titled "Technician Timesheet". The interface includes a top navigation bar with options like "Welcome", "Forms", "Templates", "Workflow", "Reports", "Public Forms", and "More". A "Preview" button is highlighted with a red box. The main area shows the form layout with fields for "Company Name", "Company Address", "Employee First Name", "Employee Last Name", "Pay Period Start Date", and "Pay Period End Date". Below these fields is a table for recording time, with columns for "Date", "Day", "Job Description", "Time In", "Time Out", and "Hours". The "Properties" panel on the right shows settings for the selected field, such as "Type", "Name", "Description", "Multi Line", "Keyboard", "Required", "Author Only", "Identifier", "Default Value", "Formatting", "Allow Override", "Character Limit", "Align", "Font", "Size", "Color", "Background", "Focus Color", and "Left".

ProTip - Understanding *Template Versioning*: With *Template Versioning*, you can easily access earlier versions of your *Template* and seamlessly deploy new versions of your *Template*, when needed. To learn more, [check out this support article](#).

Best Practices for Form Building



Tip #1: Maintain the Original Formatting of Your Document

Tip #2: Envision Your Entire Data Collection Workflow

Tip #3: Make Your Form Intuitive and Interactive

Tip #4: Automate Communication and Collaboration

Tip #5: Connect Your Forms to Your Tech Stack

Tip #1: Maintain the Original Formatting of Your Document

Transitioning from paper-based processes to digital ones can be a daunting task for any organization. However, using mobile forms that closely resemble the familiar paper documents your team has been accustomed to can significantly ease this transition.

By preserving the same look and feel as your original forms, GoFormz mobile forms ensure minimal disruption to your established business workflows. This familiarity reduces the need for extensive training, therefore keeping the costs of user adoption to a minimum. After all, the primary goal of digitizing your forms is to enhance your existing workflows rather than causing any disruptions.

The image shows two versions of an 'Order Form'. On the left is a paper-based form with a clean, professional layout. On the right is a digital version displayed on a tablet, which replicates the paper form's layout and styling, including the GoFormz logo at the top. Both forms feature sections for 'ORDER DETAILS' and 'BILLING INFORMATION', a table for item descriptions, and a summary section for totals.

Description	Quantity	Unit Price	Unit Total

Discount Rate		Subtotal	
Tax Rate		Discount	
		Tax	
		Grand Total	

“What I like most about GoFormz is that we could make our form look exactly like the pen and paper documents we have been using for the last 15 years.” - Operations & Scheduling Coordinator, DiCAN, Inc.

Tip #2: Envision Your Entire Data Collection Workflow

Before you actually start collecting data, it's essential to take a step back and contemplate the objectives your forms need to achieve. Reflect on your desired outcomes with digital forms. Are you aiming for a smooth [patient intake process](#), or are you seeking comprehensive data on job site hazards? This change in perspective will determine the fields, features, and functionalities that should be incorporated into your digital forms.

Ensure that you assess your current procedures. What is lacking in your existing data capture workflow? Are there specific data points you wish to capture that you currently aren't? Do you need to introduce additional steps into your workflow? Identifying areas with data gaps will guide you in creating intuitive and efficient workflows that enable thorough data capture from the outset of your digital transformation journey.

Next, consider how the forms will be completed. Will your team primarily fill out forms on desktops or on mobile devices like phones or tablets? Will there be forms that require input from third-party contributors? Digital forms are adaptable and dynamic tools that can be customized to suit your business's unique requirements. This means your digital forms can be configured to:

- » Offer additional viewing modes, allowing for easy switching between different views.
 - » Be shared with external contributors such as patients, clients, and partners.
 - » Be dynamic and interactive, displaying only the fields relevant to a particular user, thus enhancing user experience.
- ...and so much more!

By carefully planning your entire data capture process from beginning to end, your operation will establish an effective method for gathering and analyzing data right from the outset.

"You can see who owns each form and what forms are being completed – GoFormz's organizational system has helped our admins tremendously." - Project Coordinator, Barricades Unlimited

Tip #3: Make Your Form Intuitive and Interactive

One of the key advantages of utilizing mobile forms for data collection lies in the ability to dynamically customize form fields according to each user's particular requirements. This can be achieved through *Automatic Calculations*, *Dynamic Field Properties*, and *Conditional Logic*.

Automatic Calculations

Configure your form to instantly complete calculations, eliminating the need for manual math. *Calculations* are capable of performing basic math formulas, such as multiplying values or calculating totals, as well as more complex calculations, like those required in weekly employee timesheets or when estimating intricate project costs. By automating calculations, you not only save valuable time but also reduce the potential for human errors when recording numerical data. [How to Use Calculations In Your Digital Form Template' eBook >](#)

Dynamic Field Properties

Make your form interactive and intuitive with *Dynamic Field Properties*. With *Dynamic Field Property*, you can dynamically alter the background color, visibility, and requirements of a field, ensuring vital information is collected before a form can be completed. This simple functionality effortlessly enforces business procedures and documentation requirements.

Conditional Logic

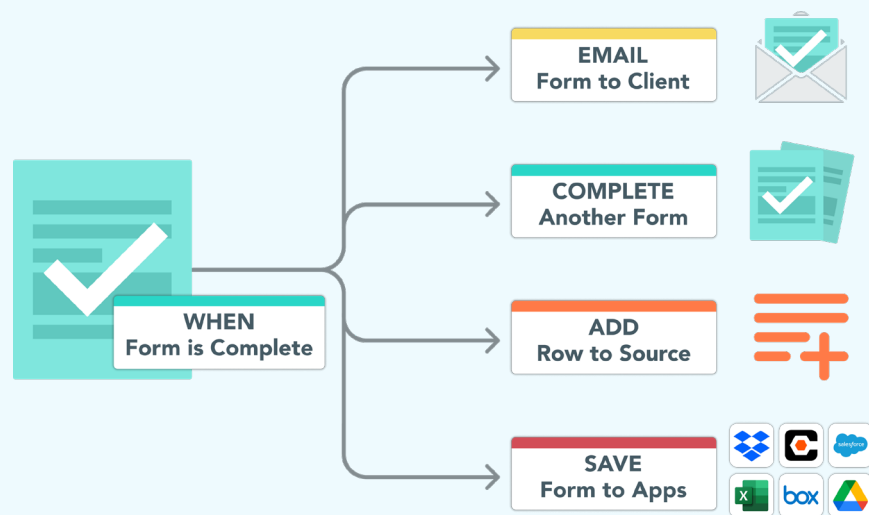
Conditional Logic empowers you to seamlessly guide user data entry, resulting in fewer hurdles and more precise information. In certain instances, incorporating *Conditional Logic* can even eliminate the need for numerous paper forms. This is achieved through the 'if/then' functionality of *Conditional Logic*, which can hide or emphasize different form fields based on predefined criteria.

For instance, when a user selects a specific *Checkbox*, an additional *Text* field can appear and be marked as required. This enables your forms to often adopt a one-size-fits-all approach, effectively eliminating the need to create multiple iterations of the same form, as they dynamically adapt to meet each user's needs. As a result, users are no longer required to complete fields that aren't relevant to them, expediting data capture, reducing redundancy, and enhancing accuracy.

Tip #4: Automate Communication and Collaboration

The process of handling forms can prove to be quite a cumbersome ordeal, fraught with the potential for human errors and frustrating delays. From the first stroke of a pen or a click of a keyboard, to the eventual submission of a form for processing, a document typically passes through the hands of multiple individuals, each interaction carrying the risk of introducing mistakes and adding to the already frustrating timeline.

To mitigate these challenges, *Automated Workflows* can be set up to instantly handle routine tasks, such as emailing a copy of the completed document to another user and an email input into the form itself or uploaded into cloud storage. In addition, forms can be automatically transferred to other users when additional input is required. For example, when a teammate completes a form, a workflow can automatically transfer it to another teammate, store it in GoFormz's secure Cloud database, and even email a copy to a customer simultaneously. [Read this support article to learn more about automating tasks with Workflows >](#)

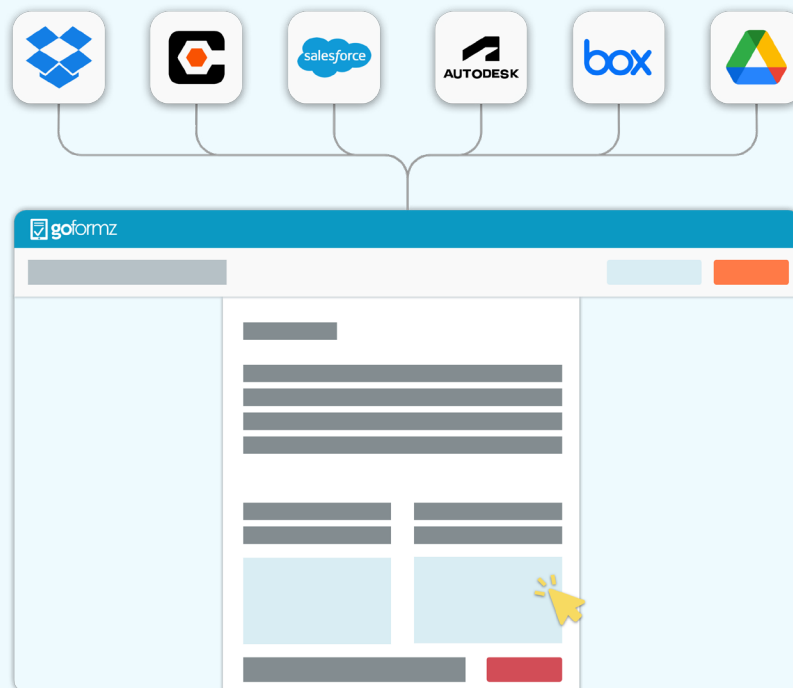


"Information would usually take about a week to get to us.... Now we can immediately help customers." - Office Manager, Kaw Valley Greenhouses

Tip #5: Connect Your Forms to Your Tech Stack

Integrate your GoFormz account seamlessly with your other essential business applications to ensure a seamless flow of form data throughout your systems. By establishing connections to your ERP, CRM, or other critical business solutions through your mobile forms platform, you can enhance your record-keeping processes, streamline mobile form field population with data from other systems, and facilitate the automation of data exchange.

At GoFormz, we offer a range of pre-configured integrations with popular applications and services, including Salesforce, Procore, Box, OneDrive, Acumatica, and more. Our commitment to innovation means that we are constantly expanding our list of partner integrations, but if you require a custom solution, our API is at your disposal for tailored integrations. [Learn more about our integration capabilities here >](#)



"The GoFormz-Acumatica integration has increased the communication between our office staff and our applicators in the field." - VP of Operations, Lake Restoration

Why Choose GoFormz?

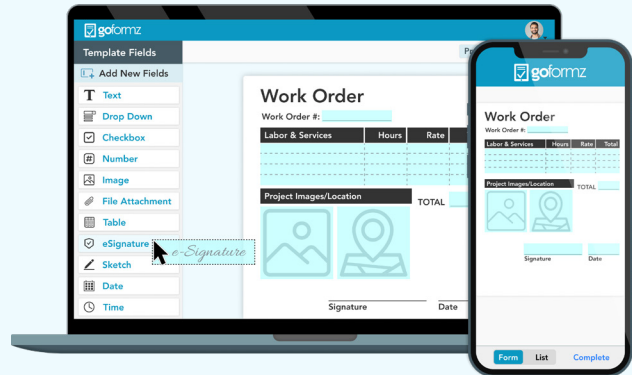
GoFormz is the only digital and mobile forms provider capable of preserving the original look and feel of existing paper forms or rigid PDFs, with the added functionality of an online form. This capability empowers your business to retain its branding, streamline user adoption, and adhere to specific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

Through the user-friendly, drag-and-drop form builder, GoFormz guarantees a streamlined form-building experience for all users, regardless of their technological proficiency (no coding skills required). This intuitive interface enables businesses to effortlessly create tailored mobile forms that precisely align with their distinct needs.

Mobile forms can be enhanced with a variety of data types, including *Barcodes*, *GPS*, *Sketches*, *Images*, *eSignatures*, *Instant Calculations*, and even user-friendly form *Logic*, enriching the process of data collection. GoFormz also offers an alternative mobile-friendly viewing mode known as *List View*, empowering form creators to design forms from scratch without the need for pre-existing templates.

Whether you're simply looking to transform into a mobile workforce or are interested in removing paper processes from your day-to-day operations, GoFormz can simplify your work life in numerous ways:

- » Removing barriers in data collection, resulting in significant time, cost, and resource savings
 - » Generating a continuous stream of accurate and dependable data across all interconnected systems
 - » Enhancing communication and collaboration among departments, remote facilities, and customers, leading to increased workplace productivity
 - » Streamlining formerly manual processes such as manual form delivery and data re-entry through robust automation capabilities
- ...and so much more!



Additional Resources

If you found this eBook helpful and are looking for additional resources to build and generate great mobile 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:

Additional Guides

- » [How to Build Great Digital and Online Forms](#)
- » [\[Guide\] Getting Started With Public Forms](#)
- » [Mobile Forms Buyer's Guide](#)
- » [The GoFormz Quickstart Guide](#)

Helpful Videos

- » [Mobile Forms Basics Video Tutorials](#)

Helpful Feature Best Practices

- » [ProTip: Show Or Hide Fields Based On Form Ownership](#)
- » [Automatically Add a Timestamp When an eSign Field Is Completed](#)
- » [ProTip: Instantly Email Completed Forms to Desired Recipients](#)
- » [ProTip: Using the Improved Sketch Field](#)
- » [ProTip: Best Practices for Using the AutoNumber Field](#)
- » [ProTip: Deciding When to Use the File Attachment Field](#)
- » [ProTip: Auto-Fill Form Fields with Database Information](#)
- » [ProTip: Optimizing Signature Fields](#)
- » [ProTip: Use Logic To Move Documents In A Process-Oriented Flow](#)
- » [Use Barcode Scanning In Your Digital Forms](#)