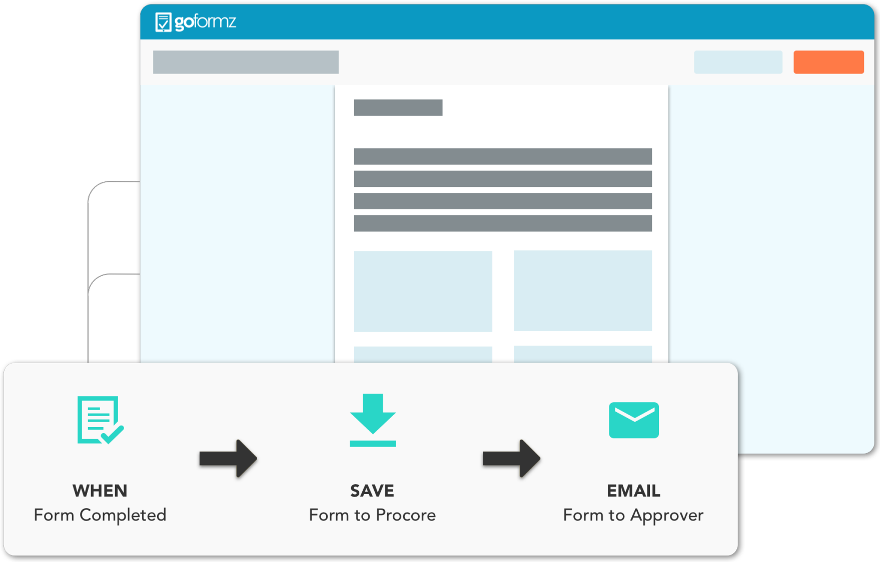
eBook

How To Use Basic Workflows

Understanding and implementing digital form automation



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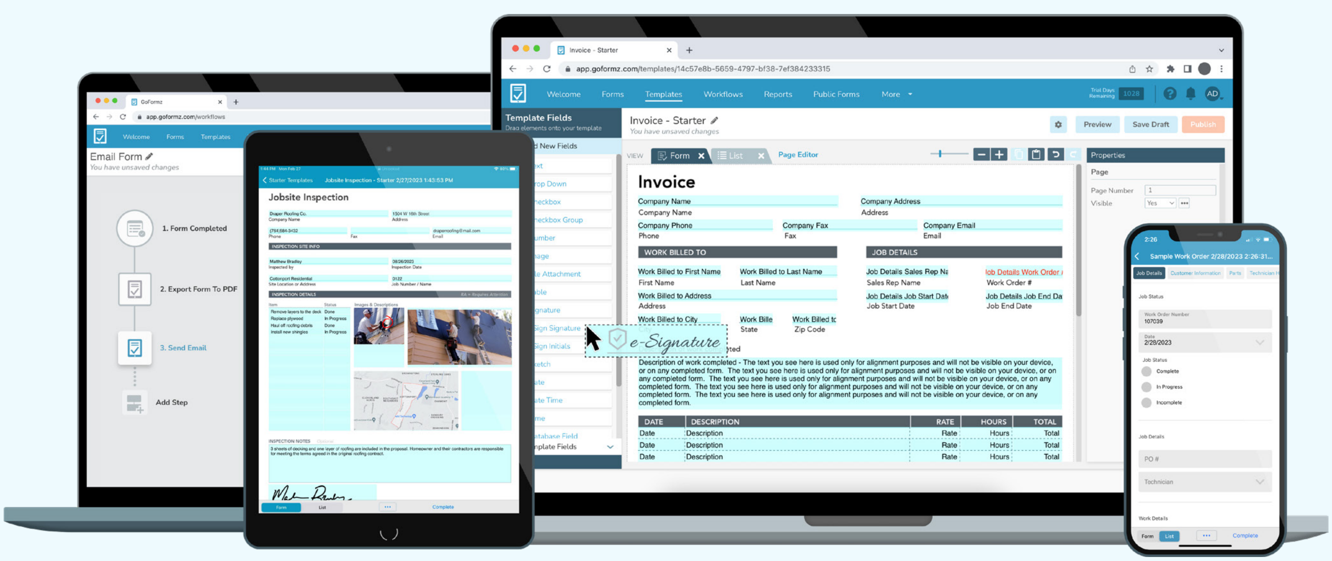
Introduction: The Power of Digital Forms and Automation

Digital forms have emerged as a critical resource in the modern workplace, revolutionizing everyday tasks and rapidly boosting productivity. Rather than slog through repetitive, manual tasks (like rekeying data or physical record-keeping) teams are turning to digital forms to accelerate and automate busywork, saving time and budget (and a few headaches along the way).

Paperwork is often more laborious than simply filling out a document. Printing demands, hand-delivery, snail mail, scanning forms, attaching photographs, rekeying documents, and filing records, generally accompany even the simplest paperwork – slowing daily processes and leaving far too much room for human error.

Automation further alleviates the burdens of paperwork. Automating even the simplest tasks, like emailing forms, can significantly accelerate your daily processes and grant your business more control over its data.

Using GoFormz, your digital forms can be easily equipped with automations using *Automated Workflows.*



What Are Automated Workflows?

Automated Workflows are used to automate manual tasks like uploading completed forms to Cloud storage applications and emailing copies of completed forms to colleagues, clients, and more – streamlining processes from end to end.

Think of *Automated Workflows* as the bridge between your captured form data and its intended destination. Digital forms act as a familiar frontend to your operation's data collection and *Workflows* are used to instantaneously send your completed documents and collected information, wherever it needs to go. These automated tasks save your team considerable time and reduce opportunities for delays, human error, and miscommunication.

Workflows can be fully customizable to match your unique business needs. GoFormz offers a variety of ready-to-use *Workflow* 'recipes' that you can rapidly deploy or you can build a Workflow entirely from scratch.

In this eBook, we'll explore what *Automated Workflows* are, the value they bring, and the most popular *Workflows* leveraged by our users today.

What Can Workflows Do for Your Business?

Say goodbye to mundane and time-consuming tasks, such as scanning, faxing, and uploading paper documents to existing tech stacks. *Automated Workflows* will revolutionize your business operations and drive productivity and efficiency across your entire organization.

By transitioning away from manual tasks, your team can unlock many benefits, including streamlined processes, eliminating opportunities for human error, and enhanced focus on business responsibilities. Imagine dispatching pre-filled forms to field workers seamlessly, emailing supervisors completed forms automatically, generating scheduled reports effortlessly, and securely storing forms in Cloud storage apps like Google Drive or Box. Embracing these automations empowers your organization to optimize productivity and efficiency, while freeing up valuable time for more significant tasks.

Getting Started with Automated Workflows

Elements of a Workflow

Before you get started, it's important to understand the key elements of a *Workflow*.

Triggers & Actions

Each *Workflow* contains a series of steps. These steps include a ***Trigger*** and one or more ***Actions***. A *Trigger* initiates a *Workflow* while *Actions* are every step in a *Workflow* that follows.

For example, if your *Workflow's Trigger* was a user completing a form, the following *Actions* could be exporting the form to a PDF and uploading a copy of that completed document to Cloud storage.

Recipes

A *Recipe* is a ready-to-use blueprint for your *Workflow*. *Recipes* provide the series of *Triggers* and *Actions* that your *Workflow* will follow, which you can easily customize to meet your unique *Workflow* needs.

For example, you can leverage a *Workflow Recipe* to automatically email a completed form to a contact. For this *Recipe*, you would customize the *Template* of the form you would like shared, the email of the recipient, and the content of your email.

GoFormz offers an array of pre-made *Recipes* you can use to rapidly configure a *Workflow* of your own.

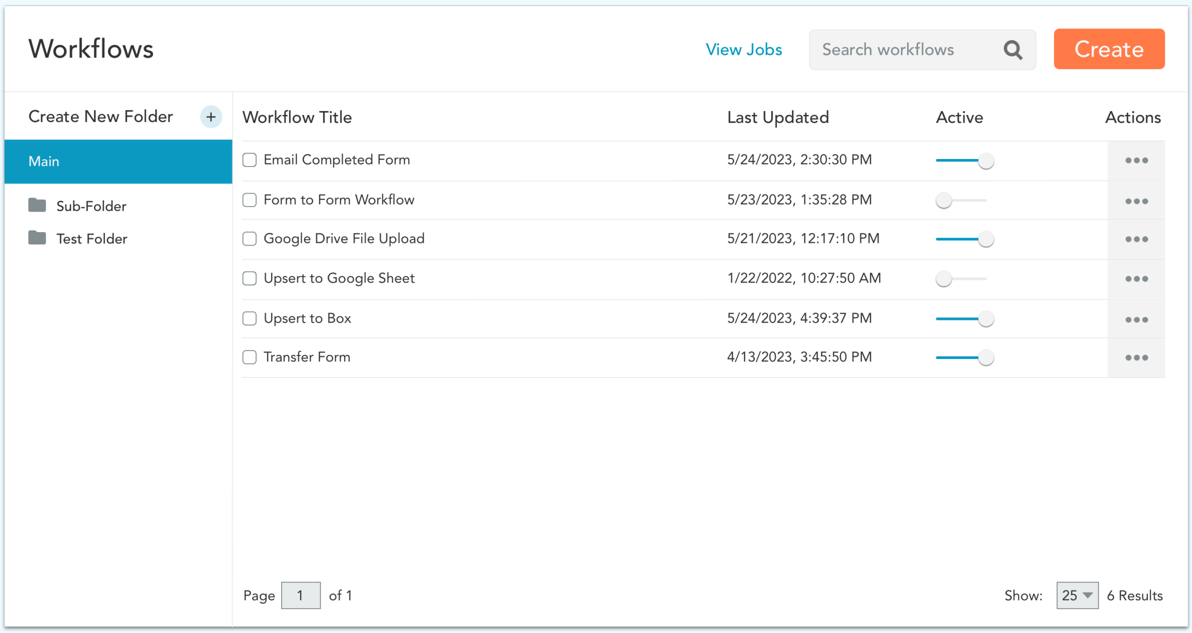
Email Completed Form

Automatically send a customized email with a PDF version of your completed form.

Google Drive File Upload

Upload completed Forms to your connected Google Drive account.

Where to Create and Manage Your Workflows



You create and manage *Automated Workflows* in the GoFormz web application. Log in to your account from a computer and select 'Workflows' from the menu bar.

On the left-hand side of your screen, you will see Workflow Folders. Here you can organize your *Workflows* within Sub Folders.

Select a folder to view your *Workflows*. Your *Workflows* will be listed at the center of your screen, including their Title, Last Update, Activation status, and Actions menu.

Here you can also view ***Workflow Jobs***, which lists each time a *Workflow* fires. The Actions column contains an ellipsis that opens to the Actions menu. Here, you can View Jobs, Edit, Clone, Move to Folder, or Delete. If you wish to turn a *Workflow* off, you can toggle the activation status of your *Workflow* to Inactive using the slider.

If you wish to see a specific *Workflow* and its steps, click on the title of the *Workflow* and it will open up the steps of that specific *Workflow*.

A *Workflow Job* is listed each time a *Workflow* runs. To view completed *Workflow Jobs*, select *View Jobs* on the right-hand side of your screen.

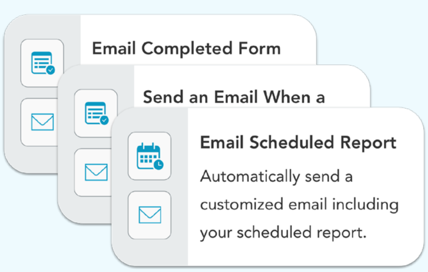
Finally, to create a *Workflow*, click the 'Create' button.

How to Create a New Workflow

Configuring a new *Workflow* is easy. To get started, navigate to the *'Workflows'* tab in GoFormz the GoFormz web application. Next:

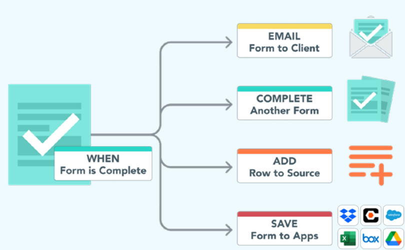
1. Select *'Workflows'* from the menu bar. Once you land in the Workflows tab, select 'Create' in the upper right-hand corner or 'Set Up Workflow' in the center of the screen.
2. The 'Workflow Recipe Library' will load. Your subscription tier will determine how many recipes are available for you to use. *Workflow Recipes* will be labeled with Team, Advanced, and Enterprise, based on availability.
3. Select which *Recipe* you would like to use to build your *Workflow*.
4. Customize the *Trigger* of your *Workflow*. Add in any necessary information needed, like a specific *Template* name or user *Group*.
5. Customize the *Action* of your *Workflow*. Add in any necessary information, like email details, Cloud storage folders, and more.
6. Click 'Save' in the upper right corner of the screen.
7. Toggle the 'Active' button to on for your *Workflow*.
8. Run a test and make sure your *Workflow* operates as expected.

1. Select Your Recipe



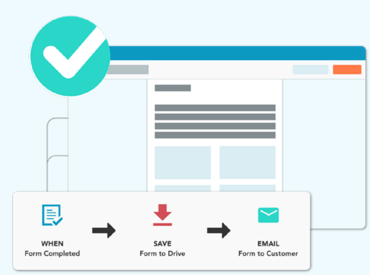
Select a Recipe you would like to use or build a custom Workflow from scratch.

2. Customize



Customize your Triggers and Actions to automate common tasks!

3. Test and Run

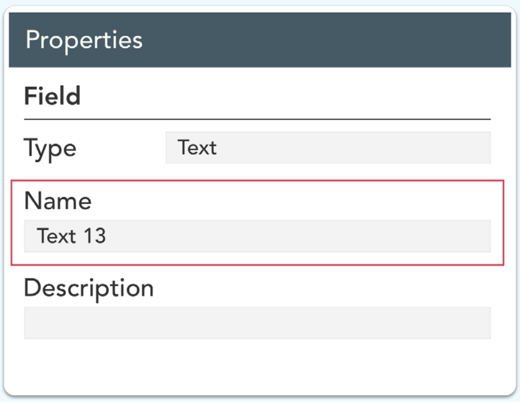


Toggle the 'Active' button to on and run a test to make sure the Workflow works accordingly.

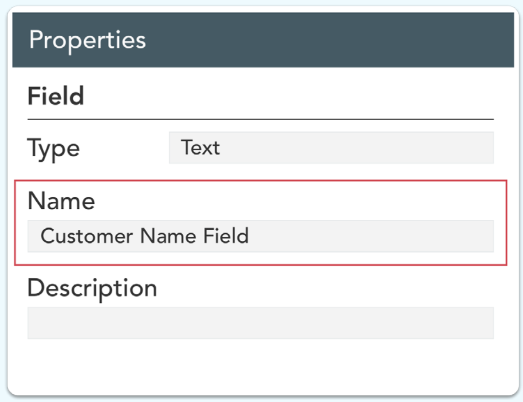
Best Practices For Building Workflows

When initially setting up a *Workflow*, it's important to remember some best practices to establish a great foundation for future *Workflow* builds:

» **Name your form fields:** While it may seem like a simple step, establishing a standardized naming convention for your form fields is often overlooked during the *Template*-building process. When form fields lack proper names, they are automatically assigned generic names like "Text 13," which can make it difficult for both form users and creators to remember the exact purpose of each field. This becomes particularly challenging when extracting or referencing information from specific fields within Workflows.

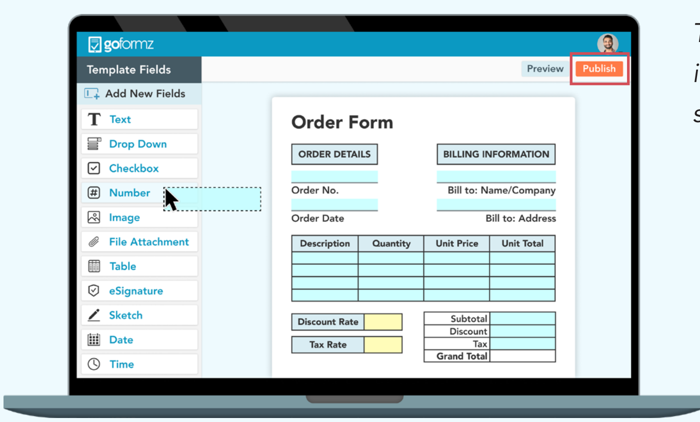


Auto-generated form field names



Form field name created by the form owner

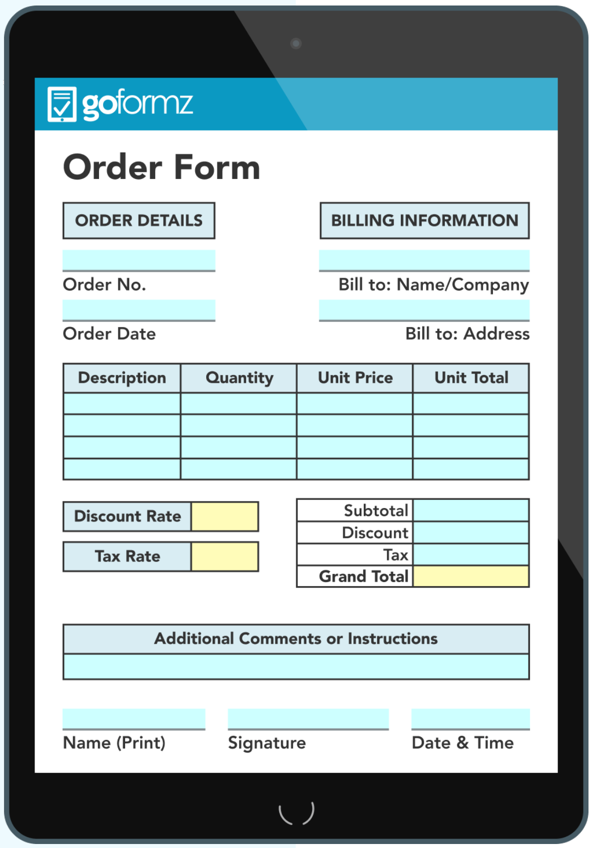
» **Save completed** ***Templates*****:** For a *Workflow* to run successfully, the form *Template* has to be saved and published. Without a published *Template*, there is no master document for the *Workflow* to operate on, resulting in the inability to execute the *Workflow*.



The 'Publish' a Template button is located in the upper-right hand corner of the screen in the Template-Builder.

Now let's explore four popular *Workflows* you can set up today!

Four Popular Use Case Examples



#1: Auto-Email Completed Forms

#2: Upload Form to Cloud Storage

#3: Auto-Populate Data From One Form to Another

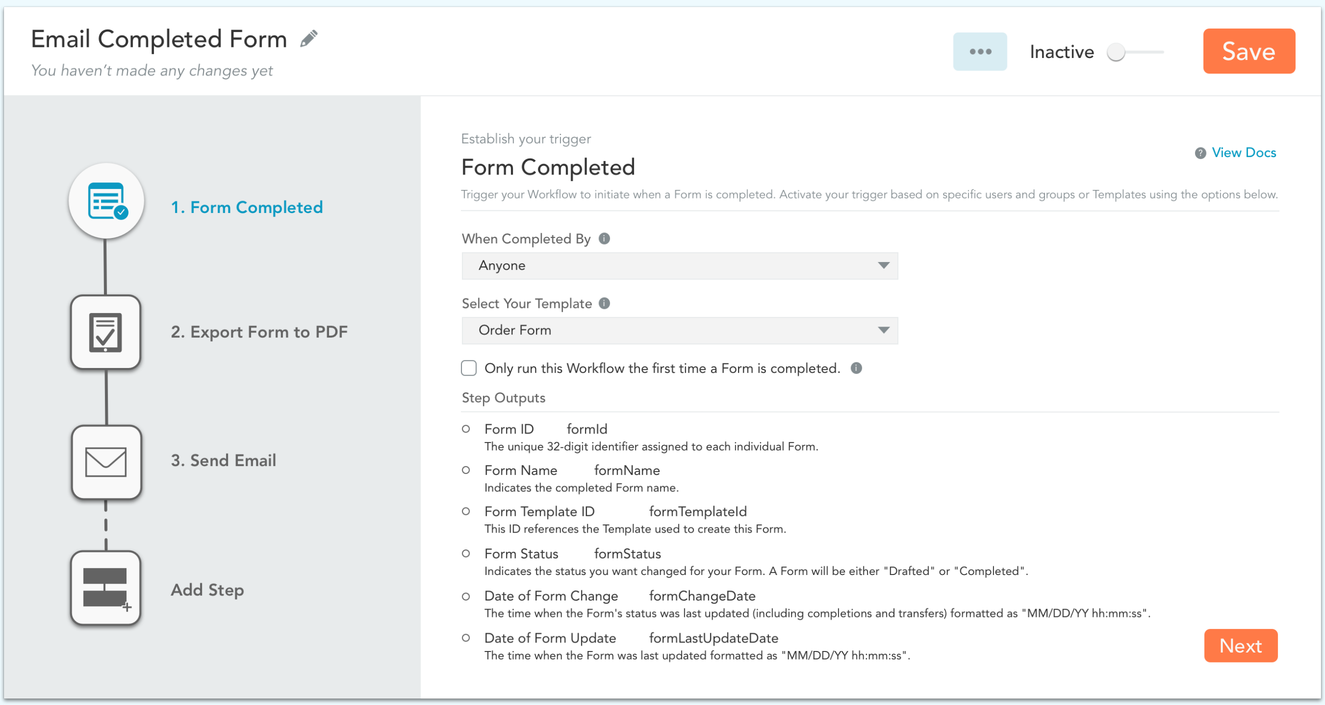
#4: Update Spreadsheets With Form Data

Workflow #1: Auto-Email Completed Forms

Available to all paid subscription tiers, this *Workflow Recipe* will instantly email a copy of a form to any contact as soon as a form is submitted.

To set up this *Workflow*, navigate to the 'Workflows' tab. Click 'Create'.

Within the Workflow Recipes Library, select the recipe titled 'Email Completed Form'.

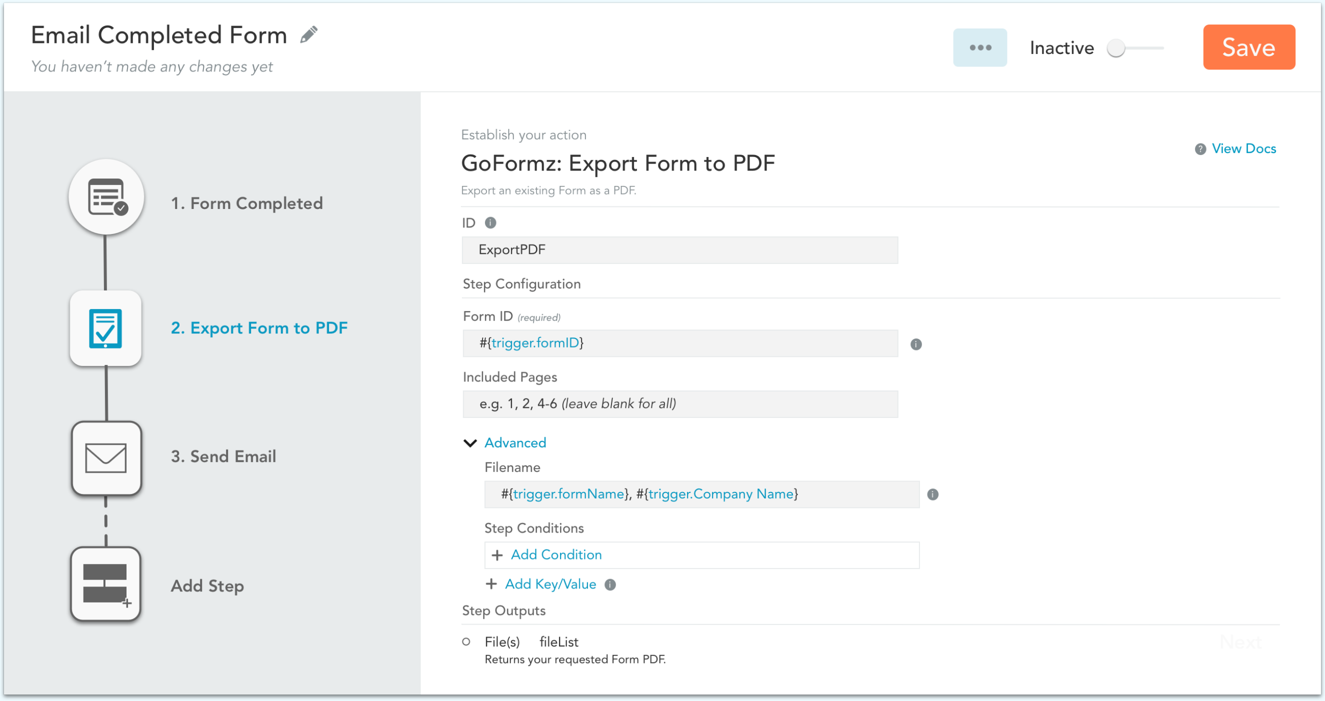


Next, you'll customize the Recipe's *Triggers* and *Actions*. First, you'll configure the *Workflow Triggers*. For this *Recipe*, your *Trigger* will be 'Form Completed'. You can customize which *Template* and users you would like the *Workflow* applied to. If no user or *Template* is specified, this *Trigger* will initiate whenever any form user completes any of your forms.

For this example, we will configure our *Workflow* to *Trigger* when **anyone** completes an **Order Form**.

Once these configurations are complete, click the 'Next' button located at the bottom right-hand side of the screen.

We have now reached the second step in our *Workflow*, titled 'Export Form to PDF'. Here, we will define our *Workflow Actions*.



For this example, there is no need to adjust the Form ID (a unique 32-digit identifier automatically assigned to each completed form) which the Workflow will automatically assign.

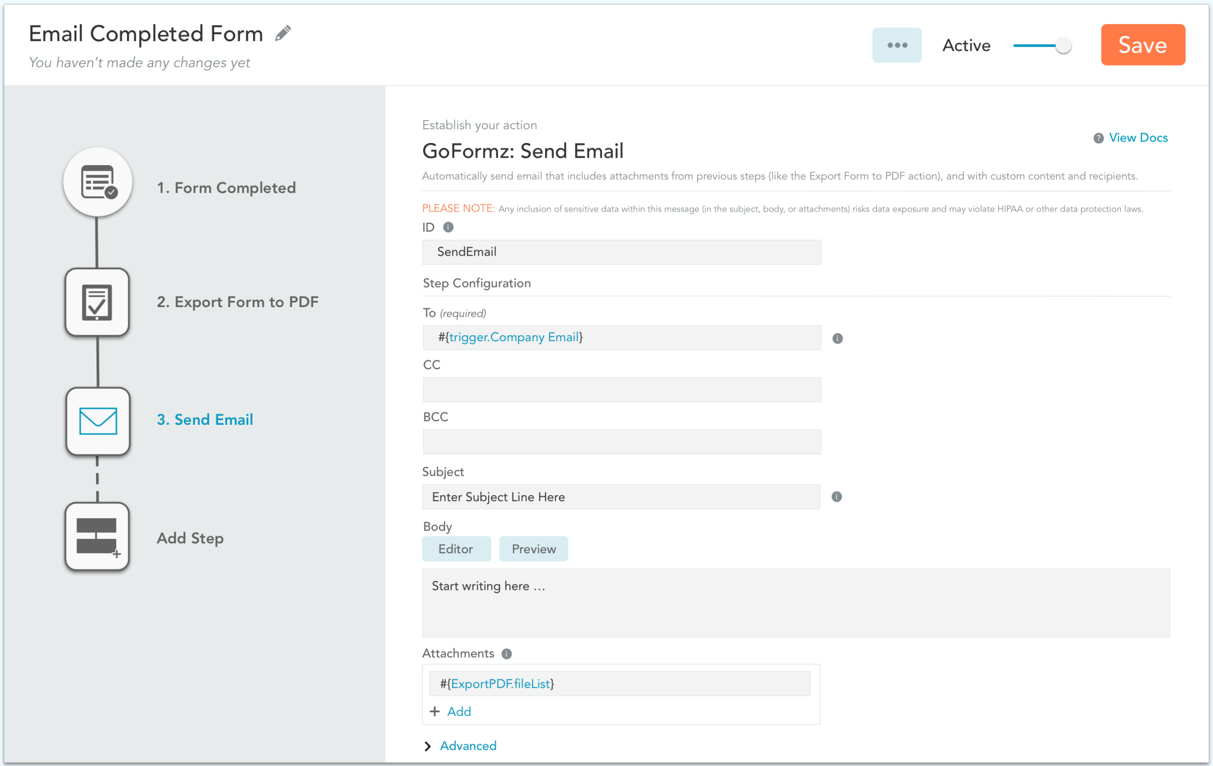
The first action we will configure is exporting the completed form. We will specify which pages of the form we want to export and share, in the 'Included Pages' field. In this example, we will export all pages of the Order Form, which means we will leave this field empty. However, if we wanted only the first page of our form exported, we would enter '1' into this field.

Lastly, in the Advanced section, we have the option to set our Filename. The Filename determines how the uploaded file will be named in our email. If you don't provide a specific filename, the form name will be used as the default.

For this example, we will specify what company the Order Form belongs to using the Default Value of the Form Name, adding a comma, and adding the additional Company Name trigger #{trigger.Company Name}.

Once we are satisfied with our first *Action*, click 'Send Email' on the left-hand side of the screen.

Now we will configure our final *Action*, emailing a copy of the exported form.



First, we will determine who will receive the email with the attached form. For this, there are two approaches you can take. You can designate a specific email address to receive the email and attached form. To do this, enter the desired email address in the 'To' section.

Alternatively, you can pull an email entered into the form to determine the recipient of the email. A great example of this use case would be auto-emailing a completed invoice to a client. For this example you would click on the 'To' section and select the trigger #{trigger. Company Email}. This will retrieve the email address associated with the "Company Email" field within our completed form and send the email accordingly.

In our Order Form example, we want to automatically email the fulfillment department, so we will enter that designated email address.

Once you have determined the recipient of the email, you can add a subject line and any desired body text for the email.

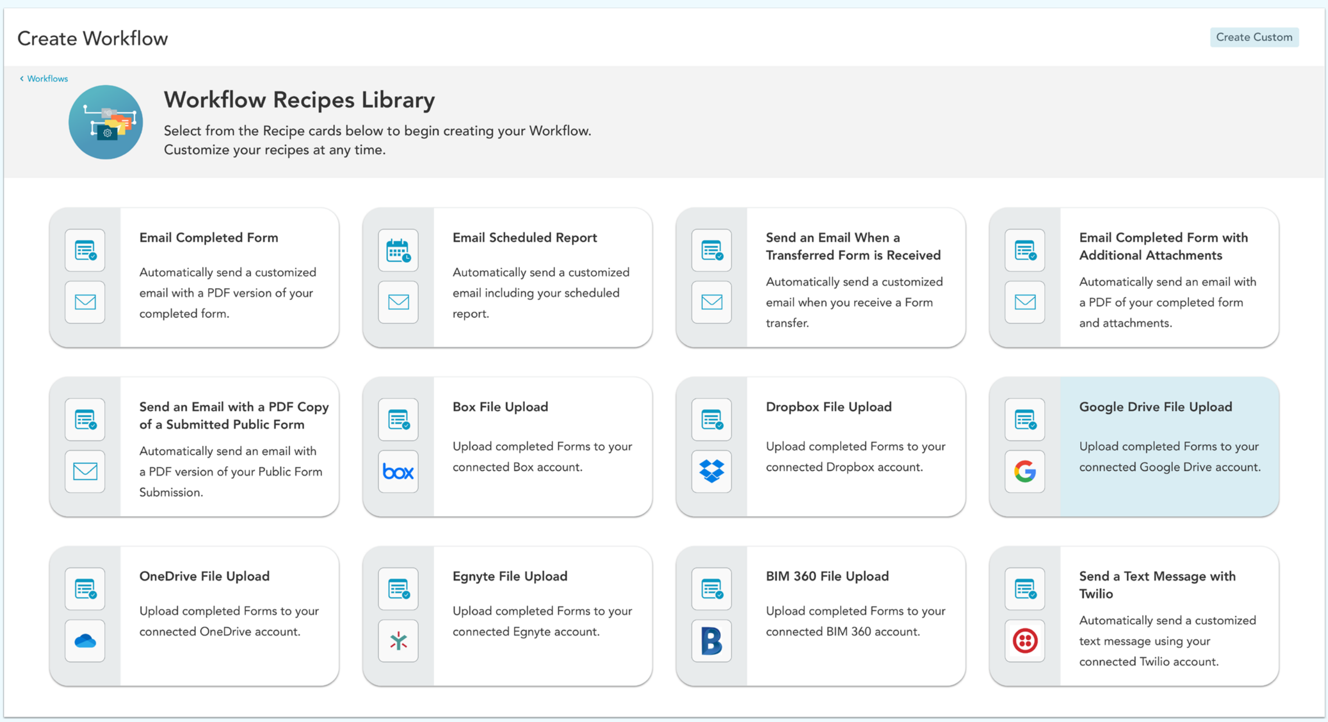
Once you have entered the necessary information, select 'Save'.

Now that you have successfully configured your *Workflow*, remember to toggle the 'Inactive' button to 'Active'. It's always recommended to run a test of your *Workflow* to ensure everything is functioning as expected. Once you have confirmed that the *Workflow* is operating according to your requirements, you have a fully functional Auto-Email *Workflow*.

Workflow #2: Upload Forms to Cloud Storage

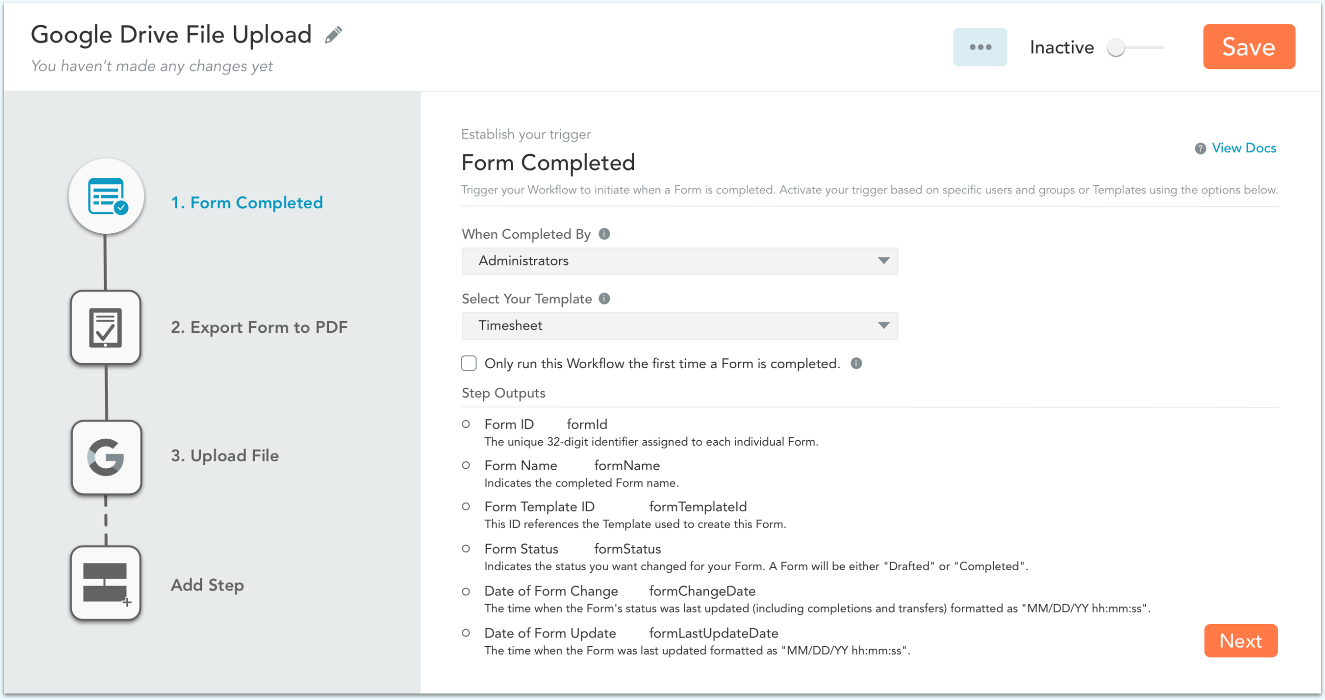
Automatically uploading a completed form to Cloud storage is a *Workflow Recipe* available to all paid subscription tiers.

In the 'Workflows' tab, click 'Create' to access the Workflow Recipes Library. Locate the *Recipe* that identifies your specific Cloud Storage File Upload. You should see the following available tile connections: Box, Dropbox, Google Drive, OneDrive, or Egnyte. For this example, we are going to use the Google Drive File Upload Recipe, but the steps are similar for any Cloud storage solution. Click the *Recipe* to proceed.



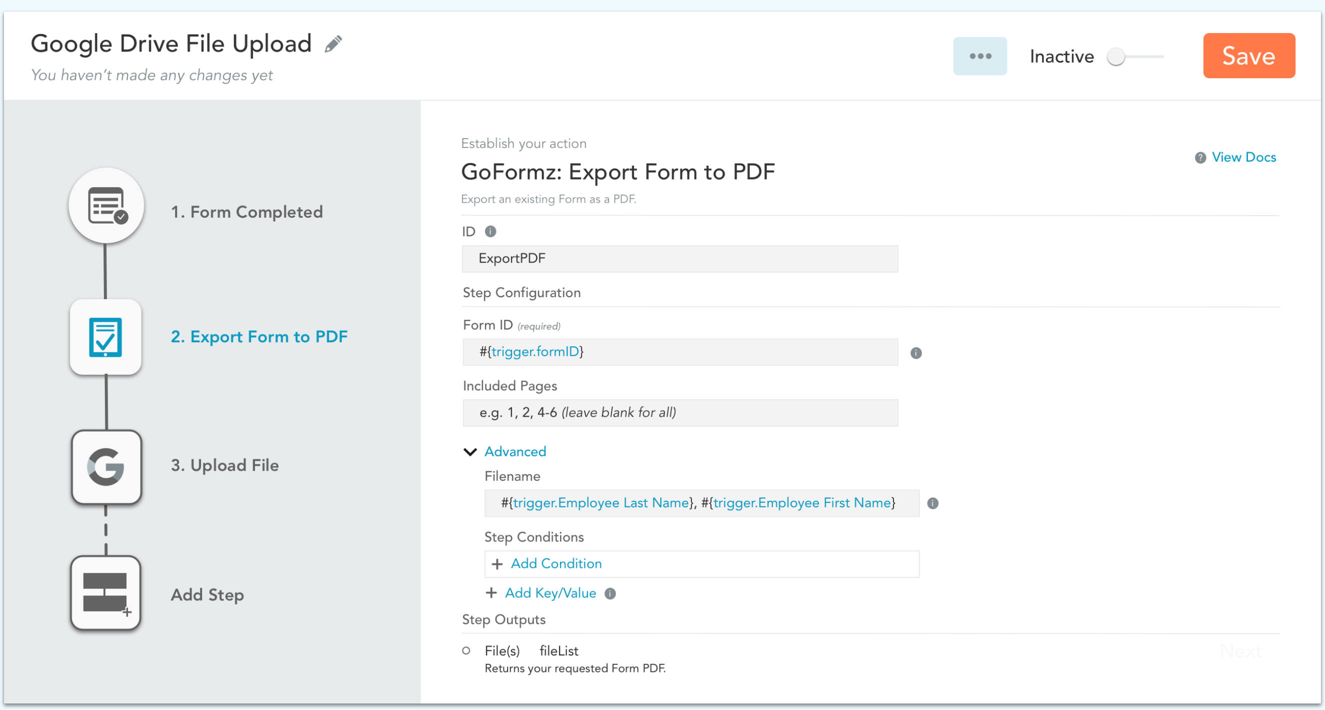
If you already set up an Auto-Email *Workflow* then this next step will look familiar. Now, we will set up our *Workflow Triggers*.

For this example, we are going to designate a specific *Group* and *Form* to our *Trigger*. Meaning, when a specific group of users complete a specific form, the *Workflow* will be activated. For this example, we will use the **Administrators Group** and a **Timesheet Template**. Click 'Next'.



Next, we will configure our *Workflow's Actions*, beginning with exporting the form PDF. In this instance, we want to include every page of the form in the exported PDF. The Form ID can be left the as the default value populated by the Recipe.

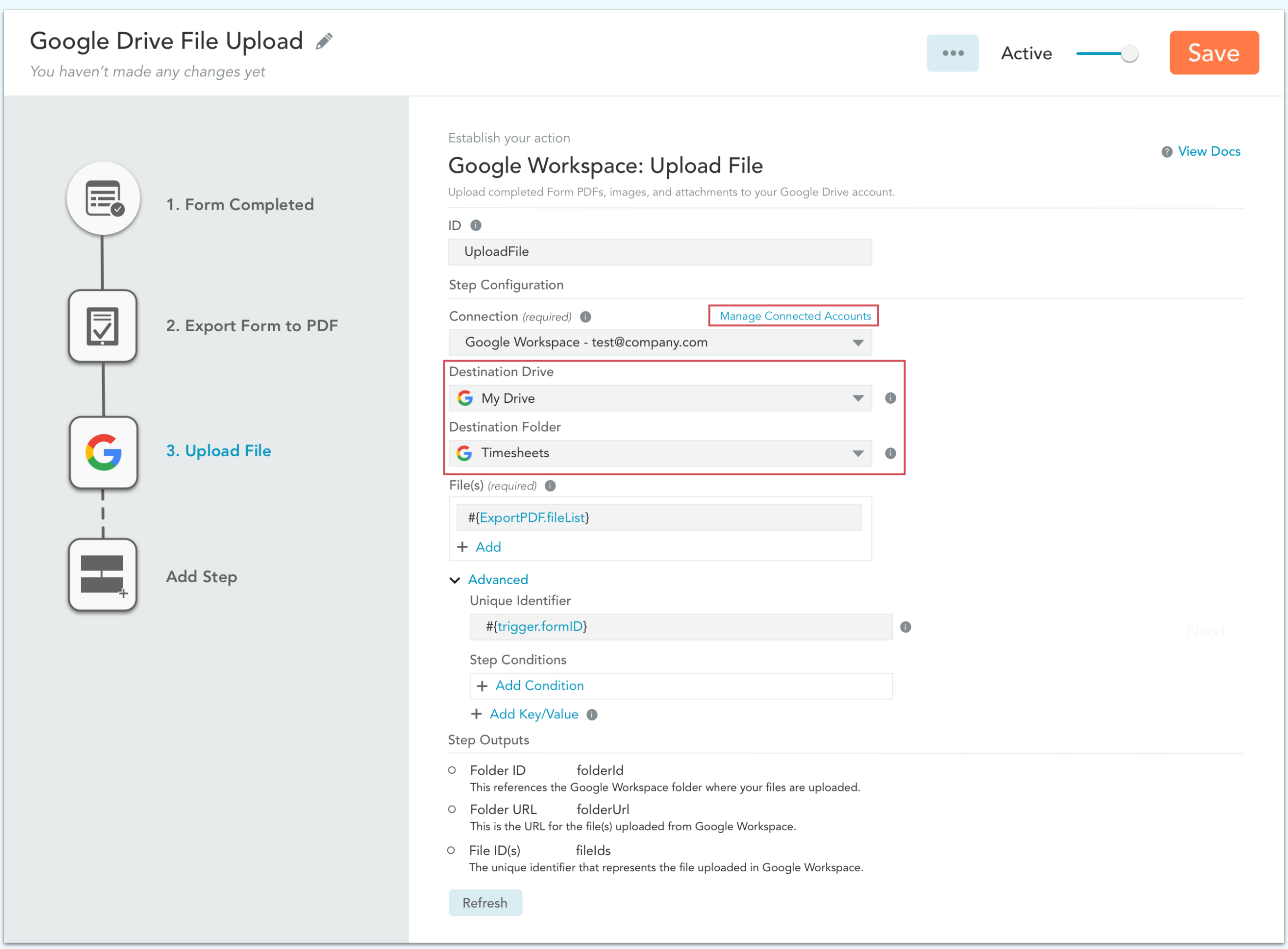
Now, let's proceed to the Advanced section, where we can customize the Filename to improve file searchability once forms are uploaded to a Cloud storage folder. Since we are using a timesheet in this example, we will use a variable that renames the PDF file based on the **Employee's Last Name and First Name**. To implement this, select #{trigger.Employee Last Name},#{trigger.Employee First Name}. Once you have configured this step according to your requirements, click 'Upload File' on the left-hand side of the screen.



In this final step of the *Workflow*, we will establish our connection with Google Workspace. If you haven't done this already, click on the 'Connection' drop down menu and a pop up window will appear to establish your connection. Alternatively, you can click on the 'Manage Connected Accounts' link highlighted in blue (located above the Connection field). From there, select the email address or Google profile associated with the Google Workspace account where you want the completed form copies to be uploaded. Then, choose the Destination Drive and Destination Folder for the files.

For this example, we will select 'My Drive' as the Destination Drive and 'Timesheets' as the Destination Folder. This means that all the timesheets will be uploaded to a folder named 'Timesheets' and sorted by the employee's last name. Once you have configured these settings, click 'Save'.

Finally, activate the *Workflow* and perform a test run to ensure that the *Workflow* operates exactly as desired. Once you have confirmed that the *Workflow* is operating as expected, you have a fully functional Auto-Upload to Cloud Storage *Workflow*.



Workflow #3: Auto-Populate Data From One Form to Another

Form to Form *Workflows* are most commonly used for auto-populating form data from one form to another. For example, a field technician completing a work order in the field can automatically generate an invoice for the back-office personnel with specific data (like a customer name or contact information) collected from the work order. This *Workflow* greatly streamlines processes, fostering productivity and collaboration within the workplace. To access this customized *Workflow*, you will need to be subscribed to our Advanced Tier or higher.

Before we proceed, we must first select the two *Templates* that will be utilized, along with the specific form fields involved. In this example, we will utilize a work order to create and populate a customer invoice with company and sales rep information.

The fields we are using from the work order:

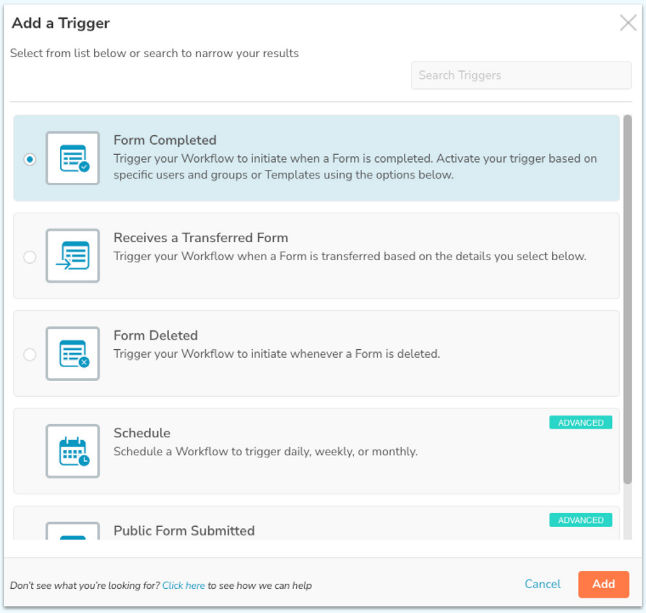
- Work Order Number
- Customer
- Customer Address
- Customer Email Address
- Customer Phone
- Sales Rep

The form fields we are using from the invoice:

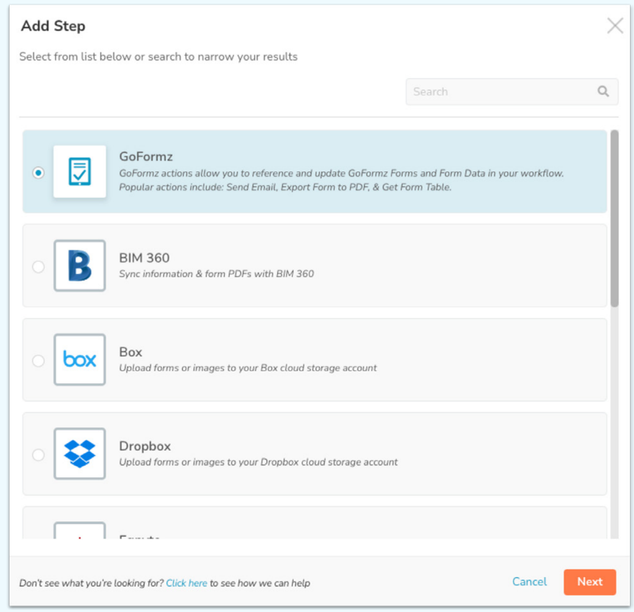
- Job Details Work Order #
- Company Name
- Company Address
- Company Email
- Company Phone
- Job Details Sales Rep Name

To get started, navigate to the 'Workflows' tab, select 'Create'. Unlike the previous examples, this time you will select 'Create Custom' in the top right corner. Next, click on the 'Add Trigger' module on the left-hand side of your screen, and a pop-up window will appear with *Trigger* options. Select 'Form Completed' as your *Trigger*, and then click 'Add' at the bottom of the pop-up window.

Next, we'll select which form *Template* we want to utilize as the *Trigger*. Since we're having a work order generate an invoice, select the **Work Order Template** and then select 'Add Step' on the left-hand side of your screen. We're working within the GoFormz platform, so you will select 'GoFormz' from the next pop-up window and click 'Next'.



Step 1: Add the Trigger 'Form Completed'



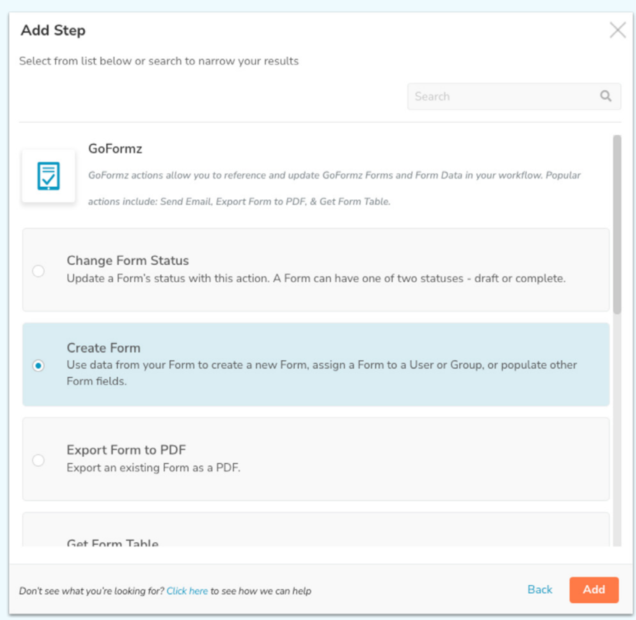
Step 2: Select 'GoFormz'

Next, you're going to select the list item 'Create Form' and then 'Add'.

In the second step of the *Workflow*, we will select the form *Template* that we want to create based on the work order information. To do this, navigate through the drop-down options until you locate your invoice *Template*.

Next, we need to assign a name to the form. To ensure clarity, we will enter 'Invoice for' and then include the customer's name. In this example, it will appear as: Invoice for #{trigger.Customer}.

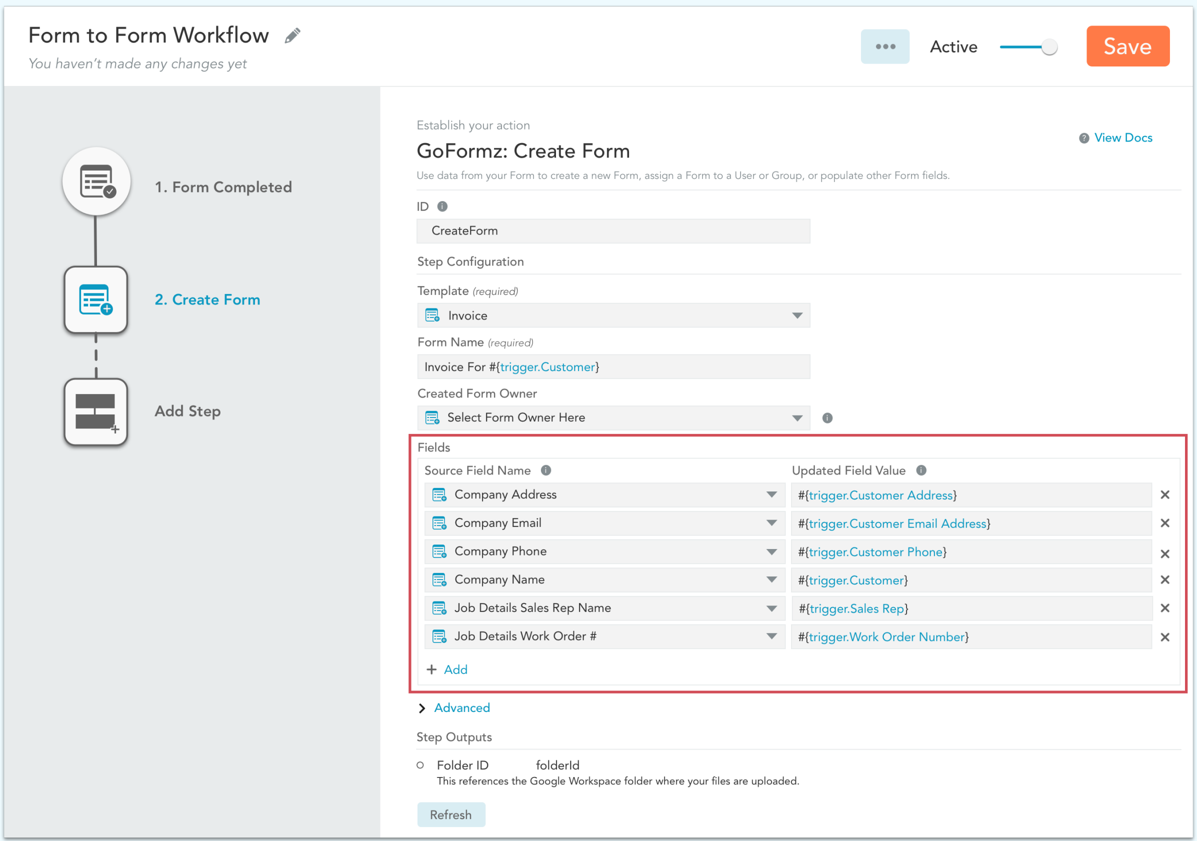
Moving on, we now need to identify the Created Form Owner. This field may vary depending on your account setup. For this use case, select the desired GoFormz user who will serve as the Form Owner.



Step 3: Select 'Create Form'

Now it's time to map the work order fields we want to use to populate the customer's invoice. On the left-hand side, under Source Field Name is referencing the Template Field Name that Updated Field Value is going to map to. On the right-hand side under the Updated Field Value refers to what is populated in the work order *Template*.

ProTip: To simplify the set up of your *Workflow*, use the same naming convention for the fields in your two form *Templates*. This makes it easier to accurately map your corresponding fields.



Now, toggle the 'Inactive' button to 'Active' and click 'Save'. Once we have our *Workflow* saved, we will run a test to make sure the *Workflow* runs successfully.

To test your *Workflow*, navigate to the 'Forms' tab of the GoFormz application, select 'New', and then click on your work order *Template* to initiate the *Workflow*. Fill out the *Form* and then click 'Complete'. Navigate back to the 'Forms' tab and now you should see right above your completed work order an incomplete invoice. Click on that form, and you should now see all your mapped-over fields auto-populated into the newly created invoice form.

If everything is mapped over appropriately, then you have successfully created a Form to-Form *Workflow*.

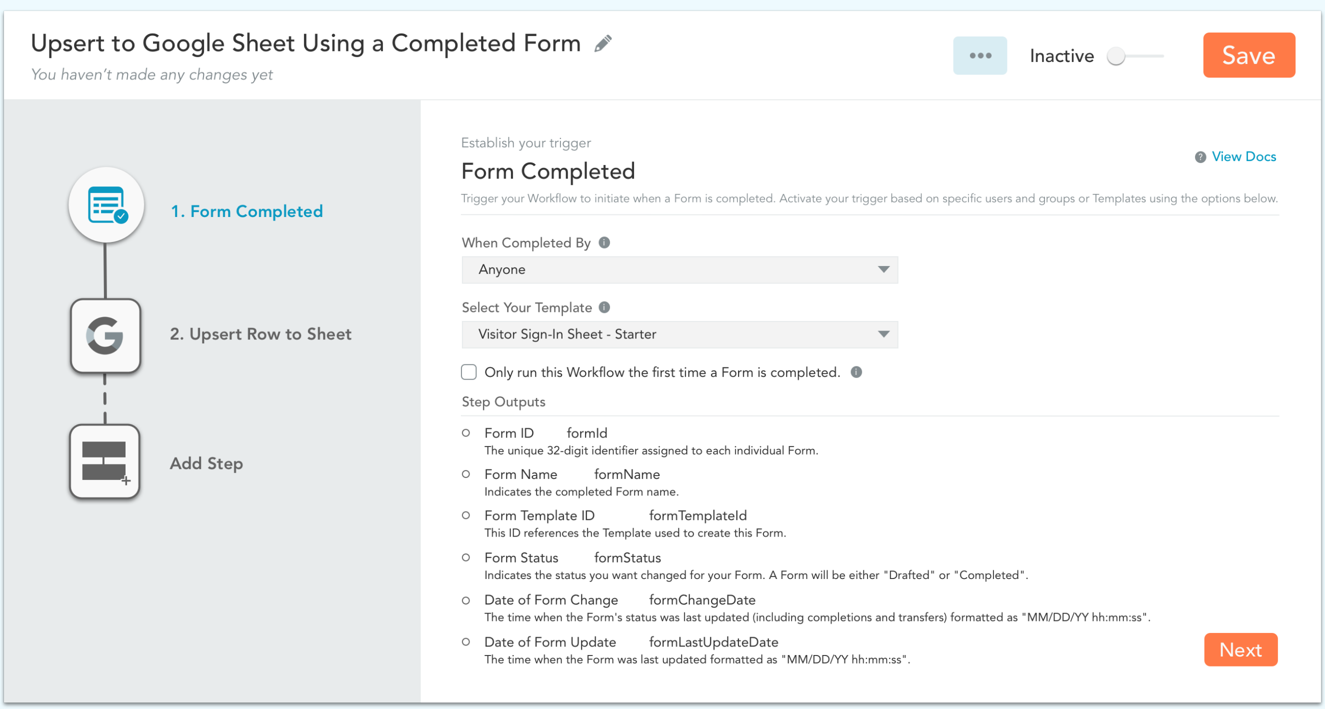
Workflow #4: Update Spreadsheets With Form Data

A popular GoFormz *Workflow* involves taking captured form data and adding it to a spreadsheet.

"Upserting" is the automated process of either updating an existing database table row, or adding a new row if it doesn't yet exist. In this example, we will utilize the "Upsert to Google Sheet Using a Completed Form" *Recipe*, since we have already established a connection with our Google Workspace account.

To get started, navigate to the 'Workflows' tab, select 'Create', and scroll down to the *Recipe* that says 'Upsert to Google Sheet Using a Completed Form'. Once you select that *Recipe*, the *Workflow* will open.

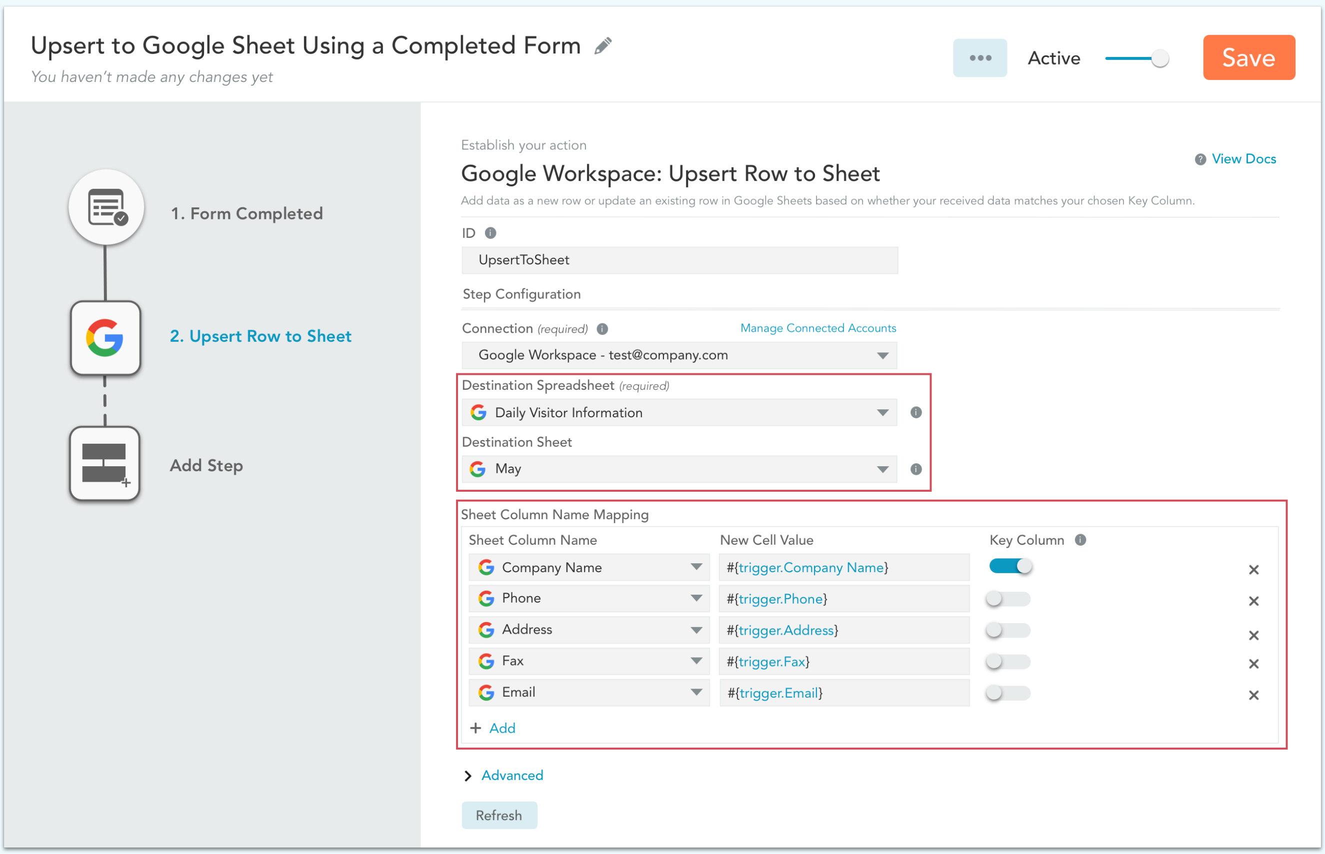
Now it's time to identify our *Triggers*. For this example, we are going to keep the 'When Completed By' section as **Anyone** and select a specific *Template* to use. We'll use the **Visitor Sign-In Starter Template** for this example and then click 'Next'.



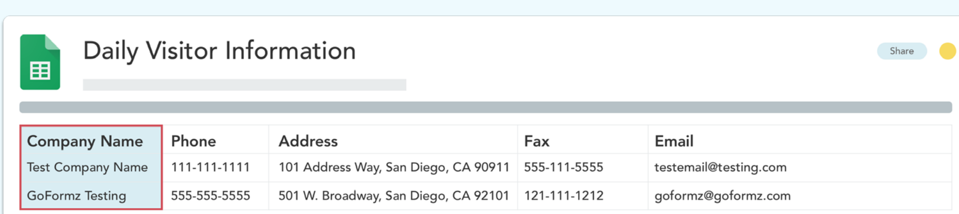
If you skipped use case two, you'll need to configure your connection with Google Workspace first, then select the appropriate spreadsheet to link the captured form data to. In this example, our destination spreadsheet is named **'Daily Visitor Information'**.

Next, we need to specify which sheet within the selected spreadsheet should be updated with form data. For this walkthrough, we will utilize a sheet titled '**May**', which identifies the visitors recorded during the month of May.

Now it's time to map our Sheet column names to our form data. This should look similar to the way we mapped our Form-to-Form *Workflow* in the previous example. The left-hand side of the Sheet Column Name Mapping points to our Google Workspace connection, while the right-hand side outlines the captured form data we want to transfer over to the Google Sheet. For this example, we are going to map the Company Name, Phone, Address, Fax, and Email form fields to the spreadsheet.



After properly mapping your data, you'll notice a column labeled 'Key Column' on the right-hand side. Key Column identifies which column should be used as the unique identifier to decide if data should be added as a brand new row or update an existing row. For this example, if the company name is your unique identifier, it will be added as a new row if the company name value doesn't already exist in the Google Sheet. If the company name value does exist, then that row will be updated with the most recent information from the form.


Daily Visitor Information

Company Name	Phone	Address	Fax	Email
Test Company Name	111-111-1111	101 Address Way, San Diego, CA 90911	555-111-5555	testemail@testing.com
GoFormz Testing	555-555-5555	501 W. Broadway, San Diego, CA 92101	121-111-1212	goformz@goformz.com

Once you have arranged all the information accordingly, click 'Activate' at the top of your screen and then select 'Save'. It's important to perform a test run to confirm that the *Workflow* has been successfully completed. When your test runs as expected, you will have effectively created an Upsert Data to Google Sheet *Workflow*.

Note: If you wish to perform more advanced data upserts, such as from a *Table* cell, please contact your Account Manager. They will connect you with our Professional Services team, who can assist you in bringing your *Workflow* to life!

Available Workflows By Tier

Please note that if you are a trial user, *Workflows* will not be available and must be manually turned on by your sales representative. If you wish to try *Automated Workflows*, contact a GoFormz representative, who will be able to assist you.

Team:

» Email a completed form
» Send an email when a transferred form is received
» Upload a file to Cloud storage applications (Box, Dropbox, Egnyte, Google Drive, OneDrive)
» Send a text message with Twilio

Advanced:

» Email a completed form with additional attachments
» Email a scheduled report
» Upsert data to OneDrive or Google Sheets using a completed form
» Add form data to your Google Sheet
» Send an email with a PDF copy of a submitted *Public Form*
» Upload a submitted *Public Form* to Cloud Storage
» Upload a scheduled report to Cloud Storage

Enterprise:

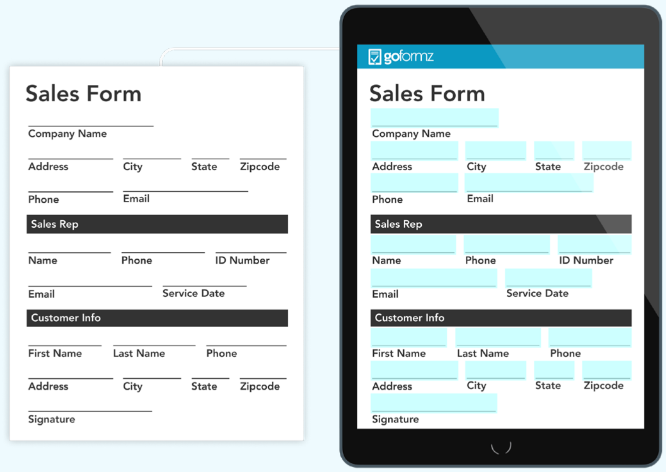
» Advanced *Workflow* Integration connections (Procore, Salesforce, SharePoint, and more)

Custom Workflows

Don't see a *Recipe* that matches your exact business needs? The GoFormz Professional Services team can help you create a custom *Workflow*.

Why Choose GoFormz?

GoFormz is the only digital form provider capable of preserving the original look and feel of your existing paper forms. This capability enables your business to maintain its branding, streamline user adoption, and uphold specific formatting requirements.



GoFormz provides users with a user-friendly, drag-and-drop digital form builder. This interface simplifies the form-building process, enabling users of all technological comfort levels to create digital forms to tailored to their unique business needs.

Your digital forms can be equipped to collect various data types like *Signatures, Barcodes, Sketches, Images*, and easy-to-use form *Logic*. GoFormz also provides an alternative viewing mode called *List View*, which empowers form creators to create forms from scratch without pre-existing *Templates* or forms.

Whether you're looking to eliminate paper-based processes solely or require a more dynamic approval process, with automation, digital form solutions like GoFormz can simplify your work life in numerous ways:

- Automating and streamlining previously manual processes into data-oriented workflows
- Eliminating obstacles in data capture, 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 and with customers, leading to faster and more efficient workflows

…and so much more!

Additional Resources

If you found this eBook helpful but are looking for additional information to kickstart your *Workflow* building, contact our team or check out the helpful resources listed below:

Support Documentation

- Workflows Overview
- Set up and manage Workflow recipes
- Email Completed Form Recipe
- Workflow & Integrations FAQ

Helpful Blogs

- Create Customizable, No-Code Workflows to Automate Common Tasks
- How Automations Can Streamline Your Business
- [Video] Business Automation with GoFormz Workflows
- Best Practices for Naming Your Form Fields

How GoFormz Users Are Using Workflows

- Auto-Email Workflows
  - Pacific Seafood – Mobile Food Processing Forms
  - Muller Management – Mobile Food and Beverage Forms
  - Kaw Valley Greenhouses – Retail Mobile Forms
- Upload to Cloud Storage Workflows
  - Arixio – Digital IT Forms
  - NTL Pipelines – Mobile Construction Forms
  - Budinger & Associates – Mobile Engineering Forms
- Form to Form Workflows
  - FOR Energy – Submitted forms generate a quote
- Form to Upsert in a Spreadsheet
  - Circle A Ag – Mobile Agriculture Data Upserts into Google Sheets
  - Lennon, Smith, Souleret Engineering, Inc. – Mobile Engineering Data Upserts into Excel Rows