

The Top Digital Retail Forms For the Holiday Season

Everything you need to simplify business processes to best prepare for the holiday season.

Table of Contents

Introduction: Simplify the Busiest Time of Year

The Benefits of Digitizing Your Retail Forms

The Top 5 Digital Retail Forms:

- Online Order Forms

- Digital Invoices

- Digital Surveys

- Digital Timesheets

- Merchandise Purchase Orders

Getting Started with GoFormz

Additional Resources



01

Introduction: Simplify the Busiest Time of Year

The holiday season is right around the corner and it's no secret to anyone – for retail, it's the busiest and most stressful time of the year.

Retailers are tasked with two challenging tasks: simplifying the holiday shopping experience for their clientele, while reducing stress for their holiday employees. Simplifying these established processes is often no easy task, requiring retraining and reworking crucial employee onboarding – taking time and resources away from preparing for your busy holiday season.

Now it's time to think beyond the typical holiday season and move into the future by implementing digital tools to improve productivity, the customer experience, and operational logistics, year round. GoFormz is the only digital and online form platform available that preserves the original look and feel of your existing retail forms – allowing your retail business to streamline user adoption, preserve formatting requirements, capture customer engagement, and so much more.

Within this eBook, we'll explore some of the most popular digital forms for the retail holiday season, features and fields that can be used to further boost your data collection, and additional resources to help kickstart your digital transformation within your retail business.

02

The Benefits of Digitizing Your Retail Forms

Retail forms vary depending on your business, but all of them develop the same problems when using paper documents – an inefficient mess. From managing inventory and customer satisfaction to employee wages and rotating schedules, retail businesses have a plethora of logistics to monitor and maintain. Introducing digital retail forms to your day-to-day operations presents your business with a powerful resource for improving productivity, efficiency, and customer experience, by:

- Eliminating physical record-keeping
- Compiling data digitally in a centralized location, in real-time
- Auto-filling connected platforms with collected data
- Capturing customer feedback in a streamlined manner
- ...and much more!

GoFormz has a powerful solution that allows businesses of all kinds to utilize the platform to match their unique needs. For the retail industry, there are a multitude of ways digital and online forms can be used to streamline operations – here are the top digital retail forms to best prepare you for the busy holiday season.

03

Top Digital Retail Forms

Online Order Forms

Are you selling products online? Rather than limiting your retail business to a certain set of hours, accept orders at all hours of the day with an online order form.

An easy way to maximize retail business opportunities is by embedding your order form to your website. Using the GoFormz *Public Forms* feature, you can share links to your online form via social media or using QR codes. This powerful functionality allows users outside of their GoFormz account to fill out and complete online order forms from any location. You can even instantly route completed order forms to colleagues, clients, and vendors, ensuring quick order fulfillment and delivery, while drastically improving your back-end processing.

By equipping your online form with logic, taxes, discounts, and summed totals can be instantly and accurately calculated, eliminating the need for manual math and opportunities for human error.

Online forms present a variety of opportunities to streamline your retail processes, saving your business significant time and resources during the busiest time of year.

The image shows two mobile devices displaying online order forms. The tablet in the background displays a 'Catering Order Request Form' with various input fields and a table for items. The smartphone in the foreground displays a 'Catering Order Request Form 10/18/2022 10:...' with fields for Customer Name, Phone Number, Email, and Address.

Key Features

- Public Forms
- Automated Workflows
- Form Logic

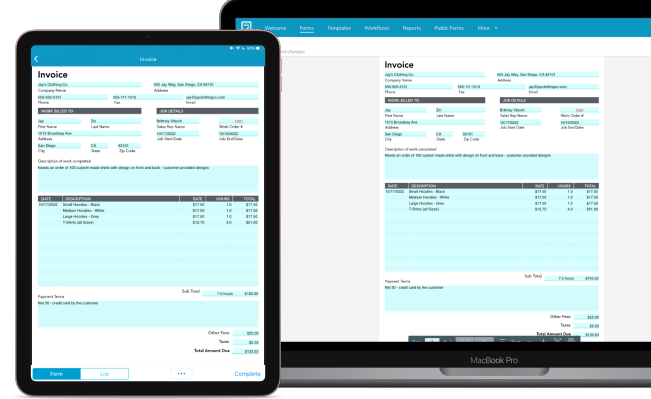
Key Form Fields

- Database Field
- Drop Down Menus
- Checkbox (Groups)

Popular Order Forms

- Purchase Order
- Delivery Order
- Pre-Order
- Product Order

Digital Invoices



An invoice is a critical document that itemizes and records transactions between your business and your customers. Not only does it confirm and log the products a customer purchases, but it allows the business to accurately track purchasing patterns and product inventory – a critical component of the holiday season. Closely tracking purchasing patterns allows your retail business to better prepare store layouts, promotions, and inventory management.

Digital invoices become powerful assets when they're connected with your existing databases – expediting payments, improving accuracy, and simplifying client communications. Leveraging form fields like *Tables* and *Databases*, digital invoices can rapidly reference customer information and streamline client communication processes by automatically routing forms to customer contacts, uploading completed invoices to corresponding cloud storage records, and automatically populating invoice fields with customer information. These customizable features add immense value to your digital invoicing process and optimize customer care.

Powerful features like automated form emailing and *Calculations* remove opportunities for human error, expedite client communication, and eliminate costly delays during the purchasing process.

For example, an invoice total can be automatically calculated using *Automated Calculations* and then instantly routed to customers. Tags can be configured to intuitively label your invoices to reflect your customer records, enhancing record-keeping and the organization of collected information.

Key Features

- Automatic Calculations
- Tables & Databases
- Tags

Key Form Fields

- Table Field
- Database Field
- Drop Down Menus

Popular Invoices

- Service
- Vendor
- Contractor

Digital Surveys

During the busy holiday season, stress is at an all-time high. To ensure your business is meeting the needs of your customers and employees, surveys are a quick and easy means of collecting feedback regarding your operation's services, products, and overall workplace environment. Digital surveys can be utilized in two ways: for the customer experience and for employee satisfaction. Gaining feedback immediately, especially during busy seasons, allows retail businesses to address concerns quicker and check in on employees in real time.

Digital surveys can be customized to meet your business' unique needs. For example, you can include custom *Likert Scales*, allowing respondents to give precise feedback to survey prompts. If a user responds negatively to a question, an additional field can auto-populate using *Conditional Logic*, and be made *Required*, ensuring thorough and actionable feedback is provided.

Gaining feedback from customers is made simple through the *Public Forms* feature, which allows individuals outside of your organization who do not have a GoFormz account to input information through online forms. This functionality significantly simplifies the customer survey process.

In the past two years, there has been a market shift in consumer behavior indicating shoppers are more willing to engage in online shopping according to the study conducted by McKinsey & Company. With online forms, when a consumer purchases a product, an online survey can be shared with the consumer immediately after their purchase, requesting their feedback. Upon completion of the survey, submitted information can be automatically routed back to your database and made available in real-time. This can help you identify weak points in your online, or in-person, shopping experience to improve customer satisfaction and increase return shopping rates.

Key Features

- Online Form Sharing
- Automatic Tagging

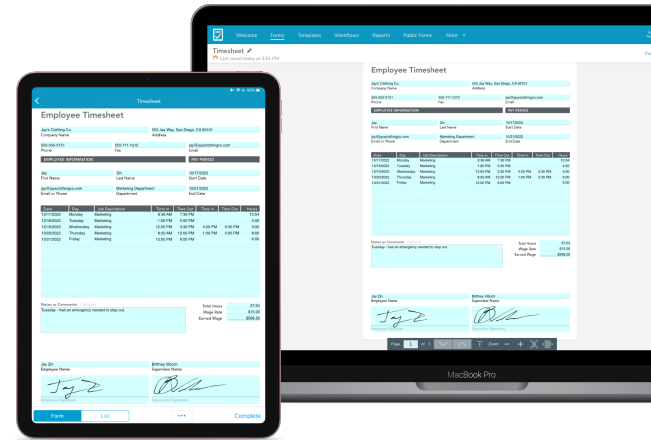
Key Form Fields

- Likert Scales
- Required Field
- Signature Field

Popular Surveys

- Customer Experience
- Employee Wellness
- Product Review
- Secret Shopper

Digital Timesheets



Digital timesheets provide a powerful alternative for both outdated and complex time-tracking solutions. Relying on a spreadsheet or a paper document to track employee hours along with overtime, holidays, and other special circumstances, increases the risk for critical errors, can add lengthy delays in bookkeeping, and makes for tiresome record-keeping. For these reasons, many retail stores are turning to customizable digital forms to expedite timesheet completion with improved accuracy.

Equipped with *Automatic Calculations* and fields that can reference *Data Sources*, your digital timesheets can be customized to cater to each form user's needs. For example, a store manager can create a *Data Source* which includes employee names, department information, hourly wages, and overtime rules. This *Data Source* can be utilized to pull information when a user is completing their digital timesheet and automatically calculate the correct totals for their respective role – creating a unique experience for each employee and ensuring accurate data.

Finally, paper documents require physical storage, whereas digital timesheets can be stored in the cloud. Store owners, managers, and supervisors can leverage the *GoFormz Reporting Tool* to run comprehensive reports across submitted timesheets to track employee productivity, shift spend, and performance. Reports can be automatically scheduled to be delivered to email inboxes, integrated platforms, and much more – all in real time!

Key Features

- Automated Workflows
- Automatic Calculations
- Reporting Tool
- Data Sources

Key Form Fields

- Signatures
- Date and Time
- Drop Down Menus

Popular Timesheets

- Seasonal Contractor
- Daily/Weekly/Monthly
- PTO Request

Merchandise Purchase Orders

Using outdated, traditional documentation methods (like emails, paper documents, and spreadsheets) for completing the procurement process has many drawbacks that can hinder your business efficiencies and result in material delivery delays and failures. You can remove the need for time-wasting tasks, like data rekeying, and increase the productivity of the purchase order process simply by going digital.

Cloud-based storage is one of the most critical features that digital purchase orders (POs) must include so that it can help save a history of purchase order requests over time. Digital purchase orders can be automatically routed to connected software platforms or uploaded to the cloud - ensuring historical data is secure and organized.

You can further streamline the procurement process by routing information using *Automations* that ease supply chain and inventory concerns. For example, once a seller has electronically signed off on a PO using a *Signature* field, the buyers can be automatically notified of the completed PO through an automated email notification – eliminating the hassle of manual processing.

The image shows two devices displaying the GoFormz Purchase Order form. The tablet screen displays the full form, including 'To' and 'Ship To' sections, a table for line items, and a 'Comments' section. The smartphone screen displays a mobile-optimized view of the form, highlighting the 'Company Section' with fields for company name, address, and contact information.

Key Features

- Dynamic Field Properties
- Automatic Calculations
- Integrations
- Auto-Email / Auto-Upload

Key Form Fields

- Table Field
- Signature Field
- Required Field

Popular Purchase Orders

- Team Apparel
- Wholesale

Getting Started with GoFormz

04

GoFormz's no-code, drag-and-drop form builder presents users with the easiest-to-use platform for digital transformation. Users can simply upload a JPG or PDF of their existing documents and add their desired fields – allowing businesses to maintain the look and feel of their existing forms while streamlining user adoption. GoFormz is the only solution that provides this powerful functionality!

These digital forms can be filled out from desktops, tablets, and mobile devices, shared with users outside the GoFormz account using *Public Forms*, and completed from any location – even offline. Complete with powerful features like *Automated Workflows*, *Reporting Tools*, *Conditional Logic*, and an array of drag-and-drop fields, GoFormz has rapidly become a leader in this space.

Getting started is incredibly easy

1. Upload a PDF or JPG of your existing form
(or create a form from scratch using the *List View* builder)
2. Make your form interactive and add Logic in the GoFormz *Template Editor*
Add digital fields, simple *Logic*, *Automated Workflows*, and much more!
3. Share editable forms with users outside of your GoFormz account
Collect data from anyone using our form sharing feature, *Public Forms*
4. Store, review, and report on data in real-time, route data to your existing systems, and much more

05

Additional Resources

If you found this eBook helpful but are looking for additional information to kickstart your retail operation's digital transformation, reach out to our team or check out the helpful resources listed below:

Helpful Blogs

- [Digital Forms for the Holiday Shopping Season](#)
- [3 Digital Form Automations for Retail Teams](#)
- [Elevate Retail Management with Mobile Forms](#)
- [3 Digital Checklists Every Retail Team Needs](#)
- [Simplify Retail Inventory Management with Digital Forms](#)

Current Retail Use Cases

- [Case Study: Kaw Valley Greenhouses](#)
- [Case Study: Jaguar Coffee](#)

Starter Free Templates

- [The Timesheet](#)
- [The Employee Evaluation](#)
- [The Invoice](#)
- [The Expense Report](#)
- [Request for Time Off](#)



To learn more, visit www.goformz.com

proservices@goformz.com



sales@goformz.com