



eBook

# Mobile Forms Buyer's Guide

**Invoice**

Green Leaf Landscaping  
Company Name  
(818) 675-2839  
Phone  
227 West Elm Road  
Address  
sales@goformz.com  
Email

**WORK BILLED TO**

First Name: Jim  
Last Name: Anderson  
Address: 98 Valley Drive, Suite #200  
City: Pasco  
State: WA  
Zip Code: 99035

**JOB DETAILS**

Sales Rep Name: Alexander Johnston  
Work Order #: 1003  
Job Start Date: 9/18/2019  
Job End Date: 10/18/2019

Description of work completed  
Exterior commercial property assessment, design, and landscaping

DATE	DESCRIPTION	RATE	HOURS	TOTAL
9/18/2019	Assessment of prior landscaping	\$65.00	2.0	\$130.00
9/22/2019	Design recommendations and quote delivery	\$65.00	8.0	\$520.00
9/30/2019	Vegetation removal and irrigation installation	\$65.00	10.0	\$650.00
10/3/2019	Lawn implementation	\$65.00	4.0	\$260.00
10/10/2019	Flowerbed implementation	\$65.00	8.0	\$520.00
10/13/2019	Water feature installation	\$65.00	3.0	\$195.00
10/16/2019	Final inspection and customer sign off	\$65.00	1.0	\$65.00

Sub Total: 36.0 hours

Payment Terms

Other Fees

Form List Complete

[www.goformz.com](http://www.goformz.com)

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# Select the Perfect Mobile Forms Solution for Your Business

Making the transition from paper-based documentation to digital data capture can feel daunting. Businesses often delay their search for a digital solution to paperwork due to the sheer number of perceived time and financial investments, including:

- » Fear of disrupting workflows
- » Difficult onboarding (including the costs of adopting a new system)
- » Intimidating costs of solutions
- » The need for IT or coding experience

Although these reservations are warranted, there are a variety of solutions available that help teams sidestep obstacles to their [digital transformation](#) – without depleting their budget.

Mobile forms provide a flexible, professional solution to manual data collection, while simultaneously introducing new opportunities to streamline business processes and reduce administrative overhead.

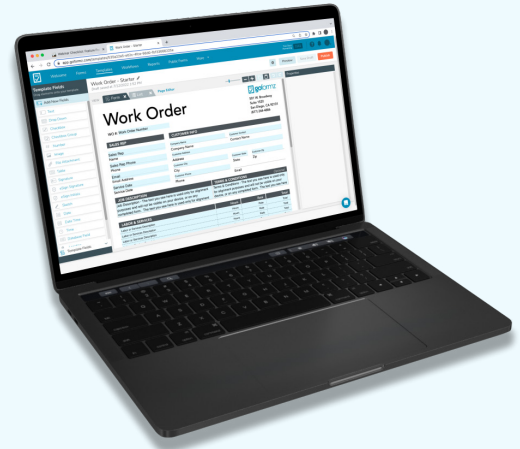
So where should your business begin the hunt for a digital data capture and paperless form solution? This guide will walk you through the features, functions, and benefits to look for when selecting your mobile forms and data capture solution.

The image displays two versions of a 'Sales Form'. On the left is a traditional paper form with a clean, white background and black text. It includes fields for Company Name, Address (split into City, State, and Zipcode), Phone, Email, Sales Rep (with a dark header bar), Name, Phone, ID Number, Email, Service Date, Customer Info (with a dark header bar), First Name, Last Name, Phone, Address (split into City, State, and Zipcode), and a Signature line. On the right is a tablet displaying the same form as a mobile app. The app version features a blue header with the 'goformz' logo, a more compact layout with rounded input fields, and a dark header bar for the 'Sales Rep' section. The form fields are color-coded with light blue and white backgrounds, and the overall design is more modern and user-friendly for mobile use.

# Why Go Digital?

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Replacing existing processes with new, digital solutions can feel challenging; learning curves are intimidating by nature, but they shouldn't stop you from exploring new solutions and technologies. The benefits of digital forms and data capture far outweigh any hesitancy you and your team may have. From eliminating illegible scrawl and human error to automating repetitive tasks and improving communication and collaboration among your team, digital forms have the ability to directly impact your profitability and productivity.



Taking your data capture, documentation, and processing to a digital environment results in versatile benefits, including:

- » Time and money savings by eliminating manual data entry and streamlining workflows
- » Real-time data available when you need it, where you need it
- » Improved insights and transparency for more informed business decisions
- » Streamlined 'paperwork' with no more lost or delayed information
- » Better record-keeping for audit preparation and year-over-year analysis
- » Increased efficiency throughout your entire team
- » Enhanced customer experiences when interacting with your business
- » Transparency within your business communication channels

***"The 25% of firms that excel both in digital intensity and transformation management capabilities are 26% more profitable, generate 9% more revenue from their physical assets, and achieve 12% higher market valuations than other large firms in their industries."***

– MIT Initiative on the Digital Economy, Capgemini Consulting & the MIT Center for Digital Business survey

# What to Look For in Your Mobile Forms Solution

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Your roadmap to mobile forms buying success.

Before deciding on the key features and benefits your team should prioritize when searching for a [mobile forms solution](#), there are a few questions you need to ask. Your perfect digital forms solution will depend on your individual business and industry needs, but the following questions are a great place for everyone to start. If you're ready to move away from paper forms, here are the nine biggest questions to ask of any prospective vendor:

- » Is this solution scalable?
- » How much will my existing forms and processes change?
- » What additional data points will I be able to track?
- » How much redundant data will my employees and customers have to enter?
- » Will this solution work with my existing tech stack?
- » What options do I have for sending my data to other software platforms?
- » Will my employees be limited by device or location?
- » Does this solution allow me to present my brand well to my customers?
- » How will this solution improve my existing data analysis and reporting?

Only you and your team will know what answers are acceptable for your business. Before you begin looking at potential solutions, develop a deep understanding of your organization's needs (internally and externally) for each of these questions. By putting thought into what you really need from a digital form solution before you begin your research you'll be better able to identify best-in-class solutions that will enhance your business processes.

The illustration shows two mobile devices. The tablet in the background displays a 'Form View' of a 'Purchase Order'. It has input fields for 'Vendor:', 'Street Address:', 'City:', and 'State:'. Below these is a table with columns 'Item #', 'Description', 'Unit Price', and 'Q'. The smartphone in the foreground displays a 'List View' of a 'Vendor Information' form. It has tabs for 'Vendor Info', 'Item Table', and 'Notes/Signature'. The form fields include 'Vendor Name', 'Street Address', 'City', 'State', and 'Zipcode'.

**Ready?**  
*Let's get started!*

# Scalable Success

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When searching for a digital solution to traditional paper forms, it is incredibly important to consider the long-term goals and growth of your business. Selecting a 'band-aid' solution (e.g. fillable PDFs, editable spreadsheets, or homegrown IT solutions) to temporarily improve one or two elements of your business leads to wasted spend, isolated data, and frequent inaccuracies. Achieving sustainable results from your mobile forms and digital data capture requires a scalable solution that can grow alongside your business. To identify which mobile forms solution will scale to meet the growing needs of your business, look for:

## *An Easy-To-Use Form Builder*

As your business grows you'll need to create new and edit existing forms, and you'll want to do it with a [user-friendly template builder](#). A platform with a cumbersome form builder will only create more work for you and your team down the road. Instead, look for a solution that requires no coding background or knowledge, and offers customization options that anyone in your organization can use.

## *An Agnostic Interface*

Investing in a mobile forms solution that doesn't jive well with your employees' devices won't last long. Make sure that whichever digital form provider you pick, you know that your employees will be able to access your forms easily. Whether it's from a computer, a smartphone, or even a tablet, your employees will thank you if their experience across all devices is the same.

## *It Plays Well With Others*

If your existing tech stack and software solutions have been serving you well, don't pick a mobile forms provider that can't play nicely with them. The best digital forms providers will likely have a full list of [native integrations](#), but top-tier solutions will also offer an open API for your team to custom-build data communications. This is a great way to make sure that no matter how quickly, or substantially, your business grows, you're never missing out on data capture.

***"...the flexibility that we've had with GoFormz we couldn't replicate anywhere else."***

– Tray Ivey, President of DESHAZO's Service Group

# Familiar Forms, Fresh Features

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Successful change management means only making adjustments where they're needed, not just because you can. Consider how this new solution will impact your team – how much will they need to relearn? How intuitive will this solution be? Some so-called 'solutions' place the onus on the end user, forcing teams to capture data within a new and unfamiliar app interface, complicating onboarding, and potentially breaking existing daily workflows and processes.

***"In 2019, leaders in enterprise technology were growing 2x faster than those who lagged behind them. Thanks to global changes, in 2021 we found that leaders have doubled down on their tech investments and are now growing 5x faster than laggards."***

– "Make the Leap, Take the Lead" Accenture Research Survey, 2021

By selecting a mobile forms solution that preserves the look of your original paper forms, your new digital forms can be more seamlessly implemented throughout your organization. Working within an interface they already know well empowers your team to more quickly and confidently adapt to their mobile forms – dramatically reducing onboarding demands and costs.

You'll know a provider is the right fit when your team and customers can easily identify the forms they're used to, but your internal processes no longer require manual data entry. It's important to note how long it takes you to create these forms as well. This process should be as fast and simple as uploading an image of your existing forms, then selecting and adding the proper field type for each space on your form. Anything more tedious than that will only cause your team additional grief and make for a steep learning curve.

**Insider tip:** Select a solution that provides alternative viewing options, tailored to different screen sizes. For example, platforms like [GoFormz provide two viewing modes](#): users can toggle between the original mobile form on larger screen sizes and an app-like index of fields designed for [smaller screen sizes](#).

# New Data Types

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Filling out forms on mobile devices presents end users with endless benefits, including the ability to capture and route [new data types](#), unattainable via paper forms. Leveraging your mobile device's native features, data types like images can be easily added to your form and annotated to highlight key features. This functionality is incredibly powerful when working in difficult locations or communicating with customers. Your employees in the field no longer need to capture images separately for email or print communications, they can add a photo and annotation directly to their form with just a 'tap'. For any business looking to enhance their client communications, work with detailed documentation agencies, or just cover all their bases for any audits, this feature is non-negotiable.

When researching your mobile forms solution, be confident in prioritizing these new data types. There are solutions that can meet all your business needs, from E-SIGN Act-compliant [electronic signatures](#), to [GPS data points](#), and even [barcode scanning](#). Making the change to digital forms is a big step for your business, and you shouldn't feel pressured to settle for a platform or provider that can't handle all your business needs. With top-ranked solutions, you'll find these features listed out in different tiers or feature availability, but for some providers these can incur hidden fees. Always work directly with a sales or account representative to be sure you know what your out-the-door price will be.

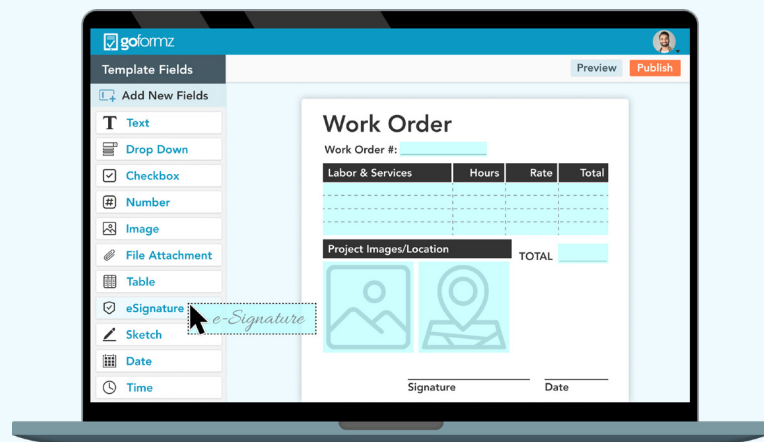




# Pre-Fill Forms and Fields

A fantastic result of digitizing your forms for use on mobile devices is the ability to effortlessly streamline data entry and expedite form completion. When comparing mobile form platforms, keep in mind the automations and dynamic properties offered by each solution. While some solutions require the same data to be re-entered form after form, your chosen platform should offer opportunities to instantly [fill previously captured data](#), via intuitive actions.

When selecting a mobile forms platform, look for ways that you can pre-fill or automate your data entries to minimize the work on your team and your clients. Reducing redundant data entry can ease the stress and workload of your team while streamlining your customer experience.



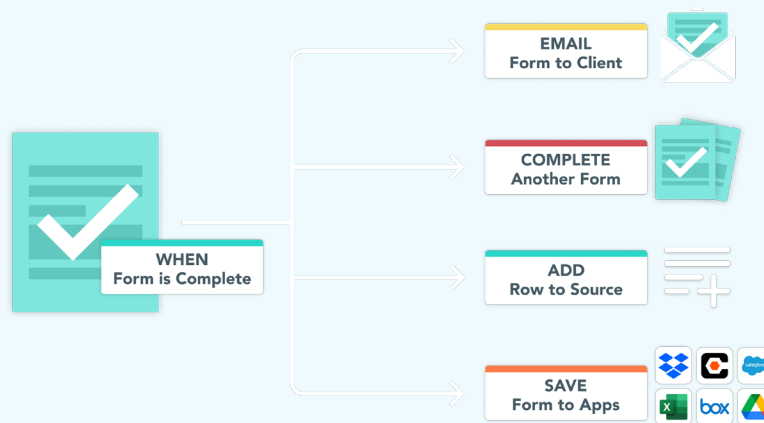
Depending on the systems you're evaluating, you may have choices between drop-down menus, QR code scanning, or even barcode scanning. Using any of these options you can set the option to pre-fill some of your form information, such as client address or contact information, or even prices associated with different materials or labor costs. This dynamic feature not only accelerates form completion but also guarantees the accuracy of your data.

***"Each week, employees waste more than 10% of their time duplicating efforts—four hours 38 minutes on average. Annually, that's more than 200 hours lost to manual, low-value tasks that they or someone else has already done."***

– Anatomy of Work Index, Sapio Research & Asana, 2019

# Limitless Workflow Capabilities

The mobile forms platform that you select should also provide automation that extends beyond the form itself. Time spent on repetitive or low-value tasks, such as filling out, searching for, or correcting inaccurate forms can add up across all industries. Some studies have put this total at [10% of an employee's week](#), racking up lost time and money for your business.



Effective mobile forms act as a front end to your connected systems and data collection, liberating siloed data via real-time routing and dynamic automations. These mobile form automations turbocharge your existing processes, allowing forms and data to move at the speed of digital.

[Form workflows](#) give your team more control over their day, and minimize manual entry. But they can also streamline more of your daily business tasks and improve your client communications. Some examples of features or workflow processes that you should seek in your digital forms solution include:

- » **Automatically route** copies of completed forms to team members, customers, or third-party stakeholders
- » **Facilitate collaboration** through digital form transfers, allowing multiple form drafts or approvals
- » **Launch new forms**, pre-filled with your existing business data
- » **Update connected systems** within your tech stack through [native integrations](#) or an open API
- » **Run and deliver reports** or automatically send form data to your existing reporting and analysis tools
- » **Amend databases** and spreadsheets without the need for manual data entry
- » **Notify collaborators** and stakeholders when a form is ready

# Getting Your Data Where It Needs to Go

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With paper forms, collected data must be hand-delivered and manually rekeyed into applications, resulting in frequent delays and opportunities for errors. Using select mobile form platforms as a front end for data capture, collected information is preprocessed and 'sanitized', prior to updating connected business systems and databases.

Throughout your digital forms platform selection, keep an eye out for features that can tidy up your data by increasing accuracy and completeness. Depending on your business needs, this can range from basic calculations that remove mathematical errors from your invoices, estimates, and timesheets, or extensive dynamic features, such as required or conditional fields, or electronic signatures that keep your forms in compliance with industry regulations.

Using a trusted digital forms solution not only ensures that your data is accurate, removing redundancies in your workflow, but it can also get your data to its final destination without requiring manual data entry. Work with your individual business departments, including your IT team or specialist, to create an exhaustive list of everywhere your data currently resides. Then, brainstorm the data capabilities that will help your business achieve its goals or improve workflow processes in a meaningful way. This list should be your roadmap when searching for a digital forms solution. Whichever provider you select, your mobile and online forms should support the seamless exchange of data between your customers, your team members, and all the connected applications in your tech stack.

The benefits of connecting your digital forms to other applications via turnkey integrations and available APIs are endless. When searching for your mobile forms solution, you should feel comfortable and confident in explaining the flexibility of the platform's integration capabilities to the rest of your team. Getting all stakeholders within your business to see how this will streamline data entry for them directly will make the change management and adoption process much smoother.

***"Being data-driven makes you 23x more likely to acquire customers, 6x more likely to retain them, and 19x more likely to be profitable as a result."***

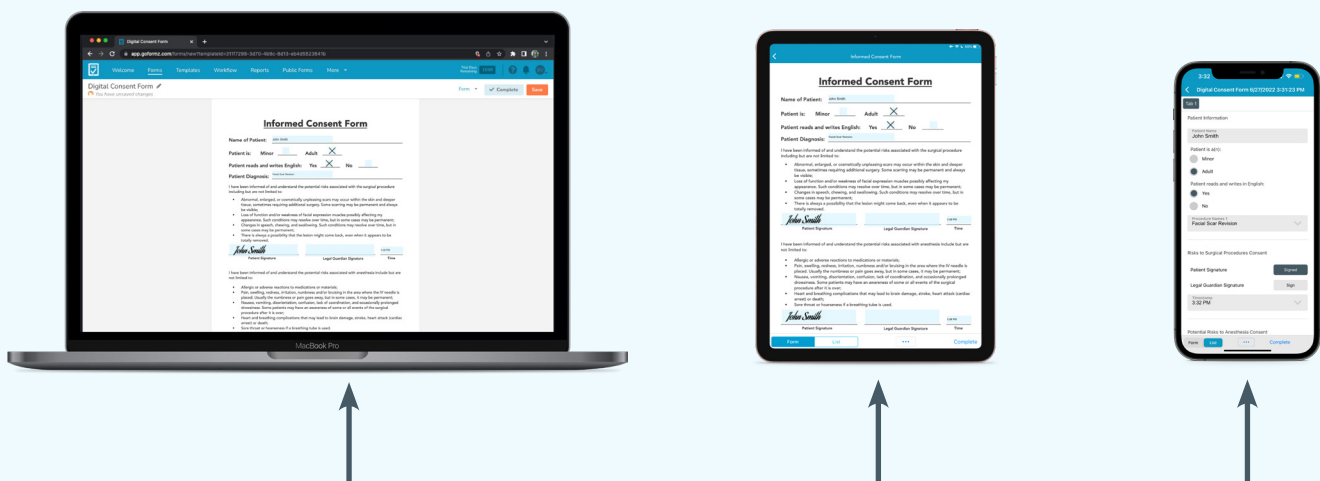
– The Insight Driven Business, Forrester Report, 2016

# Data Capture Exactly Where You Need It

For many businesses, work isn't always confined to an office with WiFi access. If you have team members working in the field, or interacting face-to-face with customers, you'll need a digital forms solution that can handle data capture on the go.

Take inventory of the devices your team is using, whether they have phones, tablets, or laptops, and what operating systems they're all running. Next, when evaluating a digital forms solution, keep in mind that you need a streamlined experience across all of these platforms and devices. To simplify training and onboarding, a cohesive native app experience from Android to iPhone is a must. If you have employees who frequent rural or low-service areas, make sure that the app for your selected digital forms platform doesn't require constant connectivity. If your team can't access their forms, including any data sources or databases associated with those forms, offline then that solution isn't the one for your team.

Don't forget your office employees either. If a mobile forms solution is limited to just an app, but you have teams in your organization that primarily use a desktop or laptop computer, forcing them to begin using their mobile devices to complete their day-to-day workload is going to add an additional level of frustration for them. The best digital forms solutions can meet every member of your team exactly where they're at, with or without an internet connection, on any device.



# Present Your Brand Well

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When making the switch to digital, businesses often struggle with the unfamiliar look and feel of their mobile solutions – a frustration only exacerbated when working with clients. When working with external-facing documents, the right mobile forms solution can easily elevate your team's professionalism. By eliminating illegible handwriting, inaccurate calculations, and damaged paper forms, moving to a digital forms platform can substantially improve how your clients perceive your business.

Leveraging an online form solution that allows your business to preserve the original look of its forms provides customers with a familiar document, improved with digital features and capabilities. Features like electronic signatures, project images, and table fields presenting line items or hours worked can add credibility and context to your form data, increasing customer satisfaction. Using form automations, customer-facing forms can even be routed to clients as soon as they're completed, improving communication and accelerating billing cycles.

# Analyze Your Data in Real-Time

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If you're not putting your captured data to work, you're leaving business on the table. Even if your business amasses huge amounts of data, it all means nothing unless it is leveraged to garner meaningful insights and drive business decisions. The most powerful mobile form platforms provide not only built-in reporting but also the ability to route your data to databases and business intelligence tools. Your business dashboards can update in real-time as new data comes in via mobile forms from the field, allowing you to make better decisions, faster. Your selected mobile forms platform should also provide automation and scheduling for each of these powerful capabilities, allowing for streamlined, regular analysis.

When deciding on which digital forms platform to invest in, the most important decision is going to rest on how much data you can capture, and how you can best utilize it within your business. Even the best digital forms in the world are meaningless if you can't pull strategic insights from your data. Speaking directly with a sales or account representative at your digital forms provider of choice can usually lead to the best answers. Be direct and let them know exactly what data you want to be capturing, what information you're not able to capture with your existing paper processes, and let them fill you in on how their solution can solve these pain points.

# Why Choose GoFormz?

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GoFormz online and mobile forms go beyond your standard form app. As the only mobile forms platform that leverages patented technology to allow users to create digital versions of their existing forms, your team and customers can experience a seamless transition. Using digital forms that look exactly like your existing paper documents simplifies and expedites onboarding while providing a more professional, modern means of documentation for customers and partners.



**See how businesses are using GoFormz**

**Learn More**

## *Customizable Forms and Integrations*

A familiar interface provides a flexible front end for field teams collecting data, but powerful data capture with meaningful integrations will streamline workflows across your entire business. [Powerful connections](#) with platforms like Salesforce, Procore, Smartsheet, Google Workspace, ServiceMax, Box, Egnyte, Dropbox, and more, allow data to be passed seamlessly between your mobile forms, systems of record, and databases.

## *Built for Every Device*

GoFormz also provides a [small screen optimized viewing mode](#) for every form, which can be easily toggled on and off whenever a user may need it. Mobile forms can be used offline and later synced to your account once a signal is available. GoFormz mobile forms can also host a variety of [new data types](#) like Images, Sketches, GPS/Maps, and E-SIGN Act Compliant [electronic signatures](#).

## *Accessible to Everyone*

Finally, using the [GoFormz Public Forms feature](#), you can share links to your mobile forms for people outside your GoFormz account to input data, approve form completions, and more. Once a link to your Public Form has been distributed, recipients can load the digital form in their web browser, enter data into the pre-selected fields, and hit 'complete' when ready. Using Public Forms to share editable forms drastically simplifies the collection of signatures, customer surveys, new client information, and so much more.

# Getting Started with GoFormz

[Getting started with GoFormz](#) is incredibly easy, and requires no code or IT support. First, [sign up for a free GoFormz account](#) and log in from a computer, then:

1. Upload a PDF or JPG of your form [or use one of our free Starter Form Templates](#)
2. Drag and drop fields onto your uploaded form, in the Template Editor
3. Make your form fields interactive and dynamic in the Properties panel
4. Automate form actions (like routing and tagging) in the Manage Events Window
5. Download the GoFormz app and start filling out forms from any mobile device

To learn more about getting started with GoFormz, [sign up for a free account](#) and check out our [GoFormz Starter Guide](#), our [Video FAQs](#), or our [Video Tutorials](#).

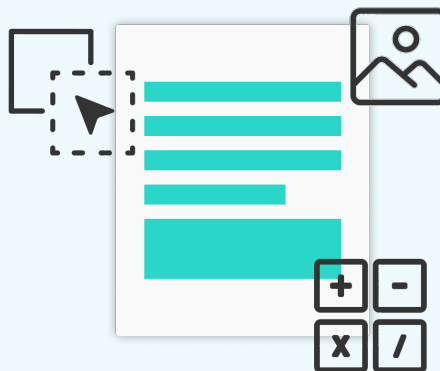
**Sign up for free**

## 1. Upload



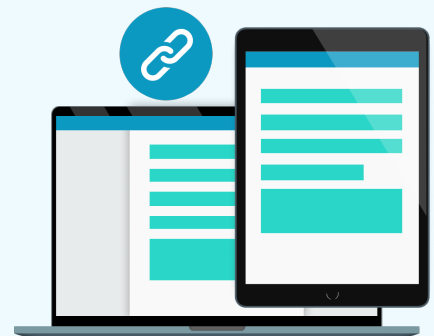
*Digitize an existing form  
or create a new form  
from scratch!*

## 2. Build



*Build your digital forms  
in our drag-and-drop  
form builder*

## 3. Share



*Fill out forms on mobile  
devices and share  
forms online*