

# Top 7 Mobile Form Features to Modernize Your Business

GoFormz is the leading Mobile Forms solution. Used in over 170 countries by more than 17,000 customers, GoFormz helps you eliminate your paper forms and modernize your business.



- Capture data electronically with mobile forms that look exactly like existing paper forms.
- Store and access your forms and data in our cloud-based platform or with partners like Box.
- Include powerful dynamic form features like automated calculations, pre-filled fields, and drop-down list boxes.
- Capture new types of information like GPS, images, signatures, and more.
- Complete your forms on any mobile or desktop device.
- Monitor your operations and analyze your business with easy-to-use online reports.
- Use workflow and notifications to keep everyone informed and ensure procedures are followed.
- Integrate your data with your other business systems via our API.

Companies that use GoFormz enjoy a more efficient way of filling out forms, managing and analyzing their form data, and collaborating with customers and colleagues.



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# INTRODUCTION

For hundreds of years people have been filling out forms on paper. Using paper forms is an error-prone, time consuming and outdated process. With the proliferation of mobile devices like iPads in the workplace, mobile forms have become vital tools for modern businesses. Filling out forms on a tablet means increased efficiencies, reduced costs and access to the advantages of digital technology. This ebook discusses seven of the most important mobile form features and their benefits.



# SO, WHAT EXACTLY ARE **SMART MOBILE FORMS**?



Smart Mobile Forms are so much more than flat e-documents like fillable PDFs, or web forms you can access on a mobile device. They are easy-to-use forms on your mobile device that look just like their paper versions, but also deliver an efficient, interactive and powerful user experience that tablet users have come to expect from mobile apps as well as from business systems.

Here are the defining characteristics of Smart Mobile Forms:

- They look identical to your paper forms but have app-like capabilities including cut & paste, zoom & pinch, and swipe.
- They capture new types of data available on your device, such as GPS, date & time, and camera images.
- They automate calculations and increase the speed of data entry with features like option lists and conditional logic.
- They are stored in the cloud and can be tagged and shared.
- All data is searchable with reporting tools and business analytics.
- Form documents and data can be easily used in other business systems such as CRM, HR, and workflow solutions.
- Form data is instantaneous, searchable, and accessible in real time.
- They are mobile and work offline.

In this eBook we highlight the 7 key mobile form features that modernize businesses.

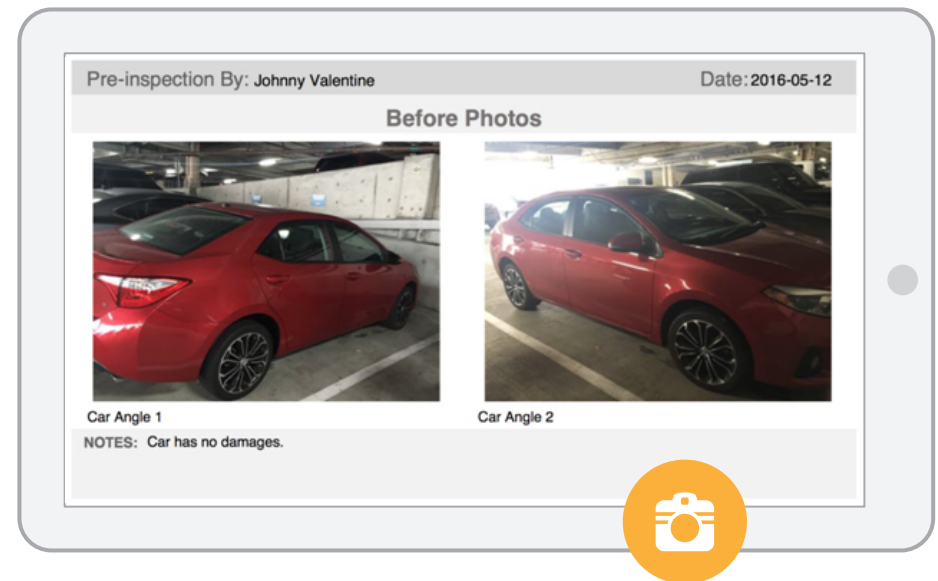
# FEATURE 1

## PHOTO & IMAGE FIELDS

You have likely heard the saying, “a picture speaks a thousand words.” Photo and Image Fields provide visual information that a textbox simply cannot. Including photos on a traditional paper form is difficult because it requires extra equipment (like a camera) to capture the images and additional procedures to physically attach them to the original documents. Mobile forms give you the ability to include images directly on your form and use the built-in camera on your device to capture them.

### BENEFITS:

- More complete data and visual information
- Less equipment to carry on the job
- Instantly capture pictures and include them directly in your form



## USE CASE

Image fields greatly enhance inspection forms by providing visual information. Why just rely on a text description to convey the results of a visual inspection when you can simply snap pictures with your mobile device? Augment your written inspection findings with a corresponding image.

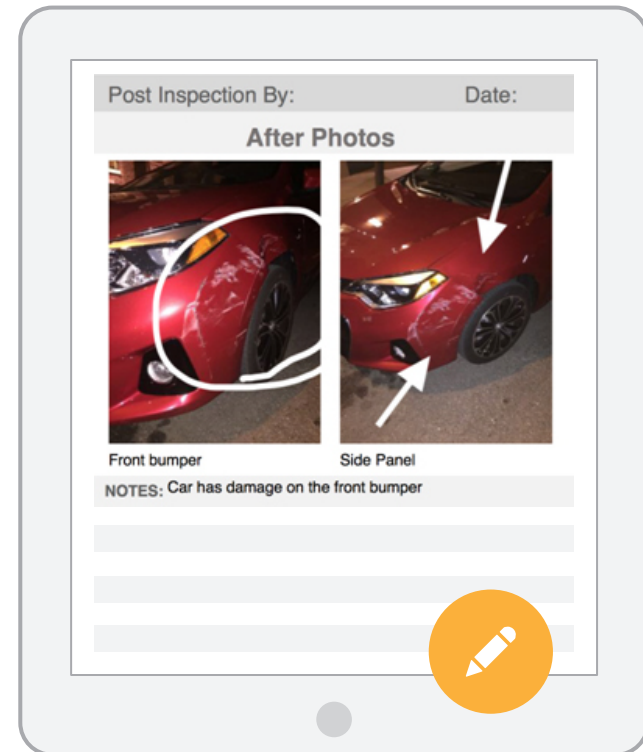
# FEATURE 2

## SKETCH & DRAW FIELDS

Use Sketch & Draw fields to augment your images and highlight key points of interest. This will save you from having to write paragraphs of descriptive text. Simply circling or pointing at a specific area on a photo helps to avoid confusion while clarifying details. Be clear and concise to save time.

### BENEFITS:

- Save time by avoiding long text descriptions
- Prevent confusion with more complete visual data
- Highlight key points of interest on your photos



## USE CASE

Vehicle rental agreements document the before and after condition of rental vehicles. A visual inspection form equipped with Sketch & Draw fields allows you to take photos of the actual car, and highlight specific points of interest before the car is used and after it is returned. This provides very accurate documentation and visual records of vehicle condition and use.

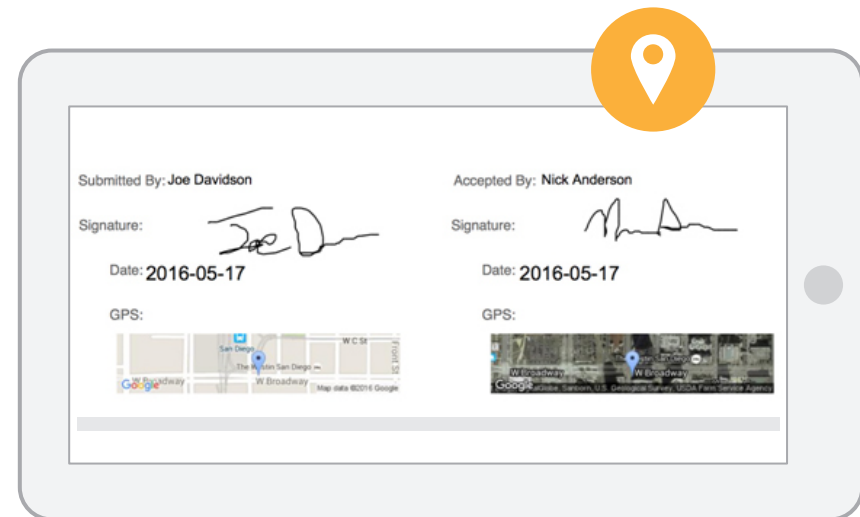
# FEATURE 3

## GPS FIELDS

GPS fields provide mobile form users a unique piece of data that a paper form cannot. With a simple tap on your mobile device, these fields capture the exact location of your mobile device, apply a timestamp with coordinates, and populate a small map image with a location pin. You now have the ability to easily and accurately record location information.

### BENEFITS:

- Capture more detailed data
- Record accurate location specifics
- Document transaction and project locations via coordinates and maps



## USE CASE

GPS fields are an extra level of detailed data. Use this field to record where deliveries or transactions take place. Using a corresponding signature field to record who accepted a delivery greatly improves data tracking and record keeping.



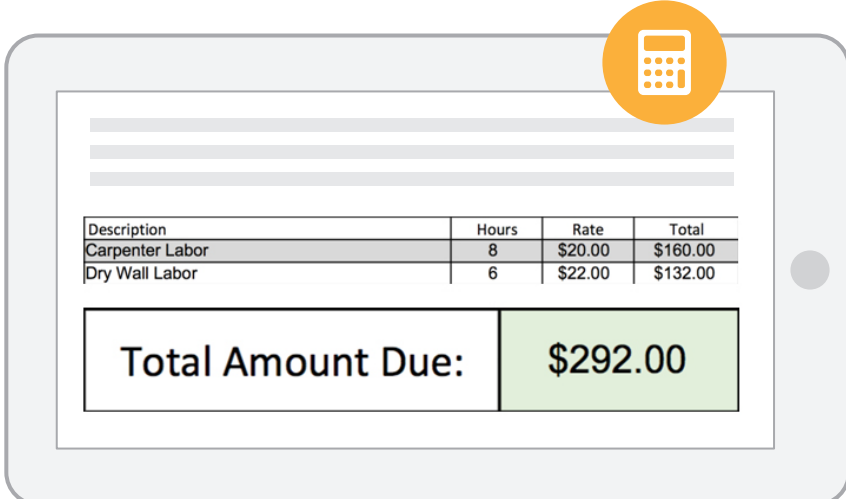
# FEATURE 4

## CALCULATED FIELDS

It's the digital era - why manually calculate totals for your form, when you can have the form do it automatically and accurately every time? A calculated field allows you to define and embed formulas in a form. Calculated fields do the math for you and can reference other fields in your mobile form to supply the values for equations (ie the formula for a Total field can use the value entered in the Quantity field and multiply it by what's entered in the Price field.) Reduce errors, save time and always produce accurate numbers.

### BENEFITS:

- Consistently record accurate numbers
- Save time by automatically calculating totals
- Prevent human error



Description	Hours	Rate	Total
Carpenter Labor	8	\$20.00	\$160.00
Dry Wall Labor	6	\$22.00	\$132.00

**Total Amount Due: \$292.00**

## USE CASE

Including calculated fields on a mobile expense report form ensures that your total reimbursement amount will always be correct and saves considerable amounts of time. Enter the values for each expense and the calculated fields will generate the totals and grand total automatically. You can even use image fields in your form to make attaching receipts to the expense report fast and easy.

# FEATURE 5

## AUTOMATED WORKFLOWS

Automation is key to increased efficiency in the modern business world. One of the most valuable features you can leverage from a mobile form is the ability to easily instrument workflows or triggers. For example, a mobile form can automatically email and forward copies of the form (for approval signature, record keeping, etc) when it is completed. You can also use mobile forms in more advanced workflows with your other business systems when actionable data is entered.

### BENEFITS:

- Make efficient use of employee time
- Prevent delays in crucial work activities
- Enforce business processes automatically



## USE CASE

Over time, equipment endures wear & tear and requires maintenance. A maintenance specialist can capture the relevant information with a mobile Repair Request form, recording damage and wear, and recommending the appropriate maintenance. When the form is completed, workflow logic can then either forward the request directly to the appropriate repairman or a supervisor who can approve and re-route.

# FEATURE 6

## API & INTEGRATION TO OTHER SYSTEMS

Mobile Form platforms allow forms and their data to be accessed by other business systems through integration connections. Many companies integrate their mobile form systems to CRMs, ERPs and other key business systems. Mobile Form platforms offer robust API and developer tools to make these integrations seamless, simple to implement and powerful to use. Integrations allow data to be available across an organization's various systems and help to maintain efficient and effective business operations. Some Mobile Form platforms also have pre-defined, 'ready-to-use' integrations with popular solutions such as Box, ServiceMax, QuickBase and Salesforce.com.

### BENEFITS:

- Continually update your backend systems with new data from the field
- Improve data organization and consistency
- Remove manual processes and reduce errors

### USE CASE

Mobile Form integrations with other systems allow you to amplify the usage of forms and the forms' data across your business systems and vice-versa. Prepopulate your mobile forms with information from your CRM system, and synchronize newly collected data from your forms back to the CRM. Integrations also allow for automatic updates to drop-down lists in your forms such as customer lists and parts lists; this ensures that your forms are consistent with the latest information in your backend systems.



# FEATURE 7

## REPORTS

Mobile Form platforms collect, store and organize all of the completed mobile forms and their data. This form data is stored in a cloud-based, structured database that provides powerful reporting and analytics tools that surface real time information and business trends from the field. This allows companies to make agile business decisions and helps organizations formulate future strategies based on previous trends and habits. Companies save significant amounts of time by running reports on specific data within forms, instead of having to sift through paperwork.

### BENEFITS:

- Obtain comprehensive, real time insights across your organization
- Better understanding of historical data and trends
- View analytics and reports across all forms and their data



## USE CASE

Reports give you the ability to instantly review data you have captured in your forms. For example, at the end of the year you may want to review all of the major deals you have closed. You can easily run a report to instantly pull the totals from all of your invoice forms and sort them accordingly. This is so much faster, more complete and more accurate than manually reviewing paper invoices and tallying the totals by hand.

## CONCLUSION

These mobile form features will help improve and modernize your business, empowering you and your colleagues to fill out 'Smart' mobile forms on your tablet and smartphone devices. Increase efficiencies, reduce costs and leverage the advantages of digital technology by using these features.

### Recap of Benefits of using these features in your mobile forms:

- Time savings
- Consistent and accurate data
- Better and more complete information
- Automated and streamlined business workflows
- Improved data management, organization and storage
- Comprehensive, real time insights across your organization



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# GOFORMZ ALLOWS YOU TO CAPTURE DATA ELECTRONICALLY WITH MOBILE FORMS THAT LOOK EXACTLY LIKE YOUR CURRENT PAPER FORMS.



## Mobile Forms

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



## Electronic Data

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



## Reports

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



## Collaboration

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



## Workflow

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



## Integration

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

Please visit us at [www.goformz.com](http://www.goformz.com)



# Thank You



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