



ARC American uses the GoFormz and Smartsheet integration to pass data between platforms, centralize record-keeping, simplify project management, increase accuracy, and save time.

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Energy & Field Service

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FORMS

- Unit Sheets
- Timesheet
- Work Orders
- Time & Equipment
- Payroll Forms
- Safety Forms
- Human Resources Forms

At-A-Glance

Challenge

ARC American initially needed a digital solution to replace their lengthy and unorganized 'Unit Sheet' documentation process, centralize their documentation, and streamline their payroll processing.

Solution

Leveraging the GoFormz and Smartsheet integration, ARC American digitized their forms collection for use on phones and tablets. These GoFormz-powered digital forms are connected to ARC American's Smartsheet account. Data is passed from ARC American's Smartsheet sheets to their GoFormz mobile forms, expediting form completion and improving accuracy. Once a form is completed, a PDF copy can be attached to a corresponding Smartsheet row, which simplifies project management and centralizes documentation.

Results

- Achieved significant billing efficiency improvements (can now process in a day what used to take a week)
- Centralized, digital record-keeping and project management
- Increased accountability and operational visibility
- Improved data entry accuracy and efficiency via pre-populated fields
- More legible and complete forms
- Project information readily available in forms, saving significant amounts of time

Why GoFormz

"I love it... GoFormz has made my life easier." - Terri Bryan, Accounts Manager, ARC American

About ARC American



ARC American Inc. is an electrical utility contractor that “specializes in the installation, maintenance, and restoration efforts of all facets” of electrical facilities. These efforts include storm repairs and restoration. ARC American works “with integrity, to meet the needs of our customers, to be a great place to work, to be part of a trade that we are passionate about...”

The Full Story

ARC American specializes in electrical construction and storm restoration, subcontracting with electrical and energy operations to deliver prompt, comprehensive electrical and storm recovery services. “We handle a lot of storm restoration, we go to restore the power, fix broken poles and more,” explained Terri Bryan, Accounts Manager at ARC American. When Terri began her tenure as an Accounts Manager, she was already familiar with the ease and digital simplicity of GoFormz Mobile Forms. At the time, ARC American was relying on eight-page documents called “Unit Sheets” to document the installation of electrical infrastructure and each component involved. This process was complicated by the cumbersome, manual nature of paper forms, illegible handwriting, and the large number of pages involved in each Unit Sheet.

“As the company grew and we opened new offices, information was being lost in the transition. We had to either fax or scan-and-email, because all of the forms were filled out on paper, and sometimes they were not very legible,” explained Cesar Leon, Systems Administrator for ARC American. “We needed something to be able to take that data and put it in a digital form so we couldn’t lose it.”

Recognizing an opportunity to modernize and optimize their documentation and processing, Terri introduced ARC American to GoFormz Mobile Forms. With digital versions of their Unit Sheets that could be filled out on tablets, phones and computers (instead of paper forms), ARC American was able to greatly reduce the amount of paper they used, while also simplifying data collection and review. Thrilled with the ease of their digital transformation, Terri was quite pleased with the simplicity of the GoFormz Template Editor. “It’s very easy,” she remarked.

Digital expansion

In addition to the Unit Sheets, ARC American has also digitized their payroll Timesheets, Work Orders, Time & Equipment logs, Safety forms, and various Human Resources documents. Each form is equipped with dynamic features and logic, to help Arc American personnel efficiently and accurately gather the necessary information. DataSources are used to automatically fill fields wherever possible, reducing opportunities for error. “For the employee name, it’s a Drop Down so they can pick an employee and pre-populate information,” Terri described. “Most everything is populated right away.”

To simplify the payroll process further, Terri created scheduled reports for management to review (rather than needing to sort

through manually submitted paper Timesheets searching for specific information). This makes the process easier for the organization and saves time.

"I love it... GoFormz has made my life so much easier."

The GoFormz and Smartsheet integration

While Terri introduced ARC American to mobile forms, Smartsheet — the leading work execution platform — was also entering the fold. "At the same time we were starting GoFormz, we were also implementing Smartsheet as a substitution for Google Sheets, which we had used to track our jobs," Cesar explained. "We get around 36 jobs every day, and we can have up to six forms per job. So there's a lot of document management and we need those documents to be able to bill."

Leveraging the GoFormz and Smartsheet integration, data can be passed from sheets to mobile forms – further elevating accuracy and expediting form completion. "We couldn't always rely on the guys remembering their job numbers correctly, which is crucial for us to complete and bill the jobs," Cesar explained.



By referencing Smartsheet as a source of data, mobile forms can be generated pre-filled with the latest project data, effectively minimizing data collection demands and opportunities for error. "We have reduced data entry," Cesar explained. By connecting their mobile forms to Smartsheet, Cesar and the ARC American team established a seamless pipeline of data between their platforms, resulting in more accurate, consistent, and efficient data capture. "We're able to take information from Smartsheet and move it to GoFormz, and it's displayed in the forms when they are being filled out."

"The job is created in Smartsheet, and after, in GoFormz, they just need to select the job number and it populates the Work Order number, the PO number, the address, the state, and other pieces of information, and displays them accurately."

Instant access to Smartsheet data while in the field has helped ARC American users better track time, equipment, and manpower expenditures in real-time. "People don't have to look for the right code for certain equipment, people don't have to check for spelling... it's been helping us keep track of information."

The integration also gives ARC American the ability to instantly attach a PDF of a submitted GoFormz mobile form to a corresponding Smartsheet row

– significantly optimizing project and document management. “Documents aren’t lost anymore. Any documents pertaining to a specific job can be automatically associated with the job row in Smartsheet.”

ROI - Incredible Efficiency

“This integration helps us manage where documents are going, to have things available when we’re ready to build...it helps us a lot.” Using the GoFormz and Smartsheet integration, ARC American has dramatically improved its billing processes and overall efficiency. “Before GoFormz and Smartsheet, someone from billing processed two jobs in a day, due to all of the inaccurate forms and information,” Cesar recalled.

“It was a lot of calling and not having the information we needed to bill. But now everything is there, correctly filled out, totally accurate, and they are able to go through it very fast.” This expedited process has led to incredible improvements in billing efficiencies, enabling ARC American teams to finish the work they would normally complete in a week, in just one day. “Now we have several users who are billing twenty to twenty-five jobs a day.”

What’s next?

Cesar and ARC American plan to leverage the ability to dynamically attach a PDF of a submitted GoFormz mobile form to a corresponding Smartsheet row. ARC American also plans to explore the GoFormz-Google Drive integration, further improving their record-keeping process.