



# Run Energy's Data From the Field Flows from GoFormz into QuickBase

## INDUSTRY

Energy

## CUSTOMER SINCE

2014

## FORMS

- Daily Timesheet
- Expense Reports
- Tool Kit Inventory
- Customer Technical Checklist
- Pump Volume Readings
- Employee Eligibility Verification



## At-a-Glance

### Challenge

Entering information collected from the field into QuickBase was a very manual, time-consuming process with potential for lost data.

### Solution

Integrated GoFormz with QuickBase

### Results

Field technicians are set up to succeed with the right tools. Measurable improvements in time savings and information quality. Data automatically flows from the field into QuickBase once a mobile form is completed.

- Daily Timesheets: 25% reduction in processing time
- Expense Reports: Processing time reduced from up to a month to just a few days
- Pump Volume Readings Forms: 100% reduction in technician data processing time
- Third Party Forms: 2x improved speed of new hire processing

# The Full Story

Run Energy is a global energy and environmental services company. They provide operations, maintenance, installation and technical services to a number of sectors such as wind power, gas systems and landfill environmental management.

Their teams capture a lot of information in the field and process customer information through various back office systems including QuickBase.

Ian Greig, Run Energy's Group IT and Technical Manager, sought to improve how forms were processed and how the information was managed. He faced a number of challenges with the existing forms process including:

- Forms are easily lost in the field and in the office
- Maintaining historical records and archives
- Transferring data from the forms into a database
- Dealing with incomplete forms
- Processing non-standard file types and formats: Paper/Doc/Excel/PDF forms sent from the field via fax, scan and mail

Additionally, Ian needed to streamline and automate how information flowed from the field into QuickBase. He wanted to improve

the overall flow of how data from the field was processed and stored.

He determined that using mobile forms on the GoFormz platform would address his existing challenges with form handling and management. With GoFormz, forms are instantly submitted to the office (no more fax, scanning, or hand-delivering), are centrally stored in the Cloud and incomplete or lost forms are a thing of the past. The GoFormz solution also means that the mobile forms (on ipads, smartphone and other tablets) can look exactly like the existing paper forms, which requires little to no training of the field teams on how to fill them out.

With the forms challenges addressed, Ian used Zapier (an integration solution that connects different applications with each other) and SendToQuickBase to easily connect GoFormz with QuickBase. GoFormz enables companies to track all meta data collected within a form so he could map information from the forms to QuickBase.

With his GoFormz and QuickBase integration, Ian was able to empower his team with a new and improved process.

They now fill out their forms on a mobile device in the field instead of on paper forms and the data flows directly into his QuickBase database.

Ian cites that

*“I didn’t even have to change the forms layout or go through any special training because the forms looked exactly like the original paper forms, only smarter.”*

The workflows and conditional logic built into the mobile forms help his teams be more proficient in the field and improve the flow of procedures (eg: automatically re-route forms for signature and approval). As soon as forms are completed, data is synced into QuickBase, automating the entire data entry workflow. This saves time, reduces data loss and improves the overall quality of system information.

## RESULTS:

1. Data from the field flows directly into QuickBase
2. Kept current form formats – no need to redesign or retrain
3. Faster data processing and review (Data entered in field is reviewed immediately in office – improves error checking)
4. Reduced errors result in many benefits including improved Billing and Payroll processing
5. Much quicker data delivery – to customers and internal processes
6. Better data analysis tools, and centralized data storage and retrieval

## SOME FORM-SPECIFIC RESULTS:

- Daily Timesheets: 25% reduction in processing time
- Expense Report: Processing time reduced from up to month to just a few days
- Customer Technical Checklist: 84% (and increasing) of checklists delivered within one day of task being completed
- Pump Volume Readings form: 100% reduction in technician data processing time
- Third Party Forms: 2x improved speed of new hire processing