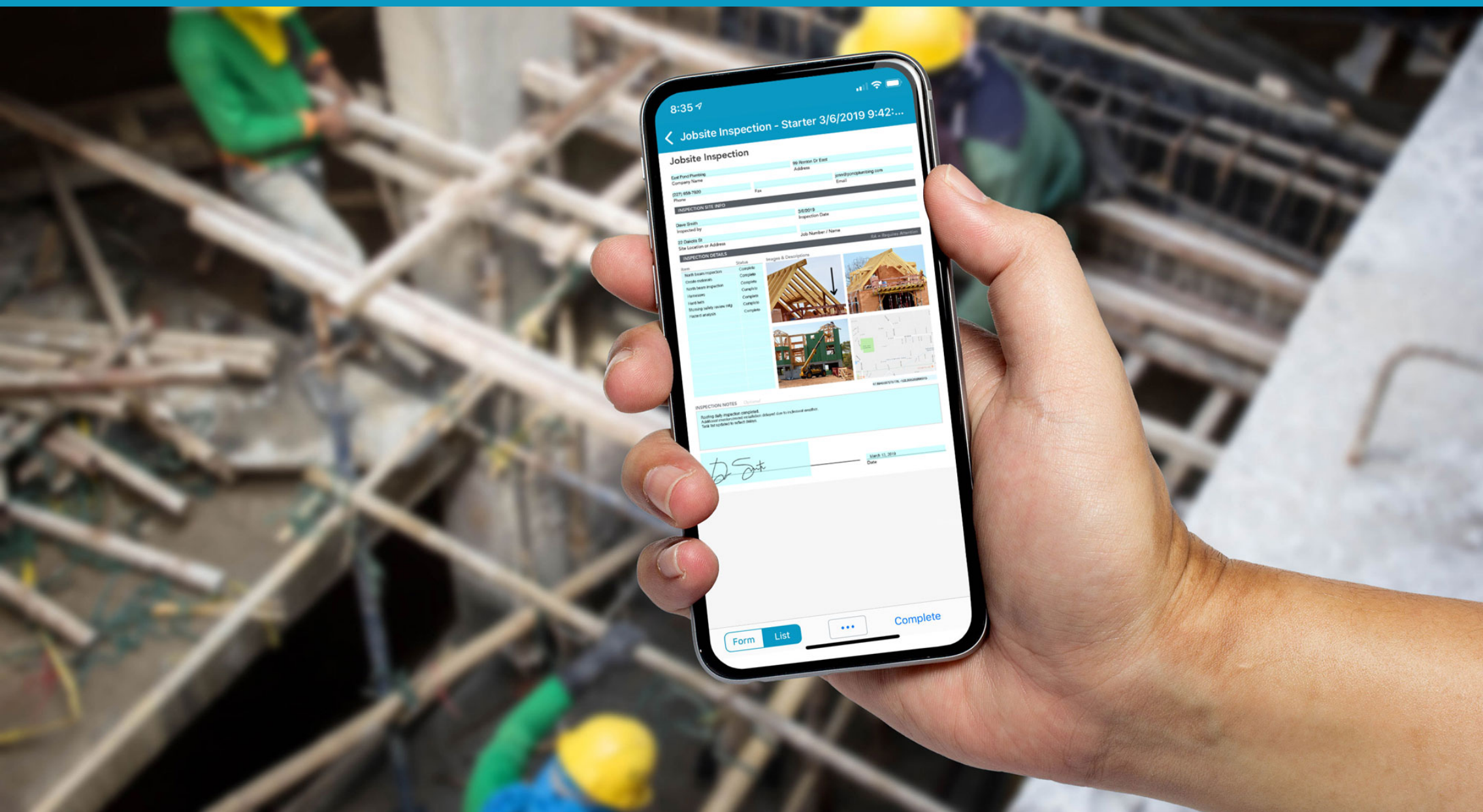




8 Mobile Forms Every Field Service & Construction Operation Needs

Table of Contents

Introduction	2
Job Proposal Form	3
Work Order Form	4
Jobsite Inspection Form	5
Invoice Form	6
Employee Timesheet Form	7
Injury/Illness Report Form	8
Employee Evaluation Form	9
Request for Time Off Form	10
Share fillable forms with anyone	11
Getting started with GoFormz	12
Conclusion	13



Introduction

Every day, construction and field service businesses use a large number of forms to capture and record job site, employee, and business data. When relying on traditional paper forms and manual processing workflows, many teams struggle with form delivery delays, illegible handwriting, missing forms and data, and frequent human error – making it difficult to ensure that collected data is complete and accurate.

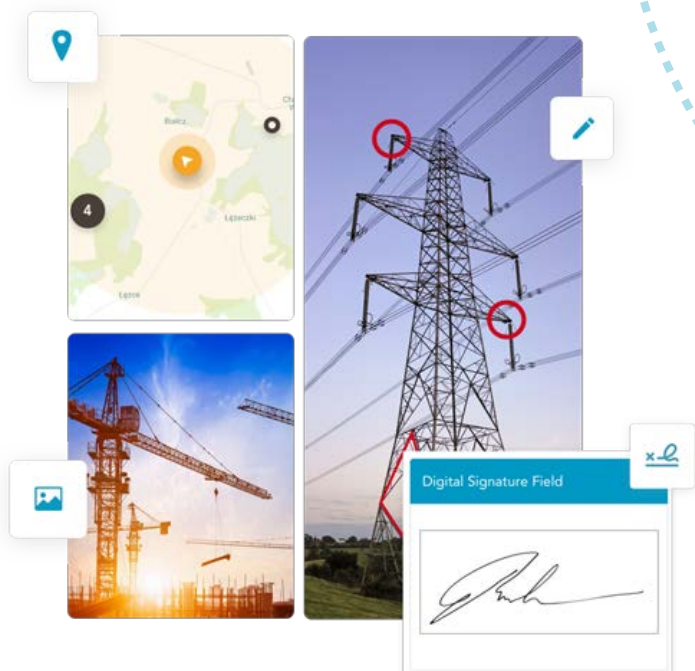
Mobile forms empower field service and construction teams to digitize their existing forms and processes, eliminating the need for paper forms and manual form delivery. Leveraging mobile forms helps teams run a leaner operation, save time, avoid error, and capture more comprehensive, complete data. This eBook highlights the 8 essential mobile forms field service and construction teams should be utilizing, both on the job site and in the back-office, including their key-features and use cases.

Job Proposal Form

Present customers with highly professional digital Job Proposals, that can be instantly authorized and signed. Digital Job Proposals can be easily equipped with *Automatic Calculations*, eliminating the need for tedious manual calculations and ensuring projected totals are highly accurate. *Image* fields can be used to directly input photographs of project locations and details. Once submitted, digital Job Proposals can be instantly routed to an input customer email address, back-office teams, and more. If at any point during the job there is a dispute regarding the original agreement, you can instantly access to the original document, featuring the appropriate time stamp and details – granting both the client and the company representative peace of mind.

KEY FEATURES

- Instant calculations
- Image fields
- Date fields
- Table fields
- Automated email



12:52

Job Proposal

View Ridge Landscape & Design

900 Windermere Drive, Suite #300

Company Name

Address

206-779-3492

sales@vrl.design.com

Phone

Fax

Email

PROPOSED BY

CUSTOMER INFO

Jessica Miller

Donald

Matthews

Sales Rep

First Name

Last Name

206-204-7192

344 172nd Street North

Phone

Address

7992

Seattle

WA

98103

Proposal / Project Number

City

State

Zip

3/24/2021

206-204-7192

don.matthews@westcott.com

Service Date

Phone

Email

JOB DESCRIPTION

TERMS & CONDITIONS

Tree and shrub removal for new housing development

Sprinkler head installation and care

LABOR & SERVICES

Hours

Rate

Total

Tree removal

5

\$200

\$1,000

Shrub removal

5

\$200

\$1,000

Sprinkler installation

12

\$50

\$600

Sprinkler system winterization

2

\$50

\$100

MATERIALS, EQUIPMENT & PARTS

Quantity

Price

Total

Galvanized Pipe

\$3,000

Valves

15

\$12.68

\$190.20

Risers

15

\$2.08

\$31.20

Heads

15

\$8.50

\$127.50

PROJECT IMAGES

Optional

Labor & Services

\$2,700.00

Materials, Equip. & Parts

\$3,348.40

TOTAL

\$6,048.40

Work Order

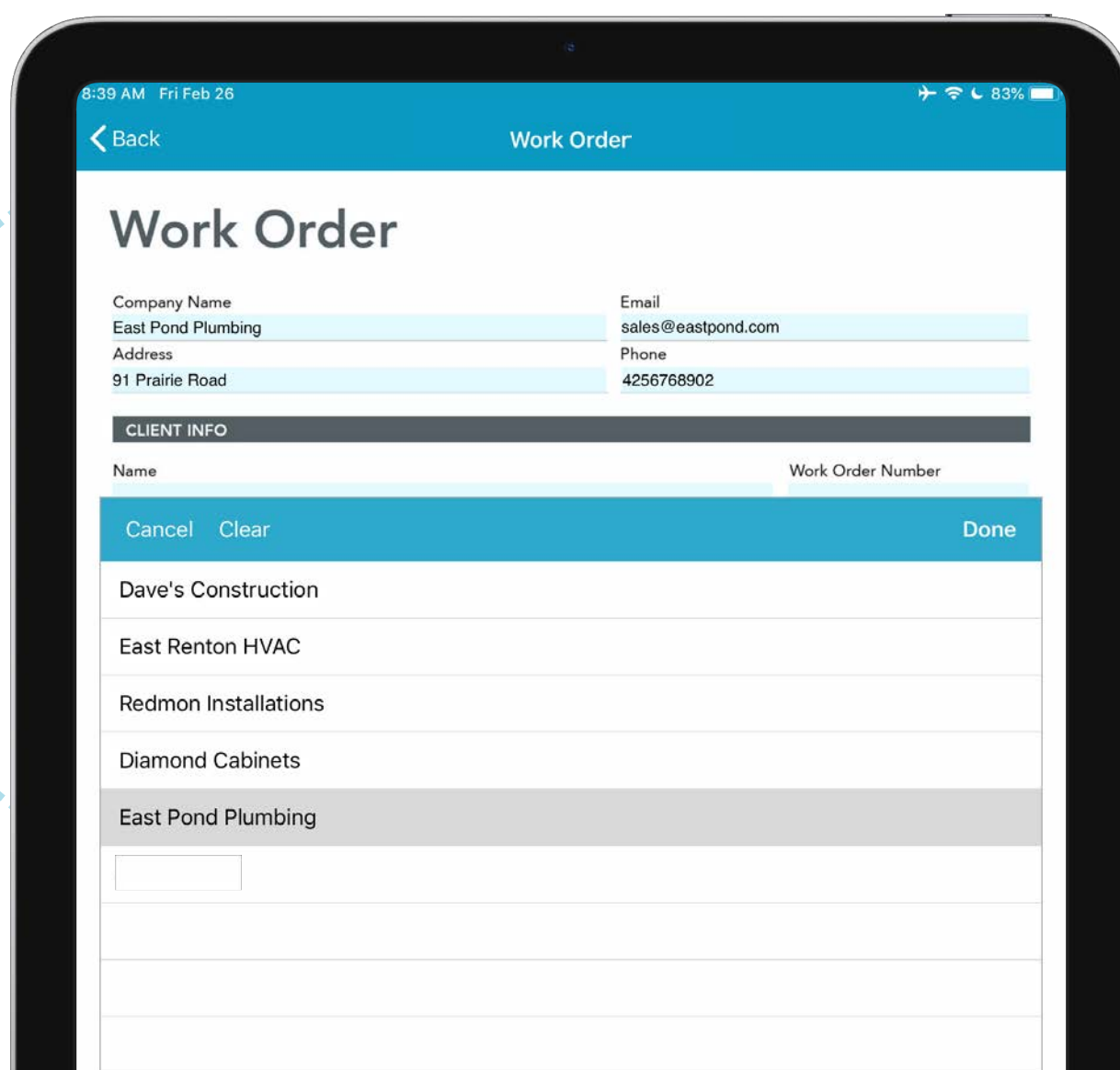
“GoFormz has made life easier because Work Order forms don’t get lost anymore. We have the workflow setup that when a form is completed it immediately comes over via email.”

-James Crotty, Head of IT Services, Atlas Acon Electric

Work Orders are used by businesses to record important customer details, job details, and associated costs for labor, services, and materials needed to complete the work. Use a mobile version of a work order form to automate these calculations as you type them into your mobile device, providing you with instant and accurate data every time. Mobile Work Order forms can be used to instantly calculate totals and organize line items within customizable *Table* fields. With [Automated Workflows](#), your Work Order form can instantly email copies of completed forms to supervisors, partners, and clients – accelerating processing and communication.

KEY FEATURES

- Auto-Fill fields
- Date fields
- Signature fields
- Text fields
- Table fields
- Automated email



8:39 AM Fri Feb 26

Work Order

Back

Work Order

Company Name: East Pond Plumbing

Email: sales@eastpond.com

Address: 91 Prairie Road

Phone: 4256768902

CLIENT INFO

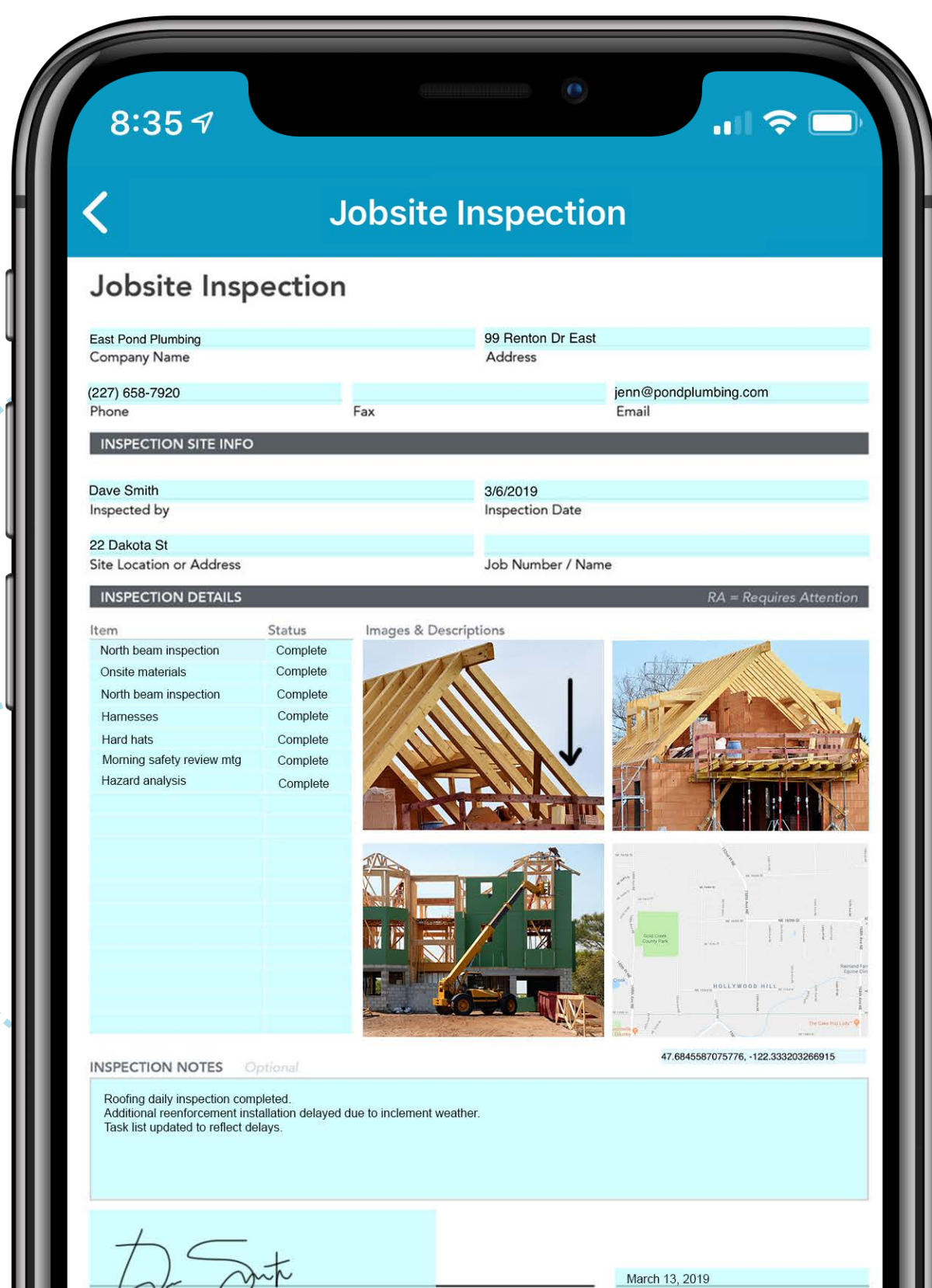
Name	Work Order Number
Cancel Clear Done	
Dave's Construction	
East Renton HVAC	
Redmon Installations	
Diamond Cabinets	
East Pond Plumbing	

Jobsite Inspection form

Jobsite Inspection forms are used to record findings from a visual examination of a piece of equipment, vehicle, or a job site as a whole. Digital Jobsite Inspection forms organize these findings within a centralized framework, making it easier to centralize and review critical safety data. This data can be further augmented with *Image* fields and *GPS* data, adding visual context to input information. Finally, critical fields can be made *Required*, ensuring important information is input before a form can be submitted.

KEY FEATURES

- Required fields
- Image fields
- Date fields
- Table fields
- Automated email



8:35

< Jobsite Inspection

Jobsite Inspection

East Pond Plumbing Company Name 99 Renton Dr East Address

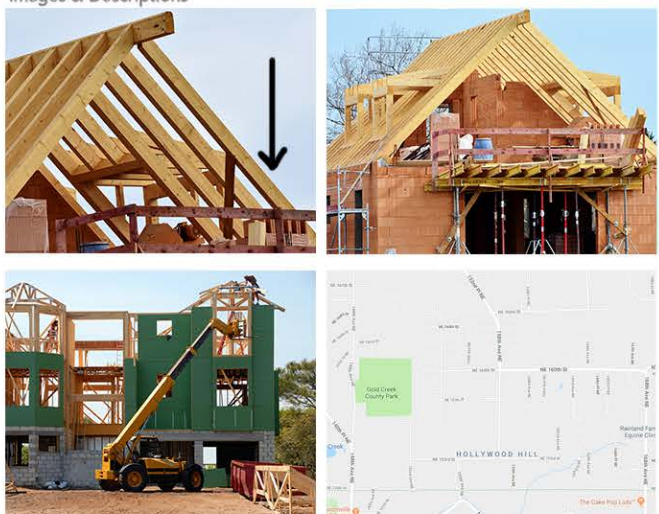
(227) 658-7920 Phone Fax jenn@pondplumbing.com Email

INSPECTION SITE INFO

Dave Smith Inspected by 3/6/2019 Inspection Date


22 Dakota St Site Location or Address Job Number / Name

INSPECTION DETAILS RA = Requires Attention

Item	Status	Images & Descriptions
North beam inspection	Complete	
Onsite materials	Complete	
North beam inspection	Complete	
Harnesses	Complete	
Hard hats	Complete	
Morning safety review mtg	Complete	
Hazard analysis	Complete	

INSPECTION NOTES Optional 47.6845587075776, -122.333203266915

Roofing daily inspection completed.
Additional reinforcement installation delayed due to inclement weather.
Task list updated to reflect delays.

 March 13, 2019

Invoice form

GoFormz makes it easy to complete and share professional digital Invoices with customers — expediting payments, improving accuracy, and elevating client communications. Provide a professional breakdown of project line items, like labor and services, by including a customizable *Table* equipped with instant *Calculations* in your digital Invoice. You can even automatically route Invoices to customers, partners and colleagues, and enable progress notifications, via custom, *Automated Workflows*.

F_x	Invoice
	=SUM([hours]*[labor+materials])
	=IF(SUM([hours]*[employees])>0,SUM
	=SUM([Table]![Column()][1]:[Column()

KEY FEATURES

- Instant calculations
- Date fields
- Table fields
- Automatic Tagging
- Automated email

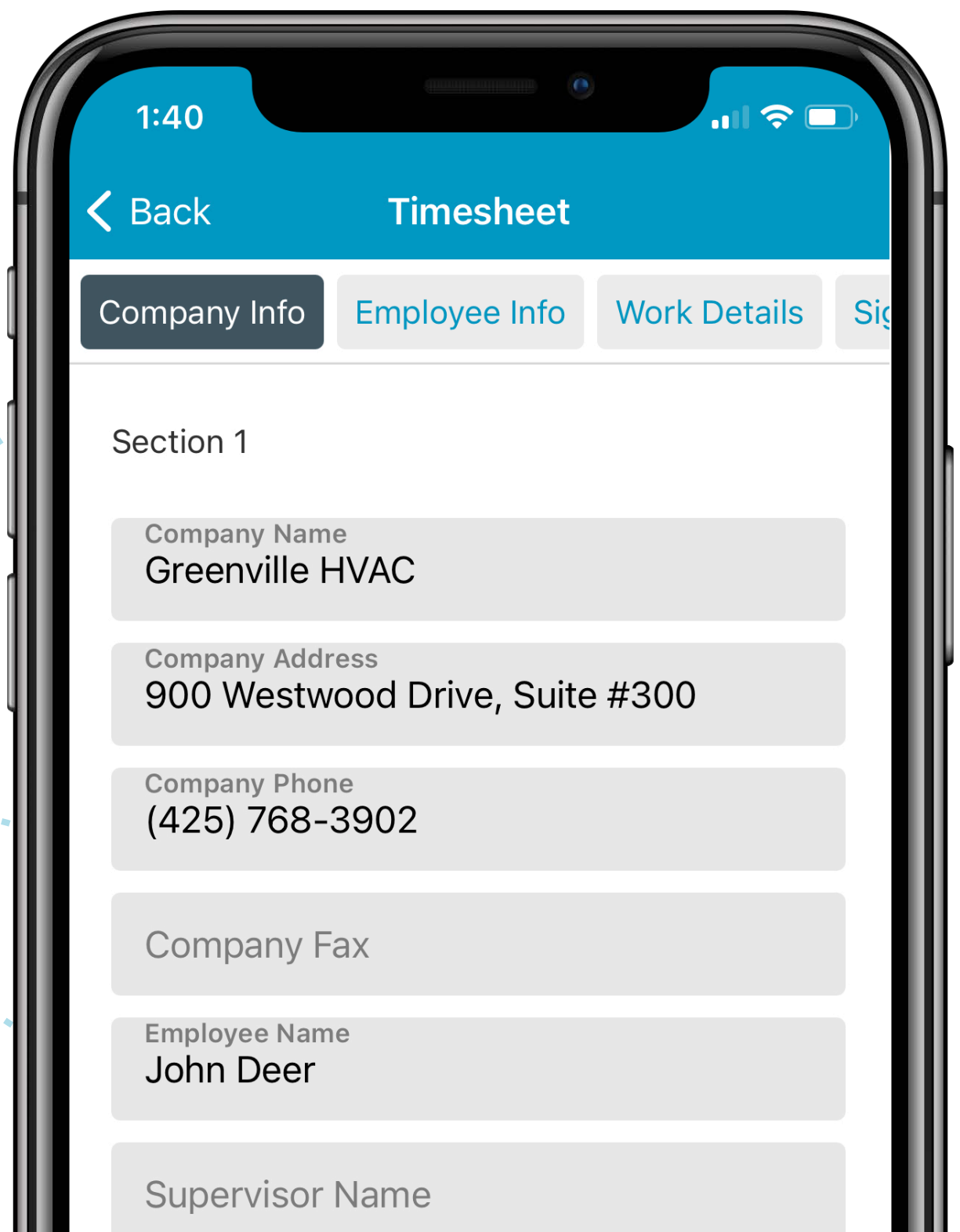
[illegible]

Employee Timesheet

Streamline payroll workflows, reduce human error, and track overtime hours, with digital Timesheets. Your digital Employee Timesheets can be easily equipped with *Table* fields, instant *Calculations*, *Signature* fields, and *Required* fields, to simplify the input of shift data. Your digital Timesheets can even be *Pre-Populated* with employee data based on a *User*, *Group*, or *Drop Down* menu selection. With *Date* and *Time* fields, your employees can easily input hours worked, with a quick tap. Once submitted, completed digital Timesheets can be instantly *Tagged* with an employee, department, or job

KEY FEATURES

- Instant Calculations
- Date & Time fields
- Table fields
- Automated email
- Automated Tagging
- Required fields
- Signature fields
- Database fields



1:40

< Back Timesheet

Company Info Employee Info Work Details Signature

Section 1

Company Name
Greenville HVAC

Company Address
900 Westwood Drive, Suite #300

Company Phone
(425) 768-3902

Company Fax

Employee Name
John Deer

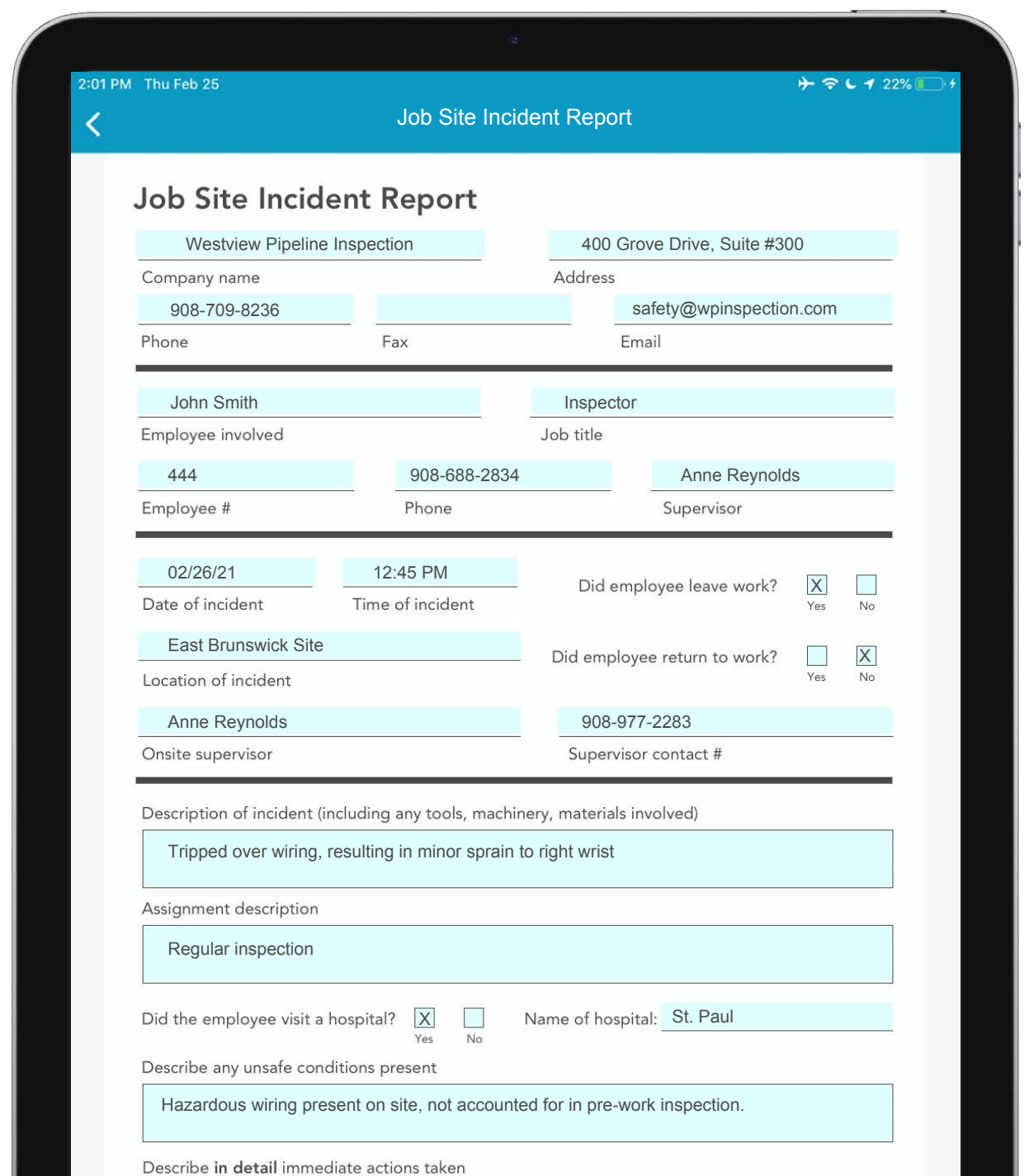
Supervisor Name

The Jobsite Incident Report

When workplace incidents and illnesses occur, ensure your job site is equipped to efficiently report back critical details. Digital forms enable your team to instantly generate Injury & Illness Reports on the job site. These digital reports make it easy to capture incident *Images* and annotate them with *Sketch* fields to highlight key details. *GPS* data and *Maps* can be used to precisely pinpoint the incident location. Leveraging *Conditional Logic*, if specific fields, like *Checkboxes*, corresponding fields can be made *Required*, *Visible*, or even change color. [Electronic Signatures](#) make it easy for witnesses and supervisors to sign-off on reports, which once completed, can be instantly routed to Human Resources, medical teams, legal teams, uploaded to connected systems, and more.

KEY FEATURES

- Image fields
- GPS & Maps
- Date fields
- Sketch fields
- Signature fields
- Conditional Logic
- Automated email



2:01 PM Thu Feb 25

Job Site Incident Report

Job Site Incident Report

Westview Pipeline Inspection 400 Grove Drive, Suite #300

Company name Address

908-709-8236 safety@wpinspection.com

Phone Fax Email

John Smith Inspector

Employee involved Job title

444 908-688-2834 Anne Reynolds

Employee # Phone Supervisor

02/26/21 12:45 PM

Date of incident Time of incident

Did employee leave work? ☒ Yes ☐ No

East Brunswick Site

Location of incident

Did employee return to work? ☐ Yes ☒ No

Anne Reynolds 908-977-2283

Onsite supervisor Supervisor contact #

Description of incident (including any tools, machinery, materials involved)

Tripped over wiring, resulting in minor sprain to right wrist

Assignment description

Regular inspection

Did the employee visit a hospital? ☒ Yes ☐ No Name of hospital: St. Paul

Describe any unsafe conditions present

Hazardous wiring present on site, not accounted for in pre-work inspection.

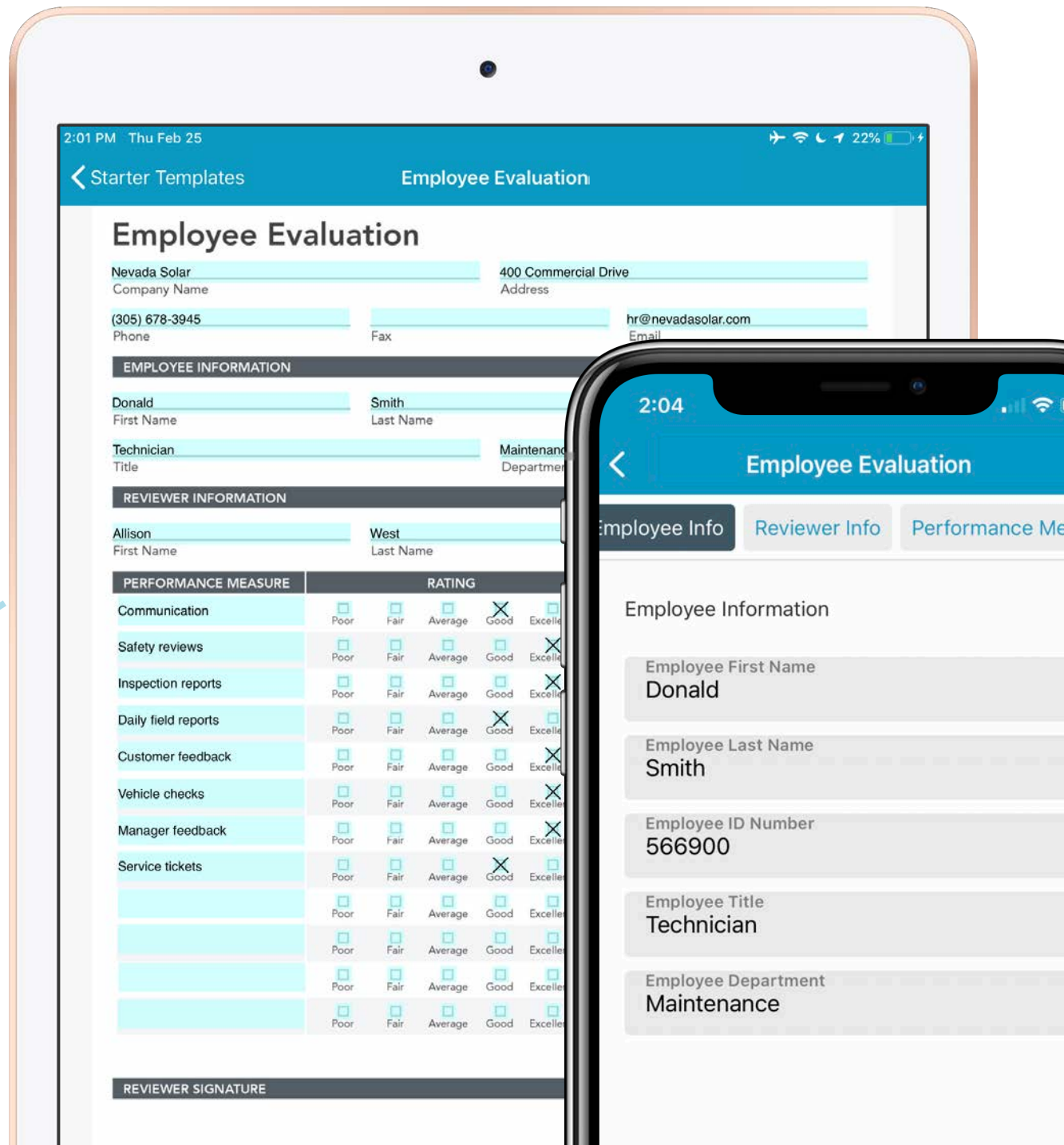
Describe in detail immediate actions taken

Employee Evaluation form

Creating, conducting and filing employee evaluations can be time-consuming. Digitizing Employee Evaluation forms can help streamline the process, accelerating form completion, routing, and record-keeping. Your digital Employee Evaluations can be easily equipped with *Likert Scales*, *Checkboxes*, and *Table* fields, to make evaluation data input a simple task. Employee information, like their address and contact details, can be automatically populated based on a *Drop Down* menu selection, eliminating the need for redundant data entry. Once completed, digital Employee Evaluations can be instantly *Tagged* with an employee name, routed to supervisors, or uploaded to connected systems.

KEY FEATURES

- Likert Scale
- Checkboxes
- Table fields
- Drop Down menus
- Automated email
- Automatic Tagging



Employee Evaluation Form Interface:

Tablet View:

- Header:** 2:01 PM Thu Feb 25, Starter Templates, Employee Evaluation
- Employee Information:**
 - Company Name: Nevada Solar
 - Address: 400 Commercial Drive
 - Phone: (305) 678-3945
 - Fax:
 - Email: hr@nevadasolar.com
- EMPLOYEE INFORMATION:**
 - First Name: Donald
 - Last Name: Smith
 - Title: Technician
 - Department: Maintenance
- REVIEWER INFORMATION:**
 - First Name: Allison
 - Last Name: West
- PERFORMANCE MEASURE TABLE:**

PERFORMANCE MEASURE	RATING				
	Poor	Fair	Average	Good	Excellent
Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Safety reviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Inspection reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Daily field reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer feedback	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Vehicle checks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Manager feedback	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Service tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- REVIEWER SIGNATURE:**

Smartphone View:

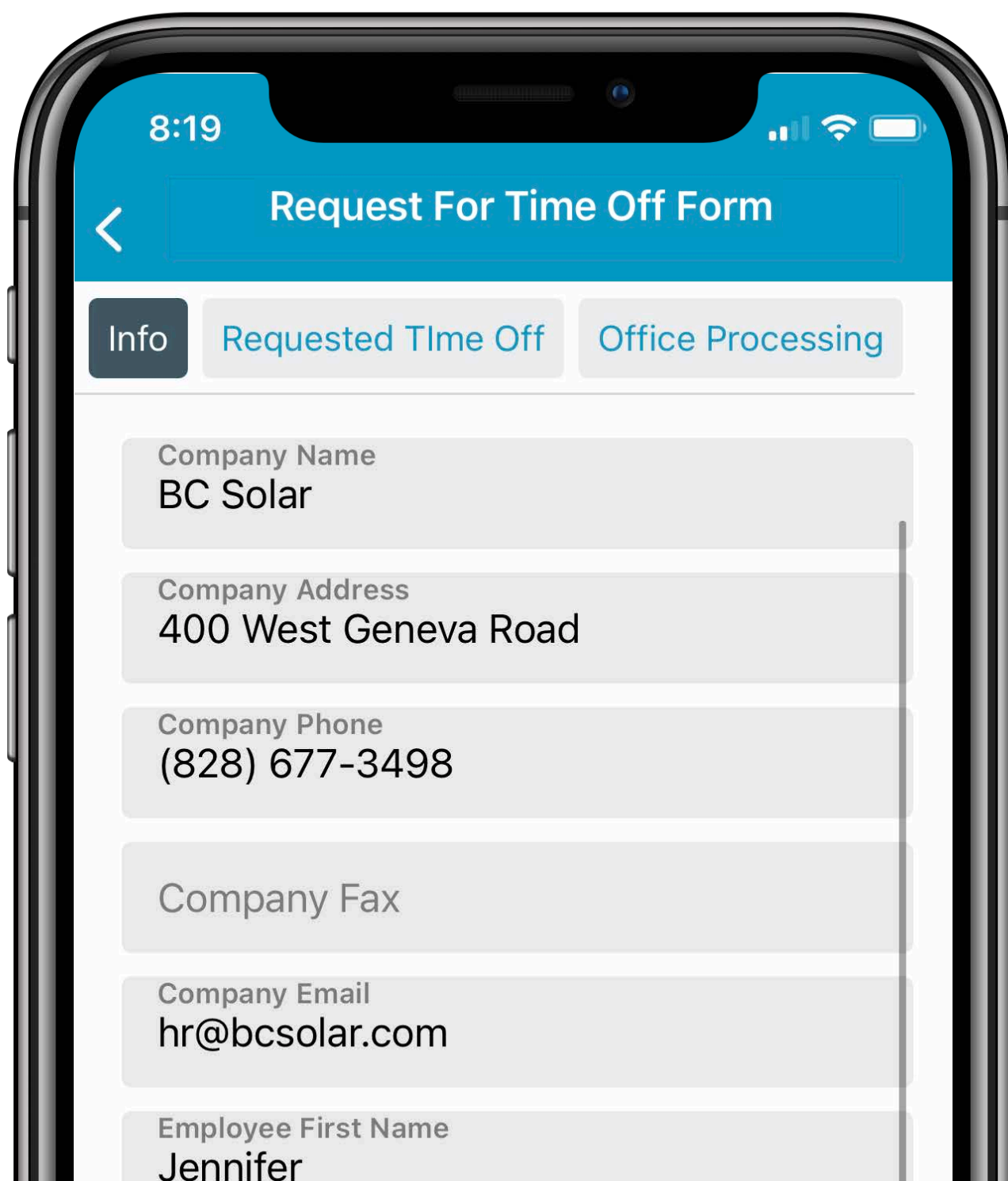
- Header:** 2:04, Employee Evaluation
- Employee Information:**
 - Employee First Name: Donald
 - Employee Last Name: Smith
 - Employee ID Number: 566900
 - Employee Title: Technician
 - Employee Department: Maintenance

Request for Time Off form

Digital Request for Time Off forms can be used to rapidly submit time off requests from any location – no paper forms required. Digital Request forms can be instantly populated with a user's information when generated, accelerating form completion. Leveraging *Table* fields, requested dates off can be included in clear, organized line items. Once submitted digital Request forms can be instantly routed to supervisors, human resources, payroll, and more. Your completed forms can even be *Tagged* with the employee name or uploaded to a connected system, streamlining processing. The real-time nature of digital Request for Time Off forms allows supervisors to rapidly review, approve, and respond to requests.

KEY FEATURES

- Table fields
- Date fields
- Time fields
- Auto-fill fields
- Automated email
- Automated Tagging



8:19

Request For Time Off Form

Info Requested Time Off Office Processing

Company Name
BC Solar

Company Address
400 West Geneva Road

Company Phone
(828) 677-3498

Company Fax

Company Email
hr@bcsolar.com

Employee First Name
Jennifer



Share Fillable Forms with Clients & Subcontractors

With the GoFormz [Public Forms](#) feature, links to your forms can be easily shared with clients, subcontractors, job applicants, and other individuals outside of your account, for to be filled out and completed from any location. This functionality makes it easy to collect authorizations, customer feedback, health screenings, and other critical data, without manual form delivery, postage, or rekeying collected forms. Once submitted, forms are available for review and processing in real-time, accelerating daily business processes like billing.

The **Public Forms** feature makes it easy to collaborate with subcontractors and key-players on the job site – [learn more about getting started with Public Forms](#).



Getting Started with GoFormz

- 1 Upload a PDF or JPG of your paper form to GoFormz
...or start from scratch using our 'List View' builder
 - 2 Make it smart and dynamic in the GoFormz Template Editor
Add digital fields, simple logic, automatic events, and more
 - 3 Fill out your digital forms using the GoFormz mobile app
Available on iOS, Android, and Windows
- (Optional) Share editable forms with users outside of your organization
Use Public Forms to share forms and collect data from anyone
- 4 Report on data in real-time, route data to other apps, and more

[Check out the GoFormz Quickstart Guide for more info on getting started!](#)



Ready to get started?

Sign up for a free trial or request a demo
of the GoFormz mobile forms platform.