

# **THE TOP 4 USE CASES FOR THE GOFORMZ & PROCORE INTEGRATION**





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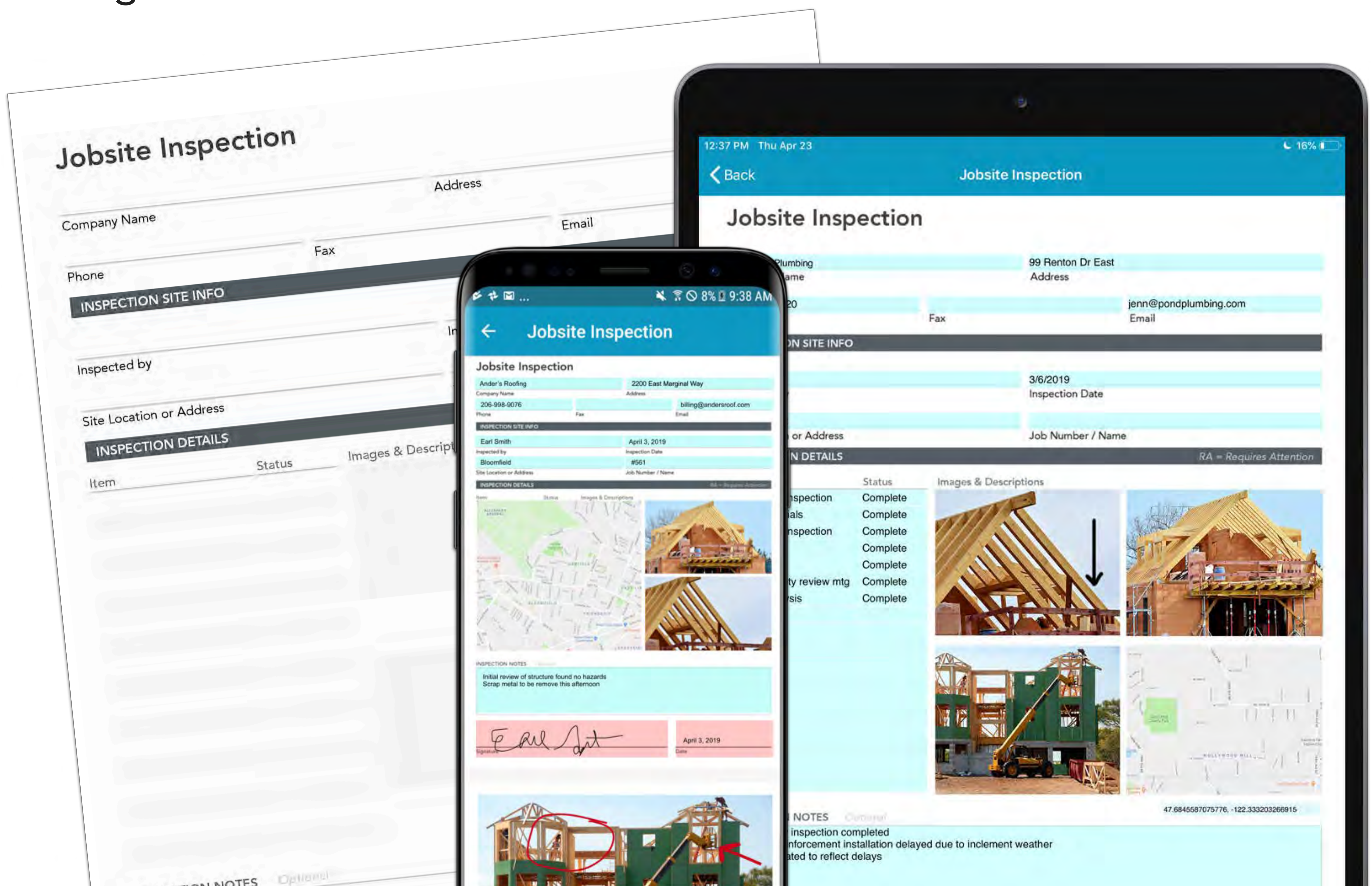
# Why go digital?

From general contractors to subcontractors (and everyone in between) if you work in construction, chances are you regularly complete or process paperwork. From Toolbox Talks and Job Site Safety Analysis to Service Tickets and Timesheets, paper forms not only create clutter, but also result in frequent human error and costly obstacles to productivity, including:

- Form delivery delays
- Illegible information (e.g. poor handwriting, weather-damage)
- Inaccurate information (e.g. incorrect math, misspellings)
- Rekeying hand-written information into computer systems
- Administrative demands

....and so many more.

Digitizing your operation's forms and processes allows your team to run a leaner, more productive operation, while prioritizing safety, accuracy, and quality. With GoFormz, **your digital forms can look exactly like your existing paper forms**, allowing your operation to maintain the look and feel of documents with specific formatting requirements, as well as its unique branding.





These digital forms can be easily generated from phones, tablets, and computers, or dispatched to teams in the fields pre-populated with project data. Digital construction forms can host new data types that paper forms and static PDFs simply can't handle. **Image** fields, **Sketch** fields, **GPS** data, **Maps** and electronic **Signatures** allow field teams to add context to collected data and improve visibility into job site activities.

Digital forms can even be filled out while working offline in remote areas and uploaded to the Cloud once a signal has been attained. Once submitted, digital forms are available for review and processing in real-time. Your forms can even be automatically routed to company contacts, subcontractors, and clients, or **uploaded to connected platforms, like Procore**. This functionality allows your digital forms to act as a familiar interface to the entirety of your operation's data capture – enriching your business end-to-end with highly accurate real-time data.





# The GoFormz & Procore Integration

Connecting your GoFormz mobile forms to Procore results in a vast number of opportunities to streamline your field-to-office workflows. GoFormz digital forms can act as a familiar interface for Procore data capture – allowing users to collect data within the forms they recognize and update or create corresponding records within Procore. Completed digital forms can be instantly **uploaded to the Procore Documents tool**, simplifying and streamlining record-keeping.

Procore data can in turn be used to **pre-populate and dispatch digital forms** to teams in the field, accelerating form completion while maintaining data integrity and eliminating redundancies. Leveraging **Drop Down menus** and **Database** fields, users can easily select a location, vendor, user, or another identifier, and instantly populate corresponding fields with highly accurate data – all pulled directly from your Procore records.

With the GoFormz-Procore Embedded Experience, Procore users can open, fill, and pre-populate digital forms from within the Procore platform. This seamless functionality allows users to conveniently access the digital forms they need, from within the same interface – reducing opportunities for disruption, while further streamlining the GoFormz-Procore integration. Finally, a GoFormz **Automated Workflow** can be used to automatically email PDF copies of the completed form to users, job site supervisors, subcontractors, and more.

**The following four use cases can be used to dramatically improve your construction data capture and processing, while improving efficiencies and simplifying analysis.**



# USE CASES





## USE CASE ONE

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# Instantly create Procore projects using GoFormz mobile form data

Empower your field teams to instantly generate digital construction forms in the GoFormz mobile app (or online) and input project information directly from their preferred mobile device. Once a form has been submitted, **input data is used to instantly create or update corresponding Procore records.** A PDF copy of the submitted form can even be **uploaded to the Documents tool, the appropriate record, and more.**

This use case not only improves efficiencies for field teams, but also back-office staff. With forms instantly uploaded to corresponding Procore records, admins no longer need to wait for forms to be delivered to the office from the field, which often results in costly delays and fragmented communication. With instant access to completed forms and input data, back-office teams and supervisors can act on opportunities and obstacles faster, improving business agility and insight into field team activities. As information no longer needs to be rekeyed into spreadsheets and digital systems, digital forms can also help reduce administrative demands and eliminate opportunities for human error.

### USE CASE BENEFITS:

- Eliminate the need to re-enter project data
- Improved visibility into field team activities
- Automate project creation
- Standardize project approval process

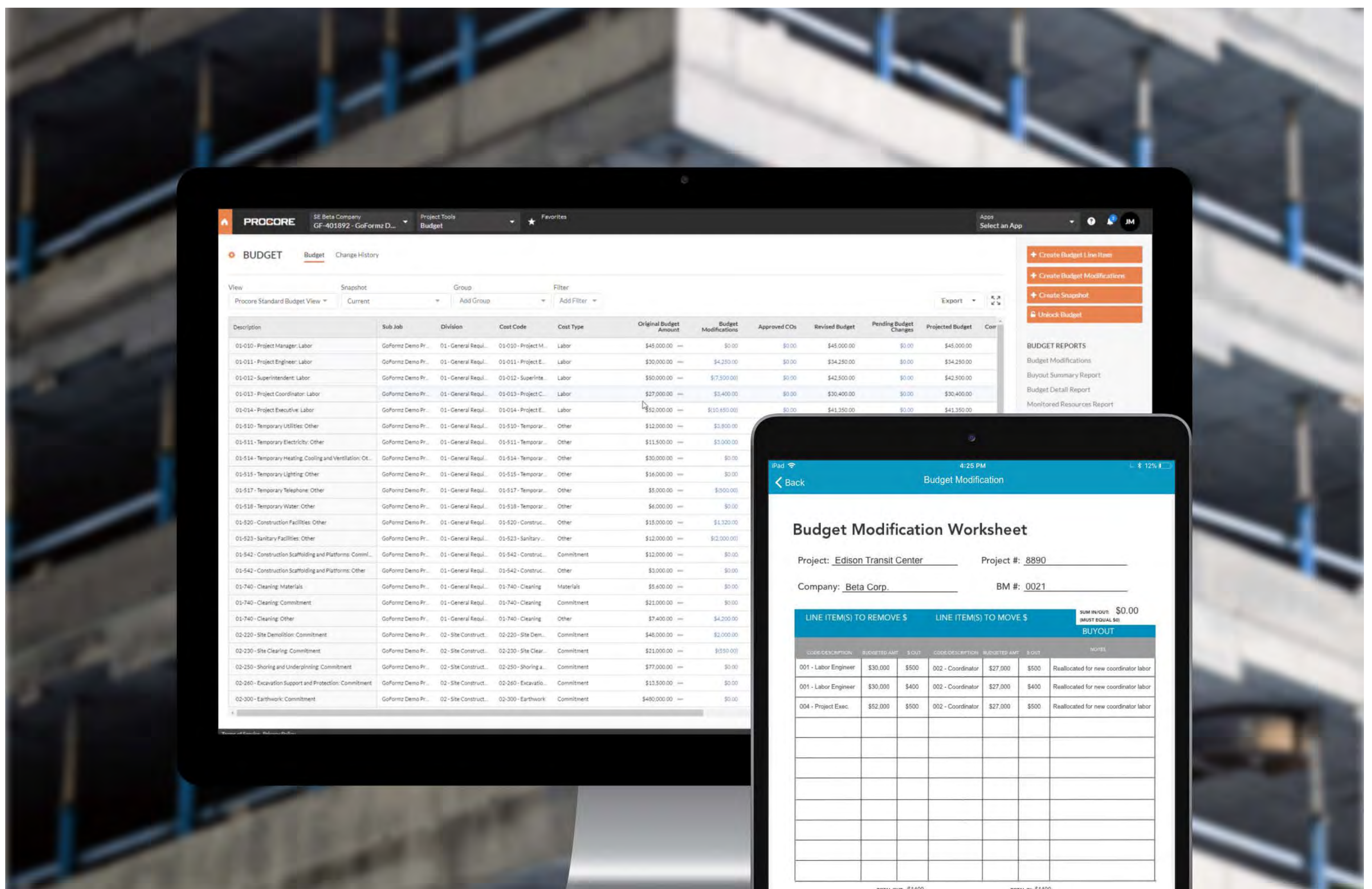
[Click here to watch a Project Creation use case overview video >](#)



## USE CASE TWO

# Streamline budget modifications with custom approval workflows

An excellent example of how the GoFormz and Procore integration can optimize your construction data capture workflow can be found within one of our most popular use cases: budget modifications.



Custom, automated approval processes can be configured for your project's budget modifications, allowing users to **take budget allocation from multiple cost codes or line items within a project budget and assign them to another area that needs funds unexpectedly.**

Digital forms significantly simplify the completion of budget modifications – streamlining the completion of worksheets and the approval process.



Table fields allow users to organize their budget modifications within clear line items. With instant calculations, totals, taxes, discounts, and more can be easily and immediately calculated within form fields – eliminating errors resulting from manual mathematics. Additional logic can even be added to the form to ensure that critical fields have been completed before a form can be submitted.

Once completed, the budget modification form can be instantly transferred to a project manager, using an *Automated Workflow*. Once the necessary key players have approved the budget modification form, our workflow will automatically upload a PDF copy of the form to the Procore Documents tool and the budget modifications will be reflected in the Procore Budget tool.

#### **USE CASE BENEFITS:**

- Streamline the review and approval of budget modifications
- Improve the accuracy of budget modification data with form logic
- Automates and standardizes budget modifications
- Automatic creation of modification once approved

[Click here to watch a Budget Modification use case overview video >](#)

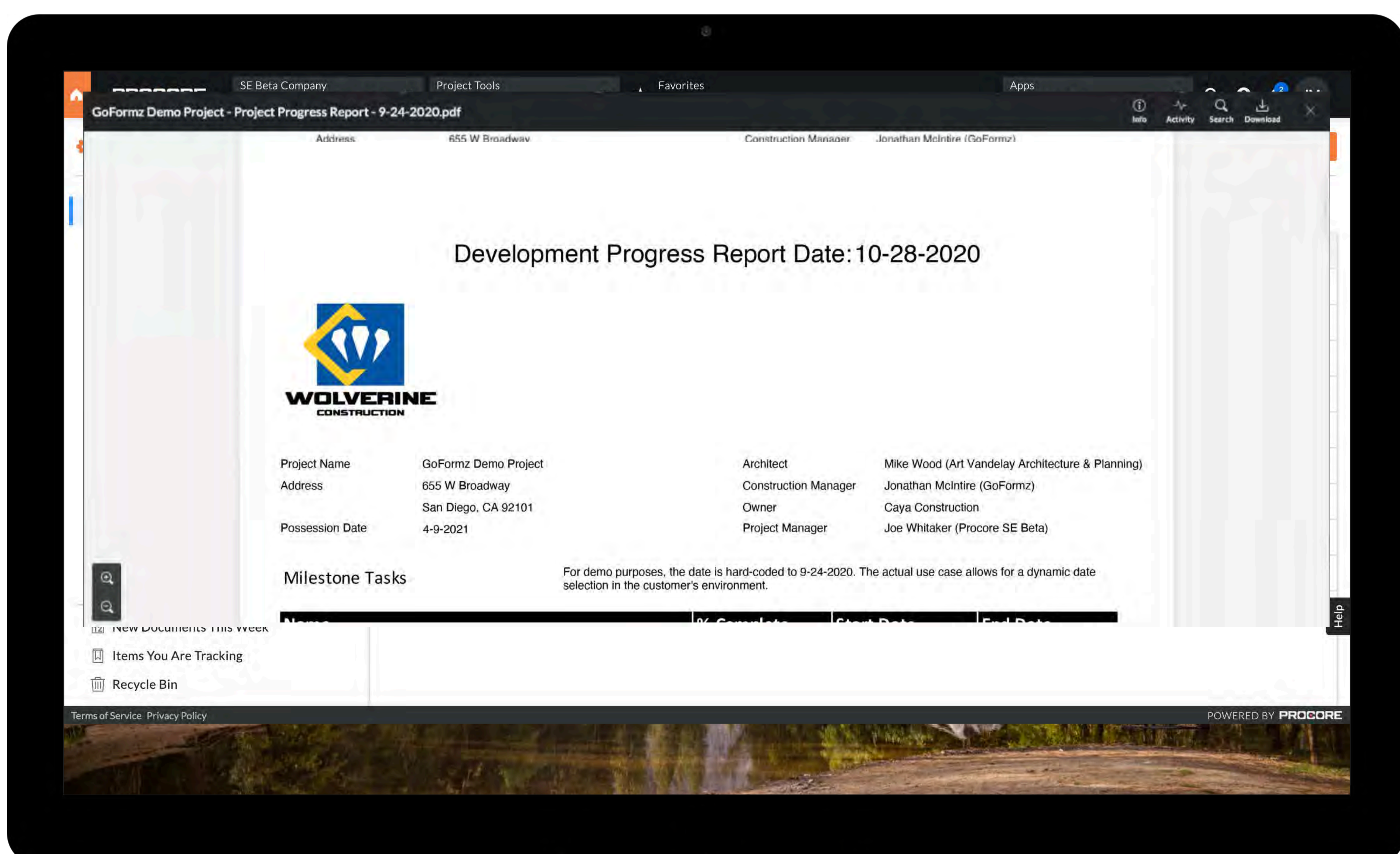


## USE CASE THREE

# Rapidly complete project summary reports

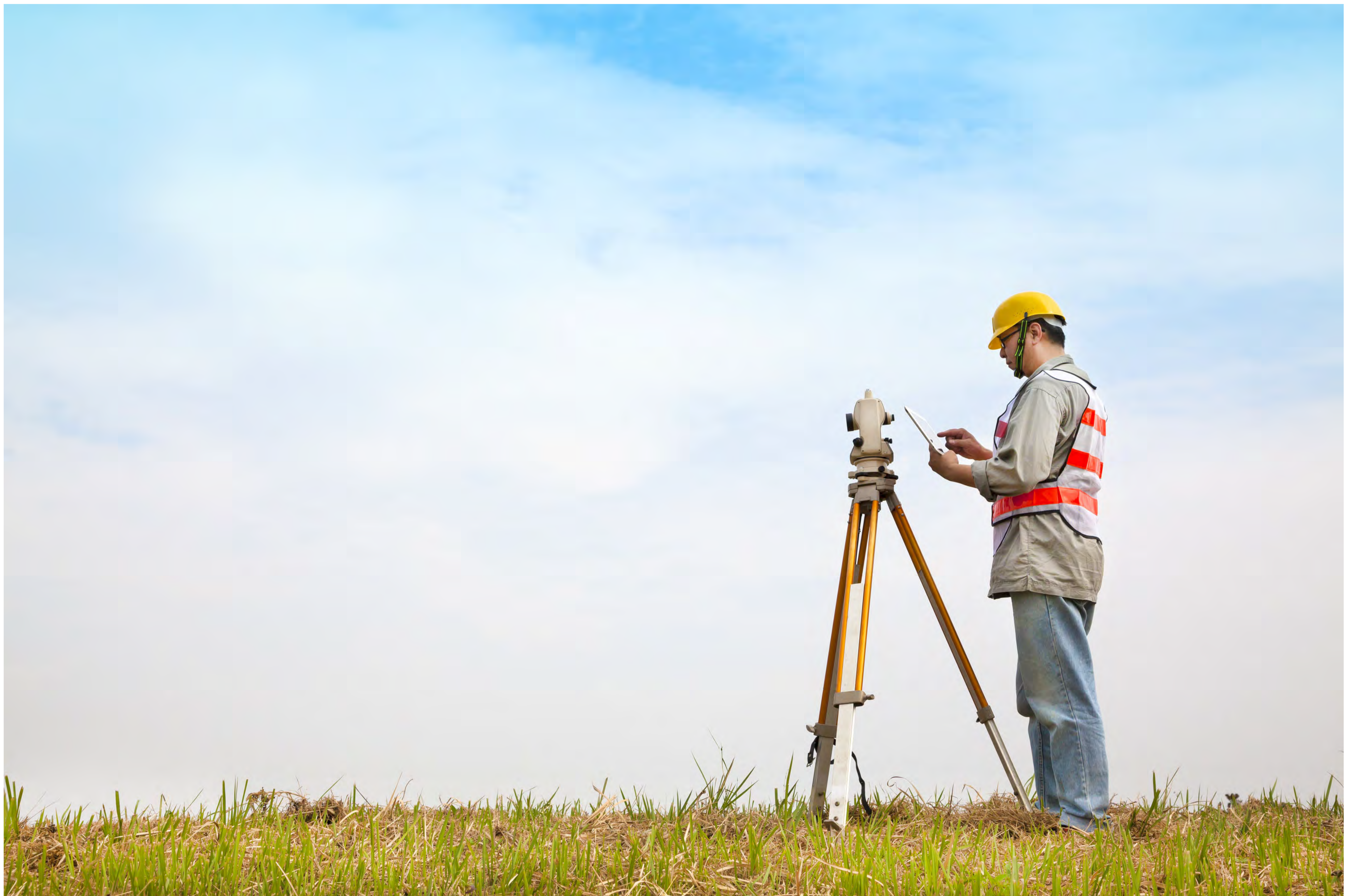
The GoFormz and Procore integration can also be used to automate the completion of project summary reports, which can be completed in GoFormz and instantly emailed to the appropriate contacts and uploaded to the Procore Documents tool. This is made even simpler with the GoFormz and Procore Embedded Experience, which allows users to initiate the completion of a project summary report from within the Procore interface.

Once generated, digital project summary reports can be automatically routed to an email inbox. This report will be populated with data from the appropriate Procore record, including the project roles, project address, milestone dates, activities, and project dates. Because Procore has an open API, GoFormz can pull in many other types of data such as Procore Punch List Items, Observations, Weather Logs, open RFIs, a two-week lookahead, project photos, and more.





This eliminates the need for administrators to rekey information from a variety of different forms and records into one single source of truth – it's instantly populated for them! This automation not only improves the accuracy and efficiency of project summary reports, but also ensures that each key-player is automatically included in the communication of these details.



### **USE CASE BENEFITS:**

- Accelerated completion of project summary reports
- Eliminated data entry redundancies and opportunities for human error
- Increased insight into project progress

[Click here to watch a Project Summary Report use case overview video >](#)



## USE CASE FOUR

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# Mandatory form data capture and output

When working with government agencies, a regulatory body, or legal contracts, forms often need to look a certain way, which can be difficult when relying on rigid data entry apps that cannot maintain the look and feel of existing documents. Fortunately, GoFormz' patented technology allows users to upload and digitize their existing work documents for use on phones, tablets, and computers. This means that government forms, safety documentation, and other forms that must maintain specific formatting can be easily digitized and used to collect project information.

Leveraging a custom workflow and the Procore integration, teams can use the custom format they need to capture and input data, while also utilizing the API to pull data from Procore and create the custom data output format they need. Once completed, a workflow can be used to enforce approval processes, ensuring each critical step is completed before a form reaches the Procore Documents tool.

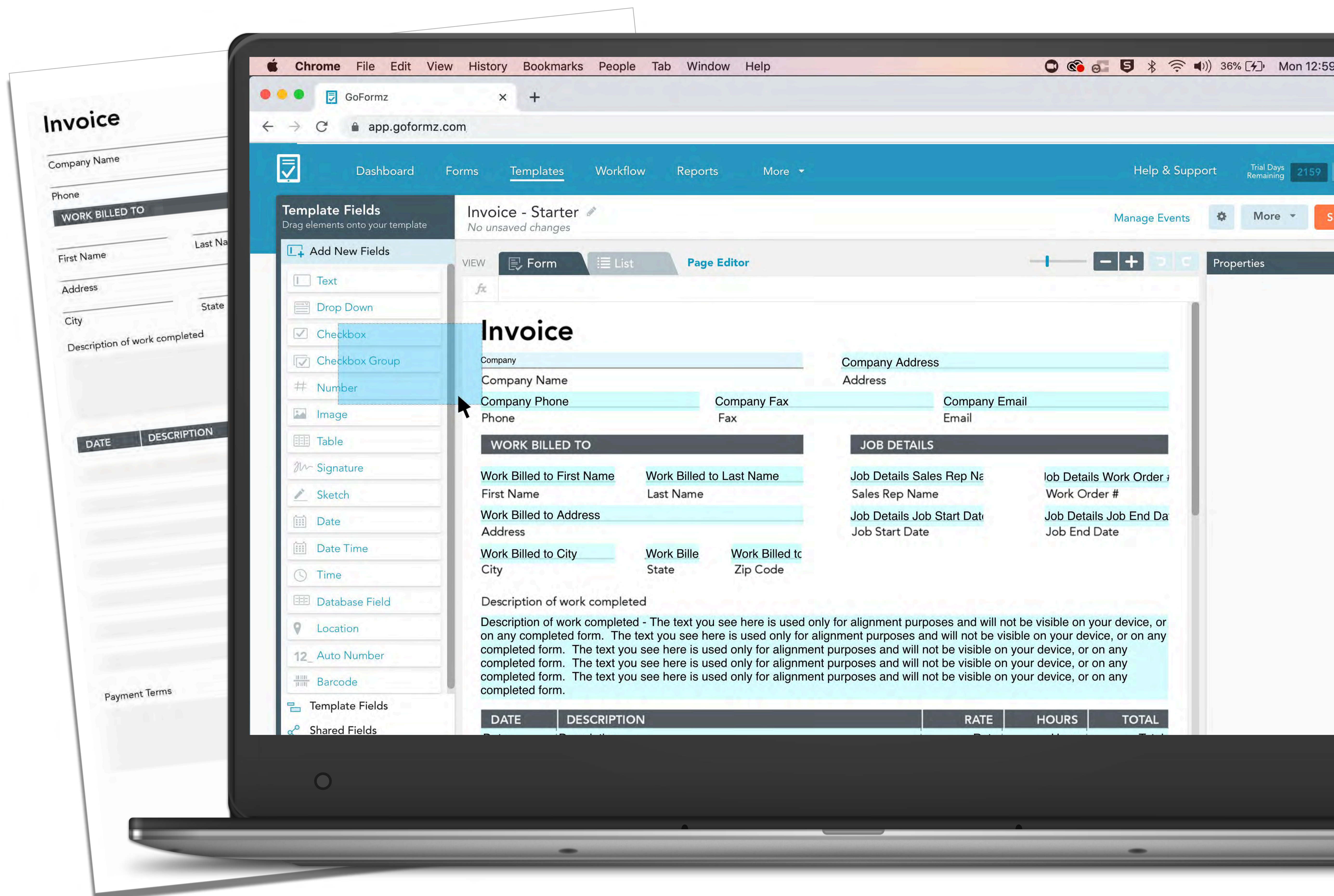
### **USE CASE BENEFITS:**

- Maintain critical
- Ensure data is accurate before it reaches Procore
- Enforce form approval processes
- Automatically upload to the Documents tool



# Getting started with GoFormz

- 1 Upload a PDF or JPG of your paper form to GoFormz  
*...or start from scratch using our 'List*
- 2 Make it smart and dynamic in the GoFormz  
*Add digital fields, simple logic, automations, and more*
- 3 Fill out your digital forms using the GoFormz  
*Available on [iOS, Android, and Windows](#)*
- 4 (Optional) Share editable forms with anyone  
*Use Public Forms to share forms and collect data*





## Interested in the GoFormz & Procore integration?

Contact your account manager to learn more about the  
GoFormz and Procore integration  
or contact us at [proservices@goformz.com](mailto:proservices@goformz.com).

Sign up for a free trial of the  
GoFormz mobile forms platform at  
[www.goformz.com](http://www.goformz.com)